



# Southern USA Rice Quality for Latin America: Next Steps

June 2024

**Proven to Perform**



# Objective

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To help facilitate the USA being considered  
a **gold standard long grain rice supplier**  
for its Latin American customers



# Benefits

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## Reverse the downward trend of southern USA rice acres

- Fosters investment for technological advances
- Continue to provide a viable crop option for USA farmers
- Rice is economically important for rural communities



# History

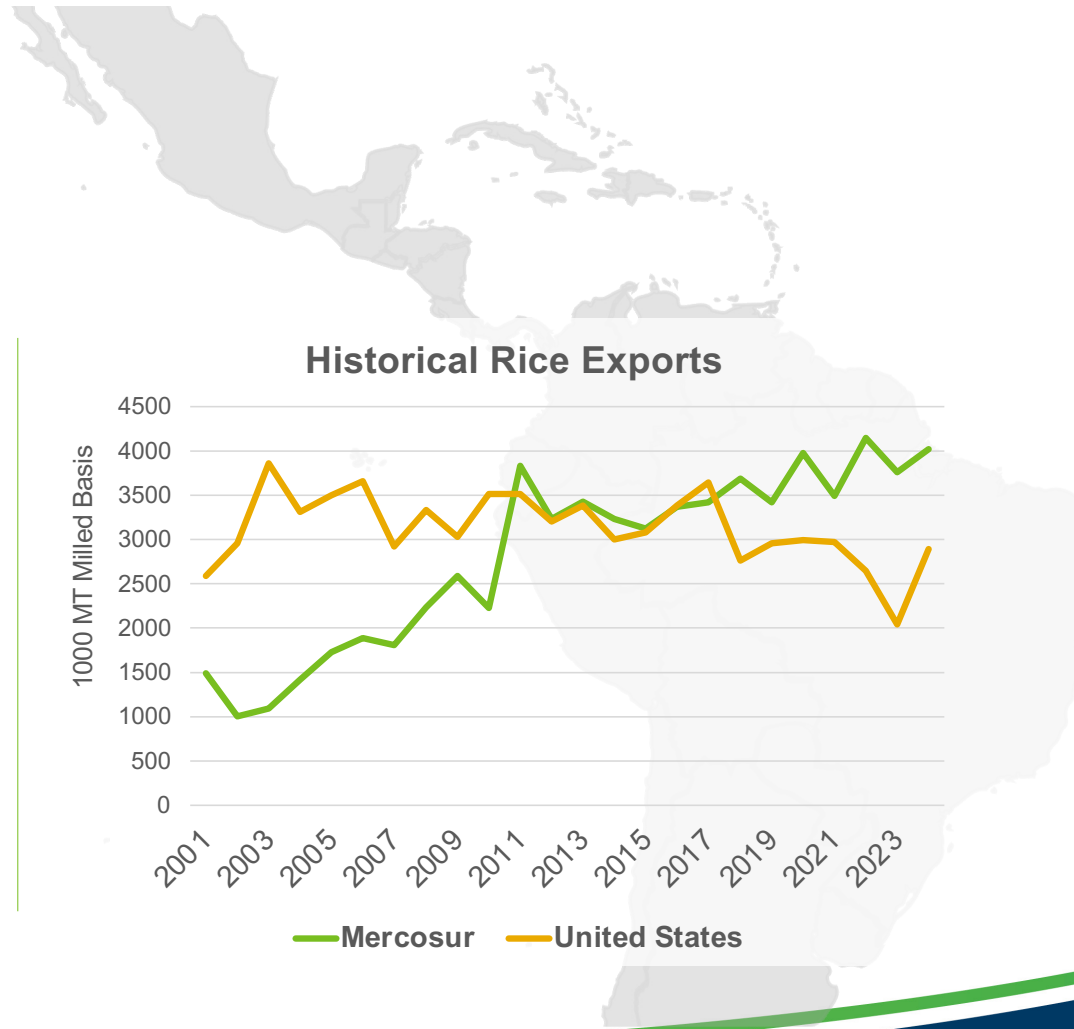
- From MY 2001-2010, the USA supplied nearly 100% of the imports of Mexico and Central America
- From MY 2011-2020, reductions were seen in each country
- Continued reductions were seen from 2020-2023 in all but Nicaragua



Country	% of Imports supplied by USA		
	2001-2010	2011-2020	2020-2023
Mexico	99%	82%	55%
Costa Rica	98%	50%	17%
El Salvador	95%	78%	50%
Guatemala	91%	88%	60%
Honduras	97%	91%	77%
Nicaragua	96%	29%	75%

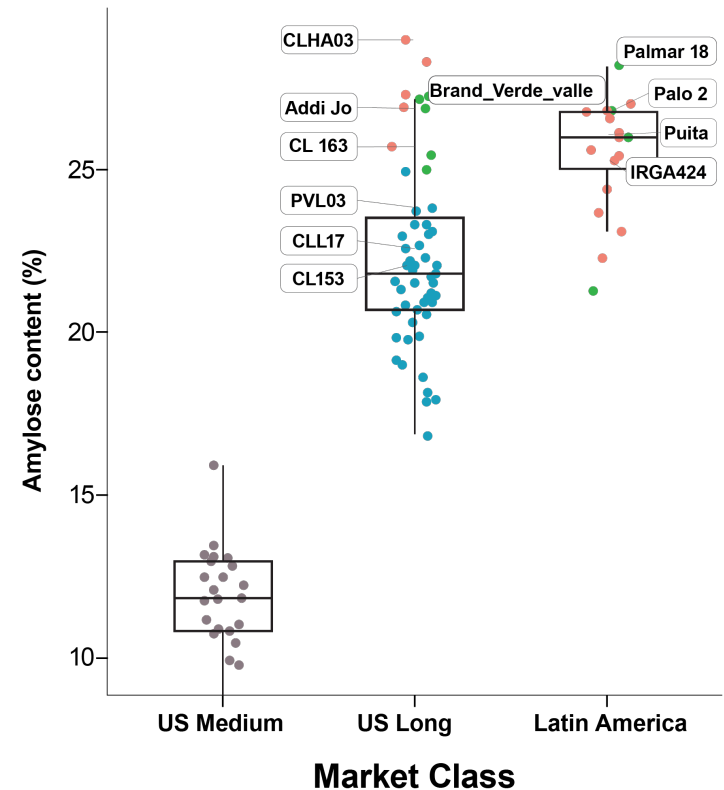
# Factors Impacting Decreased USA Exports

- Increases in Mercosur Exports
- Quality
  - Chalk (favors Mercosur)
  - Stickiness (favors Mercosur)
- Price



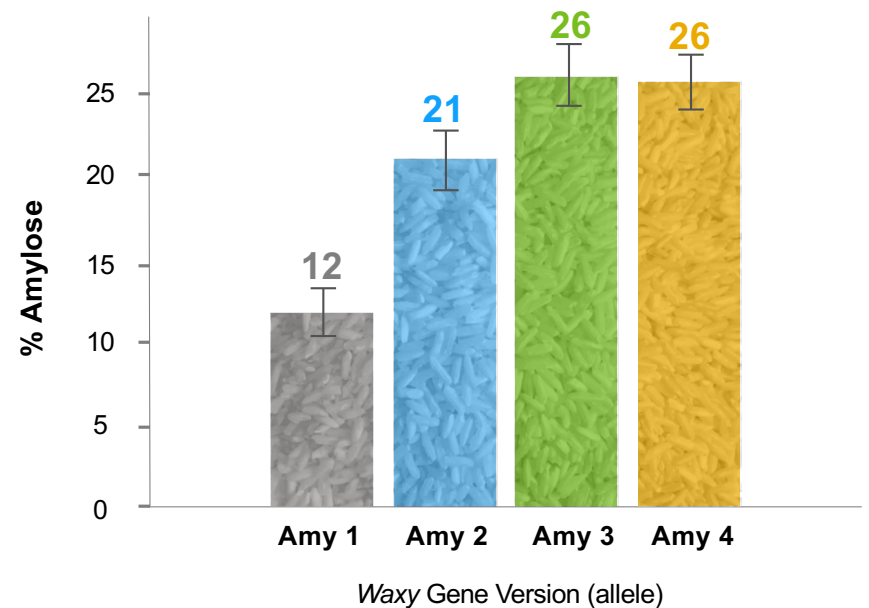
## Progress Made in Varieties

- USA breeders (Famoso et. al.) have sorted through the subjectivity regarding “quality”
- Amylose content and RVA profile is the major differentiator in final cooked rice (stickiness)
- There is southern USA germplasm that contains high amylose and intermediate gel temp
  - 1980's 'Newrex', 'Rexmont'
  - 1990's 'Dixiebelle'
  - 2000's – 'Sabine', 'Bowman'
  - 2010's – 'CL163', 'Thad'
  - 2020's – 'AddiJo', 'CLHA03'



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- Genetic selection on 'Amy4' allele has similar cook characteristics to Indica type



## Call to Action

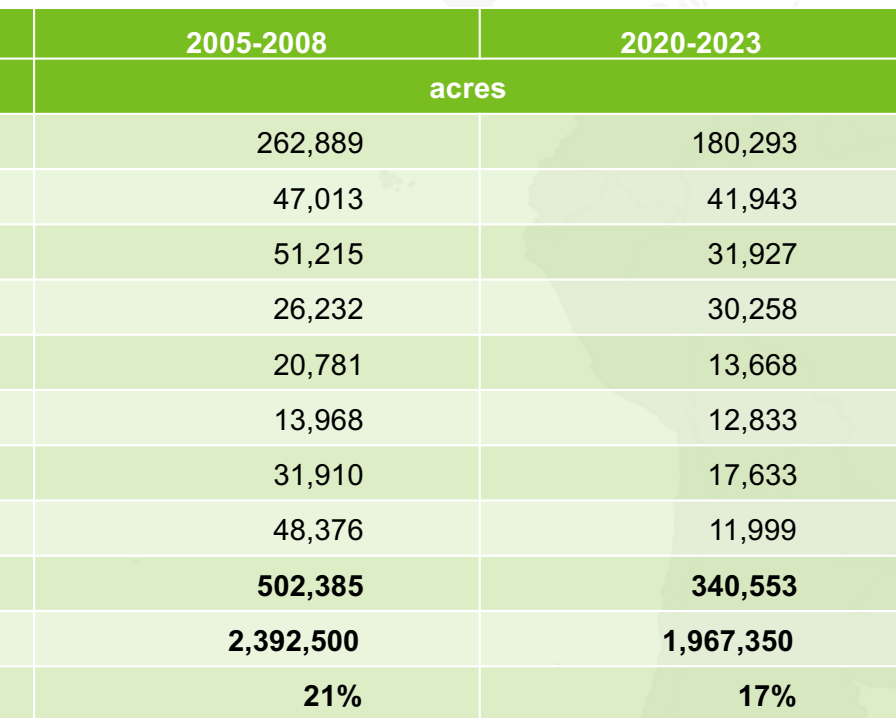
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- >10 years of conversation about all southern USA rice quality has not impacted major change
  - Challenge for buyers and merchants to think more strategic/smaller scale
  - Southern USA medium grain is usually about 10% of the market
  - In 2023, southern USA aromatic accounted for about 1-2% of the market
- Historically, 'Amy 4' high amylose varieties have been grown on about 5K +/- acres for processing
  - All of these 'segments' are
    - Identity preserved
    - Contracted prior to planting
    - Derive a market premium





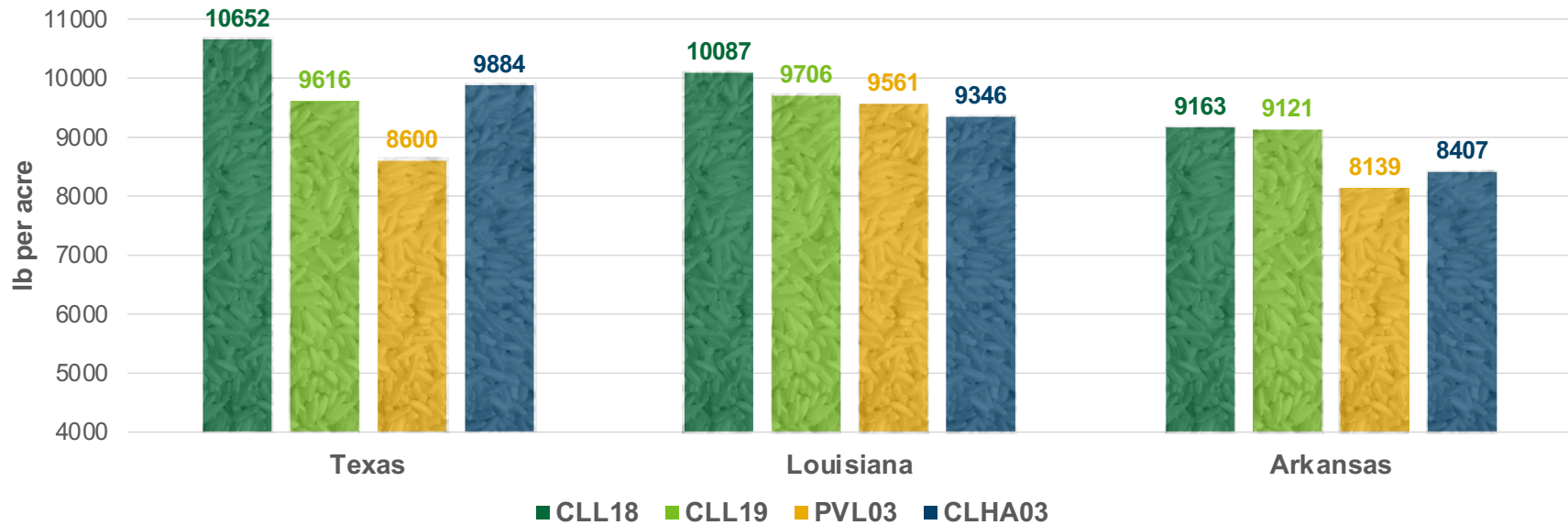
## Call to Action



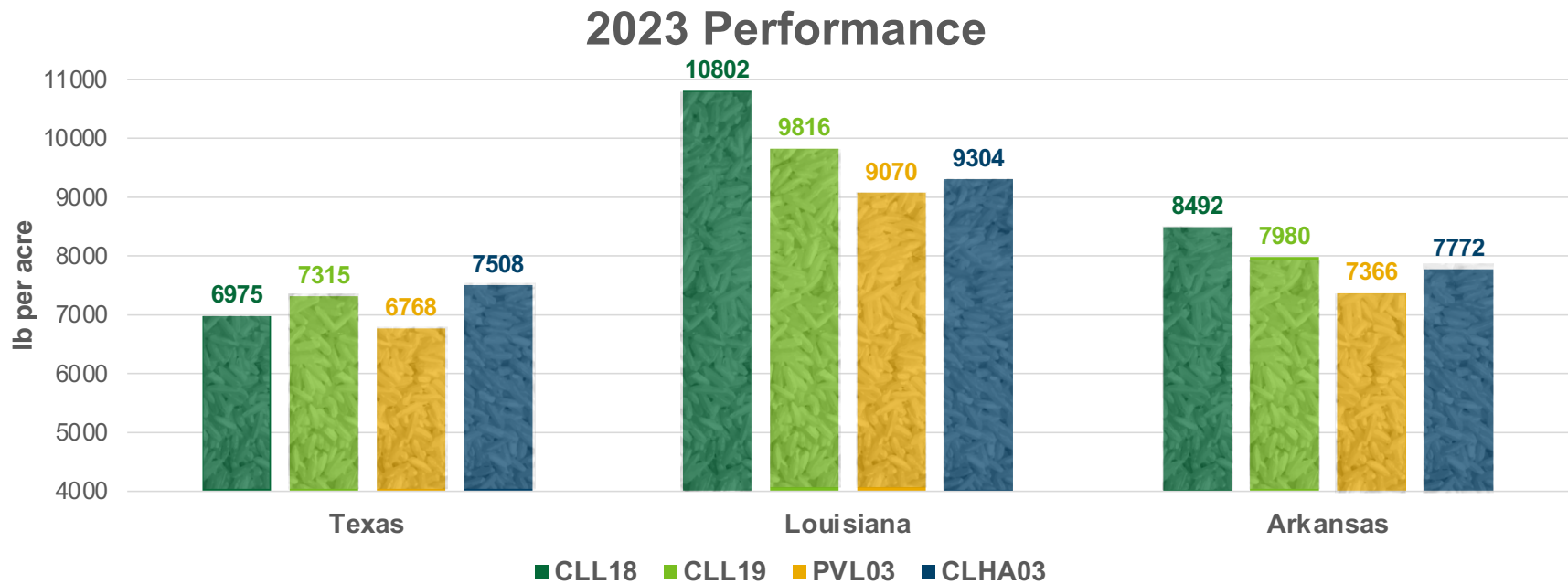
Time Period	2005-2008	2020-2023
Country	acres	
Mexico	262,889	180,293
Honduras	47,013	41,943
Nicaragua	51,215	31,927
Guatemala	26,232	30,258
Panama	20,781	13,668
Dominican Republic	13,968	12,833
El Salvador	31,910	17,633
Costa Rica	48,376	11,999
<b>Total Acres</b>	<b>502,385</b>	<b>340,553</b>
<b>Southern Long Grain Acres (FSA)</b>	<b>2,392,500</b>	<b>1,967,350</b>
<b>% of Southern Long Grain Acres</b>	<b>21%</b>	<b>17%</b>

# New CLHA03 in 2025

## 2022 Performance



# New CLHA03 in 2025



## Summary

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- >10 years of conversation about all southern USA rice quality has not impacted major change
- Challenge for buyers and merchants to think more strategic/smaller scale
- Buyers, if you have a percentage or all of your market where you desire something better than U.S. #2, increase your spec's
- Merchants, be aware of what is going on in R&D, and what is available
- Horizon Ag is passionate about the rice industry, and we are working diligently to be part of the solution
  - Farmers
  - Millers/Merchants
  - Export Customers





**Thank you**

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