

California Rice Production Outlook

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2011 Growing Season

- Overall another season that was challenging from a weather standpoint
- Difficult planting season once again
 - Weather
 - Periods of rain through most of March
 - Fairly dry April and early May
 - Periods of rain mid-April through first of June
 - Delayed planting on a portion of acreage
 - Difficult stand establishment, weed management and nitrogen management issues, cold blanking risk

2011 Growing Season

- **Fairly mild temperatures during June-August**
 - Extends vegetative stage
 - Delays heading and grain ripening
 - Usually leads to good yields
 - Problematic for late planted rice
- **Severe year for rice blast**
 - May be associated with late planting, cool season and shift of crop to later maturity
- **Significant rain and very cool temperatures Oct 3-10**
 - Everything looking good until we started getting appraisals

2011 Production Estimates

□ Acreage harvested

- **580,000 acres**
 - 3rd highest on record
 - 1981 593,000 acres

□ Yield

- **83.5 cwt/acre**
 - ~ 4% up over 2010

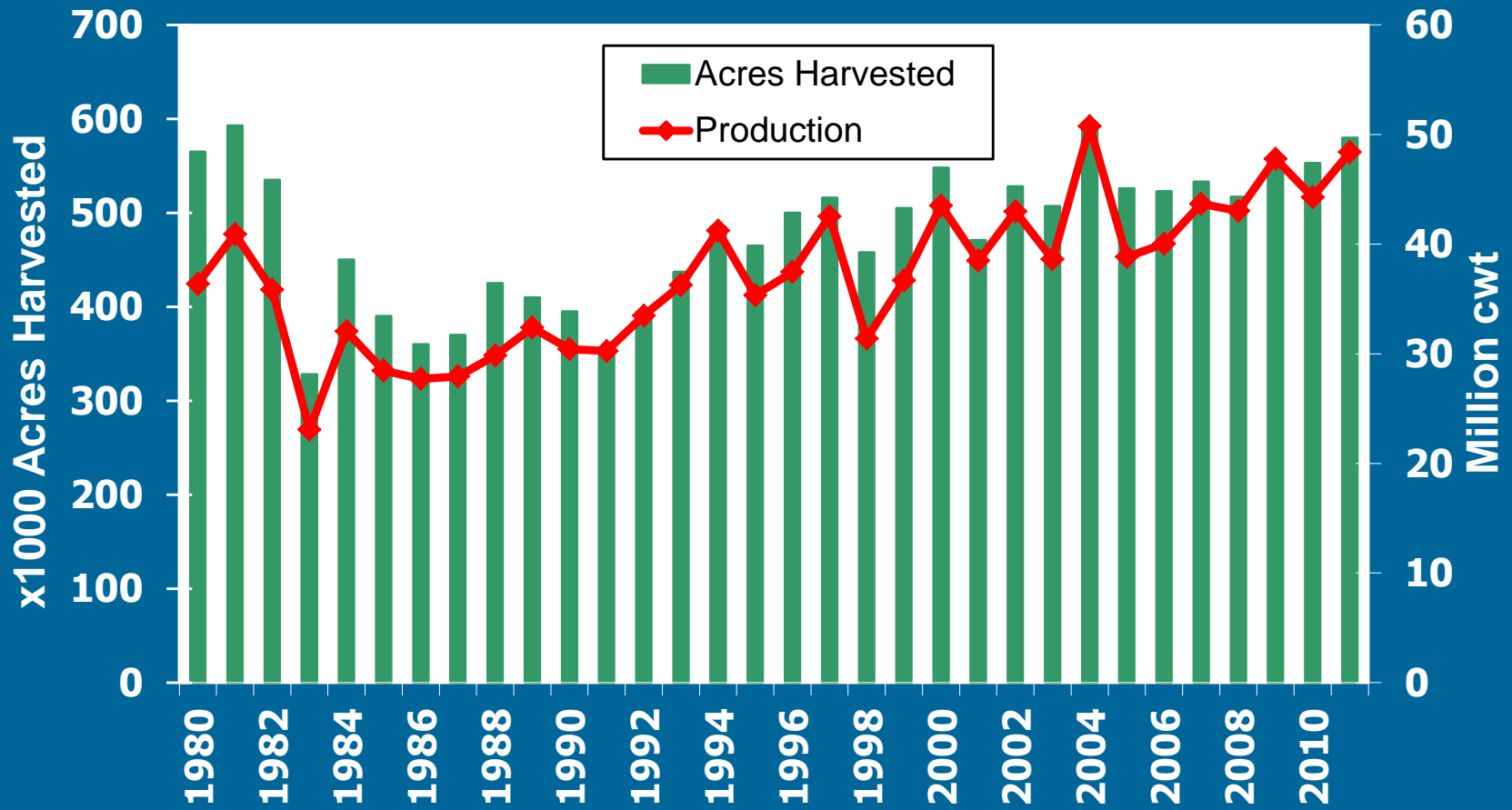
□ Production

- **48.4 million cwt**
- **~ 4 million cwt increase over 2010**
- **2nd highest on record**
 - Record 50.8 million cwt 2004

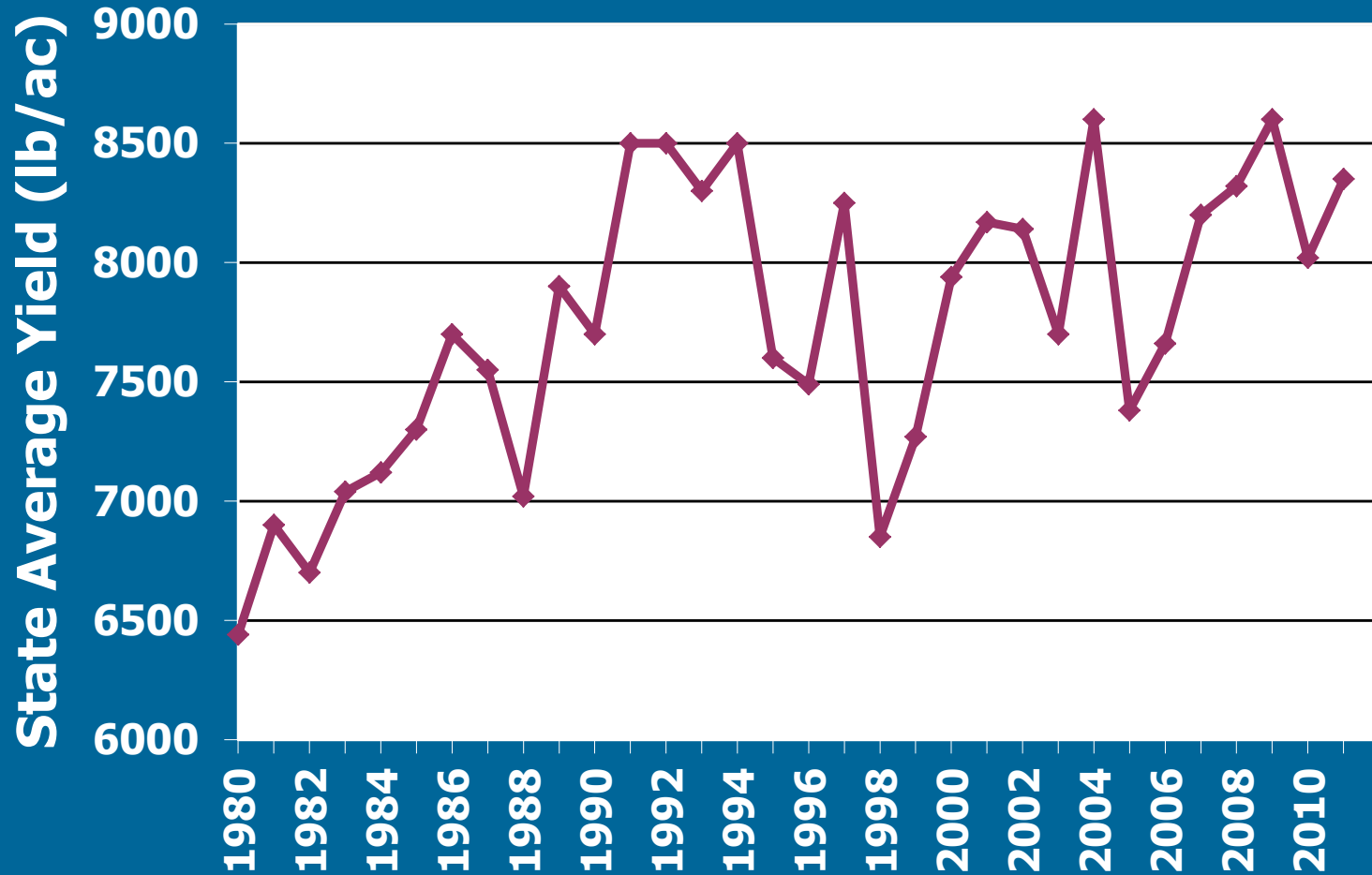


Source: USDA NASS

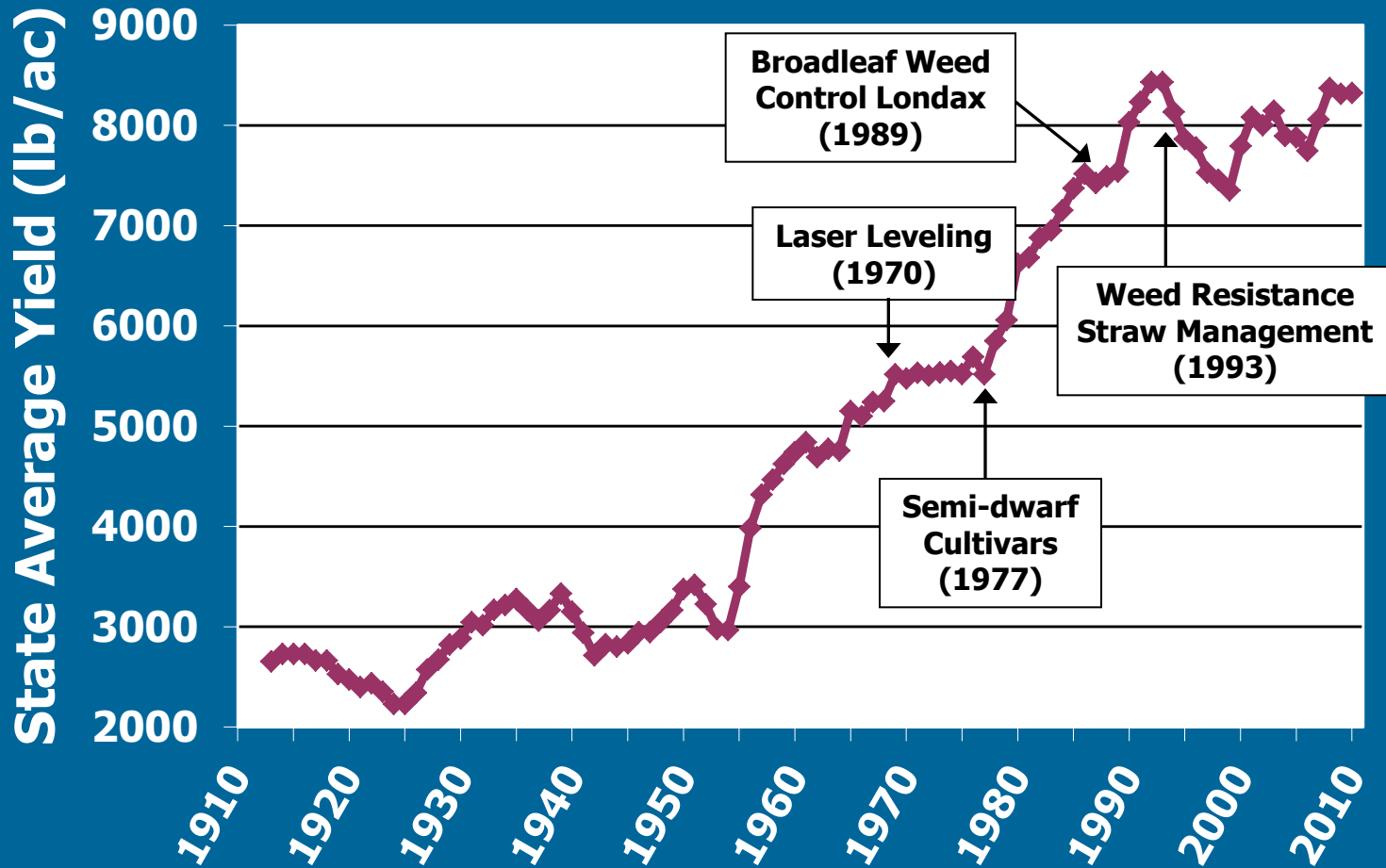
Acresage & Production, 1980-2011



California Rice Yields, 1980-2011



California Rice Yields, 1912-2010



Three Year Moving Average

Outlook for 2011 CA Rice Crop

- Total historic consumption (domestic and export) 40-44 million cwt CA rice
- Total 2011 supply 48.4 million cwt (45 million cwt med grain) CA rice + reasonable CA carry in
- Total US med grain production of 65.6 million cwt (Increase of ~15% from 2010)
- Prices for CA medium grain

Outlook for 2011 CA Rice Crop

- Supplies are still fairly tight
 - Market competitor exports
 - Australia – Drought easing
 - Has come roaring back
 - 54>350>450K metric tons export (milled basis)
 - Egypt restricted exports
 - Increased production but how much exported?
 - USDA estimates increase in exports to increase from 120 to 500K metric tons (milled basis)
 - Current view of export market
 - Japan, S. Korea WTO purchases
 - Eastern Mediterranean/Middle East
 - Pacific/Oceania

2011 CA Crop Outlook

- **Steady/Decreased acreage**
 - 550,000 - 575,000
- **Factors**
 - **Cost of production**
 - **Water availability**
 - **Price of rice**
 - **Market competitors**
- **Competition Heating Up**

