



ASEAN FOOD SECURITY INFORMATION SYSTEM

ASEAN AGRICULTURAL COMMODITY OUTLOOK

No.33 DECEMBER 2024



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Report on

ASEAN Agricultural Commodity Outlook

No. 33 December 2024

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This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 33, 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.

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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

The ASEAN Agricultural Commodity Outlook (ACO) Report is a situation analysis of both the supply and demand of food crops for the current year and forecasts for the subsequent year, prepared by the ASEAN Food Security Information System (AFSIS) Secretariat. This report compiles data from the 10 ASEAN member states. As with previous editions, it covers the current situation and outlook for five main commodities: rice, maize, sugarcane, soybeans, and cassava.

In this preface of ASEAN Agricultural Commodity Outlook, we provide 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 shown 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 2025



The forecast for rice supply in ASEAN predicts to rise 13.73 million tons or 8.12 percent from 169.01 million tons in 2024 to 182.74 million tons in 2025 of milled rice (Table 1). This increase in supply is primarily attributed to the production and the beginning stock carried over from the previous year. The beginning stock is forecasted to increase by 10.29 million tons or 34.62 percent, increasing from 29.72 million tons in 2024 to 40.01 million tons in 2025. The rice production in 2025 is forecasted to be 132.79 million tons, increasing from 128.53 million tons in 2024, or 4.26 million tons increase. On the other hand, the import is forecasted to decrease by 0.82 million tons or 7.62 percent from 10.76 million tons in 2024 to 9.94 million tons in 2025.

The demand of rice is primarily attributed to the domestic utilization, export, and ending stock. The domestic utilization is forecasted to increase by 5.43 million tons or 4.94 percent from 109.84 million tons in 2024 to 115.27 million tons in 2025. The rice export is expected to increase 0.73 million tons or 3.81 percent from 19.17 million tons in 2024 to 19.90 million tons in 2025. The ending stock is expected to increase 7.57 million tons or 18.92 percent from 40.01 million tons in 2024 to 47.58 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2025 is expected to be 115.20 percent. Additionally, the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 34.71 percent in 2025 (Table 1).

Table 1 Summary of the ASEAN rice situation, 2024-2025 (milled rice)

Items	2024	2025	Unit: Million tons	
			Change	
			Quantity	%
Supply (Million tons)	169.01	182.74	13.73	8.12
Beginning stock	29.72	40.01	10.29	34.62
Production	128.53	132.79	4.26	3.31
Import	10.76	9.94	-0.82	-7.62
Demand (Million tons)	169.01	182.74	13.73	8.12
Domestic utilization	109.84	115.27	5.43	4.94
Export	19.17	19.90	0.73	3.81
Ending stock	40.01	47.58	7.57	18.92
Ratio of production to domestic utilization (%)	117.02	115.20	-1.82	-
Ratio of beginning stock to domestic utilization (%)	27.06	34.71	7.65	-

ASEAN Rice Situation in 2024

► Production

The estimated paddy production of ASEAN in 2024 (crop year 2023/24) reported at 199.49 million tons, marking a growth of 2.13 million tons or 1.08 percent compared to the 197.35 million tons recorded in 2023 (crop year 2022/23). This increasing was attributed to expansions in yield 0.04 ton/hectare or 0.92 percent from 4.33 ton/hectare in 2023 to 4.37 ton/hectare in 2024. The increase in production was observed in Cambodia and Myanmar (Table 2-5, Figure 1-4).

For **Brunei in 2024**, the production was decreased due to a reduction in planted area and yield. The decrease in planted area was affected by unfavorable weather, including the El Niño phenomenon, which caused a lower-than-average rainfall during the wet season. The decrease in yield was also affected by drought, pests, and diseases. Additionally, heavy rainfall led to flooding, exceeding average precipitation, and increased the risk of pests' infestation by the rice brown planthopper during the dry season.

For **Cambodia in 2024**, the production was increased due to an increase in planted area and yield. The increase in planted area was caused by favorable weather, rising rice prices, declining prices of competing crops, and government policies. Additionally, yield increased as farmers used more available fertilizer and adopted improved rice varieties.

For **Indonesia in 2024**, the production was decreased due to a reduction in planted area and yield. The decrease in planted area and yield was affected by unfavorable weather, including the drought and El Niño phenomenon, and competition with other commodities such as food crops and horticulture, which were mostly affected during the dry season.

For **Lao PDR in 2024**, the production was decreased due to a reduction in planted area and yield. The decrease in planted area was affected by the rise in prices of competing crops and unfavorable weather, including flooding during the wet season. Nevertheless, the yield was increased as farmers used more improved rice varieties combined with increased fertilizer.

For **Malaysia in 2024**, the production was decreased due to a reduction in planted area and yield. The decrease in planted area was affected by unfavorable weather. Additionally, the slight decrease in yield was affected by unfavorable weather, which was mostly affected during the dry season.

For **Myanmar in 2024**, the increase in production was attributed to the increase in planted area and yield. The increase in planted area was caused by the rising rice prices and declining prices of competing crops. The yield was increased due to favorable weather, and farmers' practices to use more improved rice varieties and continued to take better care of their crops although some damage was caused by flooding.

For **Philippines in 2024**, the decrease in production was attributed to the decrease in planted area and yield. The most decrease in production was observed during the dry season.

For **Thailand in 2024**, the production was decreased due to a reduction in planted area because farmers responded to the rising prices of competing crops. The yield slightly decreased due to unfavorable weather, including the El Niño phenomenon, which led to a lower-than-average water supply during the wet season.

For **Vietnam in 2024**, the decrease in the production was attributed to a reduction in planted area. The decrease in planted area was affected by unfavorable weather and government policies. Meanwhile, the yield was slightly increased as farmers

responded to the rising rice prices, taking better care of their crops, and favorable weather, despite some areas being affected by typhoons that led to flooding.

► **Utilization and Stock**

The estimated domestic utilization of rice (milled rice) in ASEAN in 2024 decreased by 4.91 million tons or 4.28 percent of 109.84 million tons from 114.75 million tons in 2023 (Table 7-8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2024 was estimated at 117.02 percent, an increase from 110.52 percent in 2023. The self-sufficiency ratio increased in Cambodia, Indonesia, Lao PDR, and Myanmar while decreases were in Brunei, Malaysia, Philippines, Thailand, and Vietnam. The highest ratio was found in Thailand, Cambodia and Vietnam (Table 10, Figure 12). However, on a country-by-country basis, some countries in the region still needed to import rice for their domestic consumption.

The ratio of the beginning stock to the domestic utilization (food security ratio) of ASEAN in 2024 was estimated at 27.06 percent as the optimum level, which slightly increased by 3.10 percent from 2023. The ratios of Myanmar, Thailand and Cambodia had higher than the optimum level. Myanmar had the highest ratio at 74.45 percent, which was followed by Thailand at 60.82 percent, and Cambodia at 41.46 percent while other countries were below of the optimum level. The beginning stock in 2024 of ASEAN was estimated at 29.72 million tons, increasing 2.23 million tons or 8.10 percent from 27.50 million tons in 2023 (Table 11, Figure 13).

In summary, ASEAN's paddy production for the 2023/24 crop year saw a modest growth of 1.08 percent from 2023, driven by increased yields in some countries, with notable improvements in Cambodia, Lao PDR, Myanmar, and Vietnam. However, adverse weather conditions, such as El Niño, affected

production in countries like Brunei, Indonesia, and Thailand, leading to decreased planted areas in some regions. Despite these challenges, ASEAN's rice production remained sufficient to meet domestic demand, with an increase in the self-sufficiency ratio. The region also saw a rise in beginning stocks, ensuring food security for the coming year, although some countries still required rice imports to fulfill domestic needs.

► **Trade**

In 2024, the entire ASEAN region exported 19.17 million tons of milled rice, marking a decrease of 0.49 million tons, or 2.47 percent, from 19.66 million tons in 2023. Additionally, the two major exporting countries, Vietnam and Thailand, exported approximately 9.48 and 8.00 million tons, respectively, in 2024 (Table 7-8 and Figure 5-6).

The total rice imports of ASEAN in 2024 was estimated to be 10.76 million tons, an increase of 0.95 million tons, or about 9.67 percent, from 9.81 million tons in 2023. In Philippines, the import of milled rice was estimated at 3.80 million tons in 2024, making it the largest importer in the ASEAN region (Table 7-8, Figure 8-9).

► **Prices**

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

Monthly FOB prices for rice exports and CIF prices for rice imports in selected ASEAN countries during 2023 and 2024 (January-December) are presented in Tables 14-15 and Figures 14-16.

► *Damage Area*

In 2024 (crop year 2023/24), the estimated damaged area of paddy of ASEAN amounted to 22,150 hectares. Of this, 21,302 hectares, or 96 percent, were attributed to flooding, while 781 hectares,

or 3 percent, were attributed to other factors. Myanmar bore the brunt of the flood damage, accounting for 16,044 hectares, or 72 percent. Additionally, factors such as drought, pests, and diseases contributed to the overall damage (Table 6).

Prospects for Rice in 2025

► *Production*

ASEAN paddy production in 2025 (crop year 2024/25) is estimated at 206.09 million tons, increasing by 6.60 million tons, which is 3.31 percent from 199.49 million tons in 2024 (Table 2-5, Figure 1-4).

► *Utilization and Stock*

The domestic utilization of milled rice in ASEAN in 2025 is expected to be 115.27 million tons, an increase of about 5.43 million tons, or 4.95 percent, compared to 109.84 million tons in 2024 (Table 8-9).

The beginning stock for 2025 is forecasted to be 40.01 million tons, an increase of 10.28 million tons, or 34.59 percent, from the 29.72 million tons recorded in 2024. Additionally, the ending stock is expected to rise by 7.57 million tons, or 18.92 percent, growing from 40.01 million tons in 2024 to 47.58 million tons in 2025 (Table 8-9 and Figure 11).

The ratio of production to domestic utilization (self-sufficiency ratio) is forecasted to be 115.20 percent in 2025, a decrease from 117.02 percent in 2024. **This indicates that rice production in some regions of ASEAN will still be sufficient, but some areas will need to import rice to meet domestic consumption** (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (**food security ratio**) in ASEAN in 2025 is forecasted to be 34.71 percent, an increase from 27.06 percent in 2024 (Table 11, Figure 13).

► *Trade*

The milled rice imports of ASEAN are forecasted to decrease from 10.76 million tons in 2024 to 9.94 million tons in 2025, a decrease of 0.82 million tons, or 7.58 percent (Table 8-9, Figures 8 and 10).

For the export, the whole ASEAN is forecasted to export 19.90 million tons in 2025, increase of 0.72 million tons or about 3.77 percent compared to 19.17 million tons in 2024 (Table 8-9, Figure 5 and 7).

Table 2 Paddy production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	2025 (2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	197,353.56	199,488.06	2,134.51	1.08	206,086.49	6,598.43	3.31
Brunei	3.73	3.62	-0.11	-2.98	3.91	0.29	8.15
Cambodia	12,497.23	13,889.56	1,392.33	11.14	*14,306.25	416.69	3.00
Indonesia	53,625.54	52,660.94	-964.60	-1.80	53,510.91	849.97	1.61
Lao PDR	3,900.20	3,860.80	-39.40	-1.01	4,018.00	157.20	4.07
Malaysia	2,175.15	2,143.15	-32.00	-1.47	2,137.45	-5.70	-0.27
Myanmar	27,990.92	30,434.06	2,443.14	8.73	*33,109.87	2,675.81	8.79
Philippines	20,038.91	*19,563.74	-475.17	-2.37	*19,381.37	-182.37	-0.93
Singapore	N/A						
Thailand	33,629.51	33,494.13	-135.38	-0.40	*34,871.17	1,377.04	4.11
Vietnam	43,492.38	43,438.07	-54.31	-0.12	44,747.57	1,309.50	3.01

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, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	2025 (2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	46,309.28	46,051.69	-257.60	-0.56	46,759.68	707.99	1.54
Brunei	1.53	1.49	-0.03	-2.07	1.54	0.04	3.00
Cambodia	3,549.35	3,856.33	306.97	8.65	*3,906.46	50.13	1.30
Indonesia	10,327.65	10,046.46	-281.19	-2.72	10,328.30	281.84	2.81
Lao PDR	1,003.37	949.91	-53.46	-5.33	956.03	6.12	0.64
Malaysia	614.08	604.87	-9.21	-1.50	602.56	-2.31	-0.38
Myanmar	7,094.92	7,180.50	85.58	1.21	*7,269.45	88.95	1.24
Philippines	*4,848.02	*4,744.00	-104.02	-2.15	*4,605.43	-138.57	-2.92
Singapore	N/A						
Thailand	11,751.07	11,555.77	-195.30	-1.66	*11,843.91	288.14	2.49
Vietnam	7,119.30	7,112.36	-6.94	-0.10	7,246.00	133.64	1.88

Remark: * The value is estimated by AFSIS Secretariat. N/A refers to data that is not available.**Table 4 Paddy harvested area in ASEAN countries, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	2025 (2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	45,604.26	45,610.13	5.87	0.01	46,420.37	810.24	1.78
Brunei	1.45	1.42	-0.03	-2.07	1.49	0.07	5.00
Cambodia	3,512.92	3,814.33	301.42	8.58	*3,879.18	64.84	1.70
Indonesia	10,213.71	10,046.46	-167.25	-1.64	10,328.30	281.84	2.81
Lao PDR	993.67	944.67	-49.01	-4.93	956.03	11.36	1.20
Malaysia	613.24	604.87	-8.37	-1.36	602.56	-2.31	-0.38
Myanmar	7,090.30	7,163.66	73.37	1.03	*7,239.93	76.27	1.06
Philippines	*4,848.02	*4,744.00	-104.02	-2.15	*4,605.43	-138.57	-2.92
Singapore	N/A						
Thailand	11,211.66	11,259.54	47.89	0.43	*11,561.45	301.90	2.68
Vietnam	7,119.30	7,031.17	-88.13	-1.24	7,246.00	214.83	3.06

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, 2023 – 2025

Unit: Ton/Hectare

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	2025 (2024/25)	
			Quantities	(%)		Quantities	(%)
ASEAN	4.33	4.37	0.04	0.92	4.44	0.07	1.60
Brunei	2.57	2.54	-0.03	-1.17	2.62	0.08	3.15
Cambodia	3.56	3.64	0.08	2.25	*3.69	0.05	1.37
Indonesia	5.25	5.24	-0.01	-0.19	5.18	-0.06	-1.15
Lao PDR	3.93	4.09	0.16	4.07	4.20	0.11	2.69
Malaysia	3.55	3.54	-0.01	-0.28	3.55	0.01	0.28
Myanmar	3.95	4.25	0.30	7.59	*4.57	0.32	7.53
Philippines	*4.13	*4.12	-0.01	-0.24	*4.21	0.09	2.18
Singapore	N/A						
Thailand	3.00	2.97	-0.03	-1.00	*3.02	0.05	1.68
Vietnam	6.11	6.18	0.07	1.15	6.18	0.00	0.00

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, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	21,302	29	22	17	781	-	22,150
Brunei	14	19	22	17	-	-	71
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR	5,244	-	-	-	-	-	5,244
Malaysia	-	-	-	-	-	-	-
Myanmar	16,044	10	-	-	781	-	16,835
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-	-

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

Table 7 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	27,496,629	126,827,439	9,810,876	164,134,944	114,752,879	19,658,086	29,723,978	164,134,944
Brunei	17,798	2,422	17,179	37,399	29,751	-	7,648	37,399
Cambodia	*1,646,059	7,998,228	-	9,644,287	6,384,115	656,323	2,603,849	9,644,287
Indonesia	4,064,238	34,331,071	2,715,858	41,111,167	36,975,209	1,559	4,134,399	41,111,167
Lao PDR	37,353	2,340,120	70,815	2,448,288	2,401,144	16,935	30,209	2,448,288
Malaysia	-	1,392,095	1,400,776	2,792,871	*2,669,422	123,449	-	2,792,871
Myanmar	12,247,491	*17,634,277	23	29,881,791	17,523,262	1,002,357	11,356,172	29,881,791
Philippines	*1,900,000	*13,000,000	*3,600,000	18,500,000	*16,400,000	-	2,100,000	18,500,000
Singapore	-	-	434,027	434,027	277,230	156,796	-	434,027
Thailand	4,580,470	21,859,179	15,749	26,455,398	10,970,250	8,769,044	6,716,104	26,455,398
Vietnam	3,003,220	28,270,047	1,556,449	32,829,716	21,122,496	8,931,623	2,775,597	32,829,716

Remark: * The value is estimated by AFSIS Secretariat.

Table 8 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	29,723,978	128,531,404	10,759,283	169,014,665	109,836,889	19,172,606	40,005,170	169,014,665
Brunei	7,648	2,350	27,149	37,147	29,709	-	7,438	37,147
Cambodia	*2,603,849	*8,889,320	-	11,493,169	6,280,895	669,449	4,542,825	11,493,169
Indonesia	4,134,399	33,617,043	3,267,455	41,018,897	33,920,599	582	7,097,716	41,018,897
Lao PDR	30,209	2,316,480	39,632	2,386,321	*2,325,149	35,120	26,052	2,386,321
Malaysia	-	1,371,616	1,392,016	2,763,632	*2,637,533	*126,099	-	2,763,632
Myanmar	11,356,172	*19,173,455	-	30,529,627	15,252,497	682,535	14,594,595	30,529,627
Philippines	*2,100,000	*13,155,212	*3,800,000	19,055,212	*16,900,000	-	2,155,212	19,055,212
Singapore	-	-	429,207	429,207	252,467	176,740	-	429,207
Thailand	6,716,104	21,771,183	8,145	28,495,432	11,042,150	8,000,000	9,453,282	28,495,432
Vietnam	2,775,597	28,234,745	1,795,679	32,806,021	21,195,890	9,482,081	2,128,050	32,806,021

Remark: * The value is estimated by AFSIS Secretariat.

Table 9 Rice balance sheet of ASEAN countries, 2025 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	40,005,170	132,791,906	9,943,312	182,740,388	115,269,086	19,896,300	47,575,002	182,740,388
Brunei	7,438	2,542	25,325	35,305	29,390	-	5,915	35,305
Cambodia	*4,542,825	*9,155,999	-	13,698,824	6,895,564	682,838	6,120,422	13,698,824
Indonesia	7,097,716	34,257,686	2,016,069	43,371,471	34,327,898	1,645	9,041,928	43,371,471
Lao PDR	26,052	2,410,800	-	2,436,852	*2,414,816	-	22,036	2,436,852
Malaysia	-	1,367,970	*1,383,310	2,751,280	*2,622,474	*128,806	-	2,751,280
Myanmar	14,594,595	*20,859,215	-	35,453,810	*18,786,795	*464,758	16,202,257	35,453,810
Philippines	*2,155,212	*12,985,515	*4,011,111	19,151,838	*17,415,244	-	1,736,594	19,151,838
Singapore	-	-	431,617	431,617	264,849	166,768	-	431,617
Thailand	9,453,282	22,666,258	*4,200	32,123,740	11,074,150	8,030,000	13,019,590	32,123,740
Vietnam	2,128,050	29,085,921	2,071,680	33,285,651	21,437,906	10,421,485	1,426,260	33,285,651

Remark: * The value is estimated by AFSIS Secretariat.

Table 10 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	126,827,439	114,752,879	110.52	128,531,404	109,836,889	117.02	132,791,906	115,269,086	115.20
Brunei	2,422	29,751	8.14	2,350	29,709	7.91	2,542	29,390	8.65
Cambodia	7,998,228	6,384,115	125.28	8,889,320	6,280,895	141.53	9,155,999	6,895,564	132.78
Indonesia	34,331,071	36,975,209	92.85	33,617,043	33,920,599	99.11	34,257,686	34,327,898	99.80
Lao PDR	2,340,120	2,401,144	97.46	2,316,480	2,325,149	99.63	2,410,800	2,414,816	99.83
Malaysia	1,392,095	2,669,422	52.15	1,371,616	2,637,533	52.00	1,367,970	2,622,474	52.16
Myanmar	17,634,277	17,523,262	100.63	19,173,455	15,252,497	125.71	20,859,215	18,786,795	111.03
Philippines	13,000,000	16,400,000	79.27	13,155,212	16,900,000	77.84	12,985,515	17,415,244	74.56
Singapore	-	277,230	-	-	252,467	-	-	264,849	-
Thailand	21,859,179	10,970,250	199.26	21,771,183	11,042,150	197.16	22,666,258	11,074,150	204.68
Vietnam	28,270,047	21,122,496	133.84	28,234,745	21,195,890	133.21	29,085,921	21,437,906	135.68

Table 11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	27,496,629	114,752,879	23.96	29,723,978	109,836,889	27.06	40,005,170	115,269,086	34.71
Brunei	17,798	29,751	59.82	7,648	29,709	25.74	7,438	29,390	25.31
Cambodia	1,646,059	6,384,115	25.78	2,603,849	6,280,895	41.46	4,542,825	6,895,564	65.88
Indonesia	4,064,238	36,975,209	10.99	4,134,399	33,920,599	12.19	7,097,716	34,327,898	20.68
Lao PDR	37,353	2,401,144	1.56	30,209	2,325,149	1.30	26,052	2,414,816	1.08
Malaysia	-	2,669,422	-	-	2,637,533	-	-	2,622,474	-
Myanmar	12,247,491	17,523,262	69.89	11,356,172	15,252,497	74.45	14,594,595	18,786,795	77.69
Philippines	1,900,000	16,400,000	11.59	2,100,000	16,900,000	12.43	2,155,212	17,415,244	12.38
Singapore	-	277,230	-	-	252,467	-	-	264,849	-
Thailand	4,580,470	10,970,250	41.75	6,716,104	11,042,150	60.82	9,453,282	11,074,150	85.36
Vietnam	3,003,220	21,122,496	14.22	2,775,597	21,195,890	13.09	2,128,050	21,437,906	9.93

Table 12 Quantity and Value of Rice Export by Countries of Destination in 2024

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			425	240,000					12.45	21,103				
Lao PDR														
Malaysia	0.88	1,829			83,985	52,721,860							0.50	823
Myanmar					855,690	111,609,000			22,471	13,099,000			104,798	55,484,000
Philippines	N/A													
Singapore	N/A													
Thailand	16,107	16,418,508	1,759	1,034,357	1,092,128	655,270,266	36,909	14,233,023	170,615	104,593,035	899	458,682	399,493	216,547,876
Vietnam			50,044	32,303,558	1,086,840	655,206,268			674,735	399,879,947			3,637,974	2,239,052,618

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	0.440	1,394,000					438	262,497	9	18,042	447	280,539
Lao PDR			363	196,061	28,566	12,043,116	28,929	12,239,177	6,192	4,322,089	35,120	16,561,266
Malaysia	29.57	31,156					84,016	52,755,667	50.11	17,675	84,066	52,773,343
Myanmar	1,311	729,000			1,820	946,000	986,090	181,867,000	855,010	311,067,001	1,841,100	492,934,001
Philippines	N/A											
Singapore	N/A											
Thailand	85,742	75,145,494			8,132	5,008,780	1,811,783	1,088,710,021	5,637,158	3,704,419,705	7,448,941	4,793,129,725
Vietnam	135,769	89,059,903					5,585,362	3,415,502,294	2,173,119	1,442,822,413	7,758,481	4,858,324,707

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 2024

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			19,530	-										
Cambodia	N/A													
Indonesia			25,000	16,250,000					0.45	568	359,288	227,496,514		
Lao PDR											402	50,806		
Malaysia			37,355	32,393,323	13	26,019					12,830	8,100,563		
Myanmar	N/A													
Philippines	N/A													
Singapore			11,539	9,275,636	0.53	1,708			45	59,721	3,395	1,840,844		
Thailand			0.0010	9.03			561	263,804			0.0120	55.81	0.0170	131.71
Vietnam			-	868,987,072			-	19,168,006			-	23,857,128		

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							19,530	-	-	-	19,530	-
Cambodia	N/A											
Indonesia	0.060	2.00	740,804	482,626,598	498,372	326,417,387	1,446,046	942,387,438	280,345.05	178,162,111	1,726,391	1,120,549,549
Lao PDR			14,982	4,188,379	687	384,399	16,071	4,623,584	12,897	8,732,522	28,968	13,356,106
Malaysia			160,300	101,616,768	133,969	88,251,120	327,701	214,266,464	377,089.82	239,267,613	704,790	453,534,077
Myanmar	N/A											
Philippines	N/A											
Singapore			128,601	115,593,685	185,551	122,448,143	332,269	251,427,667	138,433	111,888,945	470,702	363,316,612
Thailand	0.0010	4.68			586	383,094	586	383,141	2,714	76	3,300	383,217
Vietnam	-	1,992,375	-	2,738,330			-	484,876,520	-	124,639,226	-	609,515,746

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 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
		2024	950	940	950	940	930	950	945	945	909	935	890	909	933
	Organic Parboiled Rice Standard 5% broken	2023	1,170	1,170	1,170	1,170	1,160	1,120	1,170	1,155	1,050	1,170	1,160	1,170	1,153
		2024	1,220	1,210	1,220	1,230	1,250	1,200	1,200	1,250	1,100	1,150	1,150	1,100	1,190
Indonesia	Glutinous Rice	2023	2,982	809	650	1,958		598	13,668	2,538	3,710		1,869		3,198
		2024		2,600			2,408	3,613	909		3,115				2,600
Lao PDR	Milled rice quality 1	2023	456	525	542	467	488	660	414	387	248	397	288	355	436
		2024	477	412	474	382	535	576	572	508	511	312			456
Malaysia	Not specified	2023	370	351	352	354	345	350	365	360	373	512	550	504	399
		2024	521	540	545	588	614	628	606	619					549
Myanmar	Not specified	2023	416	424	427	455	487	495	508	511	542	573	570	562	498
		2024	573	582	588	595	575	567	576	535	514	505			585
Thailand	Thailand Hommati Rice 100%	2023	878	842	830	845	862	867	878	928	887	855	845	870	866
		2024	880	872	854	852	899	905	914	976	1,091	1,114			871
	White Rice 5%	2023	517	482	478	501	510	514	547	635	620	589	602	644	553
		2024	660	624	613	594	637	632	590	589	566	516			626
Vietnam	Not specified	2023	519	535	529	523	539	551	549	593	624	640	667	688	580
		2024	707	663	631	619	610	629	601	599	624	631			655

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	2023	491	510	510	556	558	559	568	572	601	640	647	638	571
		2024	636	653	656	647	628	617	599	578	570				648
Lao PDR	Milled rice quality 1	2023	106	130	117	448	410	493	502	503	485	282	347	229	338
		2024	492	246	382	393	340	371	528	417	610	596			371
Malaysia	Not specified	2023	574	576	551	509	501	545	552	546	600	621	639	646	572
		2024	628	647	664	637	635	619	640	674					644
Singapore	Not specified	2023	617	636	711	707	635	684	690	696	775	789	818	817	715
		2024	811	799	729	791	821	782	788	819	783	759	759	759	808

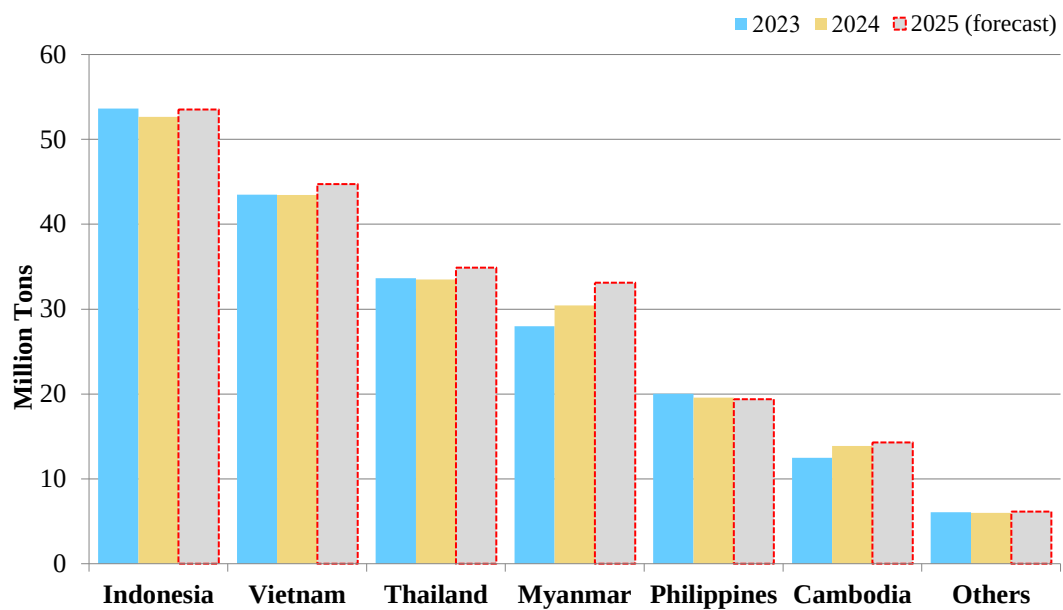


Figure 1 Paddy production of selected countries in ASEAN, 2023 – 2025

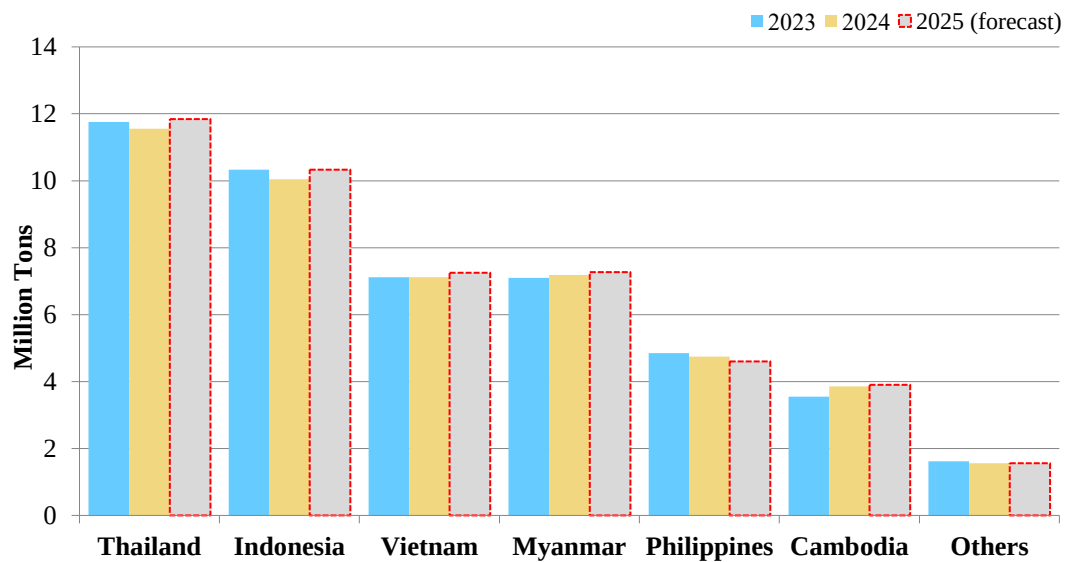


Figure 2 Paddy planted area of selected countries in ASEAN, 2023 – 2025

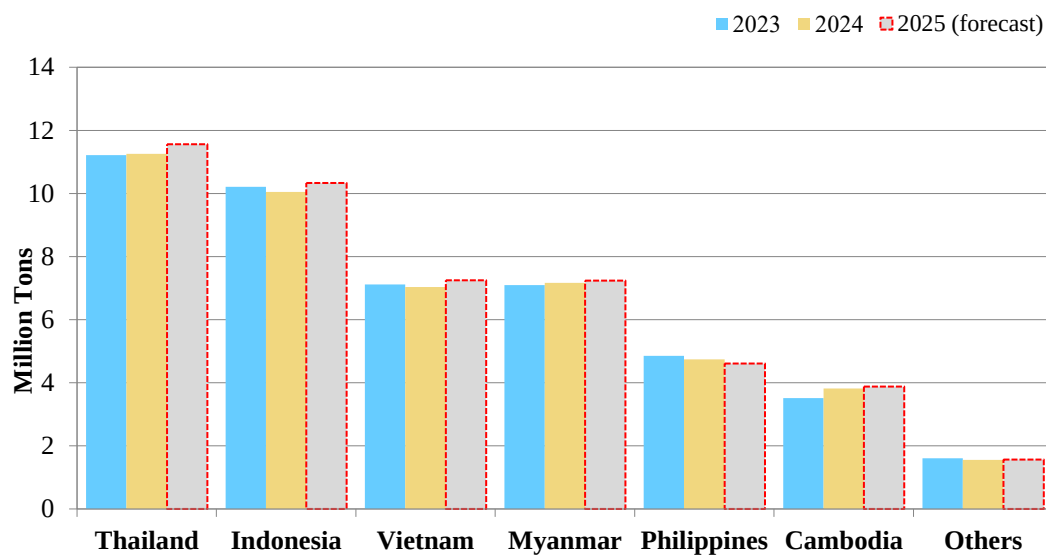


Figure 3 Paddy harvested area of selected countries in ASEAN, 2023 – 2025

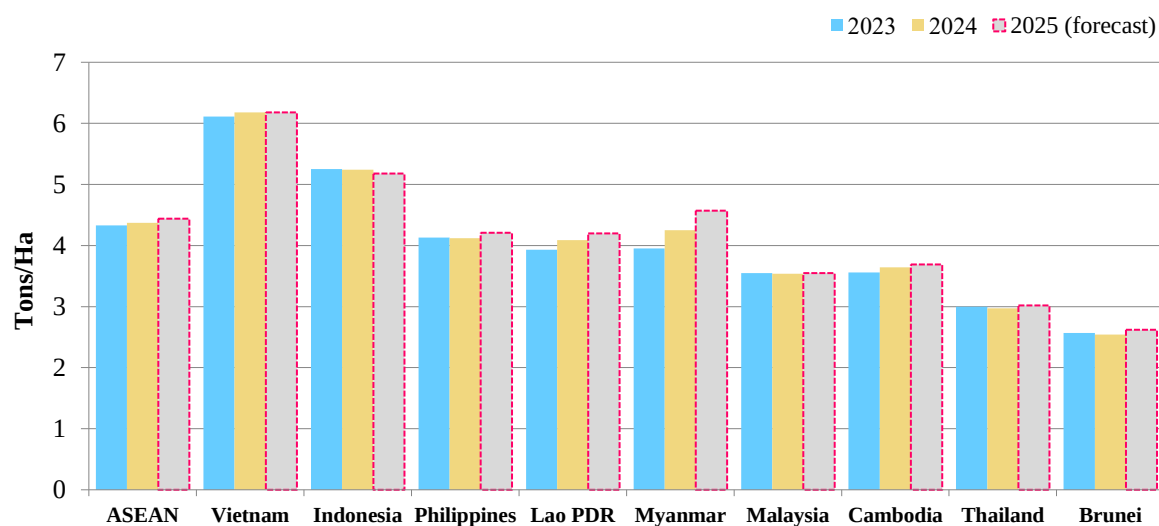


Figure 4 Paddy yield of selected countries in ASEAN, 2023 – 2025

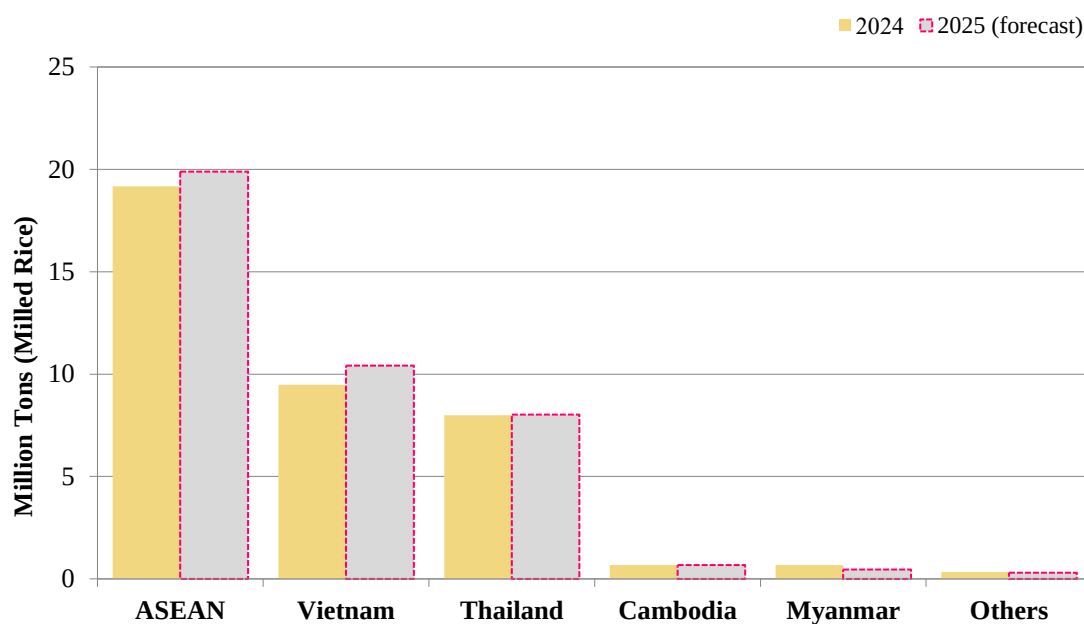
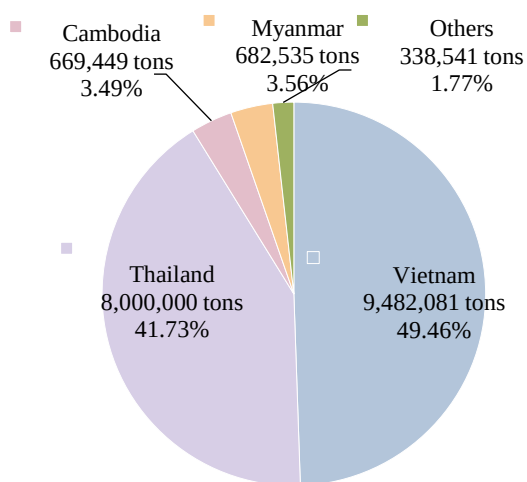
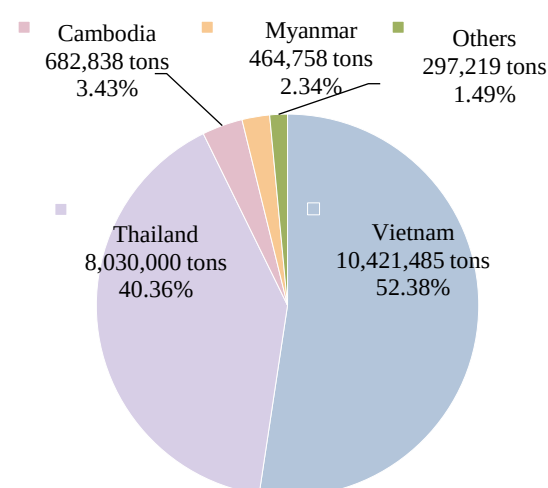


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 19.17 million tons

Figure 6 Share of rice export (tons) among ASEAN countries, 2024



Total 19.90 million tons

Figure 7 Share of rice export (tons) among ASEAN countries, 2025

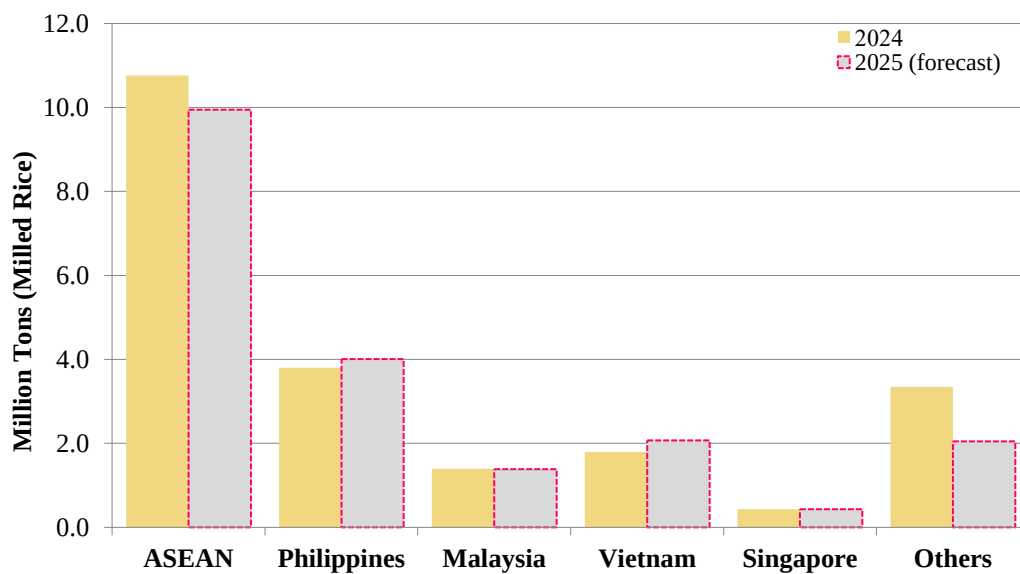


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2024 – 2025

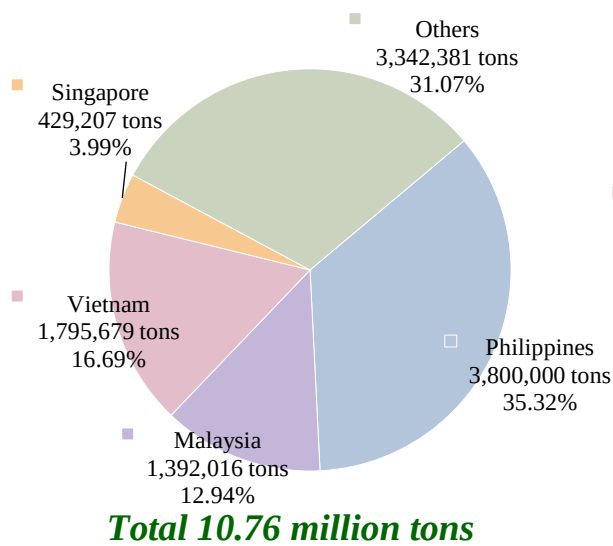


Figure 9 Share of rice import (tons) among ASEAN countries, 2024

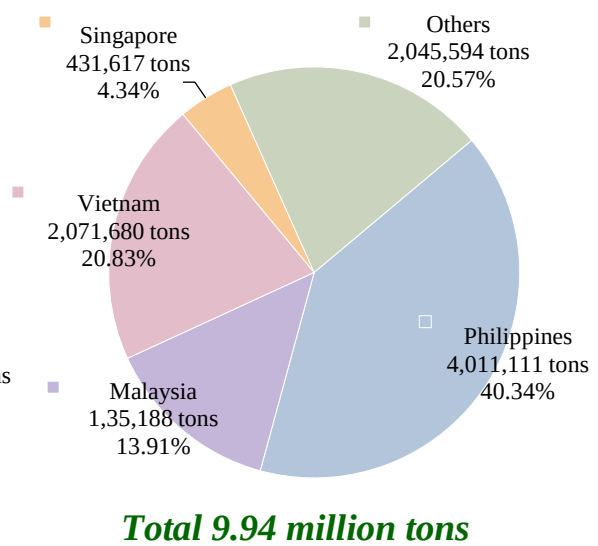


Figure 10 Share of rice import (tons) among ASEAN countries, 2025

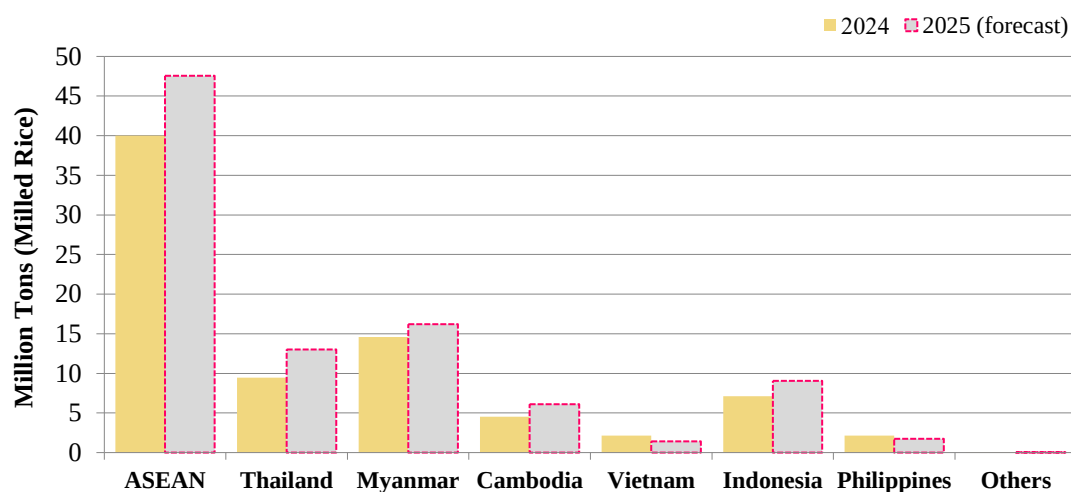


Figure 11 Amount of ending stock of rice in ASEAN countries, 2024 – 2025

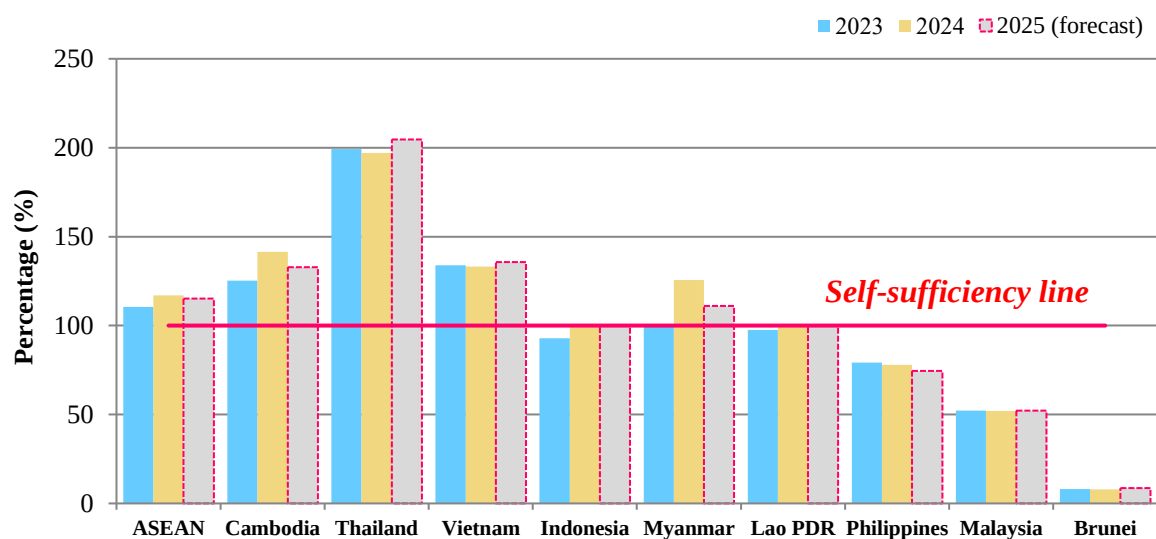


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2023 – 2025

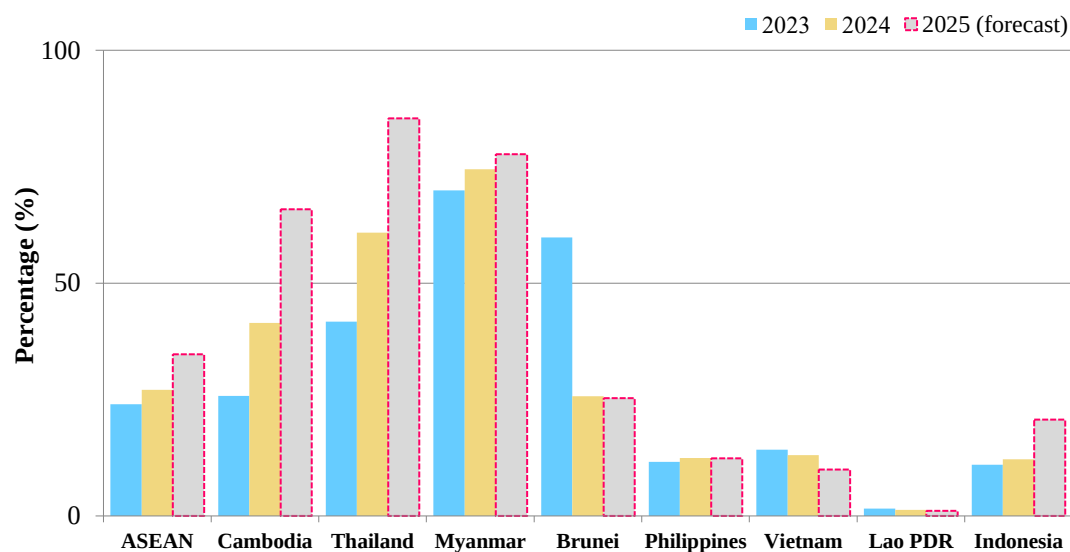


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

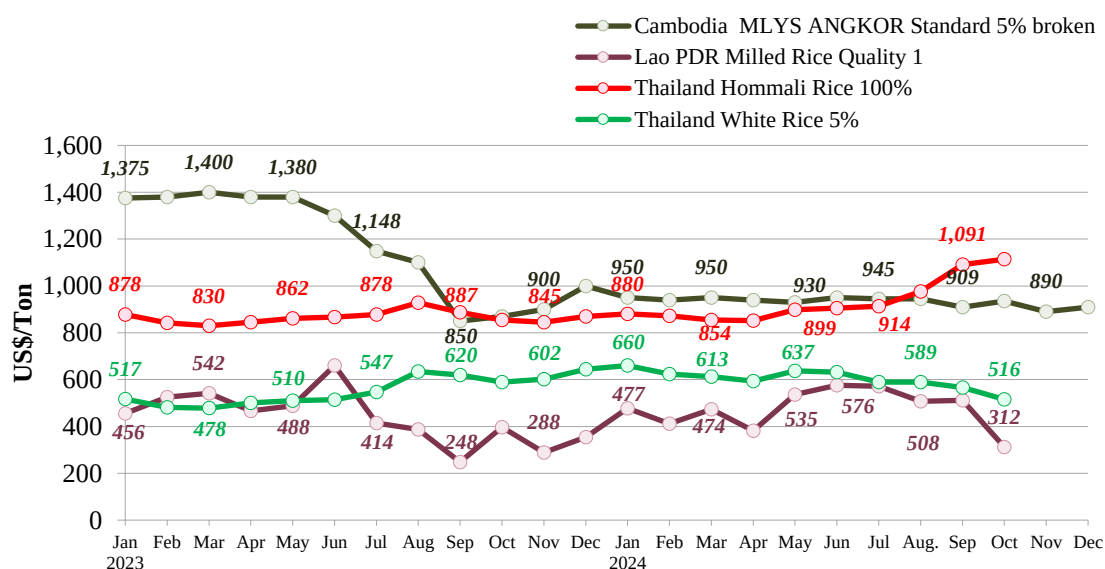


Figure 14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

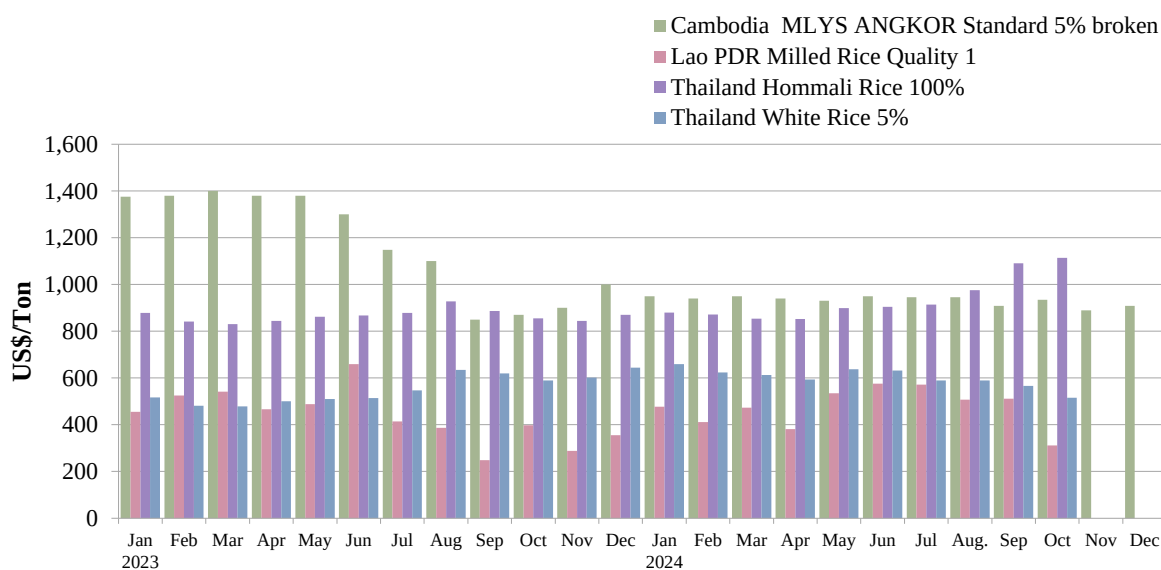


Figure 15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

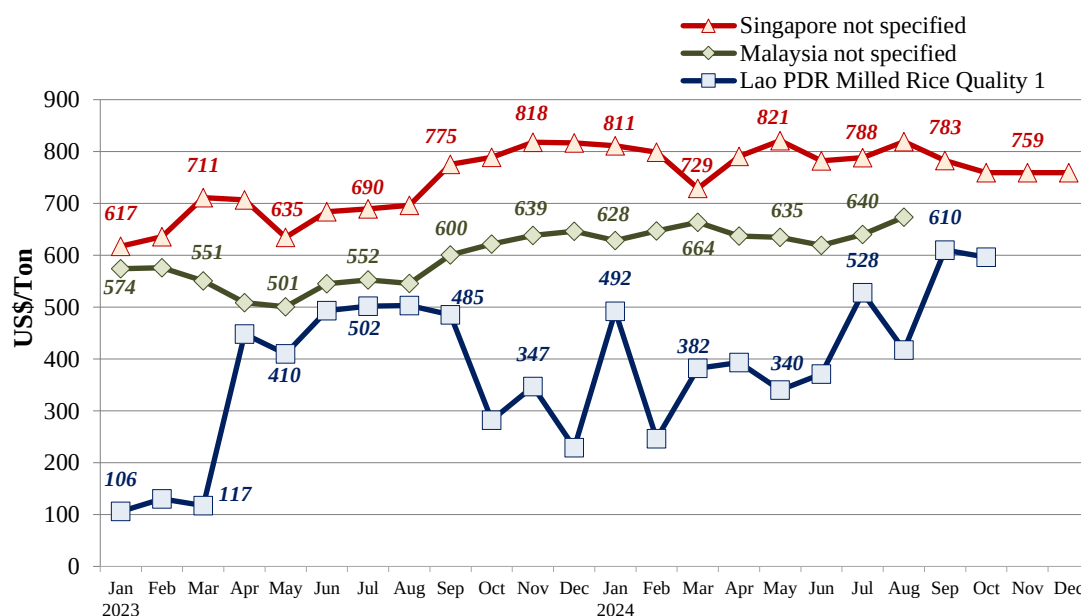


Figure 16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2023 – 2024

Maize Outlook for 2025



Highlight

The increase in ASEAN maize supply in 2025 is due to the increase in the beginning stock, production, and imports. The supply is forecasted to increase by 3.75 million tons or 5.86 percent from 64.03 million tons in 2024 to approximately 67.78 million tons in 2025 (Table 16). The forecast indicates that the maize beginning stock is expected to significantly increase by approximately 1.89 million tons or 35.59 percent from 5.31 million tons in 2024 to 7.20 million tons in 2025. The production of maize is forecasted to increase slightly by 0.16 million tons or 0.41 percent from 38.79 million tons in 2024 to 38.95 million tons in 2025. The import of maize is forecasted to increase by 1.69 million tons or 8.48 percent from 19.94 million tons in 2024 to 21.63 million tons in 2025.

The demand for maize in 2025 is expected to increase in the domestic utilization and ending stock. Accordingly, the domestic utilization is predicted to rise by 1.10 million tons or 2.01 percent from 54.74 million tons in 2024 to 55.84 million tons in 2025. The ending stock of maize is expected to significantly increase by 3.10 million tons or 43.06 percent from 7.20 million tons in 2024 to 10.30 million tons in 2025. However, the maize exports are projected to decrease by 0.45 million tons or 21.53 percent from 2.09 million tons in 2024 to 1.64 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to decrease by 1.11 percent from 70.86 percent in 2024 to 69.75 percent in 2025.

The beginning stock to domestic utilization ratio, referred to as the food security ratio, is expected to increase by 3.20 percent from 9.70 percent in 2024 to 12.90 percent in 2025.

Table 16 Summary of the ASEAN maize situation, 2024 – 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	64.03	67.78	3.75	5.86
Beginning stock	5.31	7.20	1.89	35.59
Production	38.79	38.95	0.16	0.41
Import	19.94	21.63	1.69	8.48
Demand (Million tons)	64.03	67.78	3.75	5.86
Domestic utilization	54.74	55.84	1.10	2.01
Export	2.09	1.64	-0.45	-21.53
Ending stock	7.20	10.30	3.10	43.06
Ratio of production to domestic utilization (%)	70.86	69.75	-1.11	-
Ratio of beginning stock to domestic utilization (%)	9.70	12.90	3.20	-

ASEAN Maize Situation in 2024

► **Production**

ASEAN maize production in 2024 (crop year 2023/24) was at 42.21 million tons, marking an increase of 0.81 million tons, or 1.97 percent, compared to 41.40 million tons in 2023 (crop year 2022/23). The increased production was driven by planted area and yield. The increase in production in 2024 was observed in Brunei, Cambodia, Indonesia, Lao PDR, Myanmar, and Vietnam (Tables 17-20, Figures 17-20).

For **Brunei in 2024**, the production increased due to the increase in planted area and yield. The yield was increased due to favorable weather, farmers' practices to use more improved maize varieties, take better care of their crops, and have more fertilizer available throughout the seasons.

For **Cambodia in 2024**, the increase in production was attributed to the increase in yield. The increase in yield resulted from increased fertilizer application and improved maize varieties. Meanwhile the decrease in planted area was a result of unfavorable weather in the dry season.

For **Indonesia in 2024**, the increase in production was attributed to the increase in yield. The increase in yield was influenced by favorable weather, farmers using more fertilizer and taking better care of their crops. Meanwhile the decrease in planted area was a result of farmers responding to declining prices of maize, unfavorable weather, especially the El Niño phenomenon, and competition with other food crops.

For **Lao PDR in 2024**, the production was increased due to planted area expansion. The increase in planted area was a result of farmers responding to an increase in maize prices and government policy. Meanwhile, the slight decrease in yield was caused by flooding during the wet season.

For **Myanmar in 2024**, the increase in production was attributed to the rise in both planted area and yield. The increase in planted area was influenced by farmers responding to a price increase. Similarly,

the increase in yield was influenced by farmers using more fertilizer and taking better care of their crops despite farmers facing flooding and pests' infestation.

For **Philippines in 2024**, the decrease in production was attributed to the decrease in planted area and yield.

For **Thailand in 2024**, the decrease in production was due to the decrease in planted area. The decrease in planted area was attributed to the rising prices of competing crops, the high cost of pesticides and maize seeds, poor-quality maize seeds, and the shift from annual crops to more valuable plants such as coffee, avocado, and perennial crops. Meanwhile, the yield was increased due to favorable weather during the wet season.

For **Vietnam in 2024**, the increase in production was due to the rise in yield. The increase in yield was due to farmers taking better care of their crops. Meanwhile, the decrease in planted area was affected by the rising prices of competing crops.

► **Utilization and Stock**

In 2024, maize utilization in ASEAN was estimated at 54.74 million tons, increasing of 1.86 million tons or 3.51 percent compared to 52.88 million tons in 2023 (Tables 22-23). The rise in domestic maize utilization was observed in Brunei, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam, despite decreases in Cambodia and Indonesia.

The beginning stock of maize in ASEAN in 2024 was at 5.31 million tons, a decrease of 1.50 million tons or 22 percent from 6.81 million tons in 2023 (Tables 22-23).

The ratio of maize production to domestic utilization for the entire ASEAN region in 2024 was estimated at 70.86 percent, showing an increase from 68.76 percent in 2023 (Table 25, Figure 28).

The ratio of beginning stock to domestic utilization (food security ratio) for the ASEAN decreased to 9.70 percent

in 2024 from 12.87 percent in 2023 (Table 26, Figure 29).

This suggests that ASEAN as a whole produced less maize than required for regional consumption. Maize production in some countries, like Cambodia, Indonesia, Lao PDR, and Myanmar, saw growth, and these countries had a high ratio above 100 percent. Additionally, beginning stocks decreased by 22 percent, while domestic utilization of maize rose by 3.51 percent. Moreover, ASEAN's production-to-utilization ratio improved to 70.86 percent. As a result, this indicates that maize production is still insufficient to meet the rising demand, resulting in some countries requiring imports to fill the gap.

Comparing to the world maize situation, maize production in 2024 is facing challenges due to lower-than-expected yields in regions like the European Union and the United States, as well as reduced sowing areas in some countries, including Argentina, due to adverse weather and competition from other crops. Weaker import demand from China and lower export volumes from major producers such as Brazil and the United States are further contributing to a decline in global maize trade, with the forecasted global maize trade down by 6.3 percent compared to the previous year (FAO Cereal Supply and Demand Brief, 2024).

► *Trade*

In 2024, ASEAN exported 2.09 million tons of maize, while importing 19.94 million tons (Table 23, Figure 21-22, 24-25). Myanmar is the largest exporter in ASEAN, which contributed 64.21 percent of the total ASEAN maize exports, amounting to 1.34 million tons (Table 23, Figure 21-22).

The primary importing countries in the region include Indonesia, Malaysia, Philippines, Thailand, and Vietnam (Table 23, Figures 24-25). Detailed information on the quantity and value of maize exported by destination countries, as well as the quantity and value of maize imported by origin countries, can be found in Tables 27-28.

► *Prices*

The monthly FOB prices for maize exporting countries and CIF prices for importing countries for 2023 and 2024 are shown in Tables 29-30 and Figures 30-31. Indonesia is one of the major importers of maize in ASEAN. The average FOB price for Indonesia in 2024 was \$794 per ton (January-April), an increase from \$555 per ton (January-December) in 2023. The average CIF price for Indonesia in 2024 was \$274 per ton (January-April), a decrease from \$307 per ton (January-December) in 2023.

► *Damaged Area*

The damaged area of maize in 2024 was at 9,395 hectares. Of this, 8,637 hectares were mainly affected by drought in Thailand, with additional damage from pests, diseases, flooding, and other factors in Myanmar and Thailand (Table 21).

Reference: Cereal trade revised downwards amid weaker demand [internet]. Italy: The Food and Agriculture Organization of the United Nations (FAO). Research; 2024 [cited 2025 Jan 6]. Available from: <https://www.fao.org/worldfoodsituation/csdb/en>

Prospects for Maize in 2025

► *Production*

Maize production in ASEAN in 2025 (crop year 2024/25) is estimated at 44.63 million tons, up from 42.21 million tons in 2024. The increase is observed in all ASEAN countries except Cambodia, Lao PDR, and Vietnam. The largest increase in terms of quantity was recorded in Indonesia, with production rising approximately 2.10 million tons in 2025 from 19.99 million tons in 2024 (Table 17).

For **Brunei in 2025**, the production is expected to increase due to the increase in planted area. The yield is also expected to increase due to favorable weather, farmers improving care of their crops, and using maize varieties. These are also expected to perform better during both the wet and dry seasons.

For **Indonesia in 2025**, the increase in production was attributed to an increase in both planted area and yield. The increase in planted area is due to rising maize prices, government policies, and favorable weather. Also, the increase in yield is influenced by favorable weather, farmers using more fertilizer and taking better care of their crops.

For **Lao PDR in 2025**, the decrease in production is attributed to the reduction

in both planted area and yield due to farmers using less fertilizer and an increase in the price of competing crops.

► *Utilization and Stock*

The domestic utilization of maize in ASEAN is forecasted to be 55.84 million tons in 2025, up from 54.74 million tons in 2024 (Table 23-24). The estimated beginning stock for 2025 is 7.20 million tons, which is an increase of 1.89 million tons from 5.31 million tons in 2024. The ratio of production to domestic utilization (self-sufficiency ratio) is expected to decrease to 69.75 percent in 2025, down from 70.86 percent in 2024 (Table 25, Figure 28). Meanwhile, the ratio of beginning stock to domestic utilization (food security ratio) is expected to be 12.90 percent in 2025, an increase from 9.70 percent in 2024 (Table 26, Figure 29).

► *Trade*

The maize export from ASEAN is expected to decrease to 1.64 million tons in 2025, down from 2.10 million tons in 2024. The forecast for maize imports by ASEAN in 2025 is 21.63 million tons, an increase from 19.94 million tons in 2024 (Table 23-24, Figure 21, 23, 24, and 26).

Table 17 Maize production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	41,396.55	42,211.46	814.91	1.97	44,626.48	2,415.02	5.72
Brunei	0.56	0.58	0.02	2.85	0.61	0.03	5.00
Cambodia	1,512.97	1,578.18	65.21	4.31	1,340.00	-238.18	-15.09
Indonesia	19,561.13	19,985.65	424.52	2.17	22,088.71	2,103.06	10.52
Lao PDR	458.48	682.30	223.82	48.82	637.40	-44.90	-6.58
Malaysia	N/A						
Myanmar	2,341.12	2,596.62	255.50	10.91	*2,904.69	308.07	11.86
Philippines	8,322.27	8,118.98	-203.29	-2.44	*8,171.75	52.77	0.65
Singapore	N/A						
Thailand	4,762.81	4,749.15	-13.66	-0.29	*4,983.33	234.18	4.93
Vietnam	4,437.20	4,500.00	62.80	1.42	4,500.00	0.00	0.00

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, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	7,942.06	7,948.73	6.67	0.08	8,102.33	153.60	1.93
Brunei	N/A						
Cambodia	277.18	*270.47	-6.71	-2.42	*246.81	-23.65	-8.75
Indonesia	2,498.08	2,476.09	-21.99	-0.88	2,636.51	160.42	6.48
Lao PDR	96.04	143.64	47.60	49.56	138.72	-4.91	-3.42
Malaysia	N/A						
Myanmar	601.26	649.63	48.37	8.04	*704.48	54.85	8.44
Philippines	*2,537.62	*2,490.10	-47.52	-1.87	*2,429.69	-60.41	-2.43
Singapore	N/A						
Thailand	1,047.27	1,035.46	-11.81	-1.13	*1,066.11	30.65	2.96
Vietnam	884.61	883.35	-1.26	-0.14	880.00	-3.35	-0.38

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, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	7,900.59	7,931.60	31.01	0.39	8,088.91	157.31	1.98
Brunei	N/A						
Cambodia	269.31	263.00	-6.31	-2.34	240.00	-23.00	-8.75
Indonesia	2,487.19	2,476.09	-11.10	-0.45	2,636.51	160.42	6.48
Lao PDR	96.04	143.37	47.33	49.28	138.72	-4.65	-3.24
Malaysia	N/A						
Myanmar	600.42	648.91	48.49	8.08	*703.90	54.99	8.47
Philippines	*2,537.62	*2,490.10	-47.52	-1.87	*2,429.69	-60.41	-2.43
Singapore	N/A						
Thailand	1,029.80	1,026.78	-3.02	-0.29	*1,060.09	33.31	3.24
Vietnam	880.20	883.35	3.15	0.36	880.00	-3.35	-0.38

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

Table 20 Maize yield in ASEAN countries, 2023 – 2025

Unit: Tons/Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	5.24	5.32	0.08	1.53	5.52	0.20	3.76
Brunei	N/A						
Cambodia	5.62	*6.00	0.38	6.76	*5.58	-0.42	-7.00
Indonesia	7.86	8.07	0.21	2.67	8.38	0.31	3.84
Lao PDR	4.77	4.76	-0.01	-0.21	4.59	-0.17	-3.57
Malaysia	N/A						
Myanmar	3.90	4.00	0.10	2.56	*4.13	0.13	3.25
Philippines	*3.28	*3.26	-0.02	-0.61	*3.36	0.10	3.07
Singapore	N/A						
Thailand	4.62	4.63	0.01	0.22	*4.70	0.07	1.51
Vietnam	5.04	5.09	0.05	0.99	5.11	0.02	0.39

Remark: N/A refers to data that is not available.**Table 21 Maize damaged area in ASEAN by cause of damage, 2024**

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	686	8,637	62	-	-	9	9,395
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	686	-	20	-	-	9	716
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	8,637	42	-	-	-	8,679
Vietnam	-	-	-	-	-	-	-

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

Table 22 Maize balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	6,805,061	36,361,312	17,428,312	60,594,685	52,881,306	2,405,509	5,307,871	60,594,685
Brunei	-	563	350	913	913	-	-	913
Cambodia	*470,289	1,512,970		1,983,259	872,255	71,548	1,039,456	1,983,259
Indonesia	2,770,423	14,445,893	1,227,406	18,443,722	17,395,341	92,052	956,329	18,443,722
Lao PDR	44,105	458,483	1,812	504,400	350,382	57,941	96,077	504,400
Malaysia	-	*80,000	*1,780,000	1,860,000	*1,858,064	1,936	-	1,860,000
Myanmar	2,148,550	2,341,120	5,617	4,495,287	1,211,362	1,817,214	1,466,711	4,495,287
Philippines	*400,000	8,322,271	*1,000,000	9,722,271	*8,700,000	-	1,022,271	9,722,271
Singapore	-	-	1,603	1,603	1,514	89	-	1,603
Thailand	149,246	4,762,812	*3,700,000	8,612,058	8,436,372	1,219	174,467	8,612,058
Vietnam	822,448	4,437,200	9,711,524	14,971,172	14,055,103	363,509	552,560	14,971,172

Remark: * The value is estimated by AFSIS Secretariat.**Table 23 Maize balance sheet of ASEAN countries, 2024**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,307,871	38,789,891	19,936,579	64,034,341	54,738,479	2,094,627	7,201,235	64,034,341
Brunei	-	579	546	1,125	1,125	-	-	1,125
Cambodia	*1,039,456	1,480,000	-	2,519,456	787,581	71,548	1,660,327	2,519,456
Indonesia	956,329	16,562,267	1,485,164	19,003,760	16,099,863	54,748	2,849,149	19,003,760
Lao PDR	96,077	682,300	13,816	792,193	561,412	202,717	28,064	792,193
Malaysia	-	*100,000	*1,770,000	1,870,000	*1,867,598	2,402	-	1,870,000
Myanmar	1,466,711	2,596,618	2,286	4,065,615	1,485,246	1,344,913	1,235,456	4,065,615
Philippines	1,022,271	8,118,978	*1,000,000	10,141,249	*9,500,000	-	641,249	10,141,249
Singapore	-	-	1,727	1,727	1,625	102	-	1,727
Thailand	174,467	4,749,149	*4,100,000	9,023,616	8,905,610	1,229	116,777	9,023,616
Vietnam	552,560	4,500,000	11,563,040	16,615,600	15,528,419	416,968	670,213	16,615,600

Remark: * The value is estimated by AFSIS Secretariat.**Table 24 Maize balance sheet of ASEAN countries, 2025**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	7,201,236	38,950,282	21,629,673	67,781,190	55,841,595	1,635,005	10,304,590	67,781,190
Brunei	-	608	573	1,181	1,181		-	1,181
Cambodia	*1,660,327	1,340,000		3,000,327	798,343	71,548	2,130,436	3,000,327
Indonesia	2,849,149	16,312,514	1,098,897	20,260,560	15,049,316	85,487	5,125,756	20,260,560
Lao PDR	28,064	637,400		665,464	465,444		200,020	665,464
Malaysia		*100,000	*1,760,056	1,860,056	*1,857,076	*2,980	-	1,860,056
Myanmar	1,235,456	2,904,686	*931	4,141,073	*1,836,118	*995,365	1,309,590	4,141,073
Philippines	641,249	8,171,749	*1,000,000	9,812,998	*9,500,000	-	312,998	9,812,998
Singapore	-		1,665	1,665	1,569	96	-	1,665
Thailand	116,777	4,983,325	*4,000,000	9,100,102	*8,910,000	*1,240	188,862	9,100,102
Vietnam	670,214	4,500,000	13,767,551	18,937,765	17,422,548	478,289	1,036,928	18,937,765

Remark: * The value is estimated by AFSIS Secretariat.

Table 25 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	36,361,312	52,881,306	68.76	38,789,891	54,738,479	70.86	38,950,282	55,841,595	69.75
Brunei	563	913	61.66	579	1,125	51.47	608	1,181	51.48
Cambodia	1,512,970	872,255	173.46	1,480,000	787,581	187.92	1,340,000	798,343	167.85
Indonesia	14,445,893	17,395,341	83.04	16,562,267	16,099,863	102.87	16,312,514	15,049,316	108.39
Lao PDR	458,483	350,382	130.85	682,300	561,412	121.53	637,400	465,444	136.94
Malaysia	80,000	1,858,064	4.31	100,000	1,867,598	5.35	100,000	1,857,076	5.38
Myanmar	2,341,120	1,211,362	193.26	2,596,618	1,485,246	174.83	2,904,686	1,836,118	158.20
Philippines	8,322,271	8,700,000	95.66	8,118,978	9,500,000	85.46	8,171,749	9,500,000	86.02
Singapore	-	1,514	-	-	1,625	-	-	1,569	0.00
Thailand	4,762,812	8,436,372	56.46	4,749,149	8,905,610	53.33	4,983,325	8,910,000	55.93
Vietnam	4,437,200	14,055,103	31.57	4,500,000	15,528,419	28.98	4,500,000	17,422,548	25.83

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), 2023 – 2025**

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	6,805,061	52,881,306	12.87	5,307,871	54,738,479	9.70	7,201,236	55,841,595	12.90
Brunei	-	913	-	-	1,125	-	-	1,181	-
Cambodia	470,289	872,255	53.92	1,039,456	787,581	131.98	1,660,327	798,343	207.97
Indonesia	2,770,423	17,395,341	15.93	956,329	16,099,863	5.94	2,849,149	15,049,316	18.93
Lao PDR	44,105	350,382	12.59	96,077	561,412	17.11	28,064	465,444	6.03
Malaysia	-	1,858,064	-	-	1,867,598	-	-	1,857,076	-
Myanmar	2,148,550	1,211,362	177.37	1,466,711	1,485,246	98.75	1,235,456	1,836,118	67.29
Philippines	400,000	8,700,000	4.60	1,022,271	9,500,000	10.76	641,249	9,500,000	6.75
Singapore	-	1,514	-	-	1,625	-	-	1,569	-
Thailand	149,246	8,436,372	1.77	174,467	8,905,610	1.96	116,777	8,910,000	1.31
Vietnam	822,448	14,055,103	5.85	552,560	15,528,419	3.56	670,214	17,422,548	3.85

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 2024

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														
Indonesia	-	-	-	-	-	-	-	-	83	108,421	-	-	0.0026	27
Lao PDR	N/A													
Malaysia	1.52	2,123	4.00	1,197	1	427,812	-	-	-	-	1,301.720	11	-	-
Myanmar	-	-	-	-	-	-	-	-	250	60,000	-	-	547,092	126,657,000
Philippines	N/A													
Singapore	N/A													
Thailand	N/A													
Vietnam	-	-	-	20,810,786	-	6,851,500	-	2,914,178	-	6,090	-	-	-	60,843,324

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	-	-	45,800	12,320,200	32,761	8,812,599	78,561	21,132,799	10	2,985	78,570	21,135,784
Indonesia	92	85,119	0.02	255	0.20	435	175	194,257	56	23,132	231	217,389
Lao PDR	-	-	115,040	18,867,006	65,559	14,777,761	180,599	33,644,767	22,118	7,445,950	202,717	41,090,717
Malaysia	-	54,248	71	269,318	915	3,684	2,294	758,392	108	122,911	2,402	881,303
Myanmar	213	51,000	1,779,610	429,732,000	-	-	2,327,165	556,500,000	425,790	97,698,000	2,752,955	654,198,000
Philippines	N/A											
Singapore	N/A											
Thailand	N/A											
Vietnam	-	2,476,621	-	-	-	-	-	93,902,499	-	3,295,697	-	97,198,196

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 2024

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia	-	-	-	-	-	-	-	-	0.0020	3.00	-	-	0.20	2,333
Lao PDR	N/A													
Malaysia	-	-	-	-	7.30	15,725	-	-	-	-	-	-	-	-
Myanmar	N/A													
Philippines	N/A													
Singapore	-	-	-	-	569	502,534	-	-	299	300,767	30.00	7,799	1.68	724
Thailand	-	-	7,750	2,243,044	-	-	254,343	63,199,798	-	-	1,750,024	476,045,275	-	-
Vietnam	-	-	-	-	-	-	76,936	19,179,444	-	-	2,000	540,000	-	-

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	0.0030	56	181	638,260	-	-	181	640,652	660,614	178,835,061	660,795	179,475,713
Lao PDR	-	-	571	169,402	3,050.00	1,395,638.00	3,621	1,565,040	10,195	2,927,383	13,816	4,492,423
Malaysia	7.50	16,128	225	778,388	-	-	240	810,241	1,048,557	290,996,295	1,048,797	291,806,536
Myanmar			3,116	13,423,000	-	-	3,116	13,423,000	200	938,100	3,316	14,361,100
Philippines	N/A											
Singapore	-	-	22	41,153	0.14	502	922	853,479	805	1,212,352	1,727	2,065,831
Thailand	-	-	-	-	-	-	2,012,117	541,488,116	-	-	2,012,117	541,488,116
Vietnam	-	-	3,552	12,876,730	-	-	82,488	32,596,174	9,550,314	2,312,108,172	9,632,802	2,344,704,346

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
Cambodia	2023	300	300	304	304	300	310	310	302	305	305	304	304	304
	2024	305	305	304	304	250								269
Indonesia	2023	305	308	326	338	686	733	835	843	841	614	429	400	555
	2024	829	500	677	1,168									794
Lao PDR	2023	125	152	182	147	123	128	121	144	120	250	283	319	174
	2024	283	180	173	201	179	129	186	249	120	254			196
Malaysia	2023	977	370	456	746	905	386	841	701	340	343	331	316	559
	2024	305	974	411	415	1,381	330	316	311					555
Myanmar	2023	302	319	319	310	309	308	297	288	277	264	248	250	291
	2024	245	241	230	225	225	235	251	261	267	254			244
Thailand	2023	407	403	375	381	380	367	347	338	318	301	289	299	350
	2024	299	294	291	281	296								292

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	2023	337	348	347	336	343	341	303	297	260	258	258	263	307
	2024	271	290	275	260									274
Lao PDR	2023	415	380	496	436	505	427	229	311	400	284	321	265	372
	2024	298	321	384	313	500	312	401	297	385	302			351
Malaysia	2023	348	329	349	324	326	336	341	275	314	248	277	255	310
	2024	255	262	279	255	254	234	267	265					259
Myanmar	2023	4,100	3,931	3,970	4,006	3,736	3,855		7,963	4,507	7,458	3,914	4,118	4,687
	2024		4,590	3,021	3,778	4,024	4,690	5,451	7,089	3,936	3,995			4,508
Singapore	2023	1,236	1,480	1,023	1,243	1,426	1,180	1,580	1,110	963	2,409	1,233	1,285	1,347
	2024	1,469	1,130	1,222	1,281	912	1,115	1,271	1,122	1,335	1,202	1,202	1,202	1,205
Vietnam	2023	335	338	340	338	329	310	296	289	274	266	261	257	303
	2024	255	255	248	253	247	243	240	239	233	233			245

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.

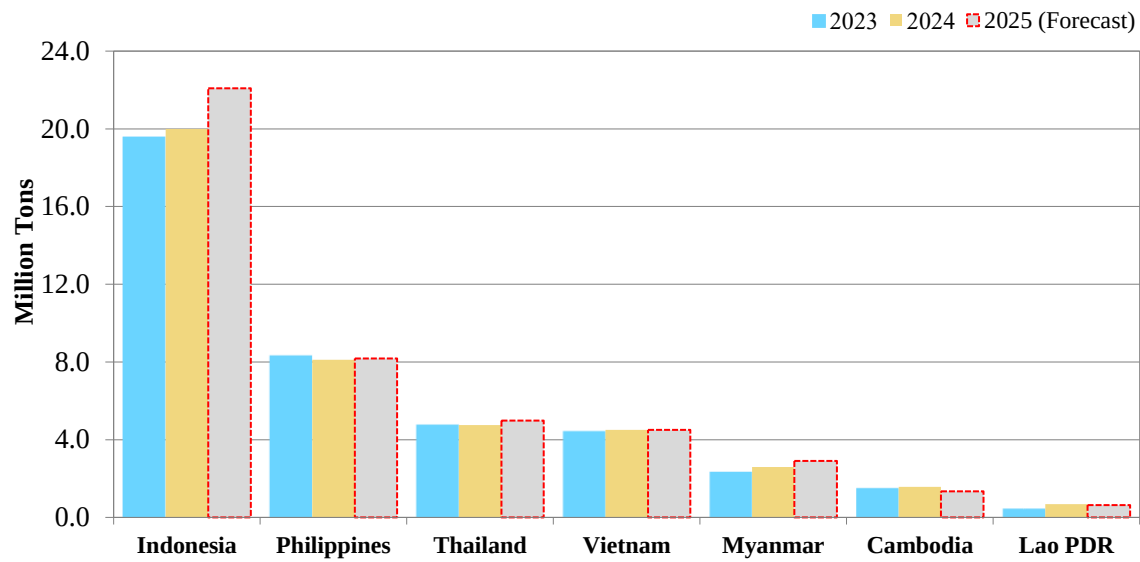


Figure 17 Maize production of selected countries in ASEAN, 2023 – 2025

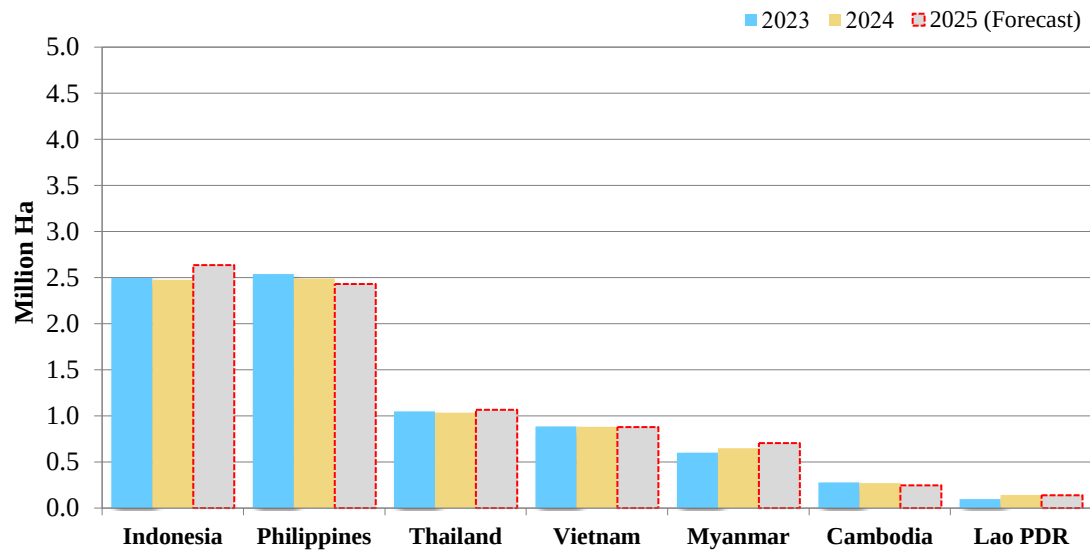


Figure 18 Maize planted area of selected countries in ASEAN, 2023 – 2025

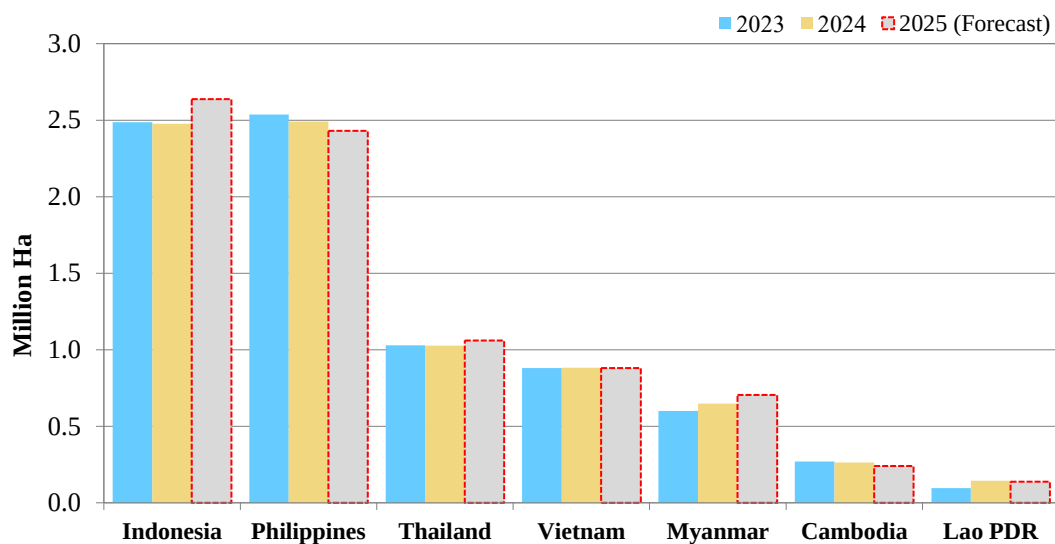


Figure 19 Maize harvested area of selected countries in ASEAN, 2023 – 2025

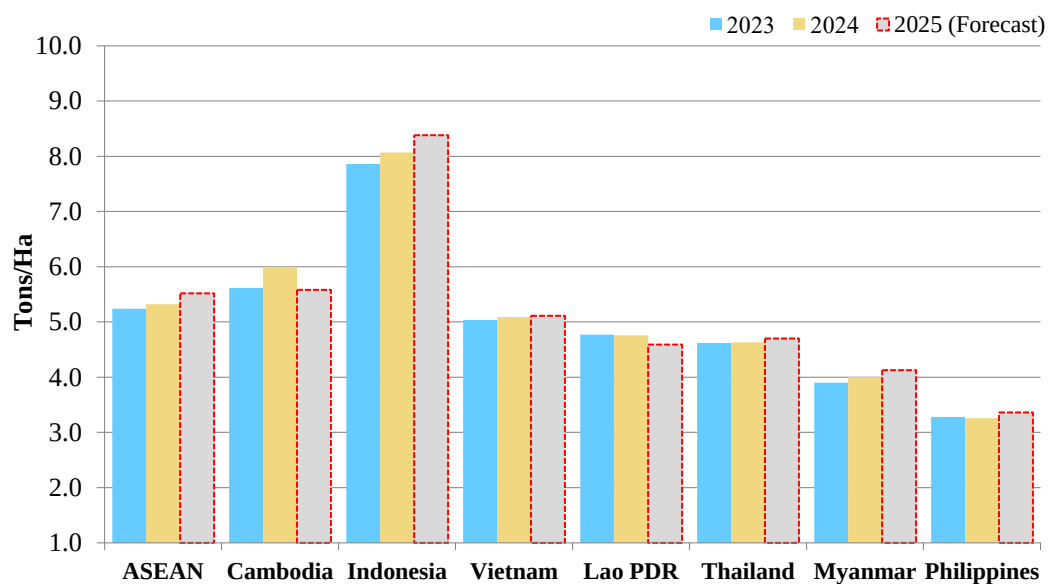


Figure 20 Maize yield of countries in ASEAN, 2023 – 2025

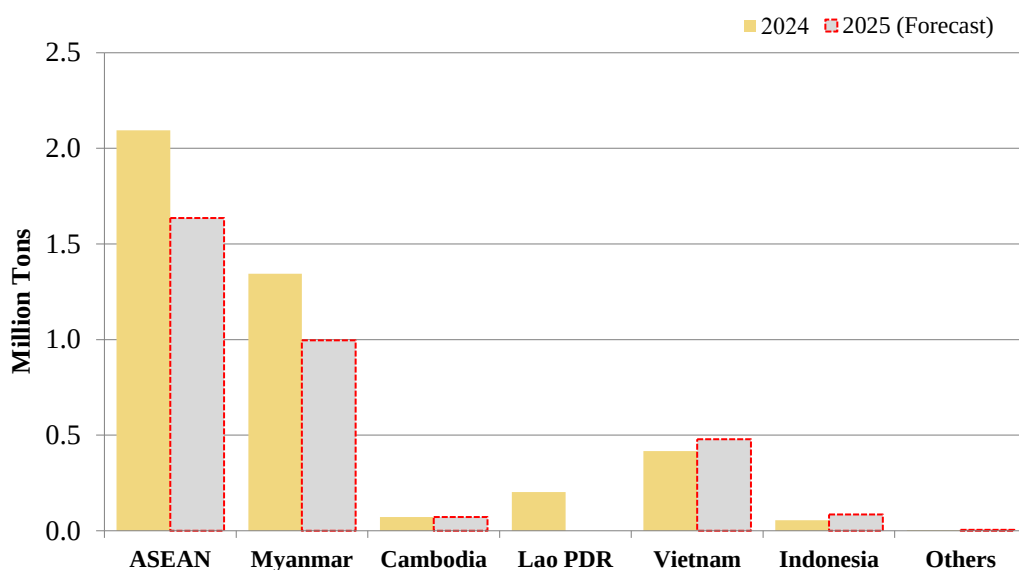
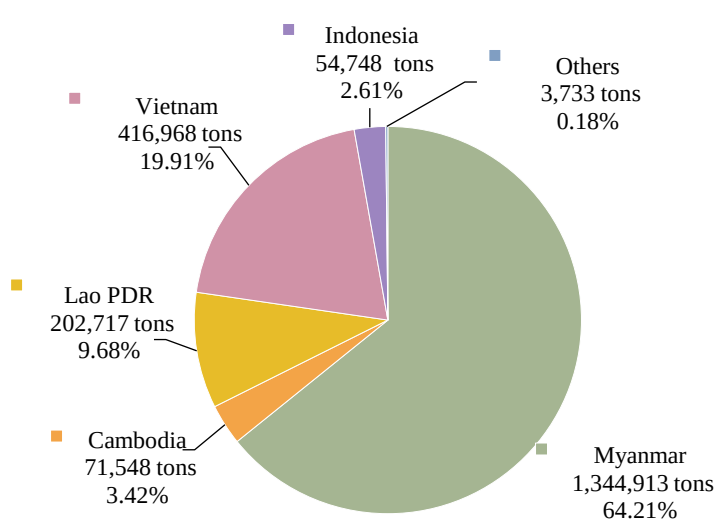
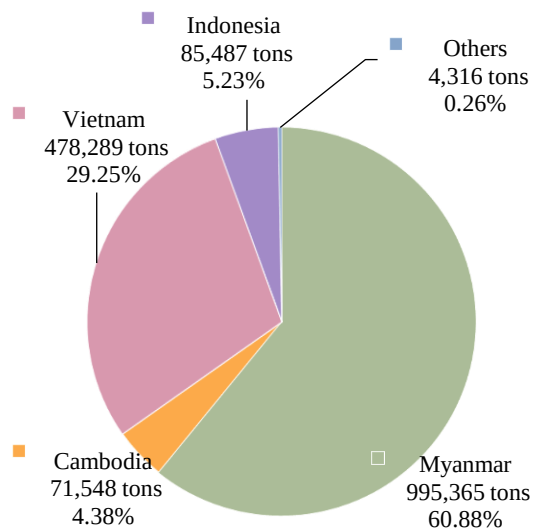


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 2.09 million tons

Figure 22 Share of maize export (tons) among ASEAN countries, 2024



Total 1.64 million tons

Figure 23 Share of maize export (tons) among ASEAN countries, 2025

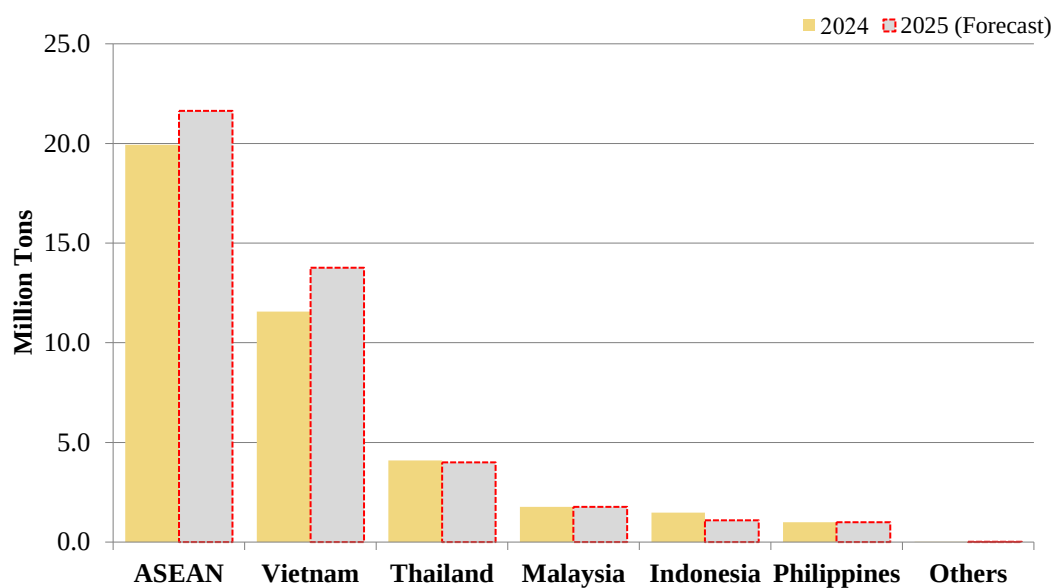


Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2024 – 2025

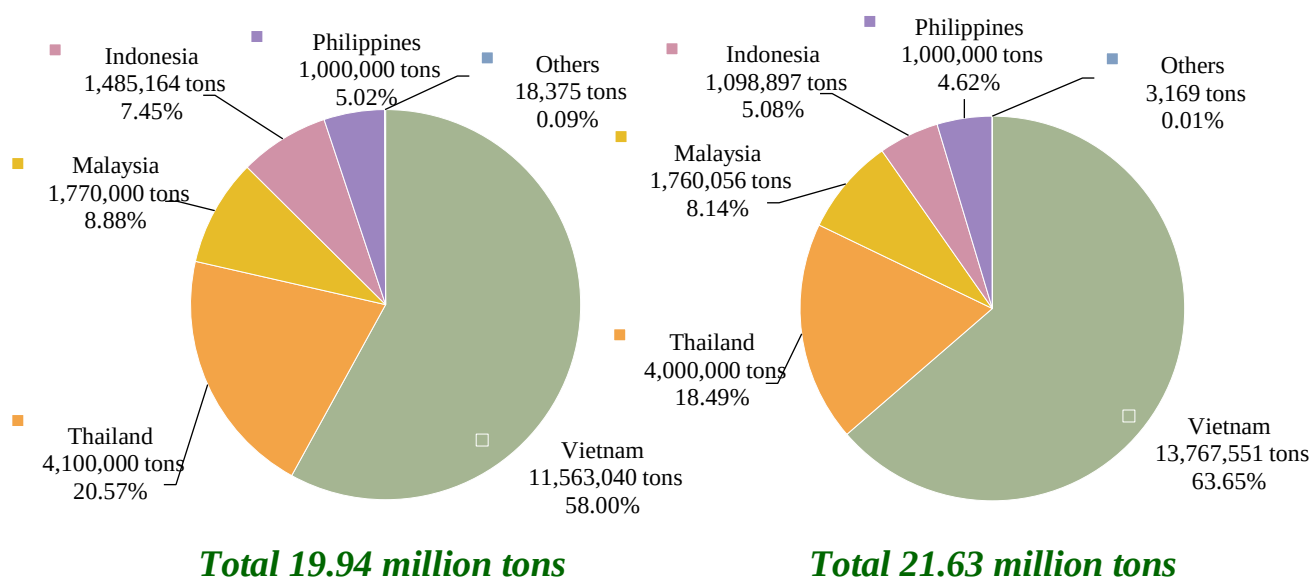


Figure 25 Share of maize import (tons) among ASEAN countries, 2024

Figure 26 Share of maize import (tons) among ASEAN countries, 2025

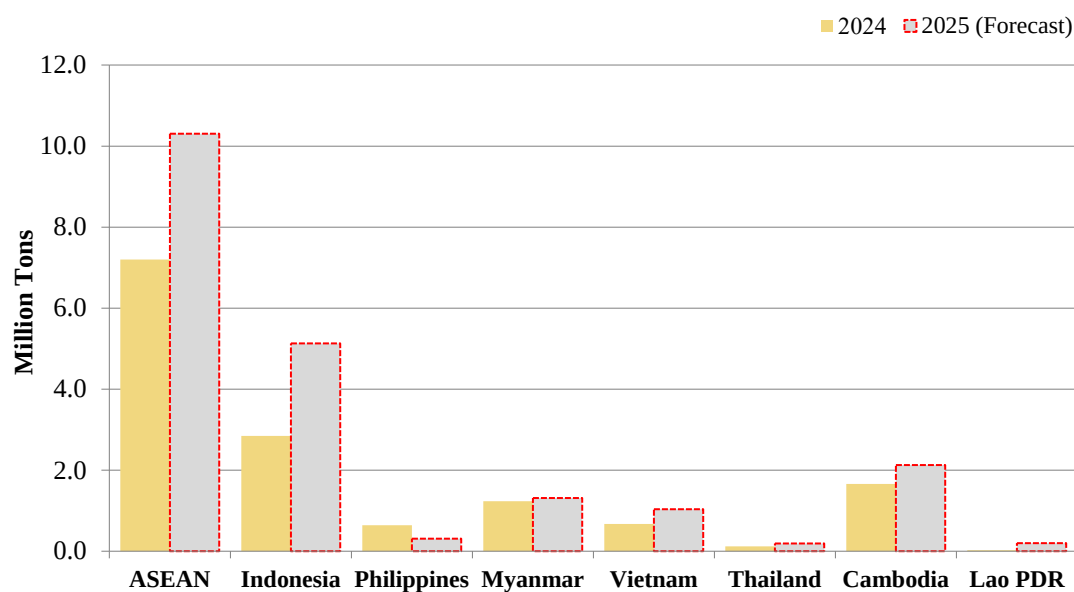


Figure 27 Amount of ending stock of maize in ASEAN countries in 2024 – 2025

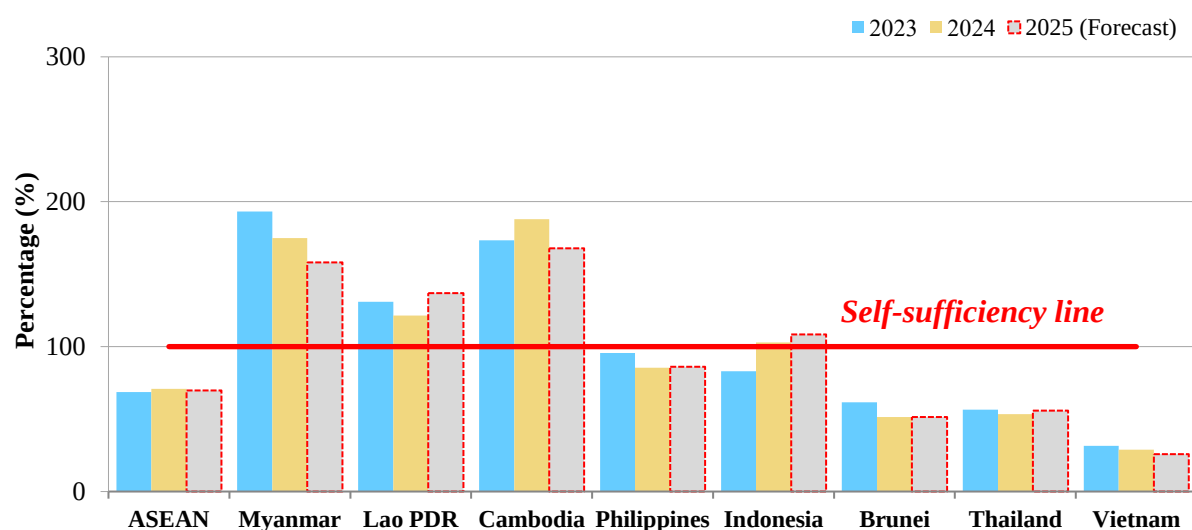


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2024 – 2025

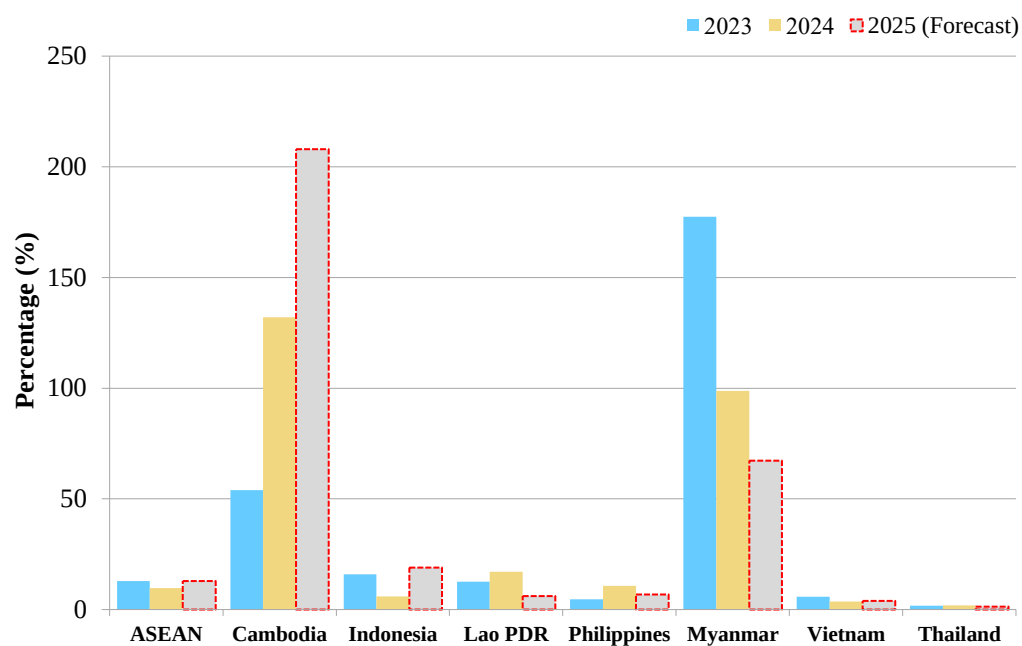


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

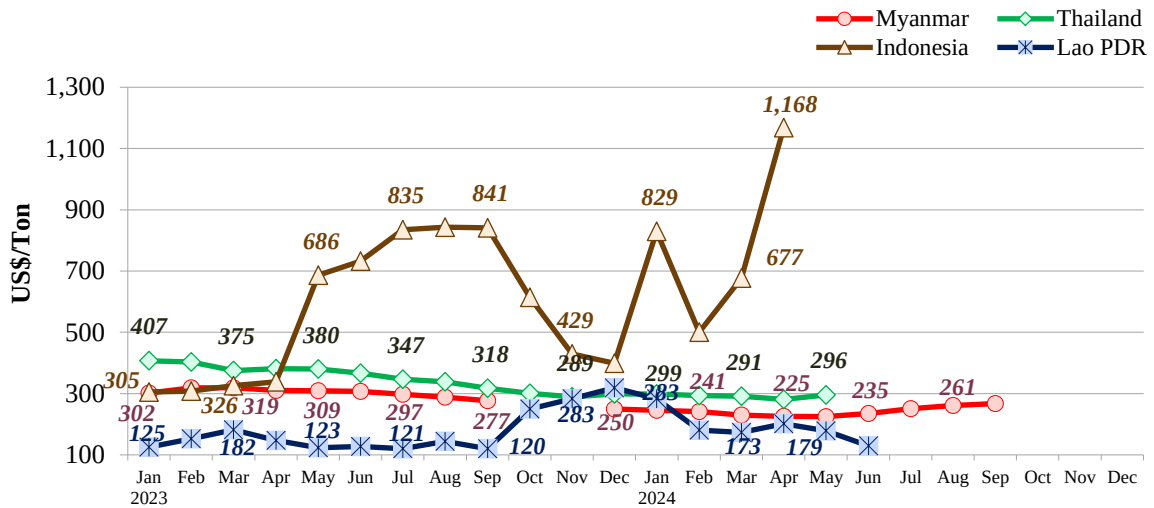


Figure 30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2023 – 2024

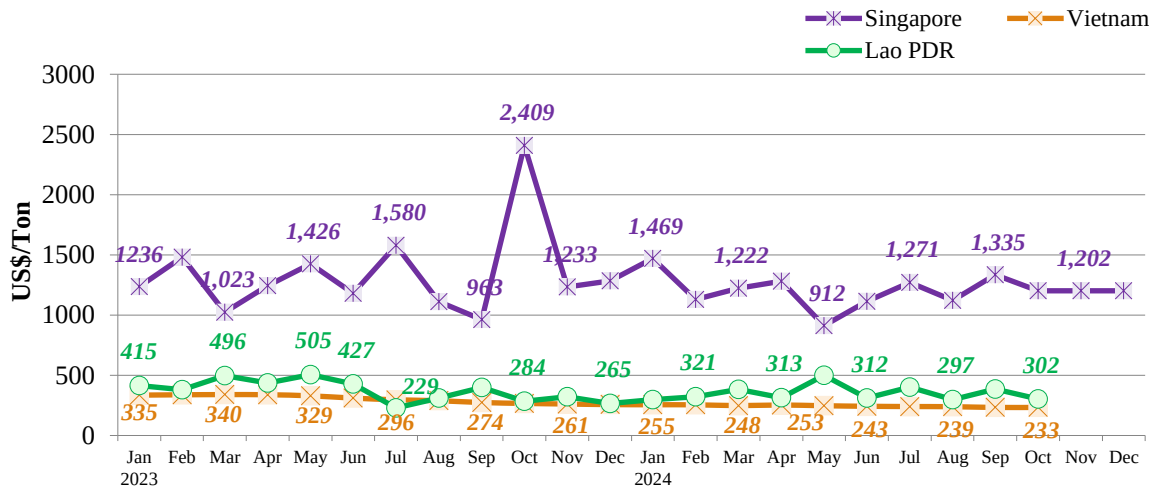


Figure 31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2023 – 2024

Sugar Outlook for 2025



ASEAN sugar supply is forecasted to increase by approximately 2.53 million tons or 6.45 percent from 39.23 million tons in 2024 to 41.76 million tons in 2025, due to the increase in beginning stock, production and import (Table 31).

The beginning stock of sugar is forecasted to increase by 0.75 million tons or 5.26 percent from 14.25 million tons in 2024 to 15 million tons in 2025. The sugar production is forecasted to increase by 1.30 million tons or 8.12 percent from 16.01 million tons in 2024 to 17.31 million tons in 2025. The sugar imports in 2025 are forecasted to slightly increase by approximately 0.48 million tons or 5.35 percent from 8.97 million tons in 2024 to 9.45 million tons in 2025.

ASEAN sugar demand is forecasted to increase by the domestic utilization and ending stock. The domestic utilization is forecasted to increase by 0.53 million tons or 3.22 percent from 16.46 million tons in 2024 to 16.99 million tons in 2025. The export of sugar from ASEAN in 2025 is expected to decline by 0.35 million tons or 4.50 percent from 7.77 million tons in 2024 to 7.42 million tons 2025. The ending stock is forecasted to rise by 2.35 million tons or 15.67 percent from 15 million tons in 2024 to 17.35 million tons in 2025.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2025 is forecasted to be 101.90 percent, which increases from 97.27 percent in 2024.

The beginning stock to domestic utilization ratio (food security ratio) in 2025 is forecasted to be 88.28 percent, which increases from 86.56 percent in 2024.

Table 31 Summary of the ASEAN sugar situation, 2024 – 2025

Unit: Million Tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	39.23	41.76	2.53	6.45
Beginning stock	14.25	15.00	0.75	5.26
Production	16.01	17.31	1.30	8.12
Import	8.97	9.45	0.48	5.35
Demand (Million tons)	39.23	41.76	2.53	6.45
Domestic utilization	16.46	16.99	0.53	3.22
Export	7.77	7.42	-0.35	-4.50
Ending stock	15.00	17.35	2.35	15.67
Ratio of production to domestic utilization (%)	97.27	101.90	4.63	-
Ratio of beginning stock to domestic utilization (%)	86.56	88.28	1.72	-

ASEAN Sugar Situation in 2024

► **Production**

The sugarcane production in ASEAN for 2024 (crop year 2023/24) was at 165.57 million tons, representing a decrease of 7.97 million tons, or 4.59 percent, compared to 173.54 million tons in 2023 (crop year 2022/2023) (Table 32, Figure 32). The countries that saw a decline in production include Lao PDR and Thailand. However, production increased in Brunei, Cambodia, Indonesia, Myanmar, Philippines, and Vietnam, were driven by expansions in planted area.

For **Brunei in 2024**, the increase in production was attributed to a rise in yield. The increase in yield was a result of farmers increasing fertilizer application and taking good care of their crops, and favorable weather.

For **Cambodia in 2024**, the increase in the production was attributed to a rise in planted area and yield. The increase in planted area was caused by the rising sugarcane prices and government policies. The increase in yield was a result of farmers' practices to take better care of their crops, use more available fertilizer, and improve sugarcane varieties.

For **Indonesia in 2024**, the increase in production was attributed to a rise in planted area and yield. The increase in planted area was caused by the rising sugarcane prices and government policies. The increase in yield was influenced by favorable weather conditions.

For **Lao PDR in 2024**, the decrease in production was due to the decrease in planted area. The decrease in planted area was affected by the rising prices of competing crops and government policies. Meanwhile, the yield was increased as farmers took better care of their crops and used more improved sugarcane varieties.

For **Myanmar in 2024**, the production was increased due to the increase in planted area and yield. The increase in planted area was due to the rising sugarcane prices. The yield was also increased as farmers used

more improved sugarcane varieties and more available fertilizer.

For **Thailand in 2024**, the decrease in production was attributed to planted area and yield. The decrease in planted areas was attributed to drought conditions and high production costs. Moreover, the decrease in yield was attributed to unsuitable weather conditions, specifically drought.

For **Vietnam in 2024**, the production was increased due to the increase in planted area. The increase in planted area was caused by the high demand from both domestic and external markets. The yield remained similar to the previous year.

► **Utilization and Stock**

The domestic utilization of sugar in ASEAN decreased by 0.36 million tons or 2.15 percent from 16.82 million tons in 2023 to 16.46 million tons in 2024 (Table 37-38). The beginning stock of sugar in ASEAN increased by 3.03 million tons or 27.04 percent from 11.21 million tons in 2023 to 14.25 million tons in 2024. The ending stock of sugar in ASEAN increased by 0.75 million tons or 5.27 percent from 14.25 million tons in 2023 to 15 million tons in 2024.

The ratio of sugar production to domestic utilization (self-sufficiency ratio) in 2024 decreased to 97.27 percent, compared to 108.40 percent in 2023. This indicates that ASEAN produced adequate sugar for regional consumption (Table 40, Figure 43). Moreover, on a country-by-country basis, sugar production in Cambodia, Lao PDR, Myanmar, Philippines, and Thailand exceeded the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (food security ratio) in 2024 was 86.56 percent, compared to 66.67 percent in 2023. This indicates that sugar availability in the region increased from the previous year (Table 41, Figure 44).

The 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.

Overall, although sugar production in ASEAN decreased, the beginning stock was sufficient to meet consumption within the ASEAN region. The reasons for this include higher consumption in the region due to economic recovery, which led to a rise in sugarcane prices due to government policy adjustments. When comparing to global trade of sugarcane, the sugar industry has continued to grow steadily, driven by the food industry, the tourism sector, and market expansion in countries such as India, Russia, and Pakistan (Sangsupan and Supharom, 2024).

► **Trade**

ASEAN's sugar exports increased in 2024 by 0.23 million tons, or 3.07 percent, from 7.54 million tons in 2023 to 7.77 million tons (Table 37-38, Figures 36-37). In terms of

imports, ASEAN as a whole imported approximately 8.97 million tons of sugar in 2024, a decrease from 9.41 million tons in 2023 (Table 37-38, Figures 39-40).

The quantity and value of sugar exports by destination countries and the quantity and value of sugar imports by origin countries are provided in Tables 42 and 43, respectively.

► **Prices**

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2023- 2024 are represented in Tables 44- 45. Thailand is the biggest of exporter in ASEAN countries. The average of Thailand FOB prices in 2024 of raw sugar was estimated by 521 US\$/tons (January-September), and white sugar was estimated by 636 US\$/tons (January-September).

► **Damaged Area**

No data has been recorded on the damaged areas across all ASEAN countries in 2024, and some damaged area data is still unavailable. The accurate data will be provided in the next report (Table 36).

Prospects for Sugar in 2025

► *Production*

Sugarcane production in ASEAN is forecasted to increase by 13.32 million tons or 8.04 percent from 165.57 million tons in 2024 to 178.89 million tons in 2025 (Table 32-35, Figure 32-35). The sugarcane production trends for 2025 in ASEAN countries depict a mixed scenario. In Cambodia, Indonesia, Myanmar, Philippines, and Thailand are expected to increase in sugarcane production. On the other hand, Lao PDR and Vietnam are expected to decrease in sugarcane production. Thailand is the largest sugarcane-producing country in the region which is forecasted to increase its production from 84.50 million tons in 2024 to 93.94 million tons in 2025.

For **Indonesia in 2025**, the production is expected to increase due to the increase in planted area as farmers respond to the rising sugarcane prices and government policies. The yield is also expected to increase due to favorable weather.

For **Lao PDR in 2025**, the production is expected to decrease due to the decrease in planted area and yield. The decrease in planted area is due to the rise of competing crops and government policies. The yield is expected to decrease as farmers may use less available fertilizer.

For **Vietnam in 2025**, the production is expected to decrease due to the decrease in planted area. The planted area is expected to decrease due to lower demand from both domestic and external markets, which may

lead farmers to reduce sugarcane cultivation. The yield is expected to remain similar to the previous year.

► *Utilization and Stock*

The domestic utilization of sugar in ASEAN is forecasted to increase from 16.46 million tons in 2024 to 16.99 million tons in 2025, reflecting an increase of 0.53 million tons, or 3.22 percent (Tables 38-39). The beginning stock in ASEAN is estimated at about 15 million tons of sugar in 2025, an increase of 0.75 million tons, or 5.27 percent, from 14.25 million tons in 2024. The ending stock of sugar in ASEAN is forecasted to reach 17.35 million tons in 2025, marking an increase of 2.35 million tons, or 15.69 percent, from around 15 million tons in 2024. The ratio of production to domestic utilization in 2025 is forecasted to be 101.90 percent, up from 97.27 percent in the previous year (Table 40, Figure 43). The ratio of the beginning stock to domestic utilization in 2025 is forecasted to be 88.28 percent, an increase from 86.56 percent in 2024 (Table 41, Figure 44).

► *Trade*

The export is predicted to decrease from 7.77 million tons in 2024 to 7.42 million tons in 2025 (Table 38-39, Figure 36-38). The import is expected to be 9.45 million tons in 2025, which increase from 8.97 million tons in 2024 (Tables 38-39, Figure 39-41)

Table 32 Sugarcane production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	173,538.08	165,568.00	-7,970.07	-4.59	178,885.05	13,317.04	8.04
Brunei	0.064	0.067	0.003	5.000	0.070	0.003	5.000
Cambodia	1,840.33	2,039.64	199.31	10.83	*2,260.53	220.89	10.83
Indonesia	32,045.35	33,119.65	1,074.30	3.35	35,564.19	2,444.54	7.38
Lao PDR	1,653.98	1,639.00	-14.98	-0.91	1,600.00	-39.00	-2.38
Malaysia	N/A						
Myanmar	10,880.60	*11,592.61	712.01	6.54	*12,351.21	758.60	6.54
Philippines	19,434.11	*20,564.71	1,130.60	5.82	*21,761.09	1,196.38	5.82
Singapore	N/A						
Thailand	96,139.88	84,494.75	-11,645.13	-12.11	93,944.00	9,449.24	11.18
Vietnam	11,543.76	12,117.57	573.81	4.97	11,403.97	-713.61	-5.89

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, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	2,942.00	2,876.03	-65.97	-2.24	2,972.70	96.67	3.36
Brunei	N/A						
Cambodia	43.38	45.25	1.88	4.33	*47.21	1.96	4.33
Indonesia	504.78	515.33	10.55	2.09	526.45	11.12	2.16
Lao PDR	34.11	33.30	-0.81	-2.37	32.87	-0.43	-1.29
Malaysia	N/A						
Myanmar	165.28	170.27	4.99	3.02	*175.42	5.14	3.02
Philippines	*340.49	*399.21	58.73	17.25	*419.17	19.96	5.00
Singapore	N/A						
Thailand	1,679.16	1,529.15	-150.00	-8.93	1,598.88	69.72	4.56
Vietnam	174.82	183.51	8.69	4.97	172.70	-10.81	-5.89

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, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	2,941.90	2,875.92	-65.97	-2.24	2,972.59	96.67	3.36
Brunei	N/A						
Cambodia	43.27	45.15	1.88	4.34	*47.10	1.96	4.34
Indonesia	504.78	515.33	10.55	2.09	526.45	11.12	2.16
Lao PDR	34.11	33.30	-0.81	-2.37	32.87	-0.43	-1.29
Malaysia	N/A						
Myanmar	165.28	170.27	4.99	3.02	*175.42	5.14	3.02
Philippines	340.49	*399.21	58.73	17.25	*419.17	19.96	5.00
Singapore	N/A						
Thailand	1,679.16	1,529.15	-150.00	-8.93	1,598.88	69.72	4.56
Vietnam	*174.82	*183.51	8.69	4.97	*172.70	-10.81	-5.89

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

Table 35 Sugarcane yield in ASEAN countries, 2023 – 2025

Unit: Ton/Hectare

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	58.99	57.57	-1.42	-2.41	60.18	2.61	4.53
Brunei	N/A						
Cambodia	42.53	45.18	2.65	6.23	47.99	2.81	6.22
Indonesia	63.48	64.27	0.79	1.24	67.56	3.29	5.12
Lao PDR	48.49	49.21	0.72	1.48	48.67	-0.54	-1.10
Malaysia	N/A						
Myanmar	65.83	68.08	2.25	3.42	70.41	2.33	3.42
Philippines	57.08	51.51	-5.57	-9.76	51.91	0.40	0.78
Singapore	N/A						
Thailand	57.25	55.26	-1.99	-3.48	58.76	3.50	6.33
Vietnam	66.03	66.03	0.00	0.00	66.03	0.00	0.00

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, 2024**

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecified	Total
ASEAN	-	-	-	-	-	-	-
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
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, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	11,214,174	17,985,608	9,410,004	38,609,786	16,821,333	7,541,691	14,246,762	38,609,786
Brunei	3,552	64	3,165	6,781	5,130	-	1,651	6,781
Cambodia	-	184,033	-	184,033	*56,481	127,552	-	184,033
Indonesia	1,110,517	2,271,009	5,069,455	8,450,981	7,128,890	181,875	1,140,216	8,450,981
Lao PDR	79,969	330,796	176,634	587,399	207,336	184,263	195,800	587,399
Malaysia	-	-	1,950,312	1,950,312	*1,734,273	*216,039	-	1,950,312
Myanmar	686,089	869,795	74,000	1,629,884	1,345,277	69,000	215,607	1,629,884
Philippines	344,021	1,862,562	639,000	2,845,583	1,644,910	-	1,200,673	2,845,583
Singapore	-	-	248,820	248,820	182,736	66,084	-	248,820
Thailand	8,700,000	11,312,973	287,978	20,300,951	2,572,300	6,541,356	11,187,295	20,300,951
Vietnam	290,026	1,154,376	960,640	2,405,042	1,944,000	155,522	305,520	2,405,042

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, 2024**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	14,246,762	16,009,605	8,973,691	39,230,058	16,459,047	7,772,974	14,998,037	39,230,058
Brunei	1,651	68	5,383	7,102	5,294	-	1,808	7,102
Cambodia	-	203,964	-	203,964	*130,696	73,268	-	203,964
Indonesia	1,140,216	2,410,991	4,768,194	8,319,401	6,766,601	245,441	1,307,359	8,319,401
Lao PDR	195,800	327,800	312,864	836,464	268,968	379,281	188,215	836,464
Malaysia	-	-	*2,108,464	2,108,464	*1,895,196	*213,268	-	2,108,464
Myanmar	215,607	926,713	78,000	1,220,320	*727,760	115,000	377,560	1,220,320
Philippines	1,200,673	*1,900,000	*242,000	3,342,673	1,898,814	24,179	1,419,680	3,342,673
Singapore	-	-	204,880	204,880	204,038	843	-	204,880
Thailand	11,187,295	9,028,312	219,420	20,435,027	2,578,800	*6,500,000	11,356,227	20,435,027
Vietnam	305,520	1,211,757	1,034,486	2,551,763	1,982,880	221,695	347,188	2,551,763

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, 2025**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	14,998,037	17,311,401	9,448,124	41,757,562	16,988,392	7,418,200	17,350,970	41,757,562
Brunei	1,808	72.00	5,041	6,921	5,273	-	1,648	6,921
Cambodia	-	*226,053	-	226,053	*136,666	89,387	-	226,053
Indonesia	1,307,359	2,589,073	5,281,751	9,178,183	6,963,493	277,129	1,937,561	9,178,183
Lao PDR	188,215	320,000	-	508,215	262,371	-	245,844	508,215
Malaysia	-	-	*2,279,440	2,279,440	*2,068,907	*210,533	-	2,279,440
Myanmar	377,560	*987,355	*80,000	1,444,915	*750,457	*120,000	574,458	1,444,915
Philippines	1,419,680	*2,010,535	*250,000	3,680,215	*2,000,000	*25,000	1,655,215	3,680,215
Singapore	-	-	226,850	226,850	193,387	33,463	-	226,850
Thailand	11,356,227	10,037,916	*250,000	21,644,143	*2,585,300	*6,500,000	12,558,843	21,644,143
Vietnam	347,188	1,140,397	1,075,042	2,562,627	2,022,538	162,688	377,401	2,562,627

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), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	18,234,428	16,821,333	108.40	16,009,605	16,459,047	97.27	17,311,401	16,988,392	101.90
Brunei	64	5,130	1.25	68	5,294	1.28	72	5,273	1.37
Cambodia	184,033	56,481	325.83	203,964	130,696	156.06	226,053	136,666	165.41
Indonesia	2,271,009	7,128,890	31.86	2,410,991	6,766,601	35.63	2,589,073	6,963,493	37.18
Lao PDR	330,796	207,336	159.55	327,800	268,968	121.87	320,000	262,371	121.96
Malaysia	-	1,734,273	-	-	1,895,196	-	-	2,068,907	-
Myanmar	869,795	1,345,277	64.66	926,713	727,760	127.34	987,355	750,457	131.57
Philippines	1,862,562	1,644,910	113.23	1,900,000	1,898,814	100.06	2,010,535	2,000,000	100.53
Singapore	248,820	182,736	136.16	-	204,038	-	-	193,387	-
Thailand	11,312,973	2,572,300	440	9,028,312	2,578,800	350	10,037,916	2,585,300	388
Vietnam	1,154,376	1,944,000	59.38	1,211,757	1,982,880	61.11	1,140,397	2,022,538	56.38

Remark: * The value is estimated by AFSIS Secretariat.**Table 41 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio), 2023 – 2025**

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	11,214,174	16,821,333	66.67	14,246,762	16,459,047	86.56	14,998,037	16,988,392	88.28
Brunei	3,552	5,130	69.24	1,651	5,294	31.19	1,808	5,273	34.29
Cambodia	-	56,481	-	-	130,696	-	-	136,666	-
Indonesia	1,110,517	7,128,890	15.58	1,140,216	6,766,601	16.85	1,307,359	6,963,493	18.77
Lao PDR	79,969	207,336	38.57	195,800	268,968	72.80	188,215	262,371	71.74
Malaysia	-	1,734,273	-	-	1,895,196	-	-	2,068,907	-
Myanmar	686,089	1,345,277	51.00	215,607	727,760	29.63	377,560	750,457	50.31
Philippines	344,021	1,644,910	20.91	1,200,673	1,898,814	63.23	1,419,680	2,000,000	70.98
Singapore	-	182,736	-	-	204,038	-	0	193,387	-
Thailand	8,700,000	2,572,300	338	11,187,295	2,578,800	434	11,356,227	2,585,300	439
Vietnam	290,026	1,944,000	14.92	305,520	1,982,880	15.41	347,188	2,022,538	17.17

Remark: * The value is estimated by AFSIS Secretariat.

Table 42 Quantity and Value of Sugar Export by Countries of Destination in 2024

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	30	39,281	3,000	1,612,275					4,834	3,103,899			18,404	10,588,274
Lao PDR														
Malaysia	4.57	3,323	1.65	1,978	21,202	16,256,229					7,100	5,018,403	6,974	5,043,157
Myanmar	N/A													
Philippines														
Singapore	5	3,323	2	1,978	21,202	16,256,229					7,100	5,018,403	6,974	5,043,157
Thailand	3,390	2,502,403	639,684	390,440,379	884,020	466,000,587	289,769	186,938,941	188,609	115,325,400	68,781	53,790,873	217,649	110,501,507
Vietnam	-	24,716	-	10,656,044	-	32,570,292	-	1,093,358	-	6,586,389	-	1,505	-	48,482,344

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	5,503.56	3,389,383	20,878	12,886,654	60,800	44,407,694	113,449	76,027,460	40,221	27,582,109	153,670	103,609,569
Lao PDR					261,924	143,770,088	261,924	143,770,088	261,924	143,770,088	523,848	287,540,177
Malaysia	23,792	17,134,986	9,333	6,135,364	5,740	4,193,539	74,148	53,786,979	68,031	48,900,200	142,179	102,687,179
Myanmar									13,485	540,000	13,485	540,000
Philippines							-	-	24,179	15,151,669	24,179	15,151,669
Singapore	23,792	17,134,986	9,333	6,135,364	5,740	4,193,539	74,148	53,786,979	68,031	48,900,200	142,179	102,687,179
Thailand	94,646	64,615,063			215,709	116,503,373	2,602,258	1,506,618,527	2,870,614	1,564,573,830	5,472,872	3,071,192,357
Vietnam	-	2,056,124	-	26,215,733			-	127,686,504		204,791,482	-	332,477,986

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 2024

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									27,003	19,403,827				
Lao PDR														
Malaysia					3,774	2,765,206							15.50	15,768
Myanmar														
Philippines					18,400	11,409,834			16,424	9,999,291				
Singapore					6,400	4,349,332			34,872	24,267,238	35	6,891	2.04	16,399.73
Thailand			79.59	211,605	68,877	48,722,091	28,589	5,241,178	13,624	11,767,459	622	264,973	757	3,498,762
Vietnam			-	49,503,595	-	64,217,319	-	45,555,723	-	12,638,750	-	57,023,308	-	12,023,809

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	20.88	610	922,100	553,432,216	33,500	22,445,751	982,624	595,282,404	2,680,686	1,549,896,066	3,663,310	2,145,178,470
Lao PDR			286,889	137,601,781			286,889	137,601,781	25,975	12,958,865	312,864	150,560,646
Malaysia	20.18	29,017	252,448	172,180,248	20.52	18,438	256,278	175,008,677	1,149,365	716,611,865	1,405,643	891,620,543
Myanmar							-	-			-	-
Philippines			138,077	90,536,144	28,750	18,041,250	201,652	129,986,519	-	-	201,652	129,986,519
Singapore			120,178	85,527,198	1,585	1,265,186	163,072	115,432,243	41,808	31,948,118	204,880	147,380,361
Thailand	795	2,520,722			88,375	31,417,503	201,719	103,644,292	556,560	354,871,578	758,279	458,515,870
Vietnam	-	18,070,612	-	159,492,401			-	418,525,516	-	328,129,139	-	746,654,656

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
Indonesia	HS code 17011400	2023	1023	921	1368	33501	739	1343	1017	1099	762	990	1024	1070	3,738
		2024	2,454	2,300	2,264	2,949	3,519	1,955	959	1,325	1,566				2,144
Lao PDR	White Sugar	2023	250	250	250	470	572	597	550	546	570	591	587	573	484
		2024	584	566	542	589	563	525	539	589	555	564			562
Malaysia	Not specified	2023	608	585	631	640	613	659	678	702	716	693	704	730	663
		2024	708	697	695	724	651	610	642	653					672
Myanmar	Not specified	2023	48	47	47	79							63	40	54
		2024	40	40	40										40
Philippines	Muscovado Exports	2023	1,976	2,034	1,738	1,852	1,906	1,818	1,997	2,077	2,059	2,052	2,015	2,045	1,964
		2024	1,799	1,931	2,195	1,903	2,010	2,004	2,268	2,286	2,212	2,148			2,076
	Molasses Imports	2023	188	180	178	198	173	195	202	182	186	182	185	192	187
		2024	187	182	219	207	246	214	223	223	204	202			211
Thailand	Raw Sugar	2023	488	456	451	457	454	462	495	461	472	476	511	591	481
		2024	508	528	550	524	551	503	513	486	525				521
	White Sugar	2023	583	540	550	573	603	600	533	630	641	654	710	703	610
		2024	659	673	669	634	633	621	608	621	609				636

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	HS code 17011400	2023	500	503	512	535	555	578	572	600	559	601	613	648	565
		2024	610	613	612	599	577	578	550	522	518				576
Lao PDR	White Sugar	2023	442	446	440	496	494	497	499	500	496	453	461	454	473
		2024	499	499	490	452	476	499	490	490	480	464			484
Malaysia	Not specified	2023	555	514	573	542	649	632	694	602	641	650	690	712	621
		2024	624	616	599	650	576	540	596	569					596
Singapore	Not specified	2023	596	610	626	620	681	708	725	723	729	763	762	307	654
		2024	771	762	762	750	745	722	710	700	650	650	650	650	710

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

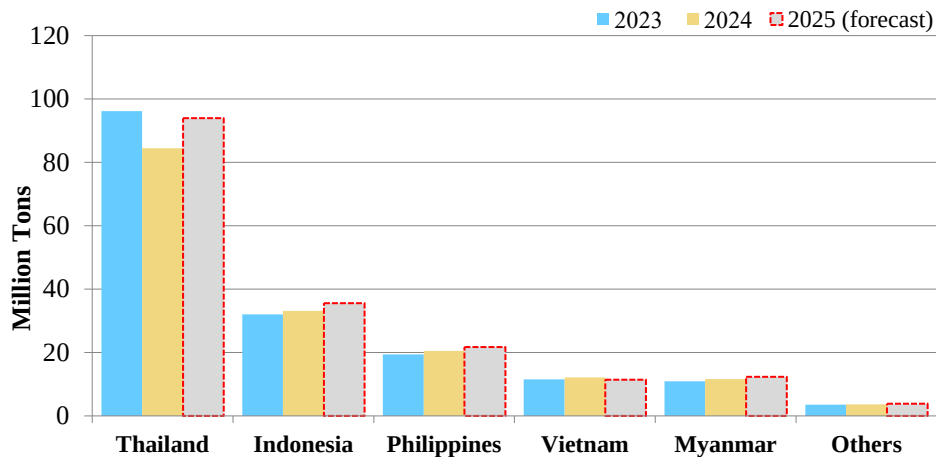


Figure 32 Sugarcane production of selected countries in ASEAN, 2023 – 2025

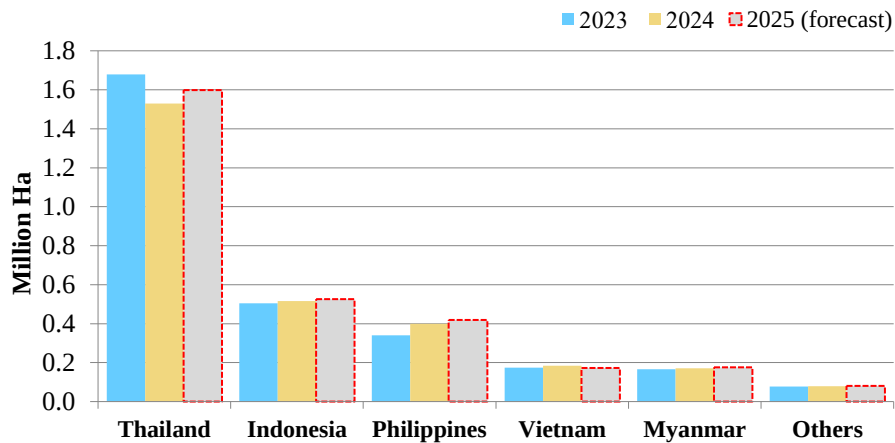


Figure 33 Sugarcane planted area of selected countries in ASEAN, 2023 – 2025

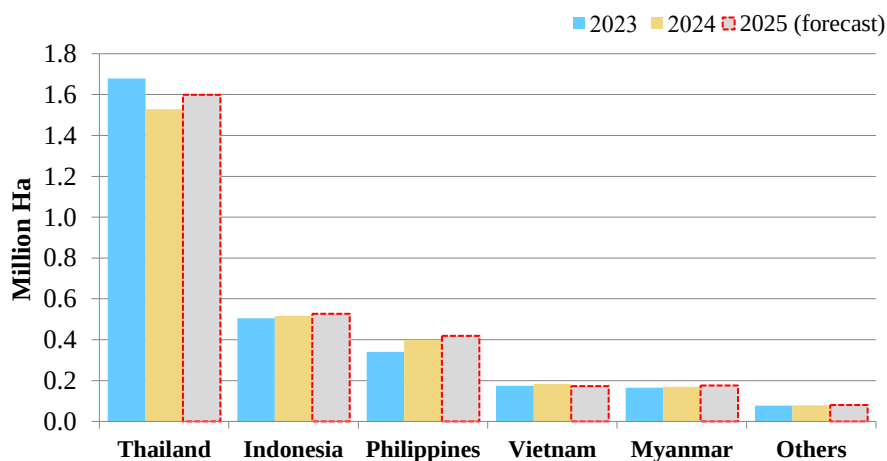


Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2023 – 2025

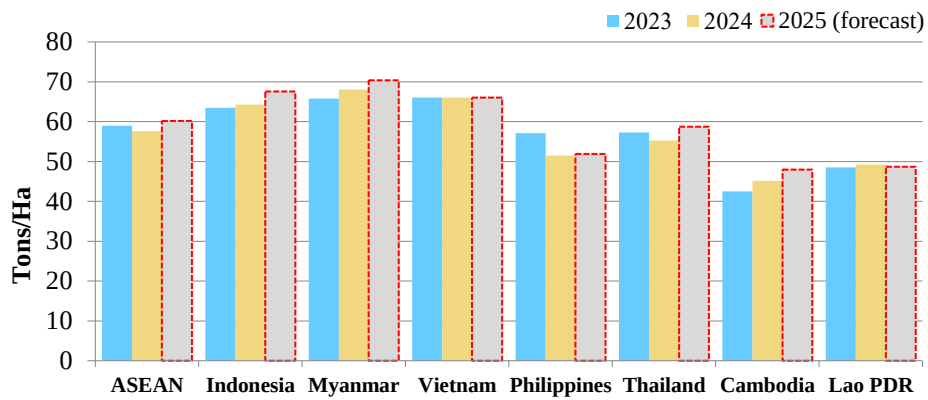


Figure 35 Sugarcane yield of selected countries in ASEAN, 2023 – 2025

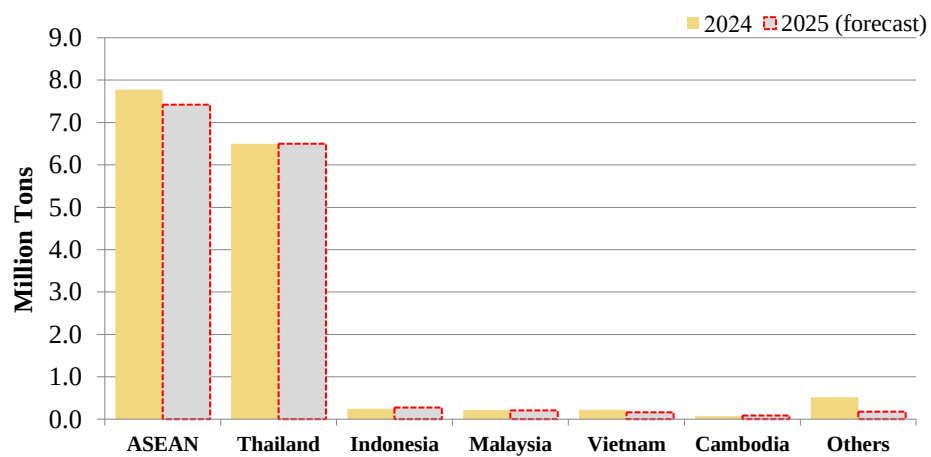
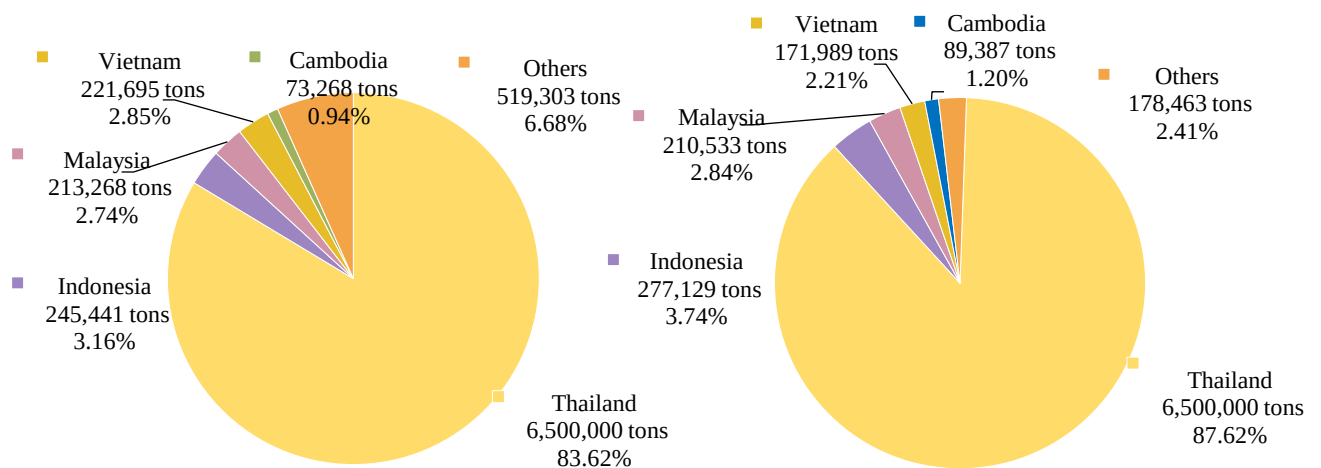


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 7.77 Million Tons

Figure 37 Share of sugar export (tons) among ASEAN countries, 2024

Total 7.42 Million Tons

Figure 38 Share of sugar export (tons) among ASEAN countries, 2025

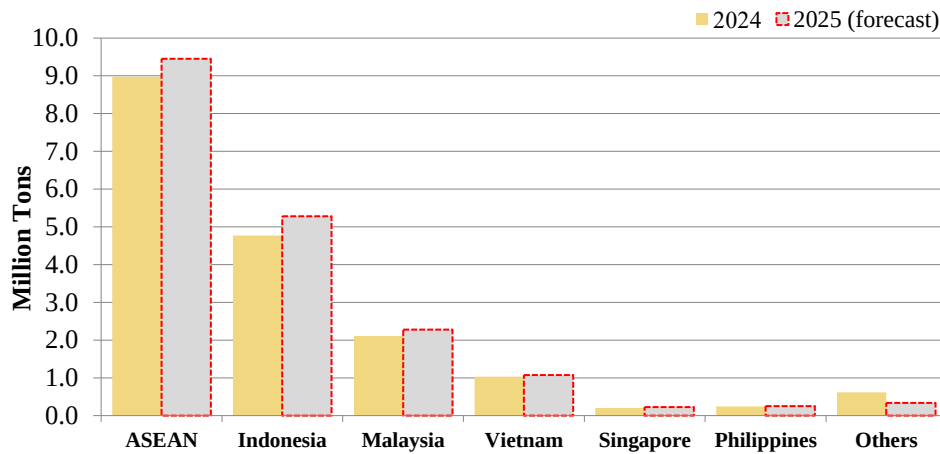
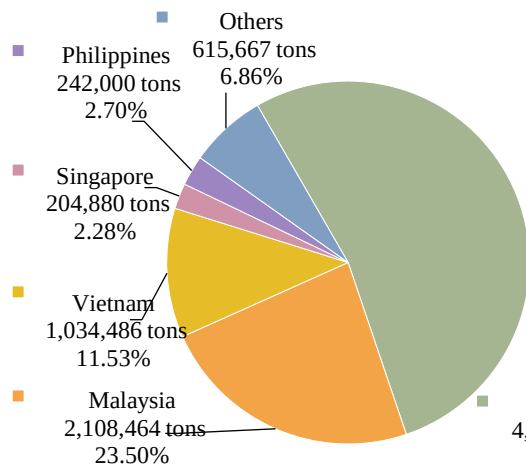
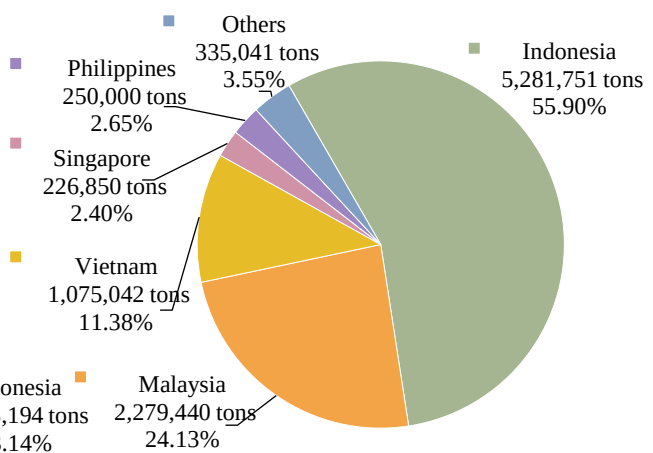


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 8.97 Million Tons

Figure 40 Share of sugar import (tons) among ASEAN countries, 2024



Total 9.45 Million Tons

Figure 41 Share of sugar import (tons) among ASEAN countries, 2025

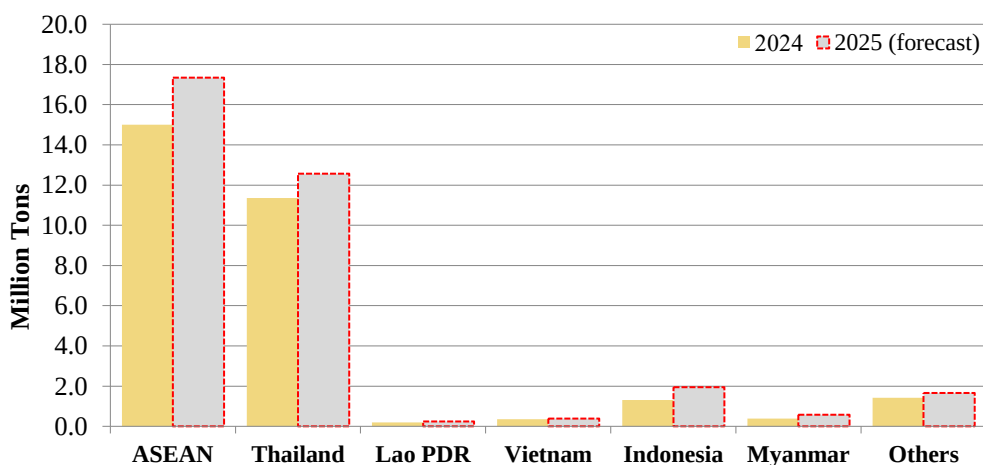


Figure 42 Amount of ending stock of Sugar in ASEAN countries in 2024 – 2025

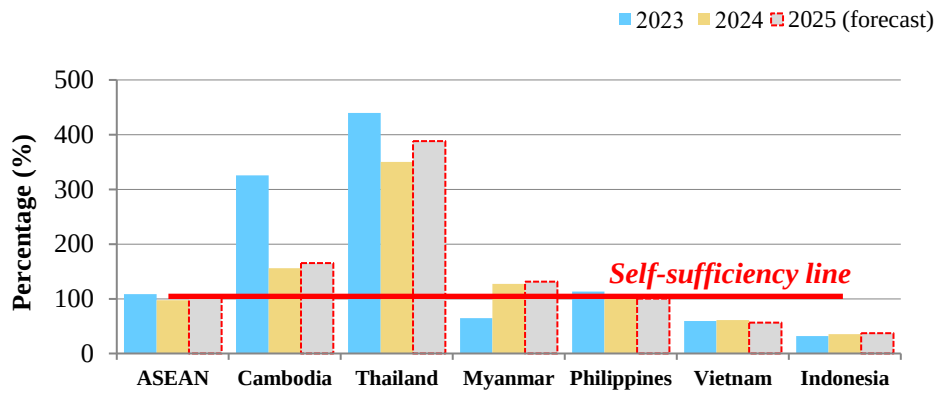


Figure 43 Ratio of sugar production to domestic utilization in ASEAN countries, 2023 – 2025

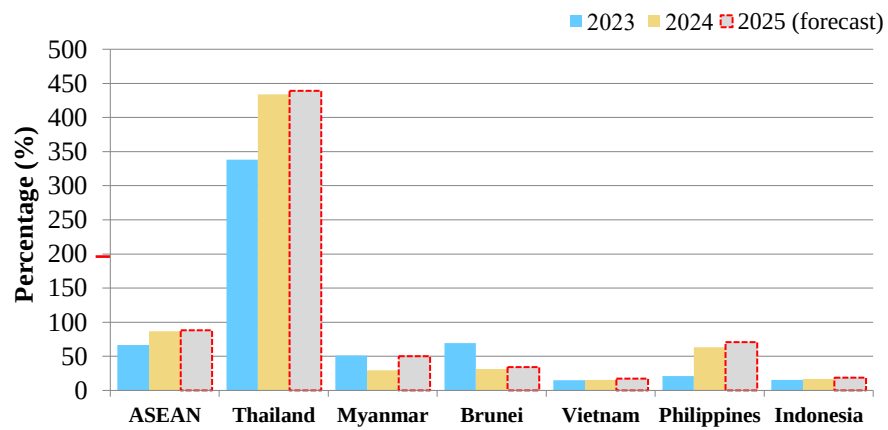


Figure 44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

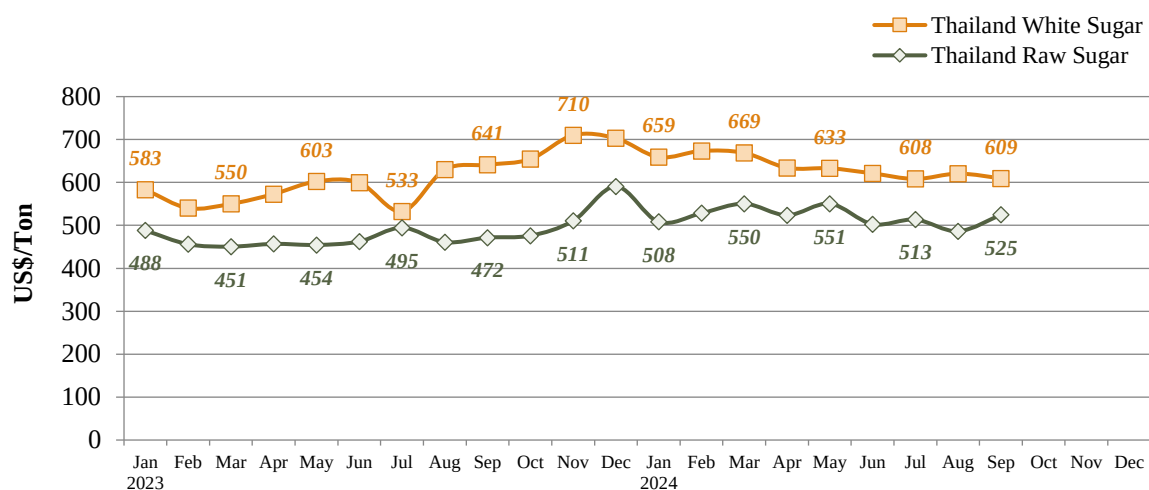


Figure 45 FOB price (US\$/Ton) of white sugar and raw sugar in Thailand in 2023 – 2024

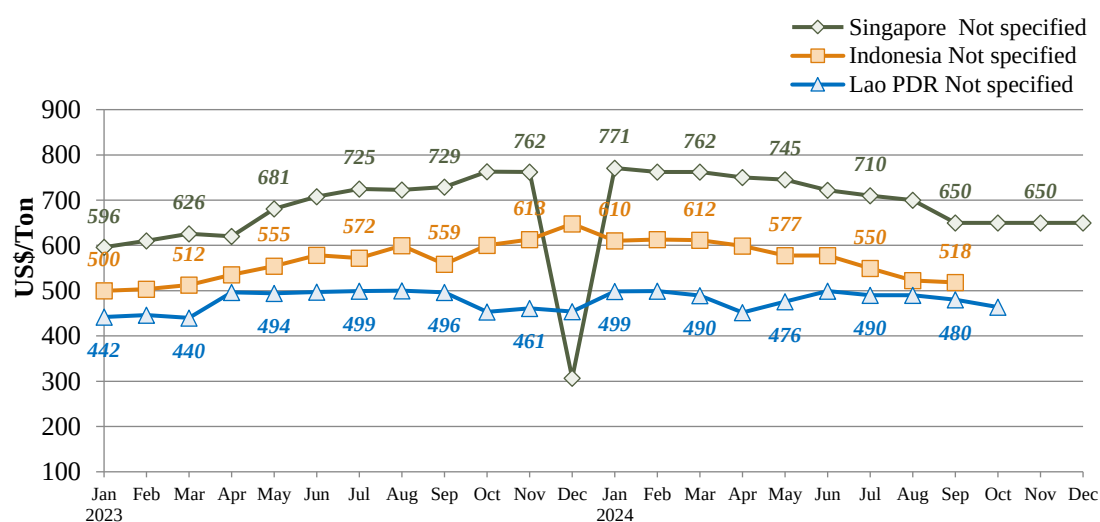


Figure 46 CIF price (US\$/Ton) of sugar of selected countries in ASEAN in 2023 – 2024

Soybean Outlook for 2025



Highlights

The forecast for the supply of soybeans in ASEAN indicates an increase from 9.88 million tons in 2024 to 10.29 million tons in 2025, reflecting an increase of 0.41 million tons, or 4.15 percent (Table 46). This growth in the soybean supply is driven by increases in both beginning stock and imports. The beginning stock is estimated at 0.42 million tons in 2025, greatly increasing of 0.15 million tons, or 55.56 percent, from 0.27 million tons in 2024. Soybean production for 2025 is forecasted at 0.67 million tons, reflecting a slight decrease from the previous year's production of 0.68 million tons. Soybean imports are forecasted to increase by 0.27 million tons, or 3.02 percent, from 8.93 million tons in 2024 to 9.20 million tons in 2025.

The increase in soybean demand is primarily attributed to higher domestic utilization and the ending stock. Domestic utilization is forecasted to increase by 0.20 million tons, or 2.14 percent, from 9.35 million tons in 2024 to 9.55 million tons in 2025. Exports are forecasted to decrease by 0.02 million tons, or 18.20 percent, from 0.11 million tons in 2024 to 0.09 million tons in 2025. The ending stock is forecasted to significantly increase by 0.23 million tons, or 54.76 percent, from 0.42 million tons in 2024 to 0.65 million tons in 2025.

The production-to-domestic utilization ratio (self-sufficiency ratio) in 2025 is forecasted to be 7.02 percent, a decrease from 7.31 percent in 2024. The beginning stock-to-domestic utilization ratio (food security ratio) is predicted to be 4.43 percent in 2025, an increase from 2.91 percent in the previous year.

Table 46 Summary of the ASEAN soybean situation, 2024 – 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	9.88	10.29	0.41	4.15
Beginning stock	0.27	0.42	0.15	55.56
Production	0.68	0.67	-0.01	-1.47
Import	8.93	9.20	0.27	3.02
Demand (Million tons)	9.88	10.29	0.41	4.15
Domestic utilization	9.35	9.55	0.20	2.14
Export	0.11	0.09	-0.02	-18.20
Ending stock	0.42	0.65	0.23	54.76
Ratio of production to domestic utilization (%)	7.31	7.02	-0.29	-
Ratio of beginning stock to domestic utilization (%)	2.91	4.43	1.52	-

ASEAN Soybean Situation 2024

► **Production**

The soybean production in ASEAN in 2024 (crop year 2023/24) was 0.68 million tons, an increase of 0.16 million tons from 0.52 million tons in 2023 (crop year 2022/23). The increase in production was observed in Indonesia, Lao PDR, Myanmar, and Vietnam. Additionally, Indonesia was the largest soybean-producing country, with production rising by 0.14 million tons, or 65.05 percent, from 0.22 million tons in 2023 to 0.36 million tons in 2024, despite a decline in soybean production in Cambodia, Philippines, and Thailand (Tables 47-50, Figures 47-50).

For **Cambodia in 2024**, the decrease in production was attributed to the decrease in planted area and yield. The decreased in planted area was due to unfavorable weather and government policies. Additionally, the decrease in yield was affected by pests' infestation and diseases, as well as reduced fertilizer application.

For **Indonesia in 2024**, the increase in production was attributed to the increase in planted area and yield. The increase in planted area was due to by favorable weather and government policies. Additionally, the increase in yield was due to farmers' practices to take better care of their crops, and use more improved soybean varieties.

For **Lao PDR in 2024**, the increase in the production was attributed to the increase in planted area. The increase in planted area was due to favorable weather and government policies. Meanwhile, the decrease in yield was affected by farmers using less fertilizer, which was mostly affected in the dry season.

For **Myanmar in 2024**, the increase in production was attributed to the increase in planted area and yield. The increase in planted area was due to the rising soybean prices. Additionally, the increase

in yield was caused by favorable weather, and farmers' practice to take better care of their crops, despite some areas being affected by flooding.

For the **Philippines in 2024**, the decrease in production was attributed to the decrease in planted area. Meanwhile, the increase in yield was caused by favorable weather, and farmers' practices to use more available fertilizer combined with insecticides.

For **Thailand in 2024**, the decrease in production was attributed to the decrease in planted area and yield. The decreased in planted area was due to a lack of the amount of soybean seed, declining soybean prices, a shortage of harvesting labor, and high costs of production. As a result, some farmers switched to planting more valuable crops, such as rice, maize, sugarcane, sweet corn, and green beans. Additionally, the yield was also slightly decreased due to the drought during the dry season.

For **Vietnam in 2024**, the increase in production was attributed to the increase in yield. The yield was increased due to favorable weather and farmers using more available fertilizer.

► **Utilization and Stock**

The domestic utilization of soybeans in ASEAN increased to 9.35 million tons in 2024, up from 8.81 million tons in 2023 (Tables 52-53). The beginning stock of soybeans in ASEAN for 2024 was estimated at 0.27 million tons, a decrease from 0.33 million tons in 2023. The ending stock of soybeans in ASEAN for 2024 was estimated at 0.42 million tons, compared to 0.27 million tons in 2023.

The ratio of production to domestic utilization (self-sufficiency ratio) in ASEAN for 2024 was 7.31 percent, reflecting an increase from approximately 5.89 percent in 2023 (Table 55, Figure 58). Additionally,

the food security ratio, representing the ratio of beginning stock to domestic utilization in ASEAN for 2024, was estimated at 2.91 percent, showing a decrease from 3.71 percent in 2023 (Table 56, Figure 59).

In summary, soybean production in ASEAN increased and the overall production volume remains insufficient to meet consumption demands within the region. ASEAN's soybean production in 2024 increased by 0.16 million tons from 0.52 million tons in 2023 to 0.68 million tons in 2024, with significant production growth in Indonesia, Lao PDR, Myanmar, and Vietnam, particularly driven by Indonesia's 65.05 percent rise. Moreover, the ASEAN's domestic utilization of soybeans grew surpassing soybean production. The self-sufficiency ratio improved slightly to 7.31 percent in 2024, indicating a modest increase in local production compared to demand. However, the food security ratio decreased to 2.91 percent in 2024, suggesting that ASEAN still relies on imports to meet its soybean consumption needs.

► *Trade*

In 2024, ASEAN exported a total of 111,326 tons of soybeans, an increase of 33,330 tons from 77,996 tons in 2023. Additionally, ASEAN countries imported 8.93 million tons of soybeans in 2024, an increase of 0.61 million tons from 8.32 million tons in 2023 (Tables 52-53, Figures 51-52). The quantity and value of soybean exports by destination countries, as well as the quantity and value of soybean imports by origin countries, are provided in Tables 57-58.

► *Prices*

The monthly FOB prices of soybeans for exporting countries during 2023-2024 are presented in Table 59, and also the monthly CIF prices for importing countries are presented in Table 60 (Table 59, Figure 60).

► *Damaged Area*

The total damaged area of soybeans in ASEAN in 2024 was estimated at 88 hectares. The major causes of damage were drought, which affected 50 hectares in Thailand, and damage of flood impacted in Myanmar of 38 hectares (Table 51).

Prospects for Soybean in 2025

► *Production*

The forecast for soybean production in ASEAN in 2025 indicates a decrease of 0.013 million tons, or 1.86 percent, from 0.68 million tons in 2024 to 0.67 million tons in 2025 (Table 47, Figure 47). Overall, production is expected to decline in Cambodia, Indonesia, Lao PDR, Philippines, Thailand, and Vietnam. However, only production in Myanmar is expected to increase.

For **Indonesia in 2025**, the production is expected to decrease due to the decrease in planted area. The planted area is expected to decrease due to the declining soybean prices and the rising prices of competing crops. Meanwhile, the yield is expected to increase due to favorable weather, farmers' practices to take better care of their crops, and use improved soybean varieties.

For **Lao PDR in 2025**, the production is expected to decrease due to the decrease in planted area. The planted area is expected to decrease due to the rising prices of competing crops and government policies. Meanwhile, the yield is expected to increase as farmers may improve soybean varieties, and take better care of crops.

For **Vietnam in 2025**, the production is expected to decrease due to the decrease in planted area. The planted area is expected to decrease due to the rising prices of competing crops. Meanwhile, the yield is expected to remain similar to the previous year.

► *Utilization and Stock*

The domestic utilization of soybeans in ASEAN is forecasted to increase by 0.06 million tons, or 0.63 percent, from 9.49 million tons in 2024 to 9.55 million tons in 2025 (Tables 53-54).

The beginning stock in ASEAN in 2025 is forecasted to significantly increase by 0.15 million tons, or about 57.32 percent, from 0.27 million tons in 2024 to 0.42 million tons in 2025 (Tables 53-54). The ending stock in ASEAN in 2025 is forecasted to greatly increase by 0.23 million tons, or about 54.80 percent, from 0.42 million tons in 2024 to 0.65 million tons in 2025 (Tables 53-54, Figure 57).

The ratio of production to domestic utilization (self-sufficiency ratio) is forecasted to be 7.02 percent, a decrease from 7.31 percent in 2024 (Table 55, Figure 58). The ratio of beginning stock to domestic utilization (food security ratio) is forecasted to be 4.43 percent in 2025, an increase from 2.91 percent in 2024 (Table 56, Figure 59).

► *Trade*

The export of soybeans is forecasted to increase by 5,306 tons, or about 6.18 percent, from 85,824 tons in 2024 to 91,130 tons in 2025. The import of soybeans is forecasted to increase by 0.14 million tons, or about 1.55 percent, from 9.06 million tons in 2024 to 9.20 million tons in 2025 (Tables 53 and 54, Figures 51, 53, 54, and 56).

Table 47 Soybean production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	519.15	683.19	164.04	31.60	670.51	-12.67	-1.86
Brunei	N/A						
Cambodia	21.71	20.62	-1.08	-5.00	*19.59	-1.03	-5.00
Indonesia	220.12	363.31	143.18	65.05	347.45	-15.86	-4.36
Lao PDR	10.29	20.80	10.51	102.14	16.00	-4.80	-23.08
Malaysia	N/A						
Myanmar	198.93	210.27	11.35	5.70	*222.28	12.01	5.71
Philippines	0.61	*0.60	-0.01	-2.14	*0.46	-0.14	-24.07
Singapore	N/A						
Thailand	19.15	18.87	-0.28	-1.48	*18.57	-0.30	-1.57
Vietnam	48.34	48.72	0.38	0.79	46.17	-2.55	-5.24

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, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	330.37	398.38	68.01	20.59	385.71	-12.67	-3.18
Brunei	N/A						
Cambodia	12.71	*11.31	-1.40	-11.00	*10.07	-1.24	-11.00
Indonesia	139.01	196.60	57.59	41.42	182.71	-13.88	-7.06
Lao PDR	4.01	8.99	4.98	124.19	6.00	-2.99	-33.26
Malaysia	N/A						
Myanmar	132.25	139.33	7.08	5.35	*146.79	7.46	5.35
Philippines	*0.44	*0.33	-0.10	-23.76	*0.25	-0.08	-23.62
Singapore	N/A						
Thailand	11.88	11.75	-0.13	-1.08	*11.39	-0.36	-3.05
Vietnam	30.08	30.08	0.00	0.00	28.50	-1.58	-5.24

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, 2023 – 2025

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	329.67	397.39	67.72	20.54	385.10	-12.29	-3.09
Brunei	N/A						
Cambodia	12.64	*10.41	-2.23	-17.64	*9.57	-0.83	-8.00
Indonesia	138.53	196.60	58.07	41.92	182.71	-13.88	-7.06
Lao PDR	4.01	8.99	4.98	124.19	6.00	-2.99	-33.26
Malaysia	N/A						
Myanmar	132.25	*139.29	7.04	5.32	*146.71	7.42	5.33
Philippines	0.44	0.33	-0.10	-23.76	0.25	-0.08	-23.62
Singapore	N/A						
Thailand	11.85	11.70	-0.15	-1.27	*11.35	-0.35	-2.95
Vietnam	29.96	30.08	0.11	0.38	28.50	-1.58	-5.24

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

Table 50 Soybean yield in ASEAN countries, 2023 – 2025

Unit: Tons/Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	1.57	1.72	0.14	9.17	1.74	0.02	1.28
Brunei	N/A						
Cambodia	1.72	*1.98	0.26	15.35	*2.05	0.06	3.26
Indonesia	1.59	1.85	0.26	16.29	1.90	0.05	2.90
Lao PDR	2.57	2.31	-0.25	-9.84	2.67	0.35	15.26
Malaysia	N/A						
Myanmar	1.50	*1.51	0.01	0.36	*1.52	0.01	0.36
Philippines	1.40	1.80	0.40	28.35	1.79	-0.01	-0.59
Singapore	N/A						
Thailand	1.62	1.61	0.00	-0.21	*1.64	0.02	1.42
Vietnam	1.61	1.62	0.01	0.81	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, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						Total
	Flood	Drought	Pests	Diseases	Other	Unspecified	
ASEAN	38	50	-	-	-	-	88
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	38	-	-	-	-	-	38
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	50	-	-	-	-	50
Vietnam	-	-	-	-	-	-	-

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

Table 52 Soybean balance sheet of ASEAN countries, 2023

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	326,742	519,151	8,318,901	9,164,795	8,814,958	77,996	271,841	9,164,795
Brunei	-	-	588	588	588	-	-	588
Cambodia	-	21,706	50,446	72,152	18,076	54,076	-	72,152
Indonesia	162,000	220,124	2,274,428	2,656,552	2,532,612	2,561	121,379	2,656,552
Lao PDR	112	10,290	726	11,128	5,775	-	5,353	11,128
Malaysia	*64,000	-	640,741	704,741	*629,853	*9,888	65,000	704,741
Myanmar	6,106	198,928	1,308	206,342	199,706	166	6,470	206,342
Philippines	11,000	614	185,000	196,614	190,000	-	6,614	196,614
Singapore	-	-	21,695	21,695	21,413	282	-	21,695
Thailand	-	19,150	3,284,969	3,304,119	*3,303,820	299	-	3,304,119
Vietnam	83,524	48,340	1,859,000	1,990,864	1,913,115	10,724	67,025	1,990,864

Remark: * The value is estimated by AFSIS Secretariat.

Table 53 Soybean balance sheet of ASEAN countries, 2024

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	271,841	683,190	8,926,376	9,881,407	9,347,133	111,326	422,948	9,881,407
Brunei	-	-	728	728	728	-	-	728
Cambodia	-	20,621	51,087	71,708	16,858	54,850	-	71,708
Indonesia	121,379	363,306	2,298,538	2,783,223	2,569,146	5,354	208,723	2,783,223
Lao PDR	5,353	20,800	13,814	39,967	5,545	33,693	729	39,967
Malaysia	*65,000	-	*725,000	790,000	*710,000	*10,000	70,000	790,000
Myanmar	6,470	210,274	835	217,579	198,536	220	18,823	217,579
Philippines	6,614	601	190,000	197,215	*182,000	-	15,215	197,215
Singapore	-	-	21,093	21,093	20,250	843	0	21,093
Thailand	-	18,866	3,400,000	3,418,866	*3,418,566	300	-	3,418,866
Vietnam	67,025	48,722	2,225,281	2,341,028	2,225,504	6,066	109,458	2,341,028

Remark: * The value is estimated by AFSIS Secretariat.

Table 54 Soybean balance sheet of ASEAN countries, 2025

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	422,948	670,514	9,201,116	10,294,578	9,553,181	91,130	650,266	10,294,578
Brunei	-	-	750	750	750	-	-	750
Cambodia	-	*19,590	63,470	83,060	15,322	67,738	-	83,060
Indonesia	208,723	347,448	2,362,950	2,919,121	2,593,364	5,364	320,393	2,919,121
Lao PDR	729	16,000	-	16,729	5,313	-	11,416	16,729
Malaysia	*70,000	-	*800,000	870,000	*790,000	*10,000	70,000	870,000
Myanmar	18,823	222,280	*533	241,636	*198,130	*166	43,340	241,636
Philippines	15,215	456	*195,135	210,806	*174,337	-	36,469	210,806
Singapore	-	-	21,394	21,394	20,831	562	-	21,394
Thailand	-	*18,570	*3,400,000	3,418,570	*3,418,270	300	-	3,418,570
Vietnam	109,458	46,170	2,356,884	2,512,512	2,336,864	7,000	168,648	2,512,512

Remark: * The value is estimated by AFSIS Secretariat.

Table 55 Ratio of soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	519,151	8,814,958	5.89	683,190	9,347,133	7.31	670,514	9,553,181	7.02
Brunei	-	588	-	-	728	-	-	750	-
Cambodia	21,706	18,076	120.08	20,621	16,858	122.32	19,590	15,322	127.86
Indonesia	220,124	2,532,612	8.69	363,306	2,569,146	14.14	347,448	2,593,364	13.40
Lao PDR	10,290	5,775	178.19	20,800	5,545	375.11	16,000	5,313	301.15
Malaysia	-	629,853	-	-	710,000	-	-	790,000	-
Myanmar	198,928	199,706	99.61	210,274	198,536	105.91	222,280	198,130	112.19
Philippines	614	190,000	0.32	601	182,000	0.33	456	174,337	0.26
Singapore	-	21,413	0.00	-	20,250	0.00	-	20,831	0.00
Thailand	19,150	3,303,820	0.58	18,866	3,418,566	0.55	18,570	3,418,270	0.54
Vietnam	48,340	1,913,115	2.53	48,722	2,225,504	2.19	46,170	2,336,864	1.98

Remark: * The value is estimated by AFSIS Secretariat.

Table 56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	326,742	8,814,958	3.71	271,841	9,347,133	2.91	422,948	9,553,181	4.43
Brunei	-	588	-	-	728	0.00	-	750	-
Cambodia	-	18,076	-	-	16,858	0.00	-	15,322	-
Indonesia	162,000	2,532,612	6.40	121,379	2,569,146	4.72	208,723	2,593,364	8.05
Lao PDR	112	5,775	1.94	5,353	5,545	96.54	729	5,313	13.72
Malaysia	64,000	629,853	10.16	65,000	710,000	9.15	70,000	790,000	8.86
Myanmar	6,106	199,706	3.06	6,470	198,536	3.26	18,823	198,130	9.50
Philippines	11,000	190,000	5.79	6,614	182,000	3.63	15,215	174,337	8.73
Singapore	-	21,413	-	-	20,250	-	-	20,831	-
Thailand	-	3,303,820	-	-	3,418,566	-	-	3,418,270	-
Vietnam	83,524	1,913,115	4.37	67,025	2,225,504	3.01	109,458	2,336,864	4.68

Remark: * The value is estimated by AFSIS Secretariat.

Table 57 Quantity and Value of Soybean Export by Countries of Destination in 2024

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														
Indonesia	7.50	5,040							0.05	16				
Lao PDR														
Malaysia	-	17,379				5,586,380							-	172,696
Myanmar														
Philippines	N/A													
Singapore	N/A													
Thailand			26,050	1,412,911			133,051	1,831,550	5,002.00	250,308	9,241	196,900		
Vietnam			-	2,010,082			-	82,417						

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			25,700	14,803,200	14,195	8,176,320	39,895	22,979,520	-	-	39,895	22,979,520
Indonesia	0.0034	15					8	5,146	1,984	871,264	1,992	876,411
Lao PDR							-	-	33,693	12,615,890	33,693	12,615,890
Malaysia		102,498					-	5,878,953	-	123,788	-	6,002,741
Myanmar							-	-	220.00	193,000	220	193,000
Philippines	N/A											
Singapore	N/A											
Thailand	13,475	1,274,777					186,819	4,966,446	22,776	1,008,222	209,595	5,974,668
Vietnam							-	2,092,499	-	164,232	-	2,256,730

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 2024

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	N/A													
Cambodia	N/A													
Indonesia									5,946	2,690,701	0.016	37		
Lao PDR											1,511	703,306		
Malaysia					-	37,369								
Myanmar														
Philippines									253	252,890				
Singapore					3.01	10,047			1,771	2,357,348	0.17	415		
Thailand			500	208,979										
Vietnam			5,383	3,924,845										

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	N/A											
Cambodia	N/A											
Indonesia	0.0110	46.00			0.0020	5.00	5,946	2,690,789	2,156,277	1,149,849,687	2,162,222	1,152,540,476
Lao PDR			9,594	2,252,213	323	164,805	11,428	3,120,324	2,386	1,413,997	13,814	4,534,321
Malaysia	-	4,066					-	41,435	-	279,990,988	-	280,032,422
Myanmar							-	-	835	895,000	835	895,000
Philippines							253	252,890	89,789	52,546,038	90,042	52,798,928
Singapore			0.39	1,222			1,775	2,369,032	19,318	17,184,132	21,093	19,553,164
Thailand							500.00	208,979	2,867,662	1,458,369,123	2,868,162	1,458,578,102
Vietnam							5,383	3,924,845	1,848,074	949,563,741	1,853,457	953,488,586

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	2023	N/A												
	2024	579	551	566	527	551	580	551	566	673	599	585	580	576
Indonesia	2023	446	402	365	600	379	509	461	477	576	492	434	530	472
	2024	428	460	578	342	597	412	511	288	444				451
Lao PDR	2023	N/A												
	2024	343	346	425	380	345	380	357	375	366	372			369
Myanmar	2023		879	943	844					752				854
	2024	879	877											878
Thailand	2023	693	659	665	618	625	599	590	574	572	548	582	592	610
	2024	571	562	527	497	475	463	481	513	511				511

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	2023	666	670	685	679	667	647	626	623	638	637	599	571	642
	2024	572	571	553	528	521	514	522	519	510				534
Lao PDR	2023	383	416	572	518	688	720	581	703	366	450	388	584	531
	2024	468	446	563	413	508	523	525	465	481	400			479
Myanmar	2023	1,140	1,162	1,115	1,039	1,041	1,034	1,111	1,034	1,034		1,034	1,011	1,069
	2024	1,030				1,146		1,149	1,149	900				1,075
Singapore	2023	994	934	962	962	949	943	900	947	927	968	962	949	950
	2024	950	1,011	919	923	932	934	944	907	912	882	882	882	923
Vietnam	2023	672	717	677	651	613	583	575	582	600	604	665	596	628
	2024	575	558	516	500	508	513	508	502	485	491			516

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

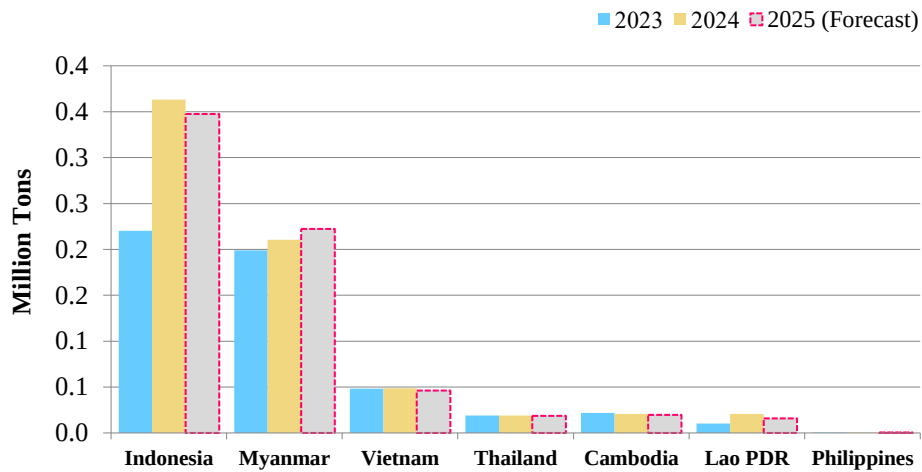


Figure 47 Soybean production of selected countries in ASEAN, 2023 – 2025

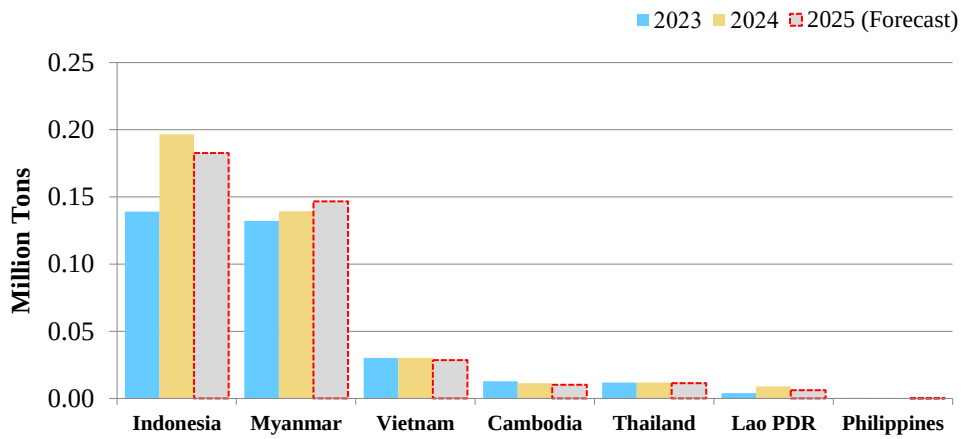


Figure 48 Soybean planted area of selected countries in ASEAN, 2023 – 2025

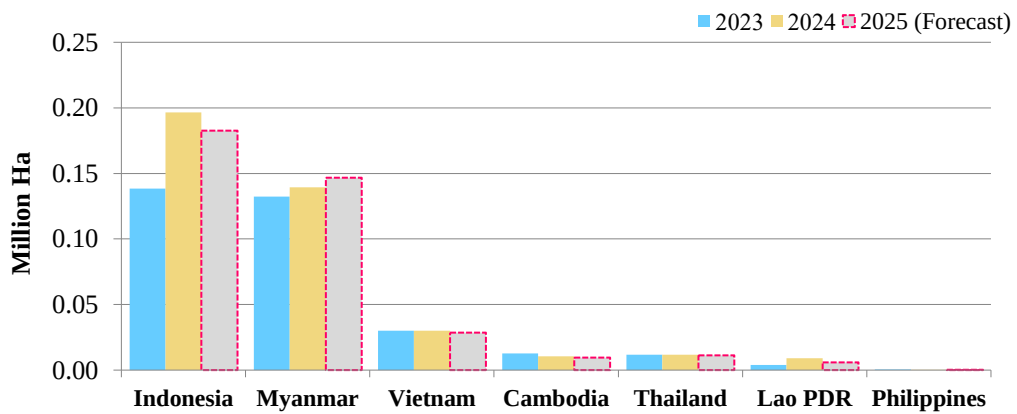


Figure 49 Soybean harvested area of selected countries in ASEAN, 2023 – 2025

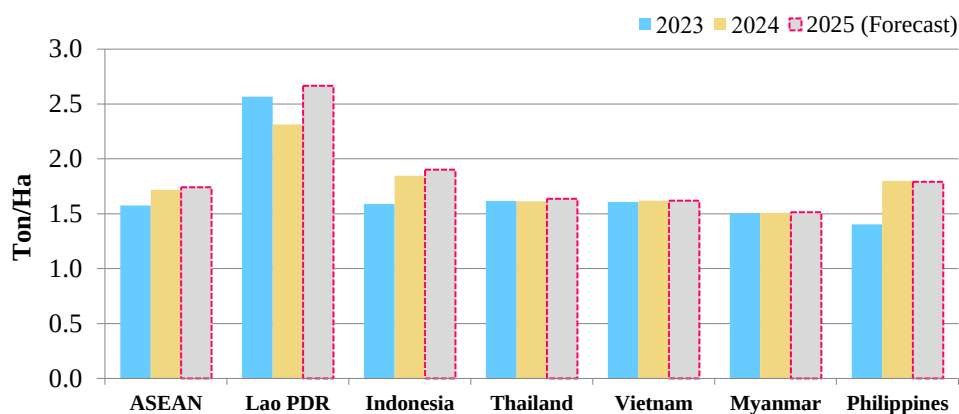


Figure 50 Soybean yield of countries in ASEAN, 2023 – 2025

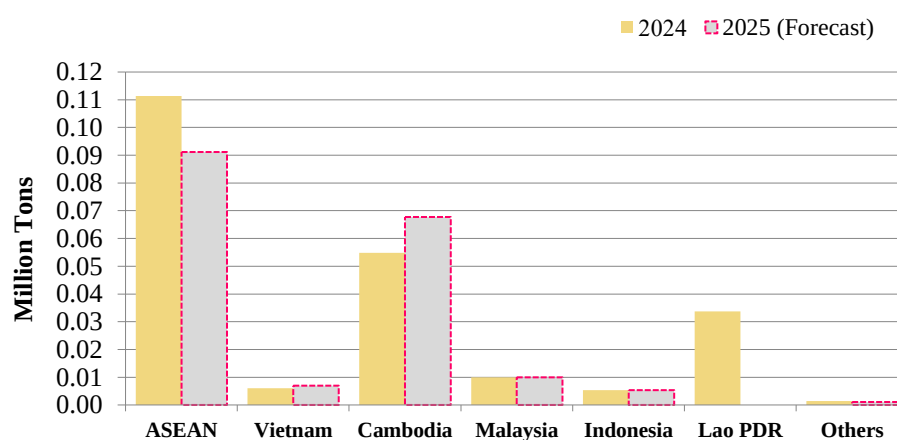


Figure 51 Amount of soybean export (million tons) of selected countries in ASEAN in 2024 – 2025

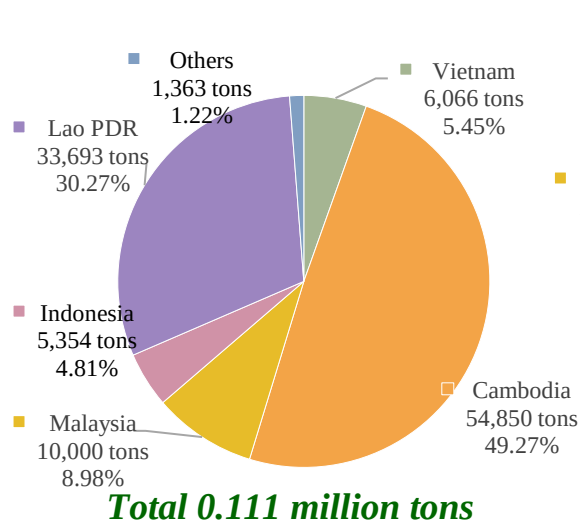


Figure 52 Share of soybean export (tons) among ASEAN countries, 2024

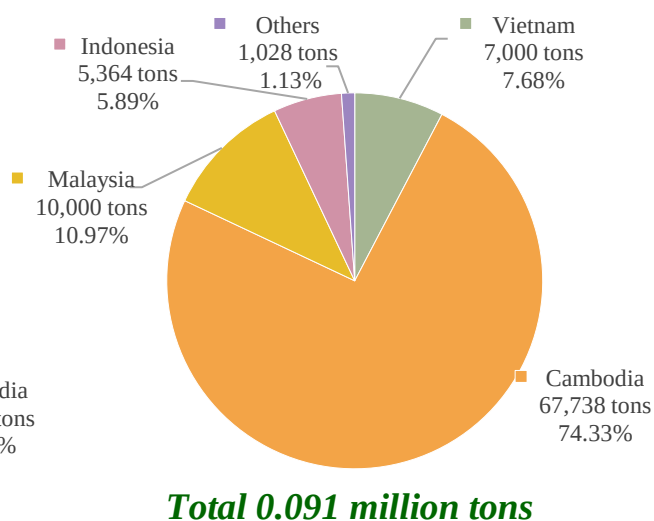


Figure 53 Share of soybean export (tons) among ASEAN countries, 2025

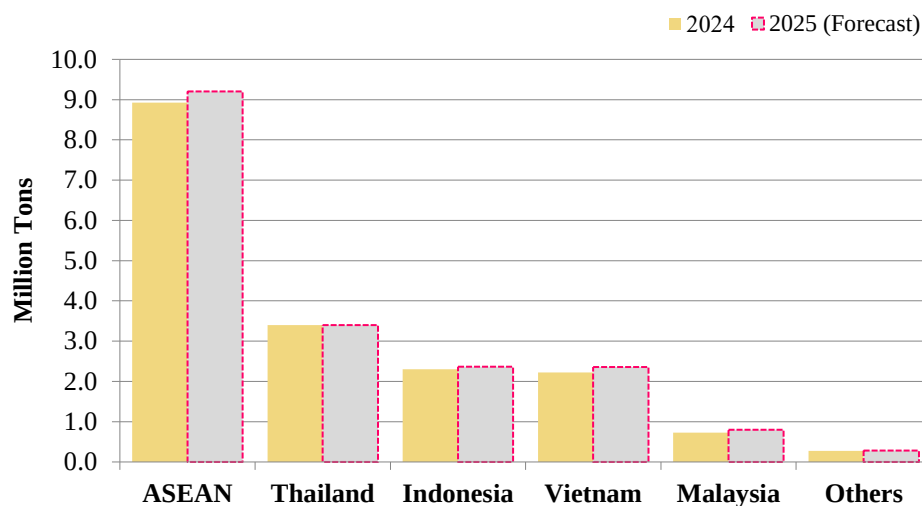


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2024 – 2025

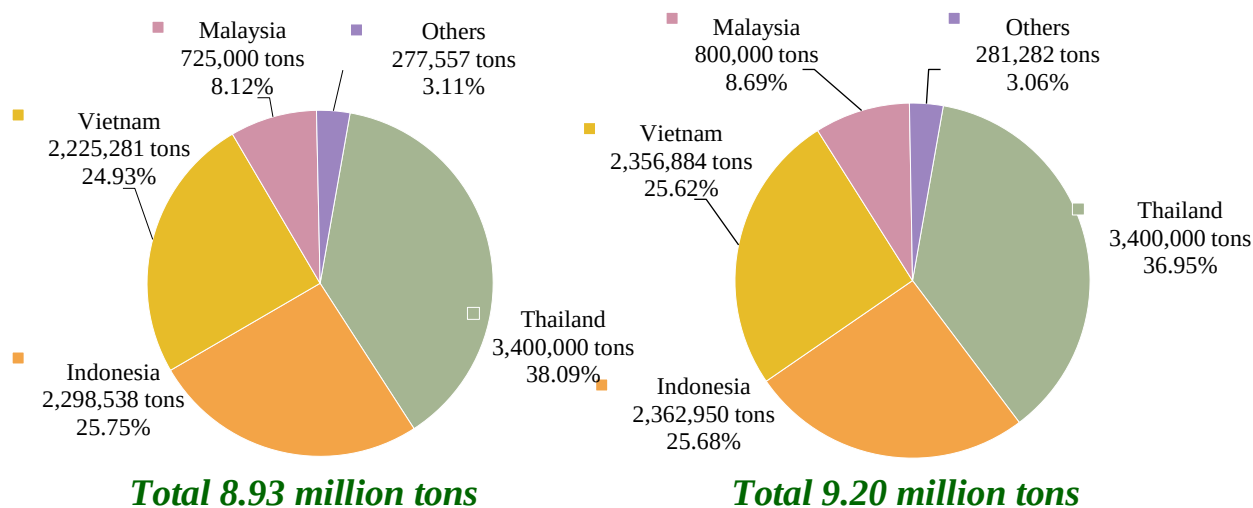


Figure 55 Share of soybean import (tons) among ASEAN countries, 2024

Figure 56 Share of soybean import (tons) among ASEAN countries, 2025

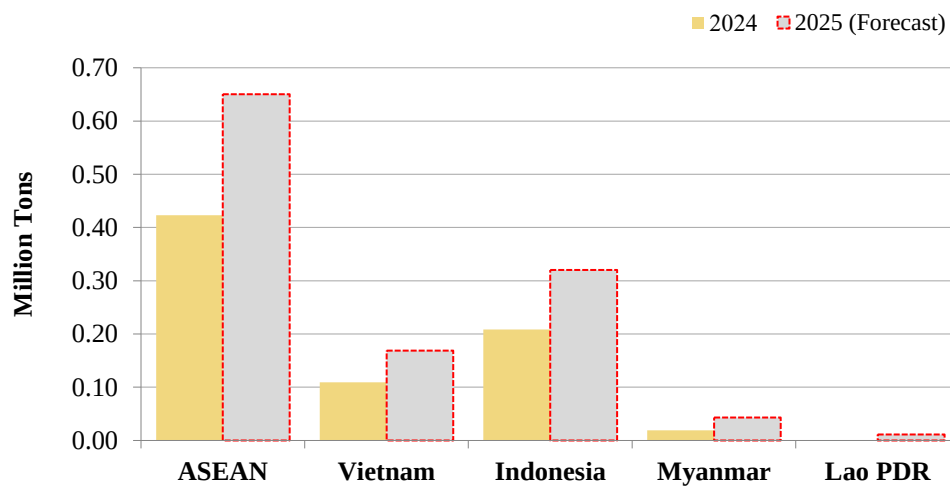


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2024 – 2025

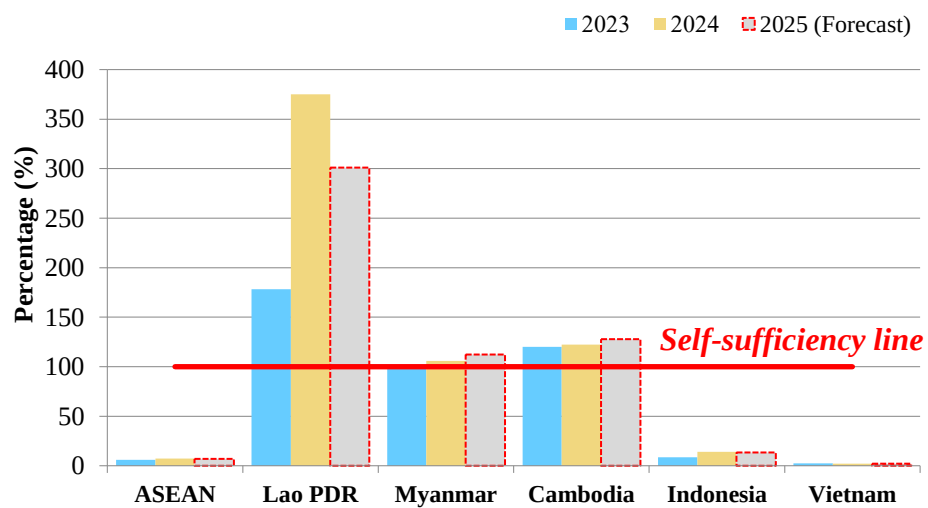


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2023 – 2025

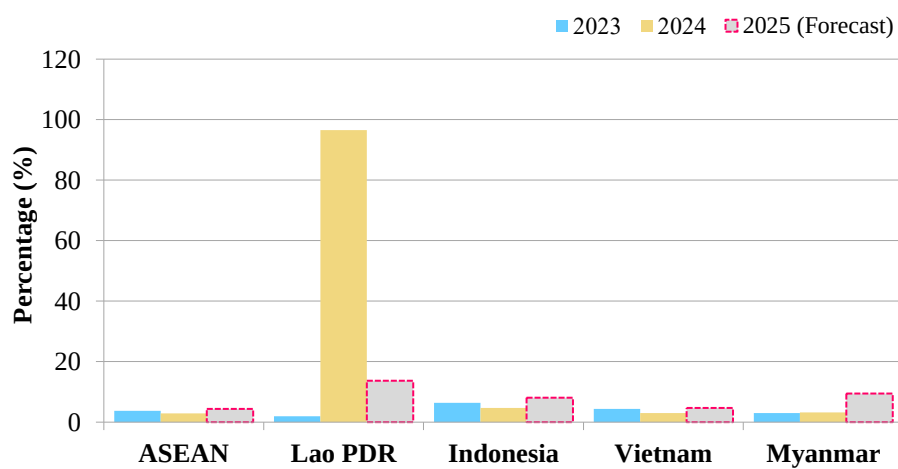


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

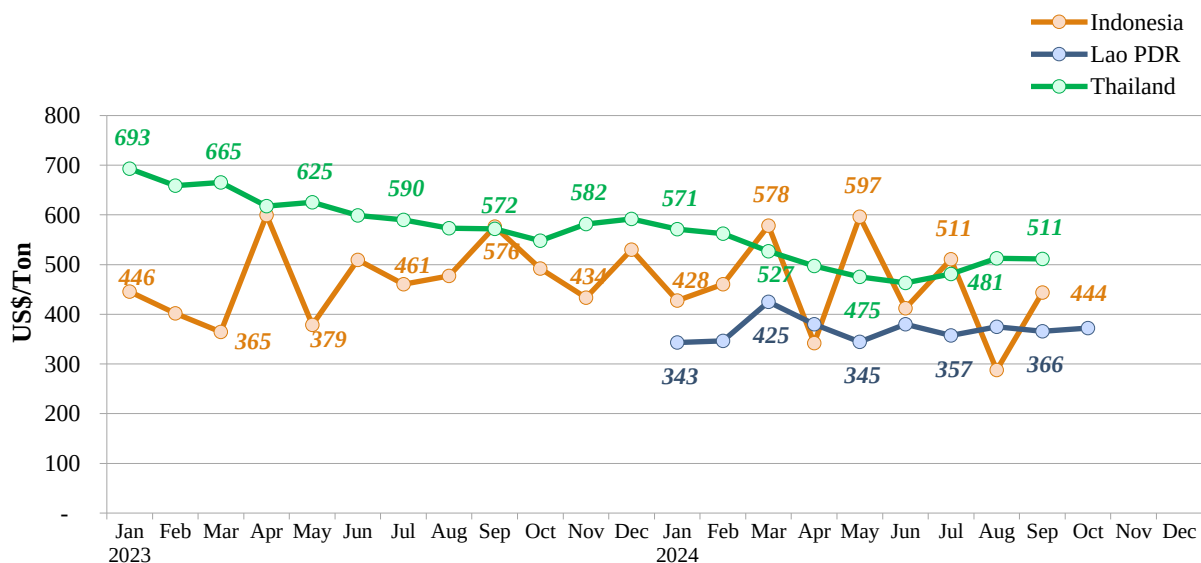


Figure 60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 2023 – 2024

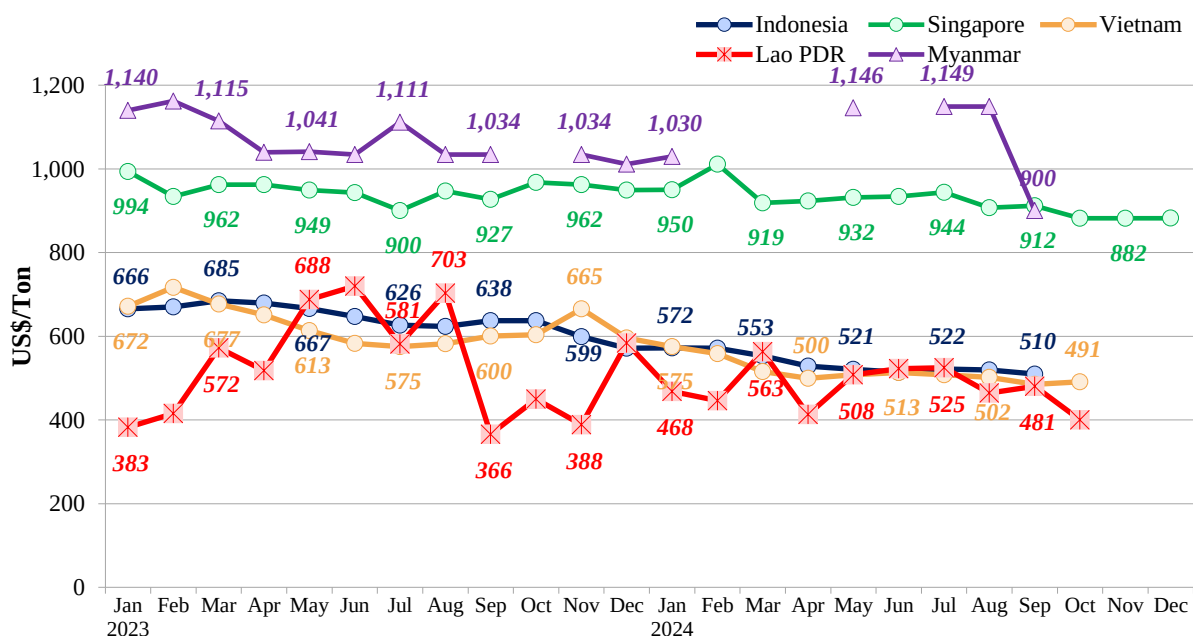


Figure 61 CIF price (US\$/Ton) of soybean of selected countries in ASEAN in 2023 – 2024

Cassava Outlook for 2025



Highlights

The forecast for the supply of cassava in ASEAN indicates an increase from 93.61 million tons in 2024 to 96.16 million tons in 2025, an increase of 2.55 million tons, or 2.72 percent (Table 61). This growth in supply is driven by increases in the beginning stock. The beginning stock is estimated at 15.03 million tons in 2025, an increase of 6.32 million tons, or 72.56 percent, from 8.71 million tons in 2024. Cassava production for 2025 is forecasted at 71.56 million tons, a decrease from 75.18 million tons in 2024. The import of cassava is forecasted to decrease by 0.15 million tons, or 1.54 percent, from 9.72 million tons in 2024 to 9.57 million tons in 2025.

The increase in demand for cassava is primarily attributed to the ending stock. The domestic utilization is forecasted to decrease by 0.72 million tons, or 1.49 percent, from 48.40 million tons in 2024 to 47.68 million tons in 2025. The export is expected to decrease by 1.64 million tons, or 5.43 percent, from 30.18 million tons in 2024 to 28.54 million tons in 2025. The ending stock is expected to increase by 4.90 million tons, or 32.60 percent, from 15.03 million tons in 2024 to 19.93 million tons in 2025.

The production to domestic utilization ratio (self-sufficiency ratio) in 2025 is forecasted to be 150.07 percent, which may decrease from 155.35 percent in 2024. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 31.53 percent in 2025, an increase from 18 percent in 2024.

Table 61 Summary of the ASEAN cassava situation, 2024 - 2025

Unit: Million tons

Items	2024	2025	Change	
			Quantity	%
Supply (Million tons)	93.61	96.16	2.55	2.72
Beginning stock	8.71	15.03	6.32	72.56
Production	75.18	71.56	-3.62	-4.82
Import	9.72	9.57	-0.15	-1.54
Demand (Million tons)	93.61	96.16	2.55	2.72
Domestic utilization	48.40	47.68	-0.72	-1.49
Export	30.18	28.54	-1.64	-5.43
Ending stock	15.03	19.93	4.90	32.60
Ratio of production to domestic utilization (%)	155.35	150.07	-5.28	-
Ratio of beginning stock to domestic utilization (%)	18.00	31.53	13.53	-

ASEAN Cassava Situation in 2024

► **Production**

In 2024 (crop year 2023/24), cassava (root fresh) production in ASEAN was 75.18 million tons, a decrease of 3.66 million tons, or 4.64 percent, from the 78.84 million tons recorded in 2023. A decrease in production was observed in Indonesia, Philippines, Thailand, and Vietnam. However, an increase in cassava production saw in Brunei, Cambodia, Lao PDR, Malaysia, and Myanmar (Tables 62-65 and Figures 62-65).

For **Brunei in 2024**, the increase in production was attributed to the increase in planted area and yield. The increase in planted area and yield were due to farmers taking better care of their crops.

For **Cambodia in 2024**, the increase in production was attributed to the increase in planted area. The increase in planted area was caused by the rising cassava prices, declining prices of competing crops, and government policies despite facing an adverse weather in some areas. Meanwhile, the yield was slightly decreased due to pests' infestations and diseases.

For **Indonesia in 2024**, the decrease in production was attributed to the decrease in planted area. The decrease in planted area was affected by the declining cassava prices and the rising prices of competing crops. Meanwhile, the yield was increased due to favorable weather and farmers taking better care of their crops.

For **Lao PDR in 2024**, the increase in production was attributed to the increase in planted area. The increase in planted area was caused by the rising cassava prices and government policies. The yield was also increased as farmers took better care of their crops, and used more available fertilizer.

For **Myanmar in 2024**, the increase in production was attributed to the increase in planted area and yield. The increase in planted area was driven by favorable weather. Additionally, the increase in yield

was due to farmers taking better care of their crops.

For **Philippines in 2024**, the decrease in production was attributed to the decrease in yield. The decrease in yield was caused by cassava witches' broom, rotting of tubers from frequent rainfall, and the impact of intense heat in some areas. However, the planted area was increased due to the increase in consumer demand.

For **Thailand in 2024**, the decrease in production was attributed to the decrease in planted area and yield. The decreased in planted area was attributed to a shortage of cassava stem for planting caused by a typhoon in September, which led to heavy rainfall and flooding. Additionally, the El Niño phenomenon caused delayed precipitation in early to mid-year 2024, damaging cassava plants and driving up their cassava prices. As a result, some farmers shifted to growing other crops, such as maize, sugarcane, and rubber trees. Furthermore, the yield was also decreased due to drought, diseases like cassava mosaic disease (CMD) and cassava witches' broom, and pests' infestation, including mealybugs and red mites.

For **Vietnam in 2024**, the decrease in production was attributed to the decrease in planted area. The decrease in planted area was affected by the declining cassava prices. Meanwhile, the yield was remained similar to the last year.

► **Utilization and Stock**

In 2024, the estimated domestic utilization of cassava in ASEAN was 48.40 million tons, a decrease of 3.08 million tons, or 5.99 percent, from the 51.48 million tons in 2023 (Tables 67-68). The beginning stock of cassava was 8.71 million tons, an increase of 1.21 million tons, or 16.08 percent, from 7.50 million tons in 2023. The ending stock of cassava in 2024 was estimated to be 15.03 million tons,

an increase of 6.32 million tons, or 72.59 percent, from the 8.71 million tons in 2023.

Cassava production in ASEAN was sufficient to meet demand within the region in 2024. The estimated ratio of production to domestic utilization (self-sufficiency ratio) increased to 155.35 percent in 2024, up from 153.15 percent in 2023 (Table 70, Figure 73).

The ratio of ASEAN's beginning stock to domestic utilization (food security ratio) was estimated to be 18 percent in 2024, up from 14.58 percent in 2023 (Table 71, Figure 74).

In summary, ASEAN's cassava production decreased by 4.64 percent, driven by reduced output in countries like Indonesia, Philippines, Thailand, and Vietnam. However, countries such as Brunei, Cambodia, Lao PDR, Malaysia, and Myanmar saw increases in both planted area and yield. Despite the overall decline in production, ASEAN's domestic utilization of cassava also decreased, and the region maintained a self-sufficiency ratio of 155.35 percent, slightly up from the previous year. Additionally, the beginning and ending stocks of cassava grew significantly, improving the food security ratio to 18

percent, indicating the region's capacity to meet demand and maintain stable supply levels for 2024.

► **Trade**

ASEAN's cassava exports in 2024 totaled 30.18 million tons, a decrease of 4.46 million tons, or 12.88 percent, from 34.64 million tons in 2023. ASEAN's cassava imports in 2024 were 9.72 million tons, an increase of approximately 1.23 million tons, or 14.47 percent, from 8.49 million tons in 2023 (Tables 67-68, Figures 66-67, and 69-70).

The quantity and value of cassava exports by country of destination and the quantity and value of cassava imports by country of origin are provided in Tables 72 and 73, respectively.

► **Prices**

The FOB prices of cassava in Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Thailand, and Vietnam for the years 2023 and 2024, along with the CIF prices in Indonesia, Malaysia, Myanmar, and Singapore, are provided in Tables 74-75.

Prospects for Cassava in 2025

► *Production*

The forecast for cassava production in ASEAN in 2025 is anticipated a total of 71.56 million tons, a decrease of 3.63 million tons, or approximately 4.83 percent, from 75.18 million tons in 2024. A decrease in production is forecasted for Indonesia, Lao PDR, and Philippines. On the other hand, an increase in cassava production is expected in Brunei, Cambodia, Malaysia, Myanmar, Thailand, and Vietnam (Tables 62-65, Figures 62-65).

For **Brunei in 2025**, the production is expected to increase due to the increase in yield, which results from farmers taking better care of their crops.

For **Cambodia in 2025**, the increase in production is attributed to the increase in planted area. This increase in planted area is driven by farmers responding to a price increase. However, the yield is expected to decrease

For **Indonesia in 2025**, the production is expected to decrease due to the decrease in planted area. The decrease in planted area may be affected by the declining cassava prices and the rising prices of competing crops. However, the yield is expected to increase due to favorable weather, farmers' practice to take better care of their crops.

For **Lao PDR in 2025**, the production is expected to decrease due to the decrease in planted area, which results from the rising prices of competing crops and government policies. Meanwhile, the yield is expected to increase as farmers improving better care of crops and using available fertilizer.

For **Vietnam in 2025**, the production is expected to increase due to the increase in the planted area, which is driven by government policies.

► *Utilization and Stock*

The forecast for the domestic utilization of cassava in 2025 is anticipated a decrease to 47.68 million tons, a reduction of 0.71 million tons, or 1.47%, compared to 48.40 million tons in 2024. The beginning stock for 2025 is forecasted to increase to 15.03 million tons, a significant increase of 6.32 million tons, or 72.59 percent, from the 8.71 million tons recorded in 2024. The ending stock for 2025 is expected to be 19.93 million tons, indicating an increase of 4.90 million tons, or 32.59 percent, from the 15.03 million tons reported in 2024 (Tables 68-69).

The forecasted ratio of production to domestic utilization (self-sufficiency ratio) for 2025 is expected to be 150.07 percent, showing a decrease from 155.35 percent in 2024 (Table 70, Figure 73). In term of the ratio of beginning stock to domestic utilization (food security ratio) for 2025 is forecasted to be 31.53 percent, representing an increase from 18 percent in 2024. This indicates a strengthening of the cassava supply situation in 2025 (Table 71, Figure 74).

► *Trade*

The forecast for cassava root fresh exports from ASEAN in 2025 indicates a decrease to 28.54 million tons, a reduction of 1.64 million tons, or 5.43 percent, from 30.18 million tons in 2024. Meanwhile, imports are estimated to decrease to 9.57 million tons in 2025, a decline of approximately 0.15 million tons, or 1.52 percent, from 9.72 million tons in 2024 (Table 68-69, Figures 66, 68, 69, and 71).

Table 62 Cassava production in ASEAN countries, 2023 – 2025

Unit: 1,000 Tons

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	78,840.67	75,183.94	-3,656.73	-4.64	71,556.12	-3,627.82	-4.83
Brunei	0.366	0.371	0.004	1.166	0.398	0.019	5.000
Cambodia	14,189.06	*14,330.95	141.89	1.00	*14,474.26	143.31	1.00
Indonesia	14,445.21	13,748.12	-697.09	-4.83	13,051.03	-697.09	-5.07
Lao PDR	6,255.41	7,206.60	951.19	15.21	3,600.00	-3,606.60	-50.05
Malaysia	45.27	49.13	3.86	8.53	53.32	4.19	8.53
Myanmar	262.68	366.11	103.43	39.38	*510.27	144.16	39.38
Philippines	2,595.49	2,461.50	-133.98	-5.16	*2,336.10	-125.40	-5.09
Singapore	N/A						
Thailand	30,616.59	26,783.23	-3,833.36	-12.52	27,196.49	413.26	1.54
Vietnam	10,430.60	10,237.93	-192.67	-1.85	10,334.26	96.34	0.94

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, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	3,890.39	3,677.20	-213.19	-5.48	3,503.58	-173.62	-4.72
Brunei	N/A						
Cambodia	705.46	*719.57	14.11	2.00	*733.96	14.39	2.00
Indonesia	499.77	437.09	-62.68	-12.54	374.41	-62.68	-14.34
Lao PDR	249.28	283.93	34.65	13.90	138.46	-145.47	-51.23
Malaysia	2.406	2.478	0.07	2.99	2.552	0.07	2.99
Myanmar	23.08	26.19	3.11	13.47	*29.72	3.53	13.47
Philippines	*217.11	*226.86	9.75	4.49	*237.70	10.84	4.78
Singapore	N/A						
Thailand	1,681.79	1,479.03	-202.75	-12.06	1,480.00	0.97	0.07
Vietnam	511.50	502.05	-9.45	-1.85	506.78	4.72	0.94

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, 2023 – 2025**

Unit: 1,000 Hectares

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	3,681.41	3,534.97	-146.44	-3.98	3,394.14	-140.83	-3.98
Brunei	N/A						
Cambodia	699.84	*713.83	14.00	2.00	*728.11	14.28	2.00
Indonesia	499.77	437.09	-62.68	-12.54	374.41	-62.68	-14.34
Lao PDR	249.28	283.50	34.22	13.73	138.46	-145.04	-51.16
Malaysia	2.154	2.219	0.06	3.02	2.285	0.07	2.97
Myanmar	18.89	22.04	3.16	16.70	*25.73	3.68	16.70
Philippines	*217.11	*226.86	9.75	4.49	*237.70	10.84	4.78
Singapore	N/A						
Thailand	1,482.87	1,347.37	-135.50	-9.14	1,380.67	33.31	2.47
Vietnam	511.50	502.05	-9.45	-1.85	506.78	4.72	0.94

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

Table 65 Cassava yield in ASEAN countries, 2023 – 2025

Unit: Ton/Hectare

Country	2023 (2022/23)	2024 (2023/24)	Change 2024 over 2023		2025 (2024/25)	Change 2025 over 2024	
			Quantities	(%)		Quantities	(%)
ASEAN	21.42	21.27	-0.15	-0.70	21.08	-0.19	-0.89
Brunei	N/A						
Cambodia	20.27	*20.08	-0.19	-0.94	*19.88	-0.20	-1.00
Indonesia	28.90	31.45	2.55	8.82	34.86	3.41	10.84
Lao PDR	25.09	25.42	0.33	1.32	26.00	0.58	2.28
Malaysia	21.01	*22.14	1.13	5.38	*23.33	1.19	5.37
Myanmar	13.91	16.61	2.70	19.41	*19.83	3.22	19.39
Philippines	11.95	*10.85	-1.10	-9.21	*9.83	-1.02	-9.40
Singapore	N/A						
Thailand	20.65	19.88	-0.77	-3.73	19.70	-0.18	-0.91
Vietnam	20.39	20.39	0.00	0.00	20.39	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, 2024

Unit: Hectares

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Others	Unspecify	Total
ASEAN	-	75,665	56,000	-	-	-	131,665
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	75,665	56,000	-	-	-	131,665
Vietnam	-	-	-	-	-	-	-

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

Table 67 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	7,504,029	78,840,668	8,488,961	94,833,658	51,479,775	34,642,543	8,711,340	94,833,658
Brunei	-	366	-	366	366	-	-	366
Cambodia	5,291,135	14,189,060	-	19,480,195	8,740,017	3,661,908	7,078,270	19,480,195
Indonesia	-	14,445,214	26,923	14,472,137	14,291,880	180,257	-	14,472,137
Lao PDR	633,441	6,255,410	30,013	6,918,864	6,742,809	143,230	32,825	6,918,864
Malaysia	-	45,266	1,349	46,615	*45,438	1,177	-	46,615
Myanmar	*172,412	*262,679	*208	435,299	*383,346	1,414	50,539	435,299
Philippines	-	*2,595,486	*103,288	2,698,774	*2,697,325	*1,449	-	2,698,774
Singapore	-	-	1,623	1,623	1,620	3	-	1,623
Thailand	*1,147,675	30,616,586	8,200,000	39,964,261	11,100,000	27,700,000	1,164,261	39,964,261
Vietnam	259,366	10,430,600	125,557	10,815,523	7,476,974	2,953,105	385,444	10,815,523

Remark: * The value is estimated by AFSIS Secretariat.**Table 68 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	8,711,340	75,183,936	9,717,540	93,612,816	48,395,985	30,182,113	15,034,718	93,612,816
Brunei	-	371	1	372	372	-	-	372
Cambodia	7,078,270	*14,330,951	-	21,409,221	9,163,001	2,146,822	10,099,398	21,409,221
Indonesia	-	13,748,120	242,941	13,991,061	13,881,976	109,085	-	13,991,061
Lao PDR	32,825	7,206,600	12,938	7,252,363	4,004,485	2,382,896	864,982	7,252,363
Malaysia	-	49,127	3,588	52,715	*52,185	530	-	52,715
Myanmar	50,539	366,110	78	416,727	*375,870	29,283	11,574	416,727
Philippines	-	2,461,502	*130,000	2,591,502	*2,589,902	*1,600	-	2,591,502
Singapore	-	-	1,683	1,683	1,681	2	-	1,683
Thailand	1,164,261	26,783,229	9,100,000	37,047,490	10,700,000	23,000,000	3,347,490	37,047,490
Vietnam	385,444	10,237,926	226,311	10,849,681	7,626,513	2,511,895	711,273	10,849,681

Remark: * The value is estimated by AFSIS Secretariat.**Table 69 Cassava balance sheet of ASEAN countries, 2025 (Cassava roots fresh)**

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	15,034,718	71,556,115	9,570,109	96,160,942	47,682,418	28,543,609	19,934,915	96,160,942
Brunei	-	389	1	390	390	-	-	390
Cambodia	10,099,398	*14,474,260	-	24,573,658	*9,630,119	2,146,822	12,796,717	24,573,658
Indonesia	-	13,051,026	121,901	13,172,927	13,010,681	162,246	-	13,172,927
Lao PDR	864,982	3,600,000	-	4,464,982	3,602,861		862,121	4,464,982
Malaysia	-	53,318	*9,544	62,862	*62,623	*239	-	62,862
Myanmar	11,574	510,268	-	521,842	*400,744	-	121,098	521,842
Philippines	-	*2,336,104	*160,000	2,496,104	*2,494,305	*1,800	-1	2,496,104
Singapore	-	-	1,653	1,653	1,651	2	-	1,653
Thailand	3,347,490	27,196,487	*9,100,000	39,643,977	*10,700,000	*23,500,000	5,443,977	39,643,977
Vietnam	711,273	10,334,263	177,010	11,222,546	7,779,044	2,732,500	711,002	11,222,546

Remark: * The value is estimated by AFSIS Secretariat.

Table 70 Ratio of cassava production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2023 – 2025

Unit: Tons

Country	2023			2024			2025		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	78,840,668	51,479,775	153.15	75,183,936	48,395,985	155.35	71,556,115	47,682,418	150.07
Brunei	366	366	100.00	371	372	99.73	389	390	99.74
Cambodia	14,189,060	8,740,017	162.35	14,330,951	9,163,001	156.40	14,474,260	9,630,119	150.30
Indonesia	14,445,214	14,291,880	101.07	13,748,120	13,881,976	99.04	13,051,026	13,010,681	100.31
Lao PDR	6,255,410	6,742,809	92.77	7,206,600	4,004,485	179.96	3,600,000	3,602,861	99.92
Malaysia	45,266	45,438	99.62	49,127	52,185	94.14	53,318.00	62,623	85.14
Myanmar	262,679	383,346	68.52	366,110	375,870	97.40	510,268	400,744	127.33
Philippines	2,595,486	2,697,325	96.22	2,461,502	2,589,902	95.04	2,336,104	2,494,305	93.66
Singapore	-	1,620	0.00	-	1,681	0.00	-	1,651	0.00
Thailand	30,616,586	11,100,000	275.83	26,783,229	10,700,000	250.31	27,196,487	10,700,000	254.17
Vietnam	10,430,600	7,476,974	139.50	10,237,926	7,626,513	134.24	10,334,263	7,779,044	132.85

Remark: * The value is estimated by AFSIS Secretariat.**Table 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2023 – 2025**

Unit: Tons

Country	2023			2024			2025		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	7,504,029	51,479,775	14.58	8,711,340	48,395,985	18.00	15,034,718	47,682,418	31.53
Brunei	-	366	-	-	372	-	-	390	-
Cambodia	5,291,135	8,740,017	60.54	7,078,270	9,163,001	77.25	10,099,398	9,630,119	104.87
Indonesia	-	14,291,880	-	-	13,881,976	-	-	13,010,681	-
Lao PDR	633,441	6,742,809	9.39	32,825	4,004,485	0.82	864,982	3,602,861	24.01
Malaysia	-	45,438	-	-	52,185	-	-	62,623	-
Myanmar	172,412	383,346	44.98	50,539	375,870	13.45	11,574	400,744	2.89
Philippines	-	2,697,325	-	-	2,589,902	-	-	2,494,305	-
Singapore	-	1,620	-	-	1,681	-	-	1,651	-
Thailand	1,147,675	11,100,000	10.34	1,164,261	10,700,000	10.88	3,347,490	10,700,000	31.28
Vietnam	259,366	7,476,974	3.47	385,444	7,626,513	5.05	711,273	7,779,044	9.14

Remark: * The value is estimated by AFSIS Secretariat.

Table 72 Quantity and Value of Cassava Export by Countries of Destination in 2024

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														
Indonesia	3.00	9,216							4,091.56	1,755,824			3,214	1,601,587
Lao PDR														
Malaysia														
Myanmar									105	16,000				
Philippines														
Singapore	N/A													
Thailand	343	252,722	2,373	2,067,256	343,533	205,346,861	35,901	18,886,023	168,502	95,925,439	5,992	3,928,846	107,194	70,845,600
Vietnam									13,450	7,022,501			13,372	6,852,356

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							3,859,282	436,224,221	3,859,282	436,224,221	-	-
Indonesia	205.70	115,714	33.85	30,499			7,548	3,512,840	8,609	7,346,179	16,157	10,859,018
Lao PDR			439,552	77,923,855	1,111,453	126,352,587	1,551,005	204,276,441	831,891	96,577,373	2,382,896	300,853,814
Malaysia	517	208,506					517	208,506	12.35	41,705	530	250,211
Myanmar			29,094	4,262,000			29,199	4,278,000	84	28,000	29,283	4,306,000
Philippines	14.77	33,611					15	33,611	1,543	1,706,183	1,558	1,739,794
Singapore	N/A											
Thailand	56,769	32,502,965			26,388	23,486,425	746,994	453,242,136	4,263,695	1,975,928,664	5,010,689	2,429,170,800
Vietnam							26,822	13,874,857	2,066,424	941,535,333	2,093,246	955,410,190

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 2024

Quantity: Tons Values: US\$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei	N/A													
Cambodia	N/A													
Indonesia														
Lao PDR														
Malaysia			103	47,548	16	12,530								
Myanmar														
Philippines					3.65	2,678								
Singapore					6.19	44,759			1,631	567,046				
Thailand			1,833,854	186,016,731	344	529,371	2,206,867	367,352,010	34	93,169	33,564	5,459,214	0.0020	28
Vietnam			-	542,779			-	55,833,124						

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	0.001	7.00	267,513	145,300,687	20,102	9,961,125	287,615	155,261,819	11.49	46,747	287,627	155,308,566
Lao PDR			12,938	6,191,264			12,938	6,191,264	-	-	12,938	6,191,264
Malaysia					329	176,031	447	236,108	3,141	4,127,044	3,588	4,363,152
Myanmar			78	213,000			78	213,000	-	-	78	213,000
Philippines							4	2,678	5.26	17,238	9	19,916
Singapore			28.31	64,281			1,666	676,085	17.46	62,759	1,683	738,844
Thailand	2.89	762,296			1,906	1,650,894	4,076,571	561,863,714	14,140	38,205,080	4,090,711	600,068,793
Vietnam			-	1,332,642			-	57,708,545	-	2,546,343	-	60,254,888

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
Cambodia	Starch	2023	595	595	595	595	595	595	595	595	595	595	595	595	595
		2024	585	580	485	457	520	580	576	580	575	581	521	599	553
	Pellets	2023	230	230	230	225	235	235	230	230	231	231	231	231	231
		2024	230	258	233	244	230	249	245	240	246	270	275	273	249
	Shredded	2023	145	145	145	145	145	145	145	145	145	145	145	145	145
		2024	145	145	145	145	145								145
Indonesia	Not specified	2023	2,087	2,201	1,914	1,264	2,827	2,457	2,218	2,207	1,917	1,965	1,978	2,008	2,087
		2024	1,938	1,844	1,423	1,867	2,298	1,867	1,743	1,648	1,671				1,811
Lao PDR	Cassava flour	2023	350	250	350	470	572	597	550	446	433	496	530	490	461
		2024	403	344	356	480	459	451	472	404	479	349			420
	Cassava shredded	2023	140	144	141	251	341	374	232	148	151	225	162	266	214
		2024	159	162	195	182	144	159	219	145	135	132			163
Malaysia	Not specified	2023													-
		2024								89	90	89			89
Myanmar	Cassava flour	2023	271	289	253	336	344	306	342	291	296	303	1,762	298	425
		2024	270	435	392	544	328	827	224	429					431
Thailand	Starch	2023	0	5	3	2	4	0	4	4	1	0	4	0	2.17
		2024	2	3	3										1.00
	Pellets	2023	133	144	138	138	140	203		348	400	333		400	238
		2024	333	333	400	333	333		333	333	333				341
	Shredded	2023	492	515	528	541	558	563	563	563	565	567	569	580	550
		2024	576	573	573	568	551	542	521	520	512	484	476		536
Vietnam	Not specified	2023	289	280	279	279	287	376	390	367	365	354	392	352	334
		2024	357	359	301	358	313	267	313	300	260				314

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	2023	1,000	272											636
		2024			299	295	294	294			289				294
Malaysia	Not specified	2023	647	921	910	425	390	414	833	932	1,191	443	395	402	658
		2024	992	1,207	1,098	1,108	1,099	1,338	434	1,550					1,103
Myanmar	Cassava flour	2023	539	513	569	620	655	598	643	634	613	666	591	625	605
		2024	302	576	561	578	579	661	738	622					577
Singapore	Not specified	2023		600		2,903					2,903	667			1,768
		2024	2,903												2,903

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

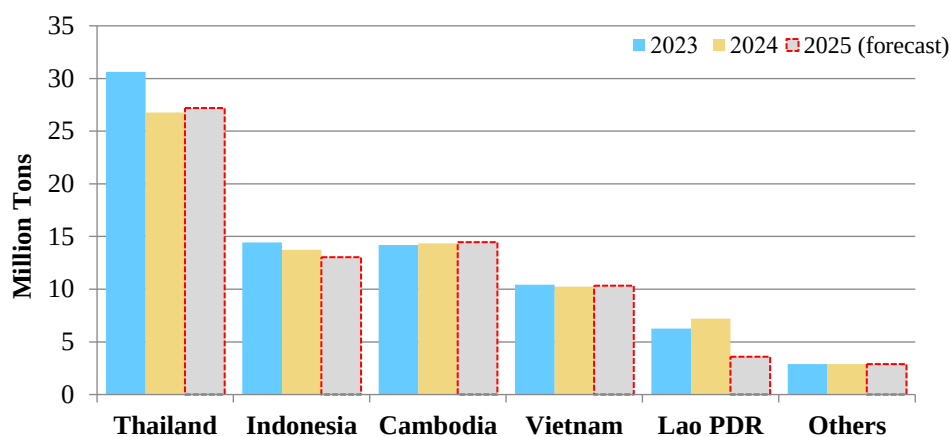


Figure 62 Cassava production of selected countries in ASEAN, 2023 – 2025

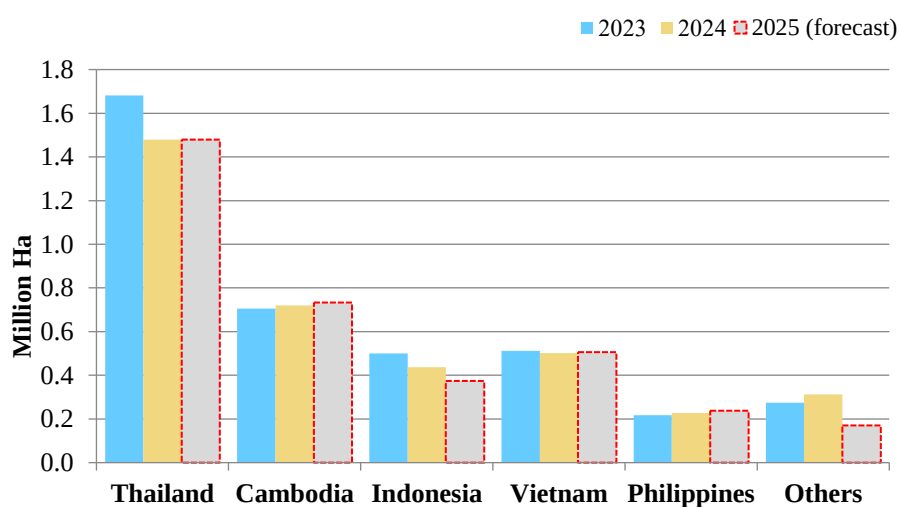


Figure 63 Cassava planted area of selected countries in ASEAN, 2023 – 2025

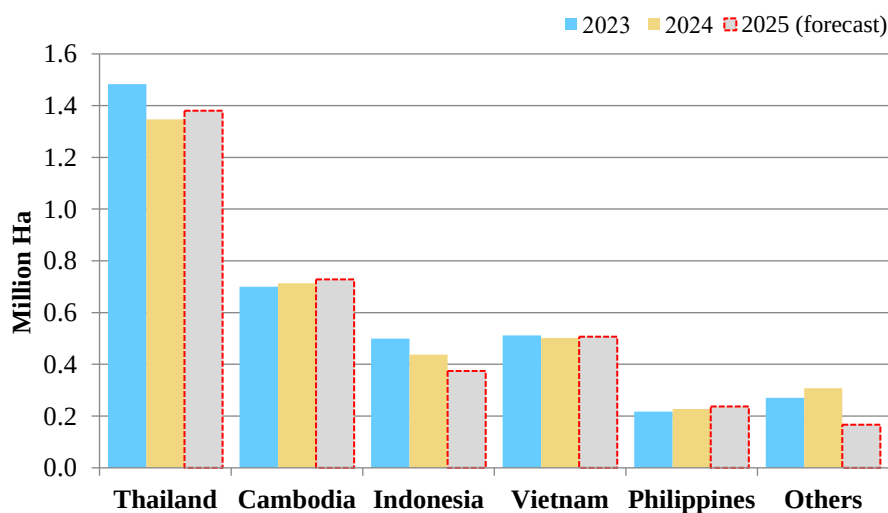


Figure 64 Cassava harvested area of selected countries in ASEAN, 2023 – 2025

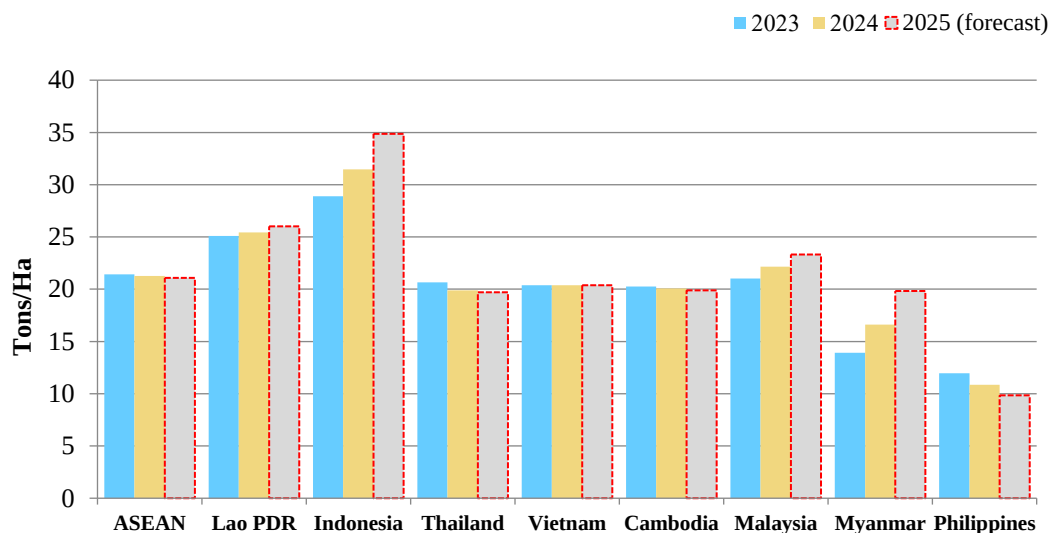


Figure 65 Cassava yield of countries in ASEAN, 2023 – 2025

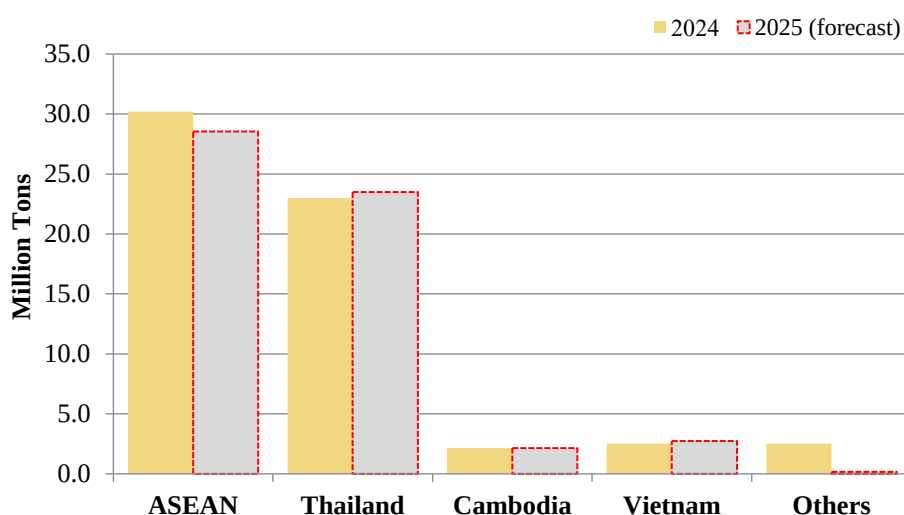
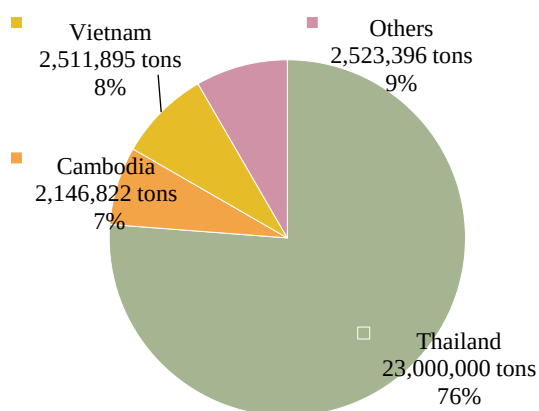
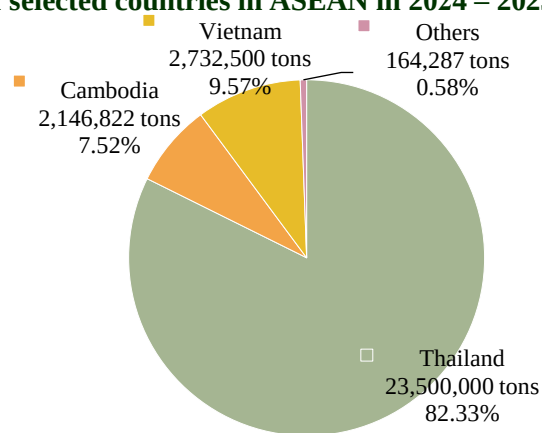


Figure 66 Amount of cassava export (million tons) of selected countries in ASEAN in 2024 – 2025



Total 30.18 Million Tons

Figure 67 Share of cassava export (tons) among ASEAN countries, 2024



Total 28.54 Million Tons

Figure 68 Share of cassava export (tons) among ASEAN countries, 2025

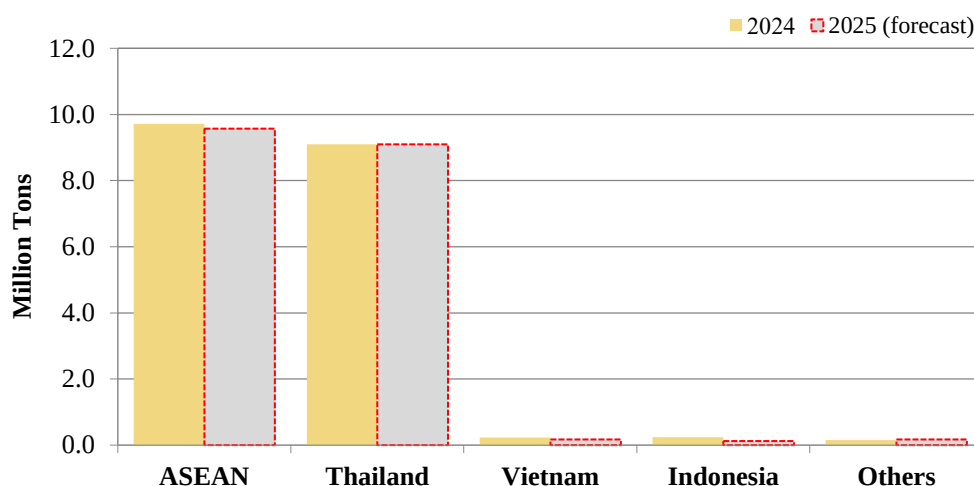
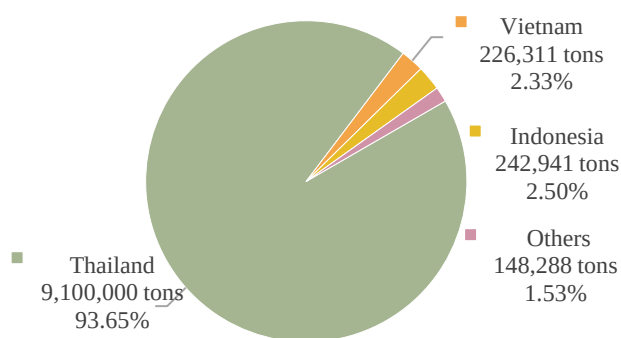
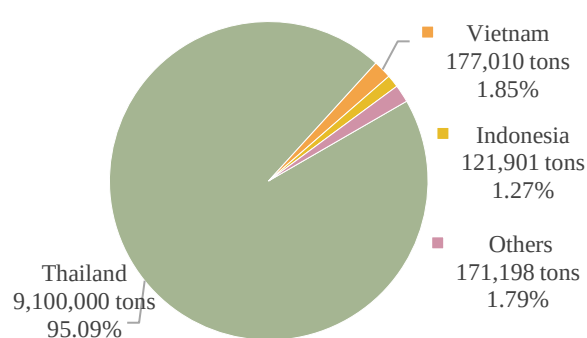


Figure 69 Amount of cassava import (million tons) by selected countries in ASEAN in 2024 – 2025



Total 9.72 Million Tons

Figure 70 Share of cassava import (tons) among ASEAN countries, 2024



Total 9.57 Million Tons

Figure 71 Share of cassava import (tons) among ASEAN countries, 2025

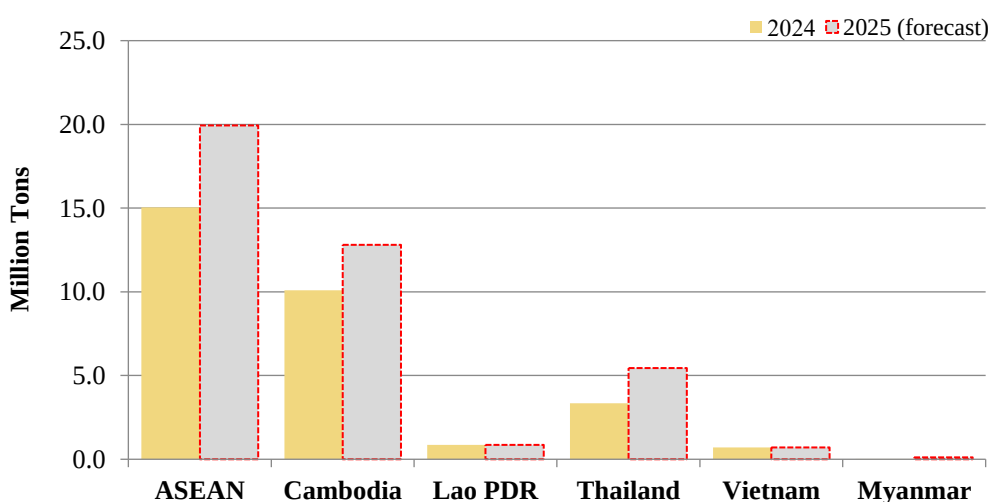


Figure 72 Amount of ending stock of cassava in ASEAN countries in 2024 – 2025

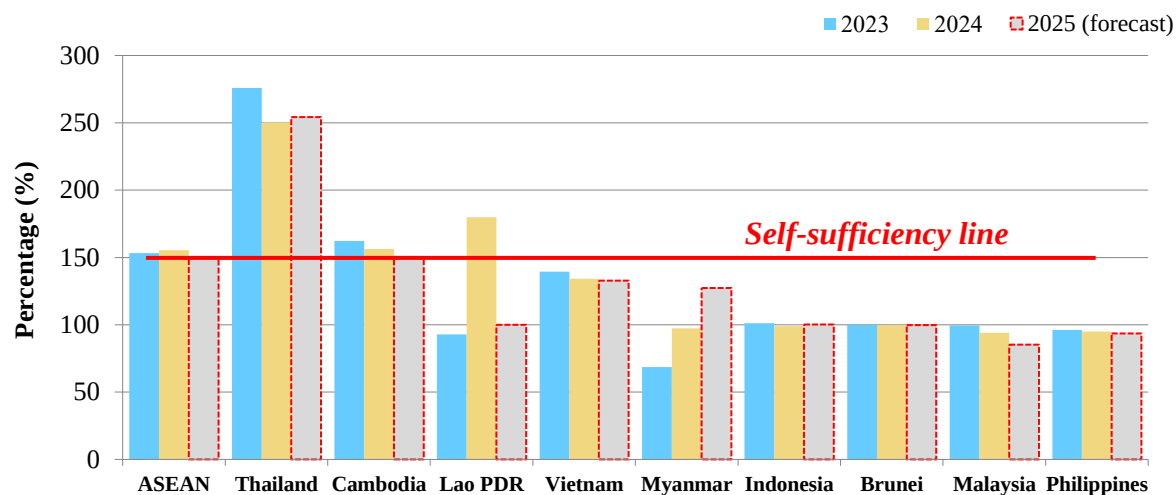


Figure 73 Ratio of cassava production to domestic utilization in ASEAN countries, 2023 – 2025

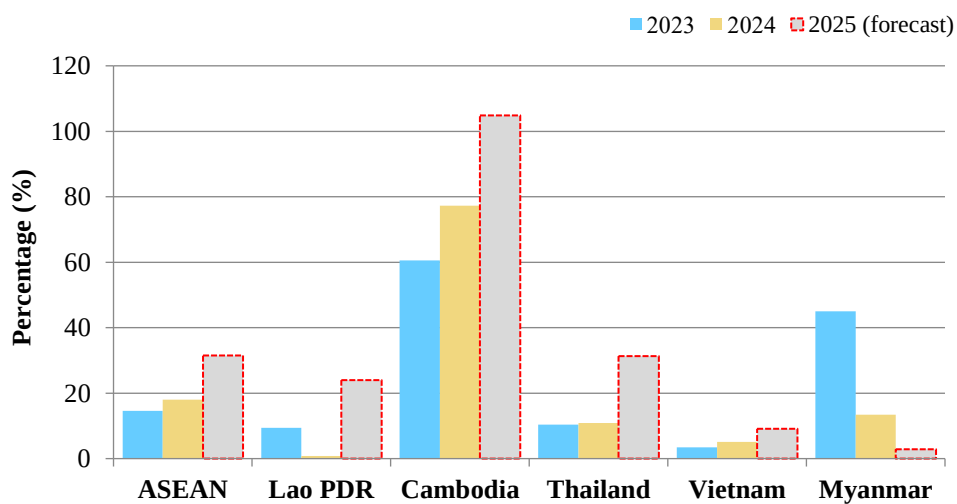


Figure 74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2023 – 2025

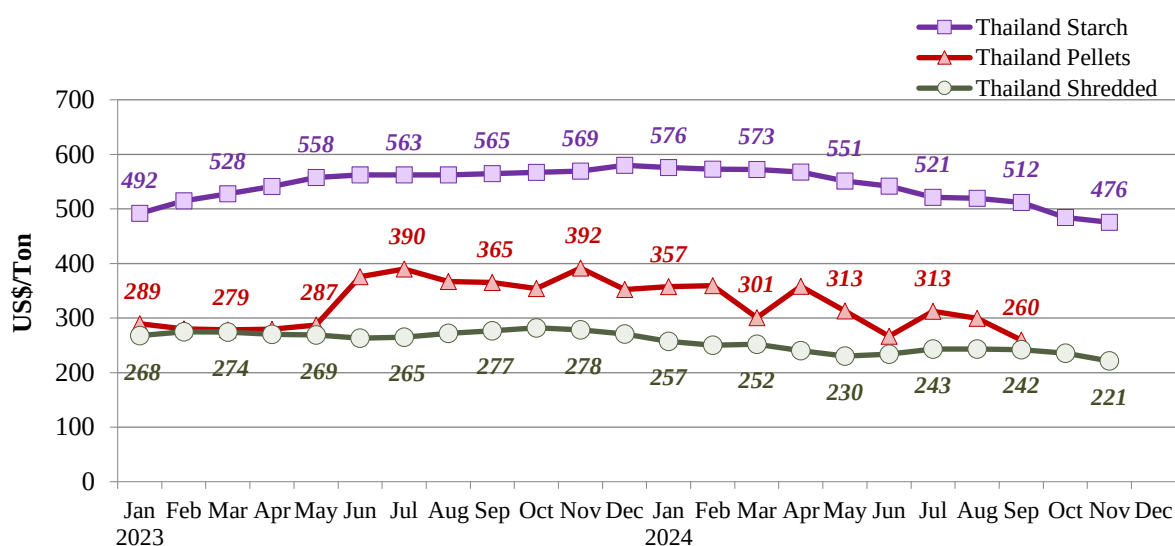


Figure 75 FOB price (US\$/Ton) of cassava of Thailand in 2023 – 2024

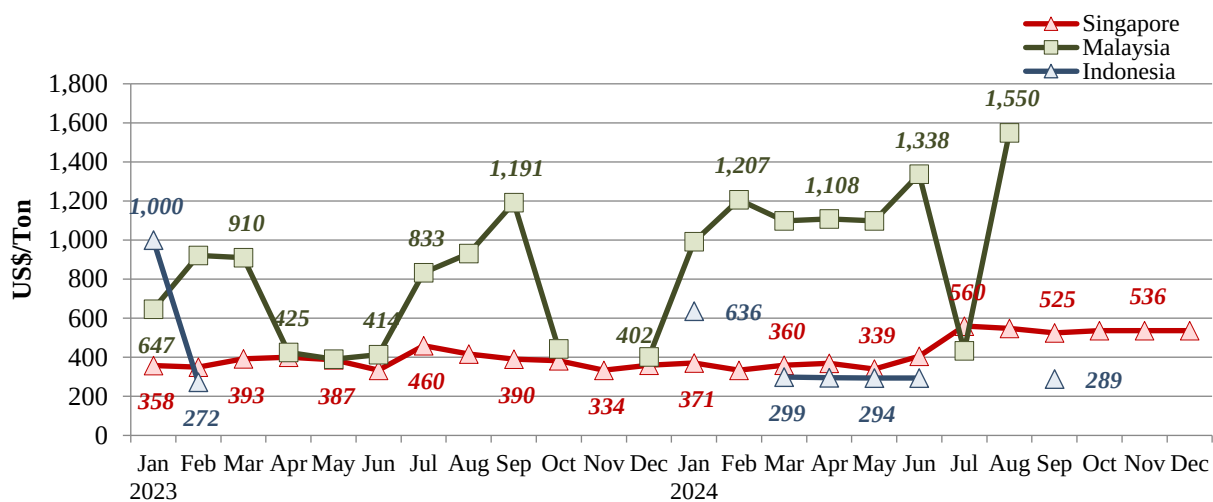


Figure 76 CIF price (US\$/Ton) of cassava selected countries in ASEAN in 2023 – 2024

Explanatory Notes Production of Paddy for 2024

▶ **Brunei:**

- Wet season refers to the crop harvested during January to June 2024.
- Dry season refers to the crop harvested during July to December 2024.

▶ **Cambodia:**

- Wet season refers to the crop harvested during August to December 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Indonesia:**

- Wet season refers to the crop harvested during September 2023 to April 2024.
- Dry season refers to the crop harvested during May to August 2024.

▶ **Lao PDR:**

- Wet season refers to the crop harvested during September to December 2024.
- Dry season refers to the crop harvested during March to May 2024.

▶ **Malaysia:**

- Wet season refers to the crop harvested during August 2023 to February 2024.
- Dry season refers to the crop harvested during March to July 2024.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2023 to February 2024.
- Dry season refers to the crop harvested during February to September 2024.

▶ **Philippines:**

- Wet season refers to the crop harvested during July to December 2023.
- Dry season refers to the crop harvested during January to June 2024.

▶ **Thailand:**

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

▶ **Vietnam:**

❖ **Spring-season**

- North refers to the crop harvested during May to July 2024.
- South refers to the crop harvested during March to June 2024.

❖ **Autumn-season**

- North refers to the crop harvested during August to October 2024.
- South refers to the crop harvested during July to September 2024.

❖ **Winter-season**

- North refers to the crop harvested during October to November 2024.
- South refers to the crop harvested during October to December 2024.



Production of Maize for 2024

▶ Brunei:

- Wet season refers to the crop harvested during January to June 2024.
- Dry season refers to the crop harvested during July to December 2024.

▶ Cambodia:

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during February to March 2024.

▶ Indonesia:

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ Lao PDR:

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during February to May 2024.

▶ Myanmar:

- Wet season refers to the crop harvested during August 2023 to March 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ Philippines:

- Wet season refers to the crop harvested during July to December 2023.
- Dry season refers to the crop harvested during January to June 2024.

▶ Thailand:

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

▶ Vietnam:

- 1st crop harvested during March to June 2024.
- 2nd crop harvested during October to November 2024.



Production of Sugarcane for 2024

▶ Brunei:

- The crop harvested during January to December 2024.

▶ Cambodia:

- The crop harvested during October to December 2023.

▶ Indonesia:

- The crop harvested during September 2023 to November 2024.

▶ Lao PDR:

- The crop harvested during January to May 2024.

▶ Myanmar:

- The crop harvested during October 2023 to March 2024.

▶ Philippines:

- The crop harvested during October 2023 to May 2024.

▶ Thailand:

- The crop harvested during December 2023 to May 2024.

▶ Vietnam:

- The crop harvested during November 2023 to May 2024.



Production of Soybean for 2024

▶ **Cambodia:**

- Wet season refers to the crop harvested during October to November 2024
- Dry season refers to the crop harvested during January to February 2024

▶ **Indonesia:**

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ **Lao PDR:**

- Wet season refers to the crop harvested during September to November 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Myanmar:**

- Wet season refers to the crop harvested during August 2023 to March 2024.
- Dry season refers to the crop harvested during January to April 2024.

▶ **Philippines:**

- Wet season refers to the crop harvested during August to December 2023.
- Dry season refers to the crop harvested during January to June 2024.

▶ **Thailand:**

- Wet season refers to the crop harvested during July to December 2024.
- Dry season refers to the crop harvested during January to May 2024.

▶ **Vietnam:**

- Wet season refers to the crop harvested during February to May 2024.
- Dry season refers to the crop harvested during August to November 2024.



Production of Cassava for 2024

▶ Brunei:

- The crop harvested during January to December 2024.

▶ Cambodia:

- The crop harvested during January to February 2024.

▶ Indonesia:

- 1st crop harvested during January to April 2024.
- 2nd crop harvested during May to August 2024.
- 3rd crop harvested during September to December 2024.

▶ Lao PDR:

- The crop harvested during December 2023 to March 2024.

▶ Malaysia:

- The crop harvested during October 2023 to December 2024.

▶ Myanmar:

- The crop harvested during September 2023 to June 2024.

▶ Philippines:

- 1st crop harvested during September to December 2023.
- 2nd crop harvested during January to June 2024.

▶ Thailand:

- The crop harvested during October 2023 to September 2024.

▶ Vietnam:

- Wet season refers to the crop harvested during September to October 2024.
- Dry season refers to the crop harvested during January to April 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 (2024)

Unit: Tons

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

Extraction Rate of Sugar (2024)

Unit: Tons

Country	Sugarcane	Sugar
ASEAN	1,000	107.43
Cambodia	1,000	100.00
Indonesia	1,000	72.80
Lao PDR	1,000	200.00
Myanmar	1,000	79.94
Philippines	1,000	92.39
Thailand	1,000	106.85
Vietnam	1,000	100.00



ANNEX 1

Rice crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.33 report

Country		2023						2024												2025	
		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																				
	Autumn_South																				
	Winter_North																				
	Winter_South																				

ANNEX 2

Maize crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.33 report

Country	Crop	2023						2024												2025	
		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	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 2023/24 (2024) in ACO No.33 report

Country	2023				2024											
	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 2023/24 (2024) in ACO No.33 report

Country	Crop	2023					2024											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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	Wet season																	
	Dry season																	

ANNEX 5

Cassava crop calendar (harvested months) for crop year 2023/24 (2024) in ACO No.33 report

Country	Crop	2023				2024											
		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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