



ASEAN FOOD SECURITY INFORMATION SYSTEM

ASEAN AGRICULTURAL COMMODITY OUTLOOK

NO. 30 June 2023



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

Report on

ASEAN Agricultural Commodity Outlook

No. 30 June 2023

*Released by
AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
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The ACO report activity represents the hard work and well collaboration between the ASEAN member countries. The ACO report No.30 and the previous ACO reports would be beneficial and useful for all ASEAN members, policy makers, and other relevant agencies who need agricultural information for planning and creating the policies to ensure the food security in their countries and the ASEAN region.

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Thank you



Dr. Sumanya Ngandee (PhD)
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Foreword

ASEAN Agricultural Commodity Outlook (ACO) Report is published semi-annually by the ASEAN Food Security Information System (AFSIS) Secretariat, using the data gathered from 10 ASEAN member states. Like previous editions, this report covers a current situation and a prospect of 5 main commodities including rice, maize, sugarcane, soybeans, and cassava.

In this latest of ASEAN Agricultural Commodity Outlook, it provides 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



Content

	Page
Acknowledgement	I
Foreword	II
Highlights of Rice Outlook for 2024	1
ASEAN Rice Situation in 2023	2
Prospects for Rice in 2024	4
Highlights of Maize Outlook for 2024	17
ASEAN Maize Situation in 2023	18
Prospects for Maize in 2024	20
Highlights of Sugar Outlook for 2024	33
ASEAN Sugar Situation in 2023	34
Prospects for Sugar in 2024	36
Highlights of Soybean Outlook for 2024	50
ASEAN Soybean Situation in 2023	51
Prospects for Soybean in 2024	53
Highlights of Cassava Outlook for 2024	66
ASEAN Cassava Situation in 2023	67
Prospects for Cassava in 2024	69
Explanatory Notes	82
Milling Rate of Rice (2023)	87
Extraction Rate of Sugar (2023)	87

ANNEX

1	Rice crop calendar (harvested months) for crop year 2022/23 (2023)	88
2	Maize crop calendar (harvested months) for crop year 2022/23 (2023)	89
3	Sugarcane crop calendar (harvested months) for crop year 2022/23 (2023)	90
4	Soybean crop calendar (harvested months) for crop year 2022/23 (2023)	91
5	Cassava crop calendar (harvested months) for crop year 2022/23 (2023)	92

List of Tables

Table	Page
1 Summary of the ASEAN rice situation, 2023-2024 (milled rice)	1
2 Paddy production in ASEAN countries, 2022-2024	4
3 Paddy planted area in ASEAN countries, 2022-2024	5
4 Paddy harvested area in ASEAN countries, 2022-2024	5
5 Paddy yield in ASEAN countries, 2022-2024	5
6 Paddy damaged area in ASEAN by cause of damage, 2023	6
7 Rice balance sheet of ASEAN countries, 2022 (milled rice)	6
8 Rice balance sheet of ASEAN countries, 2023 (milled rice)	6
9 Rice balance sheet of ASEAN countries, 2024 (milled rice)	7
10 Ratio of rice production to domestic utilization in ASEAN countries, 2022-2024	8
11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2022-2024	8
12 Quantity and Value of Rice Export by Countries of Destination in 2023	9
13 Quantity and Value of Rice Import by Countries of Origin in 2023	10
14 FOB Price of rice in selected ASEAN countries	11
15 CIF Price of rice in selected ASEAN countries	11
16 Summary of the ASEAN maize situation, 2023-2024	17
17 Maize production in ASEAN countries, 2022-2024	21
18 Maize planted area in ASEAN countries, 2022-2024	21
19 Maize harvested area in ASEAN countries 2022-2024	21
20 Maize yield in ASEAN countries, 2022-2024	22
21 Maize damaged area in ASEAN by cause of damage, 2023	22
22 Maize balance sheet of ASEAN countries, 2022	23
23 Maize balance sheet of ASEAN countries, 2023	23
24 Maize balance sheet of ASEAN countries, 2024	23
25 Ratio of maize production to domestic utilization in ASEAN countries, 2022-2024	24
26 Ratio of maize beginning stock to domestic utilization in ASEAN Countries, 2022-2024	24

List of Tables (Continued)

Table		Page
27	Quantity and Value of Maize Export by Countries of Destination in 2023	25
28	Quantity and Value of Maize Import by Countries of Origin in 2023	26
29	FOB Price of maize (Feed grain) in selected ASEAN countries	27
30	CIF Price of maize (Feed grain) in selected ASEAN countries	27
31	Summary of the ASEAN sugar situation, 2023-2024	33
32	Sugarcane production in ASEAN countries, 2022-2024	37
33	Sugarcane planted area in ASEAN countries, 2022-2024	37
34	Sugarcane harvested area in ASEAN countries, 2022-2024	37
35	Sugarcane yield in ASEAN countries, 2022-2024	38
36	Sugarcane damaged area in ASEAN by cause of damage, 2023	38
37	Sugar balance sheet of ASEAN countries, 2022	39
38	Sugar balance sheet of ASEAN countries, 2023	39
39	Sugar balance sheet of ASEAN countries, 2024	40
40	Ratio of sugar production to domestic utilization in ASEAN countries, 2022-2024	41
41	Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2022-2024	41
42	Quantity and Value of Sugar Export by Countries of Destination in 2023	42
43	Quantity and Value of Sugar Import by Countries of Origin in 2023	43
44	FOB Price of sugar in selected ASEAN countries	44
45	CIF Price of sugar in selected ASEAN countries	44
46	Summary of the ASEAN soybean situation, 2023-2024	50
47	Soybean production in ASEAN countries, 2022-2024	54
48	Soybean planted area in ASEAN countries, 2022-2024	54
49	Soybean harvested area in ASEAN countries, 2022-2024	54
50	Soybean yield in ASEAN countries, 2022-2024	55
51	Soybean damaged area in ASEAN by cause of damage, 2023	55
52	Soybean balance sheet of ASEAN countries, 2022	56
53	Soybean balance sheet of ASEAN countries, 2023	56
54	Soybean balance sheet of ASEAN countries, 2024	56

List of Tables (Continued)

Table	Page
55 Ratio of soybean production to domestic utilization in ASEAN countries, 2022-2024	57
56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2022-2024	57
57 Quantity and Value of Soybean Export by Countries of Destination in 2023	58
58 Quantity and Value of Soybean Import by Countries of Origin in 2023	59
59 FOB Price of soybean in selected ASEAN countries	60
60 CIF Price of soybean in selected ASEAN countries	60
61 Summary of the ASEAN cassava situation, 2022-2024	66
62 Cassava production in ASEAN countries, 2022-2024	70
63 Cassava planted area in ASEAN countries, 2022-2024	70
64 Cassava harvested area in ASEAN countries, 2022-2024	70
65 Cassava yield in ASEAN countries, 2022-2024	71
66 Cassava damaged area in ASEAN by cause of damage, 2023	71
67 Cassava balance sheet of ASEAN countries, 2022 (Cassava roots fresh)	72
68 Cassava balance sheet of ASEAN countries, 2023 (Cassava roots fresh)	72
69 Cassava balance sheet of ASEAN countries, 2024 (Cassava roots fresh)	72
70 Ratio of cassava production to domestic utilization in ASEAN countries, 2022-2024	73
71 Ratio of cassava beginning stock to domestic utilization in ASEAN Countries, 2022-2024	73
72 Quantity and Value of Cassava Export by Countries of Destination in 2023	74
73 Quantity and Value of Cassava Import by Countries of Origin in 2023	75
74 FOB Price of Cassava in selected ASEAN countries	76
75 CIF Price of Cassava in selected ASEAN countries	76

List of Figures

Figure		Page
1	Paddy production of selected countries in ASEAN, 2022-2024	12
2	Paddy planted area of selected countries in ASEAN, 2022-2024	12
3	Paddy harvested area of selected countries in ASEAN, 2022-2024	12
4	Paddy yield of countries in ASEAN, 2022-2024	13
5	Amount of rice export (million tons) of selected countries in ASEAN, 2023-2024	13
6	Share of rice export (tons) among ASEAN countries, 2023	13
7	Share of rice export (tons) among ASEAN countries, 2024	13
8	Amount of rice import (million tons) by selected countries in ASEAN, 2023-2024	14
9	Share of rice import (tons) among ASEAN countries, 2023	14
10	Share of rice import (tons) among ASEAN countries, 2024	14
11	Amount of ending stock of rice in ASEAN countries in 2023-2024	14
12	Ratio of rice production to domestic utilization in ASEAN countries, 2022-2024	15
13	Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2022-2024	15
14	FOB price (US\$/Ton) of milled rice of selected countries in ASEAN, 2022-2023	15
15	FOB price (US\$/Ton) of milled rice of selected countries in ASEAN, 2022-2023	16
16	CIF price (US\$/Ton) of milled rice of selected countries in ASEAN, 2022-2023	16
17	Maize production of selected countries in ASEAN, 2022-2024	28
18	Maize planted area of selected countries in ASEAN, 2022-2024	28
19	Maize harvested area of selected countries in ASEAN, 2022-2024	28
20	Maize yield of countries in ASEAN, 2022-2024	29
21	Amount of maize export (million tons) of selected countries in ASEAN, 2023-2024	29
22	Share of maize export (tons) among ASEAN countries, 2023	29
23	Share of maize export (tons) among ASEAN countries, 2024	29

List of Figures (Continued)

Figure		Page
24	Amount of maize import (million tons) by selected countries in ASEAN, 2023-2024	30
25	Share of maize import (tons) among ASEAN countries, 2023	30
26	Share of maize import (tons) among ASEAN countries, 2023	30
27	Amount of ending stock of maize in ASEAN countries, 2023-2024	31
28	Ratio of maize production to domestic utilization in ASEAN countries, 2022-2024	31
29	Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2022-2024	31
30	FOB price (US\$/Ton) of maize of selected countries in ASEAN, 2022-2023	32
31	CIF price (US\$/Ton) of maize of selected countries in ASEAN, 2022-2023	32
32	Sugarcane production of selected countries in ASEAN, 2022-2024	45
33	Sugarcane planted area of selected countries in ASEAN, 2022-2024	45
34	Sugarcane harvested area of selected countries in ASEAN, 2022-2024	45
35	Sugarcane yield of countries in ASEAN, 2022-2024	46
36	Amount of sugar export (million tons) of selected countries in ASEAN, 2023-2024	46
37	Share of sugar export (tons) among ASEAN countries, 2023	46
38	Share of sugar export (tons) among ASEAN countries, 2024	46
39	Amount of sugar import (million tons) by selected countries in ASEAN, 2023-2024	47
40	Share of sugar import (tons) among ASEAN countries, 2023	47
41	Share of sugar import (tons) among ASEAN countries, 2024	47
42	Amount of ending stock of sugar in ASEAN countries, 2023-2024	47
43	Ratio of sugar production to domestic utilization in ASEAN countries, 2022-2024	48
44	Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2022-2024	48
45	FOB price (US\$/Ton) of sugar of selected countries in ASEAN, 2022-2023	49
46	CIF price (US\$/Ton) of sugar of selected countries in ASEAN, 2022-2023	49

List of Figures (Continued)

Figure		Page
47	Soybean production of selected countries in ASEAN, 2022-2024	61
48	Soybean planted area of selected countries in ASEAN, 2022-2024	61
49	Soybean harvested area of selected countries in ASEAN, 2022-2024	61
50	Soybean yield of countries in ASEAN, 2022-2024	62
51	Amount of soybean export (million tons) of selected countries in ASEAN, 2023-2024	62
52	Share of soybean export (tons) among ASEAN countries, 2023	62
53	Share of soybean export (tons) among ASEAN countries, 2024	62
54	Amount of soybean import (million tons) by selected countries in ASEAN, 2023-2024	63
55	Share of soybean import (tons) among ASEAN countries, 2023	63
56	Share of soybean import (tons) among ASEAN countries, 2024	63
57	Amount of ending stock of soybean in ASEAN countries, 2023-2024	64
58	Ratio of soybean production to domestic utilization in ASEAN countries, 2022-2024	64
59	Ratio of soybean beginning stock to domestic utilization in ASEAN Countries, 2022-2024	64
60	FOB price (US\$/Ton) of soybean of selected countries in ASEAN, 2022-2023	65
61	CIF price (US\$/Ton) of soybean of selected countries in ASEAN, 2022-2023	65
62	Cassava production of selected countries in ASEAN, 2022-2022	77
63	Cassava planted area of selected countries in ASEAN, 2022-2024	77
64	Cassava harvested area of selected countries in ASEAN, 2022-2024	77
65	Cassava yield of countries in ASEAN, 2022-2024	78
66	Amount of cassava export (million tons) of selected countries in ASEAN, 2023-2024	78
67	Share of cassava export (tons) among ASEAN countries, 2023	78
68	Share of cassava export (tons) among ASEAN countries, 2024	78

List of Figures (Continued)

Figure		Page
69	Amount of cassava import (million tons) by selected countries in ASEAN, 2023-2024	79
70	Share of cassava import (tons) among ASEAN countries, 2023	79
71	Share of cassava import (tons) among ASEAN countries, 2024	79
72	Amount of ending stock of cassava in ASEAN countries, 2023-2024	79
73	Ratio of cassava production to domestic utilization in ASEAN countries, 2022-2024	80
74	Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2022-2024	80
75	FOB price (US\$/Ton) of cassava of Thailand in 2022-2023	81
76	CIF price (US\$/Ton) of cassava of selected countries in ASEAN, 2022-2023	81

Rice Outlook for 2024

Highlights

Rice supply in ASEAN is forecast to increase about 3.28 percent from 166.10 million tons of milled rice in 2023 to 171.55 million tons in 2024 (Table 1). The increase in supply is mostly due to the increase in stock and production carried over from the previous year.

The beginning stock is forecast to increase 14.07 percent or 4.21 million tons from 29.92 million tons in 2023 to 34.13 million tons in 2024.

The rice production in 2024 is forecast to be 130.07 million tons, increasing from 128.97 million tons in 2023, or 0.86 percent increase. The import is expected to increase 1.94 percent or 0.14 million tons from 7.21 million tons in 2023 to 7.35 million tons in 2024.

Considering only available data, rice export is expected to increase 15.59 percent from 18.03 million tons in 2023 to 20.84 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to be 112.31 percent in 2024. The beginning stock to domestic utilization ratio (food security ratio) is estimated to be 29.46 percent in 2024 (Table 1).

Table 1 Summary of the ASEAN rice situation, 2023-2024 (milled rice)

Unit: Million tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	166.10	171.55	5.45	3.28
Beginning stock	29.92	34.13	4.21	14.07
Production	128.97	130.07	1.10	0.86
Import	7.21	7.35	0.14	1.94
Demand (Million tons)	166.10	169.13	3.03	1.82
Domestic utilization	113.94	115.82	1.88	1.65
Export	18.03	20.84	2.81	15.59
Ending stock	34.13	34.89	0.76	2.23
Ratio of production to domestic utilization (%)	113.18	112.31	-0.87	-
Ratio of beginning stock to domestic utilization (%)	26.26	29.46	3.20	-

ASEAN Rice Situation in 2023

► *Production*

ASEAN paddy production in 2023 (crop year 2022/23) was estimated at 200.44 million tons, increasing 4.92 million tons or 2.52 percent from 195.51 million tons in 2022 (crop year 2021/22). The increase was due to the increasing in planted and harvested areas. The increase in production was found in Brunei, Cambodia, Indonesia, Lao PDR, Malaysia, Philippines, Thailand and Vietnam (Table 2-5, Figure 1-4).

For **Brunei**, the increase in production is attributed to the increase in planted and harvested areas. The increase in planted and harvested areas came from government policy, which is the expansion of new rice farming areas in Kandol. Besides, rice yield remained the same as previous year because farmers used more fertilizer, improved varieties, and took better care of the rice crop.

For **Cambodia**, the increase in production was due to change of yield. The increase in yield came from farmers' response to using more improved variety, taking care better and government intervention.

For **Indonesia**, the increase in production is attributed to the increase in planted yield due to favorable weather, using more improved variety, using more fertilizer and taking care better.

For **Lao PDR**, the increase in production is attributed to the increase in yield. The increase in yield came from using more improved variety together with better taking care of the crops by farmers.

For **Malaysia**, the increase in production is attributed to the increase in planted area and harvested area. The increase came from government policy and using more improved variety together with better taking care of the crops by farmers.

For **Myanmar**, the decrease in production is attributed to the decrease in harvested area. The decrease in harvested area

came from flood and unfavorable weather condition. The increase in yield was because farmers took better care of the rice crop together with using more improved variety.

For **the Philippines**, the increase in production came from the increase in planted area, harvested area, and yield because government policy and took better care of the rice crop together with favorable weather and sufficient irrigation and water supply in Central Visayas.

For **Thailand**, the increase in production came from the increase in planted area, harvested area, and yield was due to favorable weather together with sufficient irrigation and water supply.

For **Vietnam**, the increase in production is attributed to the increase in planted area, harvested area, and yield, which was caused by farmers respond to price increase and favorable weather.

► *Utilization and Stock*

The domestic utilization of rice (milled rice) within ASEAN in 2023 (calendar year) was estimated to be 113.94 million tons, which decreased from 114.33 million tons in 2022. The decrease was about 0.39 million tons or 0.34 percent (Table 7-8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2023 was estimated at 113.18 percent compared to 109.94 percent in 2022. This indicated that rice production in ASEAN in year 2022, aggregately, is sufficient for rice demand in ASEAN. The increase in the self-sufficient ratio of production to domestic utilization occurred in Brunei, Indonesia, Malaysia, the Philippines, Thailand, and Vietnam. While the self-sufficient ratio of Cambodia, Lao PDR, and Myanmar decreased.

However, on the country-by-country basis, some countries in the region still need to import rice for their domestic consumption. The highest ratio was found in Thailand, Vietnam, and Cambodia respectively, while the lowest ratio was in Brunei (Table 10, Figure 12).

The beginning stock in 2023 (January 2023) of ASEAN was estimated at 29.92 million tons, increasing 1.09 million tons from 28.83 million tons in 2022 or 3.7 percent. Myanmar carried 12.83 million tons or 42.58 percent of the ASEAN stock, followed by Thailand with 4.58 million tons or 15.3 percent of the total stock in ASEAN (Table 7-8).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in 2023 for the whole ASEAN was estimated at 26.26 percent, which increased about 1.04 percent from the previous year. Brunei, Cambodia, Myanmar, and Thailand have the ratios above 30 percent of the optimum level (Table 11, Figure 13).

For the overall production, the data from major crop namely rice, the staple food of ASEAN region, demonstrates that many countries in the region *have self-dependency in terms of food production and have food security*. However, they still have to deal with the problem of high food prices which is one of the determinants that cause food insecurity. As most of the producing countries in ASEAN are developing countries, the majority of populations in the countries have low-income and middle-income which will affect the most from high food prices crisis. This might raise the concerns of food insecurity in the future. On the other hand, this situation can be advantages for rice export of ASEAN countries, especially for countries that have excessive supply for generating income from export.

► **Trade**

In 2023, ASEAN as a whole exported 18.03 million tons of milled rice, which increased of 0.99 million tons or 5.86 percent from 17.03 million tons exported in 2022. Vietnam and Thailand, the two major exporting countries, exported about 7.91 million tons and 7.70 million tons, respectively (Table 7-8, Figure 5-6).

The total import by ASEAN in 2023 is estimated to be 7.21 million tons, an increase of 0.46 million tons or about 6.81 percent from 6.75 million tons in 2022. The Philippines was the biggest importer in the region, which imported 3.82 million tons of milled rice (Table 7-8, Figure 8-9).

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

► **Prices**

Monthly FOB prices of rice export and CIF prices for rice import in selected countries in ASEAN during 2022-2023 (January-December) is shown in Table 14-15 and Figure 14-16.

► **Damaged Area**

The damaged area of paddy in ASEAN in 2023 (crop year 2022/23) was estimated to be 0.51 million hectares. Of which, 0.50 million hectares or 98.72 percent were caused by flood. The damage caused by flood occurred mostly in Thailand, which equals to 97.56 million hectares or 0.49 percent of the whole ASEAN. The damage was also caused by many factors such as drought, pests, and diseases (Table 6).

Prospects for Rice in 2024

► Production

ASEAN paddy production in 2024 (crop year 2023/24) is estimated at 202.34 million tons, increasing by 1.09 million tons, which is 0.95 percent from 200 million tons in 2023 (crop year 2022/23) by assuring without extreme natural disasters. The production is predicted to increase in all countries, except Malaysia and Thailand, which are caused by the increase in either harvested area and yield (Table 2-5, Figure 1-4).

► Utilization and Stock

The domestic utilization of milled rice in ASEAN in 2024 is projected to be 115.82 million tons, increasing about 1.87 million tons or 1.65 percent compared to 113.94 million tons in 2023 (Table 8-9).

The beginning stock in 2024 is predicted to be 34.13 million tons, which increased by 4.20 million tons or 14.05 percent from 29.92 million tons in 2023. The ending stock is also expected to increase by 0.77 million tons or 2.24 percent from 34.13 million tons in 2023 to 34.89 million tons in 2024 (Table 8-9, Figure 11).

The ratio of production to domestic utilization (**self-sufficient ratio**) is forecast to be 112.31 percent in 2024, which will decrease by 0.87 percent from 2023. This indicates that rice production in ASEAN is still enough for consumption within the region (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in ASEAN in 2024 is forecast to increase from 26.26 percent in 2023 to 29.46 percent in 2024 (Table 11, Figure 13).

► Trade

With missing data from some countries, rice import from ASEAN is forecast to increase from 7.21 million tons in 2023 to 7.35 million tons in 2024 (Table 8-9, Figure 8 and 10).

For the export, the whole ASEAN is forecast to export 20.84 million tons in 2024, increasing of 2.81 million tons or about 15.60 percent compared to 18.03 million tons in 2023 (Table 8-9, Figure 5 and 7).

Table 2 Paddy production in ASEAN countries, 2022 - 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	195,511.77	200,435.35	4,923.58	2.52	202,336.68	1,901.32	0.95
Brunei	3.56	4.35	0.79	22.07	4.66	0.31	7.04
Cambodia	11,623.87	11,971.39	347.52	2.99	12,342.73	371.35	3.10
Indonesia	54,748.98	56,944.05	2,195.07	4.01	56,961.80	17.75	0.03
Lao PDR	3,781.58	4,008.75	227.17	6.01	4,085.00	76.25	1.90
Malaysia	2,364.45	2,430.03	65.57	2.77	2,394.46	-35.56	-1.46
Myanmar	27,446.01	26,729.39	-716.62	-2.61	28,496.79	1,767.40	6.61
Philippines	19,903.98	20,106.14	202.16	1.02	20,583.15	477.01	2.37
Singapore	N/A						
Thailand	32,977.78	34,353.88	1,376.11	4.17	32,354.34	-1,999.55	-5.82
Vietnam	42,661.56	43,887.38	1,225.82	2.87	45,113.75	1,226.36	2.79

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

Table 3 Paddy planted area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	46,026.48	46,854.71	828.23	1.80	46,785.22	-69.48	-0.15
Brunei	1.59	1.64	0.05	3.00	1.69	0.05	3.00
Cambodia	3,403.16	3,357.26	-45.91	-1.35	3,397.34	40.08	1.19
Indonesia	10,466.88	10,822.50	355.62	3.40	10,791.09	-31.41	-0.29
Lao PDR	959.40	919.98	-39.42	-4.11	939.10	19.12	2.08
Malaysia	638.42	645.56	7.14	1.12	644.97	-0.59	-0.09
Myanmar	7,053.36	7,094.92	41.57	0.59	7,115.21	20.28	0.29
Philippines	4,801.98	4,806.38	4.40	0.09	4,906.84	100.45	2.09
Singapore	N/A						
Thailand	11,609.60	11,978.37	368.77	3.18	11,624.87	-353.50	-2.95
Vietnam	7,092.08	7,228.10	136.02	1.92	7,364.12	136.02	1.88

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 4 Paddy harvested area in ASEAN countries, 2022 – 2024**

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	45,422.59	46,079.39	656.79	1.45	46,317.41	238.02	0.52
Brunei	1.48	1.53	0.04	3.00	1.58	0.05	3.00
Cambodia	3,302.68	3,343.27	40.60	1.23	3,386.25	42.98	1.29
Indonesia	10,452.67	10,822.50	369.83	3.54	10,791.09	-31.41	-0.29
Lao PDR	957.63	919.98	-37.65	-3.93	939.10	19.12	2.08
Malaysia	636.45	645.56	9.11	1.43	644.97	-0.59	-0.09
Myanmar	7,043.32	6,829.16	-214.16	-3.04	7,110.83	281.67	4.12
Philippines	4,801.98	4,806.38	4.40	0.09	4,906.84	100.45	2.09
Singapore	N/A						
Thailand	11,164.66	11,482.91	318.25	2.85	11,172.63	-310.28	-2.70
Vietnam	7,061.73	7,228.10	166.37	2.36	7,364.12	136.02	1.88

Remark: * The value is estimated by AFSIS Secretariat, ** Vietnam reported only planted area. N/A refers to data that is not available.**Table 5 Paddy yield in ASEAN countries, 2022 – 2024**

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	4.30	4.35	0.05	1.16	4.37	0.02	0.46
Brunei	2.40	2.84	0.44	18.33	2.95	0.11	3.87
Cambodia	3.52	3.58	0.06	1.70	3.64	0.06	1.68
Indonesia	5.24	5.26	0.02	0.38	5.28	0.02	0.38
Lao PDR	3.95	4.36	0.41	10.38	4.35	-0.01	-0.23
Malaysia	3.72	3.76	0.04	1.08	3.71	-0.05	-1.33
Myanmar	3.90	3.91	0.01	0.26	4.01	0.10	2.56
Philippines	4.14	4.18	0.04	0.97	4.19	0.01	0.24
Singapore	N/A						
Thailand	2.95	2.99	0.04	1.36	2.90	-0.09	-3.01
Vietnam	6.04	6.07	0.03	0.50	6.13	0.06	0.99

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

Table 6 Paddy damaged area in ASEAN by cause of damage, 2023

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	502,278	4,787	28	29	1,620	0	508,742
Brunei	25	28	28	30	-	-	111
Cambodia	9,225	4,760	-	-	-	-	13,985
Indonesia	N/A						
Lao PDR	N/A						
Malaysia	N/A						
Myanmar	2,962	-	-	-	1,620	-	4,582
Philippines	N/A						
Singapore	N/A						
Thailand	490,066			-	-	-	490,066
Vietnam	N/A						

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

Table 7 Rice balance sheet of ASEAN countries, 2022 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	28,834,683	125,696,882	6,749,201	161,280,766	114,329,405	17,029,440	29,921,920	161,280,766
Brunei	17,910	2,316	25,199	45,425	27,627	-	17,798	45,425
Cambodia	1,646,059	7,439,278	-	9,085,337	5,529,409	637,004	2,918,924	9,085,337
Indonesia	5,272,537	35,050,295	64,895	40,387,727	36,320,696	2,793	4,064,238	40,387,727
Lao PDR	148,155	2,268,948	23,305	2,440,408	1,952,326	45,638	442,444	2,440,408
Malaysia	-	1,513,250	1,230,879	2,744,129	*2,630,108	114,021	0	2,744,129
Myanmar	11,233,262	17,336,547	160	28,569,969	15,237,732	499,968	12,832,269	28,569,969
Philippines	1,859,448	12,920,681	3,820,000	18,600,128	16,670,261	-	*1,929,867	18,600,128
Singapore	-	-	369,666	369,666	238,427	131,238	-	369,666
Thailand	*5,516,239	*21,435,554	6,663	26,958,456	14,684,439	7,693,546	4,580,470	26,958,456
Vietnam	3,141,073	27,730,014	1,208,434	32,079,521	21,038,379	7,905,232	3,135,910	32,079,521

Remark: * The value is estimated by AFSIS Secretariat.

Table 8 Rice balance sheet of ASEAN countries, 2023 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	29,921,920	128,965,972	7,208,563	166,096,454	113,943,485	18,027,912	34,125,058	166,096,455
Brunei	17,798	2,827	28,833	49,458	31,430	-	18,028	49,458
Cambodia	2,918,924	7,661,688		10,580,612	6,240,320	278,184	4,062,108	10,580,612
Indonesia	4,064,238	36,455,578	561,657	41,081,472	35,252,730	1,964	5,826,778	41,081,472
Lao PDR	442,444	2,405,250	18,754	2,866,448	2,293,158	6,454	566,836	2,866,448
Malaysia	-	1,555,216	1,119,889	2,675,105	*2,539,282	*135,824	-	2,675,106
Myanmar	*12,832,269	16,871,591	-	29,703,860	15,651,940	724,669	*13,327,250	29,703,860
Philippines	1,929,867	13,157,000	3,820,000	18,906,867	16,811,293	0.65	2,095,573	18,906,867
Singapore	-	-	439,787	439,787	283,500	156,288	-	439,787
Thailand	4,580,470	*22,330,025	*10,000	26,920,495	13,602,140	*8,200,000	5,118,355	26,920,495
Vietnam	3,135,910	28,526,798	1,209,642	32,872,351	21,237,692	8,524,528	3,110,130	32,872,351

Remark: * The value is estimated by AFSIS Secretariat.

Table 9 Rice balance sheet of ASEAN countries, 2024 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	34,125,058	130,073,282	7,349,703	171,548,043	115,817,864	20,839,677	34,890,501	171,548,043
Brunei	18,028	3,057	29,698	50,783	32,518		18,264	50,783
Cambodia	4,062,108	7,899,350		11,961,457	6,182,186	2,669,116	*3,110,155	11,961,457
Indonesia	5,826,778	36,466,944	561,657	42,855,378	36,373,521	1,964	6,479,893	42,855,378
Lao PDR	566,836	2,451,000		3,017,836	2,414,268	-	5,432,104	7,846,372
Malaysia		1,532,457	*1,135,188	2,667,645	*2,517,645	*150,000		2,667,645
Myanmar	13,327,250	17,987,173		31,314,423	15,694,546	731,010	*14,888,867	31,314,423
Philippines	*2,095,573	*13,379,046	*4,000,000	19,474,620	16,953,519		2,521,101	19,474,620
Singapore			404,726	404,726	260,963	143,763		404,726
Thailand	5,118,355	*21,030,320	*10,000	26,158,675	13,952,366	*8,000,000	4,206,310	26,158,675
Vietnam	3,110,130	29,323,935	1,208,434	33,642,500	21,436,332	9,143,824	3,062,344	33,642,500

Remark: * The value is estimated by AFSIS Secretariat.

Table 10 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	125,696,882	114,329,405	109.94	128,965,972	113,943,485	113.18	130,073,282	115,817,864	112.31
Brunei	2,316	27,627	8.38	2,827	31,430	8.99	3,057	32,518	9.40
Cambodia	7,439,278	5,529,409	134.54	7,661,688	6,240,320	122.78	7,899,350	6,182,186	127.78
Indonesia	35,050,295	36,320,696	96.50	36,455,578	35,252,730	103.41	36,466,944	36,373,521	100.26
Lao PDR	2,268,948	1,952,326	116.22	2,405,250	2,293,158	104.89	2,451,000	2,414,268	101.52
Malaysia	1,513,250	2,630,108	57.54	1,555,216	2,539,282	61.25	1,532,457	2,517,645	60.87
Myanmar	17,336,547	15,237,732	113.77	16,871,591	15,651,940	107.79	17,987,173	15,694,546	114.61
Philippines	12,920,681	16,670,261	77.51	13,157,000	16,811,293	78.26	13,379,046	16,953,519	78.92
Singapore	0	238,427	0.00	0	283,500	0.00	0	260,963	0.00
Thailand	21,435,554	14,684,439	145.97	22,330,025	13,602,140	164.17	21,030,320	13,952,366	150.73
Vietnam	27,730,014	21,038,379	131.81	28,526,798	21,237,692	134.32	29,323,935	21,436,332	136.80

181 **Table 11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2022– 2024**

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	28,834,683	114,329,405	25.22	29,921,920	113,943,485	26.26	34,125,058	115,817,864	29.46
Brunei	17,910	27,627	64.83	17,798	31,430	56.63	18,028	32,518	55.44
Cambodia	1,646,059	5,529,409	29.77	2,918,924	6,240,320	46.78	4,062,108	6,182,186	65.71
Indonesia	5,272,537	36,320,696	14.52	4,064,238	35,252,730	11.53	5,826,778	36,373,521	16.02
Lao PDR	148,155	1,952,326	7.59	442,444	2,293,158	19.29	566,836	2,414,268	23.48
Malaysia	0	2,630,108	0.00	0	2,539,282	0.00	0	2,517,645	0.00
Myanmar	11,233,262	15,237,732	73.72	12,832,269	15,651,940	81.99	13,327,250	15,694,546	84.92
Philippines	1,859,448	16,670,261	11.15	1,929,867	16,811,293	11.48	2,095,573	16,953,519	12.36
Singapore	0	238,427	0.00	0	283,500	0.00	0	260,963	0.00
Thailand	5,516,239	14,684,439	37.57	4,580,470	13,602,140	33.67	5,118,355	13,952,366	36.68
Vietnam	3,141,073	21,038,379	14.93	3,135,910	21,237,692	14.77	3,110,130	21,436,332	14.51

Table 12 Quantity and Value of Rice Export by Countries of Destination in 2023

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia									3.72	2,424				
Indonesia	N/A													
Lao PDR	2.98	82,115			45,249	70,966,134								
Malaysia					4,800	1,896,000			25,450	10,867,000			106,296	42,812,000
Myanmar	N/A													
Philippines									3.72	2,424				
Singapore	N/A													
Thailand	378	315,989	323	127,462	269,982	120,999,056	10,495	4,214,441	19,910	9,444,249	447	186,619	24,145	10,144,318
Vietnam					306,496	149,072,936			160,228	77,496,879			1,287,003	647,541,024

[6]

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei							0	0			0	0
Cambodia							0	0			0	0
Indonesia	0.0010	1.0000					4	2,425	41.65	35,904	45	38,329
Lao PDR					3,073	1,033,107	3,073	1,033,107	3,380	2,092,303	6,453	3,125,410
Malaysia	22.6	82,115					45,275	71,130,364			45,275	71,130,364
Myanmar	380	183,000			468	181,000	137,394	55,939,000	587,275	241,239,000	724,669	297,178,000
Philippines							0	0	0.65	1,024	1	1,024
Singapore	N/A											
Thailand	20,931	19,195,375			2,915	1,632,877	349,526	166,260,385	1,714,401	938,233,334	2,063,927	1,104,493,719
Vietnam	34,762	19,762,929					1,788,489	893,873,768	1,166,372	661,401,134	2,954,861	1,555,274,902

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

Table 13 Quantity and Value of Rice Import by Countries of Origin in 2023

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									0.44	301	4,789	2,298,720		
Lao PDR											2,830	313,465		
Malaysia			13,640	9,945,364	13.67	24,179					17,800	7,509,025		
Myanmar	N/A													
Philippines											57,039	17,267,017		
Singapore			6,894	4,751,799					93	99,759	3,985	1,778,473		
Thailand	N/A													
Vietnam				240,484,336					2,596,508			130,675		

[10]

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.040	262	248,415	124,515,731	171,897	86,633,369	425,102	213,448,383	22,511.06	11,351,284	447,613	224,799,667
Lao PDR			11,988	919,787	3,925	983,475	18,743	2,216,727	11	5,350	18,754	2,222,077
Malaysia			24,810	12,954,118	122,660	61,781,060	178,923	92,213,746	161,041	88,335,706	339,963	180,549,452
Myanmar							0	0			0	0
Philippines			31,124	10,506,069	728,086	268,218,608	816,249	295,991,694	11,576,541	3,936,178	12,392,790	299,927,872
Singapore			96,129	88,897,151	112,527	65,533,983	219,629	161,061,164	220,158	128,162,309	439,787	289,223,473
Thailand	0.001	5			22	17,463	22	17,469	1,253	1,536,474	1,275	1,553,942
Vietnam		134,747		1,904,898			-	245,251,164		89,079,914	-	334,331,078

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

Table 14 FOB Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	MLYS ANGKOR	2022	1,391	1,390	1,389	1,347	1,380	1,200	1,280	1,300	1,360	1,400	1,390	1,380	1,351
	Standard 5% broken	2023	1,375	1,380	1,400	1,380	1,380								1,383
	Organic Parboiled Rice	2022	1,100	1,200	1,375	1,347	1,180	1,200	1,050	1,200	1,200	1,180	1,170	1,200	1,200
	Standard 5% broken	2023	1,170	1,170	1,170	1,170									1,170
Indonesia	Glutinous Rice	2022	941	590	0	0	816	0	1,147	1,804	657	650	3,661	2,804	1,452
		2023	4,632	1,469	650										2,250
Lao PDR	Mix_Milled rice quality 1 and 2	2022	341	367	362	369	383	378	349	367	367	362	366	378	366
		2023	456	525	542										508
Malaysia	Not specified	2022	400	413	377	382	413	410	399	370	357	384	395	355	388
		2023	350	351	346	352									350
Myanmar	Milled Rice 25%	2022	327	361	392	311	368	362	386	392	397	394	383	396	372
		2023	416	424	427	455									431
Thailand	Milled Rice 5%	2022	427	425	422	431	464	439	418	431	439	430	444	467	436
		2023	517	482	478	501	510								497
	Hommali Rice	2022	727	778	780	831	939	894	852	870	879	886	875	840	846
		2023	878	842	830	845	862								851
Vietnam	Milled Rice 5%	2022	486	476	495	497	489	488	490	473	472	478	493	507	487
		2023	519	535	529	523									527

Table 15 CIF Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022	2,964	30,000	0	546	505	603	2,231	2,245	2,207	2,347	2,124	1,550	4,302
		2023	2,072	510	1,641										1,408
Malaysia	Not specified	2022	460	446	418	488	459	477	529	497	487	509	545	537	488
		2023	544	576	542	506									542
Lao PDR	Hommali Rice	2022	361	413	431	327	514	467	412	368	366	361	361	366	396
		2023	106	130	117										118
Singapore	Not specified	2022	689	701	650	612	695	718	684	658	682	687	702	659	678
		2023	617	636	711	707	635	661	661	661	661	661	661	661	661

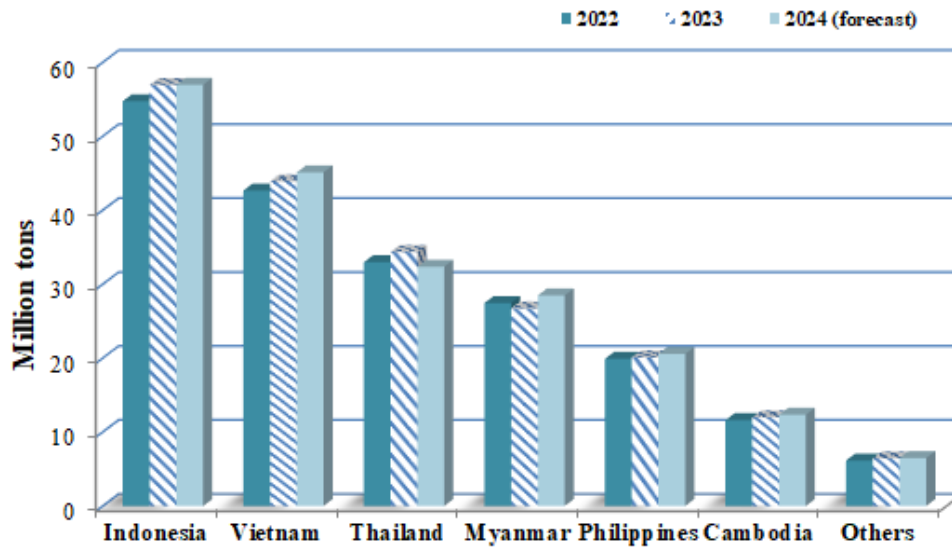


Figure 1 Paddy production of selected countries in ASEAN, 2022 – 2024

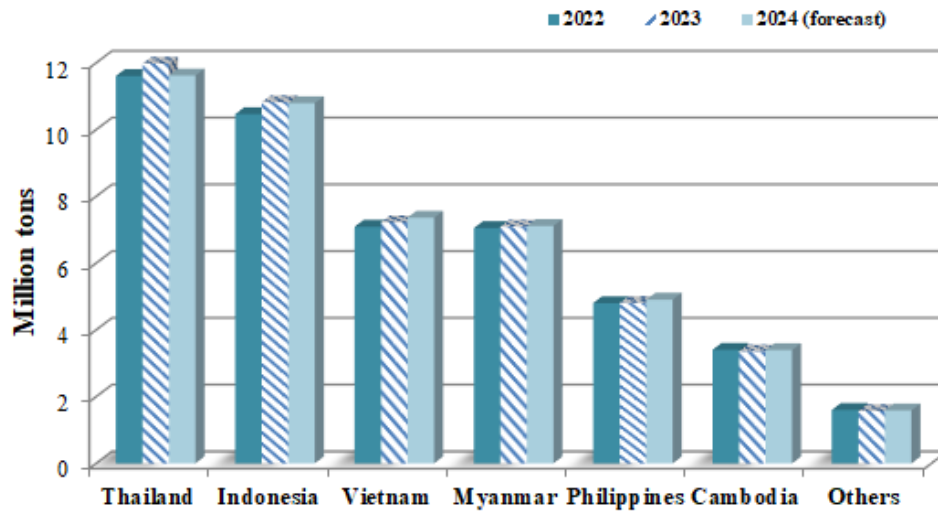


Figure 2 Paddy planted area of selected countries in ASEAN, 2022 – 2024

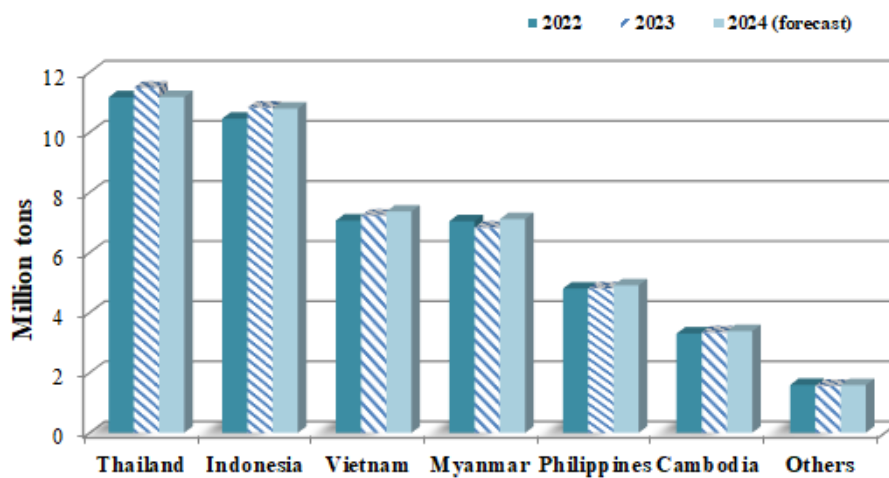


Figure 3 Paddy harvested area of selected countries in ASEAN, 2022 – 2024

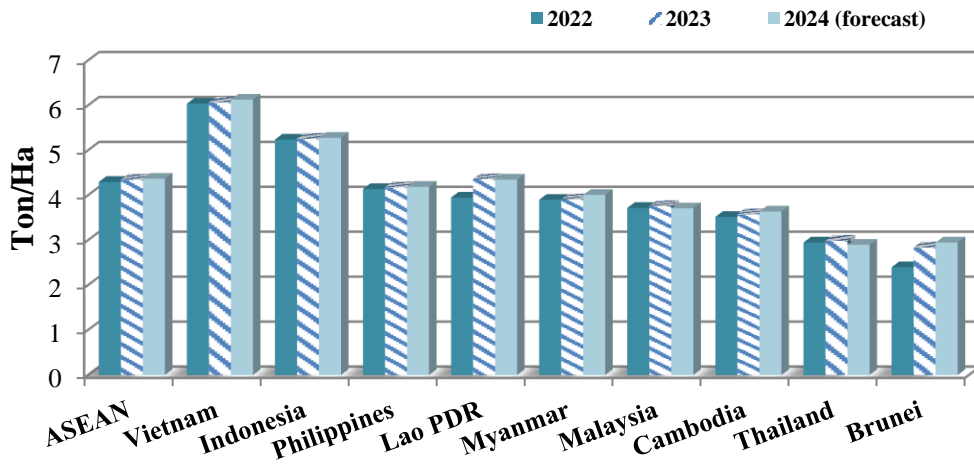


Figure 4 Paddy yield of countries in ASEAN, 2022 – 2024

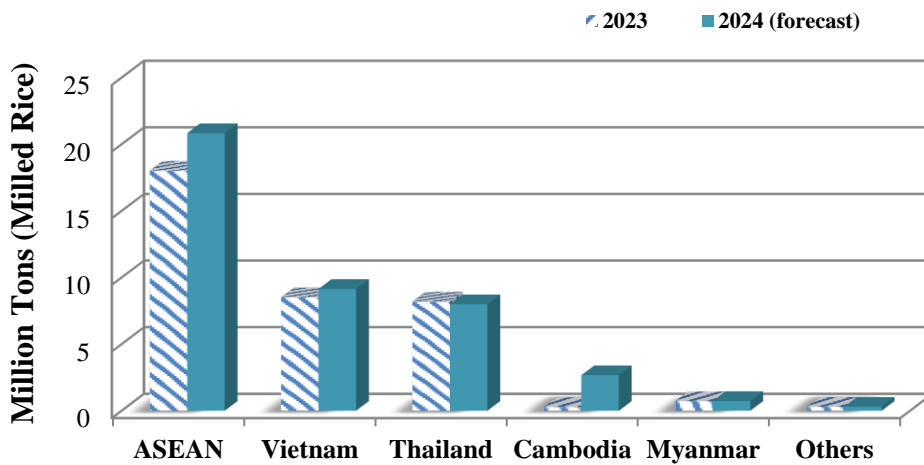
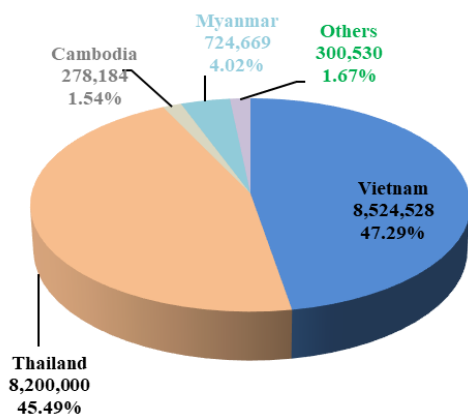
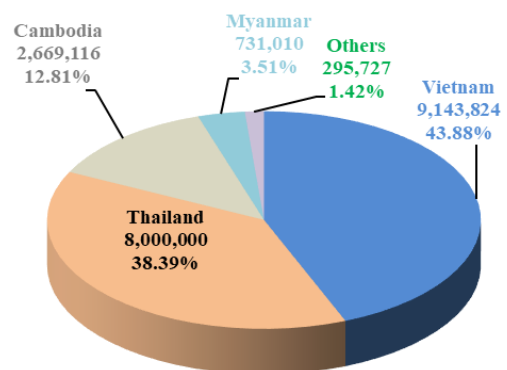


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 18.03 million tons

Figure 6 Share of rice export (tons) among ASEAN countries, 2023



Total 20.84 million tons

Figure 7 Share of rice export (tons) among ASEAN countries, 2024

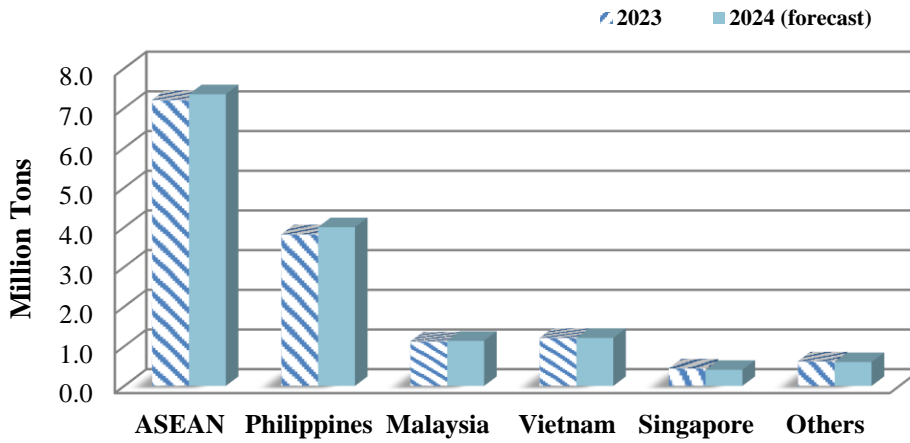
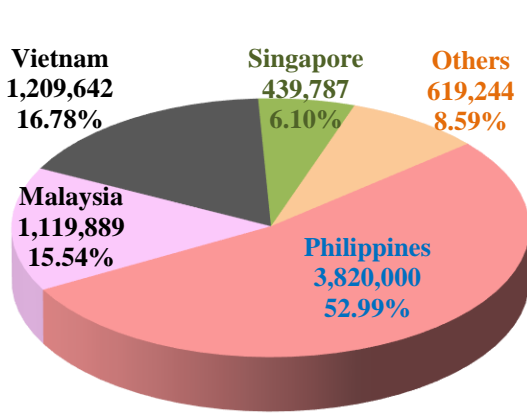
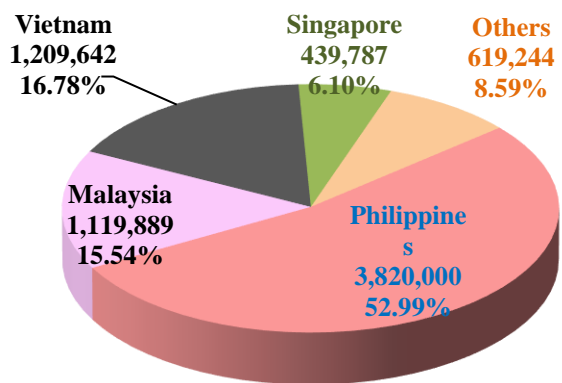


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 7.21 million tons

Figure 9 Share of rice import (tons) among ASEAN countries, 2023



Total 7.35 million tons

Figure 10 Share of rice import (tons) among ASEAN countries, 2024

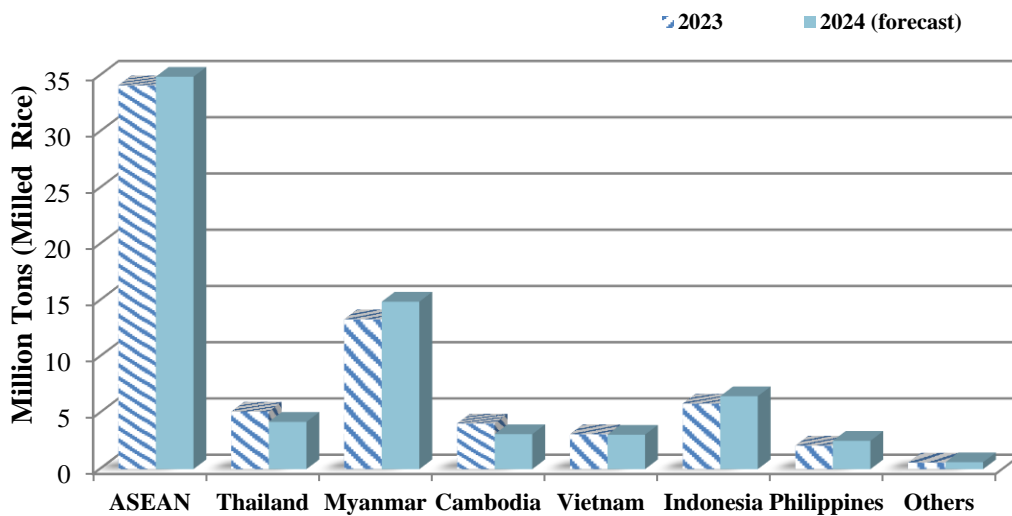


Figure 11 Amount of ending stock of rice in ASEAN countries, 2023 – 2024

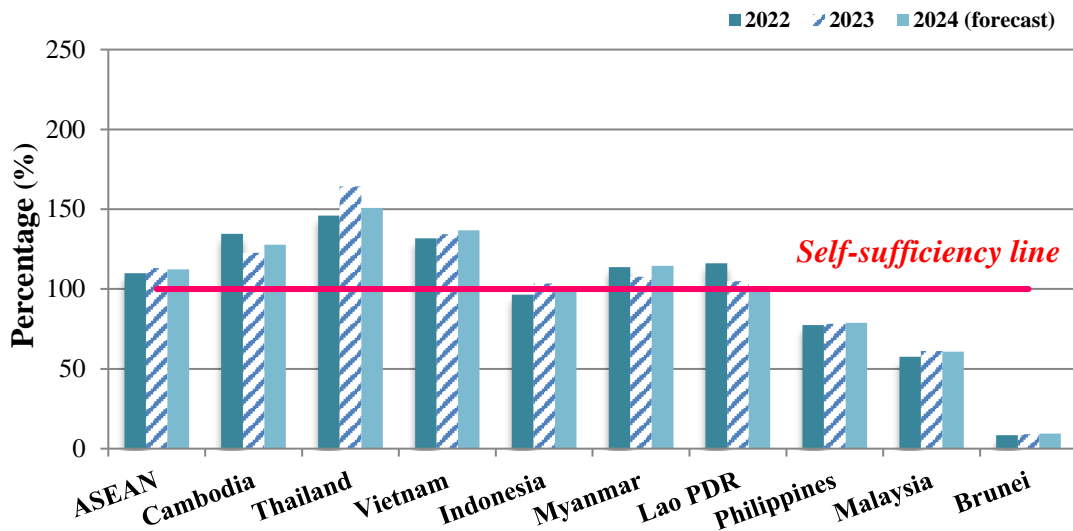


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2022– 2024

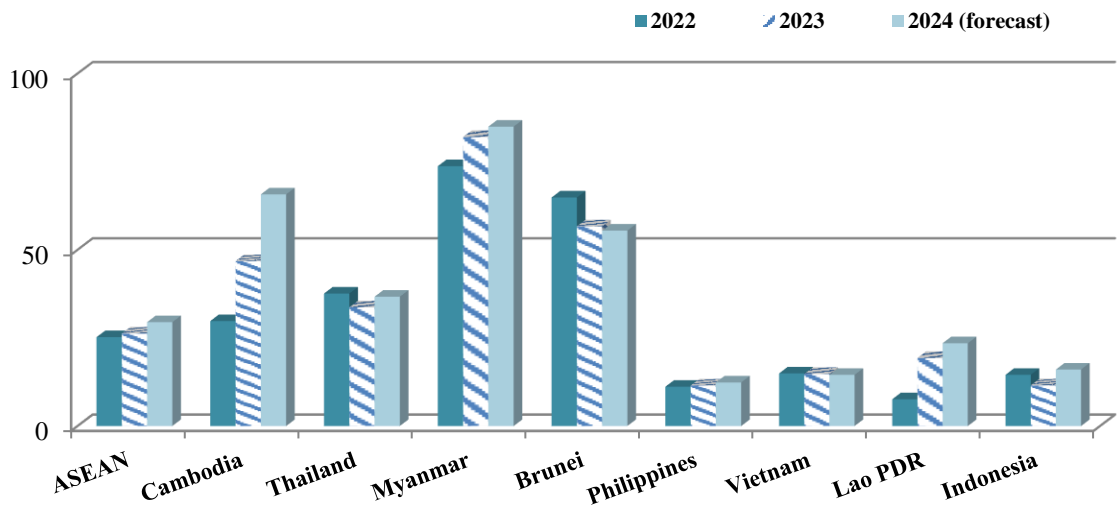


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

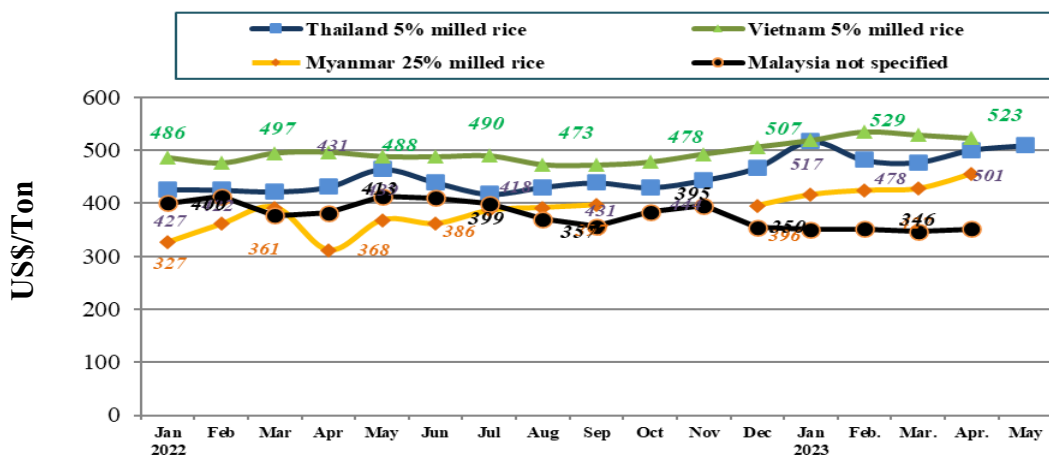


Figure 14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

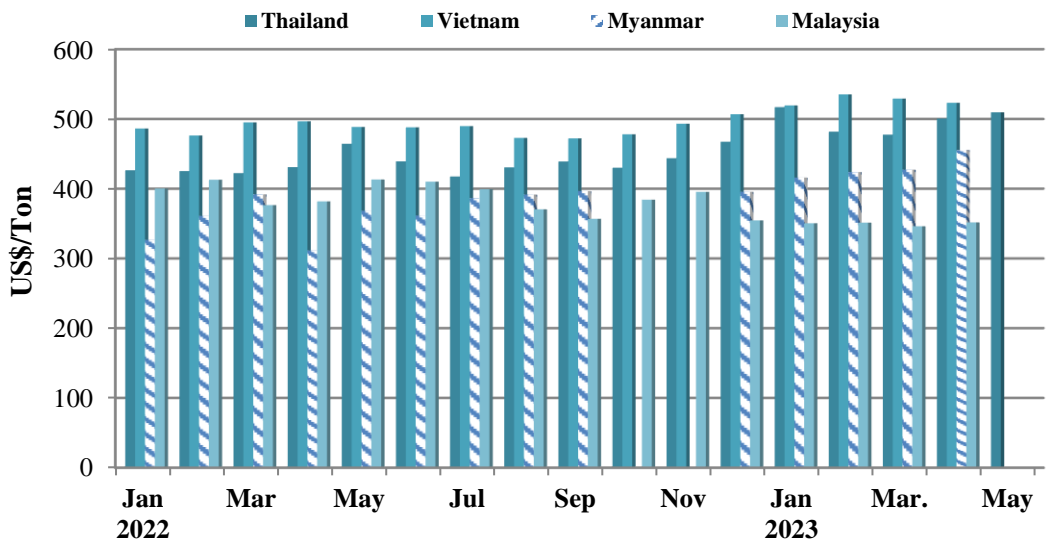


Figure 15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

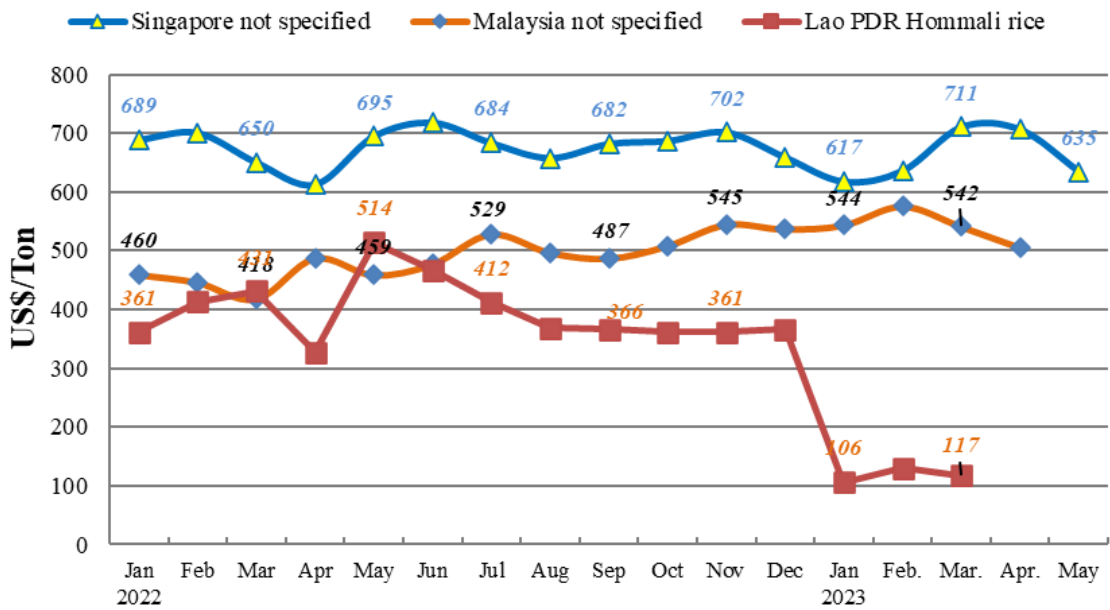


Figure 16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

Maize Outlook for 2024



The increase in the stock and production are the main reasons for increasing in the ASEAN maize supply. The increasing supply is expected to be 1.31 percent or 0.84 million tons from 63.91 million tons in 2023 to 64.75 million tons in 2024 (Table 16).

Maize production is forecast to increase around 0.44 million tons or 1.11 percent from 39.68 million tons in 2023 to 40.12 million tons in 2024. The beginning stock is expected to increase around 10.25 percent or 0.81 million tons from 7.90 million tons in 2023 to 8.71 million tons in 2024.

Maize's demand in 2024 is expected to increase around 1.31 percent. Domestic utilization is predicted to increase by 0.73 million tons from 53.70 million tons in 2023 to 54.43 million tons in 2024. The export of maize is expected to increase around 6.71 percent from 1.49 million tons in 2023 to 1.59 million tons in 2024.

The ending stock of maize is expected to slight increase around 0.23 percent from 8.71 million tons in 2023 to 8.73 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to decrease by 0.19 percent from 73.90 percent in 2023 to 73.71 percent in 2024.

The beginning stock to domestic utilization ratio (food security ratio) in 2024 is forecast to increase around 1.29 percent from 14.72 percent in 2023 to 16.01 percent in 2024. **This indicates that the food (feed) security situation in the ASEAN region is increasing.**

Table 16 Summary of the ASEAN maize situation, 2023 – 2024

Unit: Million tons

Items	2022	2023	Change	
			Quantity	%
Supply (Million tons)	63.91	64.75	0.84	1.31
Beginning stock	7.90	8.71	0.81	10.25
Production	39.68	40.12	0.44	1.11
Import	16.32	15.92	-0.40	-2.45
Demand (Million tons)	63.91	64.75	0.84	1.31
Domestic utilization	53.70	54.43	0.73	1.36
Export	1.49	1.59	0.10	6.71
Ending stock	8.71	8.73	0.02	0.23
Ratio of production to domestic utilization (%)	73.90	73.71	-0.19	-
Ratio of beginning stock to domestic utilization (%)	14.72	16.01	1.29	-

ASEAN Maize Situation in 2023

► *Production*

ASEAN maize production in 2023 (crop year 2022/23) was estimated at 45.94 million tons, which increased by 1.27 million tons or about 2.86 percent from 44.66 million tons in 2022 (crop year 2021/22). An increase in maize production in 2023 was found in Cambodia, Indonesia, Lao PDR, Myanmar, the Philippines, and Vietnam due to the increase in either planted area and yield. While, the production of Thailand decreased due to the declining of planted area and harvested area (Table 17-20, Figure 17-20).

For **Cambodia**, the increase in production is attributed to the increase in yield, planted and harvested areas.

For **Indonesia**, the increase in production is attributed to the increase in yield, planted and harvested areas, which came from farmers' response to price increases, favorable weather, and government policies together with special assistants.

For **Lao PDR**, the increase in production is attributed to the increase in planted area, harvested area because farmers' response to price increases, together with government policies.

For **Myanmar**, the increase in production is attributed to the increase in yield, which was caused by improved varieties and farmers' taking care better.

For **the Philippines**, the increase in production is attributed to the increase in yield because favorable weather (sufficient rainfall).

For **Thailand**, the decrease in production is attributed to the decrease in the planted area, harvested area, and yield. caused by unfavorable weather.

For **Vietnam**, the increase in production is attributed to the increase in the planted area, harvested area, and yield

because favorable weather, and government policies.

► *Utilization and Stock*

Maize utilization in ASEAN in 2023 was estimated at 53.70 million tons, which increased 3.92 million tons or 7.88 percent compared to 49.78 million tons in 2022 (Table 22-23). Most of the maize production in ASEAN is used for animal feed. The increase in domestic utilization of maize has occurred in whole ASEAN except Singapore.

The beginning stock of maize in ASEAN in 2023 was estimated at 7.90 million tons, which increased by 3.40 million tons from 4.50 million tons in 2022 (Table 22-23).

The ratio of maize production to domestic utilization (**self-sufficient ratio**) for the whole ASEAN in 2023 was estimated at 73.90 percent compared to 77.26 percent in year 2022. This indicated that the ASEAN itself produced inadequate maize for the regional consumption (Table 25, Figure 28). On the country basis, Cambodia, Lao PDR, and Myanmar have the ratio above 100 percent. While Indonesia, the Philippines, Malaysia, Thailand and Vietnam have the ratio less than 100 percent. Thus, these countries still need to import maize for their domestic utilization.

The ratio of beginning stock to domestic utilization (**food security ratio**) for the ASEAN in 2023 was estimated to be 14.72 percent and all of country have the ratio less than 10 percent. This indicated that the region is not secure enough in terms of feed requirement (Table 26, Figure 29).

Overall, despite maize production in ASEAN was increased, the production volume was considerably insufficient for consumption within the ASEAN region because maize is the important raw material for animal feed industry. Therefore, many ASEAN countries still rely heavily on maize import from abroad.

The impact from Russia-Ukraine war has led to the increasing prices of fertilizer, especially maize as these two countries are the major maize producers and exporters in the world. This situation has direct impact to most countries in ASEAN region because they are agricultural producing countries, main income of population in the country comes from agricultural activities. When the energy price is high, agricultural equipment will be more expensive and fertilizer will also be costly and shortage resulting in the increase of production costs suddenly. This will affect Maize producing countries in ASEAN region and could possibly lead to maize shortage or food insecurity in the future.

► **Trade**

The maize exported from ASEAN in 2023 is forecast to be 1.49 million tons compared to 16.32 million tons of maize imported (Table 23, Figure 21-22, 24-25). In 2023, Myanmar, the biggest exporter in ASEAN, is expected to export 1.08 million tons or around 72.11 percent of the total

maize exported from the ASEAN (Table 23, Figure 21-22).

The major importing countries in the region are Vietnam, Thailand, Malaysia, Indonesia, the Philippines and Singapore (Table 23, Figure 24-25). The quantity and value of maize exported by countries of destination and the quantity and value of imported by countries of origin are given in Table 27-28.

► **Prices**

The monthly FOB prices for maize exporting countries and CIF prices for importing countries of 2022 and 2023 are shown in Table 29-30 and Figure 30-31. The annual average of Indonesia FOB prices in 2023 (January-March) was 932 US\$/ton, which increase from 919 US\$/ton as the yearly average in 2022. For Lao PDR (January-May), Myanmar (January-April), and Thailand (January-May), average FOB prices of 2023 were 177, 312, and 390 US\$/ton, respectively. The average CIF prices in 2023 in Indonesia (January-March), Singapore (January-December) and Vietnam (January-May) were 344, 1,282, and 334 respectively.

► **Damaged Area**

The damaged area of maize in 2023 is estimated to be 25,040 hectares, of which 6,210 hectares were caused by flood. The most affected areas were caused by flood, which occurred in Cambodia, and Myanmar while the damage area of Thailand was caused by drought (Table 21).

Prospects for Maize in 2024

► *Production*

Maize production in ASEAN in 2024 (crop year 2023/24) was estimated at 46.69 million tons. The increase has occurred in Malaysia, Indonesia, Lao PDR, Myanmar, the Philippines, Thailand, and Vietnam. The most increase in terms of quantity was found in Indonesia at approximately 24.82 million tons (Table 17).

For **Indonesia**, the biggest maize producer in ASEAN, the increase in production is attributed to the increase in planted area, harvested area, and yield, which comes from farmers' response to maize price increases, favorable weather together with special assistants.

For **Lao PDR**, the increase in production is attributed to the increase in planted area, harvested area, and yield, which caused by government policies and farmers' response to maize price increases.

For **Myanmar**, the increase in production is attributed to the increase in yield which caused by farmers' response to maize price increases and better taking care of the maize crops.

The Philippines, the maize production is forecast to increase due to the increasing in yield.

For **Thailand**, the increase in production is attributed to the increase in planted area and harvested area.

For **Vietnam**, the increase in production is attributed to the increase in

planted and harvested areas, which caused by farmers' response to maize price increases (Table 17-20, Figure 17-20).

► *Utilization and Stock*

The domestic utilization of maize in ASEAN is forecast to be 54.43 million tons in 2024, an increase of 0.73 million tons from 53.70 million tons in 2023 (Table 23-24). The estimate of the beginning stock for 2024 is around 8.71 million tons, an increase of 0.81 million tons from 7.90 million tons in 2023.

In 2024, the ratio of production to domestic utilization (**self-sufficient ratio**) is expected to be 73.71 percent, decreasing 0.19 percent from 93.90 percent in 2023 (Table 25, Figure 28). The ratio of beginning stock to domestic utilization ratio (**food security ratio**) in 2024 is expected to be 16.01 percent, which increases 1.29 percent from 2023 (Table 26, Figure 29).

► *Trade*

The maize export from ASEAN is projected to be 1.59 million tons in 2024, an increase of 0.09 million tons compared to 1.49 million tons in 2023. For the import by ASEAN, it is forecast to be 15.92 million tons in 2024, decreasing from 16.30 million tons in 2023 (Table 23-24, Figure 21, 23, 24, and 26).

Table 17 Maize production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022(2021/22)	2023(2022/23)	Change2023 over 2022		2024(2023/24)	Change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	44,661.55	45,936.85	1,275.30	2.86	46,690.95	754.10	1.64
Brunei	N/A						
Cambodia	792.50	1,227.60	435.10	54.90	800.88	-426.72	34.76
Indonesia	23,383.05	23,908.45	525.39	2.25	24,817.91	909.46	3.80
Lao PDR	462.81	642.60	179.79	38.85	656.10	13.50	2.10
Malaysia	60.00	80.00	20.00	33.33	100.00	20.00	25.00
Myanmar	2,311.35	2,341.12	29.77	1.29	2,360.01	18.89	0.81
Philippines	8,344.02	8,400.10	56.09	0.67	8,412.84	12.74	0.15
Singapore	N/A						
Thailand	4,895.73	4,782.98	-112.75	-2.30	4,941.22	158.23	3.31
Vietnam	4,412.09	4,554.00	141.91	3.22	4,602.00	48.00	1.05

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 18 Maize planted area in ASEAN countries, 2022 – 2024**

Unit: 1,000 Hectares

Country	2022(2021/22)	2023(2022/23)	Change2023 over 2022		2024(2023/24)	Change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	9,649.61	9,714.97	65.36	0.68	9,694.32	-20.65	-0.21
Brunei	N/A						
Cambodia	144.21	216.39	72.18	50.05	145.17	-71.21	-32.91
Indonesia	4,261.70	4,288.35	26.65	0.63	4,302.98	14.63	0.34
Lao PDR	90.00	140.08	50.08	55.64	140.90	0.82	0.59
Malaysia	11.00	11.29	0.29	2.64	11.44	0.15	1.33
Myanmar	607.66	601.26	-6.39	-1.05	600.30	-0.97	-0.16
Philippines	2,562.13	2,475.86	-86.27	-3.37	2,467.03	-8.83	-0.36
Singapore	N/A						
Thailand	1,084.81	1,081.74	-3.07	-0.28	1,116.50	34.76	3.21
Vietnam	888.10	900.00	11.90	1.34	910.00	10.00	1.11

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 19 Maize harvested area in ASEAN countries, 2022 – 2024**

Unit: 1,000 Hectares

Country	2022(2021/22)	2023(2022/23)	Change 2023 over 2022		2024(2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	9,630.51	9,689.93	59.42	0.62	9,673.33	-16.60	-0.17
Brunei	N/A						
Cambodia	140.16	211.01	70.85	50.55	144.83	-66.19	-31.37
Indonesia	4,261.10	4,288.35	27.25	0.64	4,302.98	14.63	0.34
Lao PDR	90.00	140.08	50.08	55.64	140.90	0.82	0.59
Malaysia	11.00	11.29	0.29	2.64	11.44	0.15	1.33
Myanmar	606.19	600.42	-5.76	-0.95	598.88	-1.54	-0.26
Philippines	2,562.13	2,475.86	-86.27	-3.37	2,467.03	-8.83	-0.36
Singapore	N/A						
Thailand	1,071.83	1,062.91	-8.91	-0.83	1,097.27	34.36	3.23
Vietnam	888.10	900.00	11.90	1.34	910.00	10.00	1.11

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

Table 20 Maize yield in ASEAN countries, 2022 – 2024

Unit: Tons/Hectares

Country	2022(2021/22)	2023(2022/23)	Change 2023 over 2022		2024(2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	4.64	4.74	0.10	2.16	4.83	0.09	1.90
Brunei	N/A						
Cambodia	5.65	5.82	0.17	3.01	5.53	-0.29	-4.98
Indonesia	5.49	5.58	0.09	1.64	5.77	0.19	3.41
Lao PDR	5.14	4.59	-0.55	-10.70	4.66	0.07	1.53
Malaysia	5.45	7.09	1.64	30.09	8.74	1.65	23.27
Myanmar	3.81	3.90	0.09	2.36	3.94	0.04	1.03
Philippines	3.26	3.39	0.13	3.99	3.41	0.02	0.59
Singapore	N/A						
Thailand	4.57	4.50	-0.07	-1.53	4.50	0.00	0.00
Vietnam	4.97	5.06	0.09	1.81	5.06	0.00	0.00

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

Table 21 Maize damaged area in ASEAN by cause of damage, 2023

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Unspecified	Others	
ASEAN	6,210	18,443	-	-	-	-	25,040
Brunei	-	-	-	-	-	-	-
Cambodia	5,371	-	-	-	-	-	5,371
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	839	-	-	-	-	-	839
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	18,443	-	-	387	-	18,830
Vietnam	-	-	-	-	-	-	-

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

Table 22 Maize balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	4,498,206	38,458,478	16,620,220	59,576,904	49,776,441	1,897,172	7,903,292	58,773,131
Brunei	N/A							
Cambodia	137,250	792,503		929,753	720,561	173,999	35,193	929,753
Indonesia	720,123	17,268,385	1,094,237	19,082,745	15,627,502	162,033	3,293,210	19,082,745
Lao PDR	141,223	462,810	9,088	613,121	490,497	97,631	24,993	613,121
Malaysia	-	*60,000	1,796,479	1,856,479	*1,854,662	1,817	-	1,856,479
Myanmar	2,072,858	2,311,351	10,006	4,394,215	201,362	1,318,931	2,873,922	4,394,215
Philippines	507,145	8,255,610	900,000	9,662,755	8,989,017		673,739	9,662,755
Singapore			5,796	5,796	5,728	68	-	5,796
Thailand	*186,133	4,895,728	*3,200,000	8,281,861	8,107,416	977	*173,468	8,281,861
Vietnam	733,473	4,412,092	9,604,614	14,750,179	13,779,696	141,715	828,767	13,946,405

Remark: * The value is estimated by AFSIS Secretariat.**Table 23 Maize balance sheet of ASEAN countries, 2023**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,903,292	39,684,793	16,318,393	63,906,478	53,699,891	1,494,595	8,711,992	63,906,478
Brunei	N/A							
Cambodia	35,193	1,227,599		1,262,792	872,255	17,406	373,131	1,262,792
Indonesia	3,293,210	17,656,388	925,813	21,875,411	17,716,264	167,049	3,992,097	21,875,411
Lao PDR	24,993	642,600	616	668,209	534,567	80,557	53,085	668,209
Malaysia	-	*80,000	*1,778,966	1,858,966	*1,857,070	*1,896	-	1,858,966.0
Myanmar	2,873,922	2,341,120	4,596	5,219,639	1,339,348	1,077,758	2,802,533	5,219,639
Philippines	673,739	*8,400,103	800,000	9,873,842	9,200,000		673,842	9,873,842
Singapore			1,586	1,586	1,479	107		1,586
Thailand	*173,468	4,782,983	*3,600,000	8,556,451	8,372,005	*1,000	*183,446	8,556,451
Vietnam	828,767	4,554,000	9,206,816	14,589,583	13,806,904	148,821	633,859	14,589,583

Remark: * The value is estimated by AFSIS Secretariat.**Table 24 Maize balance sheet of ASEAN countries, 2024**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	8,711,992	40,119,102	15,916,622	64,747,717	54,431,262	1,587,429	8,729,026	64,747,717
Brunei	N/A							
Cambodia	373,131	800,875		1,174,006	787,581	178,229	208,196	1,174,006
Indonesia	3,992,097	18,328,024	925,813	23,245,935	18,375,167	167,049	4,703,718	23,245,935
Lao PDR	53,085	656,100		709,185	631,793		77,391	709,185
Malaysia	-	*100,000	*1,761,625	1,861,625	*1,859,644	*1,981	-	1,861,625
Myanmar	2,802,533	2,360,008		5,162,541	1,325,228	1,090,181	2,747,132	5,162,541
Philippines	673,842	*8,412,844	*1,000,000	10,086,685	*9,400,000		686,685	10,086,685
Singapore			3,691	3,691	3,603	88		3,691
Thailand	*183,446	4,859,251	*3,400,000	8,442,698	8,265,415	*20,189	*157,094	8,442,698
Vietnam	633,859	4,602,000	8,825,493	14,061,352	13,782,830	129,712	148,810	14,061,352

Remark: * The value is estimated by AFSIS Secretariat.

Table 25 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	38,458,478	49,776,441	77.26	39,684,793	53,699,891	73.90	40,119,102	54,431,262	73.71
Brunei	N/A								
Cambodia	792,503	720,561	109.98	1,227,599	872,255	140.74	800,875	787,581	101.69
Indonesia	17,268,385	15,627,502	110.50	17,656,388	17,716,264	99.66	18,328,024	18,375,167	99.74
Lao PDR	462,810	490,497	94.36	642,600	534,567	120.21	656,100	631,793	103.85
Malaysia	60,000	1,854,662	3.24	80,000	1,857,070	4.31	100,000	1,859,644	5.38
Myanmar	2,311,351	201,362	1,147.86	2,341,120	1,339,348	174.80	2,360,008	1,325,228	178.08
Philippines	8,255,610	8,989,017	91.84	8,400,103	9,200,000	91.31	8,412,844	9,400,000	89.50
Singapore	-	5,728	0.00	-	1,479	0.00	-	3,603	0.00
Thailand	4,895,728	8,107,416	60.39	4,782,983	8,372,005	57.13	4,859,251	8,265,415	58.79
Vietnam	4,412,092	13,779,696	32.02	4,554,000	13,806,904	32.98	4,602,000	13,782,830	33.39

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

[24]

Table 26 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	59,576,904	49,776,441	119.69	63,906,478	53,699,891	119.01	64,747,717	54,431,262	118.95
Brunei	N/A								
Cambodia	929,753	720,561	129.03	1,262,792	872,255	144.77	1,174,006	787,581	149.06
Indonesia	19,082,745	15,627,502	122.11	21,875,411	17,716,264	123.48	23,245,935	18,375,167	126.51
Lao PDR	613,121	490,497	125.00	668,209	534,567	125.00	709,185	631,793	112.25
Malaysia	1,856,479	1,854,662	100.10	1,858,966	1,857,070	100.10	1,861,625	1,859,644	100.11
Myanmar	4,394,215	201,362	2,182.25	5,219,639	1,339,348	389.71	5,162,541	1,325,228	389.56
Philippines	9,662,755	8,989,017	107.50	9,873,842	9,200,000	107.32	10,086,685	9,400,000	107.31
Singapore	5,796	5,728	101.19	1,586	1,479	107.24	3,691	3,603	102.43
Thailand	8,281,861	8,107,416	102.15	8,556,451	8,372,005	102.20	8,442,698	8,265,415	102.14
Vietnam	14,750,179	13,779,696	107.04	14,589,583	13,806,904	105.67	14,061,352	13,782,830	102.02

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

Table 27 Quantity and Value of Maize Export by Countries of Destination in 2023

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									24	11,808			90,800	28,314,955
Lao PDR														
Malaysia	3	82,115			45,249	70,966,134								
Myanmar	120	36,000							2,170	613,000			108,265	31,858,000
Philippines														
Singapore	N/A													
Thailand					50	21,761								
Vietnam				6,251,885				930,842						4,059,529

[25]

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	117	80,085					90,941	28,406,848	400	93,603	91,341	28,500,451
Lao PDR			38,823	6,755,825	41,734	7,296,229	80,557	14,052,054			80,557	14,052,054
Malaysia	23	82,115					45,275	71,130,364	42	28,725	45,317	71,159,089
Myanmar	69	20,000	550,248	173,908,000	146,272	42,738,000	807,143	249,173,000	270,616	80,587,000	1,077,758	329,760,000
Philippines					245	736,408	245	736,408			245	736,408
Singapore	N/A											
Thailand							50	21,761			50	21,761
Vietnam		2,300					0	11,244,556		11,795	0	11,256,351

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

Table 28 Quantity and Value of Maize Import by Countries of Origin in 2023

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia														
Lao PDR														
Malaysia					0	8,137							3	558
Myanmar														
Philippines					86,400,317.74	29,784,427					38,826,020	13,057,667		
Singapore			5	28,575	425	298,965			236	330,494			0.96	442
Thailand							59,198	15,075,041			550,248	173,908,000		
Vietnam							60,404	21,113,183						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei							0	0			0	0
Cambodia							0	0			0	0
Indonesia							0.000	0	219,447	74,796,862	219,447	74,796,862
Lao PDR			457	778,120	159	392,422	616	1,170,542			616	1,170,542
Malaysia			203	188,636			206	197,330	516,117	170,462,363	516,322.14	170,659,693.32
Myanmar			3,106	12,409,000			3,106	12,409,000	1,490	5,960,000	4,596	18,369,000
Philippines			5,163	55,654	7,215,810	2,798,929	132,447,311	45,696,677	8,416,436	5,292,417	140,863,746	50,989,094
Singapore			40	80,962	1.45	6,736	709	746,174	878	1,299,236	1,586	2,045,410
Thailand							609,446	188,983,041			609,446	188,983,041
Vietnam			3,508	11,635,470			63,912	32,748,653	2,745,696	917,740,361	2,809,608	950,489,014

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

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

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	657	650	719	1,231	673	1,221	1,007	1,239	998	899	947	791	919
	2023	794	992	1,008										932
Lao PDR	2022	244	225	217	208	219	230	200	200	200	184	188	198	209
	2023	185	166	181										177
Myanmar	2022	227	246	218	312	312	312	346	334	300	262	289	295	288
	2023	302	319	319	310									312
Thailand	2022	329	343	385	386	388	378	347	338	322	326	343	356	353
	2023	407	403	375	381	382								390

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

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	342	334	313	331	392	796	797	765	1,043	707	669	682	597
	2023	337	348	347										344
Myanmar	2022	227	246	218	312	312	312	346	334	300	262	289	295	288
	2023	302	319	319	310									312
Singapore	2022	488	639	461	355	557	643	1,073	1,110	1,202	1,056	1,345	1,340	856
	2023	1,236	1,480	1,023	1,243	1,426	1,282	1,282	1,282	1,282	1,282	1,282	1,282	1,282
Vietnam	2022	320	323	336	361	378	384	380	363	345	326	330	334	348
	2023	335	338	340	341	317								334

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

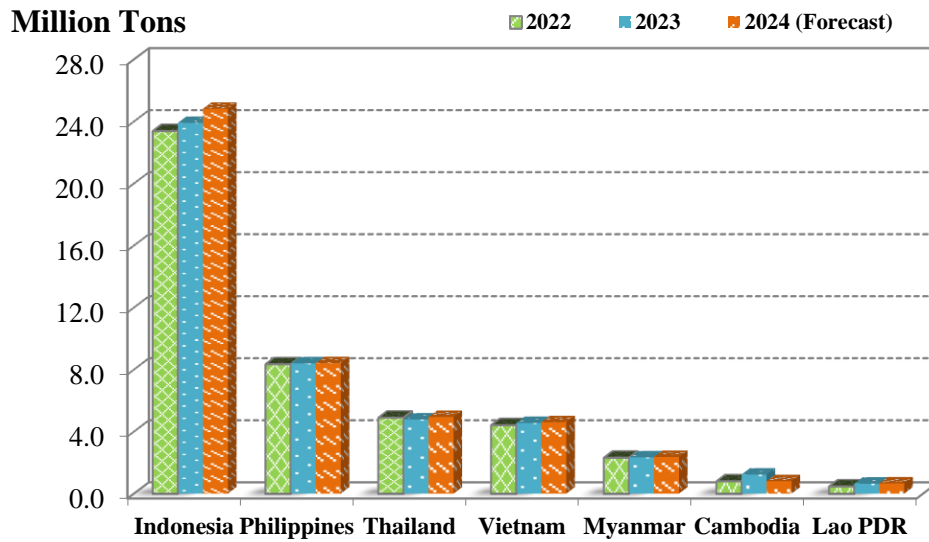


Figure 17 Maize production of selected countries in ASEAN, 2022 – 2024

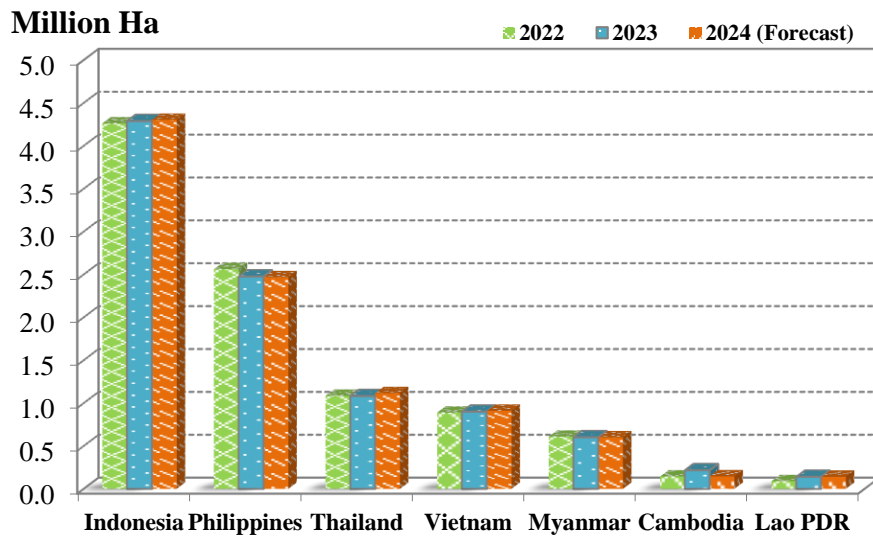


Figure 18 Maize planted area of selected countries in ASEAN, 2022 – 2024

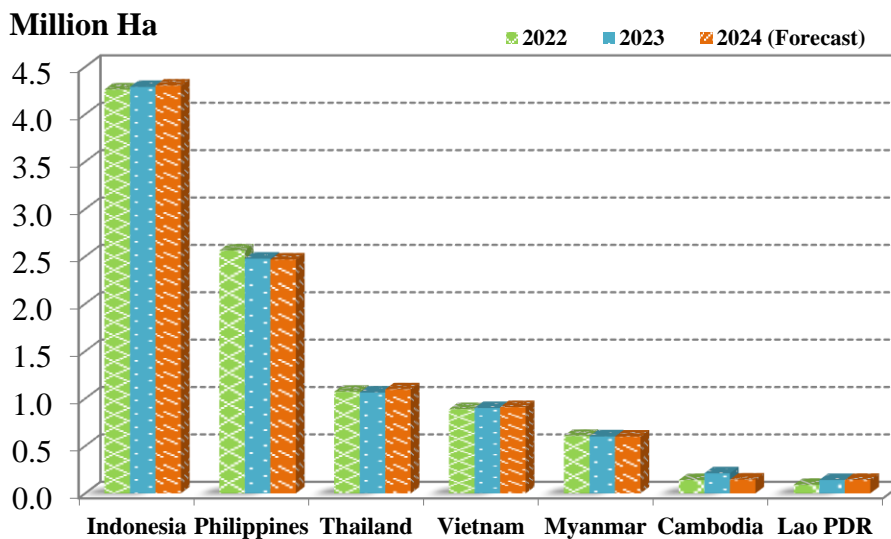


Figure 19 Maize harvested area of selected countries in ASEAN, 2022 – 2024

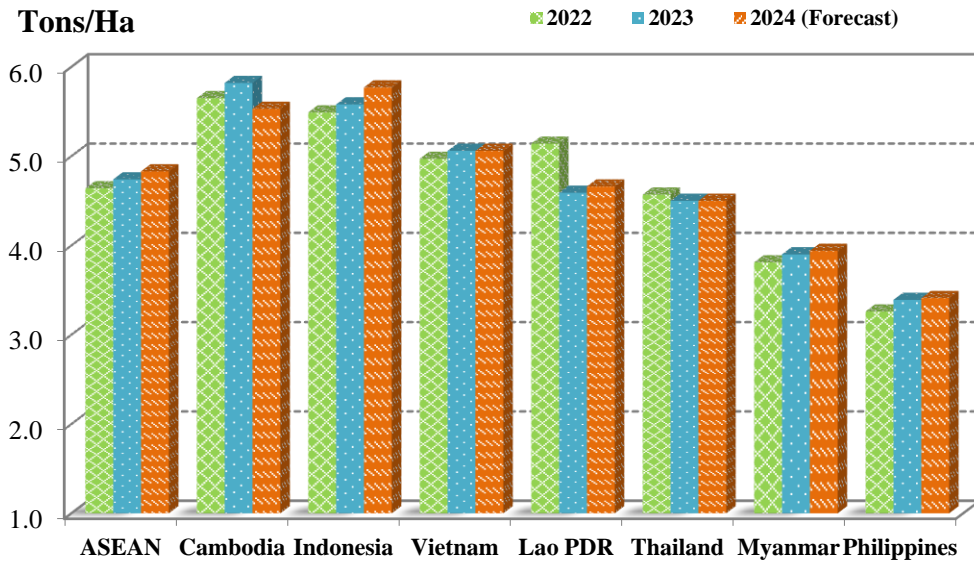


Figure 20 Maize yield of countries in ASEAN, 2022 – 2024

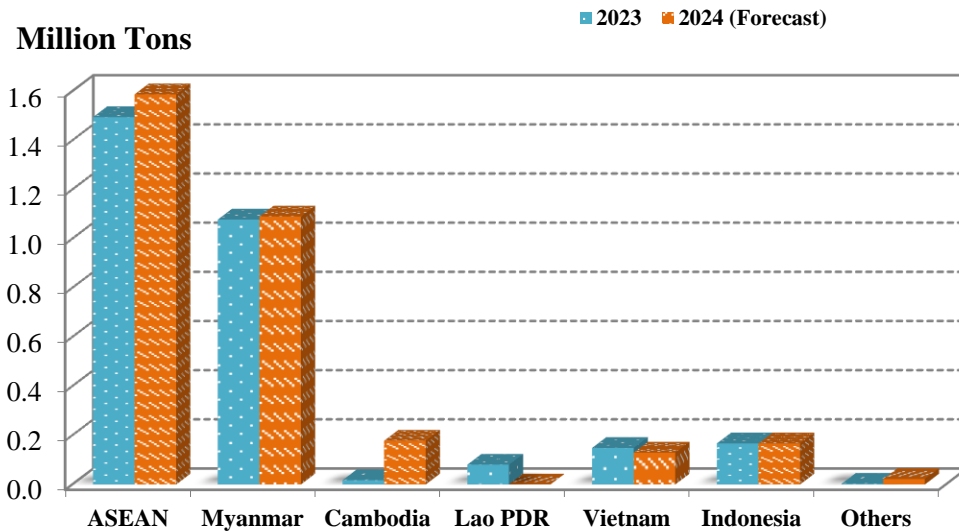
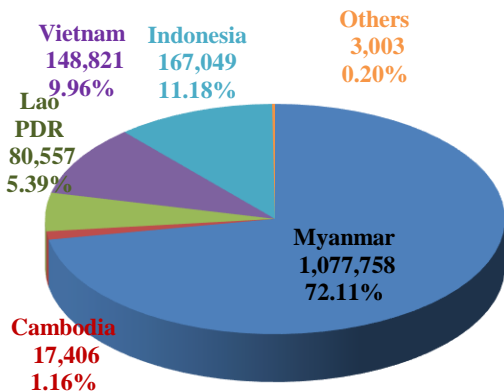
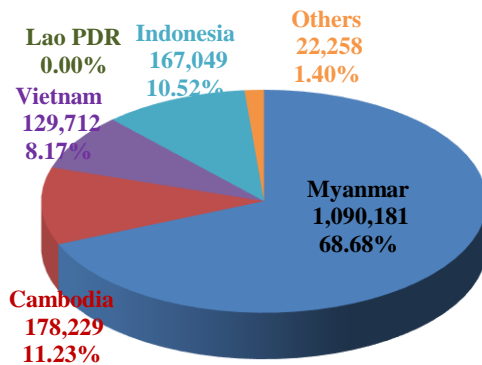


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2022– 2024



Total 1.49 million ton

Figure 22 Share of maize export (tons) among ASEAN countries, 2023



Total 1.59 million tons

Figure 23 Share of maize export (tons) among ASEAN countries, 2024

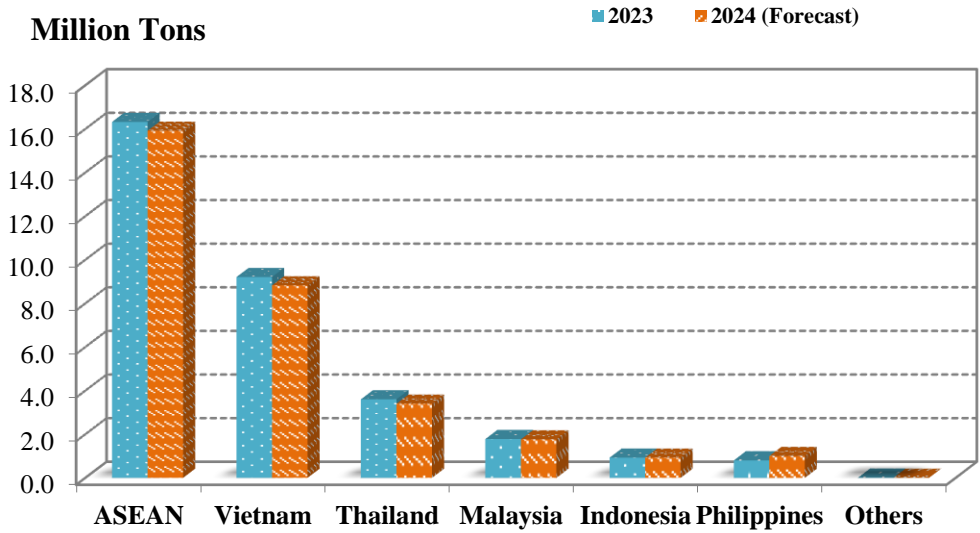
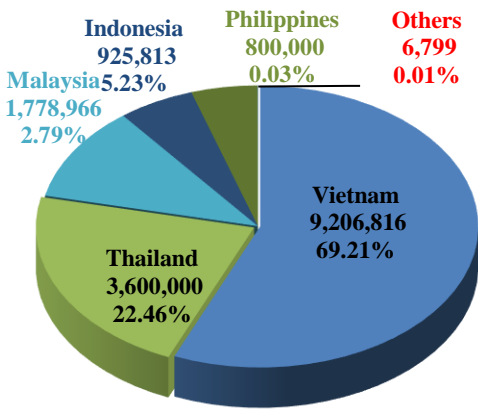
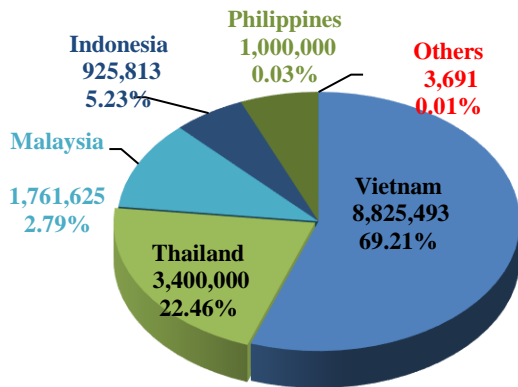


Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2023– 2024



Total 16.32 million tons

Figure 25 Share of maize import (tons) among ASEAN countries, 2023



Total 15.92 million tons

Figure 26 Share of maize import (tons) among ASEAN countries, 2024

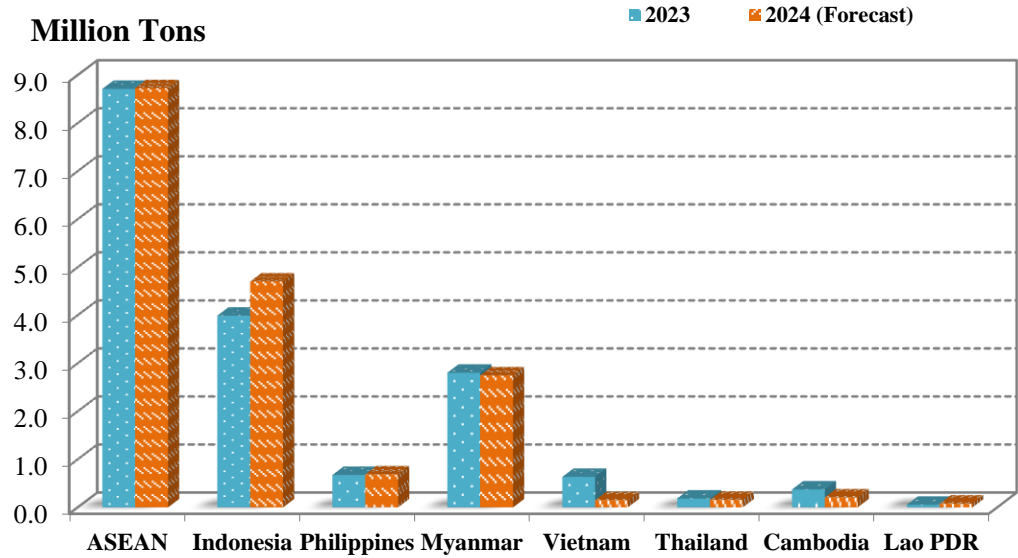


Figure 27 Amount of ending stock of maize in ASEAN countries in 2023 – 2024

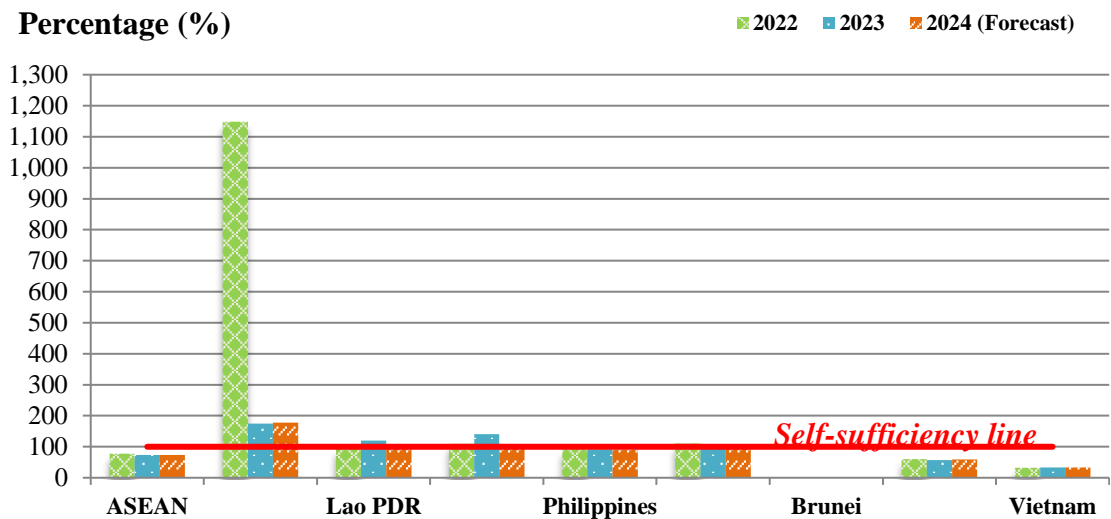


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2022 – 2024

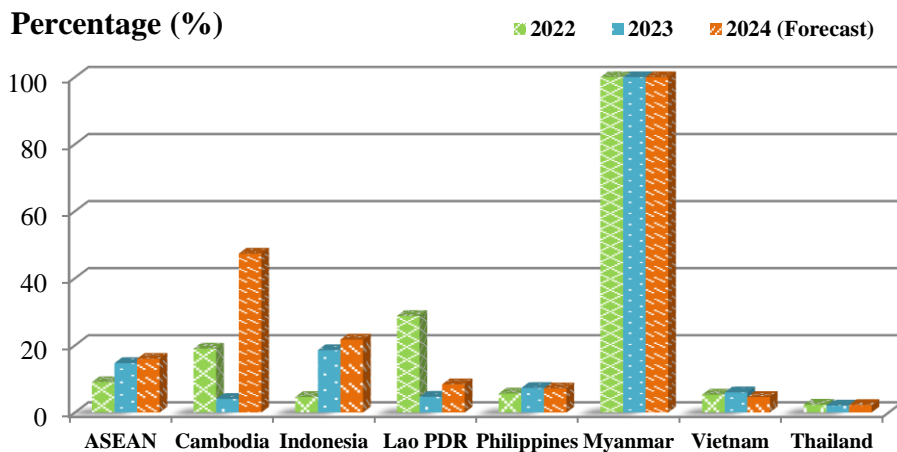


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

US\$/Ton

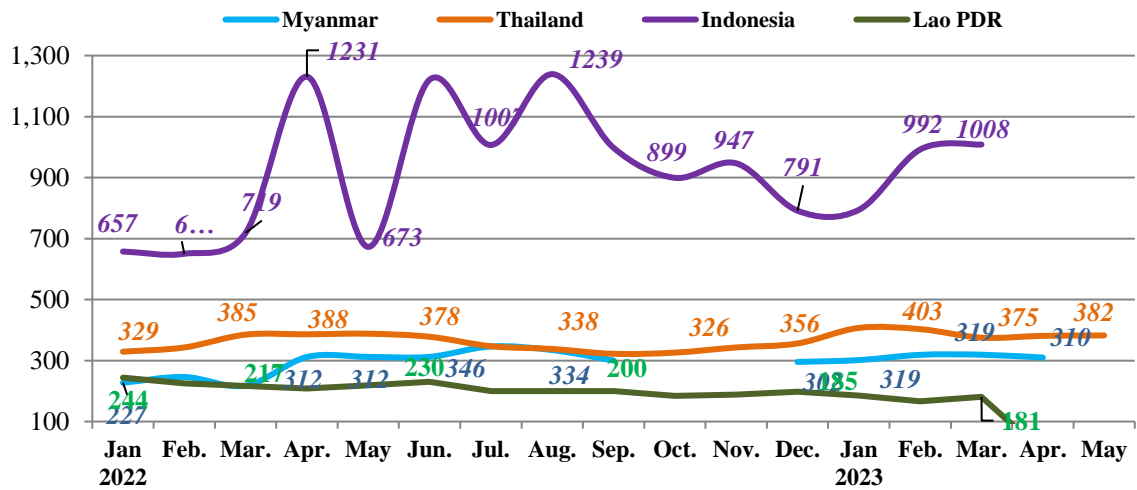


Figure 30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2022 – 2023

US\$/Ton

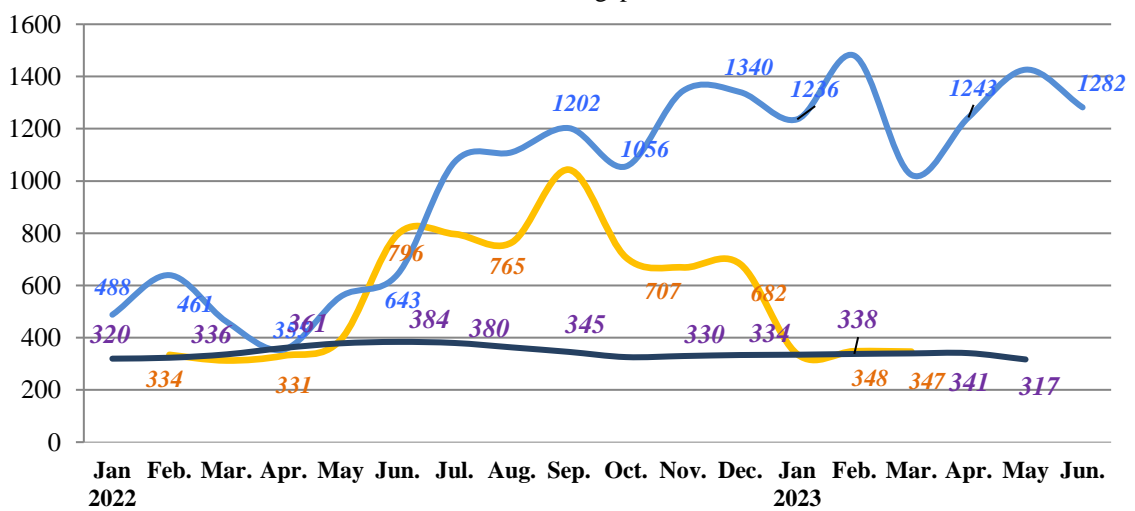


Figure 31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2022– 2023

Sugar Outlook for 2024



ASEAN sugar supply is forecast to decrease by approximately 6.82 percent or 2.56 million tons from 37.51 million tons in 2023 to 34.95 million tons in 2024, especially with the increase in beginning stock and production (Table 31).

The beginning stock of sugar in 2024 is estimated at 10.03 million tons, which decreases from 11.84 million tons in 2023.

The sugar production in 2024 is estimated at 16.45 million tons, which decreases from 17.85 million tons in 2023.

The sugar's import of 2024 is forecast to be 8.46 million tons, which increases around 8.18 percent from 7.82 million tons in 2023.

The export of sugar from ASEAN in 2024 is expected to decrease from 11.39 million tons in 2023 to 9.26 million tons in 2024.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2024 is forecast to be about 101.98 percent, which decreases from 110.91 percent in 2023.

The beginning stock to domestic utilization ratio (food security ratio) in 2024 is forecast to be about 62.21 percent, which decreases from 73.61 percent in 2023.

Table 31 Summary of the ASEAN sugar situation, 2023 – 2024

Unit: Million Tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	37.51	34.95	-2.56	-6.82
Beginning stock	11.84	10.03	-1.81	-15.29
Production	17.85	16.45	-1.40	-7.84
Import	7.82	8.46	0.64	8.18
Demand (Million tons)	37.51	34.95	-2.56	-6.82
Domestic utilization	16.09	16.13	0.04	0.25
Export	11.39	9.26	-2.13	-18.70
Ending stock	10.03	9.56	-0.47	-4.69
Ratio of production to domestic utilization (%)	110.91	101.98	-8.93	-
Ratio of beginning stock to domestic utilization (%)	73.61	62.21	-11.40	-

ASEAN Sugar Situation in 2023

► *Production*

Sugarcane production in ASEAN in 2023 (2022/23 crop year) was estimated at 174.24 million tons, rise 3.19 million tons from 171.05 million tons in 2022 or about 1.86 percent (Table 32, Figure 32). The increase in production was due to the increase in the production of Cambodia, Thailand, Indonesia, Vietnam, and Lao PDR. The harvested area of sugarcane in ASEAN in 2023 was estimated at 2.86 million hectares, slightly increasing from 2.64 million hectares in 2022 (Table 34).

Thailand, the largest sugar producing country in the region, the production was estimated to increase mainly due to farmers' response to price increase together with government policy (Table 32-35, Figure 32-35).

The production in **Indonesia** was estimated to rise due to the increase in planted area and harvested area. The expansion of planted area was caused by favorable weather together with government policy, and farmers took better care of their crops.

Vietnam was estimated to increase its production due to the increase in the planted area, harvested area, and yield. The increasing in planted area was due to farmers' response to price increases. The increasing in yield was because farmers used more fertilizer of their crops.

In **the Philippines**, the production was estimated to down due to the decrease in planted area and harvested area.

Myanmar was estimated to decrease its production due to the decrease in planted area and harvested area.

For **Lao PDR**, the production was estimated to increase due to the increase in planted and harvested area, and yield.

Production in **Cambodia** was estimated to increase due to the increase in the planted area, harvested area, and yield.

► *Utilization and Stock*

Regarding domestic utilization of sugar in the ASEAN, it has slightly decreased to 16.09 million tons in 2023 from 16.18 million tons in 2022 (Table 37-38). The beginning stock of sugar in ASEAN in 2023 was estimated at 11.84 million tons, which significantly increased about 36.80 percent from 2022. The ending stock of sugar in ASEAN in 2023 was estimated to be about 10.03 million tons, a decrease of about 17.79 percent from 2022.

The ratio of sugar production to domestic utilization (**self-sufficient ratio**) in 2023 was estimated to be about 110.91 percent. **This indicated that the ASEAN itself produced adequate sugar for the regional consumption** (Table 40, Figure 43). Moreover, on the country-by-country basis, sugar production in Cambodia and Thailand exceeds the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (**food security ratio**) was estimated to be about 73.61 percent in 2023, compared to 55.54 percent in 2022. **This indicated that the sugar availability in the region was increase from the previous year** (Table 41, Figure 44).

Overall, despite sugar production in ASEAN was increased, the production volume was sufficient for consumption within the ASEAN region. However, many ASEAN countries still rely on sugar import from abroad. Even through sugar may not be a staple food for the ASEAN region, it is an important ingredient used in many kinds of food, especially in the desserts industry.

Sugar is also an alternative food ingredient for people in many countries in the world, which are facing food crisis.

According to the analysis of sugar price, world export, and demand of sugar, the sugar producing countries will produce more sugar in order to meet the demand in ASEAN region. Thus, these countries will earn high revenue from their export.

► **Trade**

The sugar's export from ASEAN in 2023 was 11.39 million tons, which increased about 4.21 million tons or 58.57 percent from 2022 (Table 37-38, Figure 36-37). Thailand is the major sugar exporting country in the region, which constituted about 87.82 percent of the total ASEAN export or about 10 million tons.

For the import, ASEAN in 2023 as a whole imported sugar around 7.82 million tons, decreasing about 22.10 percent from the previous year (Table 37-38, Figure 39-40).

The quantity and value of sugar export by countries of destination and the

quantity and value of import by countries of origin are given in Tables 42 and 43, respectively.

► **Prices**

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2022-2023 are shown in Tables 44-45. The annual average of Thailand FOB prices of raw sugar and white sugar in 2023 (January-February) were estimated at 472 US\$/ton and 562 US\$/ton, respectively. The prices of raw sugar of 2023 were higher than those of 2022, likewise, the prices of white sugar of 2023 were higher than those of 2022. The average CIF price (January-December) in Singapore in 2023 was estimated at 627 US\$/ton, which was higher than in 2022.

► **Damaged Area**

The sugarcane damaged area in ASEAN in 2023 was reported to be 1,662 hectares, which occurred in Cambodia (Table 36).

Prospects for Sugar in 2024

► *Production*

Sugarcane production in ASEAN is forecast to increase from 174.24 million tons in 2023 to 175.68 million tons in 2024 (Table 32-35, Figure 32-35). Thailand, the largest sugar-producing country in the region, is forecast to increase its production from 93.88 million tons in 2023 to 94.50 million tons in 2024. The increase in Thailand production is mainly caused by increasing in yield.

The second increase in terms of quantity is found in **Indonesia**, which is expected to increase its production from 37.46 million tons in 2023 to 38.52 million tons in 2024. The increase in its production is due to the increase in planted area and harvested area, caused by farmers' response to price increases, favorable weather, and farmers took better care of their crops.

For **Vietnam**, the production is forecast to increase from 8.76 million tons in 2023 to 9.20 million tons in 2024. The main reason is due to the increase in planted area harvested area, and yield.

For **Brunei**, the smallest sugar-producing country in the region, is expected to remain its production.

Cambodia, the production is expected to decrease from 2.37 million tons in 2023 to 19.22 million tons in 2024, the decrease comes from the decrease in planted area harvested area, and yield.

Lao PDR is also forecast to slight increase its production from 1.64 million tons in 2023 to 1.65 million tons in 2024, the increase comes because the price of competing crop increases.

The Philippines is expected to decrease its production from 19.22 million tons in 2023 to 18.18 million tons in 2024. The

decrease in the Philippines production is due to the decrease in planted and harvested areas.

For **Myanmar**, the production is forecast to increase from 10.88 million tons in 2023 to 11.70 million tons in 2024 due to the increase in planted area, harvested area, and yield.

► *Utilization and Stock*

The domestic utilization of sugar in ASEAN is forecast to increase from 16.09 million tons of sugar in 2023 to 16.13 million tons in 2024, which increases about 0.05 million tons (Table 38-39). The beginning stock in ASEAN is estimated at 10.03 million tons of sugar in 2024, a decrease of 1.81 million tons from 11.84 million tons in the previous year. The ending stock of sugar in ASEAN in 2024 is forecast to be 9.56 million tons which decreases about 0.47 million tons from the previous year.

The ratio of production to domestic utilization in 2024 is forecast to be 101.98 percent, which is lower than the previous year (Table 40, Figure 43).

The ratio of the beginning stock to domestic utilization in 2024 is forecast to be about 62.21 percent, which moderately decreases from 2023 (Table 41, Figure 44). This indicates that the domestic availability of sugar in the region is expected to decrease significantly compared to the previous year.

► *Trade*

The export is predicted to decrease from 11.39 million tons in 2023 to 9.26 million tons in 2024 (Table 38-39, Figure 36-38). The import is forecast to be 8.46 million tons in 2024, which increases from 7.82 million tons in the previous year (Tables 38-39, Figure 39-41).

Table 32 Sugarcane production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	171,047.48	174,235.12	3,187.64	1.86	175,679.89	1,444.78	0.83
Brunei	0.08	0.09	0.00	5.94	0.09	0.00	5.00
Cambodia	1,855.23	2,374.01	518.79	27.96	1,922.64	-451.37	-19.01
Indonesia	36,436.78	37,463.34	1,026.56	2.82	38,518.82	1,055.48	2.82
Lao PDR	1,502.27	1,642.00	139.73	9.30	1,653.00	11.00	0.67
Malaysia	N/A						
Myanmar	11,333.35	10,880.60	-452.74	-3.99	11,703.26	822.66	7.56
Philippines	20,326.12	19,222.92	-1,103.20	-5.43	18,179.60	-1,043.32	-5.43
Singapore	N/A						
Thailand	92,070.67	93,887.88	1,817.21	1.97	94,500.00	612.12	0.65
Vietnam	7,522.98	8,764.28	1,241.29	16.50	9,202.49	438.21	5.00

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

Table 33 Sugarcane planted area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	2,639.59	2,864.62	225.03	8.53	2,804.12	-60.50	-2.11
Brunei	N/A						
Cambodia	43.14	48.37	5.23	12.12	43.79	-4.58	-9.47
Indonesia	488.98	509.61	20.63	4.22	531.10	21.50	4.22
Lao PDR	30.44	33.00	2.57	8.43	33.66	0.66	2.00
Malaysia	N/A						
Myanmar	173.17	165.28	-7.90	-4.56	175.88	10.60	6.42
Philippines	357.79	338.37	-19.42	-5.43	320.01	-18.37	-5.43
Singapore	N/A						
Thailand	1,427.20	1,638.40	211.20	14.80	1,564.80	-73.60	-4.49
Vietnam	118.87	131.59	12.72	10.70	134.88	3.29	2.50

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

Table 34 Sugarcane harvested area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	2,637.85	2,864.62	226.77	8.60	2,804.12	-60.50	-2.11
Brunei	N/A						
Cambodia	41.48	48.37	6.89	16.61	43.79	-4.58	-9.47
Indonesia	488.98	509.61	20.63	4.22	531.10	21.50	4.22
Lao PDR	30.44	33.00	2.57	8.43	33.66	0.66	2.00
Malaysia	N/A						
Myanmar	173.10	165.28	-7.82	-4.52	175.88	10.60	6.42
Philippines	357.79	338.37	-19.42	-5.43	320.01	-18.37	-5.43
Singapore	N/A						
Thailand	1,427.20	1,638.40	211.20	14.80	1,564.80	-73.60	-4.49
Vietnam	118.87	131.59	12.72	10.70	134.88	3.29	2.50

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

Table 35 Sugarcane yield in ASEAN countries, 2022 – 2024

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	64.84	60.82	-4.02	-6.20	62.65	1.83	3.01
Brunei	N/A						
Cambodia	44.72	49.08	4.36	9.75	43.90	-5.18	-10.55
Indonesia	74.52	73.51	-1.01	-1.36	72.53	-0.98	-1.33
Lao PDR	49.36	49.76	0.40	0.81	49.11	-0.65	-1.31
Malaysia	N/A						
Myanmar	65.47	65.83	0.36	0.55	66.54	0.71	1.08
Philippines	56.81	56.81	0.00	0.00	56.81	0.00	0.00
Singapore	N/A						
Thailand	64.51	57.30	-7.21	-11.18	60.39	3.09	5.39
Vietnam	63.29	66.60	3.31	5.23	68.23	1.63	2.45

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 36 Sugarcane damaged area in ASEAN by cause of damage, 2023**

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecified	Total
ASEAN	1,662	-	-	-	-	-	1,662
Brunei	N/A						
Cambodia	1,662	-	-	-	-	-	1,662
Indonesia	-	-	-	-	-	-	-
Lao PDR.	-	-	-	-	-	-	-
Malaysia	N/A						
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	N/A						
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

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

Table 37 Sugar balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	8,986,314	16,542,061	10,040,734	35,569,109	16,180,554	7,180,795	12,207,759	35,569,109
Brunei	3,632	-	4,878	8,510	4,959	-	3,552	8,510
Cambodia		185,524		185,524	103,446	82,078	0	185,524
Indonesia	744,206	2,405,907	5,857,606	9,007,719	6,875,596	420,323	1,711,800	9,007,719
Lao PDR	1,522,822	300,454	146,430	1,969,706	-	48,938	1,920,768	1,969,706
Malaysia			1,885,470	1,885,470	*1,645,109	240,361	0	1,885,470
Myanmar	992,730	746,074	97,000	1,835,804	755,924	284,227	795,653	1,835,804
Philippines	330,861	1,995,041	362,473	2,688,375	1,980,602	-	707,773	2,688,375
Singapore			267,990	267,990	214,919	53,071	0	267,990
Thailand	*4,909,779	10,156,762	117,194	15,183,735	2,500,000	5,905,547	*6,778,188	15,183,735
Vietnam	482,284	752,298	1,301,693	2,536,275	2,100,000	146,250	290,026	2,536,275

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

[39]

Table 38 Sugar balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	11,844,007	17,845,013	7,821,966	37,510,986	16,089,728	11,386,285	10,034,974	37,510,986
Brunei	3,552	-	5,472	9,023	5,341	-	3,682	9,023
Cambodia		237,401		237,401	105,169	*132,232	0	237,401
Indonesia	1,711,800	2,740,730	4,066,412	8,518,943	6,859,359	462,355	1,197,228	8,518,943
Lao PDR	1,920,768	328,400	7,090	2,256,258	-	70,257	2,186,001	2,256,258
Malaysia			*1,889,301	1,889,301	*1,684,994	*204,307	0	1,889,301
Myanmar	795,653	716,270	74,000	1,585,923	855,256	276,039	454,627	1,585,923
Philippines	344,021	*1,886,760	474,927	2,705,708	2,030,771		674,937	2,705,708
Singapore			227,942	227,942	158,837	69,106	0	227,942
Thailand	6,778,188	11,059,024	*80,000	17,917,212	2,500,000	*10,000,000	*5,417,212	17,917,212
Vietnam	290,026	876,428	996,822	2,163,275	1,890,000	171,989	101,286	2,163,275

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

Table 39 Sugar balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	10,034,974	16,450,519	8,463,625	34,949,118	16,130,619	9,255,567	9,562,932	34,949,118
Brunei	3,682	-	5,434	9,116	5,311	-	3,805	9,116
Cambodia		192,264		192,264	108,659	*83,605		192,264
Indonesia	1,197,228	*2,818,037	*4,449,512	8,464,777	6,903,341	*485,473	1,075,962	8,464,777
Lao PDR	2,186,001	330,600		2,516,601	-		2,516,601	2,516,601
Malaysia			*1,893,139	1,893,139	*1,699,048	*194,091		1,893,139
Myanmar	454,627	770,426		1,225,053	660,672	282,191	282,190	1,225,053
Philippines	674,937	*1,784,356	*498,673	2,957,966	*2,082,210		*875,757	2,957,966
Singapore			247,966	247,966	186,878	61,088		247,966
Thailand	5,417,212	9,634,587	*100,000	15,151,799	2,500,000	*8,000,000	*4,651,799	15,151,799
Vietnam	101,286	920,249	1,268,901	2,290,436	1,984,500	149,119	156,818	2,290,436

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

Table 40 Ratio of sugar production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	16,542,061	16,180,554	102.23	17,845,013	16,089,728	110.91	16,450,519	16,130,619	101.98
Brunei	-	4,959	-	-	5,341	-	-	5,311	-
Cambodia	185,524	103,446	179.34	237,401	105,169	225.73	192,264	108,659	176.94
Indonesia	2,405,907	6,875,596	34.99	2,740,730	6,859,359	39.96	2,818,037	6,903,341	40.82
Lao PDR	300,454	-	-	328,400	-	-	330,600	-	-
Malaysia	-	1,645,109	-	-	1,684,994	-	-	1,699,048	-
Myanmar	746,074	755,924	98.70	716,270	855,256	83.75	770,426	660,672	116.61
Philippines	1,995,041	1,980,602	100.73	1,886,760	2,030,771	92.91	1,784,356	2,082,210	85.70
Singapore	-	214,919	-	-	158,837	-	-	186,878	-
Thailand	10,156,762	2,500,000	406.27	11,059,024	2,500,000	442.36	9,634,587	2,500,000	385.38
Vietnam	752,298	2,100,000	35.82	876,428	1,890,000	46.37	920,249	1,984,500	46.37

Remark: * The value is estimated by AFSIS Secretariat.

[41]

Table 41 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	8,986,314	16,180,554	55.54	11,844,007	16,089,728	73.61	10,034,974	16,130,619	62.21
Brunei	3,632	4,959	73.25	3,552	5,341	66.50	3,682	5,311	69.33
Cambodia	-	103,446	-	-	105,169	-	-	108,659	-
Indonesia	744,206	6,875,596	10.82	1,711,800	6,859,359	24.96	1,197,228	6,903,341	17.34
Lao PDR	1,522,822	-	-	1,920,768	-	-	2,186,001	-	-
Malaysia	-	1,645,109	-	-	1,684,994	-	-	1,699,048	-
Myanmar	992,730	755,924	131.33	795,653	855,256	93.03	454,627	660,672	68.81
Philippines	330,861	1,980,602	16.71	344,021	2,030,771	16.94	674,937	2,082,210	32.41
Singapore	-	214,919	-	-	158,837	-	-	186,878	-
Thailand	4,909,779	2,500,000	196.39	6,778,188	2,500,000	271.13	5,417,212	2,500,000	216.69
Vietnam	482,284	2,100,000	22.97	290,026	1,890,000	15.35	101,286	1,984,500	5.10

Remark: * The value is estimated by AFSIS Secretariat.

Table 42 Quantity and Value of Sugar Export by Countries of Destination in 2023

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia	N/A													
Lao PDR														
Malaysia	4	5,085	1	940	608	350,465					3,000	1,606,635	9,575	6,252,838
Myanmar														
Philippines	N/A													
Singapore	N/A													
Thailand	1,768	1,006,607	156,575	86,030,912	1,158,133	521,584,634	112,100	62,777,515	157,110	75,237,143	17,871	14,101,404	196,165	97,162,150
Vietnam				891,428		654,995		486,562		3,441,015				6,241,515

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	N/A											
Lao PDR					145	8,832	145	8,832	70,112	3,505,609	70,257	3,514,441
Malaysia	7,453	4,387,269	10	20,658	425	252,635.22	21,077	12,876,526	13,181	8,071,301	34,258	20,947,828
Myanmar	17	2,000					17	2,000	276,022	14,239,000	276,039	14,241,000
Philippines	N/A											
Singapore	N/A											
Thailand	44,933	25,593,232			18,318	10,838,536	1,862,974	894,332,133	2,888,337	1,407,209,832	4,751,311	2,301,541,965
Vietnam		591,620		4,750,927				17,058,061		57,652,387		74,710,448

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

Table 43 Quantity and Value of Sugar Import by Countries of Origin in 2023

Quantity: Tons Values: US\$

Importing Country	Country of origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia	N/A													
Lao PDR														
Malaysia					814	455,880								
Myanmar	N/A													
Philippines	N/A													
Singapore					2,210	1,459,762			23,870	14,859,257	18	7,475	0.91	4,899
Thailand					2,196	8,541,471	13,550	2,357,423	490	1,587,877	67	36,102	297	1,142,152
Vietnam				8,529,820		40,343,236		16,216,940		3,307,764		15,431,358		3,859,784

[43]

Importing Country	Country of origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	N/A											
Lao PDR			6,984	3,071,055			6,984	3,071,055	107	12,243	7,091	3,083,298
Malaysia	112	76,075	270,407	151,414,402	42	35,396	271,375	151,981,754	507,064	267,479,118	778,439	419,460,872
Myanmar	N/A											
Philippines	N/A											
Singapore			161,342	100,627,543	1,023	865,654	188,463	117,824,590	39,479	25,392,244	227,942	143,216,834
Thailand	239.78	745,092			986.721	5,650,947	17,826	20,061,064	104,194	84,688,921	122,021	104,749,986
Vietnam		3,444,471		13,456,525				104,589,899		135,917,589		240,507,488

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

Table 44 FOB Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Myanmar	Not specified	2022	52	56	80	57	55	44	50				80	63	60
		2023	48	47	47	79									
Malaysia	Not specified	2022	550	550	554	568	591	580	592	594	583	581	600	572	576
		2023	576	585	620	637									
Thailand	Raw Sugar	2022	440	448	405	428	435	442	440	450	512	458	505	516	457
		2023	488	456											
	White Sugar	2022	511	507	490	517	521	523	526	558	541	547	591	588	535
		2023	583	540											

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

Table 45 CIF Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Refine Sugar	2022	564	555	593	557	625	611	636	628	641	628	625	745	617
		2023	685	611	590										
	Other Sugar	2022	486	485	484	508	512	503	501	493	486	479	500	494	494
		2023	500	503	512										
Lao PDR	Not specified	2022	433	446	455	468	481	472	-	-	-	450	450	450	456
		2023	442	446	440										
Malaysia	Not specified	2022	468	386	374	474	513	549	438	432	506	503	444	516	467
		2023	526	514	564	539									
Singapore	Sugar	2022	562	563	615	607	599	623	658	627	651	645	667	617	620
		2023	596	610	626	620	681	627	627	627	627	627	627	627	

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

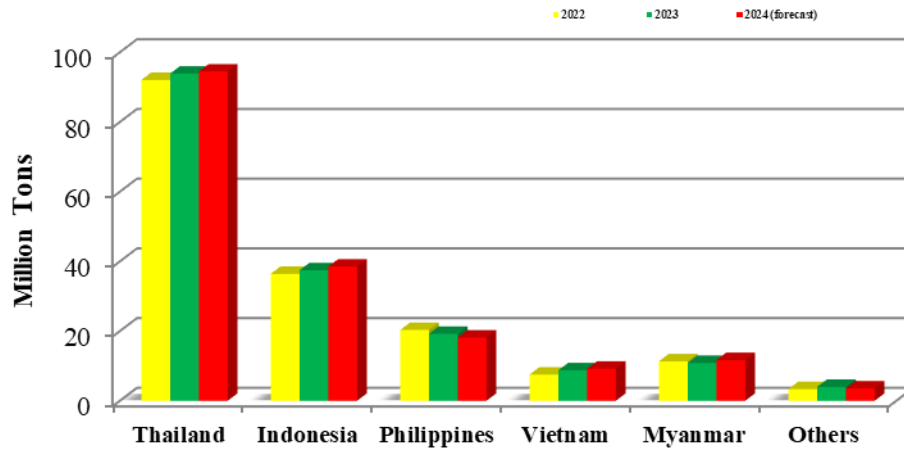


Figure 32 Sugarcane production of selected countries in ASEAN, 2022 – 2024

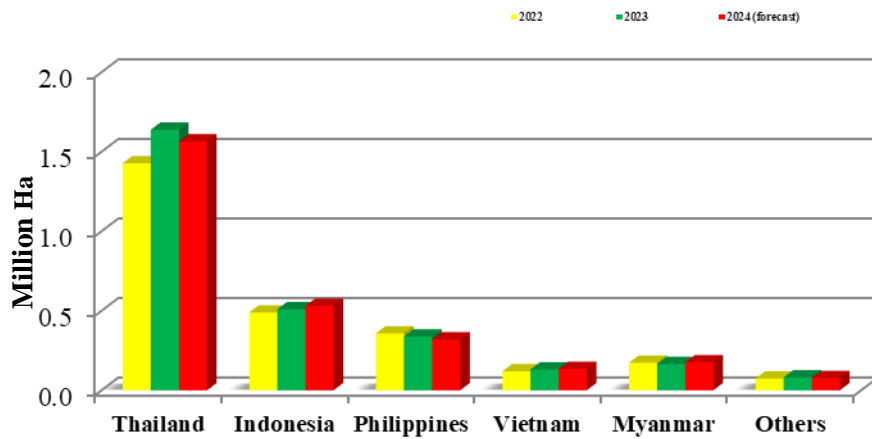


Figure 33 Sugarcane planted area of selected countries in ASEAN, 2022 – 2024

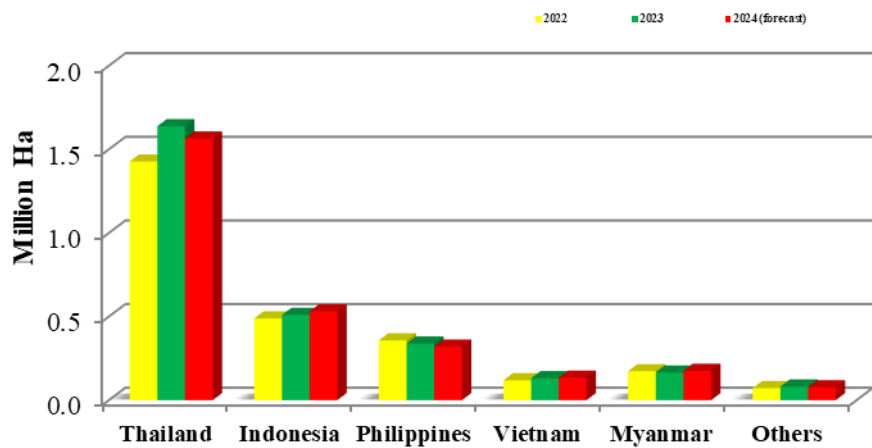


Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2022– 2024

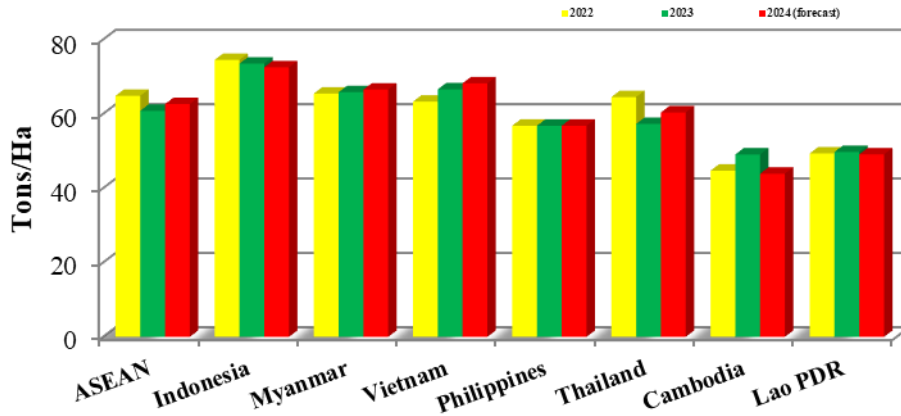


Figure 35 Sugarcane yield of selected countries in ASEAN, 2022 – 2024

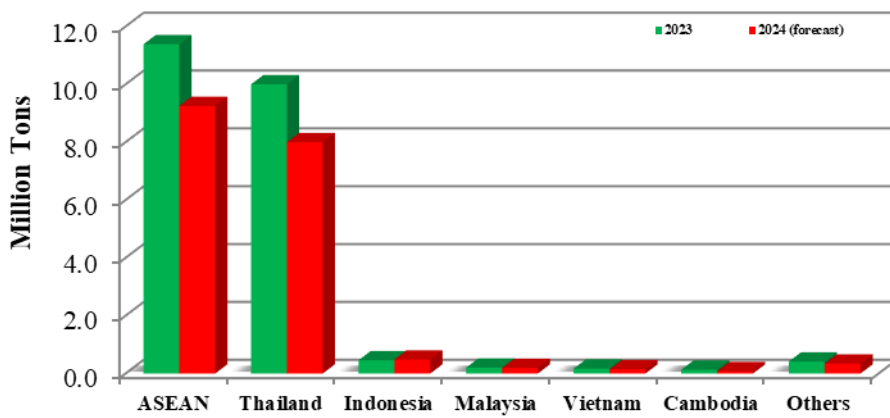
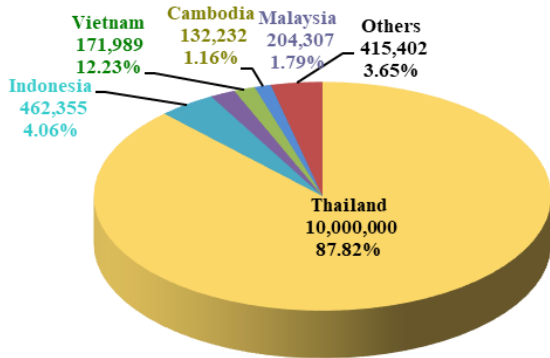
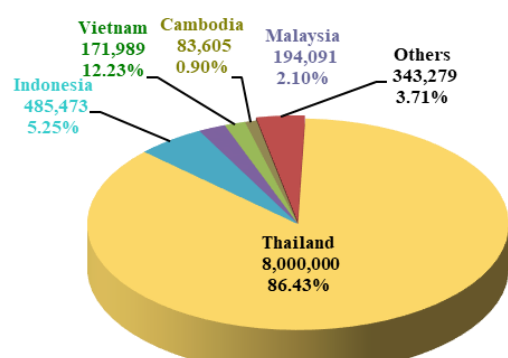


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 11.39 Million Tons

Figure 37 Share of sugar export (tons) among ASEAN countries, 2023



Total 9.26 Million Tons

Figure 38 Share of sugar export (tons) among ASEAN countries, 2024

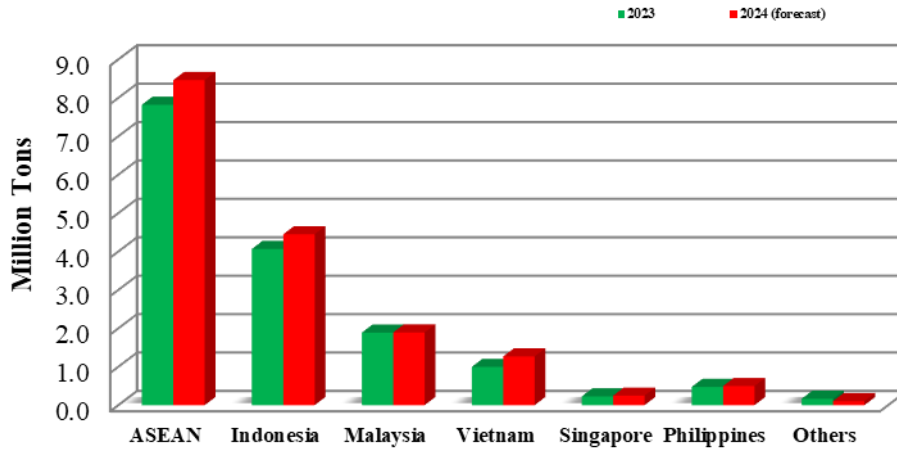
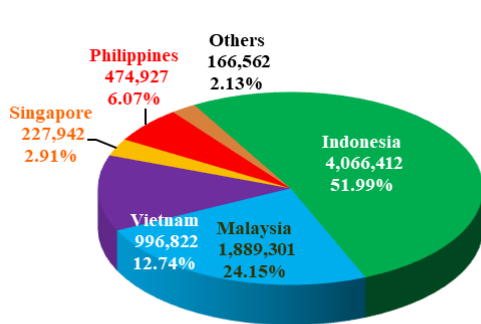
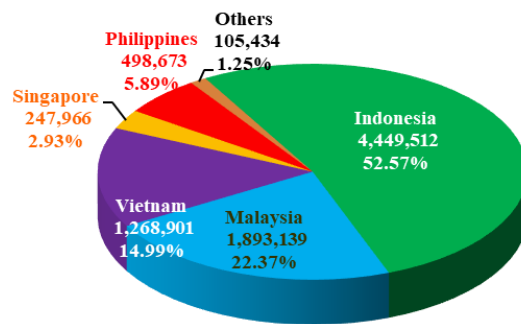


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 7.82 Million Tons
Figure 40 Share of sugar import (tons) among ASEAN countries, 2023



Total 8.46 Million Tons
Figure 41 Share of sugar import (tons) among ASEAN countries, 2024

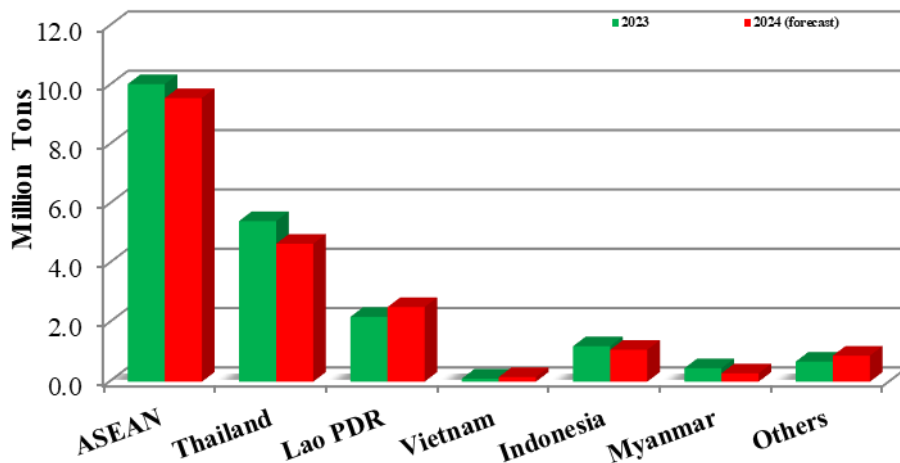


Figure 42 Amount of ending stock of Sugar in ASEAN countries in 2023– 2024

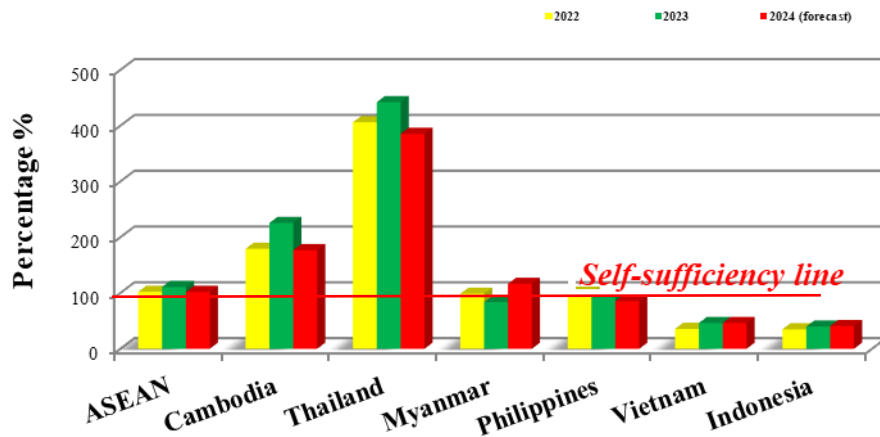


Figure 43 Ratio of sugar production to domestic utilization in ASEAN countries, 2022 – 2024

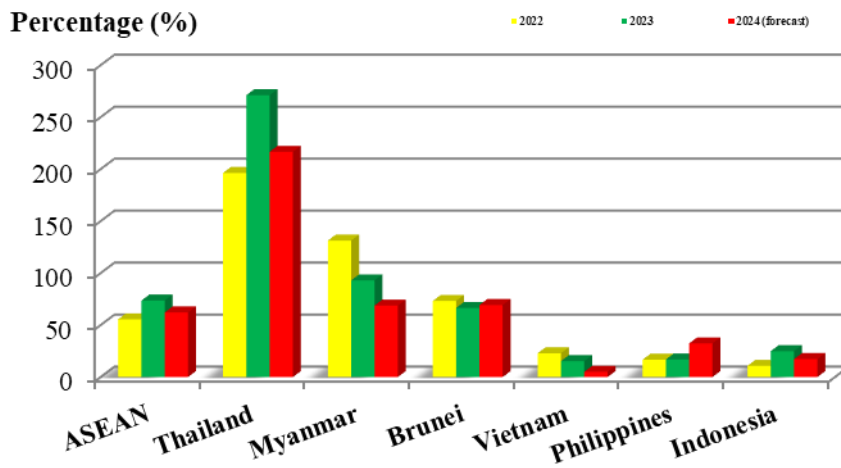


Figure 44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2022– 2024

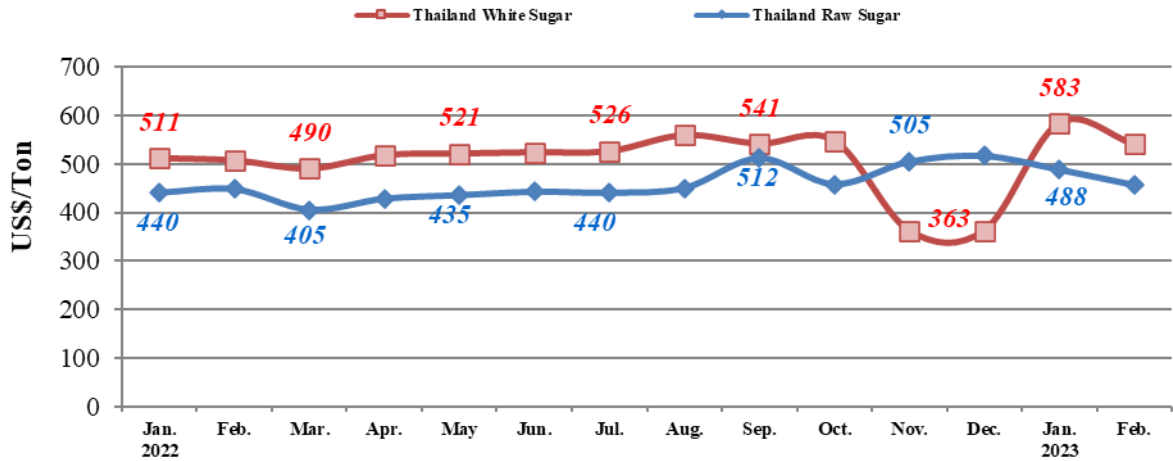


Figure 45 FOB price (US\$/Ton) of white sugar and raw sugar in Thailand in 2022 – 2023

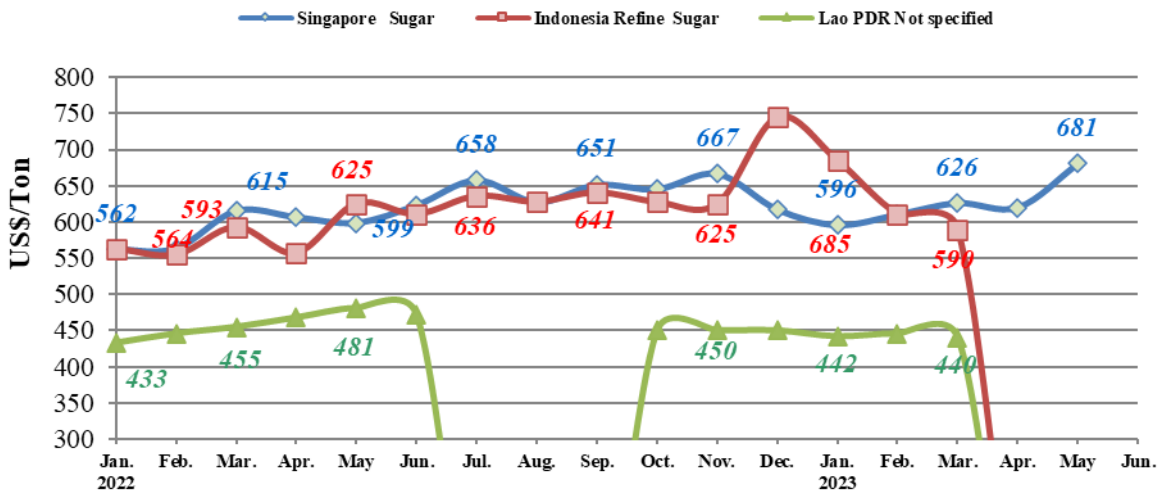


Figure 46 CIF price (US\$/Ton) of sugar of selected countries in ASEAN in 2022 – 2023

Soybean Outlook for 2024

Highlights

The supply of ASEAN soybean in 2024 is forecast to increase from 10.27 million tons in 2023 to 9.78 million tons or approximately 5.01 percent (Table 46). The growth in supply mainly comes from the increase in stock, production and import, which stock increase by approximately 33.82 percent. The soybean production is predicted to be 0.68 million tons in 2024, which increases from the previous year at 0.04 million tons.

In 2024, the beginning stock of soybean in ASEAN is forecast to increase 0.91 million tons, which increases by 0.23 million tons from 0.68 million tons in 2023. Additionally, the ending stock is expected to be 1.23 million tons in 2024, an increase by 0.32 million tons or approximately 35.16 percent from 0.91 million tons in 2023.

In terms of soybean's demand in ASEAN in 2024, the domestic utilization is estimated at 9.00 million tons, which increases in the demand for 0.17 million tons from 8.83 million tons in 2023.

The export in 2024 is forecast to be 0.04 million tons. This indicates that ASEAN exports very few amounts of soybeans.

The production to domestic utilization ratio (self-sufficiency ratio) in 2024 is forecast to be 7.55 percent, which increase from 7.30 percent from the previous year.

The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 10.12 percent in 2024, which increases from approximately 7.72 percent from 2023.

Table 46 Summary of the ASEAN soybean situation, 2023 – 2024

Items	2023	2024	Unit: Million tons	
			Change	
			Quantity	%
Supply (Million tons)	9.78	10.27	0.49	5.01
Beginning stock	0.68	0.91	0.23	33.82
Production	0.64	0.68	0.04	6.25
Import	8.45	8.68	0.23	2.72
Demand (Million tons)	9.78	10.27	0.49	5.01
Domestic utilization	8.83	9.00	0.17	1.93
Export	0.04	0.04	0.00	0.00
Ending stock	0.91	1.23	0.32	35.16
Ratio of production to domestic utilization (%)	7.30	7.55	-	-
Ratio of beginning stock to domestic utilization (%)	7.72	10.12	-	-

ASEAN Soybean Situation 2023

► **Production**

*The estimate of soybean production in ASEAN in 2023 (crop year 2022/23) was 0.64 million tons, an increase of 0.50 million tons from 0.59 million tons in 2022 (crop year 2022/23). The increase in production was due to the increase in yield. **Indonesia** is ranked first in soybean production in the region, followed by Myanmar, Vietnam, Cambodia, Thailand, Lao PDR, and the Philippines. The production of soybean decreased in Thailand (Table 47-50, Figure 47-50).*

For **Cambodia**, the increase in production was due to the increase in planted and harvested areas.

For **Indonesia**, the estimated soybean production in 2023 has increased to 0.34 million tons, increasing approximately 11.23 percent from 0.30 million tons in 2022. The increase in production is attributed to the increase in yield. The increasing in yield caused by favorable weather and farmers took care of the soybean crop better.

For **Lao PDR**, the increase in production was due to the increase in planted area and harvested area, and yield, which caused by farmers' response to the price increase.

For **Myanmar**, the second-largest soybean producing country in ASEAN, the production has increased due to the raise of the planted area and harvested areas. The increase in the planted area came from high production costs.

For the **Philippines**, the increase in production was due to the increase in planted and harvested areas, and yield, which caused by farmers took better care of the soybean crops and using more fertilizer.

For **Vietnam**, the increase in production was due to the increase in planted area and harvested area, and yield, which caused by farmers' response to price increases together with government policy.

For **Thailand**, the decrease in production was due to the decrease in planted area and harvest area, which caused by farmers' response to price decreases and drought

► **Utilization and Stock**

The domestic utilization of soybean in ASEAN in 2023 was estimated at 8.83 million tons, an increase of 0.28 million tons or about 3.22 percent from 8.55 million tons in 2022. While the beginning stock was estimated at 0.68 million tons in 2023, an increase by 0.12 million tons or 20.56 percent from 0.56 million tons in 2022. Indonesia had the greatest soybean stock in the region, followed by Myanmar (Table 52-53).

The ratio of production to domestic utilization (**self-sufficiency ratio**) of ASEAN in 2023 was 7.30 percent, which increased by approximately 0.35 percent from the previous year. (Table 55, Figure 58). The ratio of the beginning stock to the domestic utilization (**food security ratio**) of ASEAN in 2023 was estimated to be 7.72 percent, which raise from the previous year (Table 56, Figure 59).

Overall, despite soybean production in ASEAN was increased, the production volume was considered insufficient for consumption within the ASEAN region. As a result, many ASEAN countries still rely heavily on soybean import and still have a tendency to increase soybean imports. Even though soybean is not an important crop for consumption in ASEAN region, it is still crucial as it is raw material for animal feed and cooking oil production because the population need to consume a variety of products resulted from the economic growth.

As mentioned before, the impact from Russia-Ukraine war has led to the increasing prices of fertilizer and shortage, high energy prices, and increasing price of food. This situation also affects soybean producing countries in ASEAN region and could possibly lead to soybean shortage or food insecurity in the future.

► **Trade**

In 2023, ASEAN altogether exported soybean 38,054 tons, which decreased 1,783 tons compared to 39,837 tons in 2022 (Table 52-53, Figure 51-52).

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

► **Prices**

The monthly FOB price of soybean for exporting countries during 2022-2023 are shown in Table 59 and the monthly CIF prices for importing countries are shown in Table 60. The annual average FOB prices in 2023 in Myanmar (January-April) was 889 US\$/ton, and in Indonesia (January-March) was 404 US\$/ton (Table 59, Figure 60).

For CIF prices of 2023, the annual average in Thailand (January-April) was 661 US\$/ton, in Indonesia was 674 US\$/ton, in Lao PDR was 465 US\$/ton, and in Singapore was 960 US\$/ton (Table 60, Figure 61).

► **Damaged Area**

The total damaged area of soybean in the ASEAN in 2023 was estimated to be 43 hectares. The major cause of damage was flood, which constituted about 72.09 percent of the overall damaged area. The majority of flood areas had occurred in Thailand followed by Cambodia (Table 51).

Prospects for Soybean in 2024

► *Production*

Soybean production of ASEAN in 2024 is forecast to be 0.68 million tons, which increase from 2023 approximately 5.38 percent (Table 47, Figure 47). The increase in production is expected in Indonesia, Lao PDR, Myanmar, and the Philippines. While the decrease in production is expected in Cambodia and Thailand. Indonesia, the biggest soybean-producing country in ASEAN, is forecast to increase in its production from 0.34 million tons in 2023 to 0.36 million tons in 2024. The increase in Indonesian production is derived from the increasing in planted area and harvested area (Table 47-50, Figure 47-50). The decrease in production is also expected in Cambodia and Thailand, which is mainly caused by the reduction of the planted and harvested areas.

► *Utilization and Stock*

The domestic utilization of soybeans in ASEAN is forecast to increase by 1.93 percent from 8.83 million tons in 2023 to 8.99 million tons in 2024 (Table 53-54).

The beginning stock in ASEAN in 2024 is forecast to increase by 0.23 million tons or about 33.50 percent from 0.68 million tons in 2023 to 0.91 million tons in 2024 (Table 53-54).

On the contrary, the ending stock in ASEAN in 2024 is forecast to increase from 0.91 million tons in 2023 to 1.23 million tons, which increases about 3.27 percent (Table 53-54, Figure 57).

In 2024, the ratio of production to domestic utilization (**self-sufficiency ratio**) is forecast to be 7.55 percent, which increases from 7.30 percent in 2023 (Table 55, Figure 58). The ratio of beginning stock to the domestic utilization (**food security ratio**) is forecast to be 10.12 percent, which increases 2.40 percent from the previous year (Table 56, Figure 59).

► *Trade*

In 2024, the export of soybeans from the ASEAN is forecast to 37,140 tons, decreasing 914 tons or 2.40 percent compared to the previous year. While the total import by the ASEAN in 2024 is forecast to be 8.68 million tons, increasing 0.23 million tons from 8.45 million tons in 2023 (Table 53-54, Figure 51, 53, 54, and 56).

Table 47 Soybean production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022(2021/22)	2023(2022/23)	change2023 over 2022		2024(2023/24)	change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	594.73	644.33	49.60	8.34	679.02	34.69	5.38
Brunei	N/A						
Cambodia	19.35	27.23	7.88	40.72	26.50	-0.73	-2.67
Indonesia	301.52	335.37	33.85	11.23	363.31	27.94	8.33
Lao PDR	4.75	6.30	1.56	32.77	6.45	0.15	2.35
Malaysia	N/A						
Myanmar	195.62	198.93	3.31	1.69	206.34	7.41	3.73
Philippines	0.41	0.67	0.26	62.53	1.00	0.33	48.91
Singapore	N/A						
Thailand	20.94	20.61	-0.33	-1.59	20.20	-0.41	-2.00
Vietnam	52.14	55.22	3.08	5.91	55.22	0.00	0.00

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

Table 48 Soybean planted area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022(2021/22)	2023(2022/23)	change2023 over 2022		2024(2023/24)	change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	369.95	337.43	-32.52	-8.79	398.17	60.75	18.00
Brunei	N/A						
Cambodia	11.55	17.18	5.63	48.72	16.78	-0.40	-2.33
Indonesia	180.92	138.53	-42.39	-23.43	196.60	58.07	41.92
Lao PDR	1.94	2.56	0.62	32.23	2.60	0.04	1.56
Malaysia	N/A						
Myanmar	130.08	132.25	2.17	1.66	135.37	3.12	2.36
Philippines	0.30	0.46	0.17	55.67	0.72	0.26	55.67
Singapore	N/A						
Thailand	12.76	12.45	-0.31	-2.45	12.10	-0.35	-2.79
Vietnam	32.40	34.00	1.60	4.94	34.00	0.00	0.00

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

Table 49 Soybean harvested area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022(2021/22)	2023(2022/23)	change2023 over 2022		2024(2023/24)	change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	369.73	337.39	-32.34	-8.75	397.77	60.38	17.90
Brunei	N/A						
Cambodia	11.54	17.18	5.64	48.86	16.50	-0.68	-3.96
Indonesia	180.92	138.53	-42.39	-23.43	196.60	58.07	41.92
Lao PDR	1.94	2.56	0.62	32.23	2.60	0.04	1.56
Malaysia	N/A						
Myanmar	129.93	132.25	2.32	1.79	135.28	3.03	2.29
Philippines	0.30	0.46	0.17	55.67	0.72	0.26	55.67
Singapore	N/A						
Thailand	12.71	12.41	-0.29	-2.31	12.07	-0.34	-2.76
Vietnam	32.40	34.00	1.60	4.94	34.00	0.00	0.00

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

Table 50 Soybean yield in ASEAN countries, 2022 – 2024

Country	2022(2021/22)	2023(2022/23)	change2023 over 2022		2024(2023/24)	change2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	1.61	1.91	0.30	18.72	1.71	-0.20	-10.61
Brunei	N/A						
Cambodia	1.68	1.58	-0.09	-5.47	1.61	0.02	1.34
Indonesia	1.67	2.42	0.75	45.27	1.85	-0.57	-23.67
Lao PDR	2.45	2.46	0.01	0.41	2.48	0.02	0.77
Malaysia	N/A						
Myanmar	1.51	1.50	0.00	-0.10	1.53	0.02	1.40
Philippines	1.39	1.45	0.06	4.41	1.39	-0.06	-4.34
Singapore	N/A						
Thailand	1.65	1.66	0.01	0.74	1.67	0.01	0.78
Vietnam	1.61	1.62	0.01	0.92	1.62	0.00	0.00

Unit: Tons/Hectares

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 51 Soybean damaged area in ASEAN by cause of damage, 2023**

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Others	Unspecify	
ASEAN	31	12	-	-	-	-	43
Brunei	-	-	-	-	-	-	-
Cambodia	11	-	-	-	-	-	11
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	1	-	-	-	-	-	1
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	19.00	12.00	-	-	-	-	31.00
Vietnam	-	-	-	-	-	-	-

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

Table 52 Soybean balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	565,635	594,731	8,114,723	9,275,088	8,553,310	39,837	681,941	9,275,088
Brunei			612	612	612		0	612
Cambodia		19,350	5,877	25,227	19,227	6,000	0	25,227
Indonesia	190,970	301,518	2,324,731	2,817,219	2,469,270	11,373	336,576	2,817,219
Lao PDR	1,860	4,745	840	7,445	4,839	1,867	739	7,445
Malaysia	*68,000		722,758	790,758	*717,467	9,291	*64,000	790,758
Myanmar	194,598	195,620	1,023	391,241	204,918	362	185,961	391,241
Philippines	10,000	*414	175,586	186,000	175,000		11,000	186,000
Singapore			22,812	22,812	21,932	879	0	22,812
Thailand		*20,943	3,022,180	3,043,123	3,042,047	935	*141	3,043,123
Vietnam	100,207	52,140	1,838,305	1,990,652	1,897,998	9,130	83,524	1,990,652

Remark: * The value is estimated by AFSIS Secretariat.

Table 53 Soybean balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	681,941	644,329	8,450,961	9,777,231	8,828,786	38,054	910,391	9,777,231
Brunei			630	630	630		0	630
Cambodia	0	27,229	*2,939	30,168	18,076	*12,092	0	30,168
Indonesia	336,576	335,367	2,404,000	3,075,942	2,495,565	5,467	574,911	3,075,942
Lao PDR	739	6,300	62	7,101	4,615		2,485	7,101
Malaysia	*64,000		*794,817	858,817	*787,176	*9,641	*62,000	858,817
Myanmar	185,961	198,928	162	385,051	203,451	864	180,736	385,051
Philippines	11,000	*674	185,326	197,000	190,000		7,000	197,000
Singapore			22,554	22,554	22,464	90	0	22,554
Thailand	*141	20,611	3,100,000	3,120,752	3,119,361	900	*491	3,120,752
Vietnam	83,524	55,220	1,940,471	2,079,215	1,987,447	9,000	82,768	2,079,215

Remark: * The value is estimated by AFSIS Secretariat.

Table 54 Soybean balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	910,391	679,016	8,677,361	10,266,767	8,999,220	37,140	1,230,407	10,266,767
Brunei			649	649	649		0	649
Cambodia		26,501	*2,576	29,077	18,878	*10,199	0	29,077
Indonesia	574,911	363,306	2,404,000	3,342,216	2,525,982	5,467	810,767	3,342,216
Lao PDR	2,485	6,448		8,933	5,807		3,127	8,933
Malaysia	*62,000		*807,216	869,216	*799,211	*10,005	*60,000	869,216
Myanmar	180,736	206,340		387,076	204,531	967	181,578	387,076
Philippines	*7,000	*1,003	195,606	203,609	195,000		*8,609	203,609
Singapore			22,683	22,683	22,198	485	0	22,683
Thailand	*491	*20,198	*3,200,000	3,220,689	*3,150,000	*918	*69,771	3,220,689
Vietnam	82,768	55,220	2,044,631	2,182,619	2,076,964	9,100	96,555	2,182,619

Remark: * The value is estimated by AFSIS Secretariat.

Table 55 Ratio of soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	594,731	8,553,310	6.95	644,329	8,828,786	7.30	679,016	8,999,220	7.55
Brunei	0	612	0.00	0	630	0.00	0	649	0.00
Cambodia	19,350	19,227	100.64	27,229	18,076	150.64	26,501	18,878	140.38
Indonesia	301,518	2,469,270	12.21	335,367	2,495,565	13.44	363,306	2,525,982	14.38
Lao PDR	4,745	4,839	98.05	6,300	4,615	136.50	6,448	5,807	111.05
Malaysia	0	717,467	0.00	0	787,176	0.00	0	799,211	0.00
Myanmar	195,620	204,918	95.46	198,928	203,451	97.78	206,340	204,531	100.88
Philippines	414	175,000	0.24	674	190,000	0.35	1,003	195,000	0.51
Singapore	0	21,932	0.00	0	22,464	0.00	0	22,198	0.00
Thailand	20,943	3,042,047	0.69	20,611	3,119,361	0.66	20,198	3,150,000	0.64
Vietnam	52,140	1,897,998	2.75	55,220	1,987,447	2.78	55,220	2,076,964	2.66

Remark: * The value is estimated by AFSIS Secretariat.

[57]

Table 56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	565,635	8,553,310	6.61	681,941	8,828,786	7.72	910,391	8,999,220	10.12
Brunei	0	612	0.00	0	630	0.00	0	649	0.00
Cambodia	0	19,227	0.00	0	18,076	0.00	0	18,878	0.00
Indonesia	190,970	2,469,270	7.73	336,576	2,495,565	13.49	574,911	2,525,982	22.76
Lao PDR	1,860	4,839	38.44	739	4,615	16.01	2,485	5,807	42.80
Malaysia	68,000	717,467	9.48	64,000	787,176	8.13	62,000	799,211	7.76
Myanmar	194,598	204,918	94.96	185,961	203,451	91.40	180,736	204,531	88.37
Philippines	10,000	175,000	5.71	11,000	190,000	5.79	7,000	195,000	3.59
Singapore	0	21,932	0.00	0	22,464	0.00	0	22,198	0.00
Thailand	0	3,042,047	0.00	141	3,119,361	0.00	491	3,150,000	0.02
Vietnam	100,207	1,897,998	5.28	83,524	1,987,447	4.20	82,768	2,076,964	3.99

Remark: * The value is estimated by AFSIS Secretariat.

Table 57 Quantity and Value of Soybean Export by Countries of Destination in 2023

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									2	3,127				
Lao PDR														
Malaysia	11	11,360			2,211	1,787,270					26	2,960		
Myanmar														
Philippines														
Singapore														
Thailand			5	7,699			38	14,429	0.14	452	131	69,910		
Vietnam				243,846				40,095						

[58]

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei							0	0			0	0
Cambodia							0	0			0	0
Indonesia							2	3,127	824	351,122	825	354,249
Lao PDR							0	0			0	0
Malaysia	4	14,532	6	6,013			2,257	1,822,136	956	189,298	3,214	2,011,434
Myanmar							0	0	864	957,000	864	957,000
Philippines							0	0			0	0
Singapore							0	0			0	0
Thailand	4	8,837					178	101,327	1	2,806	179	104,134
Vietnam							0	283,941		9,296	0	293,237

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

Table 58 Quantity and Value of Soybean Import by Countries of Origin in 2023

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									1,782	1,148,544				
Lao PDR														
Malaysia					1	18,380								
Myanmar														
Philippines														
Singapore									1,262	1,875,080	0	36		
Thailand									6	7,039				
Vietnam			320	251,300										

[59]

Importing Country	Country of origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei							0	0			0	0
Cambodia							0	0			0	0
Indonesia			0.001	12	2	3,604	1,784	1,152,160	879,895	595,222,211	881,679	596,374,371
Lao PDR			14	3,852	8	5,810	22	9,662	39	19,664	61	29,326
Malaysia	0	128				180,366	180,366	615,905	264,632	173,633,867	444,999	174,249,772
Myanmar	8.25	6,000					8	6,000	154	141,000	162	147,000
Philippines							0	0	38,404	27,130,014	38,404	27,130,014
Singapore							1,262	1,875,116	21,291	19,762,335	22,553	21,637,451
Thailand			1	1,298	0	14	7	8,351	729,697	484,493,482	729,704	484,501,833
Vietnam							320	251,300	736,471	501,339,429	736,791	501,590,729

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

Table 59 FOB Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2022													
	2023													
Indonesia	2022	777	500	312	496	273	1,357	700	455	726	500	691	672	622
	2023	446	402	365										404
Lao PDR	2022	280	322	352	371	384	387	270	210	210	200	220	210	285
	2023													
Malaysia	2022	664	775	792	827	905	799	1,088	912	783	789	903	992	852
	2023	863	842	850	703									815
Myanmar	2022	730	742		955							570		749
	2023		879	943	844									889

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

Table 60 CIF Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	568	586	662	695	711	754	755	758	738	767	758	677	702
	2023	666	670	685										674
Lao PDR	2022	490	496	545	588	590	598	590	510	540	530	510	510	541
	2023	458	455	482										465
Malaysia	2022	616	576	637	676	721	752	739	753	762	464	721	699	676
	2023	670	600	705	665									660
Myanmar	2022	847		850	858	1001	1096		1111		1095	1111	1115	1,009
	2023	1140	1162	1115	1039									1,114
Singapore	2022	890	881	899	905	969	941	939	969	923	966	909	938	927
	2023	994	934	962	962	949	960	960	960	960	960	960	960	960
Thailand	2022	593.71	595.24	560.52	568.90	624.71	638.27	678.79	734.83	703.46	693.98	760.85	731.90	657
	2023	693.02	658.76	665.32	628.34									661
Vietnam	2022	608	626	687	723	732	738	755	751	702	682	692	677	698
	2023	672	717	677	651	417								627

Million Tons

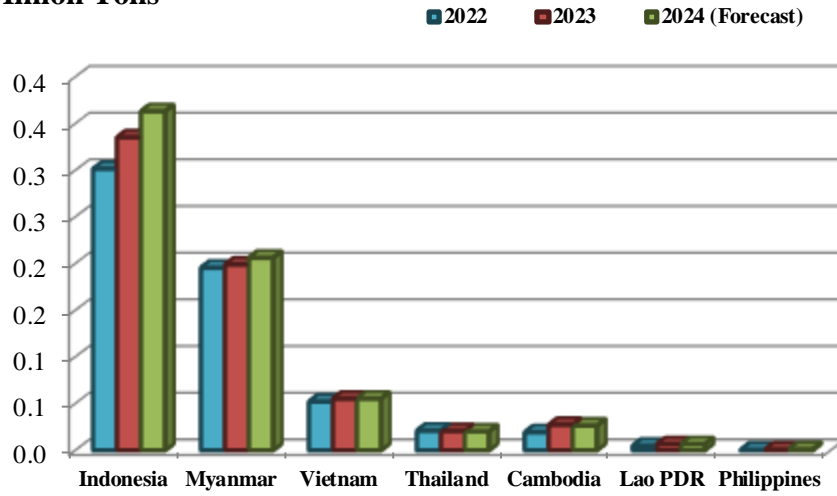


Figure 47 Soybean production of selected countries in ASEAN, 2022 – 2024

Million Ha

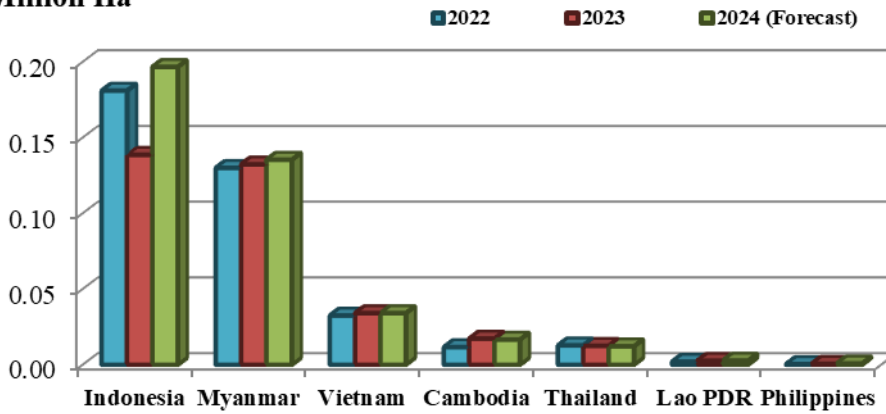


Figure 48 Soybean planted area of selected countries in ASEAN, 2022 – 2024

Million Ha

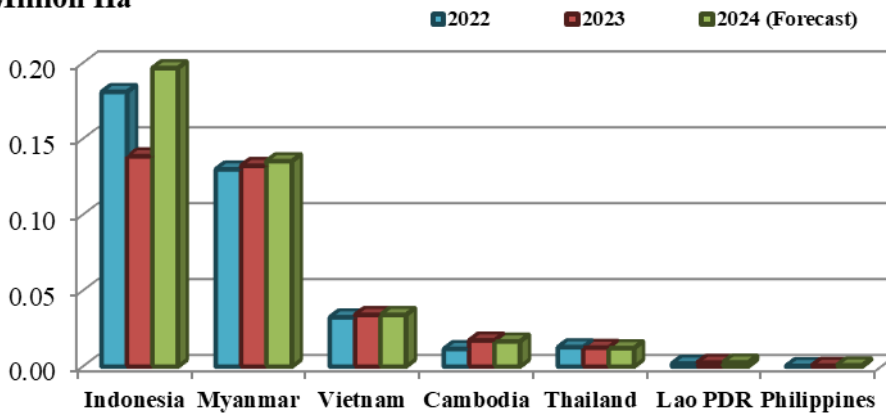


Figure 49 Soybean harvested area of selected countries in ASEAN, 2022 – 2024

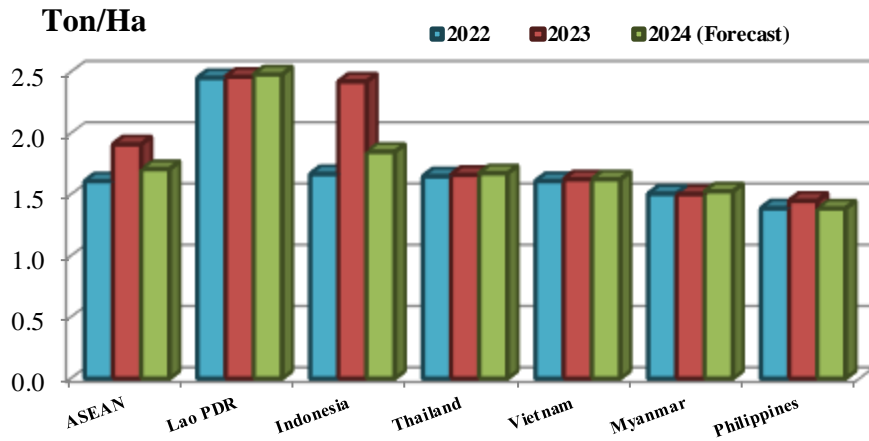


Figure 50 Soybean yield of countries in ASEAN, 2022 – 2024

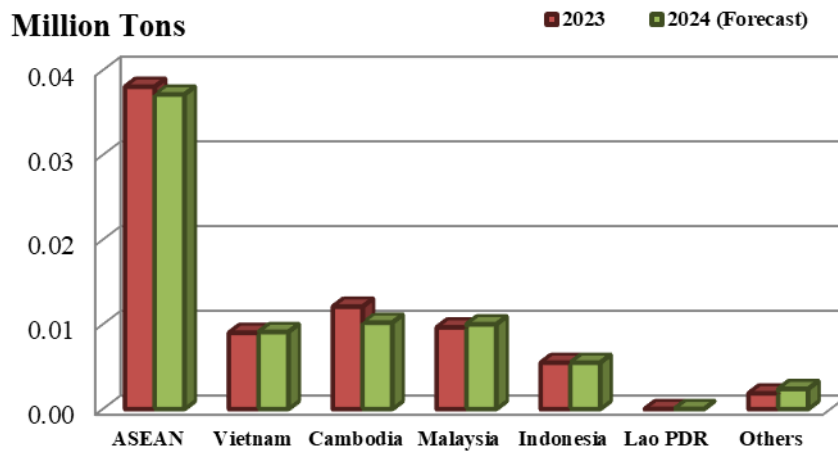
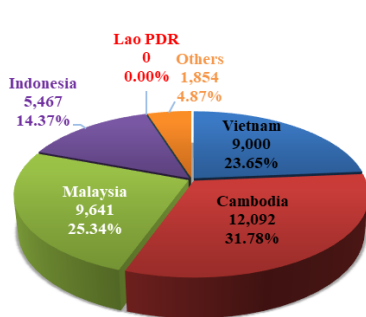
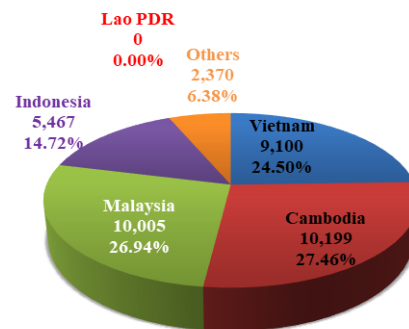


Figure 51 Amount of soybean export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 0.038 million tons

Figure 52 Share of soybean export (tons) among ASEAN countries, 2023



Total 0.037 million tons

Figure 53 Share of soybean export (tons) among ASEAN countries, 2024

Million Tons

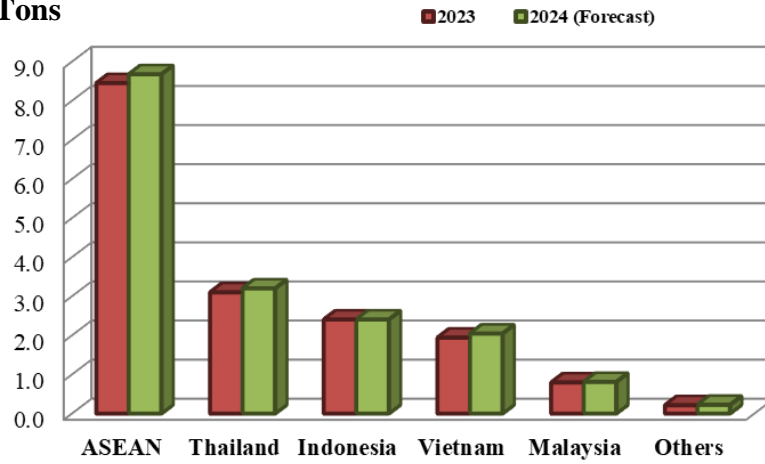
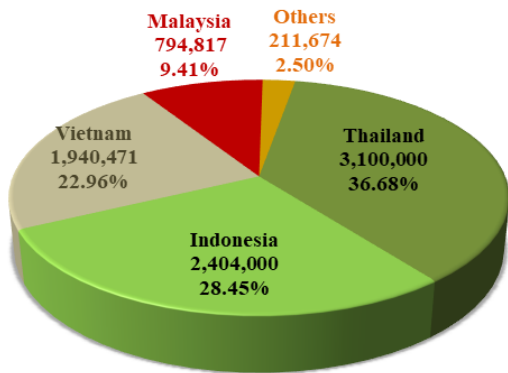
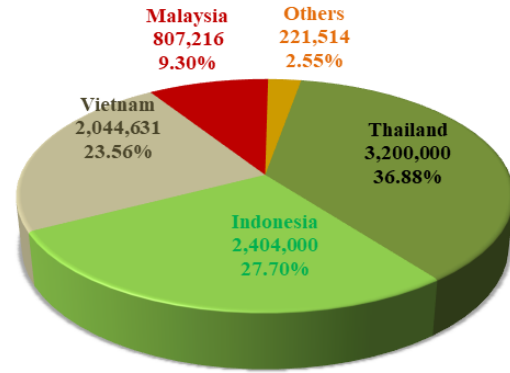


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2022 – 2024



Total 8.45 million tons

Figure 55 Share of soybean import (tons) among ASEAN countries, 2023



Total 8.68 million tons

Figure 56 Share of soybean import (tons) among ASEAN countries, 2024

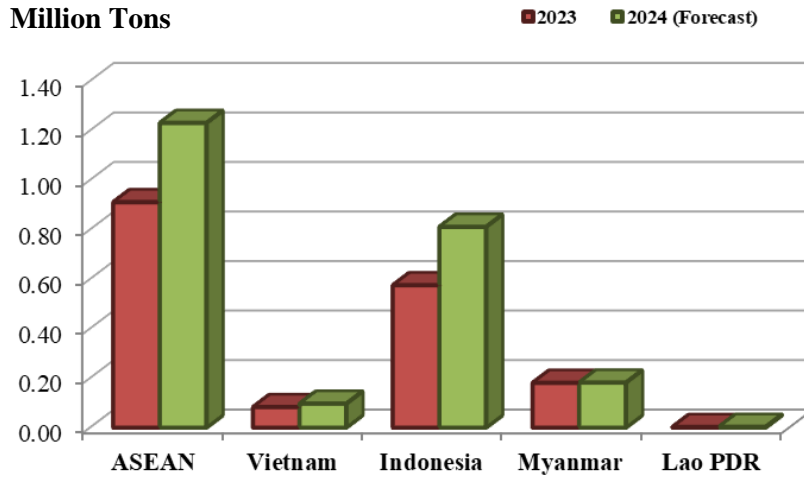


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2023 – 2024

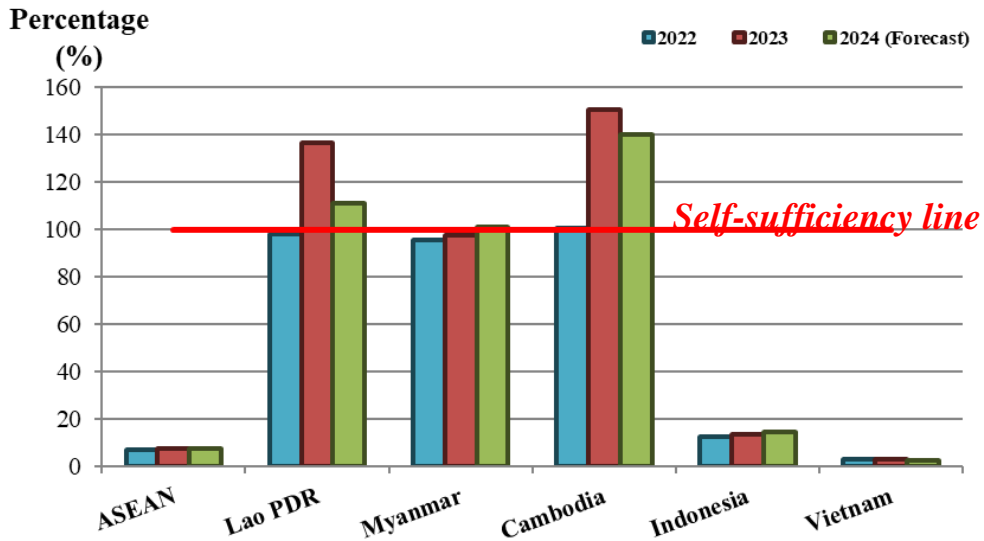


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2022 – 2024

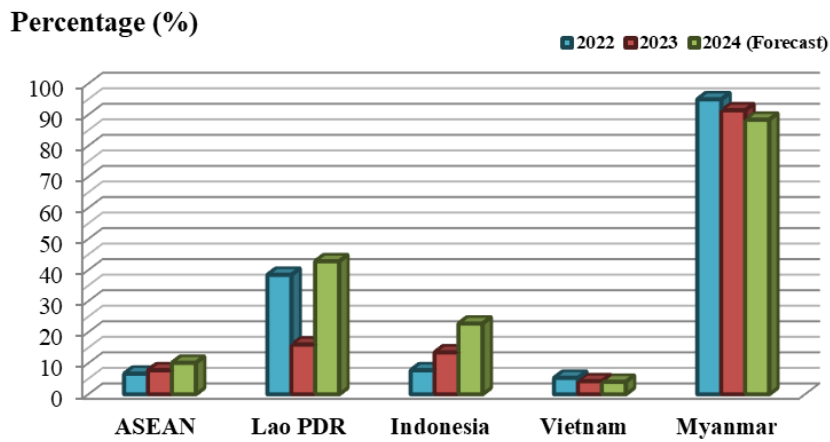


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

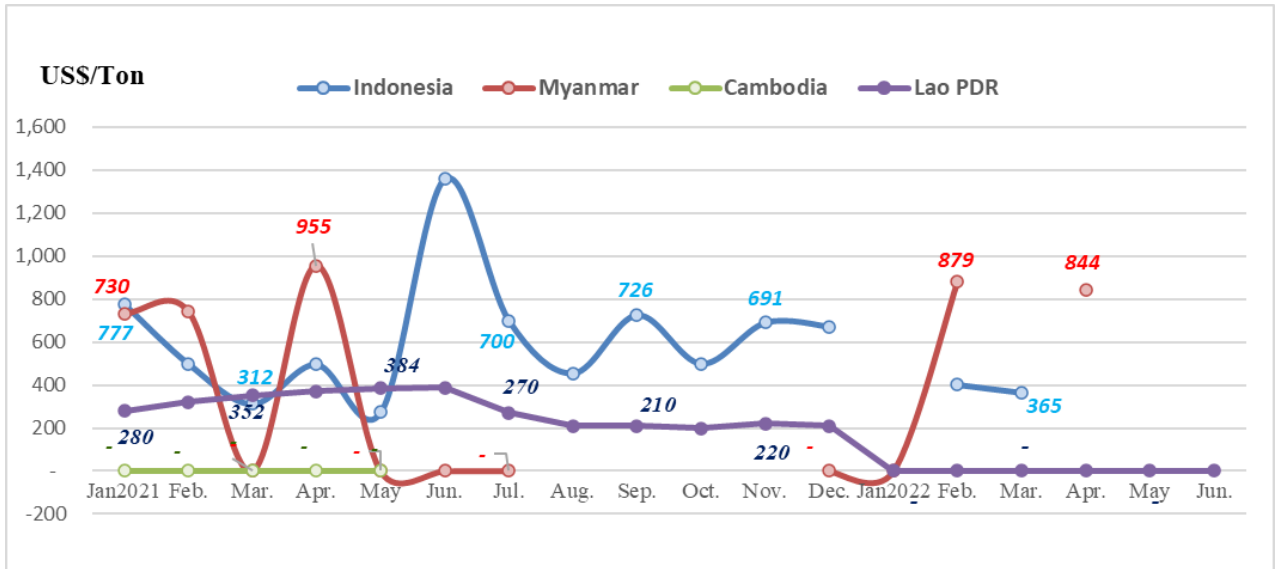
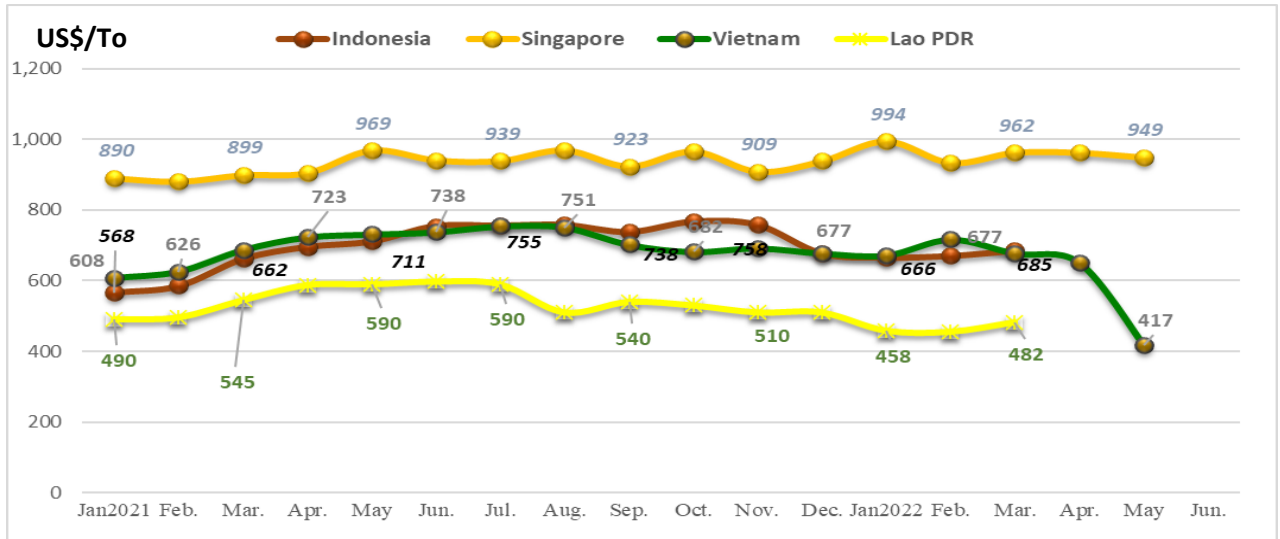


Figure 60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 2022 – 2023



Cassava Outlook for 2024

Highlights

In 2024, the supply of cassava in ASEAN is forecast to be 112.62 million tons, an increase of 1.48 million tons or about 1.33 percent from 111.14 million tons in 2023 (Table 61). The rise in supply is due to the increase in beginning stock and production.

The beginning stock of cassava in 2024 is projected to be 12.92 million tons, which increases from 11.90 million tons in 2023 due to the increase in stock in Cambodia, Thailand and Vietnam (Table 61, 68-69). While the ending stock in 2024 is expected to reach 15.58 million tons, which increases from 12.92 million tons in 2023 (Table 61).

The export of cassava is expected to decrease by 2.39 million tons or around 5.51 percent from 43.37 million tons in 2023 to 40.98 million tons in 2024. In addition, the import of cassava is forecast to be 14.77 million tons in 2024, which decreases about 12.50 percent from 16.88 million tons in 2023 (Table 61).

The ratio of production to domestic utilization (self-sufficiency ratio) in 2024 is forecast to be 151.46 percent, which increases about 1.30 percent from 150.16 percent in 2023. The ratio of beginning stock to domestic utilization (food security ratio) in 2024 is forecast to be 23.05 percent, which increases about 1.35 percent from 21.70 percent in 2023 (Table 61).

Table 61 Summary of the ASEAN cassava situation, 2023-2024

Unit: Million tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	111.14	112.62	1.48	1.33
Beginning stock	11.90	12.92	1.02	8.57
Production	82.36	84.93	2.57	3.12
Import	16.88	14.77	-2.11	-12.50
Demand (Million tons)	111.14	112.62	1.48	1.33
Domestic utilization	54.85	56.07	1.22	2.22
Export	43.37	40.98	-2.39	-5.51
Ending stock	12.92	15.58	2.66	20.59
Ratio of production to domestic utilization (%)	150.16	151.46	1.30	-
Ratio of beginning stock to domestic utilization (%)	21.70	23.05	1.35	-

ASEAN Cassava Situation in 2023

► *Production*

The estimated cassava production (root fresh) in ASEAN in 2023 (crop year 2022/23) was 82.35 million tons, which increased from 82.14 million tons in 2022 or about 0.27 percent. The increase has occurred in Cambodia, Indonesia, and Malaysia (Table 62-65, Figure 62-65).

For the country that reported the highest volume in production, **Thailand**, the production was reported to decrease about 3.93 percent or 1.33 million tons (from 34.07 million tons in 2022 to 32.73 million tons in 2023). The decrease in production came from the decrease in harvested area and yield due to high price completion, unfavorable weather and flood.

For **Myanmar**, the decrease in production was approximately 20.77 percent or 0.07 million tons (from 0.33 million tons in 2022 to 0.26 million tons in 2023). The decrease in production was attributed to decrease in planted area and harvested area.

For **Cambodia**, the production was reported to increase about 6.81 percent or 0.97 million tons (from 14.26 million tons in 2022 to 15.23 million tons in 2023). The increase in production came from the increase in planted area and harvested area.

For **Indonesia**, the production was reported to increase by 9.41 percent or 1.41 million tons (from 14.95 million tons in 2022 to 16.36 million tons in 2023). The increase in production came from the increase in planted area and harvested area caused by the farmer response to price increase.

For **Lao PDR**, the production was reported to decrease about 10.08 percent or 0.54 million tons (from 5.29 million tons in 2022 to 4.75 million tons in 2023). The decrease in production came from the decrease in planted area and harvested area caused by unfavorable weather

For **Malaysia**, the production was reported to increase about 8.53 percent or 0.03 million tons (from 0.43 million tons in 2022 to 0.46 million tons in 2023). The increase in cassava production was attributed to increase in planted area, harvested area and yield.

For **the Philippines**, the production was reported to slight decrease by 0.31 percent or 0.08 million tons (from 2.55 million tons in 2022 to 2.54 million tons in 2023). The decrease in cassava production was attributed to decrease in yield because unfavorable weather.

For **Vietnam**, the decrease in production was approximately 2.02 percent or 0.21 million tons (from 10.65 million tons in 2022 to 10.43 million tons in 2023). The decrease in production was due to the decrease in planted area and harvested area caused by prices decrease.

► *Utilization and Stock*

Cassava root in ASEAN, in general, it can be used for human food, animal feed, and ethanol production. In 2023, the domestic utilization of cassava for all purposes in ASEAN was estimated at 54.85 million tons, which decreased by 0.78 million tons or about 1.41 percent from 55.63 million tons in 2022 (Table 67-68).

The beginning stock in 2023 was estimated at 11.90 million tons, which decreased sharply around 3.87 million tons compared to 15.77 million tons in 2022. The ending stock of cassava in 2022 was estimated to be 11.90 million tons, which increased around 1.02 million tons compared to 12.92 million tons in 2023. This came from the increase in ending stock of Cambodia, Thailand and Vietnam.

The ratio of production to domestic utilization (self-sufficient ratio) in 2023 was estimated to be 150.16 percent, which increased from 147.64 percent in 2022. **This indicated that, aggregately, the cassava production in ASEAN is sufficient for the demand within ASEAN** (Table 70, Figure 73).

In 2023, the ratio of the ASEAN beginning stock to domestic utilization (food security ratio) is estimated to be 21.70 percent, which decreased from 28.35 percent in 2022 (Table 71, Figure 74).

For the overall production, the information of cassava in ASAEAN demonstrates that many countries in the region have self-dependency in terms of cassava production and have food security. Cassava is not a staple food for the ASEAN region; however, it is an important raw material used in animal feed and energy. For the current food crisis, some countries in ASEAN region that have excessive cassava supply can be advantages from cassava export and obtain high revenue from the export.

► **Trade**

The cassava exported from ASEAN in 2023 is expected to be 43.37 million tons, which decreased 0.48 million tons from 43.86 million tons in 2022. The cassava imported by ASEAN in 2022 was estimated to be 13.48 million tons, which increased by approximately 3.41 million tons from 16.88 million tons in 2023 (Table 67-68, Figure 66-67, and 69-70).

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

► **Prices**

The FOB prices of cassava in Indonesia, Lao PDR, Malaysia, Myanmar, Thailand, and Vietnam between 2022 and 2023, and the CIF prices of Indonesia, Malaysia, and Singapore are presented in Table 74-75. The average FOB prices of starch, pellets, and shredded in Thailand in 2023 increased from 2022.

► **Damaged Area**

In 2023, the cassava damaged area in ASEAN was reported to be 205,616 hectares, of which 199,362 hectares or about 96.96 percent occurred in Thailand (Table 66).

Prospects for Cassava in 2024

► **Production**

The cassava production in ASEAN in 2024 is forecast to be 84.93 million tons, which increases by 0.26 million tons or about 3.12 percent from 82.36 million tons in 2023. The increase in production is expected in Brunei, Indonesia, Malaysia, Myanmar and Thailand (Table 62). The greatest increase in terms of quantity is expected in Indonesia, which is forecast to be 18.52 million tons or an increase by 13.25 percent from 16.36 million tons in 2023 by increasing in yield. The rising in yield is due to weather and improved plant care lead to increased. (Table 62-65, Figure 62-65).

*The decrease in production in **Cambodia**, which is forecast to be 14.85 million tons or a decrease by 2.53 percent from 15.24 million tons in 2023, is due to the decrease in planted area, harvested area and yield.*

*The decrease in production in **Lao PDR**, which is forecast to be 4.67 million tons or a decrease by 1.73 percent from 4.75 million tons in 2023, is due to the decrease in yield.*

*The decrease in production in **Vietnam**, which is forecast to be 10.22 million tons or a decrease by 2.00 percent from 10.43 million tons in 2023, is due to the decrease in planted and harvested area. The causes from the price decrease and using less fertilizer.*

*The increase in production in **Myanmar**, which is forecast to be 0.31 million tons or an increase by 16.74 percent from 0.26 million tons in 2023, is due to the increase in harvested areas.*

*The decrease in production in **the Philippines**, which is forecast to be 2.54 million tons or an increase by 0.30 percent from 2.55 million tons in 2023, is due to the decrease in yield.*

*The increase in production in **Malaysia**, which is forecast to be 0.05 million tons or an increase by 8.53 percent from 0.05 million tons in 2023, is due to the increase in planted area, harvested area, and yield.*

► **Utilization and Stock**

The domestic utilization of cassava is predicted to increase to 56.07 million tons in 2024 compared to 54.85 million tons in 2023, an increase by 1.22 million tons. The beginning stock in 2024 is forecast to be 12.92 million tons, an increase by 1.02 million tons, compared to 11.90 million tons in 2023. The ending stock in 2024 is predicted to be 15.58 million tons, an increase of 2.65 million tons from 12.92 million tons in 2023 (Table 68-69).

The ratio of production to domestic utilization (**self-sufficient ratio**) for 2024 is forecast to be 151.46 percent, which increases from 150.16 percent in 2023. This indicates that the self-sufficiency in cassava in ASEAN is slightly increasing (Table 70, Figure 73). The ratio of beginning stock to the domestic utilization (**food security ratio**) in 2024 is predicted to be 23.05 percent, compared to 21.70 percent in 2023. This indicates that the cassava supply situation in ASEAN is increasing (Table 71, Figure 74).

► **Trade**

The cassava export from ASEAN is expected to decrease to 40.98 million tons in 2024, a decrease by 2.39 million tons compared to 43.37 million tons in 2023. For the import, it is estimated to be 14.77 million tons in 2024, a decrease about 2.11 million tons from 16.88 million tons in 2023 (Table 68-69, Figure 66, 68, 69, and 71).

Table 62 Cassava production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	82,138.94	82,357.93	218.99	0.27	84,925.09	2,567.16	3.12
Brunei	0.374	0.374	0.00	0.00	0.40	0.03	7.89
Cambodia	14,259.07	15,230.55	971.47	6.81	14,844.81	-385.73	-2.53
Indonesia	14,951.35	16,357.67	1,406.32	9.41	18,524.55	2,166.88	13.25
Lao PDR	5,286.00	4,753.00	-533.00	-10.08	4,671.00	-82.00	-1.73
Malaysia	42.75	46.39	3.65	8.53	50.35	3.96	8.53
Myanmar	331.53	262.68	-68.85	-20.77	306.66	43.98	16.74
Philippines	2,553.41	2,545.61	-7.80	-0.31	2,538.02	-7.59	-0.30
Singapore	N/A						
Thailand	34,068.01	32,729.95	-1,338.06	-3.93	33,766.21	1,036.27	3.17
Vietnam	10,646.45	10,431.72	-214.74	-2.02	10,223.08	-208.63	-2.00

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

Table 63 Cassava planted area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	4,016.99	4,078.96	61.97	1.54	3,907.68	-171.28	-4.20
Brunei	N/A						
Cambodia	752.98	784.17	31.18	4.14	778.03	-6.13	-0.78
Indonesia	549.23	627.28	78.06	14.21	603.69	-23.59	-3.76
Lao PDR	194.90	147.10	-47.80	-24.53	149.20	2.10	1.43
Malaysia	2.73	2.82	0.08	3.00	2.90	0.08	3.00
Myanmar	33.49	23.08	-10.41	-31.09	23.00	-0.08	-0.35
Philippines	215.63	218.29	2.66	1.23	221.00	2.70	1.24
Singapore	N/A						
Thailand	1,737.92	1,756.71	18.80	1.08	1,620.75	-135.97	-7.74
Vietnam	530.11	519.51	-10.60	-2.00	509.12	-10.39	-2.00

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

Table 64 Cassava harvested area in ASEAN countries, 2022 – 2024

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	3,820.86	3,873.34	52.48	1.37	3,907.28	33.94	0.88
Brunei	N/A						
Cambodia	714.20	782.47	68.27	9.56	778.03	-4.44	-0.57
Indonesia	549.23	627.28	78.06	14.21	603.69	-23.59	-3.76
Lao PDR	194.90	147.10	-47.80	-24.53	149.20	2.10	1.43
Malaysia	2.38	2.45	0.07	3.00	2.53	0.07	3.00
Myanmar	27.04	18.89	-8.15	-30.14	22.98	4.09	21.63
Philippines	215.63	218.29	2.66	1.23	221.00	2.70	1.24
Singapore	N/A						
Thailand	1,587.37	1,557.35	-30.02	-1.89	1,620.75	63.40	4.07
Vietnam	530.11	519.51	-10.60	-2.00	509.12	-10.39	-2.00

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

Table 65 Cassava yield in ASEAN countries, 2022 – 2024

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	21.50	21.26	-0.24	-1.12	21.74	0.48	2.26
Brunei	N/A						
Cambodia	19.97	19.46	-0.51	-2.55	19.08	-0.38	-1.95
Indonesia	27.22	26.08	-1.14	-4.19	30.69	4.61	17.68
Lao PDR	27.12	32.31	5.19	19.14	31.31	-1.00	-3.10
Malaysia	17.96	18.92	0.96	5.35	19.93	1.01	5.34
Myanmar	12.26	13.91	1.65	13.46	13.35	-0.56	-4.03
Philippines	11.84	11.66	-0.18	-1.52	11.48	-0.18	-1.54
Singapore	N/A						
Thailand	21.46	21.02	-0.44	-2.05	20.83	-0.19	-0.90
Vietnam	20.08	20.08	0.00	0.00	20.08	0.00	0.00

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

Table 66 Cassava damaged area in ASEAN by cause of damage, 2023

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecify	Total
ASEAN	199,362	-	-	-	-	6,254	205,616
Brunei	N/A						
Cambodia	-	-	-	-	-	1,699	1,699
Indonesia	N/A						
Lao PDR	N/A						
Malaysia	-	-	-	-	-	363	363
Myanmar	-	-	-	-	-	4,191	4,191
Philippines	N/A						
Singapore	N/A						
Thailand	199,362	-	-	-	-	-	199,362
Vietnam	N/A						

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

Table 67 Cassava balance sheet of ASEAN countries, 2022 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	15,770,609	82,137,101	13,481,672	111,389,382	55,631,578	43,856,188	11,901,616	111,389,382
Brunei		374	0.95	375	375		0	375
Cambodia	3,222,506	14,259,072		17,481,578	8,574,467	3,618,486	5,288,625	17,481,578
Indonesia		14,951,350	290,270	15,241,620	15,226,670	14,950	0	15,241,620
Lao PDR	9,101,638	5,286,000		14,387,638	7,913,201	1,446,950	5,027,487	14,387,638
Malaysia		*42,747	*335,022	377,769	*297,769	*80,000	0	377,769
Myanmar	396,179	331,533	24.00	727,736	548,610	6,715	172,411	727,736
Philippines		*2,553,411	*127,523	2,680,934	*2,679,114	*1,820	0	2,680,934
Singapore			1,729	1,729	1,727	1.9	0	1,729
Thailand	*2,629,670	34,068,005	*12,600,000	49,297,675	12,707,000	35,437,000	1,153,675	49,297,675
Vietnam	420,617	10,644,609	127,103	11,192,328	7,682,647	3,250,264	259,418	11,192,328

Remark: * The value is estimated by AFSIS Secretariat.

Table 68 Cassava balance sheet of ASEAN countries, 2023 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	11,901,616	82,357,945	16,883,021	111,142,582	54,847,634	43,370,323	12,924,624	111,142,580
Brunei		384	1.00	385	385			385
Cambodia	5,288,625	15,230,546		20,519,171	8,740,017	3,661,908	8,117,246	20,519,171
Indonesia		16,357,667	111,925	16,469,592	16,376,668	92,924		16,469,592
Lao PDR	5,027,487	4,753,000		9,780,487	5,379,268	1,572,184	2,829,035	9,780,487
Malaysia		*46,393	*343,398	389,791	*307,790	*82,000		389,790
Myanmar	172,411	262,679	154	435,245	385,010	35,731	14,504	435,245
Philippines	-	*2,545,613	*127,000	2,672,613	*2,672,277	*335		2,672,612
Singapore			1,589	1,589	1,586	3		1,589
Thailand	1,153,675	32,729,946	*15,500,000	49,383,621	*13,148,334	*35,000,000	1,235,287	49,383,621
Vietnam	259,418	10,431,717	798,954	11,490,088	*7,836,299	2,925,238	728,551	11,490,088

Remark: * The value is estimated by AFSIS Secretariat.

Table 69 Cassava balance sheet of ASEAN countries, 2024 (Cassava roots fresh)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	12,924,624	84,925,093	14,774,952	112,624,669	56,069,129	40,976,849	15,578,691	112,624,669
Brunei		403	1.05	404	404			404
Cambodia	8,117,246	14,844,812		22,962,058	8,622,947	3,700,358	10,638,753	22,962,058
Indonesia		18,524,545	111,925	18,636,470	18,543,546	92,924		18,636,470
Lao PDR	2,829,035	4,671,000		7,500,035	4,125,019		3,375,016	7,500,035
Malaysia		*50,350	*351,983	402,333	*318,283	*84,050		402,333
Myanmar	14,504	306,664		321,168	284,105	16,612	20,451	321,168
Philippines	0	*2,538,024	*130,000	2,668,025	*2,667,725	*300		2,668,025
Singapore			1,659	1,659	1,656	3		1,659
Thailand	1,235,287	*33,766,212	14,000,000	49,001,499	*13,600,000	*34,000,000	1,401,499	49,001,499
Vietnam	728,551	10,223,082	179,384	11,131,018	7,905,443	3,082,603	142,972	11,131,018

Remark: * The value is estimated by AFSIS Secretariat.

Table 70 Ratio of cassava production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	82,137,101	55,631,578	147.64	82,357,945	54,847,634	150.16	84,925,093	56,069,129	151.46
Brunei	374	375	99.75	384	385	99.74	403	404	99.74
Cambodia	14,259,072	8,574,467	166.30	15,230,546	8,740,017	174.26	14,844,812	8,622,947	172.15
Indonesia	14,951,350	15,226,670	98.19	16,357,667	16,376,668	99.88	18,524,545	18,543,546	99.90
Lao PDR	5,286,000	7,913,201	66.80	4,753,000	5,379,268	88.36	4,671,000	4,125,019	113.24
Malaysia	42,747	297,769	14.36	46,393	307,790	15.07	50,350	318,283	15.82
Myanmar	331,533	548,610	60.43	262,679	385,010	68.23	306,664	284,105	107.94
Philippines	2,553,411	2,679,114	95.31	2,545,613	2,672,277	95.26	2,538,024	2,667,725	95.14
Singapore	-	1,727	0.00	-	1,586	0.00	-	1,656	0.00
Thailand	34,068,005	12,707,000	268.10	32,729,946	13,148,334	248.93	33,766,212	13,600,000	248.28
Vietnam	10,644,609	7,682,647	138.55	10,431,717	7,836,299	133.12	10,223,082	7,905,443	129.32

Remark: * The value is estimated by AFSIS Secretariat.

Table 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2022 – 2024

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	15,770,609	55,631,578	28.35	11,901,616	54,847,634	21.70	12,924,624	56,069,129	23.05
Brunei	-	375	0.00	-	385	0.00	-	404	-
Cambodia	3,222,506	8,574,467	37.58	5,288,625	8,740,017	60.51	8,117,246	8,622,947	94.14
Indonesia	-	15,226,670	0.00	-	16,376,668	0.00	-	18,543,546	-
Lao PDR	9,101,638	7,913,201	115.02	5,027,487	5,379,268	93.46	2,829,035	4,125,019	68.58
Malaysia	-	297,769	0.00	-	307,790	0.00	-	318,283	-
Myanmar	396,179	548,610	72.22	172,411	385,010	44.78	14,504	284,105	5.11
Philippines	-	2,679,114	0.00	-	2,672,277	0.00	0	2,667,725	-
Singapore	-	1,727	0.00	-	1,586	0.00	-	1,656	-
Thailand	2,629,670	12,707,000	20.69	1,153,675	13,148,334	8.77	1,235,287	13,600,000	9.08
Vietnam	420,617	7,682,647	5.47	259,418	7,836,299	3.31	728,551	7,905,443	9.22

Remark: * The value is estimated by AFSIS Secretariat.

Table 72 Quantity and Value of Cassava Export by Countries of Destination in 2023

Quantity: Tons, Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									2.29	912				
Lao PDR														
Malaysia														
Myanmar									68	24,000				
Philippines														
Singapore	N/A													
Thailand	130	83,135	677	642,019	34,478	25,377,683	9,733	4,814,208	61,112	32,246,897	5,799	2,998,368	41,055	23,473,850
Vietnam									5,098	2,504,669				

[74]

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam		Quantity	Values	Quantity	Values	Quantity	Values
	Quantity	Values	Quantity	Values	Quantity	Values						
Brunei	N/A											
Cambodia	N/A											
Indonesia	18.08	26,795					20	27,707	690	1,155,201	710	1,182,908
Lao PDR			1,389,637	191,894,645	181,489	30,819,984	1,571,126	222,714,629	1,059	139,256	1,572,185	222,853,885
Malaysia		95,318						95,318		463		95,781
Myanmar			35,663	5,004,000			35,731	5,028,000			35,731	5,028,000
Philippines							-	-	335	461,140	335	461,140
Singapore	N/A											
Thailand	21,267	10,419,356			9,726	7,646,115	183,977	107,701,631	3,026,086	1,035,275,172	3,210,063	1,142,976,803
Vietnam							5,098	2,504,669	1,172,340	450,184,571	1,177,438	452,689,240

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

Table 73 Quantity and Value of Cassava Import by Countries of Origin in 2023

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia														
Lao PDR														
Malaysia						135.16					124	46,738	1	308
Myanmar														
Philippines														
Singapore					3.22	19,221			1,548	542,998				
Thailand			887,024	130,289,872	199	391,146	1,367,553	226,523,517	9	43,110	35,601	5,421,307		3
Vietnam								16,433,163						

[75]

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia			506	137,580			506	137,580			506	137,580
Lao PDR			1,389,637	191,894,645	181,489	30,819,984	1,571,125	222,714,629	1,059	139,256	1,572,184	222,853,885
Malaysia						62,259	0	62,394		95,836	0	158,230
Myanmar			154	424,000			154	424,000			154	424,000
Philippines			0.281	355			0	355	0.18	619	0	974
Singapore			37	36,714	0.47	1,095	1,588	600,028	1	2,160	1,589	602,188
Thailand	1.40	184,786			537	418,873	2,290,924	363,272,613	4,229	12,414,394	2,295,153	375,687,007
Vietnam				385,495			0	16,818,658		819,744	0	17,638,402

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

Table 74 FOB Price of Cassava in selected ASEAN countries

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022	997	2,395	2,271	2,018	502	-	1,641	1,896	2,744	2,168	913	885	1,675
		2023	2,087	2,201	1,914										
Lao PDR	Not specified	2022	144	147	150	146	144	145						140	145
		2023	140	144	140										
Malaysia	Not specified	2022	254	311	279	276	295	311	356	276	293	447			310
		2023													
Myanmar	Not specified	2022	330	271	295	224	239	206					360	364	286
		2023	133	144	138	138									
Thailand	Starch	2022	488	488	490	497	516	535	514	498	485	483	474	485	496
		2023	492	515	528	541	553								
	Pellets	2022	346	348	249	-	277	274	291	312	649	297	380	374	345
		2023	289	280	279										
	Shredded	2022	245	247	262	277	288	291	283	275	271	264	252	251	267
		2023	268	275	274	270	270								
Vietnam	Not specified	2022	431	408	442	444	438	440	455	469	454	431	417	392	435
		2023	393	376	383	401									

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

Table 75 CIF Price of Cassava in selected ASEAN countries

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022	-	-	-	-	-	0	-	-	-	0	-	0	0
		2023	1,000	272	-										
Malaysia	Not specified	2022	341	444	2,844	536	471	576	392	397	1,456	1,194			865
		2023													
Singapore	Not specified	2022	327	351	342	340	336	354	359	354	358	387	342	386	353
		2023	358	349	393	400	387	378	378	378	378	378	378	378	378

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

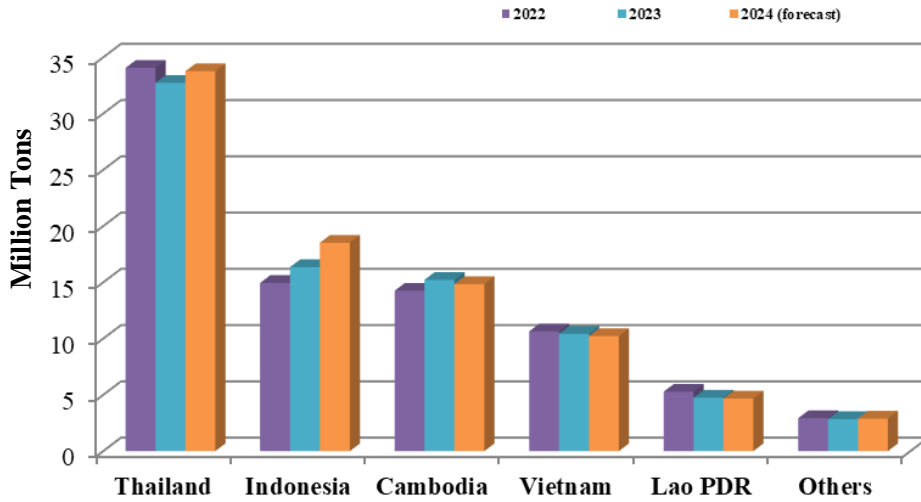


Figure 62 Cassava production of selected countries in ASEAN, 2022 – 2024

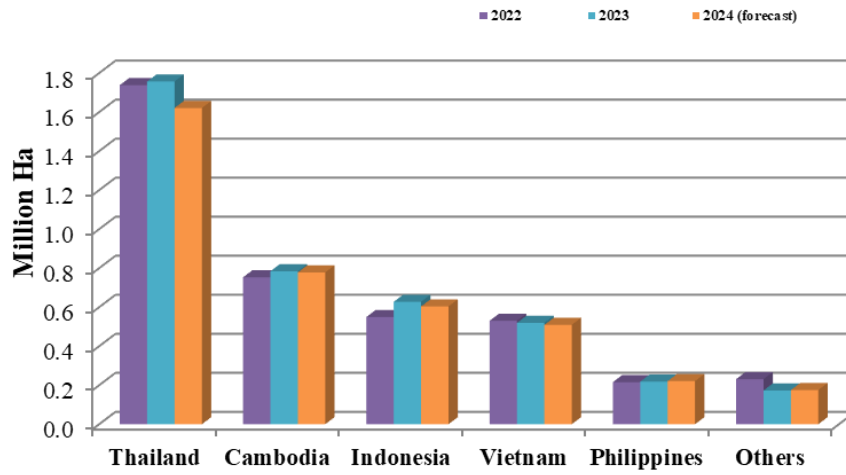


Figure 63 Cassava planted area of selected countries in ASEAN, 2022 – 2024

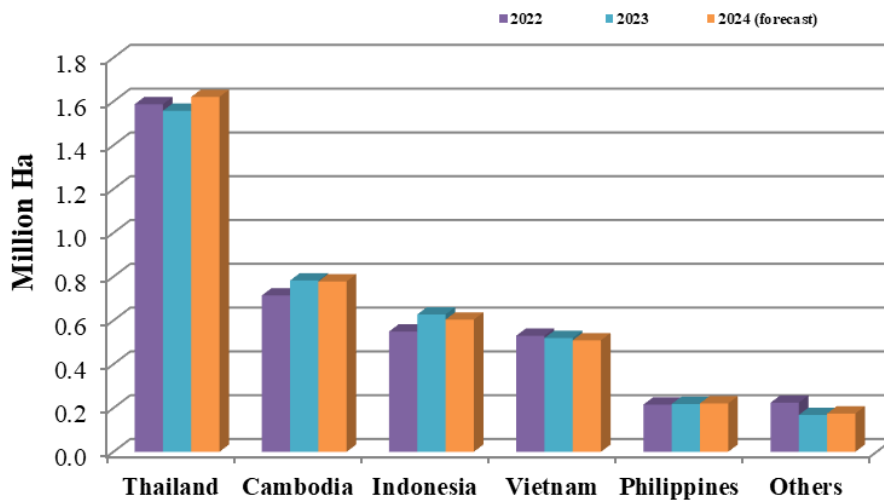


Figure 64 Cassava harvested area of selected countries in ASEAN, 2022 – 2024

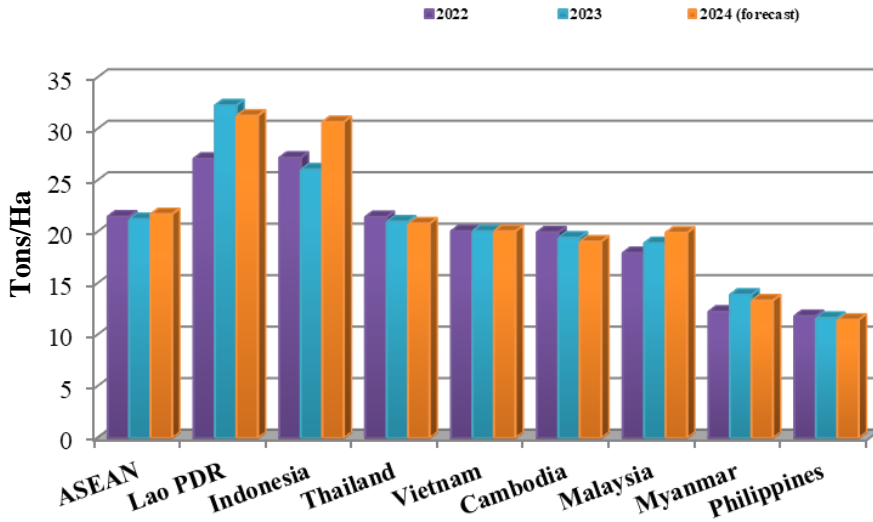


Figure 65 Cassava yield of countries in ASEAN, 2022 – 2024

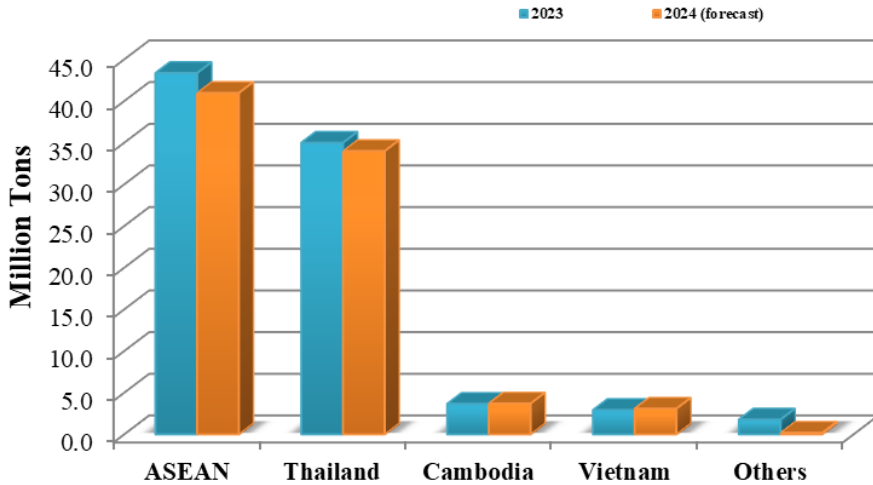


Figure 66 Amount of cassava export (million tons) of selected countries in ASEAN in 2023 – 2024

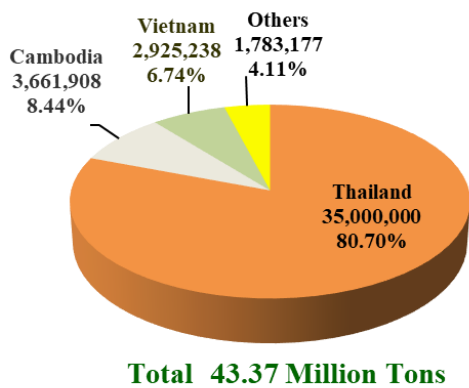


Figure 67 Share of cassava export (tons) among ASEAN countries, 2023

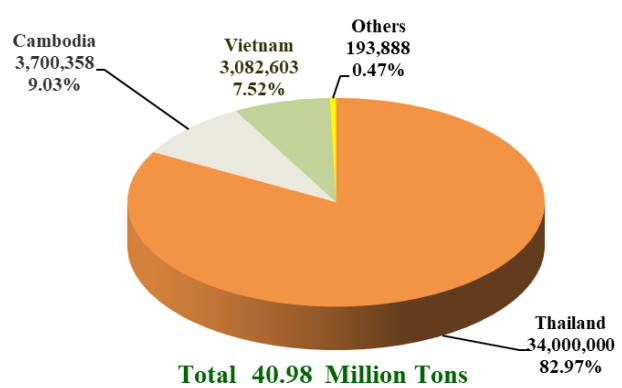


Figure 68 Share of cassava export (tons) among ASEAN countries, 2024

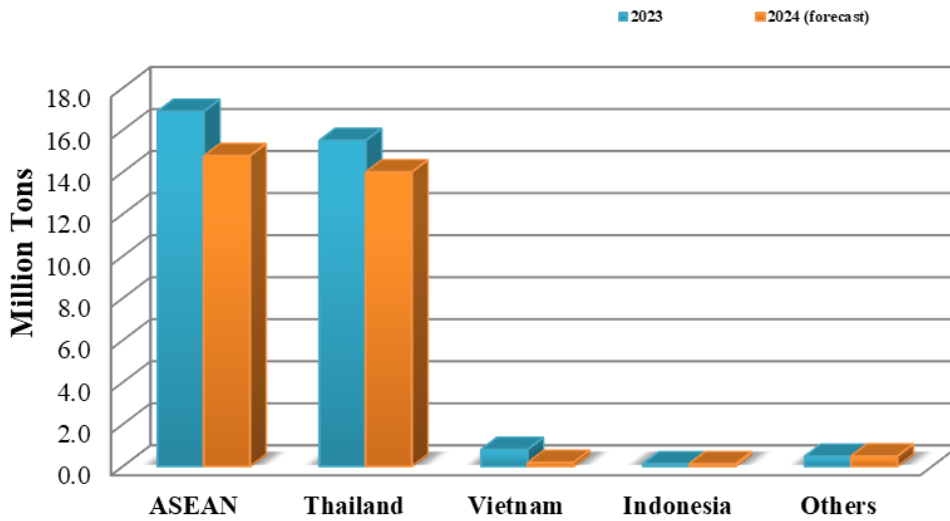
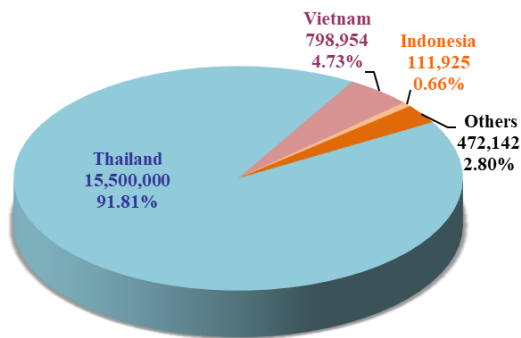
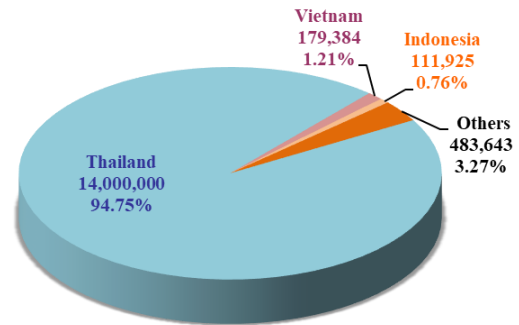


Figure 69 Amount of cassava import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 16.88 Million Tons



Total 14.77 Million Tons

Figure 70 Share of cassava import (tons) among ASEAN countries, 2023

Figure 71 Share of cassava import (tons) among ASEAN countries, 2024

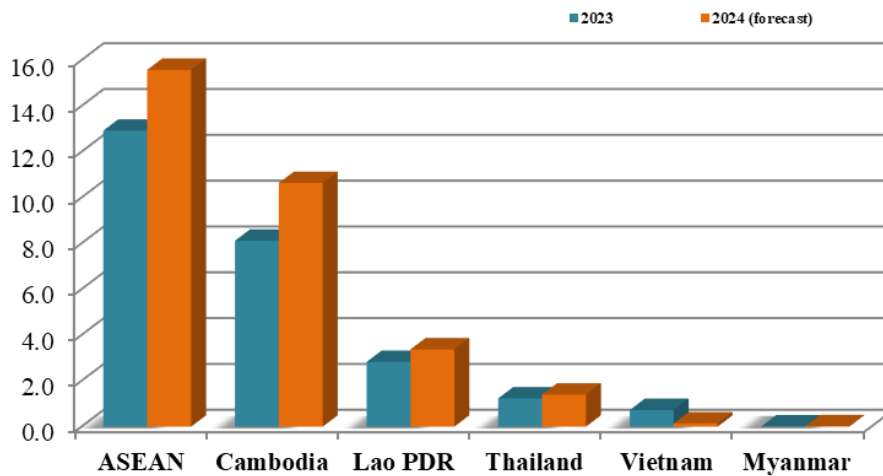


Figure 72 Amount of ending stock of cassava in ASEAN countries in 2023 – 2024

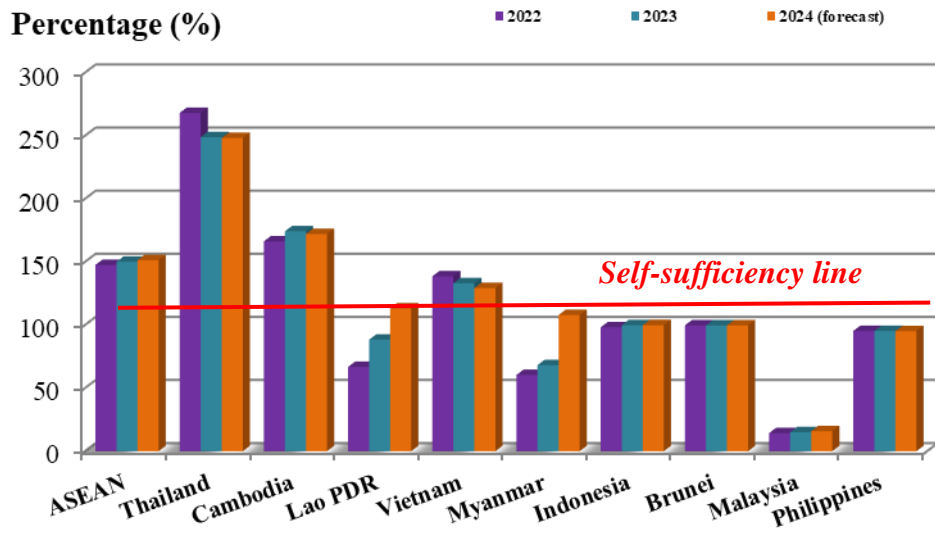


Figure 73 Ratio of cassava production to domestic utilization in ASEAN countries, 2022 – 2024

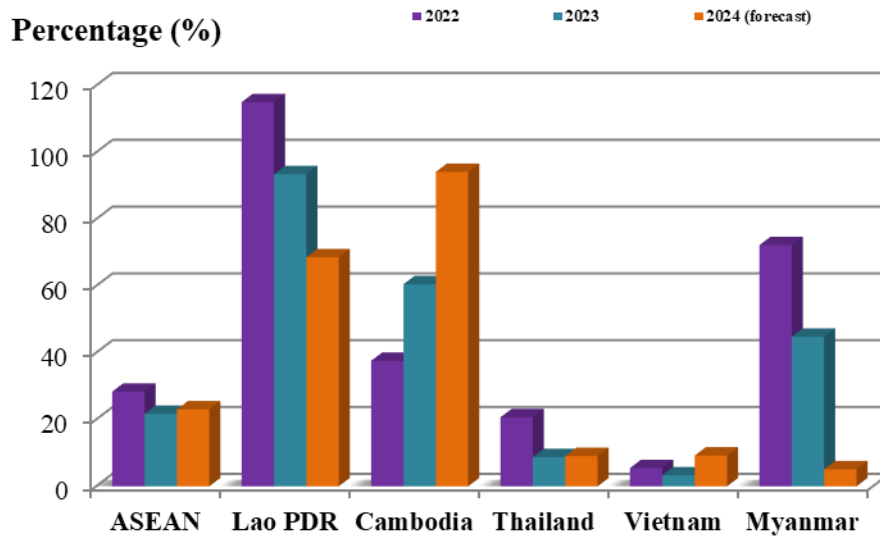


Figure 74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

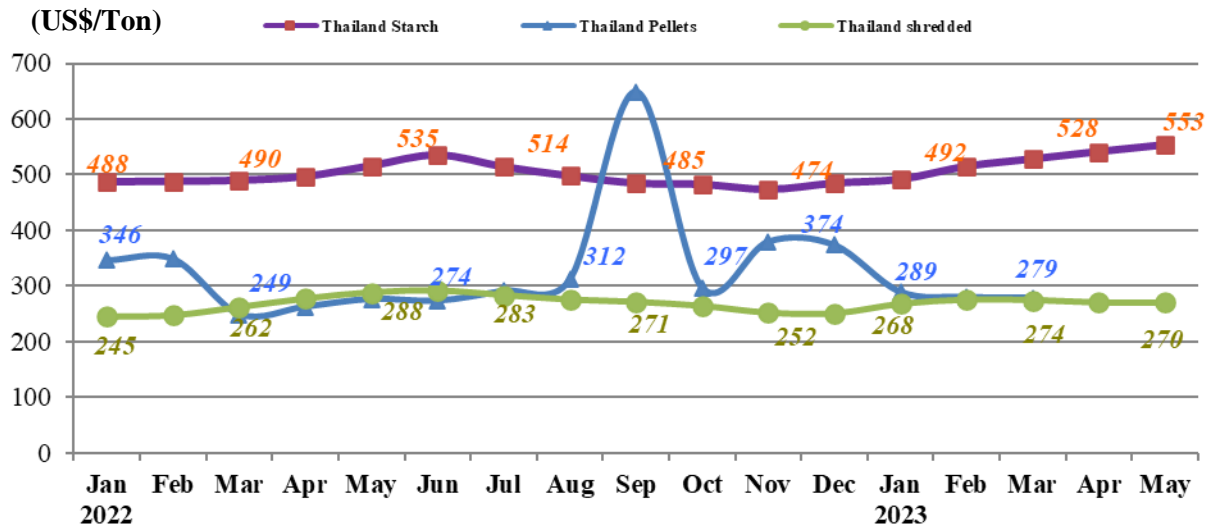


Figure 75 FOB price (US\$/Ton) of cassava of Thailand in 2022 – 2023

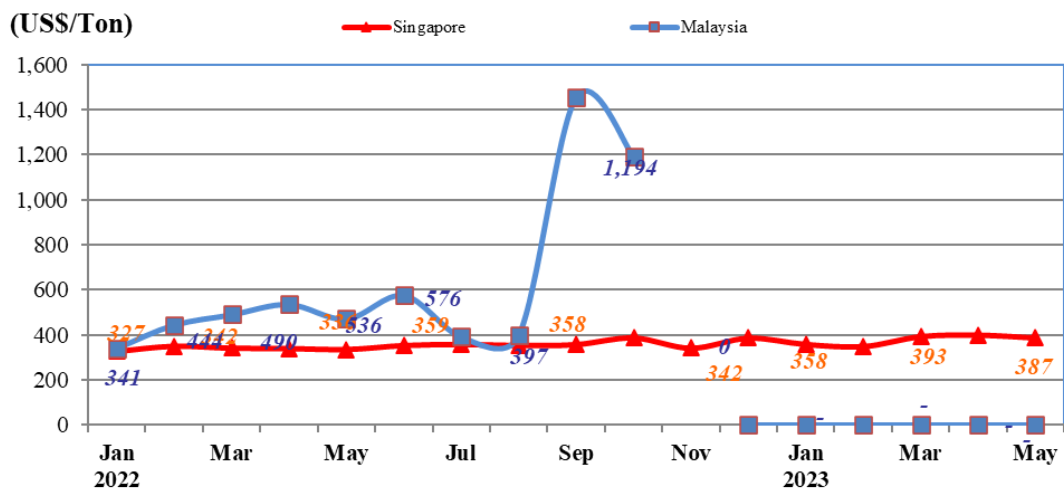


Figure 76 CIF price (US\$/Ton) of cassava selected countries in ASEAN in 2022-2023

Explanatory Notes Production of Paddy for 2023

▶ **Brunei:**

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

▶ **Cambodia:**

- Wet season refers to the crop harvested during August to December 2023.
- Dry season refers to the crop harvested during February to April 2022.

▶ **Indonesia:**

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

▶ **Lao PDR:**

- Wet season refers to the crop harvested during September to December 2023.
- Dry season refers to the crop harvested during February to May 2023.

▶ **Malaysia:**

- Wet season refers to the crop harvested during August 2022 to February 2023.
- Dry season refers to the crop harvested during February to July 2023.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2022 to February 2023.
- Dry season refers to the crop harvested during February to August 2023.

▶ **Philippines:**

- Wet season refers to the crop harvested during July to December 2022.
- Dry season refers to the crop harvested during January to June 2023.

▶ **Thailand:**

- Wet season refers to the crop harvested during August 2022 to April 2023.
- Dry season refers to the crop harvested during February to October 2023.

▶ **Vietnam:**

❖ **Spring-season**

- North refers to the crop harvested during May to July 2023.
- South refers to the crop harvested during March to June 2023.

❖ **Autumn-season**

- North refers to the crop harvested during August to October 2023.
- South refers to the crop harvested during July to September 2023.

❖ **Winter-season**

- North refers to the crop harvested during October to November 2023.
- South refers to the crop harvested during October to December 2023.



Production of Maize for 2022

▶ Brunei:

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

▶ Cambodia:

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

▶ Indonesia:

- 1st crop harvested during January to April 2023.
- 2nd crop harvested during May to August 2023.
- 3rd crop harvested during September to December 2023.

▶ Lao PDR:

- Wet season refers to the crop harvested during May to September 2023.
- Dry season refers to the crop harvested during November 2022 to March 2023.

▶ Myanmar:

- Wet season refers to the crop harvested during August to December 2020.
- Dry season refers to the crop harvested during January to June 2023.

▶ Philippines:

- Wet season refers to the crop harvested during July to December 2022.
- Dry season refers to the crop harvested during January to June 2023.

▶ Thailand:

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

▶ Vietnam:

- 1st crop harvested during April to June 2023.
- 2nd crop harvested during October to November 2023.

Production of Sugarcane for 2023

- ▶ **Brunei:**
 - The crop harvested during January to December 2023.
- ▶ **Cambodia:**
 - The crop harvested during December 2022 to January 2023.
- ▶ **Indonesia:**
 - The crop harvested during February to December 2023.
- ▶ **Lao PDR:**
 - The crop harvested during February to May 2023.
- ▶ **Myanmar:**
 - The crop harvested during October 2022 to June 2023.
- ▶ **Philippines:**
 - The crop harvested during October 2022 to June 2023.
- ▶ **Thailand:**
 - The crop harvested during December 2022 to April 2023.
- ▶ **Vietnam:**
 - The crop harvested during November 2022 to May 2023.



Production of Soybean for 2023

▶ **Cambodia:**

- The crop harvested during September to October 2023.

▶ **Indonesia:**

- 1st crop harvested during January to April 2023.
- 2nd crop harvested during May to August 2023.
- 3rd crop harvested during September to December 2023.

▶ **Lao PDR:**

- Wet season refers to the crop harvested during May to October 2023.
- Dry season refers to the crop harvested during November 2022 to February 2023.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2022 to January 2023.
- Dry season refers to the crop harvested during December 2022 to May 2023.

▶ **Philippines:**

- Wet season refers to the crop harvested during August to December 2022.
- Dry season refers to the crop harvested during January to June 2023.

▶ **Thailand:**

- Wet season refers to the crop harvested during August to December 2022.
- Dry season refers to the crop harvested during January to May 2023.

▶ **Vietnam:**

- Wet season refers to the crop harvested during February to May 2023.
- Dry season refers to the crop harvested during August to November 2023.

Production of Cassava for 2023

▶ Brunei:

- The crop harvested during January to December 2023.

▶ Cambodia:

- The crop harvested during November 2022 to January 2023.

▶ Indonesia:

- 1st crop harvested during January to April 2023.
- 2nd crop harvested during May to August 2023.
- 3rd crop harvested during September to December 2023.

▶ Lao PDR:

- The crop harvested during October to November 2023.

▶ Malaysia:

- The crop harvested during October 2022 to December 2023.

▶ Myanmar:

- The crop harvested during September 2022 to June 2023.

▶ Philippines:

- 1st crop harvested during September to December 2022.
- 2nd crop harvested during January to June 2023.

▶ Thailand:

- The crop harvested during October 2022 to September 2023.

▶ Vietnam:

- Wet season refers to the crop harvested during September to October 2023.
- Dry season refers to the crop harvested during January to March 2024.

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

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

nil: Small amount



Milling Rate of Rice (2023)

Unit: Tons

Country	Paddy	Rice
ASEAN	1	0.64
Brunei	1	0.65
Cambodia	1	0.64
Indonesia	1	0.63
Lao PDR	1	0.60
Malaysia	1	0.70
Myanmar	1	0.63
Philippines	1	0.67
Thailand	1	0.65
Vietnam	1	0.65

Extraction rate of Sugar (2023)

Unit: Tons

Country	Sugarcane	Sugar
ASEAN	1,000	95.44
Cambodia	1,000	100.00
Indonesia	1,000	72.01
Lao PDR	1,000	200.00
Myanmar	1,000	79.94
Philippines	1,000	88.02
Thailand	1,000	104.24
Vietnam	1,000	100.00



ANNEX 1

Rice crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.30 report

Country		2022						2023												2024						
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb					
Brunei	Wet season																									
	Dry season																									
Cambodia	Wet season																									
	Dry season																									
Indonesia	Wet season																									
	Dry season																									
Lao PDR	Wet season																									
	Dry season																									
Malaysia	Wet season																									
	Dry season																									
Myanmar	Wet season																									
	Dry season																									
Philippines	Wet season																									
	Dry season																									
Thailand	Wet season																									
	Dry season																									
Vietnam	Spring																									
	Autumn																									
	Winter																									

ANNEX 2

Maize crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.30 report

Country	Crop	2022					2023												2024	
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet season	█	█	█	█	█	↔												█	█
	Dry season	█	█	█	█	█	↔												█	█
Cambodia	Wet season	█	█	█	█	█	↔												█	█
	Dry season	█	█	█	█	█	↔												█	█
Indonesia	1st	█	█	█	█	█	↔												█	█
	2nd	█	█	█	█	█	↔												█	█
	3rd	█	█	█	█	█	↔												█	█
Lao PDR	Wet season	█	█	█	█	█	↔												█	█
	Dry season	█	█	█	█	█	↔												█	█
Myanmar	Wet season	↔																	█	█
	Dry season	█	█	█	█	█	↔												█	█
Philippines	Wet season	↔																	█	█
	Dry season	█	█	█	█	█	↔												█	█
Thailand	Wet season	█	█	█	█	█	↔												█	█
	Dry season	█	█	█	█	█	↔												█	█
Vietnam	1st	█	█	█	█	█	↔												█	█
	2nd	█	█	█	█	█	↔												█	█















ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.30 report

Country	Crop	2022				2023											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei						←—————→											
Cambodia						←—————→											
Indonesia						←—————→											
Lao PDR						←————→											
Myanmar						←—————→											
Philippines						←—————→											
Thailand						←————→											
Vietnam						←—————→											

ANNEX 4

Soybean crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.30 report

Country	Crop	2022					2023												
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Cambodia																			
Indonesia	1st																		
	2nd																		
	3rd																		
Lao PDR	Wet season																		
	Dry season																		
Myanmar	Wet season																		
	Dry season																		
Philippines	Wet season																		
	Dry season																		
Thailand	Wet season																		
	Dry season																		
Vietnam	Wet season																		
	Dry season																		

ANNEX 5

Cassava crop calendar (harvested months) for crop year 2022/23(2023) in ACO No.30 report

Country	Crop	2022				2023											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei						←—————→											
Cambodia																	
Indonesia	1st					←————→											
	2nd									←————→							
	3rd													←————→			
Lao PDR																	
Malaysia						←—————→											
Myanmar																	
Philippines	1st					←————→											
	2nd					←————→											
Thailand						←—————→											
Vietnam	North													←————→			
	South					←————→											



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