



GIEWS Country Brief The Socialist Republic of Viet Nam

Reference Date: 17-July-2023

FOOD SECURITY SNAPSHOT

- Main 2023 winter/spring rice production estimated at near-average level
- Cereal import requirements in 2023/24 forecast at near-average levels
- Domestic prices of rice higher year-on-year in June 2023

Main 2023 winter/spring rice production estimated at near-average level

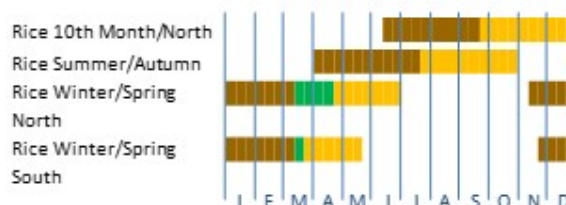
Harvesting of the 2023 main winter/spring rice crop, which is mostly irrigated and accounts for about 45 percent of the annual output, concluded in June and production is estimated at a near-average level of 20.2 million tonnes, up slightly from the 2022 level as yield increases offset a contraction in the area planted. Overall, the total area planted with rice has been on a steady decline since 2016, following a shift to other crops as well as to other purposes, such as housing and infrastructure. Planting of the 2023 summer/autumn rice crop, which accounts for about 35 percent of the annual output, is ongoing and harvesting of early planted crops started in July. Near-average amounts and well-distributed rainfall since April, and adequate irrigation water availability in the key rice producing areas of Mekong River Delta improved soil moisture levels and benefitted crop establishment and development. As of late June, remote sensing data shows average to above-average vegetation conditions throughout most parts of the country (NDVI map), inferring to favourable yield prospects for the summer/autumn crops. By contrast, below-average vegetation conditions are visible in the minor rice producing areas in northcentral and northeastern parts, following below-average rainfall amounts between April and June. Planting of the 2023 winter “10th month” rice crop, accounting for about 20 percent of the annual output, started in mid-June and is expected to continue until September.

Harvesting of the 2023 main winter/spring maize crop will finalize at the end of July and the output is forecast at a below-average level mostly due to a reduction in sowings as farmers preferred to grow more profitable vegetables, fruits and other cash crops. Overall, weather conditions were favourable benefitting yields, but recurrent dry spells between March and May affected crop development in parts of the important northern maize producing areas. Planting of the 2023 secondary summer/autumn maize crop, to be harvested from September, was completed in June under generally favourable moisture conditions.

Viet Nam

Crop Calendar

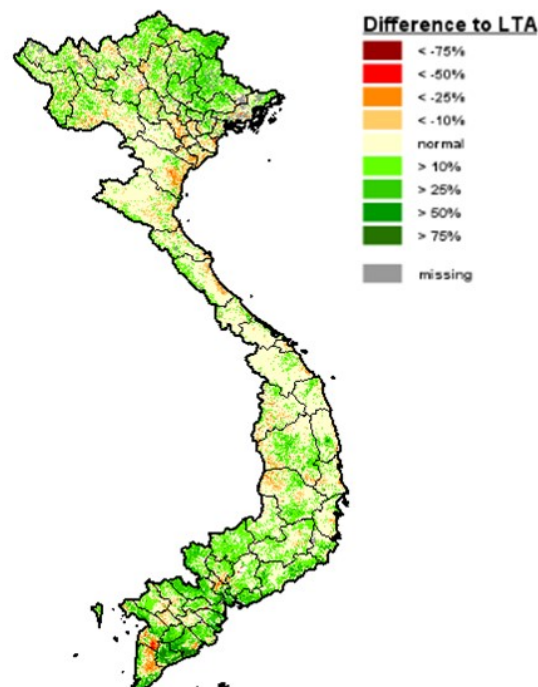
(*major foodcrop)



Sowing
Growing
Harvesting

Viet Nam - NDVI anomaly

Relative difference to Long Term Average - June 2023



According to weather forecasts, below-average precipitation amounts are likely between August and October 2023 over central and southern parts of the country, which may curb production of summer/autumn and “10th month” crops as well as affect irrigation water availability for the 2024 main winter/spring crops.

Cereal import requirements in 2023/24 marketing year (June/July) forecast at near-average level

Cereal import requirements in the 2023/24 marketing year (July/June) are forecast at a near-average level of 15.6 million tonnes. Imports of maize, which account for most of the total cereal purchases, are projected at a near-average level of 10 million tonnes, reflecting steady demand by the livestock sector. Imports of wheat, which is not domestically produced, are forecast at 4 million tonnes, 5 percent above the five-year average, driven by an increase in demand for milling wheat attributed to increasing population and to the recovery in the tourism sector after the COVID-19 pandemic.

Rice exports are forecast at 7.5 million tonnes in the 2023 calendar year, the highest level since 2015, owing to strong demand from some of its traditional Asian markets.

Domestic prices of rice higher year-on-year in June 2023

After being relatively stable at the start of the year, domestic prices of rice have been increasing since March 2023, driven by strong international demand and generally tight market availabilities. Overall, domestic rice prices in June 2023 were between 20 to 30 percent higher than one year before.

Viet Nam

Cereal Production

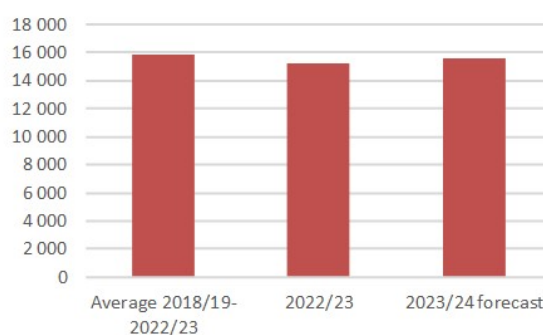
	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Rice (paddy)	43 367	42 662	42 800	0.3
Maize	4 610	4 412	4 350	-1.4
Millet	3	3	3	0.0
Total	47 979	47 077	47 153	0.2

Note: Percentage change calculated from unrounded data.

Viet Nam

Cereals Imports

000 tonnes

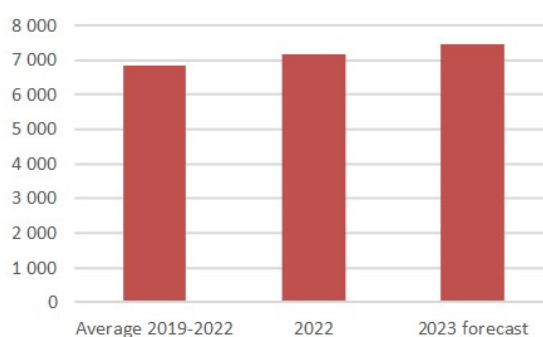


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

Viet Nam

Rice Exports

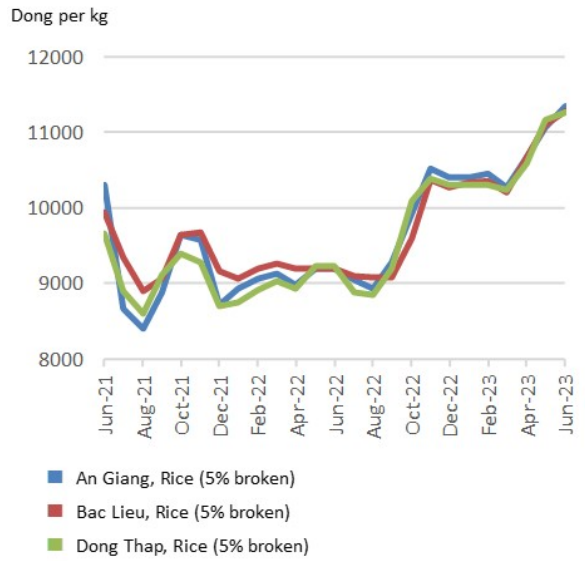
000 tonnes



Note: Rice in milled terms.

Viet Nam

Wholesale prices of rice (5% broken)



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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief Viet Nam

Reference Date: 07-September-2021

FOOD SECURITY SNAPSHOT

- Main 2021 “winter/spring” paddy crop estimated at above-average level
- Cereal import requirements in 2020/21 forecast at near-record levels
- Domestic prices of rice in June well below year-earlier levels

Main 2021 “winter/spring” paddy crop estimated at above-average level

Harvesting of the 2021 main “winter/spring” paddy crop concluded in June under favourable weather conditions. The main crop, mostly irrigated, contributes on average to about 45 percent of the annual rice output. Official estimates indicate a production of 20.5 million tonnes, 3 percent above the five-year average. The area planted was estimated below the previous five-year average, but overall yields improved supported by favourable weather conditions and adequate water supplies.

Planting of the 2021 “summer/autumn” paddy crop, which accounts for about 35 percent of the annual production, progressed in July under favourable weather conditions. According to official estimates, about 1.95 million hectares were planted, as of mid-July, close to the corresponding period in the previous year. Generally, near-average amounts and well-distributed rainfall throughout the country contributed to close-to-average vegetation conditions in July 2021 in most crop lands.

Planting of the 2021 winter “10th month” paddy crop, accounting for about 20 percent of the annual output, started in June and is expected to continue until September.

Harvesting of the 2021 main maize crop was completed in June and official estimates put this season’s output at a below-average level. The decrease in production mostly reflects a reduction in the area planted as farmers preferred to grow vegetables instead of maize. Planting operations of the 2021 secondary maize crop are ongoing under generally favourable weather conditions.

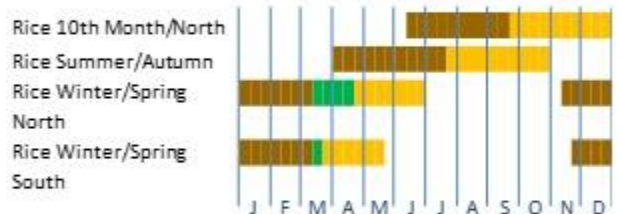
Cereal import requirements in 2021/22 marketing year (June/July) forecast at near-record level

Cereal import requirements, mostly maize and wheat, in the 2021/22 marketing year (July/June) are forecast at 17.4 million

Viet Nam

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Viet Nam

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Rice (paddy)	43 241	42 761	43 320	1.3
Maize	4 919	4 608	4 550	-1.3
Millet	3	3	3	0.0
Total	48 164	47 372	47 873	1.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

tonnes, close to previous year's record level and 14 percent above the five-year average. Import requirements of maize are forecast close to last year's record level of 12.7 million tonnes, supported by the growing demand by the feed industry that accelerated since 2012. Import requirements of wheat, which is not domestically produced, are forecast at 3.5 million tonnes, 16 percent below the five-year average, reflecting a decrease in the demand for use in feed.

Rice exports are forecast at 6.4 million tonnes in the 2021 calendar year, 4 percent below the 2020 level.

Domestic prices of rice in June well below year-earlier levels

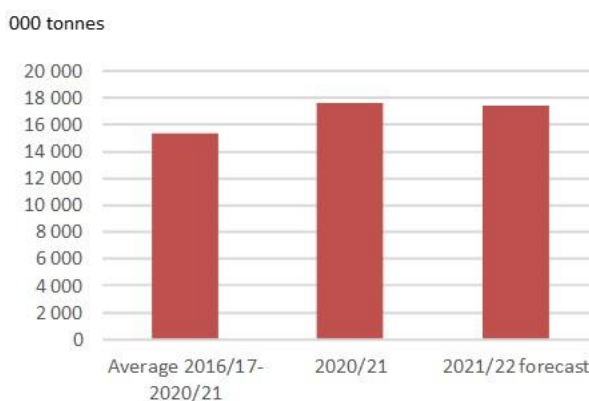
Domestic prices of rice in the country's main markets have been decreasing since May 2021, reflecting improved supplies from the early 2021 "summer/autumn" harvest. Overall, prices in the selected markets in June 2021 were well below their year-earlier levels.

African Swine Fever outbreaks severely affected pig industry in 2019, but situation improved since then

The country, the world's fifth largest producer and consumer of pork meat, was severely affected by several outbreaks of African Swine Fever (ASF) in 2019 and early 2020. According to official estimates at least 6 million pigs, accounting for more than 20 percent of the national herd, died or were culled due to ASF in 2019. Animal losses caused a substantial reduction in farmers' income, raising concerns over the livelihoods and the food security situation of about 2.5 million pig farming households. Since 2019, the death toll of pigs due to ASF decreased considerably, amounting to about 90 000 pigs in 2020 and 60 000 pigs in the first six months of 2021, less than 1 percent of the national herd.

Viet Nam

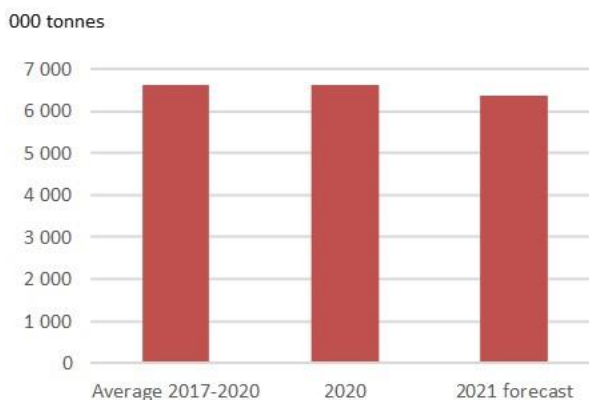
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Viet Nam

Rice Exports

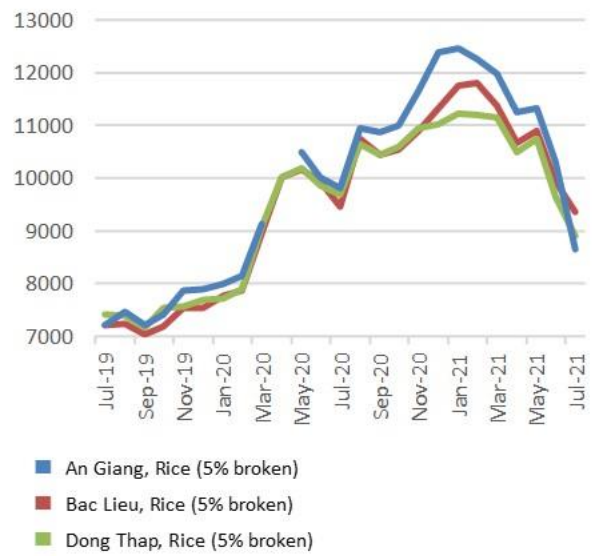


Note: Rice in milled terms.
Source: FAO/GIEWS Country Cereal Balance Sheets.

Viet Nam

Wholesale prices of rice (5% broken)

Dong per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Viet Nam

Reference Date: 21-August-2020

FOOD SECURITY SNAPSHOT

- Production of 2020 main “winter/spring” paddy crop estimated close to average level
- Exports of rice forecast close to 2019 level
- Imports of maize in 2020/21 expected to reach near-record levels
- Domestic prices of rice at high levels
- African Swine Fever outbreaks severely affected pig industry in 2019

Production of 2020 main “winter/spring” paddy crop estimated close to average level

Harvesting of the 2020, mostly irrigated, main “winter/spring” paddy crop, accounting for 46 percent of the annual output, concluded in June and the production is officially estimated at 19.9 million tonnes, close to the five-year average. The area planted is estimated slightly below the previous five-year average due to dryness and salinity intrusion in parts of the Mekong River Delta (the country’s main rice-growing region in the south), but overall yield results were positive.

Planting of the 2020 “summer/autumn” paddy crop, which accounts for about 35 percent of the annual production, was slightly delayed due to below-average rains in May and early June and salinity. According to the latest official estimates, about 1.8 million hectares were planted, as of mid-July, 4 percent below the previous year’s corresponding period. Planting of the 2020 minor winter (10th month) paddy crop, accounting for about 20 percent of the annual output, started in June and is expected to continue until September.

Harvesting of the 2020 main maize crop was completed in June and official estimates put this season’s output at a below-average level of 1.9 million tonnes. The decrease in production mostly reflects a reduction in the area planted as farmers preferred to grow vegetables instead of maize. Planting operations of the 2020 secondary maize crop are ongoing with a slight delay due to below-average rains in the central parts of the country.

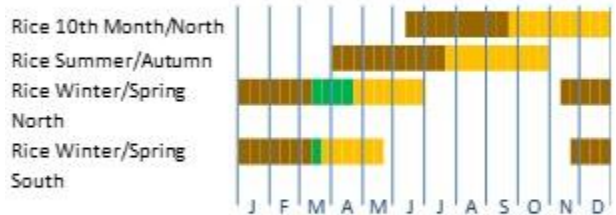
Imports of maize projected at near-record level in 2020/21

Cereal import requirements, mostly maize and wheat, in the 2020/21 marketing year (July/June) are forecast at a near-record level of 15.5 million tonnes, 10 percent above the five-year

Viet Nam

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Viet Nam

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	43 684	43 447	43 560	0.3
Maize	5 055	4 757	4 700	-1.2
Millet	3	3	3	0.0
Total	48 742	48 207	48 263	0.1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

average. Import requirements of maize are forecast close to last year's record level of 11.5 million tonnes, supported by the growing demand by the feed industry that accelerated from 2012. Import requirements of wheat, which is not produced in the country, are forecast at 3.6 million tonnes, 10 percent below the five-year average, reflecting a decrease in the demand for feed use.

Rice exports are forecast at 7.1 million tonnes in the 2020 calendar year, close to the 2019 level.

Domestic prices of rice at high levels

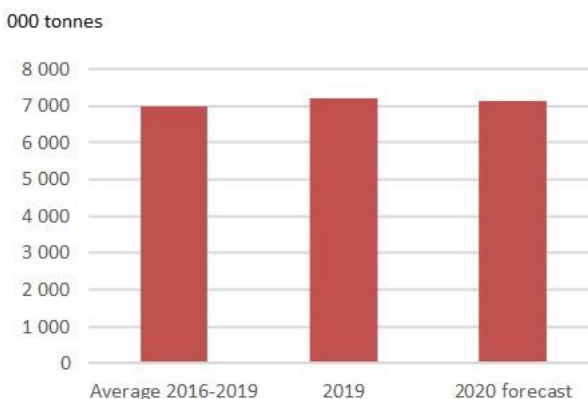
Domestic prices of rice have been increasing since the beginning of 2020, sustained by a strong demand by importing countries. Between March and April 2020, prices of rice surged by 30 percent due to panic buying by households amid the COVID-19 pandemic and concerns over the impact of dry weather conditions on the 2020 "winter/spring" output. In June, prices of rice decreased reflecting the improved supplies from the early "summer/autumn" harvest and a decline in foreign demand. Overall, prices in June 2020 were 40 percent above their year-earlier levels.

African Swine Fever outbreaks severely affected pig industry in 2019

The country, which is the fifth largest producer and consumer of pork meat in the world, has been severely affected by several outbreaks of African Swine Fever (ASF) in 2019 and early 2020. According to the latest available official estimates, as of mid-March 2020, at least 6 million pigs, accounting for more than 20 percent of the national herd, have died or have been culled due to ASF. Animal losses have caused a substantial reduction of farmers' income, raising concerns over the livelihoods and the food security situation of about 2.5 million pig farming households.

Viet Nam

Rice Exports



Note: Rice in milled terms.

Source: FAO/GIEWS Country Cereal Balance Sheets.

COVID-19 and measures adopted by the Government

As of mid-June 2020, the number of confirmed cases of COVID-19 was minimal. As a measure to prevent the spread of the virus, the Government has imposed countrywide lockdown and movement restriction measures, which were removed from 23 April 2020. Most schools, universities and non-essential services have re-opened since 7 May 2020.

In April 2020, the Government announced the implementation of a VND 271 trillion (USD 11.7 billion) package to support the national economy. Measures included:

- Tax relief by deferring Value Added Tax (VAT) and Corporate Income Tax (CIT).
- Support for land tenants by deferring land rental fees by five months.
- The one-year exemption of the business registration tax for newly established household businesses.
- First three-year exemption of business registration tax for Small and Medium-sized Enterprises (SMEs).

In addition, the Government approved a VND 36 trillion (USD 1.6 billion) programme to support affected workers and households with monthly cash transfers for a period of three months (from April to June). It is estimated that more than 10 percent of the country's total population has benefitted from this programme.

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GIEWS Country Brief Viet Nam

Reference Date: 18-October-2019

FOOD SECURITY SNAPSHOT

- Winter/spring paddy harvest estimated at bumper level in 2019
- Exports of rice expected to remain close to average level in 2019, while imports of maize and wheat in 2019/20 forecast at near-record levels
- Outbreaks of African Swine Fever threaten livelihood and food security of millions of pig-raising households

Winter/spring paddy harvest estimated at bumper level in 2019

The 2019 main winter/spring paddy crop, which accounts for about 45 percent of the total annual output, concluded in June.

Official estimates indicate a near-record production of 20.5 million tonnes. The bumper output reflects an enlarged planted area, on account of remunerative prices, and above-average yields following generally favourable weather conditions.

Harvesting of the 2019 summer/autumn paddy crop, which on average accounts for about 35 percent of the total annual production, is ongoing and is expected to continue until the end of October. Overall, near-average precipitation between April and mid-July and adequate irrigation water supplies benefitted planting operations and crop development in most rice-producing areas. Some concerns exist for crops in parts of the Mekong River Delta (the country's main rice-growing region in the south) and some provinces in the Central Highland and Southern Coastal regions (minor producing areas), due to below-average rains and limited irrigation water supplies.

Planting of the 2019 minor winter (10th month) paddy crop, which is mostly produced in areas under irrigation, started in mid-June and is progressing at a normal pace in the north, while minor delays were reported in the south. The latest official estimates, as of mid-September, indicate that around 1.6 million hectares were sown, which is slightly below last year's level for the corresponding period.

Harvesting of the 2019 main maize crop was completed in June and official estimates put this year's output at 1.9 million tonnes, close to last year's record high. The bumper production reflects the high yields due to favourable weather conditions, which more than offset a reduction in plantings as farmers shifted to

Viet Nam

Crop Calendar

(*major foodcrop)

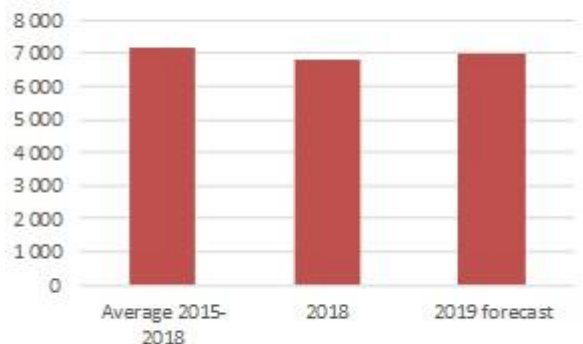


Sowing
Growing
Harvesting

Viet Nam

Rice Exports

000 tonnes



Note: Rice in milled terms.

Source: FAO/GIEWS Country Cereal Balance Sheets.

producing more profitable crops. Planting operations of the 2019 secondary maize crop are progressing at a near-normal pace.

Exports of rice in 2019 forecast close to average, while imports of maize and wheat set to reach near-record high in 2019/20

Rice exports are forecast at 7 million tonnes in the 2019 calendar year, close to the five-year average.

Cereal import requirements, mostly maize and wheat, in the 2019/20 marketing year (July/June) are forecast at a record high level of 14.9 million tonnes, almost 20 percent above the five-year average. Import requirements of maize are forecast close to last year's record level of 10 million tonnes, mainly reflecting growing demand for feed use that accelerated from 2012. Import requirements of wheat, which is not produced in the country, are forecast at 4.2 million tonnes, 10 percent above the five-year average. The increased demand for wheat reflects the sustained growth in food and feed consumption.

Prices of rice declined recently

Wholesale prices of rice declined recently, reflecting improved supplies from the summer/autumn season harvest and a slowdown in sales. Overall, prices in September were generally lower year on year.

African Swine Fever threatens livelihood and food security of millions of pig-raising households

African Swine Fever (ASF), a contagious deadly viral disease affecting domestic and wild pigs, is rapidly spreading across the country, threatening the livelihood and food security of millions of people. ASF was confirmed in the country on 19 February, and current estimates indicate its presence in 63 out of the 64 administrative divisions of the country. According to the latest official estimates, as of mid-October, more than 5.4 million pigs, accounting for nearly 20 percent of the national herd, have died or have been culled due to ASF. Animal losses are expected to result in a reduction of incomes for the households that are dependent on pig farming, which according to official estimates is the main livelihood activity for at least 2.5 million households.

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GIEWS Country Brief Viet Nam

Reference Date: 07-September-2018

FOOD SECURITY SNAPSHOT

- Rice production estimated at average levels in 2018
- Exports of rice expected to increase in 2018, imports of wheat and maize forecast at above-average levels
- Prices of rice stabilized in June, but remained at their highest level since early 2012
- Cyclone causing damage to crops and infrastructure

Rice production estimated at average levels in 2018

Harvesting of the 2018 main winter/spring season paddy crop, which accounts for about 45 percent of the total annual paddy production, concluded in June. Official estimates indicate a production of 20.5 million tonnes of paddy, 6 percent above last year's reduced level. The year-on-year increase reflects improved yields due to the favourable weather conditions and adequate water supplies, which more than offset a slight reduction in plantings.

Planting of the 2018 summer/autumn paddy crop, which accounts for about 35 percent of the total annual production, was completed in July. According to the latest official estimates around 1.9 million hectares were sown to summer/autumn paddy crop, of which 1.6 million hectares are located in the Mekong Delta. Planting of the minor winter (10th month) crop, accounting for about 20 percent of the annual output, is ongoing under generally favourable weather conditions. According to the latest official estimates, as of mid-August, around 1.3 million hectares were sown, which is close to previous years.

The 2018 maize crop harvested by June is forecast at 4.9 million tonnes, 5 percent below last year's near-average level, due to a contraction in plantings as farmers preferred to plant more profitable cash crops.

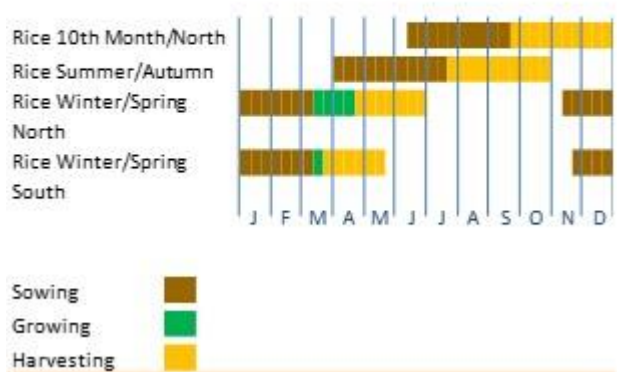
Rice exports expected to increase in 2018, while imports of wheat and maize in 2018/19 forecast at above-average levels

Rice exports are forecast at 7.2 million tonnes in calendar year 2018, 14 percent more than in 2017, due to higher demand from traditional importing countries.

Cereal imports, mostly wheat and maize, are forecast at a high level in the 2018/19 marketing year (July/June). Imports of wheat, which is not produced in the country, are expected to reach

Viet Nam

Crop Calendar (*major foodcrop)



Viet Nam

Cereal Production

	2013-2017	2017	2018	change
	average		forecast	2018/2017
000 tonnes				
				percent
Rice (paddy)	44 023	42 839	44 150	3.1
Maize	5 212	5 132	4 900	-4.5
Millet	2	3	3	0.0
Total	49 237	47 974	49 053	2.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

4.8 million tonnes, close to previous year's above-average level, reflecting high domestic demand. Maize imports are forecast at a well above-average level of 9.5 million tonnes, reflecting the sustained demand from the feed industry. Demand for feed crops rose significantly in the last four years, mainly reflecting increasing domestic pork meat consumption and high demand for pork meat from China.

Prices of rice decreased marginally in July, but remained at high level

Wholesale prices of rice decreased marginally in July, but remained at high levels, reflecting increased export demand, coming in the wake of output contractions in 2016 and 2017, along with a shift away from cultivation of lower grade Indica rice varieties.

Cyclone causing damage to crops and infrastructure

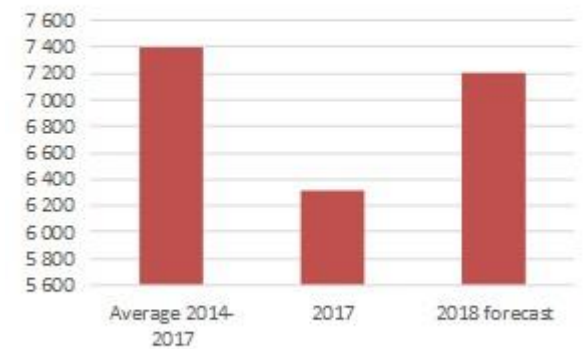
The passage of tropical storms Son Tinh in late July and Bebinca in mid-August affected northern provinces of the country, while excessive rains caused localized flooding in the southwestern provinces. According to Viet Nam Disaster Management Authority (VNDMA), as of 31 July 2018, the storms and floods resulted in 122 human casualties, affected large numbers of people, and caused damages to housing, infrastructure, livestock and crops, representing a total economic loss of USD 26 million. The most affected were provinces located in the southwest and central provinces, including Dien Bien, Son La, Yen Bai, Lao Cai, Phu Tho, Hoa Binh, Cao Bang, Lang Son, Thanh Hoa and Nghe An.

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Viet Nam

Rice Exports

000 tonnes



Note: Rice in milled terms.

Source: FAO/GIEWS Country Cereal Balance Sheets.

Viet Nam

Wholesale prices of rice

Dong per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GLEWS Country Brief Viet Nam

Reference Date: 18-August-2017

FOOD SECURITY SNAPSHOT

- Aggregate 2017 rice production expected to remain below average and close to 2016's level
- Rice exports expected to recover partially from last year's low level, while imports of wheat and maize likely to reach record highs
- Domestic prices of rice continued to increase in July
- Large number of people affected by severe weather conditions in 2016

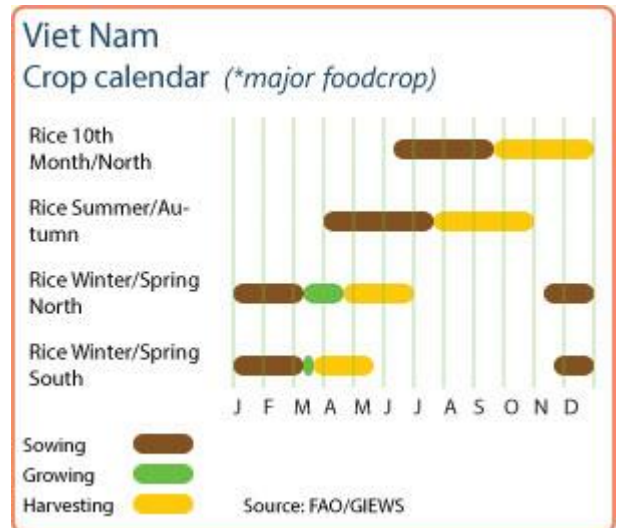
Aggregate 2017 rice production to remain slightly below average and close to 2016's level

The 2017 main winter/spring season paddy crop, which accounts for about 45 percent of the annual production, was harvested by June. Latest official estimates put this season's paddy output at 19.1 million tonnes, similar to last year's dry weather-affected output. The lower output is mainly due to lingering salinity problems and recurrent episodes of excess rains and floods during the growing season, which affected yields in the main paddy-producing Mekong River Delta.

Planting of the 2017 summer/autumn season paddy crop, which accounts for about 35 percent of the annual production, was completed by mid-August. Overall, favourable weather conditions and adequate water supplies since the start of the season have supported planting activities and early crop development. According to the latest official estimates, as of mid-July, some 2.1 million hectares were planted with summer/autumn rice, similar to last year's level of the corresponding period. In July, tropical storms Talas and Sonca brought strong winds, heavy rains and localized floods to the central and northern parts of the country, resulting in localized damage to standing paddy crops in low-lying areas.

Planting of the minor winter (10th Month) season, accounting for around 20 percent of the total output, is currently ongoing and will continue until mid-September. The current high domestic prices are expected to instigate an increase in plantings. Under the assumption of normal weather conditions throughout the season, production prospects for the winter season paddy are favourable.

Overall, the 2017 aggregate paddy production is forecast at 43.8 million tonnes, similar to last year's slightly below-average level.



Viet Nam
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	44 314	43 604	43 800	0
Maize	5 140	5 226	5 171	-1
Millet	2	2	2	0
Others	0	0	0	0
Total	49 456	48 832	48 973	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

The 2017 maize crop is officially estimated at about 5.2 million tonnes, close to last year's bumper level.

Rice exports expected to recover partially from last year's low level, while imports of wheat and maize forecast to reach record highs

Rice exports in 2017 are forecast at 6.9 million tonnes, 10 percent above last year's low level. The anticipated year-on-year increase reflects prospects of higher demand from traditional buyers, such as the Philippines and China as well as Bangladesh.

Cereal imports consist of mostly wheat and maize. In the 2016/17 marketing year (July/June), imports of wheat, which is not produced in the country, is estimated at 5.6 million tonnes, almost doubling the 2015/16 level, reflecting higher domestic demand for both high-quality wheat for milling and low-quality wheat for animal feed. Similarly, maize imports are estimated at 8.8 million tonnes, about 14 percent more than the previous year's high level, reflecting increased demand from the feed industry. Demand for feed crops has risen significantly in the last three years, mainly reflecting increasing domestic pork consumption and high demand for pork from China.

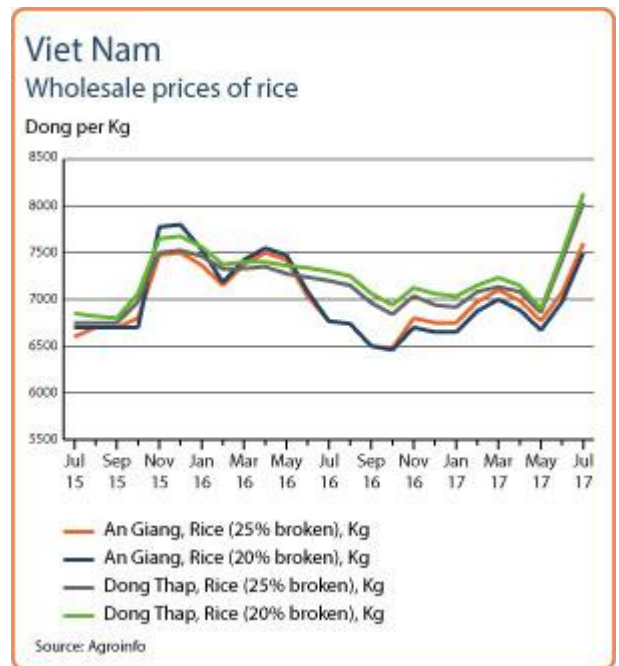
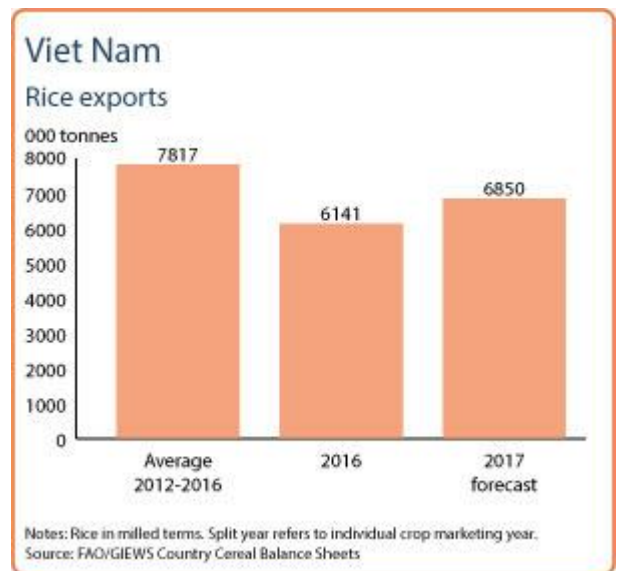
Domestic prices of rice continued to increase in July

Wholesale prices of rice, the main staple food, continued to increase in July reaching their highest level since December 2014, more than 10 percent higher than in July last year. The recent steep increases reflect tight availabilities due to the reduced main crop output and the strong demand. Heavy rains over parts of the Mekong Delta, which slowed the harvest of the early summer-autumn crops, added further upward pressure.

Large number of people affected by severe weather conditions in 2016 and 2017

A prolonged drought and saltwater intrusion during 2016 severely affected more than 2 million people in 18 out of 58 provinces, mainly in the Mekong Delta, Central Highland and South Central regions. Recurrent floods in October and December 2016 and the passage of tropical storms *Talas* and *Sonca* in July 2017, caused a series of floods mostly concentrated in South-Central Region and southern parts of North Central Coast, parts of Central Highlands and northern parts of the country, negatively impacting on livelihoods of a large number people. Reports indicate losses of livestock and food stocks as well as damage to housing and infrastructure. The drought in 2016 and recurrent floods at the end of 2016 and July 2017 caused the loss of income and purchasing power among the most affected households, due to the reduced production of paddy for sale for two consecutive years, a decrease in agricultural labour opportunities and increased retail prices. Many of these households have not yet recovered fully and require humanitarian assistance.

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GIEWS Country Brief Viet Nam

Reference Date: 23-December-2016

FOOD SECURITY SNAPSHOT

- Cereal production declined in 2016
- Rice exports forecast to increase in 2017
- Domestic prices of rice increased in November

Cereal production declined in 2016

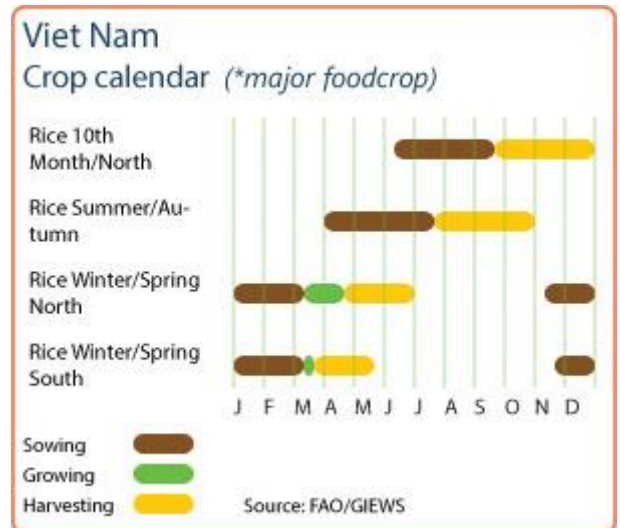
FAO forecasts the 2016 aggregate paddy production at 43.9 million tonnes, 3 percent below the 2015 record. Low irrigation water availabilities, following below-average rains during the rainy season in 2015 associated with El Niño, resulted in intensified salt water intrusion in the Mekong River Delta (the country's main rice-producing area), negatively impacting on the *winter/spring* crop, harvested by June. Latest official estimates put the 2016 winter/spring paddy output at 19.4 million tonnes, 6 percent below the same season last year. Favourable weather conditions benefitted the secondary *summer/autumn* crop, gathered by October, which is estimated by FAO to have increased by 3 percent to a record level of 15.4 million tonnes. The minor *winter* paddy crop, currently harvested, was affected by a combination of water shortages or excess rains leading to floods in the northern producing areas and lingering salinity intrusion in the southern provinces. As a result, FAO forecasts the *winter* paddy at 9.1 million tonnes, a 4 percent decrease on year-on-year basis.

FAO forecasts the 2016 maize output at 5 million tonnes, down 5 percent from 2015, due to a slight area reduction and lower yields, following dry conditions in the first part of 2016.

Rice exports forecast to increase in 2017

FAO forecasts rice exports in calendar year 2017 at 7.1 million tonnes, up 10 percent from last year's level. The anticipated increase primarily rests on expectations of increased demand from its largest buyer, China, but also larger shipments to the Philippines.

Cereal imports consist mostly of wheat and maize. During the 2016/17 marketing year (July/June), wheat imports are forecast to increase by 9 percent to 3.2 million tonnes, reflecting higher domestic demand for both high-quality wheat for milling and low-quality wheat for animal feeding. Similarly, maize imports are set to increase strongly by 18 percent from the previous year, to 9 million tonnes, reflecting increased demand from the feed industry.



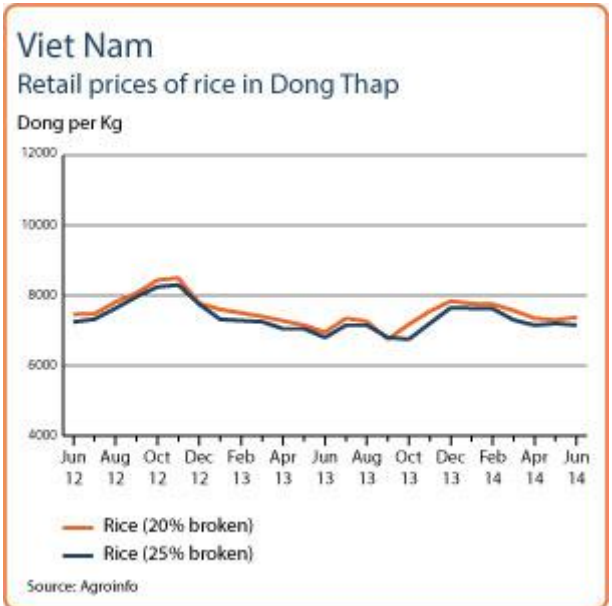
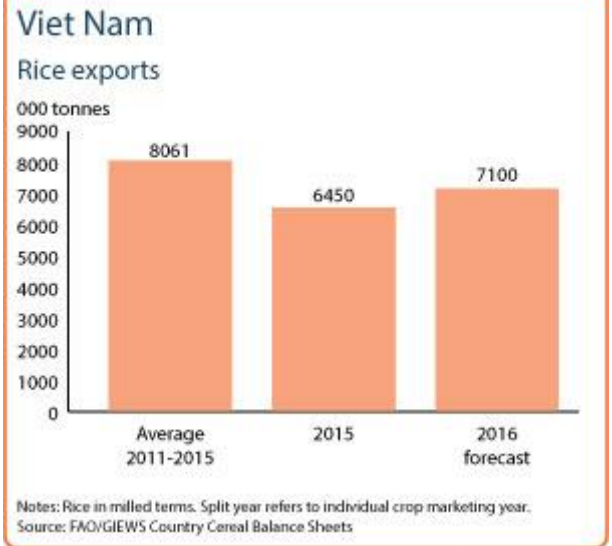
Viet Nam
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	44 073	45 216	43 900	-3
Maize	5 062	5 281	5 000	-5
Millet	2	2	2	0
Others	0	0	0	0
Total	49 137	50 499	48 902	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Domestic prices of rice increased in November

Wholesale prices of rice, the main staple food, increased in November underpinned by harvesting delays due to heavy rains in the Mekong River Delta. However, prices remained below their year-earlier levels.





GIEWS Country Brief Viet Nam

Reference Date: 05-July-2016

FOOD SECURITY SNAPSHOT

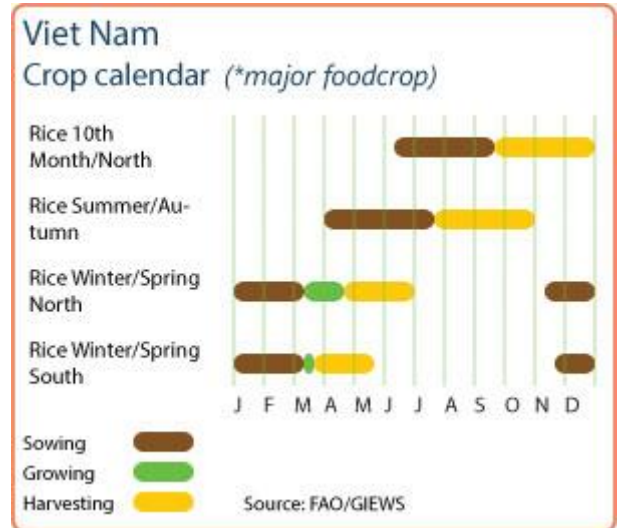
- Main 2016 *winter/spring* paddy output down due to drought and salt water intrusion
- Rice exports forecast to decline in 2016
- Domestic prices of rice decreased in May

Main 2016 *winter/spring* paddy output down due to drought and salinity intrusion

Harvesting of the 2016, mostly irrigated, main *winter/spring* paddy crop, which accounts for about 45 percent of annual production, is complete. Low irrigation water availabilities, following a generally weak rainy season in 2015 associated with El Niño and resulting in intensified salt water intrusion, have negatively impacted the main season crop. The Mekong River Delta, which accounts for half of the *winter/spring* output, recorded the highest losses, with official reports indicating that production in the Delta declining by 1.1 million tonnes year-on-year to 10 million tonnes (paddy basis). The most affected provinces include Kien Giang, Tra Vinh and Long An. Meanwhile, planting progress of the *summer/autumn* rice crop, which accounts for about 30 percent of the annual production, is somewhat behind normal due to earlier dry conditions, although rains improved over large parts of the country since late May, providing relief to the drought-affected areas. Assuming that *winter/spring* losses will be partly offset by higher output from the *summer/autumn* and *winter* harvests, FAO forecasts the 2016 aggregate paddy production at 44.5 million tonnes, 2 percent down from the 2015 record.

Planting of the 2016 maize crop is underway. FAO forecasts the 2016 maize output at 5.1 million tonnes, down 3 percent from 2015, due to a slight area reduction and lower yields expected, following earlier dry conditions.

Although the 2015/16 El Niño episode has dissipated, atmospheric conditions now point to a likely occurrence of a La Niña episode towards the end of 2016 (a 75 percent likelihood during the Northern Hemisphere's autumn and winter), which would correspond with the planting period of the 2017 main *winter/spring* crop. Some forecasts, however, indicate that La Niña may occur earlier in the July-September 2016 period. If an early onset transpires, which is historically associated with heavier rainfall, this could benefit crop development of the *summer/autumn* and *winter* season crops, although excessive rains could also raise the potential for flooding.



Viet Nam
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	44 073	45 216	44 500	-2
Maize	5 062	5 281	5 100	-3
Millet	2	2	2	0
Others	0	0	0	0
Total	49 137	50 499	49 602	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice exports forecast to decline in 2016

FAO forecasts rice exports in calendar year 2016 to decline somewhat, due to a combination of tighter export availabilities and reduced demand. Cereal imports consist mostly of wheat and maize. During the 2015/16 marketing year (July/June), wheat imports are forecast to increase by 27 percent to 2.9 million tonnes, reflecting higher domestic demand for both high quality wheat for milling, and low quality wheat for animal feeding. Similarly, maize imports are set to increase strongly by 32 percent from the previous year, to 7.5 million tonnes, reflecting increased demand from the feed industry.

Domestic prices of rice decreased in May

Wholesale prices of rice, the main staple food, declined in May, amid low demand and improved supplies from the 2016 *winter/spring* crop. However, drought-related crop losses limited the decline in prices, which remained around 8 percent higher than in May last year.

Large numbers of subsistence farming households affected by drought and salt water

Although the 2016 paddy production will exceed domestic requirements at national level, as the country is a net exporter of rice, in some areas of the Mekong Delta, Central Highlands and South Central regions that sustained serious crop losses, there are pockets where people may face food shortages in the coming months. In view of adequate availabilities of rice and other crops, and generally well-functioning domestic markets within Viet Nam, it is recommended that any food assistance to affected areas be provided in the form of cash and/or vouchers. According to a joint UN/Government/NGOs assessment, conducted in March, around 2 million people have been negatively affected by the prolonged drought.



Reference Date: 28-December-2015

FOOD SECURITY SNAPSHOT

Overall good weather conditions favour planting of 2016 main *winter/spring* paddy crop
 Aggregate rice production in 2015 forecast close to last year's record level
 Rice exports in 2015 estimated to increase from last year's high level
 Domestic prices of rice increased considerably in November

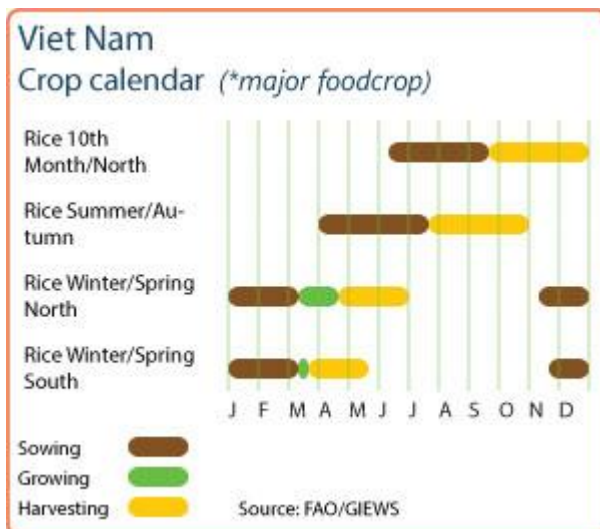
Planting of 2016 *winter/spring* paddy crop progressing at a fast pace

Planting of the 2016, mostly irrigated, main *winter/spring* paddy crop starts in mid-November in the south and continues until March in the north. Overall, favourable weather conditions and fewer incidences of floods since November allowed farmers to start planting early. According to official estimates from the General Statistics Office (GSO), as of mid-December, *winter/spring* rice in the south had been sown on 1.1 million hectares, some 4 percent above the area planted by the same time last year. Despite the fast pace in this season's paddy plantings so far, which is positive for the production outlook, there are some concerns over low water levels in the Mekong River, following considerably reduced rains since early 2015, associated with the ongoing strong El Niño event in the upper basin countries, namely Cambodia and Lao People's Democratic Republic. The low water levels for irrigation coupled with less alluvial deposits in the fields and intensified salinity intrusion, could have a negative impact on the yield potential of the *winter/spring* crop.

Aggregate rice production in 2015 forecast close to last year's record level

Harvesting of the 2015 *summer/autumn* season crop was completed in October and that of the minor *winter* crop is nearing completion. Below-average rainfall from April to July over the Central Highlands, North Central and Central Coastal areas, and parts of the southern main rice-growing Mekong River Delta, delayed planting of both crops. A more normal pattern of rains resumed from late July over the main rice producing areas, allowing the pace of paddy planting to pick up. The improved moisture conditions were also beneficial for yields. FAO currently estimates the 2015 *summer/autumn* rice production at a record level of 14.8 million tonnes and the *winter* crop output is anticipated to remain close to last year's high level as a result of good yields which offset a marginal contraction in planted area. Overall, the 2015 aggregate rice production, including the *winter/spring* harvested earlier in the year, is set at 45.1 million tonnes, close to the 2014 record level. On average, the *winter/spring* paddy crop amounts to about 46 percent of the annual paddy production, while the remaining two seasons, *summer/autumn* and *winter*, account for 32 and 22 percent, respectively.

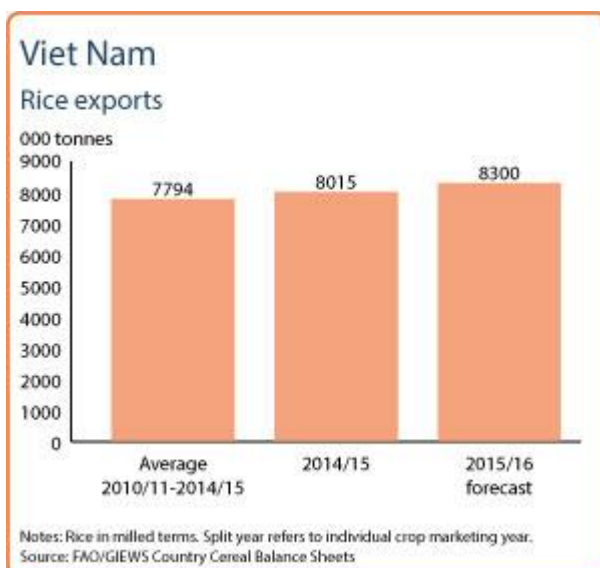
Official estimates put the 2015 aggregate (*winter/spring* and *summer/autumn*) maize crop at a record level of 5.3 million tonnes, up 2 percent from the 2014 bumper level. The year-on-year increase is



Viet Nam Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	43 031	44 975	45 097	0
Maize	4 927	5 192	5 300	2
Millet	2	2	2	0
Others	0	0	0	0
Total	47 960	50 169	50 399	0

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets



the result of a record 2015 main *winter/spring* harvest. Some losses of the 2015 *summer/autumn* crops were caused by prolonged dry weather from April to July, particularly over parts of Central Highlands, North Central and Central Coastal areas.

Rice exports in 2015 forecast to increase from last year's high level

Rice exports in 2015 are forecast at 8.3 million tonnes, 4 percent up from last year's high level, reflecting strong import demand from China and a recent large contract with Indonesia.

Cereal imports consist mostly of wheat and maize. During the 2015/16 marketing year (July/June), wheat imports are anticipated to increase by 12 percent to 2.4 million tonnes, reflecting higher domestic demand. By contrast, maize imports are set at 5.5 million tonnes, a 3 percent decrease compared with last year's level, in line with the 2015 record output. Rice imports in 2015 are forecast to contract by 9 percent to 500 000 tonnes as a result of the estimated bumper harvest in 2015 and low exports earlier in the year.

Domestic prices of rice increased considerably in November

Wholesale prices of rice, the main staple food, increased considerably in November, underpinned by large government-to-government deals with the Philippines and Indonesia. Overall, rice prices remained lower than their year-earlier levels following two consecutive years of bumper outputs.



Reference Date: 28-July-2015

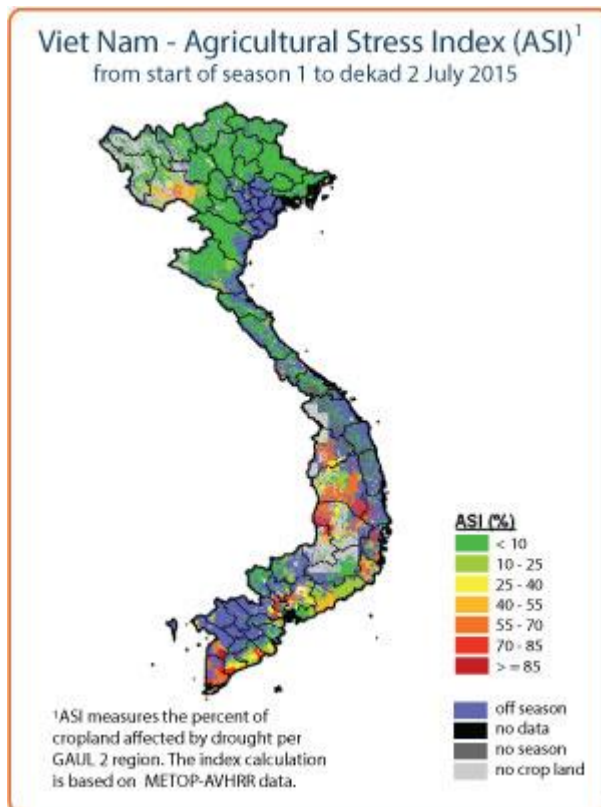
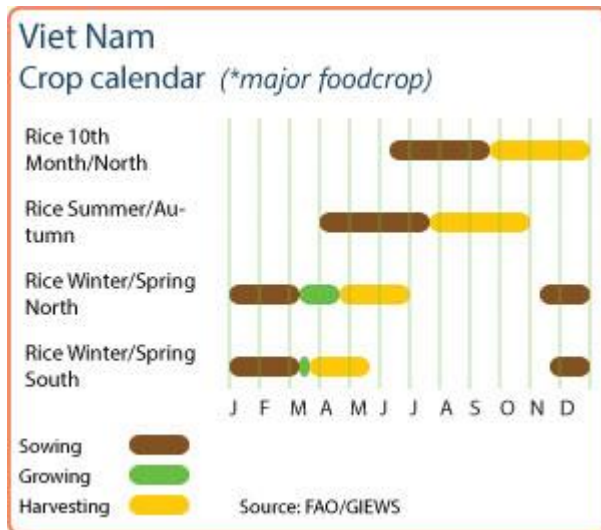
FOOD SECURITY SNAPSHOT

- Poor rains affect crops in parts but overall prospects for 2015 aggregate rice production remain favourable
- Rice exports in 2015 are forecast slightly below last year's low level
- Domestic prices of rice declined slightly in first two weeks of July

Planting of the 2015 *summer/autumn* season rice crops has been delayed by dry weather in parts

Planting of the 2015 *summer/autumn* season paddy crop is nearing completion, with the bulk already planted between April and June. Below-average rainfall, coupled with warmer-than-usual temperatures from April to early July delayed planting operations somewhat and the yield potential of the earliest planted crops has likely been negatively affected. According to official estimates, as of mid-June, *summer/autumn* rice had been sown on some 1.9 million hectares, 6 percent below the area planted by the same time last year. In 2014 the total area sown to the *summer/autumn* crop was 2.7 million hectares. The regions most affected by the dry weather are Central Highlands, North Central and Central Coastal areas, but also parts of the southern main rice-growing Mekong River Delta. According to official information, in these regions water levels in reservoirs and rivers is well below-average, following considerably reduced rains since early 2015. There is also some concern about planting of the 10th Month (*winter*) season rice crop, which has just started and will continue into October. Output from the 2015 main winter/spring season rice crop, harvesting of which was completed by June, is officially estimated at 20.7 million tonnes, close to the record of 2014 for the same season. Overall, based on the estimates for the already-harvested *winter/spring* crops and the early outlook for the ongoing 2015 *summer/autumn* and the 10th Month (*winter*) seasons, FAO tentatively forecasts the 2015 aggregate rice production at 44.7 million tonnes, close to last year's bumper level. On average, the almost entirely irrigated *winter/spring* paddy crop amounts to about 46 percent of the annual paddy production, while the remaining two seasons, *summer/autumn* and 10th Month account for 32 and 22 percent, respectively.

Planting of the 2015 mostly rainfed *summer/autumn* maize crop is nearing completion. The current dry weather has likely delayed planting operations, which could lead to a reduction in area and negatively affect yields in localized parts of Central Highlands, North Central and Central Coastal areas. These areas together normally account for close to 60 percent of the overall maize output. Latest official estimates put the 2015 winter/spring maize crop, harvested by April, at 2.5 million tonnes, 4 percent up on last year's high level for the corresponding season. This is mainly the result of higher yields, following favourable weather conditions in the Northern Midland and Mountain areas, where about 80 percent of winter/spring maize is grown, coupled with the use of genetically-modified high-yielding varieties. Based on the good result of the winter/spring crop, but assuming a small decrease in plantings and yields for the second



2015 crop, FAO tentatively forecasts the aggregate 2015 maize production at 5 million tonnes, 4 percent below last year's record level.

The ongoing dry weather may be attributed to the current global El Niño event, which is often associated with dry weather in the region, although no precise quantitative association between the occurrence of El Niño and its impact on agricultural production can be deduced. Its impact on crops very much depends on the timing and intensity of the phenomenon. Currently, reports from the main meteorological and oceanic institutions stipulate that El Niño conditions will likely strengthen in the coming months and persist through 2015/16 winter.

Rice exports in 2015 are forecast slightly below last year's low level

Rice exports in 2015 are forecast at 6.3 million tonnes, slightly below last year's low level. According to Viet Nam Customs, cumulative exports between January and mid-July 2015 are estimated at 3.4 million tonnes, some 4 percent below the exported volumes in the same period last year.

Cereal imports consist mostly of wheat and maize. During the 2015/16 marketing year (July/June), wheat and maize imports are forecast at 2.3 and 4.5 million tonnes, respectively. Rice imports in 2015 are forecast to remain similar to last year's average level of 550 000 tonnes.

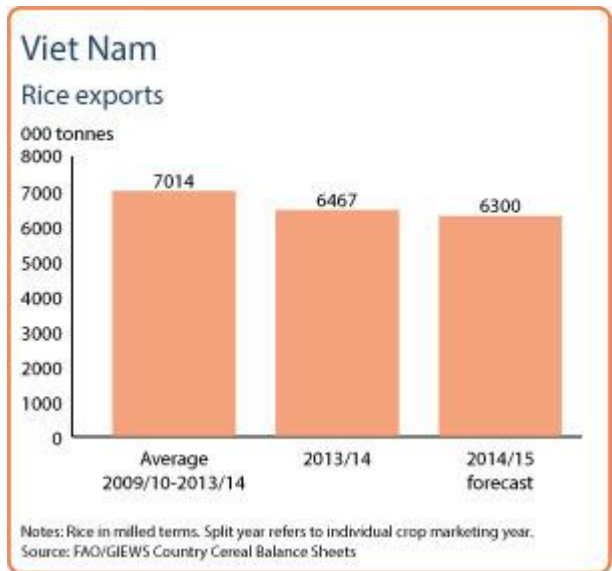
Domestic prices of rice declined slightly in first two weeks of July

Wholesale prices of rice, the main staple food, decreased slightly in the first two weeks of July, pressured by good supplies from the recently-harvested 2015 *winter/spring* crop. Weak export demand also added to the downward pressure on prices. Overall, rice prices were well below the levels a year earlier.

Viet Nam
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	43 031	44 975	44 680	-1
Maize	4 927	5 192	5 000	-4
Millet	2	2	2	0
Others	0	0	0	0
Total	47 960	50 169	49 682	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 21-April-2015

FOOD SECURITY SNAPSHOT

- Poor rains affect crops in parts but overall 2014/15 *winter/spring* rice prospects remain favourable
- Rice exports in 2015 are forecast to remain close to last year's below-average level
- Domestic prices of rice were unchanged in March 2015

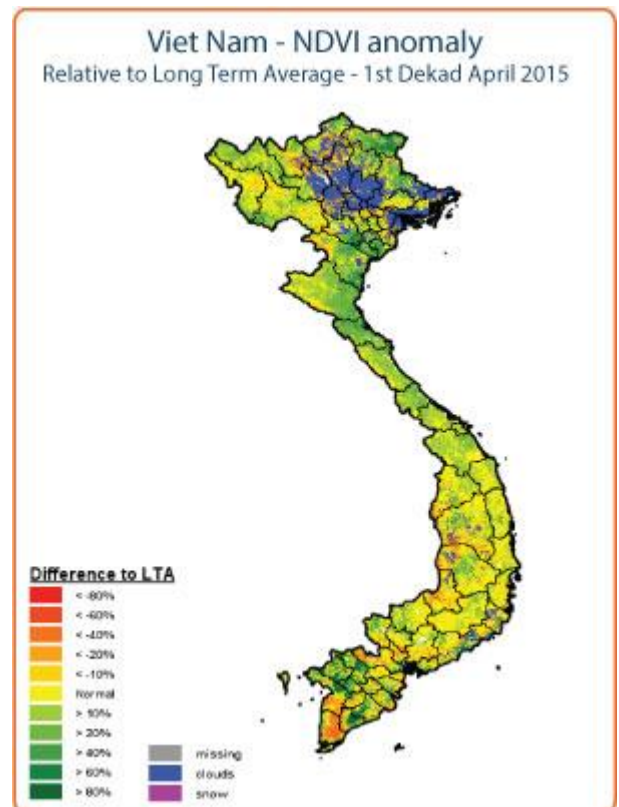
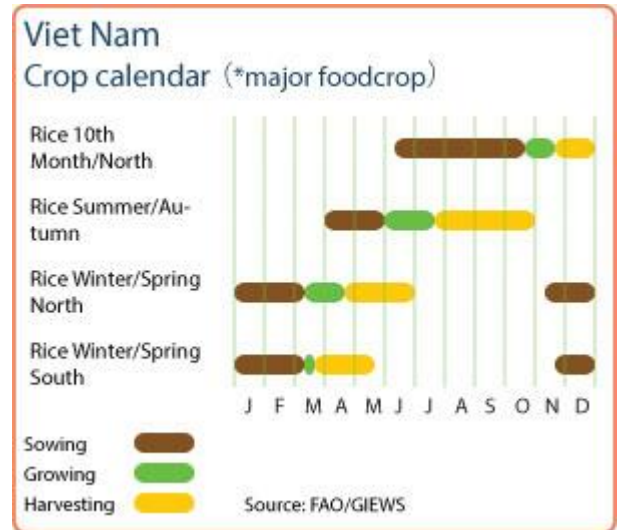
Prospects for 2014/15 *winter/spring* rice remain favourable despite dry conditions affecting crops in central and southern provinces

In Viet Nam, harvesting of the 2014/15, mostly irrigated, main *winter/spring* paddy crop, which accounts for about 45 percent of annual production, started in late March in the south and will be concluded in July in the north. According to the latest official estimates, some 3 million hectares were placed under the 2015 *winter/spring* rice, marginally below last year's record level of the corresponding season. Overall, good rains in the Red River Delta, the main rice-producing areas in the north and adequate irrigation water systems in the main rice-growing areas of the Mekong River Delta in the south, benefitted planting operations and crop development in these areas. By contrast, in the Central Highlands and Southern Coastal provinces, prolonged poor rains from January to mid-April, have reportedly reduced water supplies for irrigation and will likely affect yields of this season's rice crop. In these regions, there is also some concern over the 2015 *summer/autumn* crop, which is currently being planted. Poor rains are forecast until September 2015. While production in these areas is likely to be affected, at national level, the overall impact on the *winter/spring* and *summer/autumn* crop is expected to be minimal, since the two regions together account for around 5 percent only of the total area planted to rice in the these seasons. Considering a small decrease in plantings and overall good growing conditions (NDVI anomaly graph), FAO forecasts the 2015 *winter/spring* rice harvest at 20.6 million tonnes, 1 percent below the 2014 record level. Assuming improved rains and continued Government support to mitigate the impact of dry weather in the affected area, the 2015 aggregate rice production, including the ongoing *winter/spring*, *summer/autumn* and the forthcoming 10th *Month* seasons, is put at 44.8 million tonnes, similar to last year's record level.

Planting of the 2015 maize crop is underway. Preliminary official estimates, as of mid-March, indicated that 356 500 hectares have been placed under the maize crop, some 2 percent above the area planted at the same time in 2014. Despite the small increase in planting, 2015 maize production is forecast by FAO to decrease slightly to 5.1 million tonnes, as yields are expected to return to average after the record level of the previous year.

Rice exports in 2015 are forecast close to last year's below-average level

Rice exports in 2015 are forecast at 6.5 million tonnes, close to last year's below-average level. According to the General Statistic Office



of Viet Nam (GSO), in the first quarter of 2015 around 1 million tonnes of rice were estimated to have been exported, some 25 percent below the exported volumes of the same period last year.

Cereal imports consist mostly of wheat and maize. During the 2014/15 marketing year (July/June) they are forecast at 2.1 and 2 million tonnes, respectively. Rice imports in 2015 are projected to remain similar to last year's average level of 550 000 tonnes. Overall, cereal imports are set at 4.7 million tonnes, slightly below last year's above-average level.

Domestic prices of rice were unchanged in March

Wholesale prices of rice, the main staple food, were generally stable in March. The downward pressure from the 2014/15 *winter/spring* harvest was offset by the Government procurement programme at increased prices and strong export demand. Overall, rice prices were below the levels a year earlier.

Viet Nam

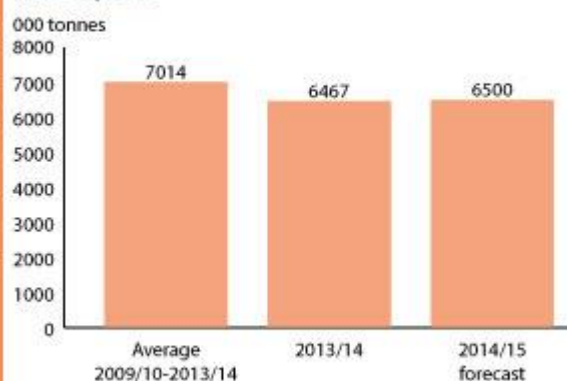
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	43 035	44 994	44 800	0
Maize	4 927	5 192	5 100	-2
Millet	2	2	2	0
Others	0	0	0	0
Total	47 964	50 188	49 902	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Viet Nam

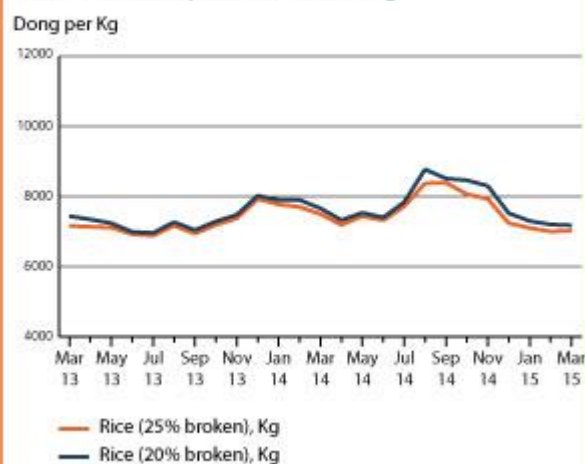
Rice exports



Notes: Rice in milled terms. Split year refers to individual crop marketing year.
Source: FAO/GIEWS Country Cereal Balance Sheets

Viet Nam

Wholesale rice prices in An Giang



Source: Agroinfo

Reference Date: 12-March-2015

FOOD SECURITY SNAPSHOT

- Below-average rains delayed planting of 2015 *winter/spring* cereal crop but overall prospects are satisfactory
- Record paddy production estimated in 2014
- Rice exports expected to increase in 2015
- Domestic prices of rice decreased slightly in February 2015

Below-average rains delayed plantings, but overall prospects for 2014/15 *winter/spring* crop are good

Harvesting of the 2014/15 main *winter/spring* paddy crop is currently ongoing and will continue until the end of July. Below-average rains from mid-January to late February, over the main rice producing areas, including Central and Southern Coastal Regions and Red River Delta, somewhat delayed planting activities. The latest official estimate indicates that as of mid-February 2.39 million hectares have been placed under *winter/spring* paddy, 8 percent less than the area planted at the same period last year. Assuming average to near-average rainfall and adequate irrigation water supply for the remainder of the season, the prospects for the current paddy crop remain favourable.

Record 2014 aggregate paddy output estimated

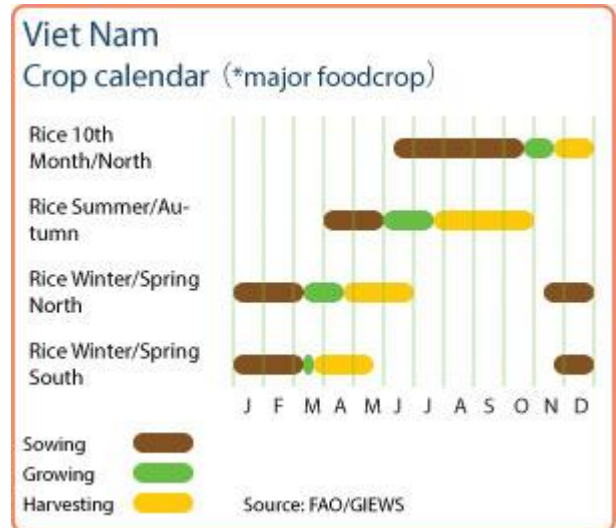
The 2014 aggregate rice production, including *winter/spring*, *summer/autumn* and the *10th Month* seasons, is officially estimated at a record level of 45 million tonnes, some 2 percent above 2013's bumper level. This largely reflects record yields due to favourable weather conditions, which have more than compensated for a small contraction in the area sown. The increase in production is estimated to come from the *winter/spring* and *summer/autumn* harvests, which are estimated to have increased by 780 500 tonnes and 270 000 tonnes, respectively, compared to the previous year's outputs of the same seasons. On average, the almost entirely irrigated *winter/spring* crop generally amounts to about 46 percent of the annual paddy production, while the remaining two seasons, *summer/autumn* and *10th Month*, account for 32 and 22 percent, respectively.

Similarly, the 2014 maize production is officially estimated at 5.2 million tonnes, close to the previous year's level.

Rice exports forecast to increase in 2015

Rice exports in 2015 are forecast at 6.9 million tonnes, 7 percent above last year's below-average level. According to the General Statistic Office of Viet Nam (GSO), in the first two months of 2015 around 515 000 tonnes of rice were estimated to have been exported, some 30 percent below the exported volumes of the same period last year.

Cereal imports consist mostly of wheat and maize. During the 2014/15 marketing year (July/June) they are forecast at 2.1 and

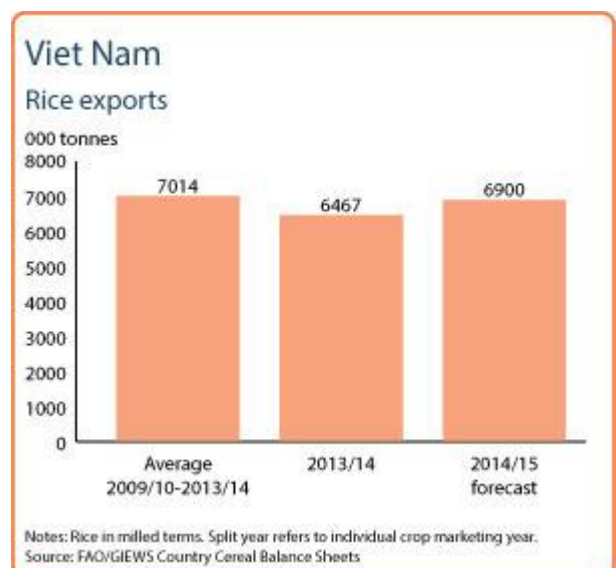


Viet Nam

Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	41,826	44,039	44,994	2
Maize	4,775	5,196	5,192	0
Millet	2	2	2	0
Others	0	0	0	0
Total	46,603	49,237	50,188	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

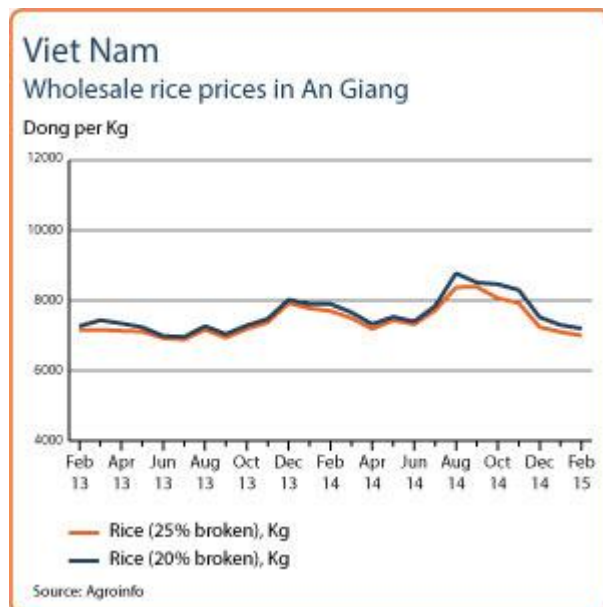


2 million tonnes, respectively. Overall, cereal imports are set at 4.7 million tonnes, slightly below last year's above-average level.

Domestic prices of rice decreased slightly in February

Wholesale prices of rice, the main staple food, decreased slightly in February, with ample supplies from the 2014 harvests and the arrival of the 2014/15 main season *winter/spring* crops. In an attempt to support domestic prices, the Government approved the purchase of 1 million tonnes of rice (milled terms) from the main 2014/15 *winter/spring* crop. The procurement programme began on 1 March and will continue until 15 April. The Viet Nam Food Association (VFA) set procurement targets of about 250 000 tonnes in An Giang province, about 175 000 tonnes in Can Tho province and relatively smaller targets in other provinces.

According to the GSO, the year-on-year inflation rate in February 2015 was 0.34 percent compared to last year's same period.



Reference Date: 29-September-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate rice production forecast at a record level
- Rice exports expected to increase in 2014
- Domestic prices of rice continued to increase in August

The 2014 aggregate rice production forecast slightly above last year's record level

Harvesting of the 2014 summer/autumn and 10th-Month paddy crops, accounting for 32 and 22 percent, respectively, of the annual production, is currently underway. FAO forecasts the outputs of the two seasons to decrease marginally from the high levels of the last year's corresponding seasons. This is the result of a small contraction in planted area, following the Government's efforts to shift paddy land to other crops, including maize and soybeans, to avoid paddy over-production and prevent downward pressure on prices. The 2013/14 winter/spring paddy crop, harvested by June, is officially estimated at a record level of 20.8 million tonnes, up 4 percent from last year's same season bumper crop. This largely reflects record yields due to favourable weather conditions and adequate supplies of irrigation water during the growing season. Considering gains already achieved with the winter/spring harvest and assuming average yields for the crops still to be harvested, FAO forecasts the 2014 aggregate rice production at a record high of 44.5 million tonnes, slightly above the bumper level of 2013.

Harvesting of the 2014 maize crop is almost complete. FAO estimates the 2014 aggregate maize output at a record level of 5.4 million tonnes, up 4 percent from the 2013 bumper output. This is mainly the result of an expansion in plantings and slightly higher yields, following favourable weather during the cropping season.

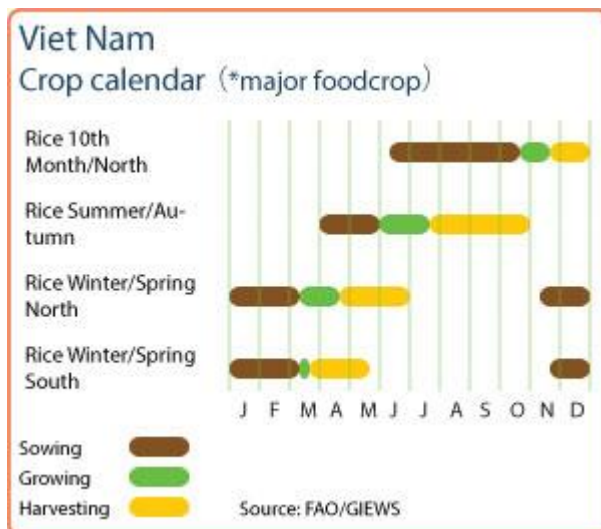
Rice exports expected to increase in 2014

The 2014 rice exports are forecast at 6.5 million tonnes, slightly below last year's level. According to the General Statistics Office, rice exports between January and August 2014 reached 4.5 million tonnes, some 7 percent below the level recorded at the same period in 2013.

Cereal imports of the country consist mostly of wheat and maize. During the 2014/15 marketing year (July/June) they are forecast at 2.1 and 1.8 million tonnes, respectively. Overall, cereal imports are set at 4.5 million tonnes, slightly below last year's above-average level.

Domestic prices of rice continued to increase in August

Wholesale prices of rice, the main staple food in the country, increased markedly in August and were considerably higher than a year earlier. Strong import demand, particularly from China, supported prices and more than offset the downward pressure from the progress of the secondary 2014 summer/autumn crop harvest. The latest available official data indicates a 4.3 percent year-on-year increase in

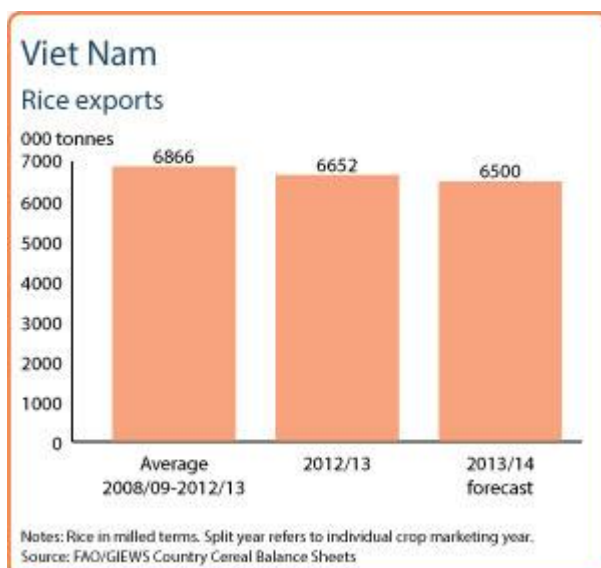


Viet Nam

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	41 788	43 859	44 500	1
Maize	4 775	5 196	5 400	4
Millet	2	2	2	0
Others	0	0	0	0
Total	46 565	49 057	49 902	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



the Consumer Price Index (CPI) in August 2014.



Reference Date: 23-July-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate rice production forecast at a record level
- Rice exports expected to increase in 2014
- Domestic prices of rice continued to decline in June

The 2014 aggregate rice production forecast slightly above last year's record level

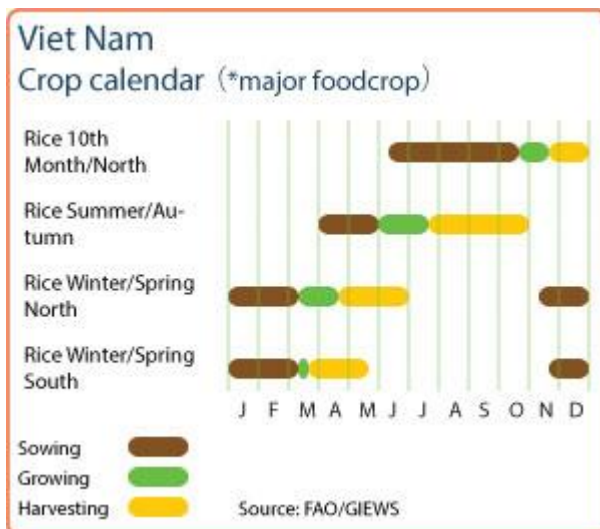
Harvesting of the 2013/14 mostly irrigated winter/spring paddy crop, accounting for about 45 percent of annual production, was completed in late June. According to the General Statistical Office (GSO) this season's paddy production is estimated at a record level of 20.8 million tonnes, up 4 percent from last year's same season bumper crop. This largely reflects record yields due to favourable weather conditions and adequate supplies of irrigation water during the growing season. Harvesting of the 2014 summer/autumn rice crop has just started, while that of the 10th Month will commence in mid-November and continue into December. On average, the summer/autumn and 10th Month harvests account for 32 and 22 percent, respectively, of the annual production. Current indications show a slight contraction in planted area of the two remaining seasons, following the Government's efforts to shift paddy land to other crops, including maize and soybeans, to avoid paddy over-production and prevent downward pressure on prices. Based on estimates of the already harvested winter/spring crop, and assuming good weather conditions for the remainder of the cropping seasons, FAO forecasts the 2014 aggregate rice production at a record high of 44.5 million tonnes, slightly above the bumper level of 2013.

Harvesting of the bulk of the 2014 maize crop is currently underway and will be completed in late September. Official estimates indicate that, as of June, some 2.5 million tonnes of maize have been already harvested, 8 percent above the output at the same time in 2013. Considering gains already achieved and assuming average yields for the crops still to be harvested, FAO tentatively forecasts the 2014 aggregate maize harvest at a record level of 5.4 million tonnes, up 4 percent from the 2013 bumper output.

Rice exports expected to increase in 2014

The 2014 rice exports are forecast at 7 million tonnes, some 5 percent above last year's low level. This reflects expectations of another good production in 2014 and higher export demand from Asian countries, including Indonesia, the Philippines, Malaysia and China, in response to relatively low export prices. According to GSO, rice exports between January and June 2014 reached 3.3 million tonnes, some 6 percent below the level recorded at the same period in 2013.

Cereal imports of the country consist mostly of wheat and maize. During the 2013/14 marketing year (July/June) they were estimated at 2.1 and 1.6 million tonnes, respectively. Overall, cereal imports are set at 4.2 million tonnes, some 6 percent above last year's above-average level, due to continued strong domestic demand.

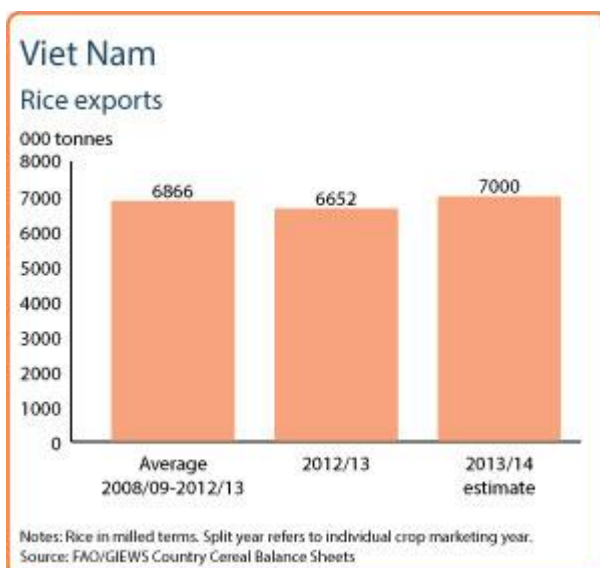


Viet Nam

Cereal production

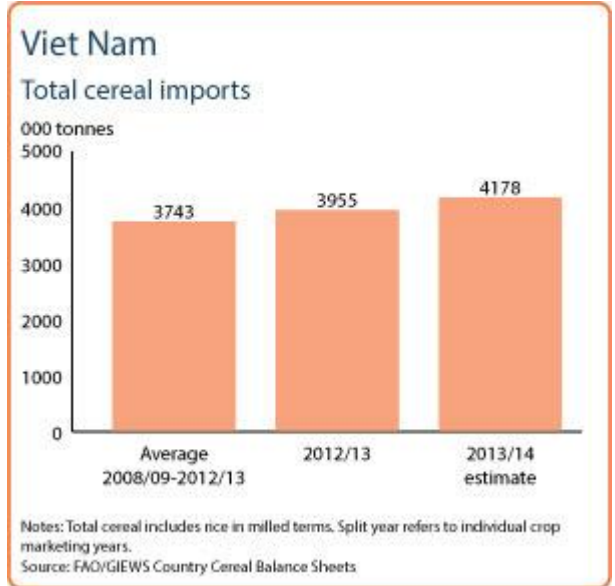
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	41,788	43,859	44,500	1
Maize	4,775	5,196	5,400	4
Millet	2	2	2	0
Others	0	0	0	0
Total	46,565	49,057	49,902	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Domestic prices of rice continued to decline in June

Wholesale prices of rice, the main staple food in the country, continued in June their declining trend since the beginning of the year, with the arrival into the markets of the 2014 summer/autumn harvest. However, steady import demand, particularly from China limited further price declines. Overall, prices in June, in nominal terms, were up on their levels at the same time a year earlier, in line with the general year-on-year inflation rate of 5 percent (June 2014).



Reference Date: 13-May-2014

FOOD SECURITY SNAPSHOT

- The 2013/14 winter/spring output estimated at a near-record level
- Rice exports forecast to increase in 2014
- Domestic prices of rice remain generally stable at low levels

The 2013/14 winter/spring output estimated at a near-record level

Harvesting of the 2013/14 mostly irrigated winter/spring paddy crop, accounting for about 45 percent of annual production, is almost completed in the south and will continue until July in the north. FAO's latest forecast puts the 2014 winter/spring paddy production at 20.3 million tonnes, similar to last year's same season bumper output. The anticipated good outcome is the result of higher yields, due to favourable weather conditions and adequate supplies of irrigation water. This more than offset the slight contraction in area planted, following the official efforts to shift paddy land to other crops, including maize and soybeans, in an attempt to avoid paddy overproduction and prevent downward pressure on prices. Planting of the 2014 summer/autumn and 10th Month rice crops, accounting for 32 and 22 percent, respectively of annual production, will start later this year. Assuming good weather conditions during the cropping seasons, FAO tentatively forecasts the 2014 aggregate rice production (including the ongoing winter/spring, summer/autumn and the 10th Month harvests) at around the good level of last year.

Sowing of the 2014 maize crop is underway. Preliminary official estimates, as of mid-May, indicates that 453 300 hectares have been placed under maize crop, some 2 percent above the area planted at the same time in 2013. Assuming that the plantings will continue to increase and favourable weather conditions will prevail during the season, FAO tentatively forecasts the 2014 maize harvest at a record level of 5.4 million tonnes, up 4 percent from the 2013 bumper output.

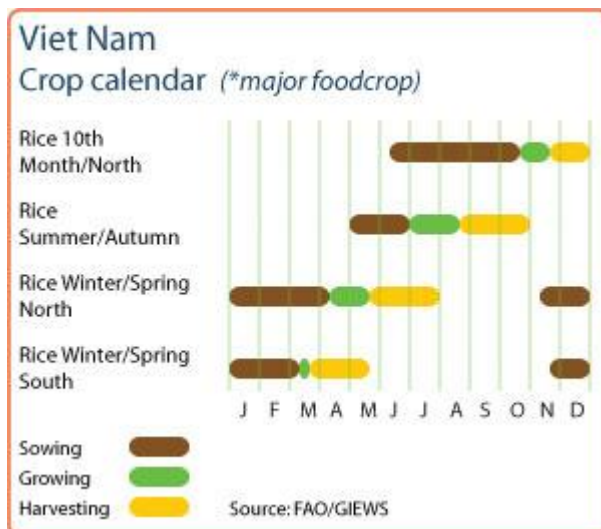
Rice exports forecast to increase in 2014

The 2014 rice exports are forecast at 7.2 million tonnes, some 9 percent above last year's low level. This reflects expectations of another good production in 2014 and higher export demand from Asian countries, including Indonesia, the Philippines, Malaysia and China, in response to low prices. According to the General Statistics Office (GSO), rice exports between January and April 2014 reached 2.1 million tonnes, similar to the level during the same period in 2013.

Cereal imports of the country consist mostly of wheat and maize. During the 2013/14 marketing year (July/June) they are forecast at 1.9 and 1.3 million tonnes, respectively. Overall, cereal imports are forecast at 3.7 million tonnes, similar to last year's below-average level.

Domestic prices of rice continued to decline in April

Wholesale prices of rice, the main staple food in the country,

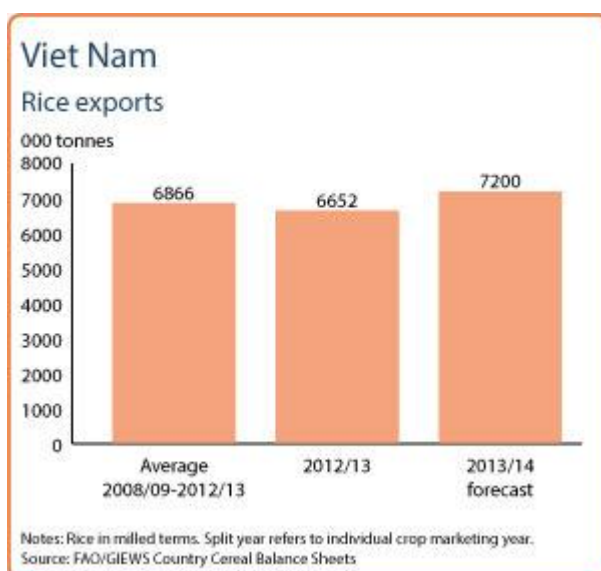


Viet Nam

Cereal production

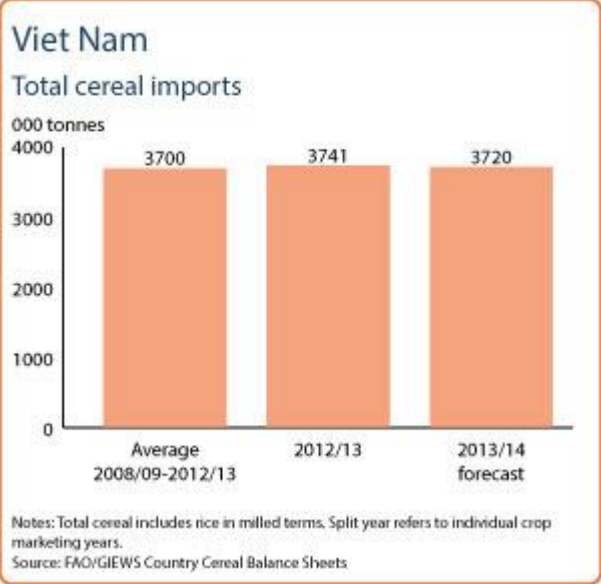
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	41 831	44 076	44 200	0
Maize	4 775	5 196	5 401	4
Millet	2	2	2	0
Others	0	0	0	0
Total	46 608	49 274	49 603	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



continued their declining trend in April, with the near-record 2013/14 main season winter-spring harvest, entering the markets. Lower cross-border exports to China, mainly due to increased transportation costs, also contributed to the decline. However, the government procurement programme, which started in mid-March and targets the purchase of 1 million tonnes of the current rice crop, limited the decrease in prices. Overall, domestic rice prices in April were similar to their levels at the same time last year.

According to the GSO, the year-on-year consumer price index increased by 4.5 percent in April 2014.



Reference Date: 23-December-2013

FOOD SECURITY SNAPSHOT

- Despite localized floods the overall 2013/14 winter/spring planting expected to be up
- 2013 rice production estimated to reach record level. Lower rice exports in 2013
- Domestic prices of rice remain generally stable at low levels

Despite storms and localized floods the overall 2013/14 winter/spring plantings expected to be up

Planting of the 2013/14, almost entirely irrigated winter/spring paddy crop accounting for some 46 percent of the annual paddy production normally begins in mid-November and continues until early April. Generally favourable rains since early November, particularly over large parts of Red River Delta in the North and Mekong River Delta in the South, major rice growing areas, improved soil moisture allowing farmers to start planting early. A preliminary official estimate indicates that as of mid-November 1.47 million hectares have been sowed under winter/spring paddy, some 6 percent above the good level in 2012.

Subsequent storms/typhoons and heavy rains from October to mid-November, resulted in localized flooding and landslides, affecting the northern and central parts of the country. However, the overall effect on national rice production is expected to be minimal since the path of the storms and floods largely avoided the main rice growing areas.

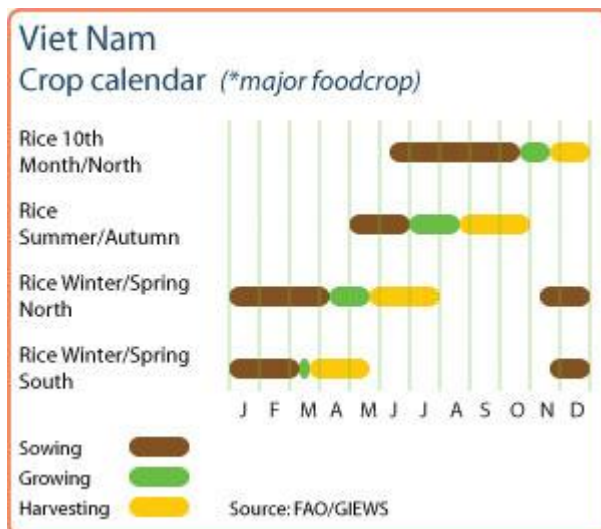
2013 rice production estimated to reach record level

Harvesting of the 2013 10th Month paddy rice, accounting for some 22 percent of the annual production, is currently underway, while that of summer/autumn and winter/spring seasons were completed earlier in the year. Based on the recent estimates from General Statistic Office of Viet Nam (GSO), the 2013 aggregate rice production (in paddy terms) is set at a record level of 44.1 million tonnes, slightly above the 2012 bumper harvest. While the winter/spring harvest was estimated similar to the previous year's record level, the summer/autumn and 10th Month crop, are projected to increase to 14.3 million tonnes (up by some 3 percent) and 9.6 million tonnes (up by 1 percent), respectively, compared to the same seasons last year. The increase is mainly due larger planted areas as delayed rains over parts of the country and localized flooding, prevented a potentially larger crop this year. There has been a steady increase in rice production in Viet Nam over the past eight years.

The 2013 maize output is estimated at 4.9 million tonnes, slightly above the record crop in 2012.

Lower rice exports in 2013

Despite the expectation of a record production in 2013 and high level of carryover stocks, the 2013 rice exports are forecast at 6.9 million tonnes, some 11 percent below the record level in 2012. The projected decrease is mainly attributed to the slow pace of exports

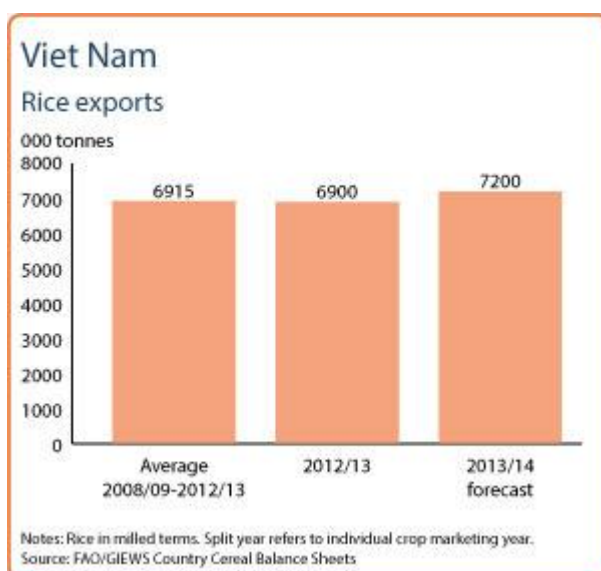


Viet Nam

Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	40 755	43 693	44 100	1
Maize	4 650	4 803	4 900	2
Millet	2	2	2	0
Others	0	0	0	0
Total	45 408	48 498	49 002	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



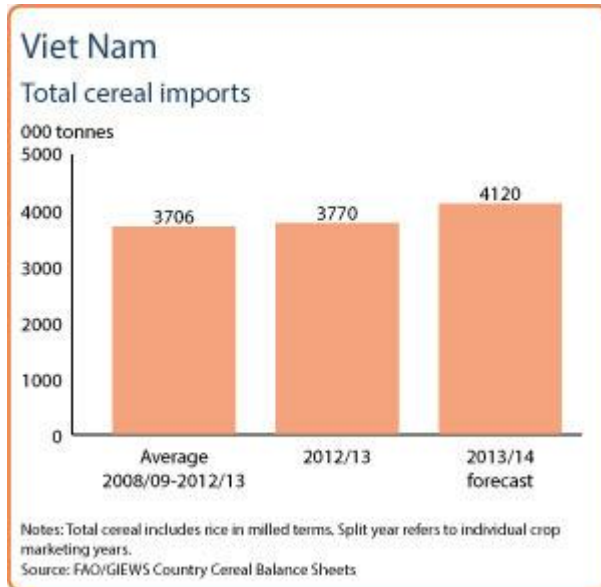
recorded to date. According to the General Statistics Office (GSO) rice exports between January and October 2013 reached 5.9 million tonnes, 14 percent below the level during the same period in 2012. For 2014, FAO anticipates rice exports to recover somewhat and reach 7.2 million tonnes.

Cereal imports of the country consist mostly of wheat and maize. During 2013/14 marketing year (July/June) they are forecast at 1.9 and 1.6 million tonnes, respectively. Overall, total cereal imports are forecast at 4 million tonnes, some 9 percent higher than the year before, but 11 percent below the previous five year average.

Domestic prices of rice remain generally stable at low levels

Domestic prices for rice, the main staple food in the country, which had decreased between November 2012 and July 2013, have strengthened moderately in October and November, despite the recent completion of summer/autumn and the ongoing 10th Month harvests, projected at record levels. The price increase is mainly attributed to the relatively strong export demand in recent months, in particular from China and the Philippines and localized crop damages, caused by Typhoon Wutip on 1 October in central and northern parts of the country, coupled with seasonal floods in the main growing region of the Mekong River Delta that disrupted milling activities. However, rice prices in November remained significantly below their levels a year earlier.

According to the GSO the overall consumer price index (year-on-year) in November 2013 stood at 5.78 percent.



Reference Date: 11-June-2013

FOOD SECURITY SNAPSHOT

- 2013 rice production forecast to reach near record level of 2012
- High level of rice exports expected to continue in 2013
- Domestic prices of rice remain generally stable at low levels

2013 rice production forecast to reach near record level of 2012

Harvesting of the winter/spring season paddy crop started in late March in the south and will be concluded in July in the north.

Favourable distribution of rainfall, both temporally and spatially, between October and early January, provided good conditions leading to increased plantings. However, erratic rains and hot weather in the following months, particularly over the main rice growing areas of Mekong River Delta in the south and Red River Delta in the north, combined with an outbreak of pests and diseases in March and April contributed to some damages to rice crop.

FAO preliminarily forecasts the 2013 winter/spring paddy production at 20.3 million tonnes, similar to last year's record level of the same season. Planting of the 2013 summer/autumn paddy is currently underway, while that of the 10th Month crop will start in mid-June and will continue into mid-October.

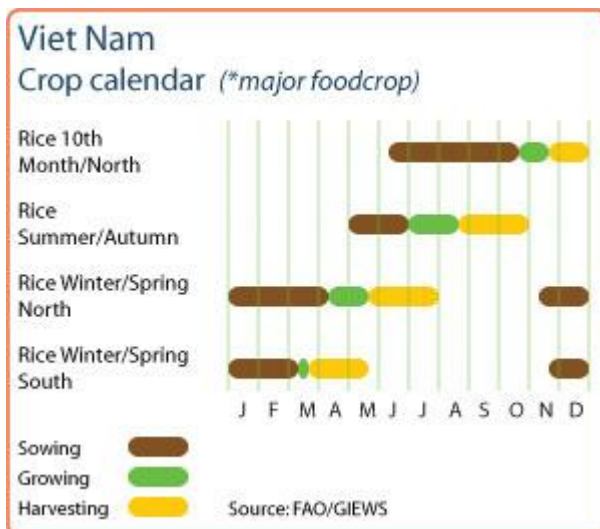
In aggregate, including winter/spring, summer/autumn and the 10th Month seasons, the 2013 paddy output is officially forecast at 43.5 million tonnes, slightly below the record crop the year before.

On average, almost entirely irrigated winter/spring paddy crop generally amounts to about 46 percent of the annual paddy production, while the remaining two seasons, summer/autumn and 10th Month account for 32 and 22 percent, respectively.

Sowing of the 2013 maize crop is ongoing and will be completed in October. A preliminary official estimate, as of mid-May, indicates that 646 300 hectares have been planted under maize crop, some 9.3 percent above area planted at the same period in 2012.

High level of rice exports expected to continue in 2013

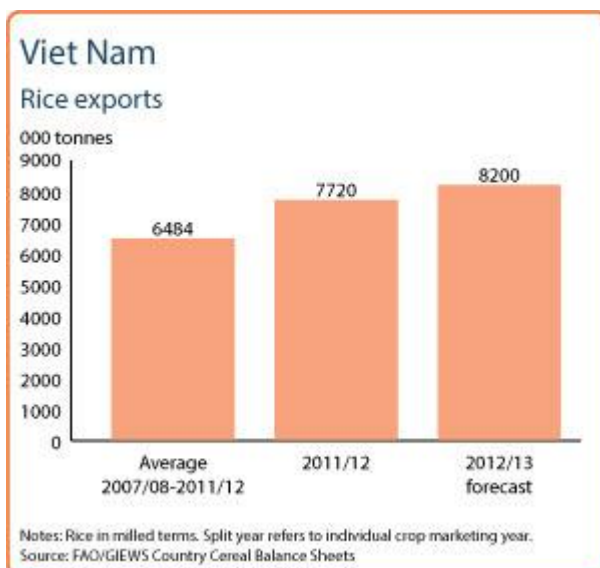
With the expectation of a bumper production in 2013 and high level of carryover stocks, the 2013 rice exports are forecast at 8.2 million tonnes, some 6 percent above the record level in 2012. According to the General Statistics Office (GSO) rice exports between January and May 2013 reached 3 million tonnes, slightly above the level during the same period in 2012. Cereal imports of the country consist mostly of wheat and maize and during 2012/13 marketing year (July/June) they are forecast at 2 and 1.2 million tonnes, respectively. Total cereal imports forecast at 3.87 million tonnes, are slightly lower than the year before, but remain above average.



Viet Nam Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	40,735	43,662	43,500	0
Maize	4,650	4,803	5,100	6
Millet	2	2	2	0
Others	0	0	0	0
Total	45,387	48,467	48,602	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

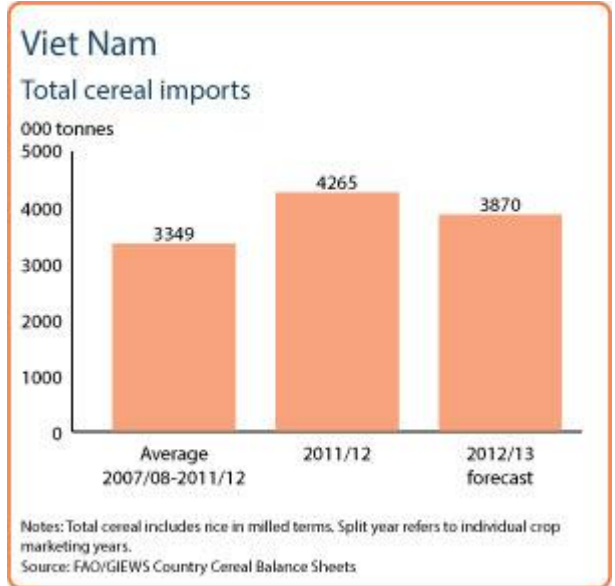


Domestic prices of rice remain generally stable at low levels

Domestic prices for rice, the main staple food in the country, which had decreased between November 2012 and February 2013, have remained generally stable since then. Downward pressure on prices from the ongoing 2012/13 winter-spring harvest was partially offset by government large scale procurement programme in March.

However, rice prices in May were still at relatively low levels and the Government has recently announced plans to procure additional quantities of rice from the 2013 summer/autumn crop.

According to the GSO the overall consumer price index (year-on-year) in May 2013 stood at 6.36 percent.



Reference Date: 17-January-2013

FOOD SECURITY SNAPSHOT

- Good rains at the start of the 2012/13 cropping season
- The 2012 paddy harvest estimated to reach new record highs
- High level of rice exports forecast to continue in 2012
- Domestic prices of rice come down in November and December, after a steady rise since July 2012

Good rains at the start of the 2012/13 cropping season

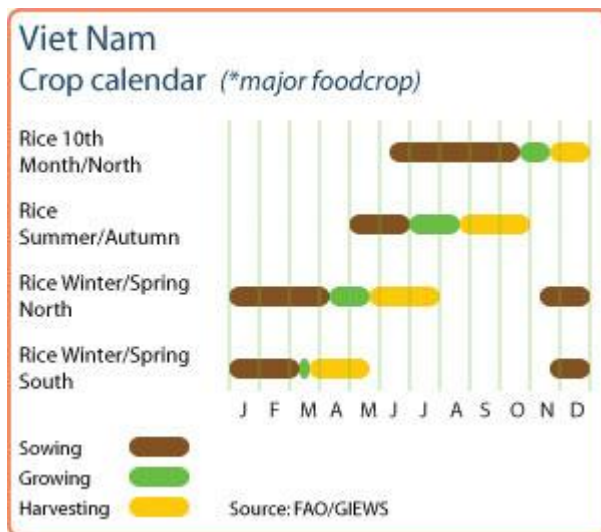
Planting of the 2012/13 winter/spring paddy crop, generally begins in mid-November and continues until early April. Favourable rains since November, particularly over large parts of Mekong River Delta, a major rice growing region in southern Viet Nam, improved soil moisture and provided good conditions that allowed farmers to start plantings earlier than normal. A preliminary official estimate indicates that as of mid-December 1.29 million hectares have been planted under winter/spring paddy, well above the 875 300 hectares planted at the same period in flood-affected 2011 and 11 percent above the good plantings in 2010. The passing of typhoon Son-Tinh (Ofel) in late October, resulted in landslides and localised flooding, affecting an estimated 27 786 hectares of rice crop along north-eastern coast of the country. However, the overall effect on national rice production is expected to be minimal. Following, the good rains early indications for the 2012/13 winter/spring paddy crop point to an increase in plantings.

Record 2012 paddy harvest estimated

Based on the recent estimates from General Statistic Office of Viet Nam (GSO), the 2012 total rice production (in paddy terms), including winter/spring, summer/autumn and the 10th Month paddy crop, is set at a record level of 43.7 million tonnes, some 3 percent up on 2011 another record harvest. This mainly reflects a slight expansion of 1.3 percent in the planted area and higher yields following adequate input supply during the growing season and favourable weather. The biggest increase in production is estimated to come from the summer/autumn (+635 100 tonnes) and winter/spring (+510 300 tonnes) harvests compared to the previous year's output of the same seasons. On average, almost entirely irrigated winter/spring generally amounts to about 46 percent of the annual paddy production, while the remaining two seasons summer/autumn and 10th Month account for 32 and 22 percent, respectively. There has been a steady increase in rice production in Viet Nam over the past several years. The 2012 maize output is officially estimated at 4.8 million tonnes, slightly below the record crop in 2011.

High level of rice exports forecast to continue in 2013

Exports for rice in 2013 are forecast to be similar to the estimated record level of about 7.7 million tonnes in 2012. Cereal imports of the country consist mostly of wheat and maize. The imports for 2012/13 marketing year (July/June) for both commodities are forecast at 2.6

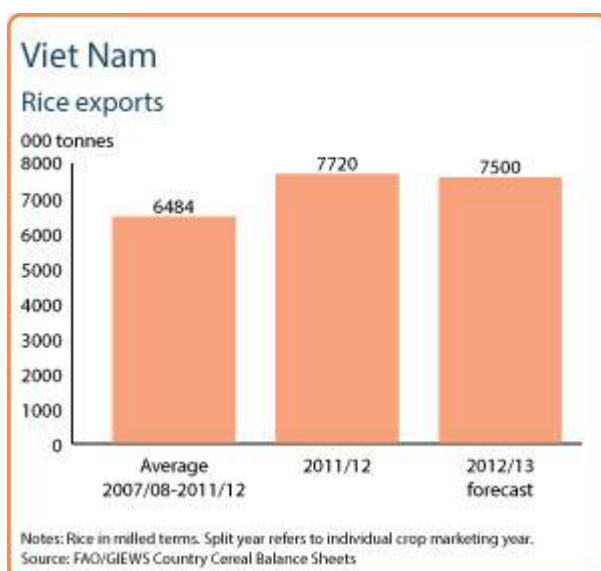


Viet Nam

Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Rice (paddy)	39,191	42,325	43,670	3
Maize	4,550	4,837	4,803	-1
Millet	2	2	2	0
Others	0	0	0	0
Total	43,743	47,164	48,475	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

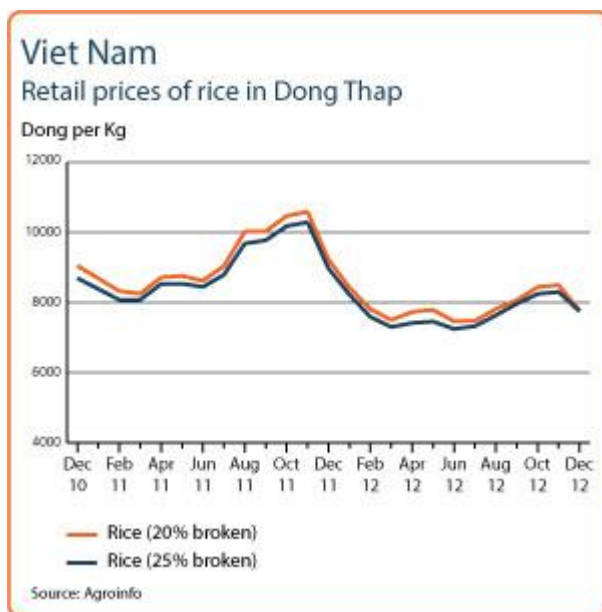
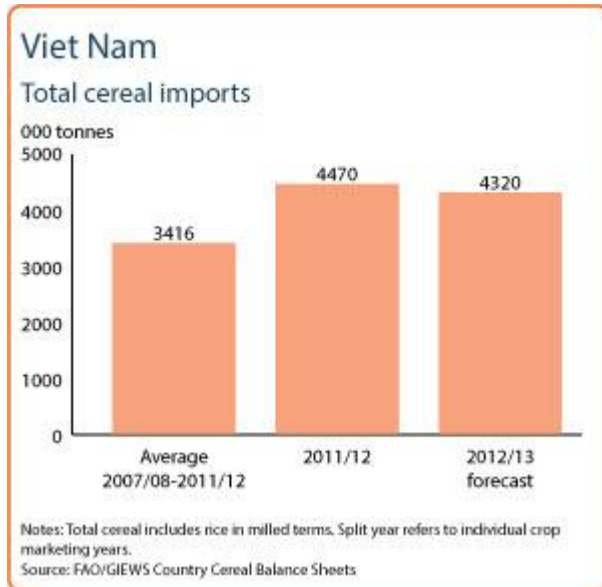


and 1.1 million tonnes, respectively. Total cereal imports are forecast to decrease slightly from the estimated level of 2011/12 but remain at high level.

Domestic prices of rice come down in November and December, after a steady rise since July 2012

Domestic prices for rice, the main staple food in the country, which had steadily risen since July 2012, declined in November and December. The recent downward pressure is mainly attributed to lower international prices and the estimate of a record 2012 10th Month crop. The December 2012 prices of 20 percent and 25 percent broken rice in the Dong Thap market were about 26.6 and 24.7 percent below its peak level in November 2011 and about 15.7 and 13.6 percent lower than in December 2011.

According to the GSO the consumer price index (a year-on-year increase) in December 2012 was 9.2 percent, marginally down from the 9.4 percent level in November 2012.



Reference Date: 31-July-2012

FOOD SECURITY SNAPSHOT

- 2012 paddy rice production forecast marginally above the record level of 2011
- High level of rice exports expected to continue in 2012
- Domestic price of rice decreased slightly in recent months after it reached a record level in November 2011

The 2012 paddy rice production forecast to reach new record highs

Harvesting of the 2012 winter/spring season paddy crop is just concluded. Output of this season generally account for about 50 percent of the annual paddy production. According to the General Statistics Office of Viet Nam (GSO) the 2012 winter/spring paddy production is preliminary estimated at a record level of 20.3 million tonnes, some 2.4 percent above last year's same season bumper output. This reflects an increase in plantings in response of high market prices for the commodity at planting period, coupled with generally favourable weather conditions during the season and adequate input supplies.

Planting of 2012 summer/autumn paddy was completed in June, while that of the 10th Month crop began in mid-June and will continue into mid-October. These two harvests (summer/autumn in September/October and the 10th Month in December), make up the other half of the total paddy production. Rains throughout the country, have been so far, beneficial for planting and early planted crops.

The 2012 rice paddy production is expected to continue the steady increasing trend of the past several years and the aggregate output is officially forecast at 42.5 million tonnes, marginally above last year's record level.

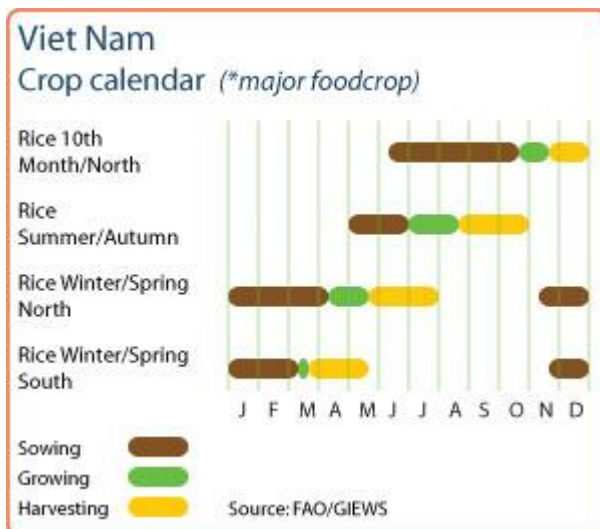
Production of maize in 2012 is expected to increase at 4.8 million tonnes, 3 percent over the previous year's above-average output.

Bumper 2011 paddy crop, despite severe flooding during the season

In spite of localized flood damage to the 2011 summer/autumn paddy crop last October, the annual aggregate production in 2011 was estimated at a bumper level of 42.3 million tonnes (equivalent to 28 million tonnes of milled rice), or 6 percent higher than the previous year's harvest. The increase was due to rise in plantings, in response to attractive international prices, as well as higher average yield of the summer/autumn paddy in the Mekong Delta.

High level of rice exports expected to continue in 2012

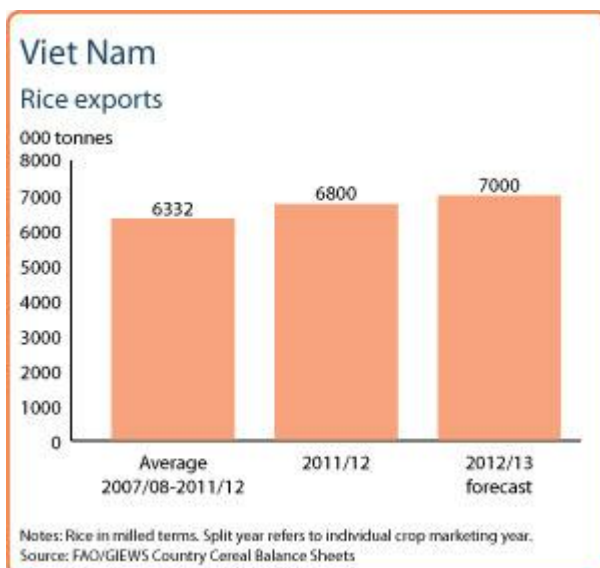
Viet Nam is the world's second-largest rice exporter following Thailand. With the expectation of a record production in 2012, the 2012 rice exports at seven million tonnes are forecast to rise slightly above 2011 high level. Cereal imports consist mostly of wheat and maize. The imports for 2012/13 marketing year (July/June) for both



Viet Nam Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	39 187	42 324	42 500	0
Maize	4 532	4 700	4 800	2
Millet	2	2	2	0
Others	0	0	0	0
Total	43 721	47 026	47 302	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

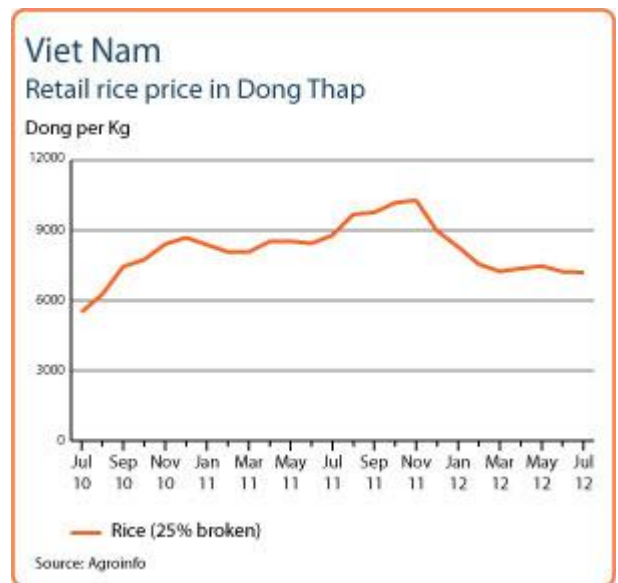
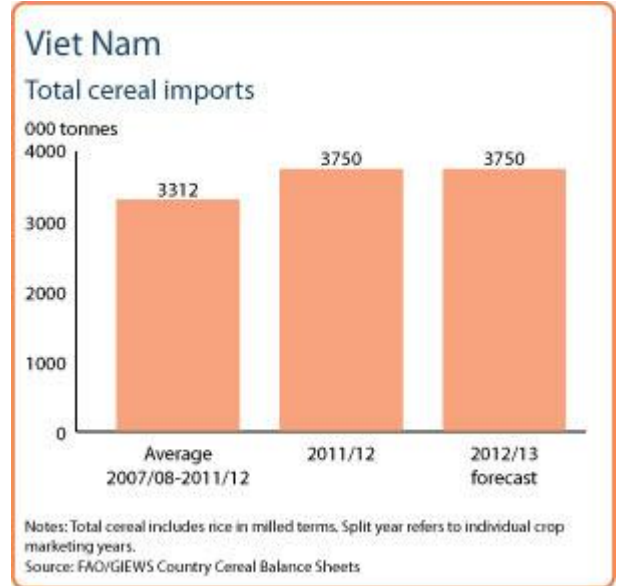


commodities are forecast at 1.5 and 1.6 million tonnes, respectively. Cereal imports are forecast to be lower in 2012/13 possibly due to higher than usual imports of wheat in 2010/11 marketing year.

Domestic price of rice decreased slightly in recent months after it reached a record level in November 2011

Domestic prices for rice, the main staple food in the country, has been decreasing since December 2011, following better than expected harvest estimates of the 2011 10th month and winter/spring crops, as well as the good prospects for the main 2012 summer/autumn crop. The July 2012 price of 25% broken rice in the Dong Thap market is about 30 percent below its peak level in November 2011 and 18 percent lower than in July 2011.

The consumer price inflation (a year-on-year increase) in June 2012 was 12.2 percent, marginally down from the 12.5 percent level in May 2012 (General Statistics Office of Viet Nam).



Reference Date: 15-February-2012

FOOD SECURITY SNAPSHOT

- 2011 paddy rice production estimated to reach record level at 42 million tonnes
- High level of rice exports expected to continue in 2012
- Domestic price of rice came down sharply in last two months after reaching a record level

2011 paddy rice production estimated to reach record level at 42 million tonnes

Planting of winter/spring paddy began in mid-November and will continue until early- April under normal to above normal rainfall conditions. Output of winter/spring season generally amounts to about 50 percent of the annual paddy production. The remaining two harvests (summer/autumn in September/October and the 10th Month in December), make up the other half.

The 2011 harvest of the 10th Month paddy rice was completed by the end of the year. Rainfall was generally satisfactory in most regions, except for the south-western part of the country. Heavy rains since July reaching intense downpours in October caused severe flooding in the central region of the country. Some 330 000 people were affected and a total of 28 813 hectares of standing paddy crop damaged. In spite of this localized flood damage to the summer/autumn paddy crop, the annual aggregate production in 2011 is estimated by the Ministry of Agriculture at a record level at 42.3 million tonnes (equivalent to 28 million tonnes of milled rice), or 6 percent higher than the previous year's bumper harvest. The increase is characterized by favourable winter-spring harvest and rise in the average yield of the summer/autumn paddy in the Mekong Delta, primarily in response to the attractive international rice prices. There has been a steady increase in rice production in Viet Nam over the past several years.

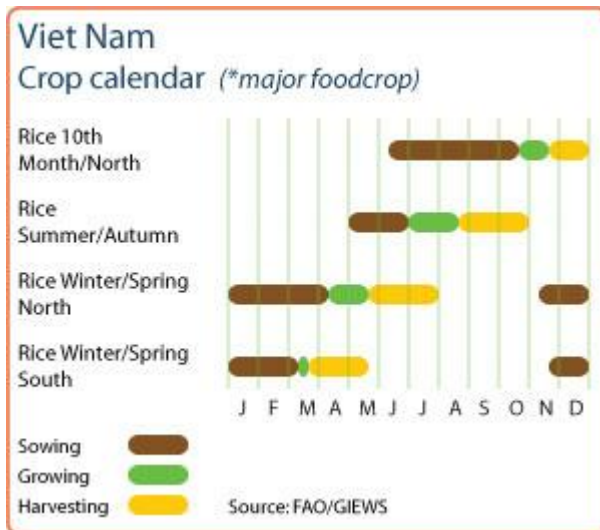
Production of maize in 2011 reached 4.8 million tonnes, 3 percent over the previous year's above-average output.

High level of rice exports expected to continue in 2012

Viet Nam is the world's second-largest rice exporter following Thailand. With the expectation of a good production in 2011, the 2012 rice exports at seven million tonnes are forecast to rise slightly above this year's record level. Cereal imports consist mostly of wheat and maize. During the 2010/11 marketing year (July/June) both commodity imports reached record levels at 2.5 and 1.5 million tonnes, respectively. Cereal imports are forecast to be lower in 2011/12 possibly due to higher than usual imports of wheat in 2011.

Domestic price of rice came down sharply in last two months after reaching a record level

Domestic prices for rice, the main staple food in the country, came down sharply with the better than expected harvest estimates of the main wet season paddy crop. The prices had been rising since July

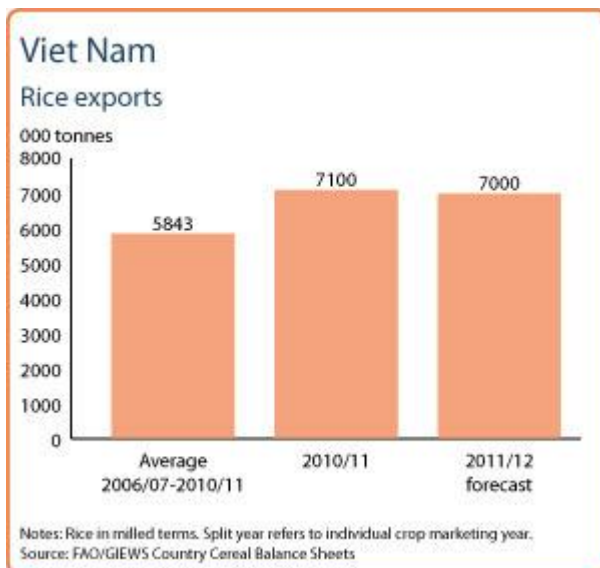


Viet Nam

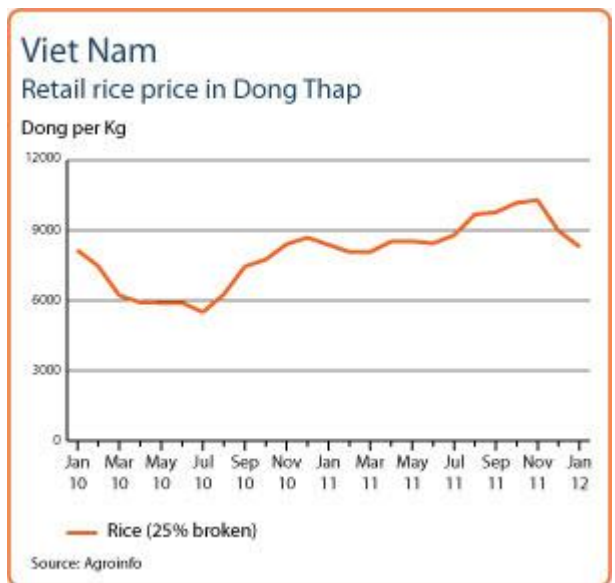
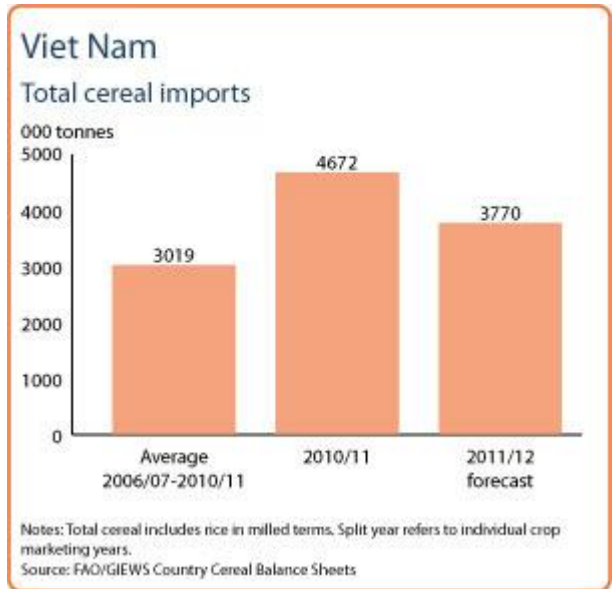
Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Rice (paddy)	37 892	39 989	42 324	6
Maize	4 363	4 653	4 800	3
Millet	2	2	2	0
Others	0	0	0	0
Total	42 257	44 644	47 126	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



2010 and reached record levels in November 2011. The January price of 25% broken rice in the Dong Thap market was about 19 percent below the level in November. However, Viet Nam still struggles with the fast rising prices; the consumer price inflation (a year-on-year increase) in January 2012 was 17.27 percent slightly down from the 20 percent level in August 2011 (General Statistics Office of Viet Nam). The declining purchasing power of the poor is expected to affect food security of the most vulnerable people.



Reference Date: 14-December-2011

FOOD SECURITY SNAPSHOT

- 2011 paddy rice production estimated to reach record level at 42 million tonnes
- High level of rice exports expected to continue in 2012
- Domestic price of rice reached record level in November 2011

2011 paddy rice production estimated to reach record level at 42 million tonnes

The 2011 harvest of the 10th Month paddy rice is currently underway and planting of the winter/spring season paddy began in mid-November and will continue until early- April. Rainfall has been generally satisfactory in most regions, except for the south-western part of the country. Heavy rains since July reaching intense downpours in October caused severe flooding in the central region of the country. Some 330 000 people were affected and a total of 28 813 hectares of standing paddy crop damaged. In spite of this localized flood damage to the summer/autumn paddy crop, the annual aggregate production in 2011 is estimated by the Ministry of Agriculture to reach a record level at 42 million tonnes (equivalent to 28 million tonnes of milled rice), or 5 percent higher than the previous year's bumper harvest. The increase is characterized by favourable winter-spring harvest and rise in the average yield of the summer/autumn paddy in the Mekong Delta, primarily in response to the attractive international rice prices. Output of winter/spring season generally amounts to about 50 percent of the annual paddy production. The remaining two harvests (summer/autumn in September/October and the 10th Month in December), make up the other half. There has been a steady increase in rice production in Viet Nam over the past several years.

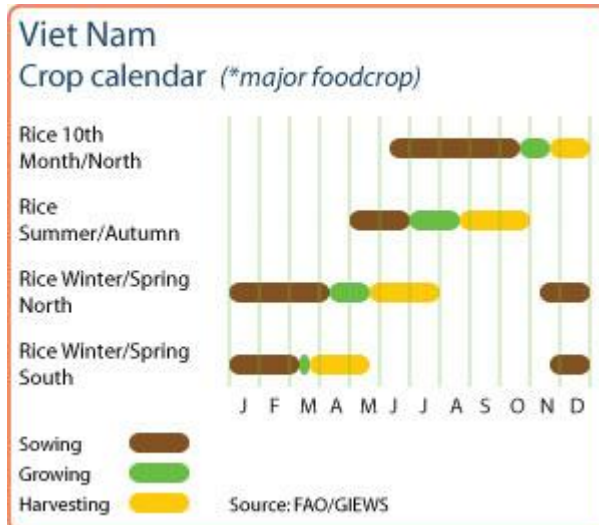
Production of maize in 2011 reached 4.8 million tonnes, 3 percent over the previous year's above-average output.

High level of rice exports expected to continue in 2012

Viet Nam is the world's second-largest rice exporter following Thailand. With the expectation of a good production in 2011, the 2012 rice exports at 7.3 million tonnes are forecast to rise slightly above this year's record level. Cereal imports consist mostly of wheat and maize. During the 2010/11 marketing year (July/June) both commodity imports reached record levels at 2.5 and 1.5 million tonnes, respectively.

Domestic price of rice reached record level in November 2011

Domestic prices for rice, the main staple food in the country, have been rising since July 2010 and reached record levels in November 2011. The retail price of rice in Dong Thap market is 23 percent above its level a year ago and 86 percent up from its high in July 2010. Despite new harvest of the 2011 summer/autumn rice and the

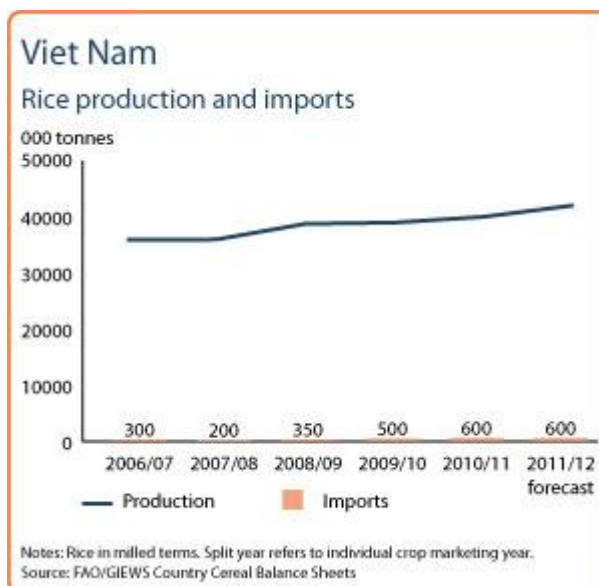


Viet Nam

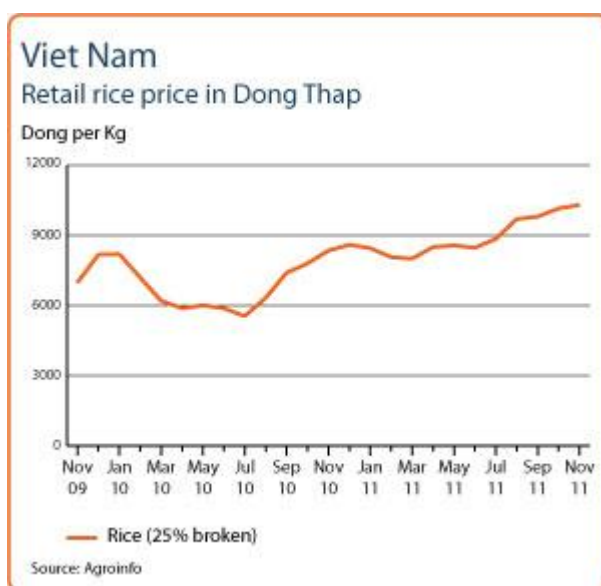
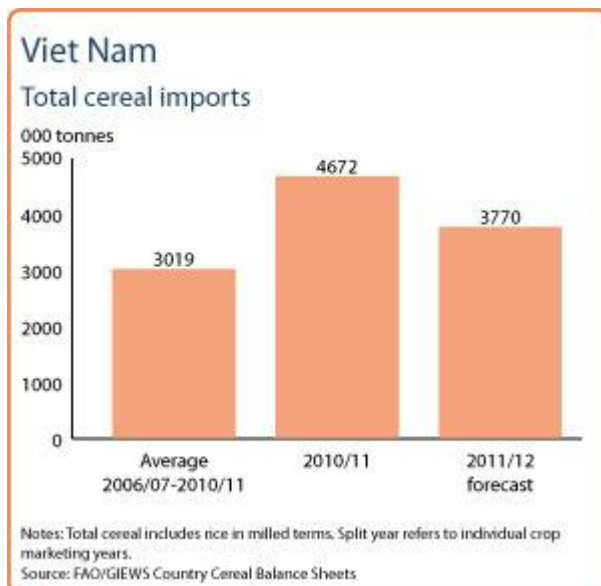
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	37 892	39 989	42 000	5
Maize	4 363	4 653	4 800	3
Millet	2	2	2	0
Others	0	0	0	0
Total	42 257	44 644	46 802	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



ongoing harvesting of the minor 10th Month crop, higher domestic prices are supported by strong export demand. Export prices of Vietnam rice (Ho Chi Minh 25% broken), also rose from the beginning of July following the general trend in the international market but the increase is less marked than for domestic prices. The general inflation eased slightly for the third month in November, but Viet Nam still struggles with the fast rising prices; the consumer price inflation in August 2011, a year-on-year increase, is estimated at 20 percent. The declining purchasing power of the poor is expected to affect food security of the most vulnerable people.



Reference Date: 26-May-2011

FOOD SECURITY SNAPSHOT

- 2011 aggregate paddy harvest target set at another record level
- High level of rice exports set to continue in 2011 given the strong international demand for the commodity
- Currently the local retail rice prices are at all time high levels

2011 rice production aims to reach record level

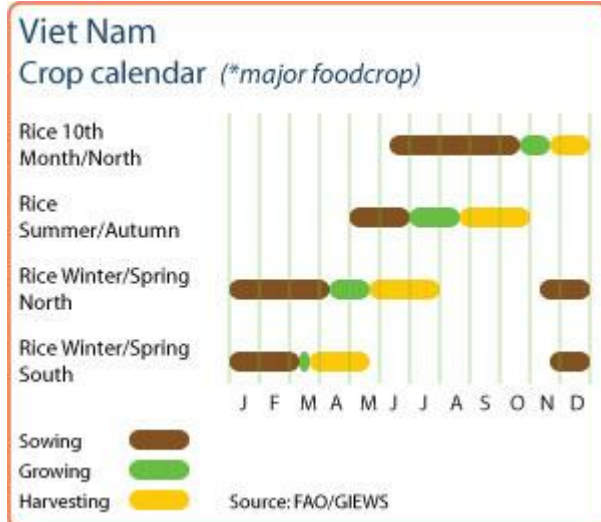
Harvesting of the winter/spring season paddy crop started in late March in the south and will be concluded in July in the north. Output of this season generally amounts to about 50 percent of the annual paddy production. Based on the generally favourable weather conditions, input supply situation and market prices for the commodity, FAO preliminarily forecasts a slight improvement of about 1.5 percent in the harvest of this season at about 19.5 million tonnes. The Government has announced a new production target for this year, which is one million tonnes higher than the last year's outcome. Total paddy production for 2010 has been officially estimated at a record level of about 40 million tonnes, 3.3 percent increase over the previous year's bumper output. There has been a steady increase in rice production in Viet Nam over past several years.

High level of rice exports set to continue in 2011

Viet Nam is the world's second-largest rice exporter following Thailand. Rice exports during 2010 were estimated at a record level of about 7 million tonnes. With the expectation of another good production in 2011, the rice exports in 2011 are expected to increase and stay above 7 million tonnes mark. Cereal imports, consisting mostly of wheat (about 1.8 million tonnes) and maize (about 500 000 tonnes) are estimated to decline due to high level of carryover stocks of wheat and improved maize harvest this year.

Domestic rice prices in April are near all time high

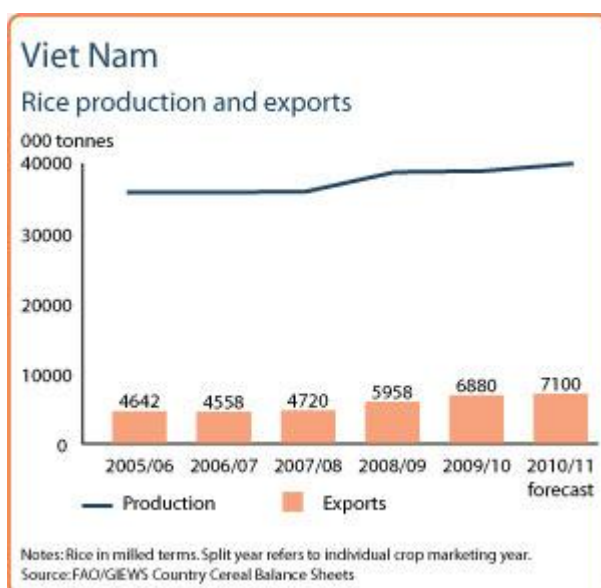
Domestic retail price of rice in the major Dong Thap market recorded a 6 percent increase in April recuperating almost all its losses from January to March 2011 with the harvest of the winter-spring crop. Domestic prices are currently at the high level achieved during the soaring food prices episode in May 2008 and only slightly below the record reached last December. Export prices of Vietnam (Ho Chi Minh 25% broken), also rose in the second half of April but the increase is less marked than for domestic prices because the depreciation of the US dollar in which export prices are quoted. For a net exporting country, rising prices of rice is good news. However, it can have an adverse impact domestically on consumers, especially the low income population. Stronger safety-net programs are required to counteract the impact of rising food prices and generally high consumer price inflation on food security of the most vulnerable people.



Viet Nam Cereal production

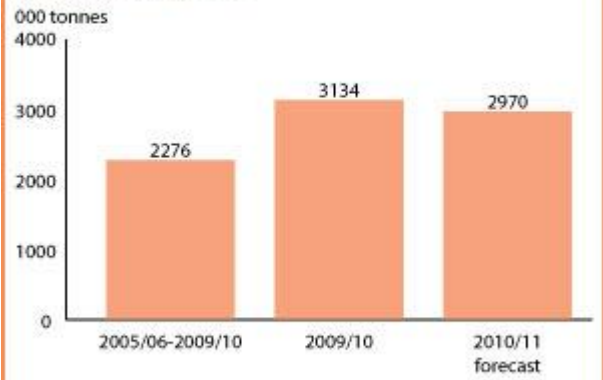
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	37049	38896	39940	3
Maize	4190	4432	4653	5
Millet	2	2	2	0
Others	1	0	0	0
Total	41242	43329	44595	3

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets



Viet Nam

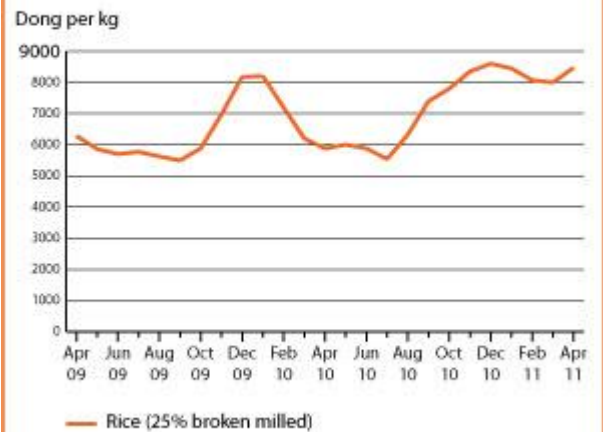
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Viet Nam

Retail rice price in Dong Thap



Source: Agroinfo

Reference Date: 2-September-2010

FOOD SECURITY SNAPSHOT

- 2010 aggregate paddy harvest expected to be near last year's record level.
- Export market for rice remains strong during 2010.
- Domestic rice prices have come down and seem to be stabilized.

2010 rice production expected to be near last year's record harvest

Harvesting of the autumn and summer paddy rice is currently underway. Total production of this crop is anticipated to be good although drought during the early growing period will have some negative impact on yields. The winter/spring season harvest generally amounts to about 50 percent of the annual paddy production. The remaining two harvests (Autumn/Summer in September/October and the 10th Month in December), make up the other half. FAO forecasts the aggregate 2010 national paddy output at about the last year's record level of 39 million tonnes reflecting larger plantings in response to favourable domestic and international rice prices.

High level of rice exports are anticipated during 2010

Viet Nam is the world's second-largest rice exporter after Thailand. Rice exports during 2009 were estimated at a record level of about 6 million tonnes. They are expected to remain strong during this year as well. Cereal imports remain unchanged and consist mostly of wheat (about 1.1 million tonnes) and maize (about 700 000 tonnes).

Rice prices have come down and stabilized in recent months

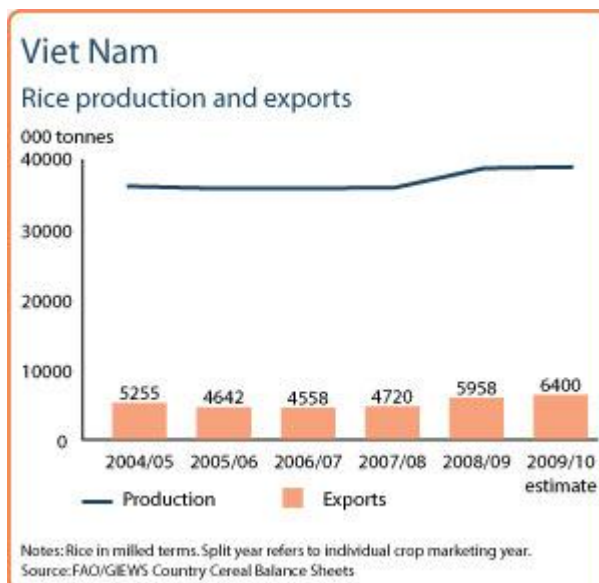
Domestic prices of rice, the main staple food in the country, have fallen in last few months since December 2009 following the trend in the international export prices, especially the Thai rice price. They seem to have stabilized now following the Vietnam Food Association's policy of stockpiling 1.5 million tonnes of rice from the main 2010 winter/spring harvest from its members. Earlier in the year the Government had reduced the export price for the 25 percent broken rice to USD 350 per tonne to increase rice exports and in turn reduce domestic stocks.



Viet Nam Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	37049	38896	39100	1
Maize	4189	4400	4750	8
Millet	2	2	2	0
Others	1	0	0	0
Total	41241	43297	43852	1

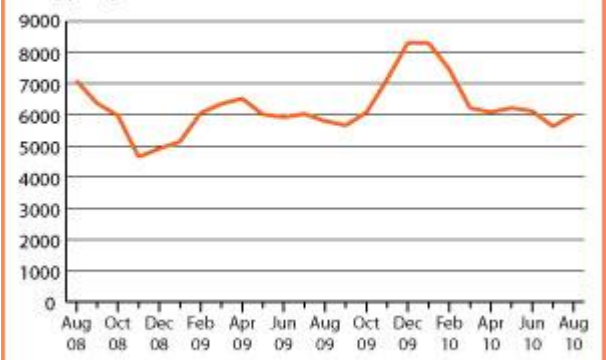
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Viet Nam

Retail rice price in Dong Thap

Dong per kg



Source: Agriinfo

Reference Date: 24-May-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2010 winter/spring paddy in spite of drought in parts of the country.
- Export market for rice remains strong during 2010.
- Domestic rice prices are coming down but still remain high.

Favourable prospects for the 2010 winter/spring paddy in spite of drought in parts

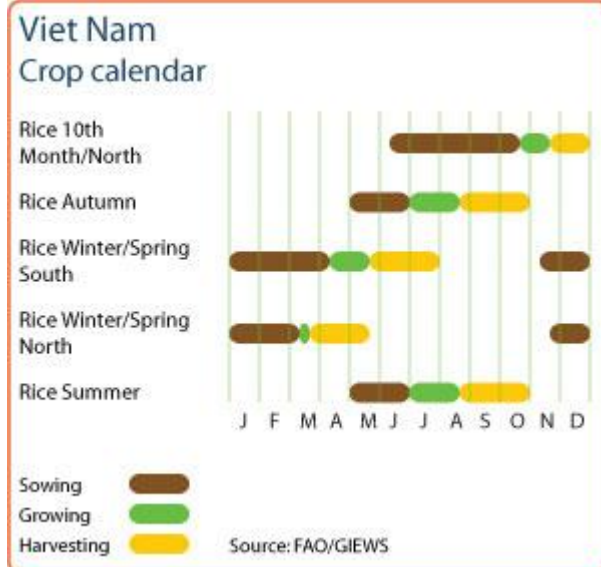
Harvesting of the winter/spring paddy is completed by now in the South and will continue until July in the North. Total production of this crop is anticipated to be good although drought during the growing period has seriously affected agricultural areas in the mountainous provinces of the north and some parts of central Vietnam. The winter/spring season harvest generally amounts to about 50 percent of the annual paddy production. The remaining two harvests (Autumn/Summer in September/October and the 10th Month in December), make up the other half. FAO forecasts the aggregate 2010 national paddy output at about the last year's record level of 39 million tonnes reflecting larger plantings in response to favourable domestic and international rice prices and assuming good weather conditions during the coming cropping seasons.. Planting of the 2010 Summer/Autumn seasons paddy crop is currently underway.

High level of rice exports are anticipated during 2010

Viet Nam is the world's second-largest rice exporter after Thailand. Rice exports during 2009 were estimated at a record level of about 6 million tonnes. They are expected to remain strong during this year as well. Cereal imports remain unchanged and consist mostly of wheat (about 1.1 million tonnes) and maize (about 700 000 tonnes).

Rice prices are coming down but still remain high

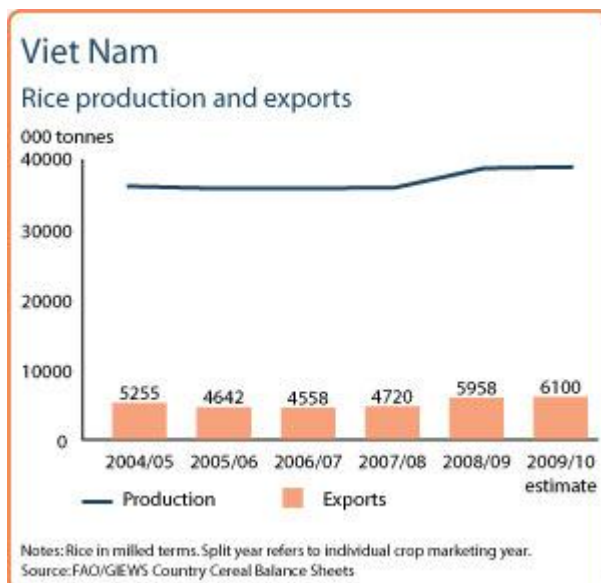
Domestic prices of rice, the main staple food in the country, have been falling for last few months since December 2009 following the trend in the international export prices, especially the Thai rice price. In order to stabilize the domestic price the Vietnam Food Association has instructed its members to stockpile 1.5 million tonnes of rice from the main 2010 winter/spring harvest. The Government has reduced the export price for the 25 percent broken rice to USD 350 per tonne to increase rice exports and in turn reduce domestic stocks.



Viet Nam Cereal production

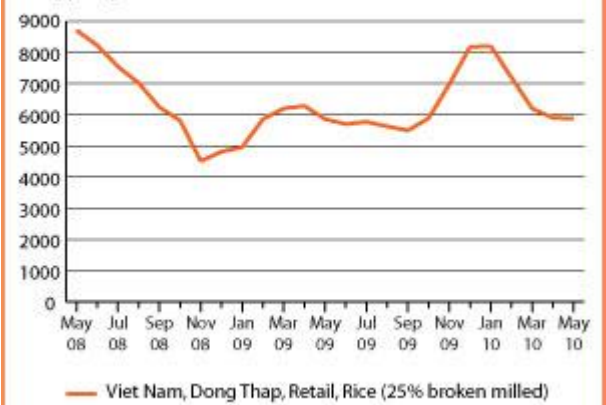
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	37049	38896	38800	0
Maize	4175	4400	4750	8
Millet	2	2	2	0
Others	1	0	0	0
Total	41227	43297	43552	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Viet Nam Retail rice price

Dong per kg



— Viet Nam, Dong Thap, Retail, Rice (25% broken milled)

Source: Agroinfo

Reference Date: 8-January-2010

FOOD SECURITY SNAPSHOT

- Paddy harvest of 2009 is estimated at a record level.
- Export market for rice remains strong during 2010.
- Domestic rice prices remain high and are rising due to large imports by other Asian countries.

Record paddy harvest in 2009

The aggregate 2009 paddy output is estimated at a record level of 39 million tonnes, slightly above the previous year's bumper harvest reflecting larger plantings in response to high domestic and international rice prices and favourable weather conditions during the cropping season. The output of the 2009 maize crop is estimated at 3.73 million tonnes, also slightly above the average of the previous five years. Planting of the 2010 winter season paddy crop is underway under near normal rainfall conditions.

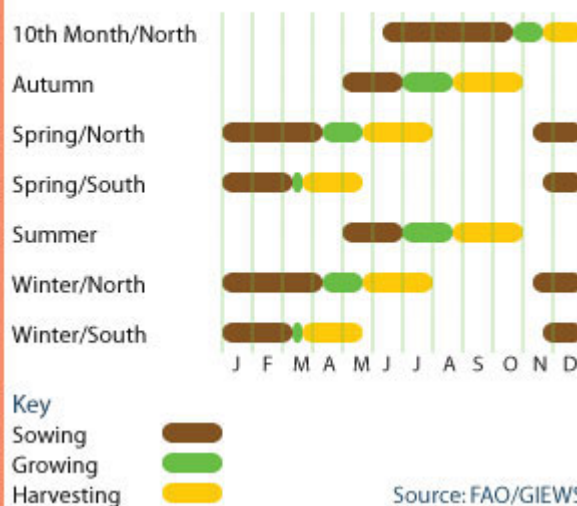
High level of rice exports are anticipated during 2010

Viet Nam is the world's second-largest rice exporter after Thailand. According to the Vietnam Food Association by 25 November 2009 Vietnam had signed contracts to export more than 6.72 million tonnes of rice of which 5.6 million tonnes were already shipped and the rest was planned to be delivered in December. Exports in 2010 are expected to be around 6 million tonnes, slightly lower than the record level of 6.7 million in 2009. Cereal imports remain unchanged and consist mostly of wheat (about 1.1 million tonnes) and maize (about 700 000 tonnes).

Rice prices not only remain high but are also rising due to strong export demand

Domestic prices of rice, the main staple food in the country, have been rising for last few months and the latest (as of 6 January 2010) retail price of ordinary rice in Hanoi market reached VND 11000/kg, some 31 percent increase from October 2009 and surpassing the last peak of May 2008. The recent rise in domestic market is consistent with the changes in the international rice price especially that of Thailand 100% B rice, due to the strong demand in the region. In spite of enough food supply nationally, the price impact on food consumption of the vulnerable population is believed to be substantial.

Crop calendar (refers to rice only) Viet Nam



Source: FAO/GIEWS

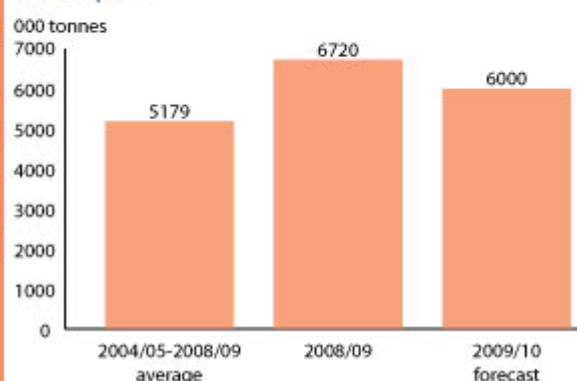
Viet Nam

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (in milled terms)	24332	25767	26013	1
Maize	3653	3696	3726	1
Rye	1	0	0	0
Others	0	0	0	0
Total	27985	29463	29739	1

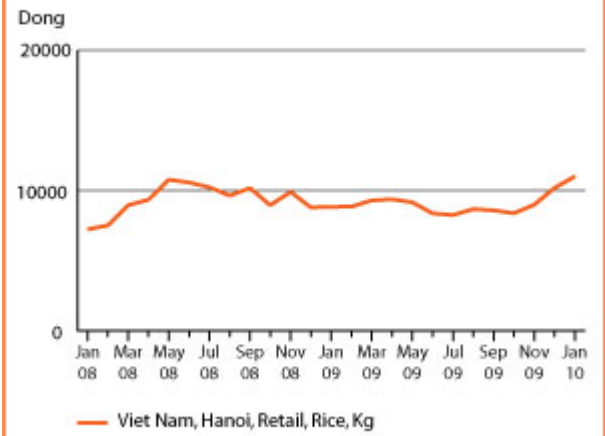
Note: percentage change calculated from unrounded data.

Rice exports



Source: FAO/GIEWS Country Cereal Balance Sheets

Viet Nam Retail rice price



Source: Agroinfo