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Rice Outlook: April 2022
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Rice Outlook monthly tables, in Excel format, can be found on the Rice Outlook report page on USDA's Economic Research Service website.

U.S. 2022/23 Rice Plantings Indicated at 2.45 Million Acres

U.S. rice growers in March indicated they would plant 2.45 million acres of rice in 2022/23, down 3 percent from a year earlier. Growers indicated weaker plantings for both long-grain and combined medium- and short-grain rice, with medium- and short-grain plantings showing the largest drop. Plantings were intended lower in all reported States except Louisiana, with California reporting the largest decline. There were no revisions to the 2021/22 U.S. all-rice balance sheet this month. However, there was a 2.0-million cwt shift in domestic and residual use from medium- and short-grain to long-grain, with ending stocks for both classes of rice revised to reflect the April domestic and residual use forecasts. Season-average farm price forecasts (SAFP) for 2021/22 were lowered for both long-grain and southern medium- and short-grain rice, which reduced the all-rice SAFP 20 cents to \$15.70 per cwt.

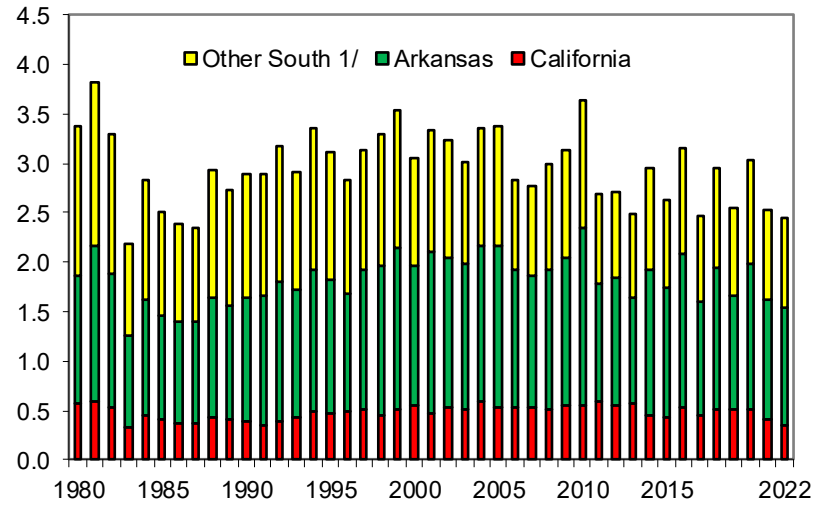
The 2021/22 global rice production forecast was lowered 1.0 million tons to 513.0 million tons (milled basis), still the highest on record. Downward production revisions were made this month for Brazil, Colombia, the European Union, Indonesia, and Mexico, while production projections for Peru and Venezuela were raised. Global rice consumption and residual use in 2021/22 is projected to be a record 511.2 million tons, up 0.1 million tons from the previous forecast. Global ending rice stocks are forecast at a record 188.8 million tons, 1.7 million below the previous forecast but still 1.8 million tons above a year earlier.

Global rice trade in calendar year 2022 is projected at a record 52.5 million tons (milled basis), up more than 1.1 million tons from the previous forecast, with export forecasts raised for Burma, India, Pakistan, and Thailand. Import forecasts for 2022 were raised for China, the European Union, and Vietnam. Over the past month, quotes for Thailand's trading prices for most grades of regular (nonspecialty) milled rice were virtually unchanged. U.S. price quotes for milled rice were also unchanged. In contrast, price quotes for Vietnam's rice for the winter-spring crop currently being harvested increased about 4 percent.

Figure 1

U.S. growers indicated California's 2022 rice plantings to be the smallest since 1983; Southern plantings down slightly

Million acres



1/ Louisiana, Mississippi, Missouri, and Texas. Source: USDA, Economic Research Service, *Rice Yearbook* dataset; 1980-2021; USDA, National Agricultural Statistics Service, March 2022 *Prospective Plantings*, 2022.

Domestic Outlook

U.S. 2022/23 Rice Plantings Indicated Down 3 Percent

U.S. rice growers in March reported that they intend to plant 2.45 million acres of rice in 2022/23, a decline of 80,000 from a year earlier. By class, growers indicated long-grain plantings at 1.94 million acres, a decline of almost 1.4 percent from a year earlier. Almost all U.S. long-grain rice is grown in the South. Combined medium- and short-grain plantings are indicated at 509,000 acres, a decline of more than 9-percent from the 2021/22 level, which was also reduced by severe drought in California, and would be the lowest since at least 1972/33 when USDA's National Agricultural Statistics Service (NASS) first began reporting U.S. rice plantings by class.

The bulk of the U.S. medium- and short-grain crop is grown in California, where the rice growing region is in its second consecutive year of a severe drought. Despite expectations of a second-consecutive weak California rice harvest in 2022/23, southern rice growers indicated only a 7,000-acre area expansion in medium- and short-grain acreage to 169,000 acres, the second-lowest southern medium- and short-grain rice plantings since 2013/14.

Growers in all States except Louisiana indicated weaker rice plantings in 2022/23. By State, California's rice plantings are indicated to drop almost 15 percent to 348,000 acres, the lowest since 1983/84 and the second consecutive year of a drought-induced sharp area decline. In the Delta, Arkansas growers indicated 2022/23 rice plantings at 1.19 million acres, a decline of nearly 2 percent from 2021/22, with plantings specified lower for both long-grain and medium- and short-grain rice. Long-grain is the dominant class of rice grown in Arkansas, with the State accounting for more than half of all U.S. long-grain plantings. Arkansas typically accounts for more than two-thirds of southern medium- and short-grain rice, with Louisiana accounting for most of the remainder. In nearby Mississippi, growers indicated 2022/23 rice plantings at 100,000 acres—all long-grain, a decline of almost 5 percent from a year earlier and the lowest since 1973/74. Missouri's growers indicated 2022/23 rice plantings at 189,000 acres, down 5 percent from a year earlier, with the bulk of this acreage long-grain. The intended decline in rice acreage in the Delta is largely due to the recent sharp increase in input prices—especially for fertilizer and fuel—and the recent rapid rise in soybean and corn prices, the main alternative crops for Delta rice growers.

On the Gulf Coast, Louisiana's rice growers indicated 2022/23 plantings at 440,000 acres, an increase of almost 5 percent from a year earlier. Plantings of both long-grain and medium-grain were specified higher. Long-grain typically accounts for almost 90 percent of Louisiana's rice acreage. In Texas, growers indicated 2022/23 rice plantings at 184,000 acres, down more than 3 percent from a year earlier. Similar to Missouri, Texas grows mostly long-grain rice. Gulf Coast rice growers have fewer alternative cropping options than rice growers in the Delta.

These intended plantings were reported by NASS in its *Prospective Plantings* survey results released on March 31. The intended acreage estimates in the report are based primarily on surveys conducted during the first 2 weeks of March. NASS will conduct a survey of actual plantings in June that will be released on June 30 in the *Acreage* report. Actual plantings often differ from intended plantings due to weather conditions and relative price changes.

Progress of the 2022/23 U.S. Rice Crop Slower Than Normal

Planting of the 2022/23 U.S. rice crop began in earnest by mid-March on the Gulf Coast and had just begun in parts of Delta by the start of April. On the Gulf Coast, Louisiana's rice crop was reported 49 percent planted by April 3, behind both the 58 percent reported a year earlier and the State's 5-year average of 62 percent. Louisiana experienced a cold snap in early March that briefly delayed plantings. In addition, saltwater intrusion remains a concern for growers in the lower parishes, with more rainfall needed to support plantings this year. In Texas, 43 percent of the 2022/23 rice crop was reported planted by April 3, down from 56 percent a year earlier and 7-percentage points behind the State's 5-year average. Much-needed rainfall briefly slowed Texas plantings in late March.

In the Delta, 2 percent of the Arkansas crop was planted by April 3, unchanged from a year earlier but 4 percentage points behind the State's 5-year average. Mississippi's rice crop was reported 3 percent planted by April 3, also unchanged from a year earlier but 4 percentage points behind the State's 5-year average. Plantings had not yet begun in Missouri or California, who typically plant later than the Gulf Coast, lower Delta, and California.

By April 3, the Louisiana crop was reported 33 percent emerged, 1 percentage point ahead of a year earlier but 1 percentage point behind the State's 5-year average. In Texas, 12 percent of the 2022/23 rice crop had emerged by April, well behind the 30 percent reported a year earlier and 10 percentage points behind the State's 5-year average.

U.S. 2022/23 Rice Supply Projected To Decline 8 Percent

There were no revisions to the U.S. 2021/22 rice supply forecasts this month. Total supply of all rice remains forecast at 266.0 million cwt, down 8 percent from a year earlier, a result of a smaller crop and weaker imports more than offsetting a much smaller carryin. Long-grain total supplies remain forecast at 198.4 million cwt, almost 8 percent below a year earlier, mostly due to a big production decline. Combined medium- and short-grain total supply remains forecast at 65.1 million cwt, down more than 10 percent from a year earlier and lowest since 2008/09, a year in which the U.S. medium- and short-grain season-average rough-rice price was the highest on record.

All-rice imports remain forecast at 30.5 million, more than 10 percent below a year earlier and the smallest since 2018/19, the last full market year prior to the onset of the COVID-19 pandemic. This year's weaker import forecast is largely due to the global container shortage, historically high freight costs, and other supply-related constraints.

U.S. 2021/22 long-grain imports remain forecast at 24.0 million cwt, 12 percent below a year earlier and the lowest since 2018/19. Through February 2022, the United States imported 462,833 tons (actual shipment weight) of long-grain rice, down 11 percent from a year earlier. In February, the United States imported 74,716 tons of long-grain rice, down 13 percent from a month earlier but still the second highest since start of the 2021/22 market year in August.

From August 2021 to February 2022, Thailand shipped 306,108 tons of long-grain rice to the United States, up almost 10 percent from a year earlier. Thailand remains the largest supplier of long-grain rice to the United States, almost all of it Thailand's premium jasmine rice, an aromatic. In contrast, number two U.S. long-grain supplier India shipped 98,273 tons to the United States from August 2021 to February 2022, down almost 18 percent from a year earlier.

Almost all U.S. long-grain imports from India are its premium basmati rice, also an aromatic. Like most Asian exporting countries, India's agricultural export sector is facing reduced availability of containers and ships that has resulted in a dramatic rise in shipping rates, as well as leading to port congestion and increased processing time for shipping. Current number three U.S. long-grain supplier Pakistan shipped 14,833 tons of rice to the United States from August 2021 to February 2022, down more than 17 percent from a year earlier. Similar to India, almost all of Pakistan's long-grain exports to the United States are its premium basmati rice. Although the United States produces and markets several aromatic rice varieties, these are not the same varieties grown in Asia and have somewhat different consumer qualities.

Combined medium- and short-grain U.S. rice imports remain projected at 6.5 million cwt, 3 percent below a year earlier. The current forecast assumes that Puerto Rico will take at least one more shipment of around 21,000 tons before August 1. Puerto Rico typically imports three or four shipments of approximately 21,000 tons of medium- and short-grain rice annually, with China the primary supplier and India an occasional supplier. Thus far in 2022/22, Puerto Rico has taken two shipments from China, one that arrived in September and the other in January. In 2020/21, Puerto Rico imported four shipments of 21,000 tons of medium- and short-grain rice from Asia. Puerto Rico also imports smaller amounts of long-grain rice from Thailand.

For August 2021–February 2022, the United States, including Puerto Rico, imported 104,954 tons (actual shipment weight) of medium- and short-grain rice, up almost 2 percent from a year earlier. Thailand, India, and China are the top suppliers of medium- and short-grain rice to the United States, accounting for well over 90 percent of these U.S. imports. For the first 7 months of the 2021/22 marketing year, the United States imported 36,375 tons of medium- and short-grain rice from Thailand, down more than 3 percent from a year earlier. Most of the rice imported by the United States from Thailand is a specialty rice classified by the U.S. Census Bureau as medium- and short-grain. India shipped 15,006 tons of medium- and short-grain rice to the United States in August 2021–February 2022, down 53 percent from a year earlier, with much of the decline likely due to high freight costs, container shortages, and other supply chain disruptions. China shipped 42,729 tons of medium- and short-grain rice to the United States—almost all to Puerto Rico—for August 2021–February 2022, nearly double a year earlier, with the substantial increase largely due to the timing of annual shipments to Puerto Rico. Italy is the next-largest supplier of medium- and short-grain rice to the United States, shipping 2,024 tons for August 2021–February 2022, up almost 18 percent from a year earlier. Italy typically ships 3,500–4,000 tons of *arborio* rice each year to the United States and has been a consistent long-term supplier of medium- and short-grain rice.

The 2021/22 U.S. all-rice carryin remains estimated at 43.7 million cwt, more than 52 percent above the year-earlier abnormally low level. The 2021/22 long-grain carryin remains estimated at 29.7 million cwt, 76 percent larger than in 2020/21. The 2021/22 medium- and short-grain carryin remains estimated at 11.5 million cwt, 7 percent larger than a year earlier.

The U.S. 2021/22 rice crop remains estimated at 191.8 million hundredweight (cwt), 16 percent below a year earlier. The production decline is the result of reduced harvested area. At 2.49 million acres, harvested area was almost 17 percent below a year earlier, largely due to drought in California and excessive spring rainfall in the South. In contrast, the U.S. average yield remains estimated at 7,709 pounds, 90 pounds above a year earlier and the highest on record.

U.S. 2021/22 Milled-Rice Export Forecast at 52.0 Million Cwt

U.S. rice exports in 2021/22 remain projected at 86.0 million cwt, more than 8 percent below a year earlier and the smallest since 2000/01. This month's projection was largely based on monthly U.S. Bureau of the Census trade data through February, shipment and outstanding sales data through March 31 reported in the weekly *U.S. Export Sales*, and expectations regarding shipments and sales the remainder of the 2021/22 market year.

Long-grain exports in 2021/22 remain projected at 64.0 million cwt, nearly 2 percent smaller than a year earlier. The decline is primarily based on smaller supplies and higher U.S. prices. According to the U.S. Census Bureau, through February, the United States exported 1.48 tons of long-grain rice in 2021/22, up 3 percent from a year earlier. In February, the United States exported 180,220 tons of long-grain rice, down 21 percent from January. Mexico, Central America, Haiti, northern South America, Canada, and the Middle East remain the top markets for U.S. long-grain exports. In Latin America, the United States is facing increasing competition from South American exporters in several key markets, mostly a result of lower prices. Similar to U.S. rice, the rice exported from South America into these markets is considered high quality.

Combined medium- and short-grain U.S. exports in 2021/22 remain projected at 22.0 million cwt, 24 percent below 2020/21 and the lowest since 2006/07. According to *U.S. Export Sales*, through March 31, shipments of medium- and short-grain rice were almost 36 percent behind a year earlier, and outstanding sales were down more than 14 percent. Combined shipments and outstanding sales to Japan of 351,000 tons through March 31 were more than 7 percent behind a year ago, and, at 97,100 tons, combined shipments and outstanding sales to South Korea were 46 percent behind. These are the two largest markets for U.S. medium- and short-grain rice. Combined shipments and outstanding sales of medium- and short-grain rice of 57,900 tons to Jordan, the third largest market, through March 31 were 21 percent behind a year earlier.

The year-to-year decline in U.S. medium- and short-grain exports is based on expectation of few sales outside the core U.S. markets in Northeast Asia—Japan, South Korea, and Taiwan—where the bulk of U.S. medium- and short-grain exports are shipped. U.S. medium- and short-grain sales to the Middle East are expected to be lower than in 2020/21, with Jordan and Saudi Arabia the main buyers. The United States is not expected to sell any rice to North Africa. The tighter U.S. supplies of medium- and short-grain rice are expected to reduce exportable sales and have already boosted U.S. trading prices, further reducing sales. In addition, by late spring, Australia is expected to be in position to increase its exports due to a 42-percent increase in production. Australia is expected to increase its market share in Northeast Asia and Oceania. China has abundant supplies of extremely low-priced Government-held stocks of medium- and short-grain rice available for export, with North Africa, the Middle East, and Oceania the major market destinations, as well as Puerto Rico, a smaller medium- and short-grain market.

By type, U.S. rough-rice exports in 2021/22 remain projected at 34.0 million cwt, down almost 2 percent from a year earlier. Based on data from the weekly *U.S. Export Sales* through March 31, combined U.S. rough-rice shipments and outstanding sales were well behind a year earlier to Mexico, but well ahead to Colombia, El Salvador, and Guatemala. In addition, in 2021/22, the United States has yet to sell any rice to Brazil, compared with 120,000 tons of long-grain rough-rice shipped in early 2020/21. Brazil is an erratic buyer of U.S. rice, often going several years without any purchases. Almost all U.S. rough-rice exports are currently shipped to Latin America. Long-grain accounts for the vast majority of U.S. rough-rice exports.

U.S. milled-rice exports (milled-and brown-rice exports on a rough-rice basis) are projected at 52.0 million cwt, 12 percent below a year earlier and the lowest since 1973/74. The United States is expected to make few commercial sales of milled rice beyond Northeast Asia, Haiti, Canada, Iraq, Jordan, and Saudi Arabia. However, Mexico, although primarily a rough-rice market, regularly imports small quantities of U.S. milled rice. Exports of U.S. milled-rice are limited by lower-priced rice from Asia, as well as increased competition from several South American exporters.

Total domestic and residual use of rice in 2021/22 remains projected at 145.5 million cwt, almost 5 percent smaller than the year-earlier record. The year-to-year projected decline is based on smaller U.S. supplies—primarily a much smaller crop—which implies smaller post-harvest losses in marketing and milling and smaller imports. Although the all-rice domestic and residual use forecast was unchanged this month, there were shifts among the two classes largely based on the December-February implied use indicated by the March 1 stocks reported by NASS. Long-grain domestic and residual use is projected at 115.0 million cwt, up 2.0 million cwt from the previous forecast but still more than 4 percent below the year-earlier record. Combined medium- and short-grain domestic and residual use is projected at 30.5 million cwt, down 2.0 million cwt from the previous forecast and 6 below a year earlier.

U.S. Long-grain Ending Stocks Projection for 2021/22 Lowered

The above supply and use revisions result in a 2021/22 ending stocks forecast of 34.5 million cwt, unchanged from the previous forecast but 21 percent less than a year earlier. The all-rice stocks-to-use ratio remains projected at 14.9 percent, down from 17.7 percent a year earlier. Long-grain ending stocks are projected at 19.4 million cwt, down 2.0 million from the previous forecast and 35 percent below a year earlier. The long-grain stocks-to-use ratio is projected at 10.8 percent, down from 16.0 percent a year earlier. Combined medium- and short-grain ending stocks are projected at 12.6 million cwt, up 2.0 million cwt from the previous forecast and 10 percent larger than a year earlier. The 2021/22 medium- and short-grain stocks-to-use ratio is projected at 24.0 percent, up from 18.7 percent a year earlier.

Based on data reported in the March NASS *Rice Stocks*, U.S. stocks of rice (rough- and milled-rice stocks on a rough-rice basis) on March 1, 2022, are estimated at 98.4 million cwt, down 8 percent from a year earlier. By class, long-grain stocks on March 1 are estimated at 63.8 million cwt, down nearly 11 percent from a year earlier. Stocks of combined medium- and short-grain rice on March 1 are estimated at 32.3 million cwt, down almost 4 percent from a year ago. Stocks of broken kernel rice, not reported by class, are estimated at 2.2 million cwt, up 9.4 percent from a year earlier.

Rice stocks on March 1, 2022, are estimated to be smaller than a year earlier in all six reported States, with Arkansas accounting for more than half. In the Delta, rice stocks (rough- and milled-rice stocks on a rough-rice basis) on March 1 in Arkansas are estimated at 52.2 million cwt, down almost 3 percent from a year earlier. In nearby Missouri, rice stocks are estimated at 4.5 million cwt, declining 18 percent from a year earlier. Stocks in Mississippi on March 1 are estimated at 2.2 million cwt, a decrease of nearly 32 percent from a year earlier. On the Gulf Coast, Louisiana's rice stocks on March 1 are estimated at 7.5 million cwt, a decline of 10 percent from a year earlier. Rice stocks in Texas on March 1 are estimated at 3.6 million cwt, a decline of almost 19 percent. Finally, in California, rice stocks on March 1 are estimated at 27.3 million cwt, a decline 9 percent from a year ago.

There were several downward revisions this month to the 2021/22 U.S. season-average farm price (SAFP) forecasts. The revisions were largely based on NASS monthly reported cash prices and marketings through February and expectations regarding prices and marketings the remainder of the market year. The 2021/22 long-grain SAFP was lowered 20 cents to \$13.80 per cwt, still up \$1.20 from a year earlier. The southern medium- and short-grain SAFP forecast was lowered 40 cents to \$14.00 per cwt, still up \$1.00 from 2020/21 and the highest since 2014/15. The California medium- and short-grain 2021/22 SAFP remains forecast at \$25.00, unchanged from the previous forecast but up \$2.40 from 2020/21 and the highest since the 2008/09 record of \$27.40 per cwt. The U.S. 2021/22 medium- and short-grain SAFP forecast was lowered 10 cents to \$21.50 per cwt, still \$1.40 higher than a year-earlier. The 2021/22 U.S. all-rice SAFP is forecast at \$15.70 per cwt, down 20 cents from the previous forecast but \$1.30 above a year earlier.

International Outlook

Production Forecasts for 2021/22 Lowered for Indonesia and Brazil

Global rice production in 2021/22 is forecast at a record 513.0 million tons (milled basis), down 1.0 million tons from the previous forecast but 4.2 million tons larger than a year earlier. Downward production revisions were made this month for Brazil, Colombia, the European Union, Indonesia, and Mexico, while production projections for Peru and Venezuela were raised.

On an annual basis, Australia, Bangladesh, Cambodia, China, Cote d'Ivoire, India, Laos, Nigeria, Pakistan, Paraguay, Senegal, South Korea, Tanzania, and Thailand account for the bulk of the projected global production increase in 2021/22, with Australia, Bangladesh, China, India, and Thailand showing the largest year-to-year increases. India's 2021/22 projected rice production of 129.0 million tons is up 4.6 million tons from a year earlier and is the sixth consecutive record rice crop for India. China's 2021/22 projected production of almost 149.0 million tons is up 0.7 million tons from a year earlier and is also the highest on record. China and India are the two largest rice producing countries in the world and account for more than half of annual global rice production. Thailand's 2021/22 rice crop of 19.7 million tons is up more than 4 percent from a year earlier as the country has nearly recovered from drought and resulting low reservoir levels that limited rice production the 2 previous years. Australia's 2021/22 projected rice crop of 470,000 tons is up 42 percent from a year earlier, also a result of recovery from drought and low reservoir levels that sharply reduced rice production in 2019/20 and limited recovery in 2020/21.

In contrast, crops are projected to be smaller than a year earlier in Brazil, Colombia, Egypt, EU, Guyana, Indonesia, Iran, Iraq, Kazakhstan, Madagascar, Mali, Mexico, Russia, Sri Lanka, Turkey, the United States, Uruguay, and Vietnam. The United States and Egypt are projected to show the largest production declines in 2021/22. Egypt's crop is projected to decline 1.1 million tons in 2021/22 to 2.9 million due to a 29-percent reduction in harvested area to 0.5 million hectares. The area decline is the result of stricter enforcement of Government-mandated area limits implemented to conserve water. U.S. production of 6.1 million tons is 16 percent below a year earlier, also result of a contraction in harvested area. The U.S. rice-harvested-area decline was due to more favorable price expectations for corn and soybeans at planting time in the Delta, severe drought in California, and persistent rainfall nearly all spring in much of the South that reduced plantings.

Global rice consumption and residual use in 2021/22 is projected to be a record 511.2 million tons, up 0.1 million tons from the previous forecast and 7.7 million tons larger than a year earlier. Consumption and residual forecasts were raised this month for China, the Philippines, and Senegal. China's domestic and residual forecast was increased 0.6 million tons to a record 155.4 million. Both this month's upward revision and year-to-year increase for China are based on larger imports of broken kernel rice for nonfood uses, mostly as animal feed. India has supplied the bulk of these broken kernel imports, with Pakistan and Vietnam supplying smaller amounts. In contrast, consumption and residual use forecasts were lowered this month for Brazil, Indonesia, and Mozambique. India's 2021/22 domestic and residual use remains forecast at a record 103.5 million tons, up more than 2 percent from a year earlier.

Table A - Global rice production, selected monthly revisions and year-to-year changes, April 2022						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation and comments on year-to-year change or month-to-month revision
Rice production in 2021/22, 1,000 metric tons (milled basis)						
Brazil	7,140	-136	-10.8	↓	↓	Lowered the crop forecast based on a smaller harvested area estimate and a weaker yield. Harvested area was lowered 20,000 hectares to 1.65 million, 2 percent below a year earlier and smallest area since at least 1960/61. The average yield was lowered almost 1 percent 6.36 tons per hectare, down 9 percent from a year earlier and the weakest since 2018/19. Southern Brazil, where the bulk of Brazil's rice crop is produced, is experiencing a second consecutive year of severe drought.
Colombia	1,850	-54	-7.5	↓	↓	Crop forecast was lowered based on a smaller harvested area estimate and weaker yield. At 550,000 hectares, harvested area is 10,000 hectares below the previous estimate and 7 percent below a year earlier. The average yield of 4.95 tons per hectare is down 1 percent from the previous estimate and almost 1 percent below a year earlier. Much of the data and information for these revisions were provided by the U.S. Agricultural Office in Bogota.
European Union	1,840	-14	-4.5	↓	↓	Reduced the EU crop forecast based on reduced production estimates for France, Greece, Hungary, Romania, and Spain not fully offsetting a slight increase for Portugal. The revisions were largely based on data from the recent EU Consolidated Meeting.
Indonesia	34,400	-1,000	-0.3	↓	↓	Lowered the production forecast based on a smaller harvested area estimate. At 11.6 million hectares, total harvested is 230,000 hectares below the previous forecast but still almost 2 percent above the year earlier revised level. The 2021/22 average yield of 4.67 tons per hectare is down 1 percent from the previous estimate and 2 percent below a year earlier. The 2021/22 main-season harvest is currently taking place, a month earlier than the main-season harvest in 2020/21 that was rain-delayed. Frequent rainfall this year has limited the sunlight required during the flowering and grain filling stages, resulting in higher-than-normal amounts of empty husks and high moisture content for harvested paddy. Rice farmers this year also face the same fertilizer constraints as corn farmers, with some not receiving allocated subsidized fertilizers on time, resulting in fewer applications to crops. The revisions are largely based on data provided by the U.S. Agricultural Office in Jakarta.
Mexico	183	-10	-9.0	↓	↓	Reduced the crop forecast based on a smaller harvested area estimate. At 42,000 hectares, rice harvested area is 3,000 hectares below the previous estimate and almost 11 percent below a year earlier. The yield forecast was raised slightly to 6.33 tons per hectare, almost 2 percent above a year earlier. Much of the data and information for these revisions was provided by the U.S. Agricultural Office in Mexico City.
Peru	2,396	161	1.4	↑	↑	Production forecast was raised based on a higher yield estimate and slightly larger harvested area. The yield estimate was raised almost 6 percent to 8.35 tons per hectare, almost 2 percent above a year earlier and the highest on record. The revised estimates are based on recently released data from Peru's Ministry of Agriculture.
Venezuela	163	11	9.4	↑	↑	Raised the crop forecast based on a higher yield estimate. At 4.0 tons per hectare, the average yield is up 7 percent from the previous estimate and 9 percent higher than a year earlier. Poor planning and management practices continue to limit rice production in Venezuela, despite this year's yield improvement. State provided fertilizer helped this year, but inputs remain expensive.
Rice production in 2020/21, 1,000 metric tons (milled basis)						
European Union	1,926	-25	-3.2	↓	↓	Lowered the EU production estimate based on smaller crop estimates for Greece, Romania, and Spain not fully offsetting a higher estimate for Portugal.
Indonesia	34,500	-800	-0.6	↓	↓	Lowered the production estimate based on a smaller harvested area estimate. At 11.4 million hectares, harvested area is 400,000 hectares below the previous estimate and almost 2 percent below a year earlier. The decline in harvested area in 2020/21 was the result of a prolonged rainy season, combined with attractive prices for corn, that encouraged some rice farmers on lowland, semi-irrigated areas to switch from growing paddy to corn. Farmers on upland, rain-fed areas also opted to grow corn during the second and third crop cycles for the same reasons. Much of the data and information for these revisions was provided by the U.S. Agricultural Office in Jakarta.
Peru	2,363	-9	7.3	↓	↑	Lowered the production estimate based on a fractionally smaller harvested area estimate and fractionally reduced yield reported by Peru's Ministry of Agriculture.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, Supply, and Distribution database.

On a year-to-year basis, Bangladesh, Brazil, Burma, Cambodia, China, Colombia, Cote d'Ivoire, Cuba, Ethiopia, Ghana, Guinea, India, Iraq, Liberia, Mozambique, Nepal, Nigeria, Pakistan, the Philippines, Saudi Arabia, Senegal, Sri Lanka, Tanzania, Thailand, Togo, the United Arab Emirates, the United Kingdom, and Vietnam account for the bulk of the expected increase in global rice consumption and residual use in 2021/22. In contrast, consumption and residual use is projected to decline in 2021/22 in Egypt, Indonesia, Iran, Mali, South Korea, and the United States. The decline in South Korea is due to continued long-term shifts in diet away from rice to a more a Western diet and to only negligible population growth. Egypt's decline is based on a much smaller crop and resulting tighter supplies, despite record imports. The projected decline in the United States is based on a much smaller crop, which indicates a smaller residual use that includes post-harvest losses. Mali's reduction is based on smaller supplies.

In 2021/22, global ending rice stocks are forecast at a record 188.8 million tons, 1.7 million below the previous forecast but still 1.8 million tons above a year earlier. Ending stocks forecasts were lowered this month for Bangladesh, Burma, Colombia, the European Union, India, Indonesia, Japan, Mexico, Pakistan, and Thailand, but raised for Brazil, Peru, and Vietnam. India accounts for the bulk of the expected increase in global ending rice stocks in 2021/22. At a record 41.5 million tons, India's ending stocks are 4.5 million tons above a year earlier. In contrast, China's ending stocks are projected to decrease 3.5 million tons to 113.0 million. In 2021/22, China is projected to account for 60 percent and India for 22 percent of global ending rice stocks. The 2021/22 global stocks-to-use ratio is projected at 36.9 percent, down from 37.1 percent in 2020/21.

Export Forecasts for 2022 Raised for Burma, India, Pakistan, and Thailand

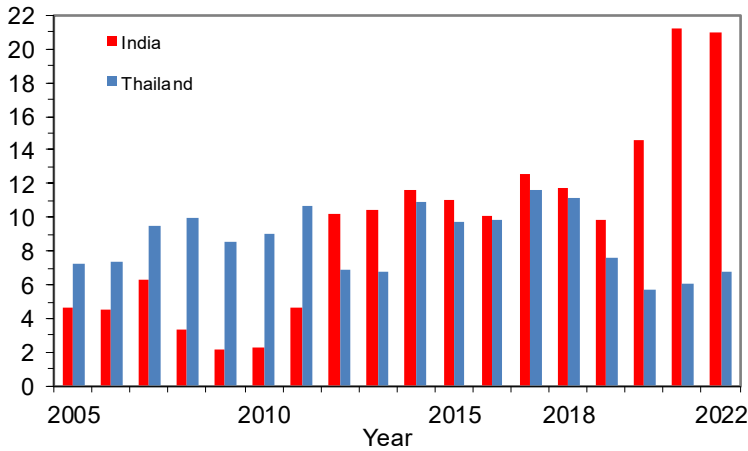
Global rice trade in calendar year 2022 is projected at a record 52.5 million tons (milled basis), up more than 1.1 million tons from the previous forecast and almost 2 percent larger than a year earlier. Thailand and Pakistan account for the largest share of the expected increase in global rice exports in 2022, with Australia, Burma, and Uruguay also expected to export more rice in 2022. In contrast, Cambodia, China, India, and the United States are expected to export less rice in 2022, with Cambodia projected to show the largest decline in shipments.

On the global import side, imports are projected to increase in 2022 by Brazil, China, Colombia, Cuba, Egypt, Ethiopia, European Union, Haiti, Indonesia, Iran, Madagascar, Mali, Nepal, Nigeria, Saudi Arabia, Sri Lanka, Togo, Turkey, and the United Arab Emirates. Sri Lanka's imports are projected to increase 0.5 million tons to 0.65 million based on a smaller crop in 2021/22. Iran's imports are projected to increase 0.33 million tons from a year earlier's abnormally low level to 1.2 million tons. China's 2022 imports are projected at 5.2 million tons, up almost 0.3 million tons from a year earlier. China remains the largest rice importing country in the world. The remaining projected import expansions for other countries in 2022 are smaller.

Figure 2

India's 2022 rice exports projected near-record; Thailand's 2022 exports projected to increase 12 percent

Million tons



Notes: Rice exports are reported on a milled basis; 2022 are forecasts.

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

In contrast, Bangladesh's imports are projected to drop almost 2.2 million tons to 0.5 million due to a bumper crop and rising supplies. Vietnam's imports are projected to decline 1.0 million tons to 0.8 million from last year's abnormally large record high of 1.8 million tons. The bulk of Vietnam's imports have historically been border shipments from Cambodia, with Vietnam taking mostly rough rice. In 2021, however, Vietnam imported large quantities of broken-kernel rice from India for feed use, food processing, and beer, as well as whole-grain rice from India. Vietnam also imported around 1.0 million tons of rice from Cambodia—a record high. These purchases are expected to be much smaller in 2022, although Vietnam continues to import broken from India. Imports are also projected to decline in 2022 for Ghana, Guinea, and Senegal.

Table B - Selected rice importers at a glance (1,000 metric tons), April 2022						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice importers, 2022						
Bangladesh	500	-100	-81.1	↓	↓	Import forecast was lowered based on a slower-than-expected pace of purchases during the first two months of 2022. India supplies the bulk of Bangladesh's rice imports.
Brazil	800	150	16.8	↑	↑	The import forecast was raised based on a reduced 2021/22 rice production forecast.
China	5,200	500	5.7	↑	↑	Import forecast was raised based on a stronger-than-expected pace of purchases through February. Broken account for much of the increase in imports so far in 2022, with India and Pakistan providing the bulk of these shipments. Most of the broken are imported for non-food uses, primarily for animal feed. Thailand and Burma are also major suppliers of rice to China, shipping mostly whole-grain milled rice, but some broken as well.
EU	2,100	175	15.4	↑	↑	The import forecast was raised based on expectations of an increase in imports from Burma and Cambodia after the removal of the EU safeguard measures on these two exporters in January. The safeguard measures were reinstated in January 2019 to protect EU rice producers from a surge in low-priced rice from Burma and Cambodia--both designated as Least Developed Countries--that was imported duty free under the Everything But Arms agreement.
Indonesia	750	150	15.4	↑	↑	The import forecast was raised largely based on a reduced crop estimate for 2021/22.
Philippines	3,000	100	1.7	↑	↑	Import forecast was raised based on a stronger-than-expected pace of purchases in January and February. Vietnam remains the largest supplier of rice to the Philippines.
Vietnam	800	200	-55.6	↑	↓	The import forecast was raised based on a stronger-than-expected pace of purchases early in 2022. The bulk of Vietnam's rice imports have historically been rough (unmilled) rice from Cambodia. However, in 2021, Vietnam purchased more than 800,000 tons of rice from India, taking both whole-grain rice and broken kernels. In 2022, Vietnam has continued buying both whole-grain rice and broken kernel rice from India.
Rice importers, 2021						
Cameroon	600	20	20.0	↑	↑	The import estimate was raised based on yearend trade data. Imports are unchanged from the 2017 and 2019 record high. India was the largest supplier of rice to Cameroon in 2021.
EU	1,820	20	-6.2	↑	↓	Import estimate was raised based on revised EU Commission trade data. Pakistan and Burma were the largest supplier of rice to the EU in 2021. Guyana, India, Thailand, Cambodia, Uruguay, Argentina, and Paraguay were also major suppliers.
Indonesia	650	50	18.2	↑	↑	The import estimate was raised based on yearend trade data. India was the largest supplier of rice to Indonesia in 2021.
Jordan	210	10	-8.7	↑	↓	The import estimate was raised based on yearend trade data. The United States and India were the largest suppliers of rice to Jordan in 2021.
Qatar	153	-7	-32.6	↓	↓	The import estimate was lowered based on yearend trade data. India was the largest supplier of rice to Qatar in 2021.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, Supply, and Distribution database.

Table C - Selected rice exporters at a glance (1,000 metric tons), April 2022						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice exporters, 2022						
Burma	2,100	200	10.5	↑	↑	The export forecast was raised based on a stronger-than-expected pace of shipments to date. Thus far in 2022, the European Union has purchased more rice from Burma than previously expected, likely due to the removal of the EU import safeguards this January.
India	21,000	500	-0.9	↑	↓	Export forecast was raised based on a stronger-than-expected pace of shipments thus far in 2022. Shipments of broken kernel rice to China have been especially strong in 2022.
Japan	110	40	0.0	↑	→	The export forecast was raised based on stronger-than-expected shipments in 2021, with about 90,000 tons shipped as food aid and 20,000 tons shipped as commercial sales. Much of the data and information for these revisions were from the U.S. Agricultural Office in Tokyo.
Pakistan	4,350	200	10.7	↑	↑	The export forecast was raised based on a stronger-than-expected pace of shipments the first 3 months of the 2021/22 (November-October) market year. Shipments to China and the EU were especially strong.
Thailand	6,800	200	12.2	↑	↑	Export forecast raised based on a stronger-than-expected pace of shipments to date. Thailand's have particularly strong in 2022 to China, the United States, Iraq, South Korea, the Philippines, and Angola.
Rice exporters, 2021						
EU	413	-37	-23.9	↓	↓	Export estimate was lowered based on revised EU Commission trade data.
Japan	110	30	175.0	↑	↑	The export estimate was raised based on yearend trade data that reported about 90,000 tons shipped as food aid and about 20,000 tons shipped as commercial sales.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, *Production, Supply, and Distribution* database.

Over the past month, quotes for Thailand's trading prices for most grades of regular (non-specialty) milled rice were virtually unchanged from a month earlier, as a further weakening of the Thai baht offset impacts from inquires for white and parboiled rice from Sub-Saharan Africa buyers. Thailand's 100-percent Grade B long-grain milled rice for export was quoted at \$424 per ton for the week ending April 4, unchanged from the week ending March 7. Prices for Thailand's 5-percent broken parboiled rice—a specialty rice—were quoted at \$415 per ton for the week ending April 7, up \$1 from the week ending March 7. Prices for Thailand's jasmine rice—a premium aromatic—were quoted at \$744 per ton for the week ending April 4, down \$6 from the week ending March 7.

In contrast, price quotes for Vietnam's rice for the winter-spring crop currently being harvested increased about 4 percent from a month earlier, partly due to rising input and transportation costs, especially for gasoline and Diesel fuel. Demand for Vietnam's rice remains subdued as buyers in the Philippines are still waiting for the resumed issuance of phytosanitary import licenses. For the week ending April 5, prices for Vietnam's 5-percent broken-kernel long-grain milled rice were quoted at \$420 per ton, up \$15 from the week ending March 8. India's price quotes for 5-percent broken kernel rice declined \$5 per ton from the week ending March 8 to \$345 for the week ending April 5, remaining the most competitively priced source of Asian rice. Pakistan's price quote for 5-percent broken kernel rice increased \$15 per ton to \$360 over the same time.

Movements in South American exporter price quotes varied by source and grade and remain below U.S. price quotes for similar grades of milled rice. Uruguay's generic 5-percent broken-kernel long-grain milled rice remains quoted at \$545 per ton for the week ending April 5, unchanged from the week ending December 7. The price quote is \$85 per ton below the current U.S. price for long-grain milled rice for Latin American markets. In contrast, price quotes for higher priced nongeneric shipments from Uruguay declined \$10 per ton to \$590. Argentina's 5-percent broken remain quoted at \$495 per ton for the week ending April 5, unchanged since the week ending March 8. Prices for Brazil's generic 5-percent broken-kernel rice were quoted at \$560 per ton for the week ending April 5, up \$8 from the week ending March 8.

U.S. trading prices for long-grain milled rice were unchanged over the past month. Prices for U.S. long-grain milled rice, Number 2 Grade, 4-percent broken kernels (free on board a vessel at a Gulf port, Iraqi specifications) were quoted at \$665 per ton for the week ending April 5, unchanged from the week ending March 8. U.S. prices for Latin American milled-rice markets—Haiti, Colombia, and Mexico—remain quoted at \$630 per ton for the week of April 5, unchanged since late February.

Milled-rice prices in California were also unchanged over the past month. Prices for California Number 1 Grade, 4-percent broken kernels for the week ending April 5 remain quoted at \$1,220 per ton (free on board at a domestic mill, Mediterranean specifications), unchanged since late February. Export prices for California rice for delivery to the Port of Oakland, California, medium-grain milled-rice (Korean specifications) remain quoted at \$1,360 per ton for the week ending April 5, also unchanged since late February. These are the highest prices for U.S. medium-grain milled rice. For listings of trading prices by exporter and grade of rice, see table 9 in the Excel file.

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