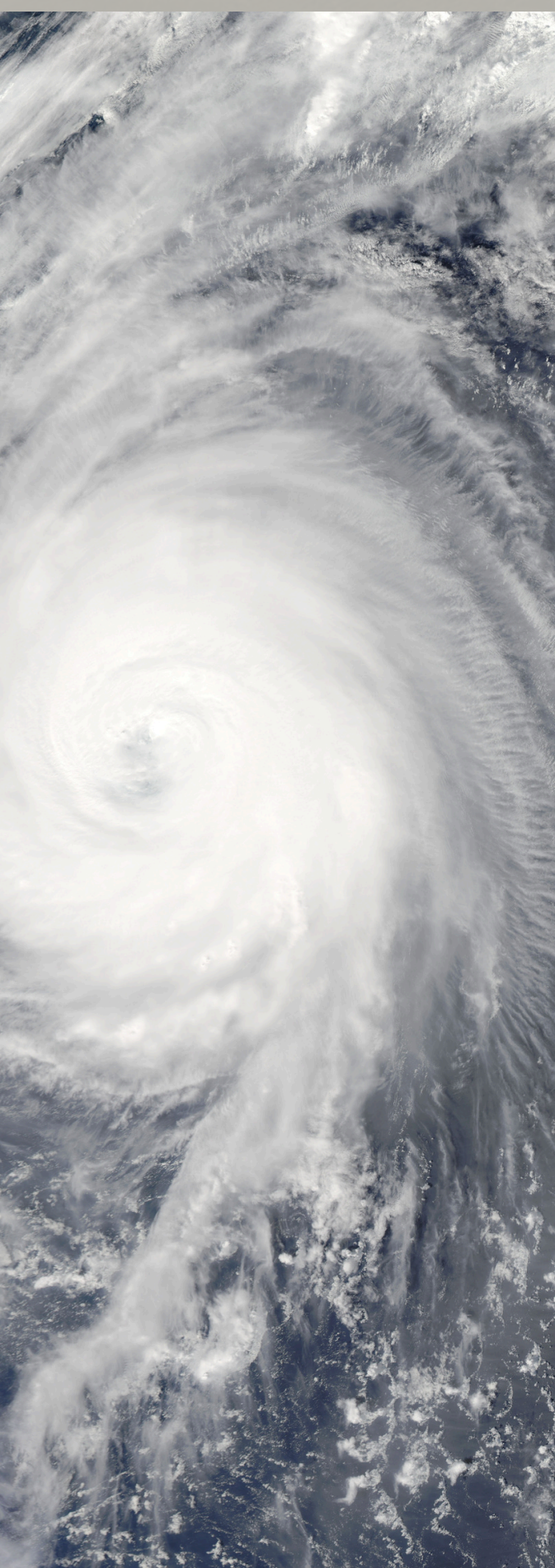


ASEAN EARLY WARNING INFORMATION

Crop Situation

EWI No. 35 | September 2025



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Crop Situation of Brunei Darussalam in Crop Year 2024/2025

Brunei Darussalam Situation in crop year 2024/2025

Brunei Darussalam is expected to experience favorable weather conditions for crop year 2024/2025, with sufficient water supply due to appropriate rainfall and the use of irrigation systems. The rainfall in this country amounts ranging over 151 mm per day, which could potentially be impacted by extreme rainfall events. Temperatures are expected to remain suitable for crop growth, ranging between 25–35°C, with adequate sunlight throughout the season.

However, climate change situation is reported to have affected the agricultural crops, particularly rice during the main crop season of 2024/2025. Rainfall was below normal during the wet season, while excessive rainfall occurred during the harvest period, which negatively impacted yields. In addition, pest infestations such as brown planthopper (BPH), leaf folders, and stem borers have also affected rice production.

Nevertheless, the government and farmers are collaborating to address these challenges. Farmers will adapt their agricultural practices by mitigating risks and damage from natural disasters, such as adjusting cultivation plans, altering planting schedules, and using improved plant varieties. The government has implemented various policies to support these efforts, including providing farmers with new technologies, improving irrigation and drainage systems, and ensuring market access for farmers.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is expected to increase, influenced by more available areas for rice farming. However, rice production is expected to decrease due to unfavorable weather conditions, such as excessive rainfall and flooding, including flash floods in certain areas and flooding during harvest time. For the rice harvest period, the wet season harvest took place from January to April 2025, while the dry season harvest began from July to October 2025. Regarding rice trade, rice imports are forecast to increase, which indicates a gradual rise in imports throughout the year (Figure 1).

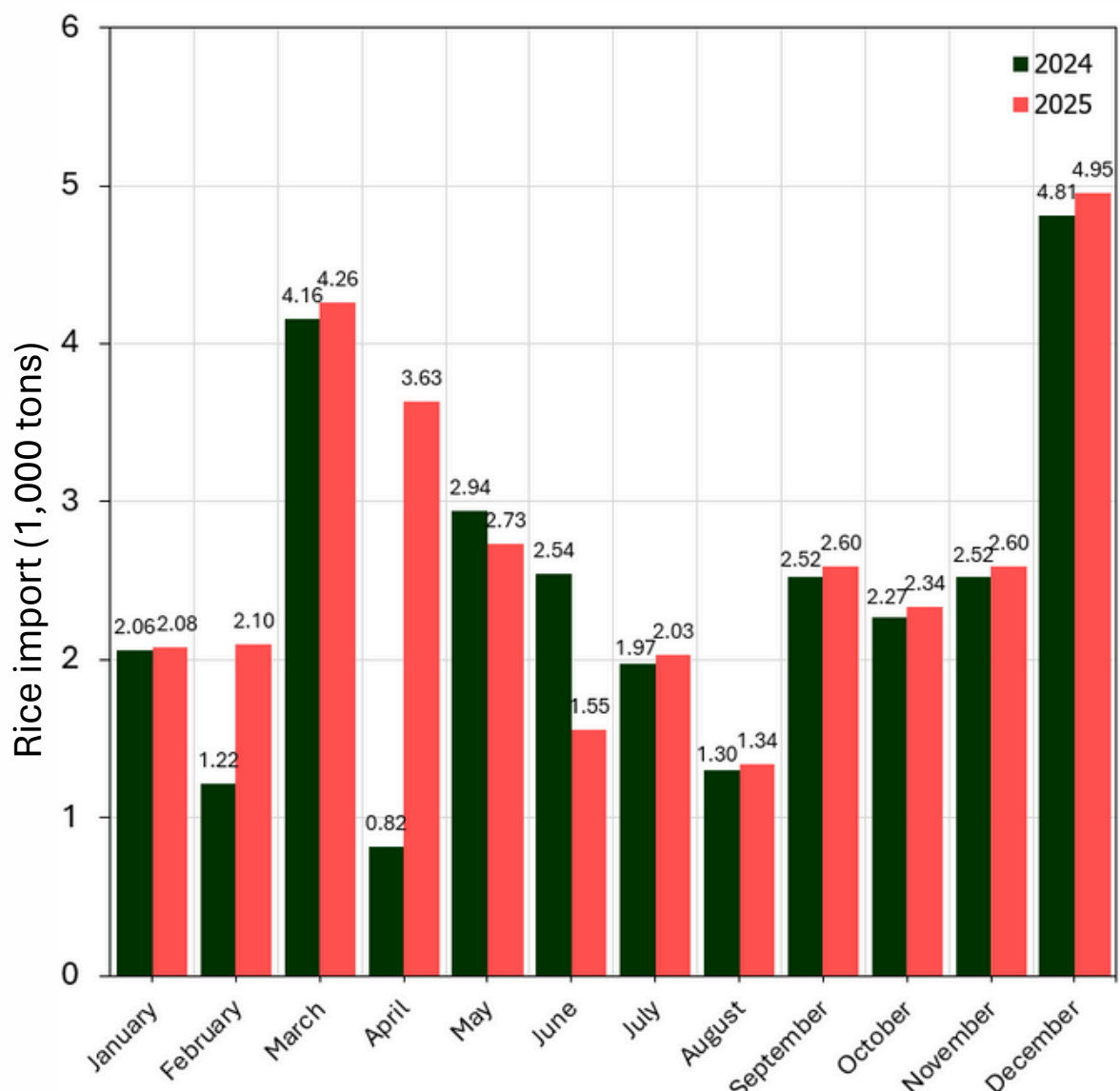


Figure 1: Monthly quantity of rice import from 2024 to 2025 (forecast)

For maize crops in crop year 2024/2025, the planted area is expected to increase due to farmers responding to rising maize prices and favorable weather conditions. Additionally, the maize production is also expected to increase, driven by favorable weather conditions, improved crop management practices, increased fertilizer use, crop rotation plans, expansion of maize cultivation areas, and high consumer demand. The maize harvest period will be continuous planting and harvesting throughout the year. Regarding maize trade, maize imports are forecast to increase (Figure 2).

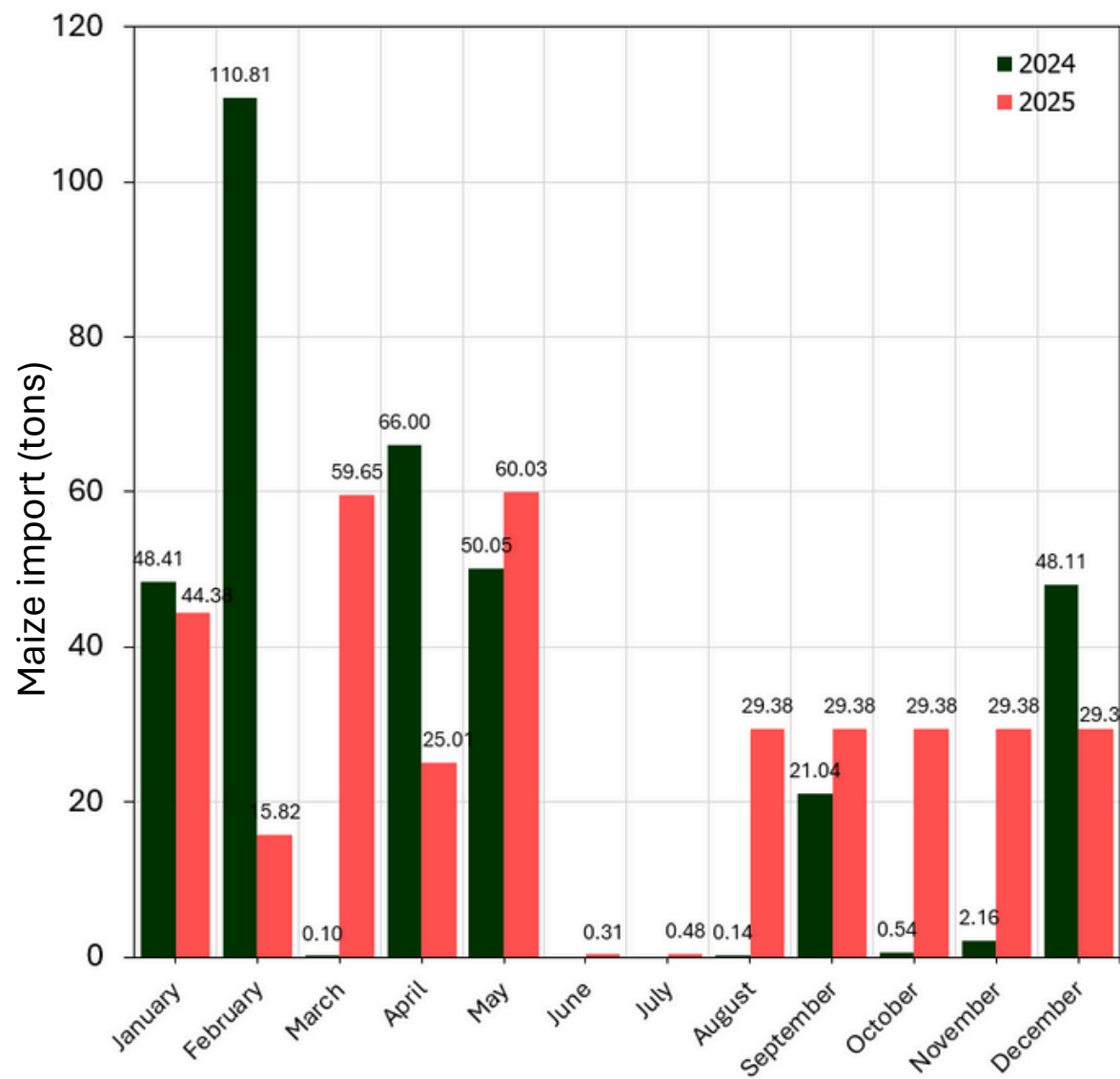


Figure 2: Monthly quantity of maize import from 2024 to 2025 (forecast)

For sugarcane crops in crop year 2024/2025, the planted area is expected to increase due to rising sugar prices and favorable weather conditions. The sugarcane production is expected to increase, driven by favorable weather conditions, better crop management practices, increased fertilizer application, and the use of high-quality sugarcane varieties. The sugarcane harvest period will be continuous planting and harvesting throughout the year. Regarding sugar trade, sugar imports are forecast to increase, with imports fluctuating around mid-year, peaking in June at 1,730.40 tons, while imports in other months remain steady at approximately 865.25 tons (Figure 3).

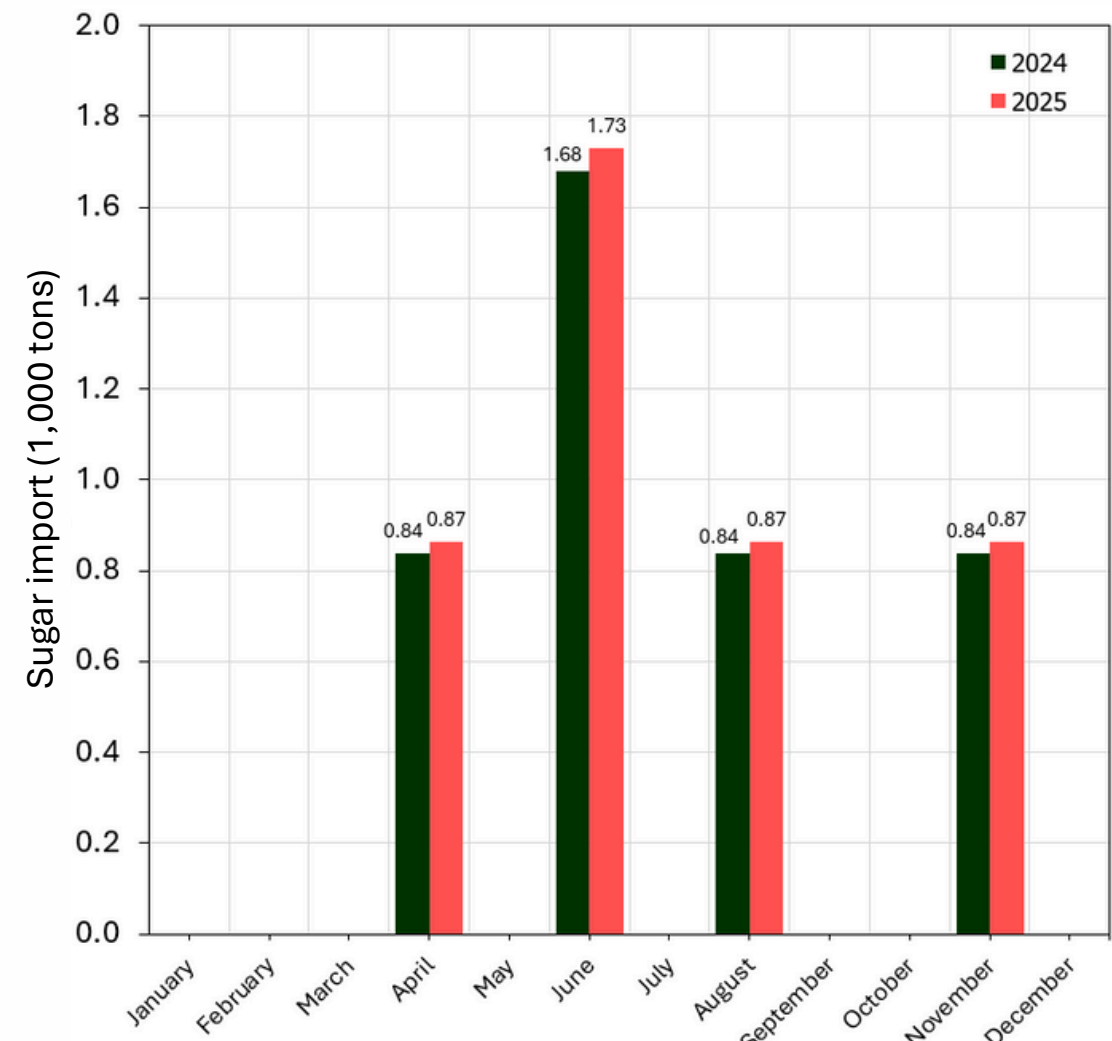


Figure 3: Monthly quantity of sugar import from 2024 to 2025 (forecast)

For soybean production in crop year 2024/2025, Brunei Darussalam have no soybean plantation. Soybean imports are expected to increase, as shown in the graph, with fluctuations throughout the year (Figure 4).

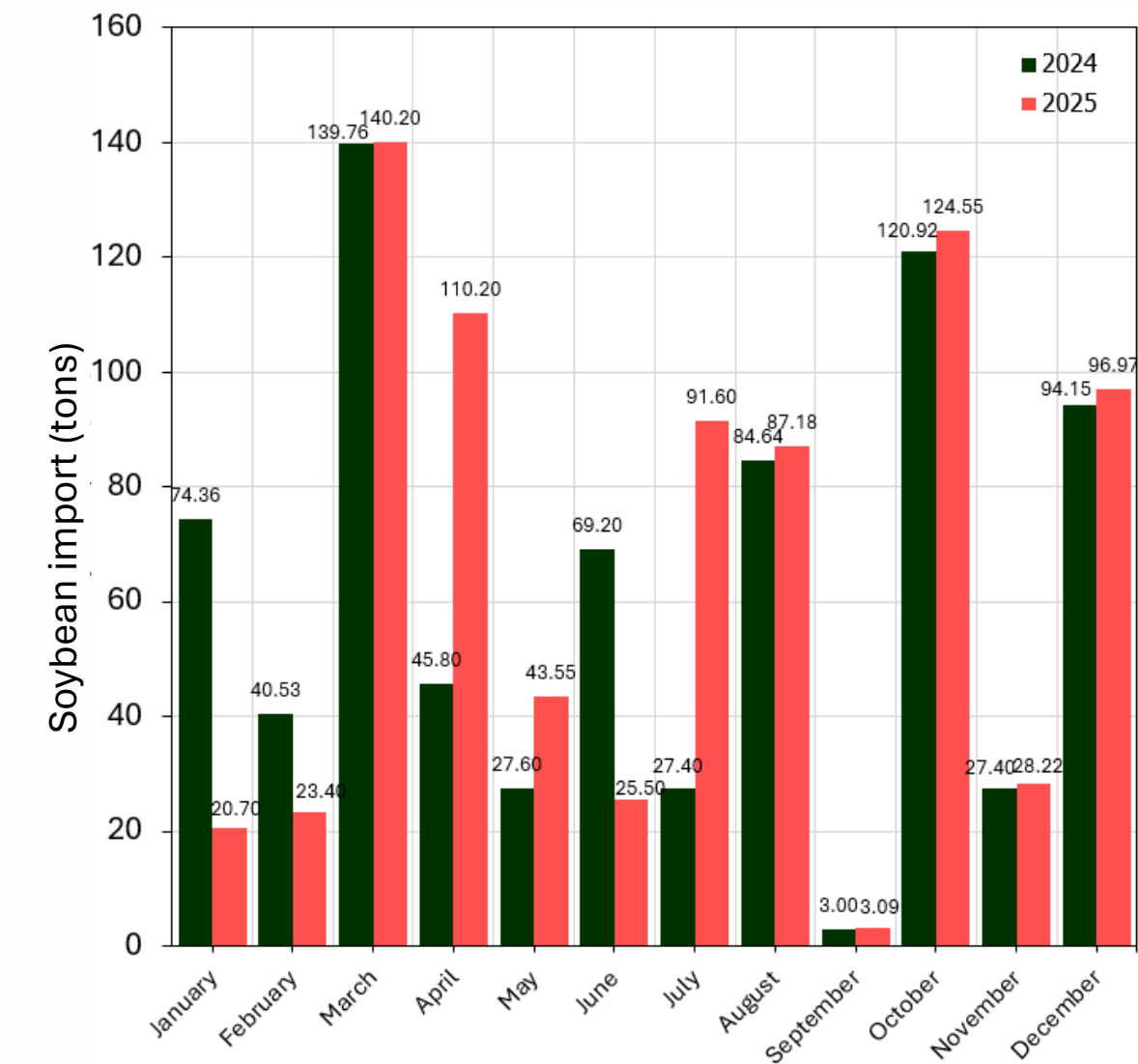


Figure 4: Monthly quantity of soybean import from 2024 to 2025 (forecast)

For cassava crops in crop year 2024/2025, the planted area is expected to increase as farmers will respond to rising cassava prices. The cassava production is expected to increase due to better crop management practices, the use of high-quality cassava varieties, and increasing demand for value-added and processed products such as crisps, fritters, and desserts. Additionally, farmers are expanding the area dedicated to cassava cultivation. The cassava harvest period will be continuous planting and harvesting throughout the year. Regarding cassava trade, cassava imports are forecast to increase. However, there are no reports on information on the cassava trade yet.

Crop Situation of Cambodia in Crop Year 2024/2025



Cambodia situation in crop year 2024/2025

Cambodia is expected to experience favorable weather conditions in crop year 2024/2025, with sufficient water supply from rainfall, irrigation, and adequate sunlight for plant growth. Rainfall is forecast to be moderate (20–50 mm per day). However, some areas may face unfavorable weather conditions, including insufficient rainfall, excessively high temperatures around 30°C that may be unsuitable for crop development, and prolonged cloudy weather. Additionally, the country may also experience the effects of climate change or global warming, such as extreme drought conditions (El Niño) and heavy rainfall causing floods (La Niña) throughout the year.

Natural disasters have already been reported with floods affecting Banteay Meanchey, Battambang, Kampong Thom, Thbong Khmom, Kratie, Preah Vihear, and Pursat. Droughts have impacted Banteay Meanchey, Battambang, Pursat, and Oddar Meanchey, while pest infestations have affected Prey Veng and Svay Rieng. Moreover, Cassava is the most affected crop, with an estimated 144,155 hectares damaged, followed by 41,993 hectares of rice and 144 hectares of maize.

Regarding mitigating risks and damages from these natural disasters, farmers are adapting by adjusting their cultivation plans, changing planting schedules, and using the high-quality of plant varieties. Additionally, the government has also implemented various policies to support farmers, such as promoting new technologies, increasing access to credit, providing markets for agricultural products, and supporting the development of Modern Agricultural Communities. Furthermore, both farmers and the government are cooperating on water resource management to minimize damage from natural disasters.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is expected to increase due to favorable weather conditions and supportive government policies in accordance with the motto of the Ministry of Agriculture, Forestry and Fisheries. However, disaster events such as floods, droughts, diseases, and pest infestations may lead to a reduction in production levels, although many farmers have planned to replant a second crop to compensate for the losses. Regarding rice trade, data indicated that during the first half of 2024, export volumes were high, reaching approximately 76,000–82,000 tons, before declining in the middle of the year. In the second half of 2024, rice exports recovered to around 70,000 tons (Figure 5). Information on the harvest period and rice imports is not yet available.

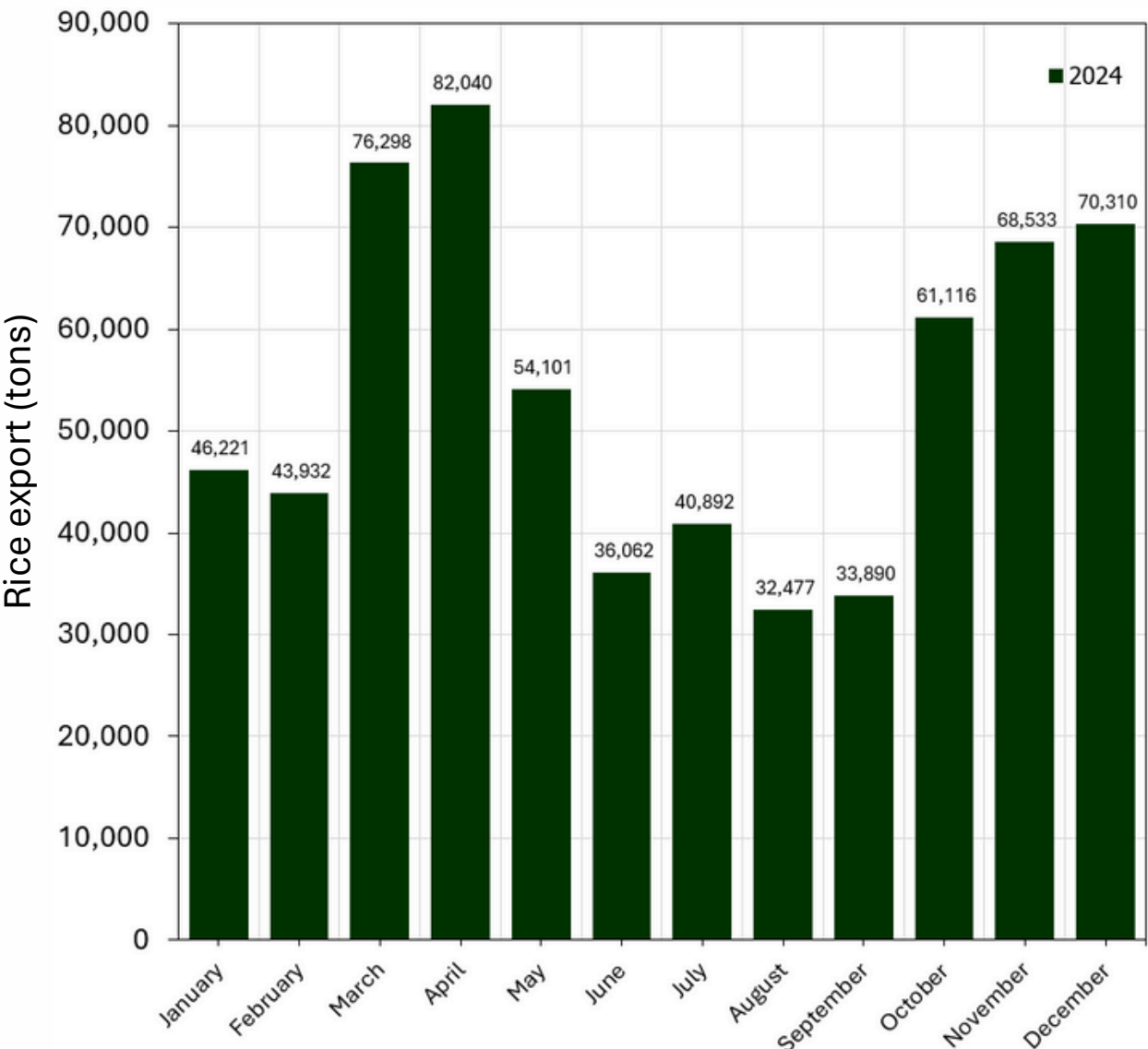


Figure 5: Monthly quantity of rice export in 2024

For maize crops in crop year 2024/2025, the planted area is expected to decrease due to rising prices of competing crops. Additionally, the maize production is also expected to decline due to natural disasters and unfavorable weather conditions, such as floods and droughts.

For sugarcane crops in crop year 2024/2025, the planted area is expected to increase due to rising sugar prices, declining prices of competing crops, favorable weather conditions, and supportive government policies. The improved crop managements and the use of high-quality sugarcane varieties have also contributed to increase production levels.

For soybean crops in crop year 2024/2025, the planted area is expected to increase due to rising soybean prices, declining prices of competing crops, and supportive government policies. Improved crop managements have also contributed to increase production levels.

For cassava crops in crop year 2024/2025, the planted area is expected to increase as farmers respond to declining prices of competing crops and supportive government policies. Natural disasters have contributed to decrease production levels. However, the improved crop managements and the use of high-quality cassava varieties could also recovery to higher production levels.

Note:
According to the information received from the ASEAN Member State, particularly Cambodia, data on the harvest seasons of crops, including maize, sugarcane, soybean, and cassava, as well as trade information such as imports and exports, are not yet available. Further updates related to this country report will be provided in the next ASEAN Commodity Outlook (ACO) Report No. 35 (December edition).

Crop Situation of Indonesia in Crop Year 2024/2025



Indonesia situation in crop year 2024/2025

Indonesia is expected to be favorable for growing crops in crop year 2024/2025 with sufficient water availability to meet commodity needs. This includes in variance rainfall, ranging from low (0.5–20 mm per day), moderate (20–50 mm per day), heavy rainfall (50–100 mm per day), and very heavy rainfall (100–150 mm per day), and water supply supplemented by irrigation. The temperature is expected to remain within a range conducive to crop growth, and plants will receive adequate sunlight for growth. Regarding the impact of climate change or global warming, Indonesian authorities have reported that no significant effects are expected on commodity crops. However, some regions may experience the impacts of climate change, such as extreme rainfall (La Niña) during the year.

Additionally, several disasters affect various regions, including flooding in Aceh, North Sumatera, Riau, Jambi, South Sumatra, Lampung, West Java, Central Java, East Java, West Kalimantan, South Kalimantan, and South Sulawesi, as well as droughts in Jambi, Central Java, and East Java. Diseases and pest infestations affect areas such as Jambi, South Sumatra, Central Java, DI Yogyakarta, Bali, West Kalimantan, South Sulawesi, and Southeast Sulawesi.

The impacts of climate change or global warming have resulted in significant agricultural losses across major crops. Rice that is a staple food was the most damaged with approximately 65,896 hectares damaged. Maize losses were reported around 1,951 hectares, and soybean was around 137 hectares damaged. Meanwhile, there have been no reported impacts on sugarcane and cassava related to this situation.

Nevertheless, farmers will adapt to these risks by adjusting their cultivation plans or planting schedules to suit changes in weather patterns and by using plant varieties that are resistant to climate change. Despite this, some areas are still experiencing damage due to climate change or global warming. Farmers and the government are working together on water management to effectively reduce damage from natural disasters.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area and production are expected to increase. The increase in planted area is due to rising rice prices, favorable weather conditions, government policies, and attributing to rice, which is a staple food for the Indonesian population. The increase in rice production is attributed to favorable weather conditions, better crop management practices, and the use of high-quality rice varieties. The harvest period for the wet season crops is from January to June, while the dry season crops will be harvested from July to December. Regarding rice trade in 2024, import volumes increased early in the year, peaking at 552,799 tons in March, before steadily declining to a low of 140,183 tons in September. Imports then increased again toward December. However, in early 2025, import volumes drop sharply by 82.61 percent compared to the same period in 2024. Rice exports remained relatively low throughout the year, ranging from 0.44 to 19.34 tons, but a significant peak occurred in April at 425 tons (Figures 6–7).

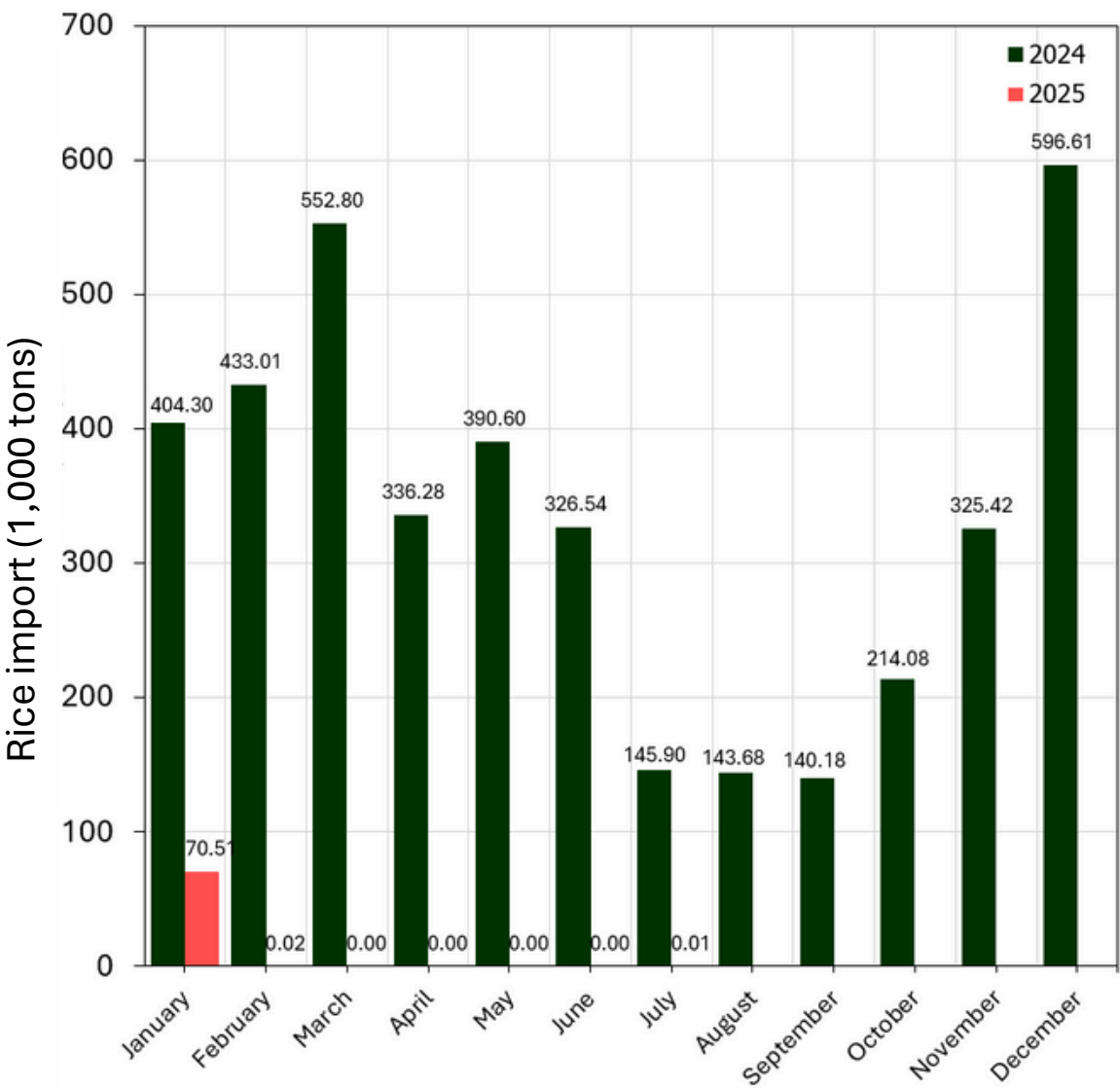


Figure 6: Monthly quantity of rice import from 2024 to 2025. Note for small import volumes in 2025 are approximately 21.14, 0.08, 0.32, 0.97, 0.66, and 6.26 thousand tons in February, March, April, May, June, and July, respectively.

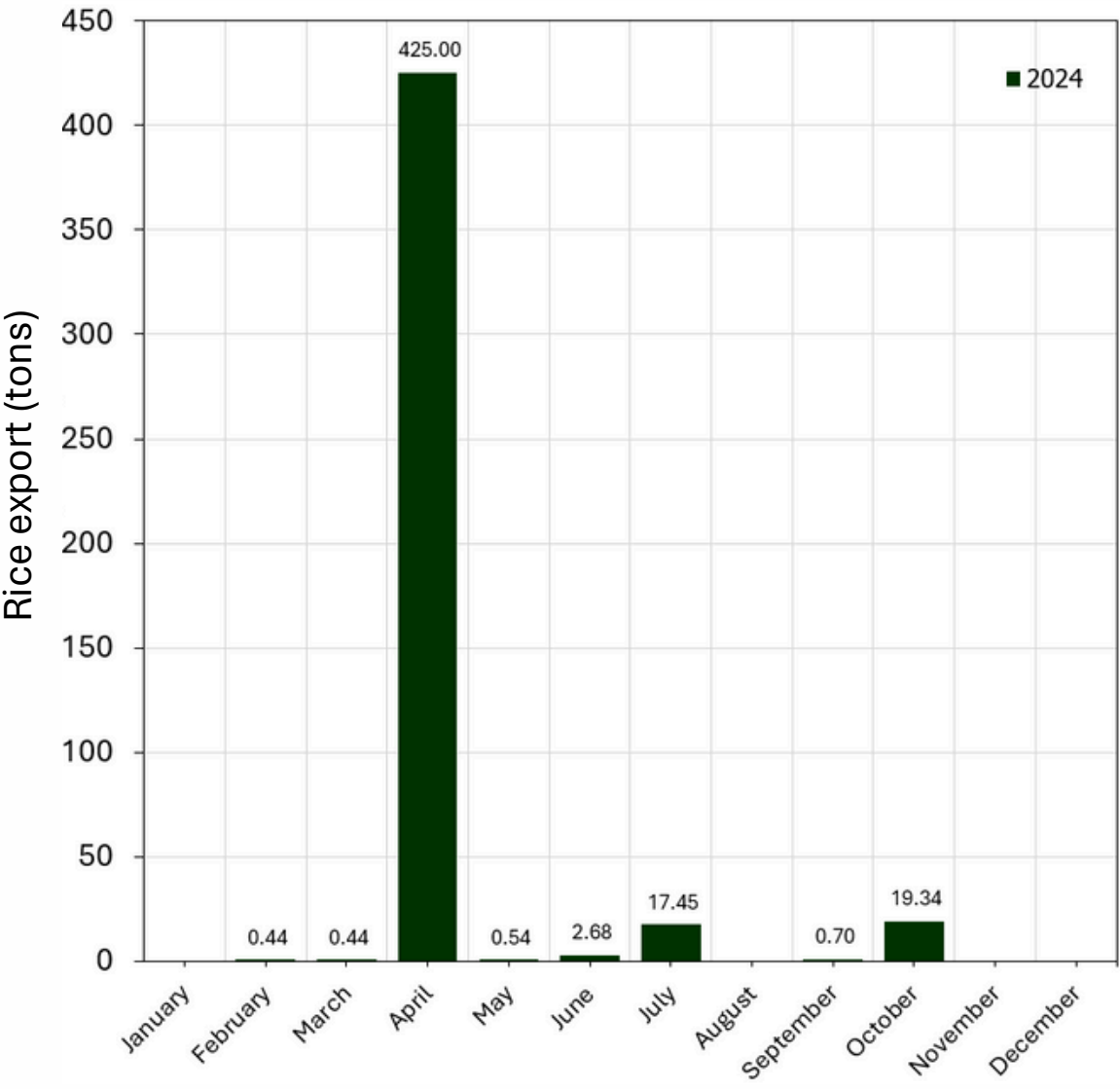


Figure 7: Monthly quantity of rice export in 2024

For maize crops in crop year 2024/2025, the planted area is expected to decrease due to falling maize prices, the government’s rice self-sufficiency acceleration policy, and competition with other food and horticultural crops. However, the production is expected to increase due to favorable weather conditions, better crop management practices, and the use of high-quality maize varieties. The harvest period will cover three cropping seasons. The first crop covered from January to April, the second crop covered from May to August, and the third crop has covered from September to December. Regarding maize trade in 2024, imports increased early in the year, then dropped to 20,157 tons in June before rising again in the second half of 2024. This trend is expected to result in a slight increase in imports into 2025, with a reduction expected in the second half of 2025 (Figure 8). Maize exports remained low but peaked significantly in mid-2024, reaching 40,901.65 tons in July and 14,082.09 tons in August (Figure 9). In the first half of 2025, maize exports ranged between 606.13 and 155,000.73 tons.

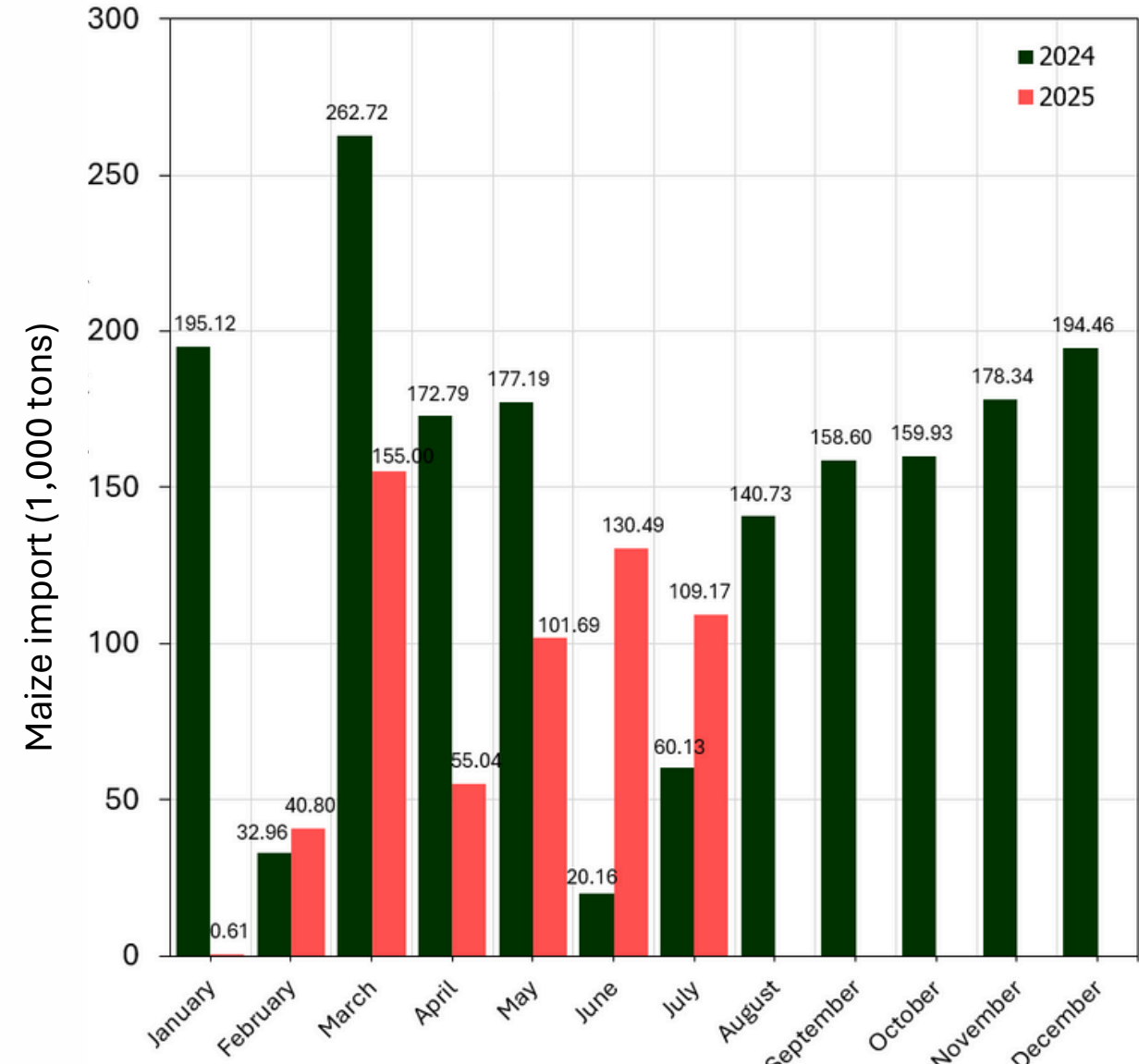


Figure 8: Monthly quantity of maize import from 2024 to 2025

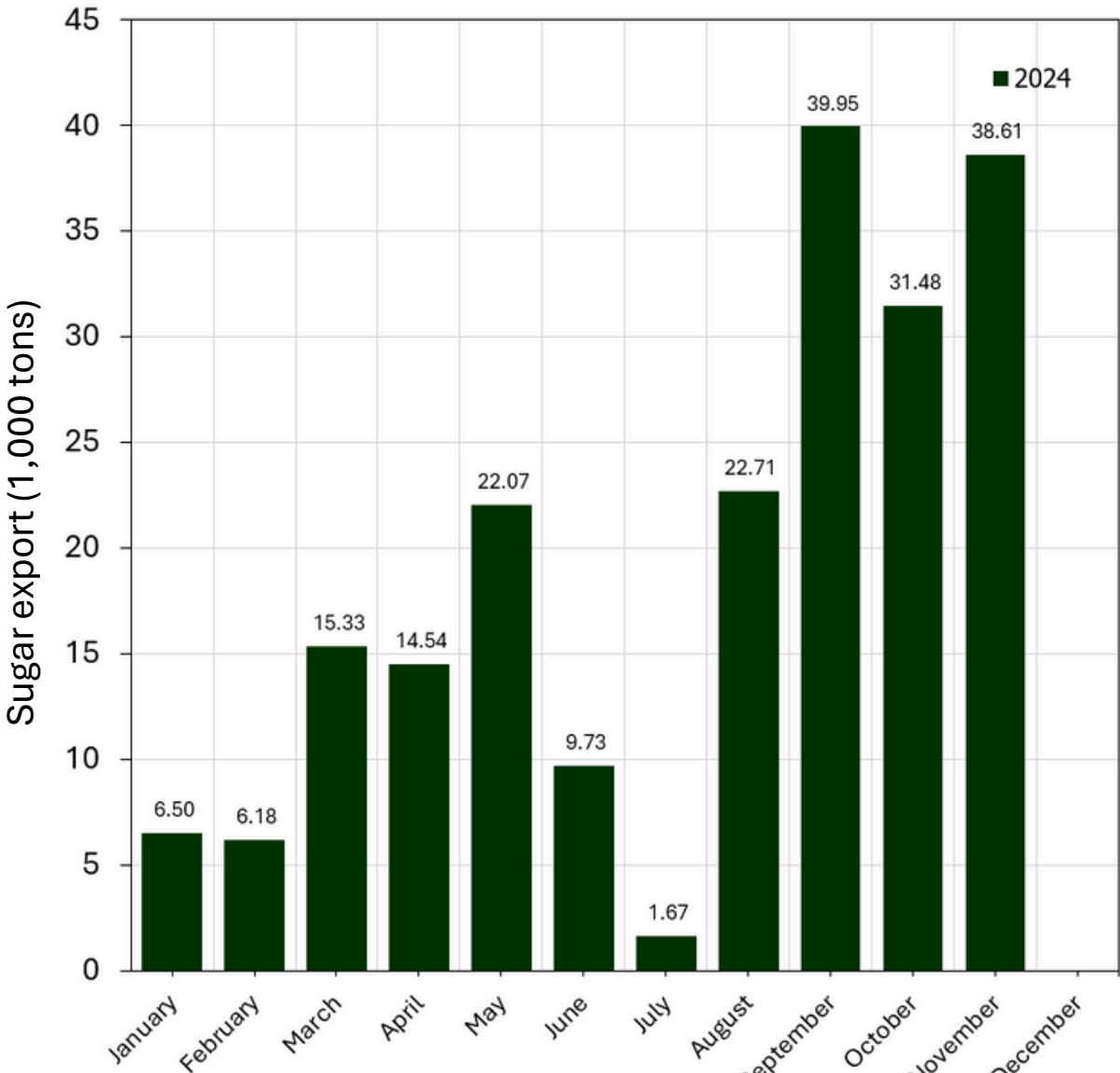


Figure 11: Monthly quantity of sugar export in 2024

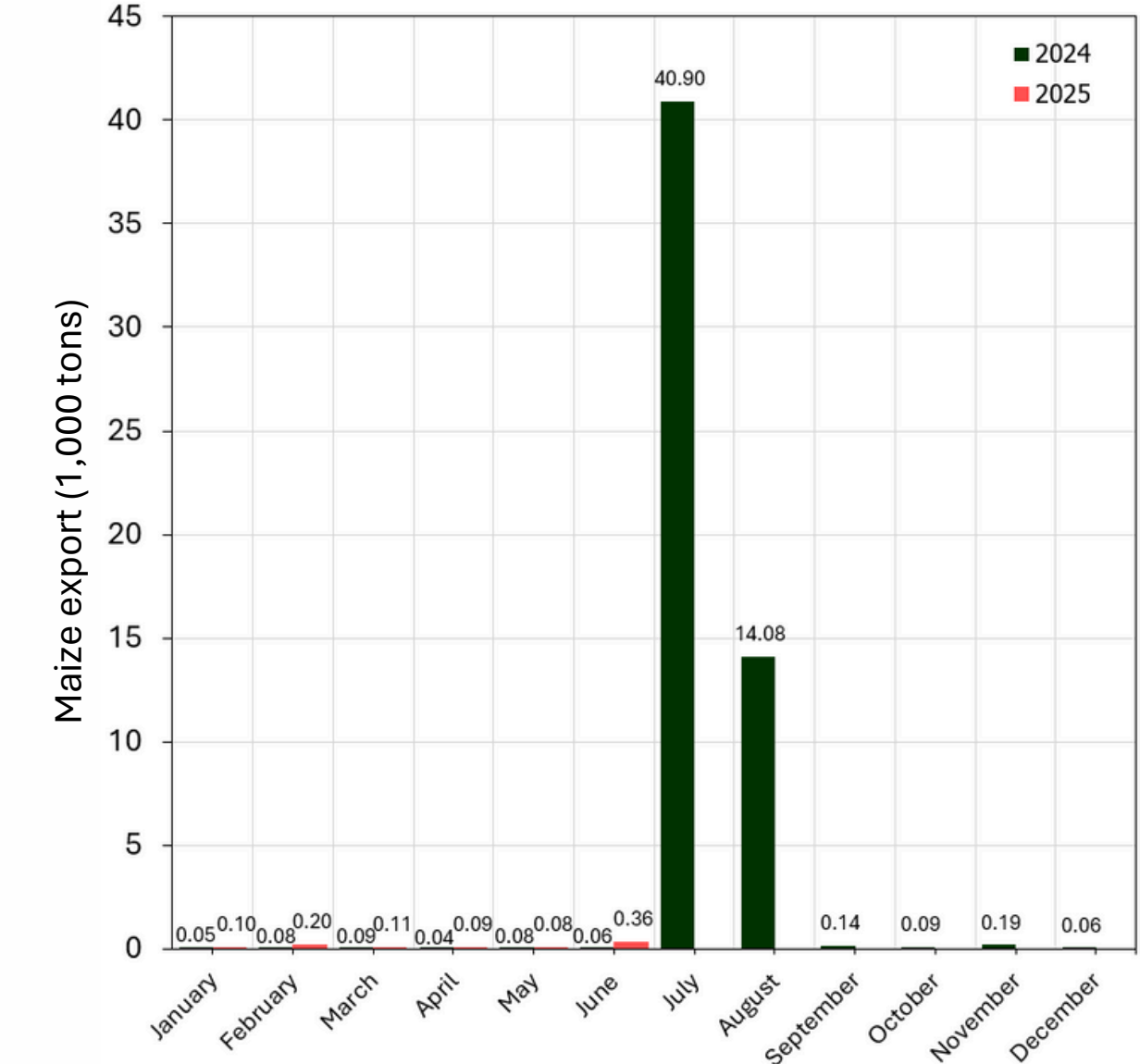


Figure 9: Monthly quantity of maize export from 2024 to 2025

For sugarcane crops in crop year 2024/2025, both the planted area and production are expected to increase. The rising in the planted area is due to favorable weather conditions and supportive government policies. Improved crop management practices are also contributing to higher production levels. The harvest period is expected to cover from January to November. Regarding sugar trade in 2024, imports showed two significant peaks in April (647,503 tons) and November (645,002 tons) and this trend is expected to continue in 2025 (Figure 10). Exports grew steadily during the first half of 2024, and they are expected to rise again in the latter half of the year (Figure 11).

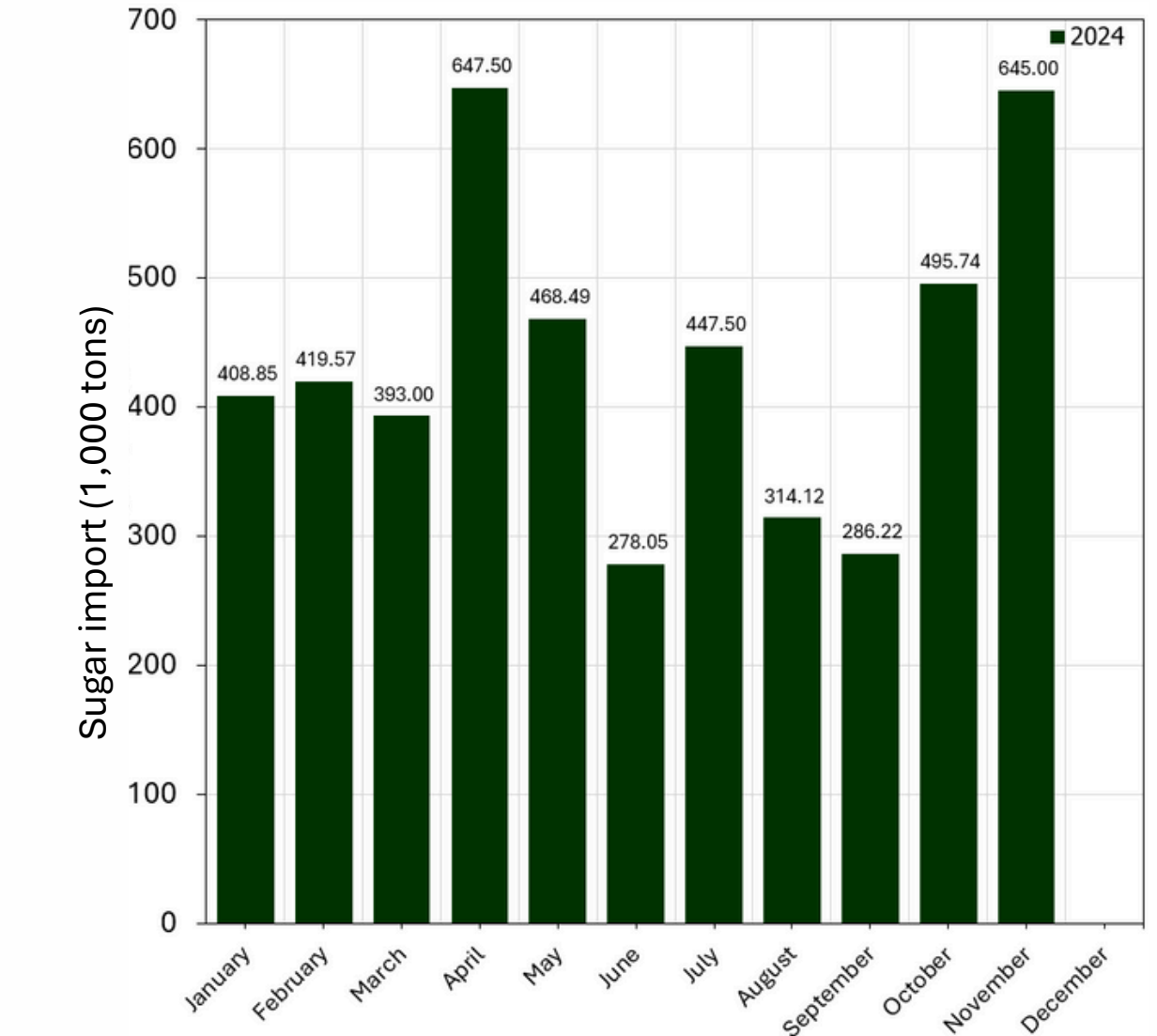


Figure 10: Monthly quantity of sugar import in 2024

For soybean crops in crop year 2024/2025, both the planted area and production are predicted to decrease. The decrease in the planted area is due to falling soybean prices, the government’s rice self-sufficiency acceleration policy, and competition with other food and horticultural crops. Unfavorable weather conditions have also contributed to lower production levels. The harvest period will cover three cropping seasons. The first crop covered from January to April, the second crop covered from May to August, and the third crop has covered from September to December. Regarding soybean trade, imports increased during mid-2024 but slightly declined toward the end of the year, while in the first half of 2025, import volumes decreased compared to the same period in 2024 (Figure 12). Soybean exports fluctuated throughout 2024. Meanwhile, the highest volume in May 2025 reached approximately 4,600 tons (Figure 13).

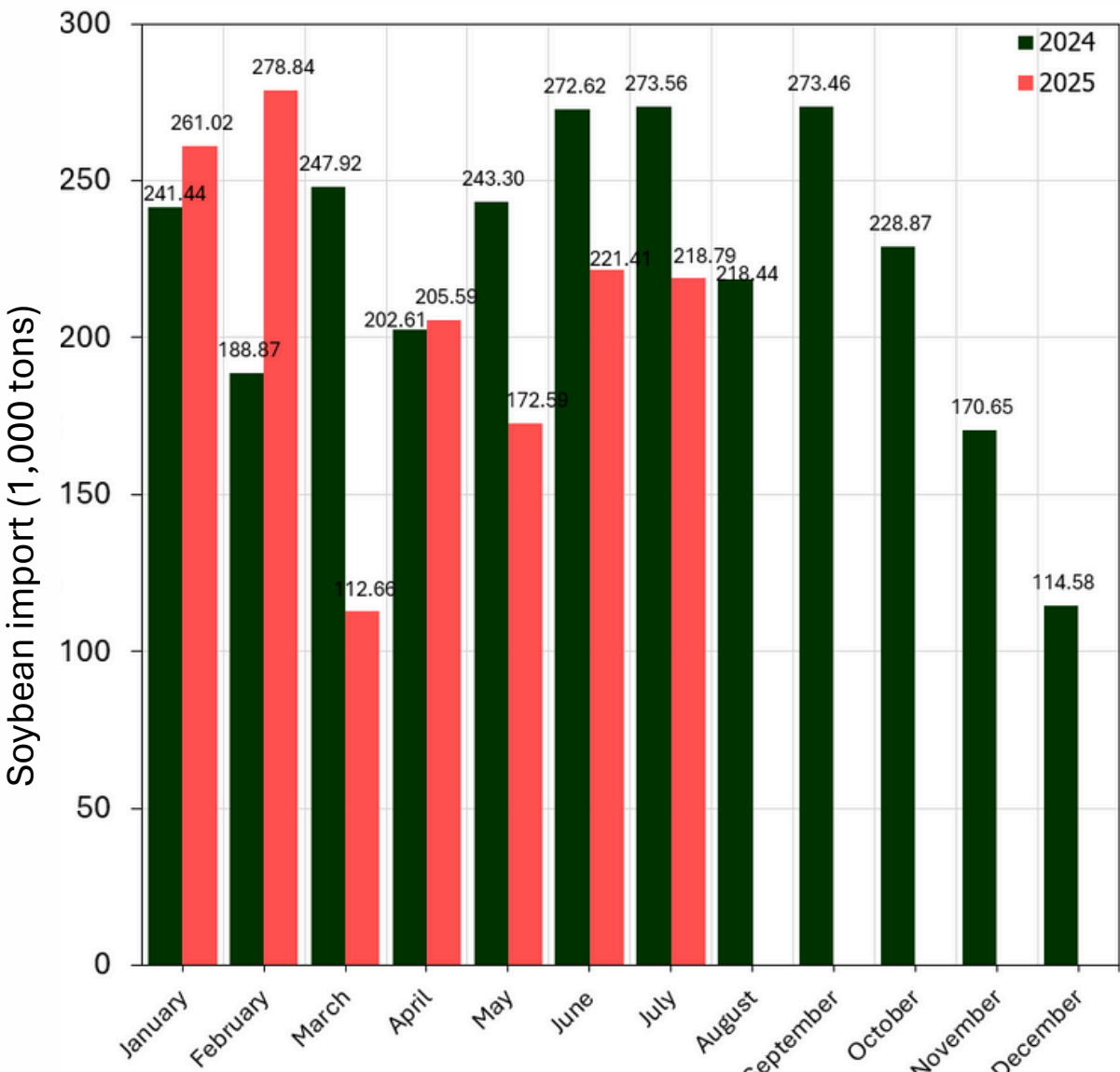


Figure 12: Monthly quantity of soybean import from 2024 to 2025

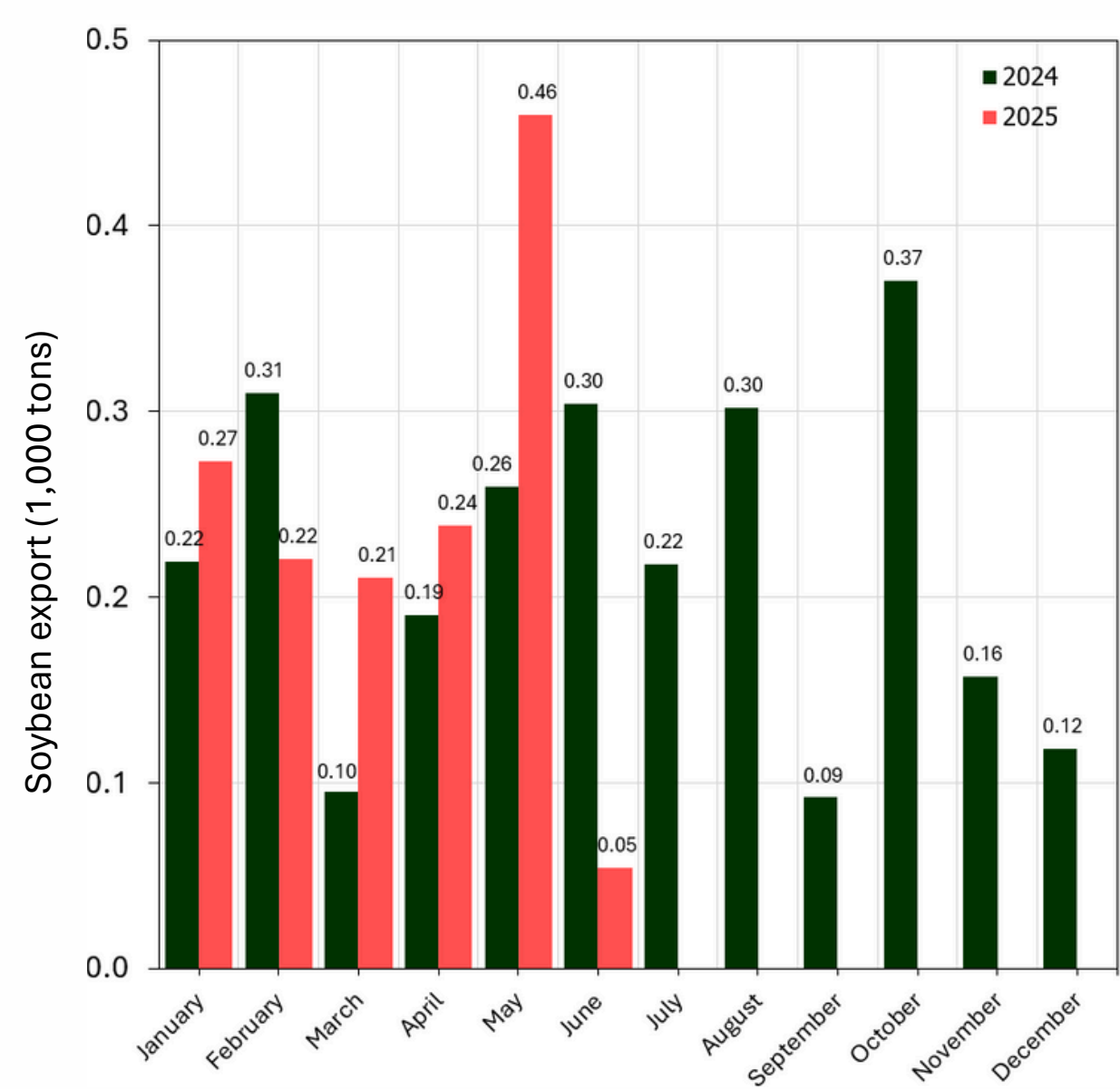


Figure 13: Monthly quantity of soybean export from 2024 to 2025

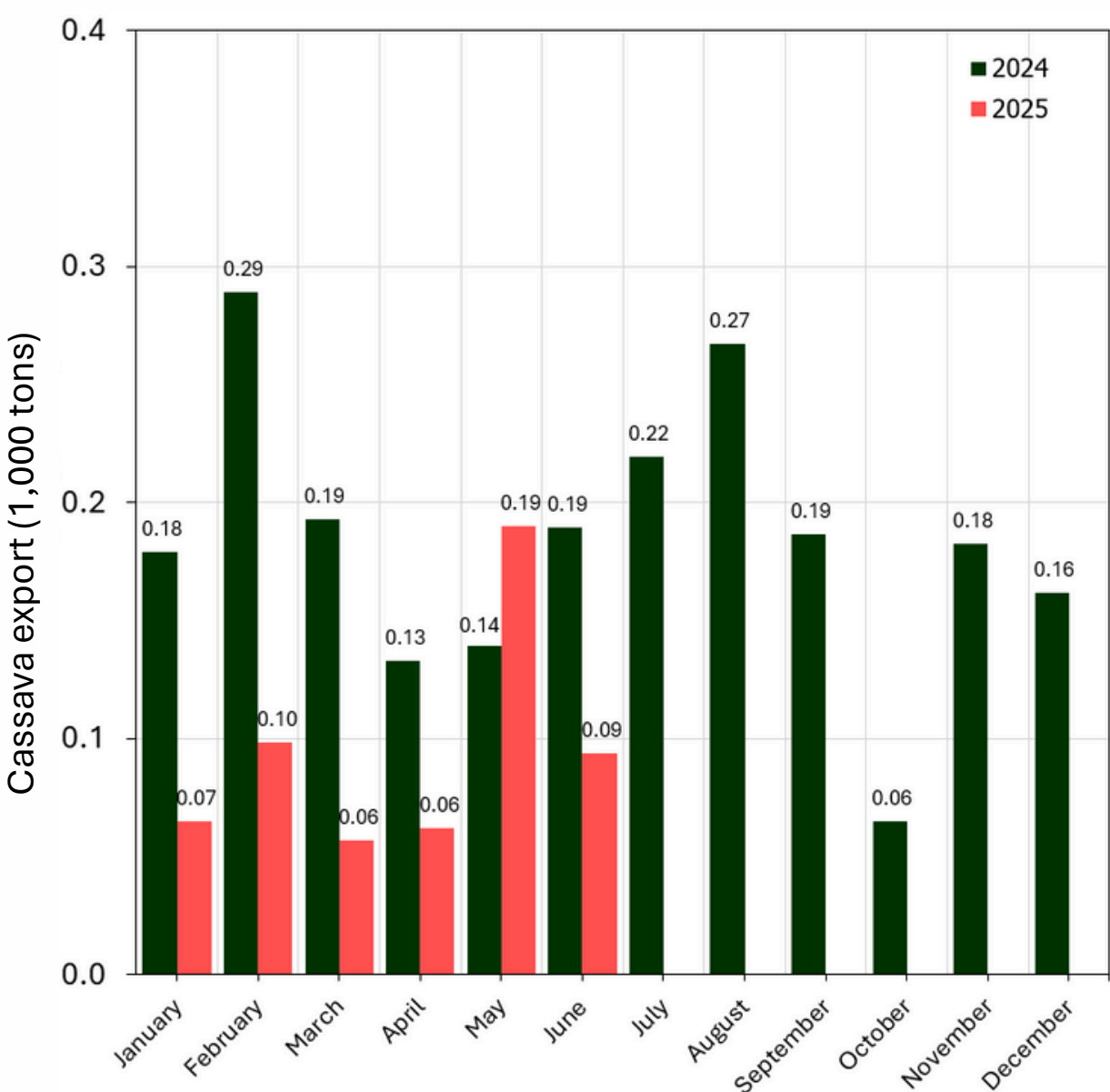


Figure 15: Monthly quantity of cassava export from 2024 to 2025

For cassava crops in crop year 2024/2025, both the planted area and production are expected to decrease. The decrease in planted area is due to falling cassava prices, rising prices of competing crops, and competition from other food and horticultural crops. Unfavorable weather conditions have also contributed to lower production levels. The harvest period will cover three cropping seasons. The first crop covered from January to April, the second crop covered from May to August, and the third crop has covered from September to December. Regarding cassava trade, import volumes were high during the first half of 2024, reaching approximately 64,000–65,000 tons, before declining toward the end of the year. In the first half of 2025, import volumes followed a similar trend but were smaller compared to the same period in 2024 (Figure 14). Export trends showed two significant peaks in 2024, which indicated in February (289.28 tons) and August (267.22 tons). In 2025, exports were generally lower during the first half of the year but showed a notable increase in May, reaching 190.29 tons (Figure 15).

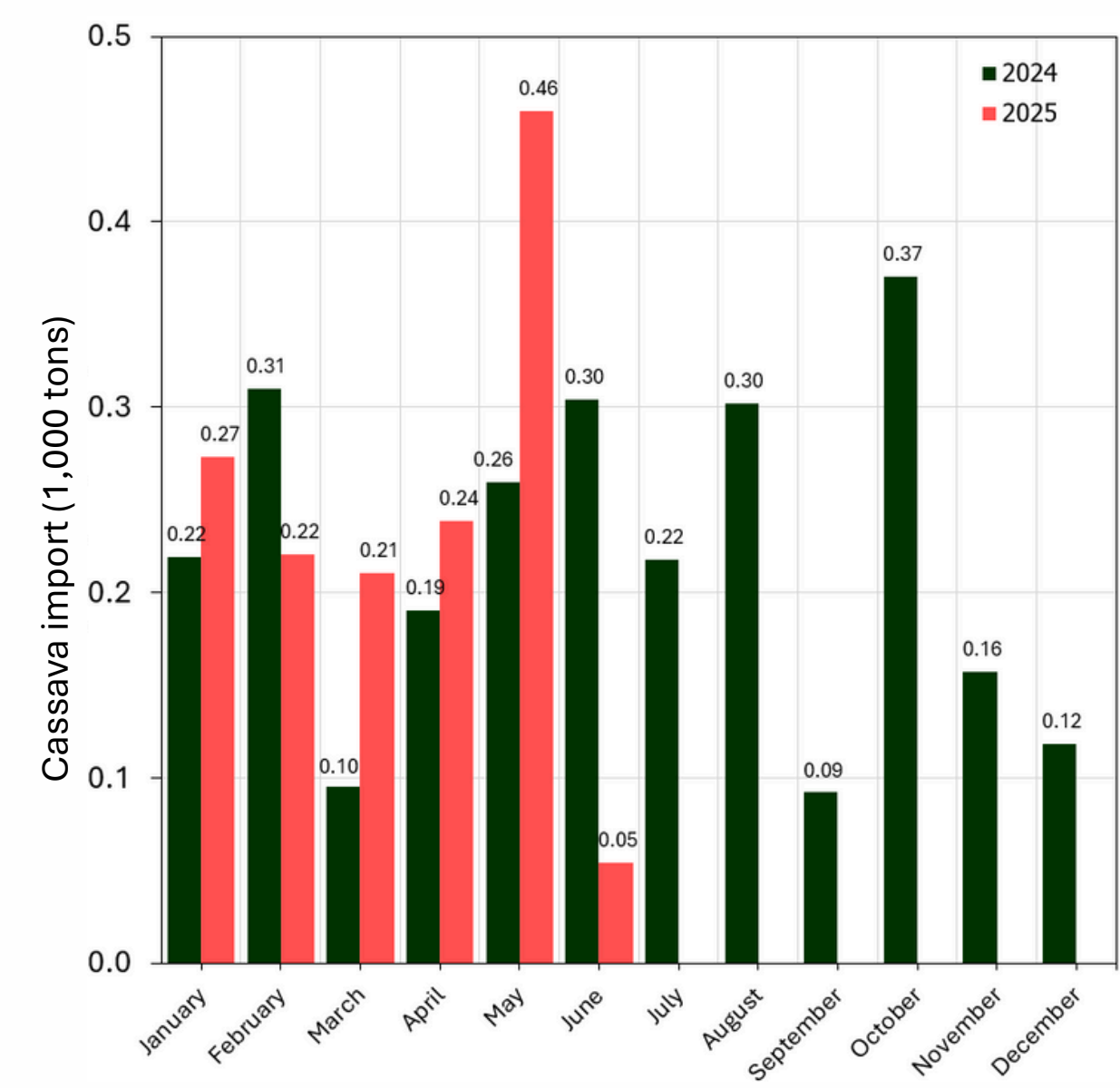


Figure 14: Monthly quantity of cassava import from 2024 to 2025

Crop Situation of Lao PDR in Crop Year 2024/2025



Lao PDR situation in crop year 2024/2025

Lao PDR is expected to experience favorable weather conditions in crop year 2024/2025, with sufficient water supply from irrigation systems and adequate sunlight for crop growth. During the rainy season, heavy rainfall ranging from 50–100 mm per day may occur. However, climate change and global warming are expected to affect agricultural production, with impacts such as extreme rainfall (La Niña) and natural disasters including flash floods, river overflows, and severe rainfall associated with tropical cyclones and typhoons. Moreover, regarding to the agricultural damage, major crops such as rice, maize, and cassava were affected. Rice suffered the most damage, with 19,049 hectares, or 94.4 percent lost due to climate-related events, followed by cassava with 119 hectares or 0.58 percent, and maize with 26 hectares or 0.13 percent.

However, the government and farmers are working together through training programs on disaster preparedness and response, as well as participatory planning at the village level to develop locally adapted solutions. The government is also promoting the adoption of new technologies, expanding market access, and improving credit availability under the Plan of Action for Disaster Risk Management in the Agriculture and Forestry Sector (2022–2025). Additionally, coordinated water management efforts between farmers and authorities aim to mitigate damage from future natural disasters.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, both the planted area and production are expected to increase. The expansion in the planted area is driven by rising rice prices, declining prices of the competing crops, and supportive government policies promoting rice production to ensure food security and commodity stability. Improved crop management practices and the use of high-quality rice varieties have also contributed to higher production levels. The harvest period for the wet season is expected from October to December 2025, while the dry season covered from March to May 2025. Regarding rice trade, import volumes were higher in the first half of 2024, with significant peaks in January (9,244 tons) and April (10,524 tons), before declining in the latter half of the year. In 2025, overall import volumes remained lower but showed moderate peaks in March (4,478.33 tons) and May (5,191 tons) (Figure 16). Meanwhile, rice exports increased substantially in the latter part of 2024 from 3,193 tons in October to nearly 10,000 tons in November–December, and continued strong exports in early 2025, particularly in February (10,588.33 tons) (Figure 17).

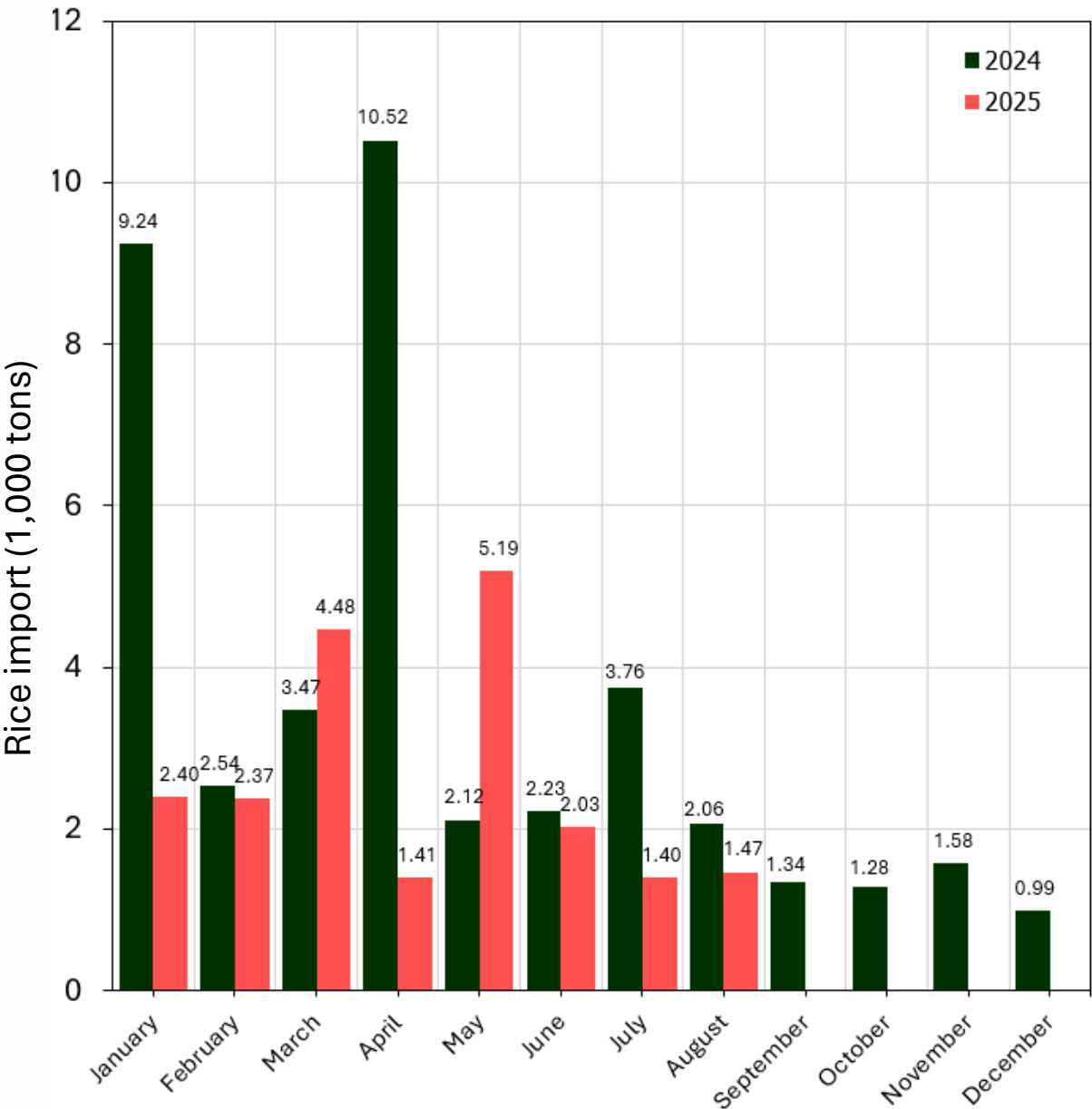


Figure 16: Monthly quantity of rice import from 2024 to 2025

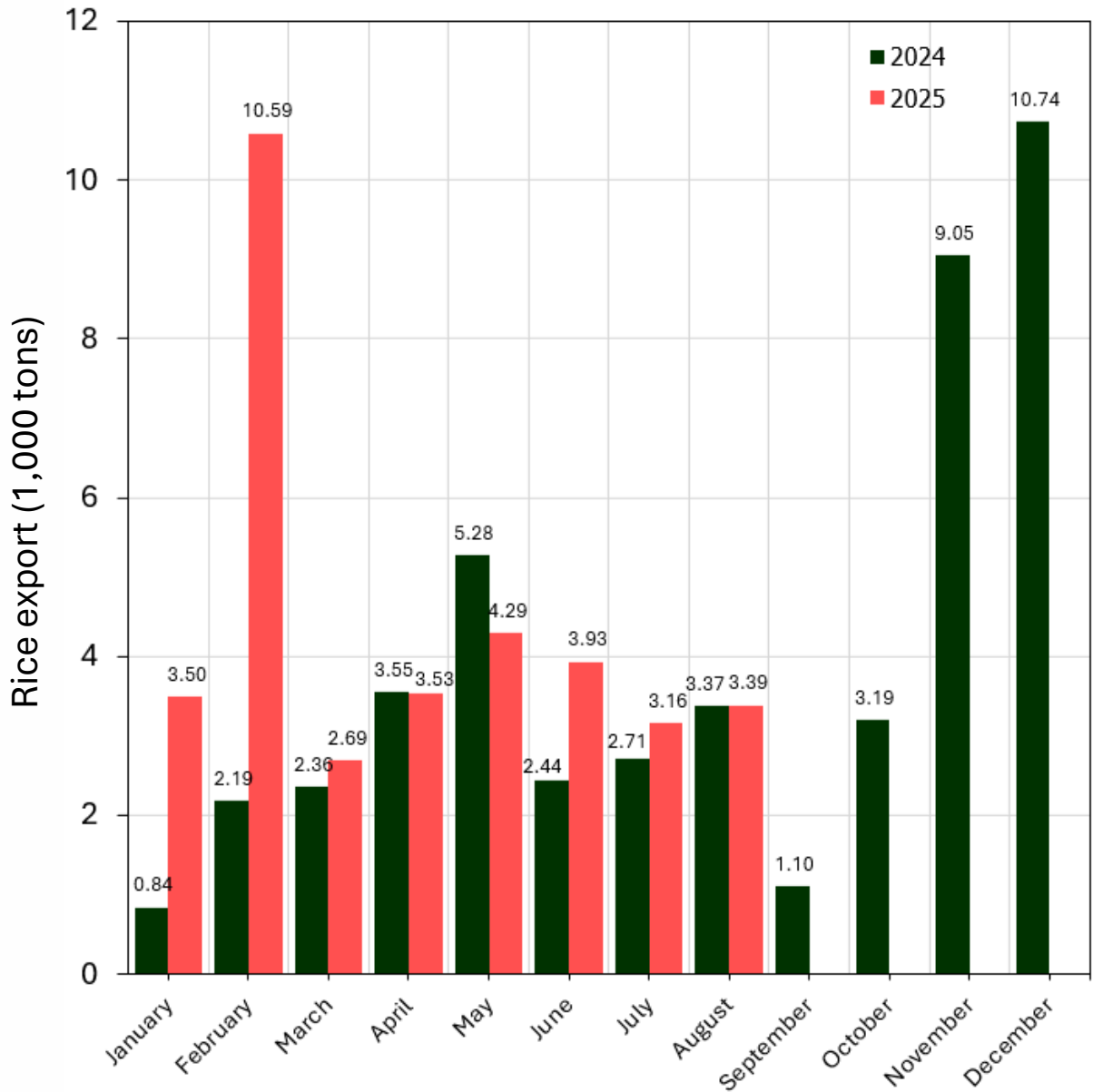


Figure 17: Monthly quantity of rice export from 2024 to 2025

For maize crops in crop year 2024/2025, both the planted area is expected to increase. The expansion in the planted area is driven by declining prices of the competing crops, and supportive government policies promoting rice production to ensure food security and commodity stability. Improved crop management practices and the use of high-quality rice varieties have also contributed to higher production levels. The harvest period for the wet season is expected from September to November 2025, while the dry season covered from January to May 2025. Regarding maize trade, import volumes were higher in the first half of 2024, with significant peaks in March (5,616 tons) due to rising domestic demand (Figure 18), while exports also increased in response to stronger demand from trading partner countries (Figure 19) .

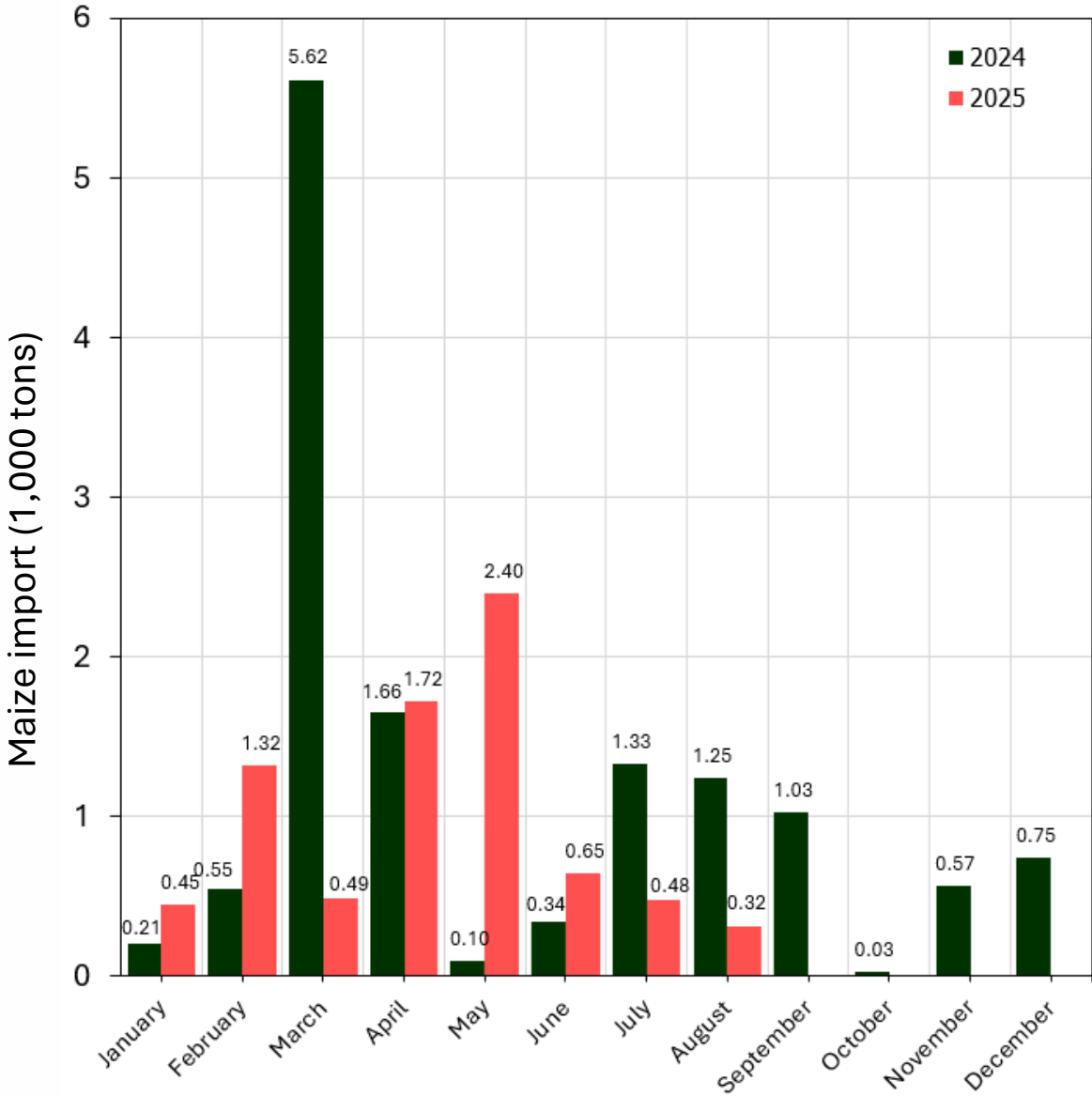


Figure 18: Monthly quantity of maize import from 2024 to 2025

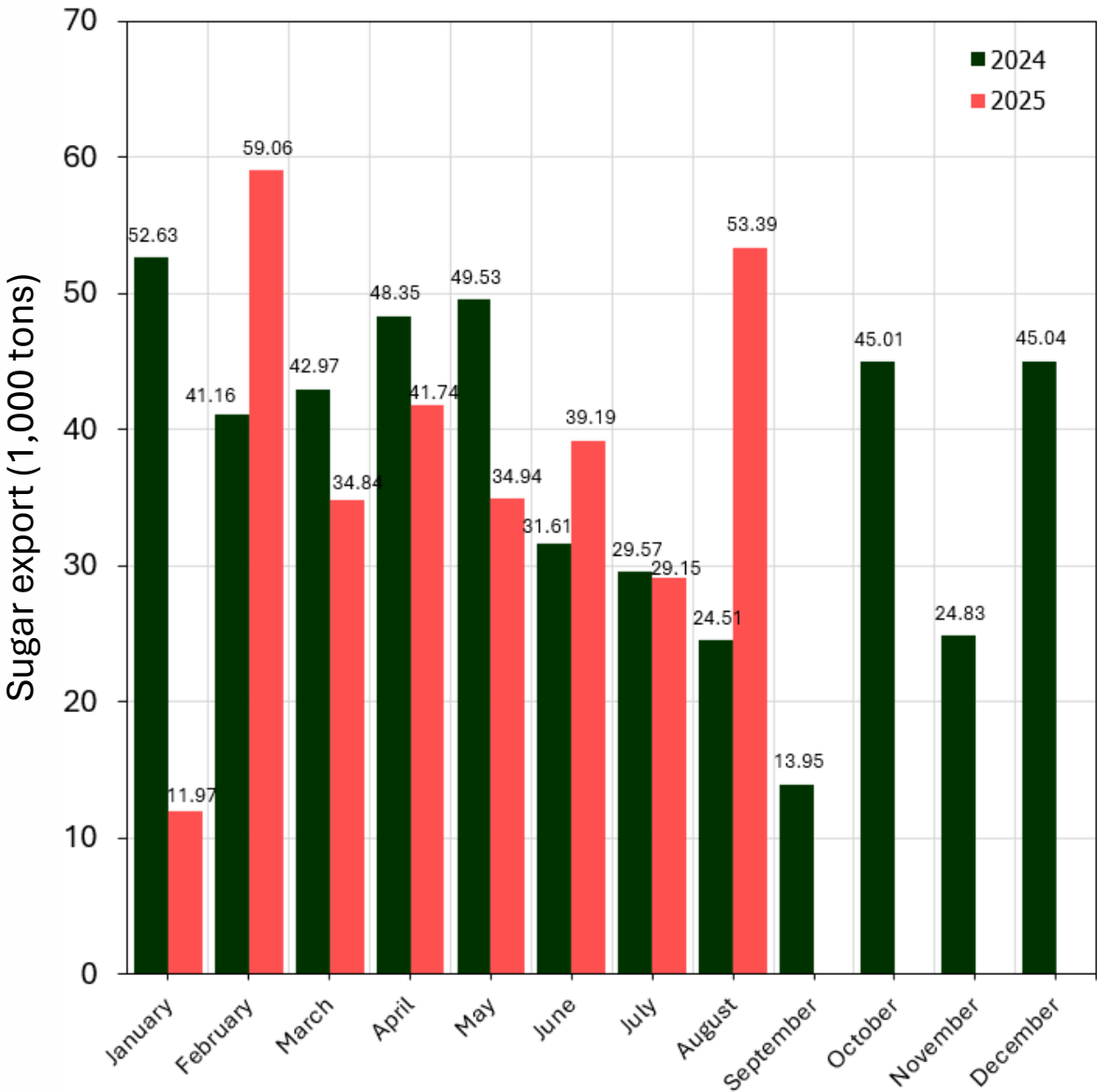


Figure 21: Monthly quantity of sugar export from 2024 to 2025

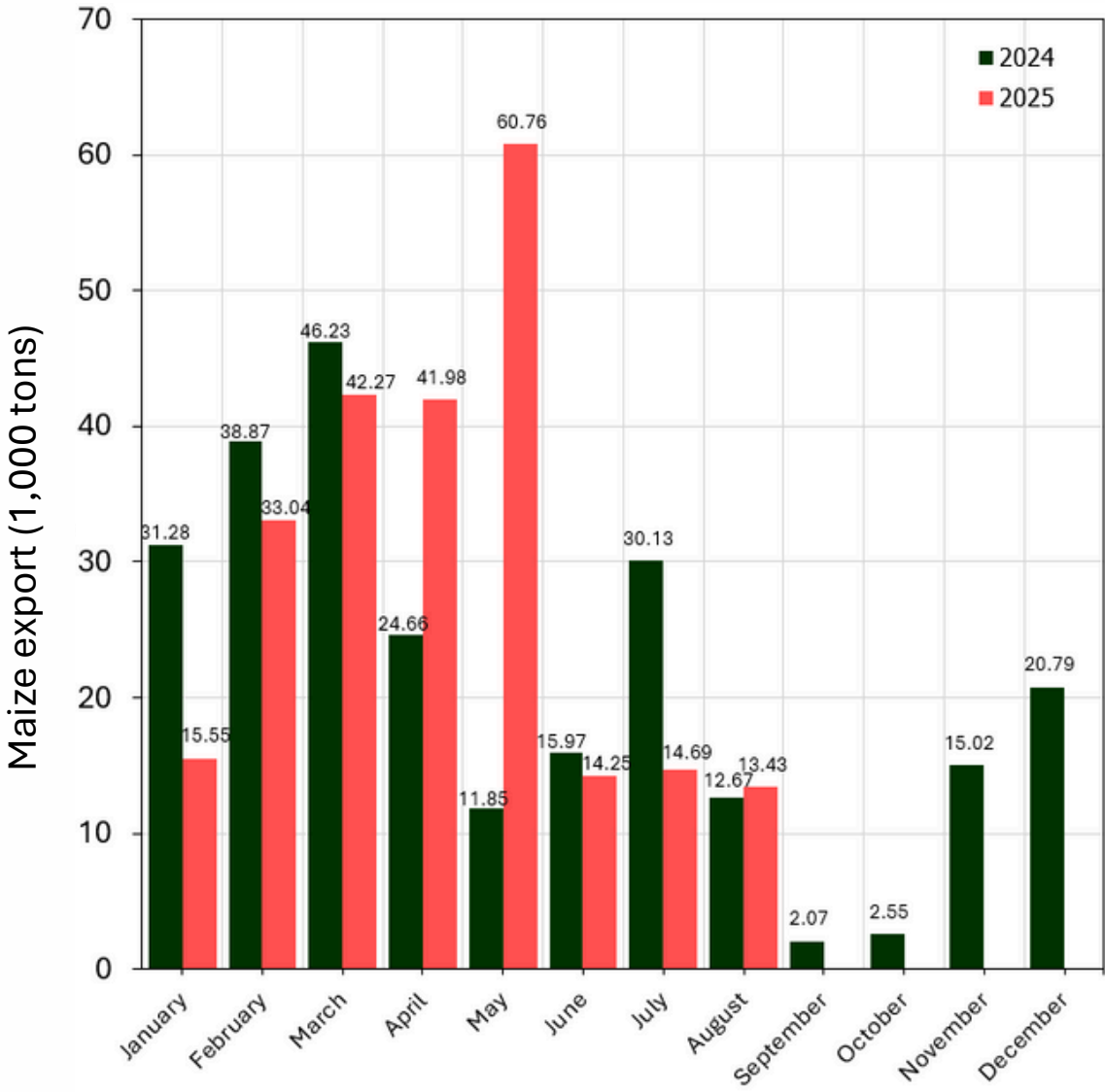


Figure 19: Monthly quantity of maize export from 2024 to 2025

For sugarcane crops in crop year 2024/2025, both the planted area is expected to increase. The expansion in the planted area is driven by declining prices of the competing crops, and supportive government policies promoting rice production to ensure food security and commodity stability. Improved crop management practices and the use of high-quality rice varieties have also contributed to higher production levels. The harvest period covered from January to May 2025. Regarding sugar trade, imports are expected to decrease due to declining domestic demand (Figure 20). Meanwhile, exports are expected to increase in respond to rising domestic demand (Figure 21).

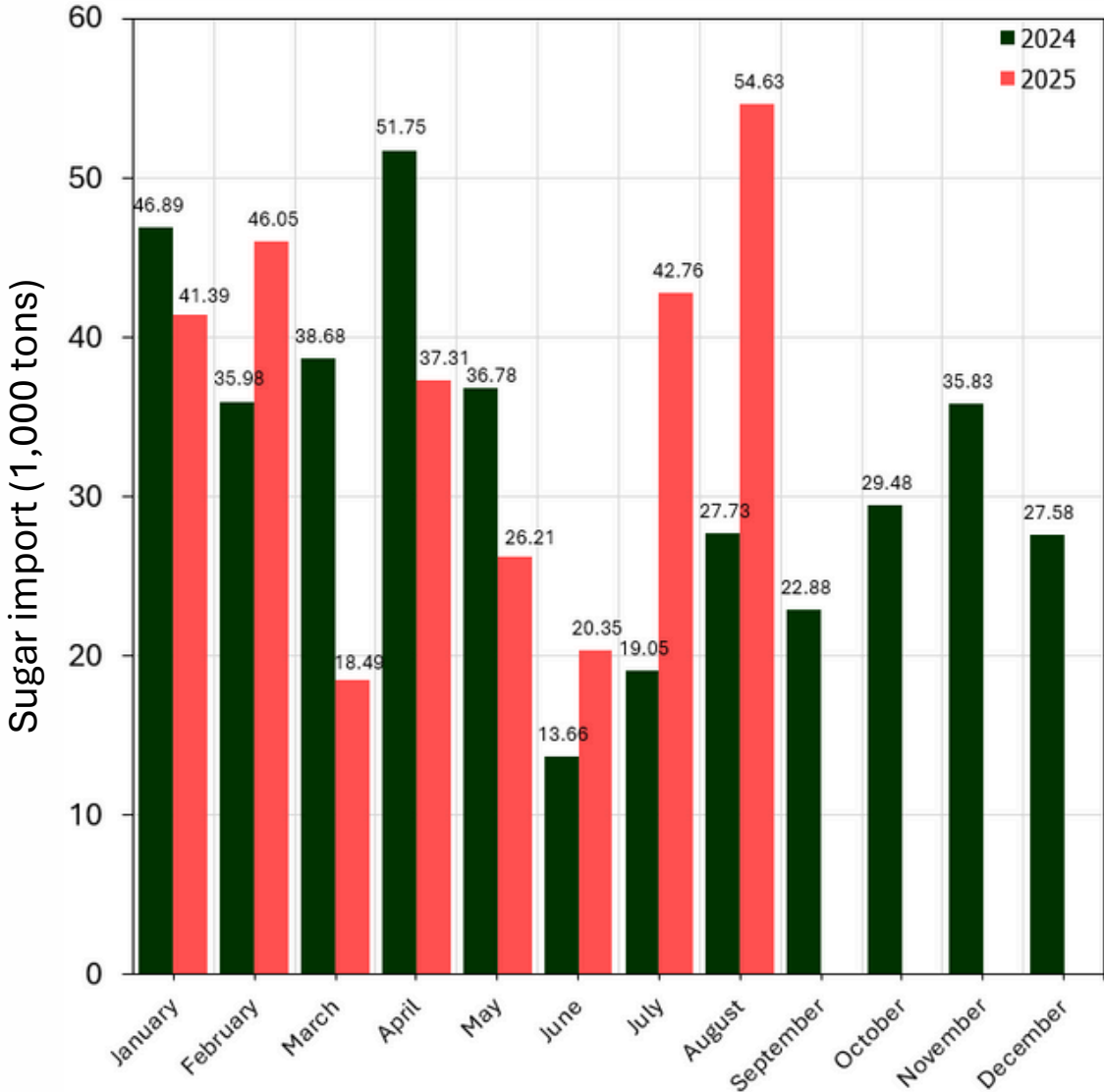


Figure 20: Monthly quantity of sugar import from 2024 to 2025

For soybeans crops in crop year 2024/2025, both the planted area and production are expected to increase. The expansion in the planted area is driven by rising rice prices, declining prices of the competing crops, and supportive government policies promoting rice production to ensure food security and commodity stability. Improved crop management practices and the use of high-quality rice varieties have also contributed to higher production levels. The soybean harvest period for the wet season have covered from September to November 2025, while the dry season began from February to March 2025. Regarding soybean trade, imports are forecast to increase due to rising domestic demand (Figure 22), while exports also increased in respond to stronger demand from trading partner countries (Figure 23).

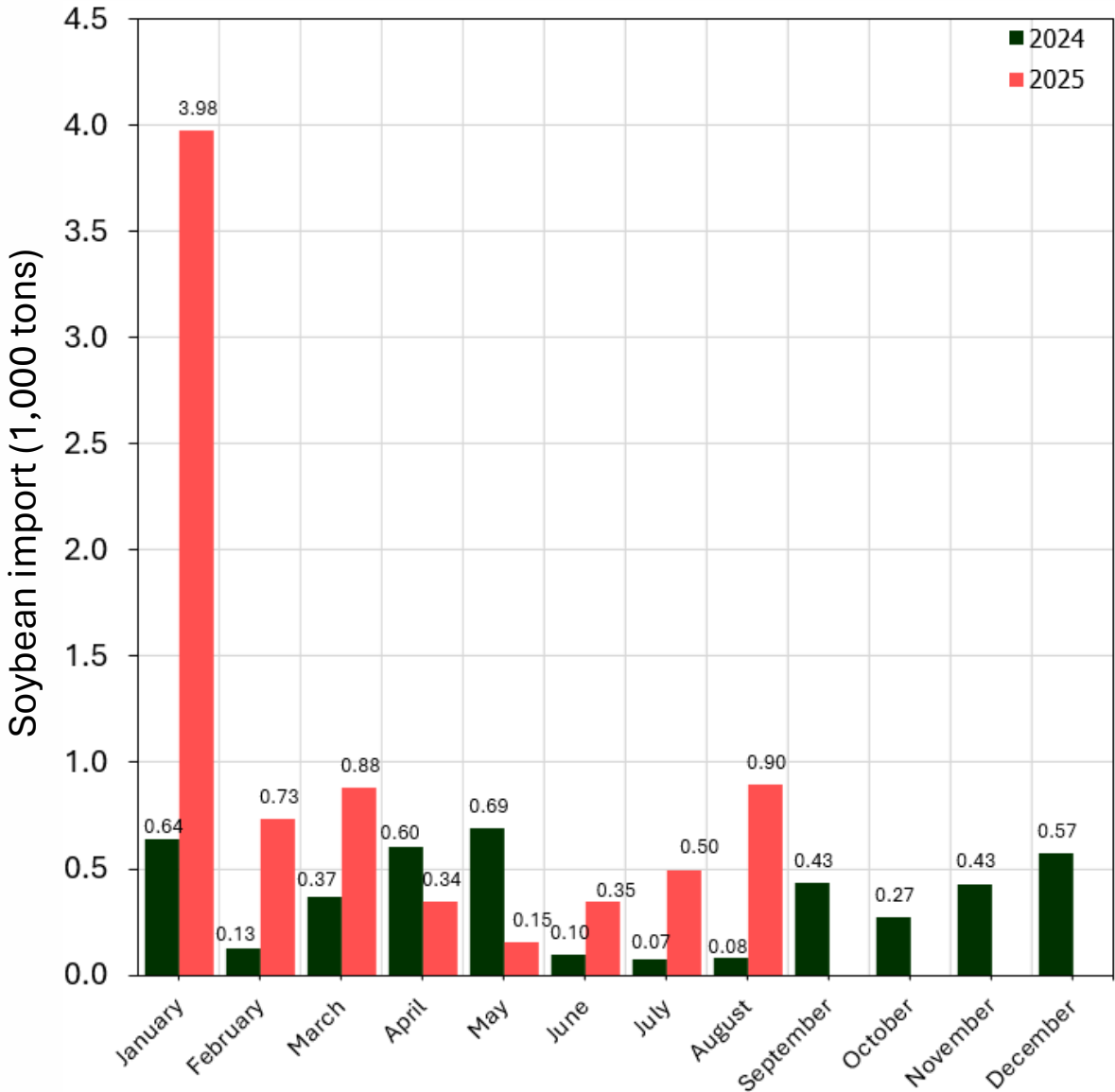


Figure 22: Monthly quantity of soybean import from 2024 to 2025

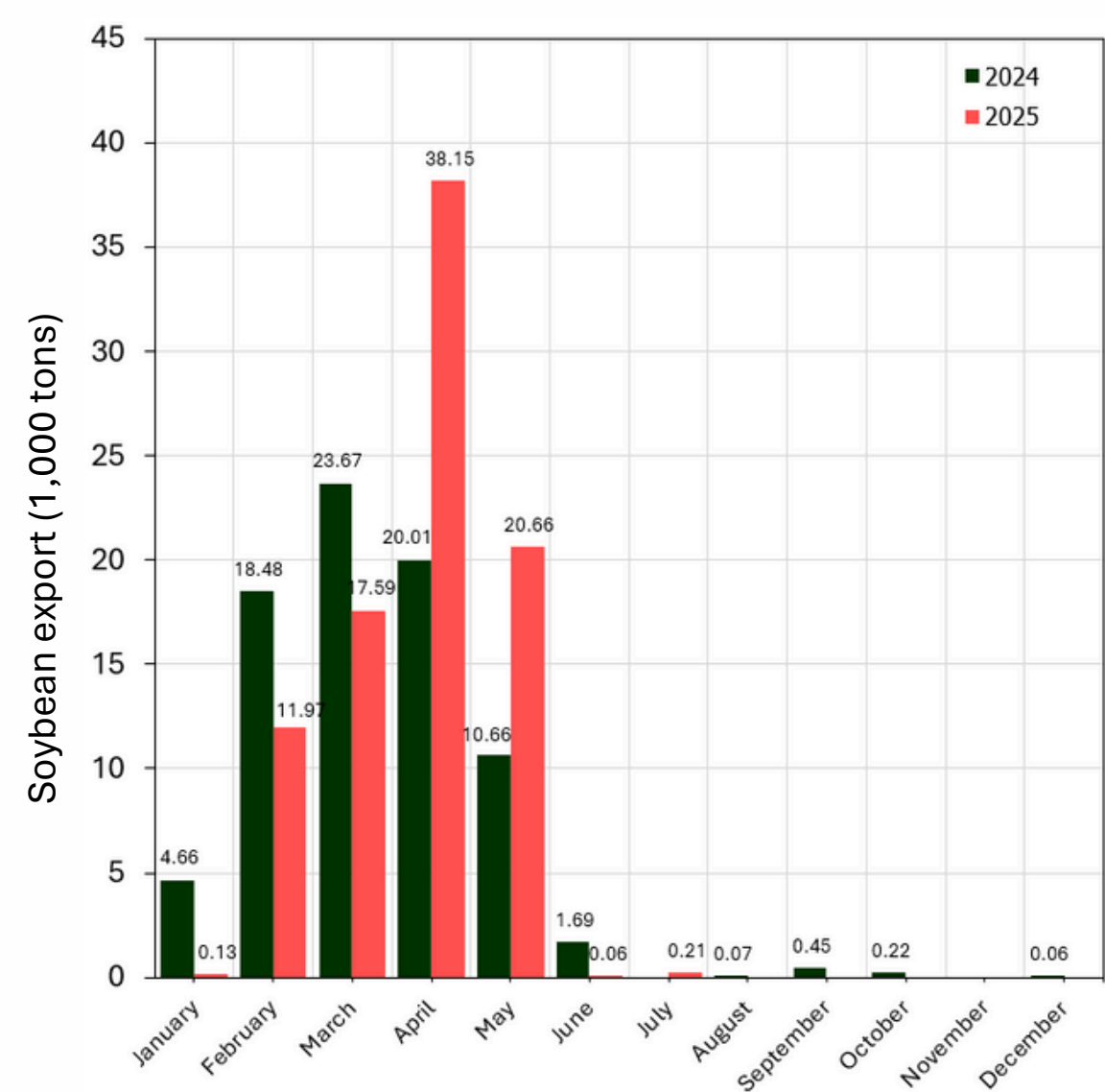


Figure 23: Monthly quantity of soybean export from 2024 to 2025

For cassava crops in crop year 2024/2025, both the planted area and production are expected to increase. The expansion in the planted area is driven by rising rice prices, declining prices of the competing crops, and supportive government policies promoting rice production to ensure food security and commodity stability. Improved crop management practices and the use of high-quality rice varieties have also contributed to higher production levels. The cassava harvest period covered from December 2024 to May 2025. Regarding cassava trade, imports are forecast to increase due to rising domestic demand (Figure 24), while exports are also expected to increase in respond to stronger demand from trading partner countries (Figure 25).

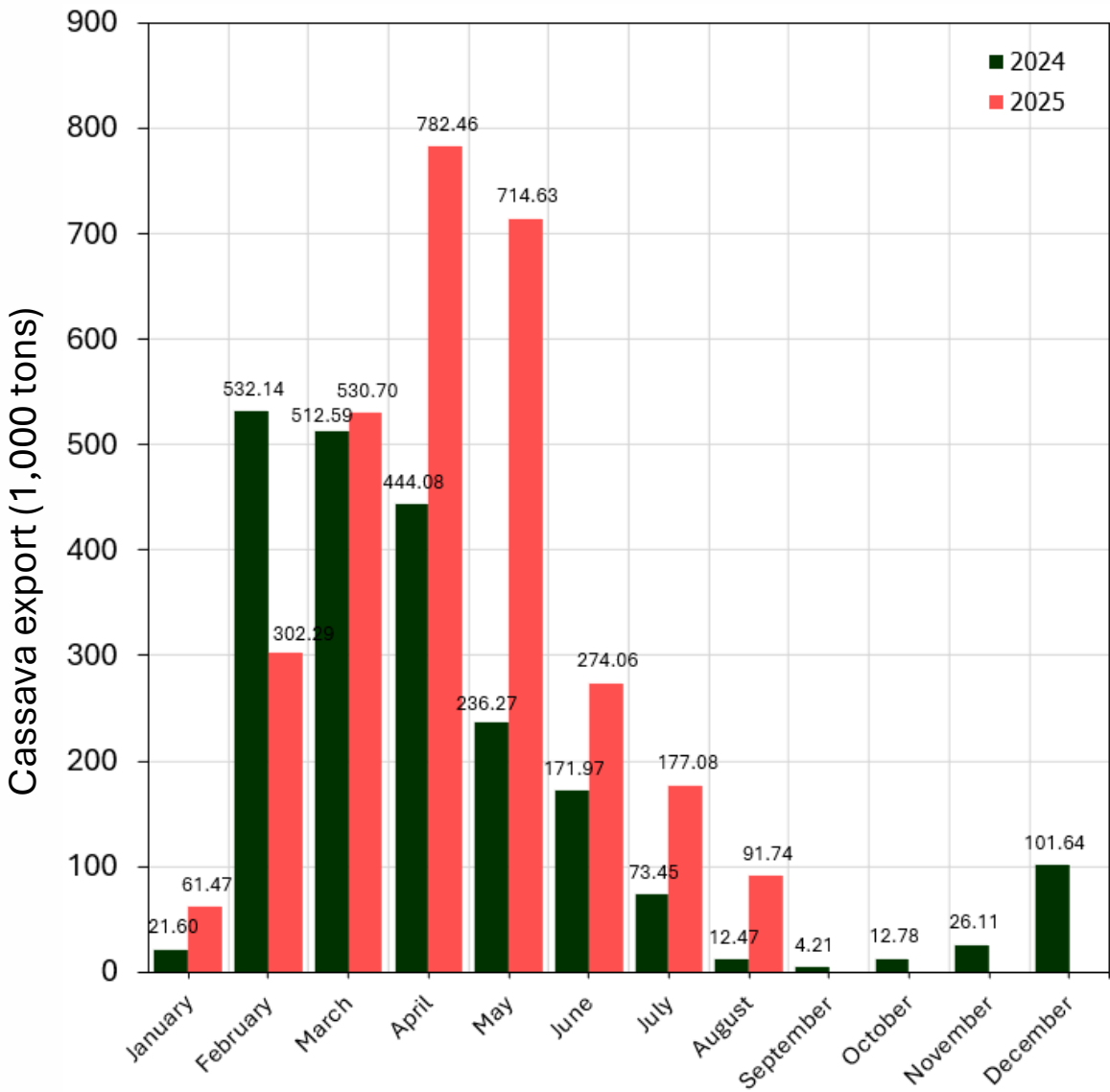


Figure 25: Monthly quantity of cassava export from 2024 to 2025

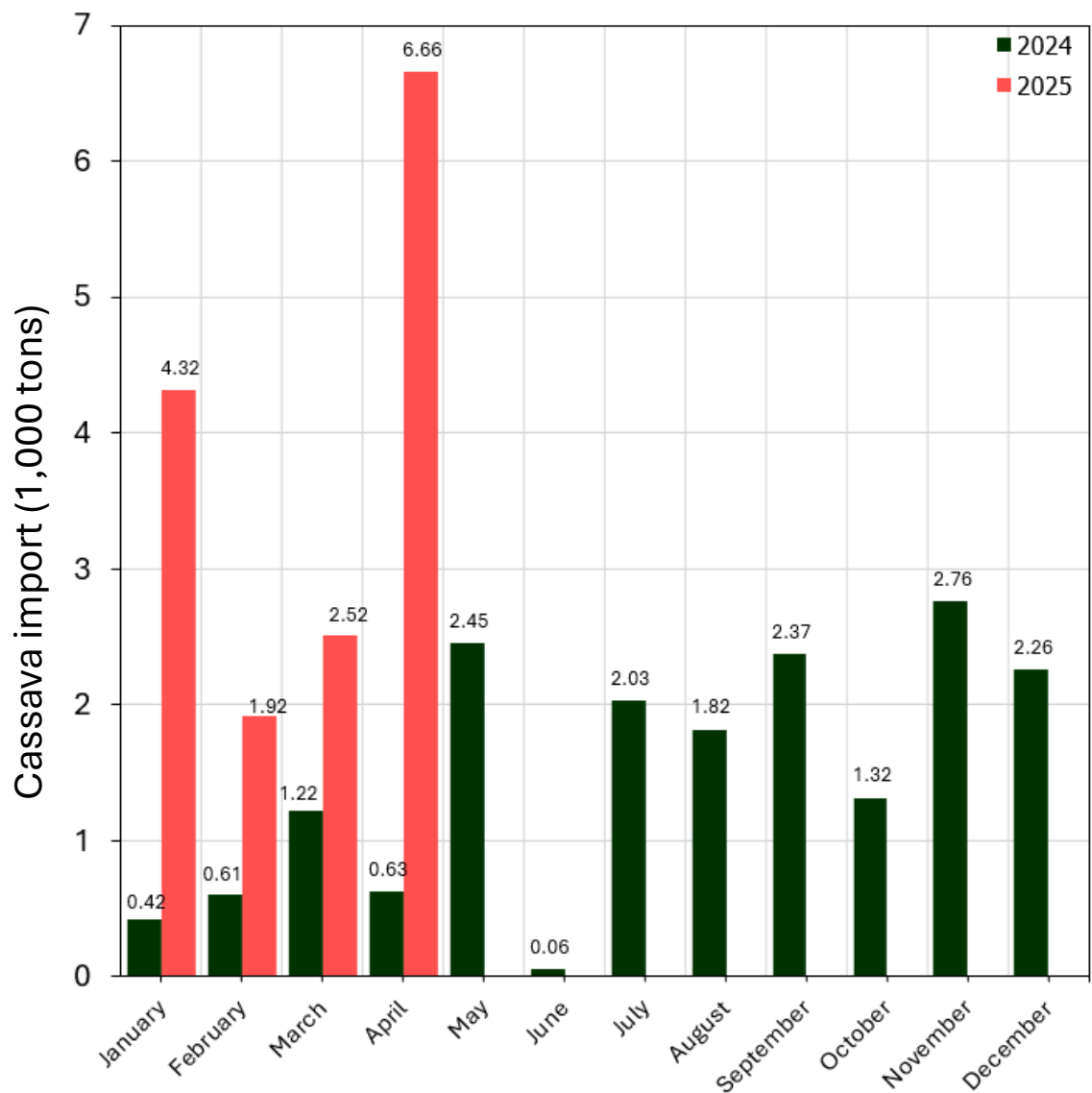


Figure 24: Monthly quantity of cassava import from 2024 to 2025

Crop Situation of Malaysia in Crop Year 2024/2025



Malaysia situation in crop year 2024/2025

The information on weather conditions in Malaysia for crop year 2024/2025 remains limited. However, the country is likely to experience impacts from natural disasters, particularly floods, which have affected agricultural areas in Kelantan, Sabah, Pahang, Kedah, Terengganu, Perlis, Melaka, Negeri Sembilan, Pulau Pinang, and Perak. These events have been reported to damage approximately 3,332.14 hectares of rice crops, mainly due to the effects of climate change and global warming.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the harvest period for the wet season covered from November 2024 to May 2025, while the dry season harvest covered from June to October 2025. Regarding rice trade, imports are expected to decrease due to sufficient domestic rice availability that meets local demand. The data indicate that import volumes were higher in the first half of 2024 compared with 2025, with a significant peak of 281,760.83 tons in April 2024, while in 2025, the highest import volumes ranged between 132,000–138,000 tons during the same period (Figure 26). Meanwhile, exports are expected to increase due to rising demand for Malaysian premium rice in niche markets, as reflected in the graph showing higher export volumes in the second half of 2025, ranging between 15,400–19,700 tons, which is notably higher than in 2024 (Figure 27).

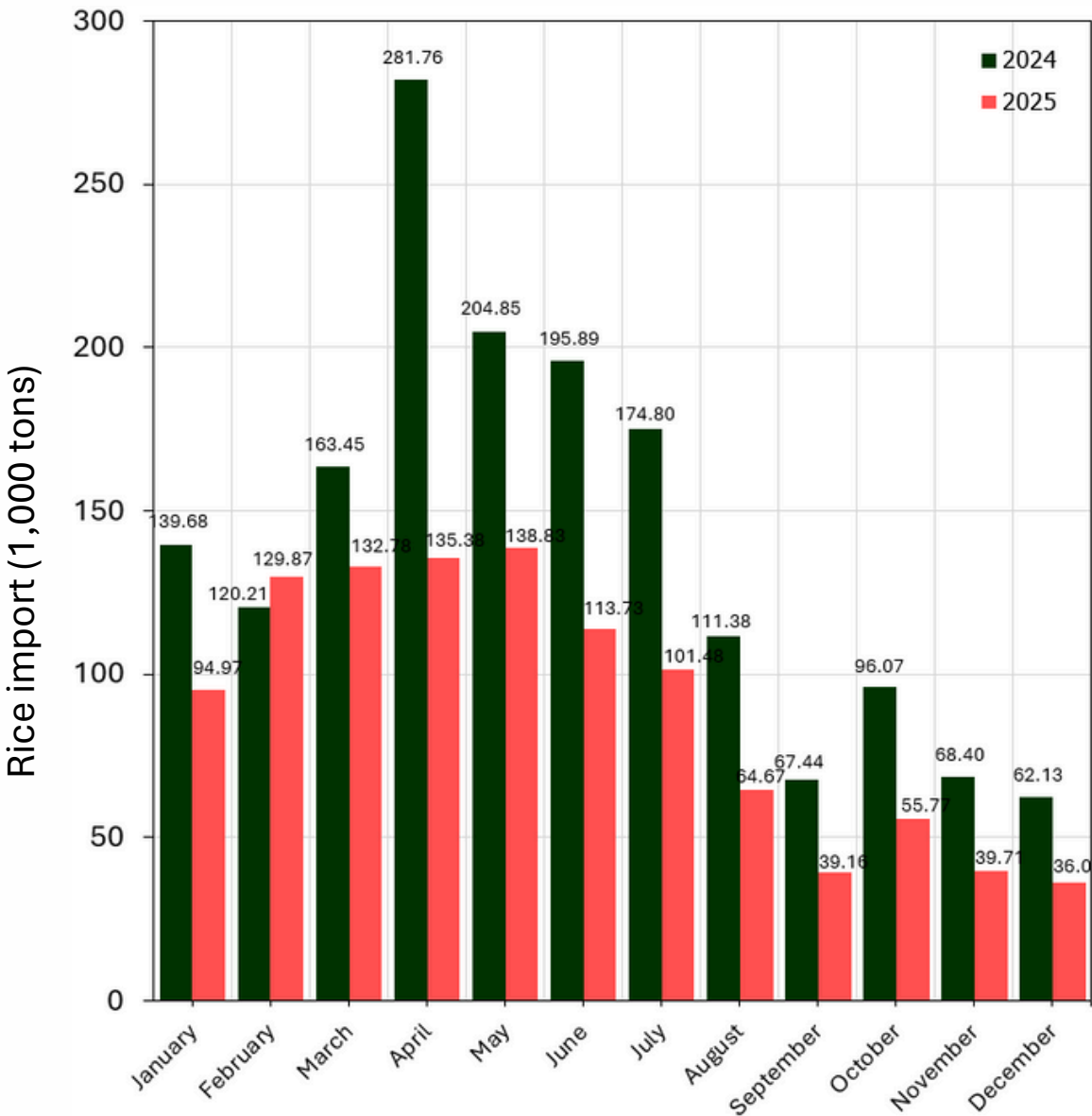


Figure 26: Monthly quantity of rice import from 2024 to 2025 (forecast)

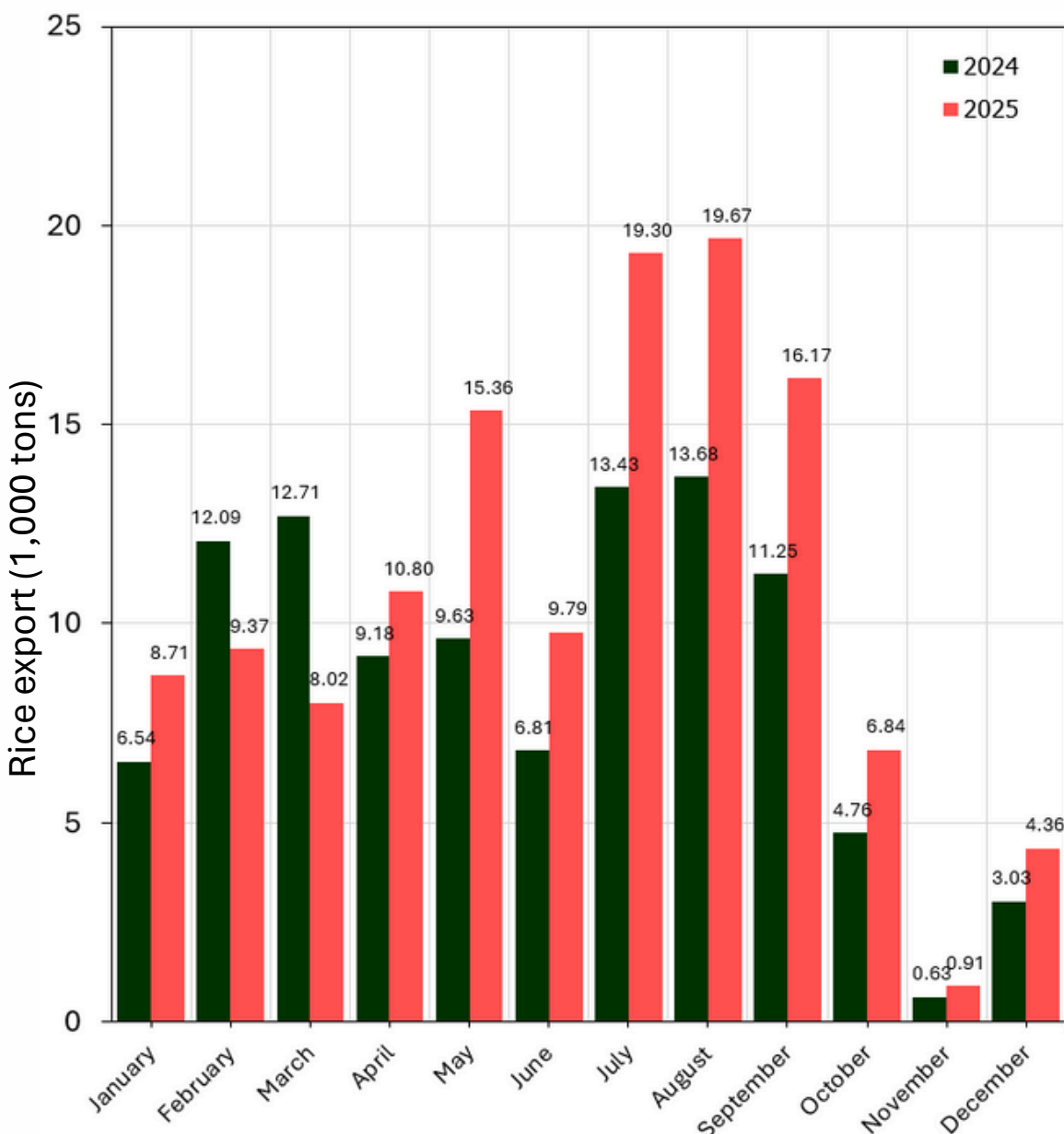


Figure 27: Monthly quantity of rice export from 2024 to 2025 (forecast)

For maize crops in crop year 2024/2025, maize imports are forecast to increase due to rising demand from the feed industry, as shown in the graph indicating higher volumes during the early months of 2025. In the second half of both 2024 and 2025, imports follow a similar trend, though the overall volume in 2025 is slightly lower than in 2024 (Figure 28). Exports are also expected to increase in response to strong demand from trading partners, with a significant export volume of 1,285.18 tons recorded in January 2024, and a peak of 1,595.91 tons observed in July 2025 (Figure 29).

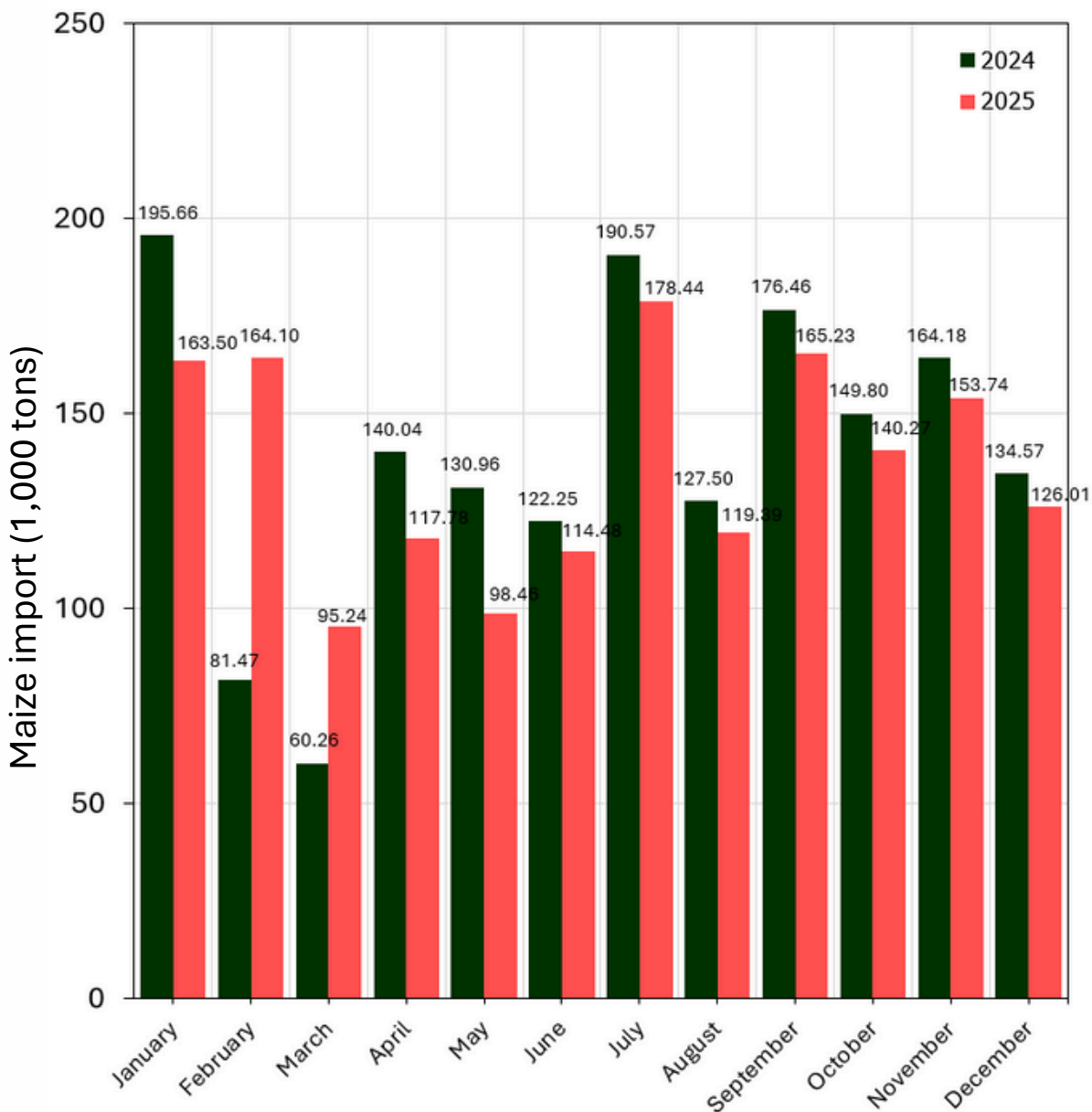


Figure 28: Monthly quantity of maize import from 2024 to 2025 (forecast)

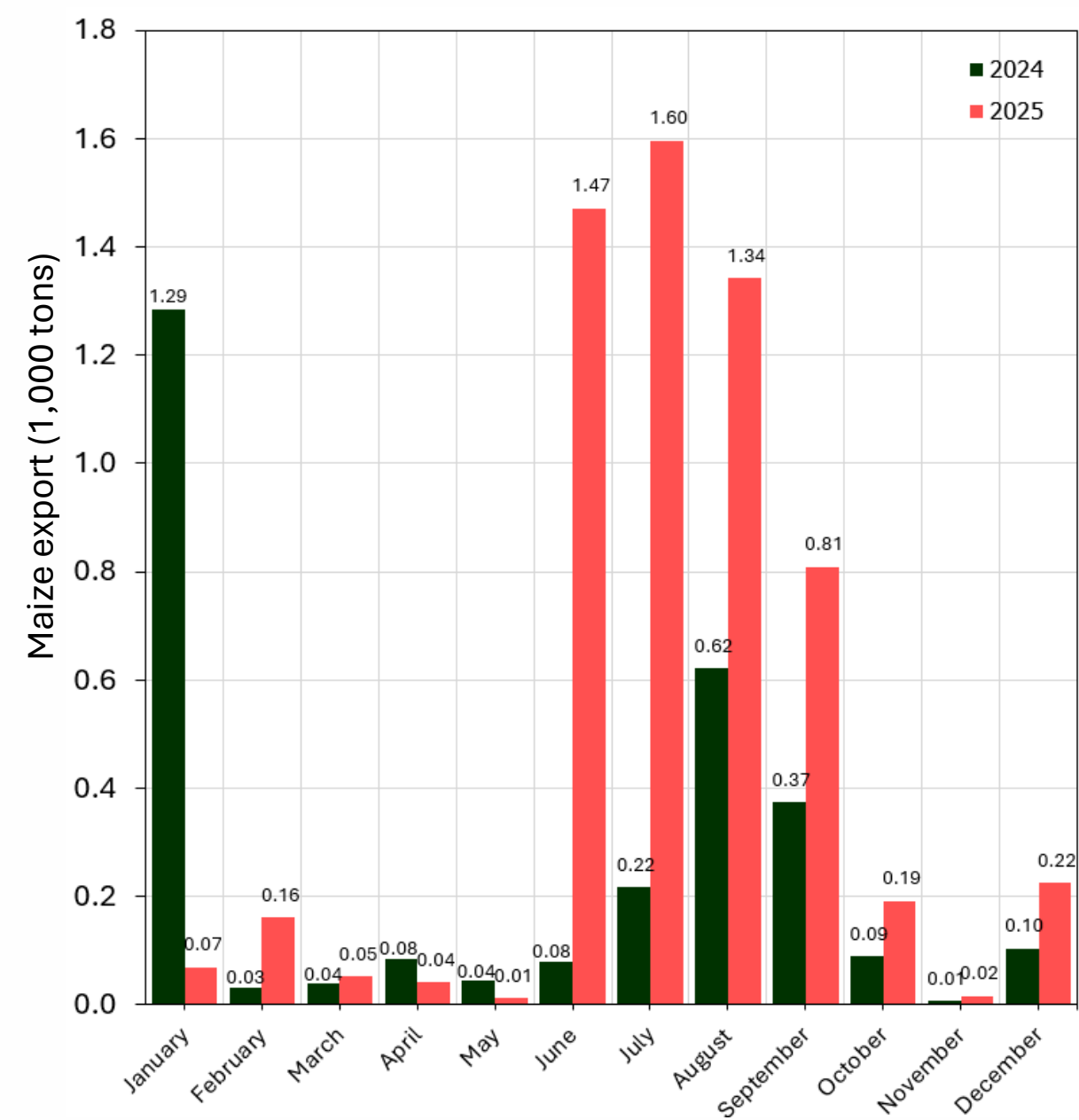


Figure 29: Monthly quantity of maize export from 2024 to 2025 (forecast)

For sugar crops in crop year 2024/2025, imports are forecast to increase due to declining domestic production. The graph shows that import volumes in the first half of 2025 peaked in May at approximately 215,573.58 tons, before dropping to around 102,000–107,000 tons in October (Figure 30). Meanwhile, exports are forecast to decrease due to a smaller harvest, with high export volumes recorded between 23,600–25,900 tons in the first half of 2025, followed by a decline in the latter part of the year (Figure 31).

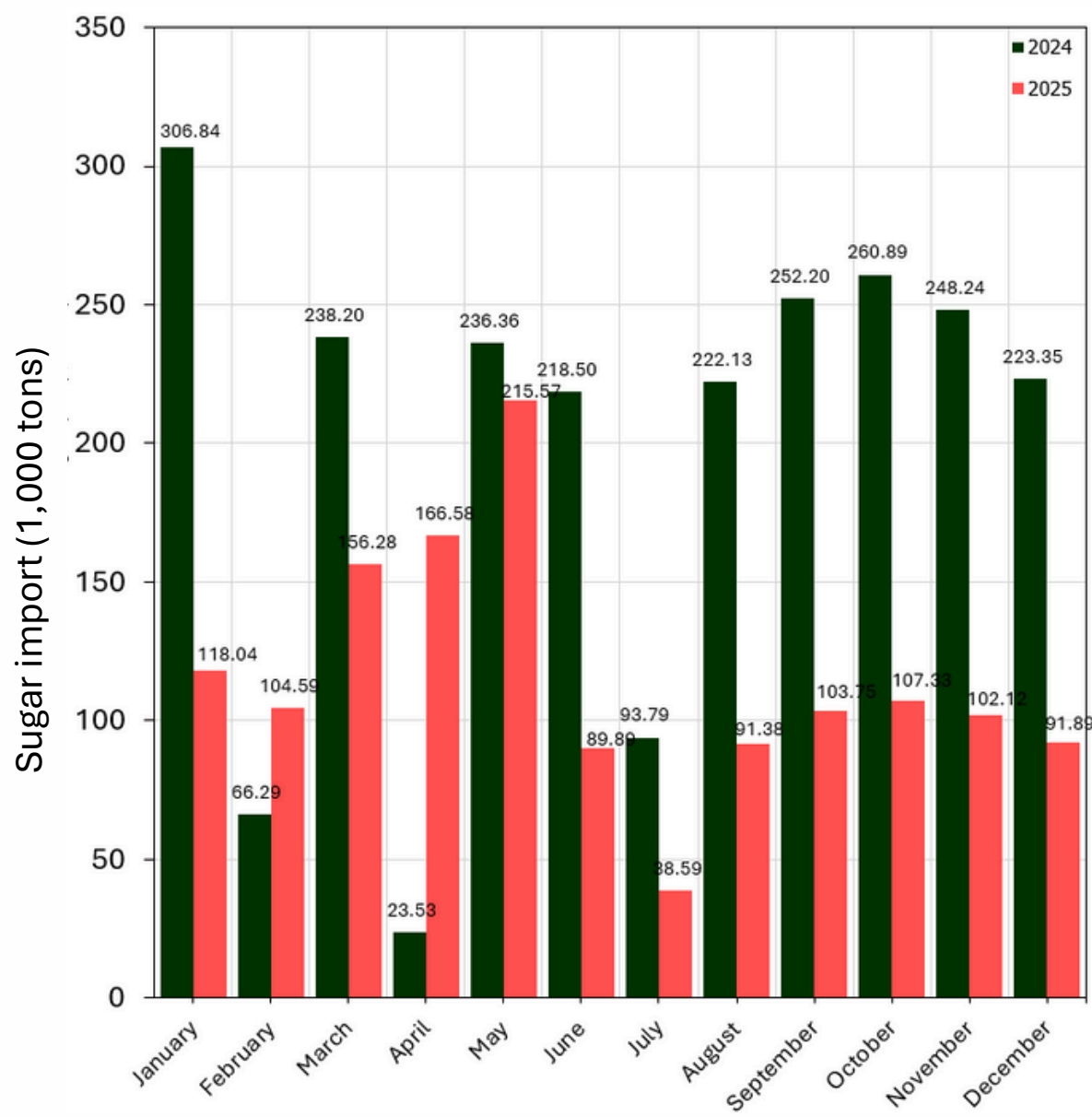


Figure 30: Monthly quantity of sugar import from 2024 to 2025 (forecast)

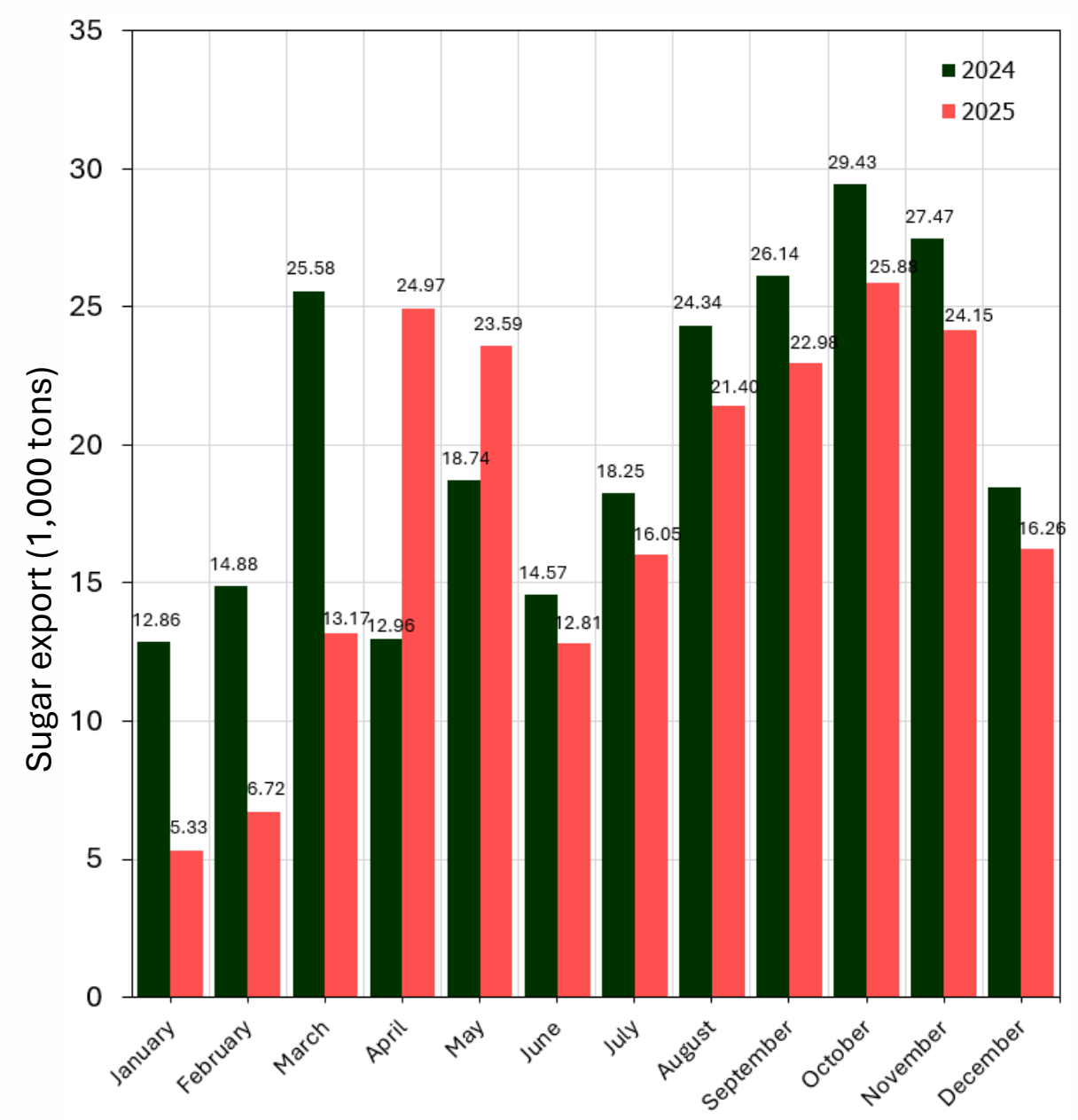


Figure 31: Monthly quantity of sugar export from 2024 to 2025 (forecast)

For soybean crops in crop year 2024/2025, imports are expected to increase to meet the growing demand from the food and feed processing industries. The graph shows that imports peaked at 161,849.94 tons in July 2025, with overall volumes remaining higher than in 2024 (Figure 32). However, exports are forecast to decline throughout 2025 due to limited supply (Figure 33).

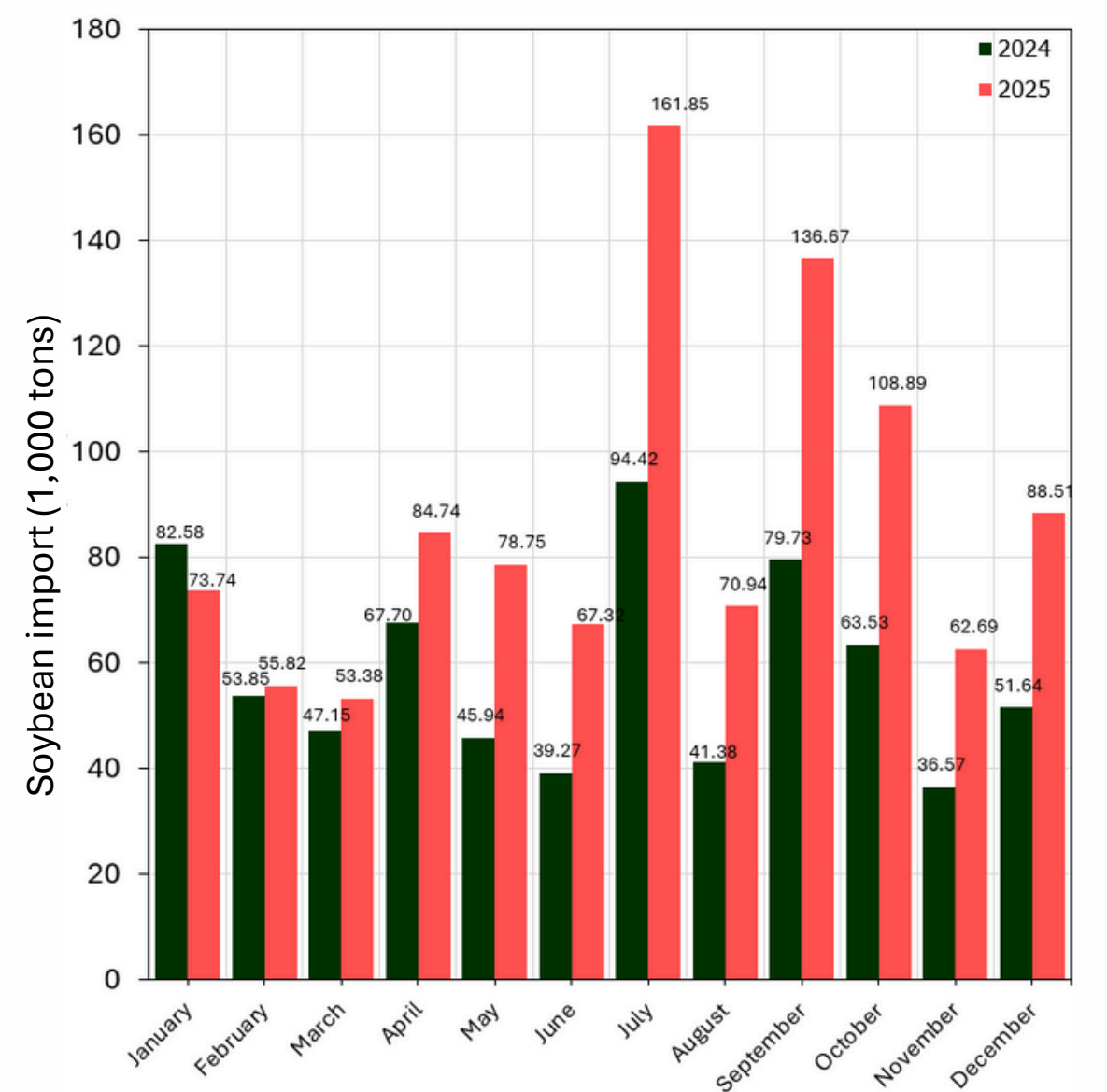


Figure 32: Monthly quantity of soybean import from 2024 to 2025 (forecast)

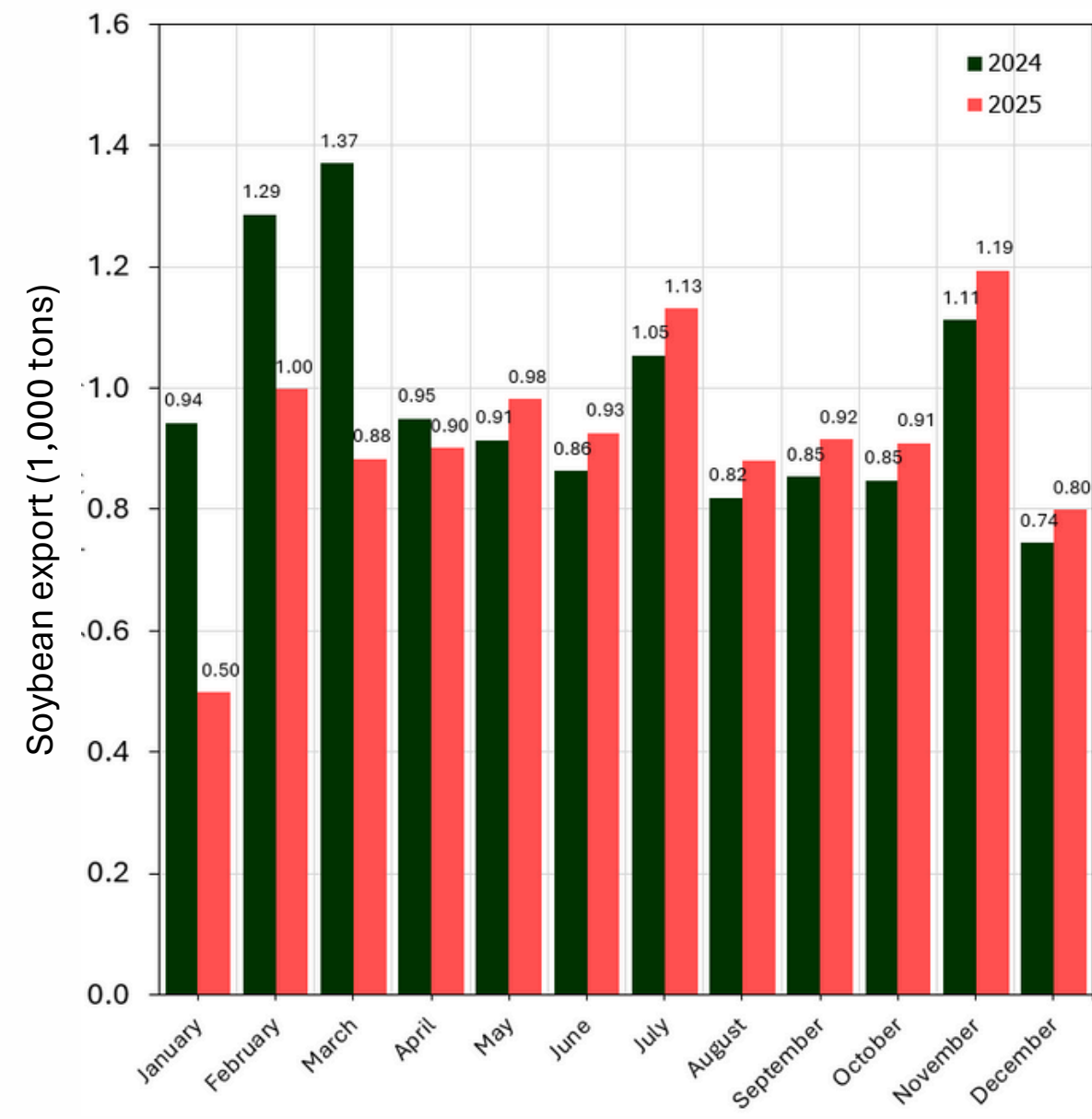


Figure 33: Monthly quantity of soybean export from 2024 to 2025 (forecast)

For cassava crops in crop year 2024/2025, the harvest period extends throughout the year. Imports are forecast to decrease as domestic production is sufficient to meet local demand. However, data show that import volumes increased slightly in the second half of 2025 (Figure 34). Meanwhile, exports are expected to decrease due to reduced demand from international buyers in the first half of 2025, before rebounding in the second half of the year (Figure 35).

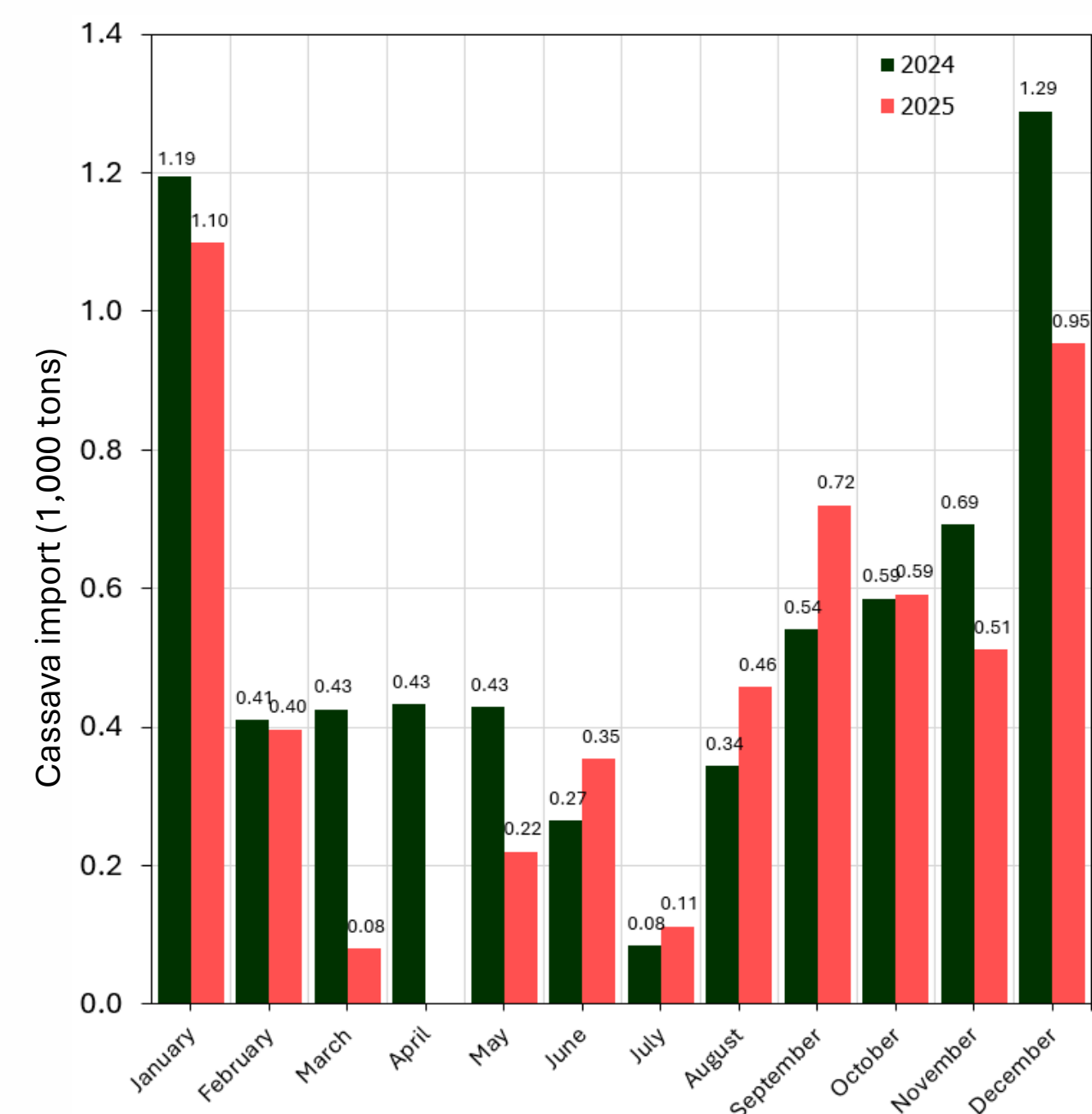


Figure 34: Monthly quantity of cassava import from 2024 to 2025 (forecast)

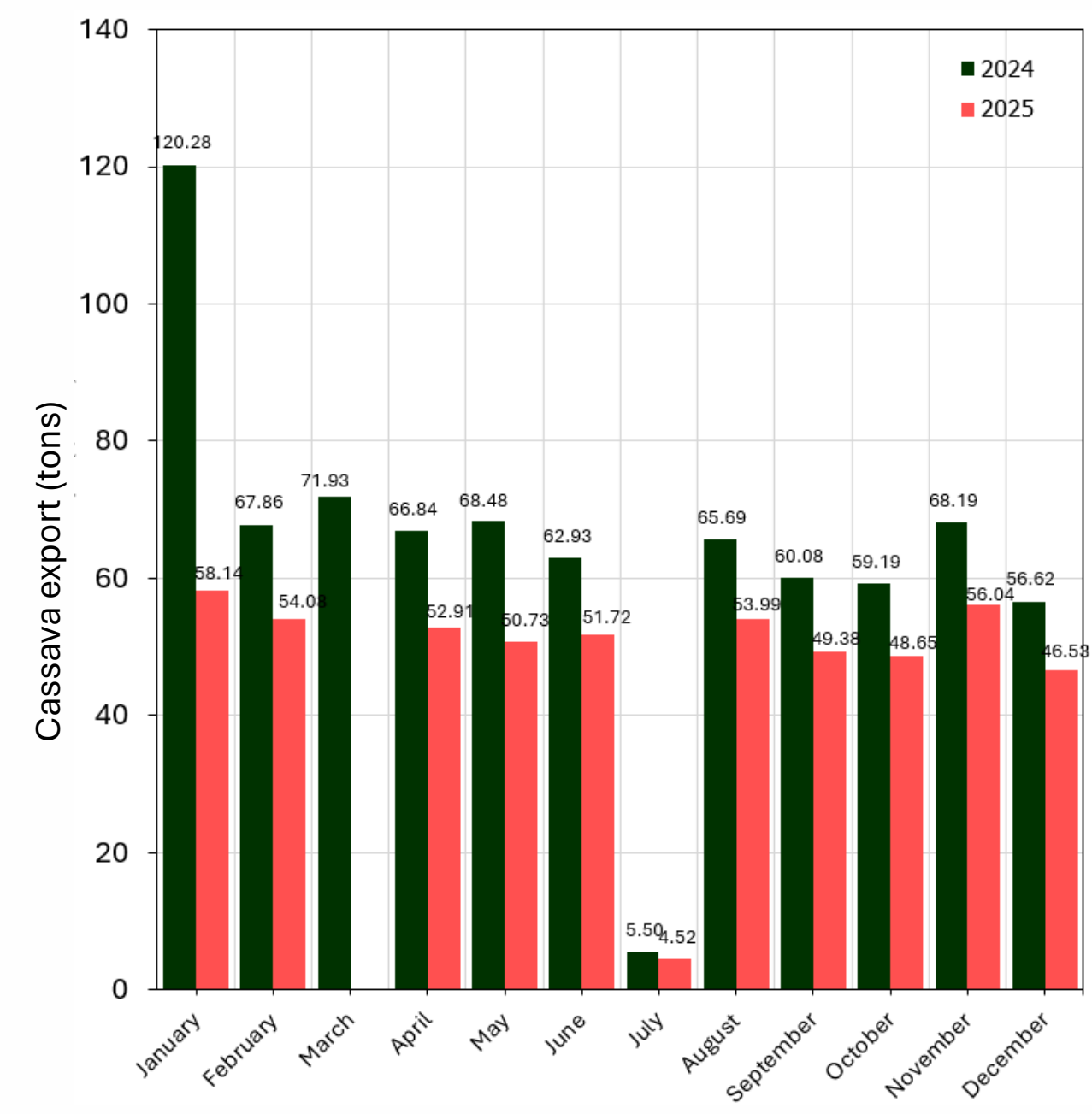


Figure 35: Monthly quantity of cassava export from 2024 to 2025 (forecast)

Crop Situation of Myanmar in Crop Year 2024/2025



Myanmar situation in crop year 2024/2025

Myanmar is expected to experience generally favorable weather conditions, with sufficient water resources to support agricultural crop needs, including irrigation, and adequate sunlight for plant growth. In 2025, the country is projected to receive moderate rainfall (20–50 mm per day) to heavy rainfall (50–100 mm per day). However, the effects of climate change and global warming have led to higher-than-usual temperatures during both day and night, posing challenges for crop production.

Several regions, including Nay Pyi Taw, Kachin, Kayah, Kayin, Sagaing, Tanintharyi, Bago, Magway, Mandalay, Mon, Yangon, Shan, and Ayeyarwaddy, have reported landslide and flood impacts, while other disaster events, such as hailstorms in Kachin, cliff collapses in Sagaing, and soil erosion in Magway, have also been recorded. These incidents have caused significant damage to agricultural areas, affecting approximately 135,278 hectares of rice, 6,124 hectares of maize, 36 hectares of sugarcane, 571 hectares of soybean, and 419 hectares of cassava.

Despite these challenges, farmers are collaborating with the government to manage and protect agricultural production. Adaptation strategies include adjusting cultivation plans and planting schedules, as well as using crop varieties resistant to climate stress. The government is also implementing mitigation policies to reduce disaster-related risks, such as promoting new technologies and enhancing market access for farmers.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, both the planted area and production data are expected to increase. The expansion in the planted area is driven by favorable weather conditions and government policies. Improved crop management practices and the use of high-quality of rice varieties are also contributed to higher production levels. The harvest period for the wet season covered from August 2024 to February 2025, while the dry season covered from February to August 2025. Regarding rice trade, no imports were reported in 2024. Exports recorded high volumes during the early and second half of 2024, peaking at 246,041 tons in November, with some fluctuations. A similar export trend continued in 2025, although higher export volumes were observed in mid-2025 (Figure 36).

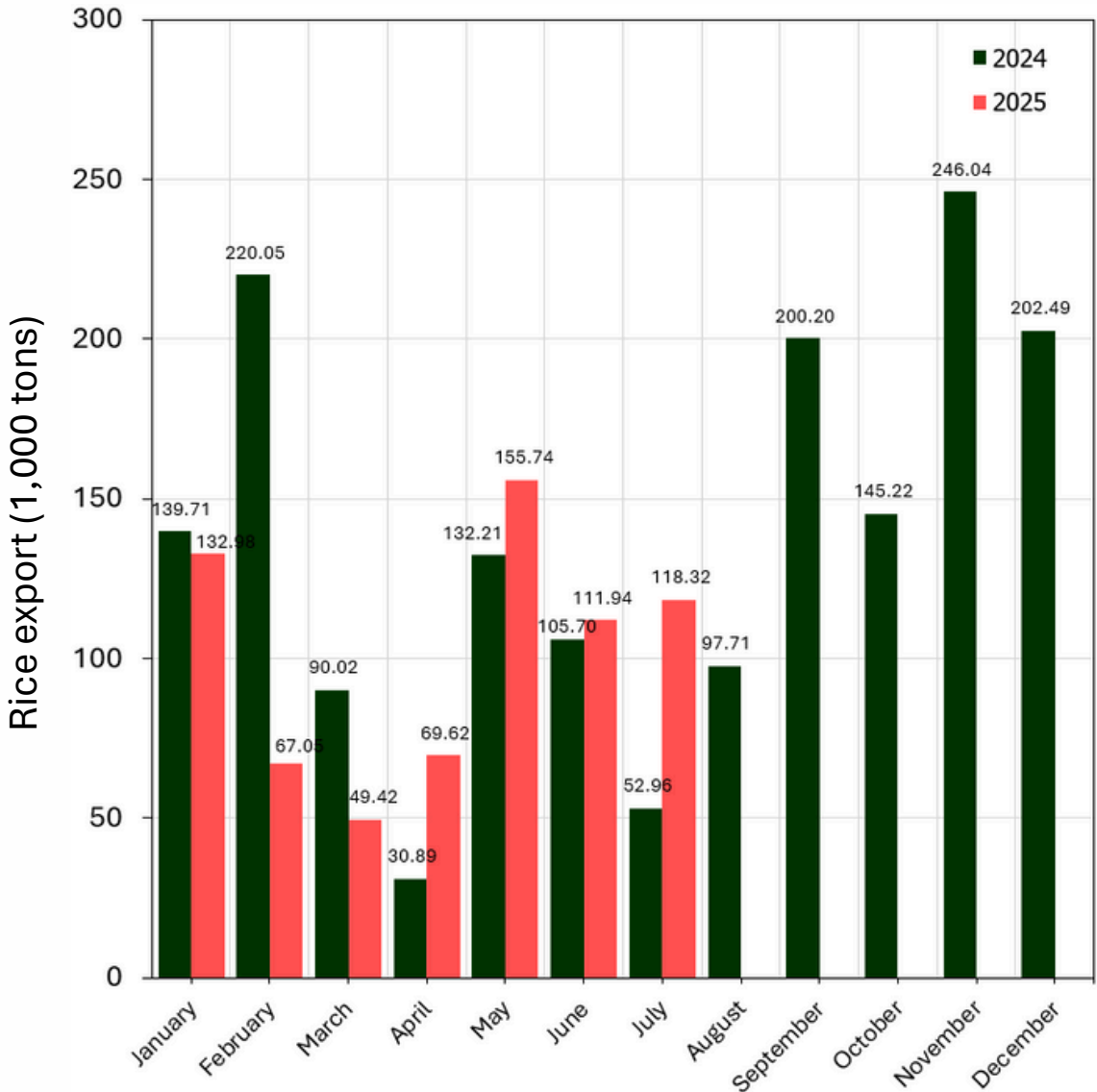


Figure 36: Monthly quantity of rice export from 2024 to 2025

For maize crops in crop year 2024/2025, both the planted area and production data are expected to increase. The expansion in the planted area is driven by favorable weather conditions, rising maize prices, and supportive government policies. Improved crop management practices and the use of high-quality of rice varieties are also contributed to higher production levels. The harvest period for the wet season covered from August toward December 2024, while the dry season covered from January to May 2025. Regarding maize trade, maize imports fluctuated throughout 2024, peaking around mid-year, while exports increased in 2025 compared to 2024, reaching a peak at 282,020 tons in February (Figure 37). In contrast, exports in 2024 were relatively higher during the first half of the year, while in 2025, export volumes were lower in the same period (Figure 38).

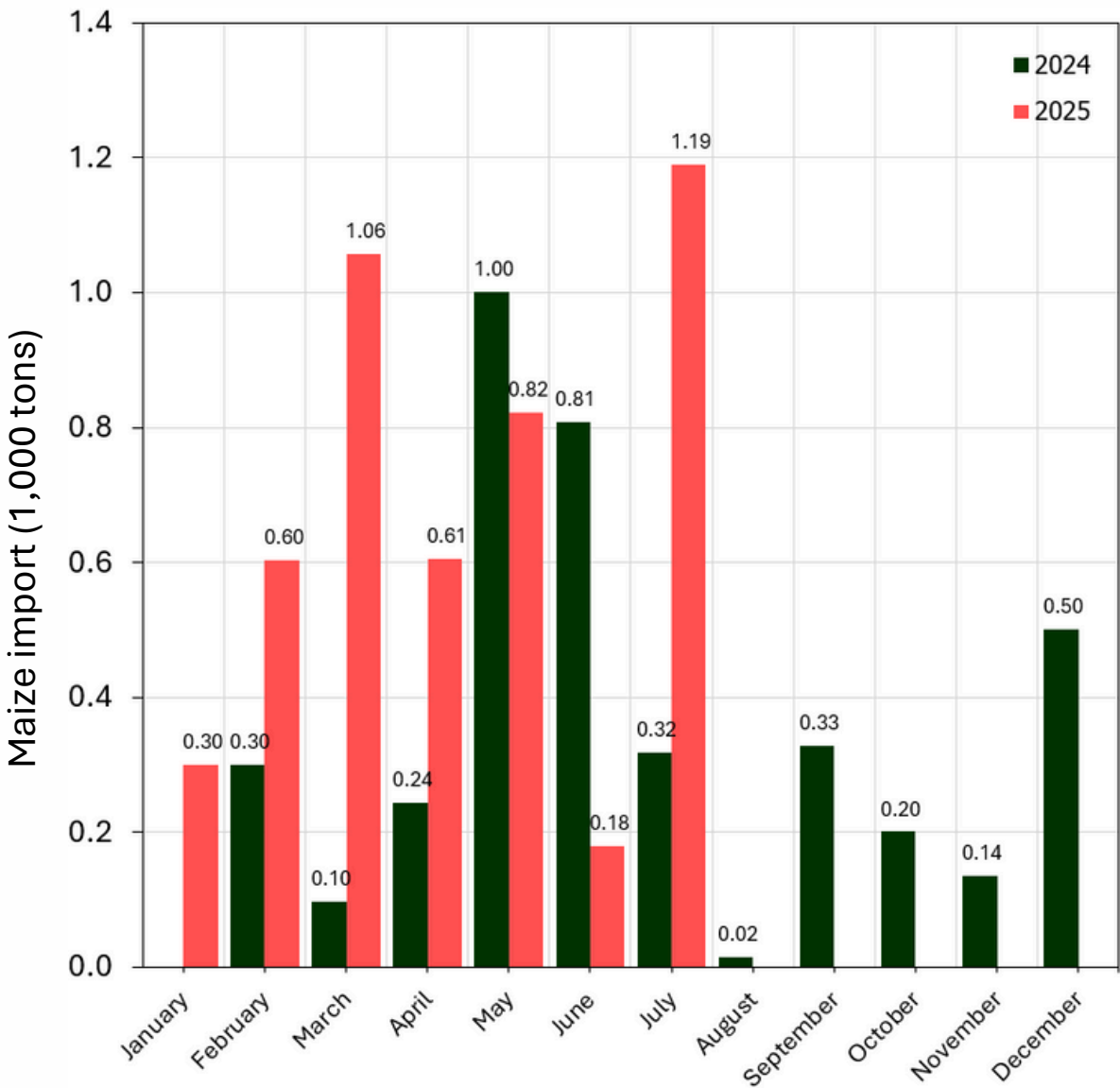


Figure 37: Monthly quantity of maize import from 2024 to 2025

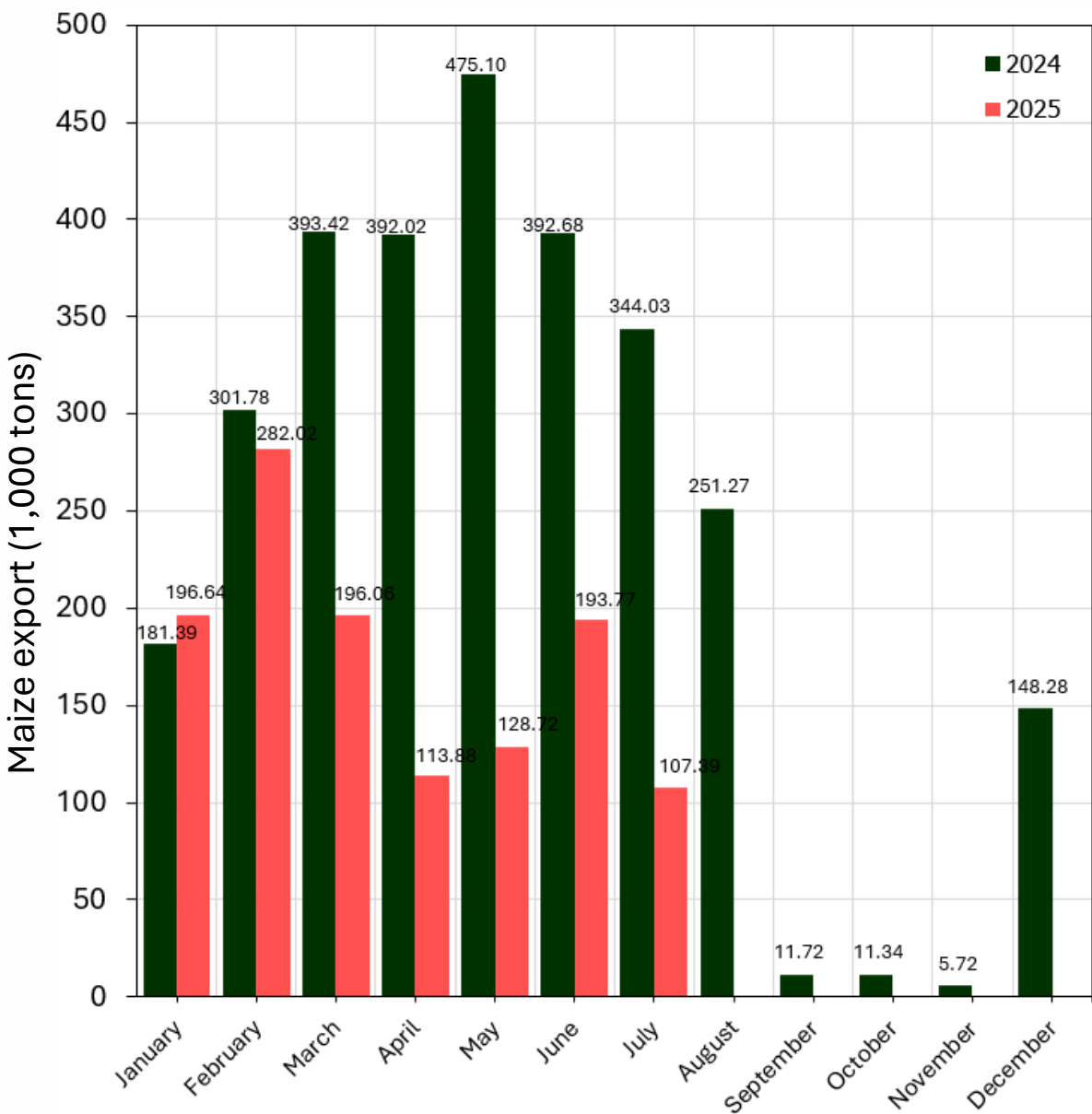


Figure 38: Monthly quantity of maize export from 2024 to 2025

For sugarcane crops in crop year 2024/2025, both planted area and production are expected to decrease. The harvest period covered from October 2024 to March 2025. Regarding sugar trade, no imports were reported in 2024. Only small export volumes were recorded, with imports ranging between 5,895 and 6,720 tons in 2024, and a small export volume of 1,830 tons in April 2025 (Figure 39).

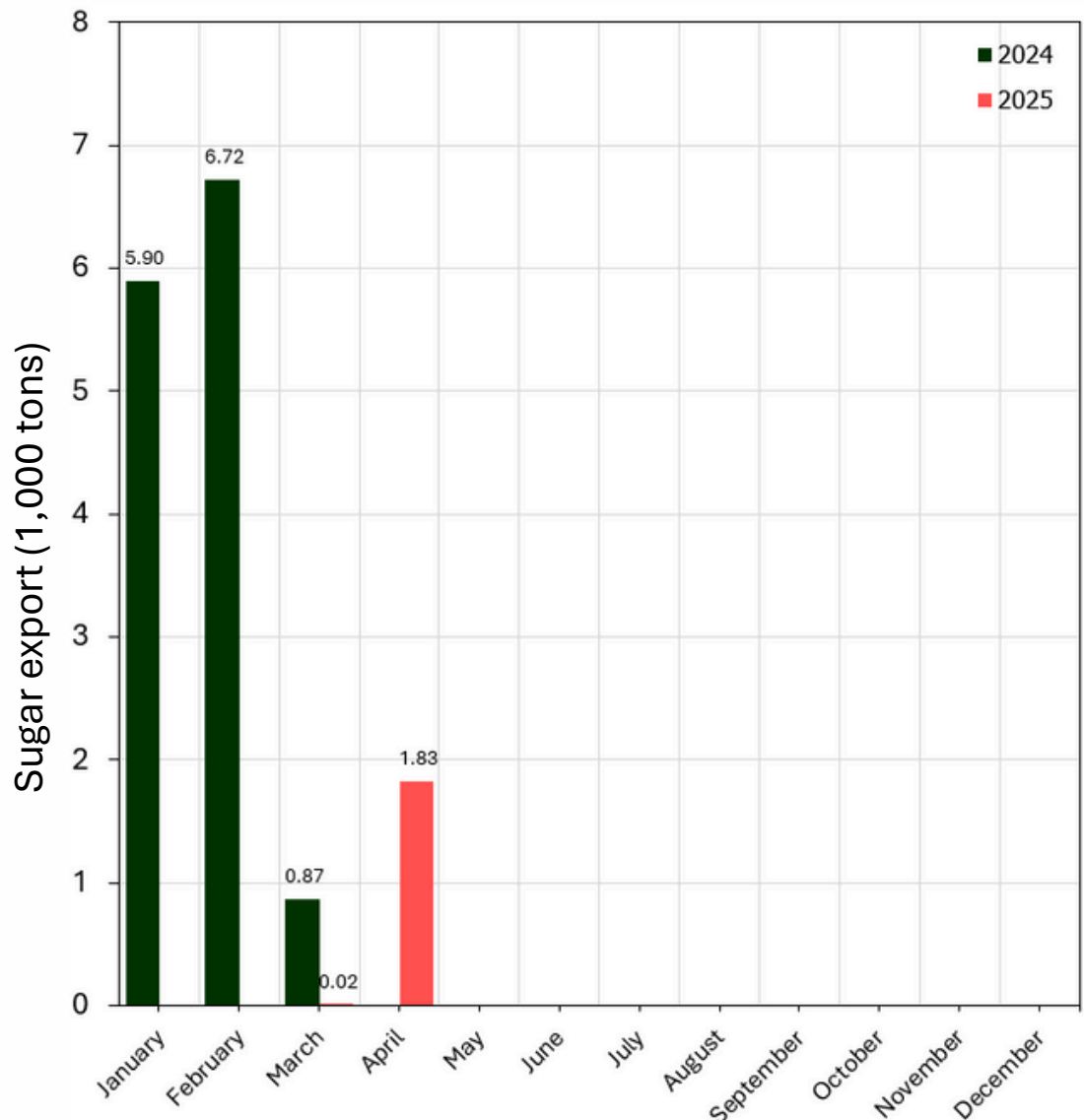


Figure 39: Monthly quantity of sugar export from 2024 to 2025

For soybean crops in crop year 2024/2025, both soybean planted area and production are expected to increase. The wet season harvest covers from August 2024 to December 2025, while the dry season harvest covered December 2024 to May 2025. Regarding soybean trade, import volumes were limited in 2025, with 245 tons in April and 122 tons in June (Figure 40). Exports remained minimal in both 2024 and 2025, with only small quantities recorded (Figure 41).

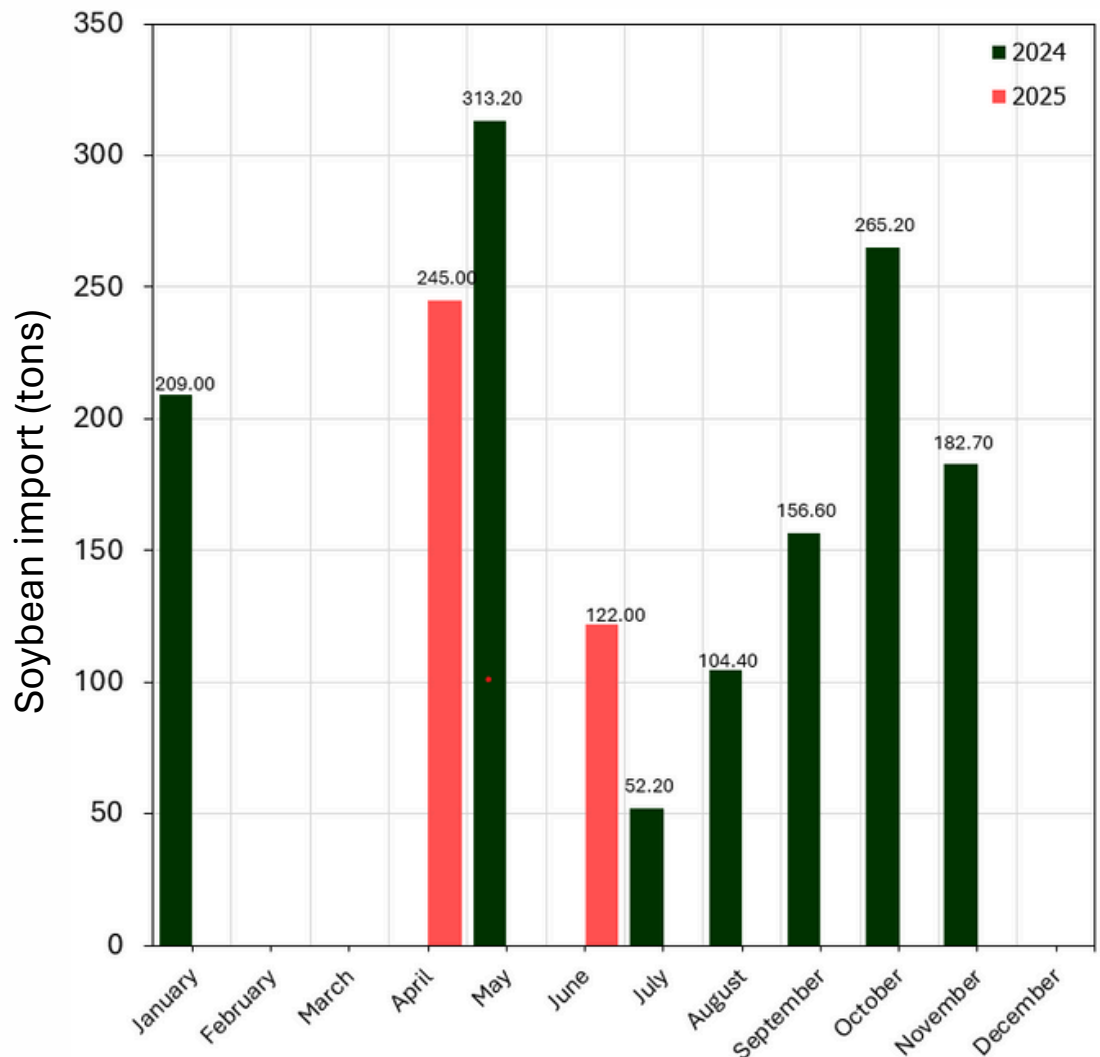


Figure 40: Monthly quantity of soybean import from 2024 to 2025

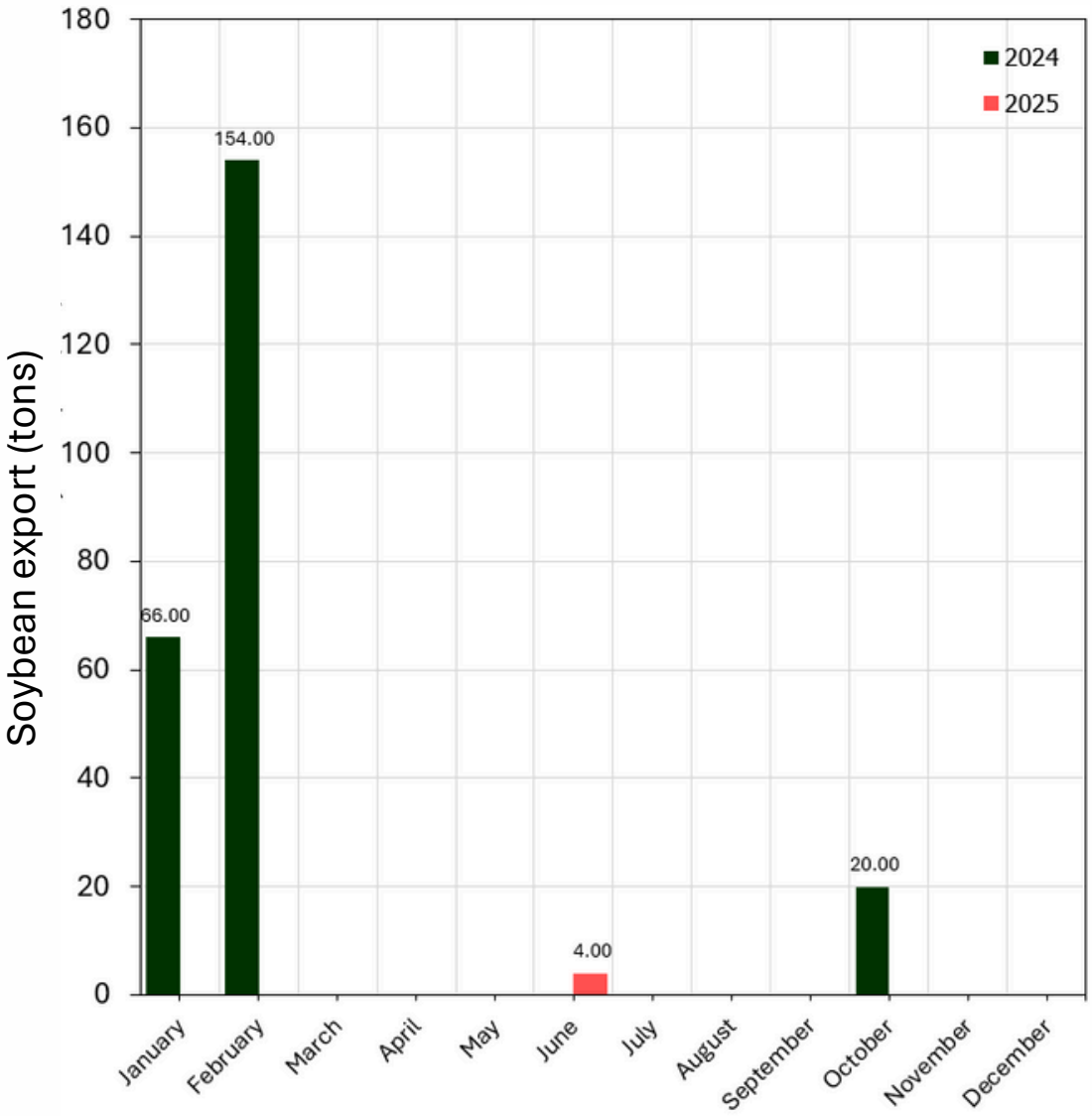


Figure 41: Monthly quantity of soybean export from 2024 to 2025

For cassava crops in crop year 2024/2025, both planted area and production are expected to increase. The harvest period covered from September 2024 toward March 2025. Regarding cassava trade, imports were minimal around 70 tons in January 2024 but increased sharply to 8,870 tons in April 2025 (Figure 42). However, exports were slightly higher in 2024 compared to 2025 during the first half of the year. In 2025, cassava exports are expected to remain stable at approximately 1.7 thousand tons through the second half of the year (Figure 43).

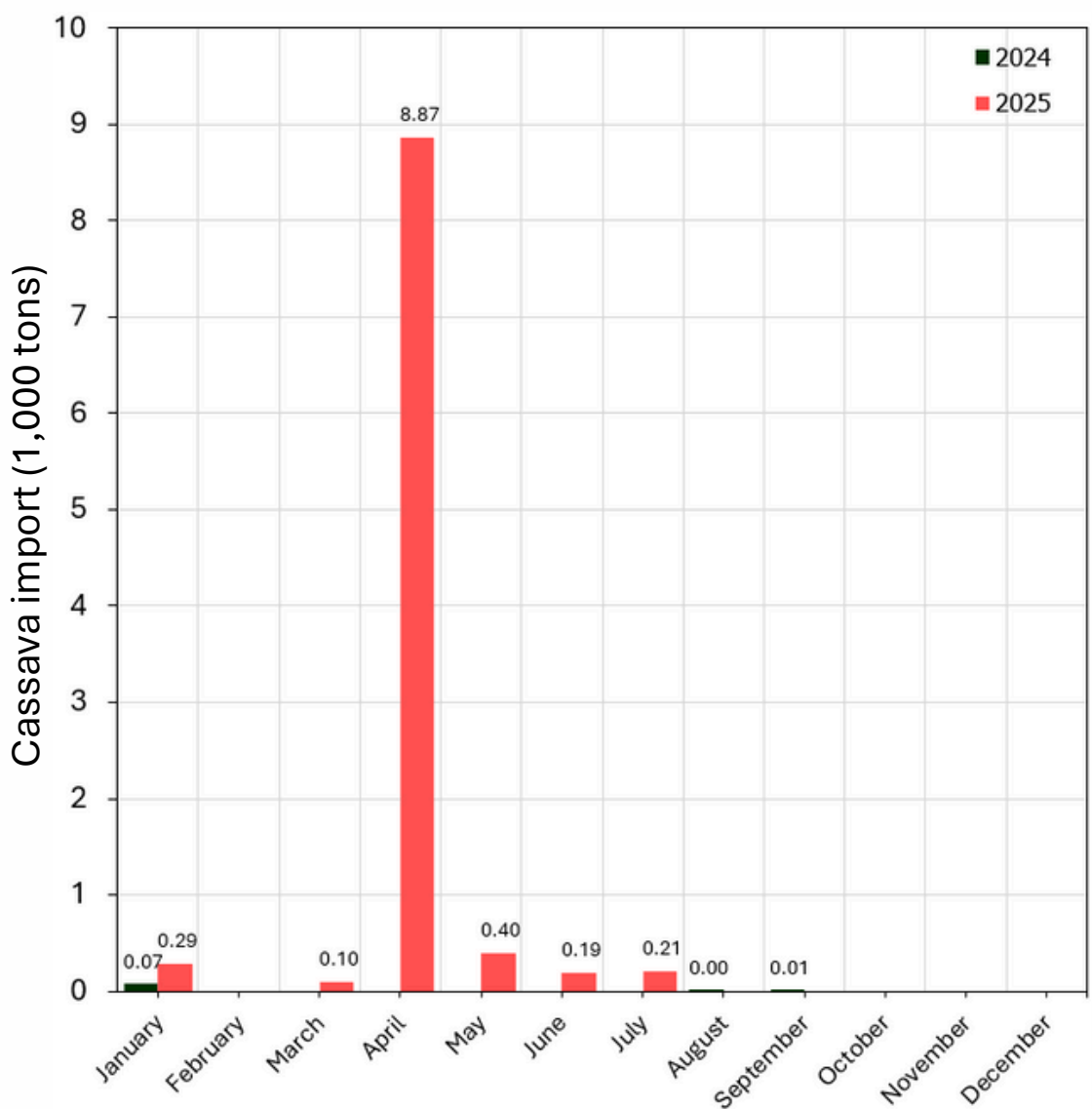


Figure 42: Monthly quantity of cassava import from 2024 to 2025. Note for a small export volume of cassava in August 2024 is 0.01 tons.

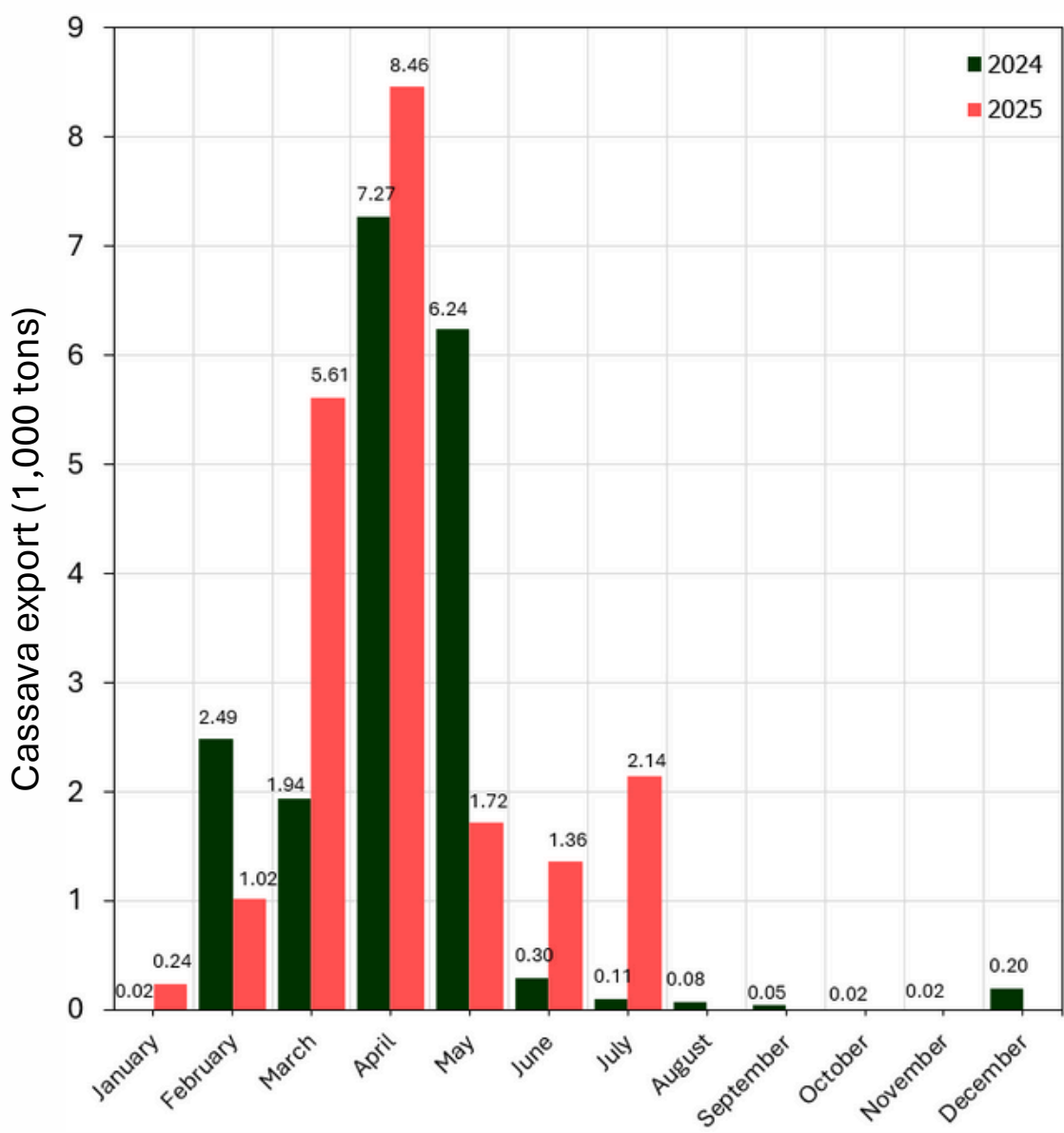


Figure 43: Monthly quantity of cassava export from 2024 to 2025

Crop Situation of Philippines in Crop Year 2024/2025



Philippines situation in crop year 2024/2025

The information on weather conditions, climate change, global warming, and natural disasters is not yet available. Additionally, crops are affected by weather and natural disasters for the crop year 2024/2025 have not been reported yet.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, data on the planted area is not available. However, production is expected to increase, driven by favorable weather conditions, the use of high-quality rice varieties, and greater fertilizer application. The wet season harvest extends from July to December 2024, while the dry season harvest covers January to June 2025. Regarding rice trade, import volumes fluctuated throughout 2024, with a notable increase in the second half, reaching approximately 609,840 tons in August 2024. In 2025, imports of rice products also showed a slight increase compared with the same period (Figure 44). Exports were limited in 2024 but still recorded a significant volume of 138,960 tons in May (Figure 45).

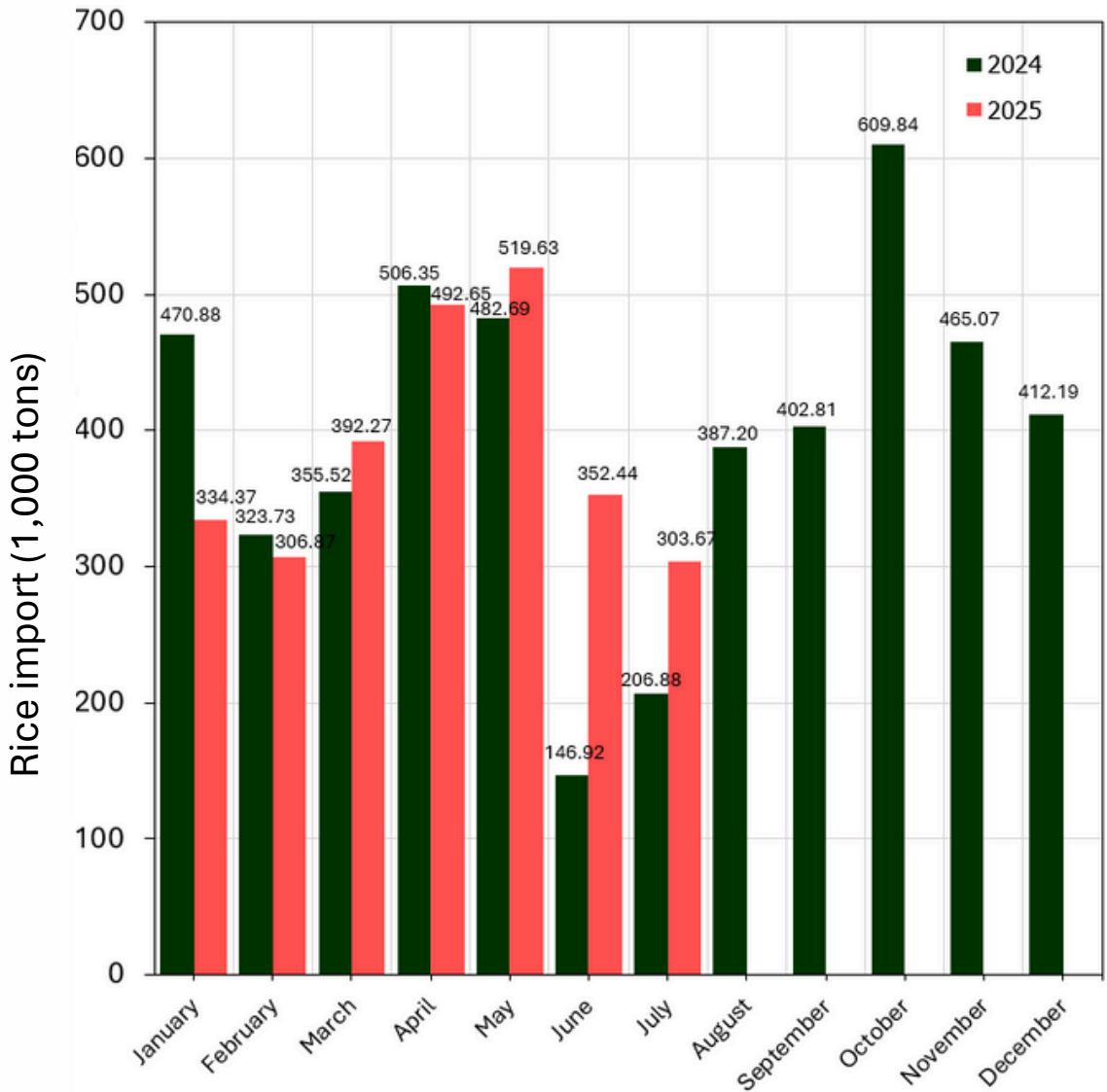


Figure 44: Monthly quantity of rice import from 2024 to 2025

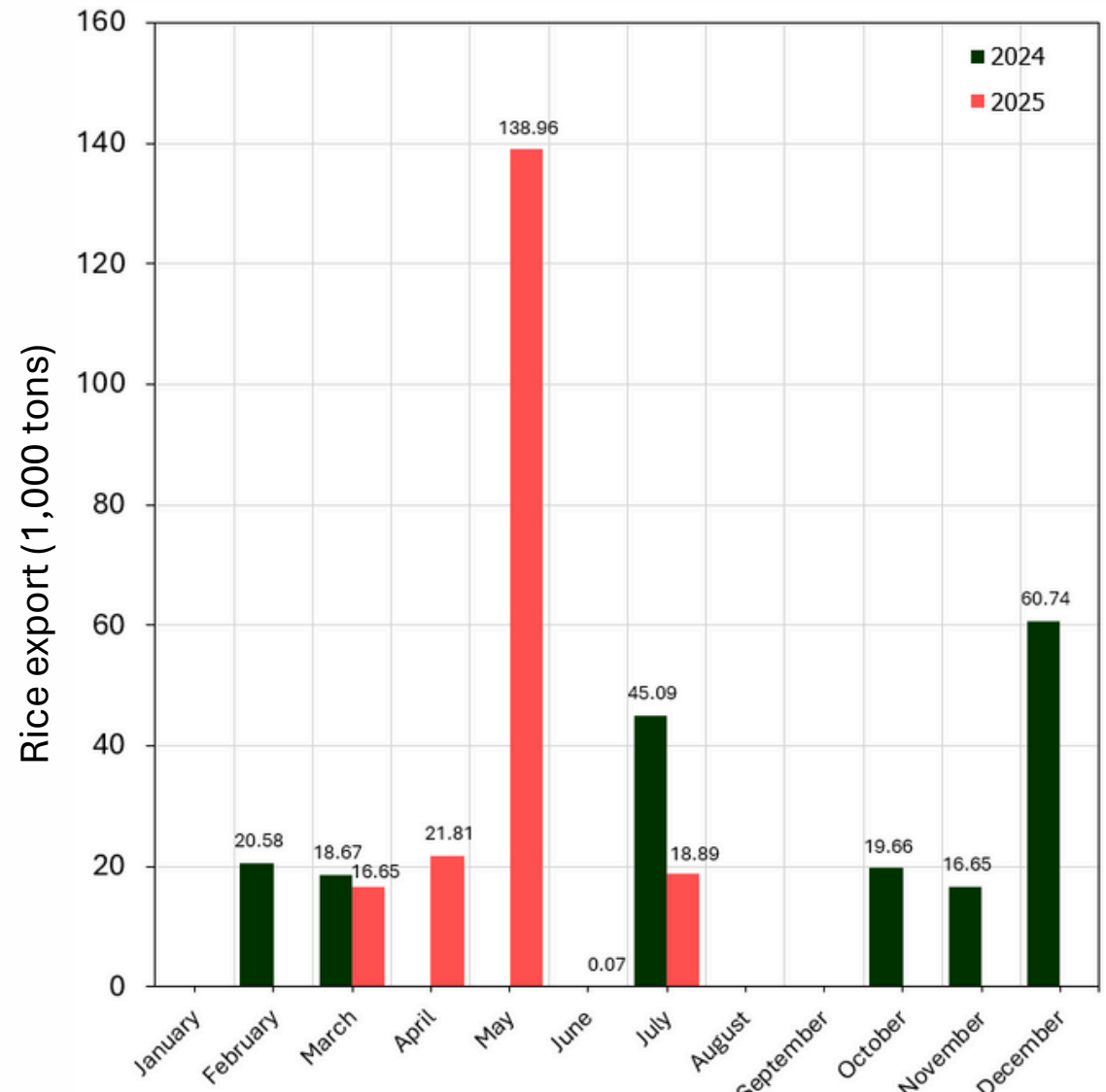


Figure 45: Monthly quantity of rice export from 2024 to 2025

For maize crops in crop year 2024/2025, data on the planted area is not available. The production is expected to increase, which is driven by favorable weather conditions, the use of high-quality of rice varieties, and more application of fertilizer. The harvest period for the wet season started from July to December 2024, while the dry season covered from January through June 2025. Regarding maize trade, import volumes were highest in the second half of 2024, peaking at approximately 261,120 tons in May and 248,880 tons in November. In contrast, imports in 2025 showed only one notable peak at 181,760 tons in January, followed by a sharp decline (Figure 46). Exports were strong during the first half of 2024, but declined in the latter half. In 2025, export volumes decreased further when compared with the same period in 2024 (Figure 47).

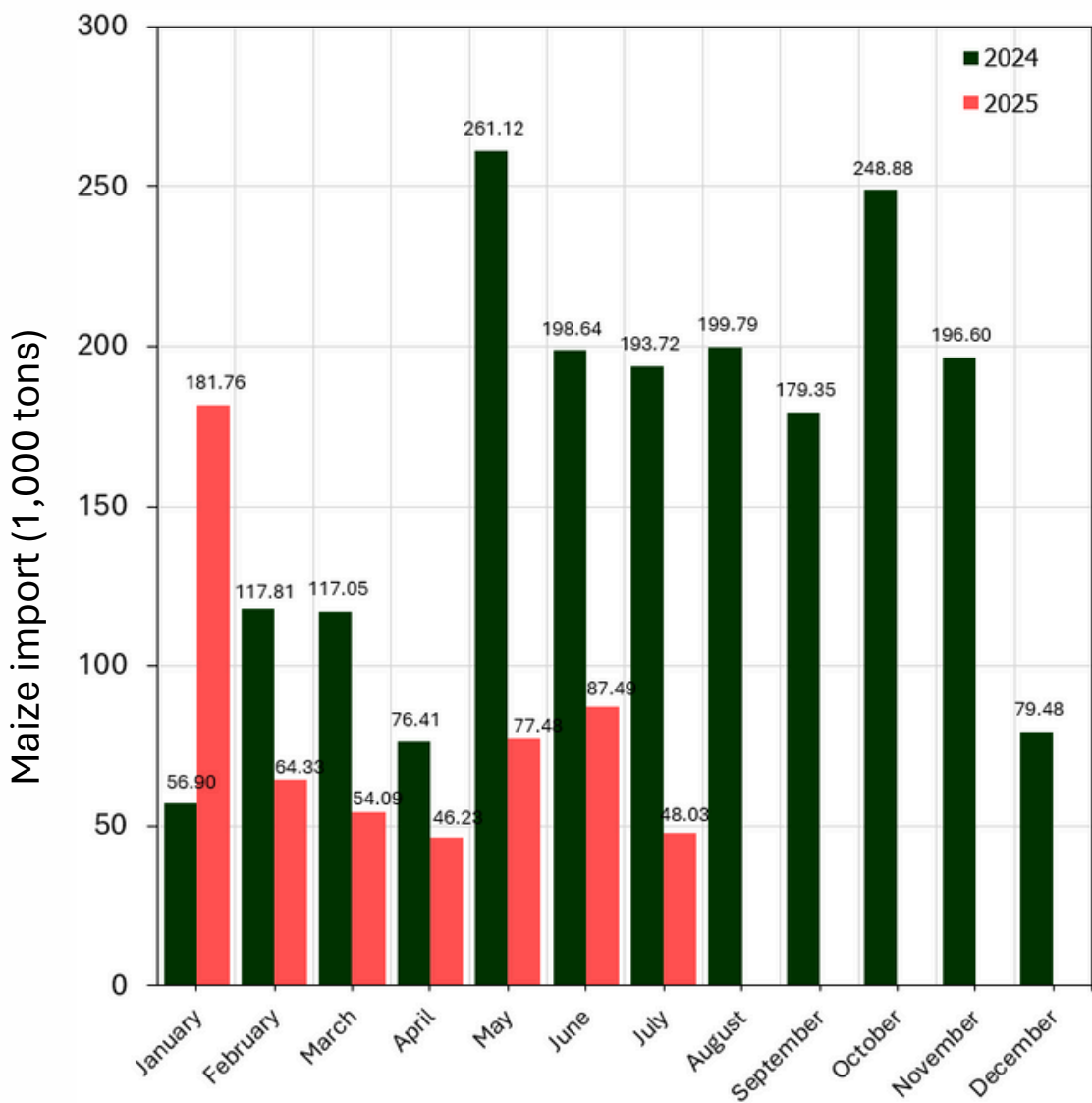


Figure 46: Monthly quantity of maize import from 2024 to 2025

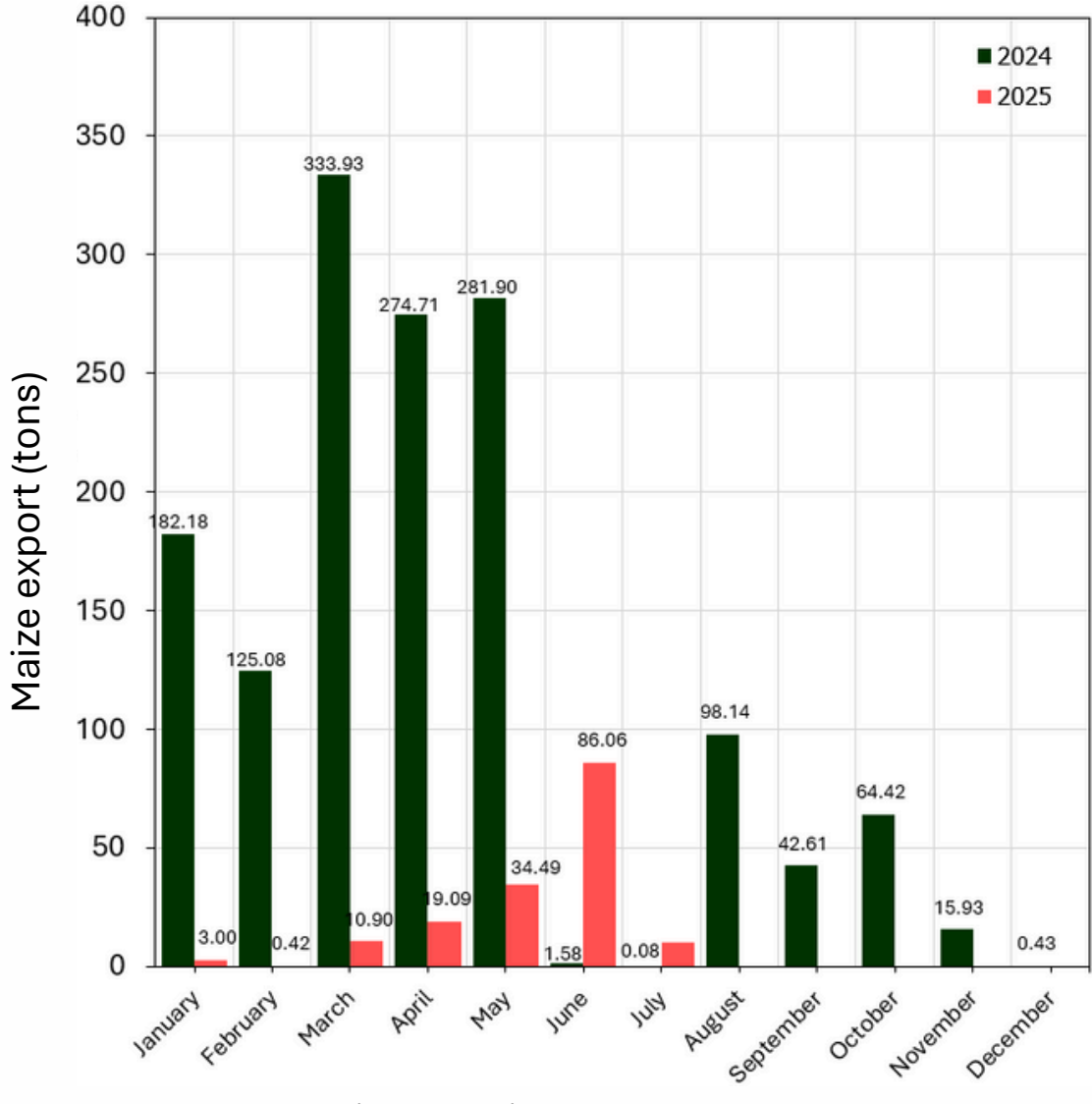


Figure 47: Monthly quantity of maize export from 2024 to 2025

For sugarcane crops in crop year 2024/2025, data on the planted area and production are not available. The harvest period covered from September 2024 through August 2025. Regarding sugar trade, imports are forecast to decrease. In 2024, the total refined sugar imports amounted to 228,666.37 tons, while the import volume as of August 2025 was lower compared with the full-year total in 2024. On June 28, 2025, the government issued Sugar Order No. 8 (the 1st Import Program for crop year 2024/2025), allowing the importation of 424,000 tons of refined sugar, expected to arrive by November 30, 2025 (Figure 48). Meanwhile, exports increased in 2025 due to higher raw sugar production. The volume allocation under Sugar Order No. 5 (S. 2024/2025) was 66,000 tons, compared to 25,300 tons under Sugar Order No. 3 (S. 2023/2024) (Figure 49).

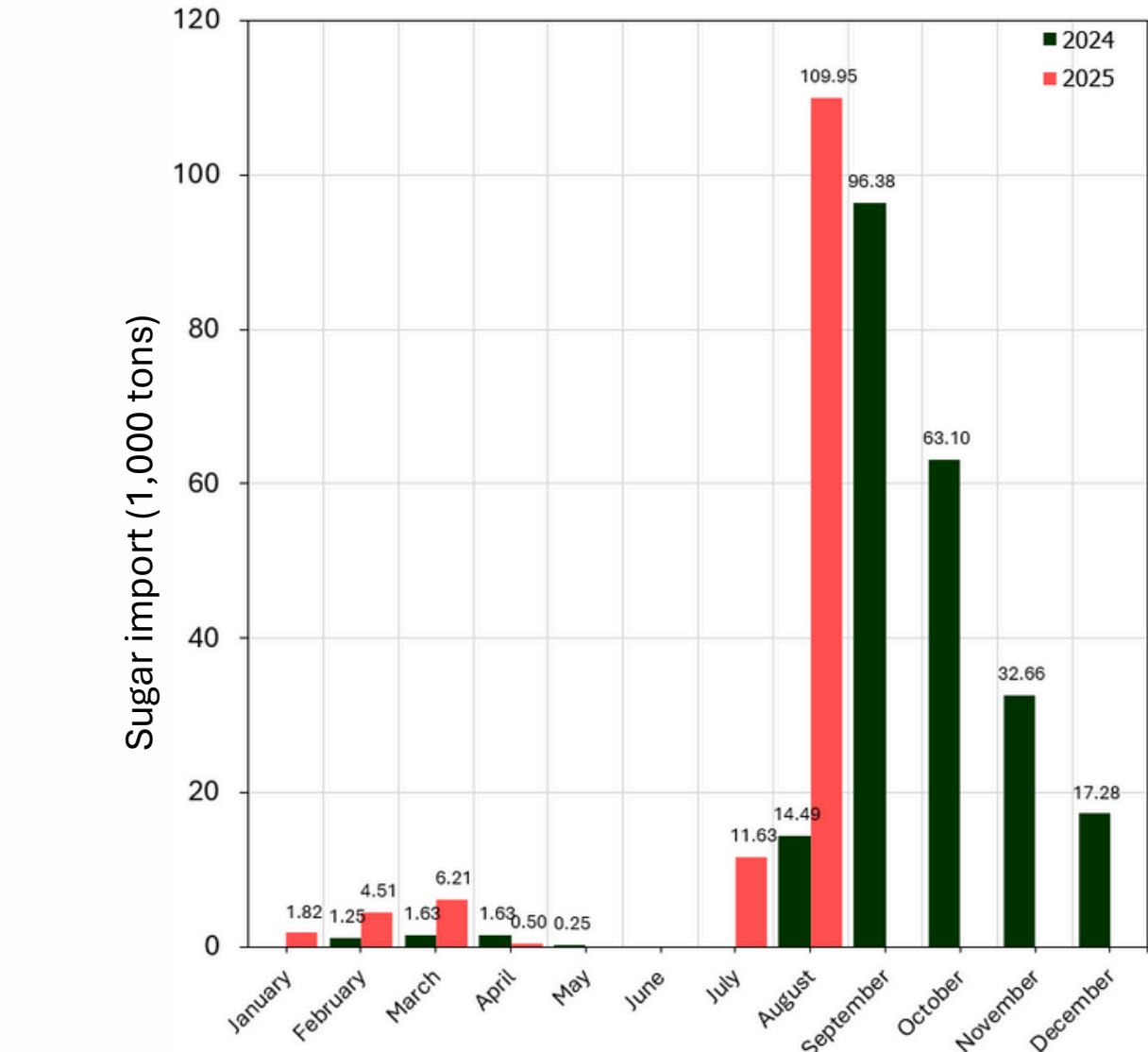


Figure 48: Monthly quantity of maize import from 2024 to 2025

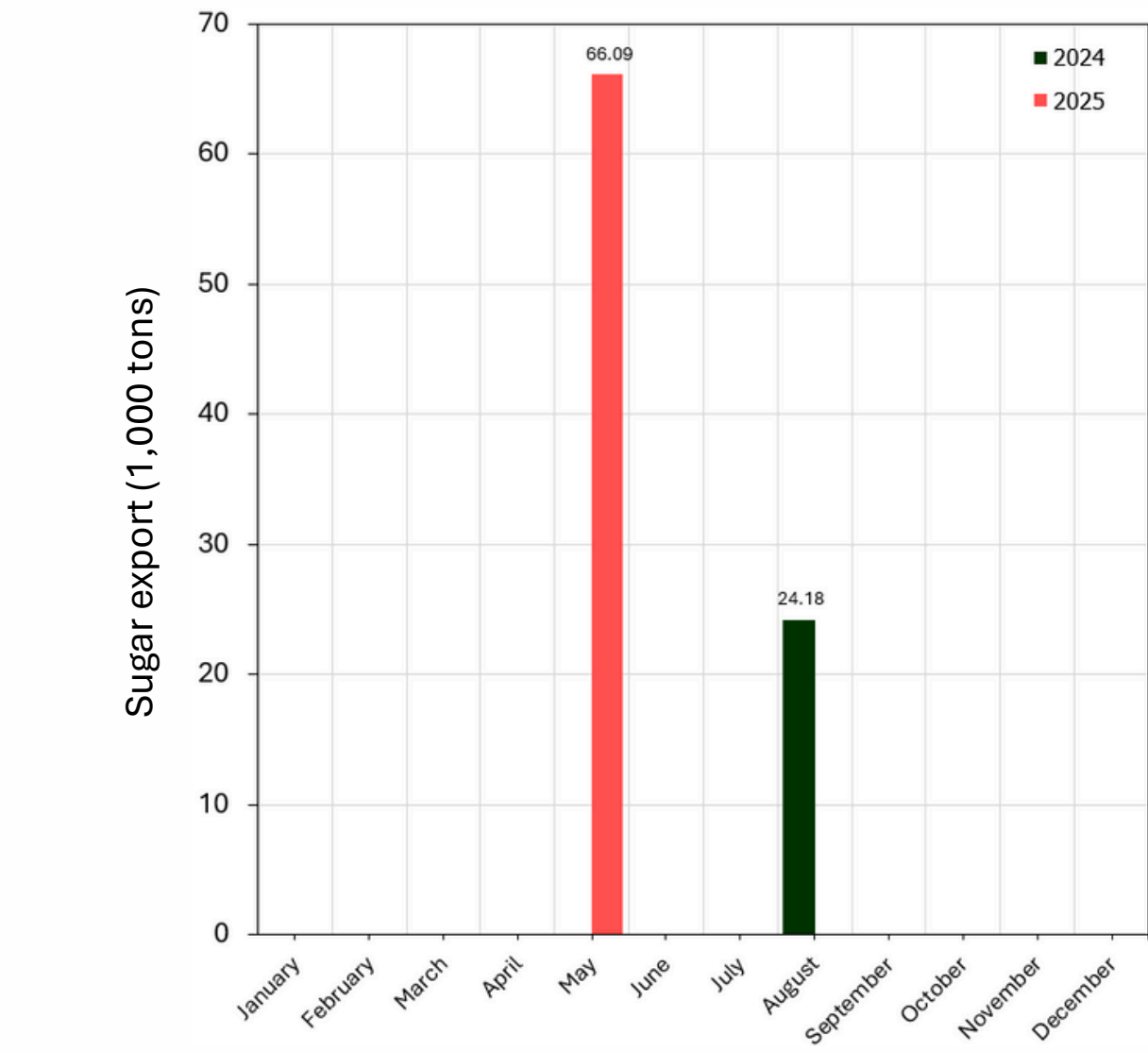


Figure 49: Monthly quantity of maize export from 2024 to 2025

For soybean crops in crop year 2024/2025, data on the planted area and production are not available. The harvest period for the wet season covered from July to December 2024, while the dry season covered from January to June 2025. Regarding soybean trade, imports increased around mid-2024, reaching 17,631 tons in May and 18,623 tons in August, before declining toward the end of the year. In early 2025, import volumes again showed an upward trend (Figure 50). No soybean exports have been reported during the period.

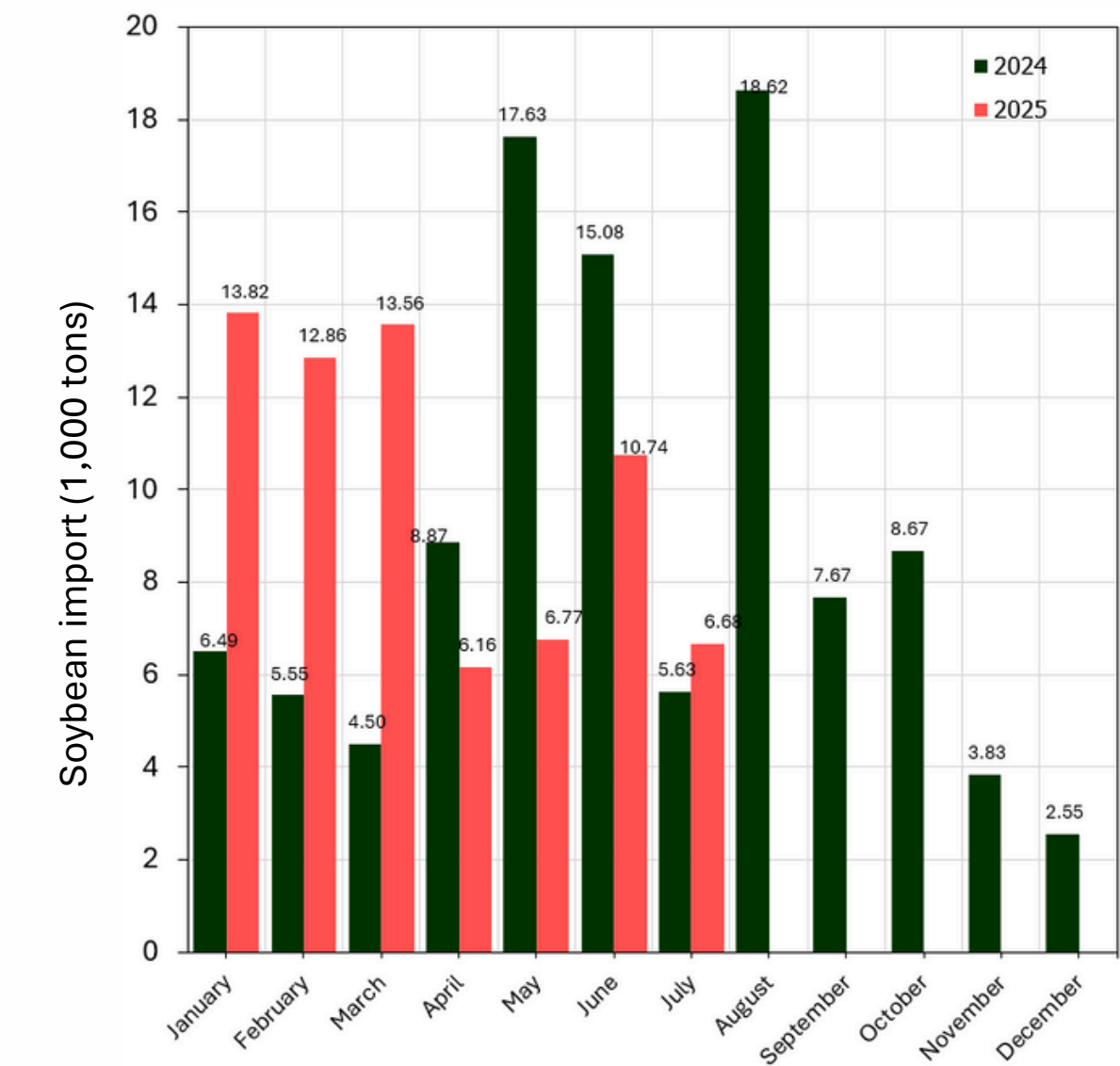


Figure 50: Monthly quantity of soybean import from 2024 to 2025

For cassava crops in crop year 2024/2025, data on the planted area and production are not available. The harvest period for the first cropping season started from July to December 2024, while the second cropping season covered from January to June 2025. Regarding cassava trade, imports declined around mid-2024, then rose again toward the end of the year, reaching approximately 12,750–13,700 tons in November. In 2025, cassava exports peaked at 17,750 tons in June (Figure 51). Overall, exports were higher in 2024, averaging approximately 202,100 tons, compared with approximately 134,920 tons in 2025 (Figure 52).

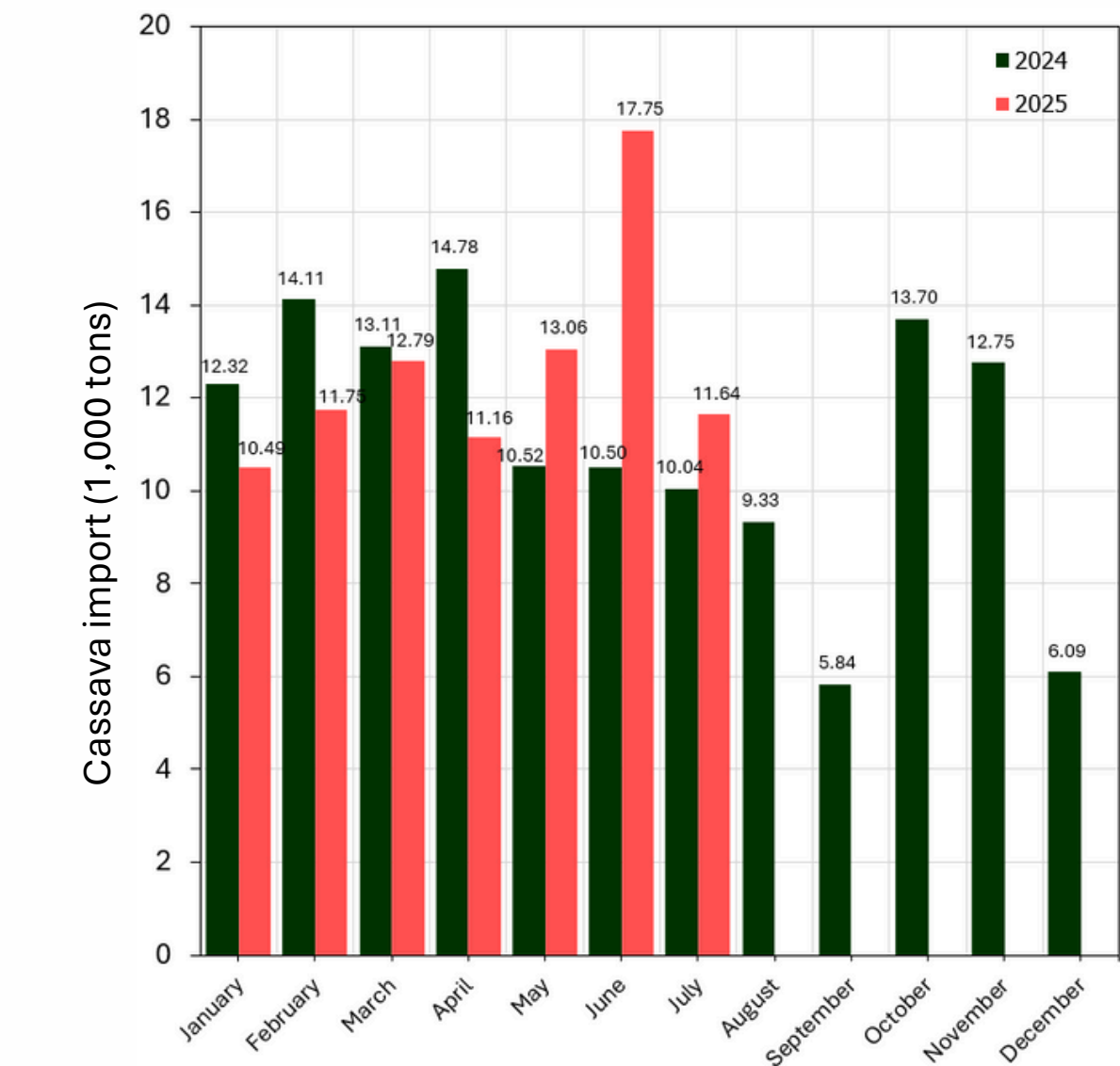


Figure 51: Monthly quantity of cassava import from 2024 to 2025

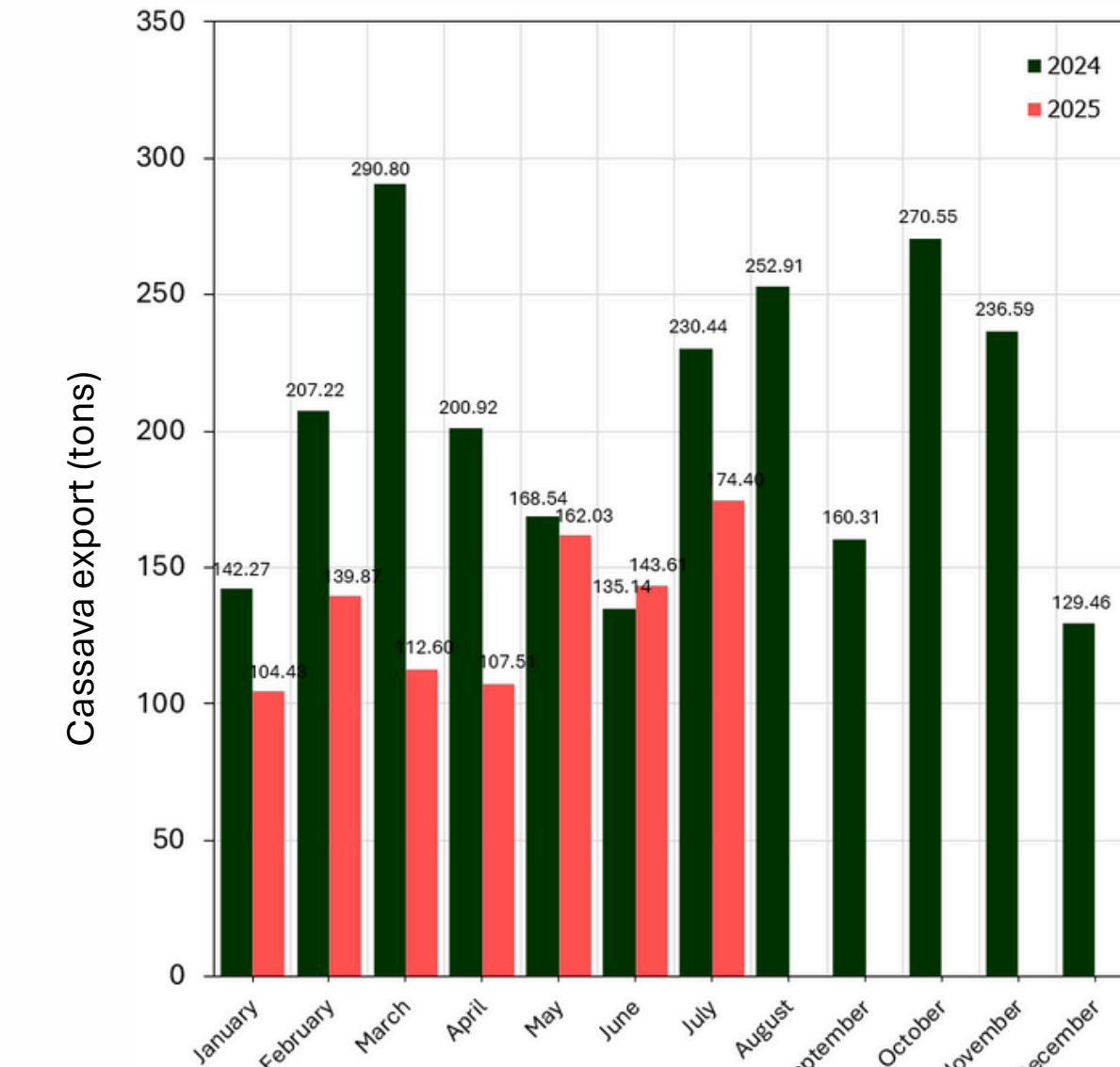


Figure 52: Monthly quantity of cassava export from 2024 to 2025

Crop Situation of Thailand in Crop Year 2024/2025



Thailand situation in crop year 2024/2025

Thailand is expected to experience favorable weather conditions, with sufficient water availability and adequate sunlight to support crop growth. However, the country may also encounter heavy rainfall, with precipitation ranging from 50–100 mm per day. The impacts of climate change and global warming are evident, as extreme drought conditions (El Niño) alternate with heavy rainfall (La Niña) throughout the year. Several natural disasters have been recorded, including floods in the northern, northeastern, and central regions, as well as disease outbreaks and pest infestations, particularly affecting the same regions.

Damage reports indicate that five major commodities have been affected. Approximately 6,000 hectares of rice crops were damaged, with about 50 percent of the losses attributed to climate change or global warming. For maize crops, around 540 hectares were damaged mainly by pest infestations such as the fall armyworm, while an additional 3,800 hectares of sugarcane were affected, with around 10 percent of the damage attributed to climate change. No significant damage was reported for soybean and cassava crops.

In response, the government and farmers have strengthened collaboration to protect and manage crop production. Farmers have adapted by adjusting cultivation plans and planting schedules to align with shifting weather patterns. Nevertheless, some farmers continue to face adverse impacts from the ongoing effects of climate change.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area of rice in Thailand is expected to decrease due to the rising prices of competing crops and declining rice prices. However, rice production is expected to increase, supported by favorable weather conditions. The harvest period for the wet season extends from July 2025 to May 2026, while the dry season runs from February to October 2025. Regarding rice trade, imports fluctuated throughout 2024, while higher import volumes were observed in 2025, peaking at approximately 3,100 tons (Figure 53). Conversely, rice exports are expected to decline (Figure 54), influenced by strong competition from India, Pakistan, and Myanmar, as well as the United States’ revised tariff policies, which have reduced Thailand’s rice export share to the United State market.

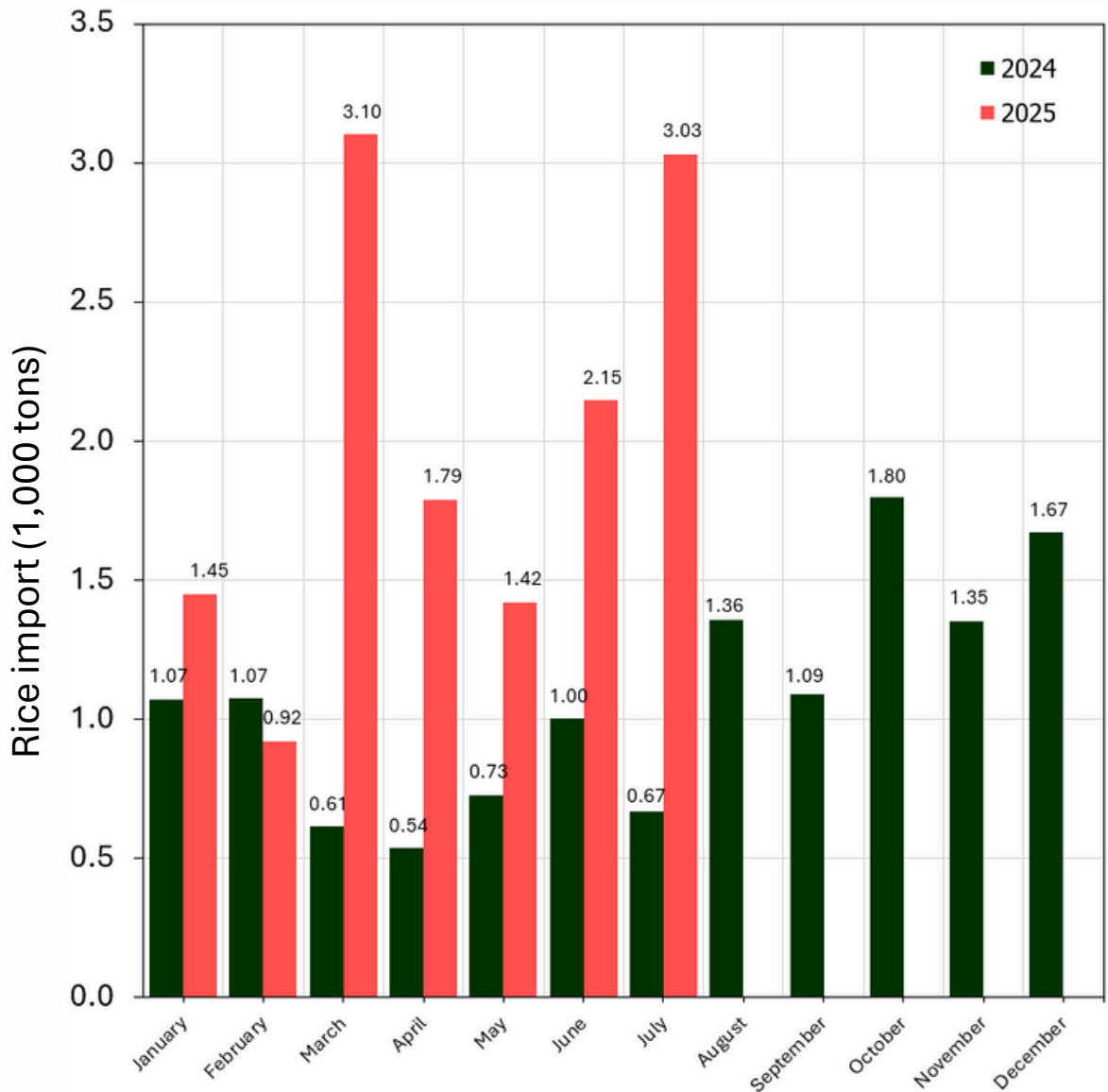


Figure 53: Monthly quantity of rice import from 2024 to 2025

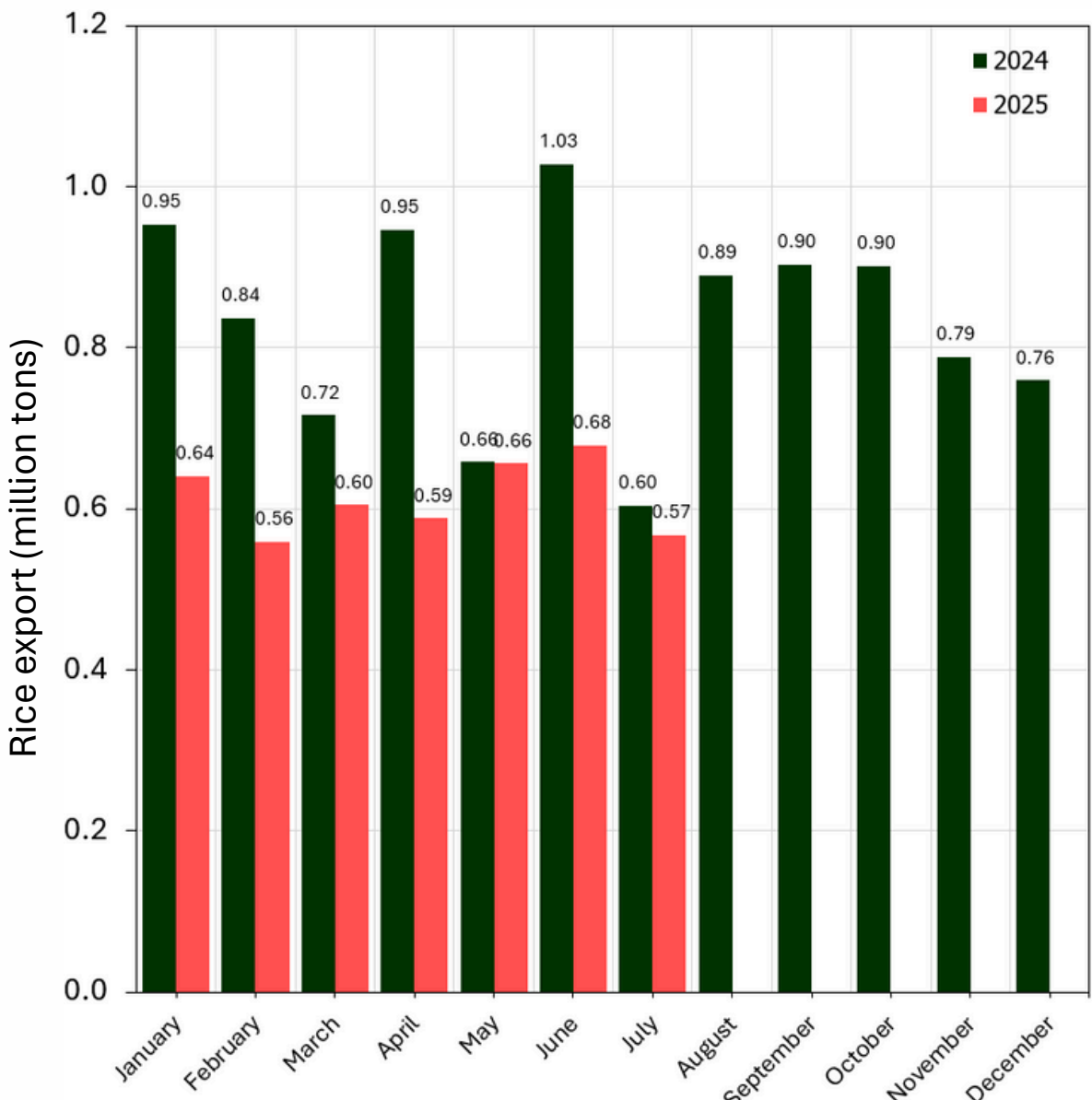


Figure 54: Monthly quantity of rice export from 2024 to 2025

For maize crops in crop year 2024/2025, the planted area of maize is expected to increase as farmers respond to favorable weather conditions, characterized by sufficient rainfall, and to the declining prices of competing crops. Production data are not yet available. The harvest period for the wet season extends from June 2025 to January 2026, while the dry season spans from February to May 2025. Regarding maize trade, imports are expected to decrease (Figure 55). Previously, Thailand had imported maize products from Myanmar under government policies. However, due to a decline in Myanmar’s domestic production, Thailand has reduced imports from that country. No export data have been reported yet.

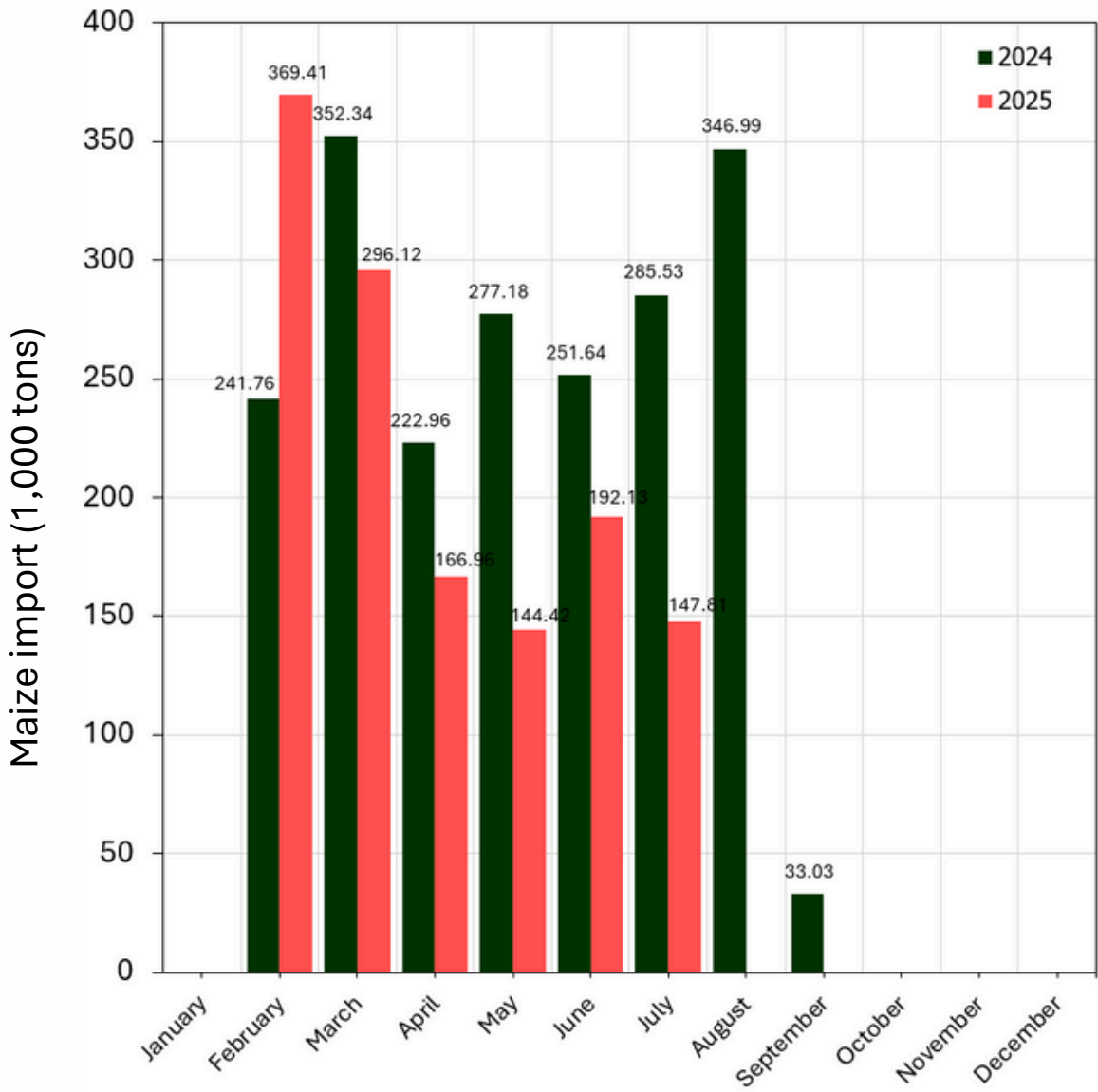


Figure 55: Monthly quantity of maize import from 2024 to 2025

For sugarcane crops in crop year 2024/2025, both the planted area and production of sugarcane are expected to increase due to rising sugar prices, favorable weather conditions, and supportive government policies. The government has approved budgetary support to encourage farmers to harvest fresh, unburnt sugarcane, helping to reduce PM2.5 air pollution during the 2025 production season. Favorable weather and improved farm management practices have also contributed to higher production levels. The harvest period is planned from December 2025 to April 2026. In terms of sugar trade, imports are forecast to decrease, as the government has implemented consumer protection measures to safeguard the domestic sugar industry and ensure adequate sugar supply for both domestic use and export (Figure 56). Conversely, exports are expected to increase (Figure 57), driven by the expansion of domestic sugar production.

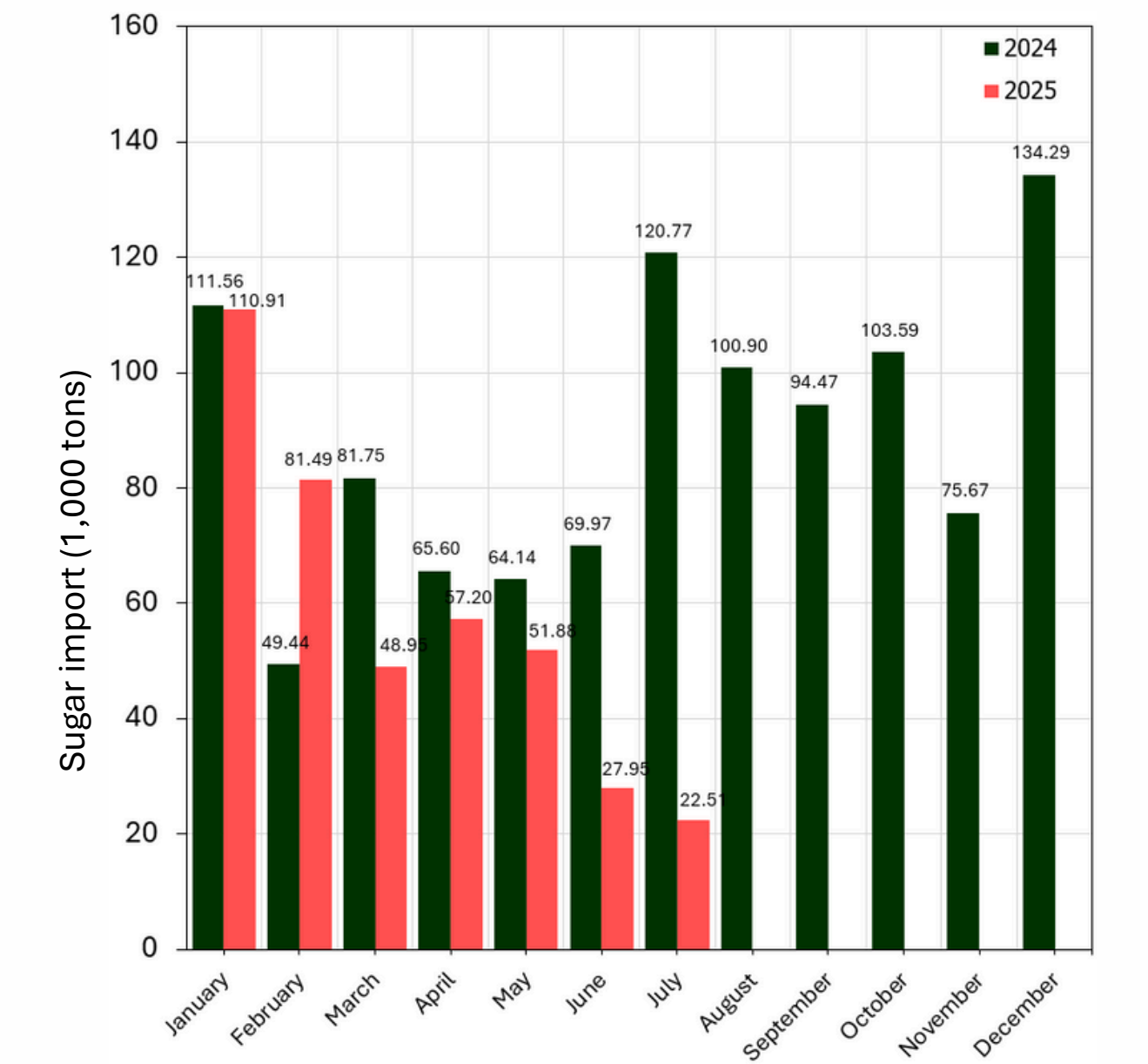


Figure 56: Monthly quantity of sugar import from 2024 to 2025

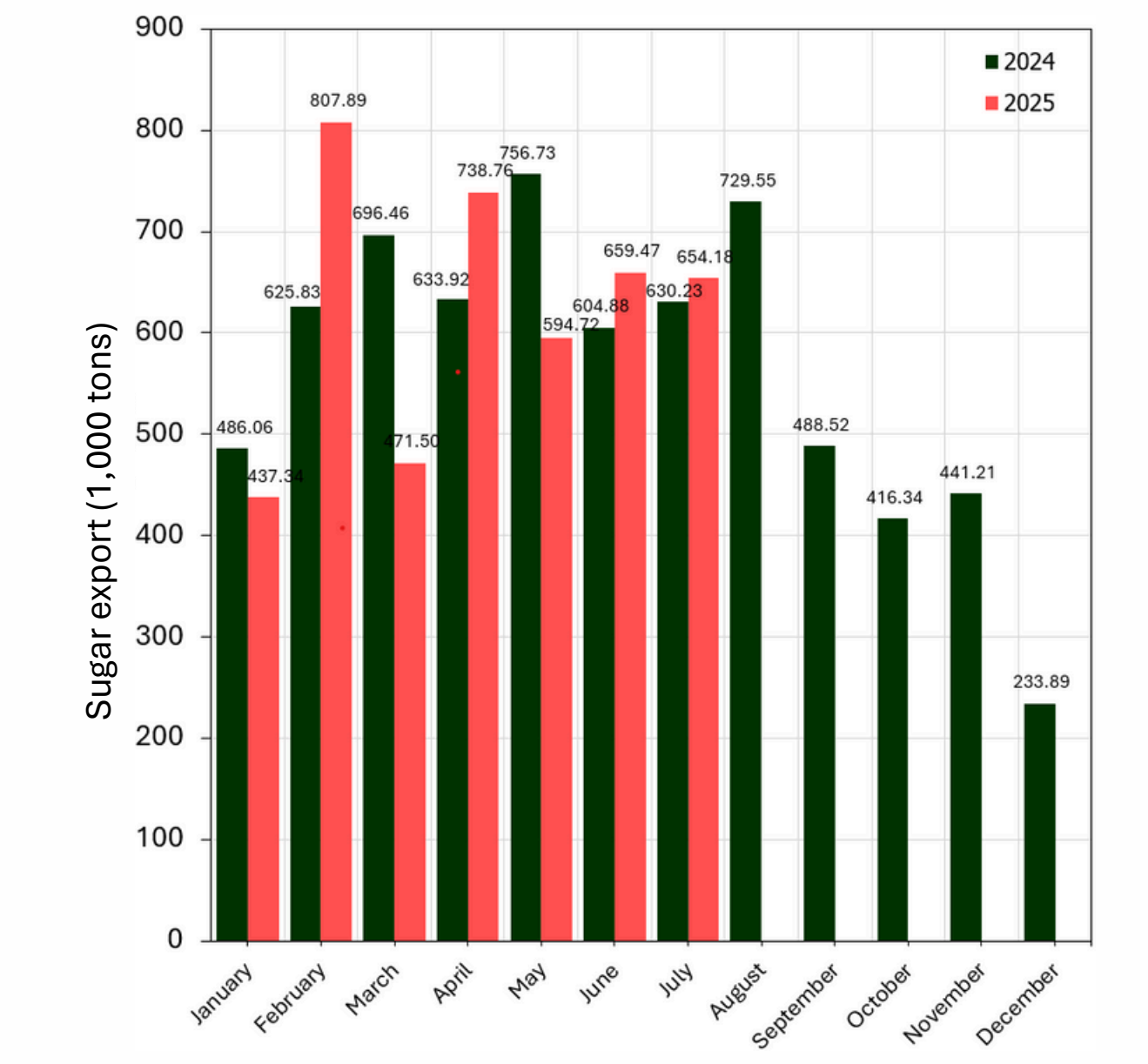


Figure 57: Monthly quantity of sugar export from 2024 2025

For soybean crops in crop year 2024/2025, the planted area of soybeans is expected to decrease due to the intensive management requirements of soybean farming, low yields, labor shortages during harvest, and limited seed stocks. However, production is expected to increase, possibly due to improved productivity or favorable growing conditions. The harvest period for soybeans extends from August to December 2025, while the dry season runs from January to May 2025. Regarding soybean trade, imports are expected to increase (Figure 58), driven by rising domestic demand, particularly from the oil extraction industry and feed sectors, as local production remains insufficient. No export data have been reported.

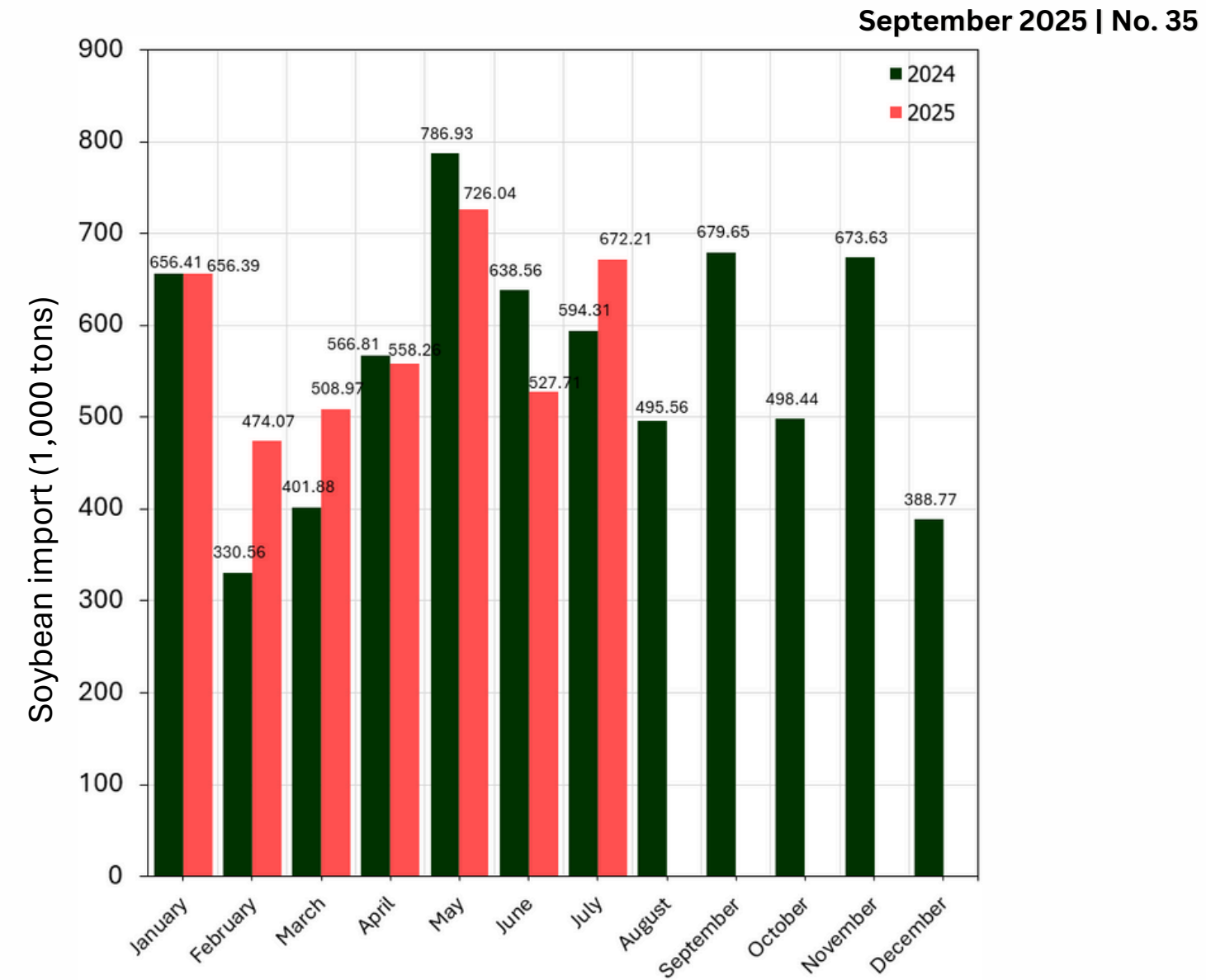


Figure 58: Monthly quantity of soybean import from 2024 to 2025

For cassava crops in crop year 2024/2025, both the planted area and production of cassava are expected to decrease as farmers respond to falling cassava prices. Additionally, pest infestations and disease outbreaks, such as Cassava Mosaic Disease, are expected to further reduce production levels. The harvest period extends from October 2025 to September 2026. Regarding cassava trade, imports are expected to increase (Figure 59), as domestic production may not meet the demand from exporters and processors. Imports of low-cost cassava products from neighboring countries are also expected to support shredded cassava processing industries. Meanwhile, exports are projected to increase (Figure 60), as the Ministry of Commerce continues to promote Thailand’s cassava exports to maintain the country’s global leadership in the cassava industry.

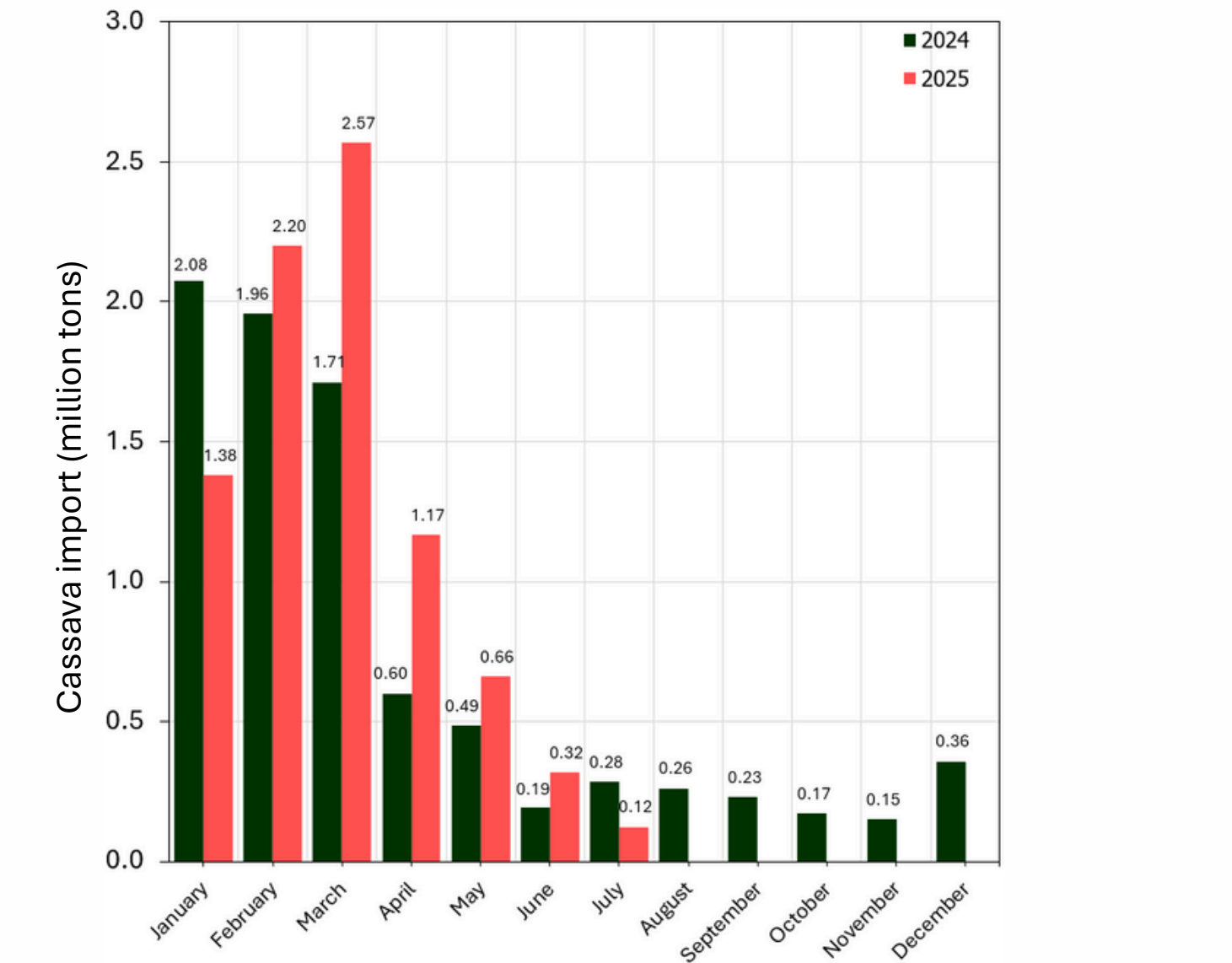


Figure 59: Monthly quantity of cassava import from 2024 to 2025

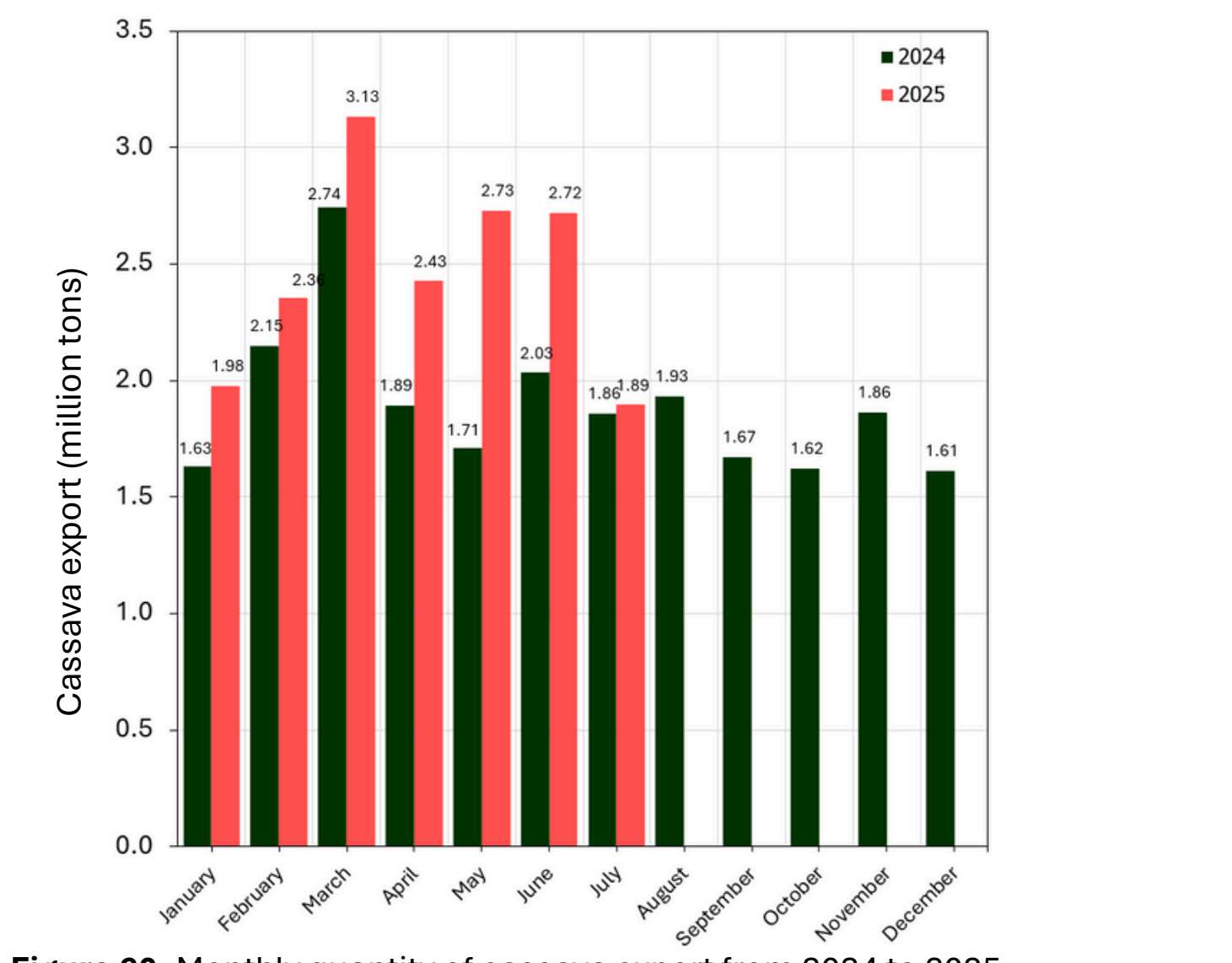


Figure 60: Monthly quantity of cassava export from 2024 to 2025

Crop Situation of Vietnam in Crop Year 2024/2025



Weather Conditions and Climate Change Impact

In the first 8 months of 2025, the weather is relatively unfavorable for agricultural production due to the impact of irregular rainfall, typhoons, floods, and landslides.

Trade of Vietnam’s Agricultural Commodities in 2025

Export value of Vietnam’s agriculture, forestry and fisheries sector is estimated to increase 12 percent compared to the previous year, mainly thanks to higher exports of coffee, rubber, cashew, pepper, fisheries, etc. The main consuming markets of Vietnamese agricultural products are the United States, China, Japan, Philippines, and Korea. Malaysia and Thailand ranked 8th and 12th respectively among the largest export markets of Vietnam's agriculture, forestry and fisheries sector. Import value of Vietnam’s agriculture, forestry and fisheries sector is estimated to increase 12.8 percent compared to the previous year, as a result of increases in imports of cashew, maize, rubber, fruits and vegetables, cotton of all types, etc.

For rice crops, Vietnam’s dry season rice production is expected to increase compared to 2024 due to increased planting area. Wet season rice yields are expected to increase due to sufficient water. Regarding rice trade, rice exports in the first 8 months of 2025 increased by 3.7 percent in volume but decreased by 15.1 percent in value. Vietnam's rice exports in 2025 are expected to increase slightly in volume but decrease in value due to lower export prices (Figures 61–62).

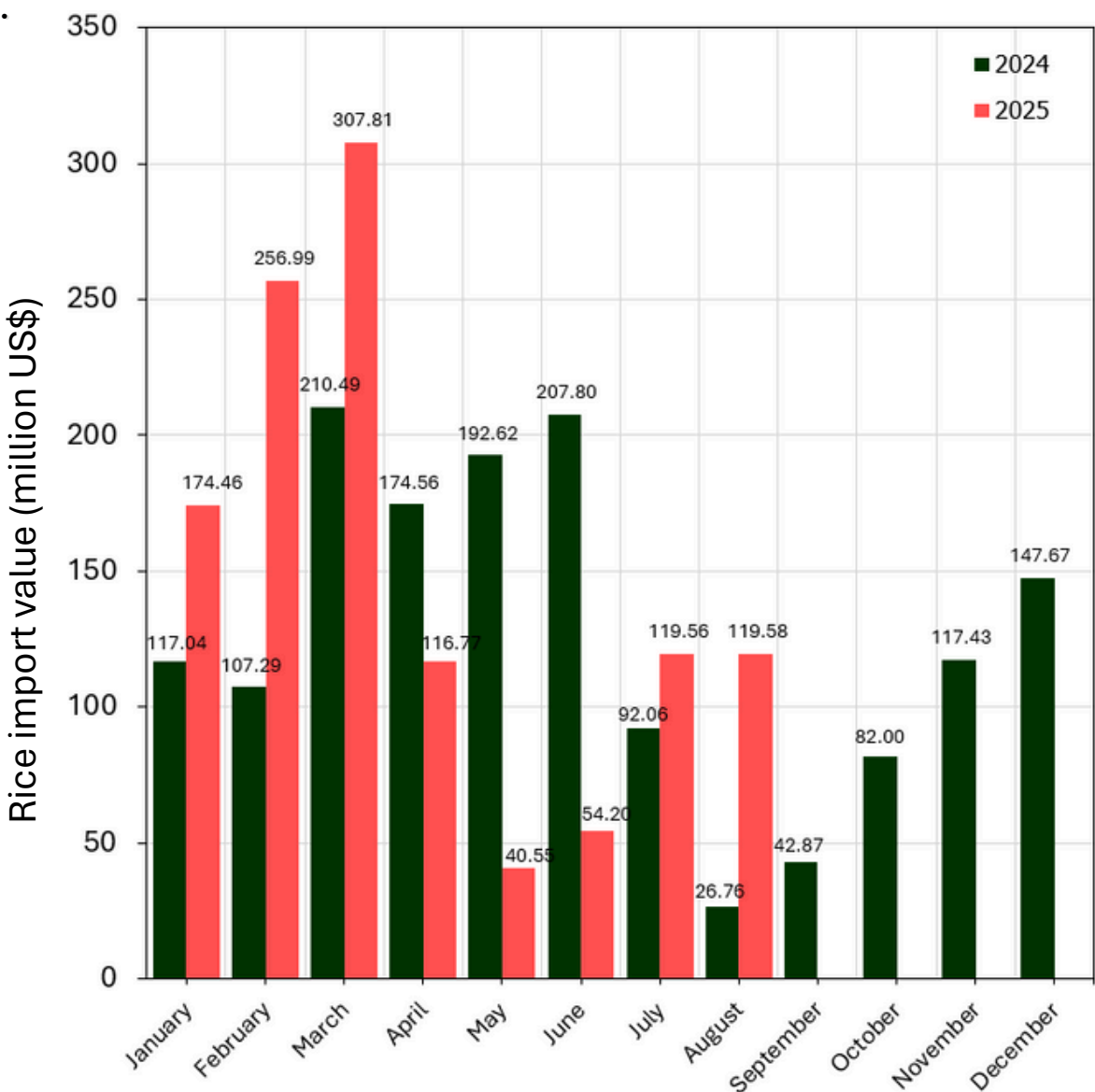


Figure 61: Monthly import value of rice from 2024 to 2025

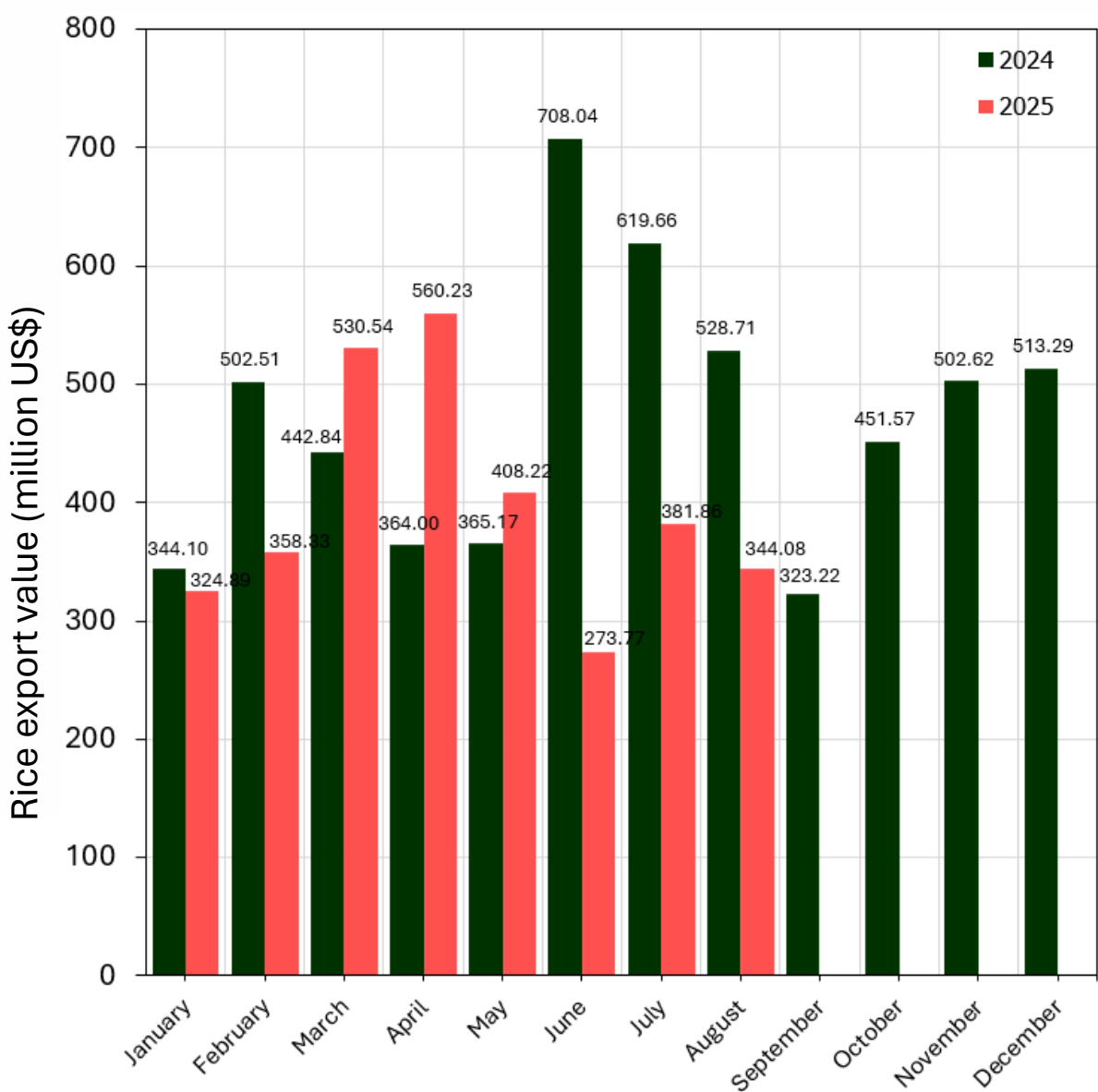


Figure 62: Monthly export value of rice from 2024 to 2025

For maize and soybean crops, the planted areas of maize and soybean in 2025 are estimated to decrease slightly compared to 2024 due to increased production costs. Prices of imported fertilizer in the first 8 months of 2025 increased by 2 percent compared to the same period in 2024. As a result, production costs of some agricultural commodities, including maize and soybeans, increased. Imports of corn in the first 8 months of 2024 decreased in volume but increased in value. In particular, the import volume of maize was 6.75 million tons, down 2.6 percent; the import value reached 1.73 billion US\$, up 0.8 percent. On the other hand, soybean imports increased both volume and value, with volume being 1.8 million tons, up 25.3 percent, and import value was 837.6 million US\$, up 11.1 percent (Figures 63–66).

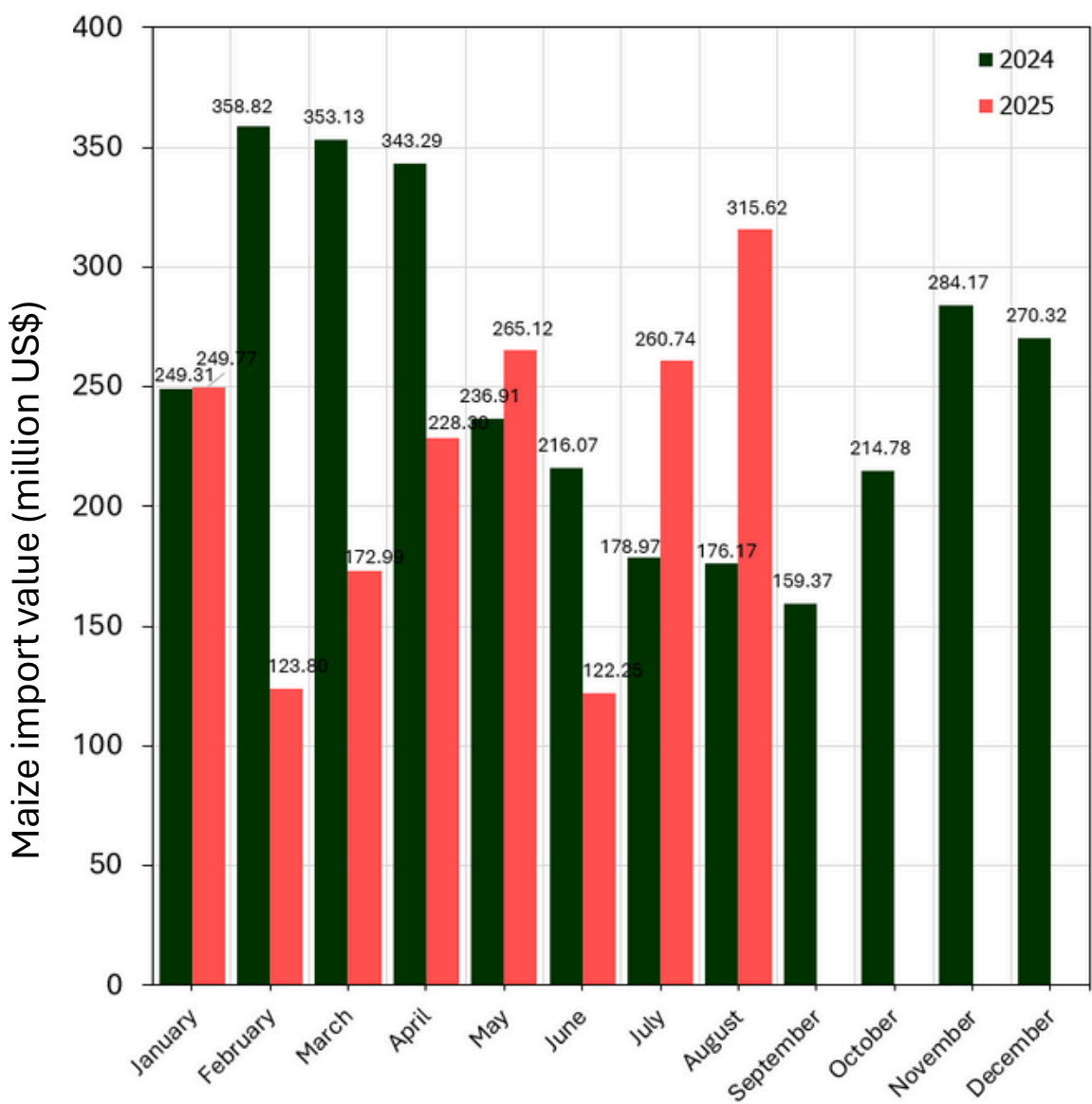


Figure 63: Monthly import value of maize from 2024 to 2025

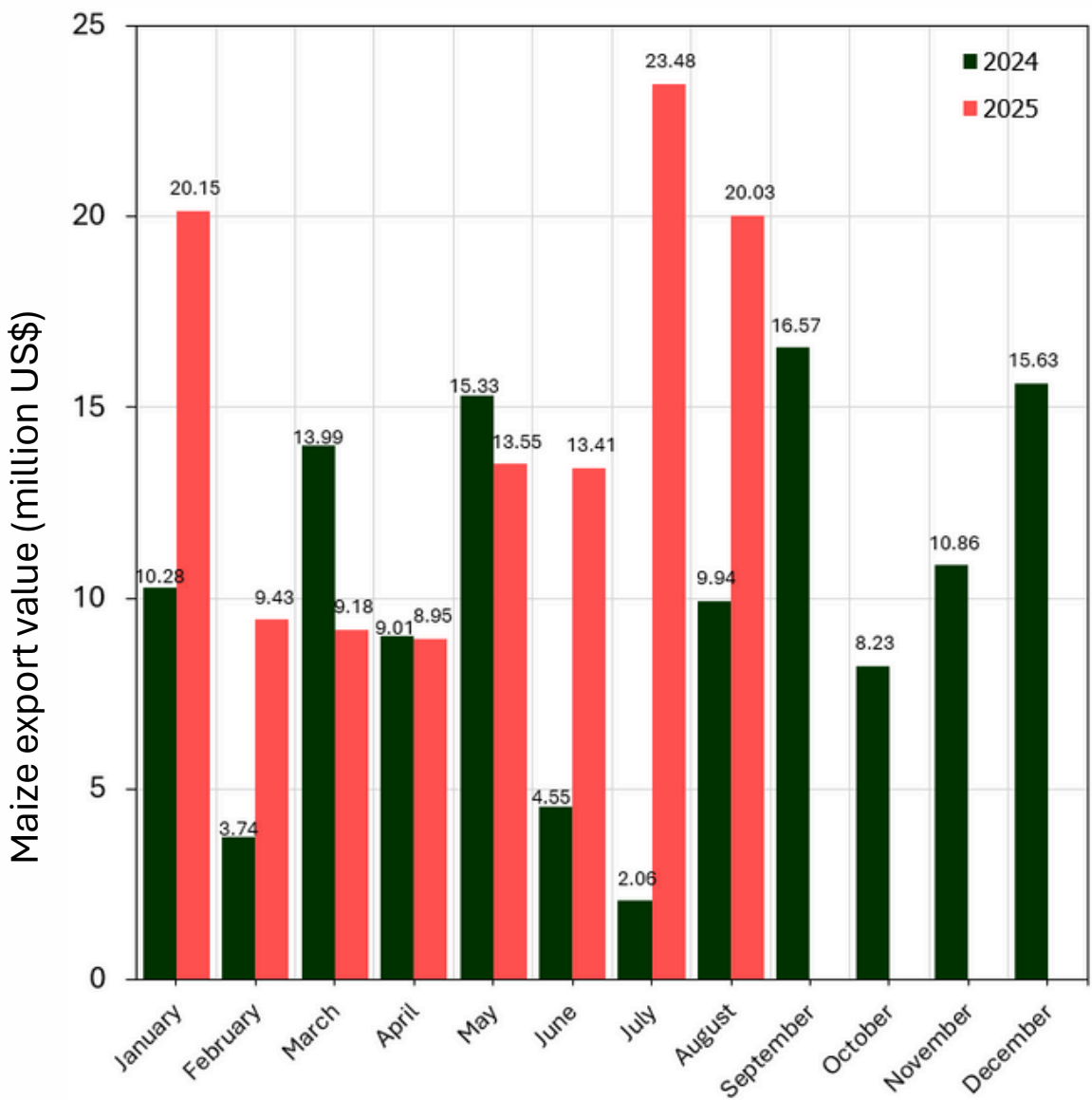


Figure 64: Monthly export value of maize from 2024 to 2025

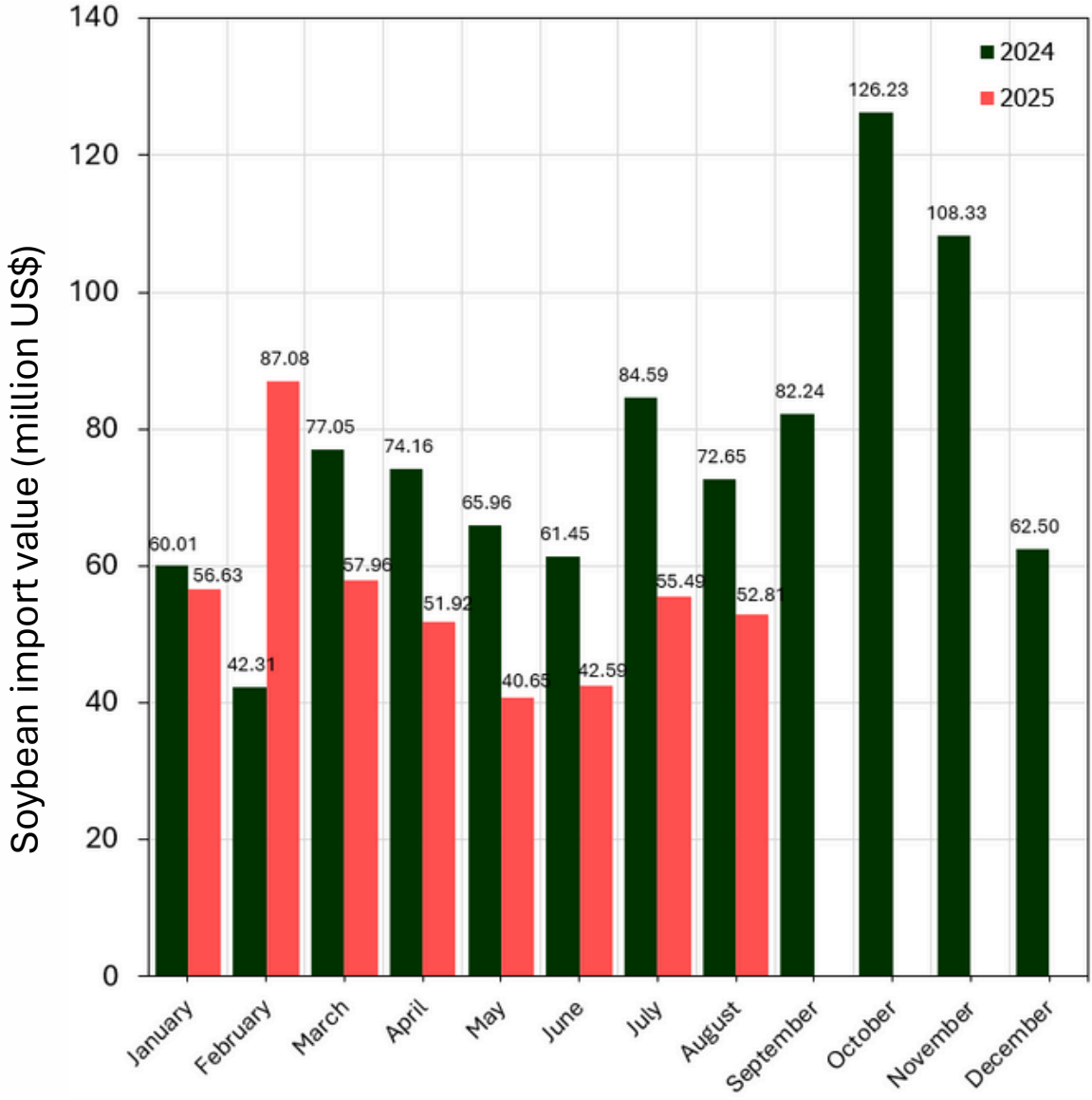


Figure 65: Monthly import value of soybean from 2024 to 2025

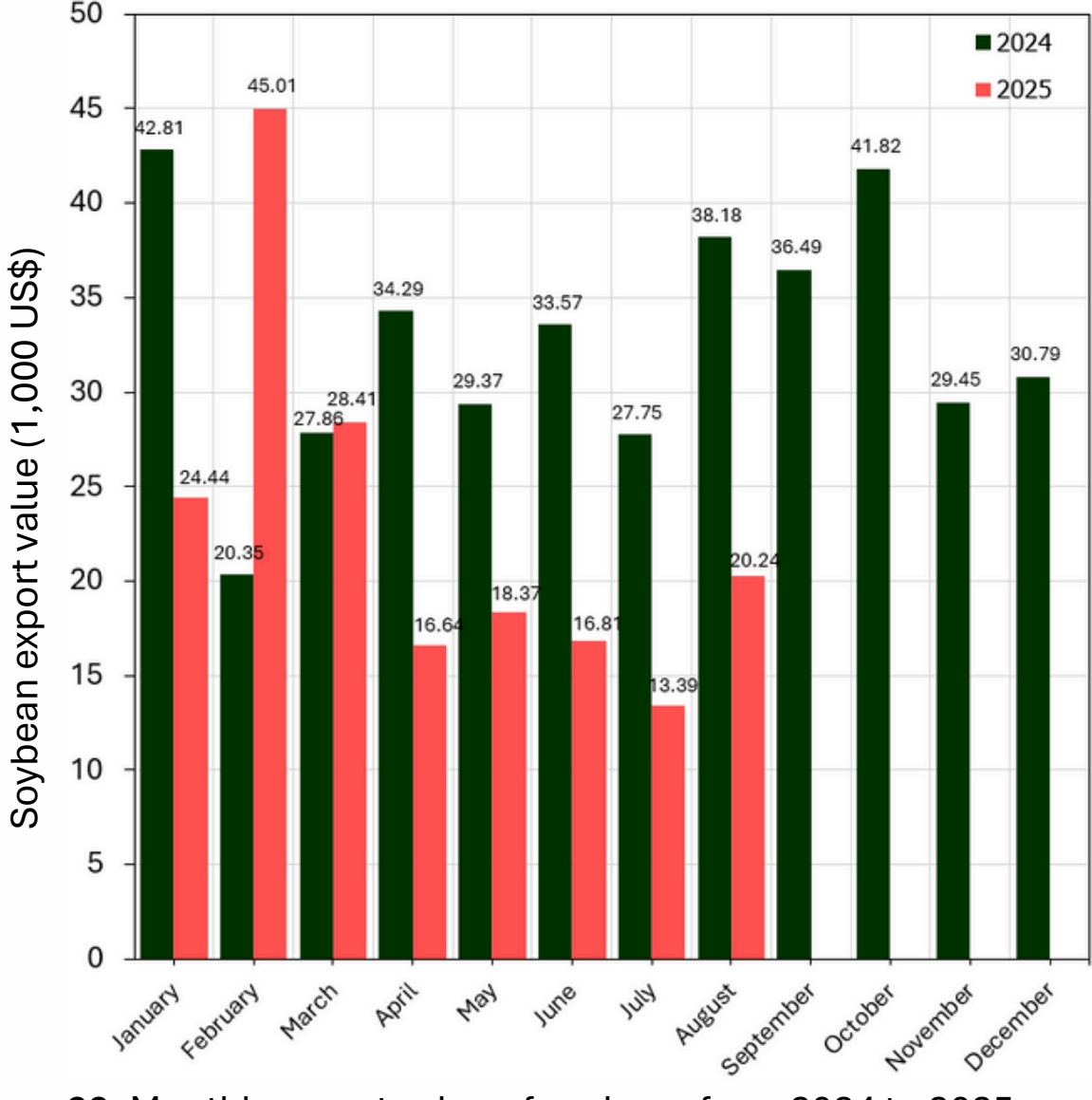


Figure 66: Monthly export value of soybean from 2024 to 2025

For sugarcane crops, According to the Vietnam Sugar and Sugarcane Association (VSSA), the sugar industry is forecast to a continued growth in 2025–2026, with both acreage and output surpassing the previous season. VSSA projects 201,287 hectares harvested, up more than 12,000 hectares from 2024–2025. Processed cane is expected to reach 13.34 million tons, up 7.3 percent, with average yields of 67.3 tons per hectare, 1.3 tons higher than the prior season. However, the occurrence of typhoons in the first 8 months of 2025, bringing heavy rains, flooding, and strong winds, may cause negative impacts on the cultivated area, yield, and output of Vietnam's sugarcane in 2025.

In terms of trade, the first 8 months of 2025, export value of Vietnam’s sugar decreased considerably by 27.9 percent compared to previous year, as a result of lower export to China, Philippines, Indonesia, Thailand. Similarly, sugar import value of Vietnam dropped by 17.3 percent mainly due to lower import from China, Thailand, Lao PDR, Myanmar (Figures 67–68).

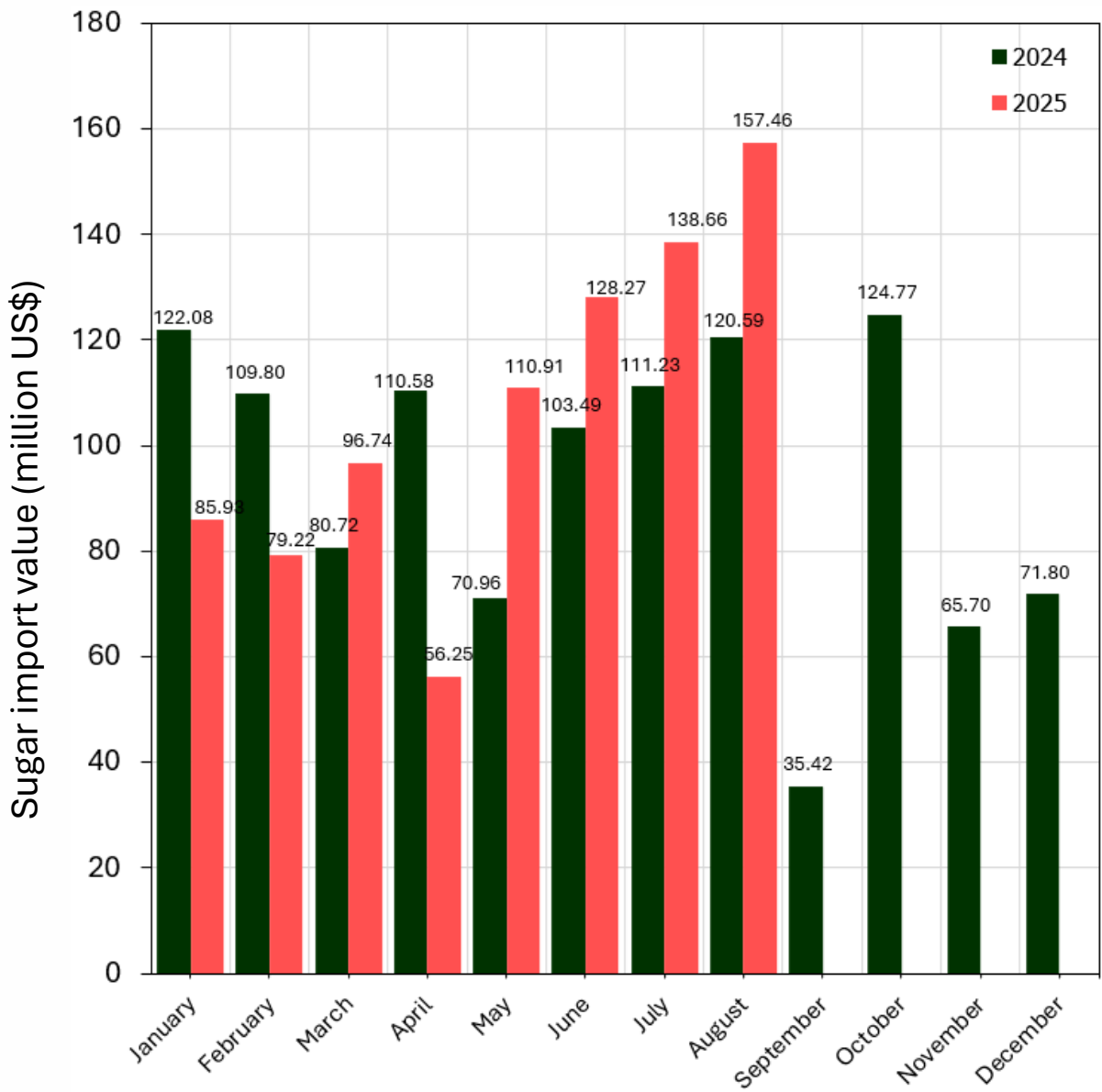


Figure 67: Monthly import value of sugar from 2024 to 2025

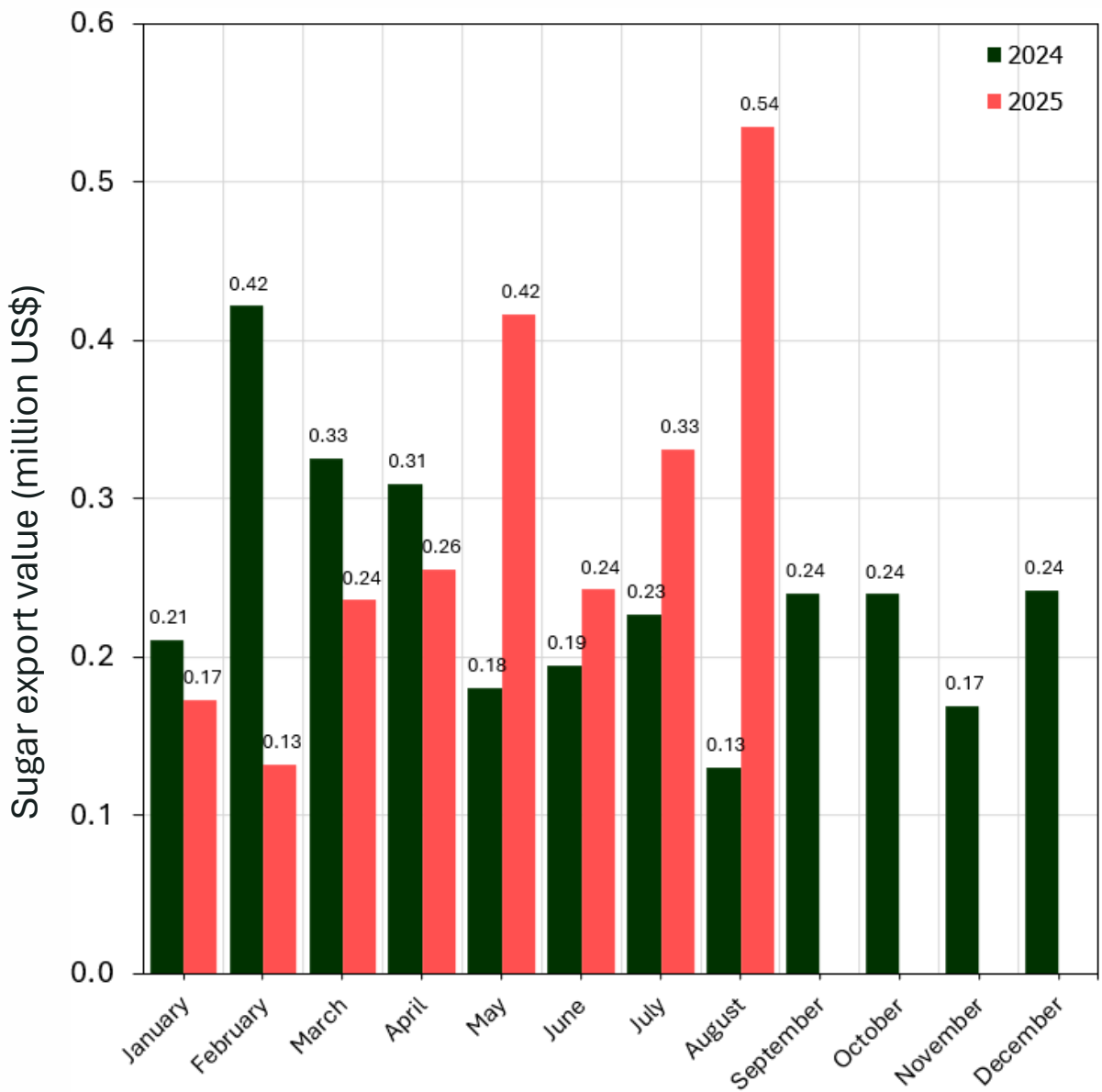


Figure 68: Monthly export value of sugar from 2024 to 2025

For cassava crops, according to the National Statistics Office, Vietnam’s cassava area in the 2025 winter–spring crop was estimated to decrease by 3.4 percent compared to the same period last year. The yield is estimated to increase by 1.9 percent, and output is estimated to decline by 1.6 percent. Adverse weather conditions, with the occurrence of storms in 2025, along with heavy rains and flooding, may negatively affect the cultivated area, yield, and output of cassava in Vietnam in 2025.

In terms of trade, in the first eight months of 2025, export value of Vietnam’s cassava rose by 3.6 percent compared to previous year, mainly thanks to higher export value to China. However, the increase in cassava export value was driven by a 57.2 percent rise in export volume, while the average export price of cassava and cassava products was estimated to have dropped by as much as 34.1 percent. This reflects the unsustainable nature of export growth in Vietnam’s cassava sector. In terms of import, cassava's import value of Vietnam declined by 14.4 percent as a result of lower import from Lao PDR (Figures 69–70).

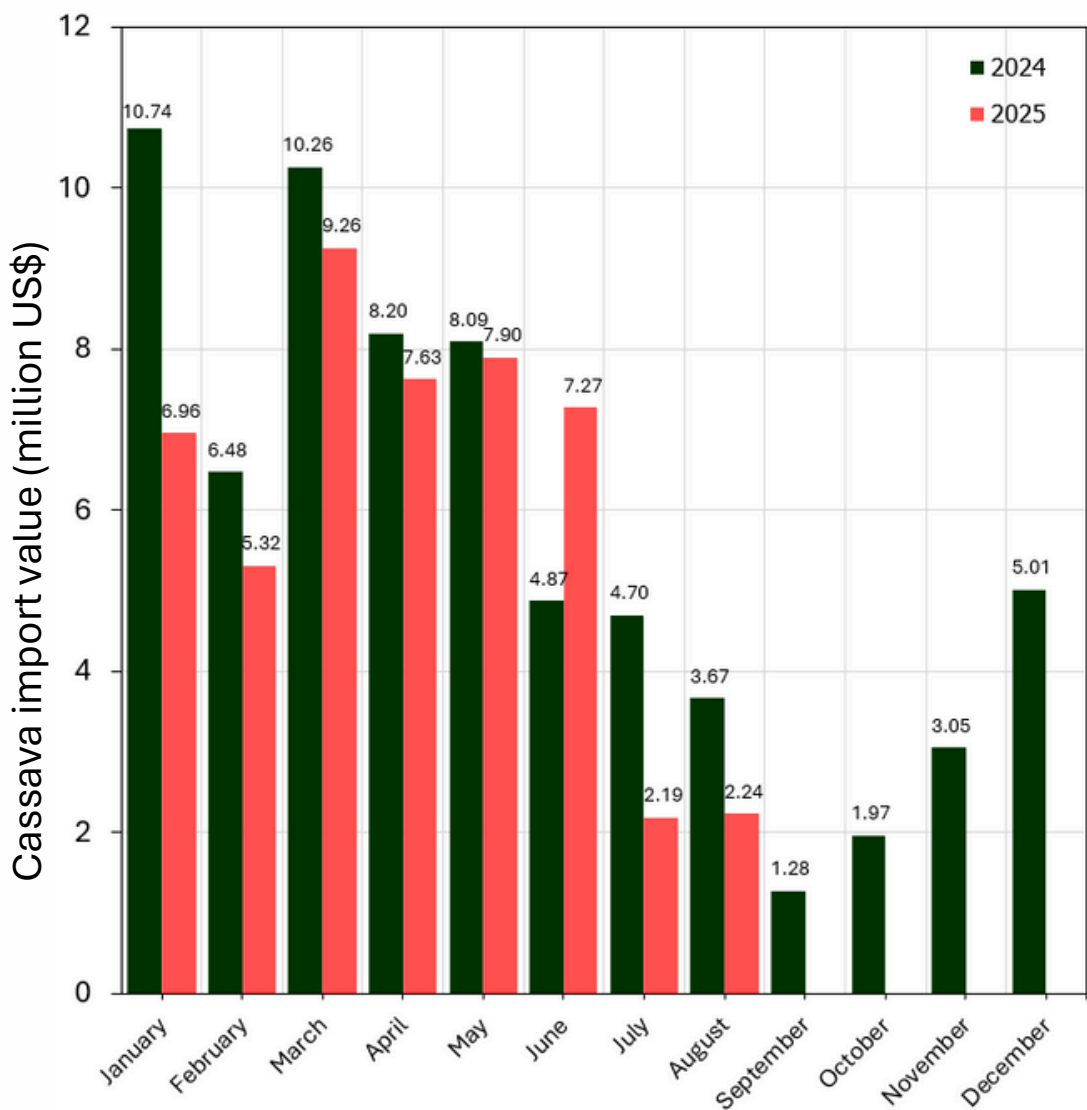


Figure 69: Monthly import value of cassava from 2024 to 2025

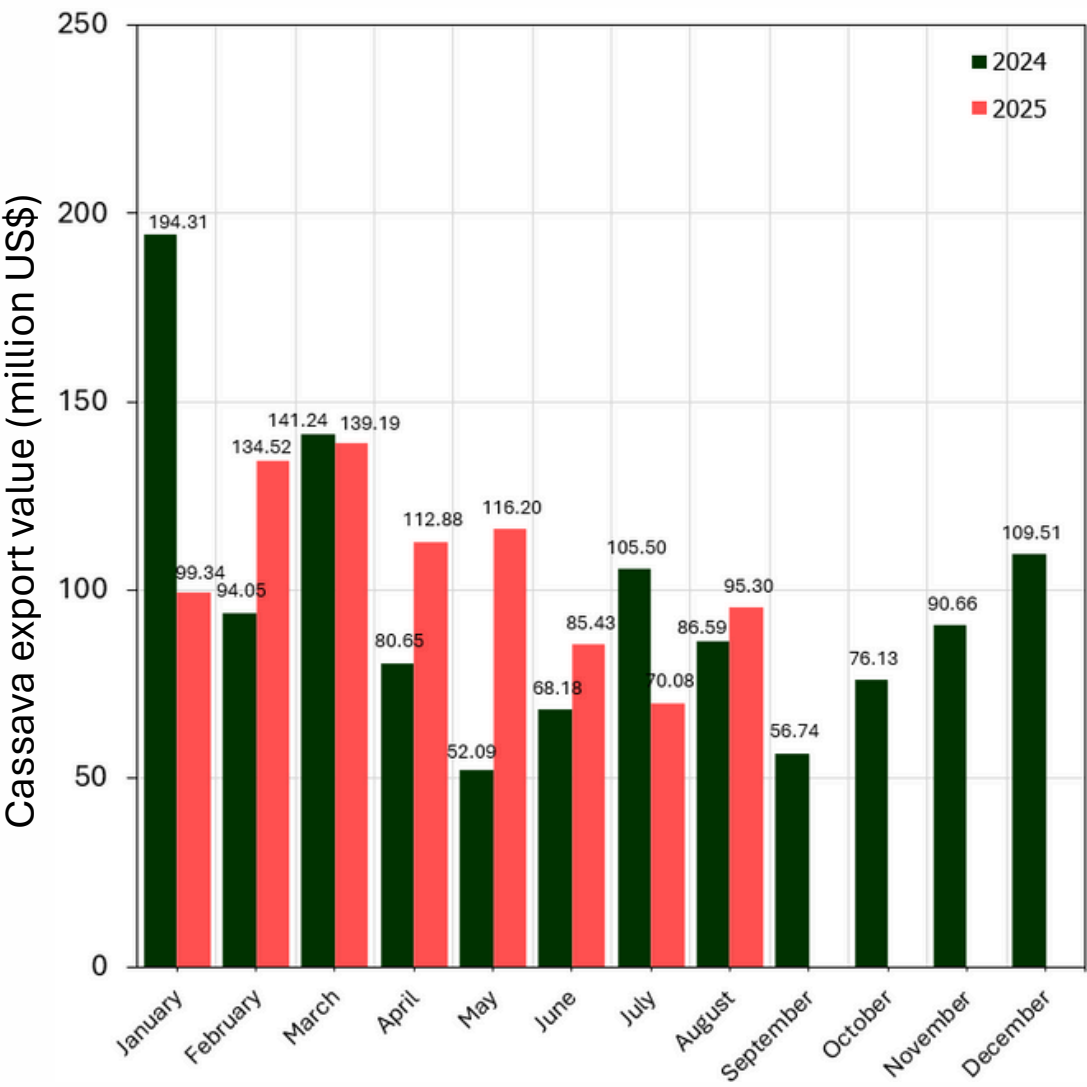


Figure 70: Monthly export value of cassava from 2024 to 2025

