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# Vietnam

## Grain and Feed

### December Rice Update

### 1999

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**Report Highlights:** This report presents an update of the PS&D, as well as several tables of production data (by crop, by province), trade (by export market and quality), and price information from the Mekong Delta provinces. An overview of damage to rice and irrigation infrastructure from the recent flooding in the central provinces is provided.

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Includes PSD changes: Yes  
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## EXECUTIVE SUMMARY

Vietnam's rocketing export engine will sputter to a stellar close with about 4.35MMT, yet another in a long succession of records. Record 1999 campaign exports are supported by record production for the MY 1998/99 season. Once again, the dynamism of Vietnam's two large rice bowls in the Mekong River Delta (MRD) and the Red River Delta (RRD) have sustained the country. Late-season Summer-Autumn (S-A) expansion in the MRD helped to boost 1998/99 production to about 30.5MMT (paddy basis). Despite recent devastating localized flooding in the seven Central Coastal provinces, total VN outturn of the upcoming Lua-Mua crop is projected at about last years's level. Vietnam is confident of another banner year in the new millennium, but will probably not be able to replicate this past year's effort either on production or exports. Policy changes for the coming year are yet to be thrashed out by the government, but will likely demonstrate greater flexibility.

## RICE PRODUCTION

**Vietnam posts another record rice harvest in 1998/99, as the MRD goes gangbusters for the S-A crop.** Farmers harvested a record 8.6 MMT of S-A paddy, an increase of more than 1.0 MMT compared with the previous year's crop, on expanded area and higher yields in the strategic MRD, and improved yields in North Central Coast provinces. In the MRD, early rains enabled a harvest of the S-A crop one month earlier than usual. This encouraged planting of the late S-A crop (or "Autumn-Winter" crop. Late S-A (A-W) rice area expanded to nearly 390 THa, an increase of 25 percent above same crop last year. In some MRD provinces, e.g., Soc Trang, Kien Giang, An Giang, and Can Tho, improvements in irrigation infrastructure and development of short-season varieties enabled farmers to maximize production by expanding area planted to late S-A rice crop. Typically, the trade-off is between late S-A (A-W) or Lua Mua. Late S-A rice varieties are characterized by higher yields and shorter growing season, whereas Lua-Mua rice is higher quality, longer duration (five months) lower-yielding fragrant varieties, generally not for export. Vietnam's rice accounting practice places the late S-A crop in the S-A, whereas the Lua-Mua is a separate crop, the last of the year. USDA convention identifies Lua Mua as the first crop of the new year.

**Table 1: VN 1998 & 1999 Summer-Autumn Rice Crop**

	Areas (THa)		Yield (MT/Ha)		Prod. (TMT)	
	1998	1999	1998	1999	1998	1999
Northern Viet Nam	135	140	2.46	2.80	332	392
North Mountain	0	0	0.00	0.00	0	0
RRD	0	0	0.00	0.00	0	0
North Central Coast	135	140	2.46	2.80	332	392
Southern Viet Nam	1,983	2,160	3.63	3.80	7,204	8,208
South Central Coast	146	144	4.09	3.35	595	482
North East South	80	85	2.88	2.75	229	234
MRD	1,758	1,931	3.63	3.88	6,380	7,492

TOTAL VIETNAM	2,118	2,300	3.56	3.74	7,537	8,600

Source: MARD & FAS/VN

**VN Central Coast Provinces punished by worst flooding in memory.** Heavy rains lashed central provinces from Nov. 4-11, 1999, causing severe damage to Quang Binh, Quang Tri, Thua Thien Hue, Da Nang, Quang Nam, Quang Ngai and Binh Dinh. According to a recent GVN report, the loss is estimated at VND3,500 billion (or, about US\$250 million).

**Flooding caused enormous losses for the agricultural sector in the region.** Rice losses locally were devastating, but minimal in the broader context of national supplies. Farmers were caught in the middle of harvesting the Lua Mua crop. Official estimates place the loss of rice at about 12 THa. According to MARD, the flood swept away about 30TMT of paddy and seed rice preserved for the upcoming 1999/00 W-S rice crop. A total of about 48THa of agricultural crops were affected, in addition to the loss of about 325,000 head of various livestock (e.g., hogs, cattle, buffalo).

**Infrastructure such as reservoirs, dykes and irrigation systems were seriously damaged.** This damage will affect agricultural production in the coming year. There are about 2,700 medium and small-scale irrigation networks and 544 reservoirs that supply 115THa of agricultural land in the region. According to the Department of Water and Irrigation Construction and Management (MARD), about 3,400 km of canals and small dykes have been damaged. The estimated cost of repair is VND300 billion (or, US\$21 million). With the onset of dry season, provincial authorities are worried that the water level in rivers and reservoirs will drop rapidly without prompt attention. Farmers in Quang Tri province speculate that production of the 1999/00 W-S rice crop will drop considerably if the irrigation systems are not restored in time. Government will likely meet only about a third of the amount (VND328billion) requested by provinces this season to restore all irrigation systems in the region.

**Despite severe flooding and destruction of some production areas in the Central Coast provinces, a surge in the RRD harvest will assure a bumper 1999/00 Lua Mua crop.** VN has sown an estimated 2,366 THa for 1999/00, marginally less than last year's crop. Conversion of land in the MRD from Lua Mua to late S-A is a contributing factor, although masked in the aggregate numbers. Farmers in the north have already harvested their Lua Mua rice crop. According to MARD, by November 25, about 1,237 THa were harvested in northern provinces, of which 526THa were in the Red River Delta (RRD). Although there was some expansion in area in the North Mountain provinces, dry conditions weighed on yields in Phu Tho, Quang Ninh, Vinh Phu provinces. Most of the increase over last season is attributable to the RRD, where farmers planted high-yielding varieties and increased the area dedicated to hybrids. Total production in the region increased by 500TMT, contributing to the country-wide increase in total Lua Mua rice over last year (see Table 2). In the south, harvest of the Lua Mua is underway. By the end of November, about 480THa had been harvested, accounting for about 45 percent of the total planted area. In the MRD, farmers have reportedly harvested 121THa of a total 557THa of Lua Mua rice. Despite losses from flooding in the Central Coast provinces, MARD expects that overall outturn of Lua Mua will be about 8,200TMT-8,300TMT, on increasing yields. Post assumes Lua Mua production will be the end lower end of that range (see Table 2).

**Table 2 : Vietnam 98/99 & 99/00 Lua Mua Rice Production**

	Areas (THa)		Yield (MT/Ha)		Prod. (TMT)	
	1998/99	99/00est.	1998/99	99/00est.	1998/99	99/00est.
Northern Viet Nam	1,253	1,271	3.76	3.98	4,715	5,062
North Mountain	514	523	3.59	3.40	1,844	1,778
RRD	528	529	4.40	5.11	2,322	2,703
North Central Coast	211	219	2.60	2.65	549	580
Southern Viet Nam	1,134	1,095	2.75	2.89	3,122	3,164
South Central Coast	196	192	2.70	2.70	530	518
Central Highland	124	130	2.50	2.80	310	364
North East Southern	217	219	2.48	2.88	539	631
MRD	597	554	2.92	2.98	1,743	1,651
<b>TOTAL VIETNAM</b>	<b>2,387</b>	<b>2,366</b>	<b>3.28</b>	<b>3.48</b>	<b>7,837</b>	<b>8,226</b>

Source: MARD; FAS/VN

**RRD & MRD are Vietnam's rice bowls, contributing more than 71 percent of total rice production.** In the RRD, farmers grow only two rice crops per year (W-S & Lua Mua), while a standard of three rice crops can be grown on the same land in MRD. In 1998/99, the MRD produced more than 16MMT of paddy, almost three times the level of paddy grown in the RRD (see Table 3 & 4). Farmers in the MRD are still able to both improve yields and expand area planted, whereas farmers in RRD can boost production only through yield improvement.

**Table 3: 1998/99 Paddy Production in MRD**

Provinces	Lua mua 98/99			W-S 98/99			S-A 99			Prod. TMT
	THa	MT/ha	TMT	THa	MT/ha	TMT	THa	MT/ha	TMT	
Long An	33	1.7	57	224	4.2	930	174	3.1	540	1,527
Tien Giang	4	2.8	10	96	5.2	492	186	4.2	782	1,284
Ben Tre	49	2.7	134	24	3.9	91	28	3.8	106	331
Dong Thap	0	0.0	0	202	5.6	1,139	240	3.9	937	2,077
Vinh Long	2	4.0	8	76	5.5	419	132	3.9	514	941
Tra Vinh	94	3.6	339	53	4.2	220	85	4.0	339	898
Can Tho	8	3.1	25	173	5.8	1,007	296	3.8	1,125	2,157
Soc trang	53	2.8	151	136	4.6	625	168	4.2	697	1,474
An Giang	20	1.8	36	217	5.9	1,272	240	4.2	996	2,304
Kien Giang	77	2.6	201	206	4.9	1,008	249	3.7	921	2,130
Bac Lieu	99	3.8	381	22	4.4	98	71	4.0	283	762
Ca Mau	158	2.5	400	24	4.4	103	62	4.0	248	751
<b>MRD TOTAL</b>	<b>598</b>	<b>2.8</b>	<b>1,743</b>	<b>1,452</b>	<b>5.1</b>	<b>7,402</b>	<b>1,931</b>	<b>3.9</b>	<b>7,489</b>	<b>16,635</b>

Source: MARD/FAS/VN

**Table 4: 1998/99 Paddy Production in the RRD**

Provinces	1999 W-S RICE			1999 LUA MUA RICE			1999 TOTAL RICE		
	Areas	Yield	Prod.	Areas	Yield	Prod.	Areas	Yield	Prod.
	(THa)	(MT/Ha)	(TMT)	(THa)	(MT/Ha)	(TMT)	(THa)	(MT/Ha)	(TMT)
Hanoi	25	3.8	93	28	4.5	126	53	4.1	219
Hai Phong	46	4.8	220	49	4.5	219	95	4.6	439
Ha Tay	82	5.1	418	85	4.9	418	167	5.0	836
Hai Duong	74	5.7	424	74	5.2	383	148	5.5	807
Hung Yen	42	5.7	243	47	5.1	239	89	5.4	482
Ha Nam	37	5.4	199	37	5.0	185	74	5.2	384
Nam Dinh	82	6.5	532	83	5.7	475	165	6.1	1,008
Ninh Binh	42	5.5	230	39	4.6	181	81	5.1	411
Thai Binh	85	6.2	529	87	5.5	476	171	5.9	1,006
<b>TOTAL</b>	<b>515</b>	<b>5.6</b>	<b>2,889</b>	<b>529</b>	<b>5.1</b>	<b>2,703</b>	<b>1,044</b>	<b>5.4</b>	<b>5,593</b>

Source: MARD/FAS/VN; note: all RRD rice is harvested in the calendar year.

**1999/00 Winter-Spring rice crop being planted in the South.** Farmers in southern VN have begun planting the next W-S rice crop. According to government data through November 25, 386THa had been sown, of which 378THa were in the MRD. Planting progress is slower compared with the same period last year due to the current high water level in key areas of the MRD. For the 1999/00 W-S rice crop, the MRD is projected to produce 8MMT of paddy from 1,500THa, with an implied average yield of 5.3MT/Ha (see Table 5)

**Table 5: Lua Mua 1999/00 and W-S plans in the MRD**

Province	Winter -Lua Mua 1999/00			W-S 1999/00 (planned)		
	Area	Yield	Production	Area	Yield	Production
	1,000Ha	MT/ha	1,000MT	1,000Ha	MT/ha	1,000 MT
Long An	26.0	NA	NA	232.0	4.30	997.6
Tien Giang	2.6	NA	NA	95.0	5.20	494.0
Ben Tre	48.5	NA	NA	24.0	4.50	108.0
Dong Thap	0.0	NA	NA	200.0	6.00	1,200.0
Vinh Long	2.0	NA	NA	76.0	6.00	456.0
Tra Vinh	85.0	NA	NA	57.0	4.90	279.3
Can Tho	6.0	NA	NA	175.0	6.00	1,050.0
Soc trang	70.3	NA	NA	140.0	5.00	700.0
An Giang	11.0	NA	NA	218.0	6.10	1,329.8
Kien Giang	44.8	NA	NA	225.0	5.10	1,147.5
Bac Lieu	100.0	NA	NA	30.0	4.50	135.0

Ca Mau	158.0	NA	NA	35.0	4.00	140.0
	554.3	2.90	1,607.5	1,507.0	5.33	8,037.2

Source: MARD.

**Vietnam records a bin-busting 30.5MMT of paddy for 1998/99.** Total rice production for 1998/99 is estimated at about 30.5MMT, the highest on record (see Table 6). Expanded growing areas, improvements in irrigation infrastructure in the MRD, and the use of high-yielding varieties (and hybrids in the north) contributed this success.

**Post recommends upward adjustment of 1998/99 paddy production to 30,470MT from previous estimate of 30,250MT.** The increase in late S-A paddy growing areas in MRD resulted in an uptick in total production for this crop by almost 200TMT. In large part based on this increase, FAS/HN recommends an adjustment for total 1998/99 paddy up to 30,470TMT (see table 7).

**Table 6: Vietnam: Rough Rice: Area, Yield and Production**

	1995/96	1996/97	1997/98		1998/99	
Harvested Area (MHa)			OLD	New	OLD	New
10thMonth(LuaMua)	2,602	2,558	2,542	2,542	2,387	2,387
Winter-Spring	2,521	2,682	2,744	2,717	2,888	2,888
Summer-Autumn	2,001	1,800	2,118	2,118	2,261	2,300
TOTAL	7,124	7,040	7,404	7,377	7,536	7,575
Yield (MT/Ha)						
10thMonth(LuaMua)	2.97	3.00	3.06	3.06	3.28	3.28
Winter-Spring	4.84	4.96	4.98	5.01	4.86	4.86
Summer-Autumn	3.43	3.50	3.49	3.56	3.71	3.74
TOTAL	3.76	3.82	3.89	3.92	4.01	4.02
Production (MMT)						
10thMonth(LuaMua)	7,728	7,674	7,779	7,779	7,829	7,829
Winter-Spring	12,202	13,303	13,665	13,612	14,036	14,036
Summer-Autumn	6,863	6,300	7,392	7,540	8,388	8,602
TOTAL	26,793	27,277	28,835	28,931	30,253	30,467

**Vietnam rice production for 1999/00 forecast at slightly lower than last year's record level** Rice industry observers peg total production for 1999/00 at about the 30MMT level. Expected dry conditions in the north and damaged irrigation systems in the flood-ravaged South Coast provinces will challenge efforts to surpass last year's record outturn (see PS&D table).

**Table 7 : Vietnam Rice PS&D (Revised)**

PSD Table						
Country	Vietnam			(1000 HA)	(1000 MT)	
Commodity	Rice, Milled					
		1988		1999	Forecast	2000



	Old	New	Old	New	Old	New
Market Year Begin		10/1997		10/1998		10/1999
Area Harvested	7404	7377	7536	7575	7450	7500
Beginning Stocks	0	0	0	0	0	0
Milled Production	19031	19094	19967	20108	19400	19800
Rough Production	28835	28931	30253	30467	29394	30000
MILLING RATE (.9999)	6600	6600	6600	6600	6600	6600
TOTAL Imports	0	0	0	0	0	0
Jan-Dec Imports	0	0	0	0	0	0
Jan-Dec Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	19031	19094	19967	20108	19400	19800
TOTAL Exports	3750	3750	4000	4350	3850	4000
Jan-Dec Exports	3750	3750	4000	4350	3850	4000
TOTAL Dom. Consumption	15281	15344	15967	15758	15550	15800
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	19031	19094	19967	20108	19400	19800

## RICE PRICES

**Slower recent export pace fails to dampen rice prices in the MRD.** Prices have soared dramatically in all MRD provinces since the GVN began granting soft loans to key rice exporters to stock rice. Recent quotes of paddy/raw rice prices (15%-16% moisture) in some MRD provinces are 1,700-1,800VND/kg and 2,450-2,500VND/kg, respectively; these are generally higher than Sep/Oct prices by about 250-300VND /kg. Table 8 updates the November prices of paddy and white rice raw material (25% Broken) in the MRD.

**Export prices have been firming through the end of November.** Export prices have been going up over the past ten days to December 2. Offer prices for 5%-broken and 25%-broken are at about US\$222-223/MT and US\$198-200/MT, respectively. At present, the export market is generally quiet and rice traders are slowing down mainly due to limited reliable sources of milled rice and the firming tone of domestic prices. Even though there is some buying interest in the market for small-quantity orders for Africa and Indonesia, only a few exporters are willing to offer rice to market. Offer prices are generally high and unworkable.

**Table 8 : November Prices of Paddy & Raw Material White Rice 25 % Broken in MRD**

Provinces	Paddy Price (VND/kg)	White Rice 25% Brkn. (VND/kg)
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Can Tho	1,650 - 1,750	2,430 - 2,500
An Giang	1,700 - 1,800	2,450 - 2,500
Tien Giang	1,700 - 1,800	2,450 - 2,550
Vinh Long	1,650 - 1,750	2,430 - 2,500
Dong Thap	1,650 - 1,800	2,480 - 2,530
Long An	1,700 - 1,800	2,450 - 2,500
Tra Vinh	1,700 - 1,800	2,450 - 2,530
Soc Trang	1,700 - 1,800	2,480 - 2,530
Kien Giang	1,700 - 1,800	2,450 - 2,530
Bac Lieu / Ca Mau	1,680 - 1,780	2,400 - 2,500
Ben Tre	1,750 - 1,850	2,500 - 2,600

Source : Trade

**Strong export performance in the first ten month**, floods in key central Vietnam provinces, and the reluctance of some major exporters and farmers to sell stocks are key factors in the current tight supply situation in the MRD. Some observers estimate the quantity of stocks held by exporters and large-scale farmers at roughly 250TMT-300TMT. Better post-harvest technology is beginning to appear on some of the larger farms in the MRD. More flexible financing has also encouraged farmers to hold stocks longer.

## TRADE

**Vietnam's export rocket falls to earth at 4.35MMT for campaign 1999.** Table 9 shows export details for October 1999. Shipments continued to taper off in October, as about 262TMT left for major destinations in Africa, Indonesia, Malaysia and Iran. Small orders for the EU were also filled this month. Shipments were mainly of small-quantity orders as traders minimized the risk of pricing fluctuations. Table 10 presents a revision of September 1999 export data to reflect 24TMT of 25%-broken rice shipped to Cuba from northern Hai Phong port at the end of the month.

**Vietnam's Jan-Oct export pace sizzles, and for Nov-Dec fizzles.** Exports in the first ten months of 1999 reached about 4.0MMT, or 710TMT over the same period in 1998. Shipments in November are estimated at about 215MT, primarily destined for Iraq (44TMT), Indonesia (28TMT), and African ports (95TMT). Speculation among rice traders is that export deliveries for December will be a very quiet 150TMT. Even though the export rocket has fizzled, VN will likely end campaign 1999 with a stellar 4.35 MMT, the latest in a succession of record export totals.

**Table 9: Vietnam: Rice Export in October 1999 (TMT)**

By seller	5%	10%	15%	25%	100% BR	Parboiled	Unknown	Total
Vinafood2	8.0	1.7	14.2		11.0			34.9
Dagrimex	10.6		7.2	8.0	2.0			27.8
Tigifood	1.5	7.0	6.4	5.2	5.8			25.8
Mekong CanTho	12.1		5.0	0.5	5.8			23.4
Angifood	15.5							15.5
VinhLong Food	8.9		6.3					15.2
Angimex			9.0	4.5				13.5

Unifood TG (JV)	13.0							13.0
Sohafarm		1.5	5.0	5.0				11.5
Kigitraco			8.2	3.0				11.2
Sofoodco	5.4	1.5		3.9				10.8
Foodcosa	8.9						0.2	9.1
Thanh Hoa Co.			6.0					6.0
Mihafood	4.6							4.6
Docimexco	1.2	2.5						3.7
Son Hoang	3.0							3.0
Imex Cuu Long	2.0		1.0					3.0
Codofarm	2.8							2.8
JFT	1.4					1.3		2.7
Gentraco	2.5							2.5
Unimex LA	1.9							1.9
Afiex	1.8							1.8
LongAn Food							1.1	1.1
Vinarice							0.5	0.5
Unknown	5.5						10.9	16.4
Subtotal	110.5	14.2	68.5	30.1	24.6	1.3	12.8	261.8
By destination								
Africa			34.0	4.5	10.5			49.0
Indonesia	18.0	4.0	2.2	20.4				44.5
West Africa	4.0		10.5		13.6			28.1
Tanzania	11.1		13.8					24.9
Yemen	19.2					1.3		20.5
Malay	15.5	1.7	0.4		0.5			18.1
Angola	15.5							15.5
Iran	15.5							15.5
Poland		4.0	1.4	4.7				10.1
EU	1.4		5.0					6.4
Latvia		3.0	0.5	0.5				3.9
Russia	0.3	1.5	0.6			0.2	1.2	3.8
Singapore	3.6							3.6
Ukraine	0.8							0.8
Japan							0.4	0.4
Unknown	5.5						10.9	16.4
Subtotal	110.5	14.2	68.5	30.1	24.6	1.5	12.5	261.8

Source: Trade

Table 10: Vietnam Rice Exports in the first 10 months of 1999

BY DESTINATION (TMT)											
DESTINATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	TOTAL
AFRICA	8	20	9	73	45	74	69	28	29	49	404
ALGERIA	0	0	0	9	0	7	0	7	0	0	23

ANGOLA	0	0	0	0	0	0	3	8	0	16	27
BANGLADESH	0	0	0	18	5	0	0	0	0	0	23
CUBA	13	0	0	13	68	35	22	0	44	0	195
EU	0	0	19	0	0	0	14	0	0	6	40
GABON	0	0	5	0	0	0	0	0	0	0	5
GHANA	0	0	13	0	0	7	0	5	4	0	29
HONGKONG	0	0	0	4	0	5	10	8	7	0	34
INDONESIA	9	0	6	33	49	102	343	455	76	45	1,118
IRAN	0	0	0	30	0	0	40	24	2	16	111
IRAQ	44	33	83	73	55	27	10	26	15	0	367
JAPAN	0	5	0	0	0	0	0	0	0	0	5
LATVIA	0	0	0	0	0	0	0	0	14	4	18
MADAGASCAR	0	0	0	0	0	0	0	0	0	0	0
MALAYSIA	20	0	21	19	11	6	3	2	26	18	127
MAURITIUS	0	0	0	0	3	3	0	0	0	0	7
MOZAMBIQUE	0	0	0	0	0	0	0	12	0	0	12
NIGERIA	0	0	0	0	0	0	0	0	0	0	0
PAPUA N. GUINEA	0	0	0	0	3	4	3	0	0	0	10
PHILIPPINES	95	126	130	84	29	24	7	5	0	0	500
POLAND	0	5	0	0	0	0	6	15	4	10	40
RUSSIA	0	0	0	0	0	0	0	0	3	4	7
SINGAPORE	1	0	6	2	0	13	10	19	2	4	57
SLOVENIA	0	0	0	0	0	0	0	0	0	0	0
S. KOREA	0	0	0	0	0	0	0	0	10	0	10
SYRIA	0	0	13	0	0	0	0	0	0	0	13
TANZANIA	9	13	0	13	11	0	5	16	0	25	93
UAE	0	0	0	0	0	0	0	1	2	0	3
UKRAINE	1	0	1	1	8	6	1	4	1	1	24
USA	0	0	0	0	0	0	0	0	0	0	0
WEST AFRICA	6	33	76	52	113	61	0	0	45	28	414
YEMEN	7	7	3	0	8	0	0	5	3	21	54
UNKNOWN	2	18	16	9	26	34	19	0	42	16	181
TOTAL	215	259	401	432	434	410	567	642	329	262	3,950
BY GRADES (TMT)											
GRADES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	TOTAL
2% Broken	0	0	9	0	0	4	0	0	0	0	13
5% Broken	23	20	72	62	30	45	102	88	60	110	612
10% Broken	44	56	95	75	56	52	54	79	36	14	561
15% Broken	119	152	150	119	50	29	61	116	45	68	909
25% Broken	25	2	22	92	220	156	345	351	128	30	1,371
35% Broken	0	0	0	0	0	4	2	6	0	0	12
100% Broken	0	12	25	61	45	12	1	0	14	25	195
Parboiled	0	0	2	0	0	0	2	2	0	1	8

UNKNOWN	3	18	26	23	33	107	0	0	47	13	270
TOTAL	215	259	401	432	434	410	567	642	329	262	3,950

Source: Trade

## POLICY

**Rice export policy for 2000 not yet decided, but likely to be more flexible.** The National Assembly has not yet fully addressed the rice export target or export management guidelines for 2000. According to observers, the target for campaign 2000 should be about 4.2MMT, all of which will be announced at the start of the year. If true, this would be an improvement over policy of the past few years, as it would enable exporters to develop full-year marketing plans. The quota for 2000 is likely to be allocated among the provinces, with comparatively smaller amounts dedicated to the mammoth state trading enterprises. There is also reportedly debate about private sector participation in exports, whereby the privates would apply for quota directly from provincial authorities. Preferential banking loans for rice exporters is also a topic of discussion.