



United States Department of Agriculture

Global Rice Trade Expected to Increase in 2021, Production and Stocks Projected to be Record High in 2020/21

USA Rice Federation Webinar
for Rice Importers in China
October 27, 2020

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**Data approved by the World Agricultural Outlook Board.
Estimates and forecasts are from the
October 2020 WASDE.**



The 2020/21 Global Rice Market:

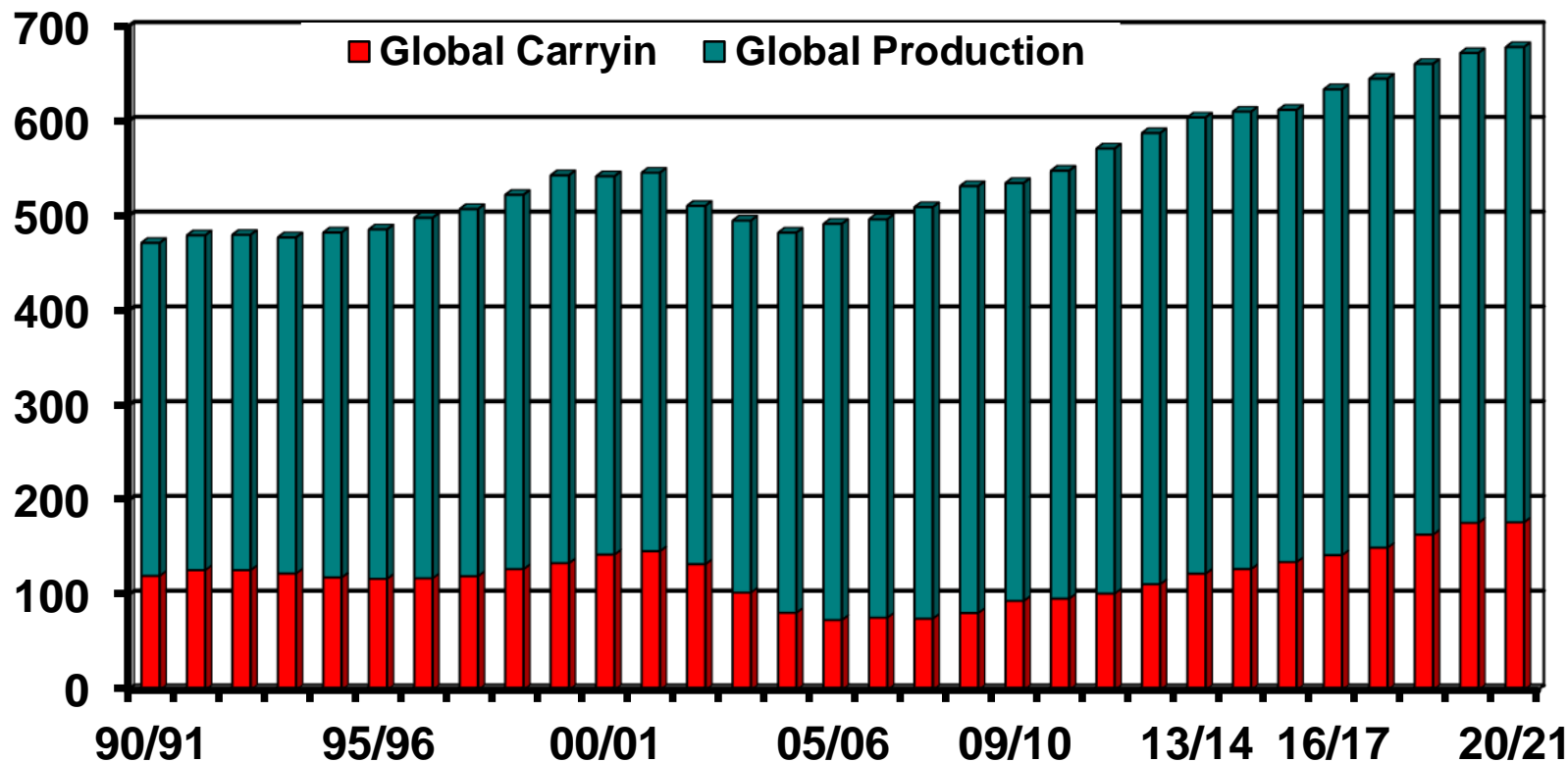
Main Points

- **Record production** is projected for **South Asia**, stable production is projected for **East Asia**, and partial crop-recovery from drought is projected for **Southeast Asia**.
- Global consumption and residual use is projected record high, with **China** accounting for most of the increase and **India's** domestic use remaining very high due to its pandemic-related food relief program.
- Global **trade** is projected to increase 3 percent in 2021 from the 2020 pandemic-limited level, with both **India** and **Thailand** increasing exports.
- Exportable supplies in **MERCOSUR** are projected to remain extremely tight until harvest in the spring of 2021, supporting expanded **U.S. exports** to Latin America.
- Global rice **ending stocks** in 2020/21 projected to be **record high** and to be the **14th** consecutive annual increase.



Global Carryin, Production, and Total Rice Supplies Are All Projected To Be Record High in 2020/21

MIL. TONS

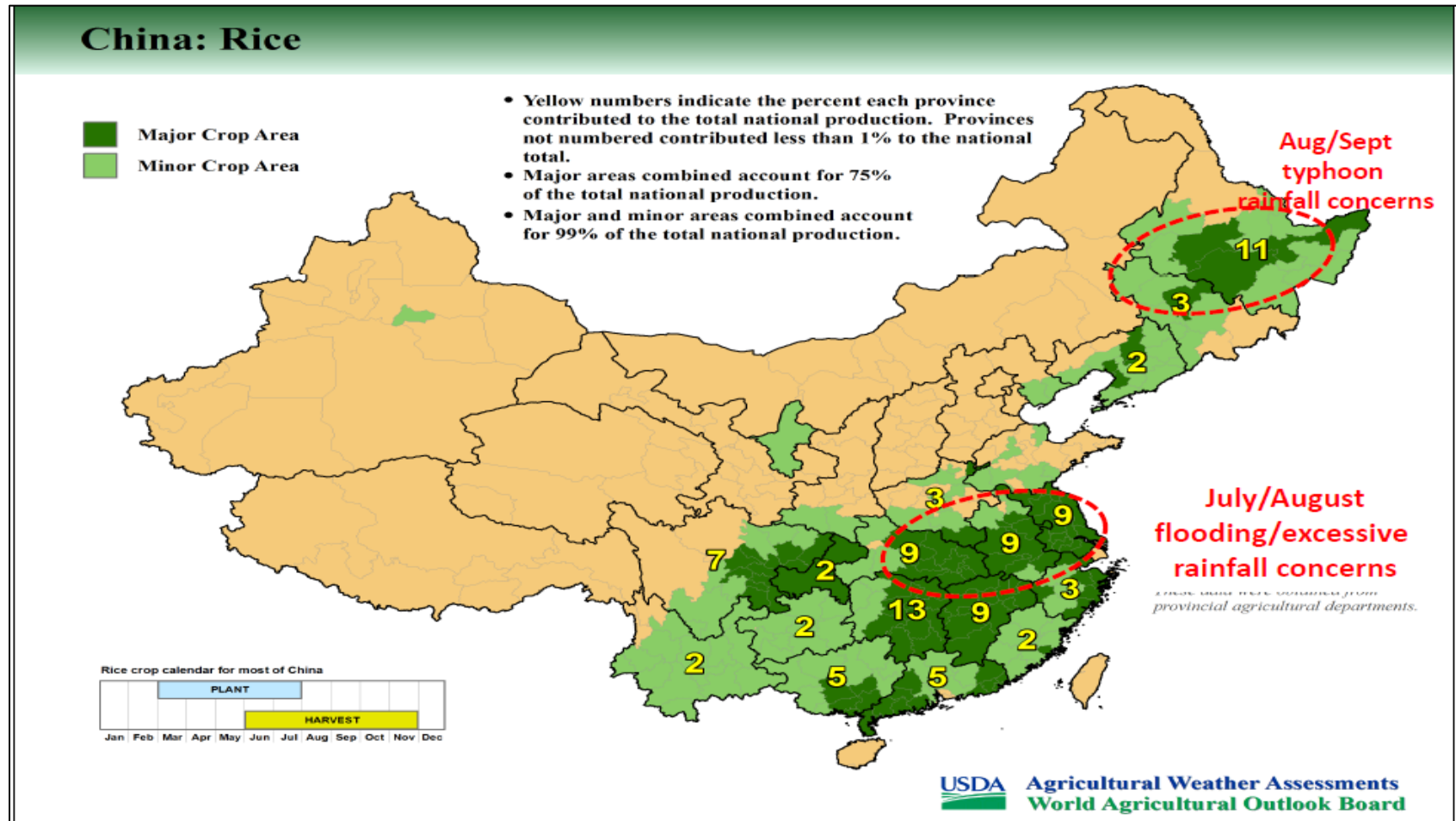


Milled basis. 2020/21 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.

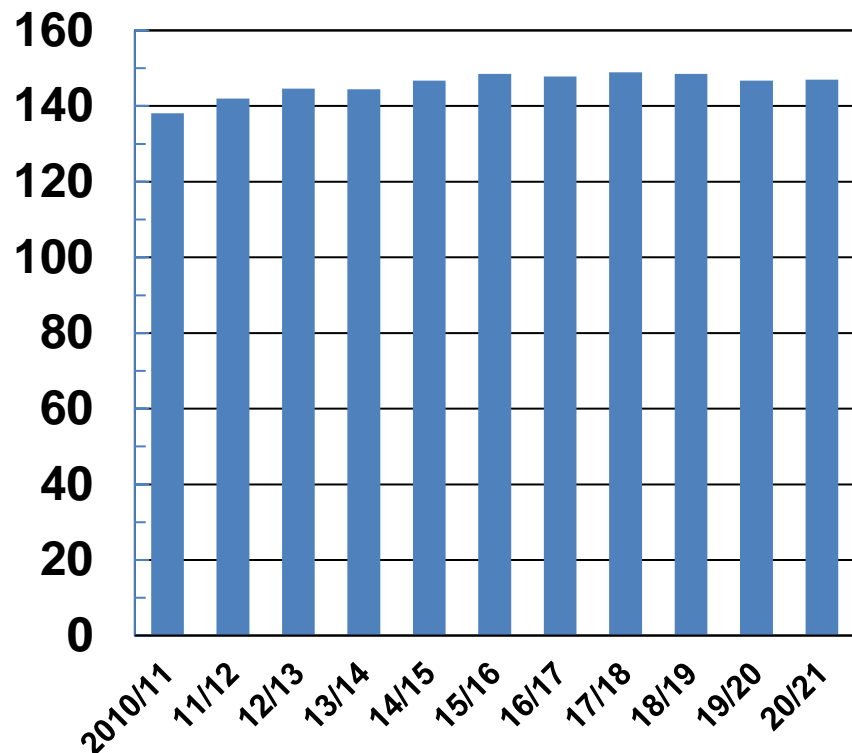


China Weather July-September: Excessive Rainfall and Flooding in the Southeast, Typhoons in the Northeast



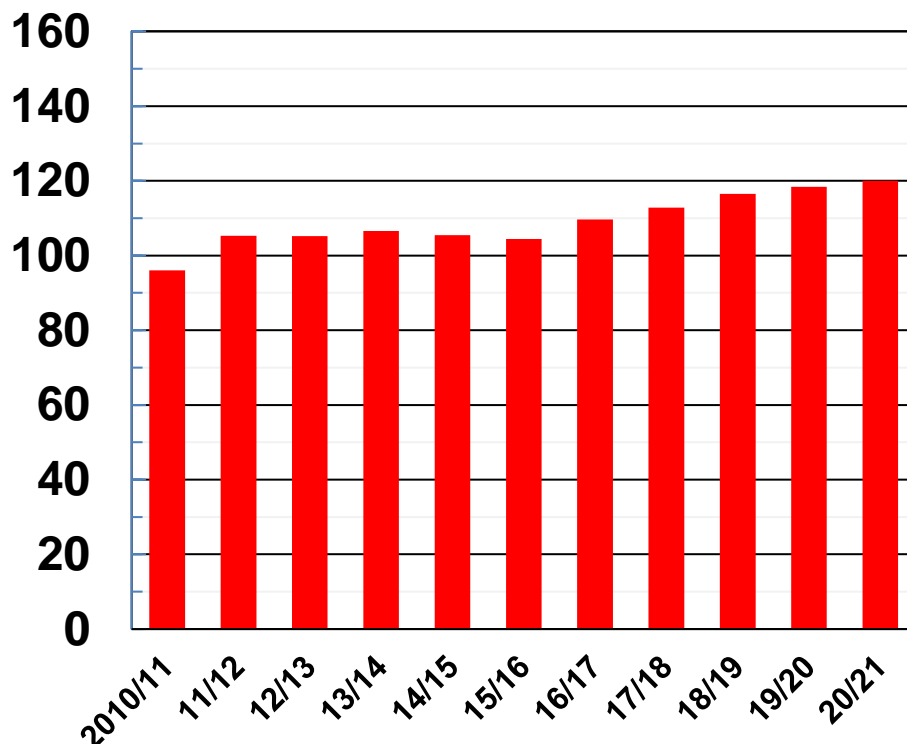
China's 2020/21 Production Projected to Remain Below Record; India's Projected to be 5th Consecutive Record

Mil. Tons



CHINA

Mil. Tons



INDIA

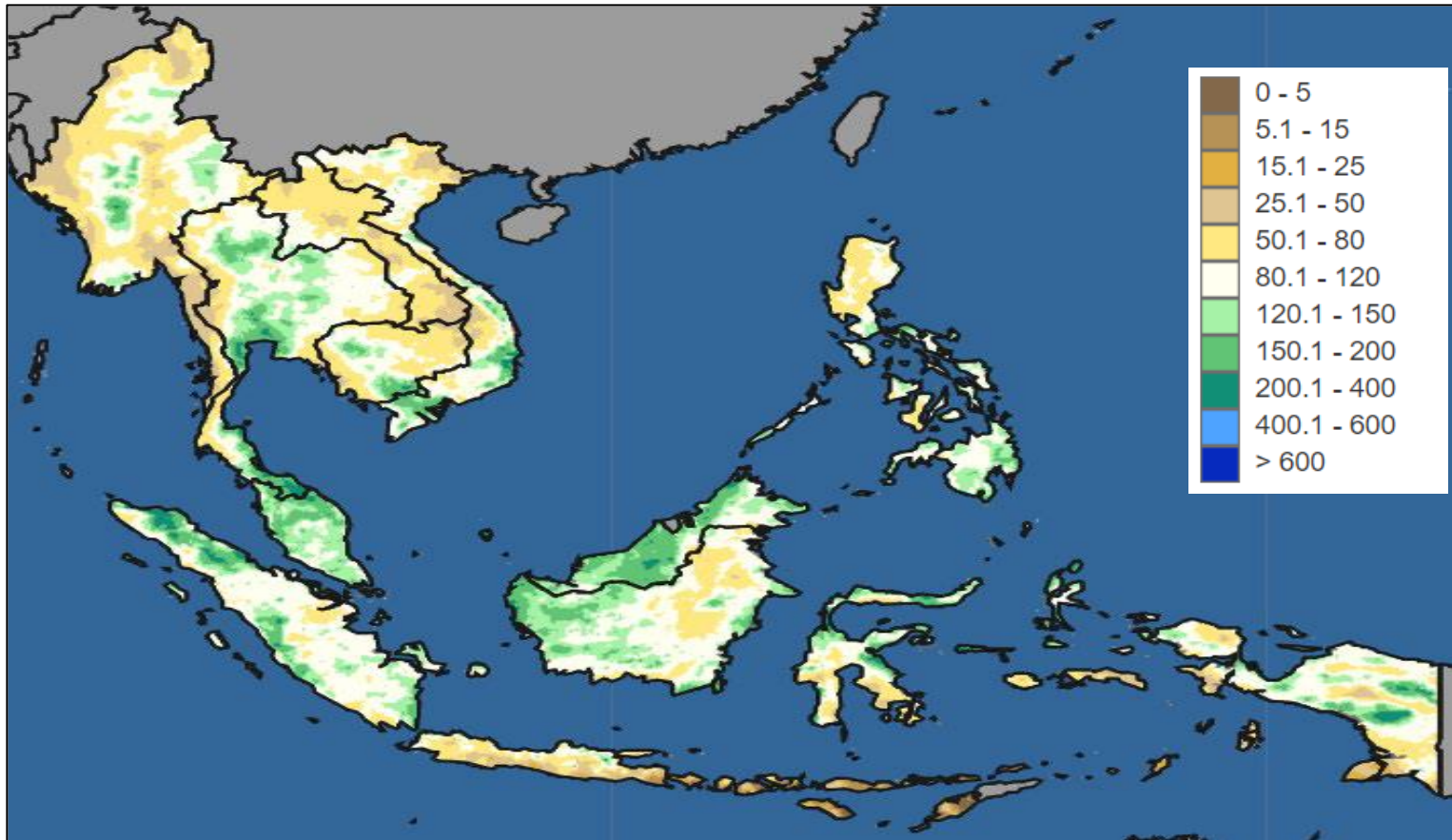
Milled Basis. 2020/21 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



SOUTHEAST ASIA: After a drier than normal summer in the majority of the rice growing areas, a return of the rainy season benefited many of the rice areas. Countries and regions that have been impacted by continued dryness include Burma's Delta, the Philippines, and Laos.

Percent of normal rainfall June 1- August 30

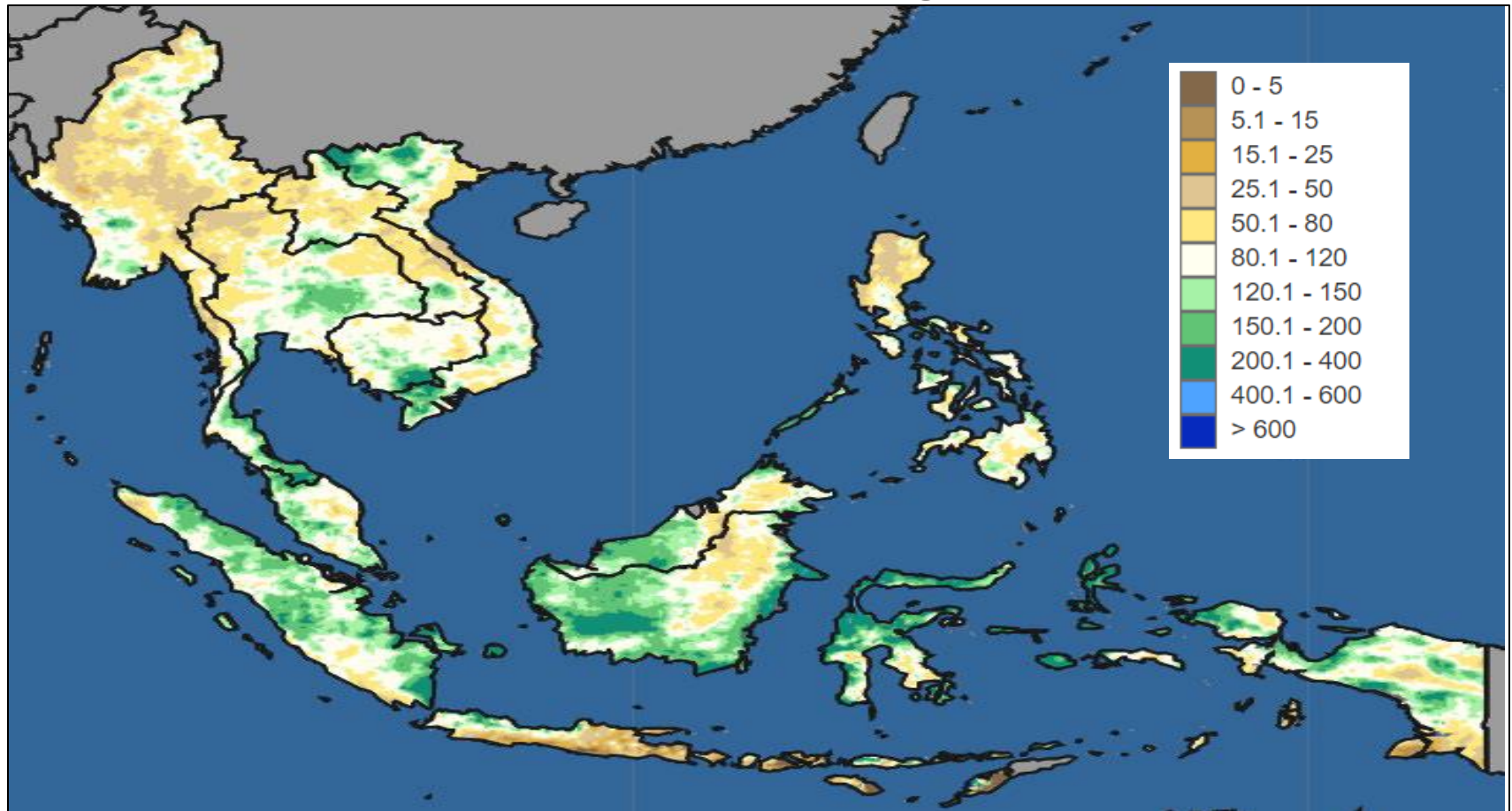


Source: USDA, Foreign Agricultural Service, International Production Assessment Division.



SOUTHEAST ASIA: Welcoming rains throughout the Southeast Asia rice belt benefited later-planted rice. In Burma, rains rebounded from early main-season dryness. However, rainfall is still below average in Burma's Delta Region, the country's main rice growing region.

Percent of Normal Rainfall (Aug 29 –Sep 27, 2020)

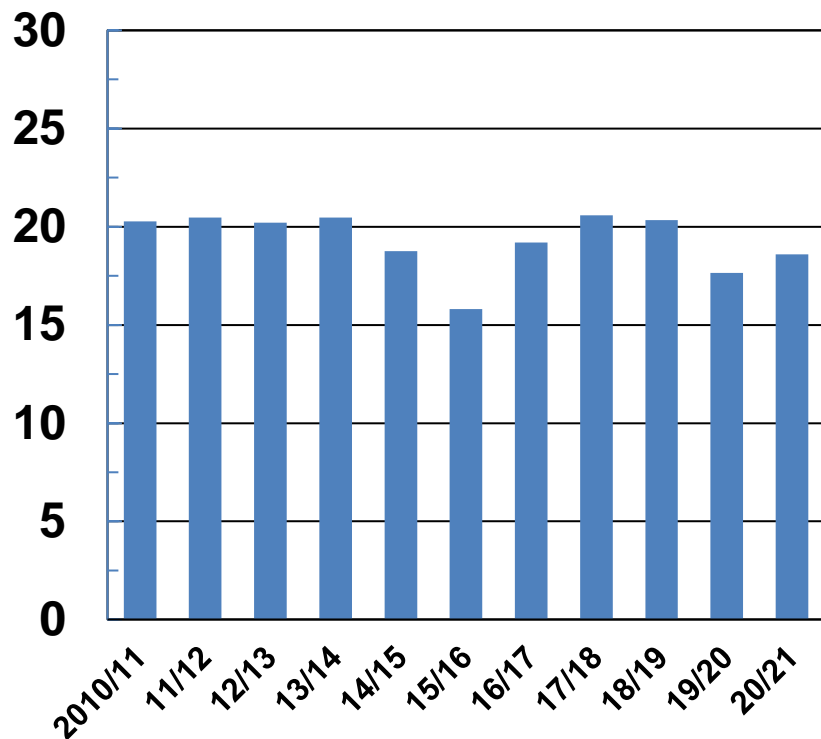


Source: USDA, Foreign Agricultural Service, International Production Assessment Division.



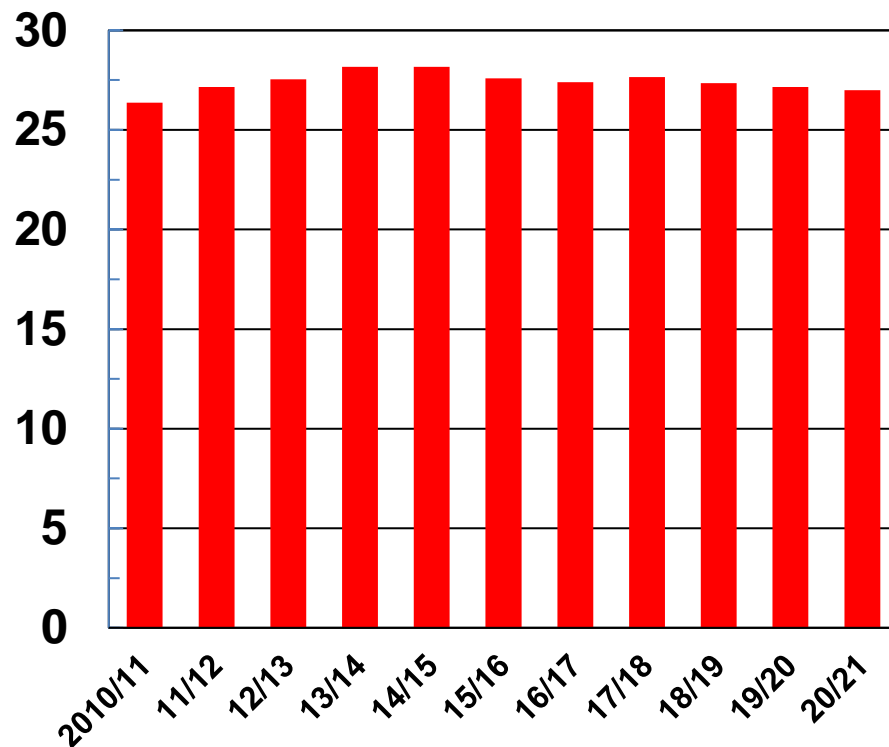
Thailand's 2020/21 Crop Projected to Partially Recovery from Drought; Vietnam's to Remain Below Record

Mil. Tons



THAILAND

Mil. Tons



VIETNAM

Milled Basis. 2020/21 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.

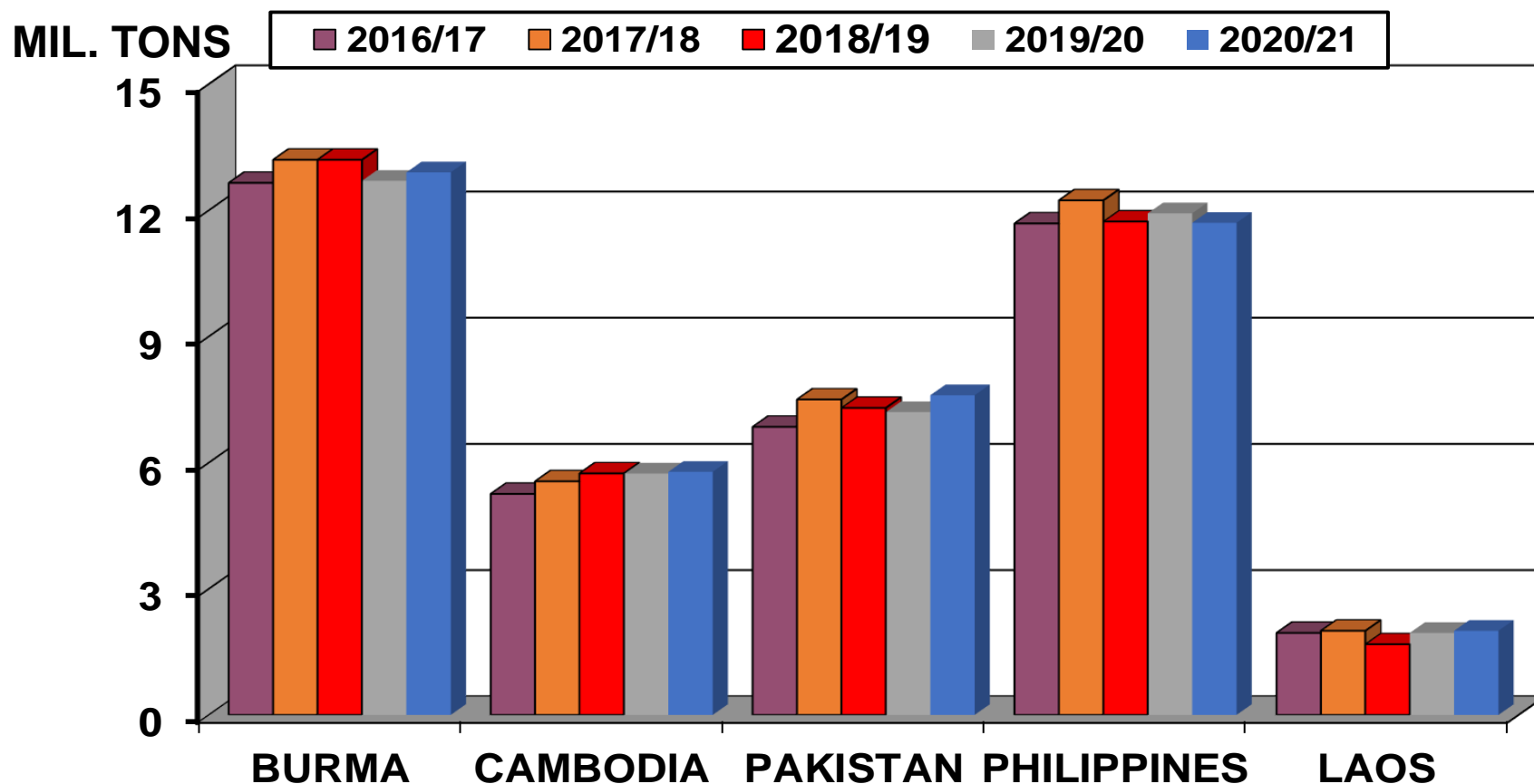


Economic Research Service

www.ers.usda.gov



Partial Recovery Projected for Burma's 2020/21 Crop; Philippines' Crop Slight Decline; Pakistan's Crop Record



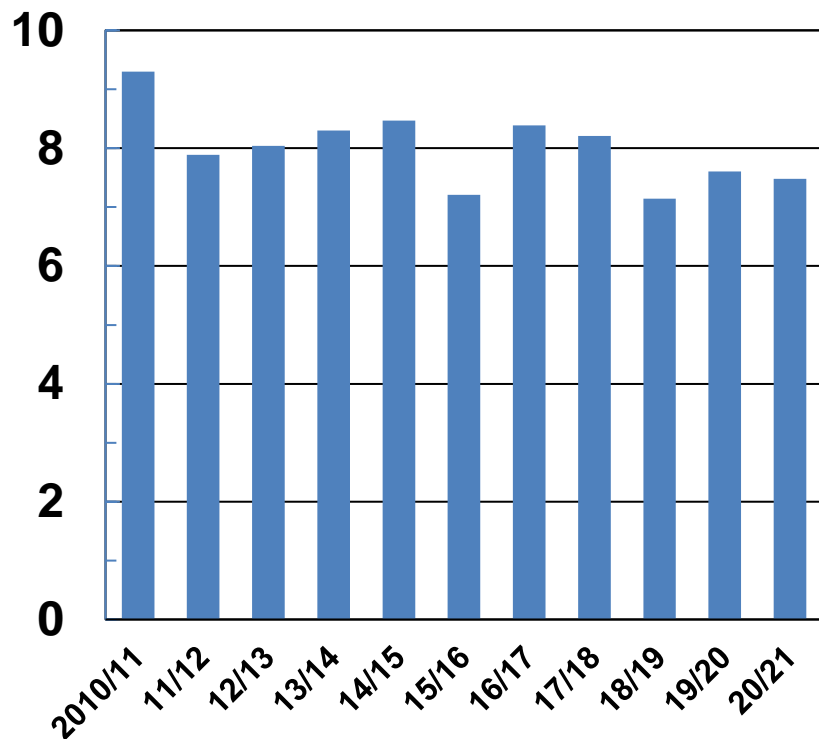
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Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



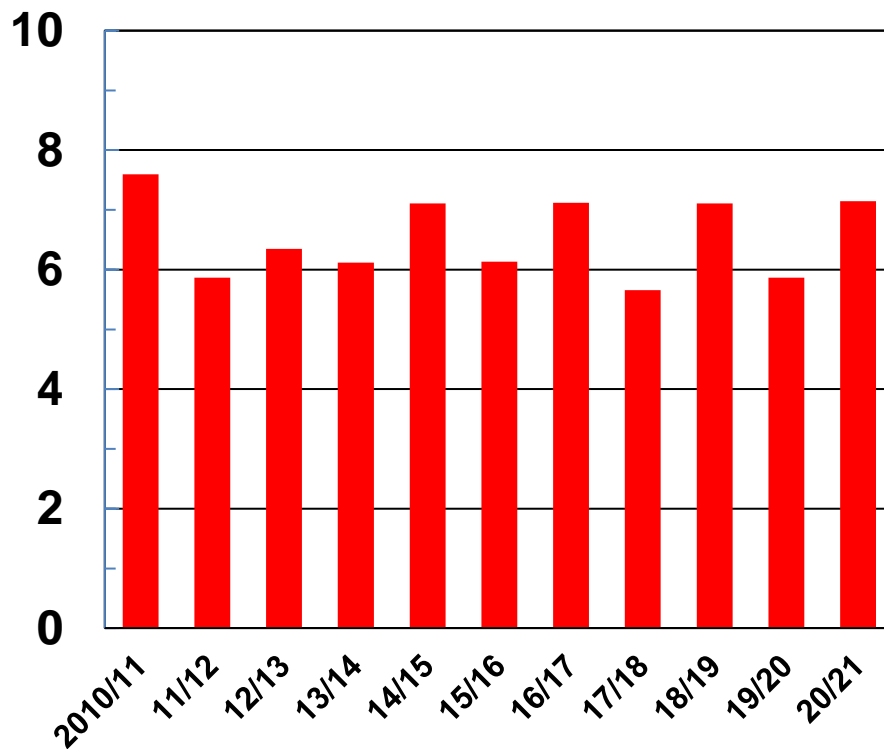
WESTERN HEMISPHERE: Brazil's Rice Crop Expected to Decline Slightly in 2020/21; U.S. Crop To Sharply Rebound

Mil. Tons



BRAZIL

Mil. Tons



UNITED STATES

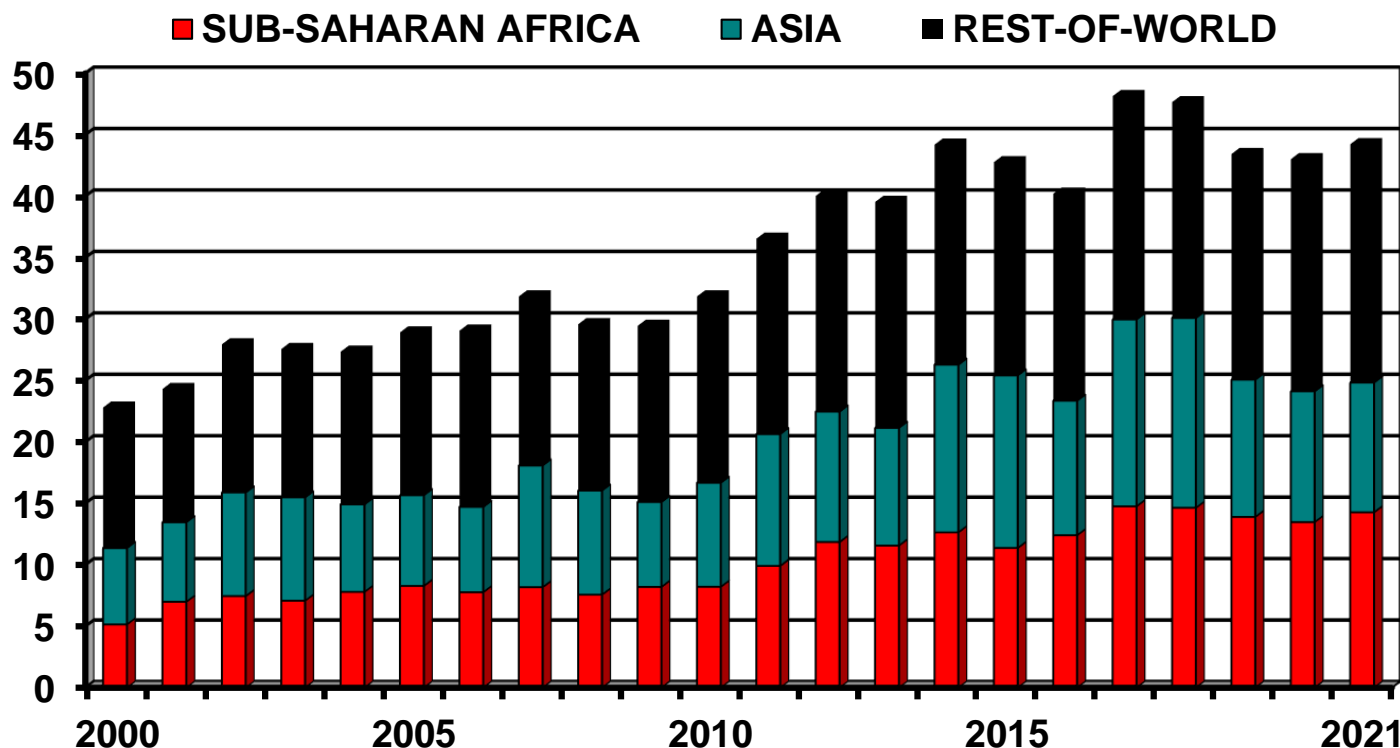
Milled Basis. 2020/21 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



Global Rice Trade Is Projected Higher in 2021; Sub-Saharan Africa to Remain Largest Importing Region

MIL. TONS



Milled basis. 2020 and 2021 forecasts.

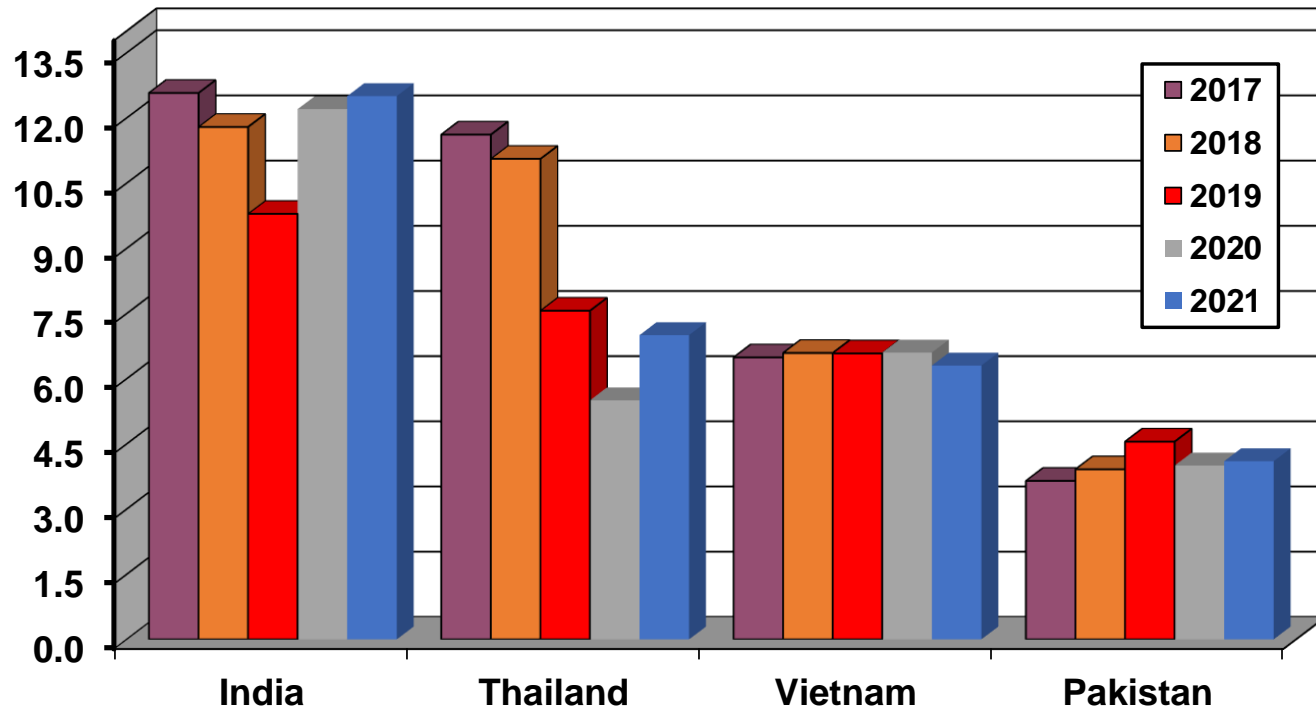
Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



India Is Projected To Remain the Number 1 Rice Exporter in 2021; Thailand's Exports To Remain Low

MIL. TONS

Top Four Rice Exporters



Milled basis. 2020 and 2021 forecasts. .

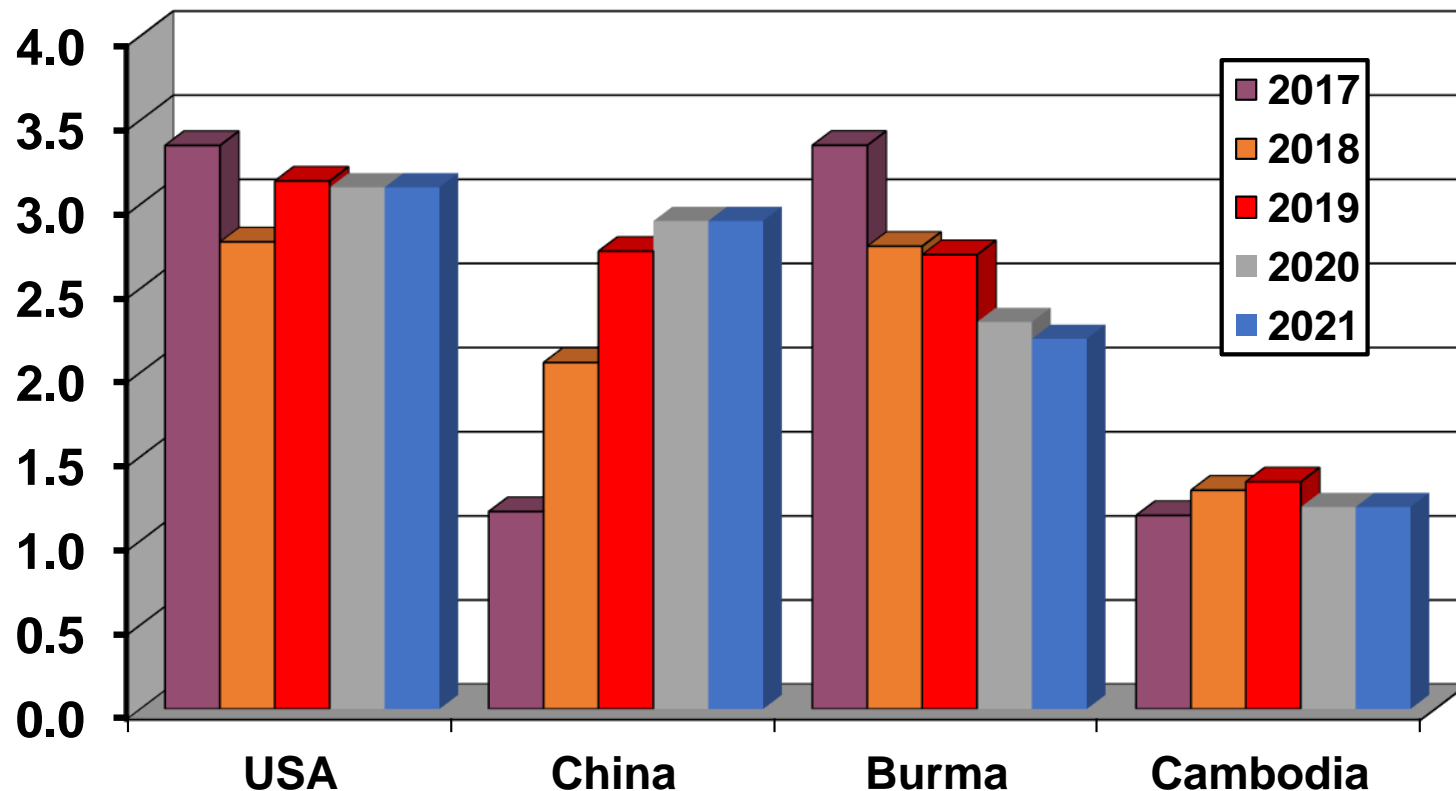
Source: USDAS, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



Burma's Rice Exports Projected To Continue To Decline in 2021; China's Exports to Remain Strong

MIL. TONS

Next 4 Major Rice Exporters



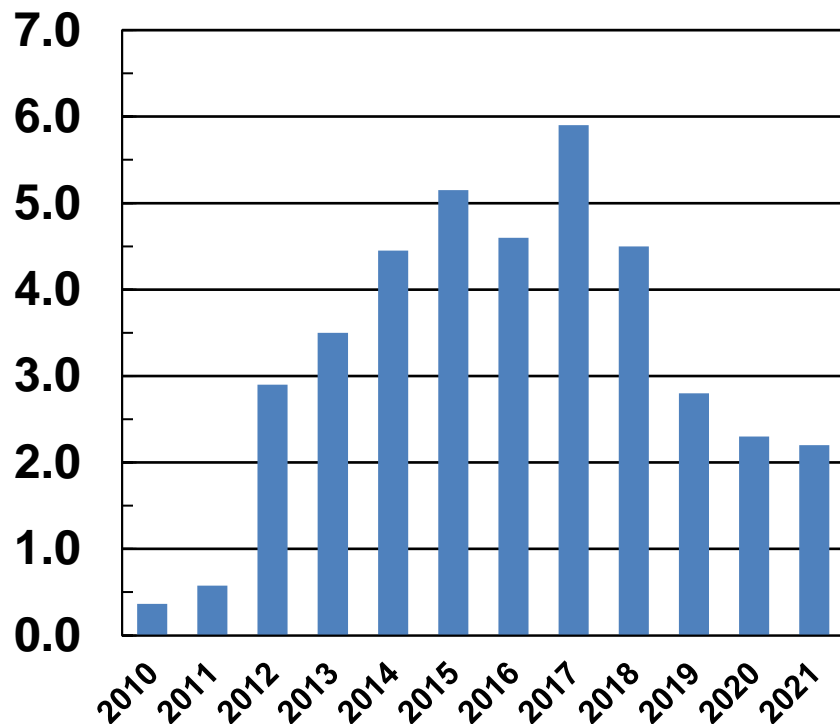
Milled basis. 2020 and 2021 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



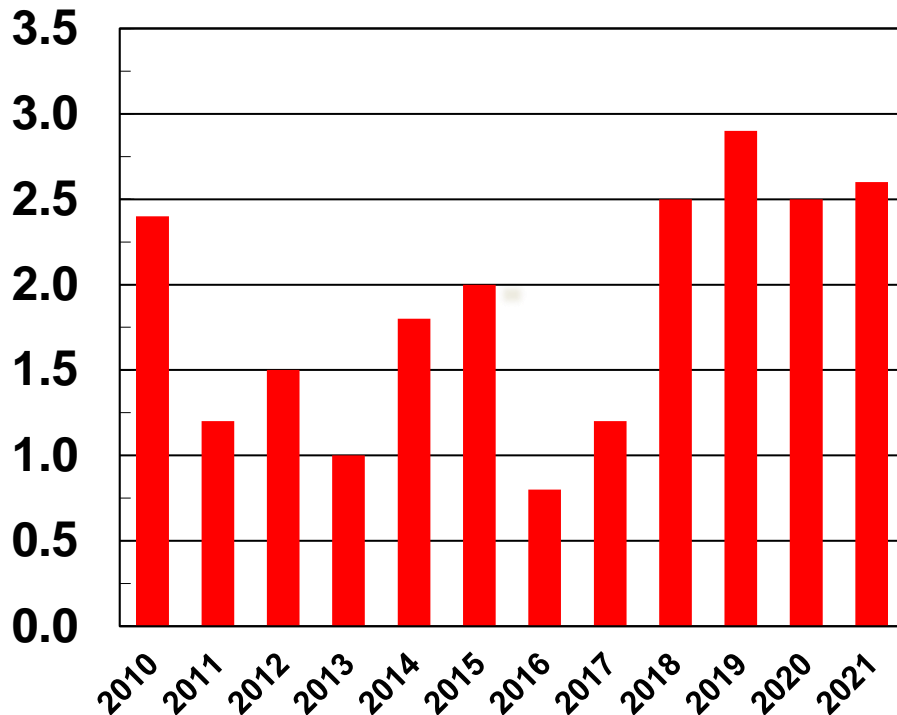
China's Rice Imports Projected To Remain Below 2017 Record; Philippines' Imports Projected Up Slightly

Mil. Tons



CHINA

Mil. Tons



THE PHILIPPINES

Milled Basis. 2020 and 2021 forecasts.

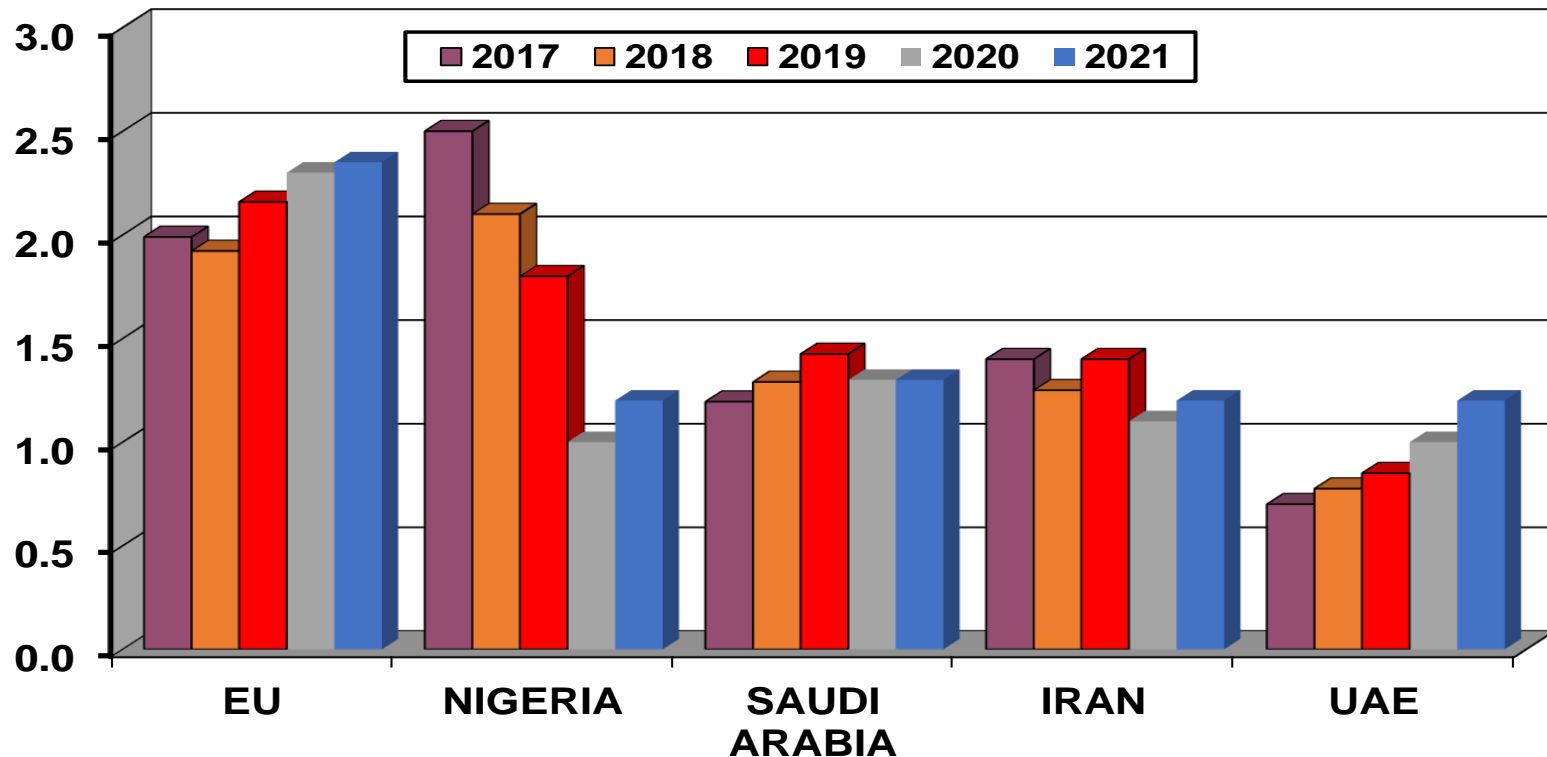
Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



EU Rice Imports Projected to Continue Rising in 2021; Nigeria's Imports Projected to Remain Below Historic Levels

MIL. TONS

Other Major Rice Importers



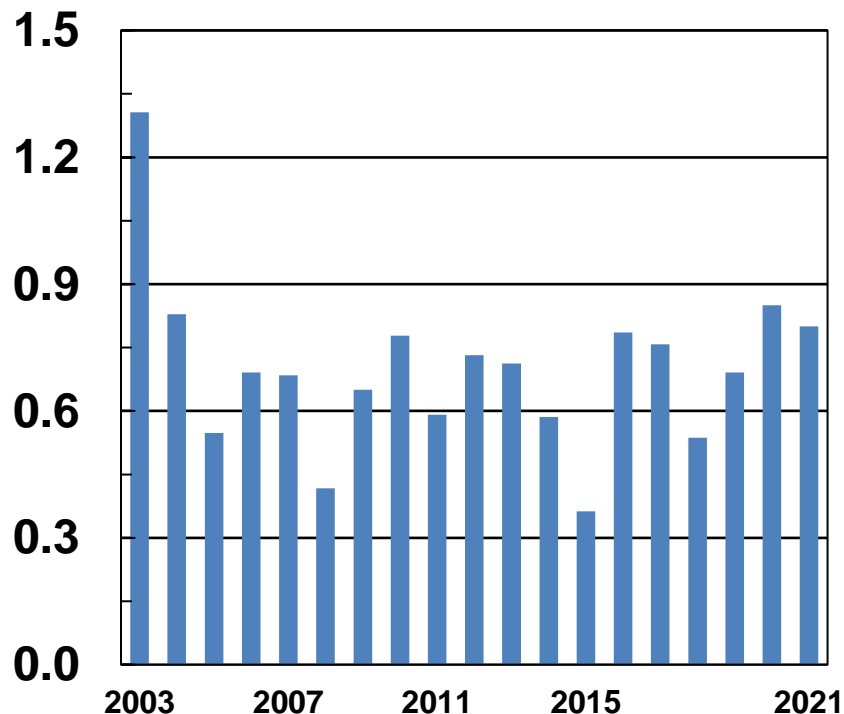
Milled basis. 2020 and 2021 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



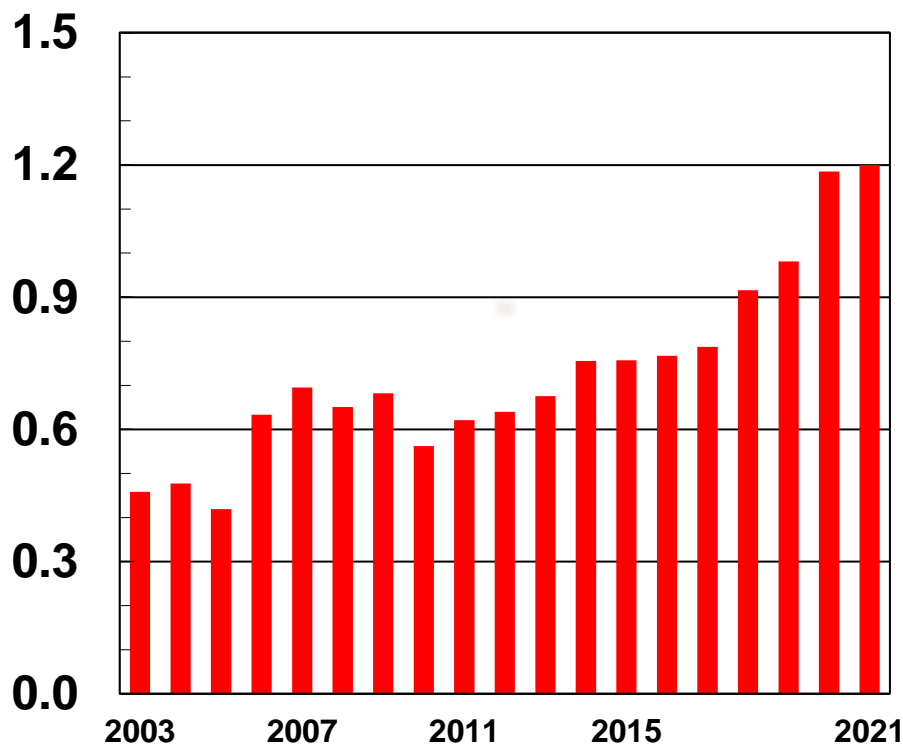
WESTERN HEMISPHERE: Brazil's 2020 Imports Are Highest Since 2003; U.S. 2021 Imports Projected at Another Record

Mil Tons



BRAZIL

Mil. Tons



UNITED STATES

Milled Basis. 2020 and 2021 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.

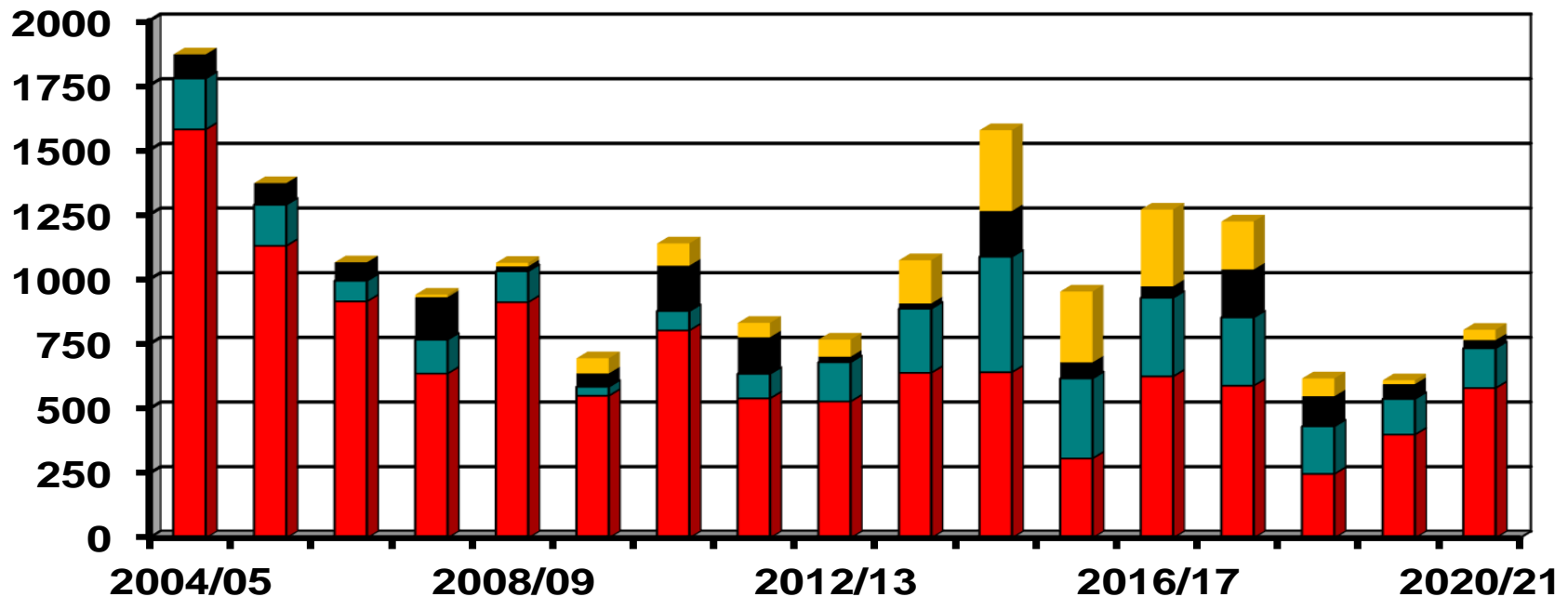


MERCOSUR: Rice Ending Stocks in 2019/20 were the Lowest Since 1997/98; Stocks Projected Tight in 2020/21

1,000 TONS

MERCOSUR RICE EXPORTERS

■ BRAZIL ■ ARGENTINA ■ URUGUAY ■ PARAGUAY



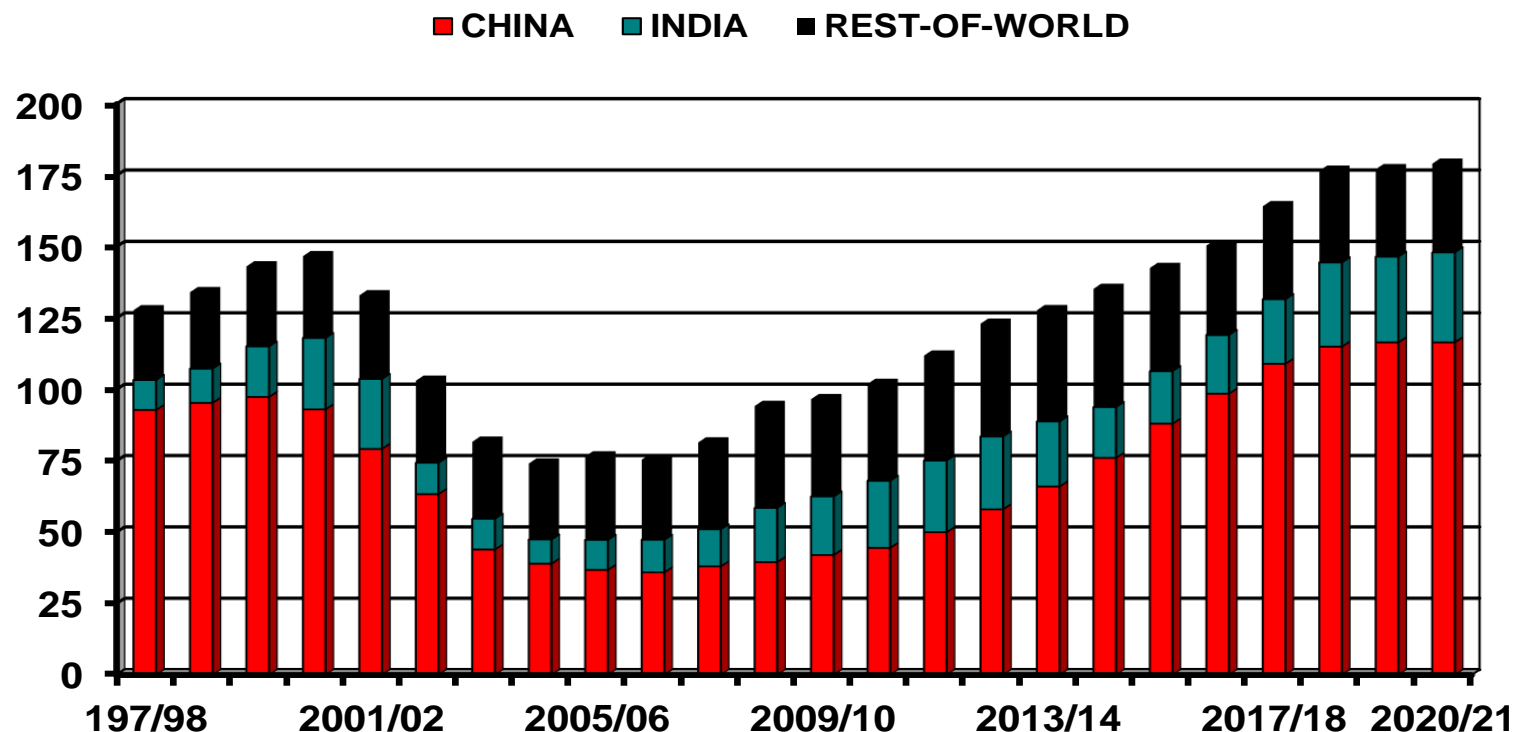
Milled basis. 2020/21 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



Global Ending Rice Stocks Projected at 14th Consecutive Record High; China and India to Again Hold the Bulk

MIL. TONS



Milled basis. 2020 and 2021 forecasts.

Source: USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.



The 2020/21 Global Rice Market:

Summary

- Record **global supplies** led by bumper crops in **South Asia** and some crop recovery in **Southeast Asia**.
- Global **consumption and residual use** projected record high, with growth led by **China** and **India's** domestic use still boosted by its pandemic-related food relief program.
- Global **trade** is projected to increase 3 percent in 2021 from the 2020 pandemic-limited level but remains well below record.
- Exportable supplies in **MERCOSUR** are projected to remain extremely tight until harvest next spring, supporting expanded **U.S. exports** to Latin America.
- Global ending **stocks** are projected to be **record high**.

