VIETNAM RICE MARKET

MAIN MOVEMENTS AND TREND

Mekong River Delta: 557 thousand ha of summer-fall rice is harvested, accounting for 35.8% of total planted areas

Week 27/07 - 02/08/2009

Fertilizer prices in the provinces moved in different directions

The prices of brown rice and milled rice are likely to decrease slightly

Slim reductions in rice export prices

Thailand is to put 764,000 tons of rice for auction on 8/06/2009

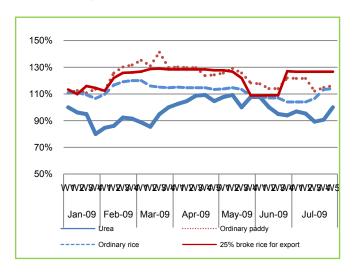
India imposes a full ban on rice export activities

Small drops are expected for world rice prices

Rise sharply Rise slightly Drop sharply Drop slightly

Get stable

Figure 1: Correlation between the prices of inputs and those of rice from 11/2008 to 7/2009 in Can Tho, 11/2008=100



Source: AGROINFO

I. DOMESTIC MARKET

Production

Till July 15, 2009, the Northern provinces planted 927.8 thousand ha of tenth-month rice, up 25.6 thousand ha over the same period in 2008; the Red River Delta region alone sowed 450.4 thousand ha, climbing by 16 thousand ha against the same period of the previous year. The Southern provinces harvested 578 thousand ha of summer-fall rice, up 8.1 thousand ha compared with the same period in 2008.

The harvested area of summer-fall rice in the Mekong River Delta region reached 557 thousand ha by the end of mid-July 2009, accounting for 35.8% of total planted areas. Average yield is expected to gain 4.8 ton/ha, total output is forecast at some 7.75 million tons of paddy rice.

With regard to pest infestation, in the Northern and Central provinces, brown planthoppers, white-back hoppers caused damage to summerfall rice and early tenth-month rice during the early grain-filling stage with a common density of 50 - 100 insects/m2, even as high as 1,500 -3,000 insects/m2 in some places. Total pestinfested area of the whole region was 6,785 ha, of which 670 ha was seriously damaged.

In the Mekong River Delta region, the area planted to summer-fall rice infested with brown planthoppers was dropped to nearly 5,000 ha, decreasing by 73,000 ha against mid-June 2009. The density of this pest was lowered to 750 –

3,000 insects/m2, down 2,000 insects/m2. Other diseases such as rice blast disease, rice leaf folder tended to mitigate in comparison with the previous months.

Input market

Retail price of Urea in the domestic market moved in different directions in the provinces this week. In Can Tho, the price rose unexpectedly from VND 5,900/kg observed last week to VND 6,500/kg this week (up 23%). In Dong Nai and Da Nang, Urea prices advanced somewhat to VND 6,050/kg (up 0.83%) and VND 6,200/kg (up 2.77%). In Hanoi, it dropped strongly to VND 6,200/kg from VND 7,000/kg recorded last week.

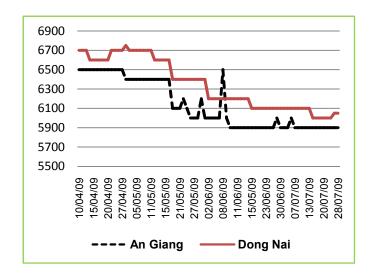
These fluctuations were attributed to different seasonal schedules of the provinces. Some in the Mekong River Delta region already entered the fall-winter crop, which caused Urea price in these provinces to go up slightly; meanwhile, Northern provinces basically finished the planting of tenth-month rice; demand for fertilizer was consequently at low levels.

Currently, the Cultivation Department (MARD) is collecting opinions for the resolution daft "Punishments for official violations in the manufacture of and trading in fertilizers". The highest fine for establishments which produce and trade in fake fertilizers may amount to VND 100 million. The draft also proposes the harshest sanction which is linked with criminal liability for fake fertilizer trades which are valued at VND 100 million or higher.

Domestic rice

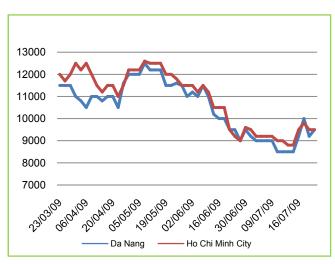
Over the past week, domestic rice prices varied moderately. The price of ordinary paddy

Figure 2: Urea prices in some provinces, VND/kg



Source: AGRODATA, AGROINFO

Figure 3: DAP price movements in some provinces, VND/kg



Source: AGRODATA, AGROINFO

remained unchanged at VND 4,500/kg in Dong Nai and climbed a little bit to VND 4,300/kg in Can Tho. Similarly, ordinary rice price still stood at VND 7,000/kg in An Giang and rose up to VND 8,550/kg.

Notably, this week, *the prices of brown rice and milled rice tended to mitigate in some provinces*. Specifically, in Dong Thap, the prices of brown rice, 5% broken milled rice and 25% broken milled rice, in turn, dropped to VND 5,500/kg, VND 6,850/kg and VND 5,700/kg.

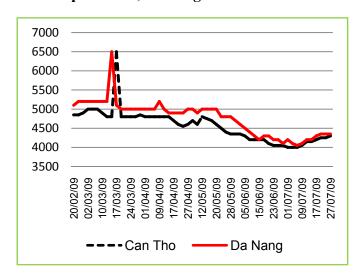
These reductions were driven from slightly depressed export-oriented demand for rice. Over the past week, Vietnam lost the export of 78,000 tons of rice to Philippine market to Thailand and Pakistan. Toepfer International – a global commercial corporation – gave the lowest valuation of US\$ 472.72/ton, C&F price for 10,000 tons of Pakistan rice. The second lowest valuation of US\$ 486.28/ton was offered by Thai Hua Corporation for the sale of 18,000 tons of rice. Asia Golden Rice offered the third lowest level of US\$ 487/ton, C&F price for 50,000 tons.

Rice for export

This week, the price of Vietnamese 5% broken rice slid to US\$ 413/ton from US\$ 418/ton recorded last week.

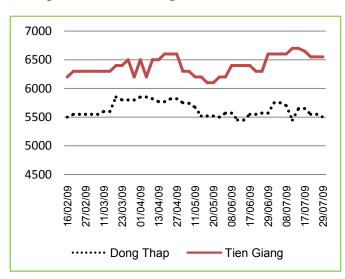
Rice export prices dropped slightly due to rising world supply. Recently, Thailand resumed export activities. Rice reserves of this country now stand at 6 million tons, and are expected to sell to the world market from now to the yearend. Pakistan, the world's third largest rice exporter, also plans to export 3.3 million tons of rice in 2009. Therefore, Vietnamese rice for

<u>Figure 4:</u> Price movements of ordinary paddy in some provinces, VND/kg



Source: AGRODATA, AGROINFO

<u>Figure 5:</u> Price movements of brown rice in some provinces, VND/kg



Source: AGRODATA, AGROINFO

export is facing a fierce competition which comes mainly from Thailand and Pakistan.

Meanwhile, the price of 25% broken rice for export increased moderately to US\$ 373/ton. This was resulted from the fact that the auction of 78,000 tons of rice in Manila pushed the price of Vietnamese 25% broken rice up, Vietnam's rice exporting enterprises hoped to win as Vietnamese rice prices are now some US\$ 100 – 150/ton lower than those of Thai rice.

MARD estimates that in July 2009, Vietnam exported roughly 640 thousand tons to earn US\$ 260 million, bringing the total volume of rice exported in the first 7 months to an estimated 4.37 million tons, turnover reaching US\$ 3.01 billion compared with the same period in 2008, up 49.16% in volume yet up only 6.02% in value.

According to statistics of the Vietnam Food Association, rice exports within the first 24 days of July 2009 gained 311,954 tons, worth US\$ 121.795 million FOB. <u>Accumulated exports from 1/01/2009 to 7/24/2009 reached 3.96 million tons, worth more than US\$ 1.62 billion.</u>

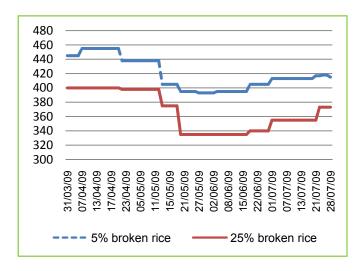
II. WORLD MARKET

Thailand

This week, Thailand won the bidding to export rice to the Philippines, particularly, Thai Hua Corporation would provide 18,000 tons of rice at the price of US\$ 486.28/ton and Asia Golden would provide 50,000 tons at US\$ 487/ton.

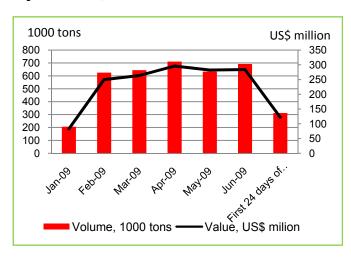
Thai Ministry of Commerce has just announced that the country was to put 764,000 tons of rice for auction on the morning of 8/06/2009. Of this

<u>Figure 6:</u> Price movements of Vietnamese rice for export, US\$/ton



Source: AGRODATA, AGROINFO

<u>Figure 7:</u> Vietnam's volume and turnover of exported rice, 2009



Source: VFA

figure, there is 300,000 tons of aromatic rice, the remainder is made up by 5% broken rice. Necessary conditions for the participation in the bidding are being approved.

Over the week, Thai 5% broken rice remained firm at US\$ 565/ton and 25% broken rice was sold for US\$ 480/ton.

India

During the week, Indian Minister of Agriculture Sharad Pawar suspended the announcement of India delaying the export of grain crops under a government-to-government agreement, banning the export of wheat and non-basmati rice in order to ensure food security, prevent the output of the farms from incurring losses due to this year's low rainfalls.

Pakistan

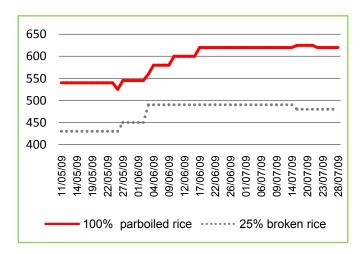
According to Mexican officials involved in the quarantine sector, the country agreed on lifting the ban on Irri rice imported from Pakistan. Mexico imposed a ban on Irri rice of Pakistan 5 years ago when its quarantine sector detected "khapra beetle" virus in Pakistan rice. Last month, Mexican quarantine inspectors came to Pakistan to check the quality and the manufacturing as well as processing process in this country, and came to a conclusion that Pakistan rice was qualified enough to be reimported. Mexico is expected to buy 10,000 – 15,000 tons of rice from Pakistan.

III. MARKET PROSPECTS

Domestic market

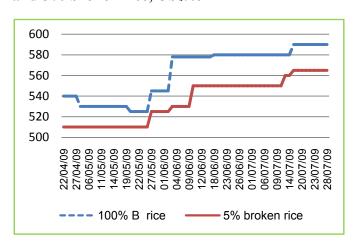
The volume of paddy harvested from the summer-fall crop drove the domestic rice supply up to ensure export demand. Meanwhile,

<u>Figure 8:</u> Prices of Thai 100% parboiled rice and 25% broken rice for export, US\$/ton



Source: AGRODATA, AGROINFO

Figure 9: Export prices of Thai 100% B rice and 5% broken rice, US\$/ton



Source: AGRODATA, AGROINFO

growing world rice demand will put pressure on Vietnam's domestic rice and export rice in the coming time.

World market

World demand for exported rice is expected to increase slightly. India has officially decided to stop exporting and it is very likely that the country will continue to ban rice exports till the end of 2009. However, presently, Thailand has huge rice inventories. Therefore, the country will continue to sell that amount, pushing world volume of exported rice up. Hence, world rice prices are expected to reduce somewhat in the coming time.

APPENDICES

MARKET DATA

Appendix 1

Date	The instructing body	Concerning	Content
			The Government will not limit rice exports in 2009
6/04/2009	Government	The regulation of production and consumption of rice in the Mekong River	Rice export targets will be adjusted in accordance with the situation of domestic rice production The Government will not allocate rice export quotas to the provinces
		Delta	A policy on buying rice for temporary reserves to prevent price decreases may be adopted Provinces need strictly limit the planting of low-quality
			paddy varieties.
	Government		The Ministry of Agriculture and Rural Development should coordinate with provinces in instructing an appropriate structure of rice varieties with attention paid to rice drying In the near future, rice import across the border will be
		The regulation of rice export	implemented in line with current regulations and agreements with other countries.
5/20/2009			Defining rice export as a business with certain conditions
			It is necessary to organize meetings to clearly define responsibilities of ministries, sectors, People's Committees of provinces, the Vietnam Food Association, and others in the regulation of rice export.
			The Ministry of Industry and Trade and Vietnam Food Association periodically report the situation of rice export to the Ministry of Information and Communications
4/29/2009	MARD	Dispatch No. 15 BNN/CD on supervising the direct-seeding of IR 50404 in the 2009 summer-fall crop	Maintain the area of IR50404 at a maximum 15-20% of total planted areas
5/04/2009	VFA		Allowing enterprises to sign new contracts or resume the transaction of rice export contracts.
2/23/2009	VFA	Suspending the signing of new contracts delivery time of which would fall in the first 6	To ensure food safety, it is necessary to extend the delivery time as signed rice volume within early months has exceeded the target.

		months of 2009		
6/15/2009	Government	176/TB-VPCP strengthening ti	lo. on he	8

Appendix 2:

Time	Volume (ton)	Turnover (US\$)
April 2009	710670	296022213
First 8 days of May 2009	119375	50406786
First 15 days of May 2009	280827	117623438
First 22 days of May 2009	473850	198819946
First 12 days of June 2009	328000	137000000
First 19 days of June 2009	417433	174203976
First 26 days of June 2009	503716	210025984
June 2009	691847	283988445
First 17 days of July 2009	210425	83790000
First 24 days of July 2009	311954	121795000

Source: VFA

Appendix 3:

Accumulated rice exports from 1/01/09 to	Volume (ton)	Turnover (US\$)
4/17/2009	1979868	802097739
4/24/2009	2201560	895447174
4/30/2009	2295793	935087308
5/08/2009	2415018	985738595
5/15/2009	2576435	1052941735
5/22/2009	2769066	1133969194
6/05/2009	3100000	1270000000
6/12/2009	3200000	1354585268
6/19/2009	3375774	1391850965

6/26/2009	3462297	1427971654
6/30/2009	3650438	1501759371
7/17/2009	3860767	1585597135
7/24/2009	3962146	1623000000

Source: VFA

1. Prices for some Thai rice varieties, US\$/ton

Rice variety	7/28/2009	Week 31 (7/27- 8/02/2009)	Compared to last week	Compared to last month	Compared to last quarter	Compared to last year
100%B	590	590	0	2.43	6.69	-12.07
100%	620	620	-0.32	3.16	9.54	-11.68
parboiled						
15% brokens	530	530	0	0.76	7.51	-15.61
10% brokens	550	550	0	3	7.63	-14.33
5% brokens	565	565	0	4.05	7.41	-12.81
25% brokens	480	480	0	-1.23	5.73	-19.87

Source: AGRODATA, AGROINFO, IPSARD, www.agro.gov.vn

2. Prices for some Vietnamese rice varieties, US\$/ton

Rice variety	7/28/2009	Week 31 (7/27- 8/02/2009)	Compared to last week	Compared to last month	Compared to last quarter	Compared to last year
5%	413	413	-0.86	3.51	-1.43	-30.12
brokens						
25%	373	373	0.97	9.71	1.63	-30.8
brokens						

Source: AGRODATA, AGROINFO, IPSARD, www.agro.gov.vn

3. Ordinary rice prices in some markets, VND/kg

Market	Date	Price	Week 31 (7/27- 8/02/2009)	Compared to last week	Compared to last month	Compared to last quarter	Compared to last year
An Giang	7/27/2009	7000	7000	0	-2.78	-1.62	6.3

Can Tho	7/29/2009	8600	8550	0.59	7.86	3.09	1.41
Da Nang	7/29/2009	9000	9000	0	8.67	3.1	-2.91
Hanoi	7/29/2009	8500	8500	0	1.63	-4.94	-9.78
HCMC	7/29/2009	9500	9500	4.4	12.73	6.93	-1.41

4. Urea fertilizer prices in some markets, VND/kg

Market	Date	Price	Week 31 (7/27- 8/02/2009)	Compared to last week	Compared to last month	Compared to last quarter	Compared to last year
An Giang	7/28/2009	5900	5900	0	-0.51	-5.04	-17.31
Can Tho	7/28/2009	6500	6500	10.17	2.59	-3.39	9.24
Da Nang	7/28/2009	6200	6200	2.76	-2.15	-7.81	4.2
Dong Nai	7/28/2009	6050	6050	0.83	-1.74	-5.97	-26.76
Hanoi	7/28/2009	6200	6200	1.64	-9.06	-10.26	-0.16
HCMC	7/28/2009	6000	6000	-0.55	-7.44	-15.04	-4.31
Tra Vinh	7/28/2009	6800	6800	0	0	0	-14.12

Source: AGRODATA, AGROINFO, IPSARD, www.agro.gov.vn

5. DAP fertilizer prices in some markets, VND/kg

Market	Date	Price	Week 31 (7/27- 8/02/2009)	Compared to last week	Compared to last month	Compared to last quarter	Compared to last year
An Giang	7/28/2009	7800	7800	0	0	-2.23	-49.83
Can Tho	7/28/2009	9200	9200	-0.36	-8.17	-15.4	-21.9
Da Nang	7/28/2009	9500	9500	-0.7	-7.03	-13.83	-21.12
Dong Nai	7/28/2009	7600	7600	0	-3.49	-8.57	-56.94
Hanoi	7/28/2009	9000	9000	-1.82	-17.5	-21.07	-28.63
HCMC	7/28/2009	9500	9500	-1.04	-8.5	-16.62	-23.33
Tra Vinh	7/28/2009	13000	13000	0	0	1.56	-32.76

6. Weekly price for ordinary rice in some markets, VND/kg

Week	An Giang	Ha Noi	Kien Giang	HCMC
19(5/04-5/10/2009)	-	9500	-	9300
20(5/11-5/17/2009)	7000	9000	-	9200
21(5/18-5/24/2009)	7000	9000	-	9000
22(5/25-5/31/2009)	7000	9000	-	8800
23 (6/01-6/07/2009)	7000	8500	6200	8500
24 (6/08-6/14/2009)	7400	8500	-	8000
25 (6/15-6/21/2009)	7500	8000	6000	8500
26(6/22-6/28/2009)	7000	8000	6000	8000
27(6/296-7/05/2009)	7000	8000	5800	8500
28(7/06-7/12/2009)	7000	8000	6000	-
29(7/13-7/19/2009)	7000	8250	6000	8500
30(7/20-7/26/2009)	7000	8500	-	9100
31(7/27-8/02/2009)	7000	8500	-	9500

7. Weekly price for Nang Huong rice in some markets, VND/kg

Week	An Giang	Ben Tre	Kien Giang
19(5/04-5/10/2009)	-	-	-
20(5/11-5/17/2009)	13500	14000	-
21(5/18-5/24/2009)	13500	14000	-
22(5/25-5/31/2009)	13500	14000	-
23 (6/01-6/07/2009)	13500	13500	16500
24 (6/08-6/14/2009)	13500	13500	16500
25 (6/15-6/21/2009)	13500	13000	16500
26(6/22-6/28/2009)	13500	13000	16500
27(6/296-7/05/2009)	13500	-	-
28(7/06-7/12/2009)	13500	-	16500
29(7/13-7/19/2009)	-	13000	16500
30(7/20-7/26/2009)	13500	13000	-
31(7/27-8/02/2009)	13500	13000	-

8. Weekly price for brown rice in some markets, VND/kg

Week	An Giang	Ben Tre	Dong Thap	Kien Giang
19(5/04-5/10/2009)	-	-		-
20(5/11-5/17/2009)	5720	7250	5595	-
21(5/18-5/24/2009)	5550	7250	5520	-
22(5/25-5/31/2009)	5530	7350	5500	-
23 (6/01-6/07/2009)	5520	7350	5570	5900
24 (6/08-6/14/2009)	5550	7350	5570	5900
25 (6/15-6/21/2009)	5560	7150	5450	5500
26(6/22-6/28/2009)	5580	7100	5570	6600
27(6/296-7/05/2009)	5600	-	5750	5500
28(7/06-7/12/2009)	5630		5750	5500
29(7/13-7/19/2009)	5650	7150	5650	5500
30(7/20-7/26/2009)	5650	7150	-	-
31(7/27-8/02/2009)	5650	7150	5500	-

9. Weekly price for ordinary paddy in some markets, VND/kg

Week	Ben Tre (wholesale)	Can Tho (retail)	Dong Nai (whole sale)	Thai Binh (retail)
19(5/04-5/10/2009)	-	4700	4500	-
20(5/11-5/17/2009)	5200	4775	4500	4000
21(5/18-5/24/2009)	5200	4650	4500	4000
22(5/25-5/31/2009)	5200	4400	4500	4000
23 (6/01-6/07/2009)	-	4300	4500	4000
24 (6/08-6/14/2009)	-	4200	4300	4000
25 (6/15-6/21/2009)	5200	4200	4300	3800
26(6/22-6/28/2009)	5200	4050	4500	-
27(6/296-7/05/2009)	-	4025	4500	-
28(7/06-7/12/2009)	-	4000	4500	-
29(7/13-7/19/2009)	5200	4150	4500	-

30(7/20-7/26/2009)	-	4250	4500	-
31(7/27-8/02/2009)	5200	4300	4500	

10. Weekly price for Urea fertilizer in some markets, VND/kg

Week	An Giang	Ben Tre	Dong Nai
19(5/04-5/10/2009)	6400	-	6700
20(5/11-5/17/2009)	6400	6500	6600
21(5/18-5/24/2009)	6400	6500	6500
22(5/25-5/31/2009)	6200	6500	6400
23 (6/01-6/07/2009)	6200	-	6200
24 (6/08-6/14/2009)	6500	-	6200
25 (6/15-6/21/2009)	5900	6200	6200
26(6/22-6/28/2009)	5900	6200	6100
27(6/296-7/05/2009)	5900	-	6100
28(7/06-7/12/2009)	5900	-	6100
29(7/13-7/19/2009)	5900	6200	6000
30(7/20-7/26/2009)	5900	6200	6000
31(7/27-8/02/2009)	5900	6200	6050

Source: AGRODATA, AGROINFO, IPSARD, www.agro.gov.vn

11. Weekly price for DAP fertilizer in some markets, VND/kg

Week	An Giang	Ben Tre	Dong Nai	Tien Giang
19(5/04-5/10/2009)	8000	-	8700	7800
20(5/11-5/17/2009)	8000	12500	8650	7700
21(5/18-5/24/2009)	7925	12500	8650	7700
22(5/25-5/31/2009)	7833	12500	-	7325
23 (6/01-6/07/2009)	7800	-	8150	7300
24 (6/08-6/14/2009)	7800	-	7800	7300
25 (6/15-6/21/2009)	7800	11000	7850	7300
26(6/22-6/28/2009)	7800	11000	7800	7300
27(6/296-7/05/2009)	7800	-	7800	-

28(7/06-7/12/2009)	7800	-	7700	-
29(7/13-7/19/2009)	7800	10000	7700	-
30(7/20-7/26/2009)	7800	10000	7600	6700
31(7/27-8/02/2009)	7800	10000	7600	6700

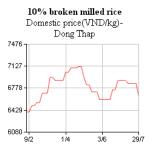
12. Weekly prices for Vietnamese 5% and 25% broken rice varieties, and Thai 5% and 25% broken rice varieties, US\$/ton

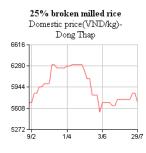
Week	Vietnamese 5% brokens	Vietnamese 25% brokens	Thai 5% brokens	Thai 25% brokens
19(5/04-5/10/2009)	438	398	510	430
20(5/11-5/17/2009)	427	390	510	430
21(5/18-5/24/2009)	401.67	361.67	510	430
22(5/25-5/31/2009)	394.33	335	515	436.67
23 (6/01-6/07/2009)	394	335	528	474
24 (6/08-6/14/2009)	395	335	536	490
25 (6/15-6/21/2009)	395	335	550	490
26(6/22-6/28/2009)	405	340	550	490
27(6/296-7/05/2009)	405	340	550	490
28(7/06-7/12/2009)	413	355	550	490
29(7/13-7/19/2009)	413	355	560	490
30(7/20-7/26/2009)	417	355	565	480
31(7/27-8/02/2009)	413	373	565	480

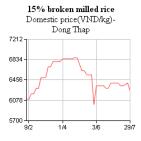
DOMESTIC MARKET

Food prices









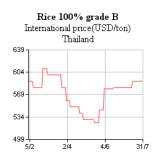
Input prices

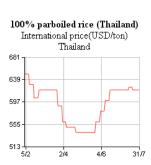




INTERNATIONAL MARKETS

Food prices





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LIST OF MARKET ANALYSIS PUBLICATIONS IN 2008 AND FIRST QUARTER IN 2009









List of publications				
	Released date	Pages	Vietnames	English
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