



ASEAN FOOD SECURITY INFORMATION SYSTEM

ASEAN AGRICULTURAL COMMODITY OUTLOOK

NO.31 December 2023



RELEASED BY AFSIS SECRETARIAT
OFFICE OF AGRICULTURAL ECONOMICS (OAE)
MINISTRY OF AGRICULTURE AND COOPERATIVES
BANGKOK, THAILAND
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ASEAN FOOD SECURITY INFORMATION SYSTEM (AFSIS)

Report on

ASEAN Agricultural Commodity Outlook

No. 31 December 2023

*Released by
AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
www.aptfssis.org*

Acknowledgement

I extend my heartfelt gratitude to all AFSIS Focal Points and their dedicated staff for their unwavering support and invaluable contributions in providing the essential data analysed in this ACO report No. 31. My sincere thanks to Mr. Charapon Chantorn and Mr. Thanapat Chukaew for their meticulous preparation of ACO forms, data collection from member countries, rigorous analysis, and the creation of this comprehensive report. The timely release of ACO report No. 31 is a testament to the significant contributions, admirable efforts, and hard work of all member countries involved.

This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 31, along with its predecessors, stands as a valuable resource benefiting all ASEAN members, policy makers, and relevant agencies. These reports serve as essential tools for planning and policymaking, crucial in ensuring food security within individual nations and the ASEAN regions.

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

I express my profound appreciation to the Plus Three Countries and various organizations for their steadfast support of AFSIS activities, particularly in the human resource development. A special note of gratitude is reserved for the Ministry of Agriculture, Forestry, and Fisheries, Government of Japan, for their consistent financial backing, enabling the realization of AFSIS's initiatives.

I extend my sincere thanks to all previous AFSIS Managers for their invaluable guidance, unwavering support, and kindness towards the AFSIS Secretariat.

Lastly, I am deeply grateful to all other AFSIS staff members for their dedication and hard work in the execution of all AFSIS activities. Your collective efforts have significantly contributed to the achievements of our organization, and for that, I am truly thankful.

Thank you



Computer Technical Officer, Senior Professional Level
Dr. Sumanya Ngandee
AFSIS Manager

Foreword

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

In this latest of ASEAN Agricultural Commodity Outlook, it provides both national and regional information on production, utilization, monitoring the global food crisis and food insecurity, stock, trade, and FOB/CIF prices. The explanation for significant changes and unusual phenomena is also showed in this report. Furthermore, the report is scrutinized by all member states before publication.

AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives



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Rice Outlook for 2024

Highlights

The forecast for rice supply in ASEAN predicts 1.45 million tons or 0.88 percent rise, increasing to 167.04 million tons in 2024 of milled rice from 165.59 million tons in 2023 (Table 1). This uptick in supply is primarily attributed to the augmented stock and production carried over from the previous year.

The beginning stock is forecasted to increase by 0.14 million tons or 0.48 percent increase from 29.12 million tons in 2023 to 29.26 million tons in 2024.

The rice production in 2024 is forecasted to be 130.63 million tons, increasing from 127.89 million tons in 2023, or 2.14 percent increase. On the other hand, imports are forecasted to decrease by 1.42 million tons or 16.55 percent from 8.58 million tons in 2023 to 7.16 million tons in 2024.

Considering only available data, rice export is expected to decrease 0.34 million tons or 1.74 percent from 19.57 million tons in 2023 to 19.23 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2024 is expected to be 111.63 percent. Additionally, the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 25.00 percent in 2024 (Table 1).

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

Items	2023	2024	Unit: Million tons	
			Change	
			Quantity	%
Supply (Million tons)	165.59	167.04	1.45	0.88
Beginning stock	29.12	29.26	0.14	0.48
Production	127.89	130.63	2.74	2.14
Import	8.58	7.16	-1.42	-16.55
Demand (Million tons)	165.59	167.04	1.45	0.88
Domestic utilization	116.76	117.02	0.26	0.22
Export	19.57	19.23	-0.34	-1.74
Ending stock	29.26	30.79	1.53	5.23
Ratio of production to domestic utilization (%)	109.53	111.63	2.10	1.92
Ratio of beginning stock to domestic utilization (%)	24.94	25.00	0.06	0.24

ASEAN Rice Situation in 2023

► *Production*

The estimated paddy production in ASEAN for the crop year 2022/23, reported in 2023 at 198.14 million tons, marking a growth of 2.95 million tons or 1.52 percent compared to the 195.18 million tons recorded in the previous crop year of 2021/22. This upswing was attributed to expansions in planted, harvested areas and yield. The increase in production observed in every country of ASEAN except for Indonesia. For Singapore, which have not reported data on rice cultivation. (Table 2-5, Figure 1-4).

For **Brunei**, the increase of production was attributed to the rise in yield, which was influenced by favorable weather, the use of more improved varieties, increased fertilizer application, and better care practices.

For **Cambodia**, the increase in production was credited to growth in both planted area and yield. The expansion in planted areas was driven by factors such as farmers responding to a price surge, government policies, and emergency interventions supplying seeds to farmers impacted by natural disasters like flooding and drought. Furthermore, government policies and emergency interventions related to the irrigation system were executed to boost production in the event of drought. Concurrently, the increase in yield was a consequence of adopting more advanced varieties, enhanced fertilizer application, and improved agricultural practices.

For **Lao PDR**, the increase of production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to prices increases, a decrease in the prices of competing crops, favorable weather conditions, and government policies. Meanwhile, the increase in yield was attributed to adequate sunshine and rainfall during paddy growth, the utilization of

improved varieties, and improved care practices.

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

For **Myanmar**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was driven by farmers responding to prices increase. Similarly, the increase in yield was influenced by the use of more improved varieties and improved care practices.

For **Thailand**, the increase of production was due to the increase in planted and yield. The increase in planted areas is attributed to the availability of sufficient water for cultivation. The increase in yield is attributed to suitable weather conditions and the availability of sufficient water for the growth of rice plants. The favorable weather, coupled with diligent care from farmers, contributes to the improved yield.

For **Vietnam**, the increase in production was attributed to the rise in yield, driven by favorable weather conditions.

For **Indonesia**, the decrease in production was attributed to a decrease in planted area. The reduction in planted area influenced by the competition of prices, as farmers sought higher returns from other commodities such as food crops or horticulture.

► **Utilization and Stock**

The estimated domestic utilization of rice (milled rice) in ASEAN for the calendar year 2023 reached 116.76 million tons, representing an increase from 114.86 million tons in 2022. This rise amounted to approximately 1.90 million tons, marking a percentage increase of 1.66 percent (Table 7-8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2023 was estimated at 109.53 percent, a slight decrease from 109.99 percent in 2022. This suggests that, as a whole, rice production in ASEAN during 2022 was still sufficient to meet the regional demand. However, on the country-by-country basis, some countries in the region still need to import rice for their domestic consumption. The decline in the self-sufficiency ratio of production to domestic utilization decreased in Indonesia, Myanmar, and the Philippines. Meanwhile, the self-sufficiency ratio increased in Cambodia, Lao PDR, Malaysia, Thailand, and Vietnam. The highest ratio was found in Thailand, Vietnam, and Cambodia respectively, while the lowest ratio was in Brunei (Table 10, Figure 12).

The beginning stock in 2023 of ASEAN was estimated at 28.77 million tons, increasing 0.34 million tons from 29.11 million tons in 2022 or 1.19 percent. (Table 7-8).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in 2023 for the whole ASEAN was estimated at 24.94 percent, which slightly decreased about 0.11 percent from the previous year. Brunei, Cambodia and Myanmar have the-ratios above 50 percent of the optimum level (Table 11, Figure 13).

For the overall production, the data from the major crop namely rice, the staple food of the ASEAN region, demonstrates that many countries in the region **have self-dependency in terms of food production and food security**. However, they still have to deal with the problem of high food prices which is one

of the determinants that cause food insecurity. As most of the producing countries in ASEAN are developing countries, the majority of populations in the countries have low income and middle-income which will be affected the most by the high food price crisis. This might raise the concerns of food insecurity in the future. On the other hand, this situation can be advantageous for rice export of ASEAN countries, especially for countries that have excessive supply for generating income from export.

► **Trade**

In 2023, the entire ASEAN region exported 19.57 million tons of milled rice, marking an increase of 1.64 million tons or 9.13 percent compared to the 17.93 million tons exported in 2022. Notably, the two primary exporting countries, Vietnam and Thailand, exporting approximately 9.22 million tons and 8.50 million tons, respectively in 2023 (Table 7-8 and Figure 5-6)

The total import by ASEAN in 2023 is estimated to be 8.58 million tons, an increase of 1.79 million tons or about 26.27 percent from 6.79 million tons in 2022. The Philippines was the biggest importer in the region, which imported 3.80 million tons of milled rice (Table 7-8, Figure 8-9).

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

► **Prices**

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

► **Damaged Area**

In the crop year 2022/23, the estimated damaged area of paddy in ASEAN for the year 2023 amounted to 0.15 million hectares. Among this, 0.10 million hectares, constituting 67.99 percent, were attributed to flooding. Notably, Indonesia bore the brunt of the flood damage, accounting for 0.05 million hectares or 55.59 percent of the total damage across ASEAN. Additionally, factors such as drought, pests, and diseases contributed to the overall damage (Table 6).

Prospects for Rice in 2024

► Production

ASEAN paddy production in 2024 (crop year 2023/24) is estimated at 201.84 million tons, increasing by 3.70 million tons, which is 1.87 percent from 198.14 million tons in 2023 (crop year 2022/23) (Table 2-5, Figure1-4).

► Utilization and Stock

The domestic utilization of milled rice in ASEAN in 2024 is projected to be 117.02 million tons, increasing about 0.26 million tons or 0.22 percent compared to 116.76 million tons in 2023 (Table 8-9).

The beginning stock for 2024 is anticipated to be 29.26 million tons, reflecting an increase of 0.14 million tons or 0.48 percent from the 29.12 million tons recorded in 2023. Additionally, the ending stock is expected to see a rise of 1.54 million tons or 5.25 percent, growing from 29.26 million tons in 2023 to 30.80 million tons in 2024 (Table 8-9 and Figure 11).

The ratio of production to domestic utilization (**self-sufficient ratio**) is forecast to be 111.63 percent in 2024, which will increase from 109.53 percent in 2023. This indicates that rice production in ASEAN is still enough for consumption within the region (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in ASEAN in 2024 is forecasted to increase 25.00 percent from 24.94 percent in 2023 (Table 11, Figure 13).

► Trade

The rice import from ASEAN is forecasted to decrease from 8.58 million tons in 2023, decrease of 1.43 million tons or about 1.43 percent to 7.16 million tons in 2024 (Table 8-9, Figure 8 and 10).

For the export, the whole ASEAN is forecasted to export 19.23 million tons in 2024, decrease of 0.34 million tons or about 1.74 percent compared to 19.57 million tons in 2023 (Table 8-9, Figure 5 and 7).

Table 2 Paddy production in ASEAN countries, 2022 - 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	195,186.50	198,145.48	2,958.99	1.52	201,844.87	3,699.39	1.87
Brunei	3.56	4.21	0.65	18.13	4.55	0.34	8.15
Cambodia	11,623.87	12,487.73	863.85	7.43	12,473.04	-14.69	-0.12
Indonesia	54,748.98	53,625.54	-1,123.44	-2.05	56,961.80	3,336.26	6.22
Lao PDR	3,781.58	4,342.00	560.42	14.82	3,997.90	-344.10	-7.92
Malaysia	2,281.74	2,430.03	148.29	6.50	2,394.46	-35.56	-1.46
Myanmar	27,446.01	27,990.92	544.90	1.99	28,496.79	505.87	1.81
Philippines	19,903.98	20,038.91	134.93	0.68	20,583.15	544.24	2.72
Singapore	N/A						
Thailand	32,977.78	33,910.86	933.08	2.83	31,920.73	-1,990.13	-5.87
Vietnam	42,419.00	43,315.30	896.30	2.11	45,012.45	1,697.15	3.92

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	46,075.26	46,324.34	249.07	0.54	46,723.60	399.26	0.86
Brunei	1.59	1.50	-0.09	-5.64	1.61	0.11	7.25
Cambodia	3,403.16	3,549.16	146.00	4.29	3,471.91	-77.25	-2.18
Indonesia	10,499.29	10,270.73	-228.56	-2.18	10,791.09	520.36	5.07
Lao PDR	959.40	1,003.37	43.96	4.58	939.10	-64.27	-6.41
Malaysia	637.96	645.56	7.60	1.19	644.97	-0.59	-0.09
Myanmar	7,053.36	7,094.92	41.57	0.59	7,115.21	20.28	0.29
Philippines	4,801.98	4,852.04	50.06	1.04	4,906.84	54.80	1.13
Singapore	N/A						
Thailand	11,609.60	11,829.86	220.26	1.90	11,488.76	-341.11	-2.88
Vietnam	7,108.92	7,077.20	-31.72	-0.45	7,364.12	286.92	4.05

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	45,468.75	45,633.85	165.10	0.36	46,139.98	506.13	1.11
Brunei	1.48	1.43	-0.06	-3.75	1.50	0.07	5.00
Cambodia	3,302.68	3,510.44	207.76	6.29	3,459.91	-50.53	-1.44
Indonesia	10,452.67	10,173.50	-279.18	-2.67	10,791.09	617.60	6.07
Lao PDR	957.63	993.67	36.04	3.76	939.10	-54.57	-5.49
Malaysia	635.42	645.56	10.14	1.60	644.97	-0.59	-0.09
Myanmar	7,043.32	7,090.30	46.98	0.67	7,110.83	20.53	0.29
Philippines	4,801.98	4,852.04	50.06	1.04	4,906.84	54.80	1.13
Singapore	N/A						
Thailand	11,164.66	11,289.73	125.07	1.12	10,921.62	-368.10	-3.26
Vietnam	7,108.92	7,077.20	-31.72	-0.45	7,364.12	286.92	4.05

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

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	4.29	4.34	0.05	1.17	4.37	0.03	0.69
Brunei	2.40	2.94	0.54	22.50	3.03	0.09	3.06
Cambodia	3.52	3.56	0.04	1.14	3.61	0.05	1.40
Indonesia	5.24	5.27	0.03	0.57	5.28	0.01	0.19
Lao PDR	3.95	4.37	0.42	10.63	4.26	-0.11	-2.52
Malaysia	3.59	3.76	0.17	4.74	3.71	-0.05	-1.33
Myanmar	3.90	3.95	0.05	1.28	4.01	0.06	1.52
Philippines	4.14	4.13	-0.01	-0.24	4.19	0.06	1.45
Singapore	-						
Thailand	2.95	3.00	0.05	1.69	2.92	-0.08	-2.67
Vietnam	5.97	6.12	0.15	2.51	6.11	-0.01	-0.16

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

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

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	104,893	46,876	463	417	1,620	0	154,268
Brunei	16	18	18	20	-	-	72
Cambodia	33,961	9,520	-	-	-	-	43,481
Indonesia	58,306	37,338	398	398	-	-	96,439
Lao PDR	9,648	-	47	-	-	-	9,695
Malaysia	-	-	-	-	-	-	0
Myanmar	2,962	-	-	-	1,620	-	4,582
Philippines	-	-	-	-	-	-	0
Singapore	-	-	-	-	-	-	0
Thailand	-	-	-	-	-	-	0
Vietnam	-	-	-	-	-	-	0

Remark: N/A refers to data that is not available.**Table 7 Rice balance sheet of ASEAN countries, 2022 (milled rice)**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	28,774,973	126,335,723	6,795,694	161,906,390	114,861,046	17,928,802	29,116,542	161,906,390
Brunei	17,910	2,138	25,199	45,247	27,627		17,620	45,247
Cambodia	1,646,059	7,439,278		9,085,337	5,529,409	637,004	2,918,924	9,085,337
Indonesia	5,272,537	35,050,295	64,895	40,387,727	36,320,697	2,793	4,064,237	40,387,727
Lao PDR	88,893	2,268,948	23,305	2,381,146	2,298,155	45,638	37,353	2,381,146
Malaysia	0	1,597,215	1,234,208	2,831,423	2,717,403	114,021	0	2,831,423
Myanmar	*11,233,262	17,634,277	324	28,867,863	15,237,732	1,382,640	12,247,491	28,867,863
Philippines	1,859,000	*13,335,667	3,863,000	19,057,667	16,793,000		*2,264,667	19,057,667
Singapore			369,666	369,666	238,427	131,238	N/A	369,666
Thailand	*5,516,239	*21,435,554	6,663	26,958,456	*14,685,189	7,710,236	4,563,031	26,958,456
Vietnam	3,141,073	27,572,350	1,208,434	31,921,857	21,013,406	7,905,232	3,003,220	31,921,857

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	29,116,542	127,889,306	8,581,185	165,587,033	116,763,954	19,566,071	29,257,008	165,587,033
Brunei	17,620	2,525	28,833	48,978	31,128		17,850	48,978
Cambodia	2,918,924	7,992,144		10,911,068	6,384,115	529,924	3,997,029	10,911,068
Indonesia	4,064,237	34,331,070	1,890,254	40,285,561	35,595,593	1,581	4,688,387	40,285,561
Lao PDR	37,353	2,605,200	70,815	2,713,368	2,401,144	16,935	295,289	2,713,368
Malaysia	0	1,701,018	*1,119,889	2,820,907	*2,685,083	*135,824	0	2,820,907
Myanmar	12,247,491	17,634,277	23	29,881,791	17,523,262	1,002,357	11,356,172	29,881,791
Philippines	* 2,264,667	*13,426,067	*3,800,000	19,490,735	*17,030,000		*2,460,734	19,490,735
Singapore	N/A		455,078	455,078	298,791	156,288	N/A	455,078
Thailand	4,563,031	*22,042,058	*6,650	26,611,739	*13,602,390	8,500,000	4,509,349	26,611,739
Vietnam	3,003,220	28,154,946	1,209,642	32,367,809	21,212,448	9,223,162	1,932,198	32,367,809

Remark: * The value is estimated by AFSIS Secretariat.**Table 9 Rice balance sheet of ASEAN countries, 2024 (milled rice)**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	29,257,008	130,629,917	7,155,063	167,041,988	117,021,563	19,226,651	30,793,774	167,041,988
Brunei	17,850	2,731	29,698	50,279	32,192		18,087	50,279
Cambodia	3,997,029	7,982,745		11,979,774	6,262,769	686,558	5,030,447	11,979,774
Indonesia	4,688,387	36,466,944	662,621	41,817,952	36,734,936	2,506	5,080,510	41,817,952
Lao PDR	295,289	2,398,740		2,694,029	2,395,149		298,880	2,694,029
Malaysia	0	1,676,125	*1,135,187	2,811,312	*2,661,312	*150,000	0	2,811,312
Myanmar	11,356,172	*18,000,000	*100	29,356,272	*16,800,000	*1,100,000	*11,456,272	29,356,272
Philippines	2,460,734	*14,096,067	*3,700,000	20,256,802	*16,520,000		*3,736,802	20,256,802
Singapore	N/A		412,372	412,372	268,609	143,763	N/A	412,372
Thailand	4,509,349	*20,748,473	*6,650	25,264,471	*13,952,515	8,000,000	3,311,957	25,264,471
Vietnam	1,932,198	29,258,093	1,208,434	32,398,726	21,394,082	9,143,824	1,860,820	32,398,726

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	126,335,723	114,861,046	109.99	127,889,306	116,763,954	109.53	130,629,917	117,021,563	111.63
Brunei	2,138	27,627	7.74	2,525	31,128	8.11	2,731	32,192	8.48
Cambodia	7,439,278	5,529,409	134.54	7,992,144	6,384,115	125.19	7,982,745	6,262,769	127.46
Indonesia	35,050,295	36,320,697	96.50	34,331,070	35,595,593	96.45	36,466,944	36,734,936	99.27
Lao PDR	2,268,948	2,298,155	98.73	2,605,200	2,401,144	108.50	2,398,740	2,395,149	100.15
Malaysia	1,597,215	2,717,403	58.78	1,701,018	2,685,083	63.35	1,676,125	2,661,312	62.98
Myanmar	17,634,277	15,237,732	115.73	17,634,277	17,523,262	100.63	18,000,000	16,800,000	107.14
Philippines	13,335,667	16,793,000	79.41	13,426,067	17,030,000	78.84	14,096,067	16,520,000	85.33
Singapore	0	238,427	0.00	0	298,791	0.00	0	268,609	0.00
Thailand	21,435,554	14,685,189	145.97	22,042,058	13,602,390	162.05	20,748,473	13,952,515	148.71
Vietnam	27,572,350	21,013,406	131.21	28,154,946	21,212,448	132.73	29,258,093	21,394,082	136.76

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

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	28,774,973	114,861,046	25.05	29,116,542	116,763,954	24.94	29,257,008	117,021,563	25.00
Brunei	17,910	27,627	64.83	17,620	31,128	56.60	17,850	32,192	55.45
Cambodia	1,646,059	5,529,409	29.77	2,918,924	6,384,115	45.72	3,997,029	6,262,769	63.82
Indonesia	5,272,537	36,320,697	14.52	4,064,237	35,595,593	11.42	4,688,387	36,734,936	12.76
Lao PDR	88,893	2,298,155	3.87	37,353	2,401,144	1.56	295,289	2,395,149	12.33
Malaysia	0	2,717,403	0.00	0	2,685,083	0.00	0	2,661,312	0.00
Myanmar	11,233,262	15,237,732	73.72	12,247,491	17,523,262	69.89	11,356,172	16,800,000	67.60
Philippines	1,859,000	16,793,000	11.07	2,264,667	17,030,000	13.30	2,460,735	16,520,000	14.90
Singapore	0	238,427	0.00	0	298,791	0.00	0	268,609	0.00
Thailand	5,516,239	14,685,189	37.56	4,563,031	13,602,390	33.55	4,512,699	13,952,515	32.34
Vietnam	3,141,073	21,013,406	14.95	3,003,220	21,212,448	14.16	1,932,198	21,394,082	9.03

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

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									17.00	26,638			1,438	1,107,563
Lao PDR														
Malaysia	3.09	7,428			90,198	30,783,600								
Myanmar	44,009	22,323,000			71,925	42,418,000			20,471	10,839,000				
Philippines														
Singapore	N/A													
Thailand	7,308	232,885,427	1,054	14,083,165	1,057,537	18,035,560,933	40,238	586,756,680	325,374	5,705,307,283	1,387	23,985,446	138,988	2,135,212,142
Vietnam					1,028,782	554,627,377			359,473	184,101,585			2,628,984	1,407,006,212

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.001	1.000					1,455	1,134,202	65.00	85,236	1,520	1,219,438
Lao PDR					9,324	3,212,316	9,324	3,212,316	7,611	4,938,677	16,935	8,150,993
Malaysia	61	47,793					90,262	30,838,820	1.65	627	90,264	30,839,447
Myanmar	1,372	694,000					137,777	76,274,000	138,871	71,280,000	276,648	147,554,000
Philippines					0.21	200	0.209	200	265.32	340,908	266	341,108
Singapore	N/A											
Thailand	88,206	2,686,242,172			8,753	175,840,514	1,668,845	29,595,873,762	5,253,803	106,693,968,469	6,922,649	136,289,842,231
Vietnam	114,015	68,544,845					4,131,254	2,214,280,019	2,921,878	1,731,780,039	7,053,132	3,946,060,058

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

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

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									3.10	1,363				
Lao PDR											7,318	2,454,007		
Malaysia					13	23,114					24,275	9,873,361		
Myanmar														
Philippines			3,103	1,348,349							115,917	43,463,099		
Singapore			8,421	6,036,956	0.09	278			100	128,808	3,587	1,777,570		
Thailand							0.005	1,456					0.008	1,434
Vietnam				430,700,544		108,120		9,030,270				2,698,465		

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia	0.04	262	754,250	410,174,667	797,842	445,937,582	1,552,095	856,113,874	42,293	23,725,922	1,594,388	879,839,796
Lao PDR			29,084	8,920,693	23,506	10,179,212	59,907	21,553,912	10,908	5,293,717	70,815	26,847,629
Malaysia	22	32,920	174,510	87,754,994	264,399	131,812,967	463,219	229,497,356	266,021	143,782,085	729,240	373,279,441
Myanmar												
Philippines			118,256	49,189,985	2,406,006	984,796,755	2,643,282	1,078,798,188	63,227	82,111,861	2,706,509	1,160,910,049
Singapore			107,434	98,656,471	127,980	79,681,596	247,522	186,281,679	206,650	131,857,433	454,172	318,139,112
Thailand	0.008	2,753			172	5,041,061	172	5,046,704	5,388	222,788,684	5,560	227,835,388
Vietnam		2,052,418		4,667,704				449,257,521		229,540,982		678,798,503

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

Table 14 FOB Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	MLYS ANGKOR	2022	1,391	1,390	1,389	1,347	1,380	1,200	1,280	1,300	1,360	1,400	1,390	1,380	1,351
	Standard 5% broken	2023	1,375	1,380	1,400	1,380	1,380	1,300	1,148	1,100	850	870	900	1,000	1,174
	Organic Parboiled Rice	2022	1,100	1,200	1,375	1,347	1,180	1,200	1,050	1,200	1,200	1,180	1,170	1,200	1,200
	Standard 5% broken	2023	1,170	1,170	1,170	1,170	1,160	1,120	1,170	1,155	1,050	1,170			1,151
Indonesia	Glutinous Rice	2022	941	590			816		428	452	657	650	1,796	2,127	940
		2023	2,600	806	650	1,771		598	13,668	2,538	3,710				3,293
Lao PDR	Mix_Milled rice quality 1 and 2	2022	341	367	362	369	383	378	349	367	367	362	366	378	366
		2023	456	525	542	467	488	660	414	387	248				465
Malaysia	Not specified	2022	383	395	360	365	395	392	382	354	341	367	378	339	371
		2023	335	336	331	336	339	349	353	356	373	521			363
Myanmar	Milled Rice 25%	2022	327	361	392	311	368	362	386	392	397	394	383	396	372
		2023	416	424	427	455	487	495	508	511	542	573			484
Thailand	Milled Rice 5%	2022	427	425	422	431	464	439	418	431	439	430	444	467	436
		2023	517	482	478	501	510	514	547	635	620	589	602	644	553
	Hommati Rice	2022	727	778	780	831	939	894	852	870	879	886	875	840	846
		2023	878	842	830	845	862	867	878	928	887	855	845	870	866
Vietnam	Milled Rice 5%	2022	486	476	495	497	489	488	490	473	472	478	493	507	487
		2023	519	535	529	523	539	551	549	593	624	640	659		569

Table 15 CIF Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022	2,964	30,000		546	505	603	749	575	562	475	616	510	3,464
		2023	493	510	512	559	560	560	570	572	603				549
Malaysia	Not specified	2022	439	427	400	442	439	456	505	475	466	486	521	515	464
		2023	520	551	518	484	493	544	535	540	600	631			542
Lao PDR	Hommati Rice	2022	361	413	431	327	514	467	412	368	366	361	361	366	396
		2023	106	130	117	448	410	493	502	503	485	282			348
Singapore	Not specified	2022	689	701	650	612	695	718	684	658	682	687	702	659	678
		2023	617	636	711	707	635	684	690	696	775	789	804	804	712

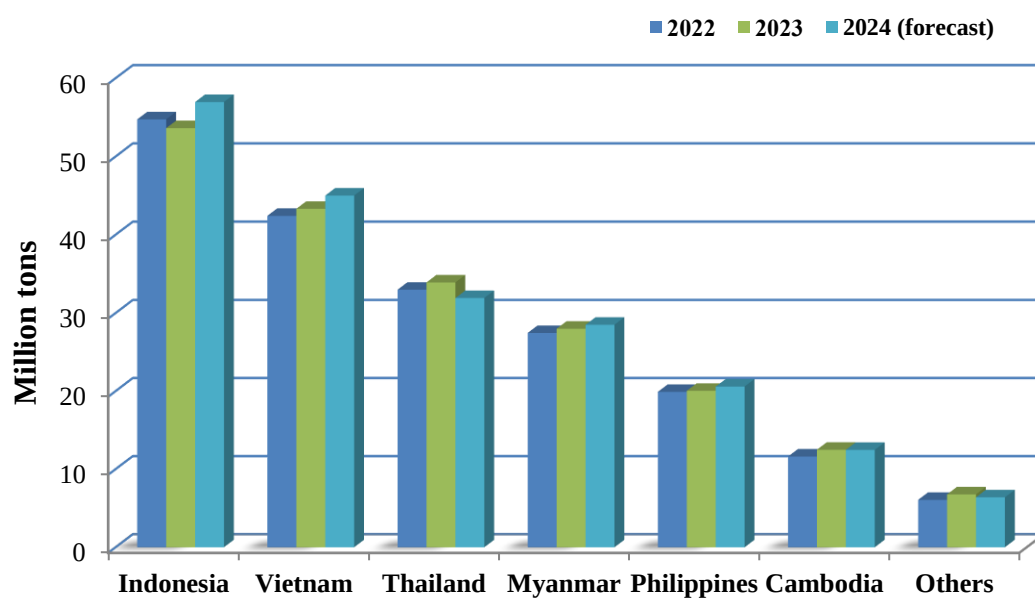


Figure 1 Paddy production of selected countries in ASEAN, 2022 – 2024

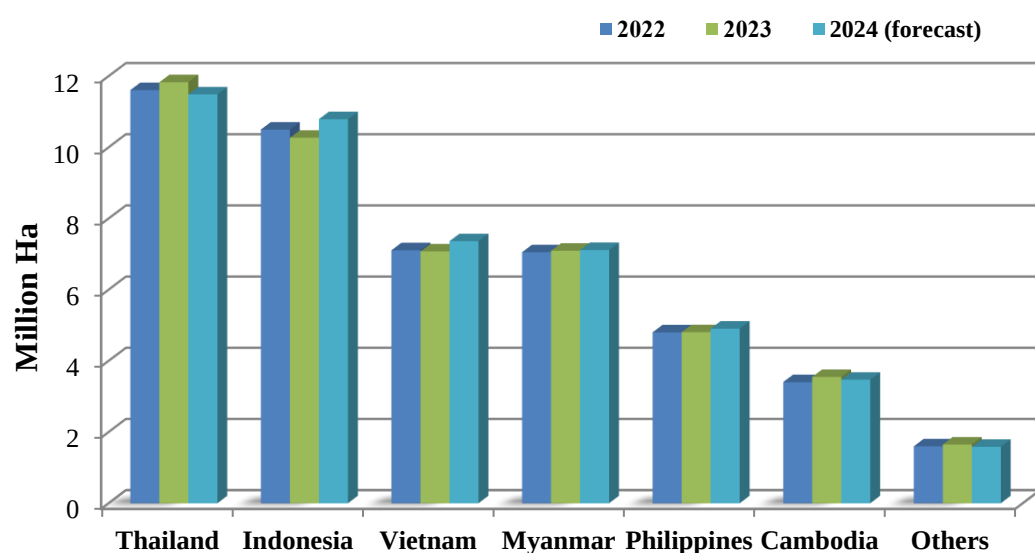


Figure 2 Paddy planted area of selected countries in ASEAN, 2022 – 2024

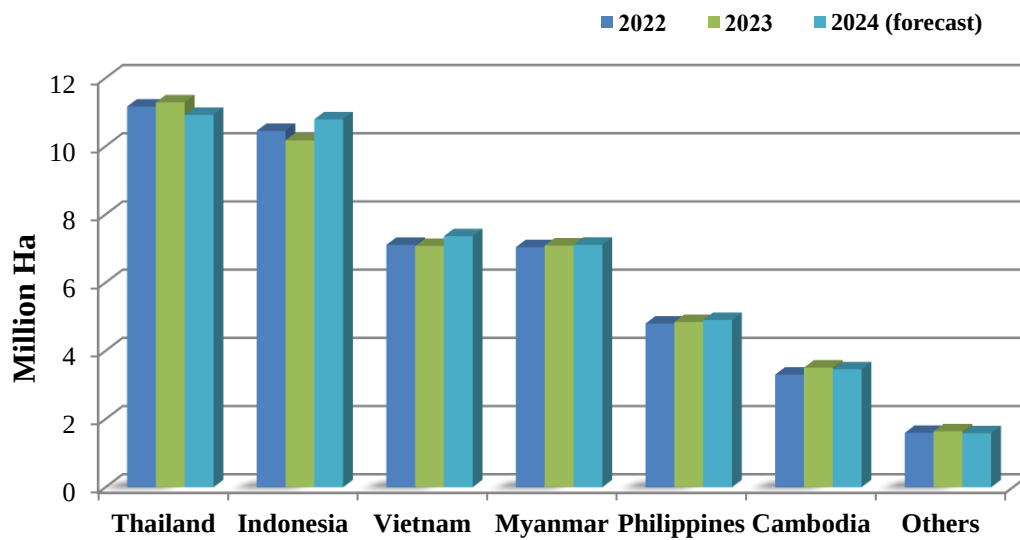


Figure 3 Paddy harvested area of selected countries in ASEAN, 2022 – 2024

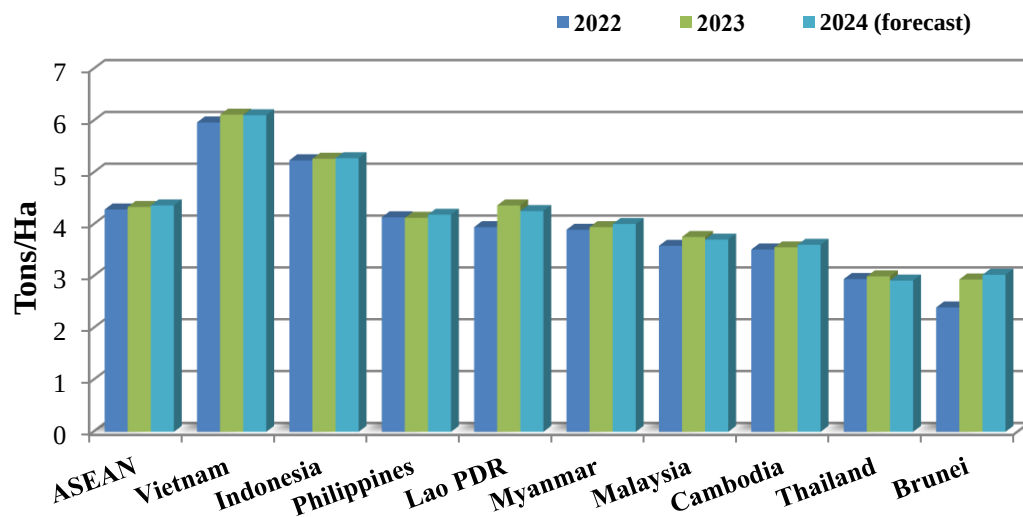


Figure 4 Paddy yield of countries in ASEAN, 2022 – 2024

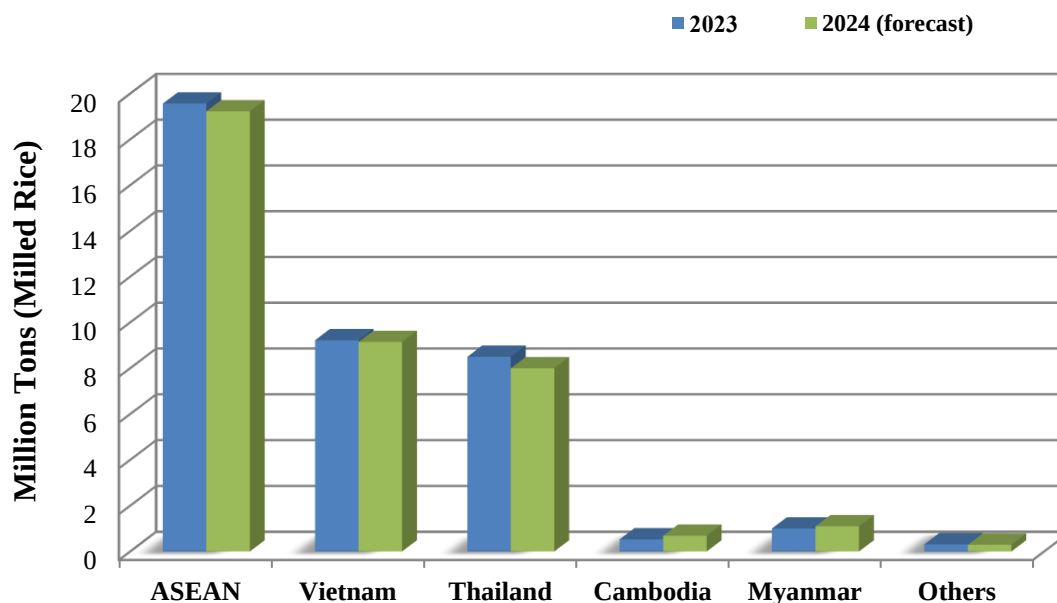
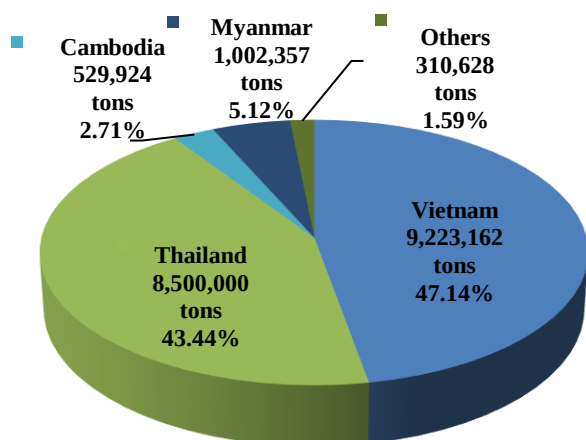
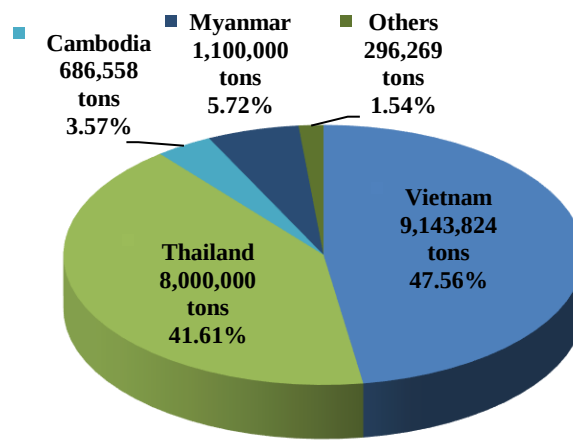


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 19.57 million tons

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



Total 19.23 million tons

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

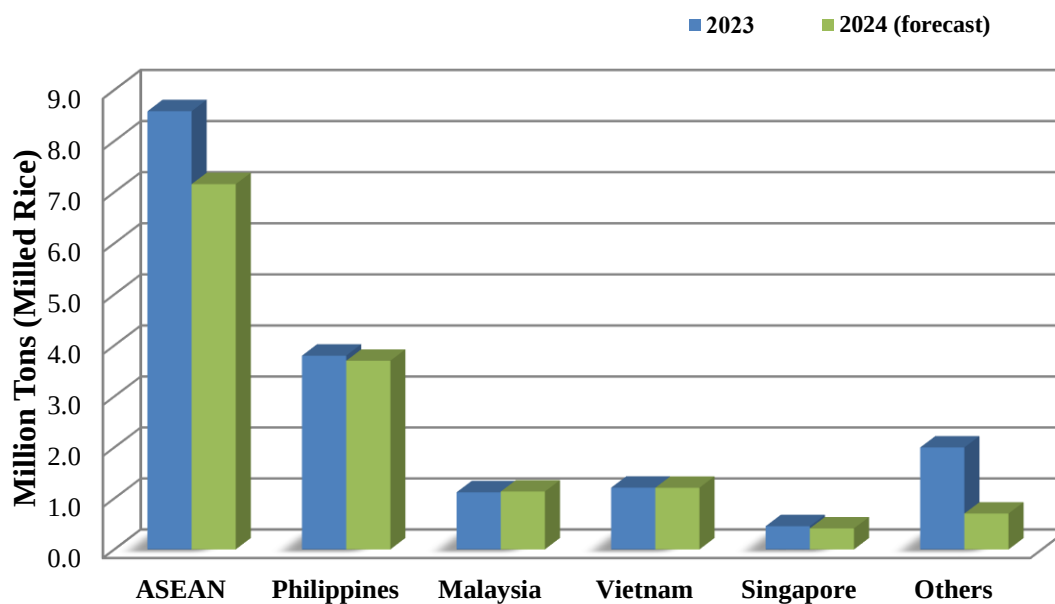
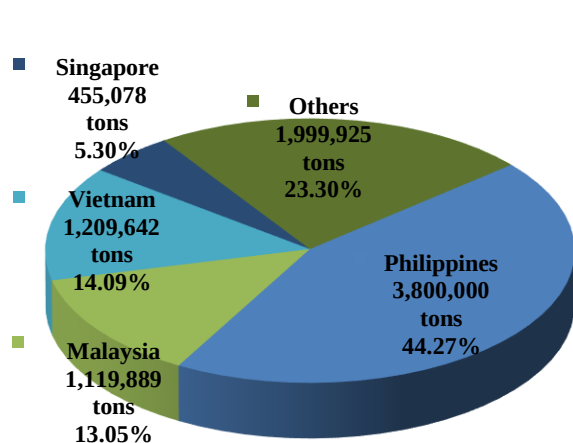
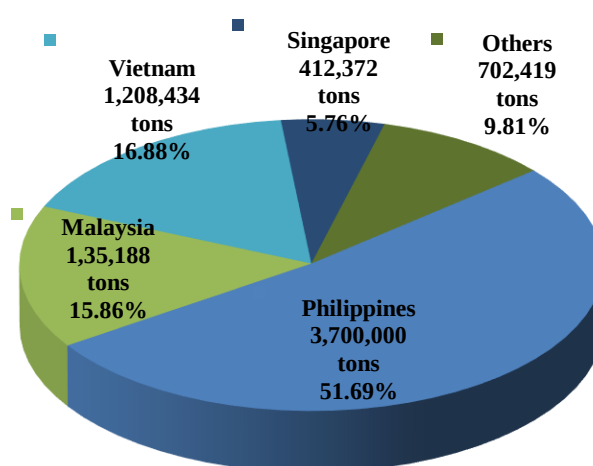


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 8.58 million tons

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



Total 7.16 million tons

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

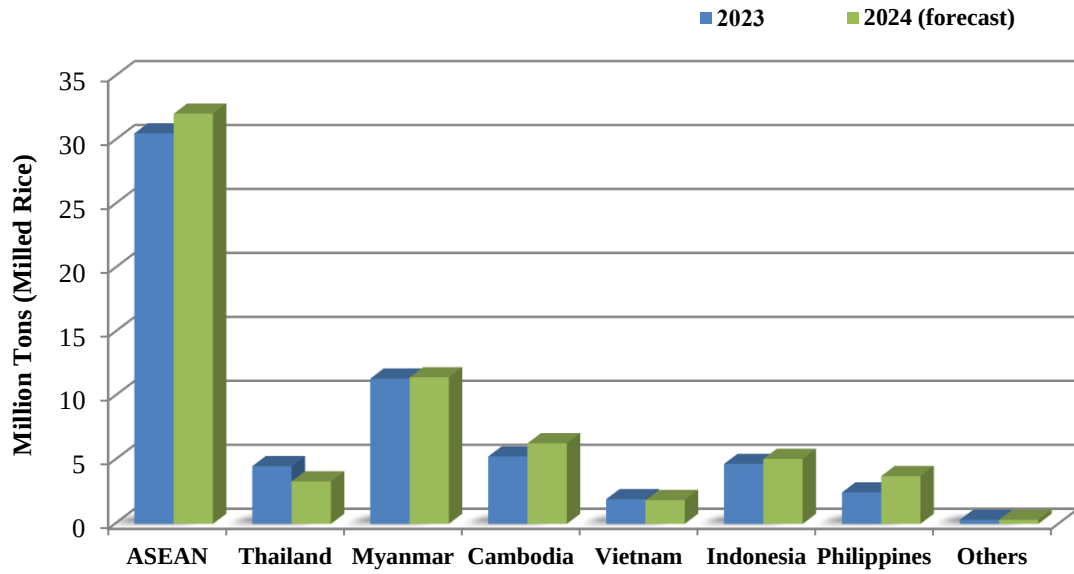


Figure 11 Amount of ending stock of rice in ASEAN countries, 2022– 2024

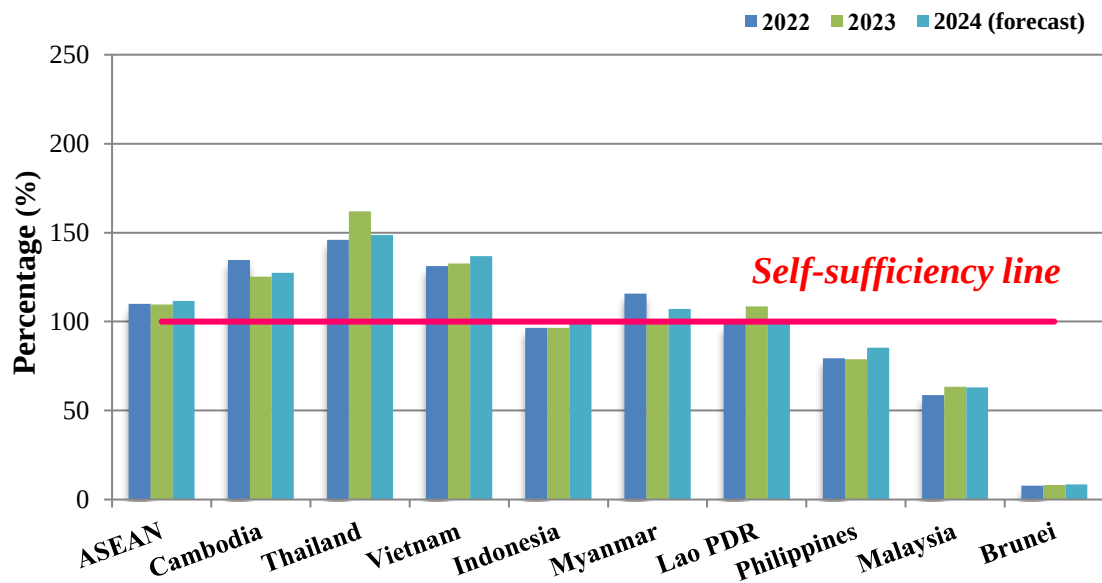


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2022– 2024

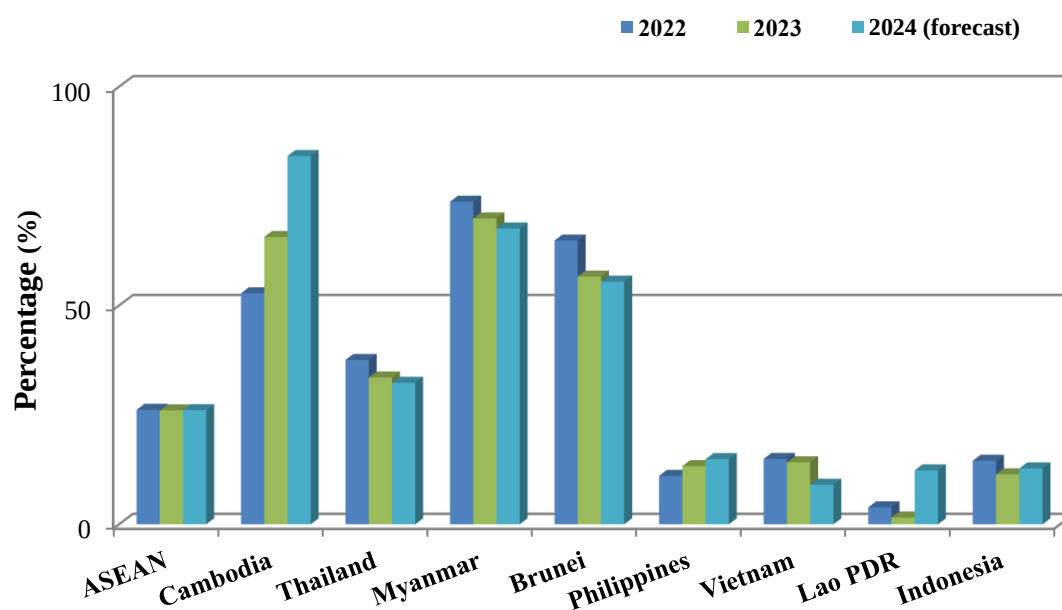


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

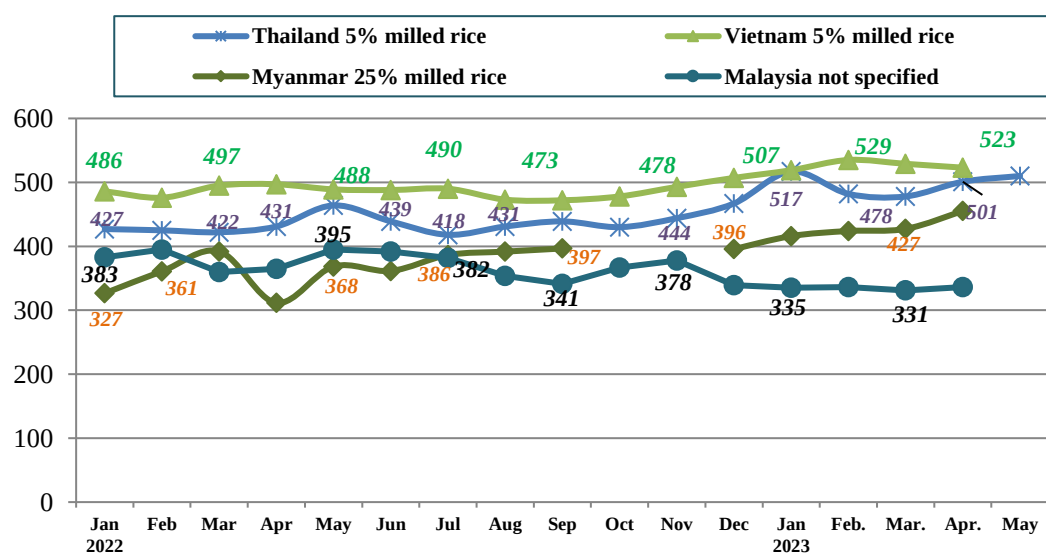


Figure 14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

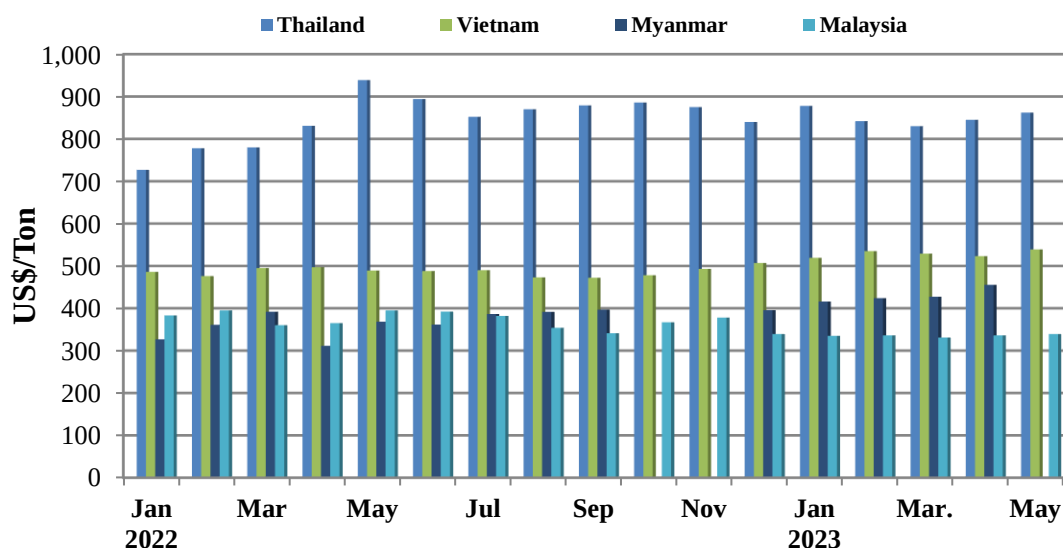


Figure 15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

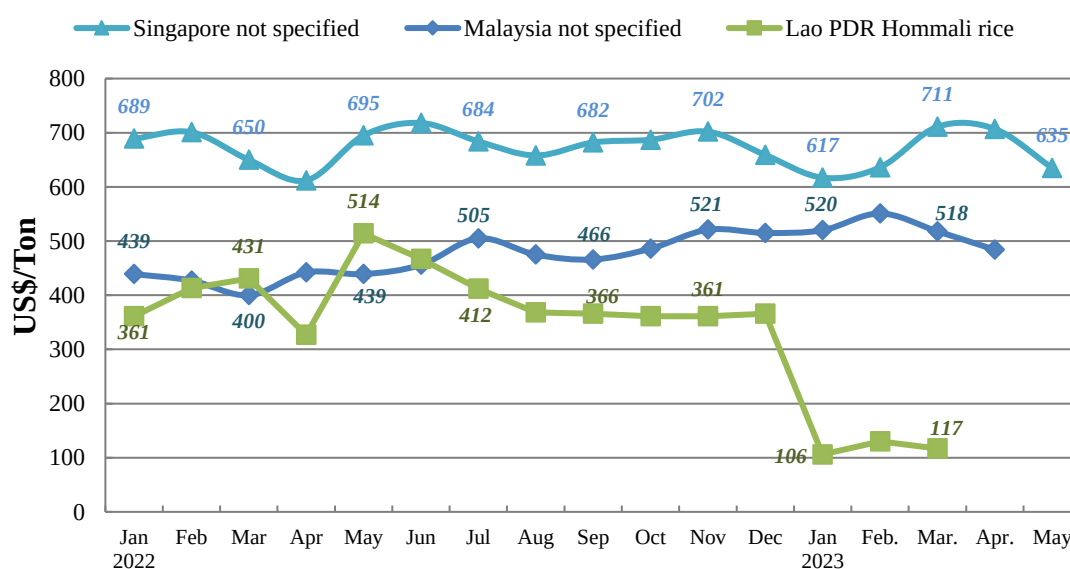


Figure 16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2022 – 2023

Maize Outlook for 2024



The primary drivers behind the rise in ASEAN maize supply are the increase in production. The supply increase 0.33 percent or 0.20 million tons, slightly increase from 59.88 million tons in 2023 to 60.08 million tons in 2024 (Table 16).

The forecast indicates that maize beginning stock is set to decrease by approximately 1.26 million tons or 18.05 percent, decreasing from 6.98 million tons in 2023 to 5.72 million tons in 2024. Conversely, production of maize is increased by 3.55 percent or 1.29 million tons from 36.38 million tons in 2023 to 37.67 million tons in 2024.

The demand of maize in 2024 is expected to increase by approximately 60.08 million tons from 59.88 million tons in 2023. Domestic utilization is predicted to rise by 0.73 million tons, increasing from 51.93 million tons in 2023 to 52.66 million tons in 2024. Additionally, maize exports are projected to decrease by 0.83 million tons or 37.22 percent, down from 2.23 million tons in 2023 to 1.40 million tons in 2024.

The ending stock of maize is expected to slight increase around 5.24 percent from 5.72 million tons in 2023 to 6.02 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to increase by 2.13 percent from 70.05 million tons in 2023 to 71.54 million tons in 2024.

The beginning stock to domestic utilization ratio referred to as the food security ratio, is expected to decrease by approximately 19.14 percent from 13.43 million tons in 2023 to 10.86 million tons in 2024.

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

Unit: Million tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	59.88	60.08	0.20	0.33
Beginning stock	6.98	5.72	-1.26	-18.05
Production	36.38	37.67	1.29	3.55
Import	16.53	16.69	0.16	0.97
Demand (Million tons)	59.88	60.08	0.20	0.33
Domestic utilization	51.93	52.66	0.73	1.41
Export	2.23	1.40	-0.83	-37.22
Ending stock	5.72	6.02	0.30	5.24
Ratio of production to domestic utilization (%)	70.05	71.54	1.49	2.13
Ratio of beginning stock to domestic utilization (%)	13.43	10.86	-2.57	-19.14

ASEAN Maize Situation in 2023

► *Production*

ASEAN maize production in 2023 (crop year 2022/23) estimated at 41.47 million tons, which decreased by 2.49 million tons or 5.67 percent from 43.97 million tons in 2022 (crop year 2021/22). An increase in maize production in 2023 found in Cambodia, Malaysia, Myanmar, Thailand, and Vietnam due to the increase in either planted area and yield. While, the production of Indonesia, Lao PDR, Philippines decreased due to the declining of planted area and yield (Table 17-20, Figure 17-20).

For **Cambodia**, the increase in production was attributed to the rise in planted area, which came by farmers responding to a price increase.

For **Myanmar**, the increase in production was attributed to the rise in yield, which was driven by the use of more improved varieties and better care practices.

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

For Thailand, the maize production was attributed to an expansion in planted areas. This increase in cultivation was a response to farmers substituting maize for cassava in factories that are experiencing a shortage of plant stems. This shift was prompted by factors such as the past year's issues with rotten potatoes, as well as challenges posed by drought and rainy periods affecting the growth of cassava.

For **Vietnam**, the increase in production was attributed to a rise in both planted area and yield. The increase in the planted area was due to farmers responding to a price increase, while the increase in yield was influenced by favorable weather conditions.

For **the Philippines**, the decrease of production was attributed to a reduction in the planted area. This decline in planted areas were influenced by pest issues and reduced fertilizer usage.

For **Indonesia**, the decrease in production was attributed to a decrease in both planted area and yield. The reduction in the planted area was influenced by farmers responding to a price decrease, unfavorable weather, and competition with other commodities. Similarly, the decrease in yield was also caused by unfavorable weather in some parts of Indonesia.

For **Lao PDR**, the decrease of production was due to the decrease in planted area. The decrease in the planted area was a result of farmers responding to a decrease in prices, an increase in the price of competing crops, delayed rainfall, adverse weather conditions such as drought, and high prices of agricultural inputs.

► *Utilization and Stock*

In 2023, maize utilization in ASEAN was estimated at 51.93 million tons, reflecting an increase of 1.29 million tons or 2.56 percent compared to 50.63 million tons in 2022 (Table 22-23). The majority of maize production in ASEAN is dedicated to animal feed. The rise in domestic maize utilization has been observed throughout the entire ASEAN region, with the exception of Singapore.

The beginning stock of maize in ASEAN in 2023 was estimated at 6.97 million tons, which increased by 2.47 million tons from 4.50 million tons in 2022 (Table 22-23).

The ratio of maize production to domestic utilization, for the entire ASEAN region in 2023 was estimated at 70.05 percent, showing a decrease from 75.38 percent in 2022 (Table 25, Figure 28). This suggests that

ASEAN as a whole produced less maize than required for regional consumption. On a country basis, Cambodia, Lao PDR, and Myanmar had ratios above 100 percent, indicating that they produced more maize than needed for their domestic consumption. In contrast, Indonesia, the Philippines, Malaysia, Thailand, and Vietnam had ratios below 100 percent, implying that these countries still needed to import maize to meet their domestic utilization needs.

The ratio of beginning stock to domestic utilization (**food security ratio**) for the ASEAN in 2023 increased to 13.43 percent in 2023 from 8.88 percent in 2022 (Table 26, Figure 29).

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

The Russia-Ukraine war has raised fertilizer prices, notably affecting maize, majorly produced and exported in the world. This directly impacts ASEAN countries, heavily reliant on agriculture for income. High energy prices make agricultural equipment and fertilizer more costly, potentially causing sudden spikes in production costs. Maize-producing nations in ASEAN may face shortages, posing a risk to future food security.

► **Trade**

In 2023, ASEAN exported 2.23 million tons of maize, while importing 16.53 million tons (Table 23, Figure 21-22,

24-25). Myanmar, the largest exporter in ASEAN, was contributed 81.40 percent of the total maize exports, amounting to 1.82 million tons (Table 23, Figure 21-22).

The primary importing countries in the region include Vietnam, Thailand, Malaysia, Indonesia, the Philippines, and Singapore (Table 23, Figure 24-25). Detailed information regarding the quantity and value of maize exported by destination countries and the quantity and value of maize imported by origin countries could found in Table 27-28.

► **Prices**

The monthly FOB prices for maize exporting countries and CIF prices for importing countries of 2022 and 2023 are shown in Table 29-30 and Figure 30-31. The annual average of Indonesia FOB prices in 2023 was 579 US\$/tons, which increase from 521 US\$/tons as the yearly average in 2022.

For Lao PDR, Myanmar, and Thailand, average FOB prices of 2023 were 138, 229 and 350 US\$/tons, respectively. The average CIF prices in 2023 in Indonesia, Singapore and Vietnam were 324, 1,539 and 312 respectively.

► **Damaged Area**

The damaged area of maize in 2023 is estimated to be 9,859 hectares, of which 7,943 hectares were caused by drought. The most affected areas were caused by flood, drought and pest which occurred in Indonesia while the damage area of Myanmar was caused by flood (Table 21).

Prospects for Maize in 2024

► *Production*

Maize production in ASEAN in 2024 (crop year 2023/24) was estimated at 43.19 million tons from 41.47 million tons in 2023. The increase has occurred in all ASEAN countries, except Thailand. The most increase in terms of quantity was found in Indonesia at approximately 20.80 million tons (Table 17).

For **Indonesia**, the increase in production is attributed to the rise in planted area. For the increase in planted area was caused by farmers responding to a price increase, favorable weather, government policy, and special assistance.

For **Lao PDR**, the increase of production is attributed to the increase in planted area and yield. The increase in planted area is attributed to farmers responding to price increases, a decrease in the price of competing crops, government policies, and the increase in yield is linked to favorable weather conditions and improved care practices.

For **Vietnam**, the increase in production is attributed to the increase in planted and harvested areas, which was caused by farmers' response to maize price increases.

For **Thailand**, the decrease of production is attributed to the decrease in planted area. The decrease in planted area is attributed to the impact of the El Niño phenomenon since 2023 has led to prolonged

drought conditions in the affected areas. This extended period of reduced rainfall, coupled with higher temperatures, has resulted in adverse effects on agriculture.

► *Utilization and Stock*

The domestic utilization of maize in ASEAN is forecasted to be 52.66 million tons in 2024 from 51.93 million tons in 2023 (Table 23-24). The estimated beginning stock for 2024 is 5.71 million tons, which is down by 1.25 million tons from 6.97 million tons in 2023.

In 2024, the ratio of production to domestic utilization (**self-sufficient ratio**) is expected to increase to 71.54 percent in 2024 from 70.05 percent in 2023 (Table 25, Figure 28), while the ratio of beginning stock to domestic utilization ratio (**food security ratio**) in 2024 is expected to be 10.86 percent, which decreases from 13.43 percent in 2023 (Table 26, Figure 29).

► *Trade*

The maize export from ASEAN is expected to decrease to 1.40 million tons in 2024 from 2.23 million tons in 2023. Concurrently, the forecast for maize imports by ASEAN in 2024 is 16.69 million tons, an increase from the 16.53 million tons imported in 2023 (Table 23-24, Figure 21, 23, 24, and 26).

Table 17 Maize production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	43,971.52	41,477.20	-2,494.31	-5.67	43,188.34	1,711.14	4.13
Brunei	N/A						
Cambodia	1,227.60	1,375.76	148.16	12.07	1,389.51	13.76	1.00
Indonesia	22,356.75	19,561.13	-2,795.63	-12.50	20,805.99	1,244.86	6.36
Lao PDR	476.59	366.30	-110.29	-23.14	656.59	290.30	79.25
Malaysia	60.00	80.00	20.00	33.33	100.00	20.00	25.00
Myanmar	2,311.35	2,341.12	29.77	1.29	2,360.01	18.89	0.81
Philippines	8,344.02	8,322.27	-21.75	-0.26	8,412.84	90.57	1.09
Singapore	N/A						
Thailand	4,772.03	4,876.63	104.60	2.19	4,861.39	-15.24	-0.31
Vietnam	4,423.18	4,554.00	130.82	2.96	4,602.00	48.00	1.05

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	8,192.78	7,907.93	-284.85	-3.48	8,337.92	429.99	5.44
Brunei	N/A						
Cambodia	216.39	259.30	42.91	19.83	261.89	2.59	1.00
Indonesia	2,774.07	2,496.23	-277.84	-10.02	2,863.97	367.73	14.73
Lao PDR	92.76	71.25	-21.51	-23.19	140.90	69.65	97.77
Malaysia	11.00	11.29	0.29	2.64	11.44	0.15	1.33
Myanmar	607.66	601.26	-6.39	-1.05	600.30	-0.97	-0.16
Philippines	2,562.13	2,475.86	-86.27	-3.37	2,467.03	-8.83	-0.36
Singapore	N/A						
Thailand	1,041.75	1,092.74	51.00	4.90	1,082.40	-10.34	-0.95
Vietnam	887.03	900.00	12.97	1.46	910.00	10.00	1.11

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	8,171.19	7,884.76	-286.43	-3.51	8,325.93	441.18	5.60
Brunei	N/A						
Cambodia	211.01	259.30	48.28	22.88	261.89	2.59	1.00
Indonesia	2,764.07	2,487.19	-276.88	-10.02	2,863.97	376.77	15.15
Lao PDR	92.76	71.25	-21.51	-23.19	140.90	69.65	97.77
Malaysia	11.00	11.29	0.29	2.64	11.44	0.15	1.33
Myanmar	606.19	600.42	-5.76	-0.95	598.88	-1.54	-0.26
Philippines	2,562.13	2,475.86	-86.27	-3.37	2,467.03	-8.83	-0.36
Singapore	N/A						
Thailand	1,037.00	1,079.45	42.45	4.09	1,071.83	-7.63	-0.71
Vietnam	887.03	900.00	12.97	1.46	910.00	10.00	1.11

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

Table 20 Maize yield in ASEAN countries, 2022 – 2024

Unit: Tons/Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	5.38	5.26	-0.12	-2.23	5.19	-0.07	-1.33
Brunei	N/A						
Cambodia	5.82	5.31	-0.51	-8.76	5.31	0.00	0.00
Indonesia	8.09	7.86	-0.23	-2.84	7.26	-0.60	-7.63
Lao PDR	5.14	5.14	0.00	0.00	4.66	-0.48	-9.34
Malaysia	5.45	7.09	1.64	30.09	8.74	1.65	23.27
Myanmar	3.81	3.90	0.09	2.36	3.94	0.04	1.03
Philippines	3.26	3.36	0.10	3.07	3.41	0.05	1.49
Singapore	N/A						
Thailand	4.60	4.52	-0.08	-1.74	4.54	0.02	0.44
Vietnam	4.99	5.06	0.07	1.40	5.06	0.00	0.00

Remark: N/A refers to data that is not available.**Table 21 Maize damaged area in ASEAN by cause of damage, 2023**

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	1,893	7,943	23	-	-	-	9,859
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	1,054	7,943	23	-	-	-	9,020
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	839	-	-	-	-	-	839
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

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

Table 22 Maize balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	4,496,770	38,172,347	16,736,405	59,404,940	50,637,359	1,792,228	6,975,936	59,405,522
Brunei	N/A							
Cambodia	*137,250	1,227,599		1,364,849	720,561	173,999	470,289	1,364,849
Indonesia	720,123	16,527,273	1,082,236	18,329,632	15,397,288	161,921	2,770,423	18,329,632
Lao PDR	139,933	476,589	7,787	624,309	530,662	49,541	44,105	624,309
Malaysia		*60,000	1,797,112	1,857,112	*1,855,295	1,817		1,857,112
Myanmar	*2,072,858	2,341,120	12,818	4,426,796	946,729	1,258,658	2,221,408	4,426,796
Philippines	507,000	*8,344,016	926,000	9,777,017	9,276,000	3,000	498,017	9,777,017
Singapore			5,796	5,796	5,720	76		5,796
Thailand	186,133	4,772,029	*3,300,000	8,258,162	8,107,416	*1,500	149,246	8,258,162
Vietnam	733,473	4,423,180	9,604,614	14,761,267	13,797,103	141,715	822,448	14,761,267

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

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	6,975,936	36,377,215	16,529,574	59,882,725	51,933,069	2,232,554	5,717,103	59,882,725
Brunei	N/A							
Cambodia	470,289	1,375,757		1,846,046	872,255	65,498	908,293	1,846,046
Indonesia	2,770,423	14,460,601	944,789	18,175,813	16,074,766	137,620	1,963,427	18,175,813
Lao PDR	44,105	366,297	1,812	412,214	350,382	57,941	3,891	412,214
Malaysia		*80,000	*1,780,000	1,860,000	*1,859,142	858		1,860,000
Myanmar	2,221,408	2,341,120	5,617	4,568,145	1,211,362	1,817,214	1,539,569	4,568,145
Philippines	498,017	*8,322,271	*1,000,000	9,820,288	*9,300,000	*3,000	517,288	9,820,288
Singapore			1,583	1,583	1,482	101		1,583
Thailand	149,246	4,876,630	*3,500,000	8,525,876	8,372,005	*1,500	152,371	8,525,876
Vietnam	822,448	4,554,000	9,295,729	14,672,178	13,891,093	148,821	632,264	14,672,178

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

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,717,103	37,671,941	16,689,150	60,078,194	52,659,802	1,401,667	6,016,724	60,078,194
Brunei	N/A							
Cambodia	908,293	1,389,513		2,297,806	787,581	75,009	1,435,216	2,297,806
Indonesia	1,963,427	15,381,867	1,004,691	18,349,985	16,322,626	100,677	1,926,682	18,349,985
Lao PDR	3,891	656,594		660,485	561,412		99,073	660,485
Malaysia		*100,000	*1,770,000	1,870,000	*1,868,000	*2,000		1,870,000
Myanmar	1,539,569	2,360,008		3,899,577	*1,325,228	*1,090,181	1,484,168	3,899,577
Philippines	517,288	*8,320,000	*1,000,000	9,837,288	*8,951,000	*3,000	*883,288	9,837,288
Singapore			3,689	3,689	3,601	88		3,689
Thailand	152,371	4,861,393	*4,000,000	9,013,764	*8,905,610	*1,000	107,154	9,013,764
Vietnam	632,264	4,602,000	8,910,724	14,144,988	13,934,132	129,712	81,143	14,144,988

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	38,172,347	50,637,359	75.38	36,377,215	51,933,069	70.05	37,671,941	52,659,802	71.54
Brunei	N/A								
Cambodia	1,227,599	720,561	170.37	1,375,757	872,255	157.72	1,389,513	787,581	176.43
Indonesia	16,527,273	15,397,288	107.34	14,460,601	16,074,766	89.96	15,381,867	16,322,626	94.24
Lao PDR	476,589	530,662	89.81	366,297	350,382	104.54	656,594	561,412	116.95
Malaysia	60,000	1,855,295	3.23	80,000	1,859,142	4.30	100,000	1,868,000	5.35
Myanmar	2,341,120	946,729	247.29	2,341,120	1,211,362	193.26	2,360,008	1,325,228	178.08
Philippines	8,344,017	9,276,000	89.95	8,322,271	9,300,000	89.49	8,320,000	8,951,000	92.95
Singapore	-	5,720	0.00	-	1,482	0.00	-	3,601	0.00
Thailand	4,772,029	8,107,416	58.86	4,876,630	8,372,005	58.25	4,861,393	8,905,610	54.59
Vietnam	4,423,180	13,797,103	32.06	4,554,000	13,891,093	32.78	4,602,000	13,934,132	33.03

Remark: * The value is estimated by AFSIS Secretariat, N/A refers to data that is not available.**Table 26 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2022 – 2024**

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	4,496,770	50,637,359	8.88	6,975,936	51,933,069	13.43	5,717,103	52,659,802	10.86
Brunei	N/A								
Cambodia	137,250	720,561	19.05	470,289	872,255	53.92	908,293	787,581	115.33
Indonesia	720,123	15,397,288	4.68	2,770,423	16,074,766	17.23	1,963,427	16,322,626	12.03
Lao PDR	139,933	530,662	26.37	44,105	350,382	12.59	3,891	561,412	0.69
Malaysia	-	1,855,295	-	-0	1,859,142	-	-0	1,868,000	-
Myanmar	2,072,858	946,729	218.95	2,221,408	1,211,362	183.38	1,539,569	1,325,228	116.17
Philippines	507,000	9,276,000	5.47	498,017	9,300,000	5.36	517,288	8,951,000	5.78
Singapore	-	5,720	-	-	1,482	-	-	3,601	-
Thailand	186,133	8,107,416	2.30	149,246	8,372,005	1.78	152,371	8,905,610	1.71
Vietnam	733,473	13,797,103	5.32	822,448	13,891,093	5.92	632,264	13,934,132	4.54

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

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

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									24	11,808			90,800	28,314,955
Lao PDR														
Malaysia	1.54	5,942			177	60,853								
Myanmar													31,280	8,784,000
Philippines					0.35	4,423								
Singapore														
Thailand					140	2,100,683								
Vietnam				15,936,941				1,524,767						64,208,792

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	325	245,843					91,149	28,572,606	422	106,503	91,570	28,679,110
Lao PDR			41,351	9,198,579	16,590	2,712,158	57,941	11,910,738			57,941	11,910,738
Malaysia	584	223,542			12	12,722	774	303,059	84	57,474	858	360,533
Myanmar	69	19,000	675,133	205,212,000			706,481	214,015,000	32,975	9,194,000	739,456	223,209,000
Philippines			0.01	32	1,269	3,907,505	1,270	3,911,960	7.61	7,084	1,277	3,919,044
Singapore									832	1,717,325	832	1,717,325
Thailand							140	2,100,683	0.72	304,990	141	2,405,673
Vietnam		2,300						81,672,800		2,503,206		84,176,006

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

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

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia														
Lao PDR														
Malaysia					0.48	7,778							19	4,041
Myanmar														
Philippines					98,501	34,269,683					57,286	18,996,145		
Singapore			7.43	47,283	449	470,825			253	419,498	0.10	84	1.08	880
Thailand			35,813	205,321,877			95,100	828,569,063			1,200,707	14,155,690,539		
Vietnam			100	30,000			72,959	25,362,361						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia									660,580	210,963,790	660,580	210,963,790
Lao PDR			1,324	2,726,703	486	633,019	1,810	3,359,722			1,810	3,359,722
Malaysia	7.75	14,688	364	495,803			391	522,310	815,441	259,546,830	815,832	260,069,141
Myanmar			420	2,110,000			420	2,110,000	600	2,370,000	1,020	4,480,000
Philippines			89.38	1,055,814	145,646	52,725,259	301,522	107,046,901	225,791	73,326,639	527,313	180,373,540
Singapore			38	86,659	2.09	8,149	751	1,033,378	832	1,717,325	1,583	2,750,703
Thailand							1,331,620	15,189,581,479			1,331,620	15,189,581,479
Vietnam			6,210	19,401,862			79,269	44,794,223	79,269	2,315,118,619	7,746,441	2,359,912,842

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

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

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	657	650	719	623	673	631	391	668	329	324	295	297	521
	2023	305	308	326	338	686	733	835	843	841				579
Lao PDR	2022	244	225	217	208	219	230	200	200	200	184	188	198	209
	2023	125	152	182	147	123	128	121	144	120				138
Myanmar	2022	227	246	218	312	312	312	346	334	300	262	289	295	288
	2023	302	319	319	310	309	308	297	288	277	264			299
Thailand	2022	329	343	385	386	388	378	347	338	322	326	343	356	353
	2023	407	403	375	381	380	367	347	338	318	301	284	298	350

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

Unit: US\$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	342	334	313	331	392	391	392	367	329	369	332	344	353
	2023	337	348	347	336	343	341	303	297	260				324
Singapore	2022	488	639	461	355	557	643	1,073	1,110	1,202	1,056	1,345	1,340	856
	2023	1,236	1,480	1,023	1,243	1,426	1,180	1,580	1,110	963	2,409	2,409	2,409	1,539
Vietnam	2022	320	323	336	361	378	384	380	363	345	325	330	333	348
	2023	335	338	340	341	329	310	296	289	274	266			312

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

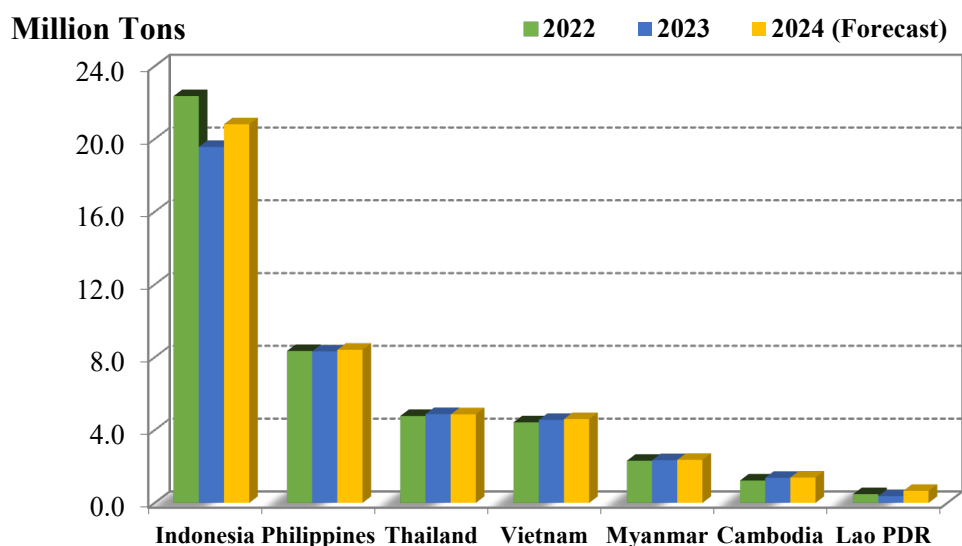


Figure 17 Maize production of selected countries in ASEAN, 2022 – 2024

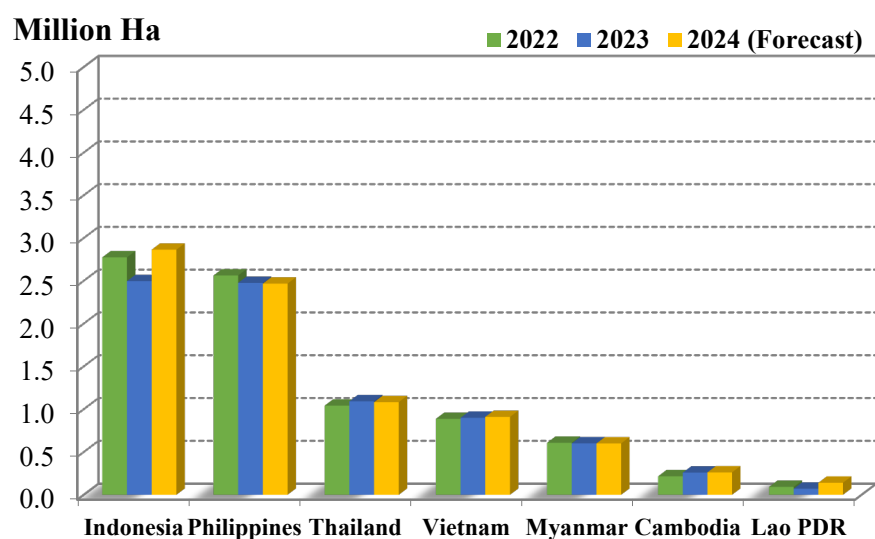


Figure 18 Maize planted area of selected countries in ASEAN, 2022 – 2024

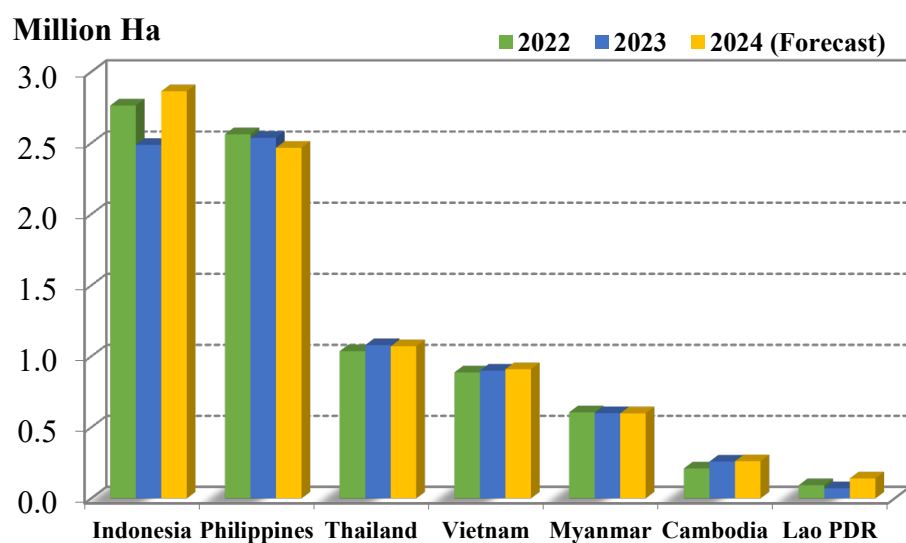


Figure 19 Maize harvested area of selected countries in ASEAN, 2022 – 2024

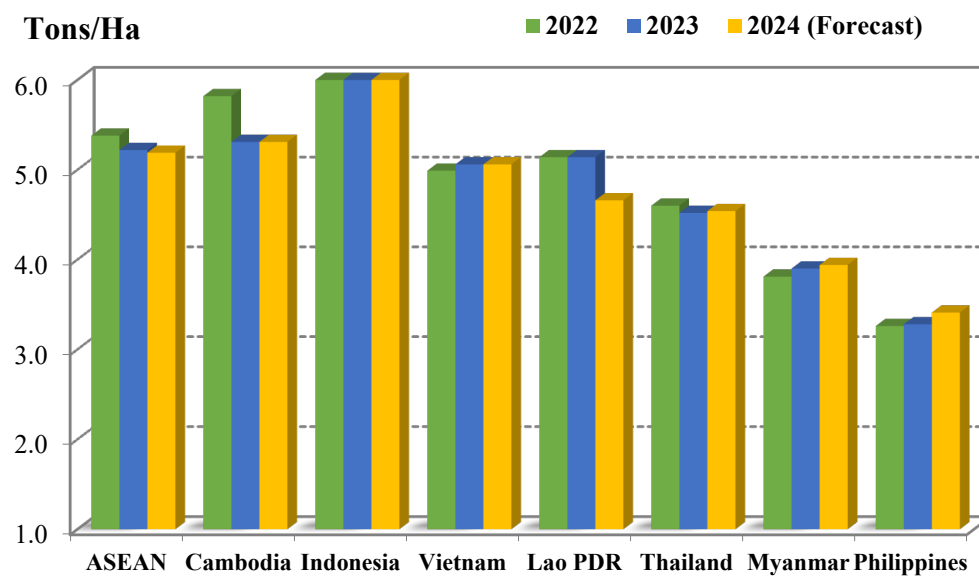


Figure 20 Maize yield of countries in ASEAN, 2022 – 2024

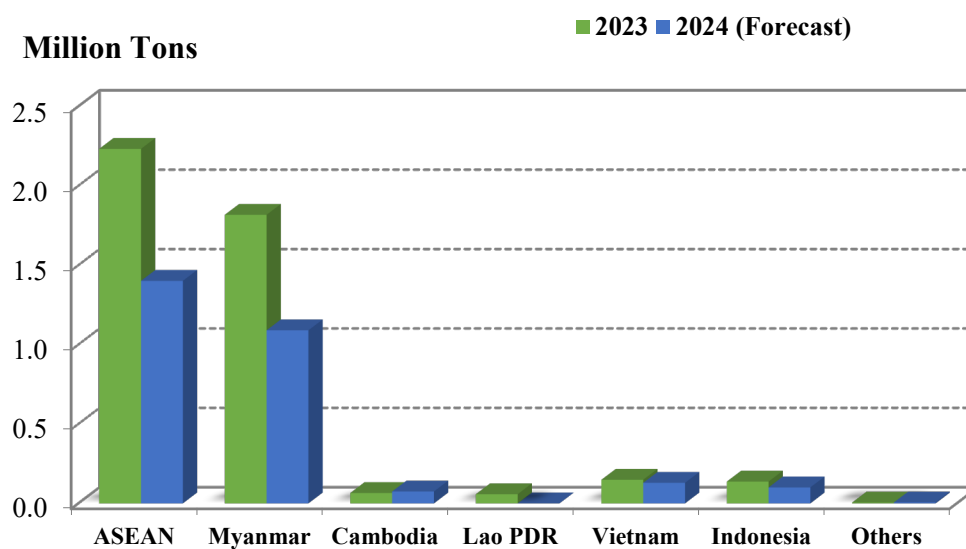
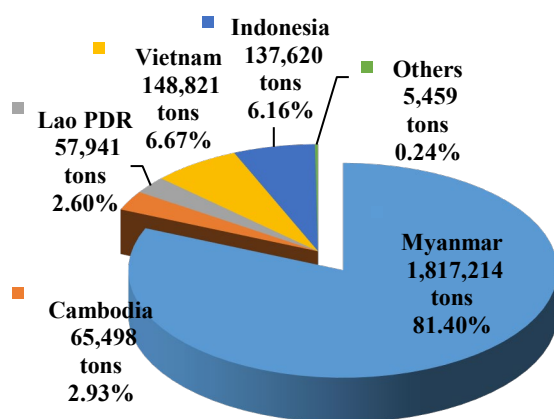
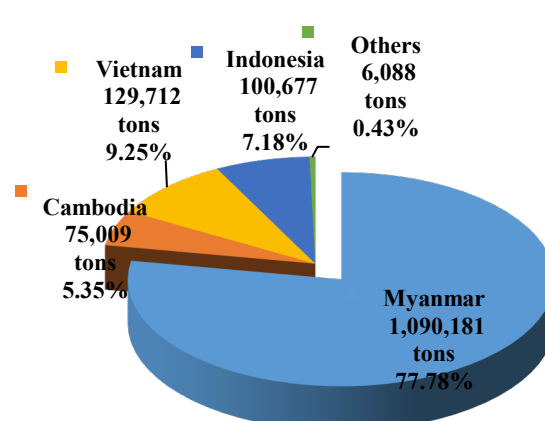


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2023– 2024



Total 2.23 million tons
Figure 22 Share of maize export (tons) among ASEAN countries, 2023



Total 1.40 million tons
Figure 23 Share of maize export (tons) among ASEAN countries, 2024

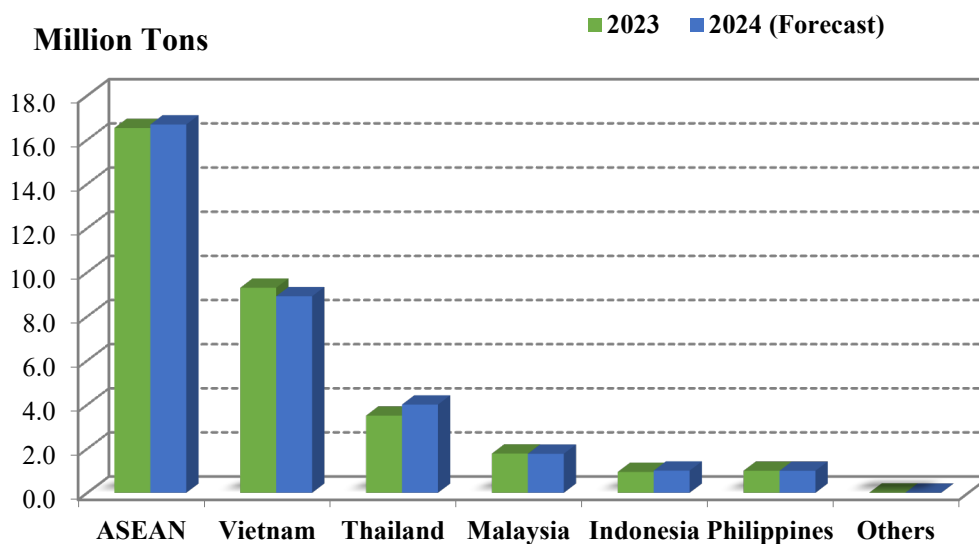
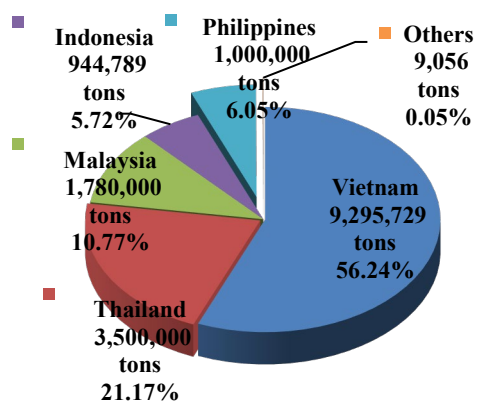
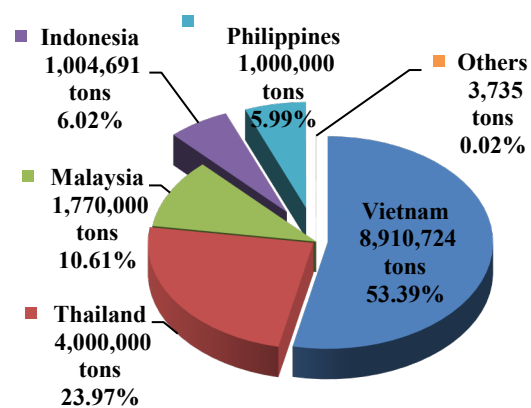


Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2023– 2024



Total 16.53 million tons

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



Total 16.69 million tons

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

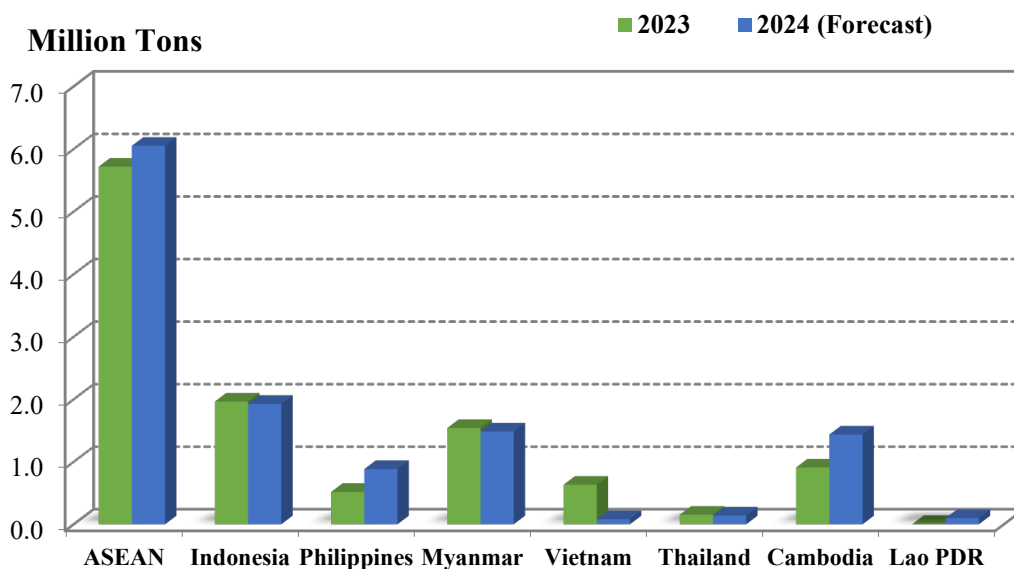


Figure 27 Amount of ending stock of maize in ASEAN countries in 2023 – 2024

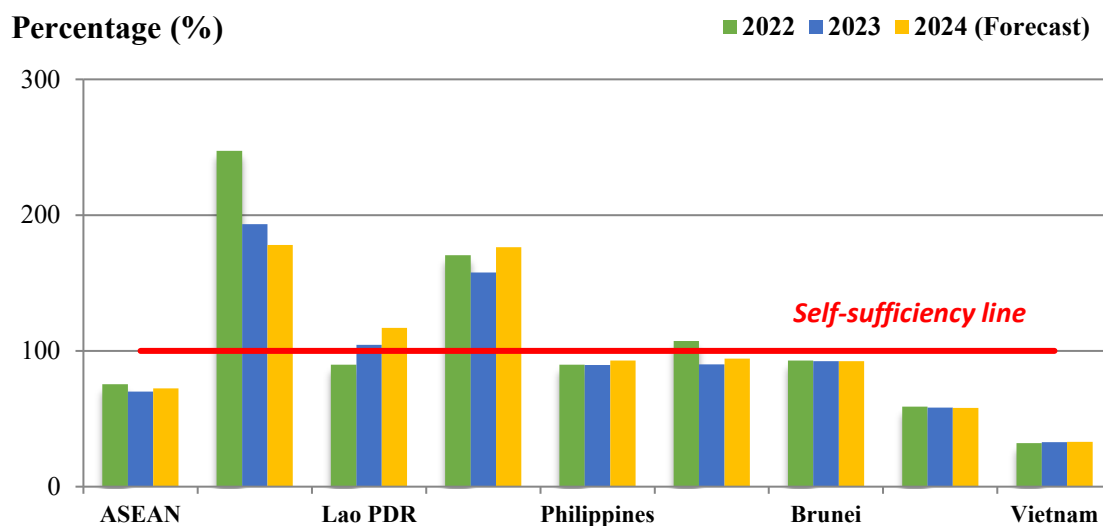


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2022 – 2024

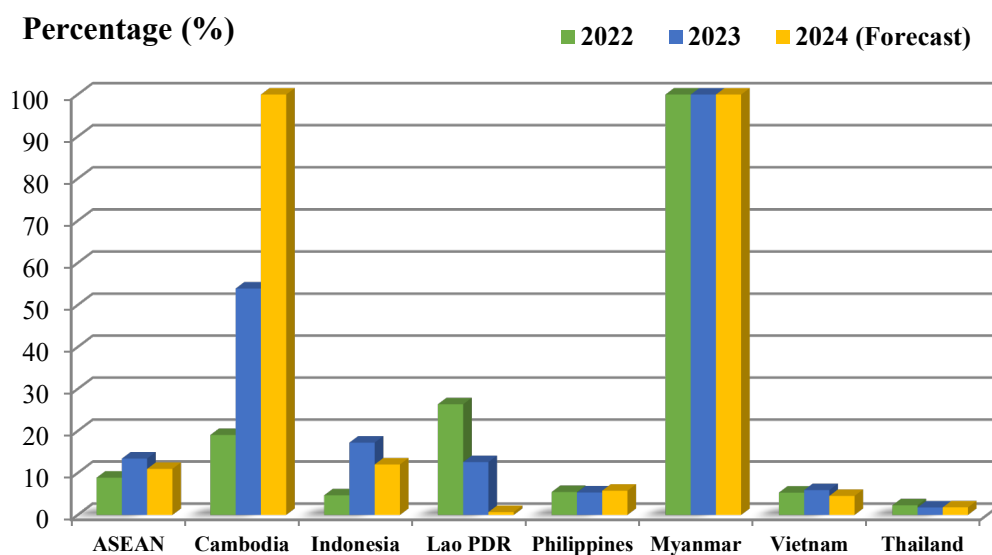


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

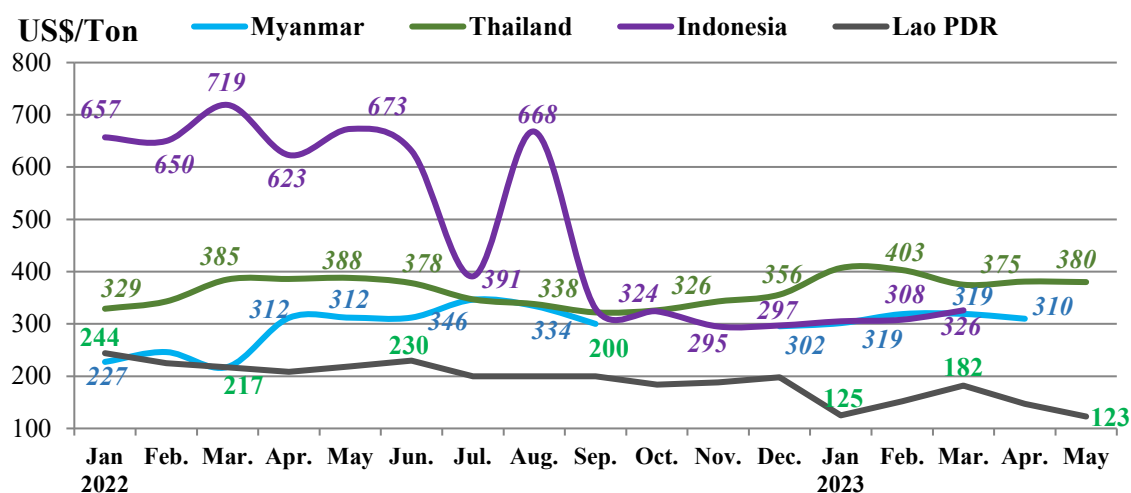


Figure 30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2022 – 2023

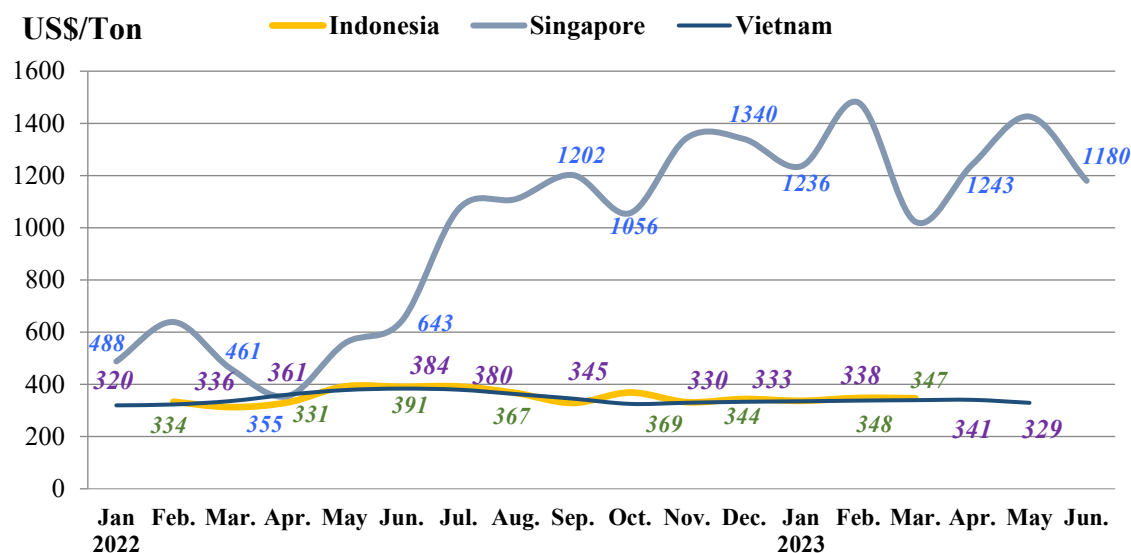


Figure 31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2022– 2023

Sugar Outlook for 2024



ASEAN sugar supply is forecast to increase by approximately 1.31 percent or 0.46 million tons from 35.18 million tons in 2023 to 35.64 million tons in 2024, especially with the increase in beginning stock (Table 31).

The beginning stock of sugar in 2024 is estimated at 11.92 million tons, which increases from 8.80 million tons in 2023.

The sugar production in 2024 is estimated at 14.25 million tons, which decreases from 17.28 million tons in 2023.

The sugar's import of 2024 is forecasted to be 9.46 million tons, which increases around 3.84 percent from 9.11 million tons in 2023.

The export of sugar from ASEAN in 2024 is expected to increase from 7.42 million tons in 2023 to 8.99 million tons in 2024.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2024 is forecasted to be 86.28 percent, which decreases from 109.09 percent in 2023.

The beginning stock to domestic utilization ratio (food security ratio) in 2024 is forecasted to be 72.22 percent, which increases from 55.56 percent in 2023.

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

Unit: Million Tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	35.18	35.64	0.46	1.31
Beginning stock	8.80	11.92	3.12	35.45
Production	17.28	14.25	-3.03	-17.53
Import	9.11	9.46	0.35	3.84
Demand (Million tons)	35.18	35.64	0.46	1.31
Domestic utilization	15.84	16.52	0.68	4.29
Export	7.42	8.99	1.57	21.16
Ending stock	11.92	10.13	-1.79	-15.02
Ratio of production to domestic utilization (%)	109.09	86.28	-22.81	-20.91
Ratio of beginning stock to domestic utilization (%)	55.56	72.22	16.66	29.99

ASEAN Sugar Situation in 2023

► *Production*

Sugarcane production in ASEAN in 2023 (2022/23 crop year) was estimated at 167.17 million tons, decreased 3.87 million tons from 171.04 million tons in 2022 or 2.26 percent (Table 32, Figure 32) include Indonesia, Lao PDR, Myanmar and Philippines. On the other hand, the increase in production occurred in Cambodia, Thailand and Vietnam.

For **Cambodia**, the increase in production was attributed to the rise in yields. This increase in yield was due to favorable weather, the use of more improved varieties, increased fertilizer application, and better care practices.

For **Thailand**, the increase was due to the increase in planted area. The increase in planted area is driven by high sugarcane prices and favorable returns, encouraging farmers to not only sustain but also expand their sugarcane cultivation. Additionally, the government's policy supports sugarcane farmers in cutting fresh sugarcane to enhance their income, compared to cutting burnt sugarcane.

For **Vietnam**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was due to farmers responding to a price increase, while the increase in yield was influenced by the use of more fertilizer.

For **Indonesia**, the decrease in production was attributed to a decrease in planted area, caused by the influence of El Niño.

For **Philippines**, the decrease of production was attributed to a reduction in the yield. This decline in yield resulted from using less fertilizer due to high costs, and the first and second ratoon resulted in smaller canes.

For **Myanmar**, the decrease in production was attributed to the reduction in planted area, driven by the increase in the price of agricultural inputs such as seed cane and fertilizers.

For **Lao PDR**, the decrease of production was attributed to a reduction in the planted area. The decline in planted area resulted from unfavorable weather conditions.

► *Utilization and Stock*

The domestic utilization of sugar in the ASEAN, it has decreased to 15.83 million tons in 2023 from 17.63 million tons in 2022 (Table 37-38). The beginning stock of sugar in ASEAN in 2023 was estimated at 9.14 million tons, which significantly increased from 7.48 million in 2022. The ending stock of sugar in ASEAN in 2023 was estimated to be 12.27 million tons compared to 9.14 million tons in 2022.

The ratio of sugar production to domestic utilization (**self-sufficient ratio**) in 2023 was estimated to be 109.09 percent compare to 2022 by 96.11 percent. **This indicated that the ASEAN itself produced adequate sugar for the regional consumption** (Table 40, Figure 43). Moreover, on the country-by-country basis, sugar production in Cambodia, Thailand and Philippines exceeds the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (**food security ratio**) was estimated to be 57.72 percent in 2023, compared to 42.46 percent in 2022. **This indicated that the sugar availability in the region was increase from the previous year** (Table 41, Figure 44).

Overall, despite sugar production in ASEAN decreased, the production volume was sufficient for consumption within the ASEAN region. However, many ASEAN countries still rely on sugar import

from aboard. Even through sugar may not be a staple food for the ASEAN region, it is an important ingredient used in many kinds of food, especially in the desserts industry.

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

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

► **Trade**

The sugar's export from ASEAN in 2023 was 7.42 million tons, which decreased compared to 7.74 million tons in 2022 or 4.13 percent (Table 37-38, Figure 36-37). For the import, ASEAN in 2023 as a whole imported sugar around 9.11 million tons decreasing compare to 10.08 million tons in 2022 (Table 37-38, Figure 39-40).

The quantity and value of sugar export by countries of destination and the quantity and value of import by countries of origin are given in Tables 42 and 43, respectively.

► **Prices**

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2022-2023 are shown in Tables 44-45. The annual average of Thailand FOB prices in 2023 (January-December) of raw sugar estimated by 471 US\$/tons and white sugar estimated by 611 US\$/tons. The prices of raw sugar of 2023 were higher than those of 2022, likewise, the prices of white sugar of 2023 were higher than those of 2022.

► **Damaged Area**

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

Prospects for Sugar in 2024

► *Production*

Sugarcane production in ASEAN is forecasted to decrease from 167.17 million tons in 2023 to 151.51 million tons in 2024 (Table 32-35, Figure 32-35). The sugarcane production trends for 2024 in ASEAN countries depict a mixed scenario. Cambodia, Indonesia, the Philippines, and Thailand are anticipated to experience a decrease in sugarcane production. On the other hand, Lao PDR, Myanmar, and Vietnam are expected to increase in sugarcane production. **Thailand**, the largest sugarcane-producing country in the region, is forecasted to decrease its production from 93.89 million tons in 2023 to 82.40 million tons in 2024.

For **Lao PDR**, the increase of production was attributed to the growth in both planted area and yield. The increase in planted area was driven by farmers responding to price increases, a decrease in the price of competing crops, favorable weather, and government policies. Similarly, the increase in yield was influenced by favorable weather conditions and improved care practices.

For **Myanmar**, the increase in sugarcane production attributed to a growth in yield. This improvement came from a result of favorable weather conditions, the adoption of enhanced agricultural practices such as increased fertilizer use, and improved overall care of the sugarcane crops by farmers.

For **Vietnam**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was due to farmers responding to a price increase, while the increase in yield was influenced by the use of more fertilizer.

For **Philippines**, the decrease was attributed to a reduction in the planted area. This decline in planted area resulted from using less fertilizer due to high costs, and the first and second ratoon resulted in smaller canes.

For **Thailand**, the decrease was due to the decrease in planted area and yield. The decrease in planted area is a result of drought occurrences. The decrease in yield can be attributed to high production factors such as expensive fertilizer costs, harvesting costs, etc.

► *Utilization and Stock*

The domestic utilization of sugar in ASEAN is forecasted to increase from 15.83 million tons of sugar in 2023 to 16.51 million tons in 2024, which increases 0.68 million tons (Table 38-39). The beginning stock in ASEAN is estimated at 12.27 million tons of sugar in 2024, an increase of 3.13 million tons from 9.14 million tons in 2023. The ending stock of sugar in ASEAN in 2024 is forecasted 10.47 million tons which decreases from 12.26 million tons in 2023.

The ratio of production to domestic utilization in 2024 is forecast to be 86.28 percent, which is lower than the previous year from 109.09 percent. (Table 40, Figure 43).

The ratio of the beginning stock to domestic utilization in 2024 is forecast to be 74.29 percent, which increase from 57.72 percent in 2023 (Table 41, Figure 44).

► *Trade*

The export is predicted to increase from 7.42 million tons in 2023 to 8.99 million tons in 2024 (Table 38-39, Figure 36-38). The import is expected 9.46 million tons in 2024, which increases from 9.11 million tons in 2023 (Tables 38-39, Figure 39-41).

Table 32 Sugarcane production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	171,047.48	167,176.64	-3,870.83	-2.26	151,512.71	-15,663.93	-9.37
Brunei	N/A						
Cambodia	1,855.23	2,374.01	518.79	27.96	1,922.64	-451.37	-19.01
Indonesia	36,436.78	31,045.34	-5,391.44	-14.80	26,451.66	-4,593.68	-14.80
Lao PDR	1,502.27	790.35	-711.92	-47.39	1,653.00	862.65	109.15
Malaysia	N/A						
Myanmar	11,333.35	10,880.60	-452.74	-3.99	11,703.26	822.66	7.56
Philippines	20,326.12	19,434.11	-892.01	-4.39	18,179.60	-1,254.51	-6.46
Singapore	N/A						
Thailand	92,070.67	93,887.88	1,817.21	1.97	82,400.00	-11,487.88	-12.24
Vietnam	7,522.98	8,764.28	1,241.29	16.50	9,202.49	438.21	5.00

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	2,639.59	2,842.60	203.00	7.69	2,720.50	-122.10	-4.30
Brunei	N/A						
Cambodia	43.14	48.37	5.23	12.12	43.79	-4.58	-9.47
Indonesia	488.98	504.78	15.79	3.23	521.08	16.30	3.23
Lao PDR	30.44	15.81	-14.63	-48.06	33.66	17.85	112.94
Malaysia	N/A						
Myanmar	173.17	165.28	-7.90	-4.56	175.88	10.60	6.42
Philippines	357.79	338.37	-19.42	-5.43	320.01	-18.37	-5.43
Singapore	N/A						
Thailand	1,427.20	1,638.40	211.20	14.80	1,491.20	-147.20	-8.98
Vietnam	118.87	131.59	12.72	10.70	134.88	3.29	2.50

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	2,637.85	2,842.60	204.74	7.76	2,720.50	-122.10	-4.30
Brunei	N/A						
Cambodia	41.48	48.37	6.89	16.61	43.79	-4.58	-9.47
Indonesia	488.98	504.78	15.79	3.23	521.08	16.30	3.23
Lao PDR	30.44	15.81	-14.63	-48.06	33.66	17.85	112.94
Malaysia	N/A						
Myanmar	173.10	165.28	-7.82	-4.52	175.88	10.60	6.42
Philippines	357.79	338.37	-19.42	-5.43	320.01	-18.36	-5.43
Singapore	N/A						
Thailand	1,427.20	1,638.40	211.20	14.80	1,491.20	-147.20	-8.98
Vietnam	118.87	131.59	12.72	10.70	134.88	3.29	2.50

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

Table 35 Sugarcane yield in ASEAN countries, 2022 – 2024

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2022/23)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	64.84	58.81	-6.03	-9.30	55.69	-3.12	-5.31
Brunei	N/A						
Cambodia	44.72	49.08	4.36	9.75	43.90	-5.18	-10.55
Indonesia	74.52	61.50	-13.02	-17.47	50.76	-10.74	-17.46
Lao PDR	49.36	50.00	0.64	1.30	49.11	-0.89	-1.78
Malaysia	N/A						
Myanmar	65.47	65.83	0.36	0.55	66.54	0.71	1.08
Philippines	56.81	57.43	0.62	1.09	56.81	-0.62	-1.08
Singapore	N/A						
Thailand	64.51	57.30	-7.21	-11.18	55.26	-2.04	-3.56
Vietnam	63.29	66.60	3.31	5.23	68.23	1.63	2.45

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

Unit: Hectares

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

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

Table 37 Sugar balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,485,044	16,945,020	10,083,796	34,513,861	17,630,244	7,741,907	9,141,711	34,513,862
Brunei	3,632		4,878	8,510	4,959		3,551	8,510
Cambodia	-	185,523		185,523	103,446	*82,076	0	185,523
Indonesia	744,206	2,648,954	6,007,603	9,400,763	7,886,174	404,071	1,110,518	9,400,763
Lao PDR	21,552	300,454	48,573	370,579	185,290	48,938	136,352	370,579
Malaysia	-		1,884,990	1,884,990	*1,644,645	240,346	0	1,884,990
Myanmar	*992,730	905,988	*97,000	1,995,718	1,023,924	285,705	686,089	1,995,718
Philippines	330,861	1,995,041	341,956	2,667,858	1,980,602		687,256	2,667,858
Singapore	N.A		267,990	267,990	201,204	66,787	N.A	267,991
Thailand	*4,909,779	10,156,762	129,113	15,195,654	2,500,000	6,467,734	6,227,920	15,195,654
Vietnam	482,284	752,298	1,301,693	2,536,275	2,100,000	146,250	290,026	2,536,275

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 38 Sugar balance sheet of ASEAN countries, 2023**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	9,141,711	17,275,745	9,108,624	35,526,080	15,836,900	7,421,737	12,267,443	35,526,080
Brunei	3,551		5,472	9,023	5,341		3,682	9,023
Cambodia	-	237,401		237,401	105,169	132,232	0	237,401
Indonesia	1,110,518	2,271,009	5,339,457	8,720,984	6,634,701	200,532	1,885,751	8,720,984
Lao PDR	136,352	158,070	176,634	471,056	235,528	105,321	130,207	471,056
Malaysia	-		1,382,569	1,382,569	*1,269,156	113,412	0	1,382,569
Myanmar	686,089	869,795	*74,000	1,629,884	1,345,276	276,039	8,569	1,629,884
Philippines	687,256	1,804,018	648,750	3,140,024	1,702,149		1,437,875	3,140,024
Singapore	N.A		216,214	216,214	149,580	66,634	N.A	216,214
Thailand	6,227,920	11,059,024	268,706	17,555,650	2,500,000	6,355,578	8,700,072	17,555,650
Vietnam	290,026	876,428	996,822	2,163,275	1,890,000	171,989	101,286	2,163,275

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 39 Sugar balance sheet of ASEAN countries, 2024**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	12,267,443	14,250,505	9,464,634	35,982,582	16,516,831	8,994,187	10,471,566	35,982,583
Brunei	3,682		5,767	9,449	5,329		4,120	9,449
Cambodia	-	192,264		192,264	112,273	79,991	-	192,264
Indonesia	1,885,751	1,923,036	5,366,052	9,174,839	6,967,004	322,084	1,885,751	9,174,839
Lao PDR	130,207	330,600		460,807	230,403		230,403	460,807
Malaysia	-		*1,893,139	1,893,140	*1,699,048	*194,091	0	1,893,140
Myanmar	8,569	*900,000	90,000	998,569	760,672	*182,191	55,706	998,569
Philippines	1,437,875	*1,784,356	*498,673*	3,720,905	*2,082,209		*1,638,694	3,720,905
Singapore	N.A		242,102	242,102	175,392	66,711	N.A	242,103
Thailand	8,700,072	*8,200,000	*100,000	17,000,072	*2,500,000	*8,000,000	*6,500,072	17,000,072
Vietnam	101,286	920,249	1,268,901	2,290,436	1,984,500	149,119	156,818	2,290,436

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

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

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	16,945,020	17,630,244	96.11	17,275,745	15,836,900	109.09	14,250,505	16,516,831	86.28
Brunei	-	4,959	-	-	5,341	-	-	5,329	-
Cambodia	185,523	103,446	179.34	237,401	105,169	225.73	192,264	112,273	171.25
Indonesia	2,648,954	7,886,174	33.59	2,271,009	6,634,701	34.23	1,923,036	6,967,004	27.60
Lao PDR	300,454	185,290	162.15	158,070	235,528	67.11	330,600	230,403	143.49
Malaysia	-	1,644,645	-	-	1,269,156	-	-	1,699,048	-
Myanmar	905,988	1,023,924	88.48	869,795	1,345,276	64.66	900,000	760,672	118.32
Philippines	1,995,041	1,980,602	100.73	1,804,018	1,702,149	105.98	1,784,356	2,082,210	85.70
Singapore	-	201,204	-	-	149,580	-	-	175,392	-
Thailand	10,156,762	2,500,000	406	11,059,024	2,500,000	442	8,200,000	2,500,000	328
Vietnam	752,298	2,100,000	35.82	876,428	1,890,000	46.37	920,249	1,984,500	46.37

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	7,485,044	17,630,244	42.46	9,141,711	15,836,900	57.72	12,271,125	16,516,831	74.29
Brunei	3,632	4,959	73.24	3,551	5,341	66.49	3,682	5,329	69.09
Cambodia	-	103,446	-	-	105,169	-	3,682	112,273	3.28
Indonesia	744,206	7,886,174	9.44	1,110,518	6,634,701	16.74	1,885,751	6,967,004	27.07
Lao PDR	21,552	185,290	11.63	136,352	235,528	57.89	130,207	230,403	56.51
Malaysia	-	1,644,645	-	-	1,269,156	-	1	1,699,048	-
Myanmar	992,730	1,023,924	96.95	686,089	1,345,276	51.00	8,569	760,672	1.13
Philippines	330,861	1,980,602	16.71	687,256	1,702,149	40.38	1,437,875	2,082,210	69.06
Singapore	-	201,204	-	-	149,580	-	-	175,392	-
Thailand	4,909,779	2,500,000	196	6,227,920	2,500,000	249	8,700,072	2,500,000	348
Vietnam	482,284	2,100,000	22.97	290,026	1,890,000	15.35	101,286	1,984,500	5.10

Remark: * The value is estimated by AFSIS Secretariat.

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

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia	34	42,622							7,113	4,726,529			12,354	8,884,634
Lao PDR													48	39,360
Malaysia	4.32	4,861	3,300	2,400	2,079	1,744,956					3,000	1,535,896	42,555	28,162,268
Myanmar	N/A													
Philippines	N/A													
Singapore	N/A													
Thailand	3,143	64,736,576	467,061	9,744,173,452	2,214,852	34,725,758,008	327,687	7,030,851,618	552,259	9,233,664,326	79,432	2,153,505,617	681,288	13,017,924,494
Vietnam		7,090		2,922,686		1,853,681		1,014,498		7,727,051				37,050,978

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia	1,406	1,267,424	22,600	14,217,425	62,281	40,698,802	105,788	69,837,436	18,038	14,045,195	123,826	83,882,631
Lao PDR			18,402	3,023,904	44,869	29,015,369	63,319	32,078,633	85,646	15,098,207	148,965	47,176,840
Malaysia	17,883	10,992,825	1,649	957,754	5,220	3,270,539	75,690	46,671,499	41,019	25,196,712	116,709	71,868,211
Myanmar	N/A											
Philippines	N/A											
Singapore	N/A											
Thailand	135,797	2,896,010,189			143,637	2,737,721,162	4,605,156	81,604,345,442	3,210,677	59,108,178,524	7,815,834	140,712,523,966
Vietnam		2,013,047		14,461,730				67,050,759		163,859,449		230,910,208

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

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

Quantity: Tons Values: US\$

Importing Country	Country of origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia									3,075	2,341,954				
Lao PDR														
Malaysia					1,862	1,134,719							10	21,572
Myanmar	N/A													
Philippines					11,800	7,839,000			43,000	31,277,641				
Singapore					1,766	1,705,537			26,936	24,434,609	25	12,931	1.23	8,553
Thailand					117,385	2,245,912,178	32,434	196,264,367	11,597,048	233,966,655	156	3,221,180	906	127,208,010
Vietnam				15,622,478		67,217,132		46,052,102		14,565,382		56,839,456		10,957,856

Importing Country	Country of origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A											
Cambodia	N/A											
Indonesia			2,241,358	1,192,520,707	21	24,440	2,244,454	1,194,887,101	1,469,293	834,419,109	3,713,747	2,029,306,210
Lao PDR			168,217	82,747,358			168,217	82,747,358	8,417	4,802,806	176,634	87,550,164
Malaysia	976	534,489	503,221	296,788,238	71	50,179	506,140	298,529,198	876,429	483,138,313	1,382,569	781,667,511
Myanmar	N/A											
Philippines			563,450	391,588,032	30,500	23,356,580	648,750	454,061,252			648,750	454,061,252
Singapore			152,042	135,185,801	1,417	1,655,484	182,188	163,002,915	2,309	6,175,039	184,497	169,177,954
Thailand	653	68,508,450			10,582	675,532,205	173,713	3,550,613,045	399,280	11,662,661,631	572,993	15,213,274,676
Vietnam		37,600,628		84,567,888				333,422,921		348,246,152		681,669,073

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

Table 44 FOB Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Myanmar	Not specified	2022	52	56	80	57	55	44	50				80	63	60
		2023	48	47	47	79									55
Malaysia	Not specified	2022	526	526	529	543	565	554	565	568	558	555	573	548	551
		2023	551	559	593	609	603	657	657	694					615
Thailand	Raw Sugar	2022	440	448	405	429	435	439	440	450	512	458	505	516	457
		2023	488	456	451	457	454	462	495	461	472	476	511		471
	White Sugar	2022	511	507	490	517	521	523	526	558	541	547	591	588	535
		2023	583	540	550	573	602	600	633	630	641	654	710		611

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

Table 45 CIF Price of sugar in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Refine Sugar	2022	637	627	614	614	621	621	624	625	616	614	611	624	621
		2023	628	637	660	1,907	674	673	671	705	727				809
	Other Sugar	2022	486	491	494	511	517	504	504	500	488	481	508	495	498
		2023	500	504	516	549	570	585	573	613	561				552
Lao PDR	Not specified	2022	533	407										119	353
		2023	250	250	250	470	572	597	550	546	570				451
Malaysia	Not specified	2022	468	386	374	474	513	549	438	432	506	503	444	518	467
		2023	526	514	564	539	668	660	703	623					599
Singapore	Sugar	2022	562	563	615	607	599	623	658	627	651	645	667	617	620
		2023	596	610	626	620	681	708	725	723	729	763	763	763	692

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

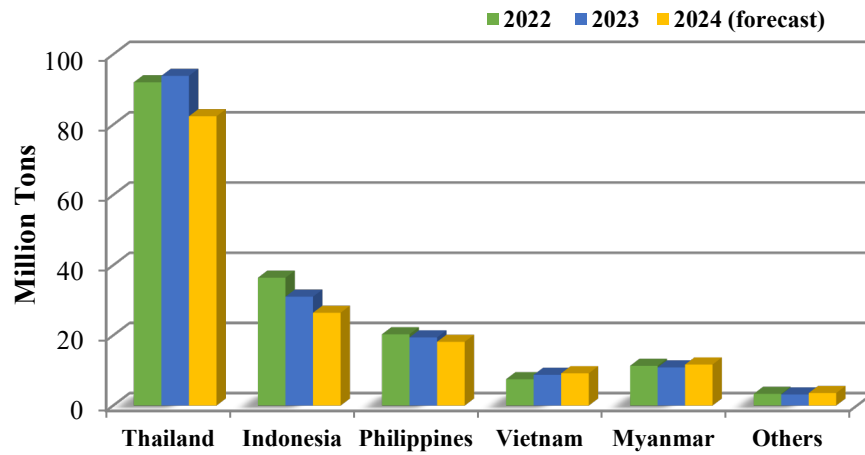


Figure 32 Sugarcane production of selected countries in ASEAN, 2022 – 2024

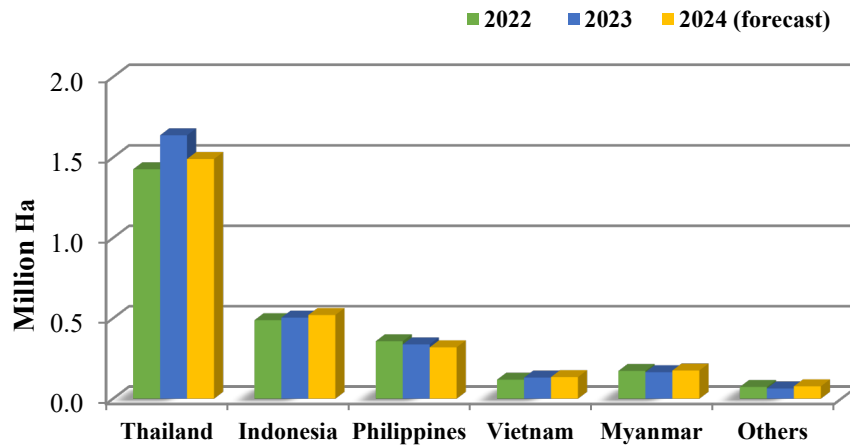


Figure 33 Sugarcane planted area of selected countries in ASEAN, 2022 – 2024

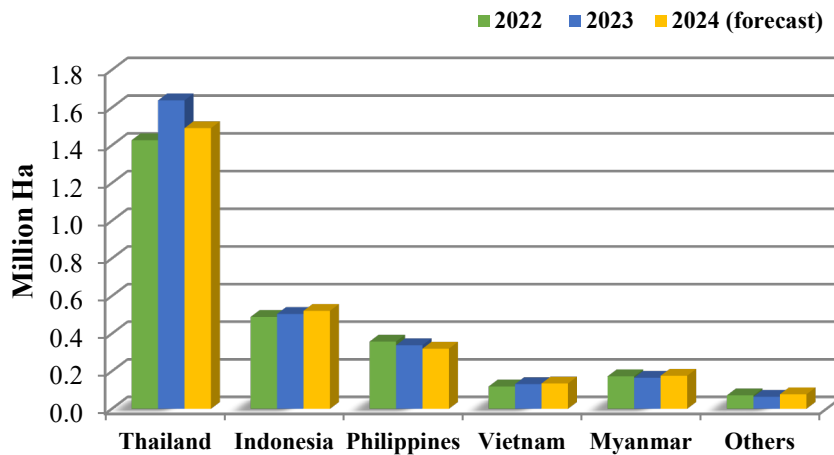


Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2022– 2024

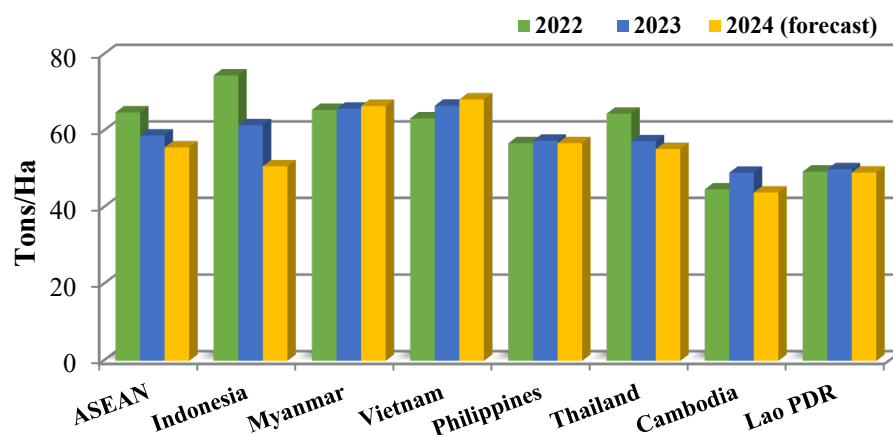


Figure 35 Sugarcane yield of selected countries in ASEAN, 2022 – 2024

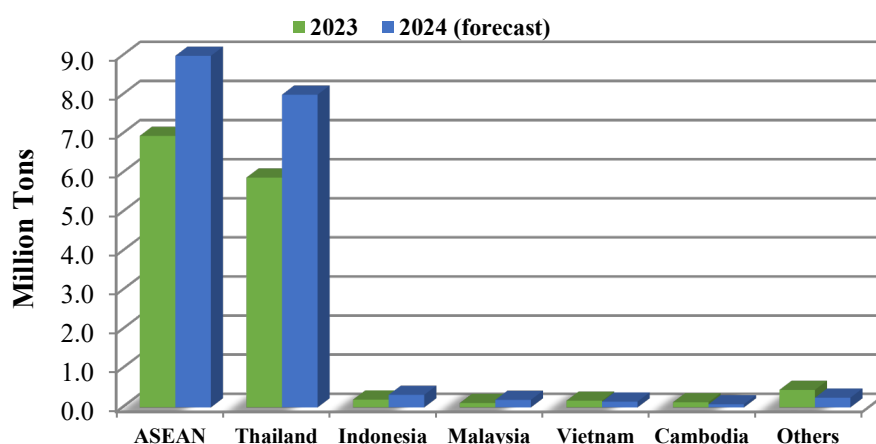
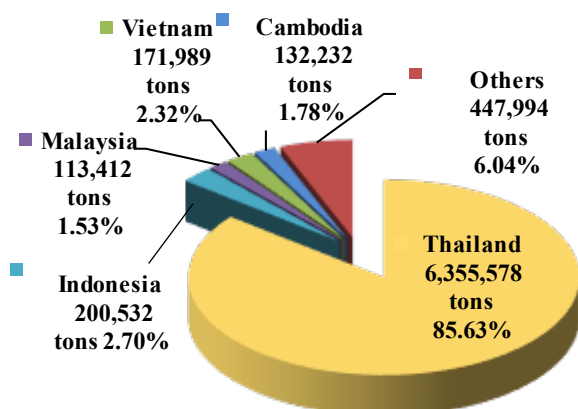
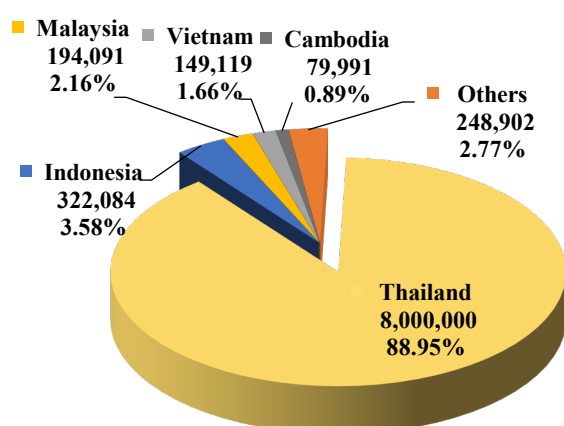


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 6.95 Million Tons

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



Total 8.99 Million Tons

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

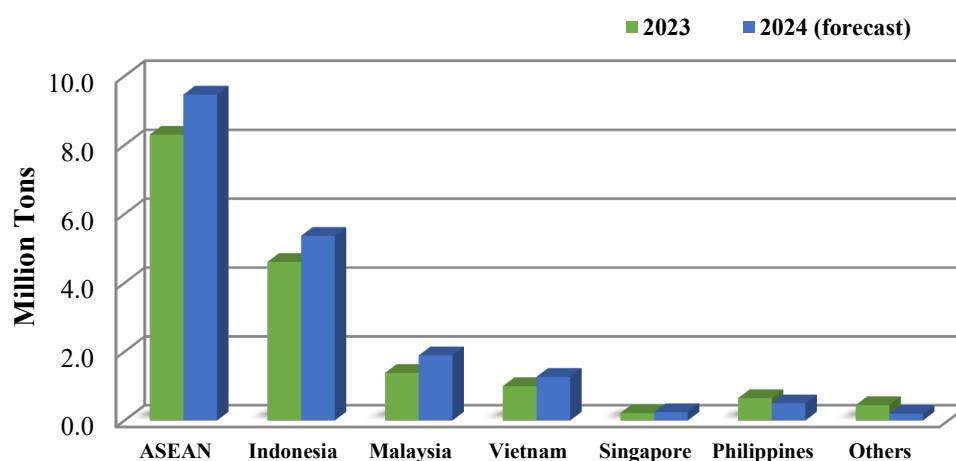
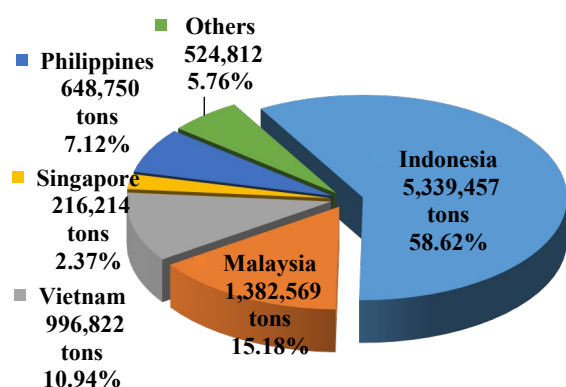
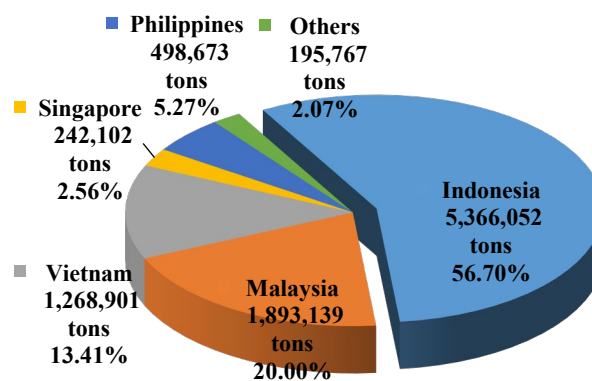


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 8.30 Million Tons

Figure 40 Share of sugar import (tons) among ASEAN countries, 2023



Total 9.46 Million Tons

Figure 41 Share of sugar import (tons) among ASEAN countries, 2024

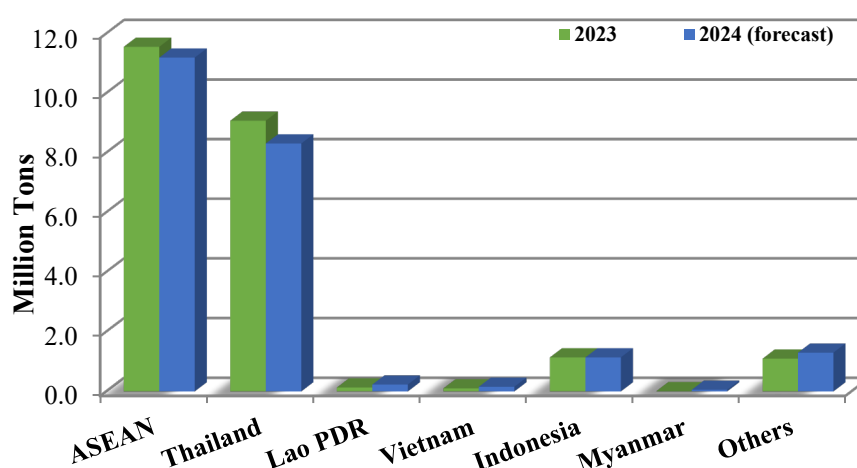


Figure 42 Amount of ending stock of Sugar in ASEAN countries in 2023– 2024

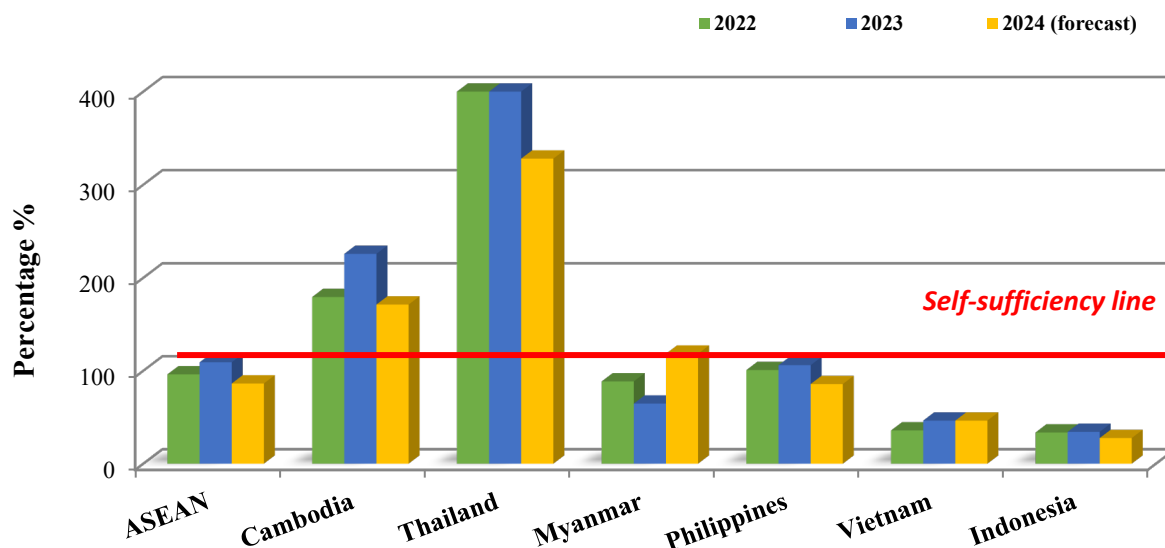


Figure 43 Ratio of sugar production to domestic utilization in ASEAN countries, 2022 – 2024

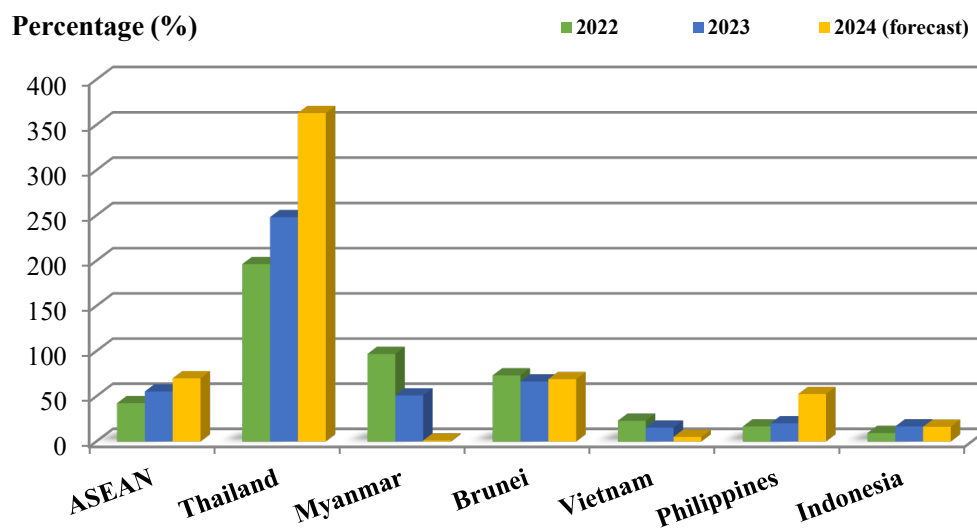


Figure 44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2022– 2024

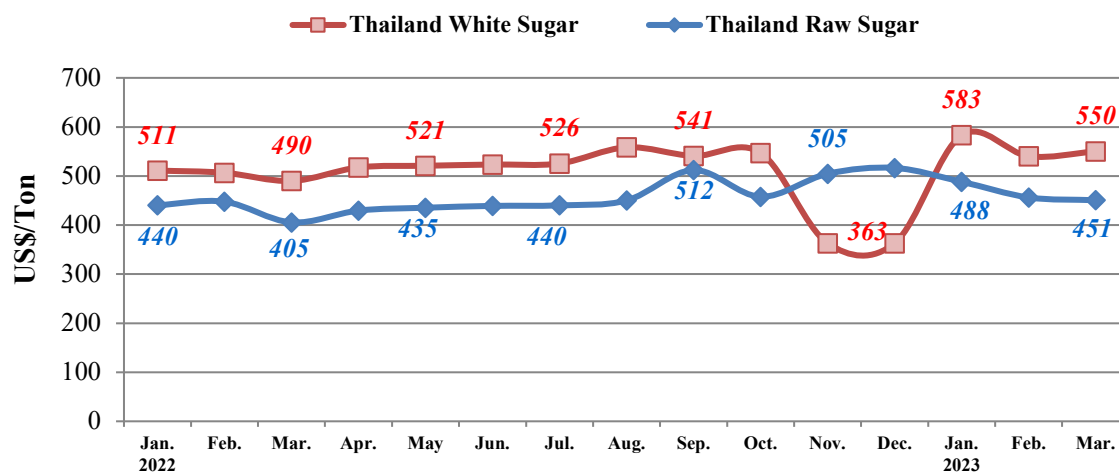


Figure 45 FOB price (US\$/Ton) of white sugar and raw sugar in Thailand in 2022 – 2023

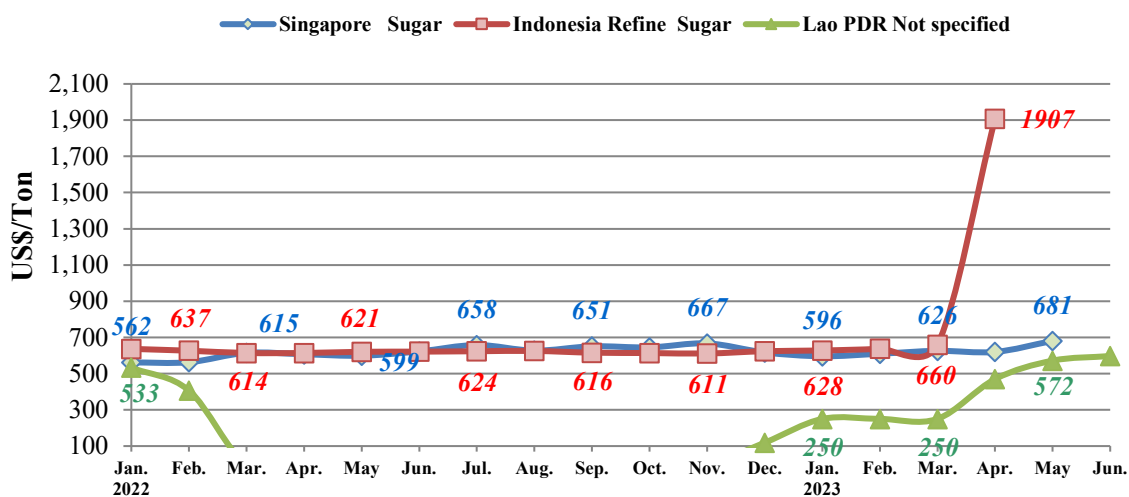


Figure 46 CIF price (US\$/Ton) of sugar of selected countries in ASEAN in 2022 – 2023

Soybean Outlook for 2024

Highlights

The forecast for the supply of ASEAN soybeans indicates an increase from 9.69 million tons in 2023 to 10.38 million tons in 2024, representing 0.69 million tons or 7.12 percent growth (Table 46). This growth in supply primarily stems from increases in beginning stock, production and imports.

The soybean production for 2024 is 0.68 million tons, reflecting an increase from the previous year's production of 0.53 million tons. This indicates a positive trend in soybean supply within the ASEAN region for the specified period. In 2024, the forecasted beginning stock of soybeans in ASEAN is expected to increase to 0.73 million tons, a rise of 0.03 million tons or approximate 4.29 percent increase from the 0.70 million tons recorded in 2023. Furthermore, the anticipated ending stock for 2024 is 1.11 million tons, an increase of approximately 52.05 percent from the 0.73 million tons reported in 2023. These figures suggest a positive outlook for soybean stocks in the region during the specified period.

In terms of soybean's demand in ASEAN in 2024, the domestic utilization is estimated at 9.24 million tons, which increases in the demand for 0.07 million tons from 8.94 million tons in 2023.

The export in 2024 is forecasted to be 0.03 million tons from 0.02 in 2023. This indicates that ASEAN exports very small amounts of soybeans.

The production to domestic utilization ratio (self-sufficiency ratio) in 2024 is forecasted to be 7.37 percent, which increase from 5.95 percent from the previous year.

The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 7.94 percent in 2024, which increases from 7.84 percent.

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

Items	2023	2024	Unit: Million tons	
			Change	
			Quantity	%
Supply (Million tons)	9.69	10.38	0.69	7.12
Beginning stock	0.70	0.73	0.03	4.29
Production	0.53	0.68	0.15	28.30
Import	8.46	8.96	0.50	5.91
Demand (Million tons)	9.69	10.38	0.69	7.12
Domestic utilization	8.94	9.24	0.30	3.36
Export	0.02	0.03	0.01	50.0
Ending stock	0.73	1.11	0.38	52.05
Ratio of production to domestic utilization (%)	5.95	7.37	1.42	23.87
Ratio of beginning stock to domestic utilization (%)	7.84	7.94	0.10	1.28

ASEAN Soybean Situation 2023

► *Production*

The estimated soybean production in ASEAN for the crop year 2022/23 (2023) is 0.53 million tons, reflecting a decrease of 0.06 million tons from the 0.59 million tons recorded in 2022 (crop year 2021/22). The soybean production in Indonesia has experienced a decline, and Indonesia holds the leading position in soybean production within the region. Following Indonesia, other countries contributing to soybean production in the region include Myanmar, Vietnam, Thailand, Cambodia, Lao PDR, and the Philippines. (Table 47-50 and Figure 47-50.)

For **Cambodia**, the increase in production was attributed to the rise in both planted area and yield. The increasing in planted areas was influenced by farmers responding to a price increase. Similarly, the increase in yield attributed to the use of more fertilizer and better care practices.

For **Lao PDR**, the increase of production was due to the increase in planted area and yield. The increase in the planted area is due to farmers responding to price increases, a decrease in the price of competing crops, and government policies. Similarly, the increase in yield attributed to favorable weather conditions and improved care practices.

For **Myanmar**, the increase in production was attributed to the rise in planted area, driven by farmers responding to a price increase.

For the **Philippines**, the increase of production was attributed to the rise in yield. The increase in the yield linked to using more fertilizer and better care practices.

For **Thailand**, the increase was due to the increase in planted area and yield. The increase in the planted area attributed

to favorable soybean prices and high yield, which encourage farmers to not only continue cultivating soybeans but also expand their acreage. There is ample water available for cultivation. Similarly, the increase in yield can be attributed to suitable weather conditions. The favorable weather, unaffected by cold temperatures, has positively impacted the soybean crops.

For **Vietnam**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was due to farmers responding to a price increase and government policy, while the increase in yield was influenced by favorable weather.

For **Indonesia**, the decrease in production was attributed to a decrease in both planted area and yield. The reduction in planted area was influenced by farmers responding to a decrease in prices, an increase in the price of competing crops, and unfavorable weather. Similarly, the decrease in yield was also caused by unfavorable weather conditions.

► *Utilization and Stock*

The domestic utilization of soybeans in ASEAN in 2023 was estimated at 8.93 million tons, representing an increase of 0.40 million tons or about 4.69 percent from the 8.53 million tons reported in 2022. Concurrently, the beginning stock in 2023 estimated at 0.70 million tons, reflecting an increase of 0.12 million tons or 20.30 percent from the 0.58 million tons recorded in 2022. Among the ASEAN countries, Myanmar had the highest soybean stock, followed by Indonesia and Vietnam in 2023 (Table 52-53).

The self-sufficiency ratio, which represents the ratio of production to domestic utilization in ASEAN for 2023, was 5.95 percent, indicating a decrease of approximately 7.00 percent from the previous year (Table 55, Figure 58). Additionally, the food security ratio, which signifies the ratio of beginning stock to domestic utilization in ASEAN for 2023, was estimated to be 7.84 percent, showing an increase from 6.82 percent in previous year (Table 56, Figure 59).

In summary, although soybean production in ASEAN has decreased, the overall volume remains sufficient to meet consumption demands within the region. Consequently, many ASEAN countries continue to heavily depend on soybean imports and show a tendency to increase these imports. While soybeans may not be a primary crop for direct human consumption in the ASEAN region, their significance lies in serving as a crucial raw material for animal feed and cooking oil production. This importance stems from the need to consume a diverse range of products resulting from economic growth within the population.

The impact of the Russia-Ukraine war, including rising fertilizer prices, shortages, high energy prices, and an increase in the cost of food, is affecting soybean-producing countries in the ASEAN region. This situation has the potential to lead to soybean shortages and food insecurity in the future.

► *Trade*

In 2023, ASEAN totally exported soybean 22,141 tons, which decreased 25,700 tons from 47,841 tons in 2022. Moreover, total of ASEAN countries imported soybean 8.46 million tons, which increased 0.35 million tons from 8.10 tons in 2022 (Table 52-53, Figure 51-52).

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

► *Prices*

The monthly FOB price of soybean for exporting countries during 2022-2023 are shown in Table 59 and the monthly CIF prices for importing countries are shown in Table 60. (Table 59, Figure 60)

Damaged Area

The total damaged area of soybean in the ASEAN in 2023 was estimated to be 363 hectares. The major cause of damage was flood, drought and pest which constituted about 52.89 percent, 23.69 percent and 23.42 percent respectively. The majority of damage areas occurred in Indonesia (Table 51).

Prospects for Soybean in 2024

► *Production*

The forecast for soybean production in ASEAN in 2024 indicates an expected increase to 0.60 million tons, marking a growth of approximately 14 percent compared to the production of 2023 as 0.53 million tons (Table 47, Figure 47). This anticipated rise is particularly notable in Indonesia, Cambodia, Vietnam, and the Philippines. Conversely, a decrease in production is expected in Lao PDR, Myanmar, and Thailand.

Indonesia, being the largest soybean-producing country in ASEAN, is projected to undergo a significant production increase, rising from 0.22 million tons in 2023 to 0.36 million tons in 2024. This growth in Indonesian production is attributed to the expansion of both planted and harvested areas, as indicated in Table 47-50 and Figure 47-50. The dynamics in soybean production across ASEAN countries demonstrate the various factors influencing the agricultural landscape in the region.

For **Cambodia**, the increase in production was attributed to the rise in yield. This increase in yield was due to favorable weather and government policy.

For **Indonesia**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was caused by farmers responding to a price increase and favorable weather conditions. Similarly, the increase in yield was also influenced by favorable weather and improved care practices.

For **Lao PDR**, the decrease was attributed to a reduction in the planted area. This decline in planted areas is a result of farmers shifting to other crops due to high prices.

For **Thailand**, the decrease was due to the decrease in planted area and yield.

The decrease in planted areas came from farmers have a shortage of cuttings due to the rotten tuber and drought situation in the beginning of 2023, causing damage to cuttings planted in the 2023/24 cropping season. As a result, the species are in short supply and have high prices. The decrease in yield resulted from floods and diseases.

► *Utilization and Stock*

The domestic utilization of soybeans in ASEAN is forecast to increase by 3.38 percent from 8.93 million tons in 2023 to 9.24 million tons in 2024 (Table 53-54).

The beginning stock in ASEAN in 2024 is forecast to increase by 0.03 million tons or about 4.77 percent from 0.70 million tons in 2023 to 0.73 million tons in 2024 (Table 53-54). On the contrary, the ending stock in ASEAN in 2024 is forecast to increase from 0.73 million tons in 2023 to 1.11 million tons in 2024, which dramatic increases 0.38 million tons or 51.48 percent (Table 53-54, Figure 57).

In 2024, the ratio of production to domestic utilization (self-sufficiency ratio) is forecast to be 7.37 percent, which increases from 5.95 percent in 2023 (Table 55, Figure 58). The ratio of beginning stock to the domestic utilization (food security ratio) is forecast to be 7.94 percent in 2024, which increases 7.84 percent from the previous year (Table 56, Figure 59).

► *Trade*

In 2024, the export of soybeans from the ASEAN is forecast to 26,391 tons, increasing 4,250 tons or 19.19 percent compared to the previous year. While the total import by the ASEAN in 2024 is expect to be 8.96 million tons, increasing 0.50 million tons from 8.46 million tons in 2023 (Table 53 and 54, Figure 51, 53, 54, and 56)

Table 47 Soybean production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	596.19	531.88	-64.31	-10.79	606.34	74.46	14.00
Brunei	N/A						
Cambodia	19.35	23.23	3.88	20.03	26.50	3.28	14.10
Indonesia	301.52	220.12	-81.39	-26.99	364.31	144.18	65.50
Lao PDR	4.75	10.29	5.55	116.86	6.45	-3.84	-37.34
Malaysia	N/A						
Myanmar	195.62	198.93	3.31	1.69	129.93	-69.00	-34.69
Philippines	0.41	0.61	0.20	48.12	1.00	0.39	63.40
Singapore	N/A						
Thailand	22.40	23.48	1.08	4.81	22.94	-0.54	-2.30
Vietnam	52.14	55.22	3.08	5.91	55.22	0.00	0.00

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	386.46	336.71	-49.75	-12.87	399.69	62.98	18.71
Brunei	N/A						
Cambodia	11.55	12.84	1.29	11.14	16.71	3.87	30.13
Indonesia	196.60	138.97	-57.62	-29.31	196.60	57.62	41.46
Lao PDR	1.94	4.01	2.07	107.13	2.60	-1.41	-35.16
Malaysia	N/A						
Myanmar	130.08	132.25	2.17	1.66	135.37	3.12	2.36
Philippines	0.30	0.46	0.17	55.67	0.72	0.26	55.67
Singapore	N/A						
Thailand	13.59	14.17	0.58	4.25	13.69	-0.48	-3.39
Vietnam	32.40	34.00	1.60	4.94	34.00	0.00	0.00

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	370.53	336.20	-34.33	-9.26	399.36	63.16	18.79
Brunei	N/A						
Cambodia	11.54	12.84	1.30	11.25	16.50	3.66	28.51
Indonesia	180.92	138.53	-42.40	-23.43	196.60	58.07	41.92
Lao PDR	1.94	4.01	2.07	107.13	2.60	-1.41	-35.16
Malaysia	N/A						
Myanmar	129.93	132.25	2.32	1.79	135.28	3.03	2.29
Philippines	0.30	0.44	0.14	46.49	0.72	0.29	65.42
Singapore	N/A						
Thailand	13.51	14.14	0.63	4.69	13.66	-0.48	-3.39
Vietnam	32.40	34.00	1.60	4.94	34.00	0.00	0.00

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

Table 50 Soybean yield in ASEAN countries, 2022 – 2024

Unit: Tons/Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	1.61	1.58	-0.03	-1.68	1.52	-0.06	-4.03
Brunei	N/A						
Cambodia	1.68	1.81	0.13	7.90	1.61	-0.20	-11.22
Indonesia	1.67	1.59	-0.08	-4.65	1.85	0.26	16.62
Lao PDR	2.45	2.57	0.12	4.70	2.48	-0.09	-3.35
Malaysia	N/A						
Myanmar	1.51	1.50	0.00	-0.10	0.96	-0.54	-36.15
Philippines	1.39	1.40	0.02	1.11	1.39	-0.02	-1.22
Singapore	N/A						
Thailand	1.66	1.66	0.00	0.11	1.68	0.02	1.13
Vietnam	1.61	1.62	0.01	0.92	1.62	0.00	0.00

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

Table 51 Soybean damaged area in ASEAN by cause of damage, 2023

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	192	86	85	-	-	-	363
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	192	86	85		-	-	363
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

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

Table 52 Soybean balance sheet of ASEAN countries, 2022

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	582,375	597,829	8,105,743	9,285,946	8,537,480	47,841	700,626	9,285,946
Brunei			612	612	612			612
Cambodia		19,350	5,877	25,227	19,227		6,000	25,227
Indonesia	190,970	301,518	2,324,731	2,817,219	2,469,580	11,353	336,286	2,817,219
Lao PDR	18,600	4,745	923	24,268	8,494	15,662	112	24,268
Malaysia	*68,000		722,758	790,758	*717,467	9,291	64,000	790,758
Myanmar	*194,598	195,621	449	390,668	189,487	477	200,704	390,668
Philippines	*10,000	626	167,095	177,721	167,720	2	10,000	177,721
Singapore			22,812	22,812	21,821	991	N/A	22,812
Thailand	N/A	23,829	3,022,180	3,046,009	3,045,074	935	0.00	3,046,009
Vietnam	100,207	52,140	1,838,305	1,990,652	1,897,998	9,130	83,524	1,990,652

Remark: * The value is estimated by AFSIS Secretariat.

Table 53 Soybean balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	700,626	531,574	8,461,982	9,694,182	8,938,028	22,141	734,013	9,694,182
Brunei			630	630	630			630
Cambodia	6,000	23,226	2,939	32,165	18,076		14,089	32,165
Indonesia	336,286	220,124	2,322,212	2,878,622	2,532,697	2,573	343,352	2,878,622
Lao PDR	112	10,290	97	10,499	5,775		4,725	10,499
Malaysia	64,000		*794,817	858,817	*787,176	*9,641	62,000	858,817
Myanmar	200,704	198,928	1,308	400,940	199,706	166	201,067	400,940
Philippines	10,000	*674	*185,326	196,000	*167,722		28,278	196,000
Singapore	N/A		22,112	22,112	21,801	311	N/A	22,112
Thailand	0	23,112	3,200,000	3,223,112	3,222,662	450	0	3,223,112
Vietnam	83,524	55,220	1,932,541	2,071,285	1,981,783	9,000	80,502	2,071,285

Remark: * The value is estimated by AFSIS Secretariat.

Table 54 Soybean balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	734,013	681,052	8,963,663	10,378,728	9,240,463	26,391	1,111,874	10,378,728
Brunei			649	649	649			649
Cambodia	14,089	26,501	2,576	43,166	18,878		24,288	43,166
Indonesia	343,352	363,306	2,378,878	3,085,536	2,569,217	5,368	510,951	3,085,536
Lao PDR	4,725	6,448		11,173	6,145		5,028	11,173
Malaysia	62,000		*807,216	869,216	*799,211	*10,005	60,000	869,216
Myanmar	201,067	*206,340	160,000	567,407	*204,531	*967	361,909	567,407
Philippines	28,278	*500	*195,606	224,384	*167,722		56,662	224,384
Singapore	N/A		22,462	22,462	21,811	651	N/A	22,462
Thailand	0	22,737	3,360,000	3,382,737	3,382,437	300	0	3,382,737
Vietnam	80,502	55,220	2,036,276	2,171,998	2,069,862	9,100	93,036	2,171,998

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	597,829	8,537,480	7.00	531,574	8,938,028	5.95	681,052	9,240,463	7.37
Brunei	0	612	0.00	0	630	0.00	0	649	0.00
Cambodia	19,350	19,227	100.64	23,226	18,076	128.49	26,501	18,878	140.38
Indonesia	301,518	2,469,580	12.21	220,124	2,532,697	8.69	363,306	2,569,217	14.14
Lao PDR	4,745	8,494	55.86	10,290	5,775	178.19	6,448	6,145	104.93
Malaysia	0	717,467	0.00	0	787,176	0.00	0	799,211	0.00
Myanmar	195,621	189,487	103.24	198,928	199,706	99.61	206,340	204,531	100.88
Philippines	626	167,720	0.37	674	167,722	0.40	500	167,722	0.30
Singapore	0	21,821	0.00	0	21,801	0.00	0	21,811	0.00
Thailand	23,829	3,045,074	0.78	23,112	3,222,662	0.72	22,737	3,382,437	0.67
Vietnam	52,140	1,897,998	2.75	55,220	1,981,783	2.79	55,220	2,069,862	2.67

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	582,375	8,537,480	6.82	700,626	8,938,028	7.84	734,013	9,240,463	7.94
Brunei	0	612	0.00	0	630	0.00	0	649	0.00
Cambodia	0	19,227	0.00	6,000	18,076	33.19	14,089	18,878	74.63
Indonesia	190,970	2,469,580	7.73	336,286	2,532,697	13.28	343,352	2,569,217	13.36
Lao PDR	18,600	8,494	218.98	112	5,775	1.95	4,725	6,145	76.89
Malaysia	68,000	717,467	9.48	64,000	787,176	8.13	62,000	799,211	7.76
Myanmar	194,598	189,487	102.70	200,704	199,706	100.50	201,067	204,531	98.31
Philippines	10,000	167,720	5.96	10,000	167,722	5.96	28,278	167,722	16.86
Singapore	0	21,821	0.00	0	21,801	0.00	0	21,811	0.00
Thailand	0	3,045,074	0.00	0	3,222,662	0.00	0	3,382,437	0.00
Vietnam	100,207	1,897,998	5.28	83,524	1,981,783	4.21	80,502	2,069,862	3.89

Remark: * The value is estimated by AFSIS Secretariat.

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

Quantity: Tons Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									1.50	3,127				
Lao PDR														
Malaysia		58,617				6,620,648						5,658		101,970
Myanmar														
Philippines														
Singapore														
Thailand							155	1,770,125	5.14	254,404	136	2,695,652		
Vietnam				4,901,861				69,274						

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	0.0006	60					1.5	3,187	1,864	830,126	1,865	833,313
Lao PDR												
Malaysia		68,974		17,249				6,873,117		1,590,419		8,463,536
Myanmar									4	3,000	4	3,000
Philippines												
Singapore												
Thailand	14	1,168,845			0.20	12,828	310	5,901,854	59	5,219,002	370	11,120,856
Vietnam								4,971,135		32,479		5,003,614

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

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

Quantity: Tons Values: US\$

Importing Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia			0.008	51					4,263	2,712,070				
Lao PDR														
Malaysia						7,838								
Myanmar														
Philippines									105	109,525				
Singapore					0.03	137			3,113	4,402,510	0.03	71		
Thailand									6.00	242,615				
Vietnam			3,564	2,713,647										

Importing Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia			0.0010	12	2.00	3,604	4,265	2,715,737	1,865,590	1,229,816,101	1,869,855	1,232,531,838
Lao PDR			19	25,441	24	5,747	43	31,188	54	18,484	97	49,672
Malaysia		2,619				254,819		265,276		545,657,440		545,922,716
Myanmar									444	466,000	444	466,000
Philippines	3.03	2,332					108	111,857	120,498	82,730,501	120,606	82,842,358
Singapore			0.79	2,231	0.02	10	3,114	4,404,958	18,998	23,718,327	22,112	28,123,285
Thailand							6.00	242,615	2,958,458	63,173,717,705	2,958,464	63,173,960,320
Vietnam							3,564	2,713,647	1,606,887	1,016,083,228	1,610,451	1,018,796,875

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

Table 59 FOB Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2022	984	946	924	957	945	919	939	976	916	963	948	951	947
	2023	900	869	912	892	988	977	1,000	1,026	1,062	1,036	1,010	950	969
Indonesia	2022	777	500	312	496	273	1,357	700	455	726	500	691	672	622
	2023	446	402	365	600	379	509	461	477	576				468
Lao PDR	2022	280	322	352	371	384	387	270	210	210	200	220	210	285
	2023													
Malaysia	2022	634	741	757	791	866	763	1,040	872	749	755	863	948	815
	2023													
Myanmar	2022	730	742		955							570		749
	2023		879	943	844					752				854

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

Table 60 CIF Price of soybean in selected ASEAN countries

Unit: US\$/Tons

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	2022	568	586	662	695	711	754	755	758	738	767	758	677	702
	2023	666	670	685	679	667	647	626	623	638				656
Lao PDR	2022	490	496	545	588	590	598	590	510	540	530	510	510	541
	2023	383	416	572	518	688	720	581	703	366				550
Malaysia	2022	616	576	637	676	721	752	739	753	762	464	721	699	676
	2023													
Myanmar	2022	847		850	858	1,001	1,096		1,111		1,095	1,111	1,115	1,009
	2023	1,140	1,162	1,115	1,039	1,041	1,034	1,111	1,034	1,034				1,079
Singapore	2022	890	881	899	905	969	941	939	969	923	966	909	938	927
	2023	994	934	962	962	949	943	900	947	927	968	968	968	952
Thailand	2022	594	594	563	569	624	640	680	736	704	694	752	732	657
	2023	693	659	665	617	619	599	590	574	572				621
Vietnam	2022	608	626	687	723	732	738	755	751	702	682	692	677	698
	2023	672	717	677	651	613	583	575	582	600	604			627

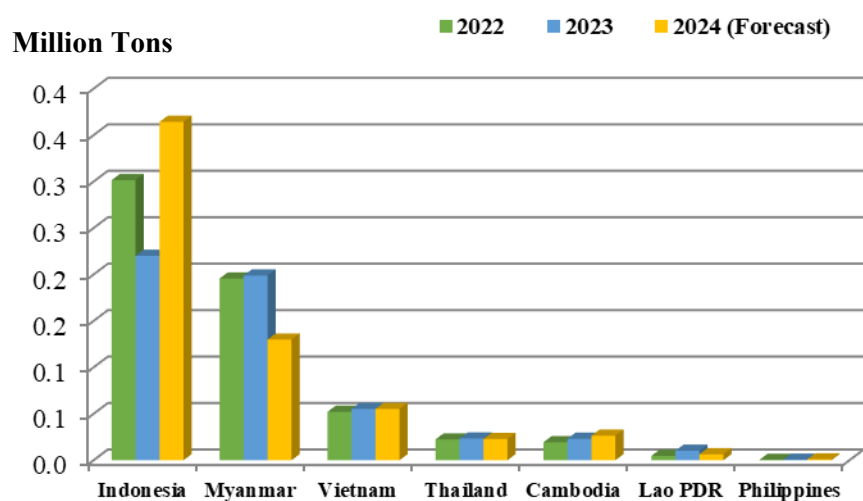


Figure 47 Soybean production of selected countries in ASEAN, 2022 – 2024

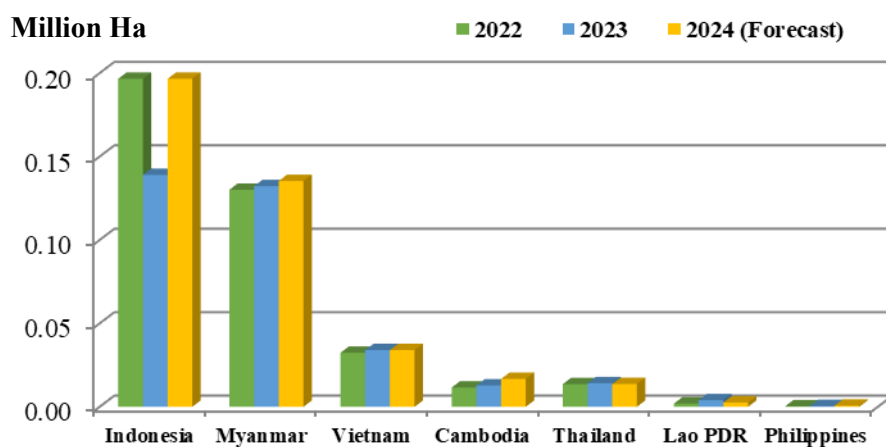


Figure 48 Soybean planted area of selected countries in ASEAN, 2022 – 2024

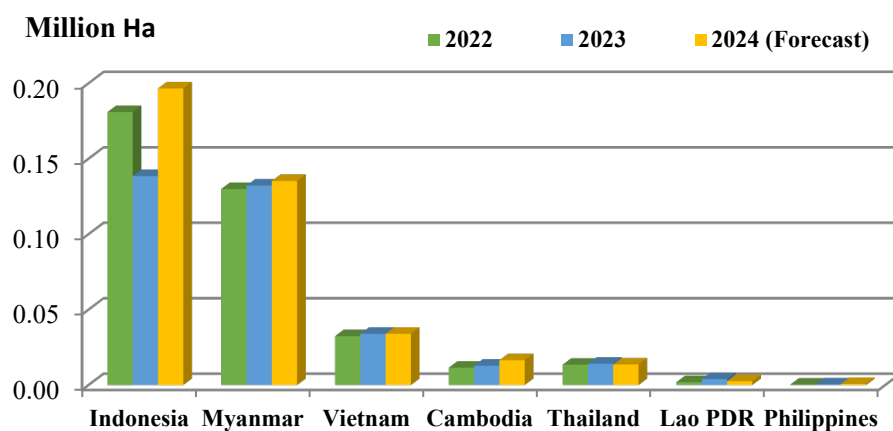


Figure 49 Soybean harvested area of selected countries in ASEAN, 2022 – 2024

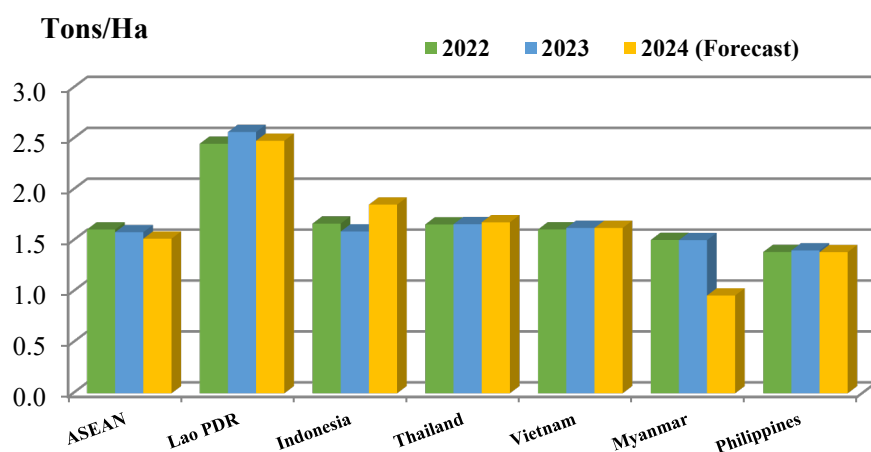


Figure 50 Soybean yield of countries in ASEAN, 2022 – 2024

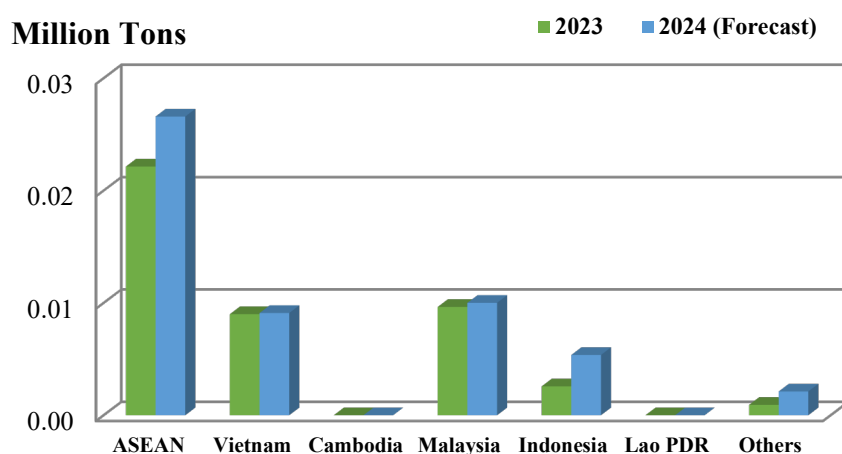
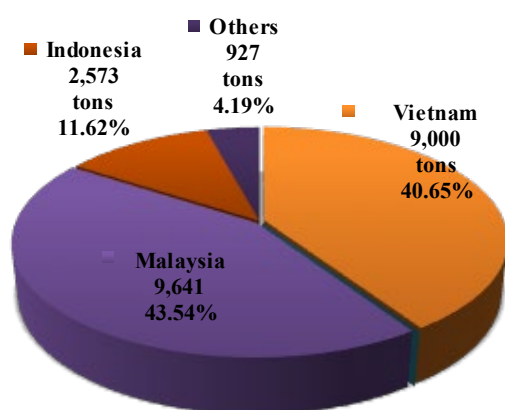
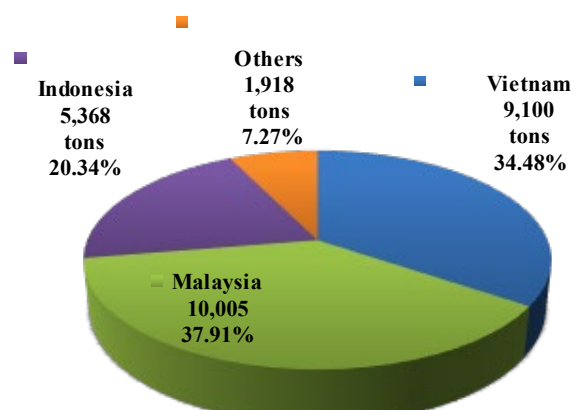


Figure 51 Amount of soybean export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 0.022 million tons

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



Total 0.026 million tons

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

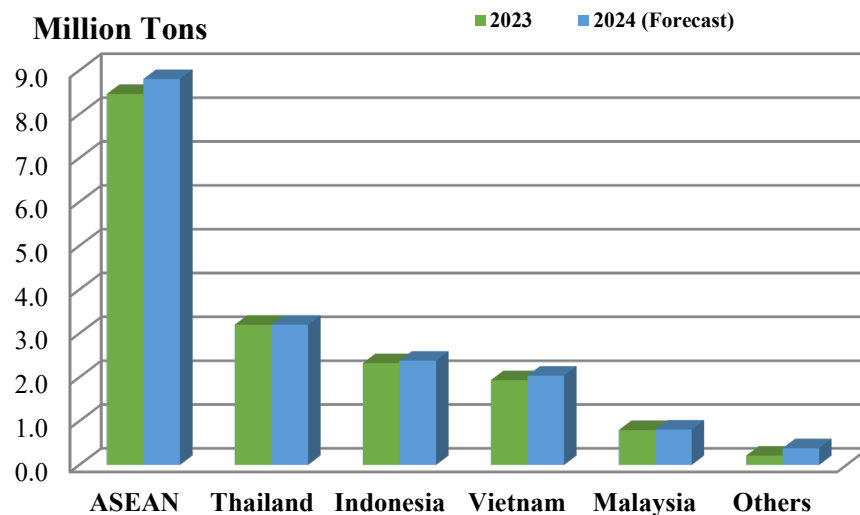
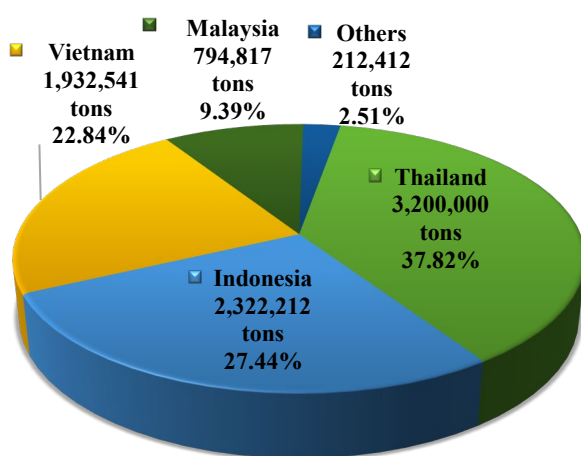
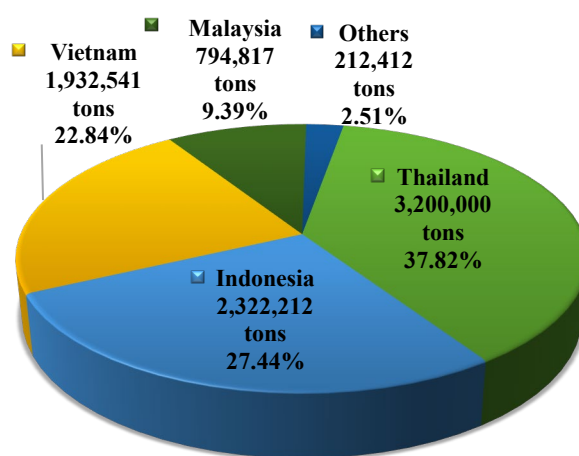


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2022 – 2024



Total 8.46 million tons

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



Total 8.96 million tons

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

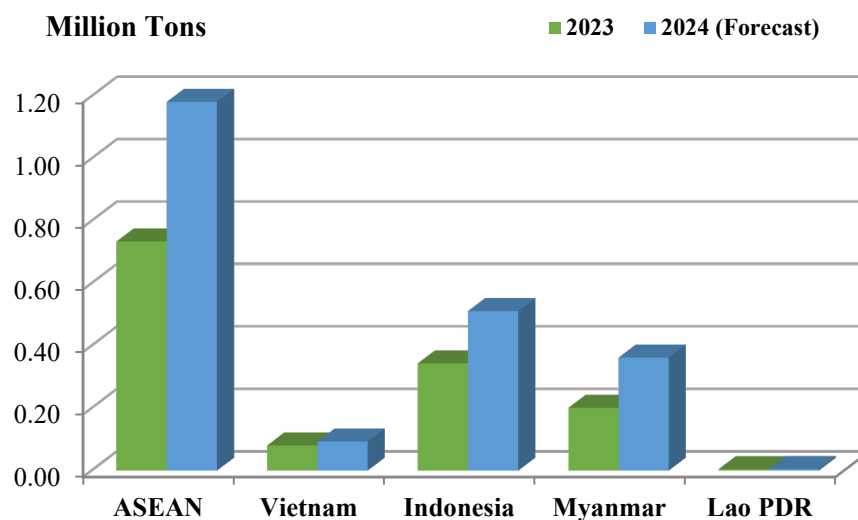


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2023 – 2024

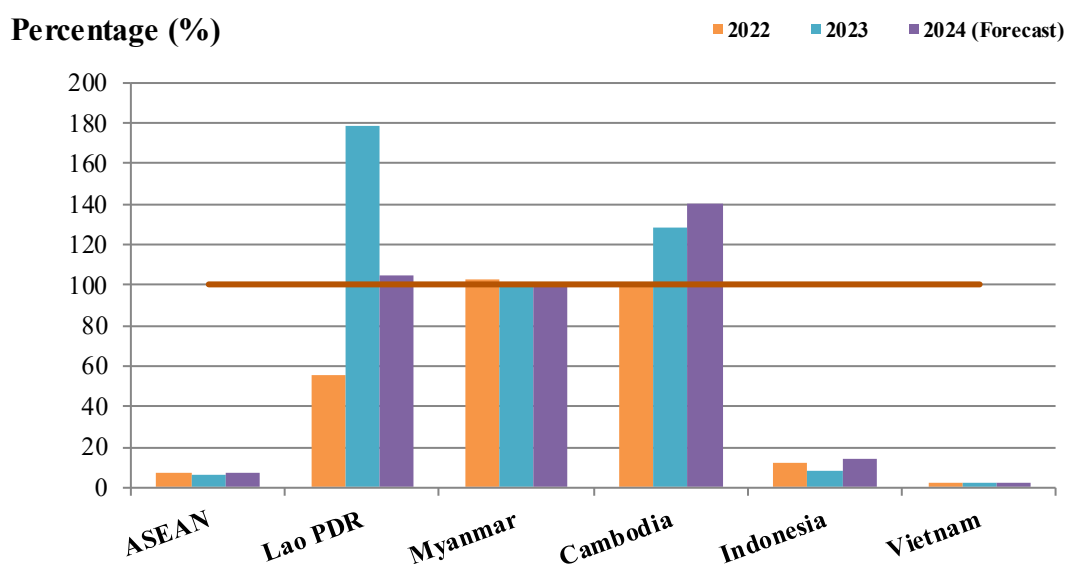


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2022 – 2024

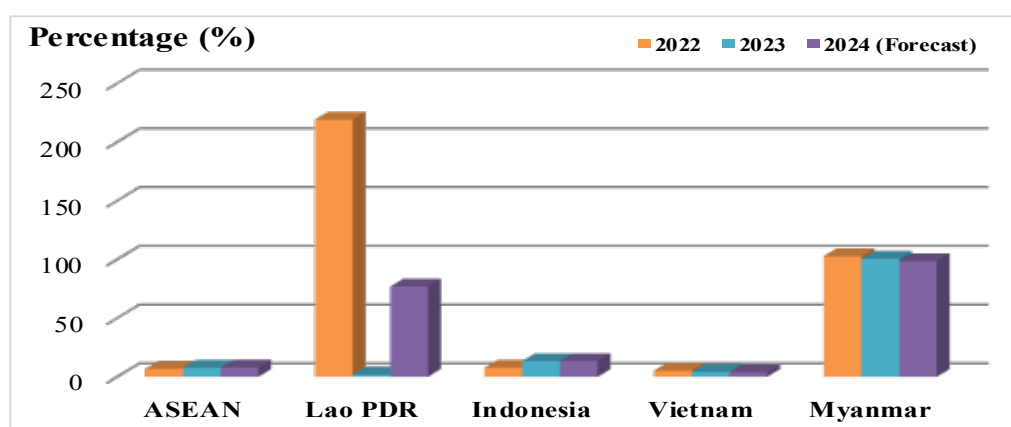


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

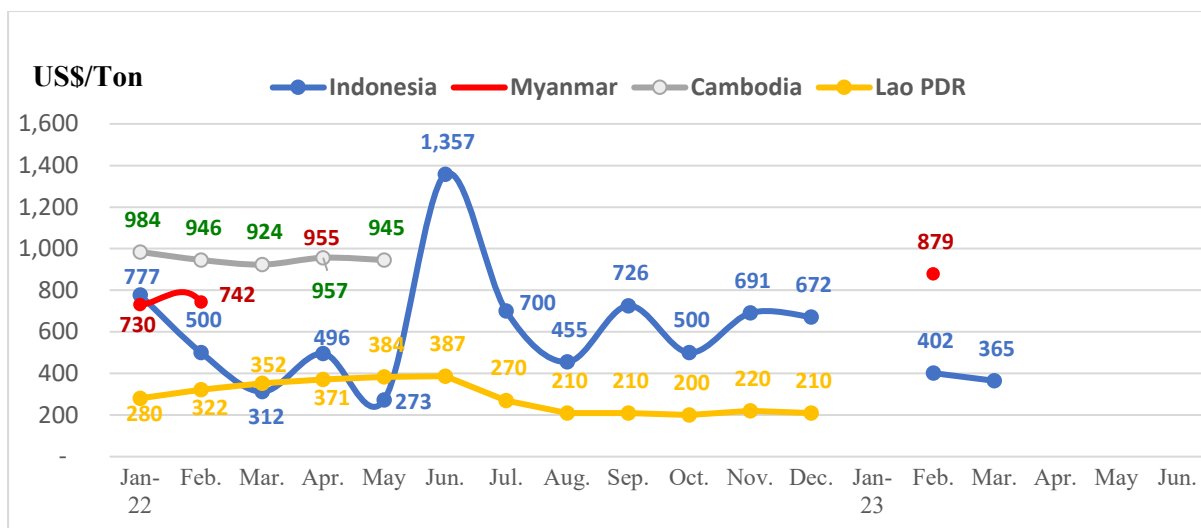


Figure 60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 2022 – 2023

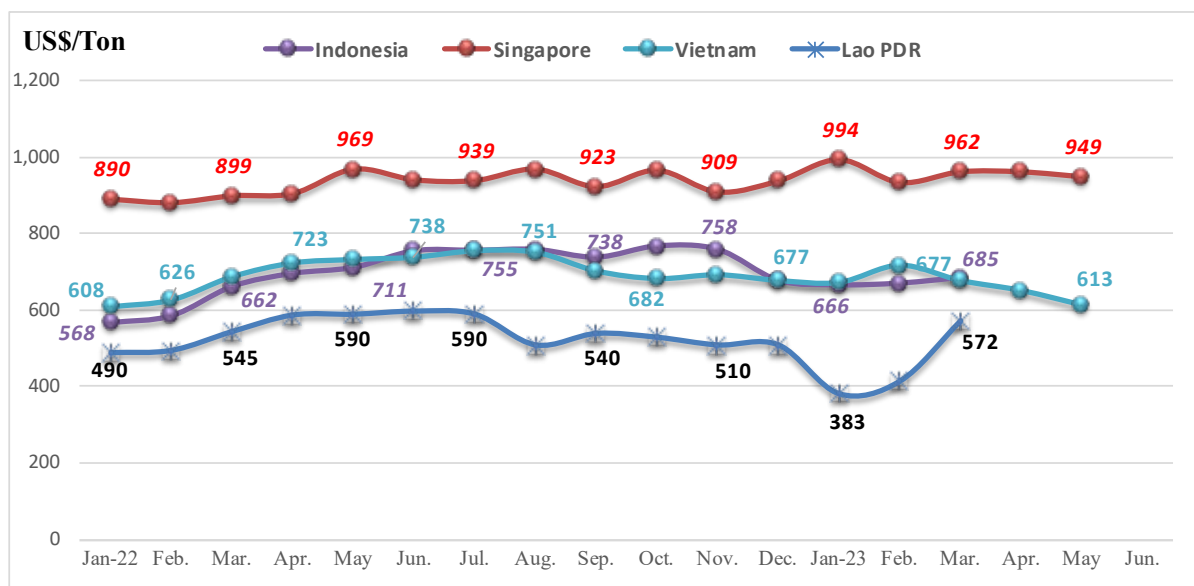


Figure 61 CIF price (US\$/Ton) of soybean of selected countries in ASEAN in 2022 – 2023

Cassava Outlook for 2024

Highlights

In 2024, the supply of cassava in ASEAN is forecast to be 105.93 million tons, a decrease of 1.45 million tons or 1.35 percent from 107.38 million tons in 2023 (Table 61).

The beginning stock of cassava in 2024 is expected to increase 13.24 million tons, which increases by 6.01 million tons or 83.13 percent from 7.23 million tons in 2023 due to the increase in stock in Cambodia, Thailand (Table 61, 68-69). While the ending stock in 2024 is expected to drop 10.73 million tons, which decreases from 13.24 million tons in 2023 (Table 61).

The export of cassava is expected to increase by 3.14 million tons or around 8.37 percent from 37.50 million tons in 2023 to 40.64 million tons in 2024. In addition, the import of cassava is forecasted to be 13.59 million tons in 2024, which decreases 14.64 percent from 15.92 million tons in 2023 (Table 61).

The ratio of production to domestic utilization (self-sufficiency ratio) in 2024 is forecasted to be 145.00 percent, which decreases 2.50 percent from 148.20 percent in 2023. The ratio of beginning stock to domestic utilization (food security ratio) in 2024 is forecast to be 24.28 percent, which increases 90.13 percent from 12.77 percent in 2023 (Table 61).

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

Unit: Million tons

Items	2023	2024	Change	
			Quantity	%
Supply (Million tons)	107.38	105.93	-1.45	-1.35
Beginning stock	7.23	13.24	6.01	83.13
Production	84.23	79.10	-5.13	-6.09
Import	15.92	13.59	-2.33	-14.64
Demand (Million tons)	107.38	105.93	-1.45	-1.35
Domestic utilization	56.64	54.55	-2.09	-3.69
Export	37.50	40.64	3.14	8.37
Ending stock	13.24	10.73	-2.51	-18.96
Ratio of production to domestic utilization (%)	148.72	145.00	-3.72	-2.50
Ratio of beginning stock to domestic utilization (%)	12.77	24.28	11.51	90.13

ASEAN Cassava Situation in 2023

► *Production*

In 2023 (crop year 2022/23), the estimated cassava production (root fresh) in ASEAN was 84.23 million tons, marking a 3.08 percent increase from the 81.71 million tons recorded in 2022. The increase in soybean production is anticipated in Indonesia, Lao PDR, Malaysia and Philippines. On the other hand, a decrease in production is expected in Cambodia, Myanmar, Thailand and Vietnam. (Table 62-65 and Figure 62-65)

Notably, Thailand, which reported the highest production volume, experienced a decrease of 9.79 percent, equivalent to 3.33 million tons from 34.06 million tons in 2022 to 30.73 million tons in 2023.

For **Indonesia**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers respond to price increase and Price of competing crop decrease. Similarly, the increase in yield was also caused by favorable weather and taking care better

For **Lao PDR**, the increase in production was due to the increase in planted area and yield. The increase in planted areas resulted from farmers responding to price increases, a decrease in the price of competing crops, and government policies. Similarly, the increase in yield can be attributed to favorable weather conditions and improved care practices.

For **the Philippines**, the increase in production was due to the increase in yield. The increase in yield can be attributed to favorable weather conditions, specifically sufficient rainfall, along with the use of more fertilizer and improved care practices.

For **Myanmar**, the decrease in production was attributed to the reduction in planted area, driven by the increase in the price of agricultural inputs such as seeds and fertilizers.

For **Thailand**, the decrease was due to the decrease in planted and yield. The decrease in planted areas came from the reduction in planted areas since the end of September 2022 was primarily influenced by the effects of Noru Storm, which brought heavy rain and flooding to certain regions. Consequently, the cassava roots of some factories in these areas were extensively damaged. Additionally, the impact of the El Niño phenomenon resulted in a lack of rainfall from January to June 2023. This condition affected cassava plants planted at the beginning of the season (from October 2022 to January 2023) with some not germinating or standing dead, necessitating repairs or replanting. Between May and July 2023, the unfavorable conditions made it impossible to harvest during this season. Despite efforts in some areas where farmers expanded their cultivation areas to replace animal feed corn, factory sugarcane and Batavia pineapples, the overall harvested area continued to decrease. The decrease in yield can be attributed to floods, diseases and the lack of rain from January to June 2023, which has led to stunted growth of cassava roots from the factory.

For **Vietnam**, the decrease in production was attributed to the decrease in both planted area and yield. The decrease in planted area was due to farmers responding to a price decrease, while the decrease in yield was influenced by using less fertilizer.

► *Utilization and Stock*

The cassava root in ASEAN serves various purposes, including human food, animal feed, and ethanol production. In 2023, the estimated domestic utilization of cassava for all purposes in ASEAN was 56.64 million tons, reflecting a decrease of 2.86 million tons or 4.82 percent from the 59.50 million tons in 2022 (Table 67-68).

The beginning stock of 7.23 million tons in 2023 represents a substantial decrease by 8.54 million tons or approximately 99.59 percent from 15.77 million tons in 2022. Conversely, the ending stock of cassava in 2023 was estimated to be 13.24 million tons, indicating an increase of 6.01 million tons from the 7.23 million tons in 2022.

In 2023, the estimated ratio of production to domestic utilization (**self-sufficient ratio**) raised to 148.72 percent, showing an increase from the 137.33 percent recorded in 2022. **This indicated that, aggregately, the cassava production in ASEAN is sufficient for the demand within ASEAN** (Table 70, Figure 73).

In 2023, the ratio of the ASEAN beginning stock to domestic utilization (food security ratio) is estimated to be 12.77 percent, which decreased from 26.51 percent in 2022 (Table 71, Figure 74).

The cassava production data for ASEAN highlights the self-dependency of many countries in the region, contributing to food security. While cassava is not a staple food in the ASEAN region, it holds significant importance as a raw material for animal feed and energy. In the context of the current food crisis, countries with surplus cassava supply in the ASEAN

region can leverage this advantage by exporting cassava, leading to potential high revenue from exports.

► *Trade*

The cassava exported from ASEAN in 2023 is expected to be 37.50 million tons, which decreased 6.30 million tons from 43.80 million tons in 2022. The cassava imported by ASEAN in 2023 was estimated to be 15.92 million tons, which increased by approximately 2.87 million tons from 13.05 million tons in 2022 (Table 67-68, Figure 66-67, and 69-70).

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

► *Prices*

Table 74-75 provides insights into the FOB prices of cassava in Indonesia, Lao PDR, Malaysia, Myanmar, Thailand, and Vietnam for the years 2022 and 2023, along with CIF prices in Indonesia, Malaysia, and Singapore. Notably, the average FOB prices of starch, pellets, and shredded cassava in Thailand 2023 compared to the previous year.

Prospects for Cassava in 2024

► *Production*

The forecast for cassava production in ASEAN in 2024 anticipates a total of 79.10 million tons. This projection reflects a decrease of 5.12 million tons or approximately 6.09 percent compared to the 2023 production of 84.23 million tons. The increase in soybean production is anticipated in Cambodia, Malaysia and Myanmar. On the other hand, a decrease in production is expected in Indonesia, Lao PDR, Philippines, Thailand and Vietnam. (Table 62-65, Figure 62-65).

For **Cambodia**, the increase in production was attributed to the rise in both planted areas. This increase in planted area was driven by farmers responding to a price increase and favorable weather.

For **Lao PDR**, the decrease in production was attributed to a reduction in the planted area. This decline in planted areas was influenced by an increase in the price of competing crops.

For **Indonesia**, the decrease in production was attributed to the decrease in planted area. This decline in planted area was influenced by farmers responding to a price decrease and an increase in the price of competing crops.

For **Thailand**, the decrease was due to the decrease in planted and yield. The decrease in planted areas came from farmers have a shortage of cuttings due to the rotten tuber situation last year, and in the beginning of 2023, they experienced drought, causing damage to cuttings planted in the 2023/24 cropping season. Therefore, farmers must replant many times. As a result, the species are in short supply have high prices. The decrease in yield resulted from floods and diseases.

For **Vietnam**, the decrease in production was attributed to the decrease in both planted area and yield. The decrease in planted area was due to farmers responding to a price

decrease, while the decrease in yield was influenced by using less fertilizer.

► *Utilization and Stock*

The forecast for the domestic utilization of cassava in 2024 anticipates a decrease to 54.55 million tons, compared to 56.63 million tons in 2023, marking a reduction of 2.08 million tons. The beginning stock for 2024 is projected to be 13.24 million tons, reflecting an increase of 6.00 million tons from the 7.24 million tons recorded in 2023. However, the ending stock for 2024 is expected to be 10.73 million tons, indicating a decrease of 2.51 million tons from the 13.24 million tons reported in 2023 (Table 68-69).

The forecasted ratio of production to domestic utilization (self-sufficient ratio) for 2024 is expected to be 145.00 percent, showing a slight decrease from 148.72 percent in 2023 (Table 70, Figure 73). Additionally, the projected ratio of beginning stock to domestic utilization (food security ratio) for 2024 is 24.28 percent, representing an increase from 12.77 percent in 2023. This indicates a strengthening cassava supply situation in ASEAN (Table 71, Figure 74).

► *Trade*

The forecast for cassava exports from ASEAN in 2024 indicates an increase to 40.64 million tons, rising by 3.14 million tons compared to 37.50 million tons in 2023. Conversely, imports are estimated to decrease to 13.59 million tons in 2024, down by approximately 2.33 million tons from 15.92 million tons in 2023 (Table 68-69, Figures 66, 68, 69, and 71).

Table 62 Cassava production in ASEAN countries, 2022 – 2024

Unit: 1,000 Tons

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	81,716.34	84,230.02	2,513.68	3.08	79,100.25	-5,129.77	-6.09
Brunei	N/A						
Cambodia	14,259.07	13,800.79	-458.28	-3.21	14,844.81	1,044.02	7.56
Indonesia	14,951.35	18,589.39	3,638.04	24.33	18,524.55	-64.85	-0.35
Lao PDR	4,863.40	7,770.85	2,907.45	59.78	4,671.00	-3,099.85	-39.89
Malaysia	42.75	46.39	3.65	8.53	50.35	3.96	8.53
Myanmar	331.53	262.68	-68.85	-20.77	306.66	43.98	16.74
Philippines	2,553.41	2,595.49	42.07	1.65	2,538.02	-57.46	-2.21
Singapore	N/A						
Thailand	34,068.01	30,732.34	-3,335.66	-9.79	27,941.38	-2,790.97	-9.08
Vietnam	10,646.45	10,431.72	-214.74	-2.02	10,223.08	-208.63	-2.00

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	4,013.39	4,040.54	27.15	0.68	3,907.68	-132.86	-3.29
Brunei	N/A						
Cambodia	752.98	702.17	-50.81	-6.75	778.03	75.86	10.80
Indonesia	549.23	627.28	78.05	14.21	603.69	-23.59	-3.76
Lao PDR	191.30	240.51	49.21	25.72	149.20	-91.31	-37.96
Malaysia	2.73	2.82	0.08	3.00	2.90	0.08	3.00
Myanmar	33.49	23.08	-10.41	-31.09	23.00	-0.08	-0.35
Philippines	215.63	218.29	2.66	1.23	221.00	2.70	1.24
Singapore	N/A						
Thailand	1,737.92	1,706.88	-31.03	-1.79	1,620.75	-86.13	-5.05
Vietnam	530.11	519.51	-10.60	-2.00	509.12	-10.39	-2.00

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

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

Unit: 1,000 Hectares

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	3,817.26	3,823.92	6.67	0.17	3,734.34	-89.58	-2.34
Brunei	N/A						
Cambodia	714.20	702.17	-12.03	-1.68	778.03	75.86	10.80
Indonesia	549.23	627.28	78.05	14.21	603.69	-23.59	-3.76
Lao PDR	191.30	240.51	49.21	25.72	149.20	-91.31	-37.96
Malaysia	2.38	2.45	0.07	3.00	2.53	0.07	3.00
Myanmar	27.04	18.89	-8.15	-30.14	22.98	4.09	21.63
Philippines	215.63	217.11	1.48	0.68	221.00	3.89	1.79
Singapore	N/A						
Thailand	1,587.37	1,496.01	-91.36	-5.76	1,447.81	-48.20	-3.22
Vietnam	530.11	519.51	-10.60	-2.00	509.12	-10.39	-2.00

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

Table 65 Cassava yield in ASEAN countries, 2022 – 2024

Unit: Ton/Hectare

Country	2022 (2021/22)	2023 (2022/23)	Change 2023 over 2022		2024 (2023/24)	Change 2024 over 2023	
			Quantities	(%)		Quantities	(%)
ASEAN	21.41	22.03	0.62	2.90	21.18	-0.85	-3.86
Brunei	N/A						
Cambodia	19.97	19.65	-0.32	-1.60	19.08	-0.57	-2.90
Indonesia	27.22	29.63	2.41	8.85	30.69	1.06	3.58
Lao PDR	25.42	32.31	6.89	27.10	31.31	-1.00	-3.10
Malaysia	17.96	18.92	0.96	5.35	19.93	1.01	5.34
Myanmar	12.26	13.91	1.65	13.46	13.35	-0.56	-4.03
Philippines	11.84	11.95	0.11	0.93	11.48	-0.47	-3.93
Singapore	N/A						
Thailand	21.46	20.54	-0.92	-4.29	19.30	-1.24	-6.04
Vietnam	20.08	20.08	0.00	0.00	20.08	0.00	0.00

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

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

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecify	Total
ASEAN	-	-	-	-	-	-	-
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

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

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

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	15,773,119	81,721,132	13,044,209	110,538,461	59,506,145	43,798,287	7,234,028	110,538,460
Brunei	N/A	374	0.95	375	375	-	N/A	375
Cambodia	*3,225,016	14,259,072		14,259,072	8,574,467	3,618,486	5,291,135	17,484,088
Indonesia		14,951,350	290,270	15,241,620	15,226,708	14,912	0	15,241,620
Lao PDR	9,101,638	4,863,400	24,235	13,989,273	11,890,882	1,464,950	633,441	13,989,273
Malaysia		42,747	847	43,594	*42,554	*1,039	0	43,594
Myanmar	*396,179	331,533	24.00	331,557	*548,609	*6,715	172,412	727,736
Philippines		2,560,043	0	2,560,043	2,558,177	1,866	0	2,560,043
Singapore			1,729	1,729	1,727	2	N/A	1,729
Thailand	*2,629,670	34,068,005	*12,600,000	49,297,675	12,980,000	35,440,000	877,675	49,297,675
Vietnam	420,617	10,644,609	127,103	11,192,328	7,682,647	3,250,316	259,366	11,192,328

Remark: * The value is estimated by AFSIS Secretariat.**Table 68 Cassava balance sheet of ASEAN countries, 2023 (Cassava roots fresh)**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,234,028	84,230,022	15,920,106	107,384,156	56,637,022	37,504,016	13,243,117	107,384,156
Brunei	N/A	379	1.00	380	380	-	N/A	380
Cambodia	5,291,135	13,800,789		19,091,924	8,740,017	3,661,908	6,689,999	19,091,924
Indonesia	-	18,589,391	37,275	18,626,666	18,434,038	192,628	0	18,626,666
Lao PDR	633,441	7,770,846	24,225	8,428,512	6,742,809	1,645,543	40,159	8,428,512
Malaysia	-	46,393	797	47,190	*46,357	833	0	47,190
Myanmar	172,412	*262,679	*208	435,299	*385,010	*35,731	14,558	435,299
Philippines	-	2,595,486	*103,288	2,698,774	*2,697,325	*1,449	0	2,698,774
Singapore	N/A		1,616	1,616	1,613	3	N/A	1,616
Thailand	877,675	30,732,343	*15,500,000	47,110,018	11,830,000	28,900,000	6,380,018	47,110,018
Vietnam	259,366	10,431,717	252,695	10,943,777	7,759,473	3,065,921	118,383	10,943,777

Remark: * The value is estimated by AFSIS Secretariat.**Table 69 Cassava balance sheet of ASEAN countries, 2024 (Cassava roots fresh)**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	13,243,117	79,100,251	13,586,429	105,929,798	54,551,407	40,644,670	10,733,720	105,929,797
Brunei	N/A	398	1.05	399	399	-	N/A	399
Cambodia	6,689,999	14,844,812		21,534,811	8,622,877	3,700,358	9,211,576	21,534,811
Indonesia	-	18,524,545	125,352	18,649,897	18,483,528	166,369	0	18,649,897
Lao PDR	40,159	4,671,000		4,711,159	4,004,485		706,674	4,711,159
Malaysia	-	50,350	*900	51,250	*50,250	*1,000	0	51,250
Myanmar	14,558	*306,664		321,222	*284,105	*16,612	20,505	321,222
Philippines	-	*2,538,025	*130,000	2,668,025	*2,667,025	*1,000	-	2,668,025
Singapore	N/A		1,672	1,672	1,670	2	N/A	1,672
Thailand	6,380,018	27,941,375	*13,000,000	47,321,393	*12,600,000	*34,000,000	721,393	47,321,393
Vietnam	118,383	10,223,082	328,504	10,669,969	7,837,068	2,759,329	73,573	10,669,969

Remark: * The value is estimated by AFSIS Secretariat.

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

Unit: Tons

Country	2022			2023			2024		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	81,721,132	59,506,145	137.33	84,230,022	56,637,022	148.72	79,100,251	54,551,407	145.00
Brunei	374	375	99.73	380	380	99.74	398	399	99.75
Cambodia	14,259,072	8,574,467	166.30	13,800,789	8,740,017	157.90	14,844,812	8,622,877	172.16
Indonesia	14,951,350	15,226,708	98.19	18,589,391	18,434,038	100.84	18,524,545	18,483,528	100.22
Lao PDR	4,863,400	11,890,882	40.90	7,770,846	6,742,809	115.25	4,671,000	4,004,485	116.64
Malaysia	42,747	42,554	100.45	46,393	46,357	100.08	50,350.17	50,250	100.20
Myanmar	331,533	548,609	60.43	262,679	385,010	68.23	306,664	284,105	107.94
Philippines	2,560,043	2,558,177	100.07	2,595,486	2,697,325	96.22	2,538,025	2,667,025	95.16
Singapore	-	1,727	0.00	-	1,613	0.00	-	1,670	0.00
Thailand	34,068,005	12,980,000	262.47	30,732,343	11,830,000	259.78	27,941,375	12,600,000	221.76
Vietnam	10,644,609	7,682,647	138.55	10,431,717	7,759,473	134.44	10,223,082	7,837,068	130.45

Remark: * The value is estimated by AFSIS Secretariat.**Table 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2022 – 2024**

Unit: Tons

Country	2022			2023			2024		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	15,773,119	59,506,145	26.51	7,234,028	56,637,022	12.77	13,243,117	54,551,407	24.28
Brunei	N/A	375	-	N/A	380	-	N/A	399	-
Cambodia	3,225,016	8,574,467	37.61	5,291,135	8,740,017	60.54	6,689,999	8,622,877	77.58
Indonesia	-	15,226,708	0.00	-	18,434,038	0.00	-	18,483,528	-
Lao PDR	9,101,638	11,890,882	76.54	633,441	6,742,809	9.39	40,159	4,004,485	1.00
Malaysia	-	42,554	0.00	-	46,357	0.00	-	50,250	-
Myanmar	396,179	548,609	72.22	172,412	385,010	44.78	14,558	284,105	5.12
Philippines	-	2,558,177	0.00	-	2,697,325	0.00	-	2,667,025	-
Singapore	-	1,727	0.00	N/A	1,613	-	N/A	1,670	-
Thailand	2,629,670	12,980,000	20.26	877,675	11,830,000	7.42	6,380,018	12,600,000	50.64
Vietnam	420,617	7,682,647	5.47	259,366	7,759,473	3.34	118,383	7,837,068	1.51

Remark: * The value is estimated by AFSIS Secretariat.

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

Quantity: Tons, Values: US\$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									0.18	947				
Lao PDR														
Malaysia														
Myanmar									38	14,000				
Philippines														
Singapore					4.00	31,731.00			1,590	751,454				
Thailand	364	8,761,755	2,011	67,238,315	86,746	2,394,804,633	38,050	700,961,929	180,375	3,486,185,312	14,816	289,849,512	115,972	2,555,398,708
Vietnam									9,903	5,122,644			15,432	7,438,805

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	0.32	1,812					0.50	2,759	1,590	3,478,717	1,590	3,481,477
Lao PDR			1,390,266	192,171,405	196,779	37,909,531	1,587,044	230,080,936	58,499	19,101,442	1,645,543	249,182,378
Malaysia	831	237,585					831	237,585	1.92	3,357	833	240,942
Myanmar			1,349	189,000			1,387	203,000	27	9,000	1,414	212,000
Philippines									1,450	1,993,649	1,450	1,993,649
Singapore			21	55,441	0.20	735	1,615	839,361	1.00	3,401	1,616	842,762
Thailand	55,389	1,004,976,955			33,987	949,270,355	527,711	11,457,447,474	7,119,124	97,924,660,381	7,646,835	109,382,107,855
Vietnam							25,335	12,561,449	2,373,082	1,015,455,763	2,398,417	1,028,017,212

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

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

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia					95	95,443								
Lao PDR														
Malaysia					29	12,123								
Myanmar														
Philippines					689	268,904								
Singapore					3.97	31,731			1,590	751,454				
Thailand			1,651,961	6,612,824,806			1,762,401	10,140,115,447	26	6,078,179	44,331	232,753,784	0.004	972
Vietnam								22,794,928						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia			506	137,580			601	233,023			601	233,023
Lao PDR			19,686	8,440,747	31	12,281	19,718	8,453,028	401	117,620	20,119	8,570,648
Malaysia					515	191,807	545	203,930	252	276,327	797	480,257
Myanmar			78	213,000			78	213,000			78	213,000
Philippines			85,620	47,817,723	16,976	8,057,599	103,286	56,144,226	2.54	8,831	103,286	56,153,057
Singapore			21	55,441	0.23	735	1,645	839,361	1.05	3,401	1,616	842,762
Thailand	2.71	53,980,236			2,215	63,429,711	3,460,936	17,109,183,135	13,560	1,417,615,556	3,474,496	18,526,798,691
Vietnam				3,226,785				26,021,713		3,070,347		29,092,060

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

Table 74 FOB Price of Cassava in selected ASEAN countries

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022	997	2,395	2,271	2,018	502		1,641	1,896	2,744	2,168	913	885	1,536
		2023	2,087	2,201	1,914	1,264	2,827	2,457	2,218	2,207	1,896				2,119
Lao PDR	Not specified	2022	144	147	150	146	144	145						140	145
		2023	140	144	141	351	341	374	332	432	455				301
Malaysia	Not specified	2022	239	292	262	260	277	292	334	259	276	286	321	288	282
		2023	246	277	238	320	339	305	332	288					293
Myanmar	Not specified	2022	330	271	295	224	239	206					360	364	286
		2023	133	144	138	138	140	203		348	400	333			220
Thailand	Starch	2022	488	488	490	497	516	535	514	498	485	483	474	485	496
		2023	492	515	528	541	558	563	563	563	565	567	569	580	550
	Pellets	2022	346	348	249		277	274	291	312	649	297	380	374	345
		2023	289	280	279	279	287	376	390	367	365	354	392		333
	Shredded	2022	245	247	262	277	288	291	283	275	271	264	252	251	267
		2023	268	275	274	270	269	263	265	272	277	282	278	271	272
Vietnam	Not specified	2022	431	408	442	444	438	440	453	468	452	431	423	392	435
		2023	391	376	382	400	415	463	495	467	468	509			436

Remark: N/A refers to data that is not available.**Table 75 CIF Price of Cassava in selected ASEAN countries**

Unit: US\$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Not specified	2022										1,000		637	136
		2023	1,000	272											141
Malaysia	Not specified	2022	321	417	2,672	489	442	541	369	373	1,368	485	923	1,080	790
		2023	586	881	855	404	384	413	806	922					656
Singapore	Not specified	2022	327	351	342	340	336	354	359	354	358	387	342	386	353
		2023	358	349	393	400	387	334	460	417	390	382	382	382	386

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

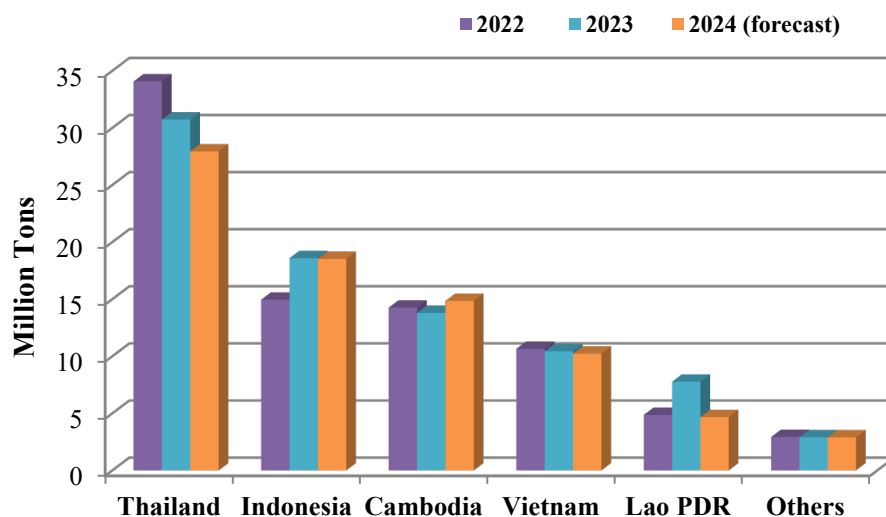


Figure 62 Cassava production of selected countries in ASEAN, 2022 – 2024

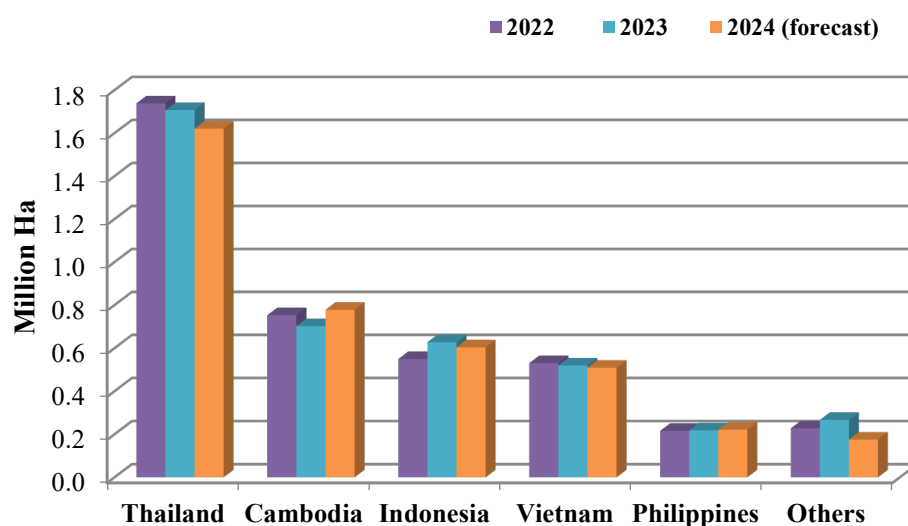


Figure 63 Cassava planted area of selected countries in ASEAN, 2022 – 2024

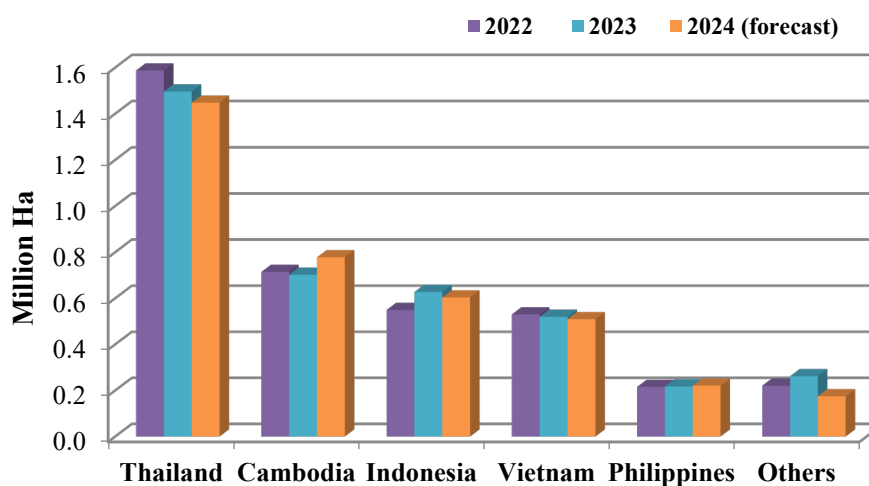


Figure 64 Cassava harvested area of selected countries in ASEAN, 2022 – 2024

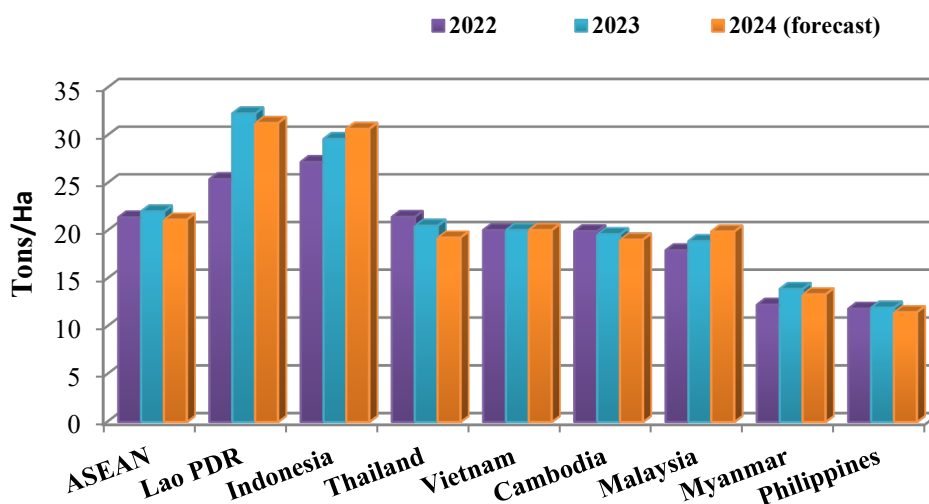


Figure 65 Cassava yield of countries in ASEAN, 2022 – 2024

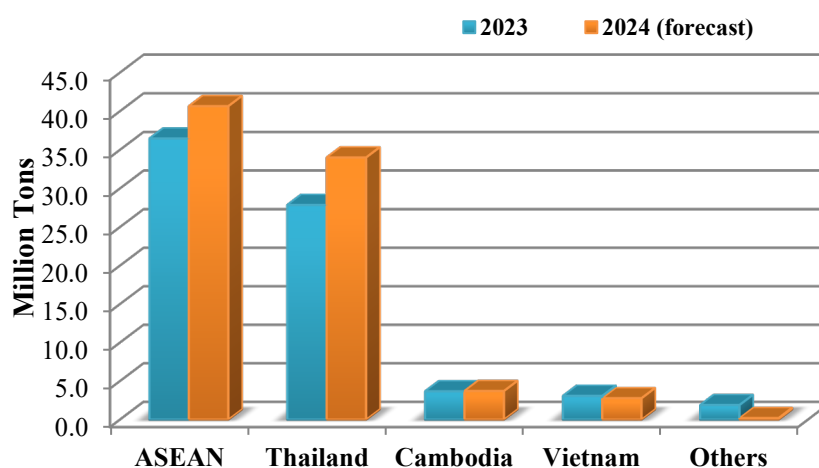
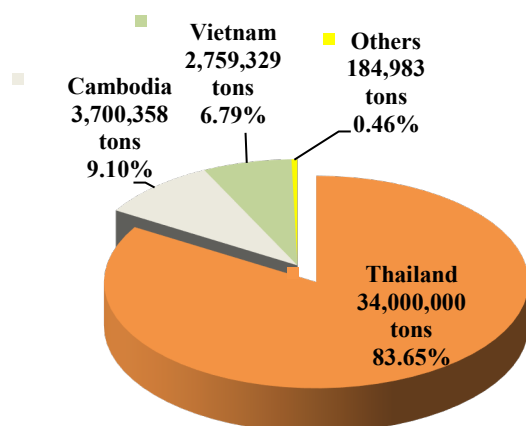
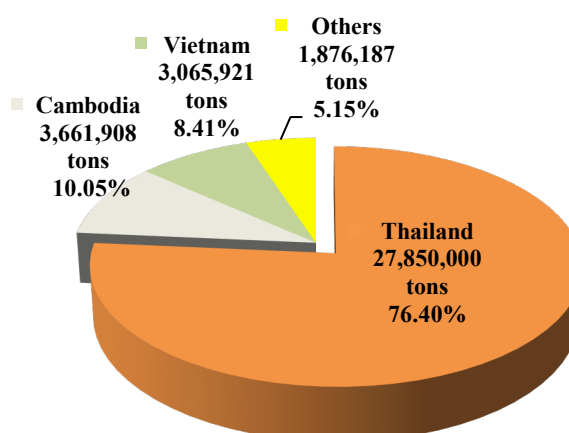


Figure 66 Amount of cassava export (million tons) of selected countries in ASEAN in 2023 – 2024



Total 40.64 Million Tons

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



Total 37.50 Million Tons

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

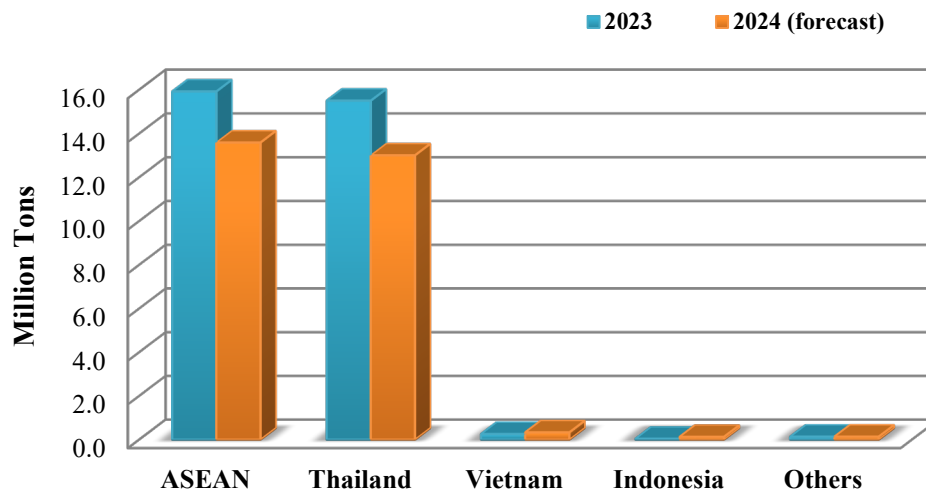
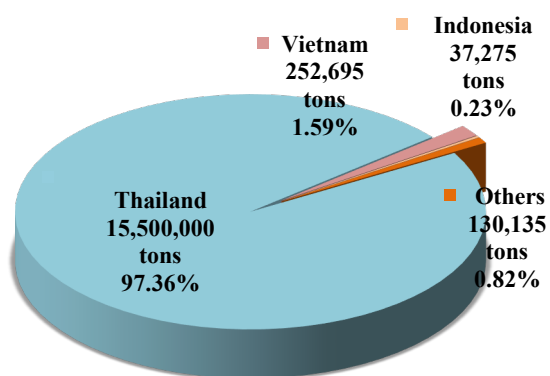
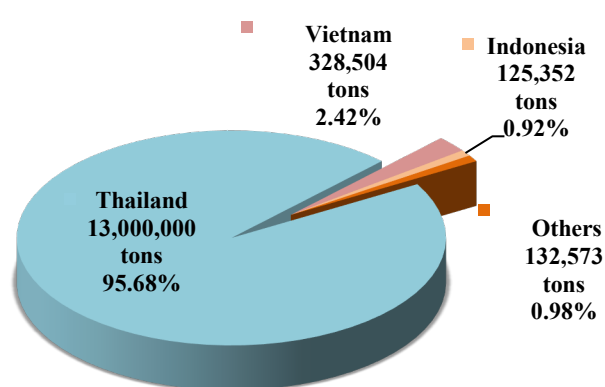


Figure 69 Amount of cassava import (million tons) by selected countries in ASEAN in 2023 – 2024



Total 15.92 Million Tons

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



Total 13.58 Million Tons

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

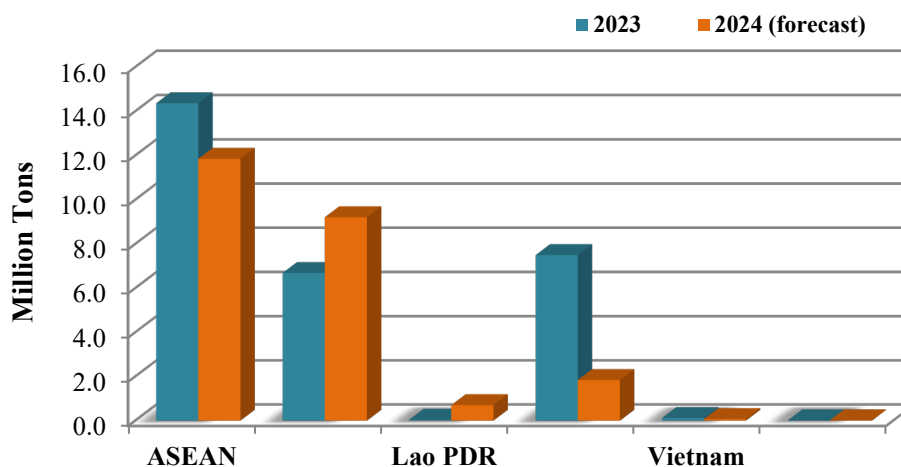


Figure 72 Amount of ending stock of cassava in ASEAN countries in 2023 – 2024

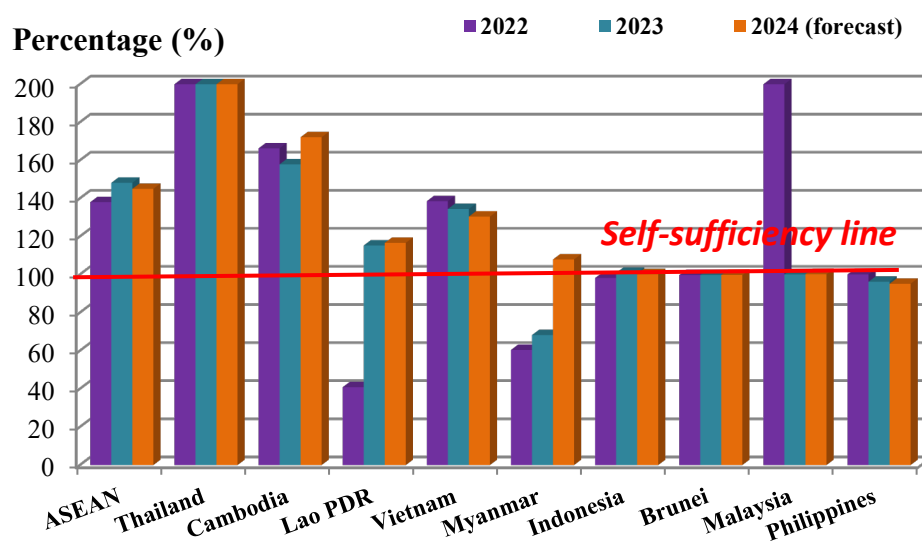


Figure 73 Ratio of cassava production to domestic utilization in ASEAN countries, 2022 – 2024

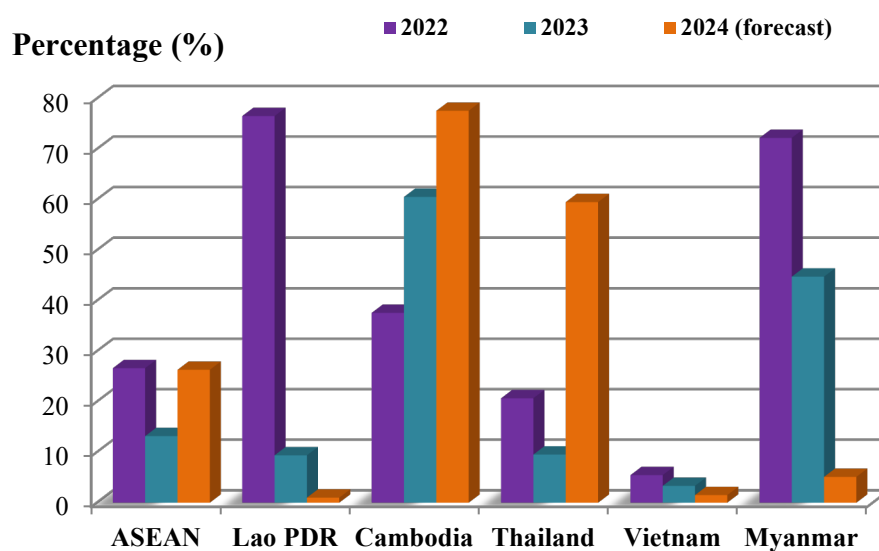


Figure 74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2022 – 2024

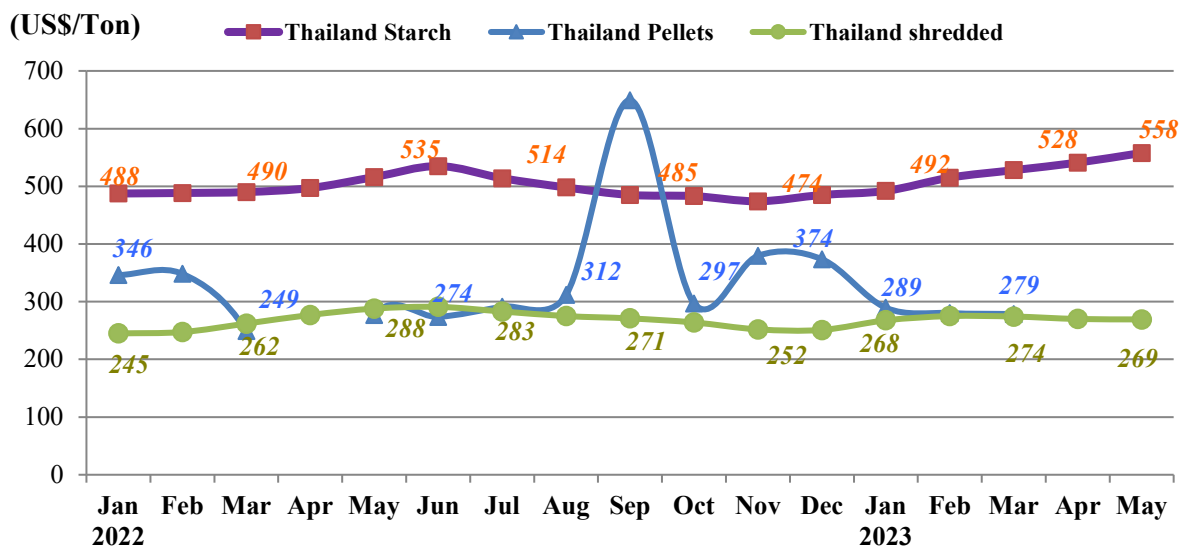


Figure 75 FOB price (US\$/Ton) of cassava of Thailand in 2022 – 2023

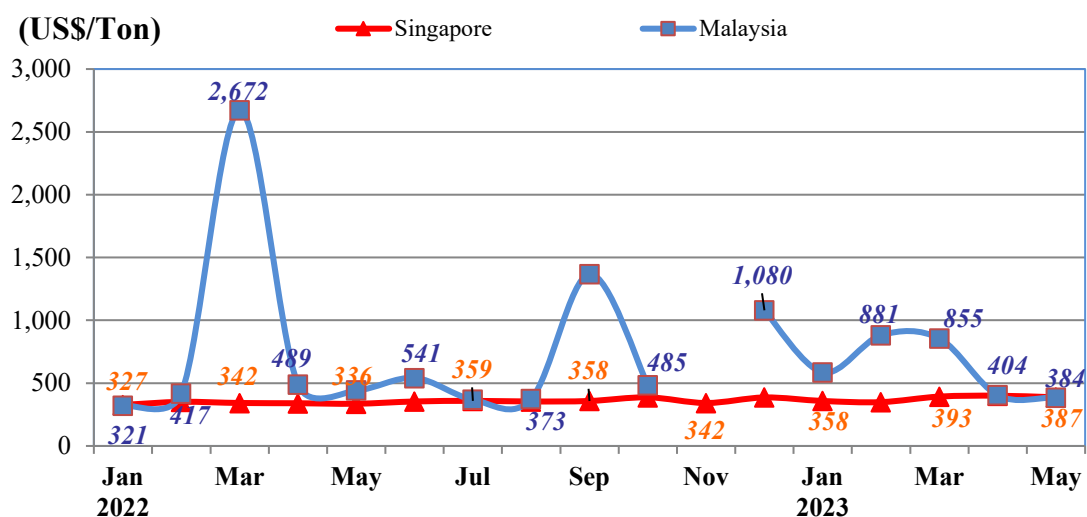


Figure 76 CIF price (US\$/Ton) of cassava selected countries in ASEAN in 2022-2023

Explanatory Notes

Production of Paddy for 2023

▶ **Brunei:**

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

▶ **Cambodia:**

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

▶ **Indonesia:**

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

▶ **Lao PDR:**

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

▶ **Malaysia:**

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

▶ **Myanmar:**

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

▶ **Philippines:**

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

▶ **Thailand:**

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

▶ **Vietnam:**

❖ **Spring-season**

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

❖ **Autumn-season**

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

❖ **Winter-season**

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

Production of Maize for 2023

▶ Brunei:

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

▶ Cambodia:

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

▶ Indonesia:

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

▶ Lao PDR:

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

▶ Myanmar:

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

▶ Philippines:

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

▶ Thailand:

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

▶ Vietnam:

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



Production of Sugarcane for 2023

▶ Brunei:

- The crop harvested during January to December 2023.

▶ Cambodia:

- The crop harvested during December 2022 to January 2023.

▶ Indonesia:

- The crop harvested during February to December 2023.

▶ Lao PDR:

- The crop harvested during February to May 2023.

▶ Myanmar:

- The crop harvested during October 2022 to June 2023.

▶ Philippines:

- The crop harvested during October 2022 to June 2023.

▶ Thailand:

- The crop harvested during December 2022 to April 2023.

▶ Vietnam:

- The crop harvested during November 2022 to May 2023.



Production of Soybean for 2023

▶ **Cambodia:**

- The crop harvested during September to October 2023.

▶ **Indonesia:**

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

▶ **Lao PDR:**

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

▶ **Myanmar:**

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

▶ **Philippines:**

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

▶ **Thailand:**

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

▶ **Vietnam:**

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

Production of Cassava for 2023

▶ Brunei:

- The crop harvested during January to December 2023.

▶ Cambodia:

- The crop harvested during November 2022 to January 2023.

▶ Indonesia:

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

▶ Lao PDR:

- The crop harvested during October to November 2023.

▶ Malaysia:

- The crop harvested during October 2022 to December 2023.

▶ Myanmar:

- The crop harvested during September 2022 to June 2023.

▶ Philippines:

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

▶ Thailand:

- The crop harvested during October 2022 to September 2023.

▶ Vietnam:

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

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

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

nil: Small amount



Milling Rate of Rice (2023)

Unit: Tons

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

Extraction rate of Sugar (2023)

Unit: Tons

Country	Sugarcane	Sugar
ASEAN	1,000	95.44
Cambodia	1,000	100.00
Indonesia	1,000	72.01
Lao PDR	1,000	200.00
Myanmar	1,000	79.94
Philippines	1,000	88.02
Thailand	1,000	117.79
Vietnam	1,000	100.00

Remark: The extraction rate of sugar from Thailand 2023 is change to 117.79 tons of sugar convert from 1000 tons of sugarcane, reported by Global Agricultural Information Network (GAIN).



ANNEX 1

Rice crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.31 report

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

ANNEX 2

Maize crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.31 report

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

ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.31 report

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

ANNEX 4

Soybean crop calendar (harvested months) for crop year 2022/23 (2023) in ACO No.31 report

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

ANNEX 5

Cassava crop calendar (harvested months) for crop year 2022/23(2023) in ACO No.31 report

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



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