



ASEAN Food Security Information System

Agricultural Commodity Outlook (ACO) Report

No. 34 – June 2025

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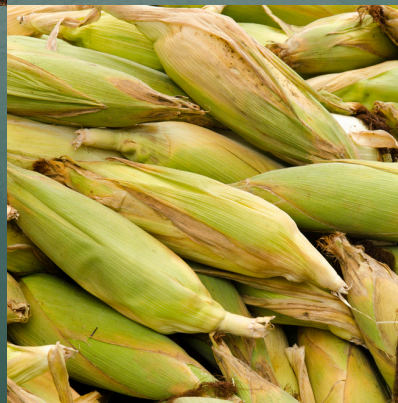
AFSIS Secretariat

Office of Agricultural Economics (OAE)

Ministry of Agriculture and Cooperatives

Bangkok, Thailand

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Report on

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I extend my heartfelt gratitude to all AFSIS Focal Points and their dedicated staff for their unwavering support and invaluable contributions in providing the essential data analyzed in this ACO report No. 34. My sincere thanks to Mr. Charapon Chantorn and Mr. Prachaya Chamarat for their meticulous preparation of ACO forms, data collection from member countries, rigorous analysis, and the creation of this comprehensive report. The timely release of ACO report No. 34 is a testament to the significant contributions, admirable efforts, and hard work of all member countries involved.

This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 34, along with its predecessors, stands as a valuable resource benefiting all ASEAN members, policymakers, 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.

I am deeply thankful to the Office of Agricultural Economics, Ministry of Agriculture and Cooperatives, Thailand, for their continuous support. Their provision of office space, dedicated staff, and financial assistance has played a vital role in the seamless execution of all AFSIS activities.

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Thank you

A handwritten signature in blue ink, appearing to read 'Sumanya' with a stylized flourish at the end.

Dr. Sumanya Ngandee
Computer Technical Officer,
Senior Professional Level,
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 preview of the 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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Explanatory Notes

Production of Paddy for 2025 (crop year 2024/25)

Brunei Darussalam

- Wet season refers to the crop harvested during January to May 2025.
- Dry season refers to the crop harvested during July to November 2025.

Cambodia

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to April 2025.

Indonesia

- Wet season refers to the crop harvested during September 2024 to February 2025.
- Dry season refers to the crop harvested during May to August 2025.

Lao PDR

- Wet season refers to the crop harvested during September to December 2024.
- Dry season refers to the crop harvested during March to May 2025.

Malaysia

- Wet season refers to the crop harvested during September 2024 to February 2025.
- Dry season refers to the crop harvested during March to August 2025.

Myanmar

- Wet season refers to the crop harvested during August 2024 to February 2025.
- Dry season refers to the crop harvested during February to April 2025.

The Philippines

- Wet season refers to the crop harvested during July to December 2024.
- Dry season refers to the crop harvested during January to March 2025.

Thailand

- Wet season refers to the crop harvested during July 2024 to May 2025.
- Dry season refers to the crop harvested during February to September 2024.

Vietnam

- **Spring season**
 - North region refers to the crop harvested during May to July 2025.
 - South region refers to the crop harvested during February to May 2025.
- **Autumn season**
 - North region refers to the crop harvested during August to October 2025.
 - South region refers to the crop harvested during July to September 2025.
- **Winter season**
 - North region refers to the crop harvested during October to November 2025.
 - South region refers to the crop harvested during October to December 2025.

Rice Outlook for 2026

Highlights

The forecast for rice supply in ASEAN predicts to rise 12.98 million tons or 7.07 percent from 183.48 million tons in 2025 to 196.46 million tons in 2026 of milled rice (Table 1). This increase in supply is primarily attributed to the production, import, and beginning stock carried over from the previous year. The beginning stock is forecast to increase by 10.79 million tons or 26.54 percent, increasing from 40.65 million tons in 2025 to 51.44 million tons in 2026. The rice production in 2026 is forecasted to be 130.58 million tons, increasing from 129.84 million tons in 2025, or 0.74 million tons increase. Moreover, the import is forecast to increase by 1.46 million tons, or 11.25 percent, from 12.98 million tons in 2025 to 14.44 million tons in 2026.

The demand of rice is primarily attributed to the ending stock. The domestic utilization is forecast to slightly decrease by 0.64 million tons, or 0.58 percent, from 110.33 million tons in 2025 to 109.69 million tons in 2026. The rice export is expected to decrease 0.58 million tons or 2.67 percent from 21.71 million tons in 2025 to 21.13 million tons in 2026. On the other hand, the ending stock is expected to increase 14.21 million tons, or 27.62 percent, from 51.44 million tons in 2025 to 65.65 million tons in 2026.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2026 is expected to be 119.05 percent. Additionally, the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 46.90 percent in 2026 (Table 1).

Table 1. Summary of the ASEAN rice situation in 2025-2026 (milled rice)

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	183.48	196.46	12.98	7.07
• Beginning stock	40.65	51.44	10.79	26.54
• Production	129.84	130.58	0.74	0.57
• Import	12.98	14.44	1.46	11.25
Demand (Million tons)	183.48	196.46	12.98	7.07
• Domestic utilization	110.33	109.69	-0.64	-0.58
• Export	21.71	21.13	-0.58	-2.67
• Ending stock	51.44	65.65	14.21	27.62
Ratio of production to domestic utilization (%)	117.69	119.05	1.36	-
Ratio of beginning stock to domestic utilization (%)	36.85	46.90	10.05	-

ASEAN Rice Situation in 2025

Production

The estimated paddy production of ASEAN in 2025 (crop year 2024/25) reports at 201.33 million tons, marking a growth of 875.20 million tons, or 0.44 percent, compared to the 200.45 million tons recorded in 2024 (crop year 2023/24). This increase is attributed to an increase in yield of 0.05 ton/hectare, or 1.14 percent, from 4.39 ton/hectare in 2024 to 4.44 ton/hectare in 2025. The increase in production is observed in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, The Philippines, and Vietnam (Tables 2-5, Figures 1-4).

For Brunei Darussalam in 2025, the production is increased due to a increase in planted area and yield. The increases in planted area are supported by a government policy and favorable weather. The increase in yield was also affected by favorable weather and farmers' practices pf applying more fertilizer and using better crop varieties.

For Cambodia in 2025, the production is increased due to an decrease in yield. The decrease in planted area is influenced by unfavorable weather conditions, rising prices of completing crops, declining rice prices, and government policies. Although, yield increases as farmers used more available fertilizer and adopted improved rice varieties.

For Indonesia in 2025, the production is increased due to an increase in planted area. The increase in planted area is influenced by favorable weather conditions, farmers responding to rise of rice prices, declining prices of competing crops, and government policies, which are mostly caused during the wet season. Additionally, the yield is decreased due to natural damage such as floods, diseases, pest infestations, and unfavorable weather conditions in some parts of Indonesia.

For Lao PDR in 2025, the production is increased due to an expansion in planted area. The increase in planted area is influenced by rising prices of rice and government policy. Even the increase in planted area, the yield is decreased due to farmers applying less fertilizer.

For Malaysia in 2025, the production is slightly increased due to an expansion in planted area and yield. The increase in planted area is caused by favorable weather. Moreover, the slight increase in yield is due to farmers practicing better crop management.

For Myanmar in 2025, the decrease in production is attributed to the decrease in planted area. The decrease in planted area is affected by the rising prices of competing crops and unfavorable weather. On the other hand, the yield is increased due to better crop management although some damage was caused by floods.

For the Philippines in 2025, the increase in production is attributed to the yield. Additionally, the decrease in production is observed during the wet and dry seasons.

For Thailand in 2025, the production is decreased due to a reduction in planted area because farmers responded to the rising prices of competing crops, declining prices of rice, and government policies. The yield slightly decreased due to unfavorable weather conditions, especially by drought, during the dry season.

For Vietnam in 2025, the increase in the production is attributed to an expansion in planted area and yield. The increase in planted area is affected by favorable weather conditions. Additionally, the yield is slightly increased by favorable weather conditions.

Utilization and Stock

The estimated domestic utilization of rice (milled rice) in ASEAN in 2025 increases by 1.44 million tons or 1.32 percent of 110.33 million tons from 108.89 million tons in 2024 (Tables 7-8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2025 is estimated at 117.69 percent, an decrease from 118.69 percent in 2024. The self-sufficiency ratio increased in Brunei Darussalam, Malaysia, the Philippines, and Vietnam while decreases are observed in Cambodia, Indonesia, Lao PDR, Myanmar, and Thailand. The highest ratio is found in Thailand, Myanmar, 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 ratio of the beginning stock to the domestic utilization (food security ratio) of ASEAN in 2025 is estimated at 36.85 percent as the optimum level, which increases by 9.53 percent from 2024. The ratios of Cambodia, Myanmar, and Thailand are higher than the optimum level. Myanmar has the highest ratio at 141.69 percent, which is followed by Thailand at 69.94 percent and Cambodia at 43.44 percent, while other countries are below the optimum level. The beginning stock in 2025 of ASEAN is estimated at 40.65 million tons, increasing 10.90 million tons, or 36.64 percent, from 29.75 million tons in 2024 (Table 11, Figure 13).

In summary, ASEAN's paddy production for the 2024/25 crop year shows a modest growth of 0.46 percent from 2024, driven by increased yields in some countries, with notable improvements in Brunei Darussalam, Cambodia, Myanmar, the Philippines, and Vietnam. However, unfavorable weather conditions, such as flood and drought, affect production in countries like Brunei Darussalam, Myanmar, Malaysia, and Thailand, leading to decreased planted areas in some regions. Despite these challenges, ASEAN's rice production remained sufficient to meet domestic demand, with an increase in the self-sufficiency ratio. The region also shows a rise in beginning stocks, ensuring food security for the coming year, although some countries still require rice imports to fulfill domestic needs.

Trade

In 2025, the entire ASEAN region exports 21.71 million tons of milled rice, marking a decrease of 1.22 million tons, or 5.33 percent, from 22.93 million tons in 2024. Additionally, the two major exporting countries, Vietnam and Thailand, will export approximately 10.16 and 9.95 million tons, respectively, in 2025 (Tables 7-8 and Figures 5-6).

The total rice imports of ASEAN in 2025 are estimated to be 12.98 million tons, a decrease of 0.49 million tons, or about 3.64 percent, from 13.47 million tons in 2024. In Vietnam, the import of milled rice is at 4.93 million tons in 2025, making it the largest importer in the ASEAN region (Tables 7-8, Figures 8-9).

Prices

The quantity and value of rice exports from ASEAN countries by countries of destination and the quantity and value of rice imports by countries of origin are given in Tables 12-13.

Monthly FOB prices for rice exports and CIF prices for rice imports in selected ASEAN countries during 2024 and 2025 (January-December) are presented in Tables 14-15 and Figures 14-16.

Damage Area

In 2025 (crop year 2024/25), the estimated damaged area of paddy of ASEAN amounts to 509,415 hectares. Of this, 130,167 hectares, or 25.55 percent, are attributed to flooding, while 378,672 hectares, or 74.33 percent, are attributed to unspecified factors. Myanmar bore the brunt of the flood damage, accounting for 130,157 hectares, or 25.55 percent. Additionally, factors such as drought, pests, diseases, and other factors contributed to the overall damage (Table 6).

Prospects for Rice in 2026

Production

ASEAN paddy production in 2026 (crop year 2025/26) is estimated at 202.07 million tons, increasing by 0.74 million tons, which is 0.37 percent from 201.33 million tons in 2025 (Tables 2-5, Figures 1-4).

Utilization and Stock

The domestic utilization of milled rice in ASEAN in 2026 is expected to be 109.69 million tons, a decrease of about 0.64 million tons, or 0.58 percent, compared to 110.33 million tons in 2025 (Tables 8-9).

The beginning stock for 2026 is estimated to be 51.44 million tons, an increase of 10.79 million tons, or 26.54 percent, from the 40.65 million tons recorded in 2025. Additionally, the ending stock is expected to rise by 14.20 million tons, or 27.61 percent, growing from 51.44 million tons in 2025 to 65.65 million tons in 2026 (Tables 8-9 and Figure 11).

The ratio of production to domestic utilization (self-sufficiency ratio) is estimated to be 119.05 percent in 2026, an increase from 117.69 percent in 2025. This indicates that rice production in some regions of ASEAN will still be sufficient, but some areas will need to import rice to meet domestic consumption (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (food security ratio) in ASEAN in 2026 is estimated to be 46.90 percent, an increase from 36.85 percent in 2025 (Table 11, Figure 13).

Trade

The milled rice imports of ASEAN are estimated to increase from 12.98 million tons in 2025 to 14.44 million tons in 2026, an increase of 1.46 million tons, or 11.21 percent (Tables 8-9, Figures 8 and 10).

For the export, the whole ASEAN is estimated to export 21.13 million tons in 2026, a decrease of 0.58 million tons, or about 2.67 percent, compared to 21.71 million tons in 2025 (Tables 8-9, Figures 5 and 7).

Table 2. Paddy production in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	200,453.40	201,328.60	875.20	0.44	202,067.96	739.35	0.37
Brunei	3.61	3.91	0.29	8.15	4.10	0.20	5.06
Cambodia	13,889.56	14,171.64*	282.07	2.03	14,000.00	-171.64	-1.21
Indonesia	53,142.73	54,154.75	1,012.02	1.90	54,210.01	55.26	0.10
Lao PDR	3,750.74	3,842.23	91.49	2.44	3,971.00	128.77	3.35
Malaysia	2,059.14	2,099.81	40.68	1.98	2,120.55	20.74	0.99
Myanmar	30,434.06	28,397.89	-2,036.16	-6.69	26,842.06*	-1,555.83	-5.48
Philippines	19,556.77	20,000.00	443.23	2.27	20,000.00*	0.00	0.00
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	33,851.58	33,551.34	-300.24	-0.89	35,813.18	2,261.85	6.74
Vietnam	43,765.22	45,107.04	1,341.83	3.07	45,107.04	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 3. Paddy planted area in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	46,319.33	45,410.16	-909.16	-1.96	46,647.33	1,237.16	2.72
Brunei	1.57	1.62	0.05	3.00	1.66	0.05	3.00
Cambodia	3,856.33	3,093.81	-762.51	-19.77	3,800.00*	706.19	22.83
Indonesia	10,327.65	10,259.91	-67.74	-0.66	10,328.30	68.39	0.67
Lao PDR	916.62	947.48	30.86	3.37	970.00	22.53	2.38
Malaysia	579.81	589.06	9.25	1.59	593.75	4.70	0.80
Myanmar	7,180.50	7,133.30	-47.20	-0.66	7,087.64*	-45.66	-0.64
Philippines	4,698.71	4,600.00	-98.71	-2.10	4,600.00	0.00	0.00
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	11,632.68	11,532.36	-100.32	-0.86	12,013.34	480.98	4.17
Vietnam	7,125.47	7,252.64	127.17	1.78	7,252.64	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 4. Paddy harvested area in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	45,676.11	45,300.41	-375.70	-0.82	45,472.87	172.46	0.38
Brunei	1.49	1.57	0.07	5.00	1.62	0.05	3.00
Cambodia	3,814.33	2,998.94*	-815.39	-21.38	3,800.00*	801.06	26.71
Indonesia	10,046.14	11,027.66	981.52	9.77	10,296.85	-730.81	-6.63
Lao PDR	913.00	947.48	34.48	3.78	970.00	22.53	2.38
Malaysia	574.38	588.78	14.40	2.51	593.47	4.69	0.80
Myanmar	7,163.66	6,634.79	-528.87	-7.38	6,214.83*	-419.96	-6.33
Philippines	4,698.71	4,600.00	-98.71	-2.10	4,600.00	0.00	0.00
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	11,338.93	11,248.56	-90.38	-0.80	11,743.46	494.90	4.40
Vietnam	7,125.47	7,252.64	127.17	1.78	7,252.64	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 5. Paddy yield in ASEAN countries in 2024 – 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	4.39	4.44	0.05	1.14	4.44	0.00	0.00
Brunei	2.42	2.49	0.07	2.89	2.54	0.05	2.01
Cambodia	3.64	4.73*	1.09	29.95	3.68*	-1.05	-22.20
Indonesia	5.29	4.91	-0.38	-7.18	5.26	0.35	7.13
Lao PDR	4.11	4.06	-0.05	-1.22	4.09	0.03	0.74
Malaysia	3.58	3.57	-0.01	-0.28	3.57	0.00	0.00
Myanmar	4.25	4.28	0.03	0.71	4.32*	0.04	0.93
Philippines	4.16	4.35	0.19	4.57	4.35*	0.00	0.00
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	2.99	2.98	-0.01	-0.33	3.05	0.07	2.35
Vietnam	6.14	6.22	0.08	1.30	6.22	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 6. Paddy damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectares

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	130,167	289	12	13	262	378,672	509,415
Brunei	10	12	12	13	-	-	47
Cambodia	-	-	-	-	-	94,871	94,871
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	277	-	-	-	-	277
Myanmar	130,157	-	-	-	262	-	130,419
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	283,801	283,801
Vietnam	-	-	-	-	-	-	-

Remark: - refers to data that is **Not Applicable**.

Table 7. Rice balance sheet of ASEAN countries in 2024 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	29,751,625	129,245,863	13,472,179	172,469,667	108,889,565	22,928,494	40,651,608	172,469,667
Brunei	8,551	2,348	29,127	40,025	31,097	-	8,928	40,025
Cambodia	2,603,849	8,889,320	-	11,493,169	7,421,155	645,872	3,426,142	11,493,169
Indonesia	4,134,399	34,021,974	4,519,400	42,675,773	34,273,021	475	8,402,277	42,675,773
Lao PDR	56,953	2,250,444	39,632	2,347,029	2,192,061	45,889	109,079	2,347,029
Malaysia	-	1,317,848	1,686,054	3,003,902	2,900,169*	103,733	-	3,003,902
Myanmar	11,356,172	19,209,975	-	30,566,147	12,360,717	1,841,100	16,364,330	30,566,147
Philippines	2,100,000	13,103,037	3,800,000	19,003,037	16,900,000	-	2,103,037	19,003,037
Singapore	-	-	448,295	448,295	260,192	188,103	-	448,295
Thailand	6,716,104	22,003,527	12,971	28,732,602	11,042,150	9,945,323	7,745,129	28,732,602
Vietnam	2,775,597	28,447,391	2,936,700	34,159,688	21,509,003	10,158,000	2,492,686	34,159,688

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 8. Rice balance sheet of ASEAN countries in 2025 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	40,651,608	129,844,169	12,981,188	183,476,965	110,329,130	21,706,046	51,441,789	183,476,965
Brunei	8,928	2,539	27,149	38,616	29,528	-	9,088	38,616
Cambodia	3,426,142	9,069,846*	-	12,495,989	7,886,894*	665,248*	3,943,846	12,495,989
Indonesia	8,402,277	34,669,869	1,962,860	45,035,006	35,716,144	1,334	9,317,528	45,035,006
Lao PDR	109,079	2,305,338	8,112	2,422,530	2,287,391	20,276	114,863	2,422,530
Malaysia	-	1,343,880	1,497,051*	2,840,931	2,730,338*	110,593*	-	2,840,931
Myanmar	16,364,330	17,924,749	-	34,289,079	11,549,779	1,892,007	20,847,293	34,289,079
Philippines	2,103,037	13,400,000	4,000,000*	19,503,037	17,000,000*	-	2,503,037	19,503,037
Singapore	-	-	549,664	549,664	285,777	263,887	-	549,664
Thailand	7,745,129	21,808,369	7,265	29,560,762	11,074,150	8,030,000	10,456,612	29,560,762
Vietnam	2,492,686	29,319,578	4,929,086	36,741,350	21,769,129	10,722,701	4,249,520	36,741,350

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 9. Rice balance sheet of ASEAN countries in 2026 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	51,441,789	130,584,737	14,436,647	196,463,173	109,692,471	21,125,505	65,645,198	196,463,173
Brunei	9,088	2,668	25,959	37,715	29,494	-	8,221	37,715
Cambodia	3,943,846	8,960,000*	-	12,903,846	8,096,800	685,206	4,121,841	12,903,846
Indonesia	9,317,528	34,705,248	3,181,702	47,204,478	34,693,697	1,132	12,509,649	47,204,478
Lao PDR	114,863	2,382,600	36,258	2,533,721	2,325,052	54,663	154,006	2,533,721
Malaysia	-	1,357,154	1,554,662*	2,911,816	2,794,289*	117,527*	-	2,911,816
Myanmar	20,847,293	17,178,920*	-	38,026,213	11,440,000*	1,900,000*	24,686,213	38,026,213
Philippines	2,503,037	13,400,000	4,200,000*	20,103,037	17,000,000*	-	3,103,037	20,103,037
Singapore	-	-	498,980	498,980	272,985	225,995	-	498,980
Thailand	10,456,612	23,278,570	10,000*	33,745,182	11,082,150	7,530,000	15,133,032	33,745,182
Vietnam	4,249,520	29,319,578	4,929,086	38,498,184	21,958,005	10,610,982	5,929,198	38,498,184

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 10. Ratio of rice's production to domestic utilization in ASEAN countries (self-sufficiency ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	129,245,862.93	108,889,565.36	118.69	129,844,168.78	110,329,129.85	117.69	130,584,737.00	109,692,470.58	119.05
Brunei	2,347.83	31,097.33	7.55	2,539.18	29,527.94	8.60	2,667.66	29,493.55	9.04
Cambodia	8,889,319.68	7,421,154.53	119.78	9,069,846.40	7,886,894.08	115.00	8,960,000.00	8,096,799.91	110.66
Indonesia	34,021,973.79	34,273,020.85	99.27	34,669,868.67	35,716,143.68	97.07	34,705,247.76	34,693,696.62	100.03
Lao PDR	2,250,444.00	2,192,060.91	102.66	2,305,338.00	2,287,391.04	100.78	2,382,600.00	2,325,052.30	102.48
Malaysia	1,317,847.68	2,900,169.13	45.44	1,343,880.32	2,730,338.32	49.22	1,357,153.92	2,794,288.62	48.57
Myanmar	19,209,975.00	12,360,717.41	155.41	17,924,749.36	11,549,778.76	155.20	17,178,920.03	11,440,000.00	150.17
Philippines	13,103,037.44	16,900,000.00	77.53	13,400,000.00	17,000,000.00	78.82	13,400,000.00	17,000,000.00	78.82
Singapore	-	260,192.47	-	-	285,777.30	-	-	272,984.89	-
Thailand	22,003,526.66	11,042,150.00	199.27	21,808,368.82	11,074,150.00	196.93	23,278,569.60	11,082,150.00	210.05
Vietnam	28,447,390.84	21,509,002.72	132.26	29,319,578.02	21,769,128.72	134.68	29,319,578.02	21,958,004.69	133.53

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 11. Ratio of rice's beginning stock to domestic utilization in ASEAN countries (food security ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	29,751,625.36	108,889,565.36	27.32	40,651,607.96	110,329,129.85	36.85	51,441,789.09	109,692,470.58	46.90
Brunei	8,550.90	31,097.33	27.50	8,928.05	29,527.94	30.24	9,088.25	29,493.55	30.81
Cambodia	2,603,849.00	7,421,154.53	35.09	3,426,142.15	7,886,894.08	43.44	3,943,846.31	8,096,799.91	48.71
Indonesia	4,134,399.00	34,273,020.85	12.06	8,402,277.00	35,716,143.68	23.53	9,317,528.00	34,693,696.62	26.86
Lao PDR	56,953.00	2,192,060.91	2.60	109,079.49	2,287,391.04	4.77	114,863.25	2,325,052.30	4.94
Malaysia	-	2,900,169.13	-	-	2,730,338.32	-	-	2,794,288.62	-
Myanmar	11,356,172.00	12,360,717.41	91.87	16,364,329.59	11,549,778.76	141.69	20,847,293.19	11,440,000.00	182.23
Philippines	2,100,000.00	16,900,000.00	12.43	2,103,037.44	17,000,000.00	12.37	2,503,037.44	17,000,000.00	14.72
Singapore	-	260,192.47	-	-	285,777.30	-	-	272,984.89	-
Thailand	6,716,104.00	11,042,150.00	60.82	7,745,128.66	11,074,150.00	69.94	10,456,612.48	11,082,150.00	94.36
Vietnam	2,775,597.46	21,509,002.72	12.90	2,492,685.58	21,769,128.72	11.45	4,249,520.17	21,958,004.69	19.35

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 12. Quantity and value of rice exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	ASEAN*	2,085,889	794,580,000	2,085,889	794,580,000	334,179	246,310,000	2,420,068	1,040,890,000
Indonesia	-	-	-	-	-	6.11	16,340	6.11	16,340
Lao PDR	Vietnam	17,181	7,883,673	17,181	7,883,673	3,095	2,221,534	20,276	10,105,207
Malaysia	Indonesia	20,534	12,670,214	20,617	12,701,633	5,474.23	2,629,750	26,092	15,331,383
	Singapore	83.30	31,419						
Myanmar	Cambodia	100	62,000	11,592	4,687,000	1,880,416	139,884,000	1,892,007	144,571,000
	Philippines	11,180	4,483,000						
	Singapore	104	66,000						
	Vietnam	208	76,000						
Philippines	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	8,631	8,860,055	321,531	181,155,213	2,747,071	1,690,797,959	3,068,602	1,871,953,172
	Cambodia	611	322,845						
	Indonesia	42,546	26,717,810						
	Lao PDR	21,744	8,308,227						
	Malaysia	56,636	27,891,019						
	Myanmar	4,010	1,969,190						
	Philippines	132,221	57,465,230						
	Singapore	51,378	47,039,386						
	Vietnam	3,754	2,581,451						
Vietnam	Cambodia	15,820	10,137,272	1,710,458	854,072,132	1,717,445	911,181,042	3,427,903	1,765,253,174
	Indonesia	16,347	7,343,339						
	Malaysia	135,151	73,058,029						
	Philippines	1,488,492	731,414,025						
	Singapore	54,648	32,119,467						

Remark: - is noted that the value is **Not Applicable**. * noted that the information is **Not Available**.

Table 13. Quantity and value of rice imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	0.0030	17	73,924	41,516,820	45,161.37	23,592,895	119,086	65,109,714
	Myanmar	18,640	8,816,385						
	Singapore	0.273	371.00						
	Thailand	30,234	19,888,023						
	Vietnam	25,050	12,812,024						
Lao PDR	Thailand	3,648	1,610,293	3,705	1,636,609	4,407	2,480,100	8,112	4,116,709
	Vietnam	57	26,316						
Malaysia	Cambodia	30,654	22,958,017	122,743	79,760,332	234,879.02	128,201,706	357,622	207,962,038
	Thailand	29,110	18,198,953						
	Vietnam	62,979	38,603,362						
Myanmar	-	-	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-	-	-
Singapore	Cambodia	9,211	6,964,893	965	899,591	660	1,397,928	1,625	2,297,519
	Indonesia	81	38,636						
	Malaysia	2,004	921,627						
	Myanmar	2,696	9,266,765						
	Thailand	122,185	115,080,949						
	Vietnam	148,846	88,000,225						
Thailand	Cambodia	0.0060	64.00	3,970	2,318,280	4,695	5,487,627	8,665	7,805,907
	Indonesia	0.0030	33						
	Lao PDR	3,234	1,890,640						
	Myanmar	0.0060	28.00						
	Vietnam	736	427,515						
Vietnam	Cambodia	-	760,196,480	-	779,047,794	-	76,989,745	-	856,037,540
	Indonesia	-	9,113,613						
	Myanmar	-	1,103,560						
	Philippines	-	6,509,708						
	Singapore	-	5,530						
	Thailand	-	2,118,903						

Remark: - is noted that the value is **Not Applicable**.

Table 14. FOB prices of rice in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia	- MLYS ANGKOR Standard 5% broken	2024	950	940	950	940	930	950	945	945	909	935	890	909	933
		2025	900	910	910	920	940	930	940	-	-	-	-	-	921
	- Organic Parboiled Rice Standard 5% broken	2024	1,220	1,210	1,220	1,230	1,250	1,200	1,200	1,250	1,100	1,150	1,150	1,100	1,190
		2025	1,030	1,050	1,075	1,050	1,100	1,150	1,150	-	-	-	-	-	1,086
Indonesia	HS-code 10063099	2024	-	2,600	-	-	2,408	3,613	909	-	3,115	2,101	-	-	2,458
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
Lao PDR	Mix Milled rice quality 1	2024	477	412	474	382	535	576	572	508	511	312	345	389	458
		2025	385	440	443	498	-	-	-	-	-	-	-	-	442
Malaysia	- HS-code 1006209000	2024	0	0	1,070	955	1,083	0	535	1,078	0	970	1,023	0	959
		2025	963	0	0	-	-	-	-	-	-	-	-	-	963
	- HS-code 1006303000	2024	621	598	541	612	667	631	619	620	655	606	598	0	615
		2025	0	0	626	-	-	-	-	-	-	-	-	-	626
	- HS-code 1006305000	2024	0	0	0	0	0	0	4,342	2,282	799	4,551	0	0	2,994
		2025	0	0	0	-	-	-	-	-	-	-	-	-	-
Myanmar	- HS-code 1006307000	2024	0	0	0	0	0	0	3,557	1,437	1,509	1,411	0	0	1,978
		2025	0	0	0	-	-	-	-	-	-	-	-	-	-
	- HS-code 1006309900	2024	485	492	547	578	581	627	597	620	612	548	0	481	561
		2025	526	611	629	-	-	-	-	-	-	-	-	-	589
	- HS-code 1006409000	2024	0	0	0	0	0	0	0	353	0	0	0	0	353
		2025	0	0	0	-	-	-	-	-	-	-	-	-	-
Myanmar	Not specified	2024	573	582	588	595	575	567	576	535	514	505	508	510	552
		2025	473	469	437	409	-	-	-	-	-	-	-	-	447
Thailand	- Thailand Hommali Rice 100%	2024	880	872	854	852	899	905	914	976	1,091	1,114	897	926	932
		2025	943	947	984	1,000	1,074	-	-	-	-	-	-	-	990
	- White Rice 5%	2024	660	624	613	594	637	632	590	589	566	516	511	527	588
Vietnam		2025	478	437	422	416	431	-	-	-	-	-	-	-	437
		2024	695	661	631	619	610	626	601	598	624	641	630	630	631
	Not specified	2025	594	514	492	501	521	-	-	-	-	-	-	-	524

Remark: - is noted that the value is **Not Applicable**.

Table 15. CIF prices of rice in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS-code 10063099	2024	636	653	656	647	628	617	599	578	570	565	556	526	603
		2025	530	-	-	-	-	-	-	-	-	-	-	-	530
Lao PDR	Mix Milled rice quality 1	2024	492	246	382	393	340	371	528	417	610	596	533	589	458
		2025	381	420	412	422	-	-	-	-	-	-	-	-	409
Malaysia	-HS-code 1006101000	2024	0	0	0	0	0	0	0	4,748	0	3,456	0	0	4,102
		2025	1,552	0	0	-	-	-	-	-	-	-	-	-	1,552
	-HS-code 1006209000	2024	534	497	0	0	0	0	0	0	0	0	0	494	508
		2025	0	0	0	-	-	-	-	-	-	-	-	-	-
	-HS-code 1006303000	2024	635	648	636	622	638	631	642	647	666	596	902	655	660
		2025	761	636	613	-	-	-	-	-	-	-	-	-	670
	-HS-code 1006304000	2024	771	878	861	888	889	921	1,124	1,056	961	894	0	1,014	933
		2025	1,285	1,012	1,296	-	-	-	-	-	-	-	-	-	1,198
	-HS-code 1006305000	2024	1,030	929	1,070	991	993	1,001	1,006	967	1,077	942	973	914	991
		2025	939	858	843	-	-	-	-	-	-	-	-	-	880
	-HS-code 1006307000	2024	763	800	814	763	757	754	789	776	757	735	853	798	780
		2025	854	785	708	-	-	-	-	-	-	-	-	-	782
	-HS-code 1006309100 and 1006309100	2024	585	621	632	617	612	602	613	635	657	573	583	618	612
		2025	536	541	504	-	-	-	-	-	-	-	-	-	527
	-HS-code 1006409000	2024	478	0	0	0	0	504	511	0	485	452	438	474	477
		2025	477	379	387	-	-	-	-	-	-	-	-	-	414
Singapore	Not specified	2024	811	799	729	791	821	782	788	819	783	759	688	735	775
		2025	701	633	699	609	669	595	614	600	651	831	701	711	668

Remark: - is noted that the value is **Not Applicable**.

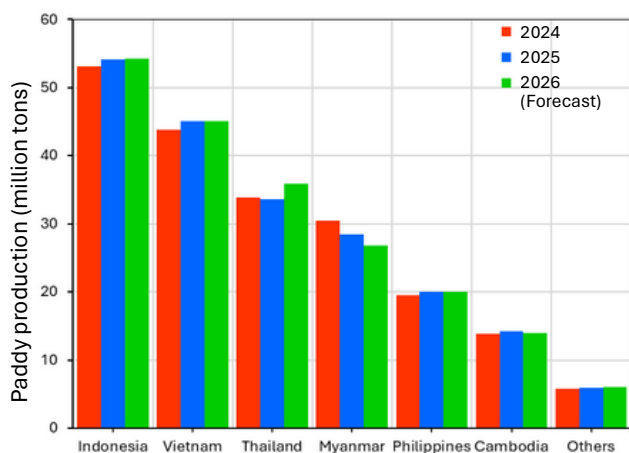


Figure 1. Paddy production of selected countries in ASEAN in 2024-2026

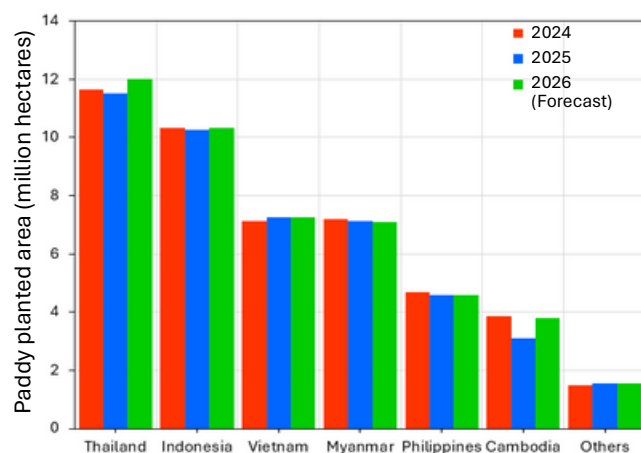


Figure 2. Paddy planted area of selected countries in ASEAN in 2024-2026

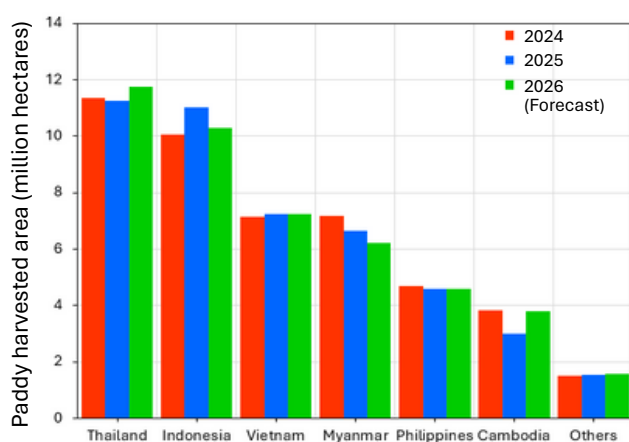


Figure 3. Paddy harvested area of selected countries in ASEAN in 2024-2026

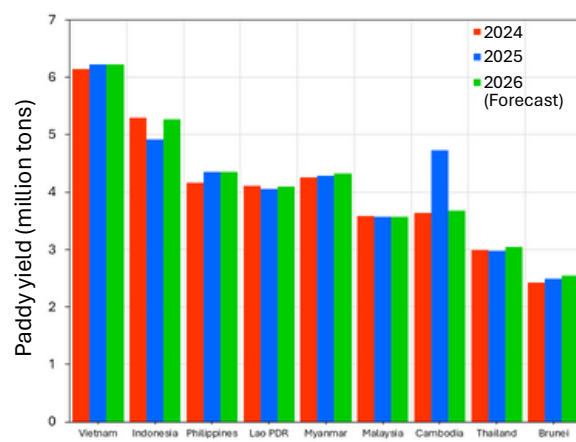


Figure 4. Paddy yield of selected countries in ASEAN in 2024-2026

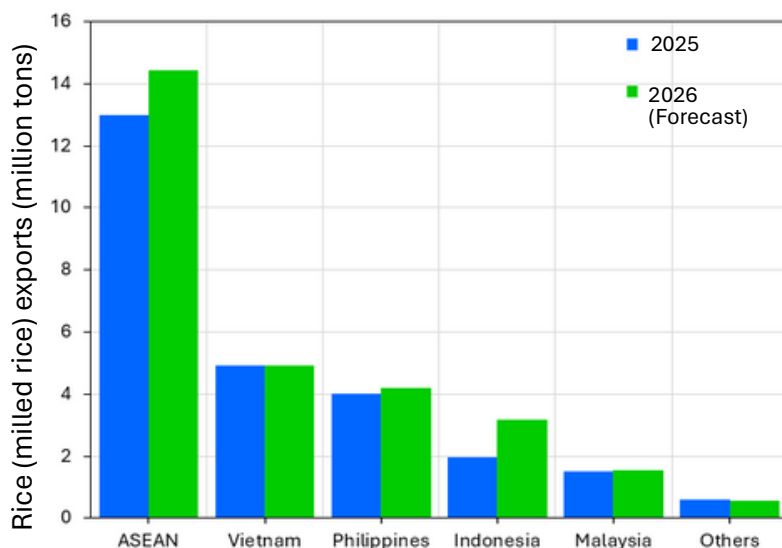


Figure 5. Amount of rice exports of selected countries in ASEAN in 2025-2026



Total 12.98 million tons

Figure 6. Share of rice exports (tons) among ASEAN countries in 2025



Total 14.44 million tons

Figure 7. Share of rice exports (tons) among ASEAN countries in 2026

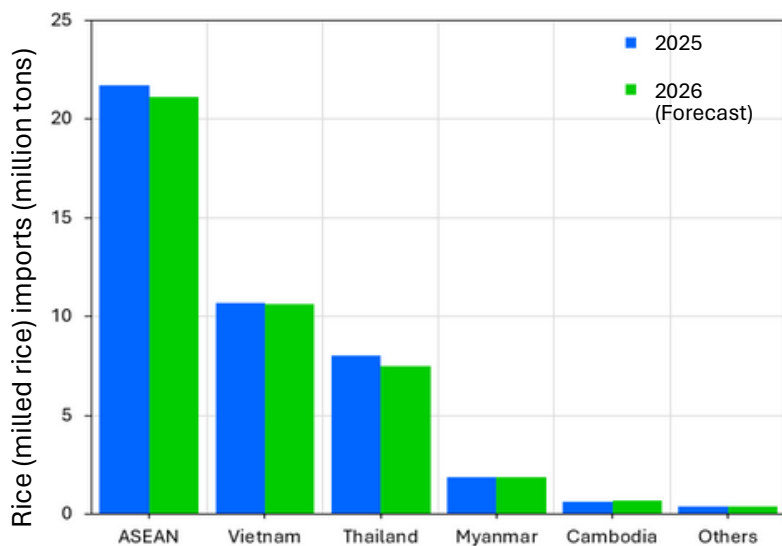
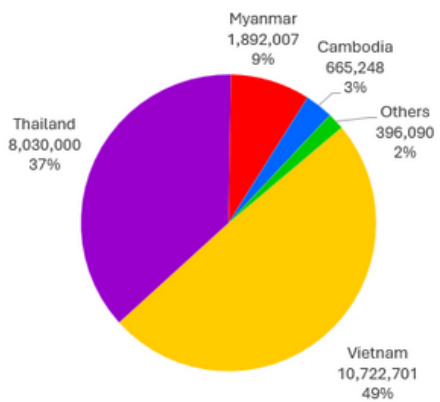
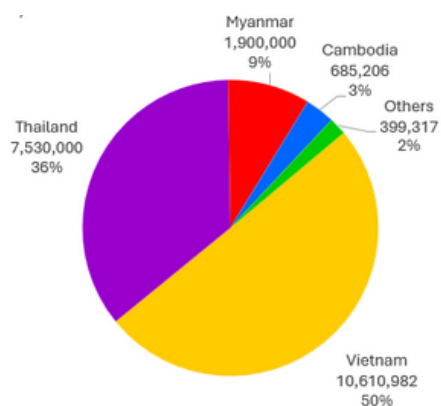


Figure 8. Amount of rice imports of selected countries in ASEAN in 2025-2026



Total 21.71 million tons

Figure 9. Share of rice imports (tons) among ASEAN countries in 2025



Total 21.13 million tons

Figure 10. Share of rice imports (tons) among ASEAN countries in 2026

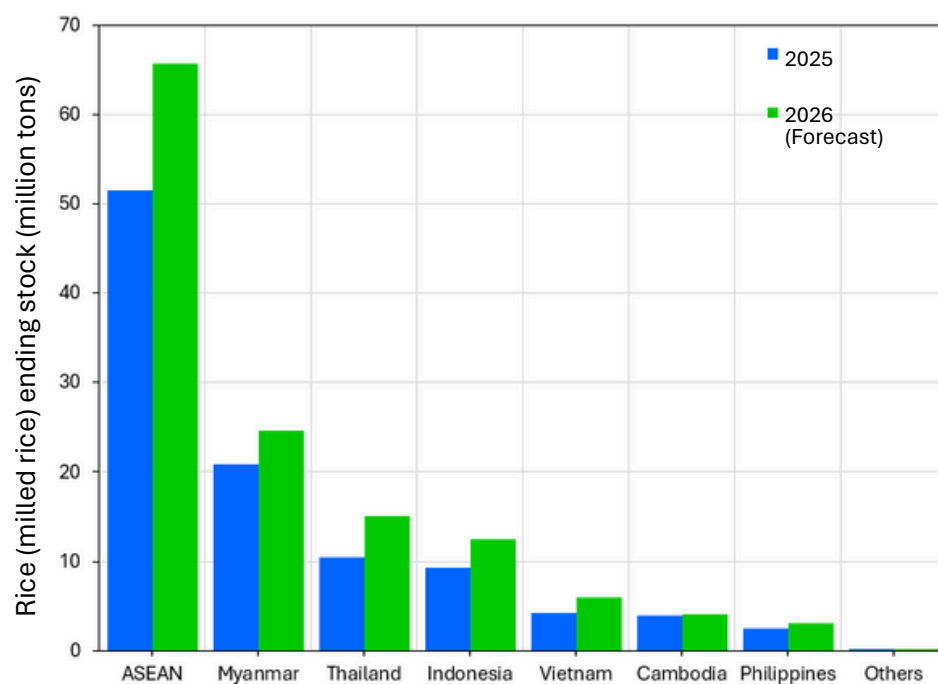


Figure 11. Amount of ending stock of rice in ASEAN in 2025-2026

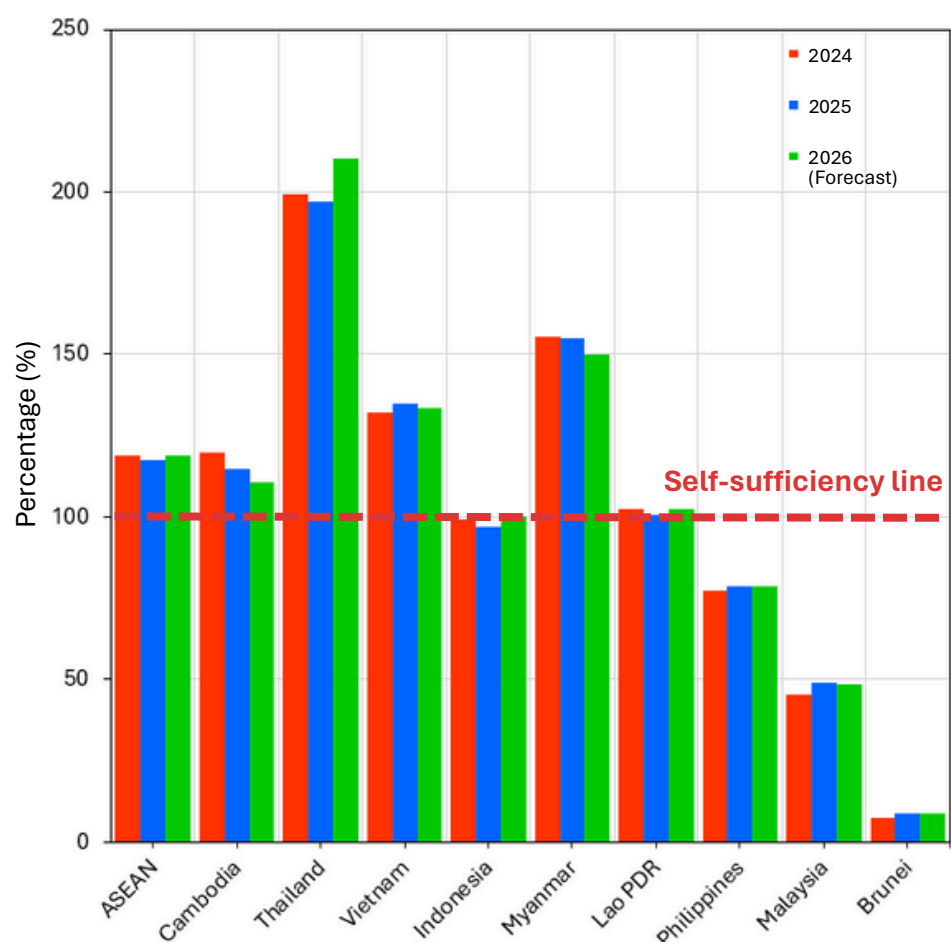


Figure 12. Ratio of rice production to domestic utilization in ASEAN in 2024-2026

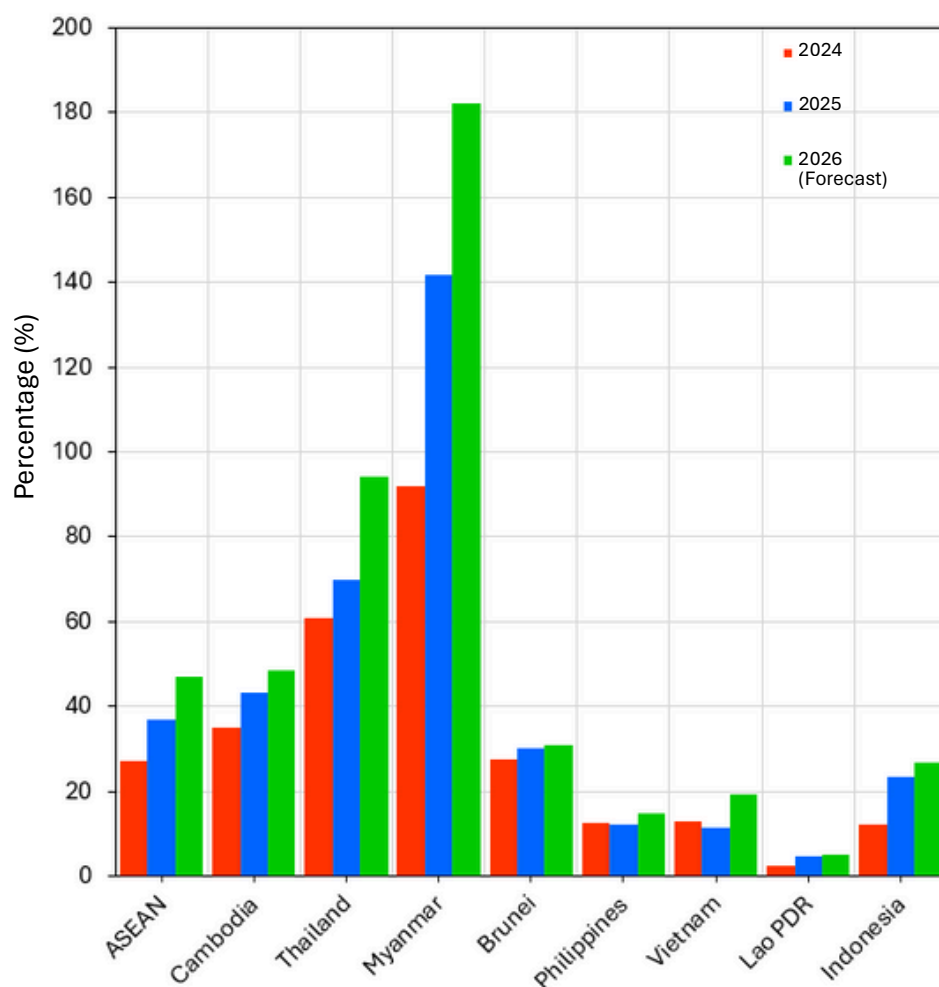


Figure 13. Ratio of rice beginning stock to domestic utilization in ASEAN in 2024-2026

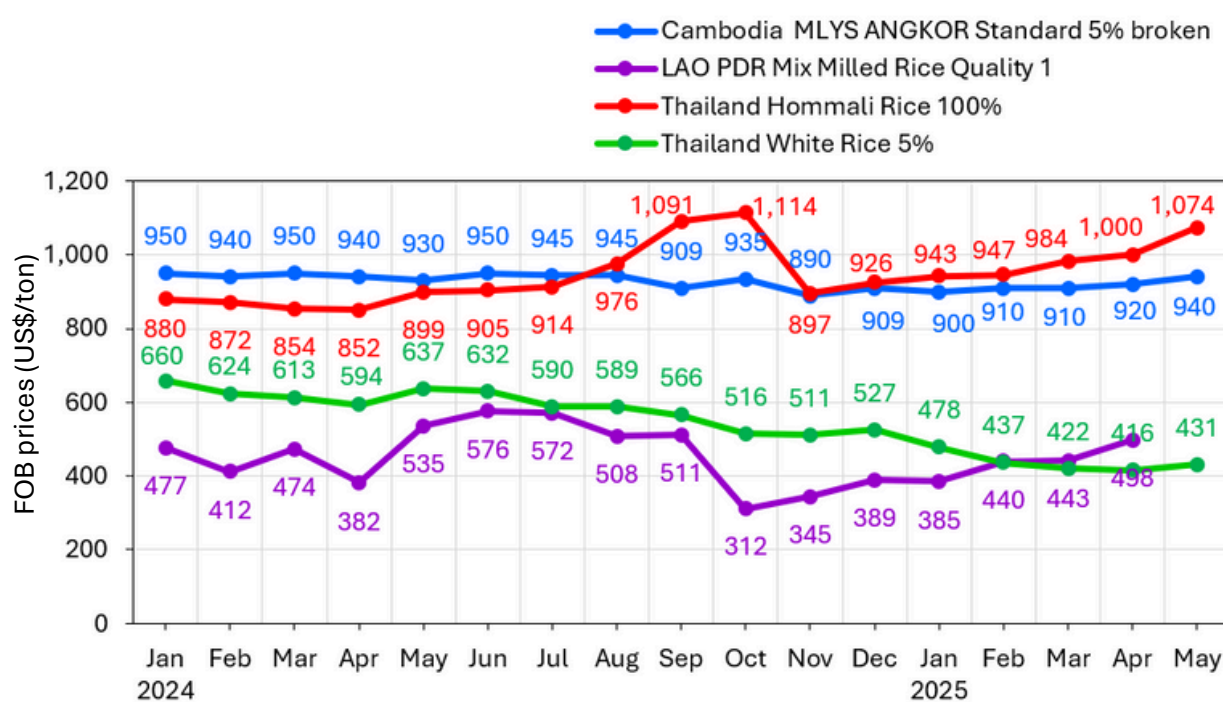


Figure 14. FOB prices (US\$/ton) of milled rice of selected countries in ASEAN in 2024-2025

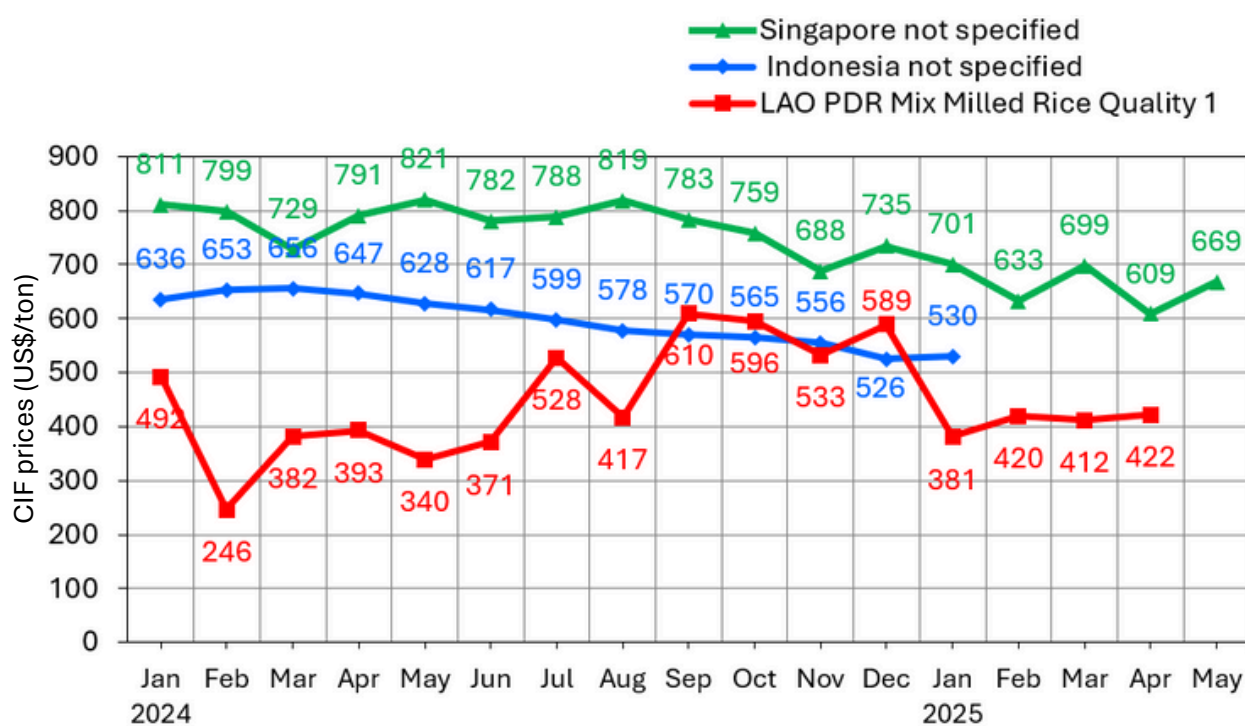


Figure 15. CIF prices (US\$/ton) of milled rice of selected countries in ASEAN in 2024-2025

Maize Outlook for 2026

Highlights

The increase in ASEAN maize supply in 2026 is due to the increase in the beginning stock, production, and imports. The supply is forecast to increase by 4.68 million tons, or 6.97 percent, from 67.16 million tons in 2025 to approximately 71.84 million tons in 2026 (Table 16). The forecast indicates that the maize beginning stock is expected to significantly increase by approximately 2.49 million tons, or 28.17 percent, from 8.84 million tons in 2025 to 11.33 million tons in 2026. The production of maize is forecast to increase by 1.21 million tons, or 3.21 percent, from 37.66 million tons in 2025 to 38.87 million tons in 2026. The import of maize is forecast to slightly increase by 0.97 million tons, or 4.70 percent, from 20.66 million tons in 2025 to 21.63 million tons in 2026.

The demand for maize in 2026 is expected to increase in the domestic utilization, ending stock, and export. Accordingly, the domestic utilization is predicted to rise by 1.07 million tons, or 2.01 percent, from 53.25 million tons in 2025 to 54.32 million tons in 2026. The ending stock of maize is expected to increase by 3.29 million tons, or 29.04 percent, from 11.33 million tons in 2025 to 14.62 million tons in 2026. Moreover, the maize exports are slightly increased by 0.33 million tons, or 12.84 percent, from 2.57 million tons in 2025 to 2.90 million tons in 2026.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to increase by 0.83 percent from 70.72 percent in 2025 to 71.55 percent in 2026. The beginning stock to domestic utilization ratio, referred to as the food security ratio, is expected to increase by 4.26 percent from 16.60 percent in 2025 to 20.86 percent in 2026.

Table 16. Summary of the ASEAN maize situation in 2025-2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	67.16	71.84	4.68	6.97
• Beginning stock	8.84	11.33	2.49	28.17
• Production	37.66	38.87	1.21	3.21
• Import	20.66	21.63	0.97	4.70
Demand (Million tons)	67.16	71.84	4.68	6.97
• Domestic utilization	53.25	54.32	1.07	2.01
• Export	2.57	2.90	0.33	12.84
• Ending stock	11.33	14.62	3.29	29.04
Ratio of production to domestic utilization (%)	70.72	71.55	0.83	-
Ratio of beginning stock to domestic utilization (%)	16.60	20.86	4.26	-

ASEAN Maize Situation in 2025



Production

ASEAN maize production in 2025 (crop year 2024/25) is estimated at 43.75 million tons, an increase of 0.15 million tons, or 0.35 percent, from 43.59 million tons in 2024 (crop year 2023/24). The decrease in maize production in 2025 is observed in Cambodia, Malaysia, Myanmar, and the Philippines due to the decrease in planted areas. Meanwhile, the production is increased in Brunei Darussalam, Indonesia, Lao PDR, Thailand, and Vietnam due to yield increase, despite showing a decline in planted area (Tables 17-20, Figures 16-19).

For Brunei Darussalam in 2025, the increase of production is attributed to a rise in the planted area due to favorable weather conditions and farmers' practices of improving crop management and using more maize varieties.

For Indonesia in 2025, the increase in production is attributed to an increase in yield. The increase in yield is driven by favorable weather conditions, farmers' practices of improving crop management, and applying more fertilizer and maize varieties. On the other hand, the decrease in planted area is due to declining maize prices, the rising of competing food crops and horticulture commodities, and government policies on the rice self-sufficiency acceleration.

For Lao PDR in 2025, the increase in the production is attributed to planted areas due to farmers responding to an increase in prices and government policies. Meanwhile, the decline in yield resulted from farmers using less fertilizer in the wet season.

For Malaysia in 2025, the decrease in production is attributed to the decrease in both planted areas and yield.

For Myanmar in 2025, the decrease in production is attributed to the decrease in both planted area and yield. The decrease in planted area is affected by rising prices of competing crops. Additionally, the decrease in yield is due to farmers applying less fertilizer and the occurrence of natural damages to crops.

For Thailand in 2025, the increase in production is attributed to the increase in planted area and yield. Moreover, the suitable weather conditions in the wet season contribute to an increase in yield.

For Vietnam in 2025, the increase in production is attributed to the increase in yield driven by favorable weather conditions and farmers' practice of improving crop management, while the decrease in planted area is due to declining maize prices and government policies.



Utilization and Stock

The maize utilization in ASEAN in 2025 is estimated at 53.25 million tons, reflecting an increase of 0.56 million tons, or 1.06 percent, compared to 52.69 million tons in 2024 (Tables 22-23). The rise in domestic maize utilization is observed in Cambodia, Indonesia, Lao PDR, Malaysia, and the Philippines, despite decreases in Myanmar, Singapore, Thailand, and Vietnam.

The beginning stock of maize in ASEAN in 2025 is estimated at 8.89 million tons, an increase of 4.18 million tons, or 88.52 percent, from 4.72 million tons in 2024 (Tables 22-23).

The ratio of maize production to domestic utilization for the entire ASEAN region in 2025 is estimated at 70.48 percent, showing an increase from 69.50 percent in 2024 (Table 25, Figure 27).

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 have ratios above 100 percent, indicating that they produced more maize than needed for their domestic consumption. On the other hand, Brunei Darussalam, Malaysia, the Philippines, Thailand, and Vietnam have 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 increases to 16.64 percent in 2025 from 8.96 percent in 2024 (Table 26, Figure 28).

In global comparison, maize production is reaching record highs in 2025, supported by favorable yields in Brazil and India¹. Similarly, ASEAN's maize production is slightly increasing, which is estimated at 43.75 million tons, up 0.35 percent from the previous year, mainly due to rising planted areas in countries like the Philippines and Thailand. However, major country like Vietnam showed increased yields despite declining planted areas.

ASEAN maize utilization is projected to grow to 53.43 million tons, passing over production and creating a significant production-utilization gap. In 2025, ASEAN meets only 70.48 percent of its maize needs from domestic output, while globally, ample production and a rising stock-to-use ratio of 30.3 percent suggest adequate global supply and stronger self-sufficiency¹.

Globally, the trade in maize is decreasing by 1.9 percent due to supply chain changes, with higher exports from nations like Uganda offsetting lower exports from Ukraine¹. In contrast, ASEAN remains a significant net importer, bringing in 20.66 million tons while exporting just 2.57 million tons, primarily from Myanmar. This dependency underscores ASEAN's vulnerability to global price and supply fluctuations.



Trade

In 2025, ASEAN exports 2.58 million tons of maize while importing 20.66 million tons (Table 23, Figures 20-21 and 23-24). Myanmar, the largest exporter in ASEAN, is contributed 70.30 percent of the total maize exports, amounting to 1.81 million tons (Table 23, Figures 20-21).

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



Prices

The monthly FOB prices for maize exporting countries and CIF prices for importing countries for 2024 and 2025 are shown in Tables 29-30 and Figures 29-30. Singapore is the biggest importer of maize in ASEAN. The annual average FOB price for Indonesia in 2025 is 773 US\$ per ton according to HS-code 10059091 and 100590999 (data updated as of January to April). The annual average CIF price for Singapore in 2025 is estimated to import maize production around 668 US\$ per ton.

Reference:

1. Global cereal production projected at all-time high, but uncertainties persist [Internet]. The Food and Agriculture Organization of the United Nations (FAO). 2025 [cited 2025 July 25]. Available from: <https://www.fao.org/worldfoodsituation/csdb>.

Damaged Area

The damaged area of maize in 2025 is estimated to be 19,926 hectares. Of this, 6,181 hectares are caused by floods in Myanmar. Unspecified types of damages are observed in Cambodia, Malaysia, and Thailand of 13,708 hectares. (Table 21).

Prospects for Maize in 2026

Production

Maize production in ASEAN in 2026 (crop year 2025/26) is estimated at 44.99 million tons, up from 43.75 million tons in 2025. The increase is observed in all ASEAN countries except Cambodia and Malaysia. The largest increase in terms of quantity is recorded in Indonesia, with production rising to approximately 23.19 million tons in 2026 from 22.09 million tons in 2025 (Table 17).

For Brunei Darussalam in 2026, the increase of production is attributed to the rise in planted area. The increase in planted area is a result of favorable weather, increased fertilizer application, and improved care practices.

For Indonesia in 2026, the increase in production is attributed to the expansion in planted area due to rising maize prices, favorable weather conditions, and government policies. Meanwhile, the yield is forecast to decrease due to pest and disease infestations, and unfavorable weather conditions in some parts.

For Lao PDR in 2026, the increase in production is attributed to the expansion in both planted area and yield due to rising maize prices, government policies, and farmers applying more crop varieties and improving crop management.

Utilization and Stock

The domestic utilization of maize in ASEAN is estimated to be 54.32 million tons in 2026, up from 53.43 million tons in 2025 (Tables 23-24). The estimated beginning stock for 2026 is 11.20 million tons, which is an increase of 2.31 million tons from 8.89 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase to 71.55 percent in 2026, up from 70.48 percent in 2025 (Table 25, Figure 27). Meanwhile, the ratio of beginning stock to domestic utilization (food security ratio) is expected to be 20.62 percent in 2026, an increase from 16.64 percent in 2025 (Table 26, Figure 28).

Trade

The maize export from ASEAN is expected to increase to 2.90 million tons in 2026, up from 2.57 million tons in 2025. The forecast for maize imports by ASEAN in 2026 is 21.63 million tons, an increase from 20.66 million tons in 2025 (Tables 23-24, Figures 20, 22, 23, and 25).

Table 17. Maize production in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	43,594.54	43,748.13	153.59	0.35	44,993.55	1,245.42	2.85
Brunei	0.47	0.61	0.13	28.33	0.64	0.03	5.00
Cambodia	1,221.42	1,070.89	-150.53	-12.32	1,048.86*	-22.03	-2.06
Indonesia	20,478.69	22,088.71	1,610.02	7.86	23,192.22	1,103.51	5.00
Lao PDR	515.30	547.30	32.00	6.21	725.30	178.00	32.52
Malaysia	1,656.65	316.11	-1,340.54	-80.92	60.32*	-255.79	-80.92
Myanmar	2,596.62	2,465.02	-131.60	-5.07	2,499.19*	34.17	1.39
Philippines	8,162.27	8,000.00*	-162.27	-1.99	8,000.00*	-	-
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	4,560.97	4,739.47	178.50	3.91	4,925.61	186.14	3.93
Vietnam	4,402.15	4,520.02	117.87	2.68	4,541.40	21.38	0.47

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 18. Maize planted area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	8,353.28	8,086.57	-266.71	-3.19	8,499.38	412.81	5.10
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	197.36	191.58	-5.78	-2.93	189.66*	-1.92	-1.00
Indonesia	2,563.69	2,484.55	-79.14	-3.09	2,969.02	484.47	19.50
Lao PDR	103.60	110.60	7.00	6.75	146.37	35.77	32.34
Malaysia	545.53	307.40	-238.13	-43.65	173.22	-134.18	-43.65
Myanmar	649.63	627.87	-21.76	-3.35	631.01	3.14	0.50
Philippines	2,430.96*	2,490.00*	59.04	2.43	2,490.00*	-	-
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	991.04	1,005.34	14.29	1.44	1,030.10	24.76	2.46
Vietnam	871.46	869.23	-2.23	-0.26	870.00	0.77	0.09

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 19. Maize harvested area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	8,192.95	7,917.82	-275.13	-3.36	8,368.20	450.38	5.69
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	196.14	186.05	-10.10	-5.15	184.19	-1.86	-1.00
Indonesia	2,548.65	2,484.55	-64.10	-2.52	2,969.02	484.47	19.50
Lao PDR	103.60	110.60	7.00	6.75	146.37	35.77	32.34
Malaysia	423.33	158.39	-264.94	-62.58	59.26	-99.13	-62.58
Myanmar	648.91	621.69	-27.22	-4.20	624.80	3.11	0.50
Philippines	2,430.96	2,490.00	59.04	2.43	2,490.00	-	-
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	979.29	997.31	18.02	1.84	1,024.56	27.25	2.73
Vietnam	862.06	869.23	7.17	0.83	870.00	0.77	0.09

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 20. Maize yield in ASEAN countries in 2024 – 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	5.32	5.53	0.21	3.95	5.38	-0.15	-2.71
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	6.23	5.76	-0.47	-7.54	5.69	-0.07	-1.22
Indonesia	8.04	8.89	0.85	10.57	7.81	-1.08	-12.15
Lao PDR	4.97	4.95	-0.02	-0.40	4.96	0.01	0.20
Malaysia	3.91	2.00	-1.91	-48.85	1.02	-0.98	-49.00
Myanmar	4.00	3.97	-0.03	-0.75	4.00	0.03	0.76
Philippines	3.36	3.21	-0.15	-4.46	3.21	-	-
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	4.66	4.75	0.09	1.93	4.81	0.06	1.26
Vietnam	5.11	5.20	0.09	1.76	5.22	0.02	0.38

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 21. Maize damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectares

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	6,181	-	-	-	36	13,708	19,926
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	5,532	5,532
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	149	149
Myanmar	6,181	-	-	-	36	-	6,217
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	8,027	8,027
Vietnam	-	-	-	-	-	-	-

Remark: - refers to data that is **Not Applicable**.

Table 22. Maize balance sheet of ASEAN countries in 2024

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	4,717,601	36,584,473	22,384,122	63,686,197	52,640,133	2,152,482	8,893,582	63,686,197
Brunei	-	578	347	925	925	-	-	925
Cambodia	1,039,456	1,221,418	-	2,260,874	587,827	78,561	1,594,486	2,260,874
Indonesia	956,330	15,123,513	2,289,218	18,369,061	14,734,308	55,651	3,579,102	18,369,061
Lao PDR	96,077	515,300	16,096	627,474	345,388	252,083	30,002	627,474
Malaysia	-	1,657	1,673,805	1,675,462	1,672,485*	2,977	-	1,675,462
Myanmar	1,466,711	2,596,618	2,286	4,065,615	843,095	1,344,913	1,877,607	4,065,615
Philippines	432,000*	8,162,270	1,784,000*	10,378,270	9,600,000*	-	778,270	10,378,270
Singapore	-	-	1,715	1,715	1,614	101	-	1,715
Thailand	174,467	4,560,970	4,100,000	8,835,437	8,717,431*	1,229	116,777	8,835,437
Vietnam	552,560	4,402,150	12,516,654	17,471,364	16,137,058	416,968	917,337	17,471,364

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 23. Maize balance sheet of ASEAN countries in 2025

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	8,893,582	37,656,134	20,660,084	67,209,800	53,431,664	2,574,528	11,203,608	67,209,800
Brunei	-	607	365	971	971	-	-	971
Cambodia	1,594,486	1,070,892	-	2,665,378	692,998	71,548	1,900,831	2,665,378
Indonesia	3,579,102	16,312,514	1,195,055	21,086,671	15,470,989	72,900	5,542,782	21,086,671
Lao PDR	30,002	547,300	3,981	581,283	365,444	132,844	82,996	581,283
Malaysia	-	316	1,691,366*	1,691,682	1,690,566*	1,117*	-	1,691,682
Myanmar	1,877,607	2,465,017	4,300*	4,346,924	830,977	1,810,000*	1,705,947	4,346,924
Philippines	778,270	8,000,000*	1,750,000*	10,528,270	9,800,000*	-	728,270	10,528,270
Singapore	-	-	1,625	1,625	1,577	48	-	1,625
Thailand	116,777	4,739,472	4,000,000	8,856,249	8,715,009*	1,240	140,000	8,856,249
Vietnam	917,337	4,520,016	12,013,392	17,450,745	15,863,132	484,831	1,102,782	17,450,745

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 24. Maize balance sheet of ASEAN countries in 2026

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	11,203,608	38,868,523	21,634,856	71,706,987	54,321,861	2,897,040	14,488,085	71,706,987
Brunei	-	637	383	1,020	1,020	-	-	1,020
Cambodia	1,900,831	1,048,863*	-	2,949,694	766,920	75,055	2,107,719	2,949,694
Indonesia	5,542,782	17,127,458	1,388,634	24,058,874	15,520,259	73,534	8,465,080	24,058,874
Lao PDR	82,996	725,300	12,280	820,576	367,500	296,783	156,293	820,576
Malaysia	-	60*	1,709,111*	1,709,171	1,708,752*	419*	-	1,709,171
Myanmar	1,705,947	2,499,190*	3,600*	4,061,524	850,000*	1,890,000*	1,468,737	4,208,737
Philippines	728,270	8,000,000*	1,850,000*	10,578,270	9,880,000*	-	698,270	10,578,270
Singapore	-	-	1,670	1,670	1,596	74	-	1,670
Thailand	140,000	4,925,614	4,000,000*	9,065,614	8,800,000*	1,240*	264,374	9,065,614
Vietnam	1,102,782	4,541,400	12,669,178	18,313,361	16,425,813	559,936	1,327,612	18,313,361

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 25. Ratio of maize production to domestic utilization in ASEAN countries (self-sufficiency ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	36,584,473	52,640,133	69.50	37,656,134	53,431,664	70.48	38,868,523	54,321,861	71.55
Brunei	578	925	62.46	607	971	62.46	637	1,020	62.46
Cambodia	1,221,418	587,827	207.79	1,070,892	692,998	154.53	1,048,863	766,920	136.76
Indonesia	15,123,513	14,734,308	102.64	16,312,514	15,470,989	105.44	17,127,458	15,520,259	110.36
Lao PDR	515,300	345,388	149.19	547,300	365,444	149.76	725,300	367,500	197.36
Malaysia	1,657	1,672,485	0.10	316	1,690,566	0.02	60	1,708,752	0.00
Myanmar	2,596,618	843,095	307.99	2,465,017	830,977	296.64	2,499,190	850,000	276.70
Philippines	8,162,270	9,600,000	85.02	8,000,000	9,800,000	81.63	8,000,000	9,880,000	80.97
Singapore	-	1,614	-	-	1,577	-	-	1,596	-
Thailand	4,560,970	8,717,431	52.32	4,739,472	8,715,009	54.38	4,925,614	8,800,000	55.97
Vietnam	4,402,150	16,137,058	27.28	4,520,016	15,863,132	28.49	4,541,400	16,425,813	27.65

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 26. Ratio of maize beginning stock to domestic utilization in ASEAN countries (food security ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	4,717,601	52,640,133	8.96	8,893,582	53,431,664	16.64	11,203,608	54,321,861	20.62
Brunei	-	925	-	-	971	-	-	1,020	-
Cambodia	1,039,456	587,827	176.83	1,594,486	692,998	230.09	1,900,831	766,920	247.85
Indonesia	956,330	14,734,308	6.49	3,579,102	15,470,989	23.13	5,542,782	15,520,259	35.71
Lao PDR	96,077	345,388	27.82	30,002	365,444	8.21	82,996	367,500	22.58
Malaysia	-	1,672,485	-	-	1,690,566	-	-	1,708,752	-
Myanmar	1,466,711	843,095	173.97	1,877,607	830,977	225.95	1,705,947	850,000	200.70
Philippines	432,000	9,600,000	4.50	778,270	9,800,000	7.94	728,270	9,880,000	7.37
Singapore	-	1,614	-	-	1,577	-	-	1,596	-
Thailand	174,467	8,717,431	2.00	116,777	8,715,009	1.34	140,000	8,800,000	1.59
Vietnam	552,560	16,137,058	3.42	917,337	15,863,132	5.78	1,102,782	16,425,813	6.71

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 27. Quantity and value of maize exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	Thailand	30,798	8,623,440	51,330	14,372,400	-	-	51,330	14,372,400
	Vietnam	20,532	5,748,960						
Indonesia	Malaysia	16	18,902	431	904,049	3	1,612	434	905,661
	Philippines	0.0031	33						
	Singapore	209	174,781						
	Thailand	106	360,334						
	Vietnam	100	350,000						
Lao PDR	Thailand	58,193	10,526,800	113,712	21,703,921	19,132	6,318,400	132,844	28,022,321
	Vietnam	55,519	11,177,121						
Malaysia	Cambodia	3	2,768	276	106,522	4	23,320	279	129,842
	Indonesia	122	39,851						
	Philippines	20	11,948						
	Singapore	30	22,729						
	Thailand	100	29,226						
Myanmar	Philippines	7,515	1,933,000	766,098	200,437,000	0	0	766,098	200,437,000
	Singapore	46	12,000						
	Thailand	758,537	198,492,000						
Philippines	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	216.00	6,311	216	6,311
Vietnam	Cambodia	-	6,716,307	-	46,464,645	-	1,252,304	-	47,716,949
	Lao PDR	-	1,977,130						
	Philippines	-	37,771,208						

Remark: - is noted that the value is **Not Applicable**.

Table 28. Quantity and value of maize imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	0.0010	29	79	490,103	249,333	63,788,577	249,412	64,278,680
	Philippines	19.18	67,178						
	Singapore	0.0030	56						
	Thailand	60	422,841						
Lao PDR	Thailand	1,558	448,195	2,074	613,140	1,907	608,691	3,981	1,221,831
	Vietnam	516	164,945						
Malaysia	Indonesia	39.50	14,164	122,743	79,760,332	234,879.02	128,201,706	357,622	207,962,038
	Thailand	309	182,102						
Myanmar	-	-	-	-	-	15	50,000	15	50,000
Philippines	-	-	-	-	-	-	-	-	-
Singapore	Indonesia	627	526,605	965	899,591	660	1,397,928	1,625	2,297,519
	Malaysia	312	322,745						
	Philippines	1.80	1,020						
	Thailand	24	49,204						
	Vietnam	0.75	18						
Thailand	Cambodia	8,813	2,837,526	3,970	2,318,280	4,695	5,487,627	8,665	7,805,907
	Lao PDR	158,622	42,015,818						
	Myanmar	809,480	239,986,293						
Vietnam	Lao PDR	42,051	9,460,750	-	779,047,794	-	76,989,745	-	856,037,540
	Thailand	1,463	5,574,008						

Remark: - is noted that the value is **Not Applicable**.

Table 29. FOB prices of maize in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia	Not specified	2024	305	305	304	304	250	240	230	250	257	240	257	280	269
		2025	240	276	240	250	238	239	-	-	-	-	-	-	247
Indonesia	HS-code 10059091 and 10059099	2024	829	500	677	1,168	664	835	279	276	814	754	813	840	704
		2025	529	835	892	837	-	-	-	-	-	-	-	-	773
Lao PDR	Grade B	2024	283	180	173	201	179	129	186	249	120	254	257	275	207
		2025	229	253	187	195	-	-	-	-	-	-	-	-	216
Malaysia	- HS-code 1005100000	2024	2,363	349	231	1,945	2,172	1,274	4,769	899	1,372	2,090	305	1,506	1,506
		2025	434	817	-	-	-	-	-	-	-	-	-	526	526
	- HS-code 1103130000	2024	629	741	423	1,019	306	315	308	316	381	755	373	526	526
Myanmar	Not specified	2025	383	839	-	-	-	-	-	-	-	-	-	539	539
		2024	245	241	230	225	225	235	251	261	267	254	258	260	246
		2025	181	259	260	254	-	-	-	-	-	-	-	-	239
Thailand	Not specified	2024	299	294	291	281	296	336	348	354	336	303	293	314	312
		2025	318	320	318	316	332	352	-	-	-	-	-	-	326

Remark: - is noted that the value is **Not Applicable**.

Table 30. CIF prices of maize in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS-code 10059091 and 10059099	2024	271	290	275	260	249	235	247	242	238	238	238	240	252
		2025	-	252	259	250	-	-	-	-	-	-	-	-	254
Lao PDR	Grade A	2024	298	321	384	313	500	312	401	297	385	302	242	317	339
		2025	267	387	271	266	-	-	-	-	-	-	-	-	298
Malaysia	-HS-code 1005100000	2024	252	257	275	250	251	233	266	262	259	230	229	247	251
		2025	340	265	276	-	-	-	-	-	-	-	-	-	294
	- HS-code 1103130000	2024	414	403	370	580	426	287	349	345	498	475	568	471	432
		2025	486	542	497	-	-	-	-	-	-	-	-	-	508
Myanmar	Not specified	2024	-	4,590	3,021	3,778	4,024	4,690	5,451	7,089	3,936	3,995	3,865	3,954	4,399
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
Singapore	Not specified	2024	811	799	729	791	821	782	788	819	783	759	688	735	775
		2025	701	633	699	609	669	595	614	600	651	831	701	711	668
Vietnam	Not specified	2024	255	255	248	253	247	243	241	240	233	233	239	244	244
		2025	250	259	266	262	267	-	-	-	-	-	-	-	261

Remark: - is noted that the value is **Not Applicable**.

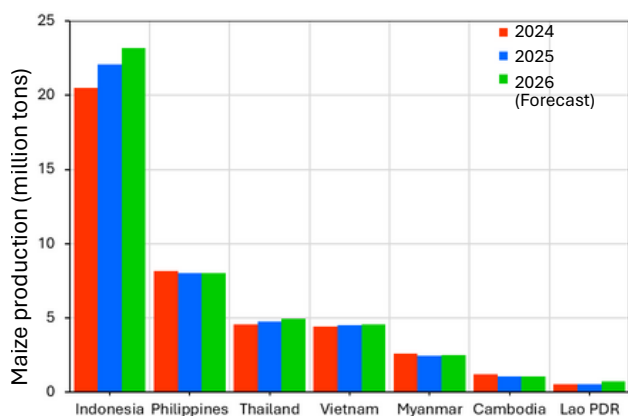


Figure 16. Maize production of selected countries in ASEAN in 2024-2026

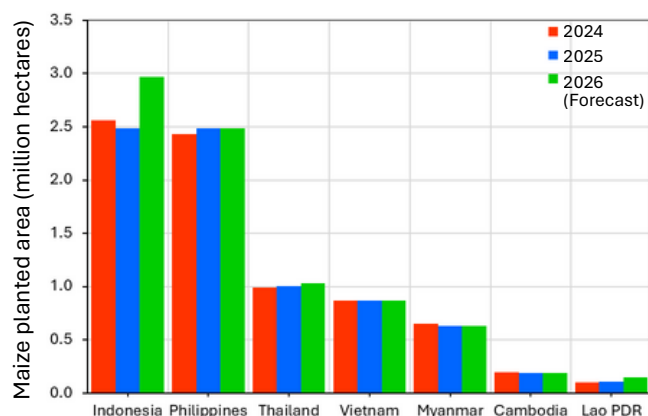


Figure 17. Maize planted area of selected countries in ASEAN in 2024-2026

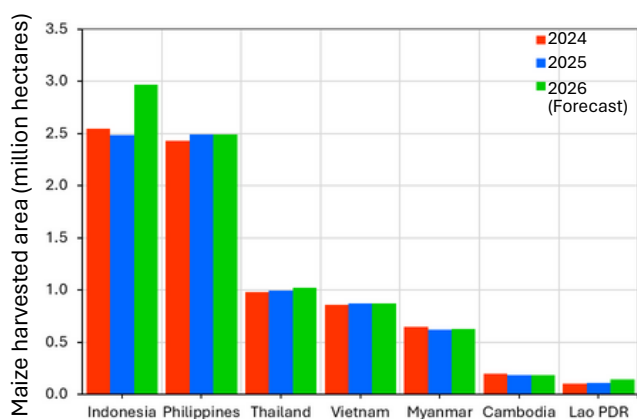


Figure 18. Maize harvested area of selected countries in ASEAN in 2024-2026

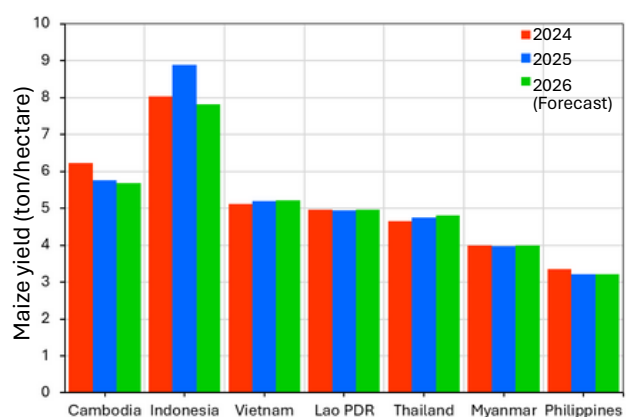


Figure 19. Maize yield of selected countries in ASEAN in 2024-2026

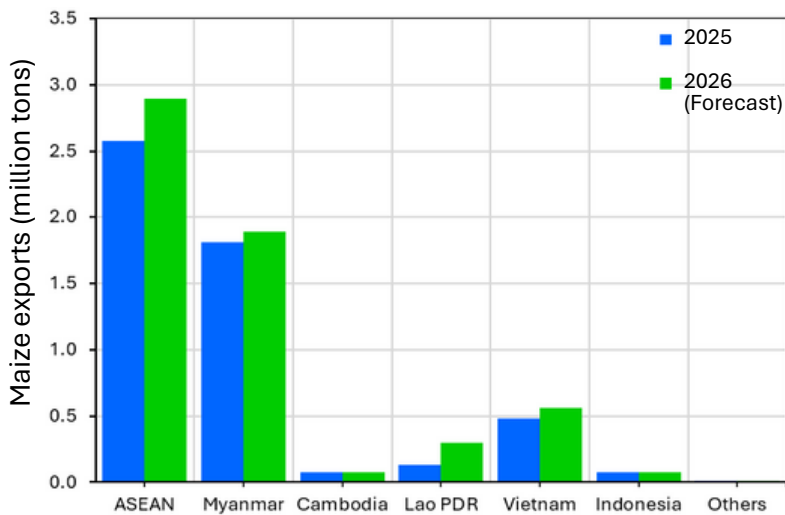


Figure 20. Amount of maize exports of selected countries in ASEAN in 2025-2026

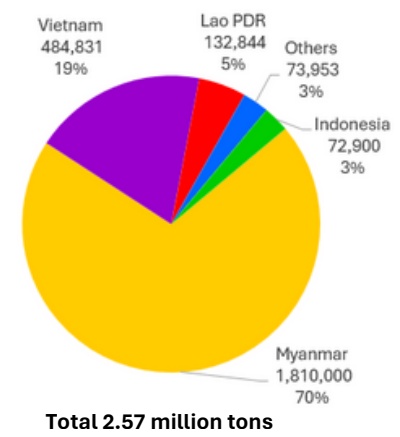


Figure 21. Share of maize exports (tons) among ASEAN countries in 2025

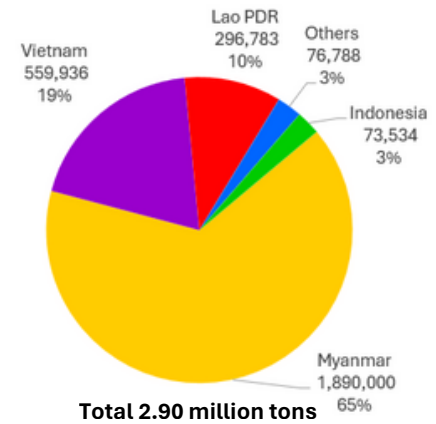


Figure 22. Share of maize exports (tons) among ASEAN countries in 2026

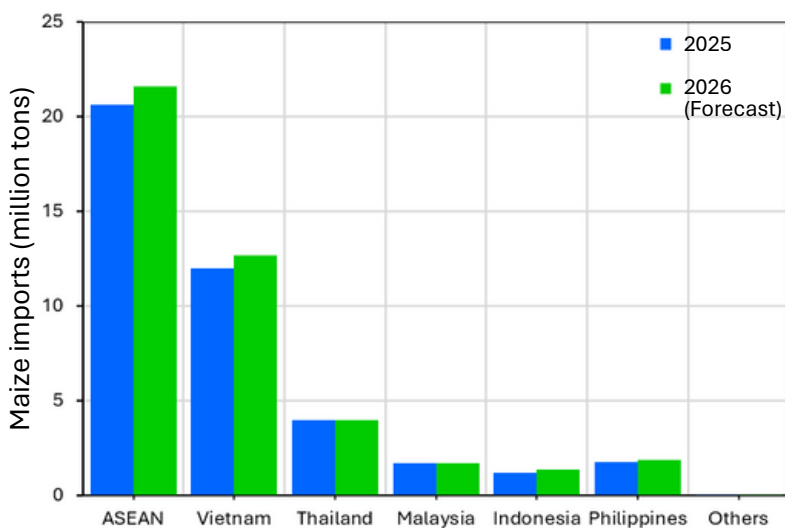


Figure 23. Amount of maize imports of selected countries in ASEAN in 2025-2026

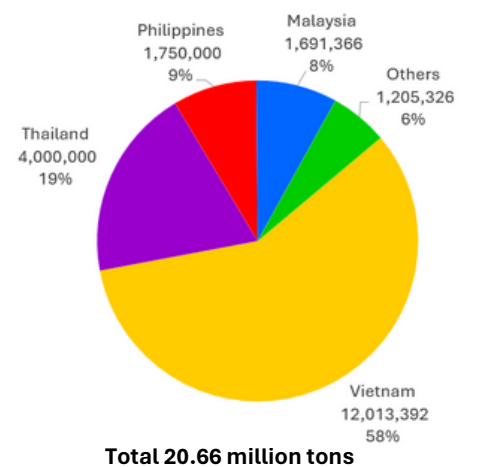


Figure 24. Share of maize imports (tons) among ASEAN countries in 2025

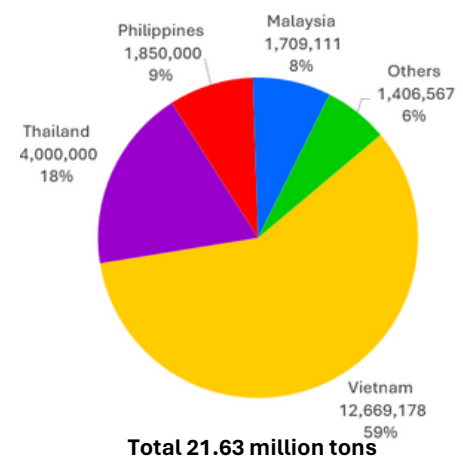


Figure 25. Share of maize imports (tons) among ASEAN countries in 2026

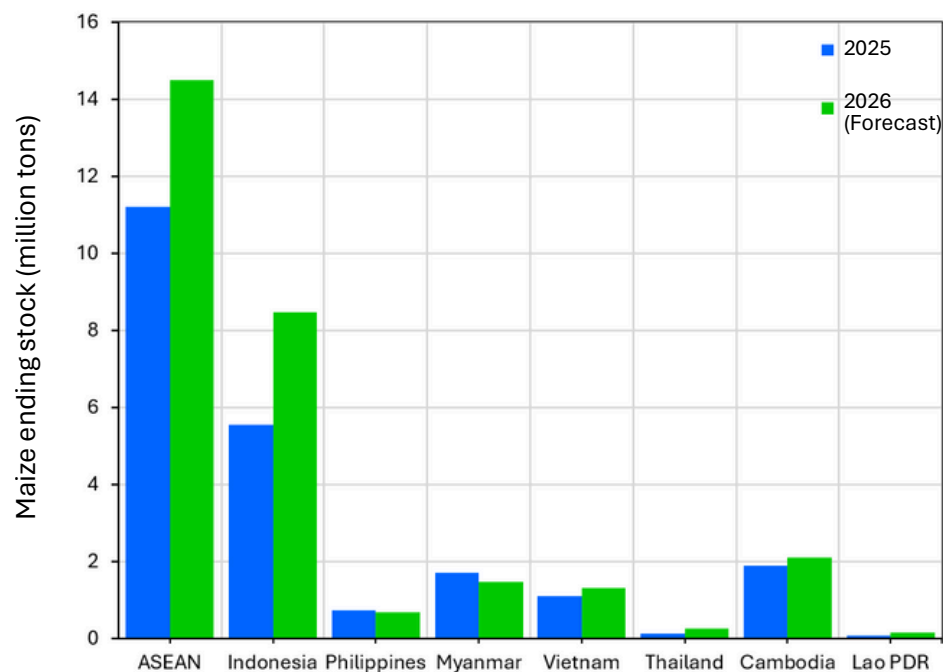


Figure 26. Amount of ending stock of maize in ASEAN in 2025-2026

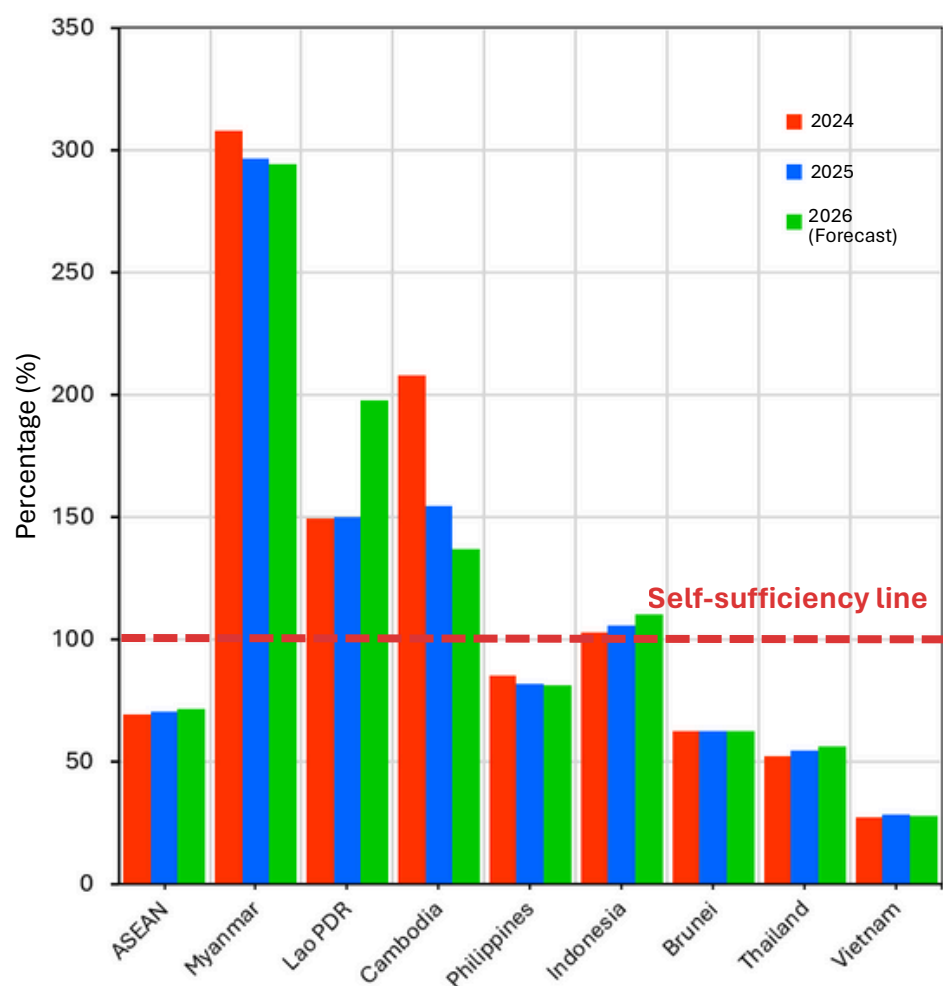


Figure 27. Ratio of maize production to domestic utilization in ASEAN in 2024-2026

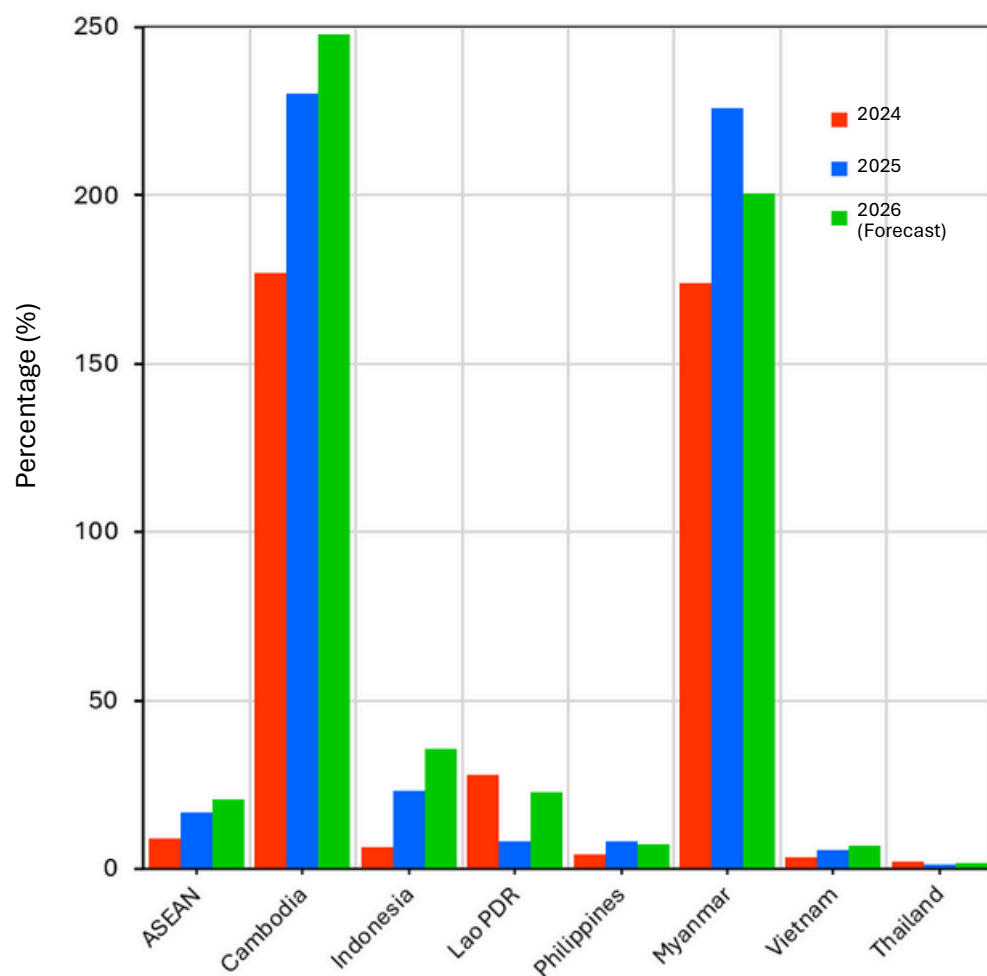


Figure 28. Ratio of maize beginning stock to domestic utilization in ASEAN in 2024-2026

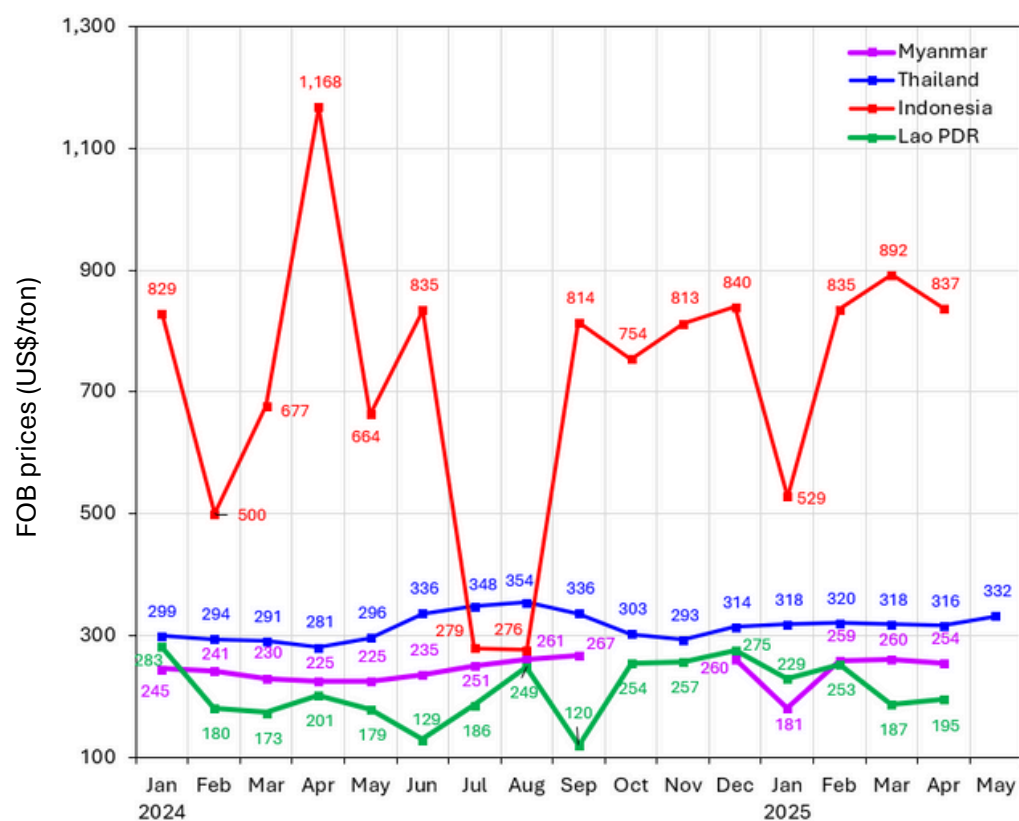


Figure 29. FOB prices (US\$/ton) of maize of selected countries in ASEAN in 2024-2025

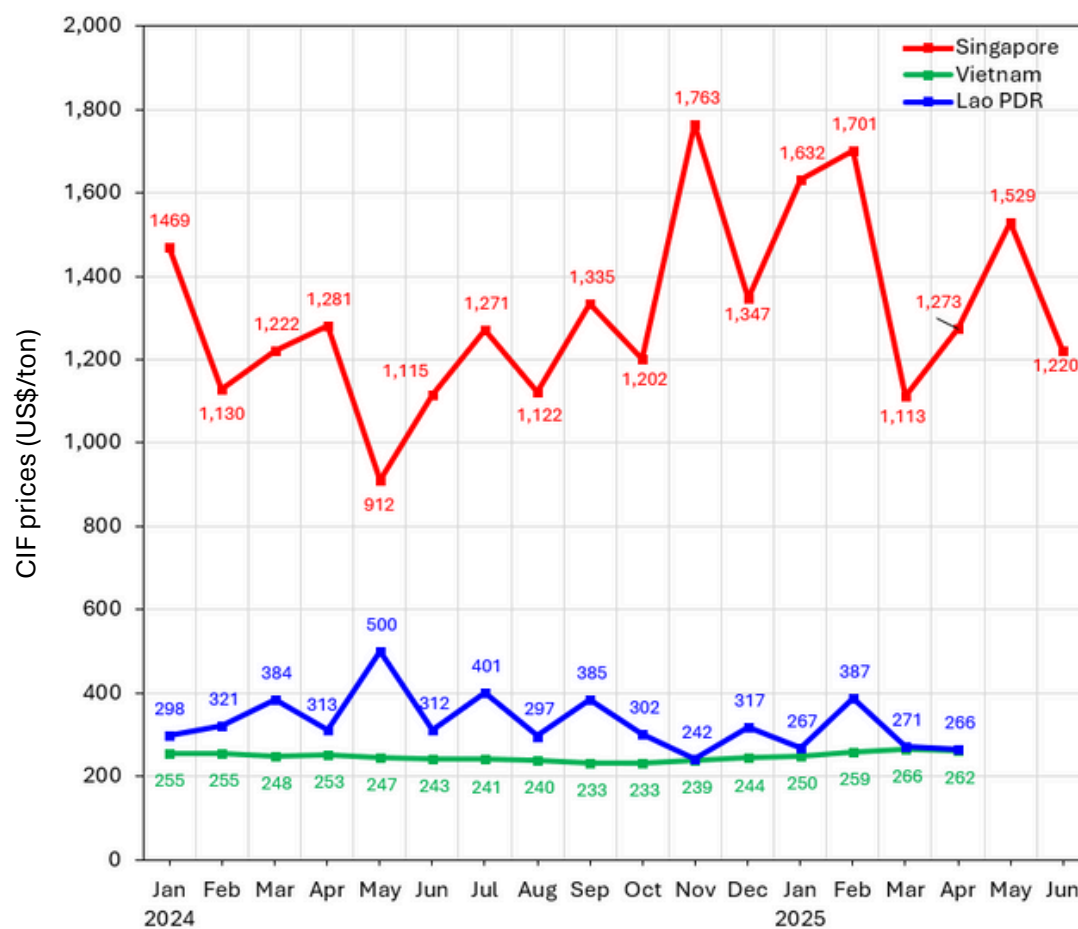


Figure 30. CIF prices (US\$/ton) of maize of selected countries in ASEAN in 2024-2025

Sugarcane Outlook for 2026

Highlights

ASEAN sugar supply is forecast to increase by approximately 1.92 million tons, or 4.44 percent, from 43.25 million tons in 2025 to 45.17 million tons in 2026, due to the increase in beginning stock, production, and import (Table 31).

The beginning stock of sugar is forecast to increase by 0.73 million tons, or 4.09 percent, from 17.83 million tons in 2025 to 18.56 million tons in 2026. The sugar production is forecast to increase by 1.03 million tons, or 6.18 percent, from 16.66 million tons in 2025 to 17.69 million tons in 2026. The sugar import in 2026 is forecast to slightly increase by approximately 0.17 million tons, or 1.94 percent, from 8.75 million tons in 2025 to 8.92 million tons in 2026.

ASEAN sugar demand is forecast to increase by the export and ending stock. The sugar export is forecast to increase by 0.43 million tons, or 5.42 percent, from 7.93 million tons in 2025 to 8.36 million tons in 2026. The domestic utilization of sugar from ASEAN in 2026 is expected to decline by 0.48 million tons, or 2.87 percent, from 16.75 million tons in 2025 to 16.27 million tons in 2026. The ending stock is forecast to rise by 1.98 million tons or, 10.67 percent, from 18.56 million tons in 2025 to 20.54 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2026 is forecast to be 108.73 percent, which increases from 99.45 percent in 2025.

The beginning stock to domestic utilization ratio (food security ratio) in 2026 is forecast to be 114.06 percent, which increases from 106.41 percent in 2025.

Table 31. Summary of the ASEAN sugar situation in 2025-2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	43.25	45.17	1.92	4.44
• Beginning stock	17.83	18.56	0.73	4.09
• Production	16.66	17.69	1.03	6.18
• Import	8.75	8.92	0.17	1.94
Demand (Million tons)	43.25	45.17	1.92	4.44
• Domestic utilization	16.75	16.27	-0.48	-2.87
• Export	7.93	8.36	0.43	5.42
• Ending stock	18.56	20.54	1.98	10.67
Ratio of production to domestic utilization (%)	99.45	108.73	9.28	-
Ratio of beginning stock to domestic utilization (%)	106.41	114.06	7.65	-

ASEAN Sugarcane Situation in 2025



Production

The sugarcane production in ASEAN for 2025 (crop year 2024/25) is at 182.34 million tons, representing an increase of 16.25 million tons, or 9.78 percent, compared to 166.10 million tons in 2024 (crop year 2023/2024) (Table 32, Figure 31). The countries that show an increase in production include Indonesia, Lao PDR, the Philippines, Thailand, and Vietnam. However, productions decrease in Cambodia and Myanmar are affected by the reduction in harvested area and yield.

For Brunei Darussalam in 2025, the production is estimated to increase. Meanwhile, the information on the planted area and yield is not available.

For Cambodia in 2025, the decrease in the production is attributed to a decrease in yield. The increase in planted area is driven by the rising sugarcane prices and the declining prices of competing crops.

For Indonesia in 2025, the increase in production is attributed to a rise in planted area and yield. The increase in planted area is driven by favorable weather conditions and government policies. The increase in yield is influenced by favorable weather conditions and farmers' practice improving crop management.

For Lao PDR in 2025, the increase in production is due to the expansion in planted area. The increase in planted area is driven by the rising sugarcane prices and government policies. Meanwhile, the yield is decreased as farmers apply less fertilizer.

For Myanmar in 2025, the production is decreased due to the decrease in planted area and yield. The decrease in planted area is due to the declining sugarcane prices and government policies. Additionally, the yield is also decreased due to the damage from floods.

For Thailand in 2025, the increase in production is attributed to planted area and yield. The increase in planted areas is due to rising sugarcane prices and government policies. Moreover, the increase in yield is attributed to favorable weather conditions, specifically sufficient water resources.

For Vietnam in 2025, the production is expected to increase due to the increase in planted area and yield. The increase in planted area is caused by favorable weather conditions. Additionally, yield is estimated to be unchanged.



Utilization and Stock

The domestic utilization of sugar in ASEAN increases by 0.43 million tons, or 2.70 percent, from 16.32 million tons in 2024 to 16.76 million tons in 2025 (Tables 37-38). The beginning stock of sugar in ASEAN increased by 3.62 million tons, or 25.49 percent, from 14.21 million tons in 2024 to 17.83 million tons in 2025. The ending stock of sugar in ASEAN is expected to increase by 0.73 million tons, or 4.10 percent, from 17.83 million tons in 2024 to 18.56 million tons in 2025.

The ratio of sugar production to domestic utilization (self-sufficiency ratio) in 2025 increases to 99.45 percent, compared to 95.46 percent in 2024. This indicates that ASEAN produced adequate sugar for regional consumption (Table 40, Figure 42). Moreover, on a country-by-country basis, sugar production in Cambodia, Lao PDR, Myanmar, the Philippines, and Thailand exceeds the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (food security ratio) in 2025 is 106.41 percent, compared to 87.08 percent in 2024. This indicates that sugar availability in the region increased from the previous year (Table 41, Figure 43).

The sugar is also an alternative food ingredient for people in many countries in the world, which are facing food crises. 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 the ASEAN region. Thus, these countries will earn high revenue from their export.

When comparing ASEAN's sugarcane production and market dynamics to the global trends, ASEAN stands out as a region of strong growth and improving self-sufficiency. While global sugar production has declined by 5.9 million tons, driven largely by India's poor crop and limited irrigation², ASEAN sugarcane production has increased by 16.25 million tons, or nearly 10 percent year-over-year. Countries such as Thailand, Indonesia, Vietnam, and the Philippines have driven this growth, offsetting small declines in Cambodia and Myanmar. Moreover, ASEAN's domestic sugar utilization and ending stocks have increased, and the self-sufficiency ratio has risen to 99.45 percent, indicating near-complete regional production coverage for consumption needs.

This contrasts with global trends where stocks have fallen sharply—notably in India and Pakistan—leading to supply tightness. Importantly, ASEAN's sugar exports have surged by 44.25 percent, positioning the region as a rising export contributor, while imports have declined, showing increasing regional resilience. In a global context marked by uneven supply and shifting trade patterns, ASEAN's performance suggests a more stable and self-reliant regional sugar economy, with growing potential to supply neighboring markets facing deficits.



Trade

ASEAN's sugar exports increase in 2025 by 2.43 million tons, or 44.25 percent, from 5.50 million tons in 2024 to 7.93 million tons (Tables 37-38, Figures 35-36). In terms of imports, ASEAN as a whole imports approximately 8.75 million tons of sugar in 2025, a decrease from 9.86 million tons in 2024 (Tables 37-38, Figures 37-38).

The quantity and value of sugar exports by destination countries and the quantity and value of sugar imports by origin countries are provided in Tables 42 and 43, respectively.



Prices

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2024-2025 are represented in Tables 44-45. Thailand is the biggest of exporter in ASEAN countries for raw sugar. The average of Thailand's FOB prices in 2025 for raw sugar is estimated at 452 US\$ per ton (January-April). Lao PDR, as the white sugar exporter, is estimated at 562 US\$ per ton (January-May).

Reference:

2. Sugar: World markets and trade [Internet]. United States Department of Agriculture Foreign Agricultural Service (USDA). 2025 [cited 2025 July 29]. Available from: <https://www.fao.org/worldfoodsituation/csdb>.



Damaged Area

The damaged area of sugarcane in 2025 is estimated to be 28,317 hectares. Of this, 36 hectares are caused by floods in Myanmar. Unspecified types of damages are observed in Cambodia of 28,281 hectares (Table 36).

Prospects for Sugarcane in 2026



Production

Sugarcane production in ASEAN is forecast to increase by 5.17 million tons, or 2.83 percent, from 182.34 million tons in 2025 to 187.51 million tons in 2026 (Tables 32-35, Figures 31-34). The sugarcane production trends for 2026 in ASEAN countries depict a mixed scenario. In Cambodia, Indonesia, Thailand, and Vietnam are expected to increase in sugarcane production. On the other hand, Lao PDR and Myanmar are expected to decrease in sugarcane production. Thailand is the largest sugar-producing country in the region, which is forecast to increase its production from 93.94 million tons in 2025 to 98.64 million tons in 2026.

For Indonesia in 2026, the production is expected to increase due to the increase in planted area due to favorable weather conditions and government policies. The yield is also expected to increase due to favorable weather conditions.

For Lao PDR in 2026, the production is expected to decrease due to the decrease in planted area and yield. The decrease in planted area is due to government policies. The yield is expected to decrease as farmers may use less available fertilizer.

For Vietnam in 2026, the production is expected to increase due to the expansion in planted area. The planted area is expected to increase due to favorable weather conditions. The yield is expected to remain similar to the previous year.



Utilization and Stock

The domestic utilization of sugar in ASEAN is forecast to decrease from 16.75 million tons in 2025 to 16.27 million tons in 2026, reflecting a decrease of 0.48 million tons, or 2.88 percent (Tables 38-39). The beginning stock in ASEAN is estimated at 18.56 million tons of sugar in 2026, an increase of 0.73 million tons, or 4.10 percent, from 17.83 million tons in 2025.

The ending stock of sugar in ASEAN is forecast to reach 20.54 million tons in 2026, marking an increase of 1.98 million tons, or 10.68 percent, from around 18.56 million tons in 2025.

The ratio of production to domestic utilization in 2026 is forecast to be 108.73 percent, up from 99.45 percent in the previous year (Table 40, Figure 42).

The ratio of the beginning stock to domestic utilization in 2026 is forecast to be 114.06 percent, an increase from 106.41 percent in 2025 (Table 41, Figure 43).



Trade

The export is predicted to increase from 7.93 million tons in 2025 to 8.36 million tons in 2026 (Tables 38-39, Figures 35-37). The import is expected to be 8.92 million tons in 2026, which is an increase from 8.75 million tons in 2025 (Tables 38-39, Figures 38-40).

Table 32. Sugarcane production in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	166,096.93	182,342.90	16,245.97	9.78	187,508.38	5,165.48	2.83
Brunei	0.056	0.057	0.00	1.92	0.060	0.00	5.00
Cambodia	2,039.64	1,621.11	-418.53	-20.52	1,914.84	293.74	18.12
Indonesia	33,216.61	36,721.80	3,505.19	10.55	37,032.79	310.99	0.85
Lao PDR	1,643.60	1,723.00	79.40	4.83	1,600.00	-123.00	-7.14
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	11,592.61	11,537.09	-55.51	-0.48	11,267.73*	-269.36	-2.33
Philippines	20,564.71	24,000.00*	3,435.29	16.70	24,000.00*	0.00	0.00
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	84,494.75	93,944.00	9,449.24	11.18	98,641.20*	4,697.20	5.00
Vietnam	12,544.94	12,795.84	250.90	2.00	13,051.76	255.92	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 33. Sugarcane planted area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	2,883.27	3,003.18	119.91	4.16	3,054.52	51.34	1.71
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	45.25	64.65	19.39	42.85	66.58	1.94	3.00
Indonesia	520.82	522.02	1.20	0.23	526.44	4.42	0.85
Lao PDR	33.30	35.00	1.70	5.11	33.00	-2.00	-5.71
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	170.27	169.68	-0.59	-0.35	163.92*	-5.77	-3.40
Philippines	399.22*	424.00*	24.78	6.21	425.00*	1.00	0.24
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,529.15	1,598.88	69.72	4.56	1,646.84	47.97	3.00
Vietnam	185.25	188.96	3.71	2.00	192.73	3.78	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 34. Sugarcane harvested area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	2,878.17	2,974.87	96.70	3.36	3,030.72	55.85	1.88
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	45.15	36.36	-8.78	-19.45	45.23	8.87	24.38
Indonesia	520.82	522.02	1.20	0.23	526.44	4.42	0.85
Lao PDR	33.30	35.00	1.70	5.11	33.00	-2.00	-5.71
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	165.28	169.65	4.37	2.64	161.47*	-8.18	-4.82
Philippines	399.22	424.00*	24.78	6.21	425.00*	1.00	0.24
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,529.15	1,598.88	69.72	4.56	1,646.84*	47.97	3.00
Vietnam	185.25	188.96	3.71	2.00	192.73	3.78	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 35. Sugarcane yield in ASEAN countries in 2024 – 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	57.71	61.29	3.58	6.20	61.87	0.58	0.95
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	45.18	44.58	-0.60	-1.33	42.34	-2.24	-5.02
Indonesia	63.78	70.35	6.57	10.30	70.35	0.00	0.00
Lao PDR	49.36	49.23	-0.13	-0.26	48.48	-0.75	-1.52
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	70.14	68.01	-2.13	-3.04	69.78*	1.77	2.60
Philippines	51.51	56.60*	5.09	9.88	56.47*	-0.13	-0.23
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	55.26	58.76	3.50	6.33	59.90*	1.14	1.94
Vietnam	67.72	67.72	0.00	0.00	67.72	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 36. Sugarcane damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectares

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	36.00	-	-	-	-	28,281.00	28,317.00
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	28,281.00	28,281.00
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	36.00	-	-	-	-	-	36.00
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: - refers to data that is **Not Applicable**.

Table 37. Sugar balance sheet of ASEAN countries in 2024

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	14,207,054	15,574,320	9,860,729	39,642,102	16,314,957	5,498,730	17,828,416	39,642,102
Brunei	1,587	-	4,200	5,787	5,245	-	542	5,787
Cambodia	-	203,964	-	203,964	130,696	73,268*	-	203,964
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	195,799	328,720	376,276	900,795	268,968	449,156	182,671	900,795
Malaysia	-	-	2,390,312	2,390,312	2,146,604*	243,709	-	2,390,312
Myanmar	215,607	926,713	78,000	1,220,320	727,760	115,000	377,560	1,220,320
Philippines	561,881	1,561,155	228,666	2,351,702	1,809,722	24,179	517,801	2,351,702
Singapore	-	-	202,850	202,850	129,695	73,155	-	202,850
Thailand	11,356,227	9,028,264	451,656	20,836,147	2,500,000	4,120,171	14,215,976	20,836,147
Vietnam	765,436	1,254,494	1,059,313	3,079,244	1,982,880	218,218	878,146	3,079,244

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 38. Sugar balance sheet of ASEAN countries in 2025

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	17,828,416	16,662,136	8,754,861	43,245,413	16,754,784	7,930,766	18,559,862	43,245,413
Brunei	542	-	5,024	5,566	5,111	-	455	5,566
Cambodia	-	162,111	-	162,111	136,666	25,445*	-	162,111
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	182,671	344,600	171,549	698,820	262,371	181,013	255,436	698,820
Malaysia	-	-	2,167,346*	2,167,346	1,910,090*	257,256*	-	2,167,346
Myanmar	377,560	922,275	70,000*	1,369,835	750,457*	120,000*	499,378	1,369,835
Philippines	517,801	1,505,709	300,000*	2,323,510	1,670,000*	36,100	617,410	2,323,510
Singapore	-	-	193,981	193,981	111,494	82,487	-	193,981
Thailand	14,215,976	10,037,916	344,649*	24,598,541	2,500,000	6,898,107*	15,200,434	24,598,541
Vietnam	878,146	1,279,584	815,353	2,973,083	2,002,709	177,186	793,188	2,973,083

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 39. Sugar balance sheet of ASEAN countries in 2026

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	18,559,862	17,692,510	8,921,261	45,173,633	16,272,387	8,358,705	20,542,541	45,173,633
Brunei	455	-	5,024	5,479	5,162	-	317	5,479
Cambodia	-	191,484	-	191,484	137,681	53,803*	-	191,484
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	255,436	320,000	270,129	845,565	246,000	480,767	118,798	845,565
Malaysia	-	-	2,185,632*	2,185,632	1,936,132*	249,500*	-	2,185,632
Myanmar	499,378	900,742*	70,000*	1,470,121	800,000*	120,000*	550,121	1,470,121
Philippines	617,410	2,000,000*	300,000*	2,917,410	1,535,000*	40,000*	1,342,410	2,917,410
Singapore	-	-	198,415	198,415	120,594	77,821	-	198,415
Thailand	15,200,434	10,539,812*	260,000*	26,000,246	2,500,000*	7,000,000*	16,500,246	26,000,246
Vietnam	793,188	1,305,176	945,102	3,043,467	2,022,736	183,642	837,089	3,043,467

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 40. Ratio of sugar production to domestic utilization in ASEAN countries (self-sufficiency ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	15,574,320	16,314,957	95.46	16,662,136	16,754,784	99.45	17,692,510	16,272,387	108.73
Brunei	-	5,245	0.00	-	5,111	0.00	-	5,162	0.00
Cambodia	203,964	130,696	156.06	162,111	136,666	118.62	191,484	137,681	139.08
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	328,720	268,968	122.22	344,600	262,371	131.34	320,000	246,000	130.08
Malaysia	-	2,146,604	0.00	-	1,910,090	0.00	-	1,936,132	0.00
Myanmar	926,713	727,760	127.34	922,275	750,457	122.90	900,742	800,000	112.59
Philippines	1,561,155	1,809,722	86.26	1,505,709	1,670,000	90.16	2,000,000	1,535,000	130.29
Singapore	-	129,695	0.00	-	111,494	0.00	-	120,594	0.00
Thailand	9,028,264	2,500,000	361.13	10,037,916	2,500,000	401.52	10,539,812	2,500,000	421.59
Vietnam	1,254,494	1,982,880	63.27	1,279,584	2,002,709	63.89	1,305,176	2,022,736	64.53

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 41. Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	14,207,054	16,314,957	87.08	17,828,416	16,754,784	106.41	18,559,862	16,272,387	114.06
Brunei	1,587	5,245	30.25	542	5,111	10.60	455	5,162	8.82
Cambodia	-	130,696	0.00	-	136,666	0.00	-	137,681	0.00
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	195,799	268,968	72.80	182,671	262,371	69.62	255,436	246,000	103.84
Malaysia	-	2,146,604	0.00	-	1,910,090	0.00	-	1,936,132	0.00
Myanmar	215,607	727,760	29.63	377,560	750,457	50.31	499,378	800,000	62.42
Philippines	561,881	1,809,722	31.05	517,801	1,670,000	31.01	617,410	1,535,000	40.22
Singapore	-	129,695	0.00	-	111,494	0.00	-	120,594	0.00
Thailand	11,356,227	2,500,000	454.25	14,215,976	2,500,000	568.64	15,200,434	2,500,000	608.02
Vietnam	765,436	1,982,880	38.60	878,146	2,002,709	43.85	793,188	2,022,736	39.21

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 42. Quantity and value of sugar exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	Vietnam	6,138	196,419	6,138	196,419	2,001,600	64,051,200	2,007,738	64,247,619
Indonesia	Brunei	6	7,759	1,807	1,168,295	14,033	9,727,356	15,840	10,895,651
	Malaysia	1,241	785,445						
	Philippines	5	8,901						
	Singapore	530	348,686						
	Thailand	0.0015	1						
	Vietnam	25	17,503						
Lao PDR	Vietnam	174,300	95,573,521	174,300	95,573,521	6,713	3,941,495	181,013	99,515,016
Malaysia	Cambodia	625	355,817	15,289	8,896,064	9,938	6,165,928	25,227	15,061,992
	Indonesia	651	382,625						
	Philippines	1,500	858,820						
	Singapore	7,092	4,241,164						
	Thailand	21	27,842						
	Vietnam	5,400	3,029,796						
Myanmar	-	-	-	-	-	1,846	74,000	1,846	74,000
Philippines	-	-	-	-	-	36,100	23,840,964	36,100	23,840,964
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	2,527	1,825,320	2,216,963	1,082,981,623	833,264	426,989,593	3,050,227	1,509,971,216
	Cambodia	426,669	228,306,629						
	Indonesia	1,220,746	552,907,863						
	Lao PDR	173,812	93,673,149						
	Malaysia	96,287	52,350,253						
	Myanmar	46,804	32,777,900						
	Philippines	82,218	28,359,329						
	Singapore	48,495	29,821,193						
	Vietnam	119,405	62,959,987						
Vietnam	Brunei	-	26,334	-	28,067,807	-	86,428,033	-	114,495,840
	Cambodia	-	1,970,847						
	Indonesia	-	1,948,016						
	Lao PDR	-	553,115						
	Malaysia	-	4,416,219						
	Philippines	-	11,500,240						
	Singapore	-	783,606						
	Thailand	-	6,869,431						

Remark: - is noted that the value is **Not Applicable**.

Table 43. Quantity and value of sugar imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	2,750	1,514,019	969,307	499,462,138	364,715	194,011,954	1,334,022	693,474,092
	Singapore	0.59	348						
	Thailand	966,557	497,947,771						
Lao PDR	Thailand	171,000	82,987,761	171,021	82,997,658	-	-	171,021	82,997,658
	Vietnam	21	9,897						
Malaysia	Philippines	2,725	1,193,842	46,296	27,600,930	332,566	179,901,174	378,861	207,502,104
	Indonesia	5	9,953						
	Singapore	0.87	916						
	Thailand	43,410	26,318,557						
	Vietnam	154	77,662						
Myanmar	-	-	-	-	-	-	-	-	-
Philippines	Indonesia	500	308,110	13,042	8,458,047	-	-	13,042	8,458,047
	Thailand	12,542	8,149,937						
Singapore	Indonesia	1,311	834,730	134,195	82,816,724	59,786	38,479,030	193,981	121,295,754
	Malaysia	24,089	15,064,866						
	Myanmar	27	7,552						
	Philippines	2.58	15,036						
	Thailand	12,542	8,149,937						
	Vietnam	2,052	1,210,963						
Thailand	Cambodia	144	378,879	75,488	41,145,649	274,949	196,457,991	350,437	237,603,640
	Indonesia	12,296	20,138,943						
	Lao PDR	28,596	3,307,684						
	Malaysia	1,520	3,394,725						
	Myanmar	1,141	446,835						
	Philippines	469	2,274,821						
	Singapore	341	1,300,397						
	Vietnam	30,982	9,903,365						
Vietnam	Cambodia	-	28,967,176	-	134,633,960	-	118,957,432	-	253,591,392
	Indonesia	-	3,260,313						
	Lao PDR	-	22,768,950						
	Malaysia	-	5,199,656						
	Myanmar	-	12,471,500						
	Philippines	-	4,739,162						
	Singapore	-	632,759						
	Thailand	-	56,594,445						

Remark: - is noted that the value is **Not Applicable**.

Table 44. FOB prices of sugar in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia	Raw sugar	2024	34	35	33	34	36	37	36	38	40	45	45	43	38
		2025	33	34	32	33	34	37	-	-	-	-	-	-	34
Indonesia	HS-code 17011400	2024	2,454	2,300	2,264	2,949	3,519	1,955	959	1,325	1,566	1,656	1,365	1,334	1,971
		2025	885	1,485	1,077	1,696	-	-	-	-	-	-	-	-	1,286
Lao PDR	White sugar grade A	2024	584	566	542	589	563	525	539	589	555	564	565	510	558
		2025	616	530	586	538	542	-	-	-	-	-	-	-	562
Malaysia	- HS-code 1701910000	2024	648	659	1900	740	725	1,210	1,126	2,159	1,618	1,148	858	1,752	1,212
		2025	1,602	1,654	1,663	-	-	-	-	-	-	-	-	-	1,640
	- HS-code 1701991000	2024	703	694	692	720	648	584	626	648	635	584	598	603	645
		2025	615	570	580	-	-	-	-	-	-	-	-	-	588
	- HS-code 1701999000	2024	6	9	3	8	9	5	7	3	4	5	6	3	6
		2025	5	4	1	-	-	-	-	-	-	-	-	-	3
Myanmar	Not specified	2024	40	40	40	0	0	0	0	0	0	0	0	0	40
		2025	0	0	62	40	-	-	-	-	-	-	-	-	51
Philippines	MUSCOVADO	2024	1,799	1,931	2,195	1,903	2,010	2,004	2,268	2,286	2,212	2,148	2,684	2,232	2,139
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
	MOLASSES	2024	187	182	219	207	246	214	223	223	204	202	181	186	206
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
Thailand	Raw sugar	2024	508	530	552	524	501	503	513	486	525	525	481	514	514
		2025	451	467	452	441	-	-	-	-	-	-	-	-	453
	White sugar	2024	658	673	667	634	633	621	608	621	609	603	588	592	626
		2025	544	534	549	544	-	-	-	-	-	-	-	-	543

Remark: - is noted that the value is **Not Applicable**.

Table 45. CIF prices of sugar in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS-code 17011400	2024	610	613	612	599	577	578	550	522	518	524	525	554	565
		2025	511	522	518	520	-	-	-	-	-	-	-	-	518
Lao PDR	White sugar	2024	499	499	490	452	476	499	490	490	480	464	459	461	480
		2025	475	500	493	496	495	-	-	-	-	-	-	-	492
Malaysia	- HS-code 1701140000	2024	618	579	589	567	559	528	566	552	558	514	555	554	562
		2025	555	548	511	-	-	-	-	-	-	-	-	-	538
	- HS-code 1701910000	2024	971	1,011	1,138	856	840	677	1,047	1,537	1,262	970	1,044	1,151	1,042
		2025	637	855	1,199	-	-	-	-	-	-	-	-	-	897
	- HS-code 1701991000	2024	721	721	708	703	712	671	688	699	689	605	622	612	679
		2025	641	604	612	-	-	-	-	-	-	-	-	-	619
Singapore	Not specified	2024	4	4	3	6	5	5	3	3	4	3	3	4	4
		2025	6	3	2	-	-	-	-	-	-	-	-	-	4
		2024	771	762	762	750	745	722	710	700	650	650	659	687	714
		2025	643	630	620	614	720	746	750	736	736	756	755	449	680

Remark: - is noted that the value is **Not Applicable**.

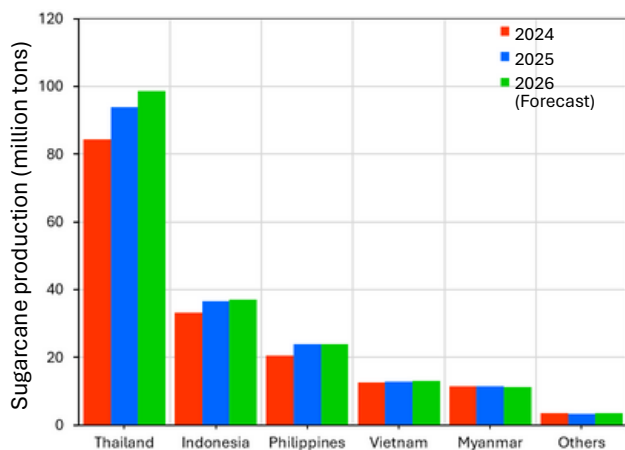


Figure 31. Sugarcane production of selected countries in ASEAN in 2024-2026

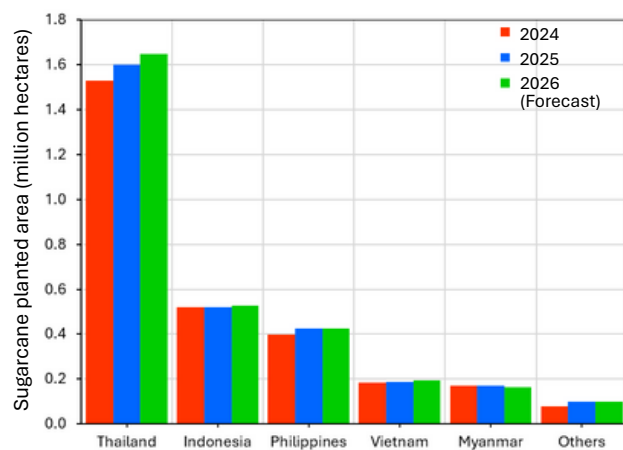


Figure 32. Sugarcane planted area of selected countries in ASEAN in 2024-2026

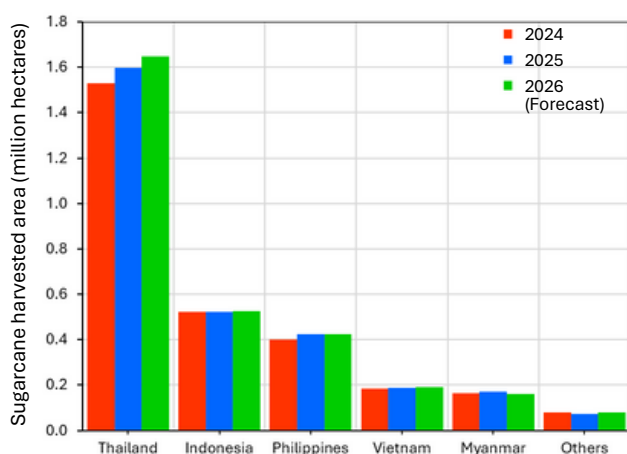


Figure 33. Sugarcane harvested area of selected countries in ASEAN in 2024-2026

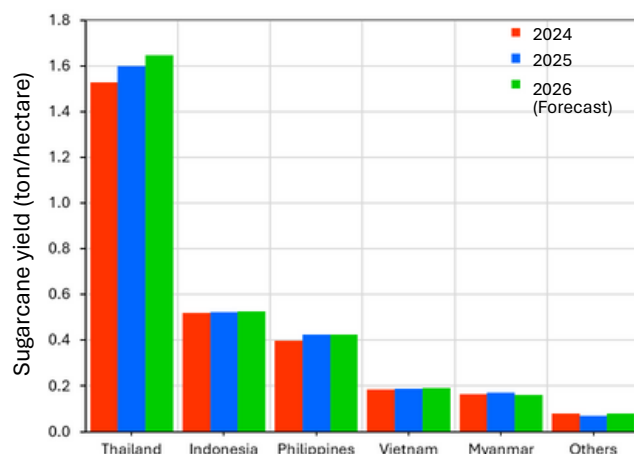


Figure 34. Sugarcane yield of selected countries in ASEAN in 2024-2026

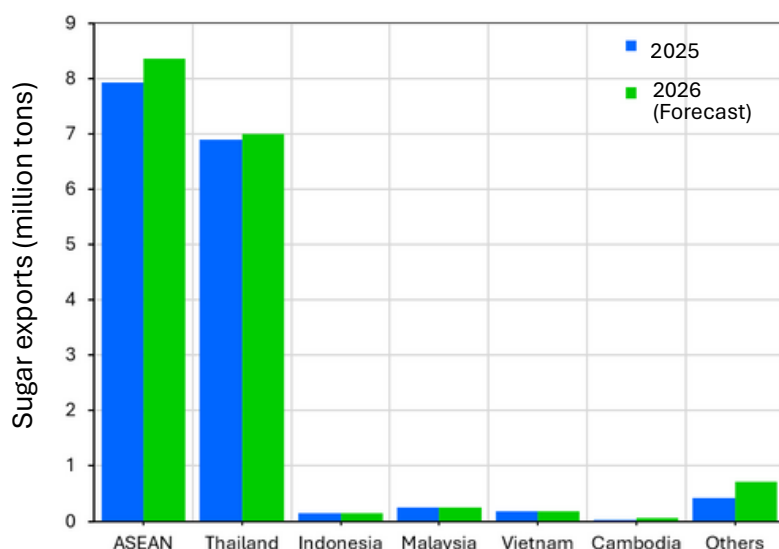


Figure 35. Amount of sugar exports of selected countries in ASEAN in 2025-2026

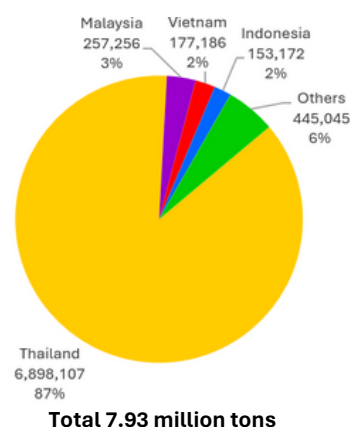


Figure 36. Share of sugar exports (tons) among ASEAN countries in 2025

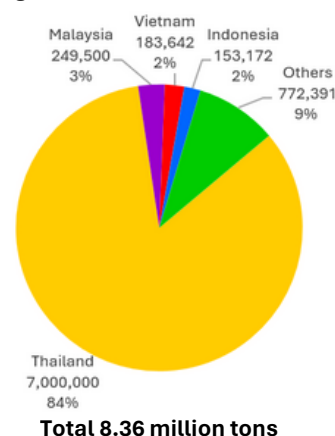


Figure 37. Share of sugar exports (tons) among ASEAN countries in 2026

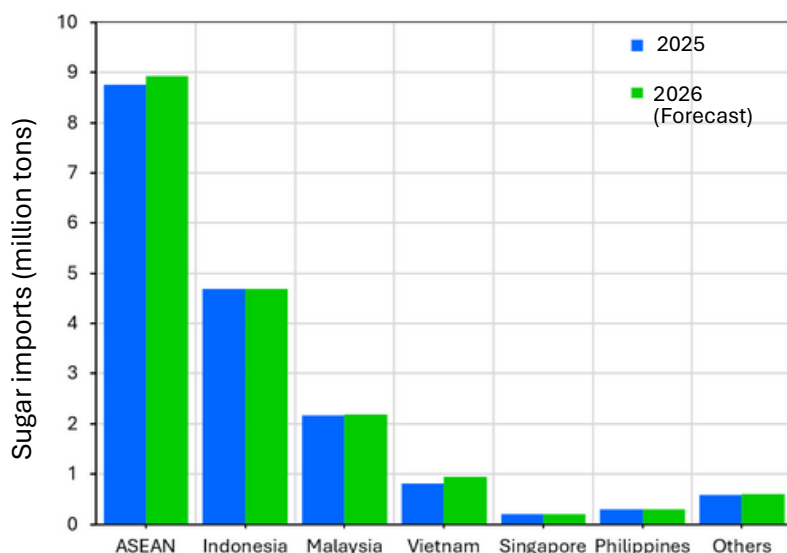


Figure 38. Amount of sugar imports of selected countries in ASEAN in 2025-2026

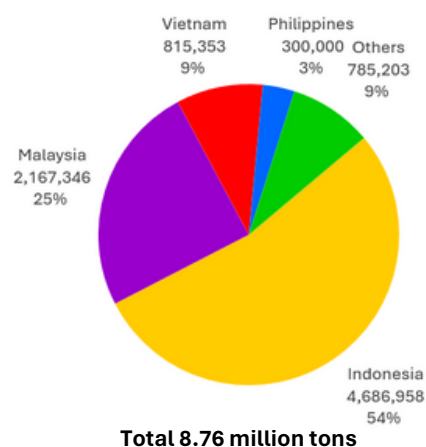


Figure 39. Share of sugar imports (tons) among ASEAN countries in 2025

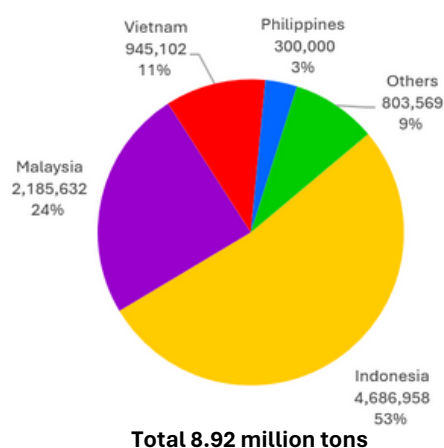


Figure 40. Share of sugar imports (tons) among ASEAN countries in 2026

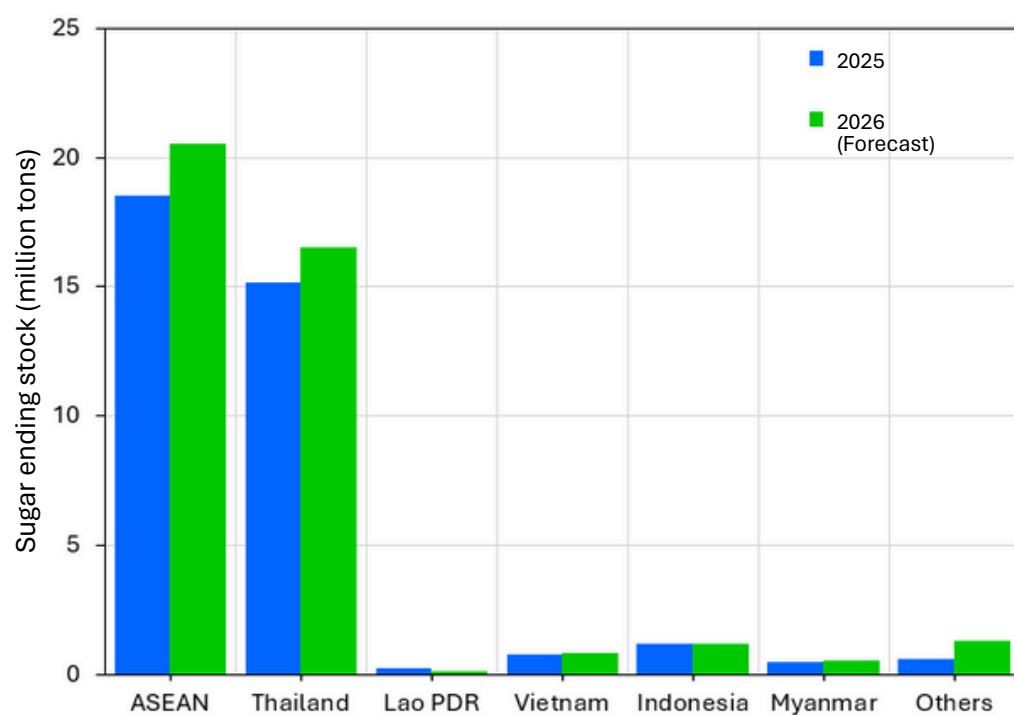


Figure 41. Amount of ending stock of sugar in ASEAN in 2025-2026

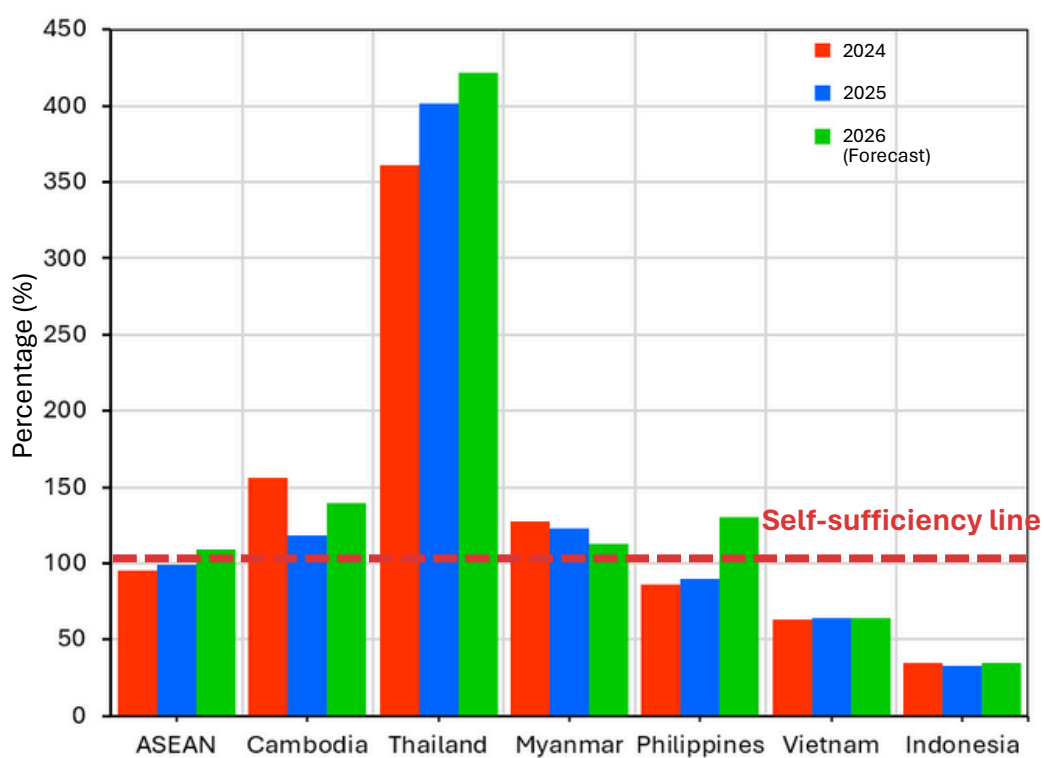


Figure 42. Ratio of sugar production to domestic utilization in ASEAN in 2024-2026

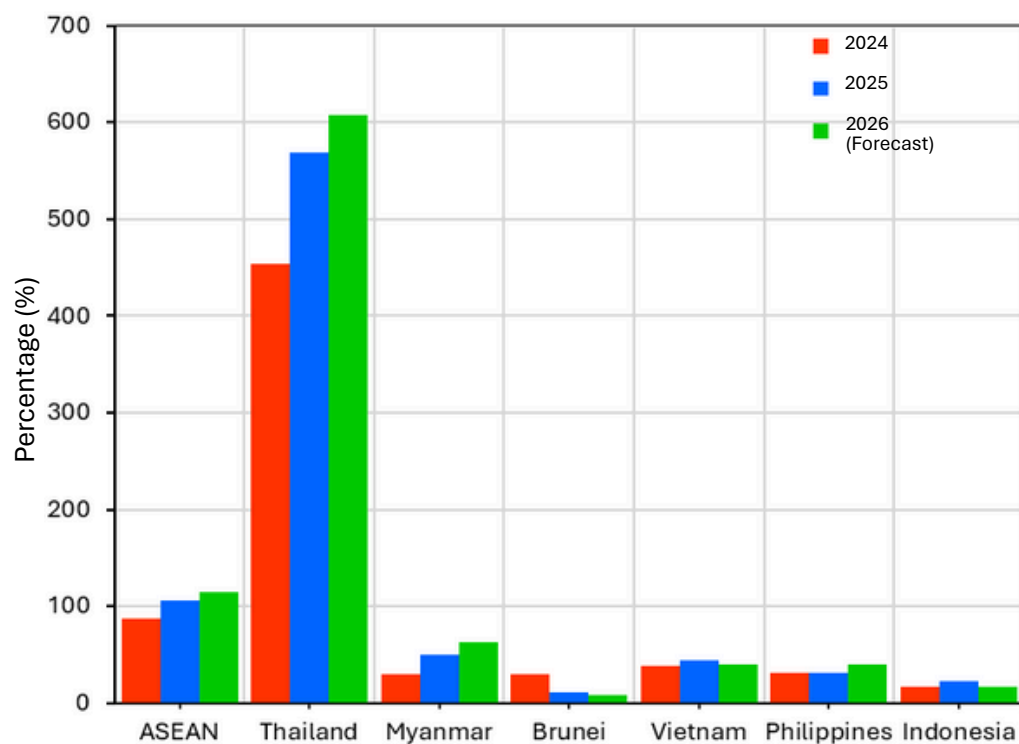


Figure 43. Ratio of sugar beginning stock to domestic utilization in ASEAN in 2024-2026

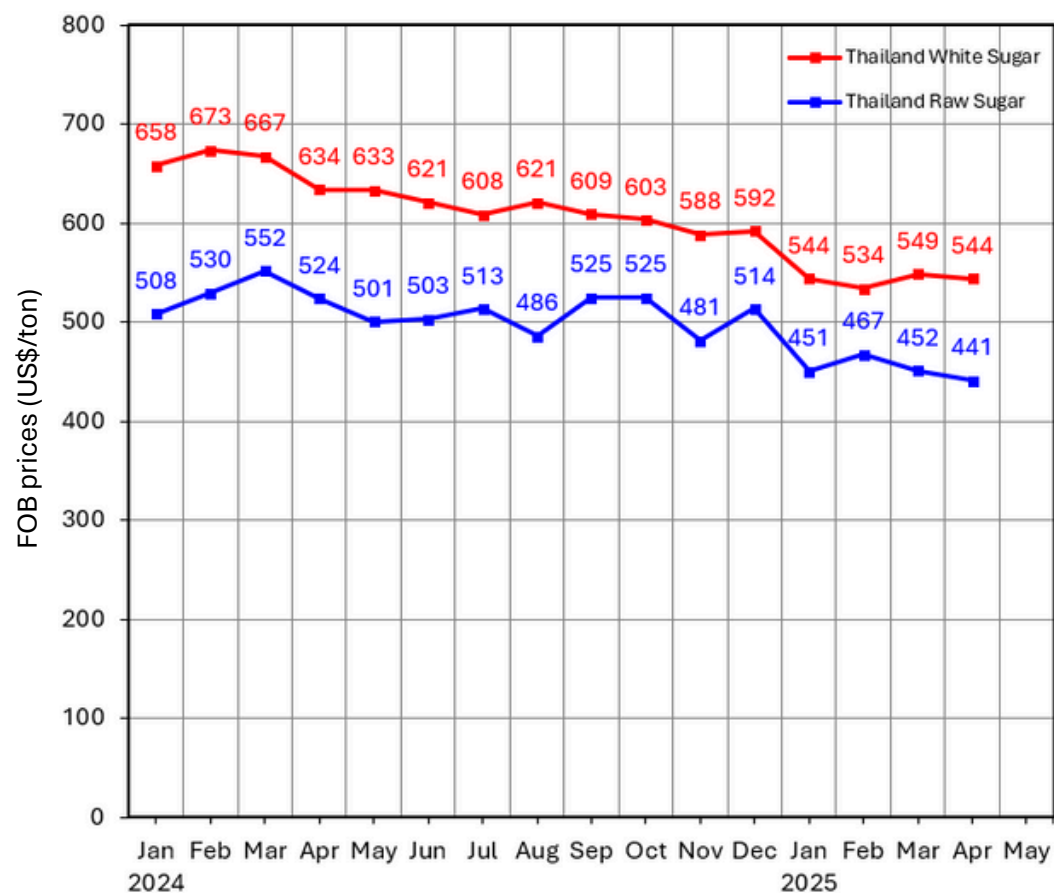


Figure 44. FOB prices (US\$/ton) of sugar of selected countries in ASEAN in 2024-2025

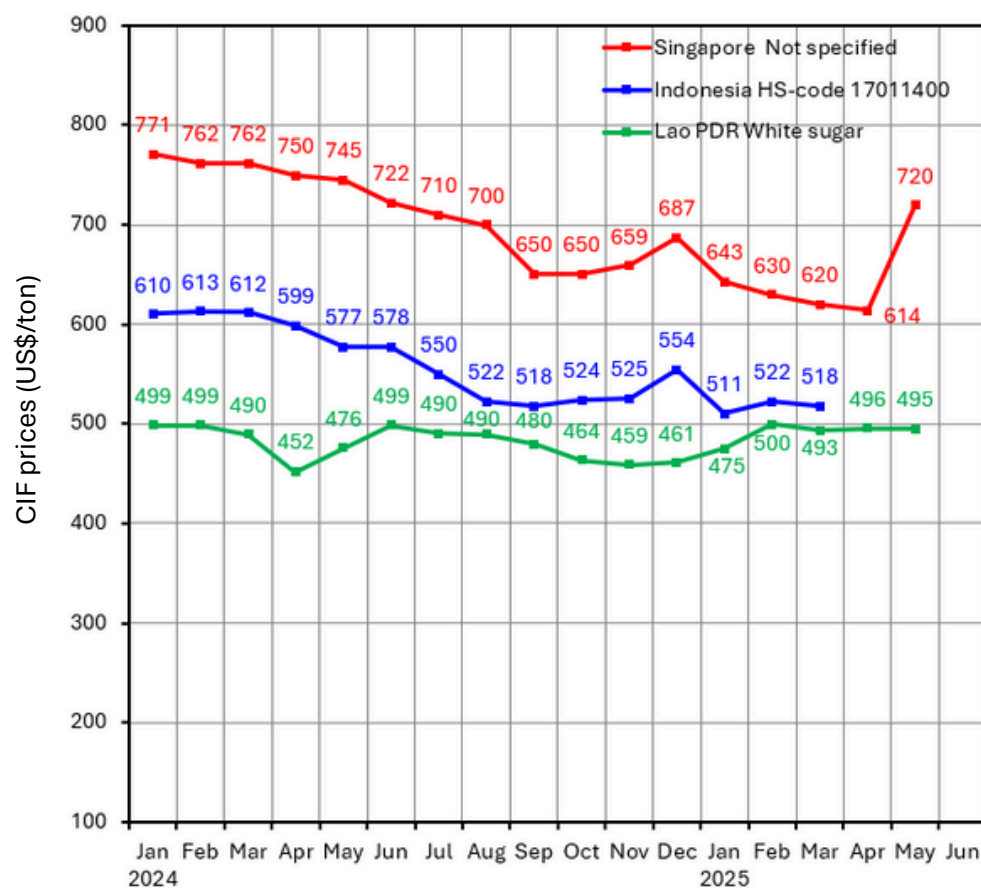


Figure 45. CIF prices (US\$/ton) of sugar of selected countries in ASEAN in 2024-2025

Soybean Outlook for 2026

Highlights

The forecast for the supply of soybeans in ASEAN indicates an increase from 11.60 million tons in 2025 to 11.87 million tons in 2026, reflecting an increase of 0.27 million tons, or 2.33 percent (Table 46). This growth in the soybean supply is driven by increases in both beginning stock and imports. The beginning stock is estimated at 0.63 million tons in 2026, up 0.05 million tons, or 8.62 percent, from 0.58 million tons in 2025. Soybean production for 2025 is forecast at 0.75 million tons, reflecting a remain from the previous year's production. The soybean import is forecast to increase by 0.22 million tons, or 2.14 percent, from 10.28 million tons in 2025 to 10.50 million tons in 2026.

The increase in soybean demand is primarily attributed to the higher ending stock. Meanwhile, the domestic utilization is forecast to decrease by 0.15 million tons, or 1.38 percent, from 10.84 million tons in 2025 to 10.69 million tons in 2026. Exports are forecast to remain 0.14 million tons from the previous year's export. The ending stock is forecast to significantly increase by 0.41 million tons, or 65.08 percent, from 0.63 million tons in 2025 to 1.04 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) in 2026 is forecast to be 6.98 percent, an increase from 6.88 percent in 2025. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 5.86 percent in 2026, an increase from 5.34 percent in the previous year.

Table 46. Summary of the ASEAN soybean situation in 2025-2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	11.60	11.87	0.27	2.33
• Beginning stock	0.58	0.63	0.05	8.62
• Production	0.75	0.75	0.00	0.00
• Import	10.28	10.50	0.22	2.14
Demand (Million tons)	11.60	11.87	0.27	2.33
• Domestic utilization	10.84	10.69	-0.15	-1.38
• Export	0.14	0.14	0.00	0.00
• Ending stock	0.63	1.04	0.41	65.08
Ratio of production to domestic utilization (%)	6.88	6.98	0.10	-
Ratio of beginning stock to domestic utilization (%)	5.34	5.86	0.52	-

ASEAN Soybean Situation in 2025

Production

The soybean production in ASEAN in 2025 (crop year 2024/25) is 0.75 million tons, an increase of 0.01 million tons from 0.74 million tons in 2024 (crop year 2023/24). The increase in production is observed in Cambodia, Lao PDR, Myanmar, and Vietnam. Additionally, Indonesia is the largest soybean-producing country, which will produce approximately 0.35 million tons in 2025, despite a decline in soybean production in Indonesia, the Philippines, and Thailand (Tables 47-50, Figures 46-49).

For Cambodia in 2025, the increase in production is attributed to the expansion in planted area and yield. The increase in planted area is due to the rising soybean prices, the declining prices of competing crops, and government policies. Additionally, the increase in yield is driven by farmers' practices of applying more fertilizer and improving crop management.

For Indonesia in 2025, the decrease in production is attributed to the reduction in planted area. The decrease in planted area is due to the declining soybean prices, rising prices of competing crops and horticulture commodities, and government policies on rice self-sufficiency acceleration. Meanwhile, the increase in yield is due to favorable weather conditions, farmers' practices of taking better care of their crops and using more improved soybean varieties.

For Lao PDR in 2025, the increase in the production is attributed to the increase in planted area. The increase in planted area is due to rising soybean prices and government policies. Meanwhile, the decrease in yield was affected by farmers using less fertilizer, which was mostly affected in the dry season.

For Myanmar in 2025, the increase in production is attributed to the increase in planted area and yield. The increase in planted area was due to the declining prices of competing crops. Additionally, the increase in yield is driven by farmers' practices of taking better care of their crops and using more improved soybean varieties, despite some areas being affected by floods.

For the Philippines in 2025, the decrease in production is attributed to the decrease in yield due to pests' infestation and farmers applying less fertilizer. Meanwhile, the increase in the planted area is driven by sufficient rainfall.

For Thailand in 2025, the decrease in production is attributed to the decrease in planted area. The decrease in planted area is due to a lack of the amount of soybean seed and high costs of production. Meanwhile, the yield is increased due to favorable weather conditions and sufficient water supply.

For Vietnam in 2025, the increase in production is attributed to the increase in harvested area and yield. The expansion in harvested area is due to favorable weather conditions. The yield is increased due to favorable weather conditions and farmers improving crop management.

Utilization and Stock

The domestic utilization of soybeans in ASEAN increases to 10.84 million tons in 2025, up from 10.02 million tons in 2024 (Tables 52-53). The beginning stock of soybeans in ASEAN for 2025 is estimated at 0.58 million tons, up from 0.20 million tons in 2024. The ending stock of soybeans in ASEAN for 2025 is estimated at 0.63 million tons, up from 0.58 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) in ASEAN for 2025 is 6.88 percent, reflecting a decrease from approximately 7.34 percent in 2024 (Table 55, Figure 57).

Additionally, the food security ratio, representing the ratio of beginning stock to domestic utilization in ASEAN for 2025, is estimated at 5.34 percent, showing an increase from 1.99 percent in 2024 (Table 56, Figure 58).

In global trade, soybean production in year 2025 is projected to rise, led by notable increases in Argentina and South Africa. These gains support higher global oilseed output and contribute to larger soybean ending stocks, particularly in Brazil. Despite this, China and Mexico show stock declines, reflecting steady or rising consumption³.

In contrast, ASEAN soybean production remains modest, increasing only slightly from 0.74 to 0.75 million tons. This growth is largely due to increased output in Cambodia, Lao PDR, Myanmar, and Vietnam, with Cambodia posting a substantial 34.57 percent production increase. However, Indonesia, the region's top producer, experienced a production decline.

Despite the production uptick, ASEAN's domestic soybean utilization reached 10.84 million tons, far outpacing regional output. This results in a declining self-sufficiency ratio of just 6.88 percent, down from 7.34 percent in 2024, highlighting a growing dependency on imports. Indeed, soybean imports rose to 10.28 million tons, while exports also grew modestly.

Notably, ASEAN's food security ratio improved to 5.34 percent, contributing to a significant increase in beginning stocks, indicating some improvement in stockpiling despite limited production growth.

Trade

In 2024, ASEAN exports a total of 137,602 tons of soybeans, an increase of 29,540 tons from 108,063 tons in 2024. Additionally, ASEAN countries import 10.28 million tons of soybeans in 2025, an increase of 0.51 million tons from 9.77 million tons in 2024 (Tables 52-53, Figures 50-51). The quantity and value of soybean exports by destination countries, as well as the quantity and value of soybean imports by origin countries, are provided in Tables 57-58.

Prices

The monthly FOB prices of soybeans for exporting countries during 2024-2025 are presented in Table 59, and also the monthly CIF prices for importing countries are presented in Table 60 (Figures 59-60).

Damaged Area

The total damaged area of soybeans in ASEAN in 2024 is estimated at 861 hectares. The most causes of damage are floods, which affected 571 hectares in Myanmar, along with the unspecified damage of 290 hectares (Table 51).

Reference:

3. Oilseeds: World Markets and Trade [Internet]. United States Department of Agriculture Foreign Agricultural Service (USDA). 2025 [cited 2025 July 28]. Available from: <https://www.fao.org/worldfoodsituation/csdb>.

Prospects for Soybean in 2026

Production

The forecast for soybean production in ASEAN in 2026 indicates an increase of 920 tons, or 0.12 percent, from 745,590 tons in 2025 to 746,510 tons in 2025 (Table 47, Figure 46). Overall, production is expected to decline in Cambodia, Indonesia, and Thailand. However, only production in Lao PDR, Myanmar, the Philippines, and Vietnam is expected to increase.

For Indonesia in 2026, the production is expected to decrease due to the reduction in planted area. The planted area is expected to decrease due to the rising prices of competing crops. Meanwhile, the yield is expected to increase due to favorable weather conditions, farmers' practices of taking better care of their crops, using improved soybean varieties, and applying more fertilizer.

For Lao PDR in 2026, the production is expected to increase due to the expansion in planted area and yield. The planted area is expected to increase due to the rising soybean prices and government policies. Moreover, the yield is expected to increase as farmers may improve crop management.

For Vietnam in 2026, the production is expected to increase due to the expansion in planted area and yield. The planted area is expected to increase due to favorable weather conditions. Moreover, the yield is expected to increase with improvement nearly previous year.

Utilization and Stock

The domestic utilization of soybeans in ASEAN is forecast to decrease by 0.15 million tons, or 1.39 percent, from 10.84 million tons in 2025 to 10.69 million tons in 2026 (Tables 52-53).

The beginning stock in ASEAN in 2026 is forecast to slightly increase by 0.05 million tons, or 8.14 percent, from 0.58 million tons in 2025 to 0.63 million tons in 2026 (Tables 53-54). The ending stock in ASEAN in 2026 is forecast to greatly increase by 0.41 million tons, or 65.47 percent, from 0.63 million tons in 2025 to 1.04 million tons in 2026 (Tables 53-54, Figure 56).

The ratio of production to domestic utilization (self-sufficiency ratio) is estimated to be 6.98 percent, an increase from 6.88 percent in 2025 (Table 55, Figure 57).

The ratio of beginning stock to domestic utilization (food security ratio) is estimated to be 5.86 percent in 2026, an increase from 5.34 percent in 2025 (Table 56, Figure 58).

Trade

The export of soybeans is forecast to increase by 6,510 tons, or 4.73 percent, from 137,602 tons in 2025 to 144,122 tons in 2026. The import of soybeans is forecast to increase by 0.22 million tons, or 2.12 percent, from 10.28 million tons in 2025 to 10.50 million tons in 2026 (Tables 53 and 54, Figures 50, 52, 53, and 55).

Table 47. Soybean production in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	735.58	745.59	10.01	1.36	746.51	0.92	0.12
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	18.08	24.33	6.25	34.57	21.07	-3.25	-13.36
Indonesia	363.31	347.45	-15.86	-4.36	332.28	-15.17	-4.36
Lao PDR	80.30	87.70	7.40	9.22	93.00	5.30	6.04
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	210.27	222.82	12.55	5.97	236.11*	13.29	5.97
Philippines	0.60	0.50*	-0.10	-16.92	0.60*	0.10	20.24
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	16.90	16.35	-0.55	-3.27	15.88	-0.47	-2.89
Vietnam	46.12	46.45	0.33	0.72	47.56	1.11	2.39

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 48. Soybean planted area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	396.21	424.47	28.26	7.13	421.50	-2.97	-0.70
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	11.44	14.91	3.47	30.35	13.17	-1.74	-11.64
Indonesia	196.73	182.71	12.90	7.60	169.81	-12.90	-7.06
Lao PDR	36.23	39.58	3.35	9.24	41.40	1.82	4.60
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	139.33	148.43	9.10	6.53	158.12*	9.70	6.53
Philippines	0.34*	0.36*	0.02	5.11	0.37*	0.01	3.06
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	10.58	10.04	-0.54	-5.14	9.62	-0.41	-4.10
Vietnam	28.48	28.45	-0.03	-0.11	29.00	0.55	1.93

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 49. Soybean harvested area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	422.79	423.24	0.45	0.11	419.58	-3.66	-0.86
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	11.44	14.62	3.18	27.82	13.17	-1.45	-9.89
Indonesia	196.60	182.71	-13.88	-7.06	169.81	-12.90	-7.06
Lao PDR	36.23	39.58	3.35	9.24	41.40	1.82	4.60
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	139.29	147.52	8.23	5.91	156.25*	8.73	5.91
Philippines	0.34	0.36*	0.02	5.11	0.37*	0.01	3.06
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	10.55	10.00	-0.55	-5.23	9.58	-0.41	-4.15
Vietnam	28.34	28.45	0.11	0.39	29.00	0.55	1.93

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 50. Soybean yield in ASEAN countries in 2024 – 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	1.74	1.76	0.02	1.25	1.78	0.02	1.00
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	1.58	1.66	0.08	5.28	1.60	-0.06	-3.85
Indonesia	1.85	1.90	0.05	2.90	1.96	0.06	2.90
Lao PDR	2.22	2.22	0.00	-0.02	2.25	0.03	1.38
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	1.51	1.51	0.00	0.06	1.51*	0.00	0.05
Philippines	1.76	1.39*	-0.37	-20.96	1.62*	0.23	16.67
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1.60	1.64	0.03	2.07	1.66	0.02	1.31
Vietnam	1.63	1.63	0.01	0.33	1.64	0.01	0.45

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 51. Soybean damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectares

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	571	-	-	-	-	290	861
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	290	290
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	571	-	-	-	-	-	571
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

Remark: - refers to data that is **Not Applicable**.

Table 52. Soybean balance sheet of ASEAN countries in 2024

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	199,438	735,575	9,769,918	10,704,932	10,017,810	108,063	579,060	10,704,932
Brunei	-	-	755	755	755	-	-	755
Cambodia	-	18,076	53,632*	71,708	16,858	54,850	-	71,708
Indonesia	49,706	363,306	2,676,317	3,089,329	2,773,026	2,638	313,665	3,089,329
Lao PDR	5,353	80,300	13,814	99,468	5,545	33,693	60,230	99,468
Malaysia	64,000	-	725,000*	789,000	710,000*	10,000*	69,000	789,000
Myanmar	6,740	210,274	835	217,849	198,536	220	19,093	217,849
Philippines	6,614	601	190,000	197,215	182,000	-	15,215	197,215
Singapore	-	-	20,295	20,295	19,588	708	-	20,295
Thailand	-	16,899	3,871,096	3,887,995	3,887,749	246	-	3,887,995
Vietnam	67,025	46,120	2,218,174	2,331,319	2,223,754	5,708	101,857	2,331,319

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 53. Soybean balance sheet of ASEAN countries in 2025

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	579,060	745,588	10,277,881	11,602,530	10,838,724	137,602	626,203	11,602,530
Brunei	-	-	792	792	792	-	-	792
Cambodia	-	24,325	39,788*	64,113	15,322	48,791	-	64,113
Indonesia	313,665	347,448	2,392,283	3,053,396	2,888,821	5,643	158,932	3,053,396
Lao PDR	60,230	87,700	15,738	163,668	5,313	67,844	90,510	163,668
Malaysia	69,000	-	800,000*	869,000	790,000*	10,000*	69,000	869,000
Myanmar	19,093	222,820	880*	242,793	197,365*	300*	45,128	242,793
Philippines	15,215	499	195,135	210,849	174,337	-	36,512	210,849
Singapore	-	-	21,446	21,446	21,423	23	-	21,446
Thailand	-	16,347	4,000,000	4,016,347	4,016,107	240	-	4,016,347
Vietnam	101,857	46,450	2,811,819	2,960,126	2,729,244	4,761	226,121	2,960,126

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 54. Soybean balance sheet of ASEAN countries in 2026

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	626,203	746,505	10,495,654	11,868,363	10,688,058	144,112	1,036,193	11,868,363
Brunei	-	-	832	832	832	-	-	832
Cambodia	-	21,075	46,836*	67,911	16,090	51,821	-	67,911
Indonesia	158,932	332,282	2,447,676	2,938,890	2,557,697	3,614	377,579	2,938,890
Lao PDR	90,510	93,000	12,586	196,096	5,857	71,575	118,663	196,096
Malaysia	69,000	-	800,000*	869,000	790,000*	10,000*	69,000	869,000
Myanmar	45,128	236,114*	900*	282,142	196,200*	300*	85,642	282,142
Philippines	36,512	600*	195,000*	232,112	170,000*	-	62,112	232,112
Singapore	-	-	21,394	21,394	20,831	562	-	21,394
Thailand	-	15,875	4,000,000*	4,015,875	4,015,635*	240*	-	4,015,875
Vietnam	226,121	47,560	2,970,430	3,244,111	2,914,915	6,000	323,196	3,244,111

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 55. Ratio of soybean production to domestic utilization in ASEAN countries (self-sufficiency ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	735,575	10,017,810	7.34	745,588	10,838,724	6.88	746,505	10,688,058	6.98
Brunei	-	755	-	-	792	-	-	832	-
Cambodia	18,076	16,858	107.23	24,325	15,322	158.76	21,075	16,090	130.98
Indonesia	363,306	2,773,026	13.10	347,448	2,888,821	12.03	332,282	2,557,697	12.99
Lao PDR	80,300	5,545	1,448.15	87,700	5,313	1,650.54	93,000	5,857	1,587.71
Malaysia	-	710,000	-	-	790,000	-	-	790,000	-
Myanmar	210,274	198,536	105.91	222,820	197,365	112.90	236,114	196,200	120.34
Philippines	601	182,000	0.33	499	174,337	0.29	600	170,000	0.35
Singapore	-	19,588	-	-	21,423	-	-	20,831	-
Thailand	16,899	3,887,749	0.43	16,347	4,016,107	0.41	15,875	4,015,635	0.40
Vietnam	46,120	2,223,754	2.07	46,450	2,729,244	1.70	47,560	2,914,915	1.63

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 56. Ratio of soybean beginning stock to domestic utilization in ASEAN countries (food security ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	199,438	10,017,810	1.99	579,060	10,838,724	5.34	626,203	10,688,058	5.86
Brunei	-	755	-	-	792	-	-	832	-
Cambodia	-	16,858	-	-	15,322	-	-	16,090	-
Indonesia	49,706	2,773,026	1.79	313,665	2,888,821	10.86	158,932	2,557,697	6.21
Lao PDR	5,353	5,545	96.54	60,230	5,313	1,133.54	90,510	5,857	1,545.21
Malaysia	64,000	710,000	9.01	69,000	790,000	8.73	69,000	790,000	8.73
Myanmar	6,740	198,536	3.39	19,093	197,365	9.67	45,128	196,200	23.00
Philippines	6,614	182,000	3.63	15,215	174,337	8.73	36,512	170,000	21.48
Singapore	-	19,588	-	-	21,423	-	-	20,831	-
Thailand	-	3,887,749	-	-	4,016,107	-	-	4,015,635	-
Vietnam	67,025	2,223,754	3.01	101,857	2,729,244	3.73	226,121	2,914,915	7.76

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 57. Quantity and value of soybean exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	Vietnam	21,673	12,136,656	21,673	12,136,656	-	-	21,673	12,136,656
Indonesia	Brunei	0.30	634	0.30	634.40	943	323,442	944	324,076
Lao PDR	-	-	-	-	-	67,844	25,805,540	67,844	25,805,540
Malaysia	Brunei	-	13,731	-	1,381,245	-	14,834	-	1,396,079
	Indonesia	-	1,266,134						
	Singapore	-	101,378						
	Thailand	-	2.48						
Myanmar	-	-	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Cambodia	21	28,039	52	63,431	7	12,905	58	76,336
	Lao PDR	6	1,652						
	Myanmar	18	14,728						
	Singapore	7	19,012						
Vietnam	Cambodia	-	750,799	-	772,938.33	-	23,773	-	796,711
	Lao PDR	-	22,139						

Remark: - is noted that the value is **Not Applicable**.

Table 58. Quantity and value of soybean imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	2,150	1,197,075	2,150	1,197,080	855,969	396,934,841	858,119	398,131,921
	Thailand	0.0010	5.00						
Lao PDR	Thailand	5,119	2,070,698	7,725	3,162,028	8,013	3,706,621	15,738	6,868,649
	Vietnam	2,606	1,091,330						
Malaysia	-	-	-	-	85,952,685	-	85,952,685	-	85,952,685
Myanmar	-	-	-	-	-	245	345,000	245	345,000
Philippines	-	-	-	-	-	-	-	-	-
Singapore	Indonesia	4.05	13,594	1,766	1,910,547	19,679	15,808,917	21,446	17,719,464
	Malaysia	1,762	1,895,369						
	Myanmar	0.20	439						
Thailand	Cambodia	938	414,745	938	414,745	1,772,154	800,284,794	1,773,092	800,699,539
Vietnam	Cambodia	2,232	1,631,750	2,232	1,631,750	2,232	1,631,750	2,232	1,631,750

Remark: - is noted that the value is **Not Applicable**.

Table 59. FOB prices of soybean in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia	Not specified	2024	579	550	566	527	550	580	550	566	673	598	585	580	575
		2025	554	549	560	570	580	549	-	-	-	-	-	-	560
Indonesia	HS-code 12019000	2024	428	460	578	342	597	412	511	288	444	296	437	364	430
		2025	256	431	434	283	-	-	-	-	-	-	-	-	351
Lao PDR	Grade A	2024	343	346	425	380	345	380	357	375	366	372	378	380	371
		2025	380	380	380	381	-	-	-	-	-	-	-	-	380
Myanmar	Not specified	2024	879	877	-	-	-	-	-	-	-	-	-	-	878
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
Vietnam	Not specified	2024	575	558	516	500	508	513	508	502	485	493	496	462	510
		2025	462	458	443	444	494	-	-	-	-	-	-	-	460

Remark: - is noted that the value is **Not Applicable**.

Table 60. CIF prices of soybean in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS-code 12019000	2024	572	571	553	528	521	514	522	519	510	499	482	467	522
		2025	464	464	451	470	-	-	-	-	-	-	-	-	462
Lao PDR	Grade A	2024	468	446	563	413	508	523	525	465	481	400	389	490	472
		2025	426	430	448	442	-	-	-	-	-	-	-	-	437
Myanmar	Not specified	2024	1,030	0	0	0	1,146	0	1,149	1,149	900	0	0	0	1,075
		2025	0	245	-	-	-	-	-	-	-	-	-	-	245
Singapore	Not specified	2024	950	1,011	919	923	932	934	944	907	912	882	889	891	925
		2025	848	825	806	822	838	808	768	786	790	731	861	859	812

Remark: - is noted that the value is **Not Applicable**.

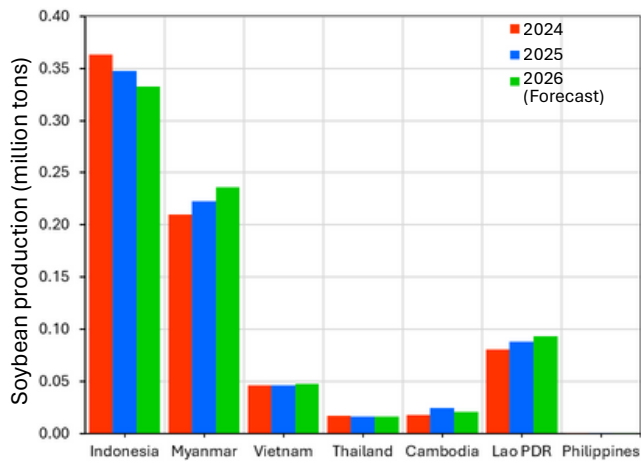


Figure 46. Soybean production of selected countries in ASEAN in 2024-2026

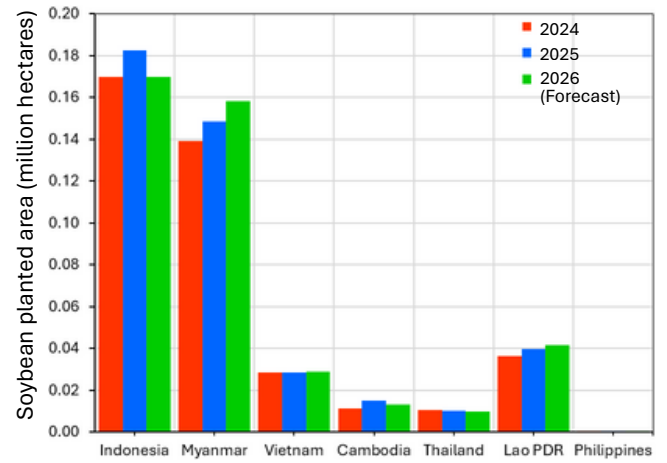


Figure 47. Soybean planted area of selected countries in ASEAN in 2024-2026

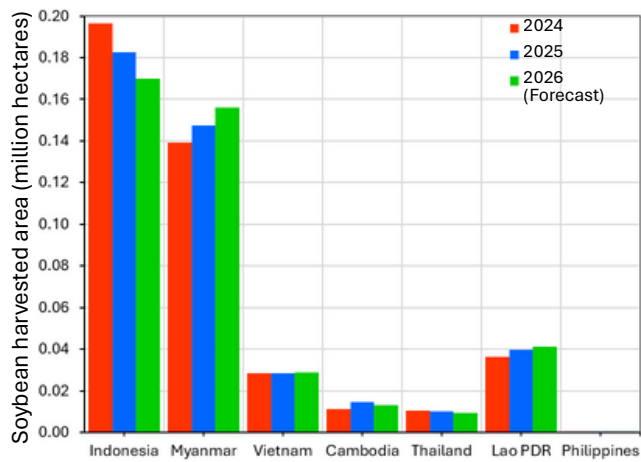


Figure 48. Soybean harvested area of selected countries in ASEAN in 2024-2026

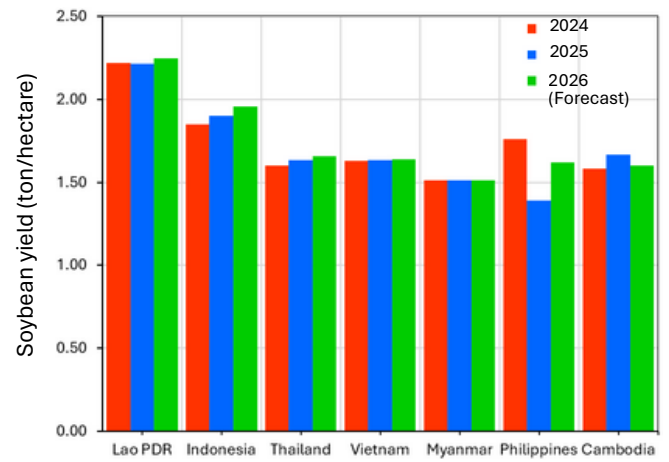


Figure 49. Soybean yield of selected countries in ASEAN in 2024-2026

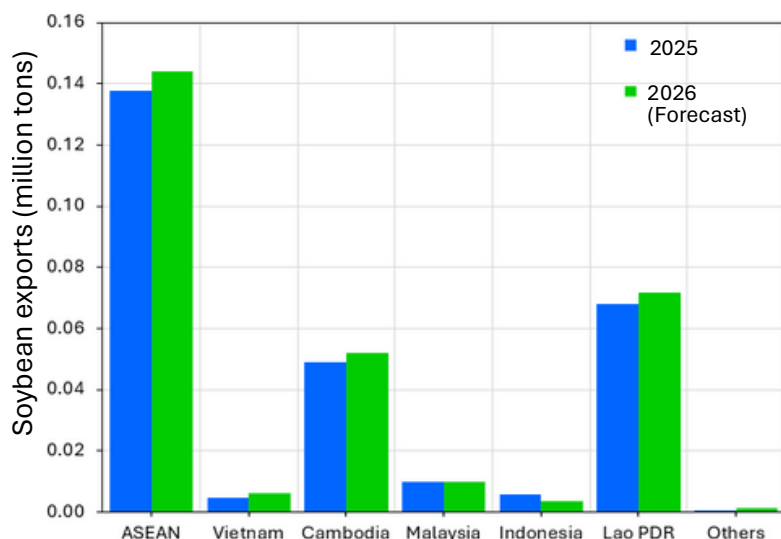
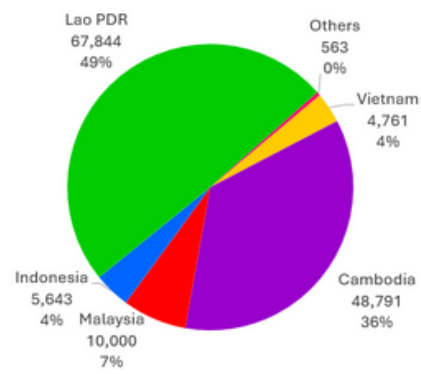
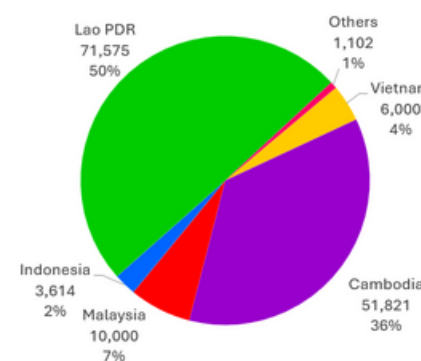


Figure 50. Amount of soybean exports of selected countries in ASEAN in 2025-2026



Total 0.138 million tons

Figure 51. Share of soybean exports (tons) among ASEAN countries in 2025



Total 0.144 million tons

Figure 52. Share of soybean exports (tons) among ASEAN countries in 2026

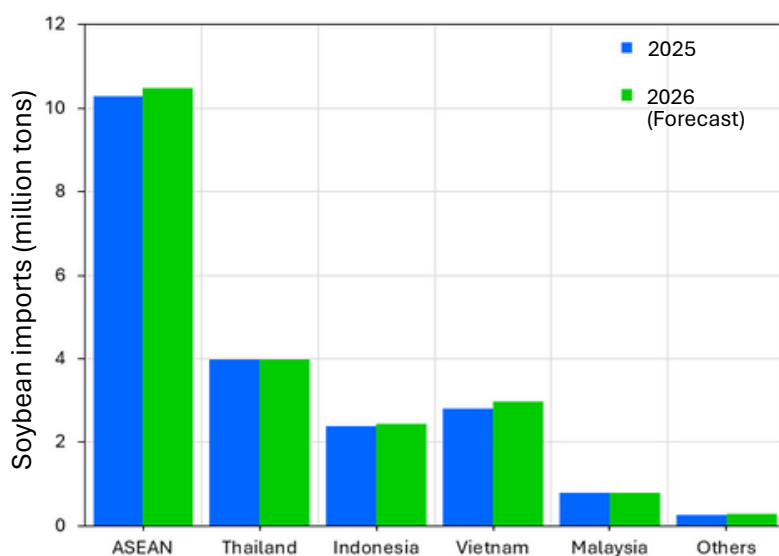
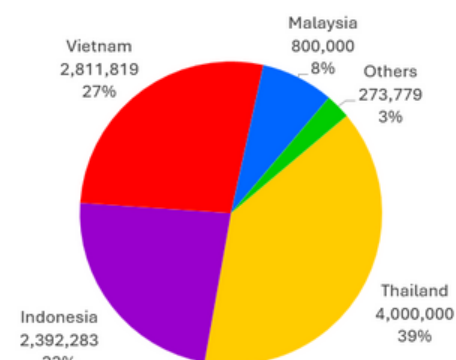
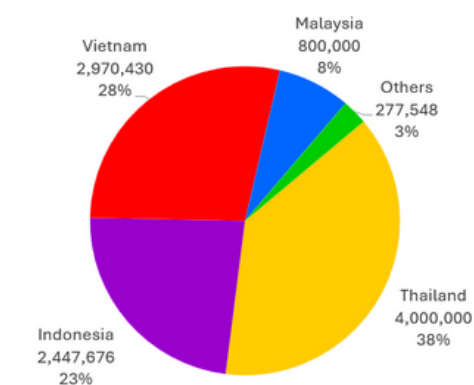


Figure 53. Amount of soybean imports of selected countries in ASEAN in 2025-2026



Total 10.28 million tons

Figure 54. Share of soybean imports (tons) among ASEAN countries in 2025



Total 10.50 million tons

Figure 55. Share of soybean imports (tons) among ASEAN countries in 2026

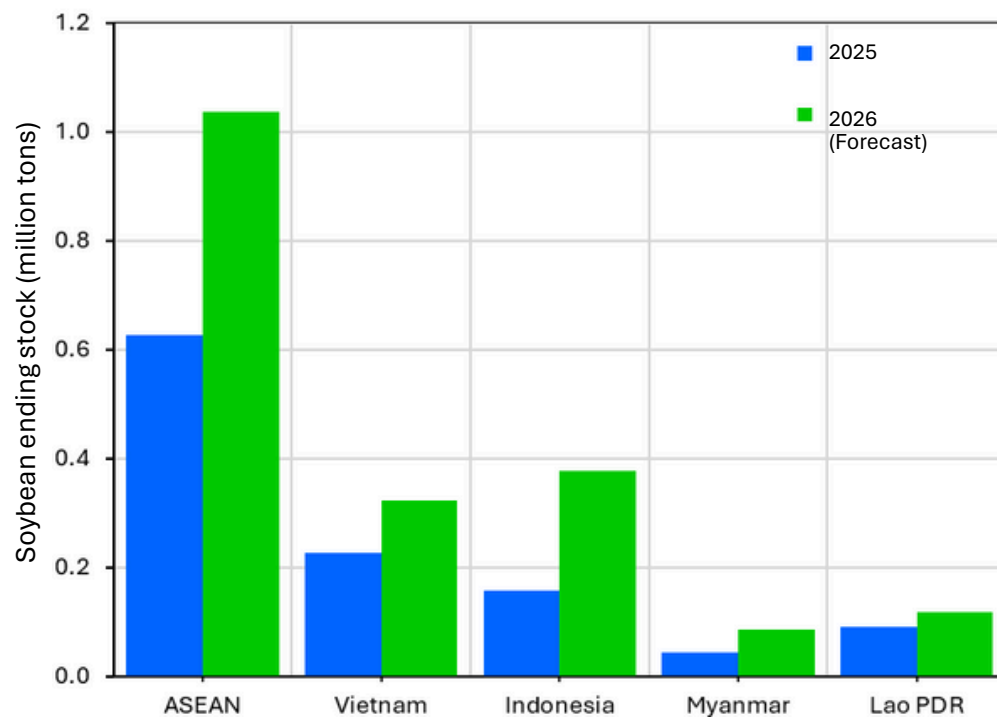


Figure 56. Amount of ending stock of soybean in ASEAN in 2025-2026

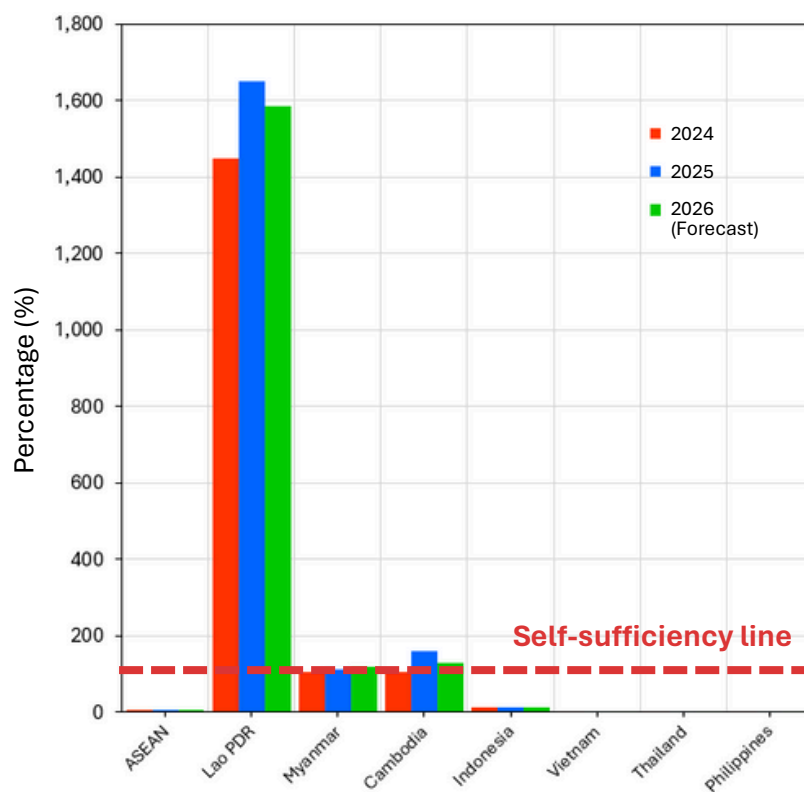


Figure 57. Ratio of soybean production to domestic utilization in ASEAN in 2024-2026

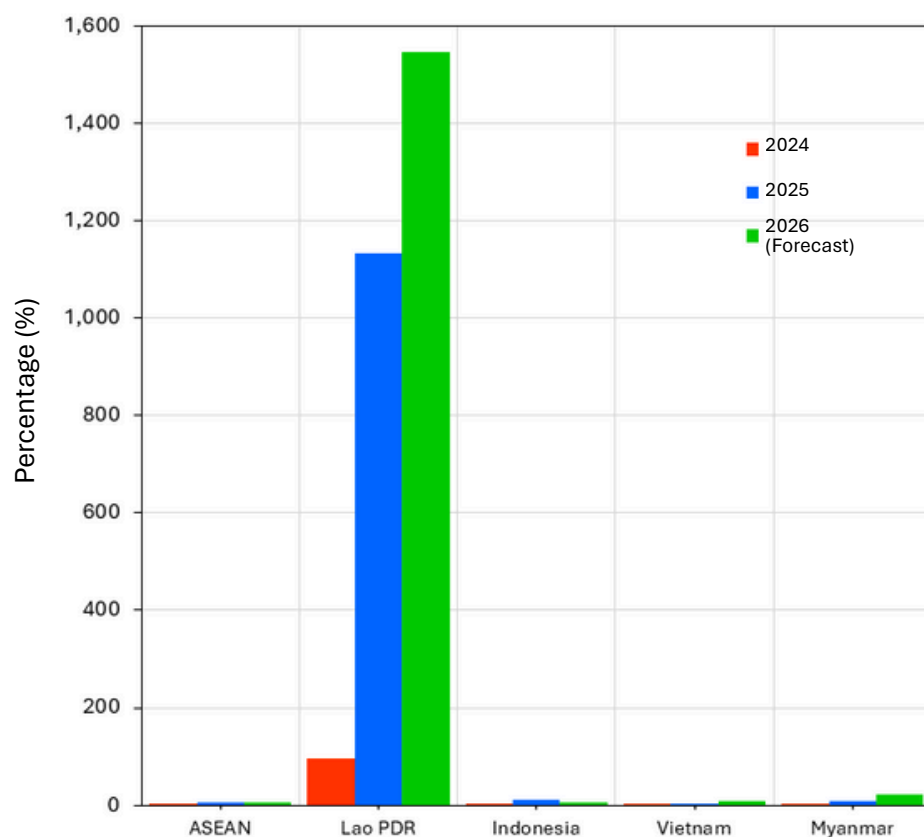


Figure 58. Ratio of soybean beginning stock to domestic utilization in ASEAN in 2024-2026

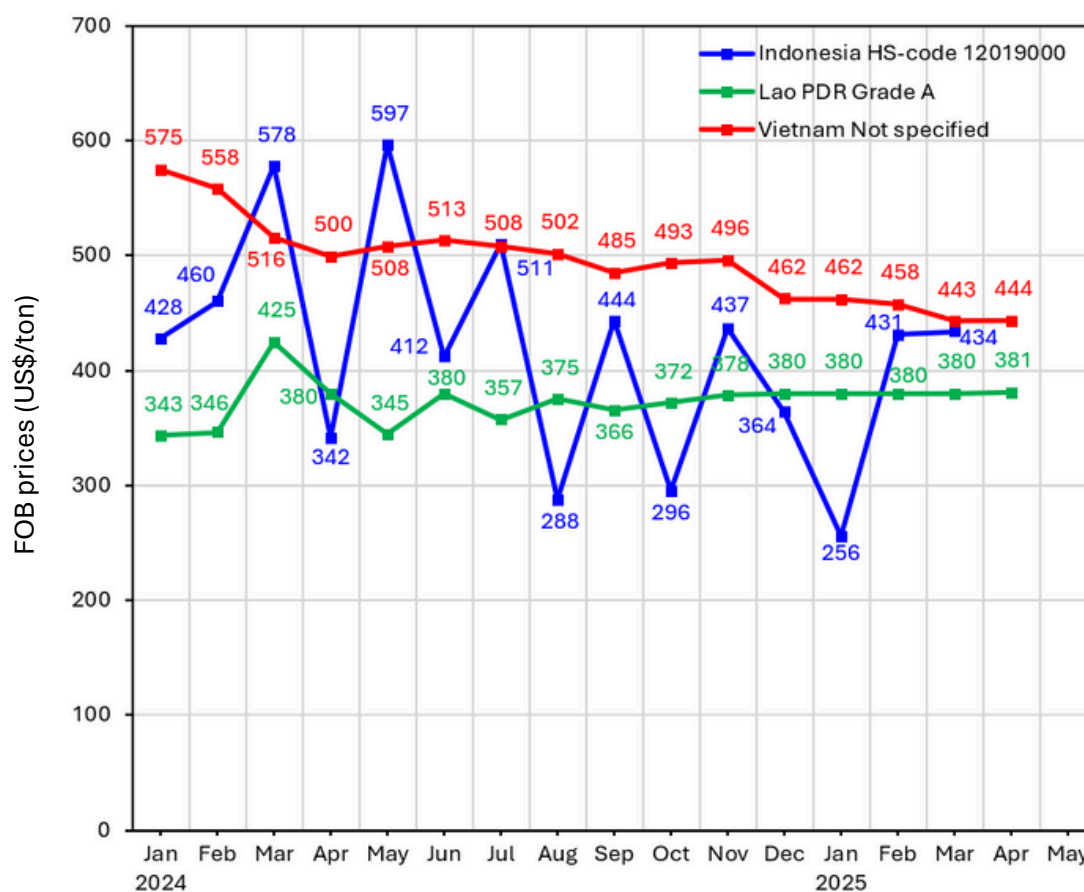


Figure 59. FOB prices (US\$/ton) of soybean of selected countries in ASEAN in 2024-2025

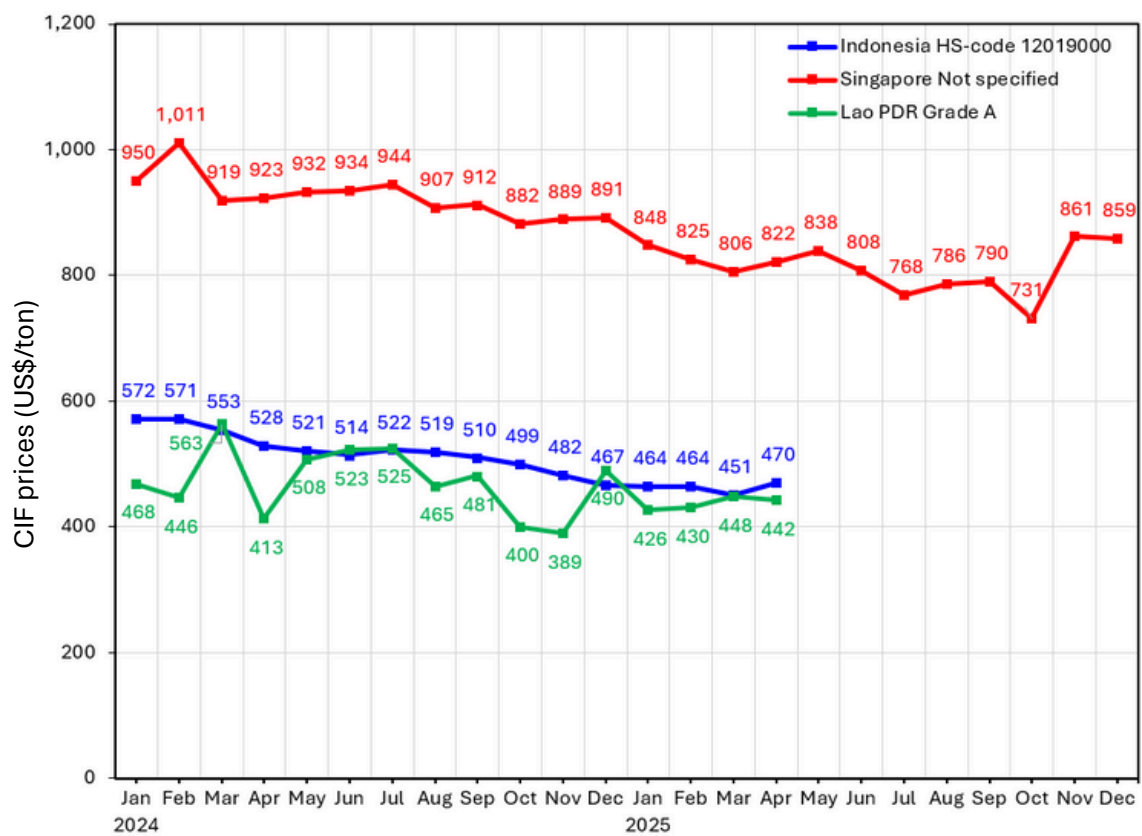


Figure 60. CIF prices (US\$/ton) of soybean of selected countries in ASEAN in 2024-2025

Cassava Outlook for 2026

Highlights

The forecast for the supply of cassava in ASEAN indicates an increase from 102.97 million tons in 2025 to 104.57 million tons in 2026, an increase of 1.60 million tons, or 1.55 percent (Table 61). This growth in supply is driven by increases in the beginning stock. The beginning stock is estimated at 20.03 million tons in 2026, an increase of 3.94 million tons, or 24.49 percent, from 16.09 million tons in 2025. Cassava production for 2026 is estimated at 74.35 million tons, a decrease from 76.30 million tons in 2025. The import of cassava is forecast to decrease by 0.40 million tons, or 3.78 percent, from 10.58 million tons in 2025 to 10.18 million tons in 2026.

The increase in demand for cassava is primarily attributed to the ending stock. Meanwhile, the domestic utilization is forecast to decrease by 1.27 million tons, or 2.67 percent, from 47.62 million tons in 2025 to 46.35 million tons in 2026. The export is expected to decrease by 2.48 million tons, or 7.02 percent, from 35.32 million tons in 2025 to 32.84 million tons in 2026. The ending stock is expected to increase by 5.35 million tons, or 26.71 percent, from 20.03 million tons in 2025 to 25.38 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) in 2026 is estimated to be 160.40 percent, which increase from 160.23 percent in 2025. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 43.22 percent in 2026, an increase from 33.79 percent in 2025.

Table 61. Summary of the ASEAN cassava situation in 2025-2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	102.97	104.57	1.60	1.55
• Beginning stock	16.09	20.03	3.94	24.49
• Production	76.30	74.35	-1.95	-2.56
• Import	10.58	10.18	-0.40	-3.78
Demand (Million tons)	102.97	104.57	1.60	1.55
• Domestic utilization	47.62	46.35	-1.27	-2.67
• Export	35.32	32.84	-2.48	-7.02
• Ending stock	20.03	25.38	5.35	26.71
Ratio of production to domestic utilization (%)	160.23	160.40	0.17	-
Ratio of beginning stock to domestic utilization (%)	33.79	43.22	9.43	-

ASEAN Cassava Situation in 2025



Production

In 2025 (crop year 2024/25), cassava (fresh root) production in ASEAN is estimated at 76.30 million tons, a decrease of 2.49 million tons, or 3.16 percent, from the 78.79 million tons recorded in 2024. A decrease in production is observed in Cambodia, Indonesia, the Philippines, and Thailand. However, an increase in cassava production is observed in Brunei Darussalam, Lao PDR, Malaysia, Myanmar, and Vietnam (Tables 62-65 and Figures 61-64).

For Brunei in 2025, the increase in production is attributed to the increase in yield. The increase in yield is due to farmers' practice to improve crop management.

For Cambodia in 2025, the decrease in production is attributed to the decrease in planted area. Meanwhile, the yield is slightly increased due to farmers' practices of using more cassava varieties, applying more fertilizer, and improving crop management.

For Indonesia in 2025, the decrease in production is attributed to the reduction in planted area. The decrease in planted area is affected by the declining cassava prices and the rising prices of competing crops. Meanwhile, the yield is increased due to favorable weather conditions and farmers' practices of taking better care of their crops.

For Lao PDR in 2025, the increase in production is attributed to the expansion in planted area and yield. The increase in planted area is driven by the declining prices of competing crops and government policies. The yield is also increased as farmers' practices of improving crop management and using more cassava varieties.

For Myanmar in 2025, the production seemed to have a small increase due to an increase in the harvested area. However, the decrease in planted area is influenced by rising prices of competing crops, while the decrease in yield is influenced by the damage from a flood situation.

For the Philippines in 2025, the decrease in production is attributed to the decrease in yield. The decrease in yield is due to damage from drought and flood situations. However, the increase in planted area is due to high demand as a staple food.

For Thailand in 2025, the decrease in production is attributed to the reduction in planted area and yield. The decrease in planted area is attributed to a low cassava prices, which led to a reduction in the cassava planting area. Furthermore, the yield is decreased due to the damage by drought and disease situations.

For Vietnam in 2025, the increase in production is attributed to the expansion in planted area. The increase in planted area is driven by favorable weather conditions.



Utilization and Stock

In 2025, the estimated domestic utilization of cassava in ASEAN is 47.62 million tons, a decrease of 1.74 million tons, or 3.53 percent, down from the 49.36 million tons in 2024 (Tables 67-68). The beginning stock of cassava is 16.09 million tons, an increase of 7.38 million tons, or 84.70 percent, up from 8.71 million tons in 2024. The ending stock of cassava in 2025 is estimated to be 20.03 million tons, an increase of 3.95 million tons, or 24.52 percent, up from the 16.09 million tons in 2024.

The estimated ratio of production to domestic utilization (self-sufficiency ratio) increases to 160.23 percent in 2025, up from 159.61 percent in 2024 (Table 70, Figure 72).

The ratio of ASEAN's beginning stock to domestic utilization (food security ratio) is estimated to be 33.79 percent in 2025, up from 17.65 percent in 2024 (Table 71, Figure 73).

In discussion, the global cassava trade in 2025 is expected to expand, fueled largely by China's strong demand for cassava chips for use in various industries. Thailand remains a key global exporter, particularly of cassava starch, and is actively promoting sustainable practices through initiatives like the Global Cassava Sustainability Forum 2025⁴⁻⁵. Despite this optimistic global outlook, ASEAN's cassava production declined by 3.16 percent to 76.30 million tons, mainly due to lower output in Cambodia, Indonesia, the Philippines, and Thailand.

However, production increases in Lao PDR, Myanmar, and Vietnam helped moderate the decline. Domestic utilization in ASEAN also decreased, yet exports rose by 8.48 percent to 35.32 million tons, reflecting the region's continued importance in meeting external demand, especially from China. Rising beginning and ending stocks boosted ASEAN's food security ratio to 33.79 percent (Table 1), and the self-sufficiency ratio improved slightly to 160.23 percent (Table 1), indicating that despite production challenges, the region remains capable of meeting domestic needs while expanding its role in global markets.



Trade

ASEAN's cassava exports in 2025 total 35.32 million tons, an increase of 2.76 million tons, or 8.48 percent, from 32.56 million tons in 2024. ASEAN's cassava imports in 2025 are 10.58 million tons, an increase of approximately 0.07 million tons, or 0.67 percent, from 10.51 million tons in 2024 (Tables 67-68, Figures 65-66, and 68-69).

The quantity and value of cassava exports by country of destination and the quantity and value of cassava imports by country of origin are provided in Table 72 and 73, respectively.



Prices

The FOB prices of cassava in Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Thailand, and Vietnam for the years 2024 and 2025, along with the CIF prices in Indonesia, Lao PDR, Malaysia, Myanmar, and Singapore, are provided in Tables 74-75.



Damaged Area

The total damaged area of cassava in ASEAN in 2025 is estimated at 111,591 hectares. The most causes of damage are floods, which affected 419 hectares in Myanmar, and the unspecified damage impacts 111,172 hectares (Table 51).

References:

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5. Thailand Champions Global Cassava Sustainability at 2025 Forum [internet]. Bangkok Post. 2025 [cited 2025 July 28]. Available from: <https://www.bangkokpost.com/thailand/pr/3051800/thailand-champions-global-cassava-sustainability-at-2025-forum>.

Prospects for Cassava in 2026



Production

The forecast for cassava production in ASEAN in 2026 anticipates a total of 74.35 million tons, a decrease of 1.95 million tons, or approximately 2.56 percent, from 76.30 million tons in 2025. A decrease in production is observed in Cambodia, Indonesia, and Lao PDR. On the other hand, an increase in cassava production is expected in Brunei Darussalam, Malaysia, Myanmar, the Philippines, Thailand, and Vietnam (Tables 62-65, Figures 61-64).

For Brunei Darussalam in 2026, the production is expected to increase due to the increase in yield, which results from farmers taking better care of their crops.

For Cambodia in 2026, the decrease in production is attributed to yield. However, the planted area is expected to increase.

For Indonesia in 2026, the production is expected to decrease due to the decrease in planted area. The decrease in planted area may be affected by the declining cassava prices and rising prices of competing crops. Meanwhile, the yield is expected to increase due to favorable weather conditions and farmers' practice of improving crop management.

For Lao PDR in 2026, the production is expected to decrease due to the decrease in planted area and yield. The decrease in planted area may be affected by the declining cassava prices and government policies. Moreover, the yield is expected to decrease due to oversupply of cassava products and farmers' practice of applying less fertilizer.

For Vietnam in 2026, the production is expected to increase due to the increase in the planted area, which is driven by favorable weather conditions.



Utilization and Stock

The forecast for the domestic utilization of cassava in 2026 anticipates a decrease to 46.35 million tons, a reduction of 1.27 million tons, or 2.66 percent, compared to 47.62 million tons in 2025. The beginning stock for 2026 is forecast to increase to 20.03 million tons, an increase of 3.95 million tons, or 24.52 percent, from the 16.09 million tons recorded in 2025. The ending stock for 2026 is expected to be 25.38 million tons, indicating an increase of 5.34 million tons, or 26.66 percent, up from the 20.03 million tons reported in 2025 (Tables 68-69).

The forecasted ratio of production to domestic utilization (self-sufficiency ratio) for 2026 is expected to be 160.40 percent, showing an increase from 160.23 percent in 2025 (Table 70, Figure 72). In terms of the ratio of beginning stock to domestic utilization (food security ratio), for 2026, it is estimated to be 43.22 percent, representing an increase from 33.79 percent in 2025. This indicates a strengthening of the cassava supply situation in 2026 (Table 71, Figure 73).



Trade

The forecast for cassava fresh root exports from ASEAN in 2026 indicates a decrease to 32.84 million tons, a reduction of 2.48 million tons, or 7.01 percent, from 35.32 million tons in 2025. Meanwhile, imports are estimated to decrease to 10.18 million tons in 2026, a decline of approximately 0.39 million tons, or 3.73 percent, down from 10.58 million tons in 2025 (Tables 68-69, Figures 65, 67, 69, and 70).

Table 62. Cassava production in ASEAN countries in 2024 – 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	78,788.70	76,302.62	-2,486.08	-3.16	74,349.14	-1,953.49	-2.56
Brunei	0.43	0.45	0.02	5.00	0.47	0.02	5.00
Cambodia	15,560.58	15,298.44	-262.14	-1.68	14,986.70	-311.74	-2.04
Indonesia	13,748.12	13,051.03	-697.09	-5.07	12,353.93	-697.09	-5.34
Lao PDR	7,402.00	7,482.00	80.00	1.08	6,246.50	-1,235.50	-16.51
Malaysia	41.34	44.87	3.53	8.53	45.41	0.54	1.20
Myanmar	366.11	366.57	0.46	0.13	367.03*	0.46	0.13
Philippines	2,461.50	2,285.54	-175.96	-7.15	2,300.00*	14.46	0.63
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	28,624.31	26,977.73	-1,646.58	-5.75	27,037.18	59.45	0.22
Vietnam	10,584.31	10,796.00	211.69	2.00	11,011.92	215.92	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 63. Cassava planted area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	3,771.73	3,707.19	-64.54	-1.71	3,578.04	-129.15	-3.48
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	773.15	758.56	-14.59	-1.89	768.66	10.10	1.33
Indonesia	436.96	374.30	-62.66	-14.34	311.64	-62.66	-16.74
Lao PDR	295.00	296.50	1.50	0.51	255.00	-41.50	-14.00
Malaysia	2.48	2.55	0.07	3.00	2.63	0.08	3.00
Myanmar	26.19	22.59	-3.60	-13.73	22.30*	-0.29	-1.28
Philippines	228.63*	233.31*	4.69	2.05	230.00*	-3.31	-1.42
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,491.49	1,491.18	-0.31	-0.02	1,449.05	-42.13	-2.83
Vietnam	517.83	528.19	10.36	2.00	538.75	10.56	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 64. Cassava harvested area in ASEAN countries in 2024 – 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	3,695.27	3,595.60	-99.66	-2.70	3,488.68	-106.93	-2.97
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	772.82	757.00	-15.83	-2.05	768.54	11.54	1.52
Indonesia	436.96	374.30	-62.66	-14.34	311.64	-62.66	-16.74
Lao PDR	295.00	296.50	1.50	0.51	255.00	-41.50	-14.00
Malaysia	2.21	2.28	0.07	3.00	2.35	0.07	3.00
Myanmar	22.04	22.17	0.13	0.59	22.30*	0.13	0.59
Philippines	228.63	233.31*	4.69	2.05	230.00*	-3.31	-1.42
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,419.77	1,381.85	-37.92	-2.67	1,360.09	-21.76	-1.57
Vietnam	517.83	528.19	10.36	2.00	538.75	10.56	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 65. Cassava yield in ASEAN countries in 2024 – 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	21.32	21.22	-0.10	-0.47	21.31	0.09	0.42
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	20.13	20.21	0.08	0.40	19.50	-0.71	-3.51
Indonesia	31.46	34.87	3.41	10.84	39.64	4.77	13.68
Lao PDR	25.09	25.23	0.14	0.56	24.50	-0.73	-2.89
Malaysia	18.69	19.70	1.01	5.40	19.35	-0.35	-1.78
Myanmar	16.61	16.53	-0.08	-0.48	16.46	-0.07	-0.42
Philippines	10.77	9.80	-0.97	-9.01	10.00	0.20	2.04
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	20.16	19.52	-0.64	-3.17	19.88	0.36	1.84
Vietnam	20.44	20.44	0.00	0.00	20.44	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

Table 66. Cassava damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectares

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	419	-	-	-	-	111,172	111,591
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	1,565	1,565
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	276	276
Myanmar	419	-	-	-	-	-	419
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	109,331	109,331
Vietnam	-	-	-	-	-	-	-

Remark: - refers to data that is **Not Applicable**.

Table 67. Cassava balance sheet of ASEAN countries in 2024 (cassava fresh root)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	8,711,337	78,788,701	10,507,548	98,007,586	49,363,022	32,554,866	16,089,697	98,007,586
Brunei	-	425	-	425	425	-	-	425
Cambodia	7,078,270	15,560,580	-	22,638,850	9,163,001*	3,859,282*	9,616,567	22,638,850
Indonesia	-	13,748,120	1,087,431	14,835,551	14,751,207	84,344	-	14,835,551
Lao PDR	32,824	7,402,000	59,868	7,494,692	4,004,485	2,382,896	1,107,310	7,494,692
Malaysia	-	41,341	6,695	48,036	47,263*	774	-	48,036
Myanmar	50,539	366,110	260*	416,909	378,536	2,000*	36,373	416,909
Philippines	-	2,461,502	130,000	2,591,502	2,589,902*	1,600*	-	2,591,502
Singapore	-	-	1,692	1,692	1,690	2	-	1,692
Thailand	1,164,261	28,624,312	9,000,000	38,788,573	10,800,000	23,600,000	4,388,573	38,788,573
Vietnam	385,443	10,584,310	221,602	11,191,355	7,626,513	2,623,968	940,874	11,191,355

Remark: * is noted that the value is estimated by the AFSIS Secretariat.**Table 68.** Cassava balance sheet of ASEAN countries in 2025 (cassava fresh root)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	16,089,697	76,302,623	10,578,158	102,970,479	47,620,031	35,316,152	20,034,296	102,970,479
Brunei	-	447	-	447	447	-	-	447
Cambodia	9,616,567	15,298,441	-	24,915,009	9,008,638*	3,000,000*	12,906,371	24,915,009
Indonesia	-	13,051,026	939,737	13,990,763	13,733,828	256,935	-	13,990,763
Lao PDR	1,107,310	7,482,000	51,353	8,640,664	3,602,861	4,756,939	280,864	8,640,664
Malaysia	-	44,868	7,721*	52,588	51,888*	700*	-	52,588
Myanmar	36,373	366,570	200*	403,143	374,313	2,000*	26,830	403,143
Philippines	-	2,285,541	160,000	2,445,541	2,443,741*	1,800*	-	2,445,541
Singapore	-	-	1,537	1,537	1,537	-	-	1,537
Thailand	4,388,573	26,977,735	9,000,000	40,366,308	10,700,000	23,000,000	6,666,308	40,366,308
Vietnam	940,874	10,795,996	417,610	12,154,480	7,702,779	4,297,778	153,923	12,154,480

Remark: * is noted that the value is estimated by the AFSIS Secretariat.**Table 69.** Cassava balance sheet of ASEAN countries in 2026 (cassava fresh root)

Unit: Tons

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	20,034,296	74,349,135	10,183,823	104,567,254	46,351,790	32,839,356	25,376,108	104,567,254
Brunei	-	469	-	469	469	-	-	469
Cambodia	12,906,371	14,986,702	-	27,893,073	9,008,638*	3,000,000*	15,884,435	27,893,073
Indonesia	-	12,353,931	707,602	13,061,533	12,734,285	327,248	-	13,061,533
Lao PDR	280,864	6,246,500	61,816	6,589,180	3,245,937	3,216,060	127,183	6,589,180
Malaysia	-	45,406	8,000*	53,406	52,776*	630*	-	53,406
Myanmar	26,830	367,031	200*	394,061	370,065*	2,000*	21,996	394,061
Philippines	-	2,300,000	160,000*	2,460,000	2,458,200*	1,800*	-	2,460,000
Singapore	-	-	1,615	1,615	1,613	1	-	1,615
Thailand	6,666,308	27,037,181	9,000,000*	42,703,489	10,700,000*	23,000,000*	9,003,489	42,703,489
Vietnam	153,923	11,011,916	244,590	11,410,429	7,779,806	3,291,617	339,006	11,410,429

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 70. Ratio of cassava production to domestic utilization in ASEAN countries (self-sufficiency ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	78,788,701	49,363,022	159.61	76,302,623	47,620,031	160.23	74,349,135	46,351,790	160.40
Brunei	425	425	100.00	447	447	100.00	469	469	100.00
Cambodia	15,560,580	9,163,001	169.82	15,298,441	9,008,638	169.82	14,986,702	9,008,638	166.36
Indonesia	13,748,120	14,751,207	93.20	13,051,026	13,733,828	95.03	12,353,931	12,734,285	97.01
Lao PDR	7,402,000	4,004,485	184.84	7,482,000	3,602,861	207.67	6,246,500	3,245,937	192.44
Malaysia	41,341	47,263	87.47	44,868	51,888	86.47	45,406	52,776	86.04
Myanmar	366,110	378,536	96.72	366,570	374,313	97.93	367,031	370,065	99.18
Philippines	2,461,502	2,589,902	95.04	2,285,541	2,443,741	93.53	2,300,000	2,458,200	93.56
Singapore	0.00	1,690	0.00	0.00	1,537	0.00	0.00	1,613	0.00
Thailand	28,624,312	10,800,000	265.04	26,977,735	10,700,000	252.13	27,037,181	10,700,000	252.68
Vietnam	10,584,310	7,626,513	138.78	10,795,996	7,702,779	140.16	11,011,916	7,779,806	141.54

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 71. Ratio of cassava beginning stock to domestic utilization in ASEAN countries (food security ratio) in 2024 – 2026

Unit: Tons

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	8,711,337	49,363,022	17.65	16,089,697	47,620,031	33.79	20,034,296	46,351,790	43.22
Brunei	-	425	-	-	447	-	-	469	-
Cambodia	7,078,270	9,163,001	77.25	9,616,567	9,008,638	106.75	12,906,371	9,008,638	143.27
Indonesia	-	14,751,207	-	-	13,733,828	-	-	12,734,285	-
Lao PDR	32,824	4,004,485	0.82	1,107,310	3,602,861	30.73	280,864	3,245,937	8.65
Malaysia	-	47,263	-	-	51,888	-	-	52,776	-
Myanmar	50,539	378,536	13.35	36,373	374,313	9.72	26,830	370,065	7.25
Philippines	-	2,589,902	-	-	2,443,741	-	-	2,458,200	-
Singapore	0.00	1,690	0.00	0.00	1,537	0.00	0.00	1,613	0.00
Thailand	1,164,261	10,800,000	10.78	4,388,573	10,700,000	41.01	6,666,308	10,700,000	62.30
Vietnam	385,443	7,626,513	5.05	940,874	7,702,779	12.21	153,923	7,779,806	1.98

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

Table 72. Quantity and value of cassava exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	Thailand	413,288	30,996,563	1,653,150	120,266,663	-	-	1,653,150	120,266,663
	Vietnam	1,239,863	89,270,100						
Indonesia	Malaysia	233.79	77,108	4,538	1,911,067	3,220	2,417,277	7,758	4,328,344
	Philippines	4,301	1,830,520						
	Singapore	0.006	10						
	Thailand	3.25	3,429						
Lao PDR	Thailand	3,720,874	186,792,455	4,230,275	219,962,034	526,663	55,229,636	4,756,939	275,191,670
	Vietnam	509,402	33,169,579						
Malaysia	Singapore	167	81,026	167	81,026	7.00	34,179	174	115,205
Myanmar	Malaysia	780	142,500	15,745	2,344,500	-	-	15,745	2,344,500
	Thailand	14,965	2,202,000						
Philippines	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	877	154,264	1,525,338	145,796,862	9,634,104	825,426,275	11,159,442	971,223,137
	Cambodia	1,928	265,536						
	Indonesia	557,819	49,090,230						
	Lao PDR	165,281	14,686,564						
	Malaysia	448,313	42,968,484						
	Myanmar	14,657	1,850,331						
	Philippines	183,205	20,792,805						
	Singapore	151,489	15,695,392						
	Vietnam	1,769	293,256						
Vietnam	Malaysia	12,024	4,556,602	22,227	8,456,375	1,580,642	477,309,006	1,602,869	485,765,381
	Philippines	10,203	3,899,773						

Remark: - is noted that the value is **Not Applicable**.

Table 73. Quantity and value of cassava imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-	-	-
Indonesia	Cambodia	114	41,154	145,695	55,400,053	0.61	3,200	145,696	55,403,253
	Malaysia	12	6,216						
	Thailand	145,551	55,344,593						
	Vietnam	19	8,090						
Lao PDR	Thailand	51,353	5,888,625	51,353	5,888,625	-	-	51,353	5,888,625
Malaysia	Myanmar	135	44,191	274	110,465	1,656	1,921,969	1,930	2,032,435
	Thailand	4	1,802						
	Vietnam	135	64,472						
Myanmar	Thailand	570	323,000	570	323,000	-	-	570	323,000
Philippines	-	-	-	-	-	-	-	-	-
Singapore	Indonesia	1.52	9,508	1,534	530,451	2.73	12,191	1,537	542,642
	Malaysia	1,532	520,746						
	Thailand	0.41	196						
Thailand	Cambodia	1,417,504	97,627,726	7,176,300	498,000,954	39,204	23,374,564	7,215,503	521,375,518
	Indonesia	691	227,917						
	Lao PDR	5,719,813	396,415,475						
	Malaysia	185	161,786						
	Myanmar	33,908	2,367,746						
	Philippines	0.039	85						
	Singapore	7.40	437,646						
	Vietnam	4,192	762,573						
Vietnam	Lao PDR	-	26,782,966	-	27,071,213	-	2,098,869	-	29,170,082
	Thailand	-	288,247						

Remark: - is noted that the value is **Not Applicable**.

Table 74. FOB prices of cassava in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia	Starch	2024	585	580	485	457	520	580	576	580	575	581	521	599	553
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
	Shredded	2024	230	258	233	244	230	249	245	240	246	270	275	273	249
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
	Pellets	2024	145	145	145	145	145	145	150	148	148	149	149	150	147
Indonesia	Starch - HS-code 07141011	2025	149	149	150	151	151	152	-	-	-	-	-	-	150
		2024	1,938	1,844	1,423	1,867	2,298	1,867	1,743	1,648	1,671	1,738	1,518	1,421	1,748
	Starch	2025	2,086	1,773	1,862	829	-	-	-	-	-	-	-	-	1,638
		2024	403	344	356	480	459	451	472	404	479	349	443	483	427
	Pellets	2025	372	358	326	309	-	-	-	-	-	-	-	-	341
Lao PDR	Shredded	2024	159	162	195	182	144	158	219	144	135	132	136	156	160
		2025	153	144	145	143	-	-	-	-	-	-	-	-	146
	Pellets	2024	0	0	0	0	0	0	0	89	90	88	66	78	82
		2025	78	56	55	64	-	-	-	-	-	-	-	-	63
	Pellets - HS-code 07141011	2024	0	5,909	0	4,196	0	3,079	0	0	0	1,267	2,414	0	1,405
Malaysia	- HS-code 07141011	2025	0	4,761	5,033	-	-	-	-	-	-	-	-	-	3,265
		2024	0	0	0	0	0	1,978	0	0	0	2,201	15,509	0	1,641
	- HS-code 07141011	2025	0	0	0	-	-	-	-	-	-	-	-	-	0
		2024	270	374	392	436	328	512	224	429	508	554	470	476	414
	- HS-code 07141011	2025	495	493	472	-	-	-	-	-	-	-	-	-	487
Myanmar	Starch	2024	0	0	0	0	0	0	0	0	0	0	1,847	0	154
		2025	0	0	0	-	-	-	-	-	-	-	-	-	0
	Starch	2024	333	333	400	333	333	0	333	333	333	0	0	0	341
		2025	351	154	147	143	-	-	-	-	-	-	-	-	199
	Pellets	2024	576	573	573	568	551	542	521	520	512	484	467	445	528
Thailand	Shredded	2025	415	420	418	406	416	-	-	-	-	-	-	-	415
		2024	357	359	301	358	313	267	313	300	260	284	337	334	315
	Pellets	2025	344	198	200	193	-	-	-	-	-	-	-	-	234
		2024	257	250	252	240	230	234	243	243	242	236	215	195	236
	Not specified	2025	185	185	185	185	191	-	-	-	-	-	-	-	186
Vietnam	Not specified	2024	462	448	451	440	438	483	484	454	469	432	393	365	443
		2025	336	314	285	288	289	-	-	-	-	-	-	-	303

Remark: - is noted that the value is **Not Applicable**.

Table 75. CIF prices of cassava in selected ASEAN countries

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Starch - HS-code 07141011	2024	0	0	299	295	294	294	0	0	289	289	289	0	293
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
Lao PDR	Starch	2024	491	563	512	469	475	400	504	484	434	471	466	489	480
		2025	419	369	365	368	-	-	-	-	-	-	-	-	380
	Shredded	2024	178	173	196	170	0	0	0	0	0	0	0	0	179
		2025	145	-	-	-	-	-	-	-	-	-	-	-	145
Malaysia	Pellets - HS-code 0714101100	2024	0	2,690	0	420	0	0	0	0	0	385	0	0	291
		2025	0	346	348	-	-	-	-	-	-	-	-	-	231
	- HS-code 0714101900	2024	0	0	0	0	0	1,494	0	0	0	1,497	411	0	284
		2025	0	0	0	-	-	-	-	-	-	-	-	-	0
	- HS-code 0714109900	2024	1,049	1,170	1,200	1,206	1,320	1,338	1,145	1,550	1,172	1,189	1,198	1,117	1,221
		2025	1,133	1,199	1,178	-	-	-	-	-	-	-	-	-	1,170
Myanmar	Starch	2024	0	0	0	0	0	0	0	0	0	0	0	0	0
		2025	-	617	515	515	-	-	-	-	-	-	-	-	549
Singapore	Not specified	2024	371	334	360	369	339	406	560	548	525	536	523	344	435
		2025	337	365	373	337	404	415	550	528	476	412	374	426	416

Remark: - is noted that the value is **Not Applicable**.

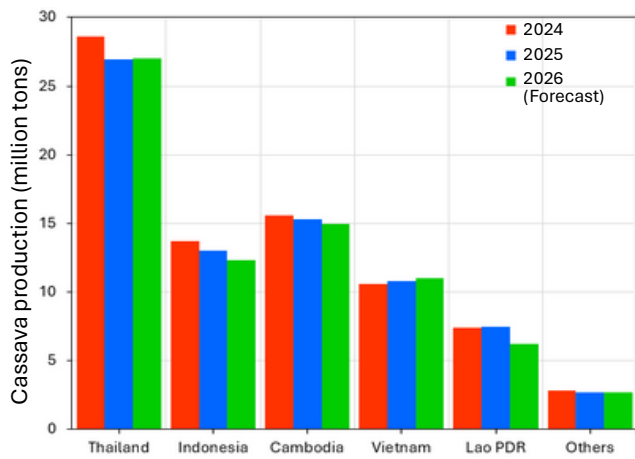


Figure 61. Cassava production of selected countries in ASEAN in 2024-2026

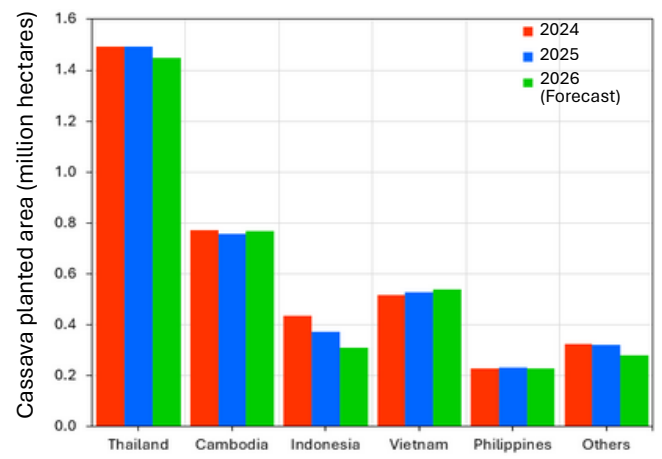


Figure 62. Cassava planted area of selected countries in ASEAN in 2024-2026

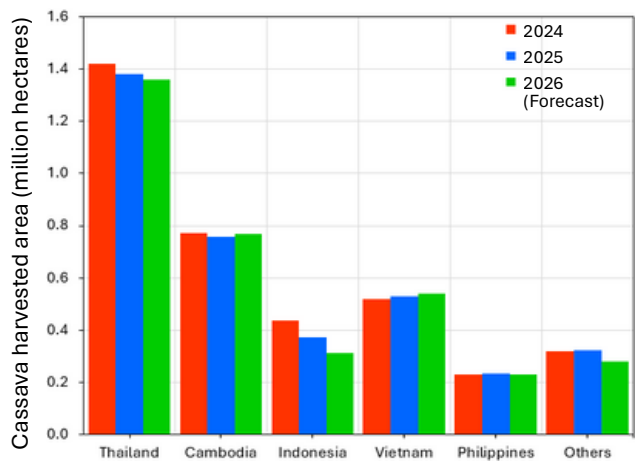


Figure 63. Cassava harvested area of selected countries in ASEAN in 2024-2026

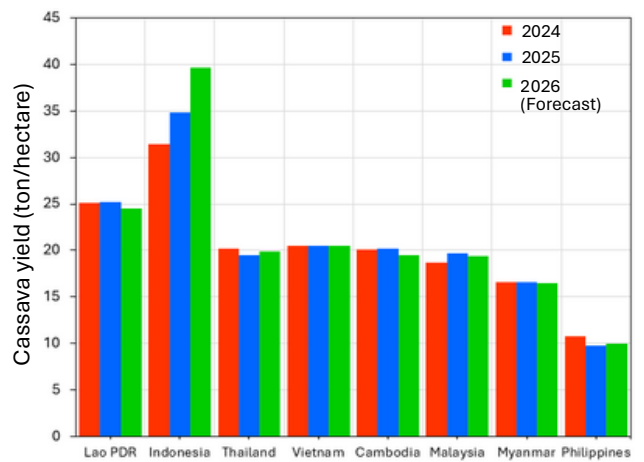


Figure 64. Cassava yield of selected countries in ASEAN in 2024-2026

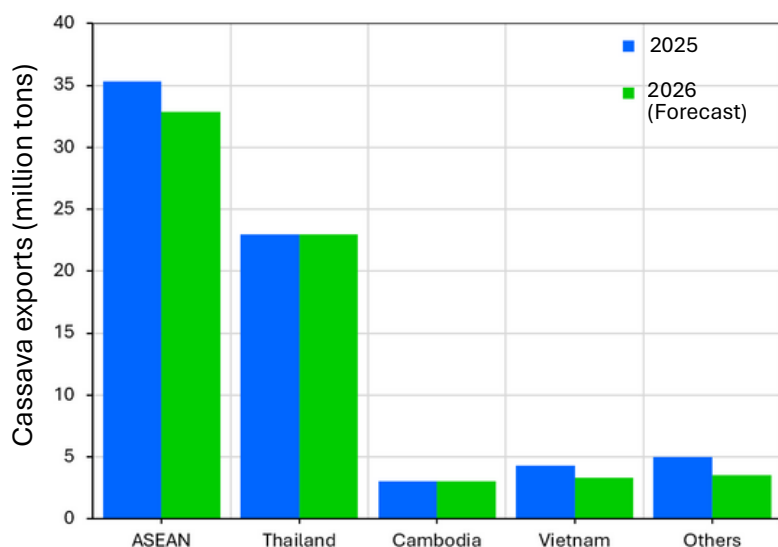
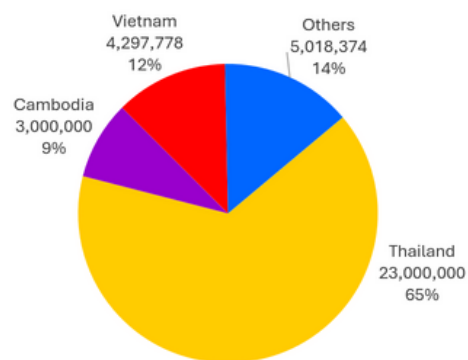
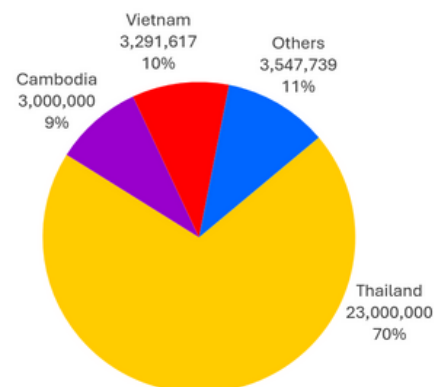


Figure 65. Amount of cassava exports of selected countries in ASEAN in 2025-2026



Total 35.32 million tons

Figure 66. Share of cassava exports (tons) among ASEAN countries in 2025



Total 32.84 million tons

Figure 67. Share of cassava exports (tons) among ASEAN countries in 2026

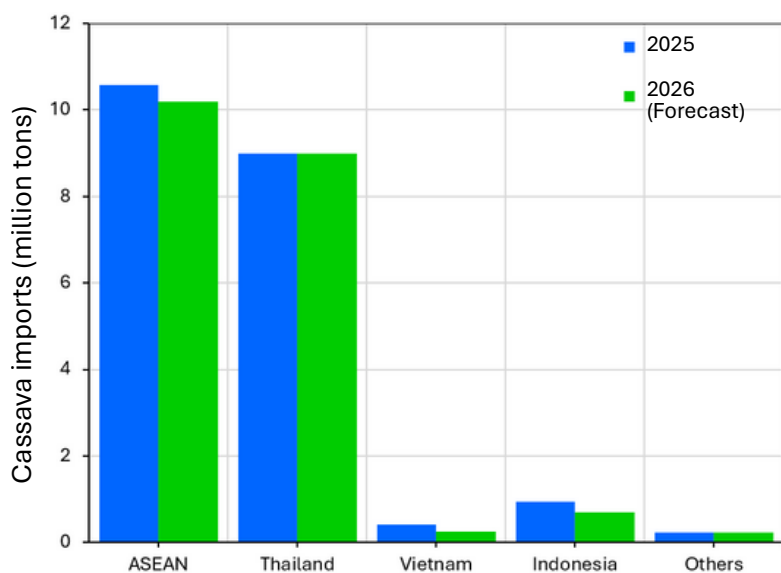
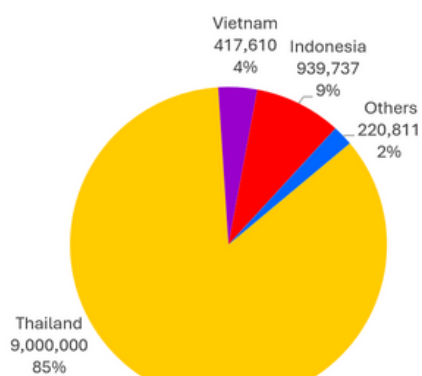
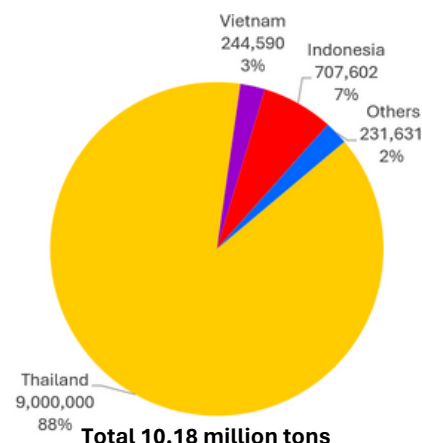


Figure 68. Amount of cassava imports of selected countries in ASEAN in 2025-2026



Total 10.58 million tons

Figure 69. Share of cassava imports (tons) among ASEAN countries in 2025



Total 10.18 million tons

Figure 70. Share of cassava imports (tons) among ASEAN countries in 2026

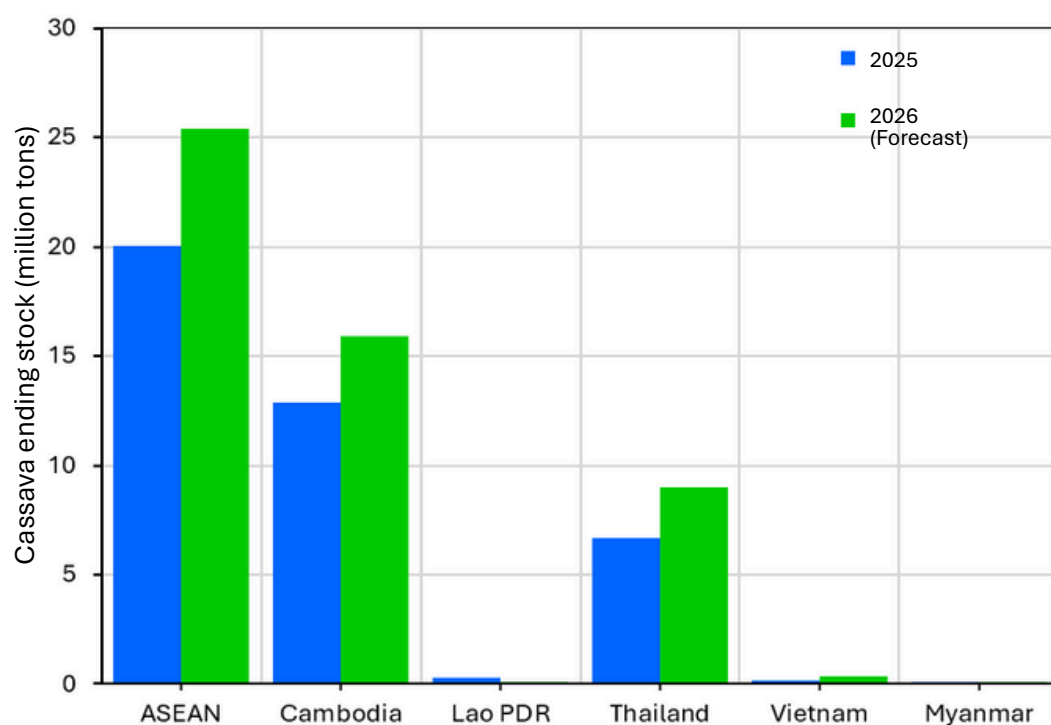


Figure 71. Amount of ending stock of cassava in ASEAN in 2025-2026

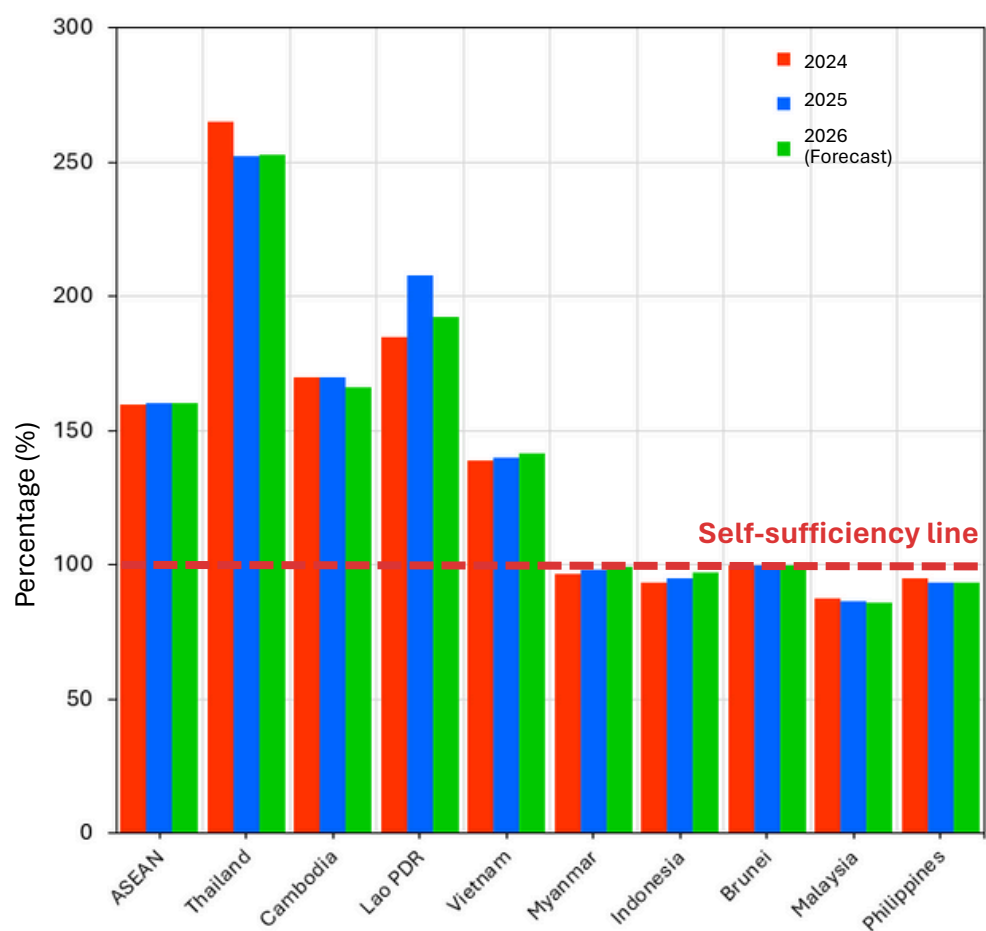


Figure 72. Ratio of cassava production to domestic utilization in ASEAN in 2024-2026

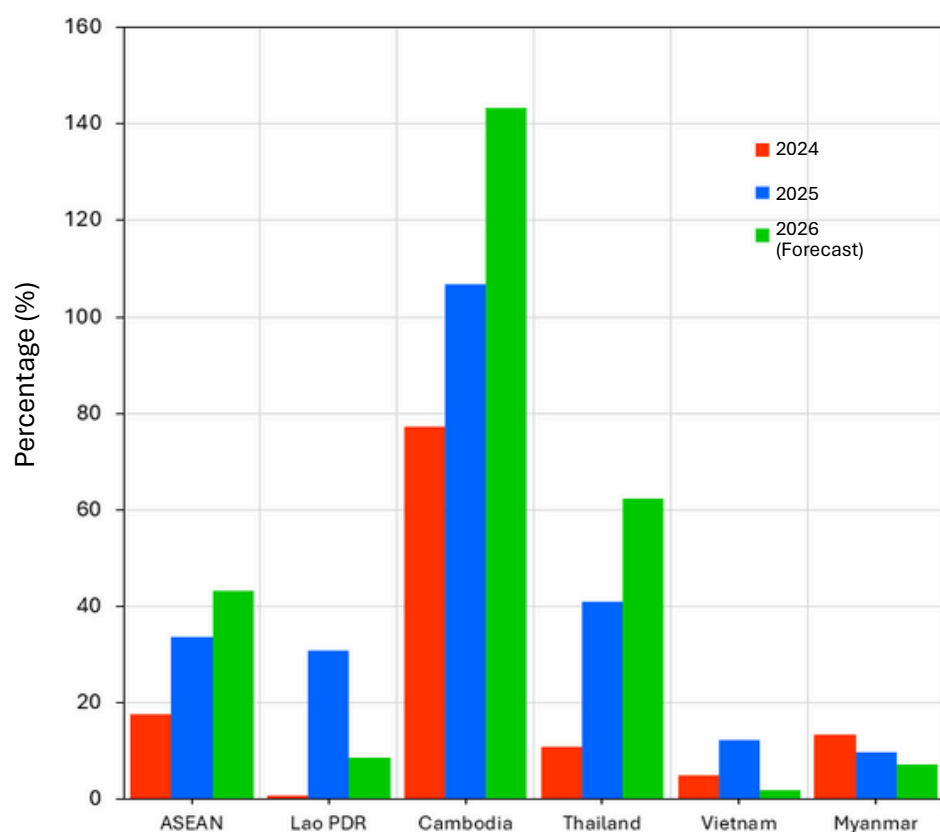


Figure 73. Ratio of cassava beginning stock to domestic utilization in ASEAN in 2024-2026

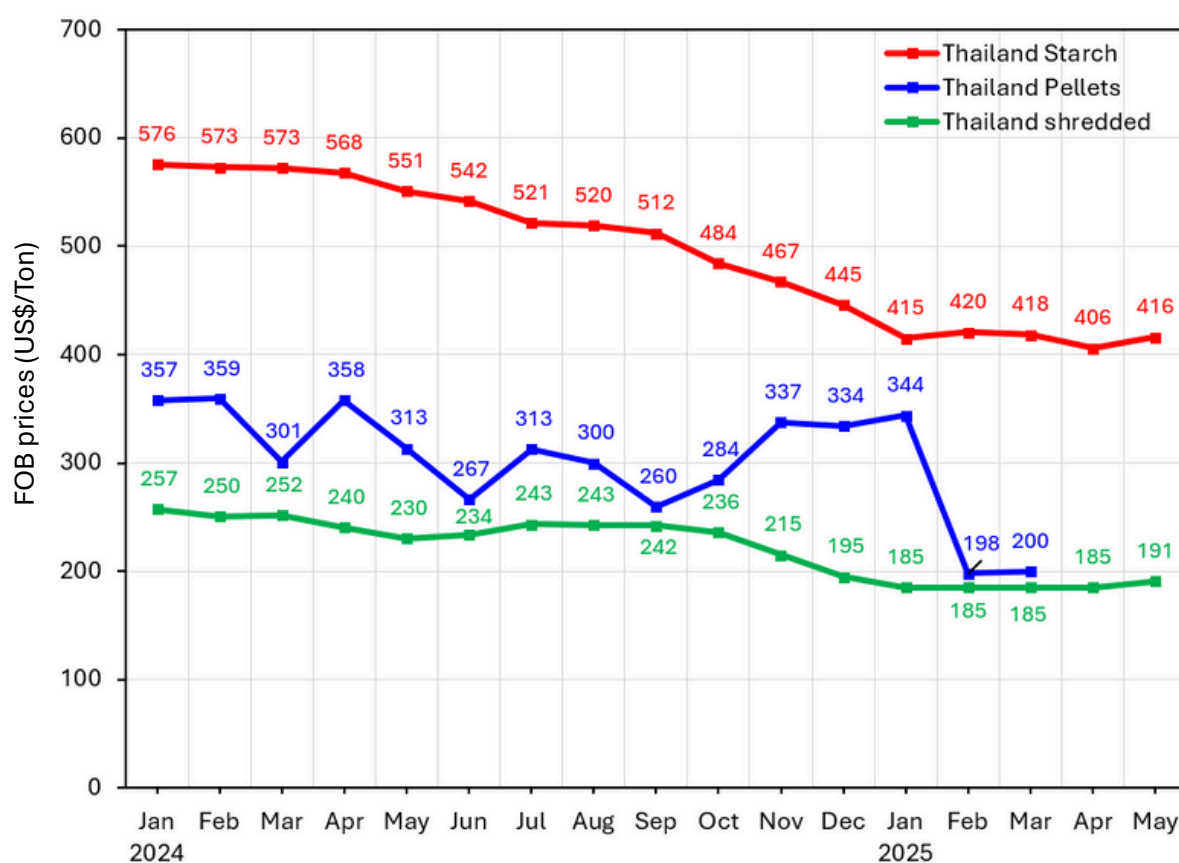


Figure 74. FOB prices (US\$/ton) of cassava of selected countries in ASEAN in 2024-2025

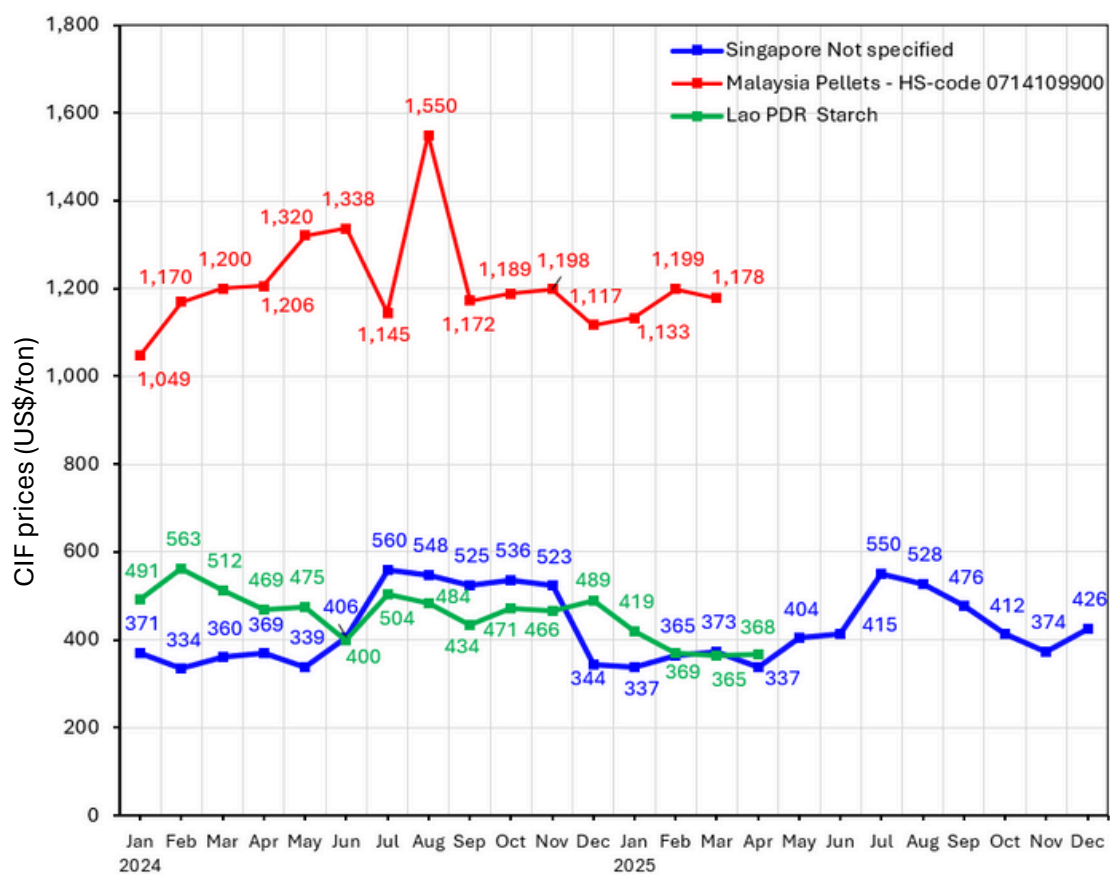


Figure 75. CIF prices (US\$/ton) of cassava of selected countries in ASEAN in 2024-2025

Explanatory Notes

Production of Paddy for 2025 (crop year 2024/25)

Brunei Darussalam

- Wet season refers to the crop harvested during January to May 2025.
- Dry season refers to the crop harvested during July to November 2025.

Cambodia

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to April 2025.

Indonesia

- Wet season refers to the crop harvested during September 2024 to February 2025.
- Dry season refers to the crop harvested during May to August 2025.

Lao PDR

- Wet season refers to the crop harvested during September to December 2024.
- Dry season refers to the crop harvested during March to May 2025.

Malaysia

- Wet season refers to the crop harvested during September 2024 to February 2025.
- Dry season refers to the crop harvested during March to August 2025.

Myanmar

- Wet season refers to the crop harvested during August 2024 to February 2025.
- Dry season refers to the crop harvested during February to April 2025.

The Philippines

- Wet season refers to the crop harvested during July to December 2024.
- Dry season refers to the crop harvested during January to March 2025.

Thailand

- Wet season refers to the crop harvested during July 2024 to May 2025.
- Dry season refers to the crop harvested during February to September 2024.

Vietnam

- **Spring season**
 - North region refers to the crop harvested during May to July 2025.
 - South region refers to the crop harvested during February to May 2025.
- **Autumn season**
 - North region refers to the crop harvested during August to October 2025.
 - South region refers to the crop harvested during July to September 2025.
- **Winter season**
 - North region refers to the crop harvested during October to November 2025.
 - South region refers to the crop harvested during October to December 2025.

Production of Maize for 2025 (crop year 2024/25)

Brunei Darussalam

- Wet season refers to the crop harvested during January to June 2025.
- Dry season refers to the crop harvested during July to December 2025.

Cambodia

- Wet season refers to the crop harvested during October to November 2025.
- Dry season refers to the crop harvested during June to July 2025.

Indonesia

- 1st crop harvested during January to April 2025.
- 2nd crop harvested during May to August 2025.
- 3rd crop harvested during September to December 2025.

Lao PDR

- Wet season refers to the crop harvested during September to December 2025.
- Dry season refers to the crop harvested during March to May 2025.

Malaysia

- Dry season refers to the crop harvested during May 2025.

Myanmar

- Wet season refers to the crop harvested during August 2024 to January 2025.
- Dry season refers to the crop harvested during January to April 2025.

The Philippines

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to March 2025.

Thailand

- Wet season refers to the crop harvested during July 2024 to January 2025.
- Dry season refers to the crop harvested during February to May 2025.

Vietnam

- 1st crop harvested during February to June 2025.
- 2nd crop harvested during October to November 2025.

Production of Sugarcane for 2025 (crop year 2024/25)

Brunei Darussalam

- The crop harvested during January to December 2025.

Cambodia

- The crop harvested during October to December 2024.

Indonesia

- The crop harvested during September 2024 to December 2025.

Lao PDR

- The crop harvested during January to May 2025.

Myanmar

- The crop harvested during November 2024 to March 2025.

The Philippines

- The crop harvested during October 2024 to May 2025.

Thailand

- The crop harvested during December 2024 to May 2025.

Vietnam

- The crop harvested during November 2024 to May 2025.

Production of Soybean for 2025 (crop year 2024/25)

Cambodia

- Wet season refers to the crop harvested during January to February 2025.
- Dry season refers to the crop harvested during October to December 2025.

Indonesia

- 1st crop harvested during January to April 2025.
- 2nd crop harvested during May to August 2025.
- 3rd crop harvested during September to December 2025.

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 2025.

Myanmar

- Wet season refers to the crop harvested during August 2024 to January 2025.
- Dry season refers to the crop harvested during January to April 2025.

The Philippines

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to June 2025.

Thailand

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to May 2025.

Vietnam

- Wet season refers to the crop harvested during February to May 2025.
- Dry season refers to the crop harvested during August to November 2025.

Production of Cassava for 2025 (crop year 2024/25)

Brunei Darussalam

- The crop harvested during August 2024 to December 2025.

Cambodia

- The crop harvested during January to February 2025.

Indonesia

- 1st crop harvested during January to April 2025.
- 2nd crop harvested during May to August 2025.
- 3rd crop harvested during September to December 2025.

Lao PDR

- The crop harvested during December 2024 to March 2025.

Malaysia

- The crop harvested during October 2024 to December 2025.

Myanmar

- The crop harvested during September 2024 to June 2025.

The Philippines

- 1st crop harvested during August to December 2024.
- 2nd crop harvested during January to June 2025.

Thailand

- The crop harvested during October 2024 to September 2025.

Vietnam

- Wet season refers to the crop harvested during February to May 2025.
- Dry season refers to the crop harvested during January to March 2025.
- Domestic utilization, stock, import, and export refer to a calendar year.
- N/A noted that the data is not available due to no collecting or reporting systems in the country yet.
- Nil indicates as a small amount.

Milling Rate of Rice (2025)

Country	Paddy (Ton)	Milling rate (%)
ASEAN	1	64
Brunei	1	65
Cambodia	1	64
Indonesia	1	64
Lao PDR	1	60
Malaysia	1	64
Myanmar	1	63
Philippines	1	67
Thailand	1	65
Vietnam	1	65

Extraction Rate of Sugar (2025)

Country	Sugarcane (Ton)	Extraction rate (%)
ASEAN	1,000	109
Cambodia	1,000	100
Indonesia	1,000	95
Lao PDR	1,000	200
Myanmar	1,000	80
Philippines	1,000	80
Thailand	1,000	107
Vietnam	1,000	100

ANNEX 1

Rice crop calendar (harvested month) for crop year 2024/25 (2025) in ACO No. 34 report

Country	Season	2024						2025												2026	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet																				
	Dry																				
Cambodia	Wet																				
	Dry																				
Indonesia	Wet																				
	Dry																				
Lao PDR	Wet																				
	Dry																				
Malaysia	Wet																				
	Dry																				
Myanmar	Wet																				
	Dry																				
Philippines	Wet																				
	Dry																				
Thailand	Wet																				
	Dry																				
Vietnam	Spring - North																				
	Spring - South																				
	Autumn - North																				
	Autumn - South																				
	Winter - North																				
	Winter - South																				

ANNEX 2

Maize crop calendar (harvested month) for crop year 2024/25 (2025) in ACO No. 34 report

Country	Season/Crop	2024						2025												2026	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet																				
	Dry																				
Cambodia	Wet																				
	Dry																				
Indonesia	1 st																				
	2 nd																				
	3 rd																				
Lao PDR	Wet																				
	Dry																				
Malaysia	Wet																				
	Dry																				
Myanmar	Wet																				
	Dry																				
Philippines	Wet																				
	Dry																				
Thailand	Wet																				
	Dry																				
Vietnam	1 st																				
	2 nd																				

ANNEX 3

Sugarcane crop calendar (harvested month) for crop year 2024/25 (2025) in ACO No. 34 report

Country	2024				2025											
	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 month) for crop year 2024/25 (2025) in ACO No. 34 report

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

ANNEX 5

Cassava crop calendar (harvested month) for crop year 2024/25 (2025) in ACO No. 34 report

Country	Crop	2024					2025											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei	-																	
Cambodia	-																	
Indonesia	1 st																	
	2 nd																	
	3 rd																	
Lao PDR	-																	
Malaysia	-																	
Myanmar	-																	
Philippines	1 st																	
	2 nd																	
Thailand	-																	
Vietnam	North																	
	South																	



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