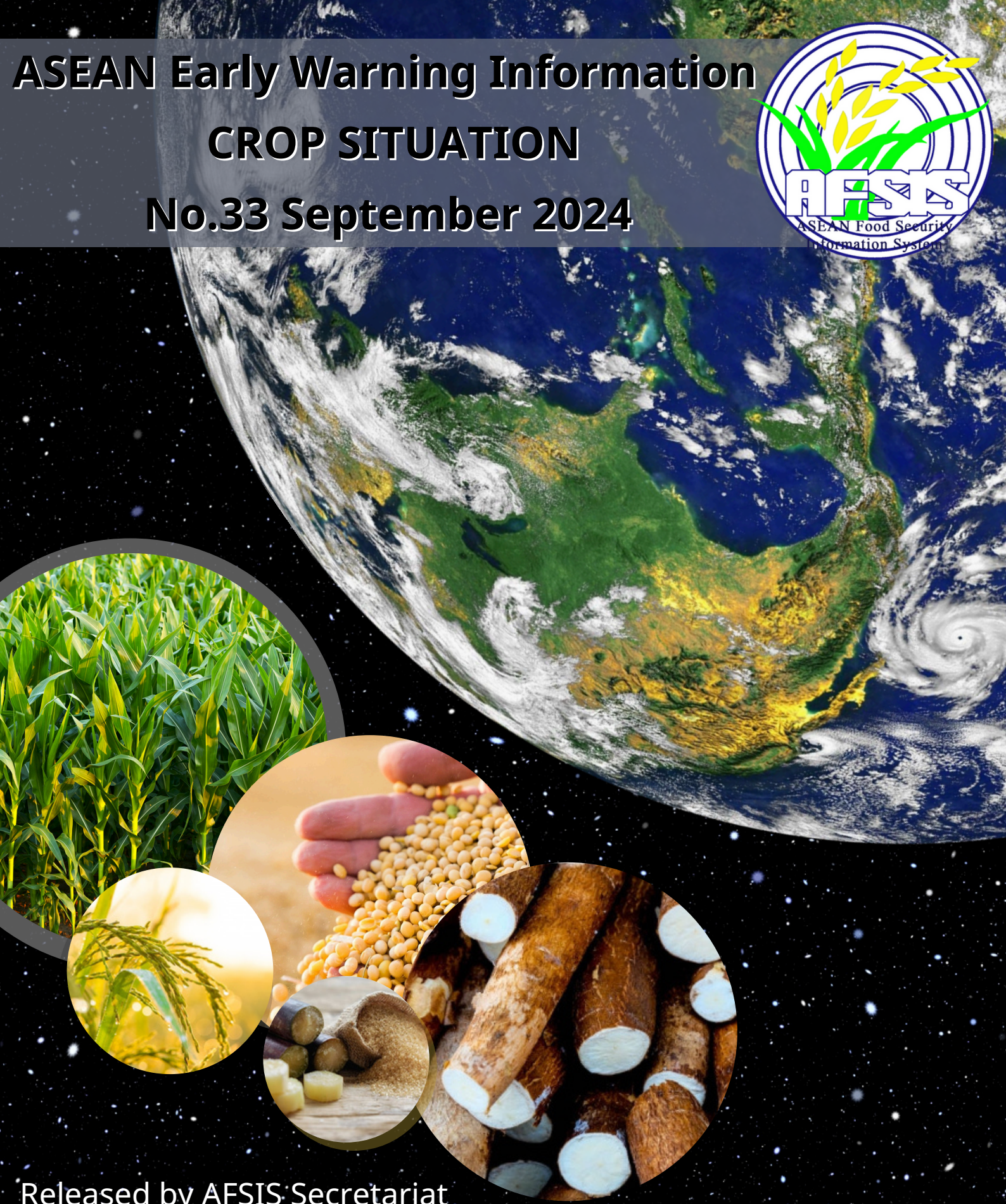
ASEAN Early Warning Information
CROP SITUATION
No.33 September 2024



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Brunei Darussalam

Crop Situation in 2025 (P.1/2)

In 2025 (2024/2025), Brunei is expected to appear favorable weather conditions for crop cultivation. All regions are projected to benefit from sufficient sunlight, with temperatures ranging from 25 to 35 degrees Celsius. Moderate rainfall is expected to appear in ranging from 20 to 50 millimeters per day so it is expected to positively affect in irrigation systems or water management practices. However, due to the effects of climate change and global warming, influenced by the El Niño phenomenon occurring in the region and the average rainfall is expected to be lower than usual, which brings hotter temperatures and low precipitation from August 2023 to March 2024. Although rice fields remain productive due to existing irrigation infrastructure, prolonged droughts have compelled farmers to delay planting until the off-season. Currently, the region is experiencing heavier-than-normal rainfall combined with high temperatures, which increases the risk of pest infestations (Rice Brown Planthopper).

Despite these challenges, farmers will adapt their practices to mitigate risks and minimize damage from natural disasters. They have adjusted their cultivation plans and planting times to better align with changing weather patterns, thus optimizing crop growth. Additionally, the government has played a crucial role in these risk mitigation efforts by implementing policies that support farmers. This includes providing access to new technologies and improving irrigation systems to address challenges related to water supply and mitigating the risks associated with low water availability.

For rice in 2025, the rice situation is expected to improve, with increases in both planted areas and production. The expansion of hybrid rice cultivation has significantly boosted productivity and overall planted area. The increase in production is further supported by favorable weather conditions, increase access to fertilizer, the use of improved crop varieties, and training for farmers and agricultural staff. The rice harvesting period in 2025 is expected to run from January 2025 to April 2025 for the wet season and from July 2025 to October 2025 for the dry season. Additionally, there has been an increase in rice imports in 2024 compared to 2023 (Figure 1).

For sugarcane in 2025, planted area for sugarcane is expected to increase due to favorable weather conditions. The rise in production is further supported by improved crop care practices, increase access to fertilizer, and adoption of high-quality seed varieties. The continuous harvesting and planting of sugarcane throughout the year contribute to this increase. Additionally, the sugar import situation in 2024 shows a slight increase compared to 2023 (Figure 2).

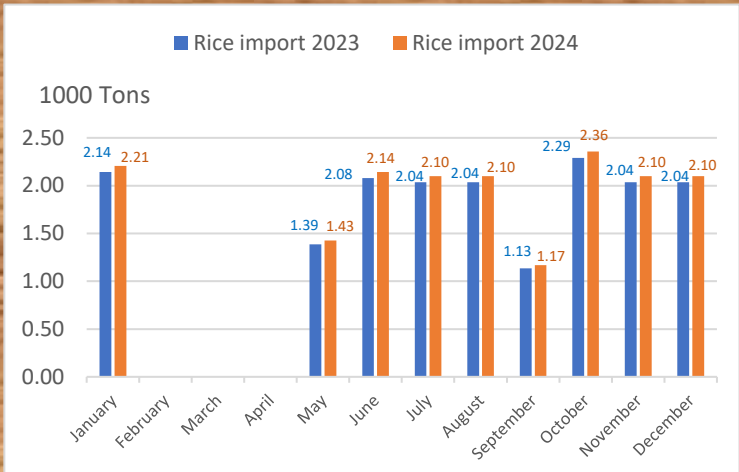


Figure 1: Monthly quantity of rice imports in 2023 – 2024

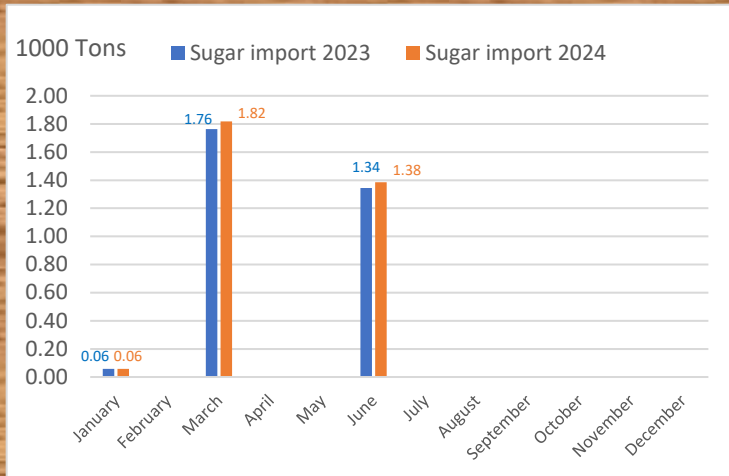


Figure 2: Monthly quantity of sugar imports in 2023 – 2024

Crop Situation in 2025 (P.2/2)

For maize in 2025, the maize situation is expected to improve with increases in both planted areas and production. The expansion in planted areas is driven by farmers responding to price incentives and favorable weather conditions. The increasing in production is supported by improved crop care practices, increase access to fertilizer, the adoption of high-quality seed varieties, strategic crop rotation, expanded land for maize cultivation, and high consumer demand. In 2025, maize will be harvested and planted continuously throughout the year.

For soybean in 2023 - 2024, import situation in 2024 is expected to increase in 2024 compared to 2023 slightly (Figure 3).

For cassava in 2025, both the planted area and production of cassava are expected to increase. The expansion in planted area is driven by farmers responding to rising prices. Additionally, production is anticipated to grow due to effective crop management practices, the use of improved varieties, and the demand for value-added and processed products such as crisps, fritters, and desserts. On the other hand, the import situation is expected to show lower imports during February-March 2024 and May-June 2024 (Figure 4). At last, Cassava harvesting and planting will occur continuously throughout the year.

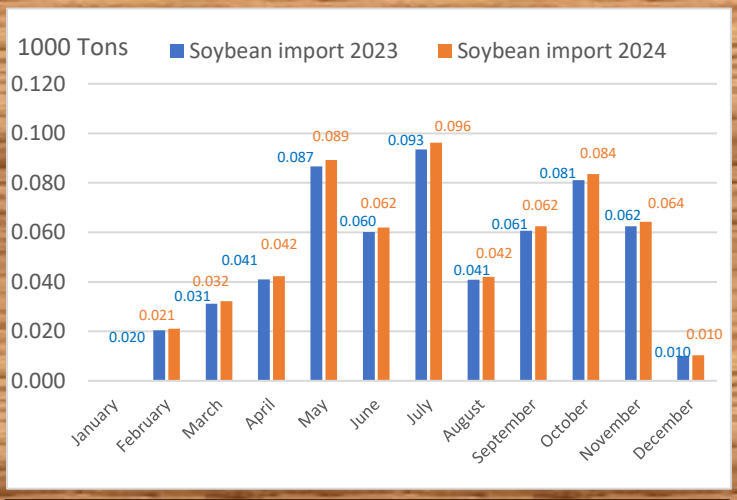


Figure 3: Monthly quantity of soybean imports in 2023 – 2024

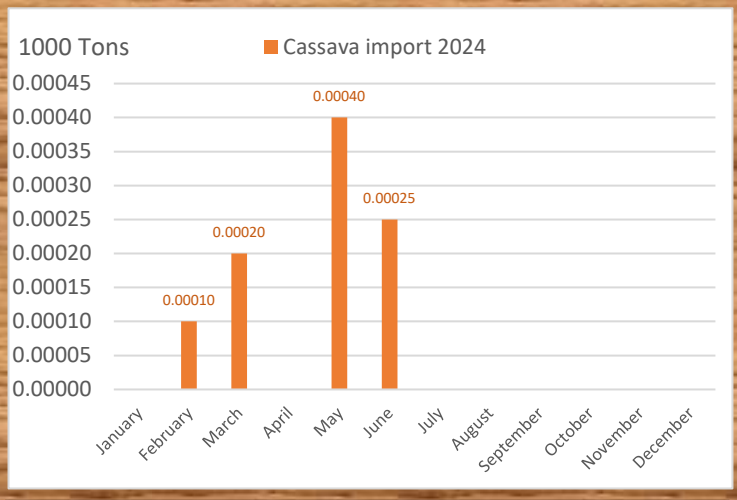


Figure 4: Monthly quantity of cassava imports in 2024

CAMBODIA

Crop Situation in 2025 (P.1/2)

In 2025 (2023/2024), Cambodia is expected to experience a sufficient supply of water, primarily through irrigation systems, despite minimal daily rainfall ranging from 0.5 to 20 millimeters per day. These conditions are influenced by global warming, and the presence of El Niño may lead to natural disasters that could impact crop production. In 2024, the following natural disasters have been reported: 1) Floods in Banteay Meanchey, Battambang, Kampong Thom, Pursat, Siem Reap, Prey Veng, Takeo, and Tbong Khmum. 2) Droughts in Banteay Meanchey, Battambang, Takeo, Kampong Cham, Kampong Chhnang, and Tbong Khmum. 3) Pest outbreaks in Prey Veng, Svay Rieng, Takeo, Pursat, and Tbong Khmum. In 2024, Cambodia's agricultural sector suffered significant crop damage due to adverse weather and natural disasters. Affected areas include 31,705 hectares of rice, 6,210 hectares of maize, 74 hectares of soybean, and 22,128 hectares of cassava. These impacts underscore the vulnerability of key crops to climate conditions and natural calamities, which have disrupted production across the country.

To mitigate the risks posed by climate change and global warming, farmers can adopt several adaptive strategies to mitigate potential damage from natural disasters. These strategies include adjusting cultivation plans or shifting planting times to better align with changing weather patterns and using crop varieties that are resistant to climate change. Additionally, the government has implemented various policies aimed at supporting farmers and reducing the risks associated with natural disasters. These policies include providing farmers with access to new technologies and offering market opportunities to sell crop products for farmer.

For maize in 2025, Cambodia's maize sector is expected to see an increase in planted area and production. This growth is attributed to farmers responding to higher maize prices, a decrease in the price of competing crops, and supportive government policy. Additionally, maize production is forecasted to rise due to improved crop management and the use of high-quality varieties. The harvesting period for maize in 2024 was from August 2024 to October 2024 for the wet season and from March 2024 to April 2024 for the dry season.

For sugarcane in 2025, Cambodia's sugarcane sector is expected to experience an increase in both planted area and production. This growth is driven by farmers responding to higher sugarcane prices, decreased prices of competing crops, and supportive government policies. Improved crop management practices and the use of high-quality varieties are also contributing to the expected rise in production. The harvesting period for sugarcane in 2024 was scheduled from November 2024 to December 2024, with the possibility of extending into January 2025.

For soybean in 2025, Cambodia's soybean sector is expected to see a decrease in both planted area and production. The reduction in planted area is attributed to rising prices of competing crops. Additionally, unfavorable weather conditions and flooding are anticipated to negatively impact soybean production. The harvesting period for soybeans in 2024 is scheduled from September 2024 to October 2024.

For cassava in 2025, Cambodia’s cassava sector is expected to see an increase in both the planted area and production of cassava. This growth is driven by farmers responding to price increases and supportive government policies. The rise in production is further supported by the application of fertilizers and high-quality cassava varieties. The harvesting period for cassava in 2024 was scheduled from November 2024 through January 2025.

Crop Situation in 2025 (P.2/2)

For rice in 2025, Cambodia's rice sector is projected to see an increase in both the planted area and production of rice. This growth is driven by farmers responding to higher prices and the intervention of support measures for those affected by floods, droughts, and pests. The rise in production is expected to support by the use of high-quality rice varieties. The harvesting period for rice in 2024 was from August 2024 to December 2024 for the wet season and from February 2024 to April 2024 for the dry season. Additionally, the trend of rice imports in 2023 to 2024 showed fluctuations (Figure 5).

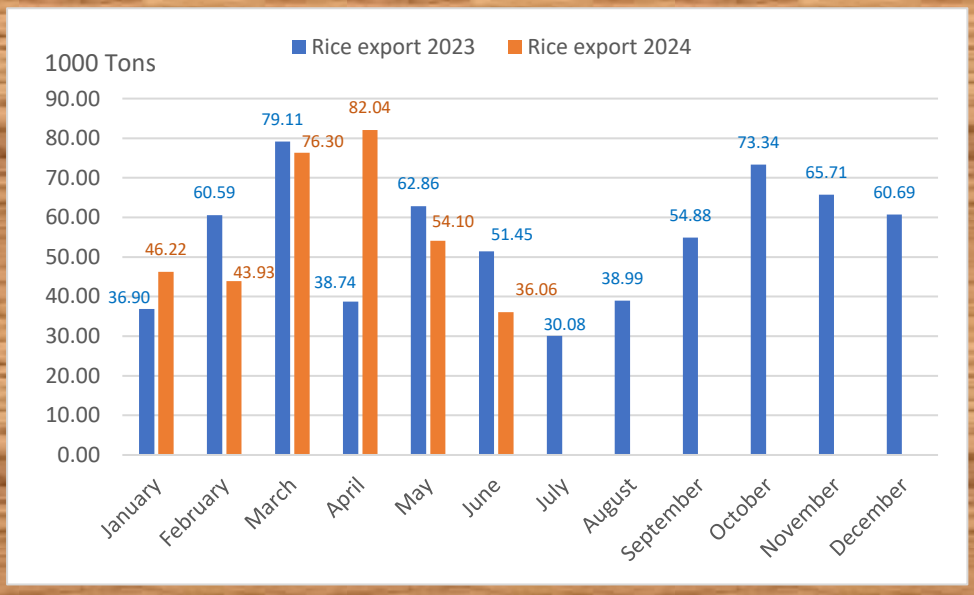


Figure 5: Monthly quantity of rice export in 2023 -2024

Crop Situation in 2025 (P.1/4)

The weather in Indonesia in 2025 (2024/25) is forecasted to be favorable for growing crops, with sufficient water availability to meet commodity needs. This includes appropriate rainfall, supplemented by irrigation in regions with limited water resources. The temperature is expected to remain conducive for crop growth, ranging between 20 to 31°C, and plants will receive an average of 6 hours of sunlight per day. Rainfall is expected to vary significantly, ranging from 0.5 to over 151 millimeters per day, indicating the possibility of both low and extreme rainfall conditions in certain areas.

In 2025, Indonesia's agriculture is expected to experience significant impacts from climate change and global warming. These effects will manifest in extreme drought conditions caused by El Niño, alternating with heavy rains brought by La Niña. Some regions will face prolonged droughts, while others will experience intense rainfall, leading to challenges in managing water resources and crop production. The alternating extreme weather patterns throughout the year will pose risks for farmers, impacting crop yields and requiring adaptive strategies to mitigate potential damage.

In 2024, Indonesia's agricultural sector faced severe challenges due to natural disasters, including floods, droughts, and pest outbreaks. Floods affected regions such as Aceh, North Sumatera, West Sumatera, Riau, Jambi, South Sumatera, Bengkulu, Lampung, West Java, Central Java, East Java, Banten, West Nusa, and various areas in Kalimantan and Sulawesi. Droughts hit areas like Aceh, West Sumatera, Riau, West Java, Central Java, and several regions in Nusa and Sulawesi. Additionally, disease and pest outbreaks impacted crops in North Sumatera, South Sumatera, Java, Kalimantan, and Sulawesi. As a result, the damaged agricultural areas were significant, with 70,459 hectares of rice, 9,344 hectares of maize, and 126 hectares of soybean being affected. These damages highlighted the severe effects of climate change and global warming on Indonesia's agricultural productivity.

However, farmers in Indonesia are adapting to the ongoing effects of climate change and global warming by adjusting their cultivation plans, developing centralized and independent organic fertilizers, and modifying planting times to suit the changing weather patterns. The government has played a key role in mitigating risks and implementing policies to address potential damage from natural disasters. In response to the impacts of El Niño, the Indonesian government has initiated various adaptation and mitigation efforts in the agricultural sector. These include accelerating planting to match the remaining rainfall, increasing the availability of agricultural machinery, and enhancing water resources through the construction and repair of reservoirs, trench dams, deep wells, and irrigation networks. The government has also provided drought-resistant seeds, implemented adaptation programs for El Niño impacts over 1,000 hectares per district, launched the El Niño National Movement (Gernas) across 10 provinces and 100 districts, aiming to plant an additional 500,000 hectares, and prepared food granaries at the village level.

For rice in 2025, both the planted area and production are forecasted to decrease. The reduction in planted area is influenced by Indonesia's diverse climatic conditions, where certain regions, particularly in the south, are expected to experience persistent drought, while others are expected to face high rainfall. In addition, Indonesia's geographical position, straddling both north and south of the equator, results in varying weather patterns annually. Although a neutral El Niño effect is projected for 2024, it is expected to impact the country minimally, but southern areas may continue to experience drought. Furthermore, the decrease in production is largely due to these unfavorable weather conditions. The harvesting for rice in 2025 is set for January 2024 to June 2024 for the wet season and July 2024 to December 2024 for the dry season. Regarding to trade, rice imports increased in 2024, while exports continued to decline, following a low export volume in 2024 (Figure 6-7).

Crop Situation in 2025 (P.2/4)

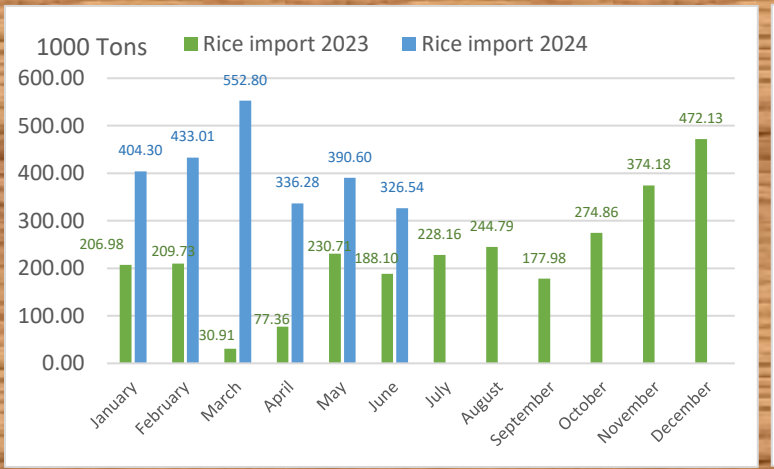


Figure 6: Monthly quantity of rice imports in 2023 -2024

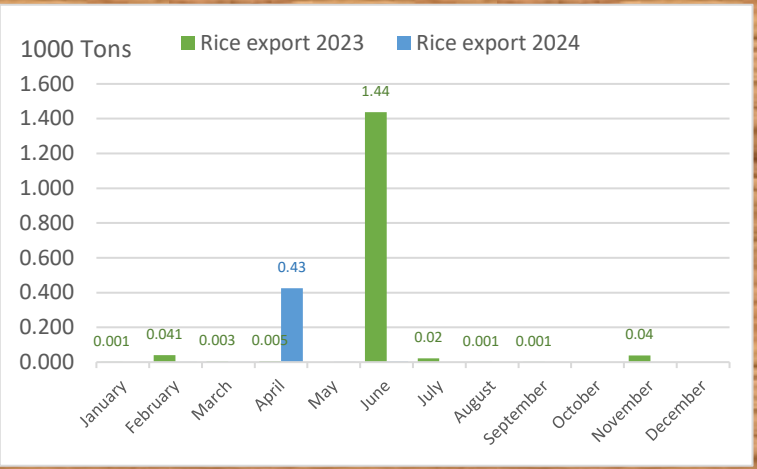


Figure 7: Monthly quantity of rice export in 2023 -2024

For maize in 2025, both the planted area and production are expected to increase. The expansion in planted areas is driven by favorable weather, rising maize prices, a decrease in competing crop prices, and supportive government policies with special assistance programs. The increase in production is further supported by favorable weather, farmers applying more fertilizer, selecting high-yield crop varieties, and maintaining good crop care. Maize harvesting in 2025 is divided into three periods: from January 2024 to April 2024 for the first crop, May 2024 to August 2024 for the second, and September 2024 to December 2024 for the third crop. Maize imports showed an increasing trend in 2024, while exports are projected to decline significantly in 2024 (Figure 8-9).

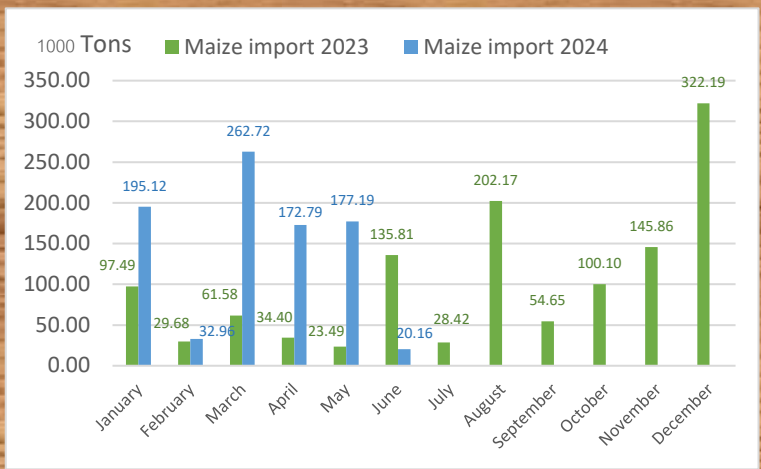


Figure 8: Monthly quantity of maize imports in 2023 -2024

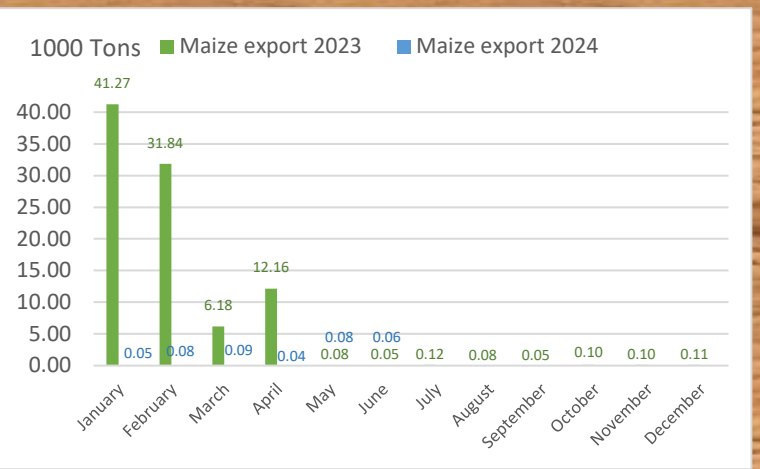


Figure 9: Monthly quantity of maize export in 2023 - 2024

Crop Situation in 2025 (P.3/4)

For sugarcane in 2025, Indonesia is expected to see an increase in both the planted area and production. This expansion is supported by government initiatives focused on extending sugarcane planting areas and offering assistance to farmers. The increase in production is largely attributed to intensification programs, particularly through the ratoon treatment of sugarcane plants, which enhance crop yields. The harvesting period for sugarcane in 2025 is expected to span from January 2024 to November 2024. Sugar import and export trends were volatile in 2023, showing fluctuations in market dynamics (Figure 10-11).

For soybeans in 2025, both the planted area and production are expected to decrease. The reduction in planted area is mainly due to unfavorable weather conditions, rising prices of competing crops, and increasing competition with other food crops or horticultural commodities such as chilies and tomatoes. In addition, the production is anticipated to decline further due to droughts, diseases, and pest infestations. The harvesting periods for soybeans in 2025 are split into three phases: January 2024 to April 2024 for the first crop, May to August 2024 for the second crop, and September 2024 to December 2024 for the third crop. Soybean import and export trends were unstable in 2023 and 2024, reflecting market fluctuations (Figure 12-13).

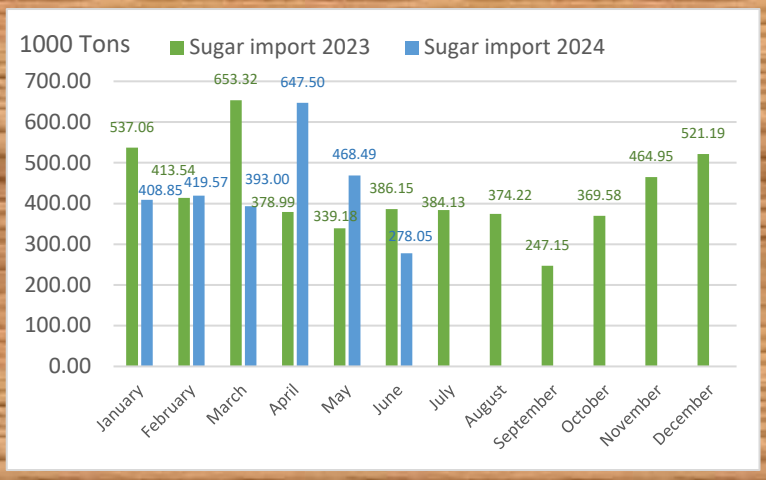


Figure 10: Monthly quantity of sugar import in 2023 -2024

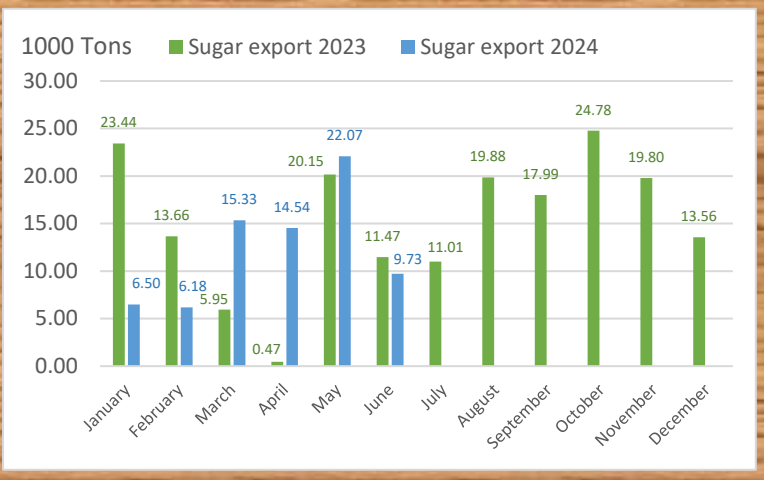


Figure 11: Monthly quantity of sugar export in 2023 - 2024

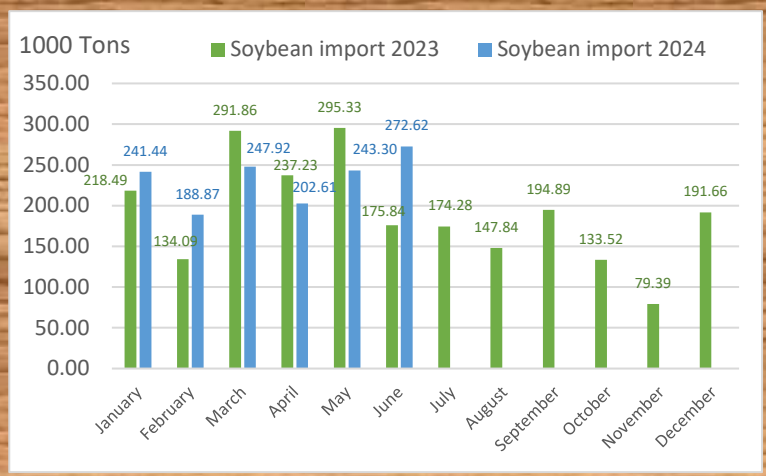


Figure 12: Monthly quantity of soybean import in 2023 -2024

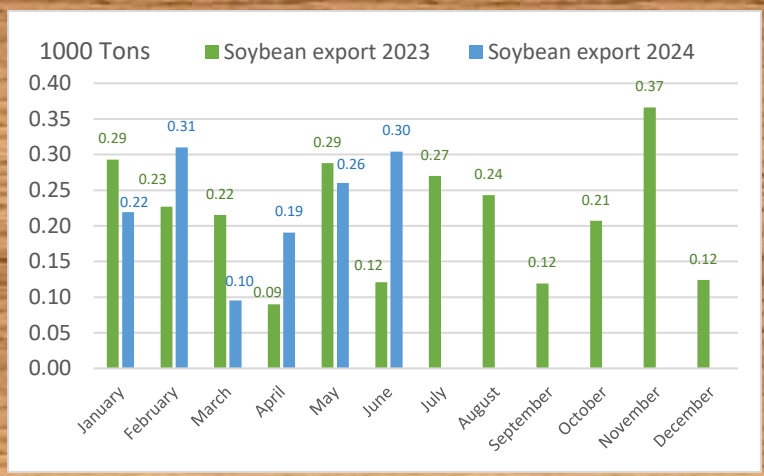


Figure 13: Monthly quantity of soybean export in 2023 - 2024

Crop Situation in 2025 (P.4/4)

For cassava in 2025, both the planted area and production are expected to decrease. The reduction in planted area is due to unfavorable weather conditions, rising prices of competing crops, and competition with other food or horticultural commodities such as chilies and tomatoes. The production decline is also attributed to adverse weather conditions and drought. Cassava harvesting in 2025 will occur in three phases: January 2024 to April 2024 for the first crop, May 2024 to August 2024 for the second crop, and September 2024 to December 2024 for the third crop. Cassava imports increased in 2024, while export trends showed a decline in 2024 (Figure 14-15).

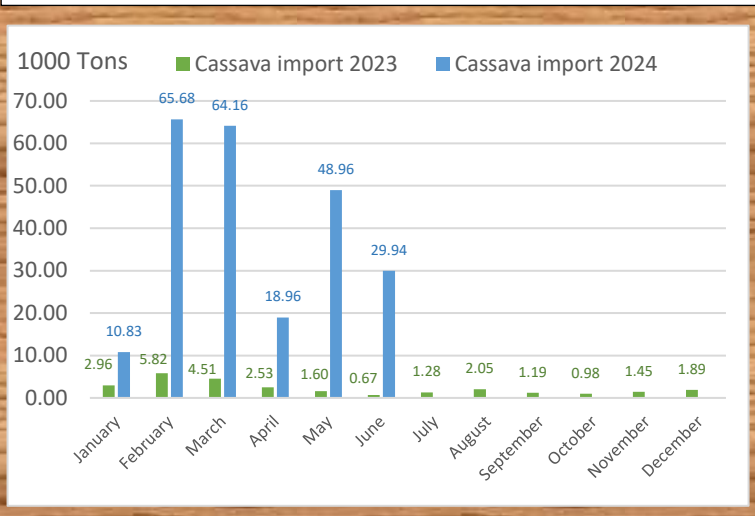


Figure 14: Monthly quantity of cassava import in 2023 -2024

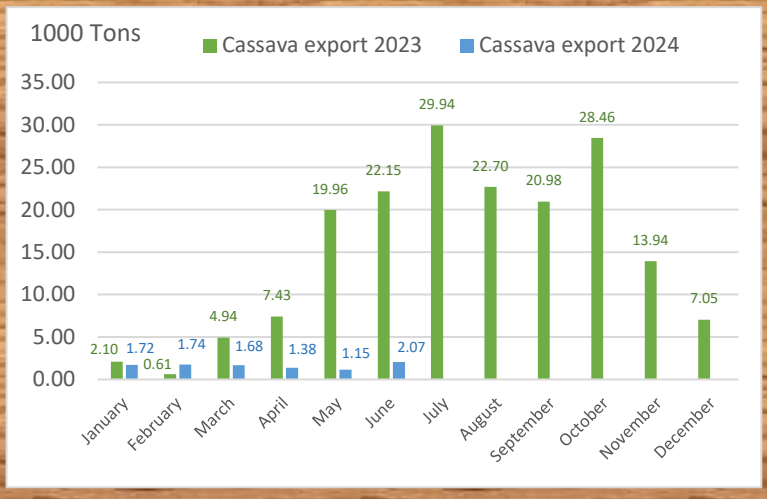


Figure 15: Monthly quantity of cassava export in 2023 -2024


Crop Situation in 2025 (P.1/3)

In 2025 (2024/2025), the weather is expected to be favorable with sufficient sunlight and appropriate rainfall between 50 to 100 millimeters per day. This will allow farmers to maintain water reserves and use irrigation effectively for their crops. Despite the challenges posed by climate change, including higher-than-usual temperatures, farmers can adapt by using resilient crop varieties to mitigate risks and reduce damage from natural disasters. Furthermore, government has implemented various policies to support farmers, such as promoting new technologies and expanding access to credit. Collaborative efforts between farmers and government in water management have also been crucial in reducing the impact of natural disasters. In Lao PDR during 2024 (2023/2024), there have been reports of natural disasters including floods in the central and northern regions, landslides and mudslides in the northern region, and pest outbreaks in Luang Prabang Province, located in the northern region.

For rice in 2025, the planted area is expected to increase as farmers respond to rising prices, favorable weather conditions with sufficient water and sunlight, and supportive government policies aimed at both domestic consumption and export. The production is also anticipated to rise due to favorable weather, proper crop management, and the use of high-quality varieties. Additionally, there has been damage to 2,681 hectares of rice fields in 2024. The rice harvesting period in 2025 is scheduled from October 2024 to December 2024 for the wet season and from March 2025 to May 2025 for the dry season. However, a decrease in imports and an increase in exports have been observed. An increase in domestic production has led to a reduction in trend of rice imports to meet local demand in 2024 (Figure 16). The increased demand from trading partners has resulted in a rise in rice exports in 2024 (Figure 17).

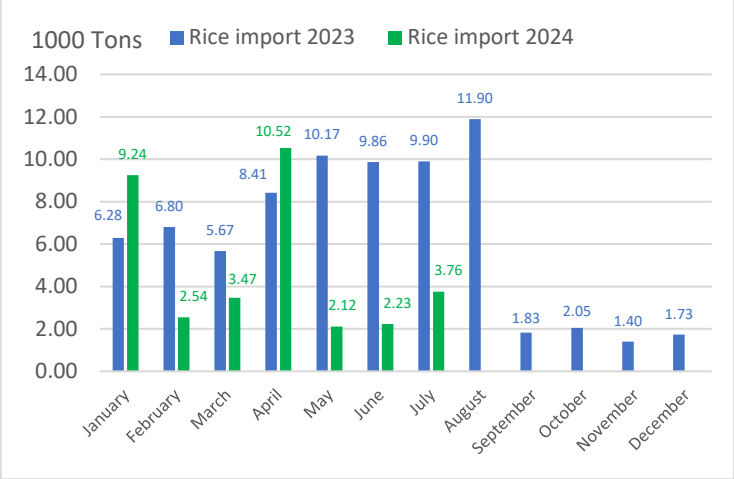


Figure 16: Monthly quantity of rice import in 2023 - 2024

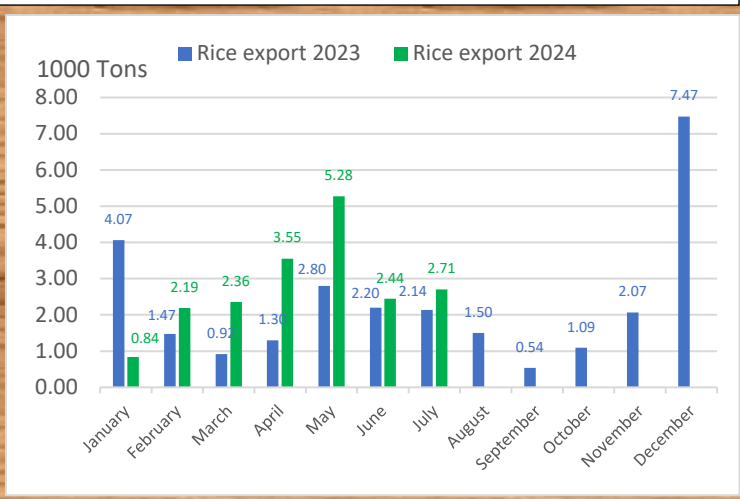


Figure 17: Monthly quantity of rice export in 2023 - 2024

LAO PDR

Crop Situation in 2025 (P.2/3)

For maize in 2025, the decrease in planted area is due to the price of competing crop increase and the impact of unfavorable weather, including floods. Production has declined as a result of these adverse conditions and flood damage, which affected 134 hectares of maize fields. The maize harvesting period in 2025 is expected to occur from September 2024 to November 2024 for the wet season and from January 2025 to May 2025 for the dry season. Both imports and exports of maize are anticipated to increase in 2024. The rise in domestic demand has driven up maize imports (Figure 18). Furthermore, the increased demand from trading partners has led to a growth in maize exports (Figure 19).

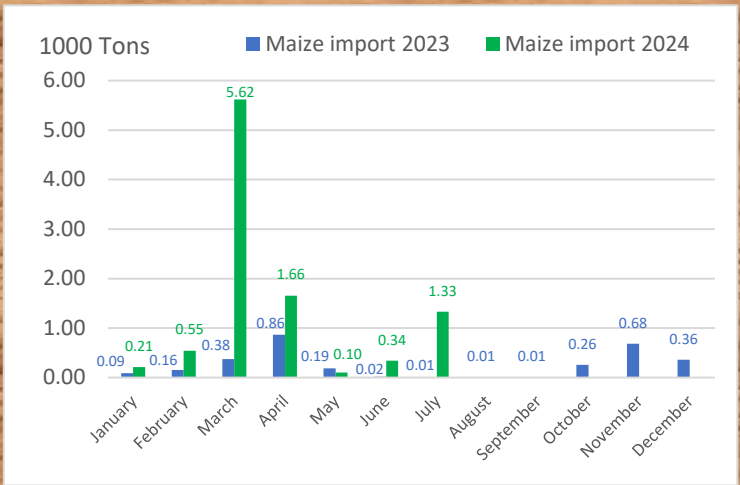


Figure 18: Monthly quantity of maize import in 2023 - 2024

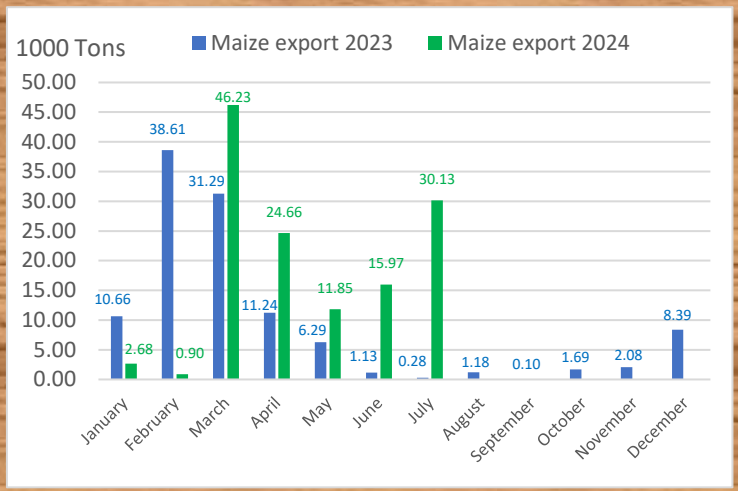


Figure 19: Monthly quantity of maize export in 2023 - 2024

For sugarcane in 2025, the planted area and production are expected to increase. The planted area is expected to increase due to higher prices of competing crops and supportive government policies. The production is expected to increase due to improved crop management by farmers and high-quality varieties. The harvesting period for sugarcane in 2025 is projected to be from January 2025 to May 2025. Both imports and exports of sugar are expected to increase. The increase in domestic demand is expected to increase sugar imports (Figure 20). Additionally, growing demand from trading partners has led to rise in sugar exports (Figure 21).

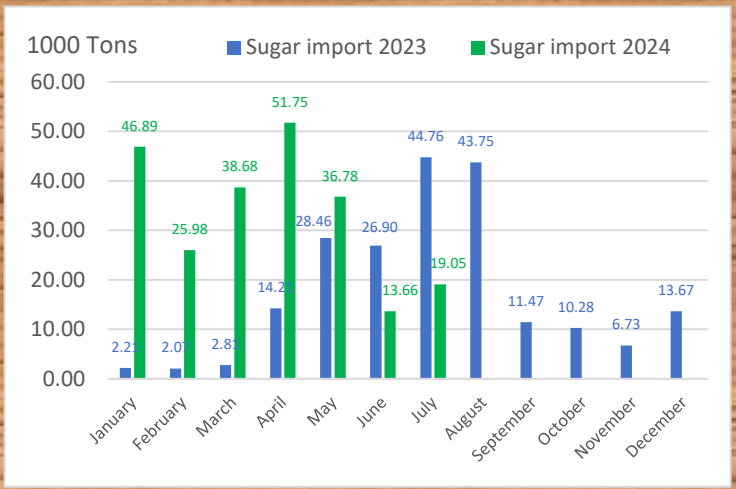


Figure 20: Monthly quantity of sugar import in 2023 -2024

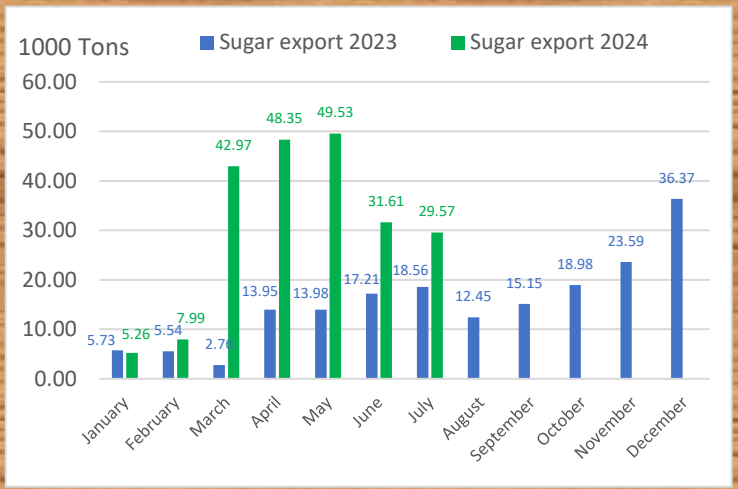


Figure 21: Monthly quantity of sugar export in 2023 -2024

LAO PDR

Crop Situation in 2025 (P.3/3)

For soybean in 2025, the planted area is expected to decrease due to rising prices of competing crops and rainfall. Soybean production is also anticipated to decline, influenced by unfavorable weather conditions and the reduction in planted area. The soybean harvesting period in 2025 is projected to be from September 2024 to November 2024 for the wet season and from February 2025 to March 2025 for the dry season. Both imports and exports of soybeans are expected to increase. The rise in domestic demand has driven up soybean imports 2024 (Figure 22). Additionally, soybean exports are expected to fluctuate in 2024 (Figure 23).

For cassava in 2025, the planted area and production are expected to decrease due to rising prices of competing crops and flooding, which has damaged 426 hectares of cassava fields. The harvesting period for cassava in 2025 is anticipated to run from December 2024 to March 2025. The import and export dynamics for cassava are decreasing in 2024. The reduction in domestic demand has led to a decrease in cassava imports (Figure 24), while high demand from trading countries has resulted in an increase in cassava exports during March to July 2024 (Figure 25).

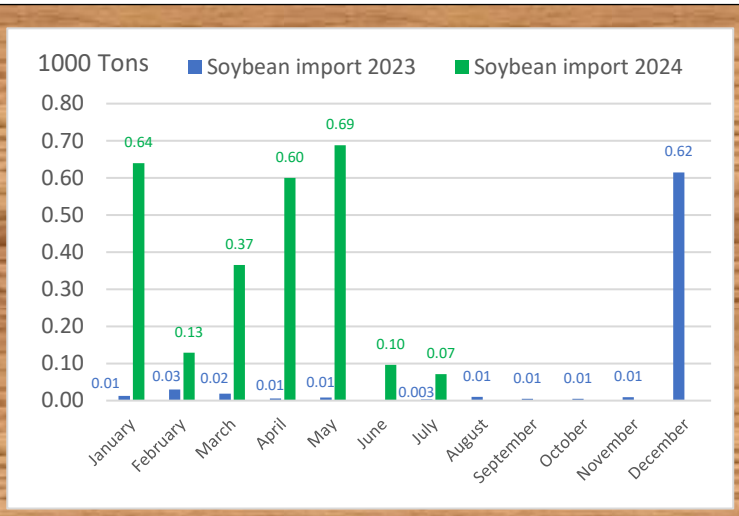


Figure 22: Monthly quantity of soybean import in 2023 - 2024

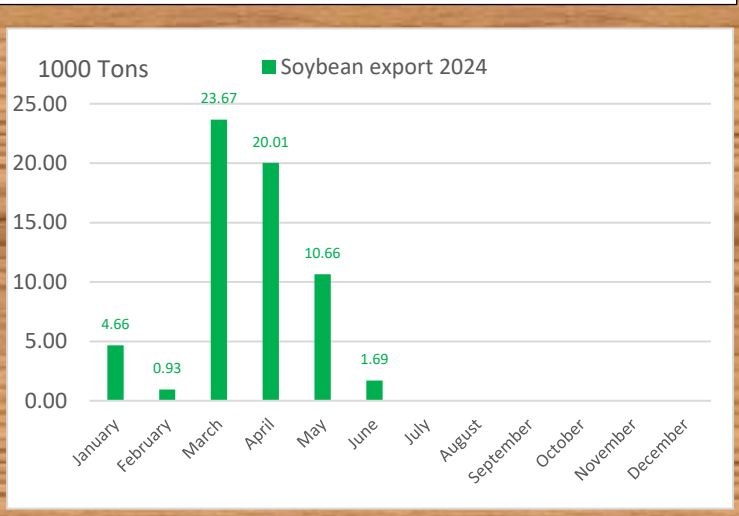


Figure 23: Monthly quantity of cassava export in 2024

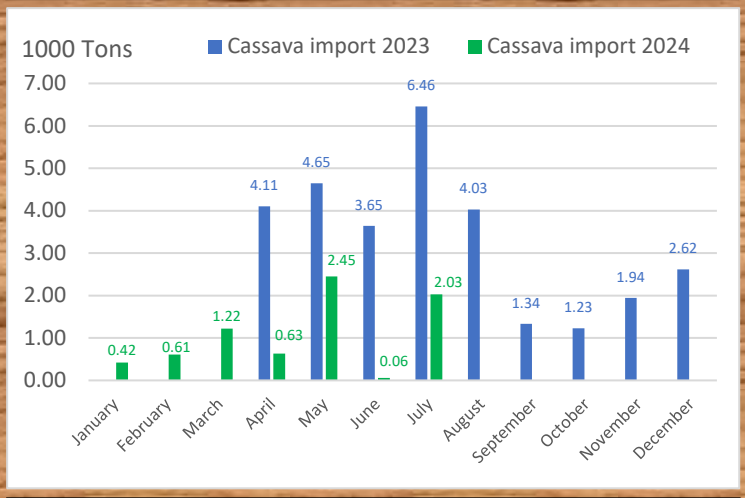


Figure 24: Monthly quantity of cassava import in 2023 - 2024

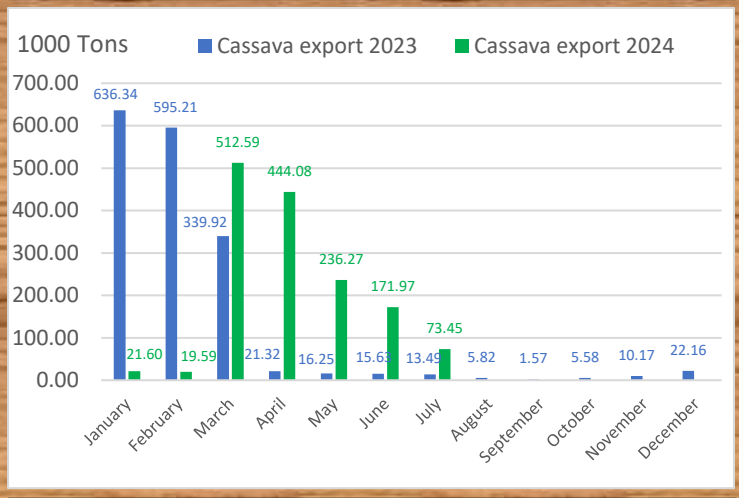


Figure 25: Monthly quantity of cassava export in 2023 - 2024

MALAYSIA

Crop Situation in 2025 (P. 1/3)

There is no available forecast for Malaysia in 2025 at this time. However, in 2024, Malaysia is expected to face severe natural disasters, particularly floods, which are predicted to cause significant damage across several provinces. The affected areas include the State of Kelantan (Tanah Merah, Tumpat, Machang, Pasir Mas, Pasir Puteh, Kota Bharu and Bachok), the State of Pahang (Pekan and Rompin), the State of Terengganu (Besut, Kuala Nerus, Kuala Terengganu, Setiu and Marang), the State of Sabah (Keningau and Kota Marudu), the State of Selangor (Kuala Selangor and Sabak Bernam), the State of Perak (Kerian, Hilir Perak, Perak Tengah and Kuala Kangsar), the State of Melaka (Alor Gajah), and the State of Johor (Batu Pahat). Additionally, drought conditions have affected regions in the State of Kelantan (Tanah Merah, Tumpat, Machang, Pasir Mas, Pasir Puteh, Kota Bharu and Bachok), the State of Kedah (Langkawi, Pendang, Pokok Sena, Padang Terap and Kubang Pasu), the State of Sabah (Keningau, Papar, Beaufort, Nabawan, Tuaran and Kota Belud), and the State of Melaka (Melaka Tengah). In 2024, a total of 21,594.58 hectares of rice land have been damaged due to climate change or global warming, with approximately 17,373.87 hectares (80% of the total damaged areas) being directly impacted by these environmental factors.

In 2024, the import volumes for rice, sugar, and cassava have increased while imports of maize and soybeans have declined. The rise in rice and cassava imports is driven by factors such as population growth and evolving consumer preferences aimed at meeting domestic demand (Figures 26 and 34). Similarly, the increase in sugar imports is attributed to shifting consumer preferences (Figure 30). On the other hand, the decrease in maize imports is expected due to factors like higher domestic production, changes in livestock feed preferences, and fluctuations in global maize prices (Figure 28). The decline in soybean imports is also linked to a reduction in demand for soybeans (Figure 32).

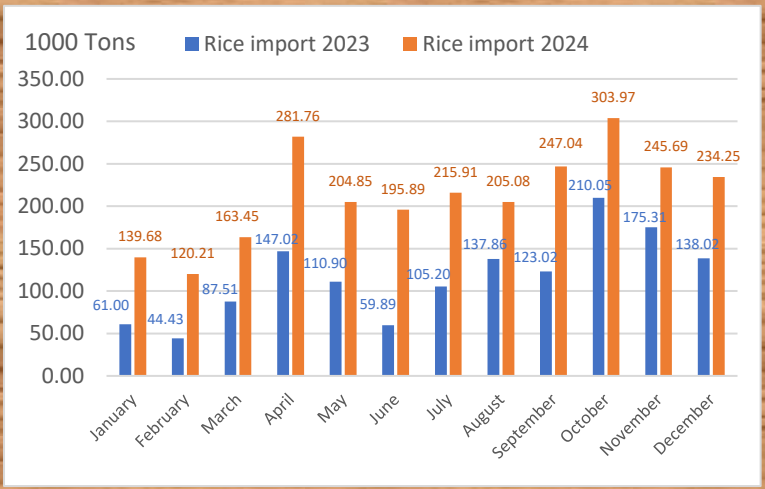


Figure 26: Monthly quantity of rice import in 2023 – 2024

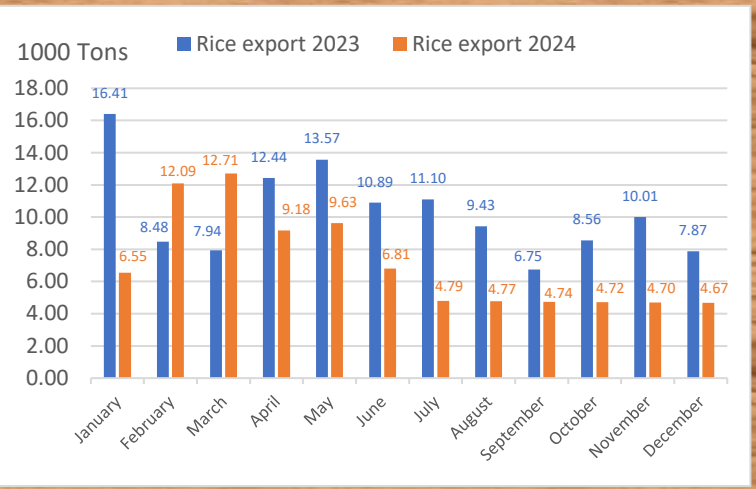


Figure 27: Monthly quantity of rice export in 2023 -2024

MALAYSIA

Crop Situation in 2025 (P. 2/3)

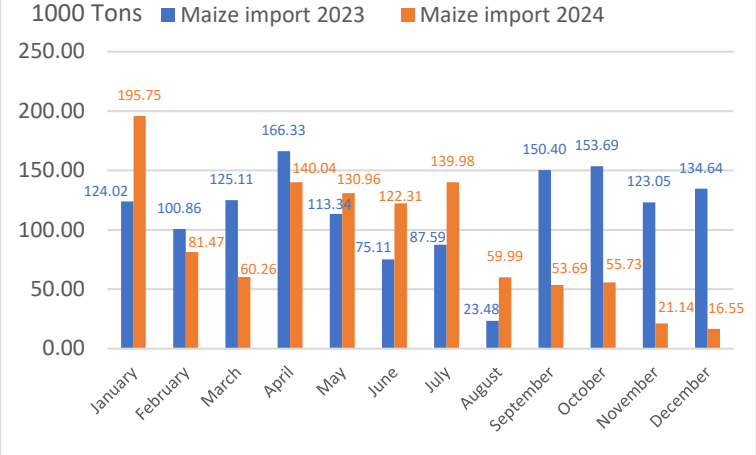


Figure 28: Monthly quantity of maize import in 2023 -2024

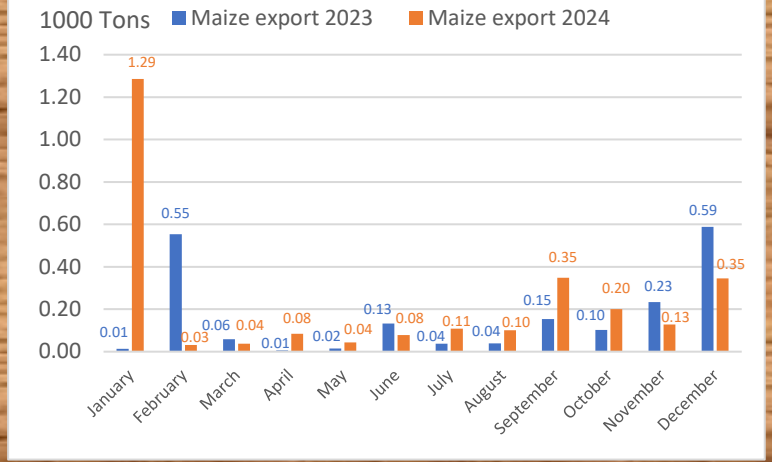


Figure 29: Monthly quantity of maize export in 2023 -2024

In 2024, Malaysia's agricultural sector is expected to exhibit distinct export trends. Exports of rice, maize, sugar, and cassava are projected to increase compared to 2023, while soybean exports are anticipated to decline. The increase in rice exports is driven by rising global demand for local rice varieties (Figure 27). Similarly, maize, sugar, and cassava exports are expected to grow due to higher demand in foreign markets (Figure 29, 31 and 35). Conversely, the decrease in soybean exports is expected due to decrease in demand for soybean from trading partner in 2024 (Figure 33).

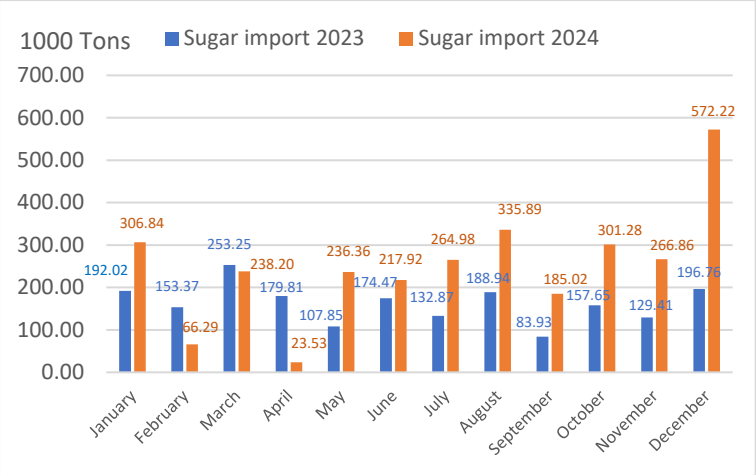


Figure 30: Monthly quantity of sugar import in 2023 -2024

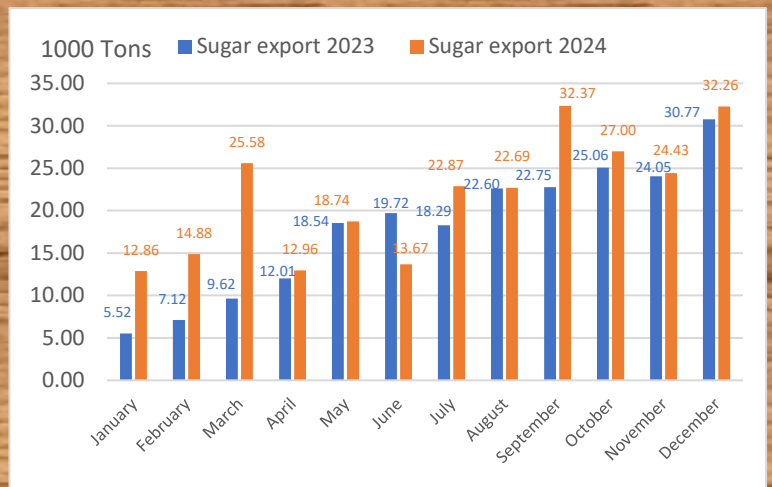


Figure 31: Monthly quantity of sugar export in 2023 -2024

Crop Situation in 2025 (P. 3/3)

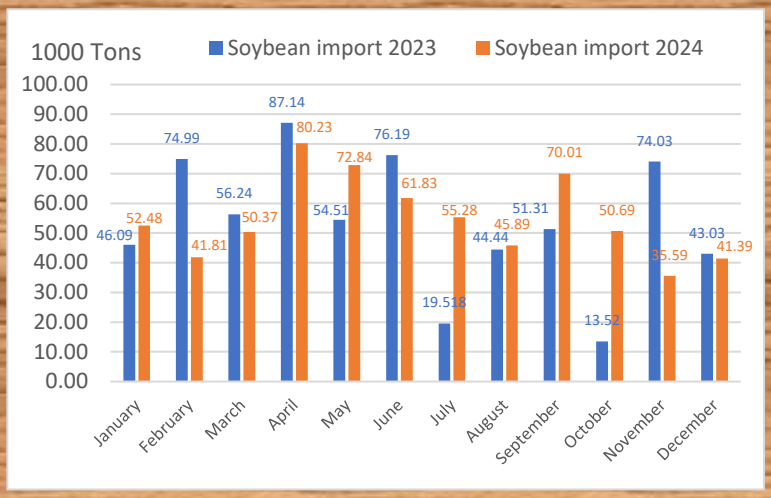


Figure 32: Monthly quantity of soybean import in 2023 -2024

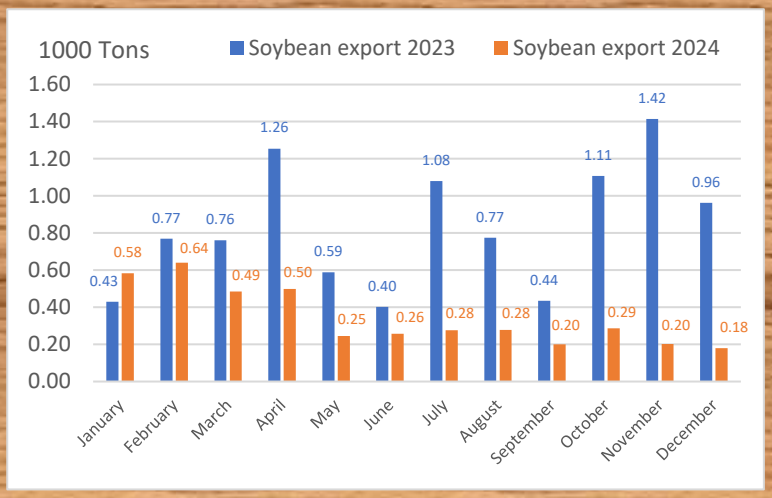


Figure 33: Monthly quantity of soybean export in 2023 -2024

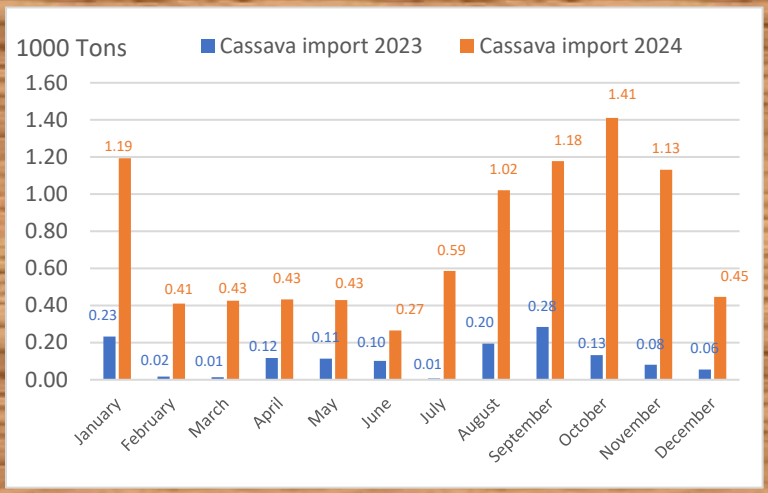


Figure 34: Monthly quantity of cassava import in 2023 -2024

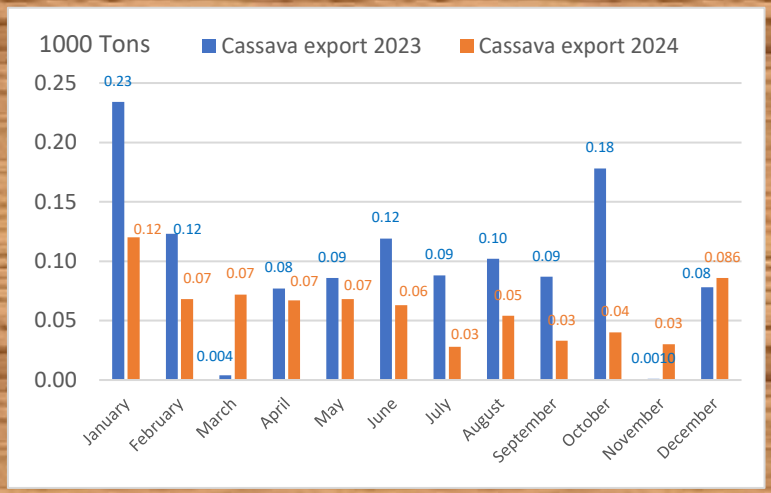
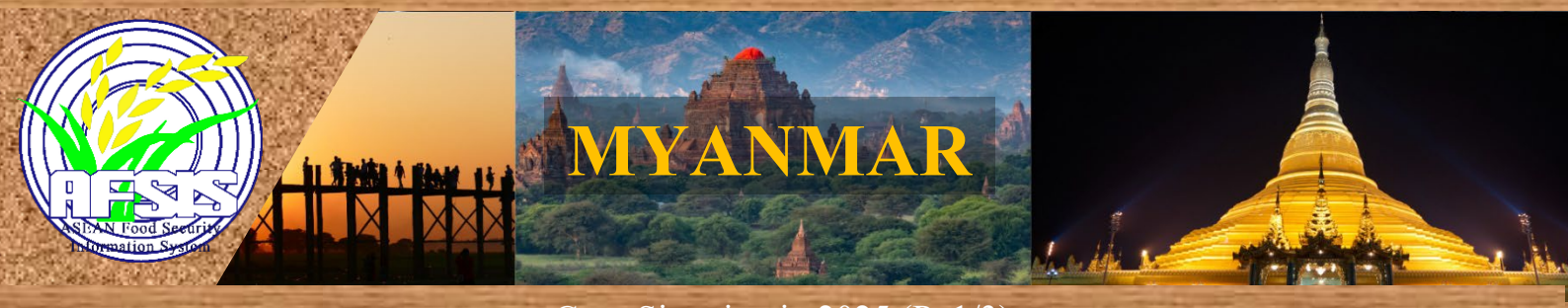


Figure 35: Monthly quantity of cassava export in 2023 -2024



Crop Situation in 2025 (P. 1/3)

Myanmar is expected to experience generally favorable weather conditions in 2025 (2024/2025), with adequate irrigation and sufficient sunlight for crops. Moderate rainfall is anticipated in several regions, ranging from 20 to 50 millimeters per day, with some areas receiving up to 100 millimeters per day. However, abnormal rainfall during the rainy season is expected in the Delta and lowland regions, while drought conditions are projected in the Dry Zone regions. The impacts of climate change and global warming continue to affect Myanmar, resulting in extreme droughts, heavy rainfall, and higher-than-usual temperatures. Despite the generally favorable weather, certain regions may still face natural disasters in 2024. These include floods in Naypyitaw, Kachin, Kayin, Tanintharyi, Bago, Magwe, Mon, Yangon, Shan, and Ayeyarwady, as well as droughts in Magwe and Mandalay. Riverbank collapses are expected in Sagaing. The damage from these disasters is projected to result in the loss of 96,660 hectares of rice, 1,753 hectares of maize, 303 hectares of soybean crops, and 279 hectares of cassava.

To mitigate the effects of climate change and global warming on agriculture, farmers can implement several strategies to minimize risks and potential damage from natural disasters. These strategies include adjusting their cultivation plans and planting times to better align with shifting weather patterns, as well as using crop varieties that are more resistant to climate change. The Myanmar government is aiding these efforts by providing farmers with access to new technologies, improving water management practices to reduce the impact of natural disasters, and expanding access to credit.

The data for all five commodities in 2025 is not yet available due to the ongoing crop season. The changing in planted area and production of crops cannot be determined at this time because the 2025 crop season has not concluded. Further updates will likely be provided once the season progresses and more data becomes available.

For rice situation in 2024, the rice planted area is expected to increase due to the farmer responding to price increases by expanding cultivation and taking advantage of favorable weather conditions with abundant sunlight. The harvesting periods for rice in 2025 are expected to be from September 2024 to March 2025 for the wet season and from February 2025 to August 2025 for dry season. The export situation may improve due to the anticipated increase in production (Figure 36).

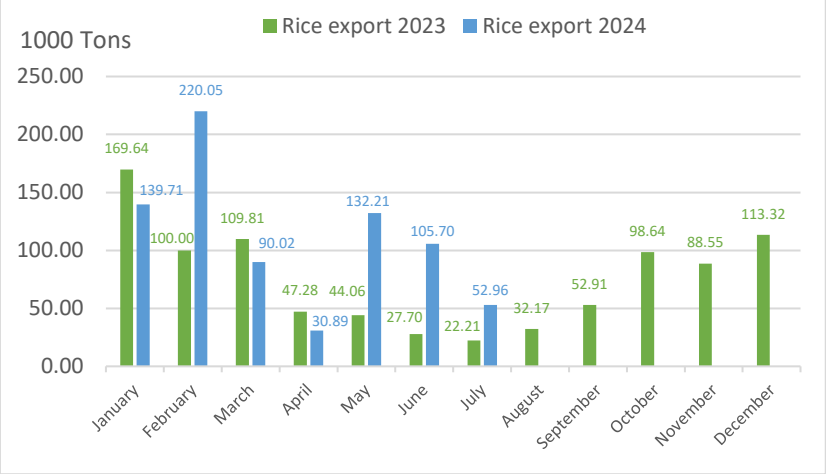


Figure 36: Monthly quantity of rice export in 2023 - 2024

Crop Situation in 2025 (P. 2/3)

For maize situation in 2024, the production is expected to increase with an expansion in planted areas due to farmers' favorable response to price increases and advantageous weather conditions, marked by sufficient sunlight. The harvesting periods for maize in 2025 are anticipated to be from August 2024 to December 2024 for the wet season and from January 2025 to June 2025 for the dry season. Both imports and exports are increasing, as maize import is needed for domestic food security, and maize export is expected to increase in increase production. (Figure 37-38).

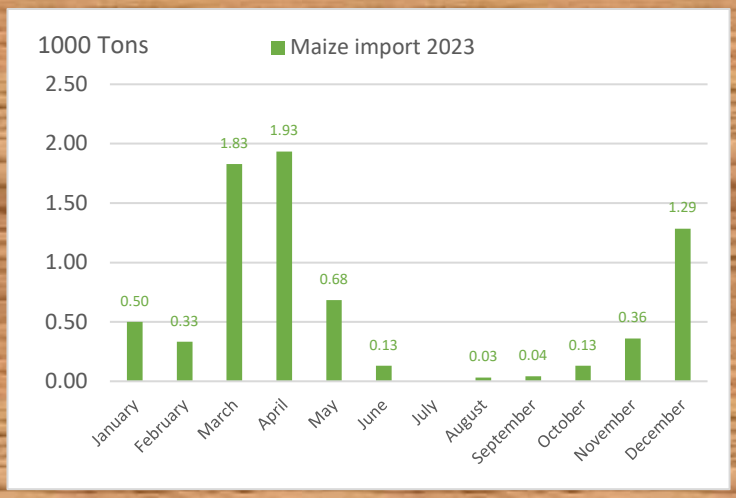


Figure 37: Monthly quantity of maize import in 2023

Figure 38: Monthly quantity of maize export in 2023 - 2024

For sugarcane situation in 2024, sugarcane cultivation is expected to experience growth in planted areas, driven by farmers' positive response to price increases and favorable weather conditions, including ample sunlight. The harvesting period for sugarcane in 2025 stretched from November 2024 to March 2025. Additionally, sugar exports are expected to decrease due to fewer orders for export items (Figure 39).

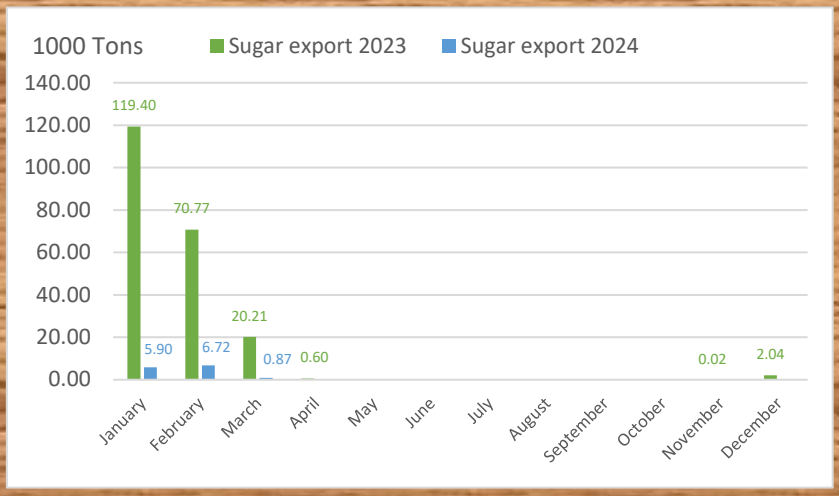
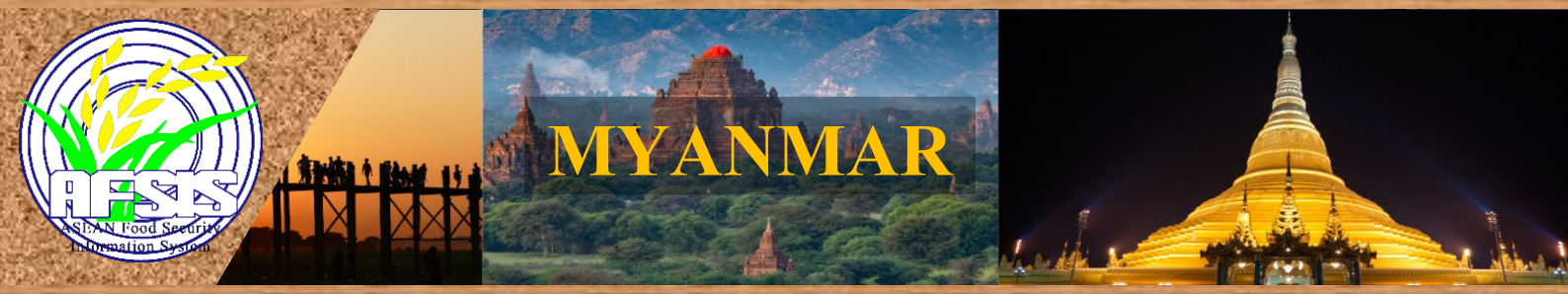


Figure 39: Monthly quantity of sugar export in 2023 - 2024



Crop Situation in 2025 (P. 3/3)

For soybean situation in 2024, the soybean planted area is expected to increase because farmers respond to price increases by expanding cultivation and taking advantage of favorable weather conditions with abundant sunlight. The harvesting periods for soybeans in 2025 span from August 2024 to December 2024 for the wet season and from January 2025 to March 2025 for dry season. Soybean imports have increased due to high demand for domestic food security (Figure 40). Despite, soybean exports have decrease due to fewer orders for export items. (Figure 41).

For cassava situation in 2024, the production is expected to increase with a rise in planted areas due to farmers' responsiveness to price increases and the presence of favorable weather conditions, characterized by ample sunlight. The harvesting period for cassava in 2025 is between September 2024 and June 2025. The situation regarding imports and exports has seen an increase. Cassava imports have increased due to high demand for domestic food security (Figure 42). However, cassava exports are expected to decrease due to fewer orders for export items (Figure 43).

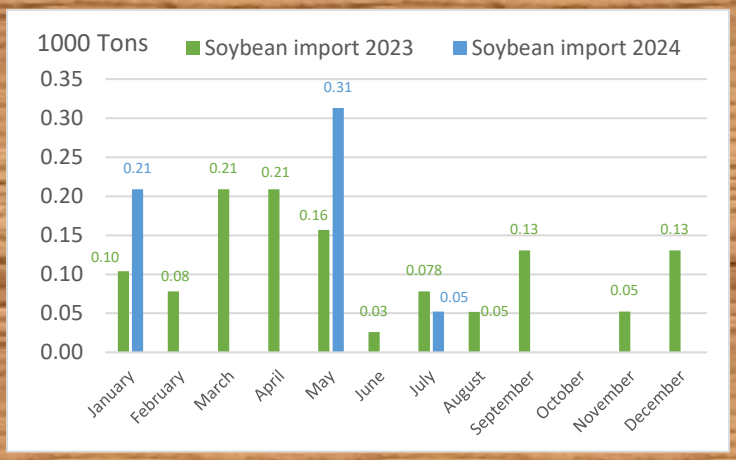


Figure 40: Monthly quantity of soybean import in 2023 - 2024

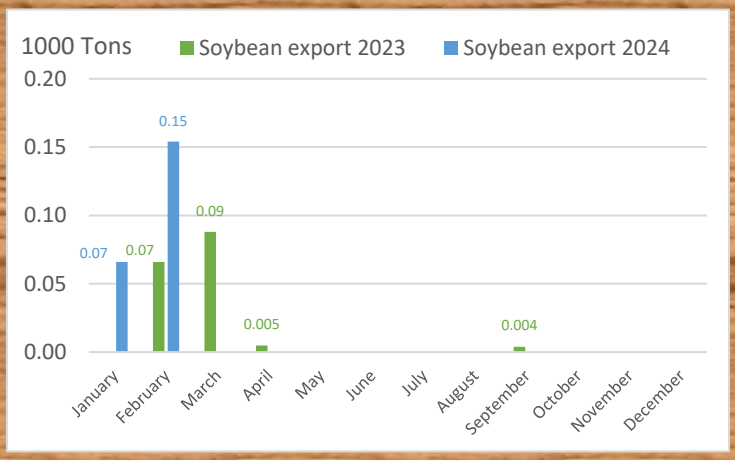


Figure 41: Monthly quantity of soybean export in 2023 - 2024

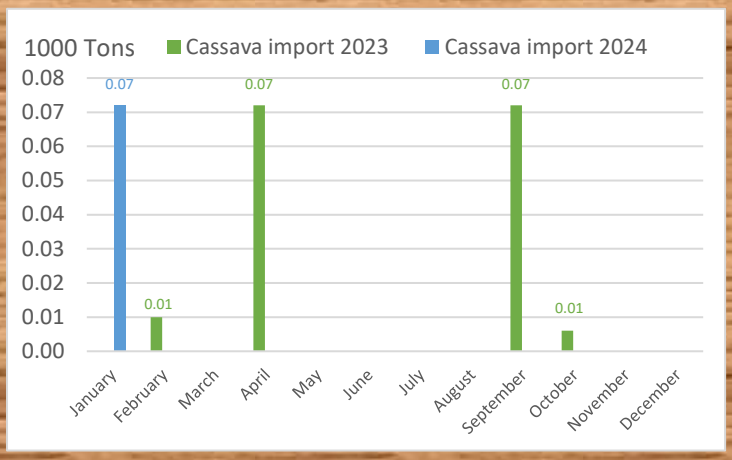


Figure 42: Monthly quantity of cassava import in 2023 - 2024

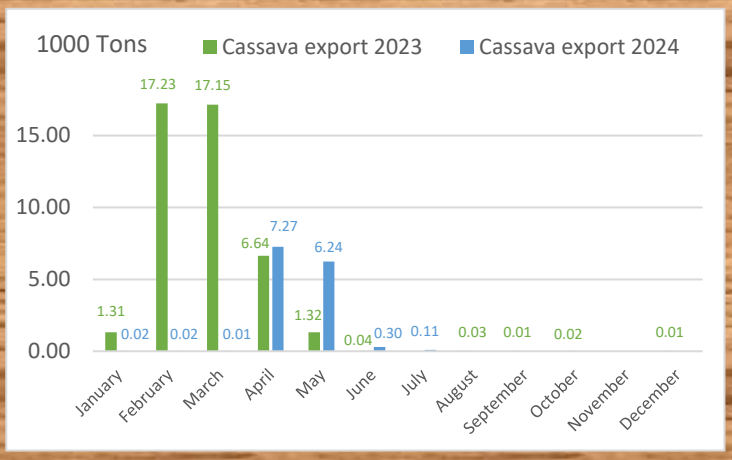


Figure 43: Monthly quantity of cassava export in 2023 - 2024

The Philippines

Crop Situation in 2025 (P.1/3)

In 2025 (2024/25), there is no available information regarding the expected weather conditions for 2024 or predictions for 2025. Additionally, data on damaged areas caused by weather-related events or other natural disasters are not available for this period.

For rice in 2025, data on the planted area is not available. The production in the Philippines is estimated to decrease. This decline is primarily attributed to unfavorable weather conditions, including a prolonged period of dry weather and insufficient water supply from irrigation. The trend of rice imports in 2024 is higher than in 2023 (Figure 44). However, rice exports have shown a significant decline, with fewer reports of export data in 2024 (Figure 45). The harvesting periods for rice in 2025 is from July 2024 to December 2024 for wet season and, and from January 2025 to June 2025 for dry season.

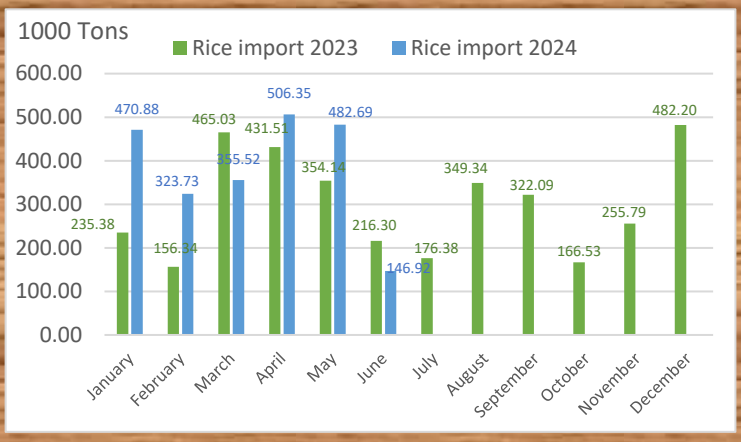


Figure 44: Monthly quantity of rice import in 2023 - 2024

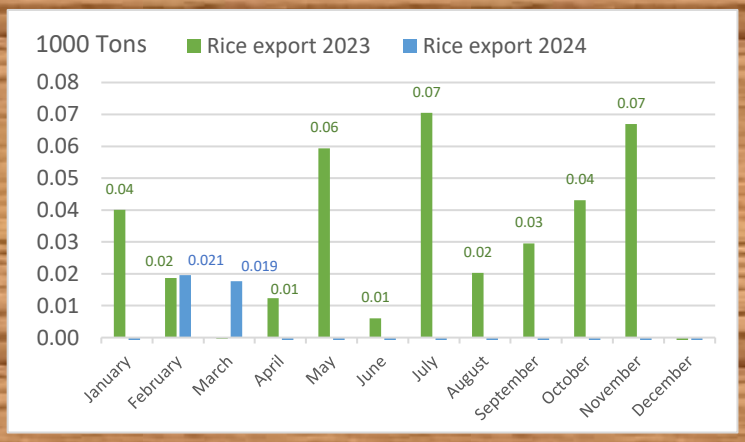


Figure 45: Monthly quantity of rice export in 2023 -2024

For soybean in 2025, the soybean production is expected to decrease due to unfavorable weather conditions and insufficient water supply. The trend of soybean imports is expected to decrease in 2024 compared to 2023 (Figure 46). The harvesting period for soybean in 2024 was from July 2023 to December 2023 in wet season while the dry season was in January 2024 to June 2024.

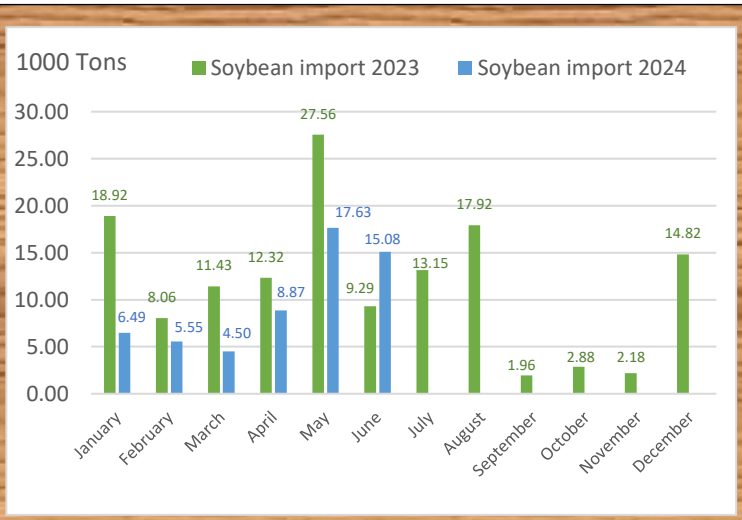


Figure 46: Monthly quantity of soybean import in 2023 - 2024

The Philippines

Crop Situation in 2025 (P.2/3)

For maize in 2025, data on the planted area is not available, with only production data officially released. Maize production is estimated to decrease due to a prolonged dry spell, leading to smaller cobs being produced. The trend of maize imports is expected to increase in 2024 compared to 2023 (Figure 47). Additionally, the maize exports are also projected to see an upward trend in 2024 compared to 2023 (Figure 48) The harvesting periods for maize in 2025 is July 2024 to December 2024 for wet season, and from January 2025 to June 2025 for dry season.

For sugarcane in 2025, data on the area planted is not available for the crop year 2024/2025. Regarding crop year for 2023-2024, the actual production of raw sugar reached 1.922 million metric tons, exceeding the previous crop year by 120,000 MT. However, the Sugar Regulatory Administration (SRA) issued Sugar Order #5, Series of 2023-2024, allowing the importation of 240,000 MT of refined sugar for maintain sufficient supply and a buffer stock. Moreover, the El Niño phenomenon's potential impact for crop year 2024-2025 was a key factor in the issuance of SO# 5. The latest data for raw and refined sugar imports has not been updated, and the specific numbers for sugar imports and exports in 2024 are not yet available. (Figure 49-50). The sugarcane harvesting period for 2025 is scheduled from September 2024 to August 2025.

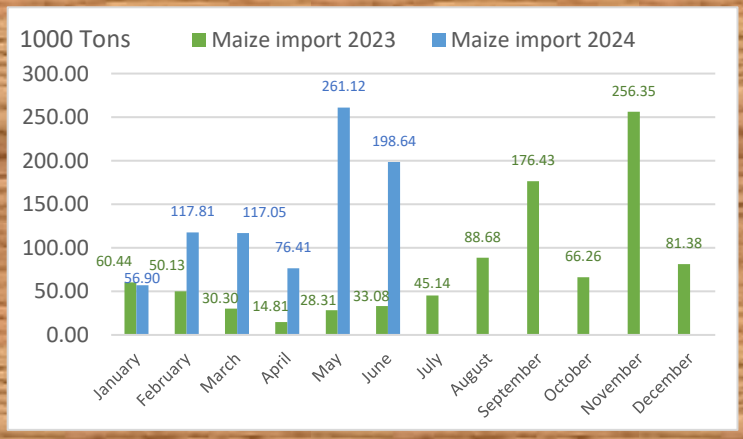


Figure 47: Monthly quantity of maize import in 2023 - 2024

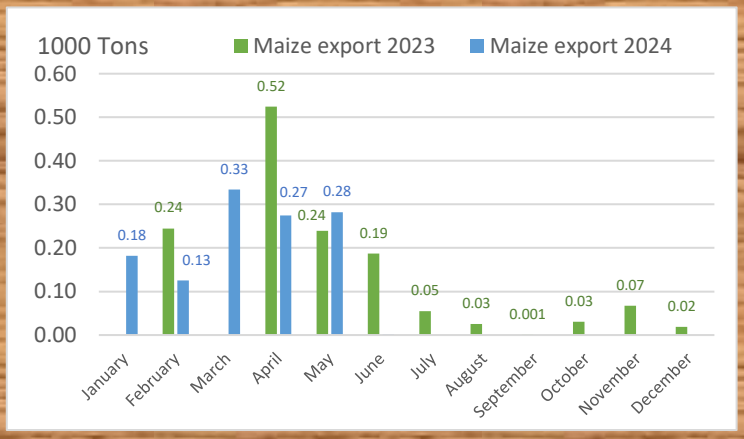


Figure 48: Monthly quantity of maize export in 2023 - 2024

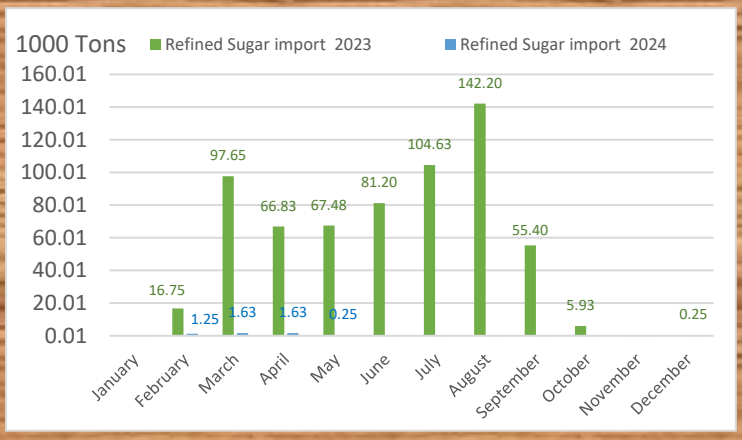


Figure 49: Monthly quantity of refine sugar import in 2023 - 2024

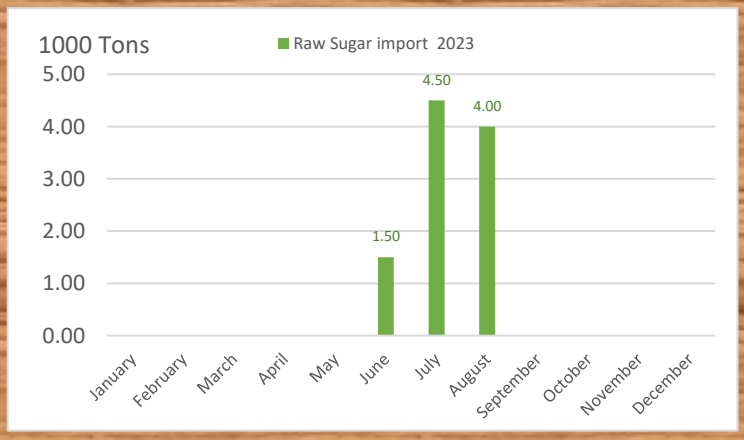


Figure 50: Monthly quantity of raw sugar import in 2023

The Philippines

Crop Situation in 2025 (P.3/3)

For cassava in 2025, production is expected to decrease due to unfavorable weather conditions and insufficient water supply. The trend of cassava imports and exports in 2024 is anticipated to increase compared to 2023 (Figure 51-52). The harvesting periods for cassava in 2024 were from July 2023 to December 2023 for the first crop and from January 2024 to June 2024 for the second crop.

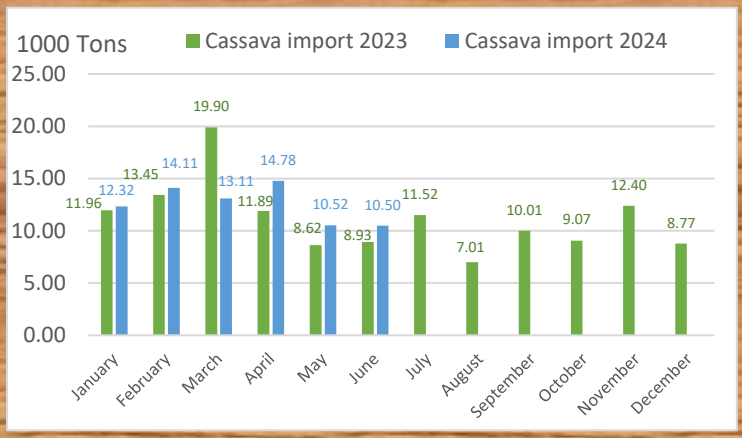


Figure 51: Monthly quantity of cassava import in 2023 - 2024

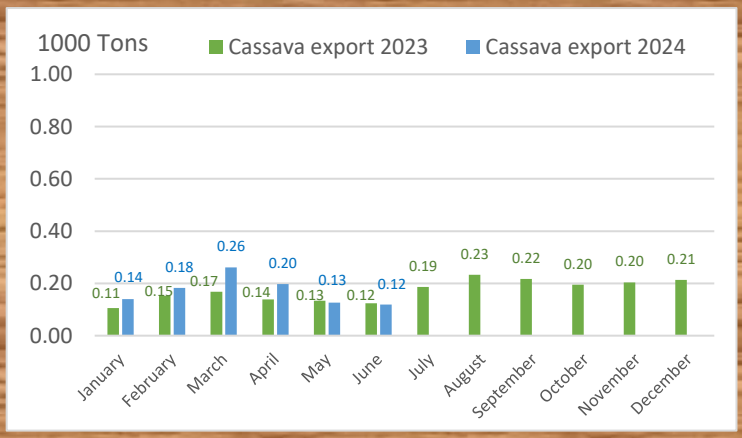


Figure 52: Monthly quantity of cassava export in 2023 - 2024

Crop Situation in 2025 (P.1/3)

In 2025 (2024/2025), Thailand is forecasted to experience generally sufficient water availability, with appropriate levels of rainfall and sunlight for agricultural needs. However, rainfall has been notably low, ranging from 0.5 to 20 millimeters per day, significantly below the usual levels. From January to June 2024, monthly rainfall was lower than average, accompanied by higher temperatures compared to the previous year. According to the Meteorological Department, La Niña is expected to impact Thailand from July to January 2025, bringing more rainfall than usual to the northern and northeastern regions, particularly until October. The temperature during winter is forecasted to be cooler than last year. Despite this, global warming and the El Niño phenomenon have contributed to extreme drought conditions across the country during the first half of 2024 (2023/2024). Natural disasters reported include floods in the northern, northeastern, and central regions during the raining season in 2024. Additionally, there have been reports of crop diseases, such as cassava mosaic disease in the northeastern region, and pest outbreaks, including the coconut black-headed caterpillar in the central and southern regions. The total affected area three commodities are 300,000 hectares for rice, 5,000 hectares for maize, and 110,000 hectares for cassava.

To mitigate the effects of climate change or global warming, farmers can adopt strategies to reduce risks and potential damage from natural disasters. These strategies include adjusting their cultivation plans or changing planting times to better align with shifting weather patterns. Additionally, farmers can implement water allocation plans for the agricultural sector, prepare to find reserve water sources, and promote the cultivation of crops that require less water.

For rice in 2025, the planted area for rice is forecasted to decrease due to drought conditions and increase in the price of competing crops. However, rice production is expected to increase due to favorable weather and improved crop management by farmers. The harvesting period for rice in 2025 is expected to harvest from August 2024 to April 2025 for the wet season, and from February 2025 to October 2025 for the dry season. Additionally, rice exports are forecasted to increase as the global economy continues to expand. However, the drought crisis caused by the El Niño phenomenon, expected to have an impact from mid-2023, may lead to an increased demand for rice imports from Thailand as foreign countries face production challenges (Figures 53-54).

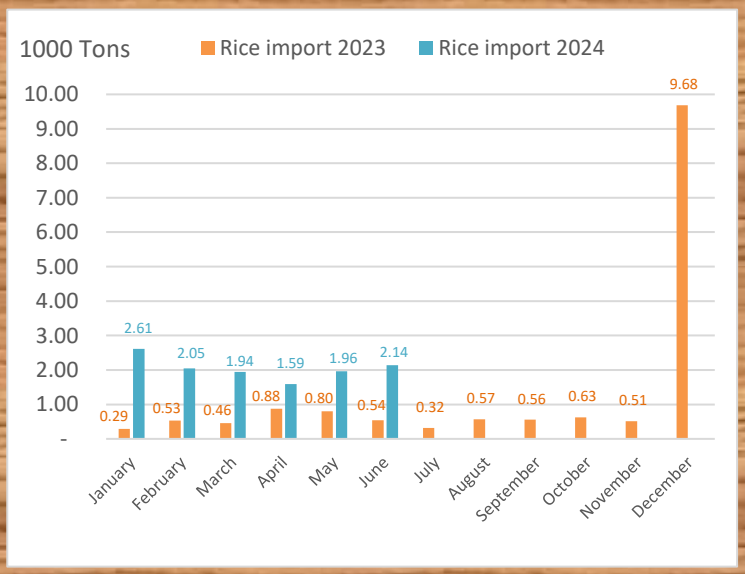


Figure 53: Monthly quantity of rice import in 2023 - 2024

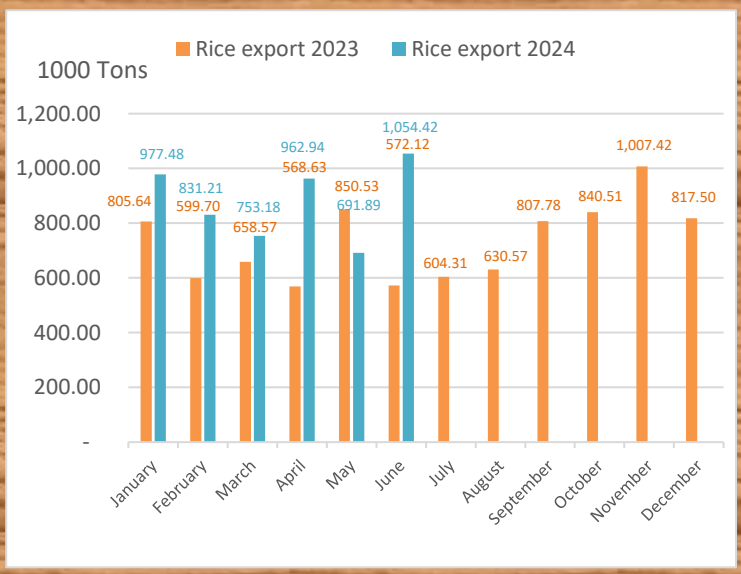


Figure 54: Monthly quantity of rice export in 2023 - 2024

Crop Situation in 2025 (P.2/3)

For maize in 2025, the decrease of planted area is forecasted to decrease due to the price of competing crop increase and increasing in planting cost. The increase in production can also be forecasted to favorable weather and sufficient water. The maize harvesting period is from February to May 2024 for the dry season and from June 2024 to February 2025 for the wet season. The imports of maize are expected to increase due to Thailand's demand for animal feed corn has been continuously increasing, driven by the expansion of the livestock industry. However, domestic production of animal feed corn remains insufficient to meet this growing demand. As a result, Thailand has been importing animal feed corn from neighboring countries, particularly from Myanmar, Lao PDR, and Cambodia, to fulfill its need (Figure 55-56).

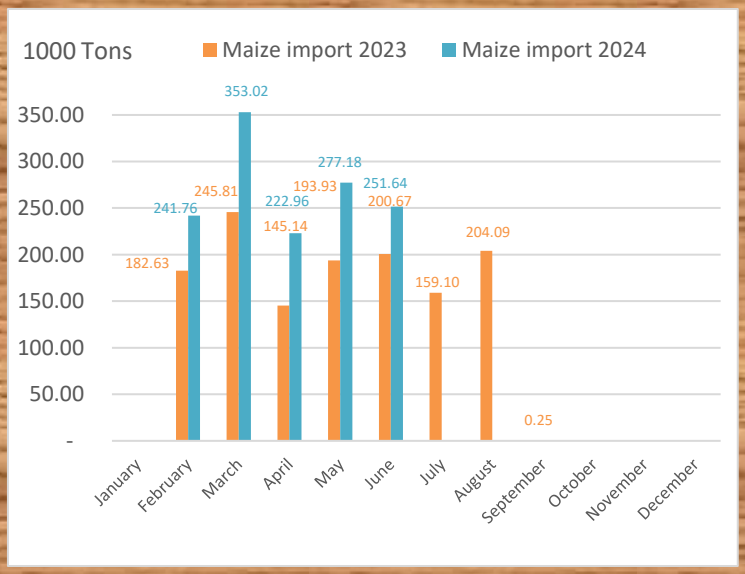


Figure 55: Monthly quantity of maize import in 2023 - 2024

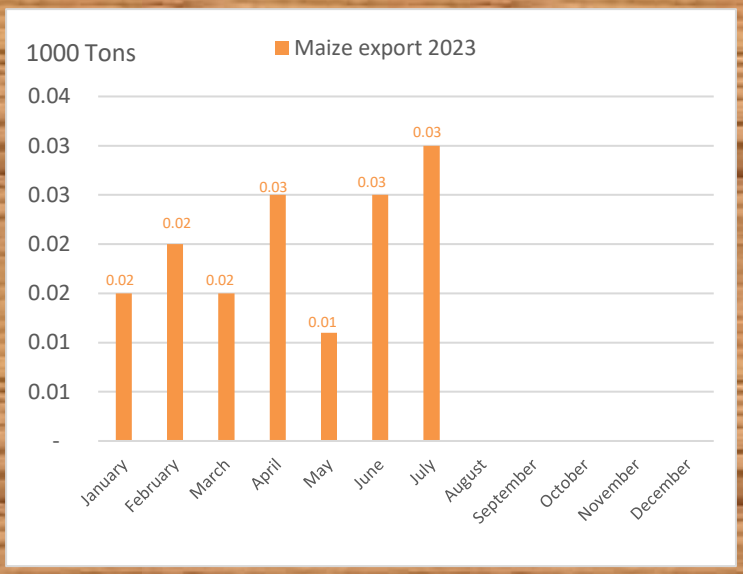


Figure 56: Monthly quantity of maize export in 2023

For sugarcane in 2025, both planted areas and production is forecasted to increase. The increase in planted area is attributed to farmers responding to price increases. Additionally, sugarcane production is expected to grow due to favorable weather conditions and improved crop management practices. The sugarcane harvesting period in 2025 is forecasted to occur from December 2024 to April 2025. Regarding sugar imports, an increase is anticipated due to insufficient domestic production and rising domestic demand from the expansion of related industries such as food, beverages, medicine, and medical supplies (Figure 57). On the export side, a decrease is expected due to the decline in domestic production caused by drought and government measures aimed at controlling sugar exports (Figure 58).

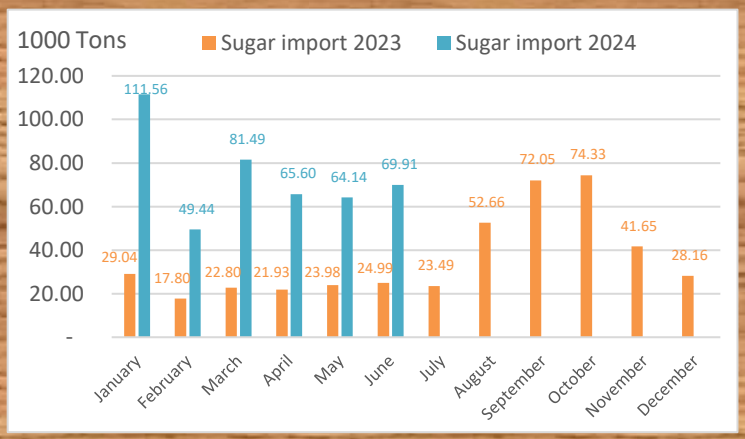


Figure 57: Monthly quantity of sugar import in 2023 - 2024

Figure 58: Monthly quantity of sugar export in 2023 - 2024

Crop Situation in 2025 (P.3/3)

In soybean in 2025, the soybean situation is forecasted to see a decline in both planted area and production. The reduction in planted area is attributed to several factors, including the crop's difficulty in cultivation, a shortage of seeds, insufficient labor for harvesting, and low returns, which discourage farmers from growing soybeans. Additionally, soybean production is expected to decrease further due to drought conditions. The soybean harvesting period is projected to run from January to May 2024 for the dry season and from July 2024 to December 2024 for the wet season. Soybean imports are expected to rise as domestic supply falls short of meeting the increasing demand, prompting entrepreneurs to import more soybeans to fill the gap (Figures 59-60).

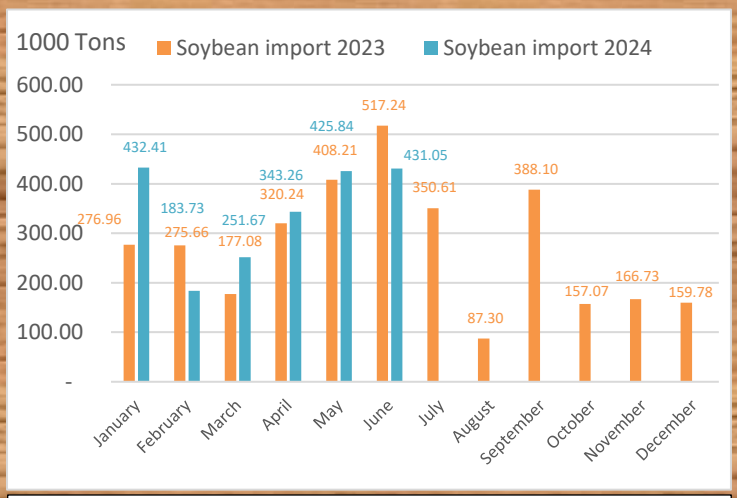


Figure 59: Monthly quantity of soybean import in 2023 - 2024

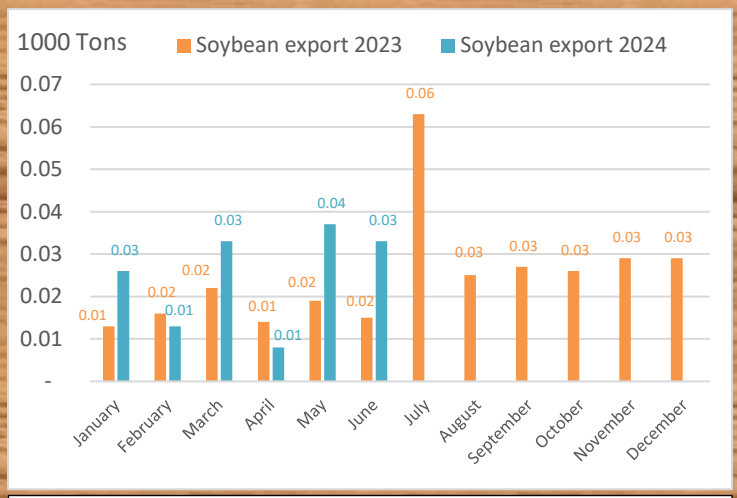


Figure 60: Monthly quantity of soybean export in 2023 - 2024

In cassava in 2025, the cassava situation is forecasted to experience growth in both planted area and production. The increase in planted area is driven by farmers responding to higher prices. Cassava production is also expected to rise, supported by favorable weather conditions. The harvesting period for cassava in 2025 is projected to run from October 2024 to September 2025. Imports of cassava are anticipated to increase as domestic production remains insufficient to meet the needs of entrepreneurs (Figure 61). However, a decrease in exports is expected due to a reduced demand for cassava pulp as a raw material for ethanol production. China's shift towards coal-fired ethanol production, aimed at enhancing energy security and reducing dependence on imported energy, has contributed to this decline in demand (Figure 62).

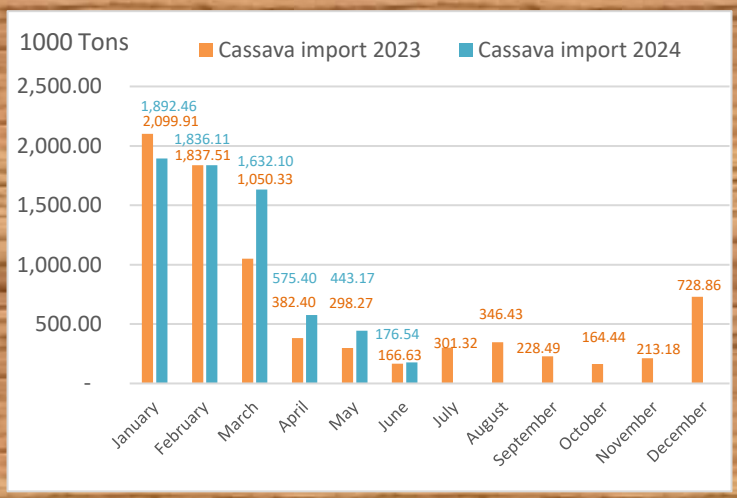


Figure 61: Monthly quantity of cassava import in 2023 - 2024

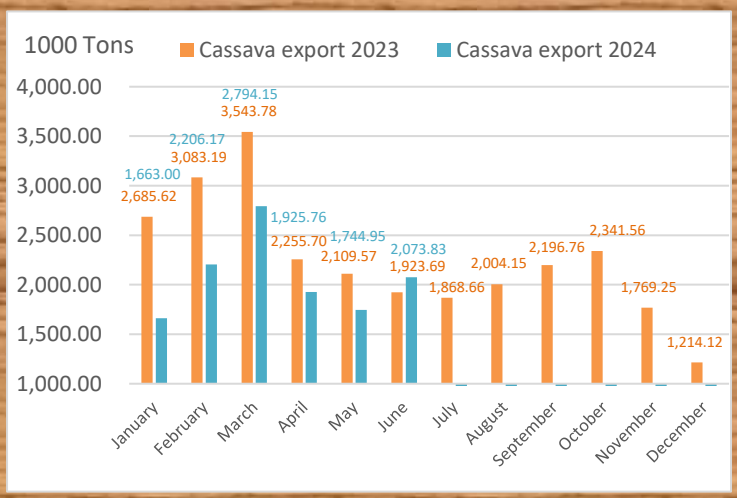


Figure 62: Monthly quantity of cassava export in 2023 - 2024

Crop Situation in 2025 (P.1/4)

In September, Vietnam was affected by many types of natural disasters across the country, the most significant of which was the impact of storm No. 3 - internationally known as Yagi, along with heavy rains, floods, flash floods, landslides, rockslides, and inundation in the Northern and Central regions. These types of natural disasters caused huge losses in human lives and property. Vietnam's agricultural production (especially in the Northern region) was severely affected with estimated damages including: 258 thousand hectares of rice, 59 thousand hectares of other crops, 35 thousand hectares of fruit trees, 205 thousand hectares of other crops flooded, affected, or damaged; 31 thousand hectares of aquaculture area and 8 thousand cages damaged, swept away; 39 thousand livestock, 4.5 million poultry died, swept away. The total estimated damage was over 80 thousand billion VND. Export value of Vietnam's AFF sector is projected to increase by 21% in the first 9 months of 2024 increase by higher exports to important markets such as China, the U.S, and Japan. Similarly, the import value of the AFF sector is estimated to rise by 7.5% as a result of higher imports from China, Brazil, and the U.S. However, the decline in the agricultural production due to the impact of Typhoon Yagi and other natural disasters that occurred in September is likely to have a negative impact on Vietnam's NLTS imports and exports in the last months of 2024.

For Rice in 2024, Vietnam's dry season rice production is expected to decline compared to 2023 due to the impact of Typhoon Yagi and Typhoon Soulik in September, which flooded more than 258 thousand hectares of dry season rice in northern Vietnam. Wet season rice yields are expected to be similar to 2023. Regarding trade, rice export in the first eight months of 2024 increased by 5.9% in volume and 21.7% in value. Vietnam's rice export is forecast to continue increasing due to demand from importing countries and an increase in average export prices (Figure 64 - 65).

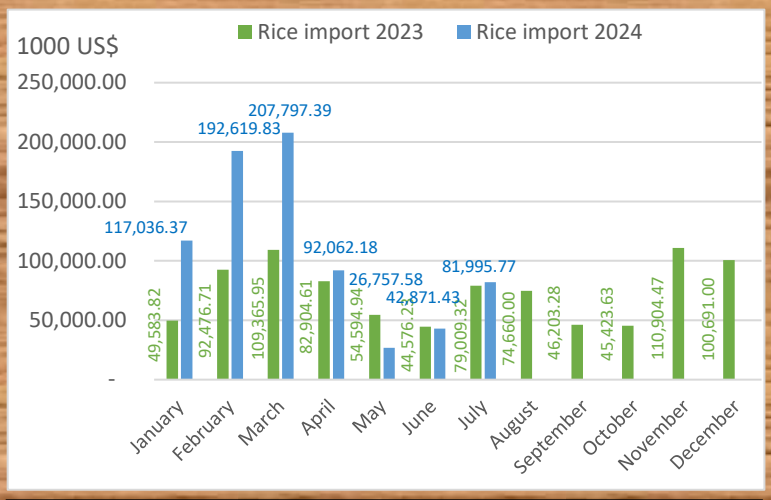


Figure 64: Monthly value of rice import in 2023 – 2024

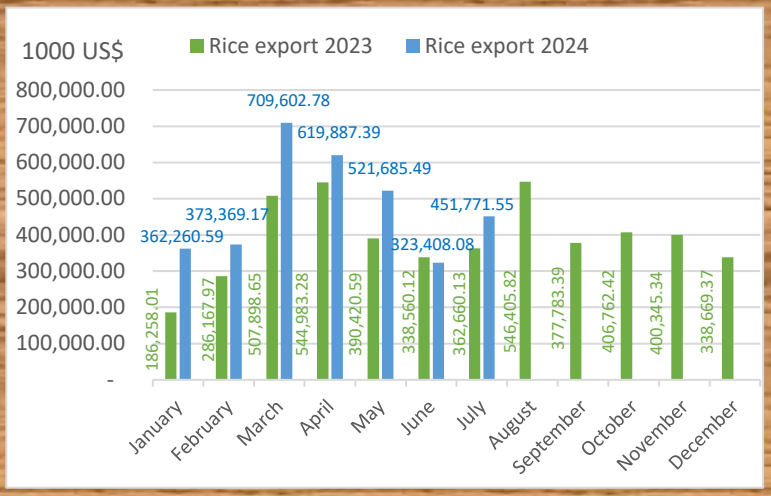


Figure 65: Monthly value of rice export in 2023 – 2024

Crop Situation in 2025 (P.2/4)

For Maize and soybean in 2024, the planted areas of maize and soybean in 2024 are estimated to decrease slightly compared to 2023 due to the influence of typhoon Yagi in the first half of September. Prices of imported fertilizer in the first 8 months of 2024 dropped by 4.8% compared to the same period in 2023. As a result, production costs of some agricultural commodities including maize and soybean decreased. Imports of corn and soybean in the first 8 months of 2024 increased in volume but decreased in value. In which, the import volume of maize was 6.24 million tons, up 16.7%; the import value reached 1.55 billion USD, down 9.5%. Soybean import volume was 1.5 million tons, up 10.1%; import value was 786 million USD, down 10.3%. (Figure 66 – 69)

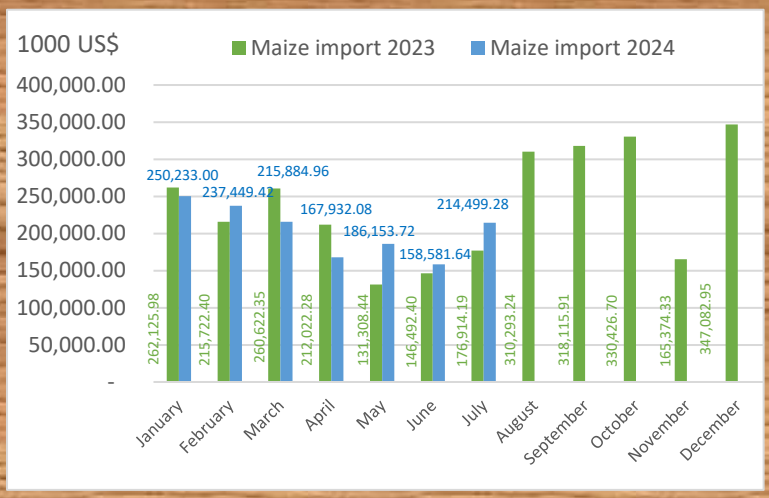


Figure 66: Monthly value of maize import in 2023 – 2024

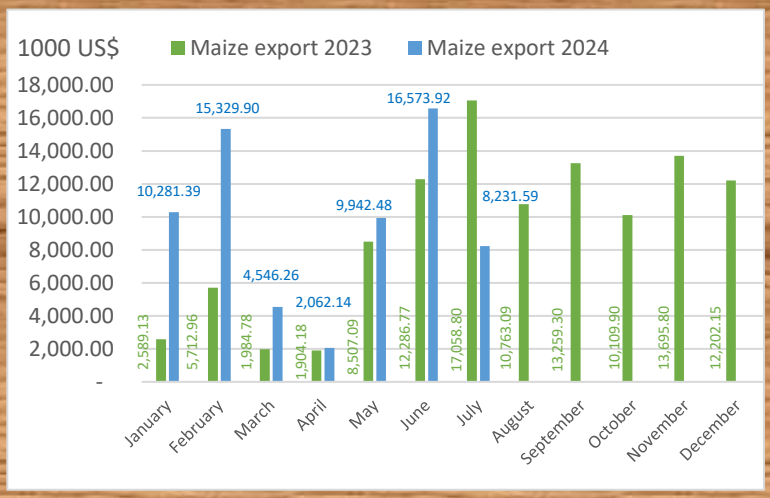


Figure 67: Monthly value of maize export in 2023 – 2024

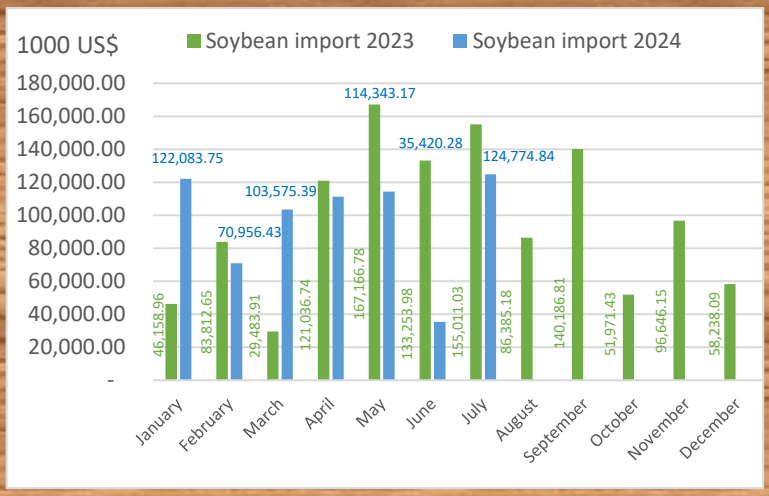


Figure 68: Monthly value of soybean import in 2023 – 2024

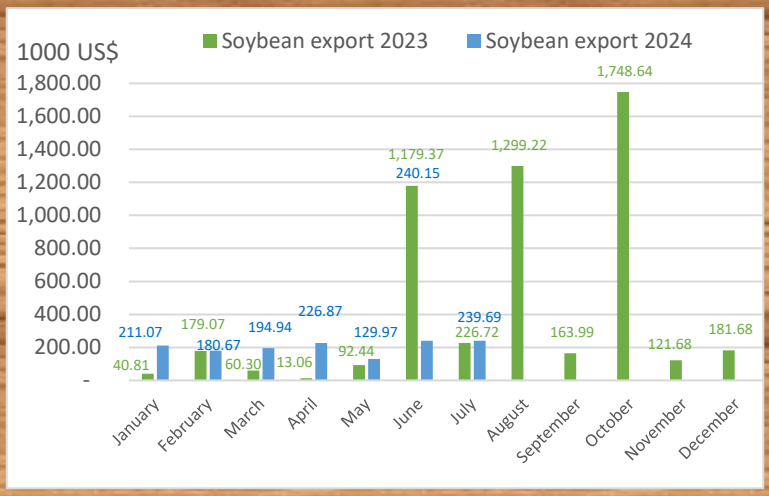


Figure 69: Monthly value of soybean export in 2023 – 2024

Crop Situation in 2025 (P.3/4)

For Sugarcane in 2024, according to the Vietnam Sugarcane Association, the Vietnamese sugar industry has ended the 2023/24 season in July 2024. Total sugarcane production of the season is estimated at nearly 11 million tons, up 113%, and sugar production is estimated at 1.15 million tons, up 122% over the same period last year. In the first 7 months of 2024, the export value of Vietnam's sugar is projected to increase considerably by 41.8% compared to the same period of 2023, thanks to high export values in China, Indonesia and Russia markets. Similar, the value of sugar import of Vietnam in the first 7 months of 2024 is estimated to rise by 6.3%, mainly as a result of increases in imports from China, Thailand, and Myanmar (Figure 70 – 71).

Figure 70: Monthly value of sugar import in 2023 – 2024

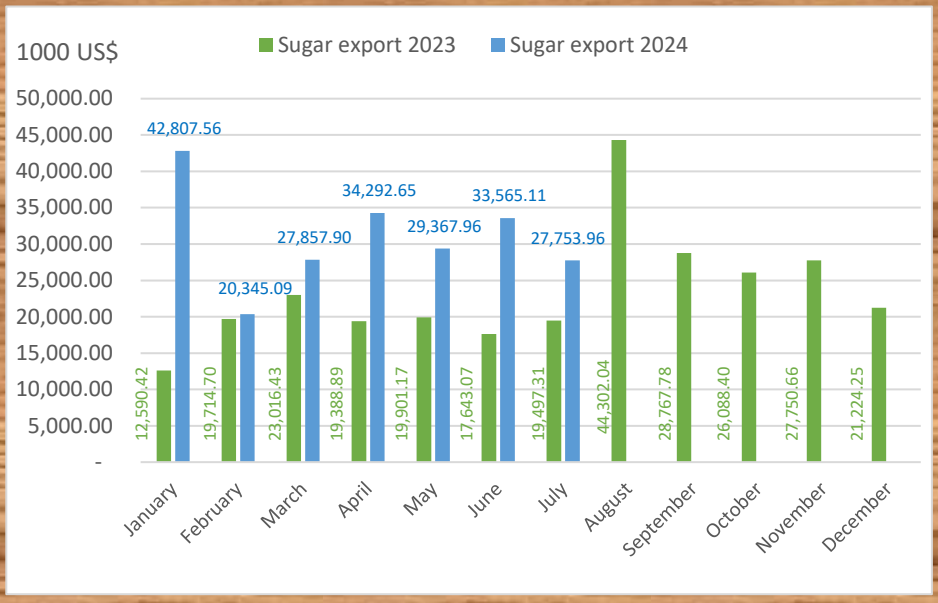


Figure 71: Monthly value of sugar export in 2023 – 2024

Crop Situation in 2025 (P.4/4)

Cassava in Vietnam on 2024, according to the Vietnam Cassava Association, the amount of cassava chips stored by businesses in the 2023-2024 crop is low, possibly due to high input prices, lack of demand, and low output prices, leading to businesses' fear of risk and reducing inventory levels. In the first 7 months of 2024, the export value of Vietnam's cassava is estimated to increase by 7.5% compared to the same period of 2023, mostly due to an increase in cassava exports to China. Meanwhile, Vietnam's import value of cassava during the first 7 months of 2024 is estimated to increase significantly by 118.1%, mostly as a result of a rise in cassava import from Laos (Figure 72 – 73).

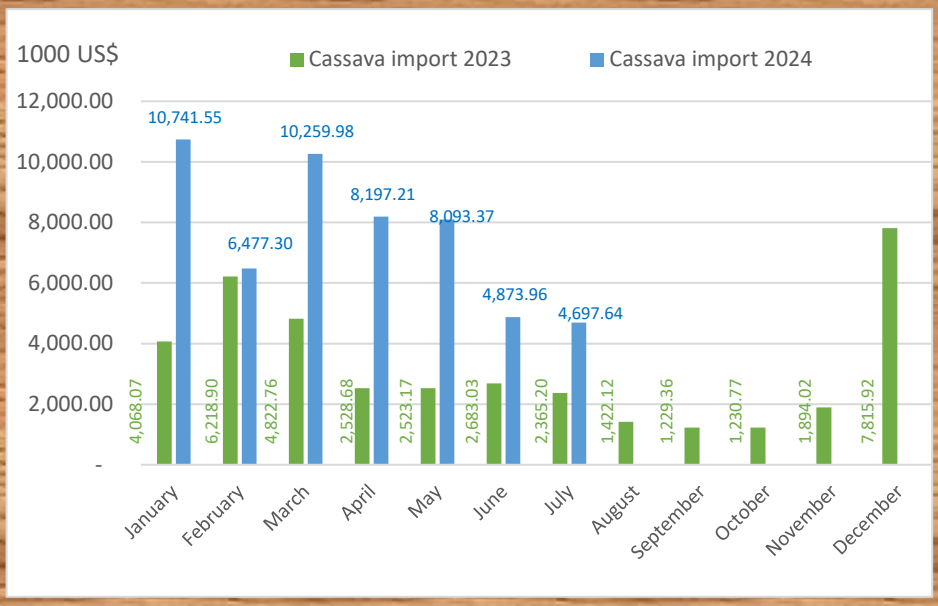


Figure 72: Monthly value of cassava import in 2023 – 2024

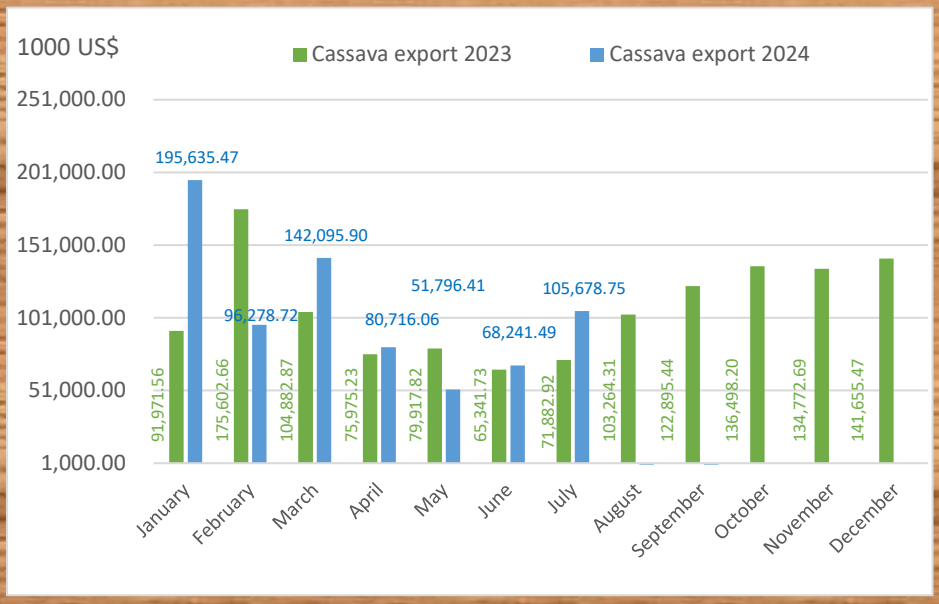


Figure 73: Monthly value of cassava export in 2023 – 2024