



ASEAN Food Security
Information System

RICE GROWING OUTLOOK REPORT

DECEMBER 2025





Rice Growing Outlook Report

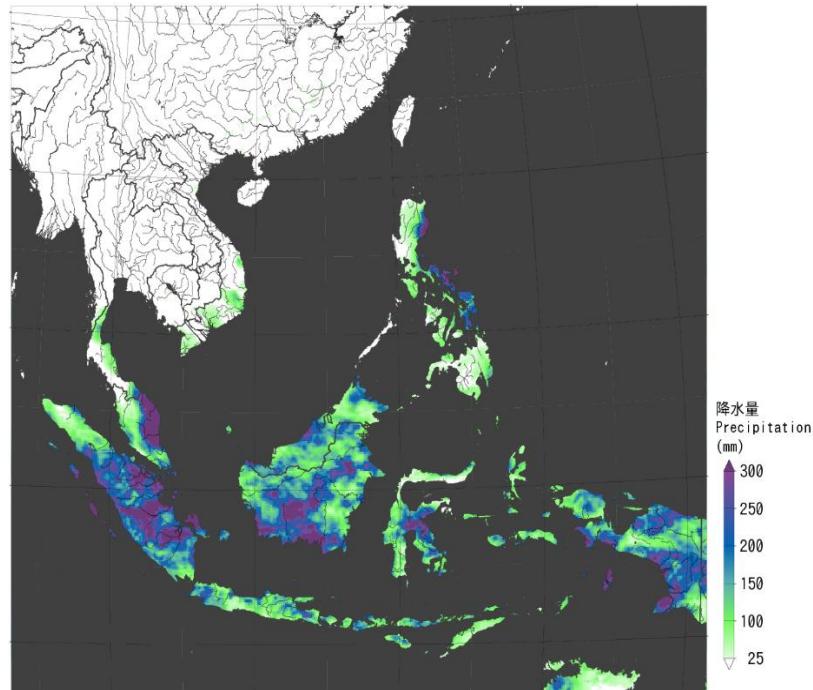
December, 2025

Overview

In the Northern side of SE-Asia, the harvesting of wet season rice has almost been completed in all countries and regions. This season's weather was affected by heavy rains and strong winds, which were brought by the passage of typhoons. Generally, the final production was fair to slightly poor. The dry season rice is in seeding stage to early growing stage under favorable growing conditions. In Cambodia, the planting area is expected to decrease due to the effects of the conflict.

In the Southern side of SE-Asia, the harvesting of dry season rice will be completed this December. Yield conditions are expected to be better than the last dry season due to sufficient sunshine during the growing season. On the other hand, the progress of wet season rice planting is generally at the same level as in normal years. And the harvest has started in Malaysia.

JASMAI: Precipitation condition in early December



Brunei

About 85% of the wet season rice is in tillering stage in both irrigated and rainfed areas, and about 15% are already in young panicle forming stage. Solar radiation and surface temperatures remain high, and rice outlook remains good.

Cambodia

The planted area of dry season rice has reached 67% of the national plan (695 thousand hectares), and the growing stage is mainly from tillering to grain filling stage. This year's dry season rice planting is expected to be significantly decreased as planting is not possible in the west-north region due to the effects of the conflict.

Indonesia

This December is the third month of wet-season rice planting. The planting of wet-season rice is 3 million hectares. The planting progress is steadily expanding due to the intensive rainfall from late November to mid-December.

Additionally, the harvest of dry-season rice will be completed this December, covering 5.1 million hectares, which is 13.4% higher than last year. Yield conditions are expected to be better than the last dry season due to sufficient sunshine during the growing season.

Laos

The wet season rice of lowland is at the end of the harvesting stage under good conditions. The final harvested area is estimated to be around 763 thousand hectares. The yield is 4.22 tons/ha, and the total production is expected to be 3.2 million tons.

On the other hand, the harvesting of upland rice is nearly completed. The harvested area is around 74 thousand hectares, and the final production is forecasted to be 181 thousand tons, which is an increase from last year.

Malaysia

The planting progress for wet-season rice reached approximately 67% of the total cultivated area and the crop is currently at various stages, ranging from seedling and tillering to maturity.

On the other hand, wet-season rice is being harvested with covering approximately 8% of the total cultivated area. Planting and harvesting progress were slightly delayed due to high rainfall and flooding in several areas, particularly in the Central, some parts of the Western, and East Coast regions of Malaysia.

Myanmar

The wet season rice has been harvested on 3.6 million hectares, accounting for 59.4% of the total planted area. The progress of the harvesting work is faster than last year. The current production is 15.3 million tons of paddy with a yield of 4.3 tons per hectare. The yield is good and slightly higher than last year because the weather is favorable

About 100 thousand hectares of the dry season rice have been planted mainly in the delta areas. Seeding work progress is similar to last year, and the current weather favors the seeding of the dry season rice.

Philippines

Wet season rice planted in July to August is currently in the harvesting stage. Rice production may have decreased compared to the same period of the previous year. The decrease in production was due to the occurrence of heavy rains and strong winds, which were brought by the passage of typhoons in the country.

Meanwhile, the dry season rice planted in November to December is in the seeding period. Precipitation index showed that the country is more likely to receive near to above normal rainfall conditions.

Thailand

The harvesting of wet-season rice was completed in December. Total production is estimated at approximately 26.99 million tons, representing a 0.08% decline compared with last year due to a decrease in cultivated area and flood-related damage in affected regions. Nevertheless, yields increased slightly in most cultivation areas, where adequate water availability and favorable weather conditions.

Meanwhile, the dry season rice is in the sowing stage. The planted area is forecast to decrease compared with last year, primarily due to the lower rice prices. In addition, persistent flooding in some areas has disrupted land preparation and planting activities. The growing conditions remain favorable, supported by sufficient irrigation water and natural water sources for cultivation.

Vietnam

In Northern Vietnam, the wet season of rice has been harvested. The dry season rice has not yet commenced, as this period coincides with the sowing time for winter crops.

In the South, the wet season rice crops (autumn-winter rice and seasonal rice) are still in the harvesting stage, with the harvested area reaching 0.78 million hectares out of 1.28 million hectares. Yield is forecast to remain unchanged compared with last year, supported by favorable warm weather conditions and improved irrigation preparation.

On the other hand, the dry season rice (winter-spring rice) is currently in the sowing stage with reaching 0.7 million hectares, concentrated mainly in the Mekong River Delta. Crop growth is assessed as good, benefiting from stable weather conditions.

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