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Rice Outlook

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U.S. 2018/19 Plantings Indicated at 2.69 Million Acres

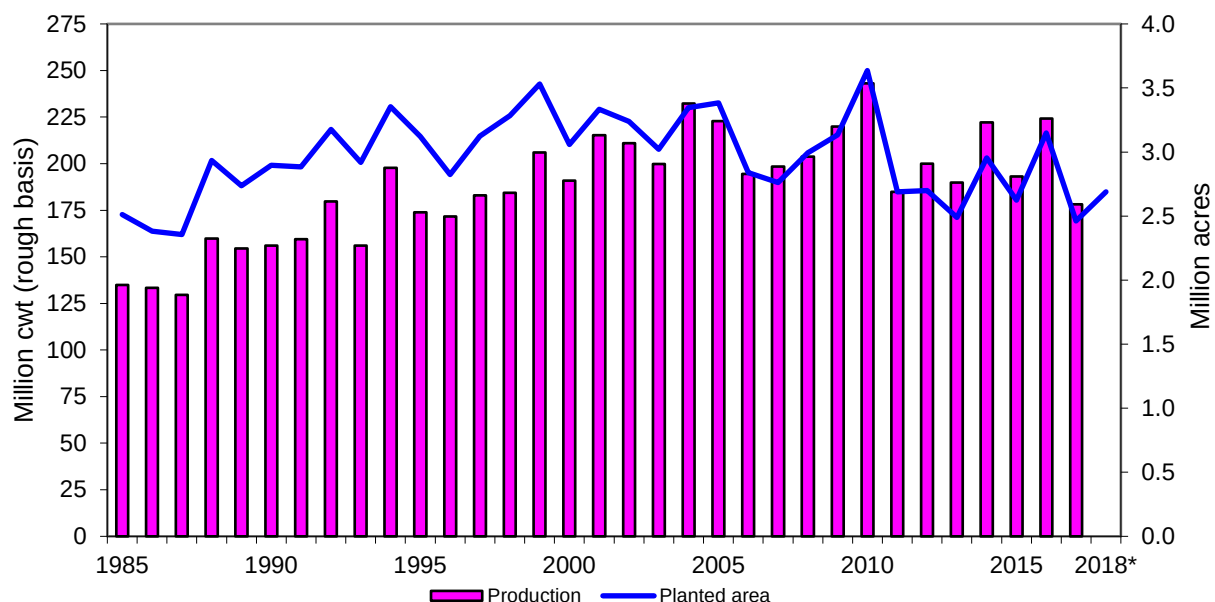
In the NASS *Prospective Plantings* report issued March 29 March, U.S. rice growers indicated 2018/19 rice plantings at 2.69 million acres, up 9 percent from a year earlier, with long-grain accounting for the majority of the increase. In the 2017/18 balance sheet, total rice supply was raised 0.1 million cwt this month on increased imports. On the use side, long-grain domestic and residual use was reduced 1.0 million cwt to 92.0 million cwt, while medium- and short-grain was increased by an equivalent amount to 28.0 million cwt. The lower projected use for long-grain and reduced exports increased the long-grain 2017/18 ending stocks forecast to 19.4 million cwt. The all-rice season average farm price (SAFP) was raised \$0.10 per cwt at the midpoint to \$12.60 due to higher projected medium- and short-grain prices. Global rice production for 2017/18 was raised to a new record of 487.46 million metric tons (mt). We include a commodity focus on the California drought and continued decrease in California acreage this month.

Domestic Outlook

Rice Growers Indicate 2018/19 Plantings Up 9 Percent

In the NASS *Prospective Plantings* report, U.S. rice growers indicated 2018/19 total plantings at 2.69 million acres, up almost 9 percent from a year earlier. The increase can mostly be attributed to increases in U.S. long-grain acreage due to higher prices and significantly lower long-grain carry out expected from 2017/18.

Figure 1. U.S. rice intended plantings up 9 percent in 2018



* 2018 is Intended Plantings based on surveys conducted during the first 2 weeks of March. Sources: 1985-2014, *Rice Yearbook Data Set*, Economic Research Service, USDA; 2015/16-2017/18, *World Agricultural Supply and Demand Estimates*, World Agricultural Outlook Board, USDA; Intended Plantings, USDA National Agricultural Statistics Service, *Prospective Plantings*.

At 2.03 million acres, intended U.S. long-grain plantings are 12 percent above a year earlier. Almost all long-grain is grown in the South, and only California growers intend to decrease long-grain acreage, from 7,000 acres to 5,000 acres. In Arkansas, the largest rice growing State, growers intend to plant 1.15 million acres in 2018/19, up 16 percent from 2017/18 plantings. Growers in Louisiana indicated 2018/19 long-grain rice plantings at 380,000 acres, up 3 percent from 2017/18. Mississippi and Texas growers indicated long-grain planted areas of 120,000 and 165,000 acres, increases of 4 and 1 percent compared to the previous year, respectively. Growers in Missouri indicated the highest State percentage increase in rice plantings; at 210,000 acres, intended long-grain rice planting in the State is 31 percent above 2017/18 plantings.

In contrast to increased long-grain acreage, total U.S. medium-grain intentions for 2018/19 are 609,000 acres, a 1 percent decrease compared to the previous year. The small decrease includes

intentions to decrease acreage by California and Texas, increase acreage in Arkansas, and retain 2017/18 acreage in Louisiana and Missouri. Growers in California indicated all 2018/19 rice plantings at 440,000 acres, 1 percent below a year earlier. At 385,000 acres, California medium-grain intended plantings are 4 percent below 2017/18 plantings, the lowest since 2015/16. This is partially offset by an increase in short-grain plantings in California, intended at 50,000 acres or 32 percent higher than in 2017/18. California received heavy rainfalls in March and a “Pineapple Express,” an atmospheric channel originating in Hawaii that moves large amounts of moisture, is expected to bring notable April showers. Despite increased precipitation, the California Sierra Nevada snowpack is still below the historical average. See the section **“Commodity Focus: California rice area remains below pre-drought levels”** starting on page 11, which provides a more detailed review of the California drought and decreased California planted acreage.

Progress of 2018/19 U.S. Rice Crop Below Last Year

For the week ending April 8, planting of the 2018/19 U.S. rice crop was estimated to be 21 percent complete, 8 percentage points below a year ago but only 1 percentage point below the 2013-2017 average. Crop progress was most advanced in Louisiana and Texas, with prolonged dry conditions allowing growers to make progress. In Louisiana, 76 percent of the 2018/19 crop was reported planted by April 8, up 2 percentage points from last year and 12 percentage points from the 5-year average. In Texas, 65 percent of the 2018/19 crop was reported planted by April 8, up 14 percentage points from a year earlier, and 11 percentage points from the 5-year average. Despite the progress in these two States, the crop in other areas is not as advanced. Missouri, along with Arkansas, had delayed planting based on rainfall. As of April 8, Arkansas is 10 percent complete, 6 percent below the 5-year average but 15 percent above last year. Missouri had not begun planting, in contrast to a crop progress of 14 percent this time last year and a 5-year average of 6 percent. Mississippi is 8 percent complete, 13 percentage points below last year and 6 percentage points below the 5-year average. Mississippi received rainfall that stalled rice planting. California had not yet begun planting as of April 8, in line with last year, but 1 percentage point below the 5-year average.

For areas that have been planted, emergence was mostly ahead of the 5-year average. For the week ending April 8, 11 percent of the U.S. 2018/19 rice crop had emerged, behind 12 percent a year ago but ahead of the U.S. 5-year average of 8 percent. On the Gulf Coast, 50 percent of Louisiana's 2018/19 crop had emerged by April 8, behind 51 percent a year ago though ahead the U.S. 5-year average of 35 percent. The Texas 2018/19 rice crop was reported 44 percent emerged by April 8, ahead of 31 percent a year ago and the 5-year average of 26 percent. Crop

development was less advanced in the Delta. In Arkansas, only 1 percent of the crop had emerged by April 8, 4 percentage points below last year, and 1 percentage point below the 5-year average. Mississippi's 2018/19 rice crop was reported 4 percent emerged by April 8, a progress equal to that of the previous year, and 2 percentage points above the 5-year average.

U.S. 2017/18 Export Forecast Decreased 4.0 Million Cwt to 96.0 Million Cwt

In the 2017/18 balance sheet, the forecast for U.S. total rice exports is decreased to 96.0 million cwt, down 4.0 million cwt this month compared to the March forecast. The decrease is divided evenly between long-grain and medium- and short-grain. Long-grain exports are now projected at 69.0 million cwt, down 9.7 million cwt from the previous year. Medium-grain exports are now projected at 27.0 million cwt, 10.9 million cwt below the previous year. As a result of the reduced exports, the estimate for 2017/18 all rice ending stocks is raised 4.1 million cwt to 33.3 million. These ending stock levels still remain below the 5-year average.

Rough rice exports are lowered by 3.0 million cwt to 31.0 million cwt, reflecting a slow pace to date as well as increased competition in core Western Hemisphere export markets. The bulk of rice exported to the Western Hemisphere, the largest market for U.S. long-grain rice, is shipped in rough rice form, with Mexico being the largest buyer. While the United States continues to have the largest share of Mexico's market, there has been increased market penetration by Guyana and Uruguay. U.S. rough-rice sales to Venezuela have also been below last year, as the government has begun to purchase from other Western Hemisphere exporters such as Mexico and Brazil.

Milled rice exports are also lowered by 1.0 million cwt to 65.0 million cwt, on increased competition in core markets and slow pace of trade. Milled rice exports, which include milled and brown rice exports on a rough-rice basis, are about 12 percent below the previous year. Haiti, Japan, Canada, South Korea, Taiwan, Saudi Arabia, Jordan and Iraq are the top markets for U.S. milled rice.

March 1 Rice Stocks 22 Percent Below Last Year

The only total rice supply-side revision this month was a 0.1 million cwt increase in 2017/18 U.S. rice imports to 25.0 million cwt, a 7-percent increase from the previous year. By class, long-grain supplies remain projected at 180.4 million cwt, 14 percent lower than a year earlier. Total supplies of medium- and short-grain are forecast at 65.4 million cwt, 0.1 million cwt above the previous

month forecast, and 19 percent below a year earlier, the result of a smaller crop and significantly lower beginning stocks.

Based on data from the March 29 NASS *Rice Stocks*, U.S. March 1, 2018 stocks of all rice (combined rough- and milled- stocks on a rough basis) are estimated at 91.181 million cwt, down 22 percent from a year earlier. Despite the decline, reported March stock levels were still larger than expected as U.S. exports have weakened. The March 1 long-grain stocks are estimated at 60.316 million cwt, down 20 percent from a year earlier, mostly due to decreased production.

Similarly, U.S. stocks of medium- and short-grain rice on March 1 are estimated at 27.488 million cwt, a drop of 27 percent over the previous year, with the bulk of the decline in California. Medium-grain stocks in California are decreased 30 percent, and Southern medium-grain stocks are decreased 18 percent relative to the previous year.

Season-Average Farm Prices Raised for Medium-Grain

The all-rice season-average farm price (SAFP) is raised \$0.10 per cwt at the midpoint to a range of \$12.40 to \$12.80, entirely due to higher projected medium- and short-grain prices. The all medium- and short-grain SAFP was increased to a range of \$14.90 to \$15.50, up from the 2016/17 SAFP of \$13.10. The California medium- and short-grain SAFP was increased to a range of \$16.10 to \$16.90, up from the 2016/17 SAFP of \$14.10. The Southern medium-grain SAFP was raised to \$11.90 to \$12.30, up from the 2016/17 SAFP of \$10.10. The U.S. long-grain 2017/18 SAFP is projected at \$11.50 to \$11.90 with the midpoint unchanged this month, but up from \$9.61 for 2016/17.

International Outlook

Global Production for 2017/18 Reaches New Record

The projection for global 2017/18 rice production is raised 1.2 million metric tons (mt) (milled basis) to a new record of 487.46 million mt, up 0.2 percent from the record set last year. Brazil, Burma, Pakistan, and the Philippines are expected to have increases of 0.3 million mt each. There were no significant reductions in production estimates from last month.

Global rice trade in calendar year 2018 is projected to be at a record high at 48.14 million mt. Global rice exports are raised 0.8 million mt relative to the March forecast with a 0.3-million-ton increase for Thailand and 0.2- million-ton increases each for Burma, India, and Pakistan.

Table A - Rice imports at a glance for 2018 (1,000 MT), April 2018				
Country or region	Trade	Month-to-month forecast change	Year-to-year forecast change	Comments on month-to-month forecast changes
Angola	525	-125 ↓	75 ↑	Decrease based on near final data
Azerbaijan	70	-30 ↓	10 ↑	Decreased anticipated year-to-year increase
Bangladesh	1,800	200 ↑	-524 ↓	Increased to reflect strong buying
Benin	550	50 ↑	25 ↑	Increased on larger white rice purchases
Congo	170	30 ↑	10 ↑	Increased on higher trend
Ghana	700	100 ↑	50 ↑	Increased on higher trend
Indonesia	1,300	500 ↑	1,000 ↑	Increased on recent BULOG buying
Jordan	220	10 ↑	0 →	Increased on final data
Mexico	860	10 ↑	-10 ↓	Increased on new tenders
New Zealand	50	5 ↑	3 ↑	Increased on final data
Peru	300	30 ↑	-40 ↓	
Philippines	1,400	100 ↑	200 ↑	Increased on recent NFA buying
Saudi Arabia	1,300	-150 ↓	0 →	
Somalia	460	20 ↑	10 ↑	Increased on expected growth
South Africa	1,000	50 ↑	-54 ↓	Increased on expected continued growth
Switzerland	130	-10 ↓	11 ↑	Decreased on trend
Syria	140	10 ↑	-10 ↓	Increased on trend
Tanzania	260	20 ↑	20 ↑	
Togo	320	20 ↑	30 ↑	Increased white rice imports from Togo
Turkmenistan	35	-10 ↓	5 ↑	Decreased on trend
Ukraine	80	30 ↑	3 ↑	Increased on trend
Uzbekistan	5	-15 ↓	0 →	Decreased on trend

Source: U.S. Dept. of Agriculture, Foreign Agricultural Service, Production, Supply and Distribution Database.

Global rice imports are raised 0.94 million mt relative to the March estimate, to 47.55 million mt. Indonesia imports were raised 0.5 million and Bangladesh imports were raised 0.3 million mt. Larger imports are also expected for Ghana, Indonesia, and the Philippines.

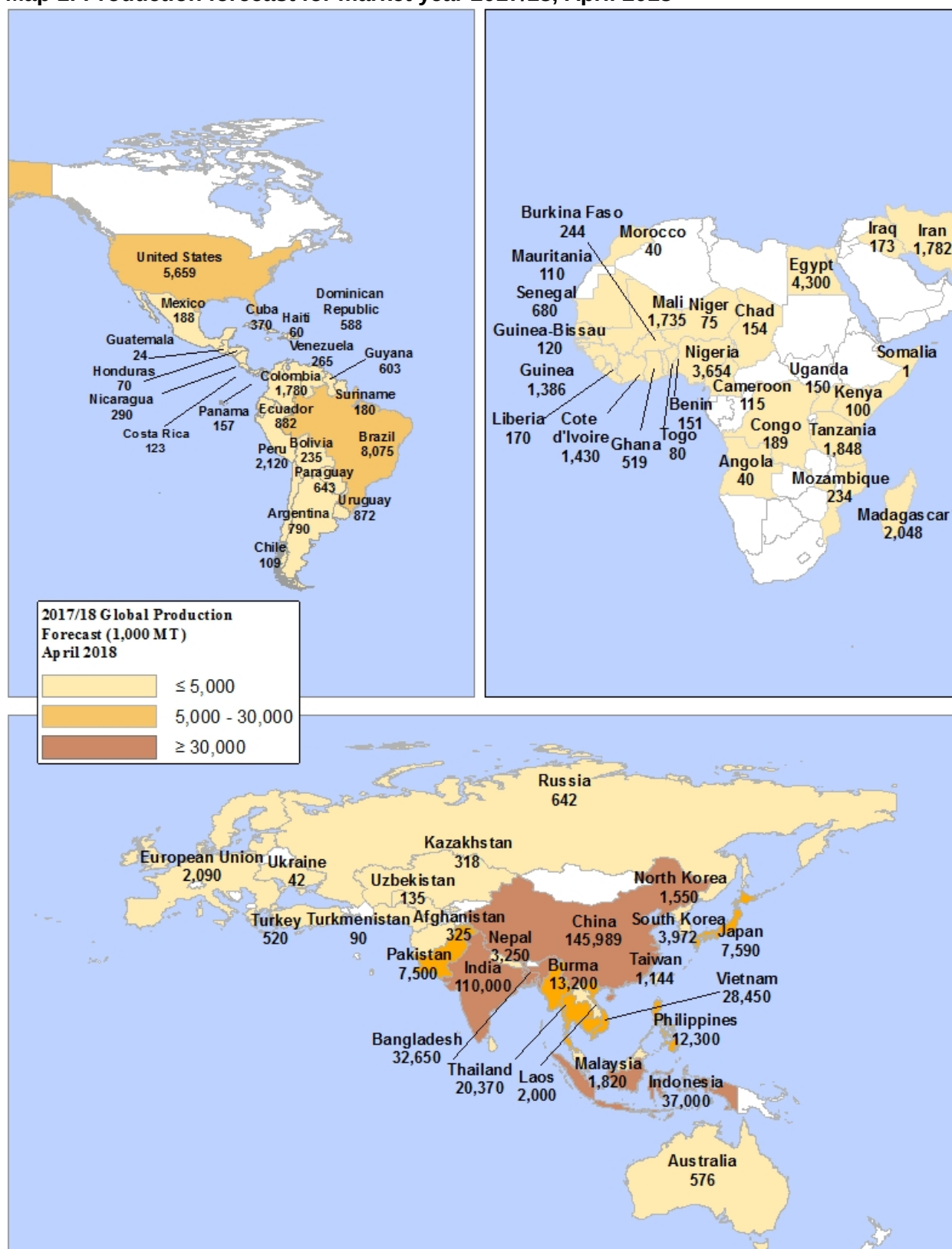
Table B - Rice exports at a glance for 2018 (1,000 MT), April 2018				
Country or region	Trade	Month-to-month forecast change	Year-to-year forecast change	Comments on month-to-month forecast changes
Brazil	750	100	156	Increased on strong exports, including sales to Venezuela
Burma	3,500	200	150	Increased on strong exports, new record
Dominican Republic	12	2	2	Increased on final data
Egypt	50	-50	-50	Decreased on import ban and ample stocks
India	13,200	200	640	Increased on continued strong trade with Bangladesh, new record
Japan	50	-10	0	
Pakistan	4,000	200	400	Increased on competitive prices and export target
Taiwan	50	-20	30	Decreased on fewer than expected food aid
Thailand	10,500	300	-1,115	Increased on strong first quarter trade
Turkey	55	5	-1	Increased on trend
United States	3,150	-150	-234	

Source: U.S. Dept. of Agriculture, Foreign Agricultural Service, Production, Supply and Distribution Database.

Global domestic use is reduced fractionally to 480.15 million mt from 480.49 million mt. The large global supply combined with declining consumption, has led to increased 2017/18 world ending stocks. The projection for global ending stocks is revised upward by 1.4 million mt to 144.4 million; if realized, these will be the second-highest stocks on record.

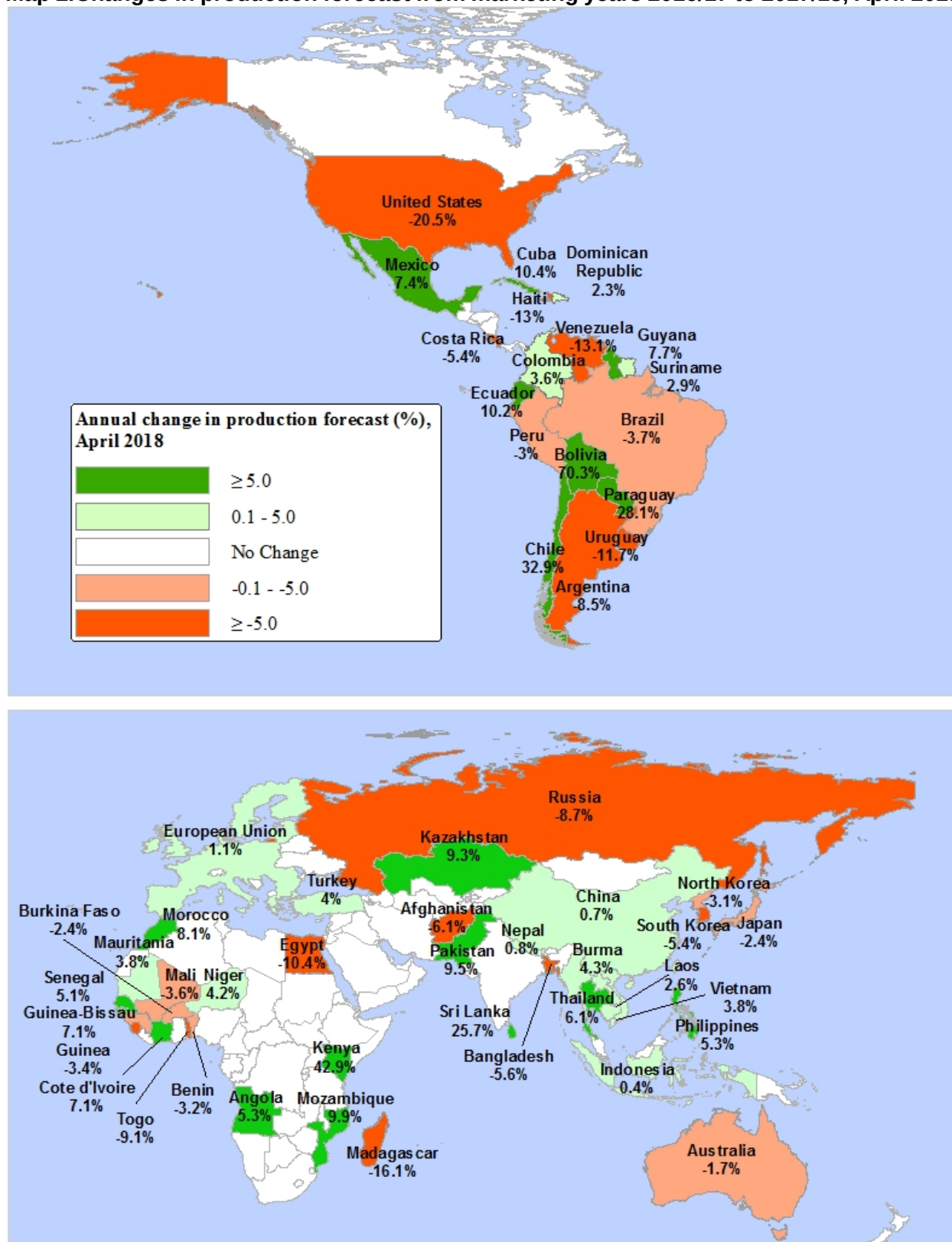
Thailand rice export quotes increased by 2 to 4 percent due to strong demand from African countries for low-grade white rice. For the week ending April 2, Thailand's 100-percent grade B milled white rice was quoted at \$440 per ton, up \$15 from the week ending March 26, and up \$21 for the week ending March 5. Prices for Thailand's lower quality 15-percent broken were quoted at \$420 per ton for the week ending April 2, up \$15 and \$39 compared to the weeks ending March 26 and March 5, respectively. Prices for Thailand's premium Jasmine rice, an aromatic variety, were quoted at \$1,095 per ton in the week ending April 2, up \$15 from the week ending March 26, but down \$13 from the week ending March 5. All price quotes for Thailand's rice are from the *Weekly Rice Price Update* reported by the U.S. Agricultural Office in Bangkok.

Map 1: Production forecast for market year 2017/18, April 2018



Source: U.S. Dept. of Agriculture, Foreign Agricultural Service, Production, Supply and Distribution Database.

Map 2.Changes in production forecast from marketing years 2016/17 to 2017/18, April 2018



Source: U.S. Dept. of Agriculture, Foreign Agricultural Service, Production, Supply and Distribution Database.

Price quotes for Vietnam's rice decreased 1 percent in March relative to the February average for 5-percent broken regular milled white rice. For the week ending April 2, Vietnam's 5-percent broken regular milled white rice was quoted at \$460 per ton, up \$41 from the week ending March 26, and up \$45 from the week ending March 5.

U.S. prices for long-grain milled rice are mostly unchanged compared to the March average. For the week ending April 3, prices for high-quality U.S. Southern long-grain rice (No. 2, 4-percent broken, bagged, free on board (fob) vessel, U.S. Gulfport) were quoted at \$590 per ton, down \$5 from the week ending March 6. The U.S. price difference over Thailand's 100-percent Grade B milled rice declined to \$150 per ton from \$181 in early March. Prices for U.S. long-grain rough-rice (bulk, fob vessel, New Orleans) were quoted at \$310 per ton for the week ending April 3, down \$5 from the week end March 6. The California medium-grain milled rice (No. 1, 4-percent broken, sacked, free on board, domestic mill) quote for the week ending April 3 remained unchanged relative to the previous-month quote, at \$903 per ton. Export prices for California medium-grain milled-rice (4-percent broken, sacked, on board vessel in Oakland) were quoted at \$970 per ton for the week ending April 3, unchanged when compared to last month's quote. Price quotes for Vietnam, U.S. long- and medium-grain milled rice, and U.S. rough-rice export prices are from the weekly *Creed Rice Market Report*.

Commodity Focus

California rice area remains below pre-drought levels

Sharon Raszap Skorbiansky and Nathan Childs

Rice production depends heavily on access to water. Before seeding, farmers flood rice fields primarily to help the rice plant compete against weeds for nutrients and sunlight. California rice growers drain the fields before harvest starts, typically in late September, then re-flood them during the winter (between November and March). The post-harvest flooding helps to decompose rice straw; without flooding, the high silica content of the straw would cause it to degrade slowly. Historically, rice growers burned the remaining straw, but the Rice Straw Burning Reduction Act of 1991 largely phased out burning as the method of disposal. Other methods—such as baling (bundling the straw) —proved infeasible due to a limited market for the straw and high transportation costs (Petrie et al., 2014).

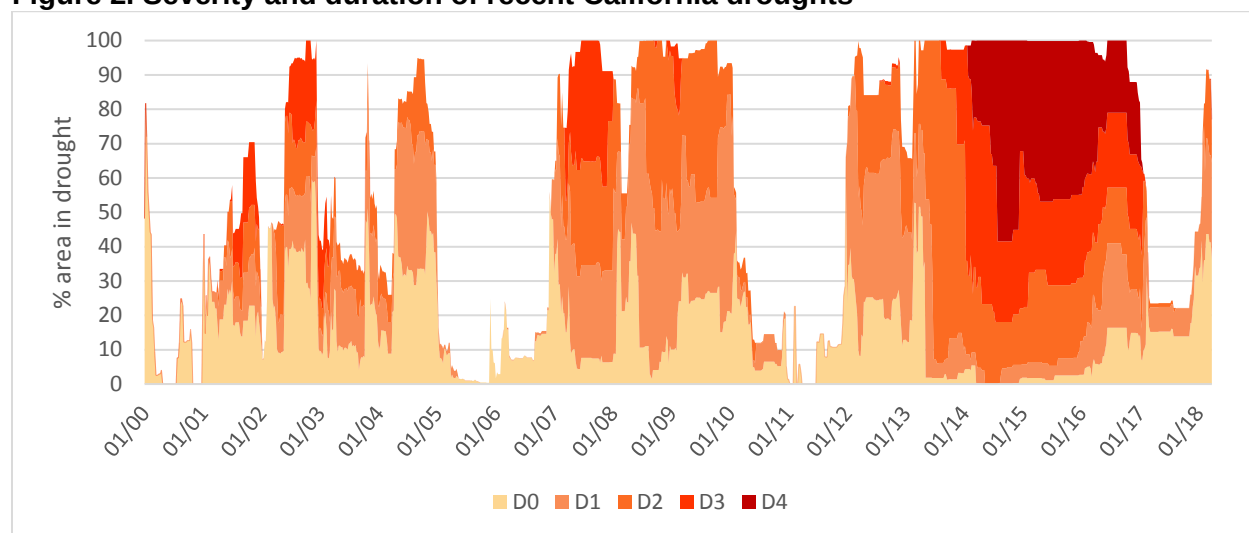
U.S. rice production is concentrated primarily in four regions, the Sacramento Valley in California, Arkansas Grand Prairie, Mississippi Delta, and Gulf Coast. California's rice production is about 90 percent medium-grain, typically accounting for over 60 percent of U.S. medium-grain production. Approximately half of U.S. medium-grain production is consumed domestically. Main importers of U.S. medium-grain include Japan, South Korea, Turkey, and Jordan.

About a third of California's freshwater supply emanates from snowpack—layers of ice and snow, melting during the Spring and feeding runoff into reservoirs. Farmers in California rely on the availability and delivery of water, but the State has experienced several periods of severe dryness and drought since 2000 (figure 2). The most recent drought lasted from 2012 until early 2017, although Northern California's rainfall was near-normal in 2016. By mid-2012, almost 60 percent of the State was experiencing conditions between abnormally dry and severe drought.

California growers receive water allocations primarily through long-run contracts with the Federal Bureau of Reclamation (USBR) and the California State Water Project (SWP). California water laws are complex and still changing, including distinctions for senior and junior water rights. Under the water contracts, when there is limited water availability, the amount of water actually delivered (the “allocation”) in a given year may be lower than the contracted (“requested”) amount. USBR allocated 100 percent of requests in only 14 of the past 21 years for all agricultural contractors north of the Sacramento–San Joaquin River Delta, which includes rice growers. USBR continuously updates estimated allocations based on the Sierra Nevada snowpack. The California “water year” runs from October to the following September, differing from the calendar year since

accumulated snowpack in the fall or winter may not melt until the following spring or summer. The bureau typically finalizes water year allocations after the April 1st snow survey, when the snowpack is largest. For example, in 2010, USBR announced an initial allocation of 5 percent, updated the allocation to 50 percent in March, and ultimately allocated 100 percent in April. Typically, California rice growers begin planting in late April and finish in June. When growers receive smaller allocations under severe drought conditions, uncertainty about future water availability impacts their planting decisions.

Figure 2. Severity and duration of recent California droughts



Note: D0 (Abnormally Dry), D1 (Moderate Drought), D2 (Severe Drought), D3 (Extreme Drought) D4 (Exceptional Drought).

Source: USDA, Economic Research Service based on data from The National Drought Mitigation Center (University of Nebraska-Lincoln, and USDA, National Oceanic and Atmospheric Administration, 2018).

In 2015, the most severe year of the recent drought, USBR Central Valley Project “agricultural contractors” received a final allocation of zero percent of requests, meaning that no water was delivered to these irrigators. However, some portion of the rice growers along the Sacramento River hold water rights that pre-date the creation of the Central Valley Project, which means that they are subject to different allocation rules. In 2015, these growers received 75 percent of their requests.

Rice growers can also receive reduced water allocations under the SWP. In late-February 2018, USBR announced a 20-percent initial allocation for agricultural contractors north of the Delta, and 100 percent for water right holders. The allocations are based on current low snowpack levels leading to a low runoff forecast (USBR, 2018). March storms greatly increased the snowpack; cumulative water year Northern Sierra Nevada precipitation increased from about 25 inches to 35 inches, though still below the historical average of 45 inches. These storms may still lead to higher water allocations for contractors in the current year.

When facing decreased water allocations at the Federal and State levels, growers search for alternative sources of water such as groundwater or water transfers. Groundwater supplies roughly 40 percent of water used in California's farms and cities, but the share increases during drought years when allocations are lower. As a result, groundwater basin withdrawals can exceed the amount replenished during drought years. In 2014, the Sustainable Groundwater Management Act required formation of groundwater management plans (adoption by 2020) to ensure future sustainability for stressed basins (Chappelle et al., 2017). In the absence of alternative water sources, growers may idle or fallow land. Faced with high water prices (due to low supply) and low rice prices, some rice growers idled land and sold their water allocations (Medellin-Azuara et al., 2016).

Aside from water issues, some rice acreage in the Sacramento valley has been lost to alternative crops, which have been more lucrative. During the most recent drought, amid sharply reduced water allocations and lower rice prices, the almond outlook was positive. The non-bearing acreage (new almond trees not producing fruit) increased every year from 2012 to 2016, previously having declined every year from 2009 to 2011. Some of this growth was due to growers replacing older trees as a water saving method, as non-bearing trees require less water. Bearing acreage increased on average by 3 percent each year between 2012 and 2016, and is estimated to reach a record of 1.0 million acres in 2017. Meanwhile, the price received for almonds increased each year from 2010 to 2014, though it dropped in 2015 and 2016 in response to increased supply and weak foreign demand (Swegal, 2017). After converting rice acreage to producing almonds, growers are unlikely to return land to rice in the short-term; nut trees such as almonds require substantial sunk costs, and take 3-4 years to start producing fruit.

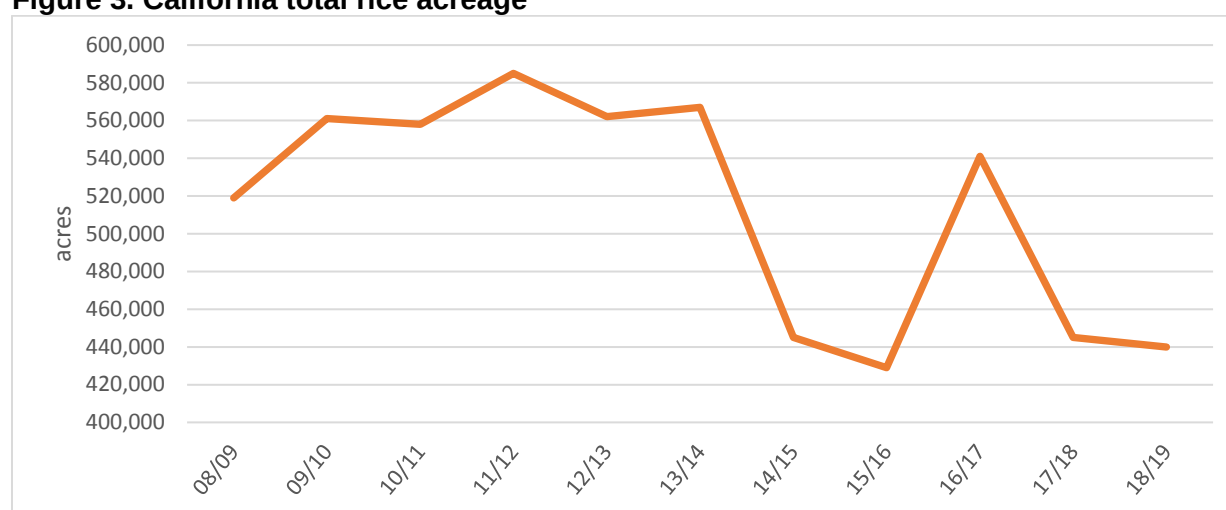
As a result of low water allocations, weak rice prices, and more lucrative crop opportunities, California rice acreage has trended lower (figure 3). Farmers' decisions to move production to other crops can be attributed to normal market forces (including market outlook and water usage). At the same time, the drought removes land from agricultural production. UC Davis Center for Watershed Sciences estimated that idled land increased by 7 percent due to the 2016 California drought (Medellin-Azuara et al., 2016).

Rice acreage decreased in 2014/15 and 2015/16, though it increased by 26 percent in 2016/17 when water availability returned to normal, while prices increased from 2013/14 to 2015/16, then decreased two years in a row. In 2017/18, early season flooding, pest and weed issues, and late season high temperatures decreased rice acreage again. Rice planted acreage has yet to return to levels before the recent drought. The NASS *Prospective Plantings* report released March 29 provides the first official rice acreage estimates for the marketing year 2018/19. Based on farmer

responses, NASS estimates California medium-grain acreage will drop by 4 percent and total California rice acreage will drop by 1 percent. The lower decrease in total California area is due to a 32-percent increase in short-grain, which is mostly planted and sold under contract.

The March *Prospective Plantings* show intentions for Arkansas, Louisiana and Missouri rice growers to increase medium-grain production by 22, 25, and 50 percent, respectively. The recent storm in California that boosted the Sierra Nevada snowpack, could lead to higher water allocations and larger rice acreage than the March estimate. The NASS *Acreage* report will be released June 29, and will provide the next update on U.S. expected rice planted and harvested acreage by class and State.

Figure 3. California total rice acreage



Source: USDA-NASS.

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Tables: The rice Outlook tables for April were not available for release with the monthly report. The tables will be released no later than April 19, 2018.

Contacts & Additional Information

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