



ASEAN FOOD SECURITY INFORMATION SYSTEM

ASEAN AGRICULTURAL COMMODITY OUTLOOK

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**ASEAN FOOD SECURITY
INFORMATION SYSTEM (AFSIS)**

Report on

ASEAN Agricultural Commodity Outlook

No. 32 June 2024

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This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 32, along with its predecessors, stands as a valuable resource benefiting all ASEAN members, policy makers, and relevant agencies. These reports serve as essential tools for planning and policymaking, crucial in ensuring food security within individual nations and the ASEAN regions.

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Lastly, I am deeply grateful to all other AFSIS staff members for their dedication and hard work in the execution of all AFSIS activities. Your collective efforts have significantly contributed to the achievements of our organization, and for that, I am truly thankful.

Thank you



Computer Technical Officer, Senior Professional Level
Dr. Sumanya Ngandee
AFSIS Manager

Foreword

The ASEAN Agricultural Commodity Outlook (ACO) Report is a situation analysis of both the supply and demand of food crops for the current year and forecasts for the subsequent year, prepared by the ASEAN Food Security Information System (AFSIS) Secretariat. This report compiles data from the 10 ASEAN member states. As with previous editions, it covers the current situation and outlook for five main commodities: rice, maize, sugarcane, soybeans, and cassava.

In this preface of ASEAN Agricultural Commodity Outlook, we provide both national and regional information on production, utilization, monitoring the global food crisis and food insecurity, stock, trade, and FOB/CIF prices. The explanation for significant changes and unusual phenomena is also showed in this report. Furthermore, the report is scrutinized by all member states before publication.

AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives



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Rice Outlook for 2025

Highlights

The forecast for rice supply in ASEAN predicts to rise 8.19 million tons or 4.90 percent from 167.14 million tons in 2024 to 175.33 million tons in 2025 of milled rice (Table 1). This increasing in supply is primarily attributed to the beginning stock and production carried over from the previous year. The beginning stock is forecasted to increase by 7.97 million tons or 26.81 percent increase from 29.73 million tons in 2024 to 37.70 million tons in 2025. The rice production in 2025 is forecasted to be 128.71 million tons, increasing from 127.49 million tons in 2024, or 1.22 million tons increase. On the other hand, imports are forecasted to decrease by 1.01 million tons or 10.18 percent from 9.92 million tons in 2024 to 8.91 million tons in 2025.

The demand of rice is primarily attributed to the export and ending stock carried over from the previous year. The rice export is expected to increase 0.57 million tons or 2.94 percent from 19.36 million tons in 2024 to 19.93 million tons in 2025. The ending stock is expected to increase 7.72 million tons or 20.48 percent from 37.70 million tons in 2024 to 45.42 million tons in 2025. Never less, the domestic utilization is forecast to decrease by 0.10 million tons or 0.09 percent from 110.08 million tons in 2024 to 109.98 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2025 is expected to increase 117.03 percent. Additionally, the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 34.28 percent in 2025 (Table 1).

Table 1 Summary of the ASEAN rice situation, 2024-2025 (milled rice)

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	167.14	175.33	8.19	4.90
Beginning stock	29.73	37.70	7.97	26.81
Production	127.49	128.71	1.22	0.96
Import	9.92	8.91	-1.01	-10.18
Demand (Million tons)	167.14	175.33	8.19	4.90
Domestic utilization	110.08	109.98	-0.10	-0.09
Export	19.36	19.93	0.57	2.94
Ending stock	37.70	45.42	7.72	20.48
Ratio of production to domestic utilization (%)	115.81	117.03	1.22	-
Ratio of beginning stock to domestic utilization (%)	27.01	34.28	7.27	-

ASEAN Rice Situation in 2024

► *Production*

The estimated paddy production in ASEAN for the crop year 2023/24, reported in 2024 at 197.64 million tons, marking a growth of 0.30 million tons or 0.15 percent compared to the 197.35 million tons recorded in the previous crop year of 2022/23. This increasing was attributed to expansions in yield 0.01 ton/hectare or 0.23 percent from 4.33 ton/hectare in 2023 to 4.34 ton/hectare in 2024. The increase in production observed in Brunei, Cambodia, Myanmar, Philippines and Vietnam. (Table 2-5, Figure 1-4).

For Brunei in 2024, the increase in production was attributed to a rise in both planted area and yield. The planted areas were resulted from favorable weather and supportive by government policy. The increase in yield increased by favorable weather, the use of improved varieties, increased fertilizer use, and better farmer care.

For Cambodia in 2024, the increase in rice production was attributed to the rise in planted area and yield. The increase in planted areas resulted from farmers responding to a price increase, an increasing export of processed agricultural products to 12 percents of all exports by industry policy, favorable weather, and a decrease in the price of competing crops. The increase in yield was a result of using more improved varieties and increased fertilizer application.

For Indonesia in 2024, the decrease in production was attributed to a decrease in both planted area and yield. The reduction in planted area was due to unfavorable weather caused by the El Niño effect and competition with other commodities such as food crops and horticulture. Similarly, the decrease in yield was also caused by unfavorable weather, such as drought and the El Niño effect in some parts of Indonesia.

For Lao PDR in 2024, the increase in yield was attributed to favorable weather and farmers' utilization of improved varieties. Meanwhile, the decrease in planted area was influenced by increases in the price of competing crops and the shift to high cash crops.

For Malaysia in 2024, the increase in yield was influenced by farmers using more improved varieties and taking better care of their crops. Meanwhile, the decrease in planted area was due to unfavorable weather conditions including drought.

For Myanmar in 2024, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to a price increase and favorable weather. Similarly, the increase in yield was influenced by favorable weather and farmers taking better care of their crops.

For Thailand in 2024, the decrease in production was due to the decrease in both planted area and yield. The decrease in planted areas was attributed to unfavorable weather conditions, such as El Niño. Similarly, the decrease in yield was attributed to unsuitable weather conditions, including drought and insufficient water availability for the growth of rice plants, with some areas facing Leaf Blight disease.

For Vietnam on 2024, the increase in planted areas resulted from a decrease in the price of competing crops, while the decrease in yield was due to farmers applying less fertilizer to their crops.

► *Utilization and Stock*

The estimated domestic utilization of rice (milled rice) in ASEAN for the calendar year 2024 decreased by 4.66 million tons or 4.06 percent from 114.74 million tons in 2023 to 110.08 million tons in 2024 (Table 7-8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2024 was estimated at 115.81 percent ratio, a slight increase from 110.52 percent ratio in 2023. The rice production in ASEAN during 2024 was still sufficient to meet regional demand. The self-sufficiency ratio increased in Brunei, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, and Vietnam, while it decreased in Thailand. The highest ratio was found in Thailand, Cambodia and Vietnam (Table 10, Figure 12). However, on a country-by-country basis, some countries in the region still needed to import rice for their domestic consumption.

The beginning stock in 2024 of ASEAN was estimated at 29.73 million tons, increasing 2.23 million tons or 8.12 percent from 27.50 million tons in 2023 (Table 7-8). The ratio of the beginning stock to the domestic utilization (food security ratio) in 2024 for the whole ASEAN was estimated at 27.01 percent, which represents a slight increase by 3.05 percent from the previous year. Myanmar and Thailand have ratios above 50 percent of the optimum level. Myanmar is highest at 74.45 percent while Cambodia has 41.46 percent and other countries are below 30 percent (Table 11, Figure 13).

For the overall rice production, the staple food of the ASEAN region which demonstrates that many countries in the region have **self-dependency in terms of food production and food security.** However, ASEAN country face considerable challenges amid recent climate change, geopolitical conflict and evolving trade policies. The factors including an intensified El Niño, the conflict in Ukraine, and growing trade restrictions across South East Asia have collectively led to a deficit in the global supply of rice.

► **Trade**

In 2024, the entire ASEAN region exported 19.36 million tons of milled rice, marking a decrease of 0.29 million tons or 1.50 percent compared to the 19.65 million tons exported in 2023. Additionally, the two primary exporting countries, Vietnam and Thailand, exporting approximately 9.65 million tons and 8.00 million tons, respectively in 2024 (Table 7-8 and Figure 5-6)

The total import by ASEAN in 2024 is estimated to be 9.92 million tons, an increase of 0.11 million tons or about 1.12 percent from 9.81 million tons in 2023. In the Philippines, the import of milled rice was 3.80 million tons in 2024 which was the biggest the importer in ASEAN region (estimated by AFSIS Table 7-8, Figure 8-9).

► **Prices**

The quantity and value of rice exported from ASEAN countries by countries of destination and the quantity and value of imported by countries of origin are given in Table 12-13.

Monthly FOB prices for rice exports and CIF prices for rice imports in selected ASEAN countries during 2023-2024 (January-December) are shown in Tables 14-15 and Figures 14-16.

► **Damaged Area**

In the crop year 2023/24, the estimated damaged area of paddy in ASEAN for 2024 amounted to 37,929 hectares. 12,301 hectares or 32.43 percent were attributed to flooding, and 12,427 hectares, also constituting 32.43 percent were attributed to drought. Myanmar bore the brunt of the flood damage, accounting for 12,277 hectares or 32.37 percent of the total damage across ASEAN. Additionally, factors such as pests and diseases contributed to the overall damage (Table 6).

Prospects for Rice in 2025

► *Production*

ASEAN paddy production in 2025 (crop year 2024/25) is estimated at 199.66 million tons, increasing by 2.02 million tons, which is 1.02 percent from 197.64 million tons in 2024 (crop year 2023/24) (Table 2-5, Figure 1-4).

► *Utilization and Stock*

The domestic utilization of milled rice in ASEAN in 2025 is expected to be 109.98 million tons, decreasing about 0.10 million tons or 0.09 percent compared to 110.08 million tons in 2024 (Table 8-9).

The beginning stock for 2025 is forecasted to be 37.70 million tons or increase of 7.97 million tons or 26.81 percent from the 29.73 million tons recorded in 2024. Additionally, the ending stock is expected to see a rise of 7.72 million tons or 20.48 percent, growing from 37.70 million tons in 2024 to 45.42 million tons in 2025 (Table 8-9 and Figure 11).

The ratio of production to domestic utilization (**self-sufficient ratio**) is forecast to be 117.03 percent in 2025, which will increase from 115.81 percent in 2024. **This indicates that rice production in ASEAN is still enough for consumption within the region** (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in ASEAN in 2025 is forecasted to increase at 34.28 percent from 27.01 percent in 2024 (Table 11, Figure 13).

► *Trade*

The milled rice imports of ASEAN is forecasted to decrease from 9.92 million ton in 2024 to 8.91 million tons in 2025, decrease of 1.01 million tons or about 10.16 percent (Table 8-9, Figure 8 and 10).

For the export, the whole ASEAN is forecasted to export 19.92 million tons in 2025, increase of 0.57 million tons or about 2.94 percent compared to 19.35 million tons in 2024 (Table 8-9, Figure 5 and 7).

Table 2 Paddy production in ASEAN countries, 2023 - 2025

Unit: 1,000 Tons

Country	2023(2022/23)	2024(2023/24)	change2024 over 2023		2025 (2024/25)	2025(2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	197,345.15	197,644.96	299.81	0.15	199,662.12	2,017.16	1.02
Brunei	3.73	4.03	0.30	8.15	4.36	0.33	8.15
Cambodia	12,497.23	13,474.67	977.44	7.82	13,878.91	404.24	3.00
Indonesia	53,625.54	52,510.22	-1,115.32	-2.08	53,510.91	1,000.69	1.91
Lao PDR	3,900.20	3,860.80	-39.40	-1.01	4,018.00	157.20	4.07
Malaysia	2,166.74	2,143.15	-23.59	-1.09	2,137.45	-5.70	-0.27
Myanmar	27,990.92	28,340.76	349.84	1.25	*29,166.36	825.60	2.91
Philippines	20,038.91	*20,076.49	37.59	0.19	*20,114.14	37.66	0.19
Singapore	N/A						
Thailand	33,629.51	33,049.21	-580.29	-1.73	*32,621.96	-427.24	-1.29
Vietnam	43,492.38	44,185.62	693.24	1.59	44,210.00	24.38	0.06

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 3 Paddy planted area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023(2022/23)	2024(2023/24)	change2024 over 2023		2025 (2024/25)	2025(2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	46,310.03	46,277.93	-32.11	-0.07	46,281.67	3.74	0.01
Brunei	1.53	1.63	0.11	6.96	1.69	0.06	3.81
Cambodia	3,549.35	3,744.71	195.36	5.50	3,793.39	48.68	1.30
Indonesia	10,327.65	10,259.91	-67.74	-0.66	10,328.30	68.39	0.67
Lao PDR	1,003.37	949.91	-53.46	-5.33	956.03	6.12	0.64
Malaysia	614.84	604.87	-9.97	-1.62	602.56	-2.31	-0.38
Myanmar	7,094.92	7,180.50	85.58	1.21	*7,269.44	88.95	1.24
Philippines	*4,848.01	*4,790.42	-57.59	-1.19	*4,733.52	-56.90	-1.19
Singapore	N/A						
Thailand	11,751.07	11,501.85	-249.22	-2.12	*11,350.71	-151.13	-1.31
Vietnam	7,119.29	7,244.12	124.83	1.75	7,246.00	1.88	0.03

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 4 Paddy harvested area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023(2022/23)	2024(2023/24)	change2024 over 2023		2025 (2024/25)	2025(2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	45,601.79	45,509.89	-91.89	-0.20	45,960.34	450.45	0.99
Brunei	1.45	1.53	0.07	5.00	1.60	0.08	5.00
Cambodia	3,512.92	3,709.30	196.39	5.59	3,772.36	63.06	1.70
Indonesia	10,213.71	10,259.91	46.21	0.45	10,328.30	68.39	0.67
Lao PDR	993.67	949.91	-43.76	-4.40	956.03	6.12	0.64
Malaysia	614.84	604.87	-9.97	-1.62	602.56	-2.31	-0.38
Myanmar	7,090.30	6,766.19	-324.11	-4.57	*7,269.44	503.26	7.44
Philippines	*4,848.01	*4,790.42	-57.59	-1.19	*4,733.52	-56.90	-1.19
Singapore	N/A						
Thailand	11,211.66	11,183.64	-28.02	-0.25	*11,050.51	-133.12	-1.19
Vietnam	7,115.23	7,244.12	128.89	1.81	7,246.00	1.88	0.03

Remark: * The value is estimated by AFSIS Secretariat, ** Vietnam reported only planted area. N/A refers to data that is not available.

Table 5 Paddy yield in ASEAN countries, 2023 – 2025

Unit: Ton/Hectare

Country	2023(2022/23)	2024(2023/24)	change2024 over 2023		2025 (2024/25)	2025(2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	4.33	4.34	0.01	0.23	4.34	0.00	0.00
Brunei	2.57	2.64	0.07	2.72	2.72	0.08	3.03
Cambodia	3.56	3.63	0.07	1.97	3.68	0.05	1.38
Indonesia	5.25	5.12	-0.13	-2.48	5.18	0.06	1.17
Lao PDR	3.93	4.06	0.13	3.31	4.20	0.14	3.45
Malaysia	3.52	3.54	0.02	0.57	3.55	0.01	0.28
Myanmar	3.95	4.19	0.24	6.08	*4.01	-0.18	-4.30
Philippines	*4.13	*4.19	0.06	1.45	*4.25	0.06	1.43
Singapore	N/A						
Thailand	3.00	2.96	-0.04	-1.33	*2.95	-0.01	-0.34
Vietnam	6.11	6.10	-0.01	-0.16	6.10	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 6 Paddy damaged area in ASEAN by cause of damage, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	12,301	12,427	4,408	8,120	673	-	37,929
Brunei	24	27	27	28	-	-	106
Cambodia	-	12,400	4,381	8,092	-	-	24,873
Indonesia	-	-	-	-	-	-	0
Lao PDR	-	-	-	-	-	-	0
Malaysia	-	-	-	-	-	-	0
Myanmar	12,277	-	-	-	673	-	12,950
Philippines	-	-	-	-	-	-	0
Singapore	-	-	-	-	-	-	0
Thailand	-	-	-	-	-	-	0
Vietnam	-	-	-	-	-	-	0

Remark: N/A refers to data that is not available.

Table 7 Rice balance sheet of ASEAN countries, 2023 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	27,496,629	126,822,057	9,810,876	164,129,562	114,747,498	19,652,307	29,729,756	164,129,562
Brunei	17,798	2,422	17,179	37,399	29,751	-	7,648	37,399
Cambodia	*1,646,059	7,998,228	-	9,644,287	6,384,115	656,323	2,603,849	9,644,287
Indonesia	4,064,238	34,331,071	2,715,858	41,111,167	36,975,209	1,559	4,134,399	41,111,167
Lao PDR	37,353	2,340,120	70,815	2,448,288	2,401,144	16,935	30,209	2,448,288
Malaysia	-	1,386,712	1,400,776	2,787,488	*2,664,040	123,448	-	2,787,488
Myanmar	12,247,491	*1,7634,277	23	29,881,791	17,523,262	1,002,357	11,356,172	29,881,791
Philippines	*1,900,000	*13,000,000	*3,600,000	18,500,000	*16,400,000	-	2,100,000	18,500,000
Singapore	-	-	434,027	434,027	277,231	156,796	-	434,027
Thailand	4,580,470	*21,859,178	15,749	26,455,398	10,970,250	8,763,266	6,721,882	26,455,398
Vietnam	3,003,220	28,270,047	1,556,449	32,829,716	21,122,496	8,931,623	2,775,597	32,829,716

Remark: * The value is estimated by AFSIS Secretariat.

Table 8 Rice balance sheet of ASEAN countries, 2024 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	29,729,756	127,488,869	9,921,010	167,139,636	110,083,530	19,356,809	37,699,297	167,139,636
Brunei	7,648	2,620	27,149	37,417	28,321	-	9,096	37,417
Cambodia	2,603,849	8,623,790	-	11,227,640	6,280,895	669,449	4,277,295	11,227,640
Indonesia	4,134,399	33,617,043	2,487,878	40,239,321	34,377,630	2,759	5,858,931	40,239,321
Lao PDR	30,209	2,316,480	28,968	2,375,657	*2,325,148	23,053	27,455	2,375,657
Malaysia	-	1,371,616	1,135,188	2,506,804	*2,385,249	*121,554	-	2,506,804
Myanmar	11,356,172	*17,854,678	-	29,210,850	15,252,497	682,535	13,275,818	29,210,850
Philippines	2,100,000	*13,500,000	*3,800,000	19,400,000	*16,900,000	-	2,500,000	19,400,000
Singapore	-	-	427,239	427,239	226,631	200,608	-	427,239
Thailand	6,721,882	*21,481,987	*9900	28,213,769	11,042,150	8,000,000	9,171,619	28,213,769
Vietnam	2,775,597	28,720,654	2,004,688	33,500,939	21,265,008	9,656,850	2,579,082	33,500,939

Remark: * The value is estimated by AFSIS Secretariat.

Table 9 Rice balance sheet of ASEAN countries, 2025 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	37,699,297	128,713,859	8,913,086	175,326,242	109,982,792	19,925,243	45,418,206	175,326,242
Brunei	9,096	2,833	25,325	37,255	27,813	-	9,442	37,255
Cambodia	4,277,295	8,882,504	-	13,159,799	6,793,210	682,838	5,683,751	13,159,799
Indonesia	5,858,931	34,257,686	937,823	41,054,440	34,750,415	2,498	6,301,527	41,054,440
Lao PDR	27,455	2,410,800	-	2,438,255	*2,414,816	-	23,439	2,438,255
Malaysia	-	1,367,970	*919,955	2,287,925	*-2,168,236	*119,688	-	2,287,925
Myanmar	13,275,818	*18,374,809	-	31,650,628	*13,762,002	*464,758	17,423,867	31,650,628
Philippines	2,500,000	*13,476,478	*4,011,111	19,987,590	*17,415,243	-	2,572,346	19,987,590
Singapore	-	-	430,633	430,633	251,931	178,702	-	430,633
Thailand	9,171,619	*21,204,278	*6,223	30,382,121	11,074,150	8,030,000	11,277,971	30,382,121
Vietnam	2,579,082	28,736,500	2,582,015	33,897,597	21,324,975	10,446,758	2,125,865	33,897,597

Remark: * The value is estimated by AFSIS Secretariat.

Table 10 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	126,822,057	114,747,498	110.52	127,488,869	110,083,530	115.81	128,713,859	109,982,792	117.03
Brunei	2,422	29,751	8.14	2,620	28,321	9.25	2,833	27,813	10.19
Cambodia	7,998,228	6,384,115	125.28	8,623,790	6,280,895	137.30	8,882,504	6,793,210	130.76
Indonesia	34,331,071	36,975,209	92.85	33,617,043	34,377,630	97.79	34,257,686	34,750,415	98.58
Lao PDR	2,340,120	2,401,144	97.46	2,316,480	2,325,149	99.63	2,410,800	2,414,816	99.83
Malaysia	1,386,712	2,664,040	52.05	1,371,616	2,385,249	57.50	1,367,970	2,168,236	63.09
Myanmar	17,634,277	17,523,262	100.63	17,854,678	15,252,497	117.06	18,374,809	13,762,002	133.52
Philippines	13,000,000	16,400,000	79.27	13,500,000	16,900,000	79.88	13,476,479	17,415,244	77.38
Singapore	-	277,231	0.00	-	226,631	0.00	-	251,931	0.00
Thailand	21,859,179	10,970,250	199.26	21,481,987	11,042,150	194.55	21,204,278	11,074,150	191.48
Vietnam	28,270,047	21,122,496	133.84	28,720,654	21,265,008	135.06	28,736,500	21,324,975	134.76

Table 11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2023– 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	27,496,629	114,747,498	23.96	29,729,756	110,083,530	27.01	37,699,297	109,982,792	34.28
Brunei	17,798	29,751	59.82	7,648	28,321	27.00	9,096	27,813	32.70
Cambodia	1,646,059	6,384,115	25.78	2,603,849	6,280,895	41.46	4,277,295	6,793,210	62.96
Indonesia	4,064,238	36,975,209	10.99	4,134,399	34,377,630	12.03	5,858,931	34,750,415	16.86
Lao PDR	37,353	2,401,144	1.56	30,209	2,325,149	1.30	27,455	2,414,816	1.14
Malaysia	-	2,664,040	0.00	-	2,385,249	0.00	-	2,168,236	0.00
Myanmar	12,247,491	17,523,262	69.89	11,356,172	15,252,497	74.45	13,275,818	13,762,002	96.47
Philippines	1,900,000	16,400,000	11.59	2,100,000	16,900,000	12.43	2,500,000	17,415,244	14.36
Singapore	-	277,231	0.00	-	226,631	0.00	-	251,931	0.00
Thailand	4,580,470	10,970,250	41.75	6,721,882	11,042,150	60.87	9,171,619	11,074,150	82.82
Vietnam	3,003,220	21,122,496	14.22	2,775,597	21,265,008	13.05	2,579,082	21,324,975	12.09

Table 12 Quantity and Value of Rice Export by Countries of Destination in 2024

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia														
Indonesia			425	240,000										
Lao PDR														
Malaysia					40,501	22,259,852							0.50	748
Myanmar					267,735	156,626,000			25,299	14,773,000			72,389	40,570,000
Philippines	N/A													
Singapore	N/A													
Thailand	6,573	6,524,545	408	212,134	772,273	464,065,741	19,731	7,482,374	113,958	70,474,761	187	88,261	221,678	120,463,675
Vietnam			19,255	12,552,045	548,582	348,314,556			202,387	123,325,262			1,489,721	935,611,145

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total		
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values	
	Quantity	Values	Quantity	Values	Quantity	Values							
Brunei	N/A												
Cambodia							65,412		237,178			302,590	
Indonesia	0.440	1,394,000					425	241,394	0.44	2,779		426	244,173
Lao PDR					18,855	7,818,004	18,855	7,818,004	4,199	3,009,801		23,053	10,827,805
Malaysia	16.54	17,016					40,518	22,277,616				40,518	22,277,616
Myanmar	702	409,000			3,280	1,770,000	369,405	214,148,000	313,129	179,467,000		682,535	393,615,000
Philippines	N/A												
Singapore	N/A												
Thailand	39,381	34,939,663			4,614	2,778,526	1,178,804	707,029,680	2,219,341	1,491,659,579		3,398,145	2,198,689,259
Vietnam	65,667	42,446,770					2,325,612	1,462,249,778	844,197	2,037,172,241		3,169,809	3,499,422,019

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 13 Quantity and Value of Rice Import by Countries of Origin in 2024

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia			2,500	1,625,000					0.20	451	204,370	131,718,000		
Lao PDR											402	50,806		
Malaysia			24,681	19,347,931							8,750	5,050,646		
Myanmar	N/A													
Philippines	N/A													
Singapore			14,137	11,144,015	1.06	3,359			49	62,329	3,930	2,176,136		
Thailand			0.0010	9.07							0.0010	4.96	0.0020	28.14
Vietnam				454,868,128				6,606,441		345,431		18,325,814		

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.060	2.00	740,804	482,626,598	498,372	326,417,387	1,446,046	942,387,438	280,345.05	178,162,111	1,726,391	1,120,549,549
Lao PDR			14,982	4,188,379	687	384,399	16,071	4,623,584	12,897	8,732,522	28,968	13,356,106
Malaysia			160,300	101,616,768	133,969	88,251,120	327,701	214,266,464	377,089.82	239,267,613	704,790	453,534,077
Myanmar	N/A											
Philippines	N/A											
Singapore			128,601	115,593,685	185,551	122,448,143	332,269	251,427,667	138,433	111,888,945	470,702	363,316,612
Thailand	0.0010	4.68			586	383,094	586	383,141	2,714	76	3,300	383,217
Vietnam		1,992,375		2,738,330			-	484,876,520	-	124,639,226	-	609,515,746

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 14 FOB Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	MLYS ANGKOR Standard 5% broken	2023	1,375	1,380	1,400	1,380	1,380	1,300	1,148	1,100	850	870	900	1,000	1,174
		2024	950	940	950	940	930								
	Organic Parboiled Rice Standard 5% broken	2023	1,170	1,170	1,170	1,170	1,160	1,120	1,170	1,155	1,050	1,170	1,160	1,170	1,153
		2024	1,220	1,210	1,220	1,230	1,250								
Indonesia	Glutinous Rice	2023	2,982	809	650	1,958		598	13,668	2,538	3,710		1,869		3,198
		2024		2,600											
Lao PDR	Mix Milled rice quality 1	2023	456	525	542	467	488	660	414	387	248	397	288	355	436
		2024	477	412	474	382	535								
Malaysia	Not specified	2023	370	351	352	354	345	350	365	360	373	512	550	504	399
		2024	521	540	545	588									
Myanmar	Not specified	2023	416	424	427	455	487	495	508	511	542	573	570	562	498
		2024	573	582	588	595									
Thailand	Thailand Hommati Rice 100%	2023	878	842	830	845	862	867	878	928	887	855	845	870	866
		2024	880	872	854	852	899								
	White Rice 5%	2023	517	482	478	501	510	514	547	635	620	589	602	644	553
		2024	660	624	613	594	637								
Vietnam	Not specified	2023	519	535	529	523	539	551	549	593	624	640	667	688	580
		2024	707	663	631	619									

Table 15 CIF Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2023	491	510	510	556	558	559	568	572	601	640	647	638	571
		2024	636	653	656	647									
Lao PDR	Mix Milled rice quality 1	2023	106	130	117	448	410	493	502	503	485	282	347	229	338
		2024	492	246	382	393	340								
Malaysia	Not specified	2023	574	576	551	509	501	545	552	546	600	621	639	646	572
		2024	628	647	664	637									
Singapore	Not specified	2023	617	636	711	707	635	684	690	696	775	789	818	817	715
		2024	811	799	729	791	821	821	821	821	821	821	821	821	

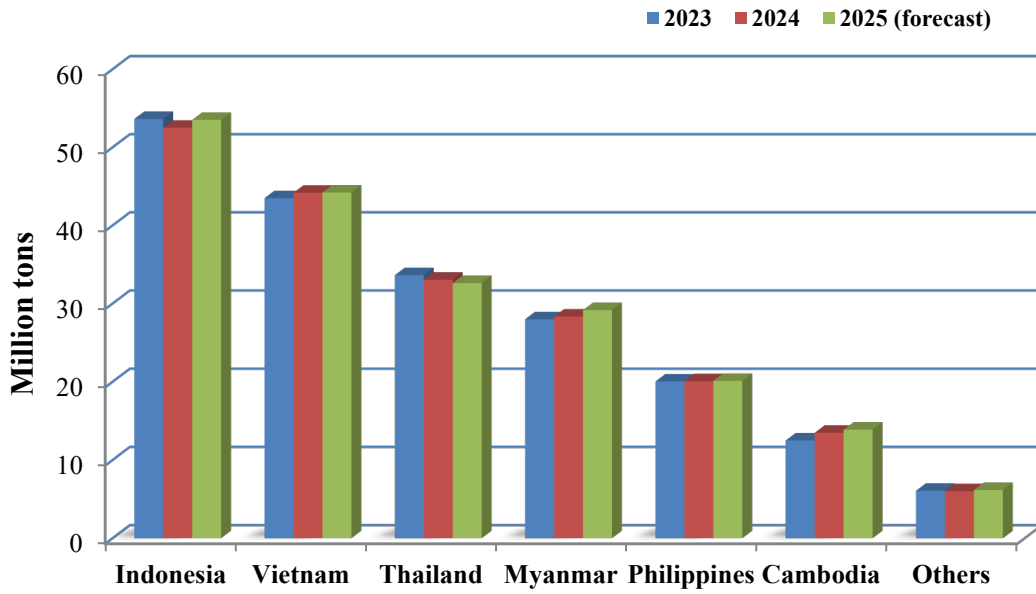


Figure 1 Paddy production of selected countries in ASEAN, 2023 – 2025

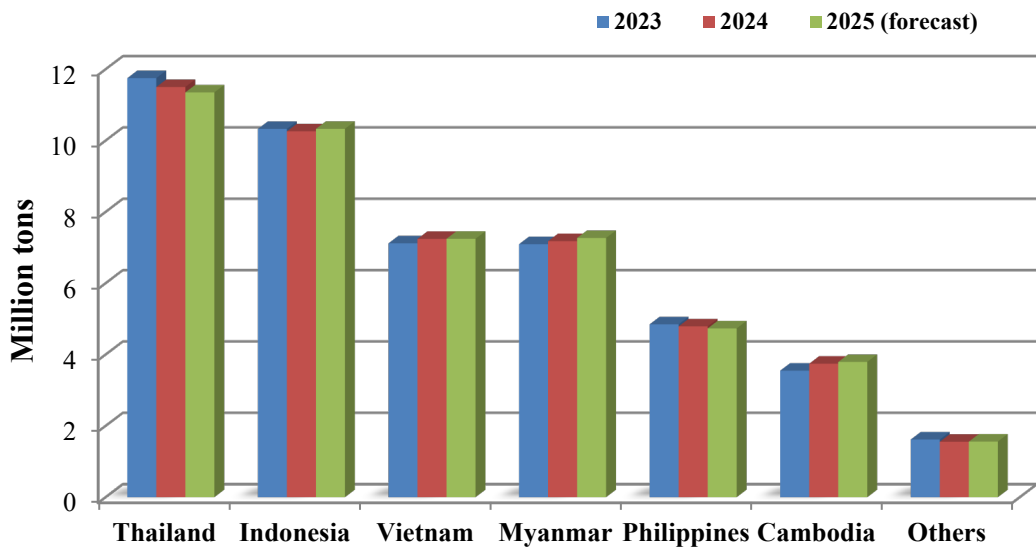


Figure 2 Paddy planted area of selected countries in ASEAN, 2023 – 2025

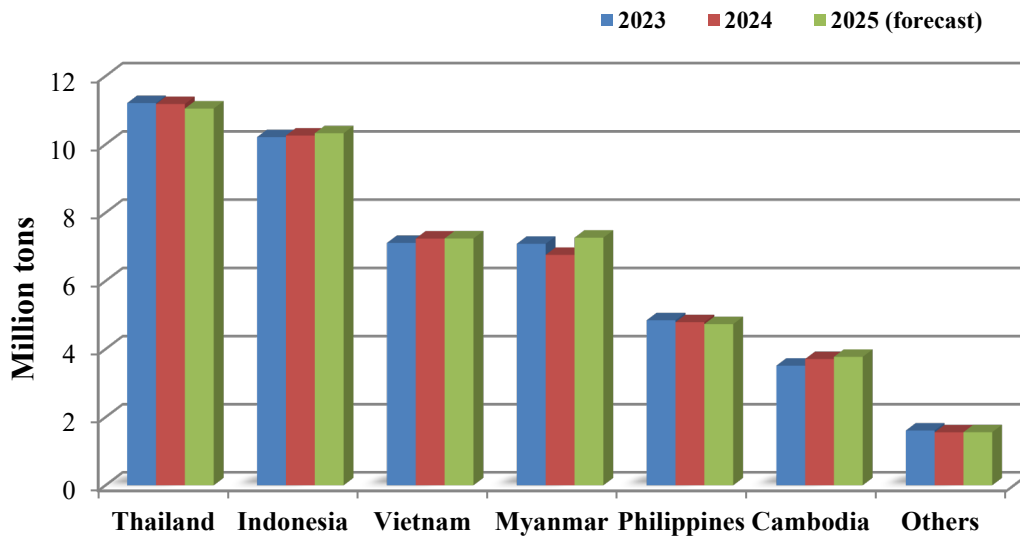


Figure 3 Paddy harvested area of selected countries in ASEAN, 2023 – 2025

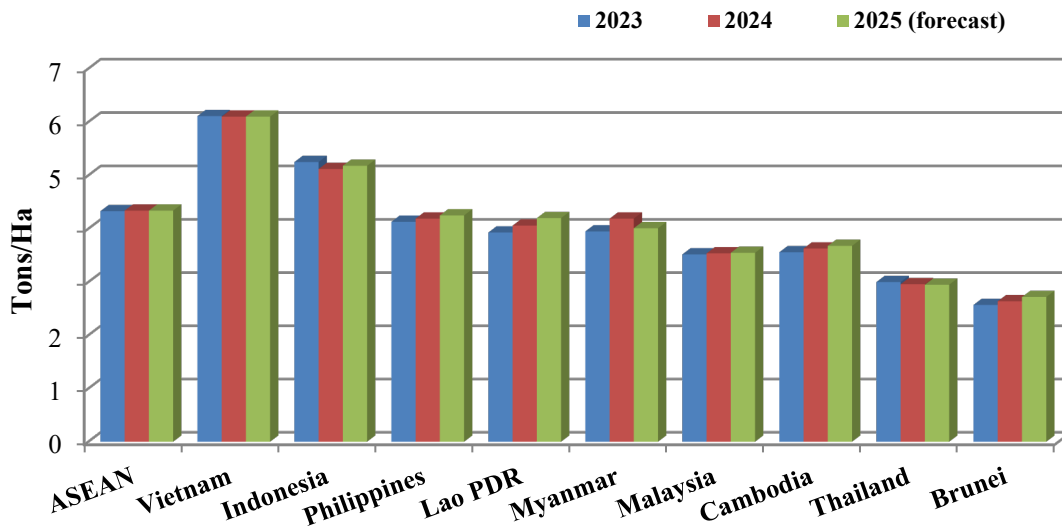


Figure 4 Paddy yield of selected countries in ASEAN, 2023 – 2025

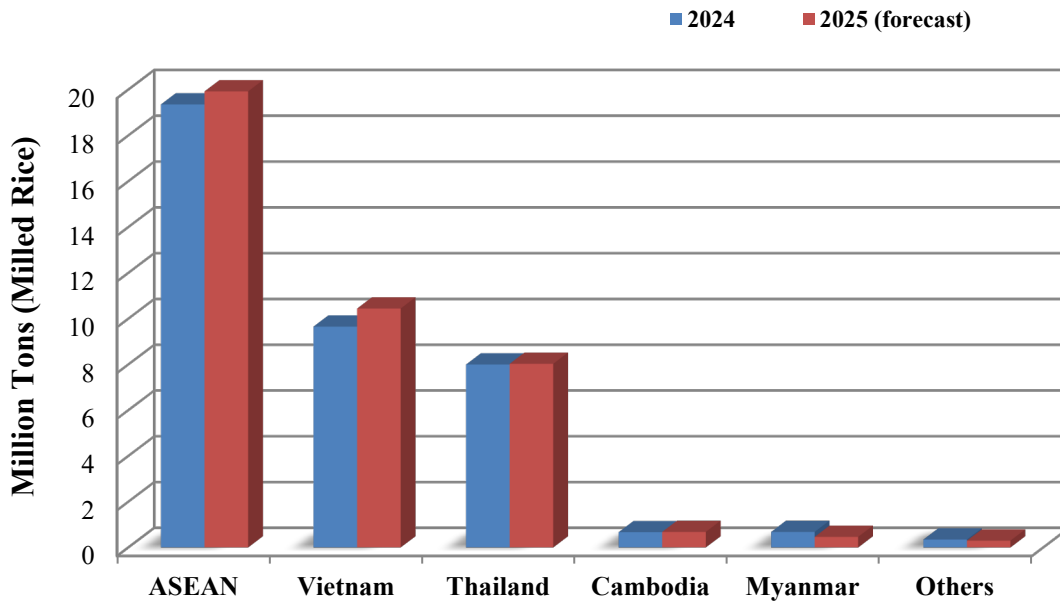
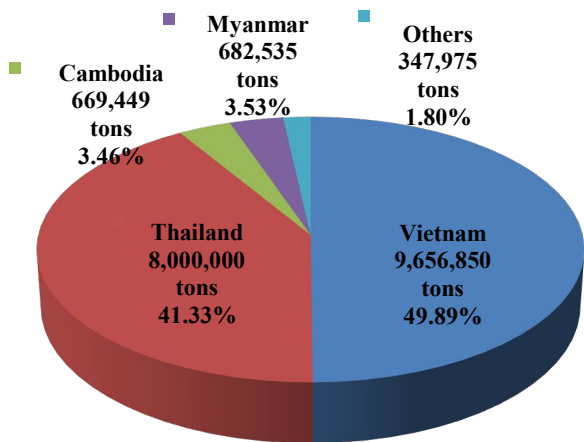
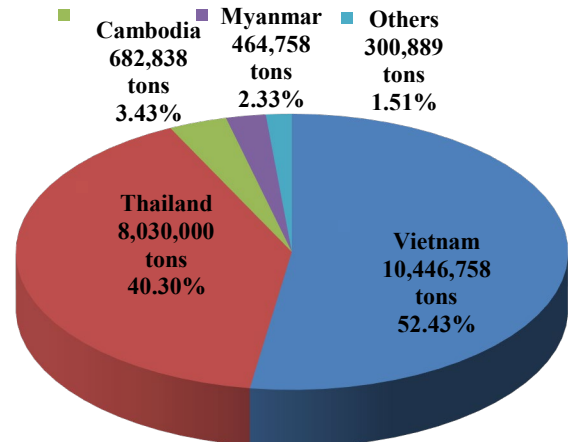


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 19.36 million tons

Figure 6 Share of rice export (tons) among ASEAN countries, 2024



Total 19.93 million tons

Figure 7 Share of rice export (tons) among ASEAN countries, 2025

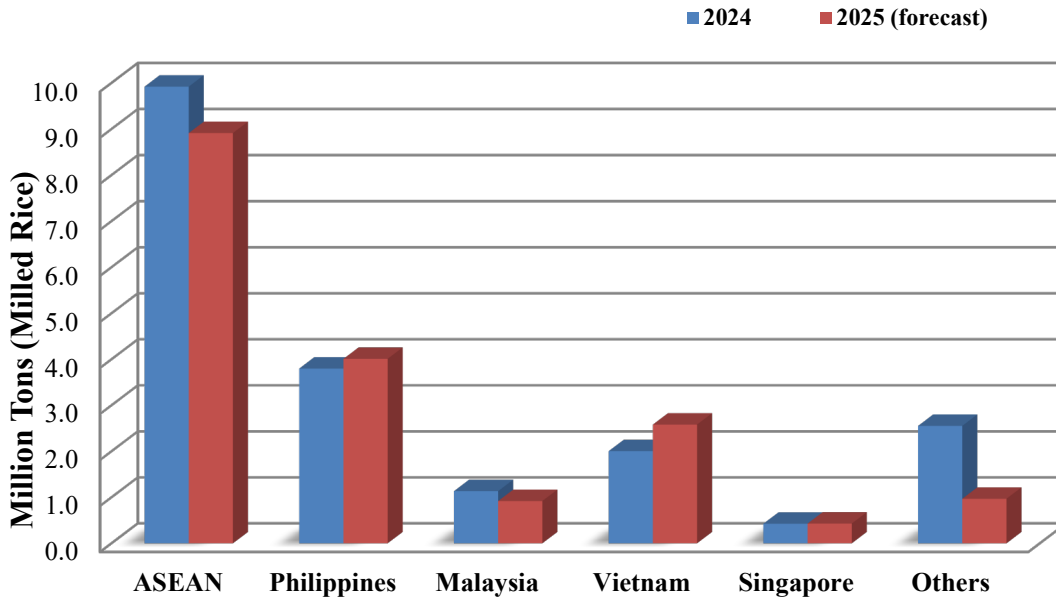
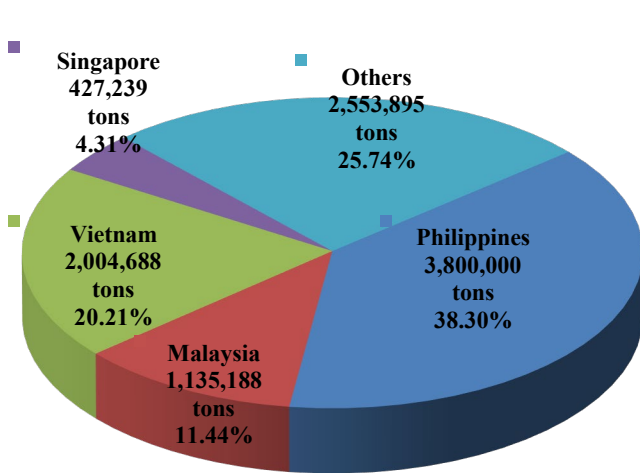
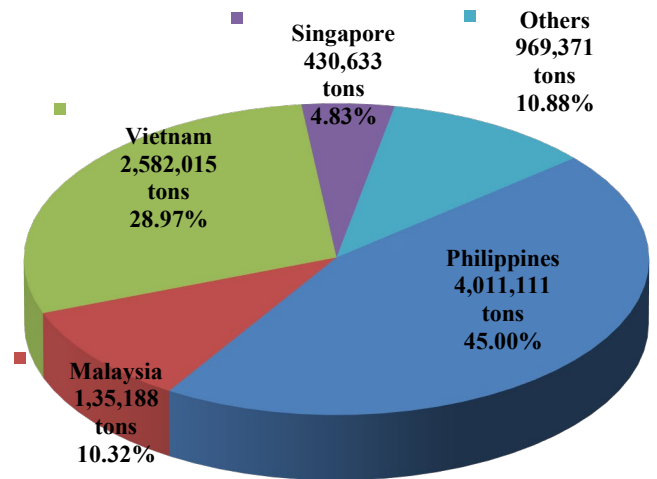


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 9.92 million tons

Figure 9 Share of rice import (tons) among ASEAN countries, 2024



Total 8.91 million tons

Figure 10 Share of rice import (tons) among ASEAN countries, 2025

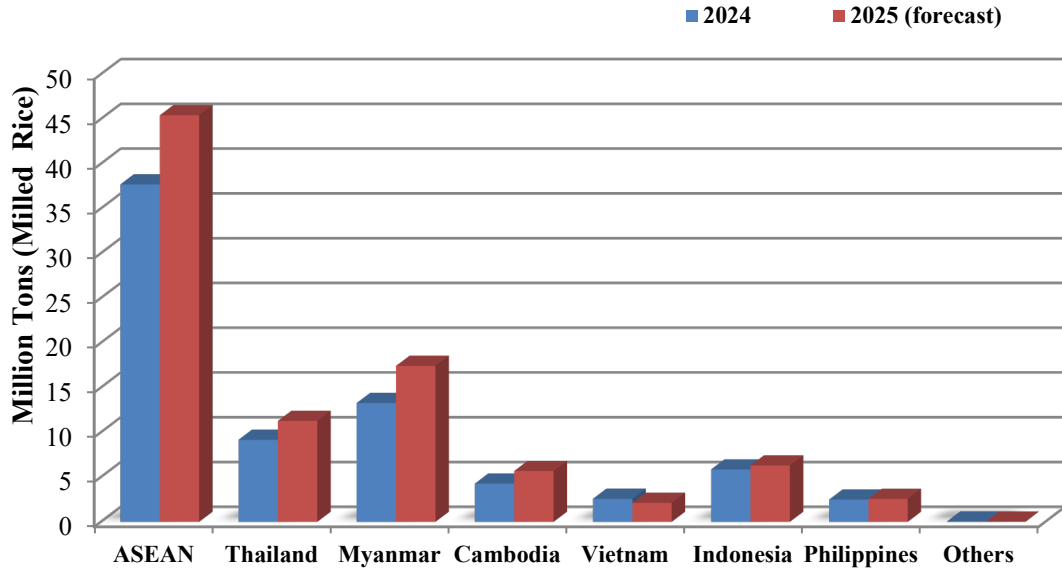


Figure 11 Amount of ending stock of rice in ASEAN countries, 2024– 2025

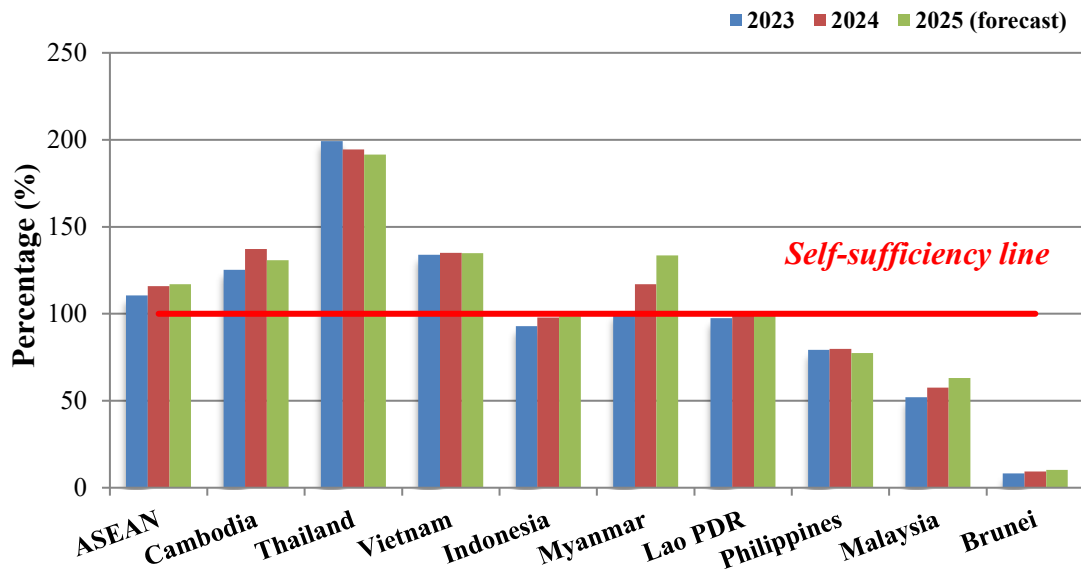


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2023– 2025

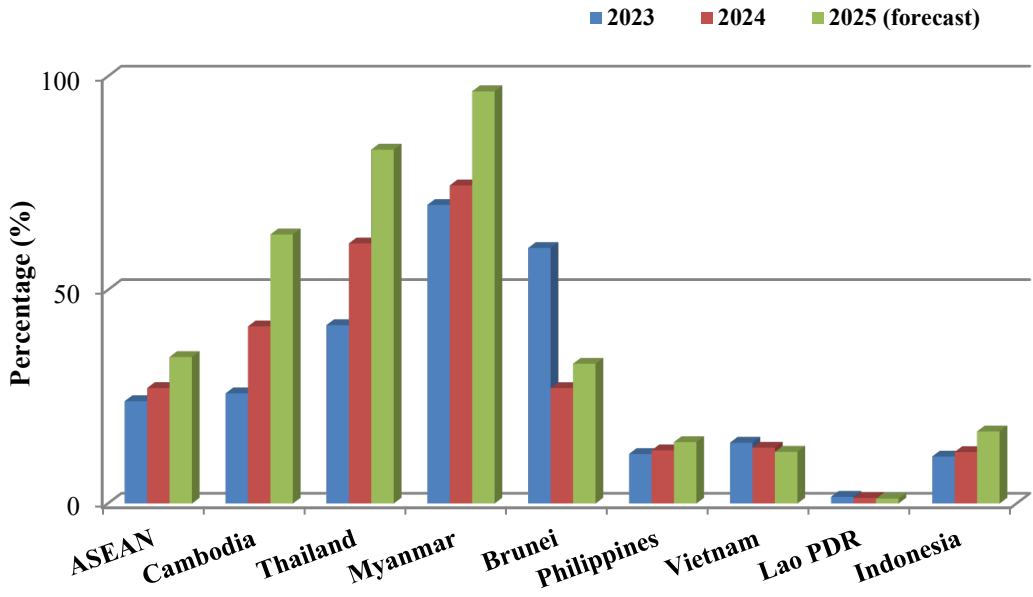


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

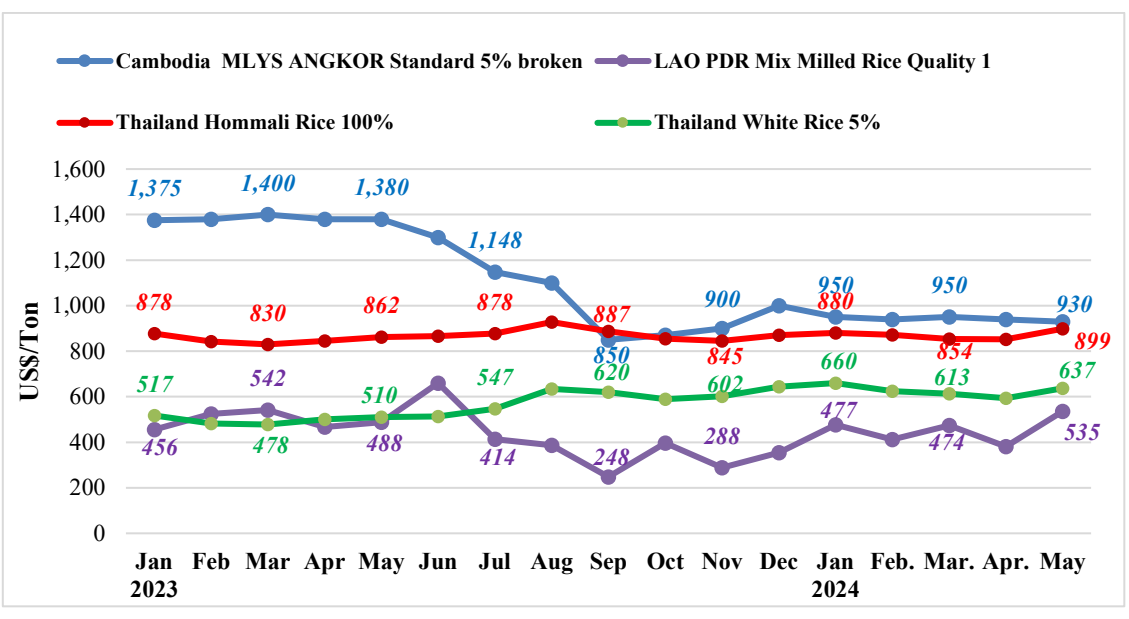


Figure 14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

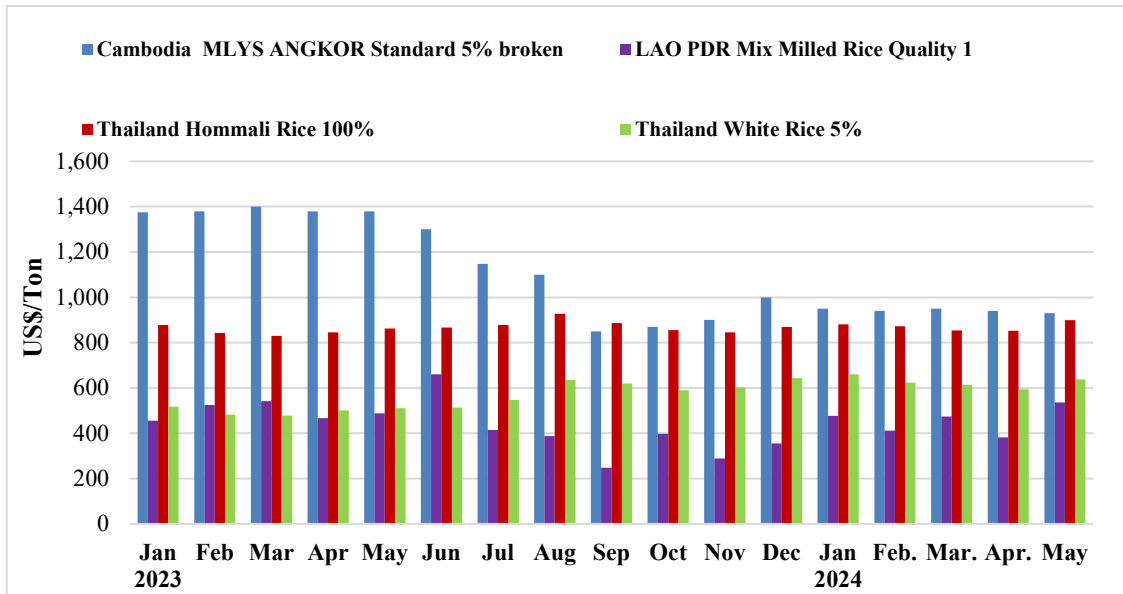


Figure 15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

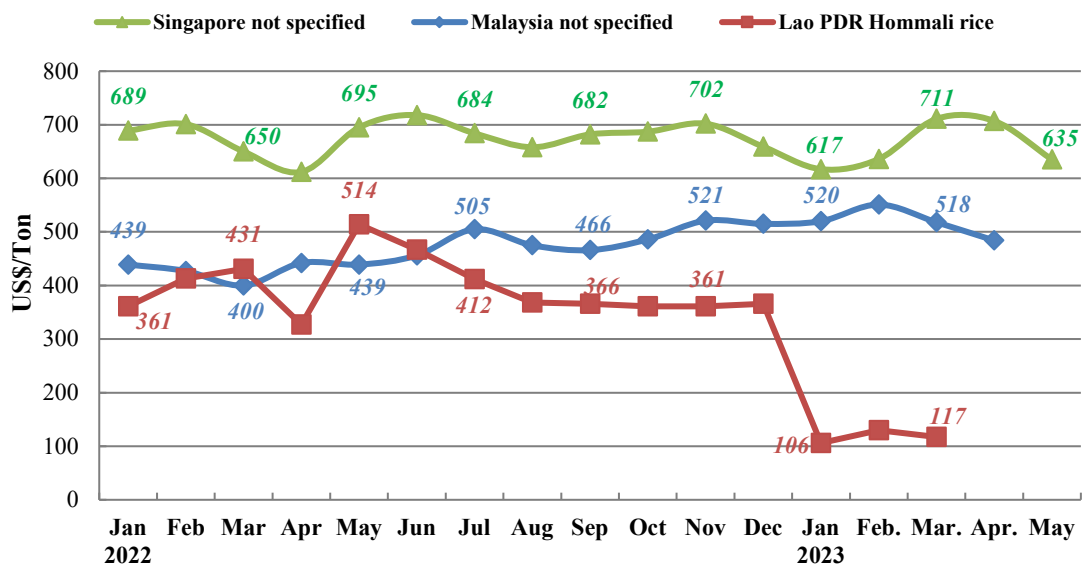


Figure 16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

Maize Outlook for 2025



The increase in ASEAN maize supply in 2025 is due to the increase in beginning stock, production, and imports. The supply is forecasted to increase by 3.16 million tons or 4.96 percent from 63.66 million tons in 2024 to approximately 66.82 million tons in 2025 (Table 16). The forecast indicates that the maize beginning stock is expected to increase by approximately 2.32 million tons or 43.94 percent from 5.28 million tons in 2024 to 7.60 million tons in 2025. The production of maize is forecasted to increase slightly by 0.36 million tons or 0.91 percent from 39.56 million tons in 2024 to 39.92 million tons in 2025. The import of maize is forecasted to increase by 0.48 million tons or 2.55 percent from 18.82 million tons in 2024 to 19.30 million tons in 2025.

The demand for maize in 2025 is expected to increase in domestic utilization and ending stock. Accordingly, domestic utilization is predicted to rise by 0.09 million tons or 0.17 percent from 54.08 million tons in 2024 to 54.17 million tons in 2025. The ending stock of maize is expected to increase by 3.56 million tons or 46.84 percent from 7.60 million tons in 2024 to 11.16 million tons in 2025. However, the maize exports are projected to decrease by 0.48 million tons or 24.24 percent from 1.98 million tons in 2024 to 1.50 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to slightly increase by 0.54 percent from 73.15 percent in 2024 to 73.69 percent in 2025.

The beginning stock to domestic utilization ratio, referred to as the food security ratio, is expected to increase by 4.27 percent from 9.77 percent in 2024 to 14.04 percent in 2025.

Table 16 Summary of the ASEAN maize situation, 2024 – 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	63.66	66.82	3.16	4.96
Beginning stock	5.28	7.60	2.32	43.94
Production	39.56	39.92	0.36	0.91
Import	18.82	19.30	0.48	2.55
Demand (Million tons)	63.66	66.82	3.16	4.96
Domestic utilization	54.08	54.17	0.09	0.17
Export	1.98	1.50	-0.48	-24.24
Ending stock	7.60	11.16	3.56	46.84
Ratio of production to domestic utilization (%)	73.15	73.69	0.54	-
Ratio of beginning stock to domestic utilization (%)	9.77	14.04	4.27	-

ASEAN Maize Situation in 2024

► *Production*

ASEAN maize production in 2024 (crop year 2023/24) is estimated at 45.32 million tons, an increase of 3.75 million tons or 9.02 percent from 41.57 million tons in 2023 (crop year 2022/23). The increase in maize production in 2024 was observed in Cambodia, Indonesia, Lao PDR, Myanmar, the Philippines, and Thailand due to the increase in planted area and yield. Meanwhile, Vietnam's production increased due to yield increase, despite a decline in planted area (Tables 17-20, Figures 17-20).

For **Brunei in 2024**, the increase of production was attributed to rise in yields. The increase in yield came from result of favorable weather, increased fertilizer application, and improved care practices.

For **Cambodia in 2024**, the increase in planted areas resulted from farmers responding to a price increase, an increasing export of processed agricultural products to 12 percents of all exports by industry policy, favorable weather, and a decrease in the price of competing crops. Meanwhile, the decrease in yield was a result of unfavorable weather conditions such as drought and plant diseases.

For **Indonesia in 2024**, the increase in production was attributed to an increase in both planted area and yield. The increase in planted area was influenced by farmers who responded to a price increase, favorable weather, and government policies with special assistance. Similarly, the increase in yield was also caused by favorable weather, farmers using more fertilizer and taking better care of their crops.

For **Lao PDR in 2024**, the increase in planted areas was a result of farmers responding to an increase in prices and government policy. Meanwhile, the decline in yield resulted from farmers using less fertilizer and an increase in the price of competing crops.

For **Myanmar in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to a price increase and favorable weather. Similarly, the increase in yield was influenced by farmers using more fertilizer and taking better care of their crops.

For **Thailand in 2024**, the increase in production was due to the increase in both planted area and yield. The increase in planted areas was attributed to favorable weather conditions, while the insufficient water in the reservoir for growing off-season rice led farmers to switch to growing maize, which requires less water.

For **Vietnam in 2024**, the decrease in planted areas resulted from an increase in the price of competing crops, while the increase in yield was due to farmers taking better care of their crops.

► *Utilization and Stock*

In 2024, maize utilization in ASEAN was estimated at 54.08 million tons, reflecting an increase of 1.17 million tons or 2.20 percent compared to 52.91 million tons in 2023 (Tables 22-23). The rise in domestic maize utilization was observed in Lao PDR, Malaysia, Myanmar, the Philippines, Thailand, and Vietnam, despite decreases in Brunei, Cambodia, Indonesia, and Singapore.

The beginning stock of maize in ASEAN in 2024 was estimated at 5.28 million tons, a decrease of 1.54 million tons or 22.85 percent from 6.82 million tons in 2023 (Tables 22-23).

The ratio of maize production to domestic utilization for the entire ASEAN region in 2024 was estimated at 73.15 percent, showing an increase from 69.05 percent in 2023 (Table 25, Figure 28).

This suggests that ASEAN as a whole produced less maize than required for regional consumption. On a country-by-country basis, Cambodia, Indonesia, Lao PDR, and Myanmar had ratios above 100 percent, indicating that they produced more maize than needed for their domestic consumption. On the other hand, Brunei, Malaysia, the Philippines, Thailand, and Vietnam had ratios below 100 percent, implying that these countries still needed to import maize to meet their domestic utilization needs.

The ratio of beginning stock to domestic utilization (**food security ratio**) for the ASEAN decreased to 9.77 percent in 2024 from 12.89 percent in 2023 (Table 26, Figure 29).

Maize production in ASEAN was increased, the maize crop is one of the most extensively cultivated cereal crops globally. This crop is vital for animal feed production. The significant decrease in global maize production output during the 2022/23 season created substantial supply and pricing issues for feed manufacturers. However, the 2023/24 season is anticipated to mark a period of recovery for maize production worldwide.

► *Trade*

In 2024, ASEAN exported 1.98 million tons of maize, while importing 18.82 million tons (Table 23, Figure 21-22, 24-25).

Myanmar, the largest exporter in ASEAN, was contributed 67.97 percent of the total maize exports, amounting to 1.34 million tons (Table 23, Figure 21-22).

The primary importing countries in the region include Vietnam, Thailand, Malaysia, Indonesia and Philippines (Table 23, Figure 24-25). The detailed information regarding the quantity and value of maize exported by destination countries and the quantity and value of maize imported by origin countries could found in Table 27-28.

► *Prices*

The monthly FOB prices for maize exporting countries and CIF prices for importing countries for 2023 and 2024 are shown in Tables 29-30 and Figures 30-31. Indonesia is the biggest importer of maize in ASEAN. The annual average FOB price for Indonesia in 2024 was \$794 per ton, an increase from \$555 per ton in 2023. The annual average CIF price for Indonesia in 2024 was \$274 per ton, a decrease from \$307 per ton in 2023

► *Damaged Area*

The damaged area of maize in 2024 is estimated to be 8,064 hectares. Of this, 2,923 hectares were caused by drought in Cambodia, followed by damage from pests, diseases, flooding, and other factors in Brunei and Myanmar. (Table 21).

Prospects for Maize in 2025

► *Production*

Maize production in ASEAN in 2025 (crop year 2024/25) is estimated at 45.59 million tons, up from 45.32 million tons in 2024. The increase is observed in all ASEAN countries except Indonesia and Lao PDR. The largest increase in terms of quantity was recorded in Myanmar, with production rising to approximately 2.90 million tons in 2025 from 2.60 million tons in 2024 (Table 17).

For **Brunei in 2025**, the increase of production is attributed to the rise in yields. The increase in yield was a result of favorable weather, increased fertilizer application, and improved care practices.

For **Indonesia in 2025**, the decrease in production is attributed to the reduction in planted area affected by unfavorable weather due to the El-Nino effect and competition with other food crops such as rice. Meanwhile, the increase in yield was caused by the use of more improved varieties, increased fertilizer application, and better crop care.

For **Lao PDR in 2025**, the decrease in production is attributed to the reduction in both planted area and yield due to farmers

using less fertilizer and an increase in the price of competing crops.

► *Utilization and Stock*

The domestic utilization of maize in ASEAN is forecasted to be 54.17 million tons in 2025, up from 54.08 million tons in 2024 (Table 23-24). The estimated beginning stock for 2025 is 7.60 million tons, which is an increase of 2.32 million tons from 5.28 million tons in 2024. The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase to 73.69 percent in 2025, up from 73.15 percent in 2024 (Table 25, Figure 28). Meanwhile, the ratio of beginning stock to domestic utilization (food security ratio) is expected to be 14.04 percent in 2025, an increase from 9.77 percent in 2024 (Table 26, Figure 29).

► *Trade*

The maize export from ASEAN is expected to decrease to 1.50 million tons in 2025, down from 1.98 million tons in 2024. The forecast for maize imports by ASEAN in 2025 is 19.30 million tons, an increase from 18.82 million tons in 2024 (Table 23-24, Figure 21, 23, 24, and 26).

Table 17 Maize production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	41,569.66	45,319.10	3,749.44	9.02	45,594.32	275.22	0.61
Brunei	0.56	0.59	0.03	4.97	0.62	0.03	5.00
Cambodia	1,512.97	1,578.18	65.21	4.31	1,646.20	68.02	4.31
Indonesia	19,561.13	22,426.90	2,865.77	14.65	22,088.71	-338.19	-1.51
Lao PDR	458.48	682.30	223.82	48.82	637.40	-44.90	-6.58
Malaysia	N/A						
Myanmar	2,341.12	2,596.62	255.50	10.91	*2,904.68	308.07	11.86
Philippines	8,322.27	*8,481.29	159.03	1.91	*8,643.36	162.07	1.91
Singapore	N/A						
Thailand	4,935.93	5,053.21	117.28	2.38	*5,173.33	120.13	2.38
Vietnam	4,437.20	4,500.00	62.80	1.42	4,500.00	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 18 Maize planted area in ASEAN countries, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	7,975.88	8,286.35	310.47	3.89	8,311.51	25.16	0.30
Brunei	N/A						
Cambodia	277.18	294.97	17.79	6.42	313.91	18.94	6.42
Indonesia	2,498.08	2,690.07	191.99	7.69	2,636.51	-53.55	-1.99
Lao PDR	96.04	143.50	47.46	49.42	138.72	-4.78	-3.33
Malaysia	N/A						
Myanmar	601.26	649.63	48.37	8.04	*704.48	54.85	8.44
Philippines	*2,537.61	*2,543.64	6.03	0.24	*2,549.69	6.04	0.24
Singapore	N/A						
Thailand	1,081.09	1,084.53	3.43	0.32	*1,088.18	3.66	0.34
Vietnam	884.61	880.00	-4.61	-0.52	880.00	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 19 Maize harvested area in ASEAN countries, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	7,933.01	8,263.15	330.14	4.16	8,292.80	29.65	0.36
Brunei	N/A						
Cambodia	269.31	287.73	18.42	6.84	307.41	19.68	6.84
Indonesia	2,487.19	2,690.07	202.88	8.16	2,636.51	-53.55	-1.99
Lao PDR	96.04	143.50	47.46	49.42	138.72	-4.78	-3.33
Malaysia	N/A						
Myanmar	600.42	648.91	48.49	8.08	*703.9	54.99	8.47
Philippines	*2,537.61	*2,543.64	6.03	0.24	*2,549.69	6.04	0.24
Singapore	N/A						
Thailand	1,062.22	1,069.29	7.07	0.67	*1,076.55	7.27	0.68
Vietnam	880.20	880.00	-0.20	-0.02	880.00	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 20 Maize yield in ASEAN countries, 2023 – 2025

Unit: Tons/Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
			ASEAN	5.24		5.48	0.24
Brunei	N/A						
Cambodia	5.62	5.48	-0.14	-2.49	5.35	-0.13	-2.37
Indonesia	7.86	8.34	0.48	6.11	8.38	0.04	0.48
Lao PDR	4.77	4.75	-0.02	-0.42	4.59	-0.16	-3.37
Malaysia	N/A						
Myanmar	3.90	4.00	0.10	2.56	*4.13	0.13	3.25
Philippines	*3.28	*3.33	0.05	1.52	*3.39	0.06	1.80
Singapore	N/A						
Thailand	4.65	4.73	0.08	1.72	*4.81	0.08	1.69
Vietnam	5.04	5.11	0.07	1.39	5.11	0.00	0.00

Remark: N/A refers to data that is not available.**Table 21 Maize damaged area in ASEAN by cause of damage, 2024**

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	711	2,923	2,220	1,621	-	589	8,064
Brunei	24	27	27	28	-	-	106
Cambodia	-	2,897	2,173	1,593	-	579	7,242
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	687	-	20	-	-	9	716
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: N/A refers to data that is not available.

Table 22 Maize balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	6,822,860	36,536,286	17,245,141	60,604,287	52,913,772	2,405,790	5,284,725	60,604,287
Brunei	17,798	2,422	17,179	37,399	29,751	-	7,648	37,399
Cambodia	*470,289	1,512,970		1,983,259	872,255	71,548	1,039,456	1,983,259
Indonesia	2,770,423	14,445,893	1,227,406	18,443,722	17,395,341	92,052	956,330	18,443,722
Lao PDR	44,105	458,483	1,812	504,400	350,382	57,941	96,077	504,400
Malaysia	-	*80,000	*1,780,000	1,860,000	*1,858,064	*1,936	-	1,860,000
Myanmar	2,148,550	2,341,120	5,617	4,495,287	1,211,362	1,817,214	1,466,711	4,495,287
Philippines	*400,000	*8,322,271	*1,000,000	9,722,271	*8,700,000	-	1,022,271	9,722,271
Singapore	-	-	1,603	1,603	1,514	89	-	1,603
Thailand	149,246	4,935,926	*3,500,000	8,585,172	8,440,000	*1,500	143,672	8,585,172
Vietnam	822,448	4,437,200	9,711,524	14,971,172	14,055,103	363,509	552,560	14,971,172

Remark: * The value is estimated by AFSIS Secretariat.

Table 23 Maize balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,284,725	39,556,492	18,821,575	63,662,792	54,079,529	1,978,616	7,604,647	63,662,792
Brunei	7,648	2,620	27,149	37,417	28,321	-	9,096	37,417
Cambodia	1,039,456	1,578,179		2,617,635	787,581	80,134	1,749,919	2,617,635
Indonesia	956,330	16,562,267	1,485,164	19,003,762	16,099,863	54,748	2,849,150	19,003,762
Lao PDR	96,077	682,300	8,533	786,911	561,412	153,921	71,577	786,911
Malaysia	-	*100,000	*1,770,000	1,870,000	*1,868,560	*1,439	-	1,870,000
Myanmar	1,466,711	2,596,618	2,286	4,065,615	1,485,246	1,344,913	1,235,456	4,065,615
Philippines	1,022,271	*8,481,299	*1,000,000	10,503,571	*9,500,000	-	1,003,571	10,503,571
Singapore	-	-	1,311	1,311	1,220	91	-	1,311
Thailand	143,672	5,053,208	*4,000,000	9,196,880	8,910,000	*1,000	285,880	9,196,880
Vietnam	552,560	4,500,000	10,527,131	15,579,691	14,837,326	342,369	399,996	15,579,691

Remark: * The value is estimated by AFSIS Secretariat.

Table 24 Maize balance sheet of ASEAN countries, 2025

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,604,647	39,920,337	19,297,901	66,822,886	54,170,278	1,495,220	11,157,388	66,822,886
Brunei	9,096	2,833	25,325	37,255	27,813	-	9,442	37,255
Cambodia	1,749,919	1,646,199		3,396,118	798,343	89,750	2,508,025	3,396,118
Indonesia	2,849,150	16,312,514	1,098,897	20,260,561	15,049,316	85,487	5,125,757	20,260,561
Lao PDR	71,577	637,400		708,977	465,444	-	243,533	708,977
Malaysia	-	*100,000	*1,760,056	1,860,056	*1,858,986	*1,070	-	1,860,056
Myanmar	1,235,456	2,904,686	*930	4,141,073	*1,836,118	*995,364	1,309,590	4,141,073
Philippines	1,003,571	*864,3367	*1,000,000	10,646,939	*9,500,000	-	1,146,939	10,646,939
Singapore	-		1,457	1,457	1,367	90	-	1,457
Thailand	285,880	*5,173,338	*4,000,000	9,459,218	*8,910,000	*1,000	548,218	9,459,218
Vietnam	399,996	4,500,000	11,411,235	16,311,232	15,722,891	322,457	265,884	16,311,232

Remark: * The value is estimated by AFSIS Secretariat.

Table 25 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	36,536,286	52,913,772	69.05	39,556,492	54,079,529	73.15	39,920,337	54,170,278	73.69
Brunei	2,422	29,751	8.14	2,620	28,321	9.25	2,833	27,813	10.19
Cambodia	1,512,970	872,255	173.46	1,578,179	787,581	200.38	1,646,199	798,343	206.20
Indonesia	14,445,893	17,395,341	83.04	16,562,267	16,099,863	102.87	16,312,514	15,049,316	108.39
Lao PDR	458,483	350,382	130.85	682,300	561,412	121.53	637,400	465,444	136.94
Malaysia	80,000	1,858,064	4.31	100,000	1,868,560	5.35	100,000	1,858,986	5.38
Myanmar	2,341,120	1,211,362	193.26	2,596,618	1,485,246	174.83	2,904,686	1,836,118	158.20
Philippines	8,322,271	8,700,000	95.66	8,481,300	9,500,000	89.28	8,643,368	9,500,000	90.98
Singapore	-	1,514	-	-	1,220	-	-	1,367	0.00
Thailand	4,935,926	8,440,000	58.48	5,053,208	8,910,000	56.71	5,173,338	8,910,000	58.06
Vietnam	4,437,200	14,055,103	31.57	4,500,000	14,837,326	30.33	4,500,000	15,722,891	28.62

Remark: * The value is estimated by AFSIS Secretariat, N/A refers to data that is not available.

Table 26 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	6,822,860	52,913,772	12.89	5,284,725	54,079,529	9.77	7,604,647	54,170,278	14.04
Brunei	17,798	29,751	59.82	7,648	28,321	27.00	9,096	27,813	32.70
Cambodia	470,289	872,255	53.92	1,039,456	787,581	131.98	1,749,919	798,343	219.19
Indonesia	2,770,423	17,395,341	15.93	956,330	16,099,863	5.94	2,849,150	15,049,316	18.93
Lao PDR	44,105	350,382	12.59	96,077	561,412	17.11	71,577	465,444	15.38
Malaysia	-	1,858,064	-	-	1,868,560	-	-	1,858,986	-
Myanmar	2,148,550	1,211,362	177.37	1,466,711	1,485,246	98.75	1,235,456	1,836,118	67.29
Philippines	400,000	8,700,000	4.60	1,022,271	9,500,000	10.76	1,003,571	9,500,000	10.56
Singapore	-	1,514	-	-	1,220	-	-	1,367	-
Thailand	149,246	8,440,000	1.77	143,672	8,910,000	1.61	285,880	8,910,000	3.21
Vietnam	822,448	14,055,103	5.85	552,560	14,837,326	3.72	399,996	15,722,891	2.54

Remark: * The value is estimated by AFSIS Secretariat, N/A refers to data that is not available.

Table 27 Quantity and Value of Maize Export by Countries of Destination in 2024

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia														
Indonesia									83	108,421			0.0026	27
Lao PDR														
Malaysia	0.77	996	1.25	1,088	1,302	388,893					0.002	10		
Myanmar									250	60,000			362,791	84,084,000
Philippines	N/A													
Singapore	N/A													
Thailand	N/A													
Vietnam				2,421,172		6,820,000		1,706,502						17,179,910

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia			37,500	11,400,000	32,755	9,957,520	70,255	21,357,520	1,293	393,196	71,548	21,750,716
Indonesia	92	85,119	0.02	255	0.20	435	175	194,257	56	23,132	231	217,389
Lao PDR			69,391	9,699,225	64,252	14,553,187	133,643	24,252,412	20,278	6,893,950	153,921	31,146,362
Malaysia	41	27,553	47	12,595			1,391	431,135	49	41,376	1,440	472,511
Myanmar	142	33,000	776,680	184,304,000			1,139,863	268,481,000	205,050	46,749,000	1,344,913	315,230,000
Philippines	N/A											
Singapore	N/A											
Thailand	N/A											
Vietnam		2,476,621					-	30,604,205	-	1,615,487	-	32,219,692

Remark: The data in this table is obtained from national focal points of member states and may not complete, N/A refers to data that is not available.

Table 28 Quantity and Value of Maize Import by Countries of Origin in 2024

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									0.0020	3.00			0.20	2,333
Lao PDR														
Malaysia					7.30	14,294								
Myanmar														
Philippines	N/A													
Singapore					349	301,588			314	301,705	60.00	15,341	2.40	877
Thailand			4,000	1,050,101			149,587	36,411,230			664,155	177,849,588		
Vietnam								18,555,760						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.0030	56	181	638,260			181	640,652	660,614	178,835,061	660,795	179,475,713
Lao PDR			571	169,402	623	269,569	1,194	438,971	7,339	2,114,142	8,533	2,553,113
Malaysia	1.25	2,453	172	548,612			181	565,359	476,974	122,892,987	477,155	123,458,346
Myanmar			1,246	5,186,000			1,246	5,186,000	1,040	4,108,000	2,286	9,294,000
Philippines	N/A											
Singapore			25	43,995	0.28	987	751	664,493	696	1,289,734	1,447	1,954,227
Thailand							817,742	215,310,920			817,742	215,310,920
Vietnam				7,467,512			-	26,023,272	-	845,069,990	-	871,093,262

Remark: The data in this table is obtained from national focal points of member states and may not complete, N/A refers to data that is not available.

Table 29 FOB Price of maize (Feed grain) in selected ASEAN countries

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2023	300	300	304	304	300	310	310	302	305	305	304	304	304
	2024	305	305	304	304	304								304
Indonesia	2023	305	308	326	338	686	733	835	843	841	614	429	400	555
	2024	829	500	677	1,168									794
Lao PDR	2023	125	152	182	147	123	128	121	144	120	250	283	319	174
	2024	283	180	173	201	179								203
Malaysia	2023	977	370	456	746	905	386	841	701	340	343	331	316	559
	2024	305	974	411	415									526
Myanmar	2023	302	319	319	310	309	308	297	288	277	264	248	250	291
	2024	245	241	230	225									236
Thailand	2023	407	403	375	381	380	367	347	338	318	301	289	299	350
	2024	299	294	291	281	296								292

Table 30 CIF Price of maize (Feed grain) in selected ASEAN countries

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2023	337	348	347	336	343	341	303	297	260	258	258	263	307
	2024	271	290	275	260									274
Lao PDR	2023	1,794	2,096	1,839	2,175	1,335	3,014	229	311	400	284	321	2,656	1,371
	2024	298	321	384	313	500								363
Malaysia	2023	348	329	349	324	326	336	341	275	314	248	277	255	310
	2024	255	262	279	254									262
Myanmar	2023	4,100	3,931	3,970	4,006	3,736	3,855		7,963	4,507	7,458	3,914	4,118	4,687
	2024		4,590	3,021	3,778									3,796
Singapore	2023	1,236	1,480	1,023	1,243	1,426	1,180	1,580	1,110	963	2,409	1,233	1,285	1,347
	2024	1,469	1,130	1,222	1,281	912	894	894	894	894	894	894	894	1,023
Vietnam	2023	335	338	340	338	329	310	296	289	274	266	261	257	303
	2024	255	255	248	254									253

Remark: The data in this table is obtained from national focal points of member states and may not complete, N/A refers to data that is not available.

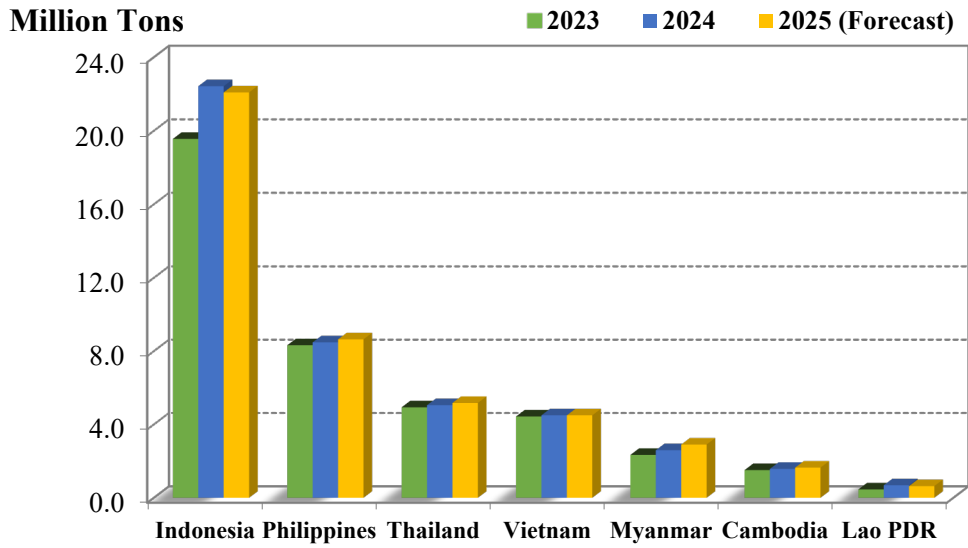


Figure 17 Maize production of selected countries in ASEAN, 2023 – 2025

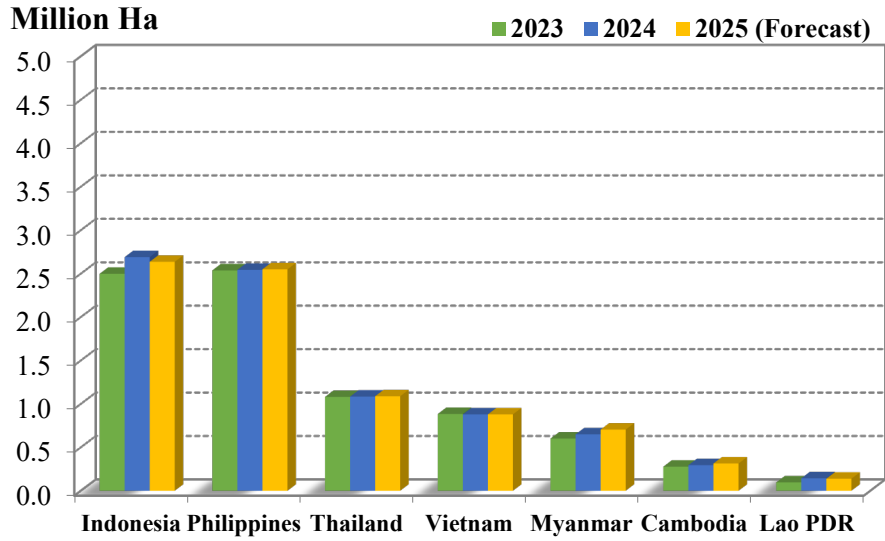


Figure 18 Maize planted area of selected countries in ASEAN, 2023 – 2025

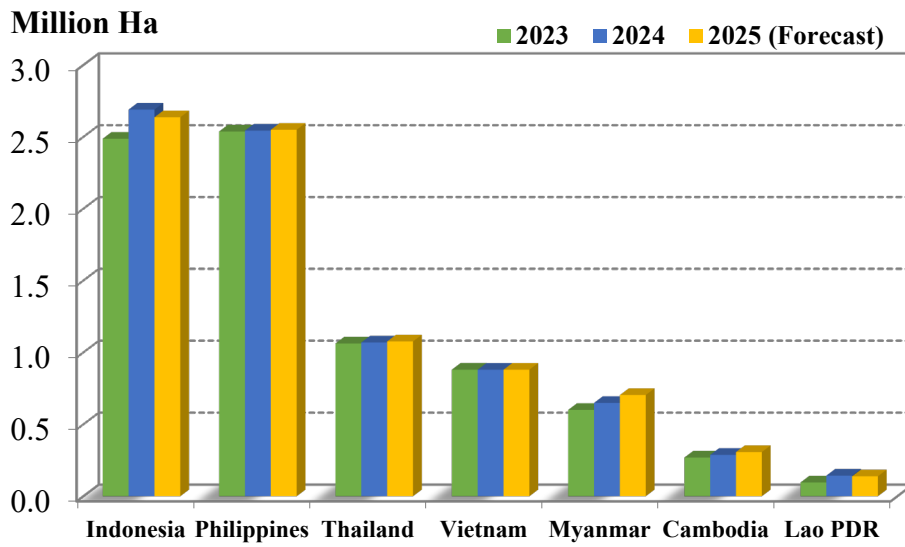


Figure 19 Maize harvested area of selected countries in ASEAN, 2023 – 2025

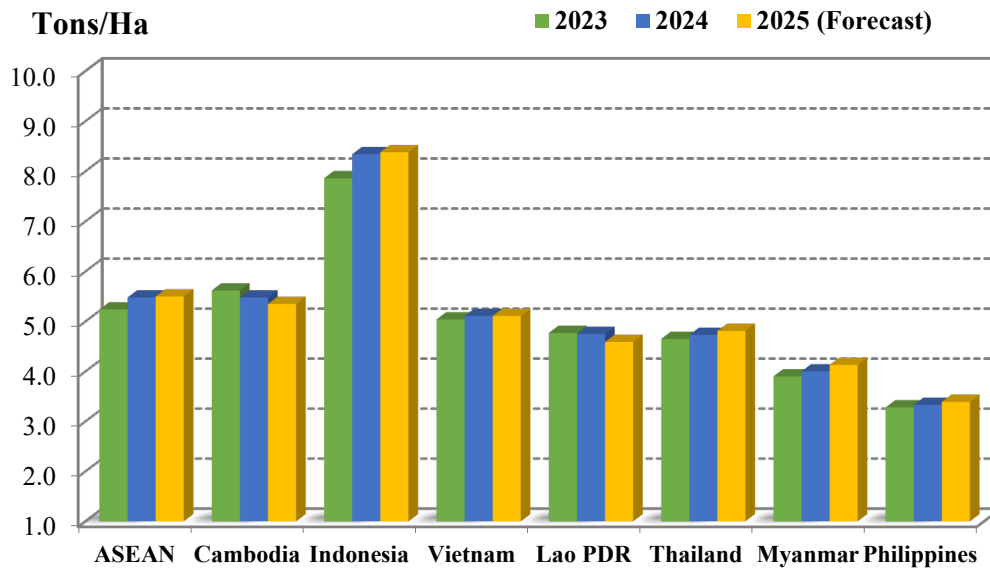


Figure 20 Maize yield of countries in ASEAN, 2023 – 2025

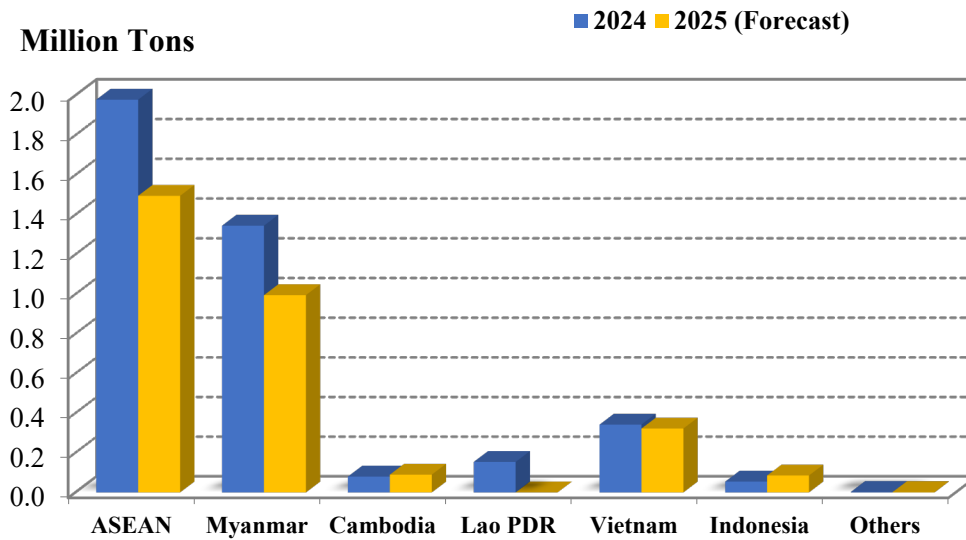
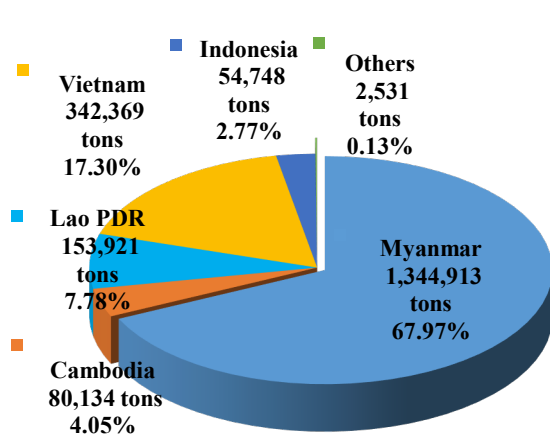
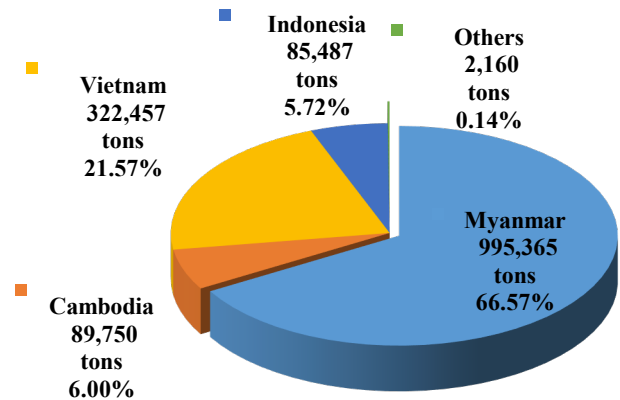


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 1.98 million tons

Figure 22 Share of maize export (tons) among ASEAN countries, 2024



Total 1.50 million tons

Figure 23 Share of maize export (tons) among ASEAN countries, 2025

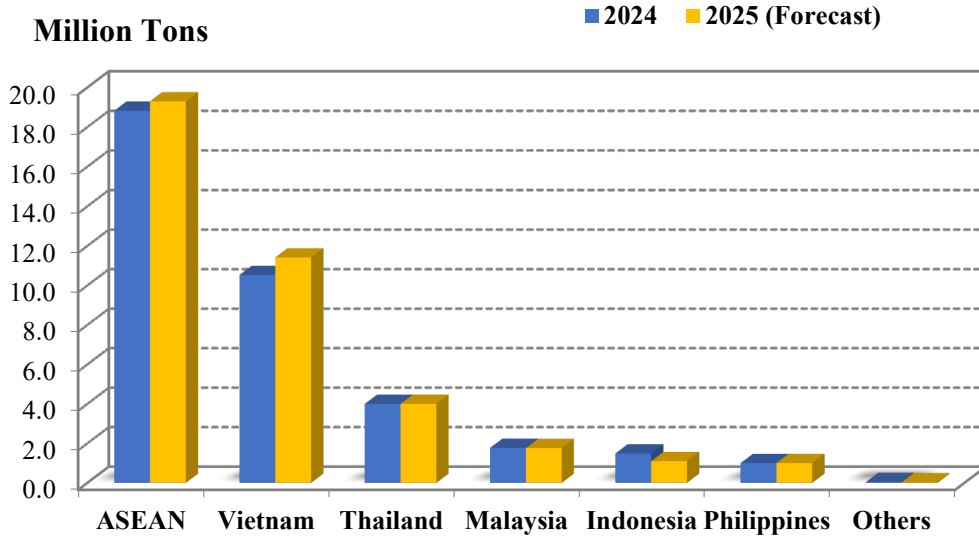
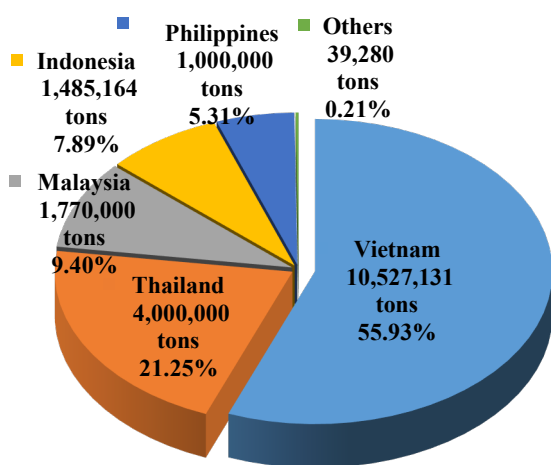
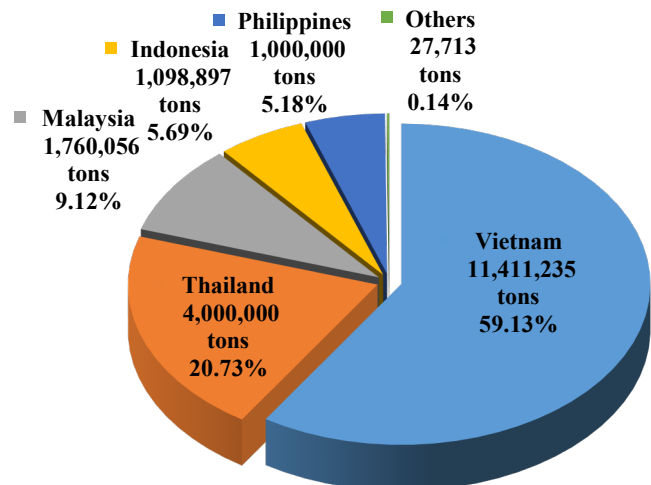


Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 18.82 million tons

Figure 25 Share of maize import (tons) among ASEAN countries, 2024



Total 19.30 million tons

Figure 26 Share of maize import (tons) among ASEAN countries, 2025

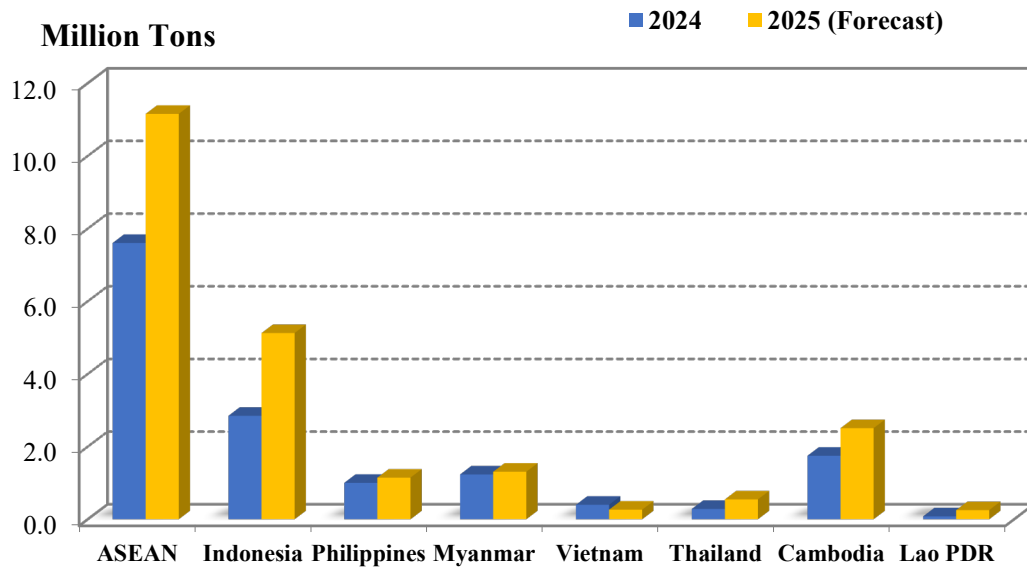


Figure 27 Amount of ending stock of maize in ASEAN countries in 2024 – 2025

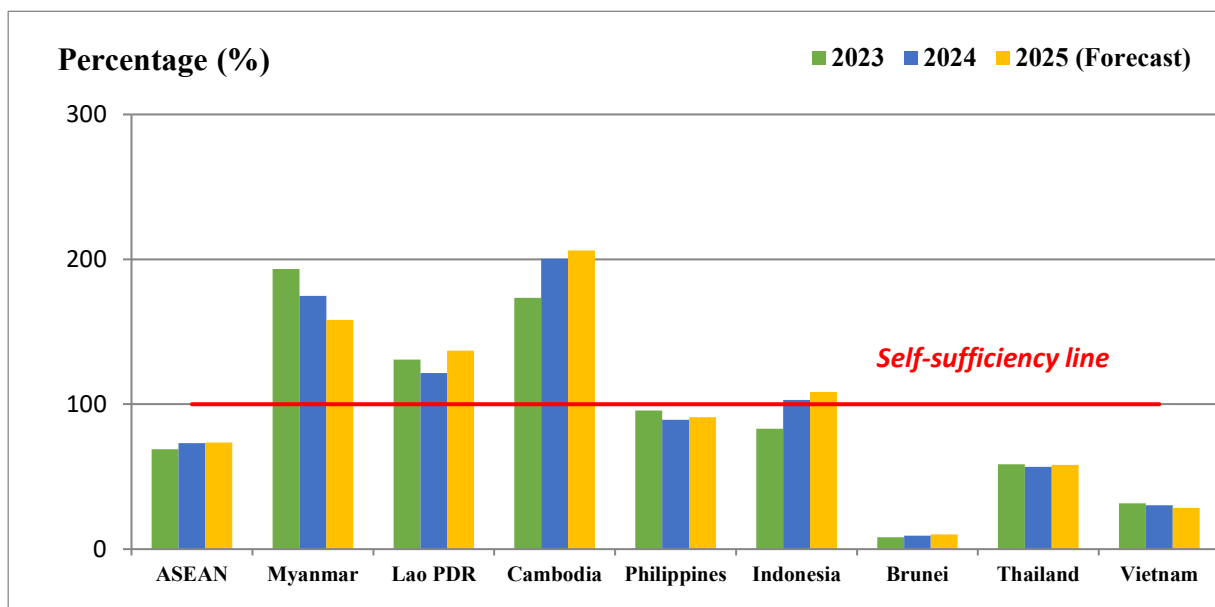


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2024 – 2025

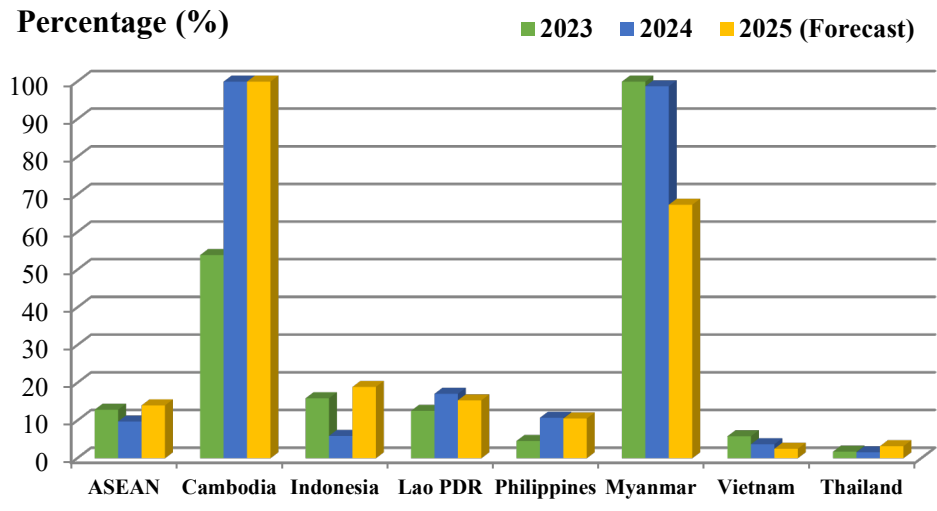


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

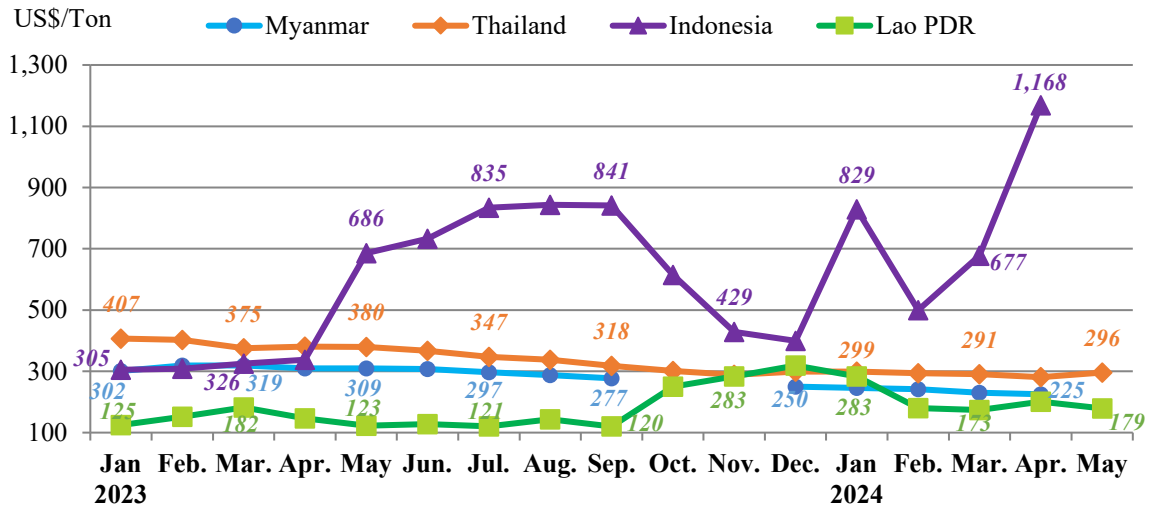


Figure 30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2023 – 2024

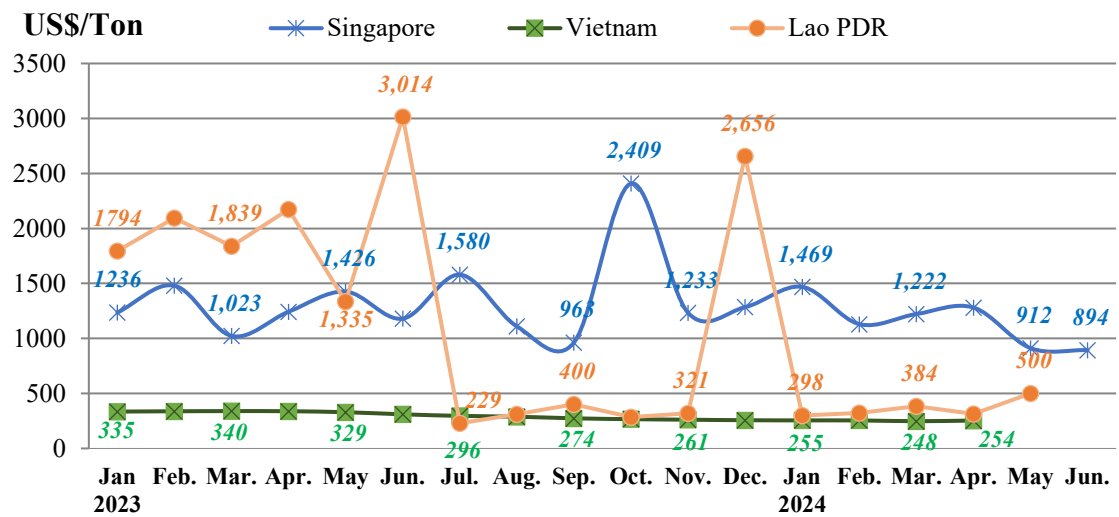


Figure 31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2023 – 2024

Sugar Outlook for 2025



ASEAN sugar supply is forecast to decrease by approximately 0.98 million tons or 2.51 percent from 39.05 million tons in 2024 to 38.07 million tons in 2025, despite the increase in beginning stock. (Table 31).

The beginning stock of sugar is forecast to increase by 0.21 million tons or 1.45 percent from 14.44 million tons in 2024 to 14.65 million tons in 2025. The sugar production in is forecast to decrease by 1.15 million tons or 7.27 percent from 15.81 million tons in 2024 to 14.66 million tons in 2025. The sugar imports in 2025 is forecast to decrease by approximately 0.04 million tons or 0.45 percent from 8.80 million tons in 2024 to 8.76 million tons in 2025.

ASEAN sugar demand is forecasted to decrease by domestic utilization, export and ending stock. The domestic utilization is forecasted to decrease by 0.44 million tons or 2.59 percent from 16.96 million tons in 2024 to 16.52 million tons in 2025. The export of sugar from ASEAN in 2025 is expected to reduce by 0.04 million tons or 0.54 percent from 7.44 million tons in 2024 or 7.40 million tons 2025. The ending stock is forecasted to drop by 0.50 million tons or 3.41 percent from 14.65 million tons in 2024 to 14.15 million tons in 2025.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2025 is forecasted to be 88.76 percent, which decreases from 93.21 percent in 2024.

The beginning stock to domestic utilization ratio (food security ratio) in 2025 is forecasted to be 88.69 percent, which increases from 85.15 percent in 2024.

Table 31 Summary of the ASEAN sugar situation, 2024 – 2025

Unit: Million Tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	39.05	38.07	-0.98	-2.51
Beginning stock	14.44	14.65	0.21	1.45
Production	15.81	14.66	-1.15	-7.27
Import	8.80	8.76	-0.04	-0.45
Demand (Million tons)	39.05	38.07	-0.98	-2.51
Domestic utilization	16.96	16.52	-0.44	-2.59
Export	7.44	7.40	-0.04	-0.54
Ending stock	14.65	14.15	-0.50	-3.41
Ratio of production to domestic utilization (%)	93.21	88.76	-4.45	-
Ratio of beginning stock to domestic utilization (%)	85.15	88.69	3.54	-

ASEAN Sugar Situation in 2024

► *Production*

Sugarcane production in ASEAN in 2024 (2023/24 crop year) was estimated at 162.71 million tons, a decrease of 7.67 million tons or 4.50 percent from 170.38 million tons in 2023 (Table 32, Figure 32). The countries that experienced a decrease in production were Lao PDR, Philippines, and Thailand. However, production increased in Brunei, Cambodia, Indonesia, Myanmar, and Vietnam due to increases in planted area and yield.

For **Brunei in 2024**, the increase of production was attributed to rise in yields. The increase in yield came from result of favorable weather, increased fertilizer application, and better farmer cared.

For **Cambodia in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted areas resulted from farmers responding to a price increase and an increasing export of processed agricultural products to 12 percents of all exports by industry policy. Similarly, the increase in yield was a result of farmers using more improved varieties, increasing fertilizer application and taking good care of their crops.

For **Indonesia in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to price increases and government policy. Furthermore, the increase in yield was also caused by favorable weather conditions.

For **Lao PDR in 2024**, the decrease in production was attributed to a reduction in both planted area and yield. The decrease in planted areas was driven by farmers responding to price decreases and government policy. Besides, the decrease in yield was influenced by farmers applying less fertilizer.

For **Myanmar in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to a price increase. Besides, the increase in yield was influenced by farmers using more fertilizer and employing improved varieties.

For **Thailand in 2024**, the decrease in production was due to the decrease in both planted area and yield. The decrease in planted areas was attributed to drought conditions and high production costs. Moreover, the decrease in yield was attributed to unsuitable weather conditions, specifically drought.

For **Vietnam in 2024**, the increase in planted areas resulted from higher demand from domestic and external markets.

► *Utilization and Stock*

The domestic utilization of sugar in ASEAN increased by 0.94 million tons or 5.85 percent from 16.02 million tons in 2023 to 16.96 million tons in 2025 (Table 37-38). The beginning stock of sugar in ASEAN increased by 3.23 million tons or 28.77 percent from 11.21 million tons in 2023 to 14.44 million tons in 2025. The ending stock of sugar in ASEAN increased by 0.21 million tons or 1.43 percent from 14.44 million tons in 2023 to 14.65 million tons in 2025.

The ratio of sugar production to domestic utilization (self-sufficiency ratio) increased to 93.21 percent in 2024, compared to 110.68 percent in 2023. This indicates that ASEAN produced adequate sugar for regional consumption (Table 40, Figure 43). Moreover, on a country-by-country basis, sugar production in Cambodia, Myanmar, Lao PDR, Vietnam and Thailand, exceeded the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (food security ratio) was estimated to be 85.15 percent in 2024, compared to 70.00 percent in 2023. This indicates that sugar availability in the region increased from the previous year (Table 41, Figure 44).

The sugar is also an alternative food ingredient for people in many countries in the world, which are facing food crisis. According to the analysis of sugar price, world export, and demand of sugar, the sugar producing countries will produce more sugar in order to meet the demand in ASEAN region. Thus, these countries will earn high revenue from their export.

Overall, although sugar production in ASEAN decreased and the beginning stock was sufficient for consumption within the ASEAN region. The reasons behind this are that the countries are experiencing higher consumption volumes due to economic recovery, also the domestic sugar prices have risen because of state policy adjustments. The sugar industry is expected to continue its steady growth, driven by factors such as Thailand's sugar production volume and the consistently increasing global demand for sugar.

► *Trade*

ASEAN's sugar exports decreased by 0.36 million tons or 4.57 percent from 7.80 million tons in 2023 to 7.44 million tons in 2024 (Table 37-38, Figure 36-37). For imports, ASEAN as a whole imported approximately 8.80 million tons of sugar in 2024, decrease from 9.31 million tons in 2023 (Table 37-38, Figure 39-40).

The quantity and value of sugar export by countries of destination and the quantity and value of import by countries of origin are given in Tables 42 and 43, respectively.

► *Prices*

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2023 - 2024 are shown in Tables 44 - 45. Thailand is the biggest of exporter in ASEAN countries. The annual average of Thailand FOB prices in 2024 (January-April) of raw sugar estimated by 528 US\$/tons and white sugar estimated by 659 US\$/tons.

► *Damaged Area*

The sugarcane damaged area in ASEAN in 2024 was reported to be 108 hectares which occurred in Cambodia due to Drought (Table 36).

Prospects for Sugar in 2025

► *Production*

Sugarcane production in ASEAN is forecasted to decrease by 9.75 million tons or 5.99 percent from 162.71 million tons in 2024 to 152.96 million tons in 2025 (Table 32-35, Figure 32-35). The sugarcane production trends for 2025 in ASEAN countries depict a mixed scenario. Cambodia, Indonesia, Lao PDR, and Myanmar are expected to increase in sugarcane production. On the other hand, Philippines, Thailand, and Vietnam are expected to decrease in sugarcane production. Thailand is the largest sugarcane-producing country in the region which forecasted to decrease its production from 82.43 million tons in 2024 to 72.31 million tons in 2025.

For **Indonesia in 2025**, the increase in production is attributed to the rise in both planted area and yield. The increase in planted area is influenced by farmers responding to price increases and government policy. Similarly, the increase in yield is also caused by favorable weather conditions.

For **Lao PDR in 2025**, the increase in production is attributed to the growth in both planted area and yield. The increase in planted areas is driven by farmers responding to price increases and government policy. Furthermore, the increase in yield is influenced by favorable weather conditions.

For **Vietnam in 2025**, the production is expected to drop due to the decrease in planted areas. The decrease in planted is attributed to an increase in the price of competing crops, while the increase in yield is attributed to farmers taking better care.

► *Utilization and Stock*

The domestic utilization of sugar in ASEAN is forecasted to decrease from 16.96 million tons of sugar in 2024 to 16.52 million tons in 2025, which decreases 0.44 million tons or 2.61 percent (Table 38-39). The beginning stock in ASEAN is estimated at 14.65 million tons of sugar in 2025, an increase of 0.21 million tons or 1.43 percent from 14.44 million tons in 2024. The ending stock of sugar in ASEAN is forecasted 14.15 million tons in 2025 which decreases by 0.50 million tons or 3.41 percent from 14.65 million tons in 2024. The ratio of production to domestic utilization in 2025 is forecast to be 88.76 percent, which is lower than the previous year from 93.21 percent. (Table 40, Figure 43). The ratio of the beginning stock to domestic utilization in 2025 is forecast to be 88.69 percent, which increase from 85.15 percent in 2024 (Table 41, Figure 44).

► *Trade*

The export is predicted to decrease from 7.44 million tons in 2024 to 7.40 million tons in 2025 (Table 38-39, Figure 36-38). The import is expected to be 8.76 million tons in 2025, which decrease from 8.80 million tons in 2024 (Tables 38-39, Figure 39-41).

Table 32 Sugarcane production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	170,379.97	162,705.74	-7,674.22	-4.50	152,956.06	-9,749.69	-5.99
Brunei	0.06	0.07	0.01	5.00	0.07	0.00	5.00
Cambodia	1,840.33	2,039.64	199.31	10.83	2,260.53	220.89	10.83
Indonesia	31,045.35	34,859.86	3,814.51	12.29	36,026.63	1,166.77	3.35
Lao PDR	1,653.98	1,481.00	-172.98	-10.46	1,600.00	119.00	8.04
Malaysia	N/A						
Myanmar	10,880.60	*11,592.60	712.01	6.54	*12,351.20	758.60	6.54
Philippines	19,434.11	*18,179.59	-1,254.51	-6.46	*17,006.06	-1,173.53	-6.46
Singapore	N/A						
Thailand	93,981.77	82,435.40	-11,546.37	-12.29	*72,307.58	-10,127.81	-12.29
Vietnam	11,543.76	12,117.57	573.81	4.97	11,403.97	-713.61	-5.89

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 33 Sugarcane planted area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	2,901.25	2,753.05	-148.19	-5.11	2,616.14	-136.91	-4.97
Brunei	N/A						
Cambodia	43.38	45.25	1.88	4.33	47.21	1.96	4.33
Indonesia	504.78	512.81	8.04	1.59	529.96	17.15	3.34
Lao PDR	34.11	30.00	-4.11	-12.05	32.87	2.87	9.57
Malaysia	N/A						
Myanmar	165.28	*170.27	4.99	3.02	*175.42	5.14	3.02
Philippines	340.49	*320.00	-20.48	-6.02	*300.76	-19.25	-6.02
Singapore	N/A						
Thailand	1,638.40	1,491.20	-147.20	-8.98	*1,357.23	-133.98	-8.98
Vietnam	174.82	183.51	8.69	4.97	172.70	-10.81	-5.89

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 34 Sugarcane harvested area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	2,901.14	2,752.95	-148.19	-5.11	2,616.06	-136.88	-4.97
Brunei	N/A						
Cambodia	43.27	45.15	1.88	4.34	47.13	1.99	4.40
Indonesia	504.78	512.81	8.04	1.59	529.96	17.15	3.34
Lao PDR	34.11	30.00	-4.11	-12.05	32.87	2.87	9.57
Malaysia	N/A						
Myanmar	165.28	*170.27	4.99	3.02	*175.42	5.14	3.02
Philippines	340.49	*320.01	-20.48	-6.02	*300.76	-19.25	-6.02
Singapore	N/A						
Thailand	1,638.40	1,491.20	-147.20	-8.98	*1,357.23	-133.98	-8.98
Vietnam	174.82	183.51	8.69	4.97	172.70	-10.81	-5.89

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 35 Sugarcane yield in ASEAN countries, 2023 – 2025

Unit: Ton/Hectare

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	58.73	59.10	0.37	0.63	58.47	-0.63	-1.07
Brunei	N/A						
Cambodia	42.53	45.18	2.65	6.23	47.96	2.78	6.15
Indonesia	61.50	67.98	6.48	10.54	67.98	0.00	0.00
Lao PDR	48.49	49.37	0.88	1.81	48.67	-0.70	-1.42
Malaysia	N/A						
Myanmar	65.83	*68.08	2.25	3.42	*70.41	2.33	3.42
Philippines	57.08	*56.81	-0.27	-0.47	*56.54	-0.27	-0.48
Singapore	N/A						
Thailand	57.36	55.28	-2.08	-3.63	*53.28	-2.00	-3.62
Vietnam	66.03	66.03	0.00	0.00	66.03	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 36 Sugarcane damaged area in ASEAN by cause of damage, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Others	Unspecified	
ASEAN	-	108	-	-	-	-	108
Brunei	-	-	-	-	-	-	-
Cambodia	-	108	-	-	-	-	108
Indonesia	-	-	-	-	-	-	-
Lao PDR.	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: N/A refers to data that is not available.

Table 37 Sugar balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	11,214,173	17,731,595	9,314,364	38,260,133	16,021,094	7,798,400	14,440,640	38,260,133
Brunei	3,552	-	3,165	6,717	5,130	-	1,587	6,717
Cambodia		184,033		184,033	*56,481	127,552	-	184,033
Indonesia	1,110,517	2,271,009	5,069,455	8,450,981	6,613,387	181,875	1,655,719	8,450,981
Lao PDR	79,969	330,796	176,634	587,399	207,336	184,263	195,799	587,399
Malaysia	-	-	1,950,312	1,950,312	*1,734,273	*216,039	-	1,950,312
Myanmar	686,089	869,795	*78,000	1,633,884	1,345,276	276,039	12,569	1,633,884
Philippines	344,021	1,862,562	639,000	2,845,583	1,644,910	-	1,200,673	2,845,583
Singapore	-	-	248,820	248,820	182,736	66,084	-	248,820
Thailand	8,700,000	11,059,024	287,978	20,047,002	2,500,000	6,541,357	11,005,645	20,047,002
Vietnam	290,026	1,154,376	861,000	2,305,402	1,731,564	205,191	368,647	2,305,402

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 38 Sugar balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	14,440,639	15,806,843	8,799,150	39,046,633	16,958,246	7,441,866	14,646,521	39,046,633
Brunei	1,587	-	5,383	6,969	5,294	-	1,676	6,969
Cambodia	-	203,963	-	203,963	*130,695	73,268	-	203,963
Indonesia	1,655,719	2,409,941	4,686,958	8,752,619	7,405,887	153,172	1,193,560	8,752,619
Lao PDR	195,799	296,200	72,862	564,861	268,968	45,909	249,984	564,861
Malaysia	-	-	*1,903,820	1,903,821	*1,705,009	*198,811	-	1,903,821
Myanmar	12,569	926,713	90,000	1,029,282	642,381	250,000	136,901	1,029,282
Philippines	*1,200,673	1,950,000	498,673	3,649,346	2,200,000	-	1,449,346	3,649,346
Singapore	-	-	189,052	189,052	125,292	63,760	-	189,052
Thailand	11,005,645	8,808,269	*250,000	20,063,914	2,570,000	*6,500,000	10,993,914	20,063,914
Vietnam	368,647	1,211,757	1,102,401	2,682,805	1,904,720	156,946	621,139	2,682,805

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 39 Sugar balance sheet of ASEAN countries, 2025

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	14,646,521	14,659,236	8,759,734	38,065,491	16,515,111	7,403,969	14,146,411	38,065,491
Brunei	1,676	-	5,041	6,717	5,273	-	1,444	6,717
Cambodia	-	226,053	-	226,053	*136,666	89,387	-	226,053
Indonesia	1,193,560	2,435,295	4,686,958	8,315,813	6,969,082	153,172	1,193,560	8,315,813
Lao PDR	249,984	320,000	-	569,984	262,371	-	307,614	569,984
Malaysia	-	-	*1,858,437	1,858,437	*1,675,480	*182,957	-	1,858,437
Myanmar	136,901	*987,355	*90,000	1,214,257	*647,032	*250,000	317,224	1,214,257
Philippines	1,449,346	*1,824,070	*400,000	3,673,416	*2,000,000	-	1,673,416	3,673,416
Singapore	-	-	218,936	218,936	154,014	64,922	-	218,936
Thailand	10,993,914	*7,726,065	*250,000	18,969,980	*2,570,000	*6,500,000	9,899,980	18,969,980
Vietnam	621,139	1,140,397	1,250,361	3,011,897	2,095,192	163,532	753,173	3,011,897

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 40 Ratio of sugar production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	17,731,595	16,021,094	110.68	15,806,843	16,958,246	93.21	14,659,236	16,515,111	88.76
Brunei	-	5,130	-	-	5,294	-	-	5,273	-
Cambodia	184,033	56,481	325.83	203,963	130,695	156.06	226,053	136,666	165.41
Indonesia	2,271,009	6,613,387	34.34	2,409,941	7,405,887	32.54	2,435,295	6,969,082	34.94
Lao PDR	330,796	207,336	159.55	296,200	268,968	110.12	320,000	262,371	121.96
Malaysia	-	1,734,273	-	-	1,705,009	-	-	1,675,480	-
Myanmar	869,795	1,345,276	64.66	926,713	642,381	144.26	987,355	647,033	152.60
Philippines	1,862,562	1,644,910	113.23	1,950,000	2,200,000	88.64	1,824,070	2,000,000	91.20
Singapore	-	182,736	-	-	125,292	-	-	154,014	-
Thailand	11,059,024	2,500,000	442	8,808,269	2,570,000	343	7,726,066	2,570,000	301
Vietnam	1,154,376	1,731,564	66.67	1,211,757	1,904,720	63.62	1,140,397	2,095,192	54.43

Remark: * The value is estimated by AFSIS Secretariat.

Table 41 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	11,214,173	16,021,094	70.00	14,440,639	16,958,246	85.15	14,646,521	16,515,111	88.69
Brunei	3,552	5,130	69.23	1,587	5,294	29.97	1,676	5,273	31.78
Cambodia	-	56,481	-	-	130,695	-	-	136,666	-
Indonesia	1,110,517	6,613,387	16.79	1,655,719	7,405,887	22.36	1,193,560	6,969,082	17.13
Lao PDR	79,969	207,336	38.57	195,799	268,968	72.80	249,984	262,371	95.28
Malaysia	-	1,734,273	-	-	1,705,009	-	-	1,675,480	-
Myanmar	686,089	1,345,276	51.00	12,569	642,381	1.96	136,901	647,033	21.16
Philippines	344,021	1,644,910	20.91	1,200,673	2,200,000	54.58	1,449,346	2,000,000	72.47
Singapore	-	182,736	-	-	125,292	-	-	154,014	-
Thailand	8,700,000	2,500,000	348	11,005,645	2,570,000	428	10,993,914	2,570,000	428
Vietnam	290,026	1,731,564	16.75	368,647	1,904,720	19.35	621,139	2,095,192	29.65

Remark: * The value is estimated by AFSIS Secretariat.

Table 42 Quantity and Value of Sugar Export by Countries of Destination in 2024

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia														
Indonesia	14	18,249							1,152	847,193			1.64	3,280
Lao PDR														
Malaysia	3.96	2,460	0.24	152	21,005	14,464,208					6,000	3,914,608	2,541	1,986,877
Myanmar	N/A													
Philippines	N/A													
Singapore	N/A													
Thailand	844	604,637	259,512	168,718,796	658,913	351,041,501	170,272	112,438,205	106,868	63,430,459	32,671	26,934,037	28,393	19,988,866
Vietnam		6,983		4,098,547		6,526,596		433,153		3,144,146				20,247,879

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia			1,000.00	1,133,000.00	4,500.00	5,098,500.00	5,500.00	6,231,500.00	122,052.46	138,285,437.18	127,552.46	144,516,937.18
Indonesia	1,083	714,153	7,850	4,997,563	19,350	14,766,966	29,450	21,347,403	13,100	9,732,036	42,551	31,079,439
Lao PDR					13,428	7,468,960	13,428	7,468,960	32,481	17,923,986	45,909	25,392,946
Malaysia	9,388	6,630,463	820	580,236	1,650	1,335,620	41,408	28,914,624	24,862	17,683,481	66,271	46,598,105
Myanmar	N/A											
Philippines	N/A											
Singapore	N/A											
Thailand	40,907	29,206,472			88,329	48,711,430	1,386,709	821,074,403	990,292	569,742,951	2,377,001	1,390,817,354
Vietnam		818,921		13,971,491			-	49,247,716	-	76,055,481	-	125,303,196

Remark: The data in this table is obtained from national focal points of member states and may not complete. N/A refers to data that is not available.

Table 43 Quantity and Value of Sugar Import by Countries of Origin in 2024

Quantity: Tons Values: US\$

Importing Country	Country of origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									25,001	18,033,549				
Lao PDR														
Malaysia					594	602,946							3.50	14,334
Myanmar														
Philippines														
Singapore					3,241	9,723			33,976	101,928	40	121	1.73	5.00
Thailand			6.32	35,224	50,859	23,601,451	12,990	2,438,984	684	1,865,958	72	30,509	330	1,441,105
Vietnam				16,819,012		11,945,409		23,746,367		4,099,926		21,001,808		3,954,662

Importing Country	Country of origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	9.18	253	675,300	410,084,506			700,310	428,118,308	1,168,617	714,373,977	1,868,927	1,142,492,285
Lao PDR			46,887	23,387,393			46,887	23,387,393	25,975	12,958,865	72,862	36,346,258
Malaysia	10.71	13,427	116,095	74,230,015	20.52	16,761	116,724	74,877,483	517,883	314,256,588	634,607	389,134,071
Myanmar												
Philippines			4,750	3,197,500			4,750	3,197,500			4,750	3,197,500
Singapore			125,578	376,735	1,791	5,374	164,629	493,886	44,722	35,300,835	209,351	35,794,721
Thailand	287	805,654			57,537	16,870,378	122,765	47,089,263	185,327	127,449,733	308,092	174,538,996
Vietnam		9,102,082		49,907,049			-	140,576,315	-	112,955,376	-	253,531,691

Remark: The data in this table is obtained from national focal points of member states and may not complete. N/A refers to data that is not available.

Table 44 FOB Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2023	628	637	660	1906	674	673	671	705	729	767	804	787	803
		2024	778	651	747	726									725
Lao PDR	Not specified	2023	250	250	250	470	572	597	550	546	570	591	587	573	484
		2024	584	566	542	589	563								569
Malaysia	Not specified	2023	608	585	631	640	613	659	678	702	716	693	704	730	663
		2024	708	697	695	725									706
Myanmar	Not specified	2023	48	47	47	79							63	40	54
		2024	40	40	40										40
Philippines	MUSCOVADO Exports	2023	1,976	2,034	1,738	1,852	1,906	1,818	1,997	2,077	2,059	2,052	2,015	2,045	1,964
		2024	1,799	1,931	2,195	1,903	2,010	2,004							1,974
	MOLASSES Imports	2023	188	180	178	198	173	195	202	182	186	182	185	192	187
		2024	187	182	219	207	246								208
Thailand	Raw Sugar	2023	488	456	451	457	454	462	495	461	472	476	511	591	481
		2024	508	528	550	524									528
	White Sugar	2023	583	540	550	573	603	600	633	630	641	654	710	703	618
		2024	659	673	669	634									659

Remark: N/A refers to data that is not available.

Table 45 CIF Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2023	500	504	516	549	570	585	573	613	561	603	620	654	571
		2024	611	617	619										616
Lao PDR	Not specified	2023	442	446	440	496	494	497	499	500	496	453	461	454	473
		2024	499	499	490	452	476								483
Malaysia	Not specified	2023	555	514	573	542	649	632	694	602	641	650	690	712	621
		2024	624	616	599	658									624
Singapore	Not specified	2023	596	610	626	620	681	708	725	723	729	763	762	307	654
		2024	771	762	762	750	745	745	745	745	745	745	745	745	750

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

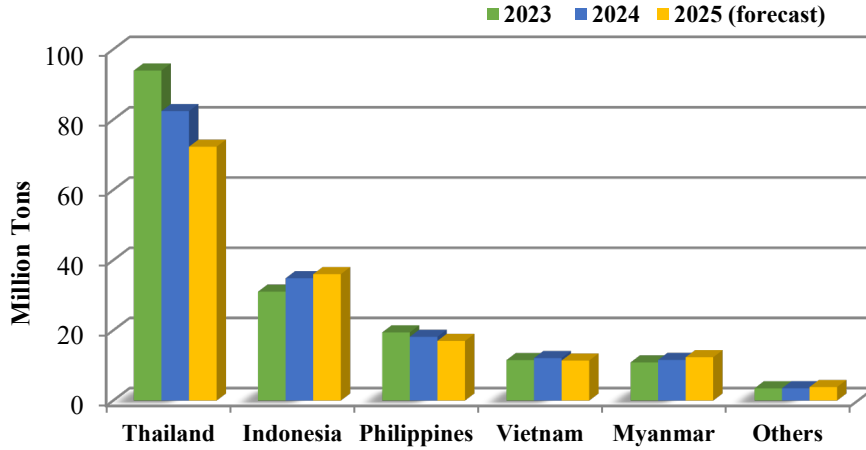


Figure 32 Sugarcane production of selected countries in ASEAN, 2023 – 2025

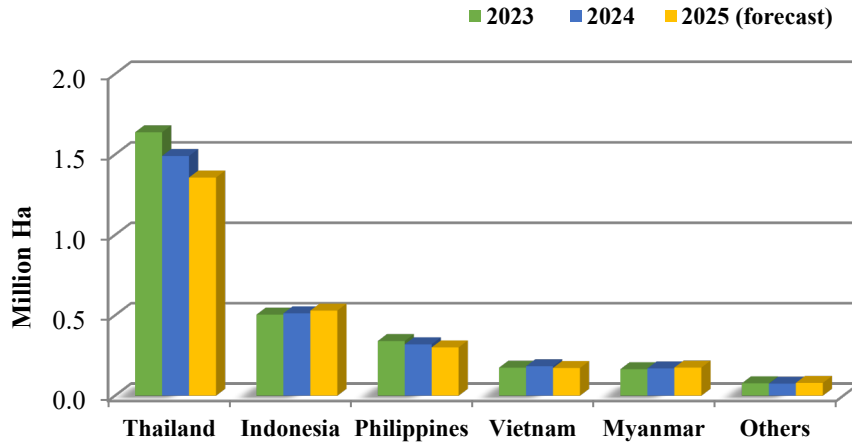


Figure 33 Sugarcane planted area of selected countries in ASEAN, 2023 – 2025

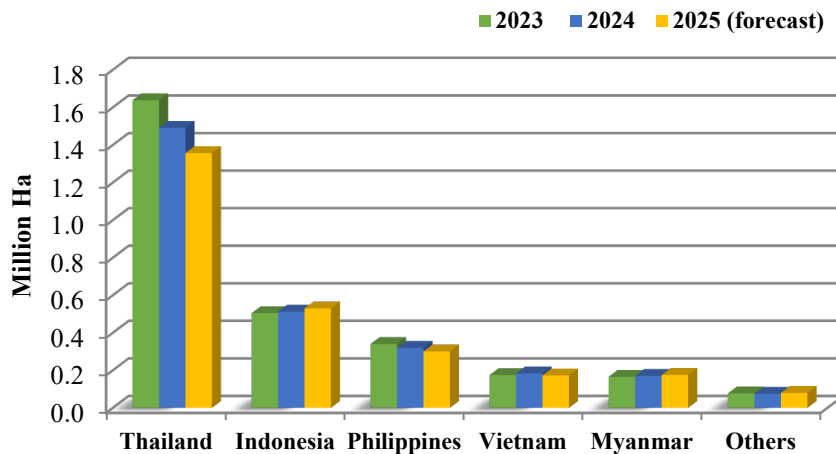


Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2023 – 2025

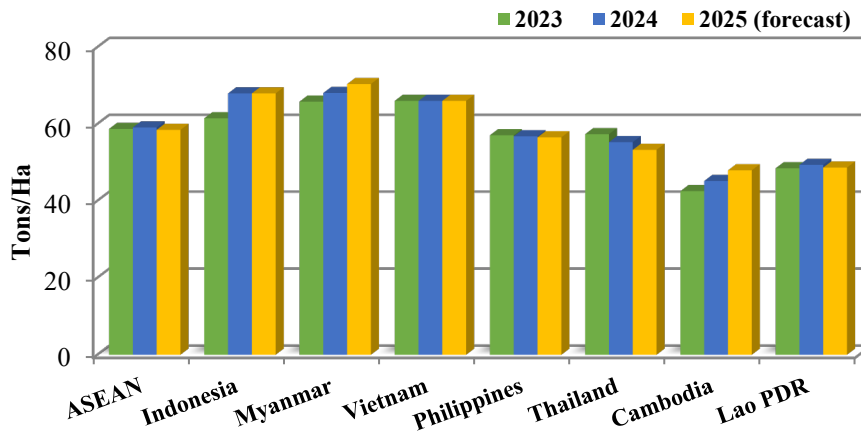


Figure 35 Sugarcane yield of selected countries in ASEAN, 2023 – 2025

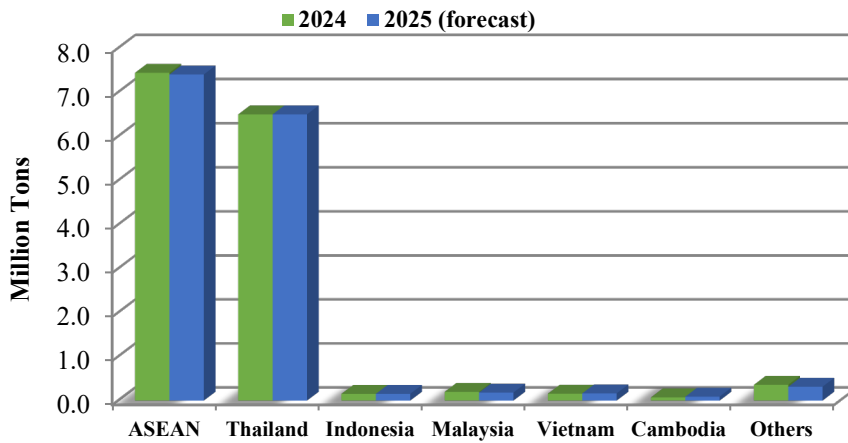
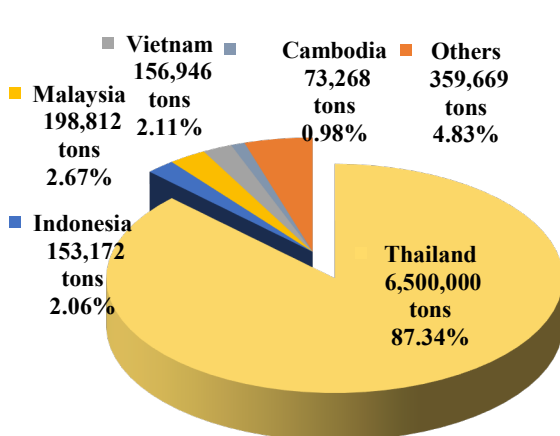
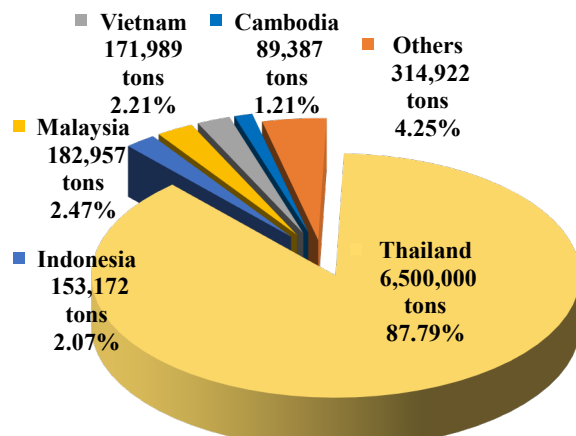


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 7.44 Million Tons

Figure 37 Share of sugar export (tons) among ASEAN countries, 2024



Total 7.40 Million Tons

Figure 38 Share of sugar export (tons) among ASEAN countries, 2025

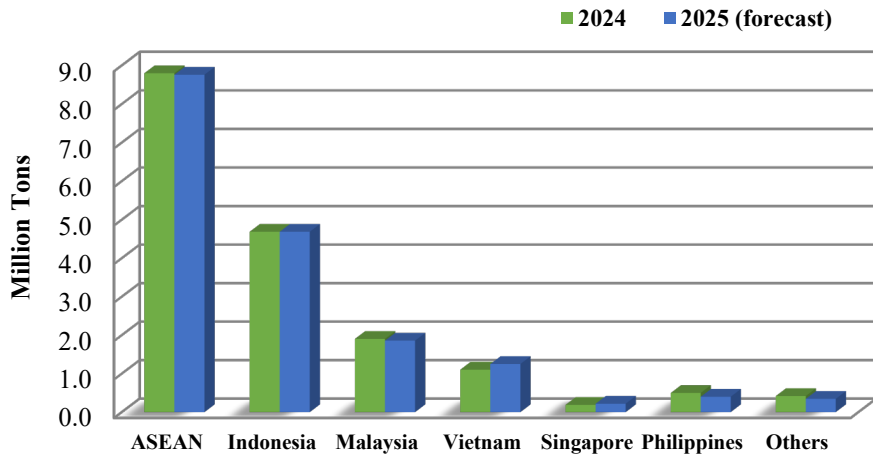
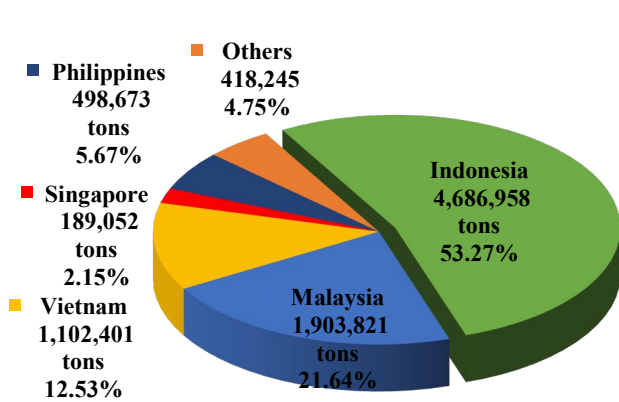
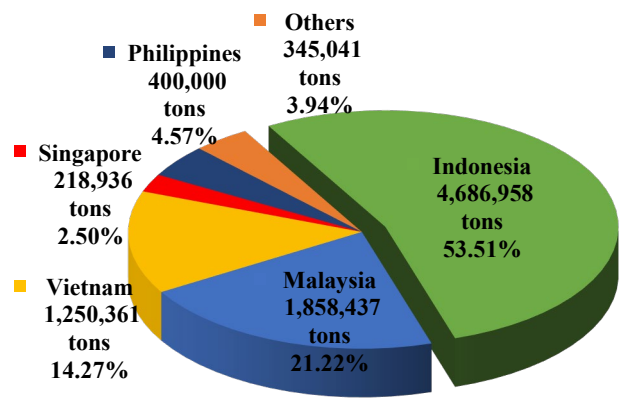


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 8.80 Million Tons
Figure 40 Share of sugar import (tons) among ASEAN countries, 2024



Total 8.76 Million Tons
Figure 41 Share of sugar import (tons) among ASEAN countries, 2025

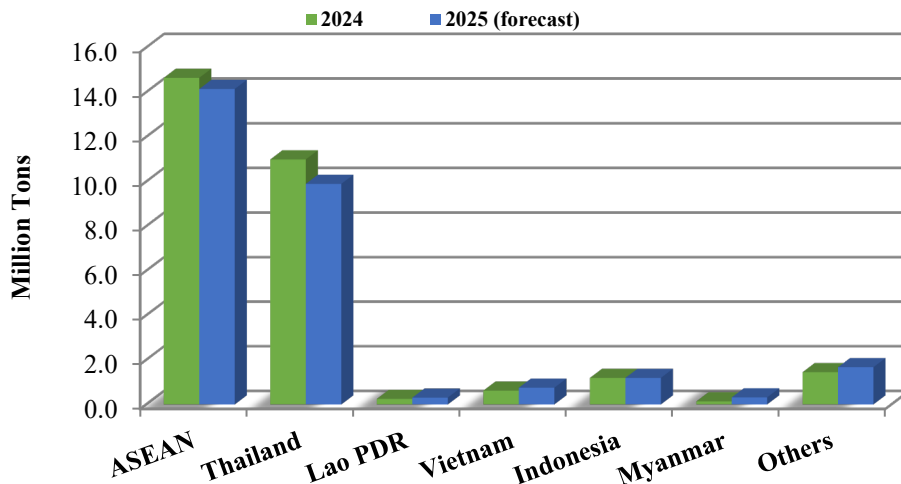


Figure 42 Amount of ending stock of Sugar in ASEAN countries in 2024 – 2025

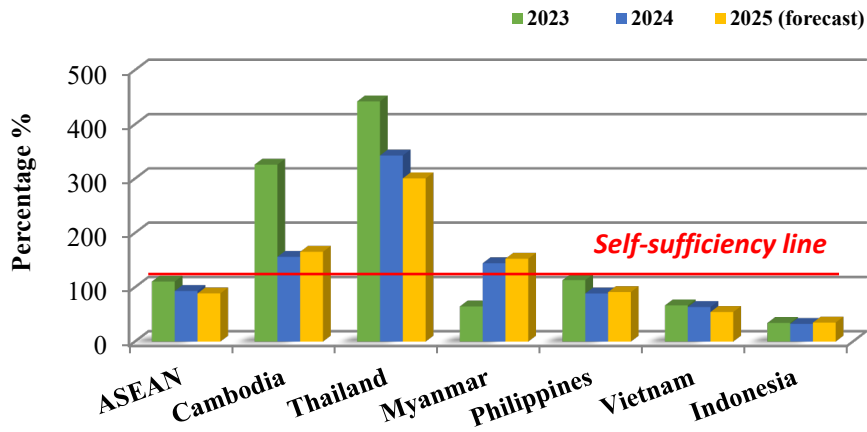


Figure 43 Ratio of sugar production to domestic utilization in ASEAN countries, 2023 – 2025

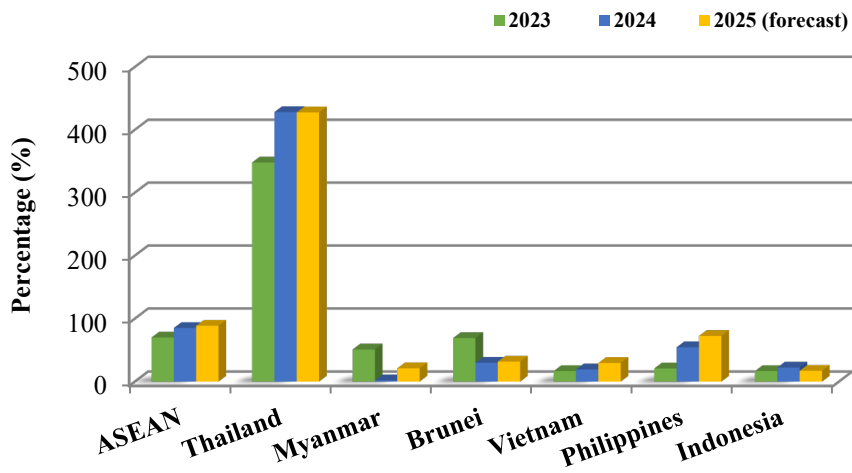


Figure 44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

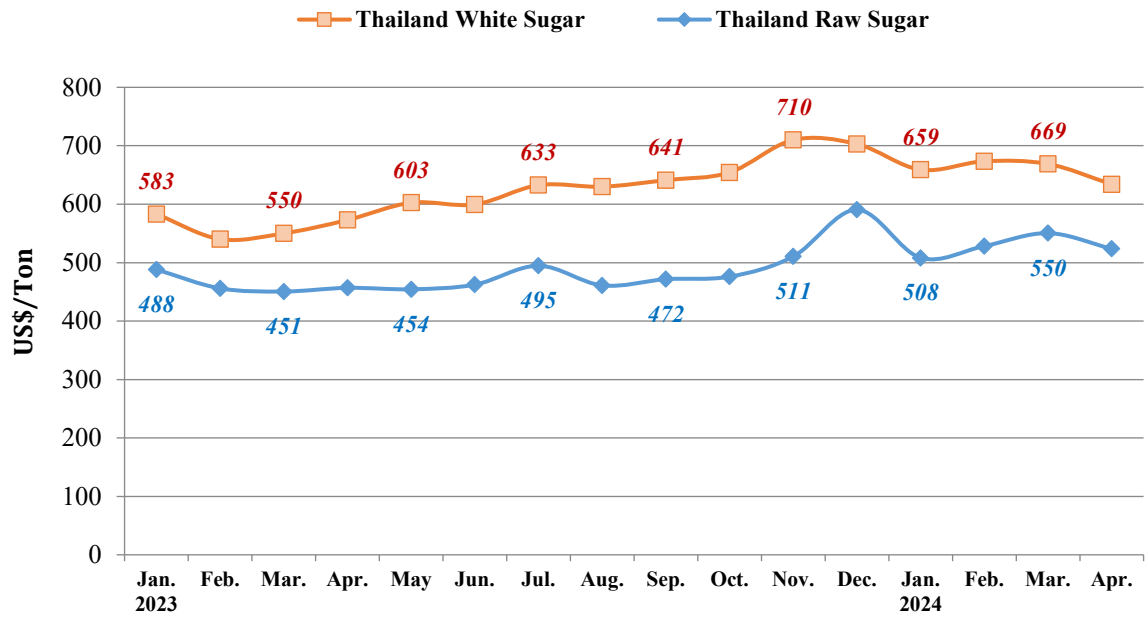


Figure 45 FOB price (US\$/Ton) of white sugar and raw sugar in Thailand in 2023 – 2024

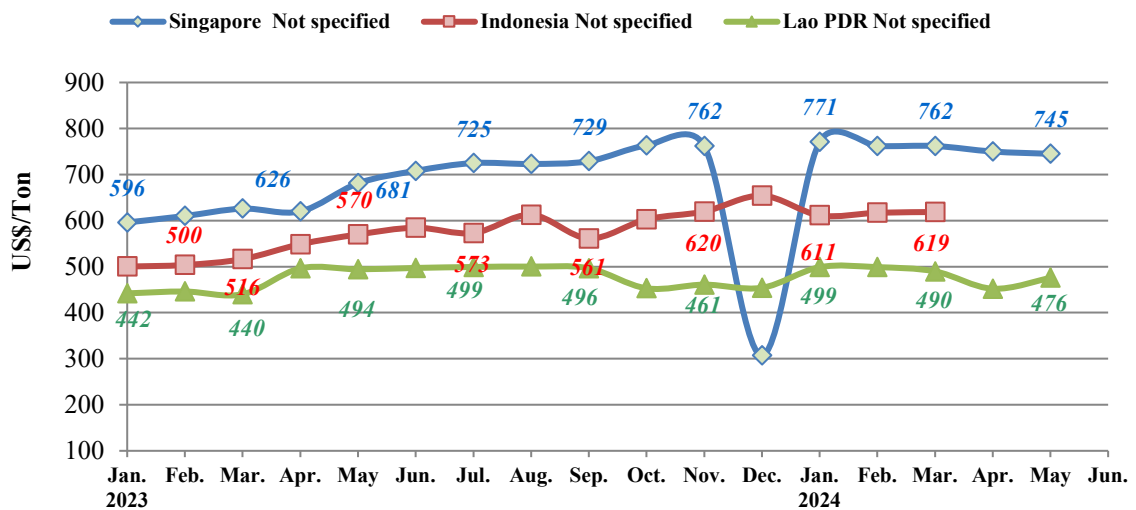


Figure 46 CIF price (US\$/Ton) of sugar of selected countries in ASEAN in 2023-2024

Soybean Outlook for 2025

Highlights

The forecast for the supply of ASEAN soybeans indicates an increase from 10.00 million tons in 2024 to 10.37 million tons in 2025, increasing 0.37 million tons or 3.70 percent (Table 46). This growth in supply of soybean from increases in beginning stock and imports. The Beginning stock is estimated at 0.42 in 2025 which increase in 0.15 million tons or 55.56 percent from 0.27 million tons in 2024. The soybean production for 2025 is 0.66 million tons, reflecting a decrease from the previous year's production of 0.67 million tons. The import of soybean is forecast to increase by 0.23 million tons or 2.54 percents from 9.06 million tons in 2024 to 9.29 million tons in 2025.

The increase in demand of soybean is primarily attributed to domestic utilization and ending stock carried over from 2024. The domestic utilization is forecasted to increase by 0.15 million tons or 1.58 percent from 9.49 million tons in 2024 to 9.64 million tons in 2025. The export number is forecasted to be remain stable which is no different from previous year.

The production to domestic utilization ratio (self-sufficiency ratio) in 2025 is forecasted to be 6.90 percent, which is decreased from 7.05 percent in 2024. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 4.36 percent in 2025, which increased from 2.83 percent in previous year.

Table 46 Summary of the ASEAN soybean situation, 2024 – 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	10.00	10.37	0.37	3.70
Beginning stock	0.27	0.42	0.15	55.56
Production	0.67	0.66	-0.01	-1.49
Import	9.06	9.29	0.23	2.54
Demand (Million tons)	10.00	10.37	0.37	3.70
Domestic utilization	9.49	9.64	0.15	1.58
Export	0.09	0.09	0.00	0.0
Ending stock	0.42	0.64	0.22	52.38
Ratio of production to domestic utilization (%)	7.05	6.90	-0.15	-
Ratio of beginning stock to domestic utilization (%)	2.83	4.36	1.53	-

ASEAN Soybean Situation 2024

► *Production*

The estimated soybean production in ASEAN for the crop year 2023/24 (2024) is 0.67 million tons, an increase of 0.15 million tons from the 0.52 million tons in 2023 (crop year 2022/23). The production in ASEAN increased due to gains in Cambodia, Indonesia, and Myanmar. Additionally, Indonesia was the most soybean producer in ASEAN country, the production is rising by 0.14 million tons or 65.05 percent, from 0.22 million tons in 2023 to 0.36 million tons in 2024. Despite, production decreased in Lao PDR, Philippines, Thailand, and Vietnam (Table 47-50, Figure 47-50).

For **Cambodia in 2024**, the increase in planted areas resulted from farmers responding to a price increase and a decrease in the price of competing crops, while the decrease in yield was a result of plant diseases and farmers applying less fertilizer to their crops.

For **Indonesia in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by favorable weather and government policy. Similarly, the increase in yield was also due to favorable weather conditions, farmers using more improved varieties, and taking better care of their crops.

For **Lao PDR in 2024**, the decrease in production was due to the decrease in planted area and yield. The decrease in planted area was due to an increase in the price of competing crops and other commodities selling at good prices than soybean. Moreover, the decrease in yield was attributed to farmers using less fertilizer.

For **Myanmar in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding

to a price increase. Furthermore, the increase in yield was influenced by favorable weather and farmers taking care of their crops.

For the **Philippines in 2024**, the increase in production was attributed to the rise in yield. The increase in yield was attributed to favorable weather, as sunny conditions allowed farmers to apply more fertilizer and insecticide to their crops.

For **Thailand in 2024**, the decrease in production was due to the decrease in both planted area and yield. The decrease in planted areas was attributed to low returns and high prices for production factors. In addition, there is a shortage of labor for harvesting. Similarly, the yield decreased because many farmers chose to cultivate other profitable crops such as maize and cassava.

► *Utilization and Stock*

The domestic utilization of soybean in ASEAN increased to 9.49 million tons in 2024 from 8.97 million tons in 2023 (Table 52-53). The beginning stock of soybeans in ASEAN in 2024 was estimated at 0.27 million tons, decrease from 0.33 million tons in 2023. The ending stock of sugar in ASEAN in 2024 was estimated to be 0.42 million tons compared to 0.27 million tons in 2023.

The self-sufficiency ratio, which represents the ratio of production to domestic utilization in ASEAN for 2024, was 7.05 percent, indicating an increase from approximately 5.80 percent in 2023 (Table 55, Figure 58). Additionally, the food security ratio, which signifies the ratio of beginning stock to domestic utilization in ASEAN for 2024, was estimated to be 2.83 percent, showing a decrease from 3.64 percent in 2023 (Table 56, Figure 59).

In summary, soybean production in ASEAN increased and the overall production volume remains sufficient to meet consumption demands within the region and the global. Today, about 76 percent is primarily used as low-cost, quality protein for animal feed and dairy production. 20 percent is consumed as edible oils and human food products (such as tofu, soy milk, and tempeh), and 4 percent is used for industrial purposes and biodiesel (Global Market Report, February 2024). The global demand for soybeans is rising, propelled largely by consumer interest in animal and plant-based protein options. Moreover, ASEAN countries continue to depend on soybeans heavily imports and show a tendency to increase imports.

► *Trade*

In 2024, ASEAN exported a total of 85,824 tons of soybeans, a decrease of 8,075 tons from 77,749 tons in 2023. Moreover, ASEAN countries collectively imported 9.06 million tons of soybeans in 2024, an increase of 0.59 million tons from 8.47 million tons in 2023 (Table 52-53, Figure 51-52).

The quantity and value of soybean exports by countries of destination and the quantity and value of soybean imports by countries of origin are given in Table 57-58.

► *Prices*

The monthly FOB price of soybean for exporting countries during 2023 -2024 are shown in Table 59 and the monthly CIF prices for importing countries are shown in Table 60. (Table 59, Figure 60)

Damaged Area

The total damaged area of soybean in the ASEAN in 2024 was estimated to be 64 hectares. The major cause of damage was flooding 38 hectares in Myanmar and drought 26 hectares in Cambodia. (Table 51).

Reference: International Institute for Sustainable Development. Global Market Report. (February, 2024). Soybean prices and sustainability. Retrieved from <https://www.iisd.org/system/files/2024-02/2024-global-market-report-soybean.pdf>

Prospects for Soybean in 2025

► *Production*

The forecast for soybean production in ASEAN in 2025 indicates an expected decrease of 0.05 million tons, or 0.72 percent, from 0.67 million tons in 2024 to 0.66 million tons in 2025 (Table 47, Figure 47). The overall production is expected to decrease in Indonesia, Lao PDR, Philippines, Thailand, and Vietnam. However, production in Cambodia and Myanmar is expected to increase.

For **Indonesia in 2025**, the decrease in production is attributed to the reduction in planted area affected by farmers responding to price decreases, an increase in the price of competing crops, and competition with other crop commodities. Meanwhile, the increase in yield is attributed to favorable weather conditions, farmers using more improved varieties, and taking better care of their crops.

For **Lao PDR in 2025**, the decrease in the planted area is due to an increase in the price of competing crops, and government policies.

For **Vietnam in 2025**, the decrease in planted areas is attributed to an increase in the price of competing crops.

► *Utilization and Stock*

The domestic utilization of soybeans in ASEAN is forecast to increase by 0.15 million tons or 1.58 percent from 9.49 million tons in 2024 to 9.64 million tons in 2025 (Table 53-54).

The beginning stock in ASEAN in 2024 is forecast to increase by 0.15 million tons or about 56.25 percent from 0.27 million tons in 2024 to 0.42 million tons in 2025 (Table 53-54). The ending stock in ASEAN in 2025 is forecast to increase by 0.22 million tons or about 53.36 percent from 0.42 million tons in 2024 to 0.64 million tons in 2025 (Table 53-54, Figure 57).

In 2025, the ratio of production to domestic utilization (self-sufficiency ratio) is forecast to be 6.90 percent, which decrease from 7.05 percent in 2024 (Table 55, Figure 58). The ratio of beginning stock to the domestic utilization (food security ratio) is forecast to be 4.36 percent in 2025, which increases 1.53 percent from 2024 (Table 56, Figure 59).

► *Trade*

The export of soybeans is forecast to increase by 7,433 tons or about 8.66 percent from 85,824 tons in 2024 to 93,257 tons in 2025. The import of soybeans is forecast to increase by 0.23 million tons or about 2.52 percent from 9.06 million tons in 2024 to 9.29 million tons in 2025. (Table 53 and 54, Figure 51, 53, 54, and 56)

Table 47 Soybean production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	520.37	669.59	149.21	28.67	664.73	-4.85	-0.72
Brunei	N/A						
Cambodia	21.71	22.64	0.94	4.31	23.62	0.98	4.31
Indonesia	220.12	363.31	143.18	65.05	347.45	-15.86	-4.36
Lao PDR	10.29	6.23	-4.06	-39.46	6.00	-0.23	-3.69
Malaysia	N/A						
Myanmar	198.93	210.27	11.35	5.70	*222.28	12.01	5.71
Philippines	0.61	*0.60	-0.01	-1.33	*0.45	-0.15	-24.77
Singapore	N/A						
Thailand	20.37	19.55	-0.82	-4.03	*18.76	-0.79	-4.02
Vietnam	48.34	46.98	-1.36	-2.81	46.17	-0.81	-1.72

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 48 Soybean planted area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	374.57	393.25	18.68	4.99	386.56	-6.69	-1.70
Brunei	N/A						
Cambodia	12.71	13.52	0.82	6.42	14.39	0.87	6.42
Indonesia	182.71	196.60	13.88	7.60	182.71	-13.88	-7.06
Lao PDR	4.01	2.53	-1.48	-36.91	2.40	-0.13	-5.14
Malaysia	N/A						
Myanmar	132.25	139.33	7.08	5.35	*146.78	7.46	5.35
Philippines	*0.44	*0.33	-0.11	-24.77	*0.25	-0.08	-24.77
Singapore	N/A						
Thailand	12.37	11.94	-0.43	-3.51	*11.52	-0.42	-3.51
Vietnam	30.08	29.00	-1.08	-3.59	28.50	-0.50	-1.72

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 49 Soybean harvested area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	330.16	393.15	62.99	19.08	386.37	-6.79	-1.73
Brunei	N/A						
Cambodia	12.64	13.50	0.86	6.84	14.31	0.81	6.00
Indonesia	138.53	196.60	58.07	41.92	182.71	-13.88	-7.06
Lao PDR	4.01	2.53	-1.48	-36.91	2.40	-0.13	-5.14
Malaysia	N/A						
Myanmar	132.25	*139.29	7.04	5.32	*146.70	7.42	5.33
Philippines	0.44	0.33	-0.11	-24.77	0.25	-0.08	-24.77
Singapore	N/A						
Thailand	12.34	11.91	-0.44	-3.53	*11.48	-0.42	-3.53
Vietnam	29.96	29.00	-0.96	-3.20	28.50	-0.50	-1.72

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 50 Soybean yield in ASEAN countries, 2023 – 2025

Unit: Tons/Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	1.58	1.70	0.13	8.06	1.72	0.02	1.02
Brunei	N/A						
Cambodia	1.72	1.68	-0.04	-2.37	1.65	-0.03	-1.59
Indonesia	1.59	1.85	0.26	16.30	1.90	0.05	2.90
Lao PDR	2.57	2.46	-0.10	-4.04	2.50	0.04	1.52
Malaysia	N/A						
Myanmar	1.50	1.51	0.01	0.36	1.52	0.01	0.36
Philippines	1.40	1.84	0.44	31.17	1.84	0.00	0.00
Singapore	N/A						
Thailand	1.65	1.64	-0.01	-0.52	1.63	-0.01	-0.51
Vietnam	1.61	1.62	0.01	0.40	1.62	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 51 Soybean damaged area in ASEAN by cause of damage, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	38	26	-	-	-	-	64
Brunei	-	-	-	-	-	-	-
Cambodia	-	26	-	-	-	-	26
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	38	-	-	-	-	-	38
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: N/A refers to data that is not available.

Table 52 Soybean balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	326,743	520,612	8,472,977	9,320,332	8,973,741	77,749	268,842	9,320,332
Brunei	0	0	588	588	588	0	0	588
Cambodia		21,705	*50,446	72,151	18,075	*54,076	0	72,151
Indonesia	162,000	220,124	2,274,428	2,656,552	2,532,612	2,561	121,379	2,656,552
Lao PDR	112	10,290	726	11,128	5,775	0	5,353	11,128
Malaysia	*64,000	0	*794,817	858,817	*787,176	*9,641	62,000	858,817
Myanmar	6,106	198,928	1,308	206,342	199,706	166	6,470	206,342
Philippines	*11,000	614	*185,000	196,614	*190,000	0	6,614	196,614
Singapore	0	0	21,695	21,695	21,413	282	0	21,695
Thailand	0	20,611	3,284,969	3,305,580	3,305,281	299	0	3,305,580
Vietnam	83,524	48,340	1,859,000	1,990,864	1,913,115	10,724	67,025	1,990,864

Remark: * The value is estimated by AFSIS Secretariat.

Table 53 Soybean balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	268,842	669,402	9,059,393	9,997,638	9,491,736	85,824	420,078	9,997,638
Brunei	0	0	617	617	617	0	0	617
Cambodia	0	22,641	*51,087	73,728	18,878	*54,850	0	73,728
Indonesia	121,379	363,306	2,298,538	2,783,222	2,569,146	5,354	208,723	2,783,222
Lao PDR	5,353	6,230	1,827	13,411	5,544	7,618	248	13,411
Malaysia	62,000	0	*807,216	869,216	*799,211	*10,005	60,000	869,216
Myanmar	6,470	210,274	392	217,136	197,904	220	19,012	217,136
Philippines	6,614	*605	*190,000	197,219	*182,000	0	15,219	197,219
Singapore	0	0	20,716	20,716	20,637	79	0	20,716
Thailand	0	19,366	3,400,000	3,419,366	3,419,066	300	0	3,419,366
Vietnam	67,025	46,980	2,289,000	2,403,005	2,278,733	7,398	116,875	2,403,005

Remark: * The value is estimated by AFSIS Secretariat.

Table 54 Soybean balance sheet of ASEAN countries, 2025

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	420,078	664,735	9,287,706	10,372,519	9,635,022	93,257	644,239	10,372,519
Brunei	0	0	648	648	648	0	0	648
Cambodia	0	23,617	*63,470	87,087	19,349	*67,738	0	87,087
Indonesia	208,723	347,448	2,362,950	2,919,120	2,593,364	5,364	320,391	2,919,120
Lao PDR	248	6,000	0	6,248	5,313	0	935	6,248
Malaysia	60,000	0	*819,808	879,808	*811,430	*10,382	57,996	879,808
Myanmar	19,012	*222,280	*117	241,410	*196,862	*291	44,256	241,410
Philippines	15,219	*455	*195,135	210,810	*174,336	0	36,473	210,810
Singapore	0		21,206	21,206	21,025	181	0	21,206
Thailand	0	*18,765	*3,400,000	3,418,765	3,418,465	*300	0	3,418,765
Vietnam	116,875	46,170	2,424,371	2,587,415	2,394,228	9,000	184,187	2,587,415

Remark: * The value is estimated by AFSIS Secretariat.

Table 55 Ratio of soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	520,612	8,973,741	5.80	669,402	9,491,736	7.05	664,735	9,635,022	6.90
Brunei	0	588	0.00	0	617	0.00	0	648	0.00
Cambodia	21,705	18,075	120.08	22,641	18,878	119.94	23,617	19,349	122.06
Indonesia	220,124	2,532,612	8.69	363,306	2,569,146	14.14	347,448	2,593,364	13.40
Lao PDR	10,290	5,775	178.19	6,230	5,544	112.37	6,000	5,313	112.92
Malaysia	0	787,176	0.00	0	799,211	0.00	0	811,430	0.00
Myanmar	198,928	199,706	99.61	210,274	197,904	106.25	222,280	196,862	112.91
Philippines	614	190,000	0.32	606	182,000	0.33	456	174,337	0.26
Singapore	0	21,413	0.00	0	20,637	0.00	0	21,025	0.00
Thailand	20,611	3,305,281	0.62	19,366	3,419,066	0.57	18,765	3,418,465	0.55
Vietnam	48,340	1,913,115	2.53	46,980	2,278,733	2.06	46,170	2,394,228	1.93

Remark: * The value is estimated by AFSIS Secretariat.

Table 56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	326,743	8,973,741	3.64	268,842	9,491,736	2.83	420,078	9,635,022	4.36
Brunei	0	588	0.00	0	617	0.00	0	648	0.00
Cambodia	0	18,075	0.00	0	18,878	0.00	0	19,349	0.00
Indonesia	162,000	2,532,612	6.40	121,379	2,569,146	4.72	208,723	2,593,364	8.05
Lao PDR	112	5,775	1.95	5,353	5,544	96.56	248	5,313	4.68
Malaysia	64,000	787,176	8.13	62,000	799,211	7.76	60,000	811,430	7.39
Myanmar	6,106	199,706	3.06	6,470	197,904	3.27	19,012	196,862	9.66
Philippines	11,000	190,000	5.79	6,614	182,000	3.63	15,219	174,337	8.73
Singapore	0	21,413	0.00	0	20,637	0.00	0	21,025	0.00
Thailand	0	3,305,281	0.00	0	3,419,066	0.00	0	3,418,465	0.00
Vietnam	83,524	1,913,115	4.37	67,025	2,278,733	2.94	116,875	2,394,228	4.88

Remark: * The value is estimated by AFSIS Secretariat.

Table 57 Quantity and Value of Soybean Export by Countries of Destination in 2024

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia														
Indonesia	7.50	5,040							0.05	16				
Lao PDR														
Malaysia														
Myanmar														
Philippines	N/A													
Singapore	N/A													
Thailand			11	17,262			44	16,000	5.00	7,007				
Vietnam				733,753				42,979						

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia			19,770	11,387,520	35,080	20,206,080	54,850	31,593,600	0.0020	1.152	54,850	31,593,601
Indonesia							8	5,056	808	351,763	815	356,819
Lao PDR							0	0	7,618	2,873,695	7,618	2,873,695
Malaysia		85,610					0	85,610	0	4,447	0	90,057
Myanmar							0	0	220.00	193,000	220	193,000
Philippines	N/A											
Singapore	N/A											
Thailand	6.77	17,764					67	58,033	13	12,429	80	70,462
Vietnam							0	776,733		36,819	0	813,552

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 58 Quantity and Value of Soybean Import by Countries of Origin in 2024

Quantity: Tons Values: US\$

Importing Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									2,406	1,444,299	0.016	37		
Lao PDR											640	299,549		
Malaysia												420		
Myanmar														
Philippines									169	168,631				
Singapore					2.00	7,914			1,567	2,244,612	0.20	438		
Thailand			500	210,020										
Vietnam			2,997	2,166,538										

Importing Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.0010	2.00			0.0020	5.00	2,406	1,444,343	878,434	488,713,564	880,840	490,157,907
Lao PDR			762	329,168	93	51,426	1,495	680,143	332	181,966	1,827	862,109
Malaysia							0	420		103,449,839	0	103,450,259
Myanmar							0	0	392	401,000	392	401,000
Philippines							169	168,631	16,370	10,342,173	16,539	10,510,804
Singapore			0.20	792			1,569	2,253,756	20,113	17,800,372	21,682	20,054,128
Thailand							500.00	210,020	1,210,568	658,980,783	1,211,068	659,190,803
Vietnam							2,997	2,166,538	759,870	405,655,392	762,867	407,821,930

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 59 FOB Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2023	576	576	576	576	576		576		576	576	576	576	947
	2024	576	576	576	576									969
Indonesia	2023	446	402	365	600	379	509	461	477	576	492	434	530	472
	2024	428	460	578	342									452
Lao PDR	2023	N/A												
	2024	343	346	425	380	345								
Myanmar	2023		879	943	844					752				854
	2024	879	877											878
Thailand	2023	693	659	665	618	625	599	590	574	572	548	582	592	610
	2024	569	561	527	498									539

Remark: N/A refers to data that is not available.

[63]

Table 60 CIF Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2023	666	670	685	679	667	647	626	623	638	637	599	571	642
	2024	572	571	553	528									556
Lao PDR	2023	383	416	572	518	688	720	581	703	366	450	388	584	531
	2024	468	446	563	413	508								480
Myanmar	2023	1,140	1,162	1,115	1,039	1,041	1,034	1,111	1,034	1,034		1,034	1,011	1,069
	2024	1,030												1,030
Singapore	2023	994	934	962	962	949	943	900	947	927	968	962	949	950
	2024	950	1,011	919	923	932	932	932	932	932	932	932	932	938
Vietnam	2023	672	717	677	651	613	583	575	582	600	604	667	596	628
	2024	575	559	516	499									537

Remark: N/A refers to data that is not available

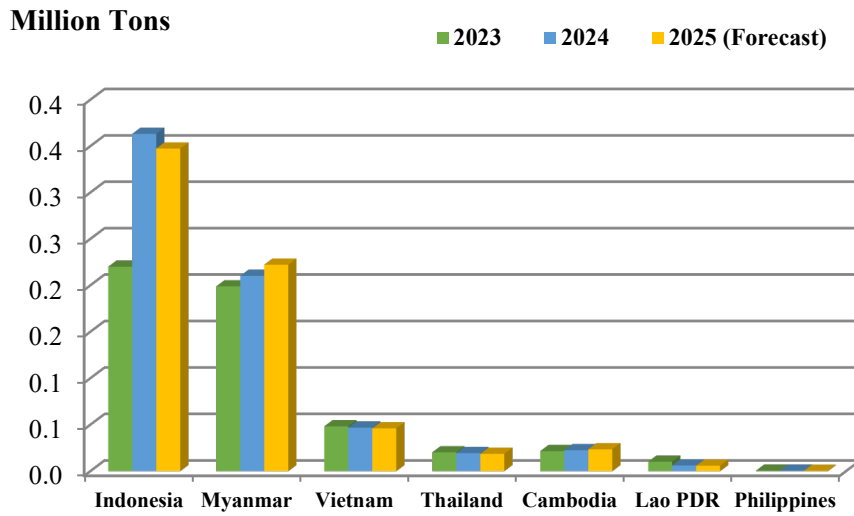


Figure 47 Soybean production of selected countries in ASEAN, 2023 – 2025

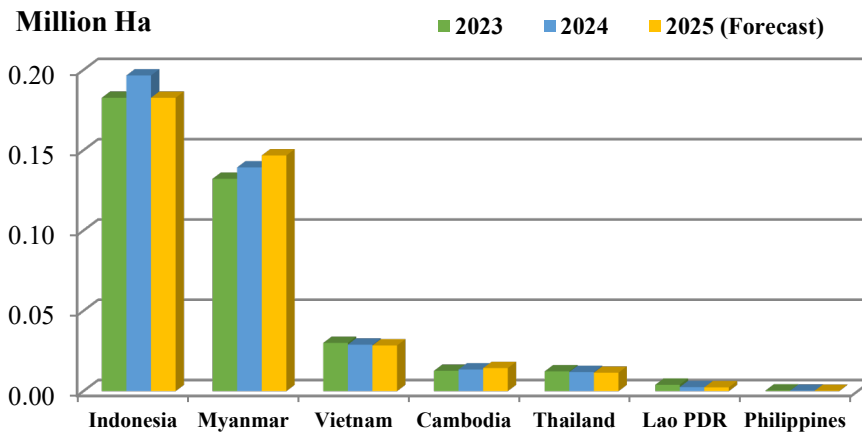


Figure 48 Soybean planted area of selected countries in ASEAN, 2023 – 2025

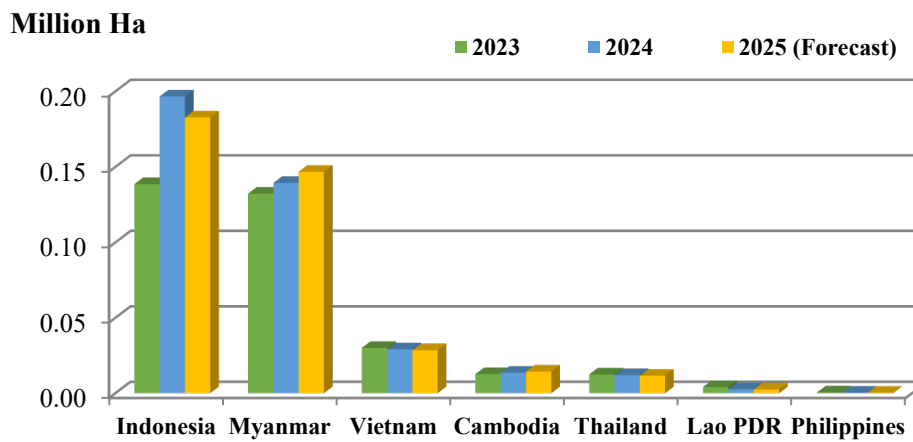


Figure 49 Soybean harvested area of selected countries in ASEAN, 2023 – 2025

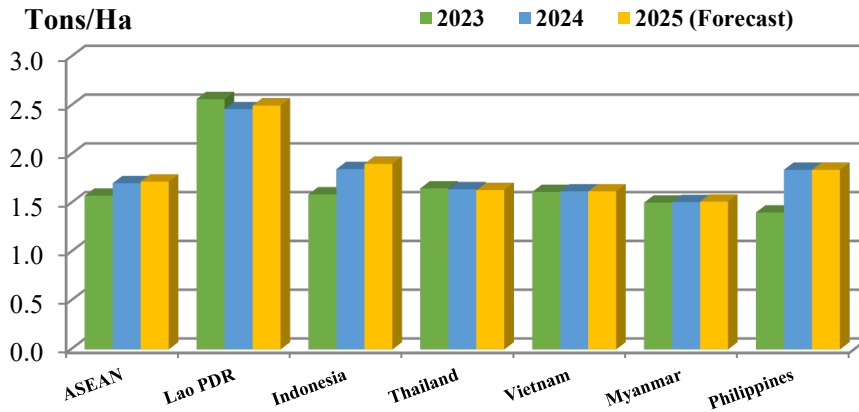


Figure 50 Soybean yield of countries in ASEAN, 2023 – 2025

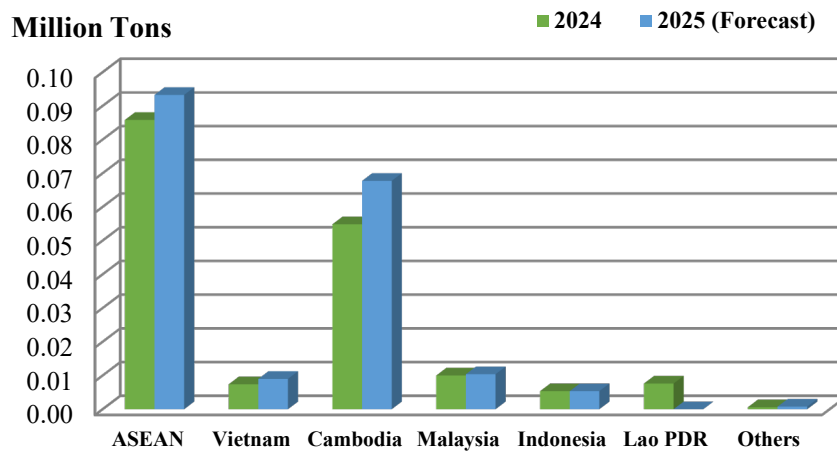
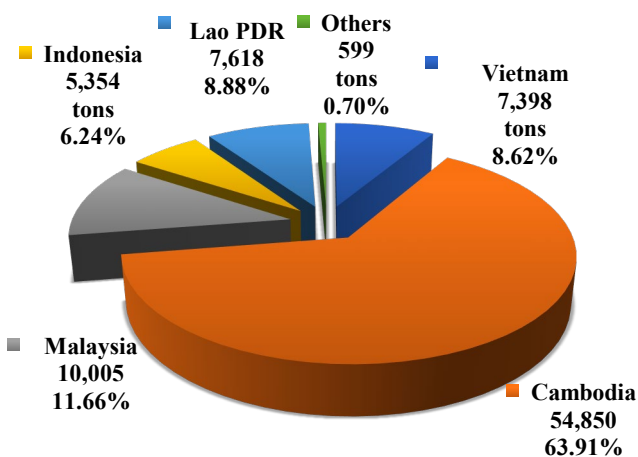
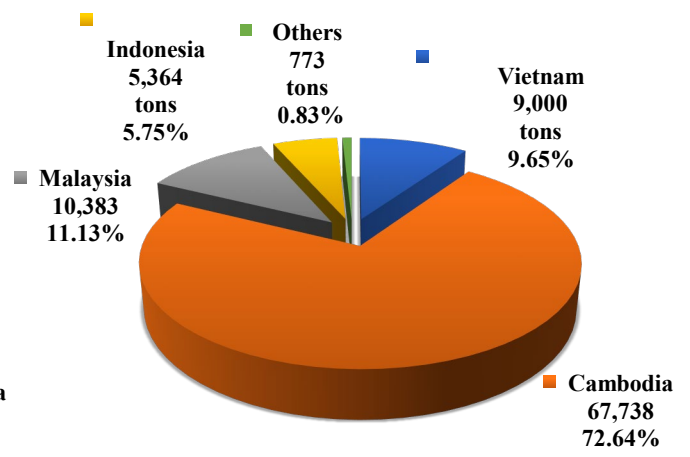


Figure 51 Amount of soybean export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 0.086 million tons

Figure 52 Share of soybean export (tons) among ASEAN countries, 2024



Total 0.093 million tons

Figure 53 Share of soybean export (tons) among ASEAN countries, 2025

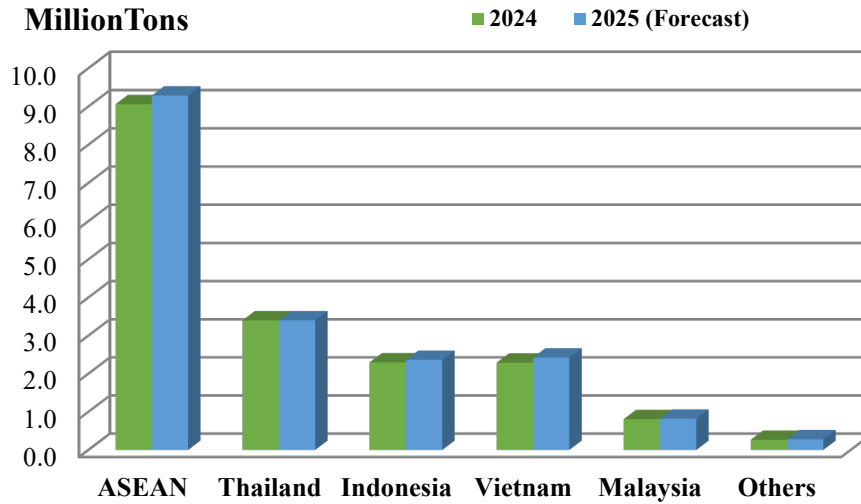
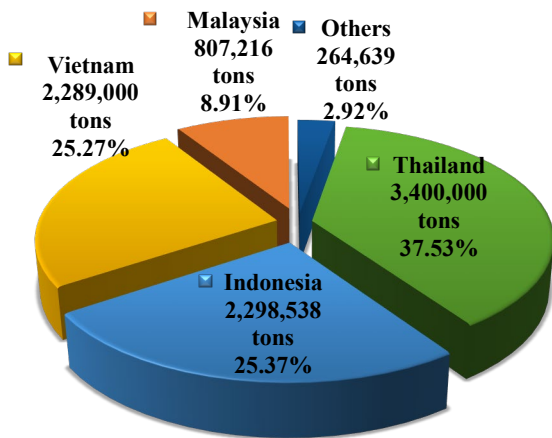
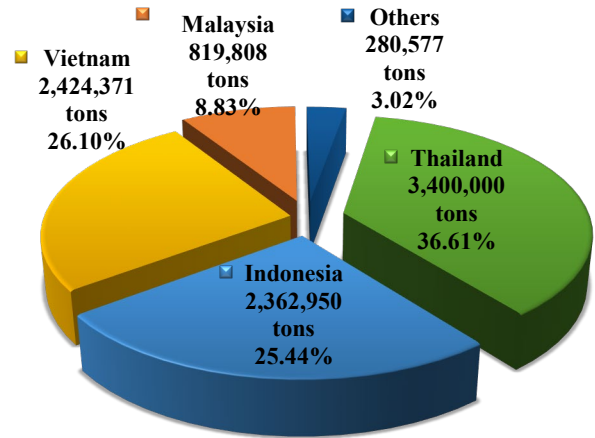


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 9.06 million tons

Figure 55 Share of soybean import (tons) among ASEAN countries, 2024



Total 9.29 million tons

Figure 56 Share of soybean import (tons) among ASEAN countries, 2025

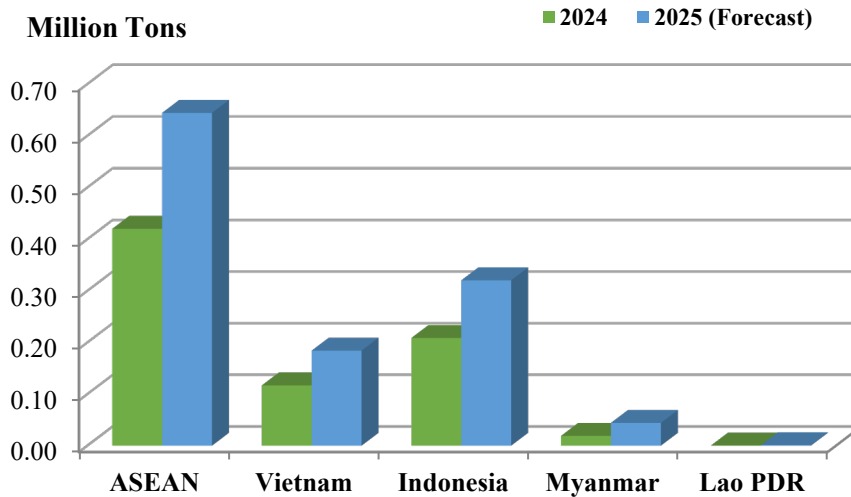


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2024 – 2025

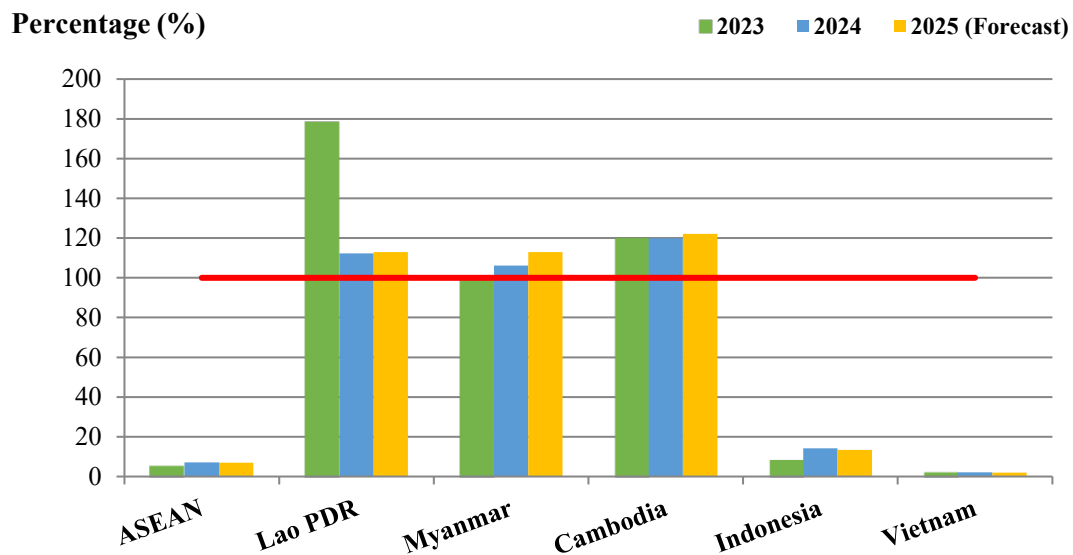


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2023 – 2025

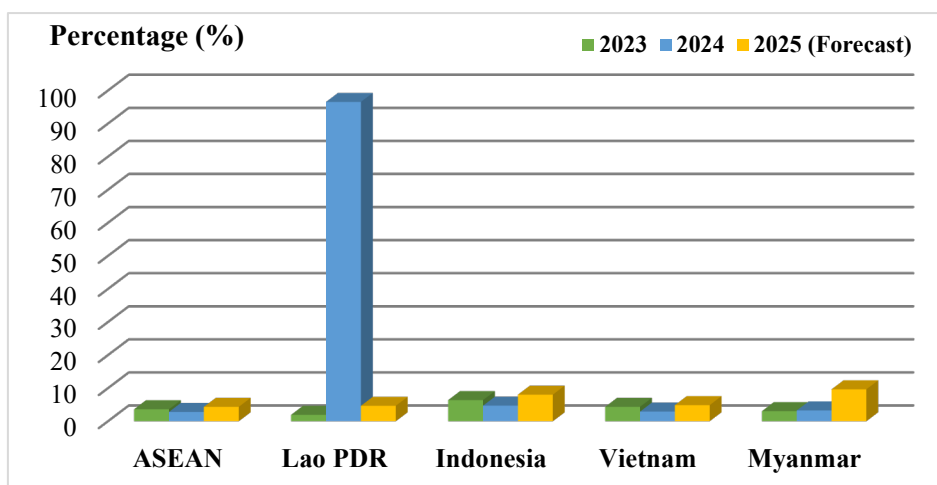


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

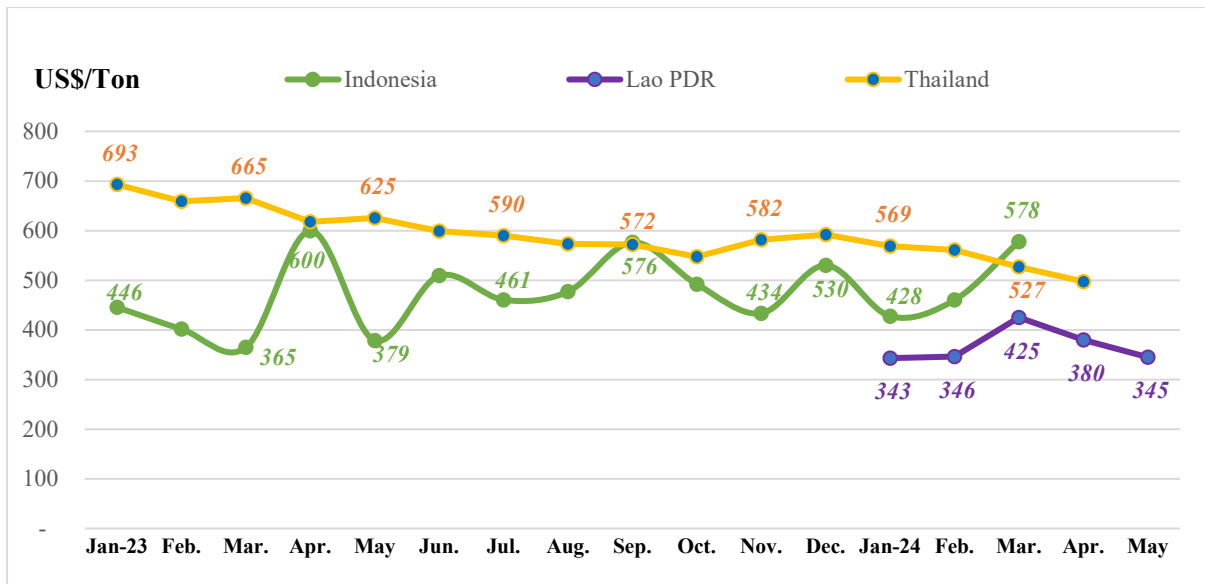


Figure 60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 2023 – 2024

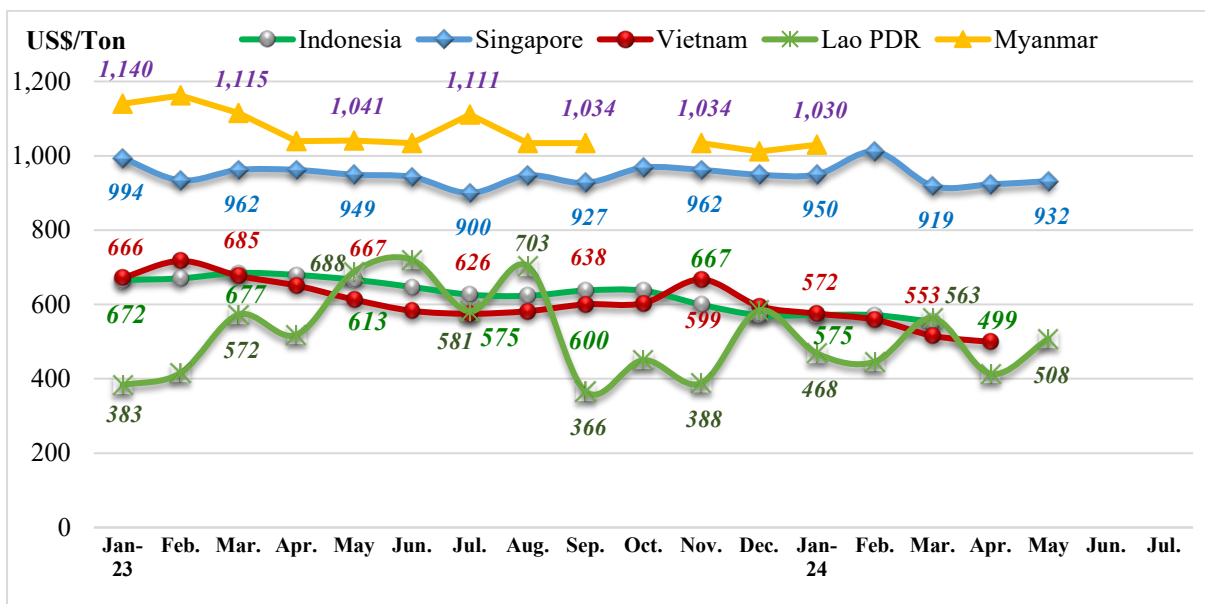


Figure 61 CIF price (US\$/Ton) of soybean of selected countries in ASEAN in 2023 – 2024

Cassava Outlook for 2025

Highlights

The forecast for the supply of ASEAN cassavas indicates an increase from 92.87 million tons in 2024 to 97.19 million tons in 2025, increasing 4.32 million tons or 4.65 percent (Table 61). This growth in supply of cassava from increases in beginning stock. The Beginning stock is estimated at 14.23 in 2025 which increase in 5.31 million tons or 59.53 percent from 8.92 million tons in 2024. The cassava production for 2025 is 74.32 million tons which decrease from 75.23 million tons in 2024. The import of cassava is forecasted to decrease by 0.08 million tons or 0.92 percents from 8.72 million tons in 2024 to 8.64 million tons in 2025.

The increase in demand of cassava is primarily attributed to exports and ending stock carried over from 2024. The exports are expected to increase by 0.64 million tons or 2.11 percent from 30.28 million tons in 2024 to 30.92 million tons in 2025. The ending stock is expected to increase by 4.65 million tons or 32.68 percent from 14.23 million tons in 2024 to 18.88 million tons in 2025. The domestic utilization is forecasted to decrease by 0.97 million tons or 2.01 percent from 48.36 million tons in 2024 to 47.39 million tons in 2025.

The production to domestic utilization ratio (self-sufficiency ratio) in 2025 is forecasted to be 156.85 percent, which is increased from 155.58 percent in 2024. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 30.03 percent in 2025, which increased from 18.45 percent.

Table 61 Summary of the ASEAN cassava situation, 2024 - 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	92.87	97.19	4.32	4.65
Beginning stock	8.92	14.23	5.31	59.53
Production	75.23	74.32	-0.91	-1.21
Import	8.72	8.64	-0.08	-0.92
Demand (Million tons)	92.87	97.19	4.32	4.65
Domestic utilization	48.36	47.39	-0.97	-2.01
Export	30.28	30.92	0.64	2.11
Ending stock	14.23	18.88	4.65	32.68
Ratio of production to domestic utilization (%)	155.58	156.85	1.27	-
Ratio of beginning stock to domestic utilization (%)	18.45	30.03	11.58	-

ASEAN Cassava Situation in 2024

► *Production*

In 2024 (crop year 2023/24), the estimated cassava production (root fresh) in ASEAN was 75.27 million tons, a decrease of 3.56 million tons or 4.52 percent from the 78.83 million tons recorded in 2023. A decrease in production is expected in Indonesia, Lao PDR, Philippines and Thailand. On the other hand, the increase in cassava production is anticipated in Brunei, Cambodia, Malaysia, Myanmar, and Vietnam. (Table 62-65 and Figure 62-65).

For **Brunei in 2024**, the increase in production was due to the increase in yield which resulted from farmers using better care practices.

For **Cambodia in 2024**, the decrease in production was due to the decrease in yield. The decrease in yield was a result of drought, pests, and diseases, while the increase in planted areas resulted from farmers responding to a price increase, a decrease in the price of competing crops, and government policy (The cassava policy).

For **Indonesia in 2024**, the decrease in production was attributed to the reduction in planted area. The decrease of planted area was affected by farmers responding to a price decrease, an increase in the price of competing crops and competition with other crops. Meanwhile, the increase in yield was caused by favorable weather and better crop care

For **Lao PDR in 2024**, the decrease in production was attributed to the reduction in yield. The decrease in yield was attributed to farmers using less fertilizer and a decrease in soil quality. Meanwhile, the increase in production was attributed to the increase in planted area affected by farmers responding to price increases and government policy.

For **Myanmar in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by favorable weather.

Similarly, the increase in yield was influenced by farmers taking care of their crops.

For **Philippines in 2024**, the decrease in production was due to the decrease in yield. The decrease in yield was due to cassava witches' broom disease and tuber rotting caused by frequent rainfall. However, the increase in planted areas resulted from a highly increase in consumption demand.

For **Thailand in 2024**, the decrease in production was due to the decrease in both planted area and yield. The decrease in planted areas was attributed to drought conditions and a shortage of cassava stem for planting due to the situation with rotten tubers. Similarly, the yield decreased due to drought, pests, and diseases.

For **Vietnam in 2024**, the increase in planted areas resulted from higher demand from either domestic or foreign markets.

► *Utilization and Stock*

In 2024, the estimated domestic utilization of cassava in ASEAN was 48.36 million tons, a decrease of 3.11 million tons or 6.05 percent from the 51.47 million tons in 2023 (Table 67-68). In 2024, the beginning stock of cassava was 8.92 million tons, an increase of 1.42 million tons or 18.89 percent from 7.50 million tons in 2023. The ending stock of cassava in 2024 was estimated to be 14.23 million tons, an increase of 5.31 million tons or 59.52 percent from the 8.92 million tons in 2023.

The cassava production in ASEAN is sufficient on demand within the region in 2024. The estimated ratio of production to domestic utilization (self-sufficiency ratio) increased to 155.58 percent in 2024, increase from 153.15 percent in 2023 (Table 70, Figure 73).

In 2024, the ratio of the ASEAN beginning stock to domestic utilization (food security ratio) is estimated to be 18.45 percent, up from 14.58 percent in 2023 (Table 71, Figure 74).

In 2024, the cassava industry has faced significant challenges. The supply decreased due to the impact of El Niño-induced droughts on domestic production. This situation was worsened by the spread of cassava mosaic disease and a shortage of stem cuttings for planting. However, demand from industries, particularly food processing and ethanol production has increased. This growth in demand was driven by the end of the pandemic, the reopening of economies, and subsequent economic recovery.

► *Trade*

The cassava exported from ASEAN in 2024 was expected to be 30.28 million tons, which decreased 4.36 million tons or

12.58 percents from 34.64 million tons in 2023. The cassava imported by ASEAN in 2024 was estimated to be 8.72 million tons, which increased by approximately 0.02 million tons or 0.19 percents from 8.70 million tons in 2023 (Table 67-68, Figure 66-67, and 69-70).

The quantity and value of cassava export by countries of destination and the quantity and value of cassava import by counties of origin are given in Table 72 and 73 respectively.

► *Prices*

Table 74 -75 provides insights into the FOB prices of cassava in Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Thailand, and Vietnam for the years 2023 and 2024, along with CIF prices in Indonesia, Malaysia, Myanmar, and Singapore.

Prospects for Cassava in 2025

► *Production*

The forecast for cassava production in ASEAN in 2025 anticipates a total of 74.32 million tons, a decrease of 0.94 million tons or approximately 1.26 percent from 75.27 million tons in 2024. A decrease in production is forecasted in Indonesia, Lao PDR, and Philippines. On the other hand, an increase in cassava production is expected in Brunei, Cambodia, Malaysia, Myanmar, Thailand, and Vietnam. (Table 62-65, Figure 62-65).

For **Brunei in 2025**, the increase in production was due to the increase in yield which resulted from farmers using better care practices.

For **Cambodia in 2025**, the increase in production was attributed to the rise in planted areas. This increase in planted area was driven by farmers responding to a price increase and favorable weather.

For **Indonesia in 2025**, the decrease in production is attributed to the reduction in planted area affected by farmers responding to price decreases and increasing in the price of competing crops. Meanwhile, the increase in yield is attributed to favorable weather and better crop care.

For **Lao PDR in 2025**, the decrease in production was attributed to a reduction in the planted area. This decline in planted areas was influenced by an increase in the price of competing crops.

For **Vietnam in 2025**, the increase in planted areas is attributed to higher demand from either domestic or foreign markets.

► *Utilization and Stock*

The forecast for the domestic utilization of cassava in 2025 anticipates a decrease to 47.39 million tons which decrease by 0.97 million tons or 2.01 percent, compared to 48.36 million tons in 2024. The beginning stock for 2025 is forecasted to increase to 14.23 million tons which increased by 5.31 million tons or 59.52 percent from the 8.92 million tons recorded in 2024. The ending stock for 2025 is expected to be 18.88 million tons, indicating an increase of 4.65 million tons or 32.70 percent from the 14.23 million tons reported in 2024 (Table 68-69).

The forecasted ratio of production to domestic utilization (self-sufficient ratio) for 2025 is expected to be 156.85 percent, showing a slight increase from 155.58 percent in 2024 (Table 70, Figure 73). Additionally, the projected ratio of beginning stock to domestic utilization (food security ratio) for 2025 is 30.03 percent, representing an increase from 18.45 percent in 2024. This indicates a strengthening cassava supply situation in 2025 (Table 71, Figure 74).

► *Trade*

The forecast for cassava exports from ASEAN in 2025 indicates an increase to 30.92 million tons, increasing by 0.64 million tons or 2.10 percent from 30.28 million tons in 2024. Conversely, imports are estimated to decrease to 8.64 million tons in 2025, decreasing by approximately 0.08 tons or 0.93 percent from 8.72 million tons in 2024 (Table 68-69, Figures 66, 68, 69, and 71).

Table 62 Cassava production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	78,832.04	75,269.02	-3,563.01	-4.52	74,321.81	-947.21	-1.26
Brunei	0.366	0.385	0.02	5.00	0.40	0.02	5.00
Cambodia	14,189.06	15,144.84	955.78	6.74	16,100.62	955.78	6.31
Indonesia	14,445.21	13,748.12	-697.09	-4.83	13,051.03	-697.09	-5.07
Lao PDR	6,255.41	6,124.00	-131.41	-2.10	3,600.00	-2,524.00	-41.21
Malaysia	36.63	*50.35	13.72	37.44	*54.64	4.29	8.53
Myanmar	262.68	366.11	103.43	39.38	*427.30	61.19	16.71
Philippines	2,595.49	*2,492.11	-103.37	-3.98	*2,414.58	-77.53	-3.11
Singapore	N/A						
Thailand	30,616.59	26,882.67	-3,733.92	-12.20	28,155.68	1,273.02	4.74
Vietnam	10,430.60	10,460.44	29.84	0.29	10,517.55	57.11	0.55

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 63 Cassava planted area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	3,890.22	3,716.01	-174.21	-4.48	3,611.56	-104.45	-2.81
Brunei	N/A						
Cambodia	705.46	752.98	47.52	6.74	800.50	47.52	6.31
Indonesia	499.77	437.09	-62.68	-12.54	374.41	-62.68	-14.34
Lao PDR	249.28	250.00	0.72	0.29	138.46	-111.54	-44.62
Malaysia	2.23	*2.90	0.67	29.84	*2.99	0.09	3.00
Myanmar	23.08	26.19	3.11	13.47	*29.72	3.53	13.47
Philippines	217.11	*231.10	13.99	6.44	*246.26	15.16	6.56
Singapore	N/A						
Thailand	1,681.79	1,502.79	-179.00	-10.64	1,503.46	0.67	0.04
Vietnam	511.50	512.96	1.46	0.29	515.76	2.80	0.55

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 64 Cassava harvested area in ASEAN countries, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	3,681.34	3,592.51	-88.83	-2.41	3,517.75	-74.77	-2.08
Brunei	N/A						
Cambodia	699.84	747.71	47.87	6.84	794.90	47.19	6.31
Indonesia	499.77	437.09	-62.68	-12.54	374.41	-62.68	-14.34
Lao PDR	249.28	250.00	0.72	0.29	138.46	-111.54	-44.62
Malaysia	2.08	*2.53	0.44	21.39	*2.60	0.08	3.00
Myanmar	18.89	22.04	3.16	16.70	*25.73	3.68	16.70
Philippines	*217.11	*231.10	13.99	6.44	*246.26	15.16	6.56
Singapore	N/A						
Thailand	1,482.87	1,389.08	-93.79	-6.33	1,419.62	30.55	2.20
Vietnam	511.50	512.96	1.46	0.29	515.76	2.80	0.55

Remark: * The value is estimated by AFSIS Secretariat. Brunei reported only production.

Table 65 Cassava yield in ASEAN countries, 2023 – 2025

Unit: Ton/Hectare

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	21.41	20.95	-0.46	-2.15	21.13	0.18	0.86
Brunei	N/A						
Cambodia	20.27	20.25	-0.02	-0.10	20.25	0.00	0.00
Indonesia	28.90	31.45	2.55	8.82	34.86	3.41	10.84
Lao PDR	25.09	24.50	-0.59	-2.35	26.00	1.50	6.12
Malaysia	17.61	*19.93	2.32	13.17	*21.01	1.08	5.42
Myanmar	13.91	16.61	2.70	19.41	*16.61	0.00	0.00
Philippines	11.95	*10.78	-1.17	-9.79	*9.80	-0.98	-9.09
Singapore	N/A						
Thailand	20.65	19.35	-1.30	-6.30	19.83	0.48	2.48
Vietnam	20.39	20.39	0.00	0.00	20.39	0.00	0.00

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.

Table 66 Cassava damaged area in ASEAN by cause of damage, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecify	Total
ASEAN	-	1,054	1,581	2,635	4,128	-	9,399
Brunei	-	-	-	-	-	-	-
Cambodia	-	1,054	1,581	2,635	-	-	5,271
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	4,128	-	4,128
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: N/A refers to data that is not available.

Table 67 Cassava balance sheet of ASEAN countries, 2023 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,504,028	78,832,035	8,701,015	95,037,078	51,472,807	34,643,065	8,921,207	95,037,078
Brunei	-	366	-	366	366	-	-	366
Cambodia	*5,291,135	14,189,060	-	19,480,195	8,740,017	*3,661,908	7,078,270	19,480,195
Indonesia	-	14,445,214	26,923	14,472,137	14,291,880	180,257	-	14,472,137
Lao PDR	633,441	6,255,410	30,013	6,918,864	6,742,809	143,230	32,824	6,918,864
Malaysia	-	36,633	1,349	37,982	36,805	1,177	-	37,982
Myanmar	*172,412	*262,679	*208	435,299	*385,010	1,414	48,875	435,299
Philippines	-	*2,595,485	*103,288	2,698,774	*2,697,325	*1,449	-	2,698,775
Singapore	-	-	1,623	1,623	1,620	3	-	1,623
Thailand	*1,147,675	30,616,586	8,200,000	39,964,261	11,100,000	27,700,000	1,164,261	39,964,261
Vietnam	259,366	10,430,600	337,611	11,027,576	7,476,974	2,953,626	596,976	11,027,576

Remark: * The value is estimated by AFSIS Secretariat.

Table 68 Cassava balance sheet of ASEAN countries, 2024 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	8,921,207	75,233,618	8,717,613	92,872,437	48,358,118	30,283,393	14,230,926	92,872,437
Brunei	-	384	-	384	384	-	-	384
Cambodia	7,078,270	15,144,839	-	22,223,109	9,163,001	*2,146,822	10,913,286	22,223,109
Indonesia	-	13,748,120	242,941	13,991,061	13,881,976	109,085	-	13,991,061
Lao PDR	32,824	6,124,000	2,880	6,159,704	4,004,485	316,505	1,838,714	6,159,704
Malaysia	-	50,350	2,465	52,815	52,489	326	-	52,815
Myanmar	48,875	366,110	78	415,064	*355,458	29,169	30,437	415,064
Philippines	-	*2,492,113	*130,000	2,622,113	*2,621,113	*1,000	-	2,622,113
Singapore	-	-	1,638	1,638	1,636	2	-	1,638
Thailand	1,164,261	26,877,100	8,000,000	36,041,361	10,700,000	*24,300,000	1,041,361	36,041,361
Vietnam	596,976	10,430,600	337,611	11,365,187	7,577,575	3,380,484	407,128	11,365,187

Remark: * The value is estimated by AFSIS Secretariat.

Table 69 Cassava balance sheet of ASEAN countries, 2025 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	14,230,926	74,321,813	8,636,928	97,189,667	47,385,345	30,919,806	18,884,516	97,189,667
Brunei	-	405	-	405	405	-	-	405
Cambodia	10,913,286	16,100,619	-	27,013,904	9,510,096	*2,404,441	15,099,367	27,013,904
Indonesia	-	13,051,026	121,901	13,172,927	13,010,681	162,246	-	13,172,927
Lao PDR	1,838,714	3,600,000	-	5,438,714	3,602,861	-	1,835,853	5,438,714
Malaysia	-	54,645	*4,502	59,148	59,058	*90	-	59,148
Myanmar	30,437	*427,303	-	457,741	361,986	-	95,755	457,741
Philippines	-	*2,4145,84	*160,000	2,574,584	2,573,884	*700	-	2,574,584
Singapore	-	-	1,631	1,631	1,629	2	-	1,631
Thailand	1,041,361	28,155,682	*8,000,000	37,197,043	10,700,000	*25,300,000	1,197,043	37,197,043
Vietnam	407,128	10,517,548	348,893	11,273,569	7,564,745	3,052,327	656,497	11,273,569

Remark: * The value is estimated by AFSIS Secretariat.

Table 70 Ratio of cassava production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	78,832,035	51,472,807	153.15	75,233,618	48,358,118	155.58	74,321,813	47,385,345	156.85
Brunei	366	366	100.00	384	384	100.00	405	405	100.02
Cambodia	14,189,060	8,740,017	162.35	15,144,839	9,163,001	165.28	16,100,619	9,510,096	169.30
Indonesia	14,445,214	14,291,880	101.07	13,748,120	13,881,976	99.04	13,051,026	13,010,681	100.31
Lao PDR	6,255,410	6,742,809	92.77	6,124,000	4,004,485	152.93	3,600,000	3,602,861	99.92
Malaysia	36,633	36,805	99.53	50,350	52,489	95.93	54,645.04	59,058	92.53
Myanmar	262,679	385,010	68.23	366,110	355,458	103.00	427,304	361,986	118.04
Philippines	2,595,486	2,697,325	96.22	2,492,113	2,621,113	95.08	2,414,584	2,573,884	93.81
Singapore	-	1,620	0.00	-	1,636	0.00	-	1,629	0.00
Thailand	30,616,586	11,100,000	275.83	26,877,100	10,700,000	251.19	28,155,682	10,700,000	263.14
Vietnam	10,430,600	7,476,974	139.50	10,430,600	7,577,575	137.65	10,517,548	7,564,745	139.03

Remark: * The value is estimated by AFSIS Secretariat.

Table 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	7,504,028	51,472,807	14.58	8,921,207	48,358,118	18.45	14,230,926	47,385,345	30.03
Brunei	-	366	0.00	-	384	0.00	-	405	0.00
Cambodia	5,291,135	8,740,017	60.54	7,078,270	9,163,001	77.25	10,913,286	9,510,096	114.75
Indonesia	-	14,291,880	0.00	-	13,881,976	0.00	-	13,010,681	-
Lao PDR	633,441	6,742,809	9.39	32,824	4,004,485	0.82	1,838,714	3,602,861	51.03
Malaysia	-	36,805	0.00	-	52,489	0.00	-	59,058	-
Myanmar	172,412	385,010	44.78	48,875	355,458	13.75	30,437	361,986	8.41
Philippines	-	2,697,325	0.00	-	2,621,113	0.00	0	2,573,884	-
Singapore	-	1,620	0.00	-	1,636	0.00	-	1,629	-
Thailand	1,147,675	11,100,000	10.34	1,164,261	10,700,000	10.88	1,041,361	10,700,000	9.73
Vietnam	259,366	7,476,974	3.47	596,976	7,577,575	7.88	407,128	7,564,745	5.38

Remark: * The value is estimated by AFSIS Secretariat.

Table 72 Quantity and Value of Cassava Export by Countries of Destination in 2024

Quantity: Tons, Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia														
Indonesia	3.00	9,216							2,471.99	1,095,499			258	87,904
Lao PDR														
Malaysia														
Myanmar											75	26,000		
Philippines														
Singapore	N/A													
Thailand	178	129,805	1,062	956,462	208,912	123,373,614	15,126	8,435,740	73,607	43,363,456	3,313	2,076,057	53,080	34,382,980
Vietnam									7,058	3,737,731			9,443	4,926,413

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia			1,298,000	333,048,325	770,600	247,966,600	2,068,600	581,014,925	78,222	22,886,964	2,146,822	603,901,889
Indonesia			4.90	4,971			2,737	1,197,590	3,775	3,239,054	6,513	4,436,644
Lao PDR			114,740	20,622,649	40,399	10,960,814	155,139	31,583,463	161,366	64,797,785	316,505	96,381,248
Malaysia	324	114,002					324	114,002	1.54	12,580	326	126,582
Myanmar			29,094	4,268,000			29,169	4,294,000			29,169	4,294,000
Philippines	4.58	6,790					5	6,790	570	593,875	575	600,665
Singapore	N/A											
Thailand	24,797	14,386,284			11,176	9,841,190	391,251	236,945,587	2,045,384	958,658,245	2,436,634	1,195,603,832
Vietnam							16,501	8,664,144	1,110,327	501,654,063	1,126,828	510,318,207

Remark: The data in this table is obtained from national focal points of member. N/A refers to data that is not available.

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Table 73 Quantity and Value of Cassava Import by Countries of Origin in 2024

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia														
Lao PDR														
Malaysia			52	21,770	16	11,390								
Myanmar														
Philippines					3.65	2,678								
Singapore					2.40	7,914			1,567	2,244,612	0.20	438		
Thailand			1,228,743	134,432,960	126	205,580	1,902,311	319,671,621	14	40,888	25,759	4,186,836		
Vietnam				116,311				34,190,548						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.001	7.00	142,321	78,608,313	17,310	9,026,030	159,632	87,634,350	3.32	14,792	159,635	87,649,142
Lao PDR			2,880	1,304,425			2,880	1,304,425			2,880	1,304,425
Malaysia					178	92,878	245	126,038	2,219	2,499,532	2,465	2,625,569
Myanmar			78	213,000			78	213,000			78	213,000
Philippines							4	2,678	2.60	9,146	6	11,824
Singapore			0.20	792			1,569	2,253,756			1,569	2,253,756
Thailand	1.13	342,249			1,181	1,018,894	3,158,133	459,899,027	5,525	15,997,022	3,163,658	475,896,049
Vietnam				739,029			-	35,045,888		630,146	-	35,676,034

Remark: The data in this table is obtained from national focal points of member. N/A refers to data that is not available

Table 74 FOB Price of Cassava in selected ASEAN countries

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average	
Cambodia	Starch	2023	595	595	595	595	595	595	595	595	595	595	595	595	595	595
		2024	585	580	575	565	555	580	575							574
	Shredded	2023	230	230	230	225	235	235	230	230	231	231	231	231	231	231
		2024	231	231	231	231	231									231
	Pellets	2023	145	145	145	145	145	145	145	145	145	145	145	145	145	145
		2024	145	145	145	145	145									145
Indonesia	Not specified	2023	2,087	2,201	1,914	1,264	2,827	2,457	2,218	2,207	1,896	1,965	1,978	2,008	2,085	
		2024	1,938	1,844	1,423	1,867									1,768	
Lao PDR	Cassava flour	2023	350	250	350	470	572	597	550	446	433	496	530	490	461	
		2024	403	344	356	480	459								408	
	Cassava shredded	2023	140	144	141	251	341	374	232	148	151	225	162	266	214	
		2024	159	162	195	182	144								169	
Malaysia	Not specified	2023	271	289	253	336	344	306	342	291	296	303	1,762	298	425	
		2024	270	435	392	554									413	
Myanmar	Cassava flour	2023	133	144	138	138	140	203		348	400	333		400	238	
		2024	333	150	147	147									194	
Thailand	Starch	2023	492	515	528	541	558	563	563	563	565	567	569	580	550	
		2024	576	573	573	568	551	548							564	
	Pellets	2023	289	280	279	279	287	376	390	367	365	354	392	352	334	
		2024	357	359	301	358									344	
	Shredded	2023	268	275	274	270	269	263	265	272	277	282	278	271	272	
		2024	257	250	252	240	230	230							243	
Vietnam	Not specified	2023	391	376	382	400	415	463	495	467	468	509	501	493	446	
		2024	463	444	451	440									449	

Remark: N/A refers to data that is not available.

Table 75 CIF Price of Cassava in selected ASEAN countries

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2023	1,000	272											636
		2024			299	295									297
Malaysia	Not specified	2023	647	921	910	425	390	414	833	932	1,191	443	395	402	658
		2024	992	1,207	1,098	1,108									1,101
Myanmar	Cassava flour	2023		600		2,903					2,903	667			1,768
		2024	2,903												2,903
Singapore	Not specified	2023	358	349	393	400	387	334	460	417	390	382	334	359	380
		2024	371	334	360	369	339	439	821	821	821	821	821	821	595

Remark: N/A refers to data that is not available.

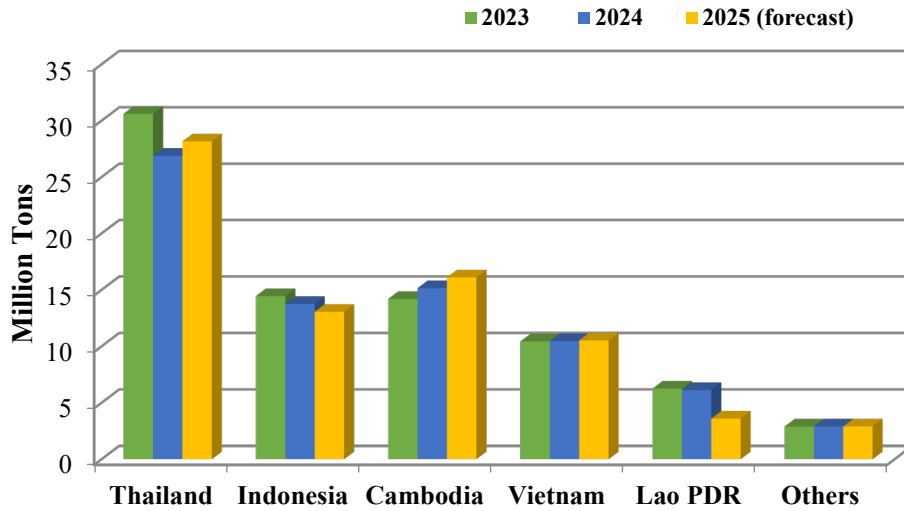


Figure 62 Cassava production of selected countries in ASEAN, 2023 – 2025

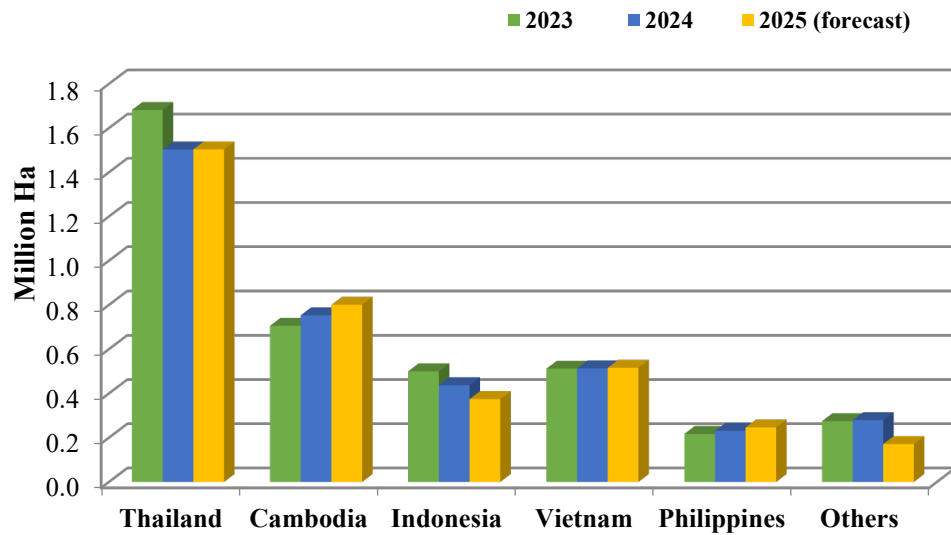


Figure 63 Cassava planted area of selected countries in ASEAN, 2023 – 2025

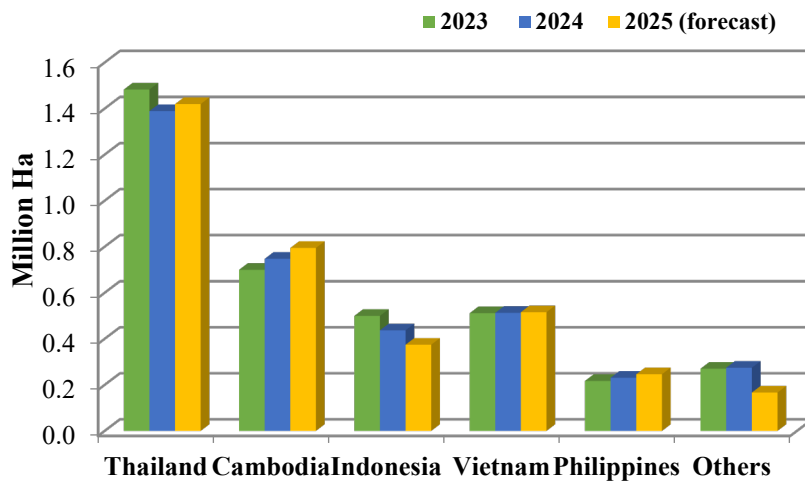


Figure 64 Cassava harvested area of selected countries in ASEAN, 2023 – 2025

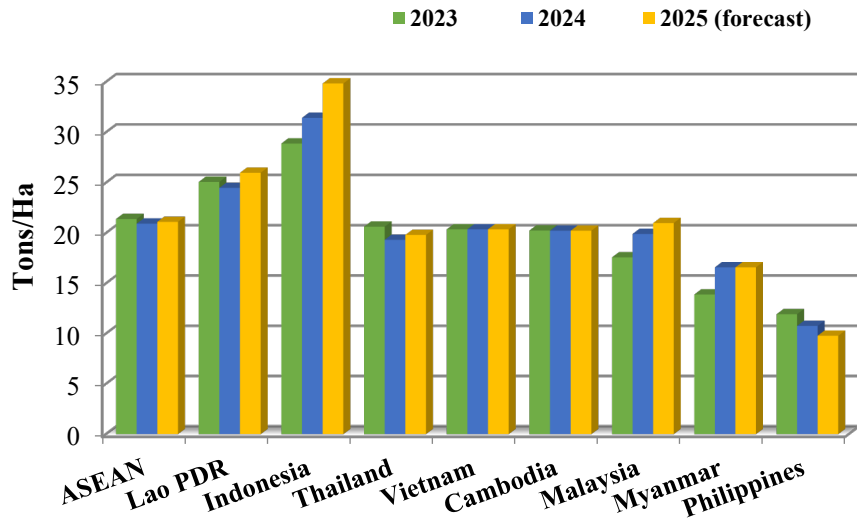


Figure 65 Cassava yield of countries in ASEAN, 2023 – 2025

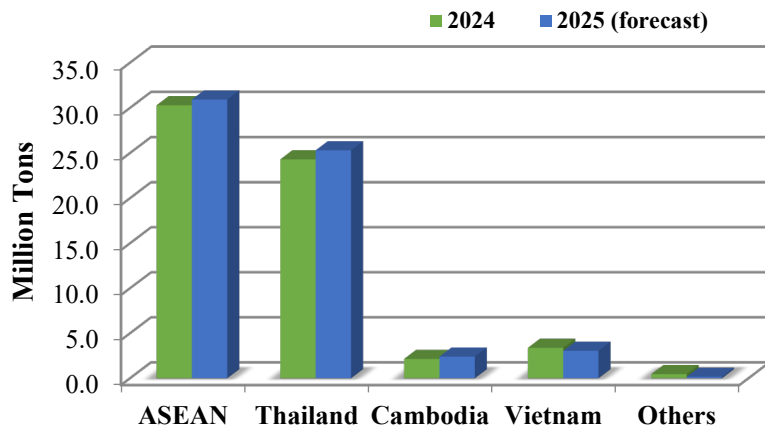
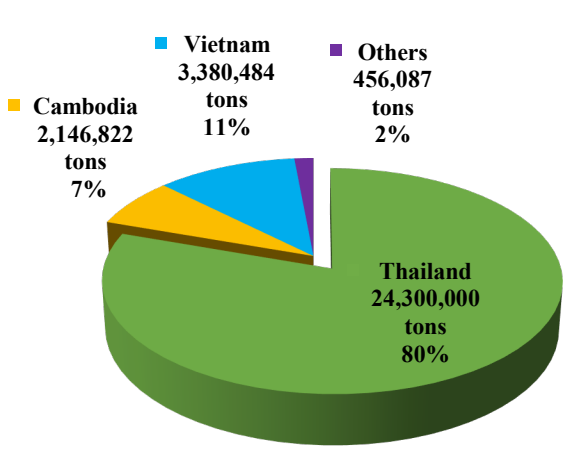
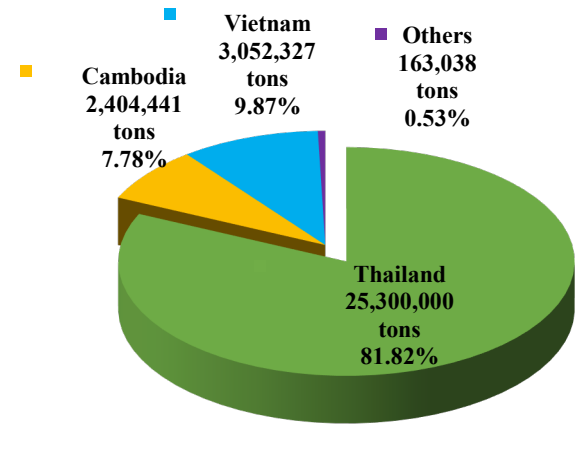


Figure 66 Amount of cassava export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 30.28 Million Tons

Figure 67 Share of cassava export (tons) among ASEAN countries, 2024



Total 30.92 Million Tons

Figure 68 Share of cassava export (tons) among ASEAN countries, 2025

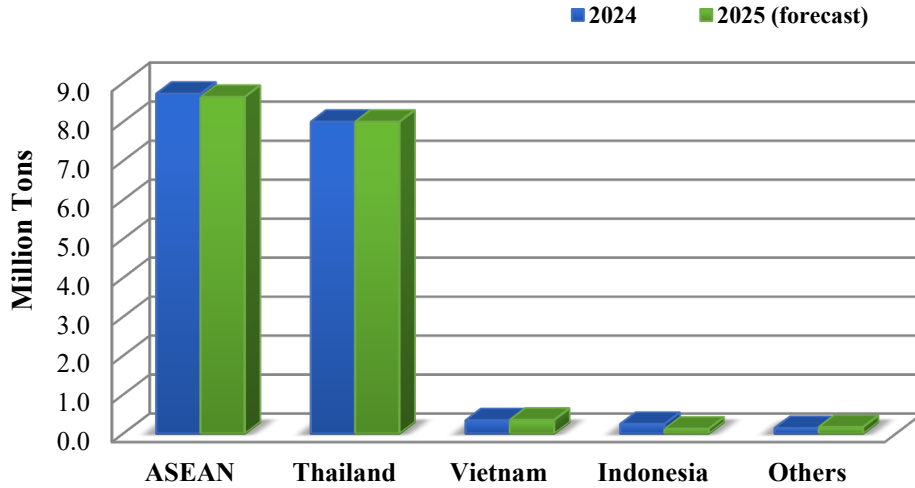
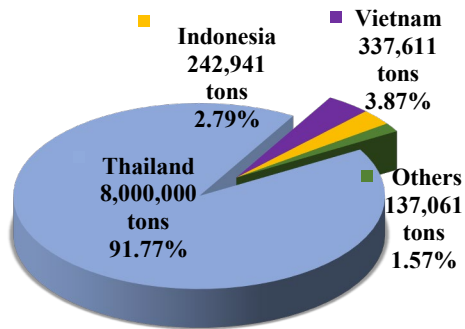
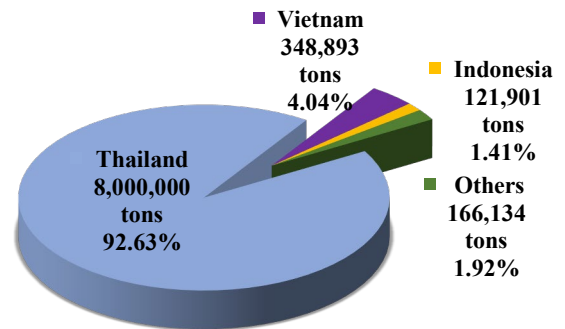


Figure 69 Amount of cassava import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 8.71 Million Tons

Figure 70 Share of cassava import (tons) among ASEAN countries, 2024



Total 8.63 Million Tons

Figure 71 Share of cassava import (tons) among ASEAN countries, 2025

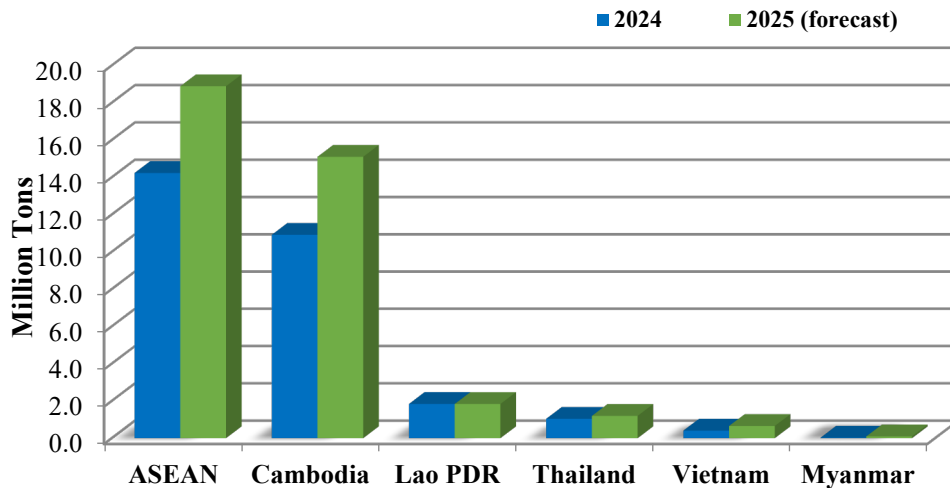


Figure 72 Amount of ending stock of cassava in ASEAN countries in 2024 – 2025

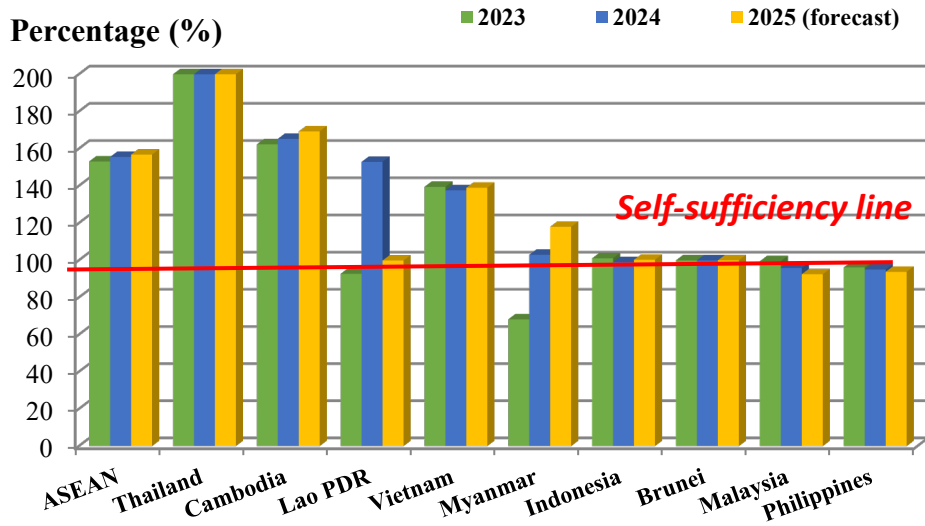


Figure 73 Ratio of cassava production to domestic utilization in ASEAN countries, 2023 – 2025

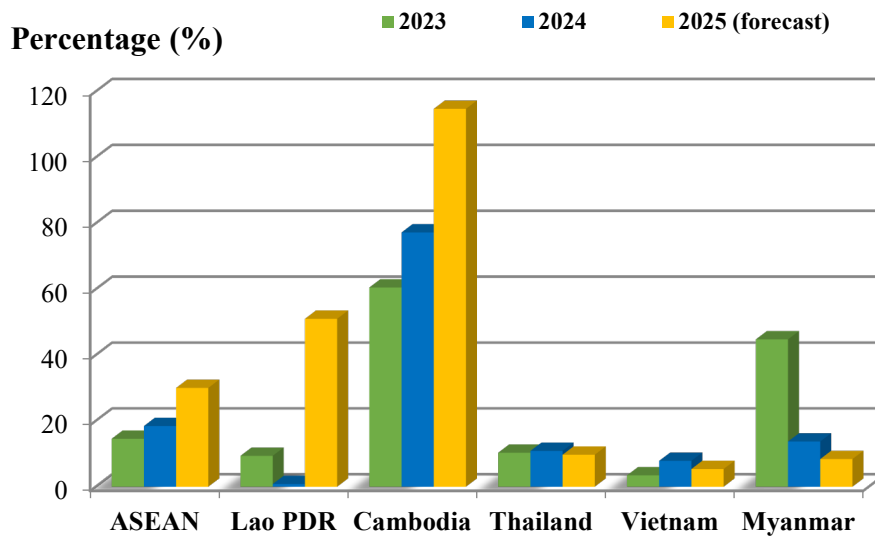


Figure 74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

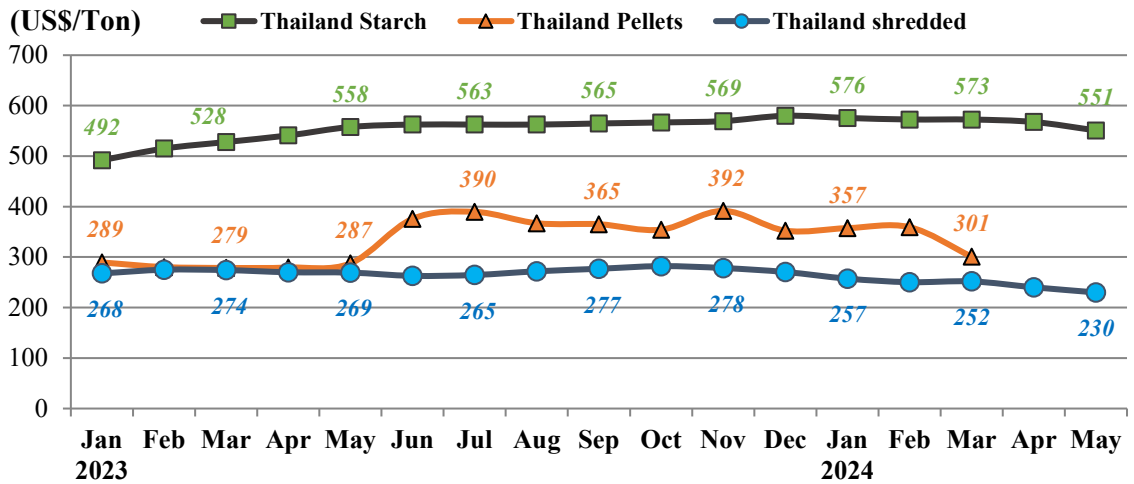


Figure 75 FOB price (US\$/Ton) of cassava of Thailand in 2023 – 2024

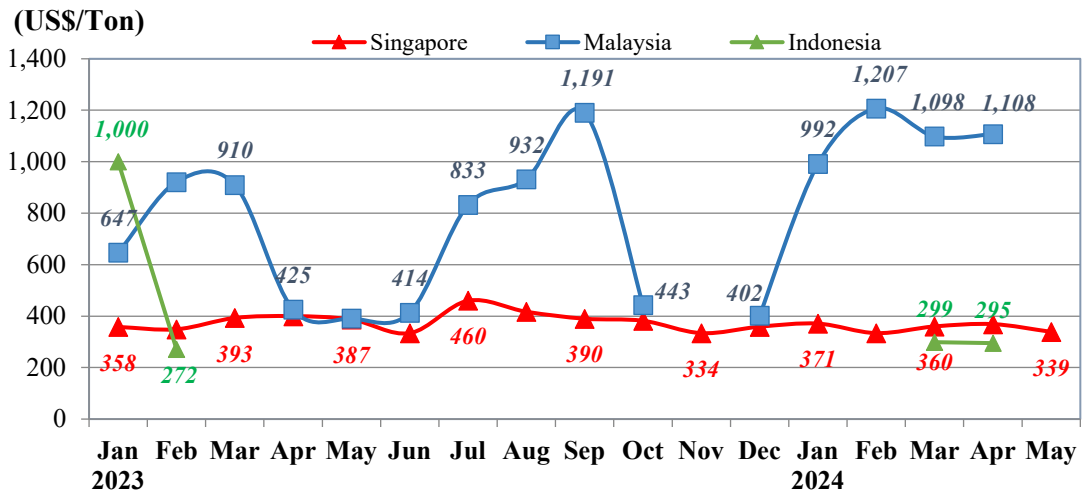


Figure 76 CIF price (US\$/Ton) of cassava selected countries in ASEAN in 2023 - 2024

Explanatory Notes Production of Paddy for 2024

▶ **Brunei:**

- Wet season refers to the crop harvested during January to June 2024.
- Dry season refers to the crop harvested during July to December 2024.

▶ **Cambodia:**

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Indonesia:**

- Wet season refers to the crop harvested during September 2023 to April 2024.
- Dry season refers to the crop harvested during May to August 2024.

▶ **Lao PDR:**

- Wet season refers to the crop harvested during September to December 2024.
- Dry season refers to the crop harvested during April to June 2024.

▶ **Malaysia:**

- Wet season refers to the crop harvested during August 2023 to February 2024.
- Dry season refers to the crop harvested during February to July 2024.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2023 to February 2024.
- Dry season refers to the crop harvested during February to April 2024.

▶ **Philippines:**

- Wet season refers to the crop harvested during July to December 2023.
- Dry season refers to the crop harvested during January to March 2024.

▶ **Thailand:**

- Wet season refers to the crop harvested during July 2023 to May 2024.
- Dry season refers to the crop harvested during February to October 2024.

▶ **Vietnam:**

❖ **Spring-season**

- North refers to the crop harvested during May to July 2024.
- South refers to the crop harvested during March to June 2024.

❖ **Autumn-season**

- North refers to the crop harvested during August to October 2024.
- South refers to the crop harvested during July to September 2024.

❖ **Winter-season**

- North refers to the crop harvested during October to November 2024.
- South refers to the crop harvested during October to December 2024.



Production of Maize for 2024

▶ Brunei:

- Wet season refers to the crop harvested during January to June 2024.
- Dry season refers to the crop harvested during July to December 2024.

▶ Cambodia:

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during February to March 2024.

▶ Indonesia:

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ Lao PDR:

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during February to May 2024.

▶ Myanmar:

- Wet season refers to the crop harvested during August 2023 to March 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ Philippines:

- Wet season refers to the crop harvested during August to December 2023.
- Dry season refers to the crop harvested during January to March 2024.

▶ Thailand:

- Wet season refers to the crop harvested during July to December 2024.
- Dry season refers to the crop harvested during February to May 2024.

▶ Vietnam:

- 1st crop harvested during March to June 2024.
- 2nd crop harvested during October to November 2024.



Production of Sugarcane for 2024

▶ **Brunei:**

- The crop harvested during January to December 2024.

▶ **Cambodia:**

- The crop harvested during October to December 2023.

▶ **Indonesia:**

- The crop harvested during September 2023 to November 2024.

▶ **Lao PDR:**

- The crop harvested during January to May 2024.

▶ **Myanmar:**

- The crop harvested during October 2023 to March 2024.

▶ **Philippines:**

- The crop harvested during October 2023 to February 2024.

▶ **Thailand:**

- The crop harvested during December 2023 to April 2024.

▶ **Vietnam:**

- The crop harvested during November 2023 to May 2024.



Production of Soybean for 2024

▶ **Cambodia:**

- The crop harvested during January to February 2024.

▶ **Indonesia:**

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ **Lao PDR:**

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2023 to March 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Philippines:**

- Wet season refers to the crop harvested during August to December 2023.
- Dry season refers to the crop harvested during January to June 2024.

▶ **Thailand:**

- Wet season refers to the crop harvested during September to December 2023.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Vietnam:**

- Wet season refers to the crop harvested during February to May 2024.
- Dry season refers to the crop harvested during August to November 2024.



Production of Cassava for 2024

▶ Brunei:

- The crop harvested during January to December 2024.

▶ Cambodia:

- The crop harvested during January to February 2024.

▶ Indonesia:

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ Lao PDR:

- The crop harvested during December 2023 to March 2024.

▶ Malaysia:

- The crop harvested during October 2023 to December 2024.

▶ Myanmar:

- The crop harvested during September 2023 to June 2024.

▶ Philippines:

- 1st crop harvested during September to December 2023.
- 2nd crop harvested during January to June 2024.

▶ Thailand:

- The crop harvested during October 2023 to September 2024.

▶ Vietnam:

- Wet season refers to the crop harvested during September to October 2024.
- Dry season refers to the crop harvested during January to March 2024.

Domestic Utilization, Stock, Import and Export: refer to calendar year

N/A: The data is not available due to no collecting or reporting systems in the country yet.

nil: Small amount



Milling Rate of Rice (2024)

Unit: Tons

Country	Paddy	Rice
ASEAN	1	0.65
Brunei	1	0.65
Cambodia	1	0.64
Indonesia	1	0.64
Lao PDR	1	0.60
Malaysia	1	0.64
Myanmar	1	0.63
Philippines	1	0.67
Thailand	1	0.65
Vietnam	1	0.65

Extraction rate of Sugar (2024)

Unit: Tons

Country	Sugarcane	Sugar
ASEAN	1,000	97.15
Cambodia	1,000	100.00
Indonesia	1,000	69.13
Lao PDR	1,000	200.00
Myanmar	1,000	79.94
Philippines	1,000	107.26
Thailand	1,000	106.85
Vietnam	1,000	100.00



ANNEX 1

Rice crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.32 report

Country		2023						2024												2025	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet season																				
	Dry season																				
Cambodia	Wet season																				
	Dry season																				
Indonesia	Wet season																				
	Dry season																				
Lao PDR	Wet season																				
	Dry season																				
Malaysia	Wet season																				
	Dry season																				
Myanmar	Wet season																				
	Dry season																				
Philippines	Wet season																				
	Dry season																				
Thailand	Wet season																				
	Dry season																				
Vietnam	Spring_North																				
	Spring_South																				
	Autumn_North																				
	Autumn_South																				
	Winter_North																				
	Winter_South																				

ANNEX 2

Maize crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.32 report

Country	Crop	2023						2024												2025		
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	
Brunei	Wet season																					
	Dry season																					
Cambodia	Wet season																					
	Dry season																					
Indonesia	1st																					
	2nd																					
	3rd																					
Lao PDR	Wet season																					
	Dry season																					
Myanmar	Wet season																					
	Dry season																					
Philippines	Wet season																					
	Dry season																					
Thailand	Wet season																					
	Dry season																					
Vietnam	1st																					
	2nd																					

ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.32 report

Country	2023				2024											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei																
Cambodia																
Indonesia																
Lao PDR																
Myanmar																
Philippines																
Thailand																
Vietnam																

ANNEX 4

Soybean crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.32 report

Country	Crop	2023					2024											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cambodia																		
Indonesia	1st																	
	2nd																	
	3rd																	
Lao PDR	Wet season																	
	Dry season																	
Myanmar	Wet season																	
	Dry season																	
Philippines	Wet season																	
	Dry season																	
Thailand	Wet season																	
	Dry season																	
Vietnam	Wet season																	
	Dry season																	

ANNEX 5

Cassava crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.32 report

Country	Crop	2023				2024											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei																	
Cambodia																	
Indonesia	1st																
	2nd																
	3rd																
Lao PDR																	
Malaysia																	
Myanmar																	
Philippines	1st																
	2nd																
Thailand																	
Vietnam	North																
	South																



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