



ASEAN Food Security Information System

Agricultural Commodity Outlook (ACO) Report

No. 35 – December 2025

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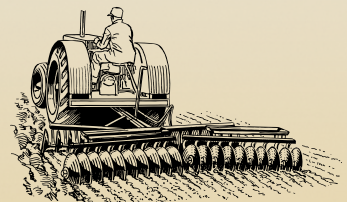
AFSIS Secretariat

Office of Agricultural Economics (OAE)

Ministry of Agriculture and Cooperatives

Bangkok, Thailand

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Report on

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I extend my heartfelt gratitude to all AFSIS Focal Points and their dedicated staff for their unwavering support and invaluable contributions in providing the essential data analyzed in this ACO report No. 35. My sincere thanks to Mr. Charapon Chantorn and Mr. Prachaya Chamarat for their meticulous preparation of ACO forms, data collection from member countries, rigorous analysis, and the creation of this comprehensive report. The timely release of ACO report No. 35 is a testament to the significant contributions, admirable efforts, and hard work of all member countries involved.

This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 35, along with its predecessors, stands as a valuable resource benefiting all ASEAN members, policymakers, 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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Thank you

A handwritten signature in blue ink, appearing to read 'Sumanya' with a stylized flourish at the end.

Dr. Sumanya Ngandee
Computer Technical Officer,
Senior Professional Level,
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, including rice, maize, sugarcane, soybeans, and cassava.

In this preview of the 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 showed in this report. Furthermore, the report is scrutinized by all member states before publication.

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

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Rice Outlook for 2026

Highlights

The forecast for rice supply in ASEAN predicts to rise 13.86 million tons (7.44 percent increases) from 186.27 million tons in 2025 to 200.13 million tons in 2026 of milled rice (Table 1). These increases in supply are primarily attributed to the beginning stock and production, which carried over from the previous year. The beginning stock is forecast to increase by 12.67 million tons (30.51 percent increases) increasing from 41.53 million tons in 2025 to 54.20 million tons in 2026. The rice production in 2026 is forecast to be 136.13 million tons, increasing from 134.74 million tons in 2025, or 1.39 million tons increase. However, the import is forecast to drop by 0.19 million tons (1.90 percent decreases) from 10.00 million tons in 2025 to 9.81 million tons in 2026.

The increase in demand of rice is primarily attributed to the ending stock alone. The ending stock is expected to rise 15.48 million tons (28.56 percent increases) from 54.20 million tons in 2025 to 69.68 million tons in 2026. On the other hand, decreases are showed in both the domestic utilization and export. The domestic utilization is forecast to drop by 1.03 million tons (0.93 percent decreases) from 111.21 million tons in 2025 to 110.18 million tons in 2026. The export is expected to decrease 0.58 million tons (2.78 percent decreases) from 20.86 million tons in 2025 to 20.28 million tons in 2026.

Additionally, the ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2026 is expected to be 123.55 percent, while the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 49.19 percent in 2026 (Table 1).

Table 1. Summary of the ASEAN rice situation from 2025 to 2026 (milled rice)

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	186.27	200.13	13.86	7.44
• Beginning stock	41.53	54.20	12.67	30.51
• Production	134.74	136.13	1.39	1.03
• Import	10.00	9.81	-0.19	-1.90
Demand (Million tons)	186.27	200.13	13.86	7.44
• Domestic utilization	111.21	110.18	-1.03	-0.93
• Export	20.86	20.28	-0.58	-2.78
• Ending stock	54.20	69.68	15.48	28.56
Ratio of production to domestic utilization (%)	121.16	123.55	2.39	-
Ratio of beginning stock to domestic utilization (%)	37.34	49.19	11.85	-

ASEAN Rice Situation in 2025

Production

The paddy production of ASEAN in 2025 (crop year 2024/2025) records at 209.04 million tons, remarking a growth of 9.20 million tons (4.60 percent increases) compared to the 199.84 million tons recorded in 2024 (crop year 2023/2024). Increases are attributed to an increase in planted area of 978.21 thousand hectares (2.12 percent increases), and yield of 0.12 ton/hectare (2.74 percent increases). These increases in production are observed in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Thailand, and Vietnam (Tables 2–5, Figures 1–4).

For Brunei Darussalam in 2025, the production is increased due to a increase in planted area and yield. The increases in planted area are supported by supportive government policies and favorable weather conditions. The increase in yield is also driven by favorable weather conditions and farmers practices of applying more fertilizer and using better rice varieties.

For Cambodia in 2025, the production is increased due to an increase in yield. The yield increases due to fertilizer sufficiency and using rice varieties. Although, the decrease in planted area is affected by unfavorable weather conditions, rising prices of competing crops, declining rice prices, and government policies.

For Indonesia in 2025, the increase in production is attributed to both expansions in the planted area and yield. These increases are driven by favorable weather conditions, rising rice prices, and supportive government policies. Although, the yield is affected due to natural damage such as floods, diseases, pest infestations, and unfavorable weather conditions in some parts of Indonesia, which most affected in the wet season.

For Lao PDR in 2025, the increase in production is attributed to an expansion in planted area. The increase is driven by rising rice prices and supportive government policies. Even the increase in planted area, the yield is decreased due to fertilizer deficits and natural damage such as floods.

For Malaysia in 2025, the production is slightly increased due to expansions in both planted area and yield. The increase in planted area is driven by favorable weather conditions and rising rice prices. Moreover, the increase in yield is due to farmers improving crop management, despite affecting by the disease outbreak in the wet and dry seasons.

For Myanmar in 2025, the decrease in production is attributed to the reduction in planted area. The reduction in planted area is affected by rising prices of competing crops and unfavorable weather conditions. On the other hand, the yield is increased due to farmers improving crop management, applying more fertilizer, and using the high-yield of rice varieties although some damage was caused by natural damage such as floods, earthquakes, and severe rainfalls.

For the Philippines in 2025, the planted area is increased, while yield is decrease. the reduction in yield attributes to the decrease in production, which are influenced by natural damage such as droughts and several typhoons that hit the Philippines this year.

For Thailand in 2025, increases in both planted area and yield contribute to higher rice production. The expansion in planted area is driven by rising rice prices and declining prices of competing crops. Supportive government policies, including financial assistance for farmers planting rice during the dry season, along with higher average water levels in reservoirs compared to last year, also encouraged increased cultivation.

This occurred despite the impacts of La Niña conditions, weather-related disasters during the wet season, and broader economic influences. Yield improvements are mainly attributed to favorable weather conditions and improved crop management practices, particularly effective drought management during the dry season.

For Vietnam in 2025, the increase in rice production is primarily attributed to higher yields, supported by favorable weather conditions and improved crop management. However, reductions in planted area are influenced by government policies and natural damage, particularly from typhoons, which caused severe flooding in several areas.

Utilization and Stock

The domestic utilization of rice (milled rice) in ASEAN in 2025 increases by 2.80 million tons (2.58 percent increases) of 111.21 million tons from 108.41 million tons in 2024 (Tables 7–8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2025 is at 121.16 percent, an increase from 118.85 percent in 2024. The self-sufficiency ratio increases in Brunei Darussalam, Malaysia, Indonesia, Thailand, and Vietnam, while decreases are observed in Cambodia, Myanmar, Lao PDR, Myanmar, and the Philippines. The highest ratio is found in Thailand, Myanmar, and Vietnam, respectively (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 2025 is at 36.85 percent as the suitable level, which increases by 9.90 percent from 2024. The ratios of Cambodia, Myanmar, and Thailand are higher than the suitable level.

Myanmar has the highest ratio at 123.67 percent, which is followed by Thailand at 67.40 percent and Cambodia at 43.44 percent, while other countries are below the suitable level. The beginning stock in 2025 of ASEAN is at 41.53 million tons, increasing 11.78 million tons (39.59 percent increases) from 29.75 million tons in 2024 (Table 11, Figure 13).

In summary, ASEAN's paddy production for the 2024/2025 crop year shows a slightly growth of 4.60 percent from 2024, driven by increased yields in some countries, with notable improvements in Brunei Darussalam, Cambodia, Indonesia, Myanmar, Thailand and Vietnam. However, natural damage, such as floods, droughts, pest infestations, diseases, and unspecified damage, affect production in countries such as Brunei Darussalam, Indonesia, Lao PDR, Myanmar, Malaysia, the Philippines, Thailand, and Vietnam, 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. Moreover, the region also shows a rise in beginning stocks, ensuring food security for the coming year, although some countries still require rice imports to fulfill domestic needs.

Trade

In 2025, the entire ASEAN region exports 20.86 million tons of milled rice, remarking a decrease of 2.11 million tons (9.19 percent decreases) from 22.97 million tons in 2024. Additionally, the two major exporting countries, including Vietnam and Thailand, export approximately 10.09 and 8.03 million tons, respectively (Tables 7–8 and Figures 5–6).

The total rice imports of ASEAN in 2025 are at 10.00 million tons, a decrease of 4.32 million tons (30.17 percent decreases) from 14.31 million tons in 2024. In the Philippines, the import of milled rice is predicted at 4.00 million tons in 2025 (AFSIS forecast), making it the largest importer in the ASEAN region (Tables 7–8, Figures 8–9).

Prices

The quantity and value of rice exports from ASEAN countries by countries of destination and the quantity and value of rice imports by countries of origin are given in Tables 12–13.

Monthly FOB prices for rice exports and CIF prices for rice imports in selected ASEAN countries during 2024 and 2025 (January–December) are presented in Tables 14–15 and Figures 14–16.

Damage Area

In 2025, the estimated damaged area of paddy of ASEAN amounts to 580,731 hectares. Of this, 405,580 hectares, or 69.84 percent, are attributed to floods, while 95,190 hectares, or 16.39 percent, are attributed to unspecified factors. Thailand bore the brunt of the flood damage, accounting for 192,363 hectares, or 33.12 percent. Additionally, factors such as drought, pests, diseases, and other factors contributed to the overall damage (Table 6).

Prospects for Rice in 2026

Production

ASEAN paddy production in 2026 (crop year 2025/2026) is estimated at 211.19 million tons, increasing by 2.15 million tons (1.03 percent increases) from 209.04 million tons in 2025 (Tables 2–5, Figures 1–4).

Utilization and Stock

The domestic utilization of milled rice in ASEAN in 2026 is expected to be 110.18 million tons, a decrease of about 1.03 million tons (0.93 percent decreases), compared to 111.21 million tons in 2025 (Tables 8–9).

The beginning stock for 2026 is forecast at 54.20 million tons, an increase of 12.67 million tons (30.51 percent increases) from the 41.53 million tons recorded in 2025. Additionally, the ending stock is expected to rise by 15.48 million tons (28.55 percent increases), growing from 54.20 million tons in 2025 to 69.68 million tons in 2026 (Tables 8–9 and Figure 11).

The ratio of production to domestic utilization (self-sufficiency ratio) is estimated to be 123.55 percent in 2026, increasing from 121.16 percent in 2025. This indicates that rice production in some regions of ASEAN will still be sufficient, but some countries 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 2026 is estimated to be 49.19 percent, increasing from 37.34 percent in 2025 (Table 11, Figure 13).

Trade

The milled rice imports of ASEAN are estimated to decrease from 10.00 million tons in 2025 to 9.81 million tons in 2026, declining at 0.19 million tons (1.91 percent decreases) (Tables 8–9, Figures 8 and 10).

For the export, the whole ASEAN is estimated to export 20.28 million tons in 2026, declining at 0.58 million tons (2.79 percent decreases), compared to 20.86 million tons in 2025 (Tables 8–9, Figures 5 and 7).

Table 2. Paddy production in ASEAN countries from 2024 to 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	199,838.19	209,039.21	9,201.02	4.60	211,192.58	2,153.37	1.03
Brunei	3.61	4.02	0.41	11.31	4.22	0.20	5.06
Cambodia ^{a/}	13,889.56	14,171.64	282.07	2.03	14,000.00	-171.64	-1.21
Indonesia	53,142.73	60,374.30	7,231.57	13.61	61,325.12	950.82	1.57
Lao PDR	3,750.74	3,752.33	1.59	0.04	3,971.00	218.67	5.83
Malaysia	2,059.10	2,099.81	40.71	1.98	2,120.55	20.74	0.99
Myanmar	30,434.06	30,304.27	-129.79	-0.43	30,138.31	-165.96	-0.55
Philippines	19,633.86	19,017.42*	-616.44	-3.14	19,091.88*	74.46	0.39
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	33,478.38	35,596.01	2,117.63	6.33	35,434.45	-161.56	-0.45
Vietnam	43,446.15	43,719.41	273.26	0.63	45,107.04	1,387.63	3.17

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 3. Paddy planted area in ASEAN countries from 2024 to 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	46,046.44	47,024.65	978.21	2.12	47,719.56	694.91	1.48
Brunei	1.57	1.59	0.02	1.28	1.61	0.02	1.04
Cambodia ^{a/}	3,856.33	3,093.81	-762.51	-19.77	3,800.00	706.19	22.83
Indonesia	10,138.62	11,418.33	1,279.71	12.62	11,397.99	-20.34	-0.18
Lao PDR	916.62	947.58	30.96	3.38	970.00	22.43	2.37
Malaysia	579.81	589.06	9.25	1.59	593.75	4.70	0.80
Myanmar	7,180.50	7,133.30	-47.20	-0.66	7,087.64	-45.66	-0.64
Philippines	4,701.04*	4,804.24*	103.20	2.20	4,743.29*	-60.95	-1.27
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	11,544.91	11,947.95	403.04	3.49	11,872.65	-75.31	-0.63
Vietnam	7,127.06	7,088.80	-38.26	-0.54	7,252.64	163.84	2.31

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Table 4. Paddy harvested area in ASEAN countries from 2024 to 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	45,590.89	46,443.95	853.06	1.87	47,214.43	770.48	1.66
Brunei	1.49	1.51	0.02	1.28	1.56	0.05	3.00
Cambodia ^{a/}	3,814.33	2,998.94	-815.39	-21.38	3,800.00	801.06	26.71
Indonesia	10,046.14	11,355.50	1,309.37	13.03	11,397.99	42.49	0.37
Lao PDR	913.00	925.12	12.12	1.33	970.00	44.89	4.85
Malaysia	574.38	588.78	14.40	2.51	593.47	4.69	0.80
Myanmar	7,163.66	6,998.02	-165.64	-2.31	6,839.02	-159.00	-2.27
Philippines	4,701.04	4,804.24*	103.20	2.20	4,743.29*	-60.95	-1.27
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	11,249.79	11,683.03	433.25	3.85	11,616.45	-66.58	-0.57
Vietnam	7,127.06	7,088.80	-38.26	-0.54	7,252.64	163.84	2.31

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Table 5. Paddy yield in ASEAN countries from 2024 to 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	4.38	4.50	0.12	2.74	4.47	-0.03	-0.67
Brunei	2.42	2.66	0.24	9.92	2.71	0.05	1.88
Cambodia ^{a/}	3.64	4.73	1.09	29.95	3.68	-1.05	-22.20
Indonesia	5.29	5.32	0.03	0.57	5.38	0.06	1.13
Lao PDR	4.11	4.06	-0.05	-1.22	4.09	0.03	0.74
Malaysia	3.58	3.57	-0.01	-0.28	3.57	0.00	0.00
Myanmar	4.25	4.33	0.08	1.88	4.41	0.08	1.85
Philippines	4.18	3.96*	-0.22	-5.26	4.03*	0.07	1.77
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	2.98	3.05	0.07	2.35	3.05	0.00	0.00
Vietnam	6.10	6.17	0.07	1.15	6.22	0.05	0.81

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Table 6. Paddy damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	405,580	74,032	5,389	208	331	95,190	580,731
Brunei	12	5	8	8	0	42	76
Cambodia ^{a/}	0	0	0	0	0	94,871	94,871
Indonesia	55,773	3,273	3,781	0	0	0	62,827
Lao PDR	22,460	0	0	0	0	0	22,460
Malaysia	0	0	0	0	0	0	0
Myanmar	134,947	0	0	0	331	0	135,278
Philippines	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0
Thailand	192,363	70,754	1,600	200	0	0	264,917
Vietnam	25	0	0	0	0	0	25

Remark: - refers to data that is **Not Applicable**.

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Table 7. Rice balance sheet of ASEAN countries in 2024 (milled rice)

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	29,751,625	128,847,517	14,314,450	172,913,592	108,413,840	22,969,985	41,529,767	172,913,592
Brunei	8,551	2,348	29,127	40,025	31,097	0	8,928	40,025
Cambodia ^{a/}	2,603,849	8,889,320	0	11,493,169	7,421,155	645,872	3,426,142	11,493,169
Indonesia	4,134,399	34,021,974	4,381,671	42,538,044	34,135,743	24	8,402,277	42,538,044
Lao PDR	56,953	2,250,444	39,632	2,347,029	2,192,061	45,889	109,079	2,347,029
Malaysia	0	1,317,825	1,686,054	3,003,879	2,900,146	103,733	0	3,003,879
Myanmar	11,356,172	19,209,975	0	30,566,147	12,360,717	1,841,100	16,364,330	30,566,147
Philippines	2,100,000	13,154,688	4,780,000	20,034,688	16,597,208	0	3,437,480	20,034,688
Singapore	0	0	448,295	448,295	260,192	188,103	0	448,295
Thailand	6,716,104	21,760,946	12,971	28,490,021	11,039,810	9,987,265	7,462,946	28,490,021
Vietnam	2,775,597	28,239,998	2,936,700	33,952,295	21,475,711	10,158,000	2,318,584	33,952,295

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Table 8. Rice balance sheet of ASEAN countries in 2025 (milled rice)

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	41,529,767	134,744,118	9,996,485	186,270,370	111,212,784	20,857,898	54,199,687	186,270,369
Brunei	8,928	2,613	25,721	37,262	29,487	0	7,776	37,262
Cambodia ^{a/}	3,426,142	9,069,846	0	12,495,989	7,886,894	665,248	3,943,846	12,495,989
Indonesia	8,402,277	38,651,626	532,810	47,586,713	35,057,311	55	12,529,347	47,586,713
Lao PDR	109,079	2,251,398	34,820	2,395,297	2,287,391	61,683	46,223	2,395,297
Malaysia	0	1,343,880	1,640,914	2,984,794	2,887,728	97,066	0	2,984,794
Myanmar	16,364,330	19,128,054	0	35,492,384	13,232,275	1,641,188	20,618,921	35,492,384
Philippines	3,437,480	12,741,675*	4,000,000*	20,179,155	17,288,305*	0	2,890,850	20,179,155
Singapore	0	0	538,925	538,925	269,267	269,658	0	538,925
Thailand	7,462,946	23,137,405	19,389	30,619,740	11,071,810	8,030,000	11,517,930	30,619,740
Vietnam	2,318,584	28,417,620	3,203,906	33,940,110	21,202,316	10,093,000	2,644,794	33,940,110

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Table 9. Rice balance sheet of ASEAN countries in 2026 (milled rice)

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	54,199,687	136,129,671	9,805,264	200,134,622	110,182,913	20,275,305	69,676,404	200,134,622
Brunei	7,776	2,746	24,048	34,570	29,281	0	5,289	34,570
Cambodia ^{a/}	3,943,846	8,960,000	0	12,903,846	8,096,800	685,206	4,121,841	12,903,846
Indonesia	12,529,347	39,260,339	393,131	52,182,817	31,103,146	804	21,078,867	52,182,817
Lao PDR	46,223	2,382,600	36,258	2,465,081	2,325,052	54,663	85,367	2,465,081
Malaysia	0	1,357,154	1,634,311	2,991,465	2,889,000	102,465	0	2,991,465
Myanmar	20,618,921	19,023,298	0	39,642,219	15,405,214	2,110,430	22,126,575	39,642,219
Philippines	2,890,850	12,791,563*	4,000,000*	19,682,413	17,471,531*	0	2,210,882	19,682,413
Singapore	0	0	493,610	493,610	264,730	228,880	0	493,610
Thailand	11,517,930	23,032,393	20,000	34,570,323	11,079,810	7,530,000	15,960,513	34,570,323
Vietnam	2,644,794	29,319,578	3,203,906	35,168,278	21,518,349	9,562,858	4,087,071	35,168,278

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Table 10. Ratio of rice's production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026

Unit: Ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	128,847,517.30	108,413,840.19	118.85	134,744,118.19	111,212,783.79	121.16	136,129,670.65	110,182,912.88	123.55
Brunei	2,347.83	31,097.33	7.55	2,613.47	29,486.67	8.86	2,745.71	29,280.67	9.38
Cambodia	8,889,319.68	7,421,154.53	119.78	9,069,846.40	7,886,894.08	115.00	8,960,000.00	8,096,799.91	110.66
Indonesia	34,021,973.79	34,135,743.00	99.67	38,651,626.00	35,057,311.00	110.25	39,260,339.00	31,103,146.00	126.23
Lao PDR	2,250,444.00	2,192,060.91	102.66	2,251,398.00	2,287,391.04	98.43	2,382,600.00	2,325,052.30	102.48
Malaysia	1,317,825.00	2,900,146.00	45.44	1,343,880.32	2,887,728.00	46.54	1,357,153.92	2,889,000.00	46.98
Myanmar	19,209,975.00	12,360,717.41	155.41	19,128,054.00	13,232,275.00	144.56	19,023,298.00	15,405,214.00	123.49
Philippines	13,154,688.00	16,597,208.00	79.26	12,741,675.00*	17,288,305.00*	73.70	12,791,563.00*	17,471,531.00*	73.21
Singapore	0.00	260,192.00	0.00	0.00	269,267.00	0.00	0.00	264,730.00	0.00
Thailand	21,760,946.00	11,039,810.00	197.11	23,137,405.00	11,071,810.00	208.98	23,032,393.00	11,079,810.00	207.88
Vietnam	28,239,998.00	21,475,711.00	131.50	28,417,620.00	21,202,316.00	134.03	29,319,578.02	21,518,349.00	136.25

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Table 11. Ratio of rice's beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026

Unit: Ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	29,751,625.36	108,413,840.19	27.44	41,529,766.52	111,212,783.79	37.34	54,199,687.24	110,182,912.88	49.19
Brunei	8,550.90	31,097.33	27.50	8,928.05	29,486.67	30.28	7,775.65	29,280.67	26.56
Cambodia ^{a/}	2,603,849.00	7,421,154.53	35.09	3,426,142.15	7,886,894.08	43.44	3,943,846.31	8,096,799.91	48.71
Indonesia	4,134,399.00	34,135,743.00	12.11	8,402,276.79	35,057,311.00	23.97	12,529,346.79	31,103,146.00	40.28
Lao PDR	56,953.00	2,192,060.91	2.60	109,079.49	2,287,391.04	4.77	46,223.45	2,325,052.30	1.99
Malaysia	0.00	2,900,146.00	0.00	0.00	2,887,728.00	0.00	0.00	2,889,000.00	0.00
Myanmar	11,356,172.00	12,360,717.41	91.87	16,364,329.59	13,232,275.00	123.67	20,618,920.59	15,405,214.00	133.84
Philippines	2,100,000.00	16,597,208.00	12.65	3,437,480.00	17,288,305.00*	19.88	2,890,850.00	17,471,531.00*	16.55
Singapore	0.00	260,192.00	0.00	0.00	269,267.00	0.00	0.00	264,730.00	0.00
Thailand	6,716,104.00	11,039,810.00	60.84	7,462,946.00	11,071,810.00	67.40	11,517,930.00	11,079,810.00	103.95
Vietnam	2,775,597.46	21,475,711.00	12.92	2,318,584.46	21,202,316.00	10.94	2,644,794.46	21,518,349.00	12.29

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Table 12. Quantity and value of rice exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	-	2,085,889	794,580,000	2,085,889	794,580,000	334,179	246,310,000	2,420,068	1,040,890,000
Indonesia	Singapore	1	972	1	972	1	4,433	2	5,405
Lao PDR	Thailand	4,589	2,129,296	17,181	7,883,673	3,095	2,221,534	20,276	10,105,207
	Vietnam	21,770	9,992,246						
Malaysia	Indonesia	90,118	45,654,129	91,499	46,225,033	5,567	2,786,241	97,066	49,011,274
	Singapore	110	63,140						
	Thailand	1,272	507,763						
Myanmar	Cambodia	148	88,000	119,149	42,649,000	1,518,839	8,317,000	1,637,988	50,966,000
	Malaysia	3,827	1,304,000						
	Philippines	110,414	39,600,000						
	Singapore	1,826	678,000						
	Vietnam	2,933	979,000						
Philippines	Indonesia	15.16	45,064	15.32	45,201	277.07	458,676	292.39	503,877
	Vietnam	0.16	137						
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	13,167	13,537,143	578,536	319,086,257	5,220,447	3,061,847,627	5,798,983	3,380,933,884
	Cambodia	934	539,949						
	Indonesia	79,437	49,393,390						
	Lao PDR	40,394	15,935,689						
	Malaysia	165,694	73,058,853						
	Myanmar	7,921	3,749,682						
	Philippines	174,984	74,900,009						
	Singapore	90,031	83,865,115						
	Vietnam	5,975	4,106,427						
Vietnam	Brunei	88	89,448	3,580,071	1,766,478,434	3,580,233	1,894,272,787	7,160,304	3,660,751,221
	Cambodia	35,465	22,041,268						
	Indonesia	35,989	16,450,907						
	Malaysia	410,476	194,748,179						
	Philippines	2,964,083	1,456,304,677						
	Singapore	133,970	76,843,955						

Remark: - is noted that the value is **Not Applicable**.

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Table 13. Quantity and value of rice imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	0.0030	17	33,415	18,241,801	40,344	22,110,922	73,760	40,352,723
	Myanmar	5900	3232610						
	Singapore	0.46	557						
	Thailand	10,900	5,761,870						
	Vietnam	16,615	9,246,747						
Lao PDR	Thailand	13,051	5,516,626	20,108	8,220,403	14,712	7,695,116	34,820	15,915,519
	Vietnam	7,057	2,703,778						
Malaysia	Cambodia	50,721	39,712,233	551,795	294,253,315	542,195	298,857,047	1,093,990	593,110,362
	Thailand	163,014	79,168,324						
	Vietnam	338,060	175,372,758						
Myanmar	-	-	-	-	-	-	-	-	-
Philippines	Cambodia	2,979	1,096,720	3,268,874	1,458,719,548	176,407	179,562,066	3,445,280	1,638,281,614
	Myanmar	121,036	47,261,428						
	Singapore	546	221,400						
	Thailand	198,435	87,758,281						
	Vietnam	2,945,878	1,322,381,719						
Singapore	Cambodia	11,685	18,964,223	293,943	468,529,283	249,440	288,412,705	543,384	756,941,988
	Indonesia	414	264,733						
	Malaysia	1,082	3,786,846						
	Myanmar	4,274	3,752,791						
	Thailand	122,197	238,032,414						
	Vietnam	154,291	203,728,277						
Thailand	Cambodia	260	240,362	8,548	4,855,405	10,842	11,865,613	19,390	16,721,018
	Indonesia	0.0030	33						
	Lao PDR	5,874	3,167,848						
	Myanmar	0.016	86						
	Vietnam	2,414	1,447,076						
Vietnam	Cambodia	-	1,170,820,608	-	1,200,735,092	-	176,168,664	-	1,376,903,756
	Lao PDR	-	17,177,632						
	Myanmar	-	2,213,910						
	Philippines	-	6,509,708						
	Singapore	-	14,492						
	Thailand	-	3,998,742						

Remark: - is noted that the value is **Not Applicable**.

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Table 14. FOB prices 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 ^{a/}	- MLYS ANGKOR Standard 5% broken	2024	950	940	950	940	930	950	945	945	909	935	890	909	933
		2025	900	910	910	920	940	930	940	-	-	-	-	-	921
	- Organic Parboiled Rice Standard 5% broken	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
		2025	1,030	1,050	1,075	1,050	1,100	1,150	1,150	-	-	-	-	-	1,086
Indonesia	Not specified	2024	-	4,760	-	-	2,408	4,850	2,474	-	3,115	3,976	-	-	2,458
		2025	-	-	-	-	-	-	3,221	-	1,992	-	-	-	-
Lao PDR	Mix Milled rice quality 1	2024	477	412	474	382	535	576	572	508	511	312	345	389	458
		2025	385	440	443	498	524	507	450	412	489	465	-	-	442
Malaysia	- HS-code 1006209000	2024	0	0	1,070	955	1,083	0	535	1,078	0	970	1,023	0	959
		2025	963	0	0	1,152	1,317	1,183	1,073	0	1,074	-	-	-	1,127
	- HS-code 1006303000	2024	621	598	541	612	667	631	619	620	655	606	598	0	615
		2025	0	0	626	708	679	0	0	0	0	-	-	-	671
	- HS-code 1006305000	2024	0	0	0	0	0	0	4,342	2,282	799	4,551	0	0	2,994
		2025	0	0	0	0	0	0	0	0	0	-	-	-	-
	- HS-code 1006307000	2024	0	0	0	0	0	0	3,557	1,437	1,509	1,411	0	0	1,978
		2025	0	0	0	0	0	0	0	0	0	-	-	-	-
	- HS-code 1006309900	2024	485	492	547	578	581	627	597	620	612	548	0	481	561
		2025	526	611	629	565	484	438	447	443	438	-	-	-	509
	- HS-code 1006409000	2024	0	0	0	0	0	0	0	353	0	0	0	0	353
		2025	0	0	0	0	0	0	0	0	2,509	-	-	-	2,509
	- HS-code 1006409100	2024	0	0	0	0	0	0	0	0	0	0	0	0	0
		2025	364	0	0	0	0	0	0	0	0	-	-	-	364
	Not specified	2024	573	582	588	595	575	567	576	535	514	505	508	510	552
		2025	473	469	437	409	475	354	373	374	350	-	-	-	413
Thailand	- Thailand Hommali Rice 100%	2024	880	872	854	852	899	905	914	976	1,091	1,114	897	926	932
		2025	943	947	984	1,000	1,074	1,093	1,056	1,059	1,098	1,088	961	-	1,028
	- White Rice 5%	2024	660	624	613	594	637	632	590	589	566	516	511	527	588
Vietnam	Not specified	2025	478	437	422	416	431	419	391	375	371	354	354	-	404
		2024	695	661	631	619	610	626	601	598	624	641	630	624	630
		2025	593	514	492	501	526	527	483	503	498	515	-	-	515

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 15. CIF prices 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	HS-code 10063099	2024	636	659	658	652	635	623	611	586	578	569	558	530	608
		2025	530	33,000	-	-	36,000	-	-	632	619	-	-	-	14,156
Lao PDR	Mix Milled rice quality 1	2024	492	246	382	393	340	371	528	417	610	596	533	589	458
		2025	381	420	412	422	452	455	473	564	517	423	-	-	452
Malaysia	- HS-code 1006101000	2024	0	0	0	0	0	0	0	4,748	0	3,456	0	0	4,102
		2025	1,552	0	0	0	0	0	0	0	0	-	-	-	1,552
	- HS-code 1006209000	2024	534	496	0	0	0	0	0	0	0	0	0	494	508
		2025	0	0	0	0	0	0	0	0	0	-	-	-	0
	- HS-code 1006303000	2024	635	648	636	622	638	631	642	647	666	596	902	655	660
		2025	761	636	613	633	631	643	617	618	661	-	-	-	646
	- HS-code 1006304000	2024	771	878	861	888	889	921	1,124	1,056	961	894	0	1,014	933
		2025	1,285	1,012	1,296	0	0	1,060	0	1,299	1,267	-	-	-	1,203
	- HS-code 1006305000	2024	1,030	929	1,070	991	993	1,001	1,006	967	1,077	942	973	914	991
		2025	939	858	843	880	776	829	797	824	828	-	-	-	842
	- HS-code 1006307000	2024	763	800	814	763	757	754	789	776	757	735	853	798	780
		2025	854	785	708	764	676	622	654	671	680	-	-	-	713
	- HS-code 1006309100	2024	550	563	609	740	776	764	636	712	671	559	881	605	672
		2025	556	837	792	854	0	0	582	651	0	-	-	-	712
	- HS-code 1006409000	2024	585	621	632	617	612	602	613	635	657	573	583	618	612
		2025	536	541	504	528	491	463	465	478	430	-	-	-	493
	- HS-code 1006409900	2024	478	0	0	0	0	504	511	0	485	452	438	474	477
		2025	477	379	0	414	0	0	0	0	333	-	-	-	401
Singapore	Not specified	2024	811	799	729	791	821	782	788	819	783	759	688	735	775
		2025	701	633	699	609	573	579	665	652	625	594	624	648	634

Remark: - is noted that the value is **Not Applicable**.

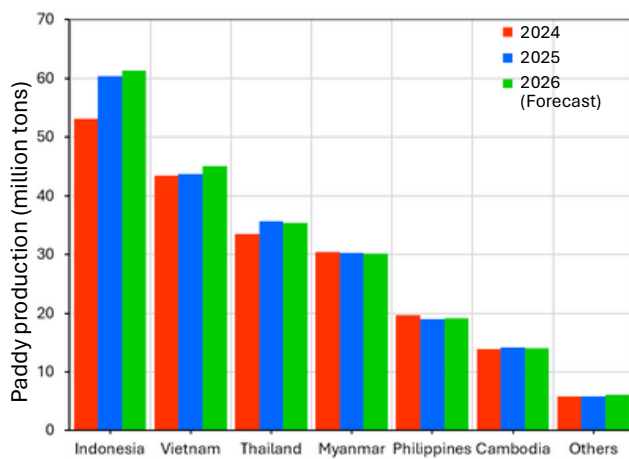


Figure 1. Paddy production of selected countries in ASEAN from 2024 to 2026.

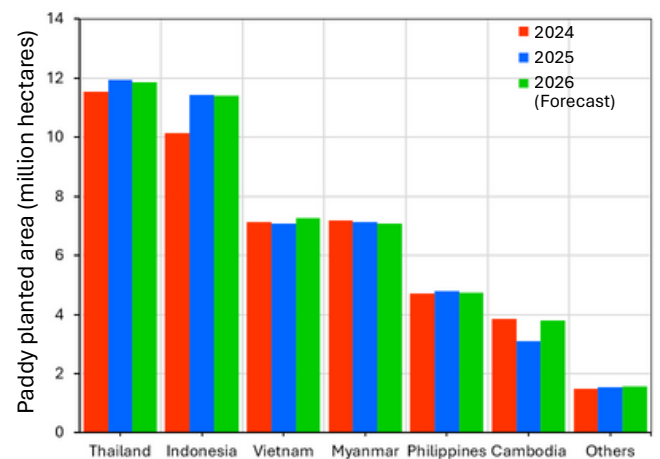


Figure 2. Paddy planted area of selected countries in ASEAN from 2024 to 2026.

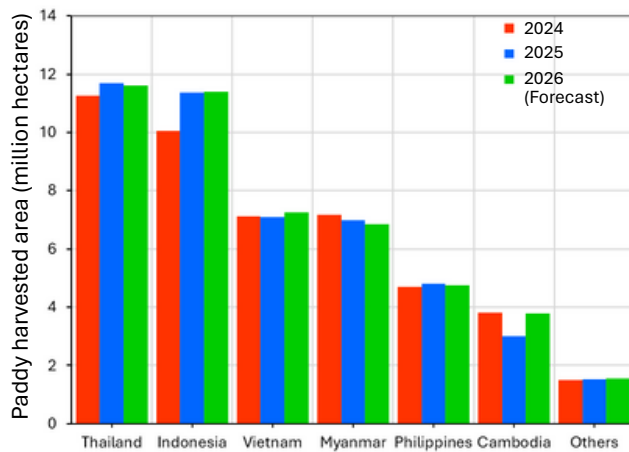


Figure 3. Paddy harvested area of selected countries in ASEAN from 2024 to 2026.

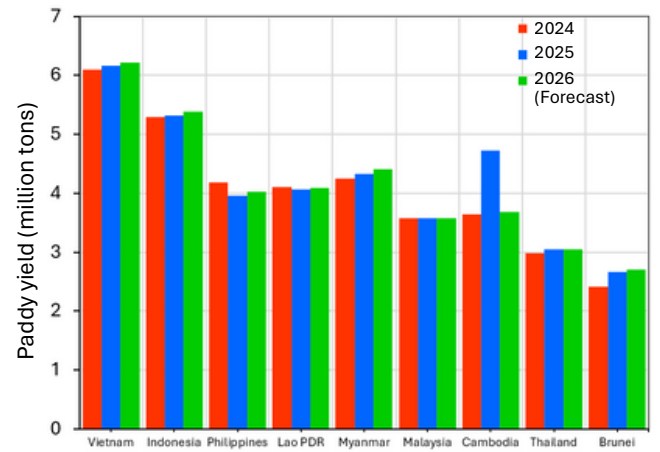


Figure 4. Paddy yield of selected countries in ASEAN from 2024 to 2026.

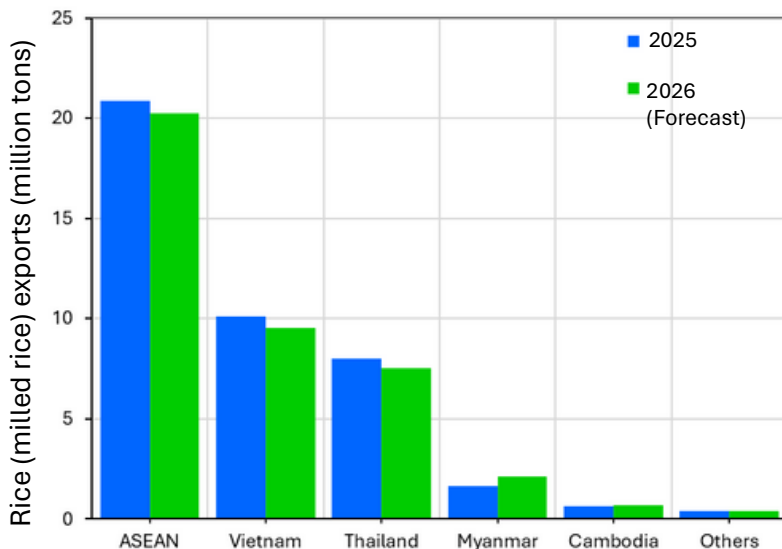


Figure 5. Amount of rice exports of selected countries in ASEAN from 2025 to 2026.

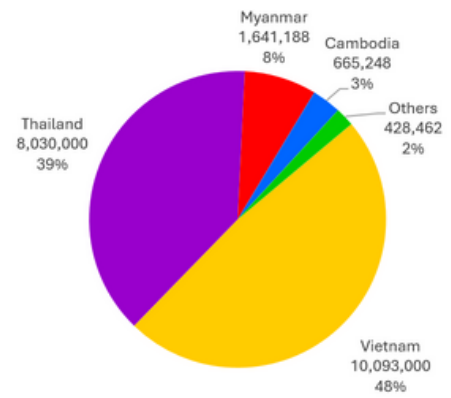


Figure 6. Share of rice exports (tons) among ASEAN countries in 2025, totaling 20.86 million tons.

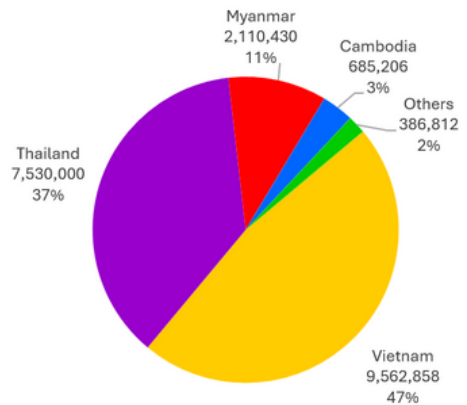


Figure 7. Share of rice exports (tons) among ASEAN countries in 2026, totaling 20.76 million tons.

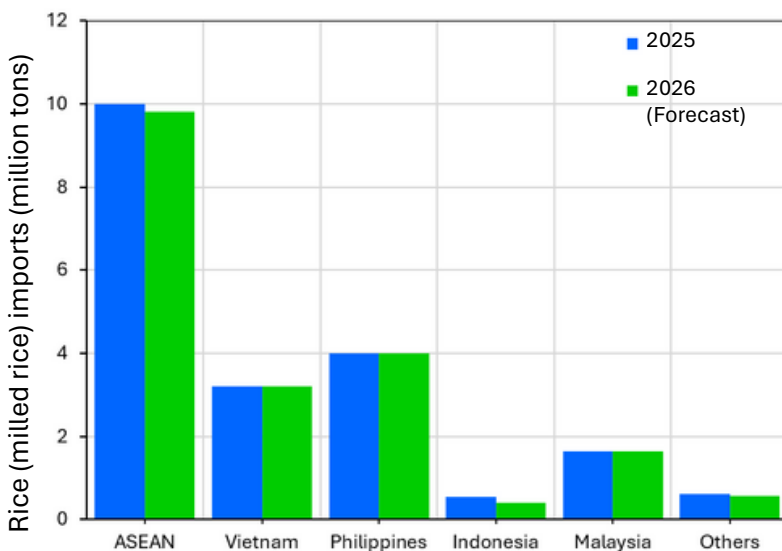


Figure 8. Amount of rice imports of selected countries in ASEAN from 2025 to 2026.

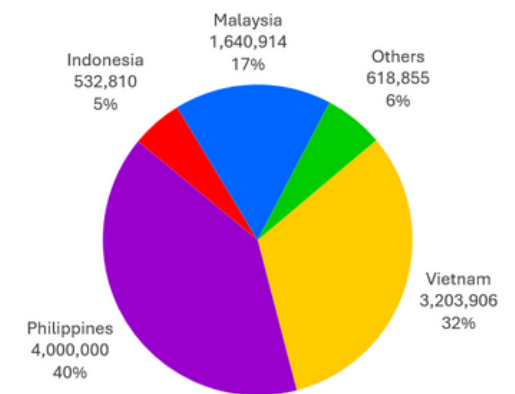


Figure 9. Share of rice imports (tons) among ASEAN countries in 2025, totaling 10.00 million tons.

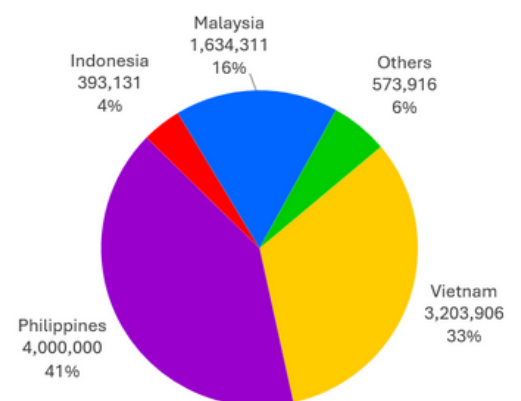


Figure 10. Share of rice imports (tons) among ASEAN countries in 2026, totaling 9.81 million tons.

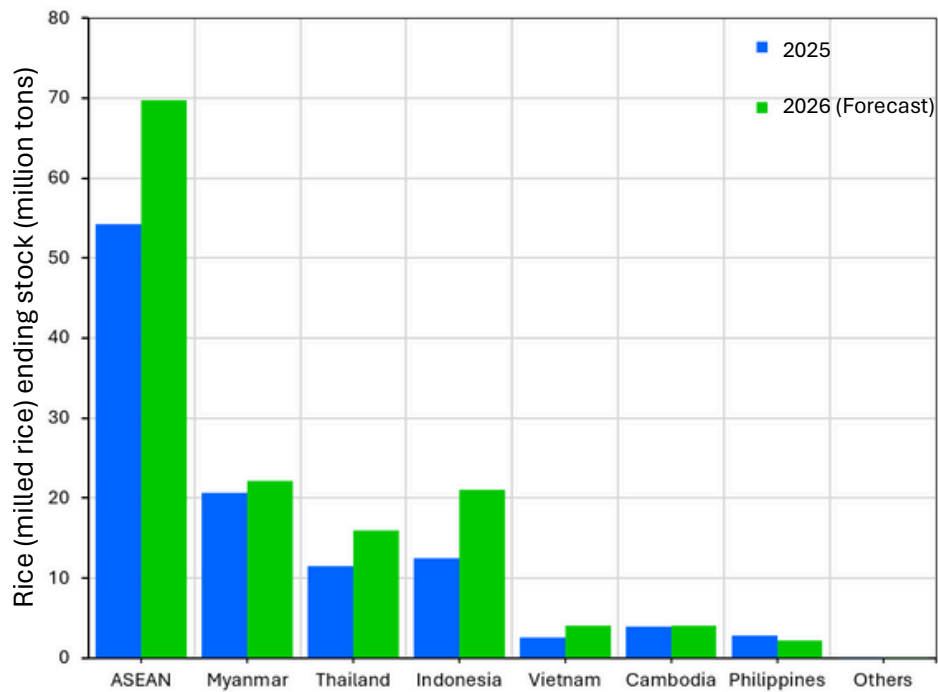


Figure 11. Amount of ending stock of rice in ASEAN from 2025 to 2026.

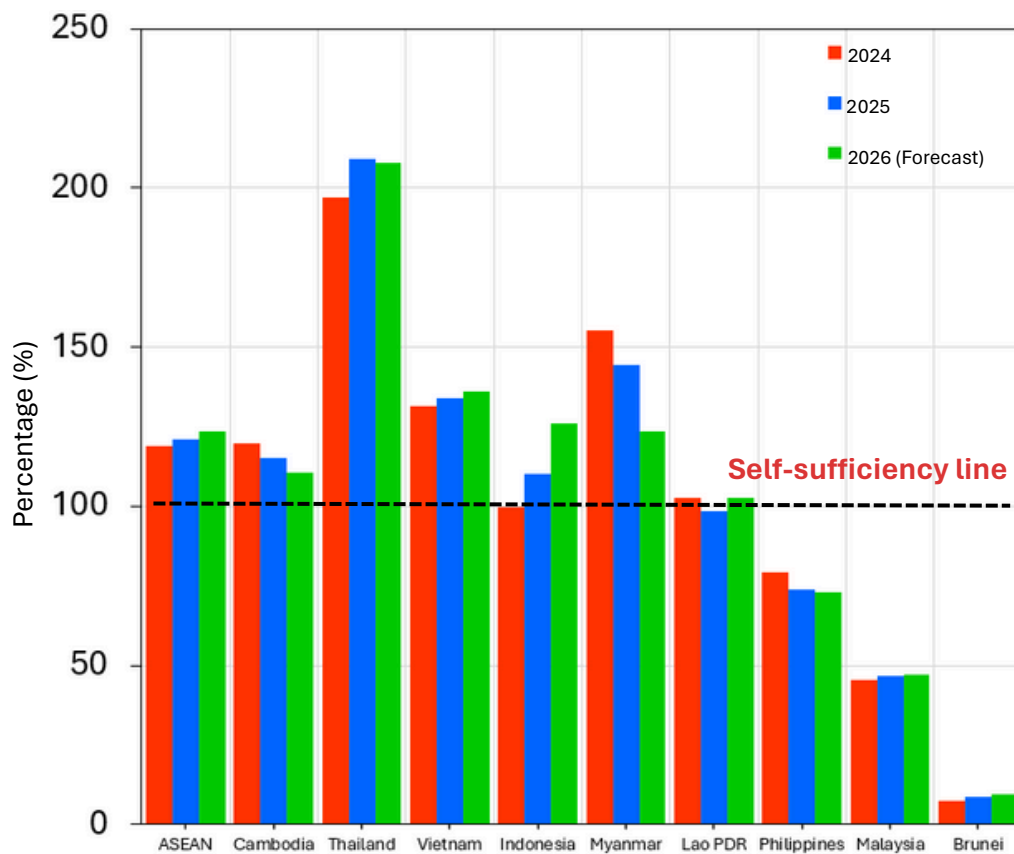


Figure 12. Ratio of rice production to domestic utilization in ASEAN from 2024 to 2026.

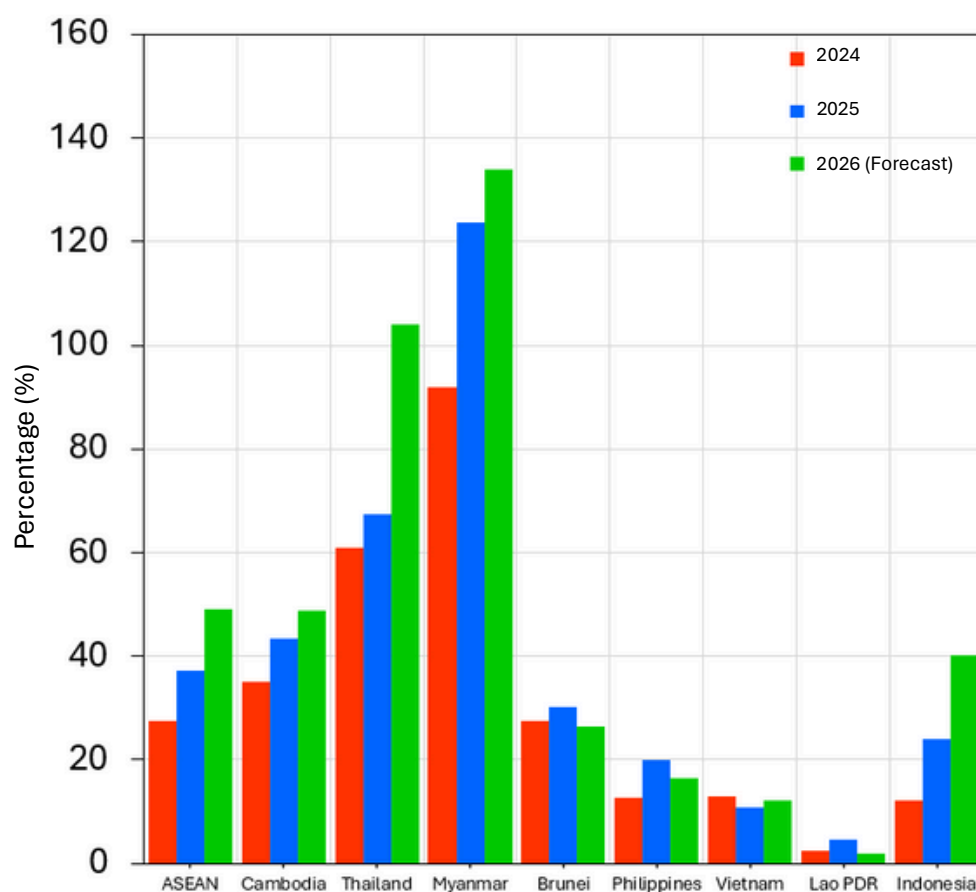


Figure 13. Ratio of rice beginning stock to domestic utilization in ASEAN from 2024 to 2026.

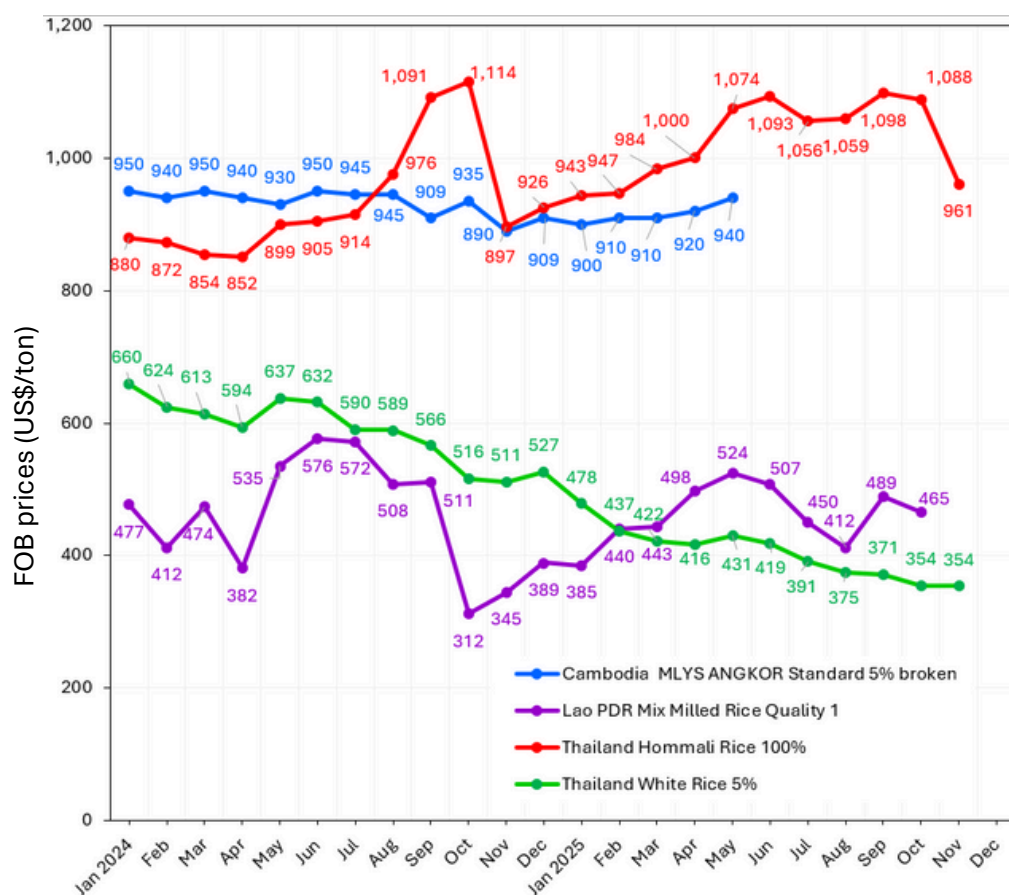


Figure 14. FOB prices (US\$/ton) of milled rice of selected countries in ASEAN from 2024 to 2025.

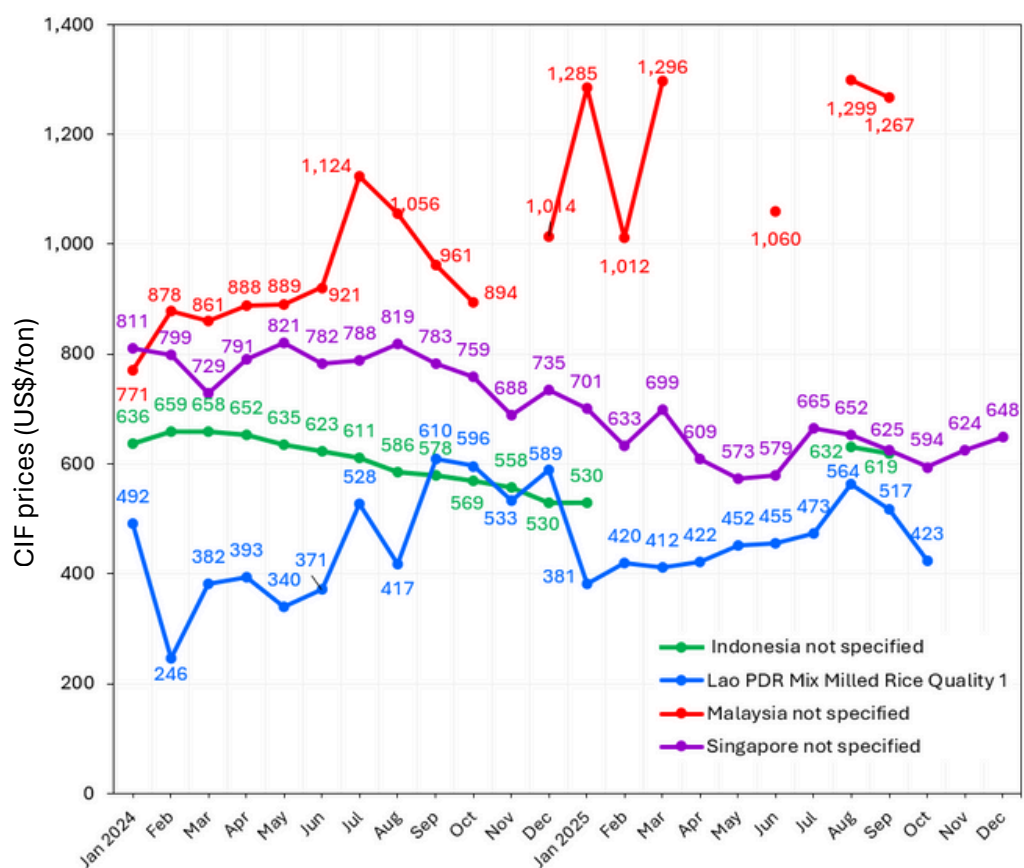


Figure 15. CIF prices (US\$/ton) of milled rice of selected countries in ASEAN from 2024 to 2025.

Maize Outlook for 2026

Highlights

The increase in ASEAN maize supply in 2026 is due to the increase in the beginning stock, import, and production. The supply is forecast to increase by 3.42 million tons (5.14 percent increases) from 66.59 million tons in 2025 to approximately 70.01 million tons in 2026 (Table 16). The forecast indicates that the beginning stock significantly increases by approximately 1.78 million tons (28.58 percent increases) from 8.25 million tons in 2025 to 10.03 million tons in 2026. The import is expected to slightly increase by 1.06 million tons (5.37 percent increases) from 19.74 million tons in 2025 to 20.80 million tons in 2026. The production is expected to increase by 0.58 million tons (1.50 percent increases) from 38.60 million tons in 2025 to 39.18 million tons in 2026.

The demand for maize in 2026 is expected to increase, attributing in the ending stock and domestic utilization. Accordingly, the ending stock is expected to increase by 2.63 million tons (26.22 percent increases) from 10.03 million tons in 2025 to 12.66 million tons in 2026. The domestic utilization is predicted to rise by 0.80 million tons (1.47 percent increases) from 54.31 million tons in 2025 to 55.11 million tons in 2026. However, the export is slightly decreased by 0.03 million tons (1.33 percent decreases) from 2.26 million tons in 2025 to 2.23 million tons in 2026.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to slightly increase by 0.01 percent from 71.08 percent in 2025 to 71.09 percent in 2026. The beginning stock to domestic utilization ratio, referred to as the food security ratio, is expected to increase by 3.01 percent from 15.18 percent in 2025 to 18.19 percent in 2026.

Table 16. Summary of the ASEAN maize situation in 2025-2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	66.59	70.01	3.42	5.14
• Beginning stock	8.25	10.03	1.78	21.58
• Production	38.60	39.18	0.58	1.50
• Import	19.74	20.80	1.06	5.37
Demand (Million tons)	66.59	70.01	3.42	5.14
• Domestic utilization	54.31	55.11	0.80	1.47
• Export	2.26	2.23	-0.03	-1.33
• Ending stock	10.03	12.66	2.63	26.22
Ratio of production to domestic utilization (%)	71.08	71.09	0.01	-
Ratio of beginning stock to domestic utilization (%)	15.18	18.19	3.01	-

ASEAN Maize Situation in 2025



Production

ASEAN maize production in 2025 (crop year 2024/2025) is at 46.42 million tons, increasing 1.77 million tons (3.96 percent increases) from 44.65 million tons in 2024 (crop year 2023/2024). Increases in maize production in 2025 are observed in Brunei Darussalam, Indonesia, Lao PDR, the Philippines, Thailand, and Vietnam due to expansions in the planted areas and yield. Meanwhile, decreases in maize production are observed in Cambodia, Malaysia, and Myanmar due to reductions in planted area, harvested area, and yield, (Tables 17–20, Figures 16–19).

For Brunei Darussalam in 2025, the increase of production is attributed to a rise in yield due to favorable weather conditions, farmers improving crop management, and applying more fertilizer.

For Indonesia in 2025, the increase in production is attributed to expansions in both planted area and yield. These increases are driven by favorable weather conditions, rising maize prices, supportive government policies, collaboration with farmers improving crop management, and the use of high-yield maize varieties, despite some areas are adversely affected by natural hazards, including floods, droughts, pest infestations, and unfavorable weather conditions.

For Lao PDR in 2025, the increase in production is attributed to an expansion in planted area driven by rising maize prices, declining prices of competing crops, and supportive government policies. Meanwhile, the decline in yield results from fertilizer deficits and natural damage, particularly during the wet season.

For Malaysia in 2025, the decrease in production is attributed to the decrease in yield.

For Myanmar in 2025, the decrease in production is attributed to declines in both planted area and yield. The reduction in planted area is influenced by rising prices of competing crops and a shift of cultivation of other crops such as oilseeds and pulses. In addition, lower yields result from fertilizer deficits and the impacts of natural disasters, including floods and heavy rainfall accompanied by sediment and sand deposition on farmland.

For Thailand in 2025, the increase in production is attributed to expansions in both planted area and yield. These increases are driven by favorable weather conditions, supportive government policies, collaboration with farmers using the high-yield maize varieties, and improving crop management.

For Vietnam in 2025, the increase in production is attributed to both planted area and yield. These increases are driven by favorable weather conditions and farmers improving crop management, despite the decrease in the planted area occurs during the first cropping cultivation.



Utilization and Stock

The maize utilization in ASEAN in 2025 is at 54.31 million tons, increasing 1.43 million tons (2.71 percent increases) compared to 52.87 million tons in 2024 (Tables 22–23). Increases in domestic utilization are observed in Brunei Darussalam, Cambodia, Indonesia, Malaysia, the Philippines, Singapore, and Thailand, despite decreases in Lao PDR, Myanmar, and Vietnam.

The beginning stock of maize in ASEAN in 2025 is at 8.25 million tons, increasing 3.53 million tons (74.81 percent increases) from 4.72 million tons in 2024 (Tables 22–23).

The ratio of maize production to domestic utilization for the entire ASEAN region in 2025 is at 71.08 percent, showing an increase from 69.77 percent in 2024 (Table 25, Figure 27).

This suggests that ASEAN as a whole produced less maize than required for regional consumption. On a country-by-country basis, Cambodia, Indonesia, Lao PDR, and Myanmar have ratios above 100 percent, indicating that they produced more maize than needed for their domestic consumption. On the other hand, Brunei Darussalam, Malaysia, the Philippines, Singapore, Thailand, and Vietnam have ratios below 100 percent, implying that these countries still needed to import maize to meet their domestic utilization needs.

The ratio of beginning stock to domestic utilization (food security ratio) for the ASEAN increases to 15.18 percent in 2025 from 8.92 percent in 2024 (Table 26, Figure 28).



Trade

In 2025, ASEAN exports 2.26 million tons of maize while importing 19.74 million tons (Table 23, Figures 20–21 and 23–24). Myanmar, the largest exporter in ASEAN, is contributed 61.27 percent of the total maize exports, amounting to 1.38 million tons (Table 23, Figures 20–21).

The primary importing countries in the region include Vietnam, Thailand, and the Philippines (AFSIS estimated), respectively (Table 23, Figures 23–24).

Detailed information regarding the quantity and value of maize exports by destination countries and the quantity and value of maize imports by origin countries could be found in Tables 27–28.



Prices

The monthly FOB prices for maize exporting countries and CIF prices for importing countries for 2024 and 2025 are shown in Tables 29–30 and Figures 29–30. Singapore is the highest CIF price, with the annual average CIF price in 2025 is 1,306 US\$ per ton. The annual average FOB price for Indonesia in 2025 is 769 US\$ per ton according to HS-code 10059091 and 100590999 (data updated as of January to September).



Damaged Area

The damaged area of maize in 2025 is to be 25,269 hectares. Of this, 8,721 hectares are caused by floods in Myanmar. Unspecified types of damages are observed in Cambodia, Malaysia, and Thailand of 13,704 hectares (Table 21).

Prospects for Maize in 2026



Production

Maize production in ASEAN in 2026 (crop year 2025/2026) is estimated at 47.72 million tons, up from 46.42 million tons in 2025. Increases are almost observed in all ASEAN countries except Cambodia and Myanmar. The largest increase in terms of quantity is recorded in Indonesia, with production rising to approximately 22.68 million tons in 2026 from 22.32 million tons in 2025 (Table 17).

For Brunei Darussalam in 2026, the production is expected to increase, influenced by favorable weather conditions, fertilizer sufficiency, and improving crop management.

For Indonesia in 2026, the production is expected to increase, attributing to expansions in both planted area and yield. These increases are driven by rising maize prices, favorable weather conditions, and supportive government policies, collaboration with farmers using the high-yield of maize varieties.

For Lao PDR in 2026, the production is expected to increase, attributing to expansions in both planted area and yield. These increases are driven by favorable weather conditions, rising maize prices, supportive government policies, and farmers using the high-yield of maize varieties, and improving crop management.

For Thailand in 2026, the production is expected to increase, attributing to expansions in both planted area and yield. These increases are driven by favorable weather conditions, rising maize prices, declining prices of competing crops, supportive government policies, collaboration with farmers using maize varieties, and improving crop management.

For Vietnam in 2026, the production is expected to increase, attributing to both planted area and yield. These increases are driven by favorable weather conditions and farmers practice of improving crop management.



Utilization and Stock

The domestic utilization of maize in ASEAN is estimated to be 55.11 million tons in 2026, up from 54.31 million tons in 2025 (Tables 23–24). The forecast for beginning stock for 2026 is 10.03 million tons, which is an increase of 1.78 million tons from 8.25 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase to 71.09 percent in 2026, up from 71.08 percent in 2025 (Table 25, Figure 27). Meanwhile, the ratio of beginning stock to domestic utilization (food security ratio) is expected to be 18.19 percent in 2026, an increase from 15.18 percent in 2025 (Table 26, Figure 28).



Trade

The maize export from ASEAN is expected to decrease to 2.23 million tons in 2026, down from 2.26 million tons in 2025. The forecast for maize imports by ASEAN in 2026 is 20.80 million tons, an increase from 19.74 million tons in 2025 (Tables 23–24, Figures 20, 22–23, and 25).

ASEAN's maize stock position improved markedly, strengthening short-term food security. Beginning stocks rose to 8.25 million tons in 2025 and are projected to increase further to 10.03 million tons in 2026. Consequently, the food security ratio improved from 8.92 percent in 2024 to 15.18 percent in 2025 and is expected to reach 18.19 percent in 2026, reflecting enhanced buffer capacity against supply disruptions.

Trade patterns confirm ASEAN's continued dependence on external supplies. In 2025, the region imported about 20.66 million tons of maize while exporting only 2.58 million tons, with Myanmar accounting for more than 60 percent of total exports. Imports are projected to rise slightly to 20.80 million tons in 2026, while exports are expected to decline.

In comparison with the global maize market, where production exceeds 1.28 billion tons and is largely balanced with utilization, ASEAN represents a relatively small share of global output and remains a net importing region. Although production growth and rising stocks have improved resilience, ASEAN's maize sector continues to face structural supply gaps, emphasizing the importance of productivity gains, trade management, and regional cooperation to enhance long-term food and feed security¹.

Reference:

1. World Agricultural Production [Internet]. United States Department of Agriculture (USDA). 2025 [cited 2025 December 24]. Available from: <https://apps.fas.usda.gov/psdonline/circulars/production.pdf>.

Table 17. Maize production in ASEAN countries from 2024 to 2026

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	44,654.25	46,423.08	1,768.83	3.96	47,722.24	1,299.16	2.80
Brunei	0.58	0.64	0.06	11.08	0.66	0.02	2.93
Cambodia ^{a/}	1,221.42	1,070.89	-150.53	-12.32	1,048.86*	-22.03	-2.06
Indonesia	20,478.69	22,321.97	1,843.28	9.00	22,679.81	357.84	1.60
Lao PDR	515.30	547.30	32.00	6.21	725.30	178.00	32.52
Malaysia	2,412.81	1,984.12	-428.69	-17.77	2,613.00*	628.88	31.70
Myanmar	2,596.62	2,465.02	-131.60	-5.07	2,351.98*	-113.04	-4.59
Philippines	8,162.27	8,211.24*	48.97	0.60	8,260.51*	49.27	0.60
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	4,864.42	5,299.00	434.58	8.93	5,519.22	220.22	4.16
Vietnam	4,402.15	4,522.90	120.75	2.74	4,522.90	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 18. Maize planted area in ASEAN countries from 2024 to 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	8,426.14	8,839.70	413.57	4.91	9,011.34	171.64	1.94
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	197.36	191.58	-5.78	-2.93	189.66*	-1.92	-1.00
Indonesia	2,561.34	2,779.47	218.14	8.52	2,789.37	9.90	0.36
Lao PDR	103.60	110.60	7.00	6.75	146.37	35.77	32.34
Malaysia	616.53	660.70	44.17	7.16	670.00*	9.30	1.41
Myanmar	649.63	627.87	-21.76	-3.35	609.25*	-18.62	-2.97
Philippines	2,430.96*	2,530.00*	99.04	4.07	2,633.07*	103.07	4.07
Singapore	0.00	0.00	0.00	#DIV/0!	0.00	0.00	#DIV/0!
Thailand	995.26	1,070.25	75.00	7.54	1,104.38	34.13	3.19
Vietnam	871.46	869.23	-2.23	-0.26	869.23	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 19. Maize harvested area in ASEAN countries from 2024 to 2026

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	8,418.50	8,669.01	250.50	2.98	8,991.65	322.64	3.72
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	196.14	186.05	-10.10	-5.15	184.19*	-1.86	-1.00
Indonesia	2,548.65	2,767.80	219.15	8.60	2,789.37	21.57	0.78
Lao PDR	103.60	110.57	6.97	6.73	146.37	35.80	32.37
Malaysia	616.53	516.10	-100.43	-16.29	670.00*	153.90	29.82
Myanmar	648.91	621.69	-27.22	-4.20	597.78*	-23.91	-3.85
Philippines	2,430.96	2,530.00*	99.04	4.07	2,633.07*	103.07	4.07
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,002.24	1,067.57	65.33	6.52	1,101.64	34.07	3.19
Vietnam	871.46	869.23	-2.23	-0.26	869.23	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 20. Maize yield in ASEAN countries from 2024 to 2026

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	5.30	5.36	0.06	1.13	5.31	-0.05	-0.93
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	6.23	5.76	-0.47	-7.54	5.69*	-0.07	-1.22
Indonesia	8.04	8.06	0.02	0.25	8.13	0.07	0.87
Lao PDR	4.97	4.95	-0.02	-0.40	4.96	0.01	0.20
Malaysia	3.91	3.84	-0.07	-1.79	3.90	0.06	1.56
Myanmar	4.00	3.97	-0.03	-0.75	3.93*	-0.04	-1.01
Philippines	3.36	3.25*	-0.11	-3.27	3.14*	-0.11	-3.38
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	4.85	4.96	0.11	2.27	5.01	0.05	1.01
Vietnam	5.05	5.20	0.15	2.97	5.20	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

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Table 21. Maize damaged area in ASEAN countries by cause of damage in 2025

Unit: Hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	8,721	2,016	792	0	13,704	36	25,269
Brunei	0	0	0	0	0	0	0
Cambodia ^{a/}	0	0	0	0	5,532	0	5,532
Indonesia	2,550	53	72	0	0	0	2,675
Lao PDR	26	0	0	0	0	0	26
Malaysia	0	0	0	0	145	0	145
Myanmar	6,145	0	0	0	0	36	6,181
Philippines	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0
Thailand	0	1,963	720	0	8,027	0	10,710
Vietnam	0	0	0	0	0	0	0

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 22. Maize balance sheet of ASEAN countries in 2024

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	4,717,601	36,888,679	21,838,250	63,444,530	52,874,540	2,323,382	8,246,607	63,444,530
Brunei	0	578	347	925	925	0	0	925
Cambodia ^{a/}	1,039,456	1,221,418	0	2,260,874	587,827	78,561	1,594,486	2,260,874
Indonesia	956,330	15,123,513	1,743,439	17,823,282	14,710,296	55,651	3,057,335	17,823,282
Lao PDR	96,077	515,300	16,096	627,474	335,388	252,083	40,002	627,474
Malaysia	0	2,413	1,673,712	1,676,125	1,673,148*	2,977	0	1,676,125
Myanmar	1,466,711	2,596,618	2,286	4,065,615	843,095	1,344,913	1,877,607	4,065,615
Philippines	432,000	8,162,270	1,784,000	10,378,270	9,591,644*	0	786,626	10,378,270
Singapore	0	0	1,715	1,715	1,614	101	0	1,715
Thailand	174,467	4,864,419	4,100,000	9,138,886	8,993,544	1,229	144,113	9,138,886
Vietnam	552,560	4,402,150	12,516,654	17,471,364	16,137,058	587,868	746,438	17,471,364

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 23. Maize balance sheet of ASEAN countries in 2025

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	8,246,607	38,604,063	19,743,241	66,593,911	54,309,035	2,257,317	10,027,558	66,593,911
Brunei	0	641	365	1,006	1,006	0	0	1,006
Cambodia ^{a/}	1,594,486	1,070,892	0	2,665,378	692,998	71,548	1,900,831	2,665,378
Indonesia	3,057,335	16,484,771	905,524	20,447,630	16,368,609	59,006	4,020,015	20,447,630
Lao PDR	40,002	547,200	17,246	604,448	333,865	254,786	15,797	604,448
Malaysia	0	1,984	1,697,682*	1,699,666	1,696,865*	2,801	0	1,699,666
Myanmar	1,877,607	2,465,429	5,005	4,348,041	831,835	1,383,043	2,133,163	4,348,041
Philippines	786,626	8,211,244*	1,794,704*	10,792,574	9,777,580*	0	1,014,994	10,792,574
Singapore	0	0	1,726	1,726	1,664	62	0	1,726
Thailand	144,113	5,299,001	3,900,000*	9,343,114	9,200,587	1,240*	141,287	9,343,114
Vietnam	746,438	4,522,900	11,420,989	16,690,327	15,404,025	484,831	801,470	16,690,327

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 24. Maize balance sheet of ASEAN countries in 2026

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	10,027,558	39,181,086	20,797,924	70,006,569	55,112,221	2,233,670	12,660,678	70,006,569
Brunei	0	661	383	1,044	1,044		0	1,044
Cambodia ^{a/}	1,900,831	1,048,863*	0	2,949,694	766,920	75,055	2,107,719	2,949,694
Indonesia	4,020,015	16,749,038	1,390,280	22,159,333	16,382,759	68,903	5,707,671	22,159,333
Lao PDR	15,797	725,300	12,280	753,377	342,500	256,783	154,094	753,377
Malaysia	0	2,613*	1,674,426*	1,677,039	1,674,168*	2,871*	0	1,677,039
Myanmar	2,133,163	2,351,978*	4,062*	4,489,203	787,898*	1,268,801*	2,432,504	4,489,203
Philippines	1,014,994	8,260,511*	1,805,472*	11,080,977	9,917,810*	0	1,163,167	11,080,977
Singapore	0	0	1,720	1,720	1,639	81	0	1,720
Thailand	141,287	5,519,223	4,000,000*	9,660,510	9,412,396*	1,240*	246,874	9,660,510
Vietnam	801,470	4,522,900	11,909,301	17,233,671	15,825,087	559,936	848,648	17,233,671

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 25. Ratio of maize production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026

Unit: Ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	36,888,678.84	52,874,540.40	69.77	38,604,062.59	54,309,034.83	71.08	39,181,086.38	55,112,221.08	71.09
Brunei	577.87	925.22	62.46	641.43	1,006.15	63.75	660.68	1,043.63	63.31
Cambodia ^{a/}	1,221,417.61	587,827.14	207.79	1,070,892.16	692,998.29	154.53	1,048,862.70	766,920.45	136.76
Indonesia	15,123,513.43	14,710,296.00	102.81	16,484,771.00	16,368,609.00	100.71	16,749,038.00	16,382,759.00	102.24
Lao PDR	515,300.00	335,388.31	153.64	547,200.00	333,865.00	163.90	725,300.00	342,500.00	211.77
Malaysia	2,413.00	1,673,148.00*	0.14	1,984.00	1,696,865.00*	0.12	2,613.00*	1,674,168.00*	0.16
Myanmar	2,596,618.00	843,095.00	307.99	2,465,429.00	831,835.00	296.38	2,351,978.00*	787,898.00*	298.51
Philippines	8,162,269.93	9,591,644.00*	85.10	8,211,244.00*	9,777,580.00*	83.98	8,260,511.00*	9,917,810.00*	83.29
Singapore	0.00	1,614.45	0.00	0.00	1,664.00	0.00	0.00	1,639.00	0.00
Thailand	4,864,419.00	8,993,544.00	54.09	5,299,001.00	9,200,587.00	57.59	5,519,223.00	9,412,396.00*	58.64
Vietnam	4,402,150.00	16,137,058.29	27.28	4,522,900.00	15,404,025.39	29.36	4,522,900.00	15,825,087.00	28.58

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 26. Ratio of maize beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026

Unit: Ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	4,717,601.49	52,874,540.40	8.92	8,246,607.22	54,309,034.83	15.18	10,027,558.29	55,112,221.08	18.19
Brunei	0.00	925.22	0.00	0.00	1,006.15	0.00	0.00	1,043.63	0.00
Cambodia ^{a/}	1,039,456.00	587,827.14	176.83	1,594,485.88	692,998.29	230.09	1,900,831.34	766,920.45	247.85
Indonesia	956,330.00	14,710,296.00	6.50	3,057,335.19	16,368,609.00	18.68	4,020,015.19	16,382,759.00	24.54
Lao PDR	96,077.44	335,388.31	28.65	40,002.45	333,865.00	11.98	15,797.45	342,500.00	4.61
Malaysia	0.00	1,673,148.00*	0.00	0.00	1,696,865.00*	0.00	0.00	1,674,168.00*	0.00
Myanmar	1,466,711.00	843,095.00	173.97	1,877,607.00	831,835.00	225.72	2,133,163.00	787,898.00*	270.74
Philippines	432,000.00	9,591,644.00*	4.50	786,625.93	9,777,580.00*	8.05	1,014,993.93	9,917,810.00*	10.23
Singapore	0.00	1,614.45	0.00	0.00	1,664.00	0.00	0.00	1,639.00	0.00
Thailand	174,467.00	8,993,544.00	1.94	144,113.00	9,200,587.00	1.57	141,287.00	9,412,396.00*	1.50
Vietnam	552,560.05	16,137,058.29	3.42	746,437.76	15,404,025.39	4.85	801,470.37	15,825,087.00	5.06

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 27. Quantity and value of maize exports by countries of destination in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	Thailand	30,798	8,623,440	51,330	14,372,400	-	-	51,330	14,372,400
	Vietnam	20,532	5,748,960						
Indonesia	Malaysia	89	86,301	7,056	3,712,994	196	696,752	7,251	4,409,746
	Philippines	6,000	1,674,834						
	Singapore	529	443,835						
	Thailand	327	1,109,004						
	Vietnam	111	399,021						
Lao PDR	Thailand	143,491	23,662,300	235,654	43,783,400	19,132	6,318,400	254,786	50,101,800
	Vietnam	92,163	20,121,100						
Malaysia	Cambodia	6	8,385	2,774	853,725	27	38,074	2,801	891,799
	Indonesia	259	86,051						
	Philippines	20	12,310						
	Singapore	82	66,294						
	Thailand	2,407	680,686						
Myanmar	Philippines	76,194	19,295,000	1,319,537	343,490,000	63,506	16,056,000	1,383,043	359,546,000
	Singapore	115	30,000						
	Thailand	1,238,228	322,825,000						
	Vietnam	5,000	1,340,000						
Philippines	Indonesia	27	106,232	470	2,177,859	67	117,252	537	2,295,111
	Vietnam	443	2,071,627						
Singapore	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	216.00	6,311	216	6,311
Vietnam	Cambodia	-	25,544,370	-	144,574,381	-	2,223,993	-	146,798,375
	Lao PDR	-	2,733,350						
	Singapore	-	1,958						
	Philippines	-	116,294,704						

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 28. Quantity and value of maize imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	0.001	29	172	1,051,755	754,160	191,085,328	754,333	192,137,083
	Philippines	39	152,378						
	Thailand	133	899,348						
Lao PDR	Thailand	6,123	1,575,213	11,817	3,373,164	5,429	1,023,523	17,246	4,396,687
	Vietnam	5,695	1,797,950						
Malaysia	Indonesia	172	68,943	3,568	1,567,410	863,597	254,477,080	867,165	256,044,490
	Singapore	4	7,234						
	Thailand	3,393	1,491,233						
Myanmar	Thailand	4,546	18,851,000	4,546	18,851,000	459	1,794,100	5,005	20,645,100
Philippines	Indonesia	6,002	1,692,519	525,070	169,082,960	63,183	21,013,062	588,253	190,096,022
	Myanmar	163,914	43,836,688						
	Thailand	323	3,950,240						
	Vietnam	354,831	119,603,513						
Singapore	Indonesia	695	1,173,726	1,089	2,053,649	667	2,692,821	1,756	4,746,470
	Malaysia	338	740,439						
	Myanmar	30	7,799						
	Philippines	2	2,696						
	Thailand	23	128,475						
	Vietnam	0.31	512						
Thailand	Cambodia	11,376	3,685,851	1,456,403	426,250,207	0	0	1,456,403	426,250,207
	Lao PDR	206,208	54,274,420						
	Myanmar	1,238,819	368,289,936						
Vietnam	Cambodia	79,220	18,009,960	142,167	45,959,698	9,375,324	2,330,682,880	9,517,491	2,376,642,578
	Lao PDR	54,292	12,227,054						
	Myanmar	5,000	1,340,000						
	Thailand	3,655	14,382,684						

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 29. FOB prices of maize in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia ^{a/}	Not specified	2024	305	305	304	304	250	240	230	250	257	240	257	280	269
		2025	240	276	240	250	238	239	-	-	-	-	-	-	247
Indonesia	HS-code 10059091 and 100590999	2024	829	500	677	1,168	664	835	279	276	814	754	813	840	704
		2025	529	835	892	837	936	288	826	939	839	-	-	-	769
Lao PDR	Grade B	2024	283	180	173	201	179	129	186	249	120	254	257	275	207
		2025	229	253	187	195	194	157	148	159	192	246	-	-	196
Malaysia	- HS-code 1005100000	2024	300	2,363	349	231	1,945	2,172	1,274	4,769	899	1,372	2,090	305	1,506
		2025	327	434	756	363	0	0	354	329	387	-	-	-	422
	- HS-code 1103130000	2024	749	629	741	423	1,019	306	315	308	316	381	755	373	526
		2025	395	383	839	842	856	294	296	312	337	-	-	-	506
Myanmar	Not specified	2024	245	241	230	225	225	235	251	261	267	254	258	260	246
		2025	262	262	262	258	255	259	260	260	248	-	-	-	258
Thailand	Not specified	2024	299	294	291	281	296	336	348	354	336	303	293	314	312
		2025	318	320	318	316	332	339	318	318	322	305	307	-	319

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 30. CIF prices of maize 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 10059091 and 10059099	2024	271	290	275	260	249	235	247	242	238	238	238	240	252
		2025	-	252	259	250	261	264	258	235	232	-	-	-	251
Lao PDR	Grade A	2024	298	321	384	313	500	312	401	297	385	302	242	317	339
		2025	267	387	271	266	363	276	319	264	277	319	-	-	301
Malaysia	- HS-code 1005100000	2024	252	257	275	250	251	233	266	262	259	230	229	247	251
		2025	340	265	276	323	302	258	248	221	381	-	-	-	290
	- HS-code 1103130000	2024	415	403	370	580	426	287	349	345	498	475	568	471	432
Myanmar	Not specified	2025	486	542	497	511	552	478	434	454	491	-	-	-	494
		2024	-	459	302	377	402	469	545	708	393	399	386	395	440
		2025	424	410	397	437	367	240	463	141	739	-	-	-	402
Singapore	Not specified	2024	1,469	1,130	1,222	1,281	912	1,115	1,271	1,122	1,335	1,202	1,763	1,347	1,264
		2025	1,632	1,701	1,113	1,273	1,357	1,094	971	1,101	1,056	1,703	1,364	1,301	1,306
Vietnam	Not specified	2024	255	255	248	253	247	243	241	240	233	233	239	244	244
		2025	250	259	266	262	262	260	254	246	234	235	-	-	253

Remark: - is noted that the value is **Not Applicable**.

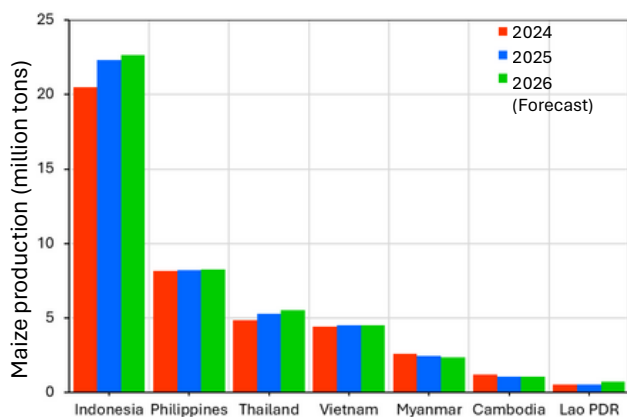


Figure 16. Maize production of selected countries in ASEAN from 2024 to 2026.

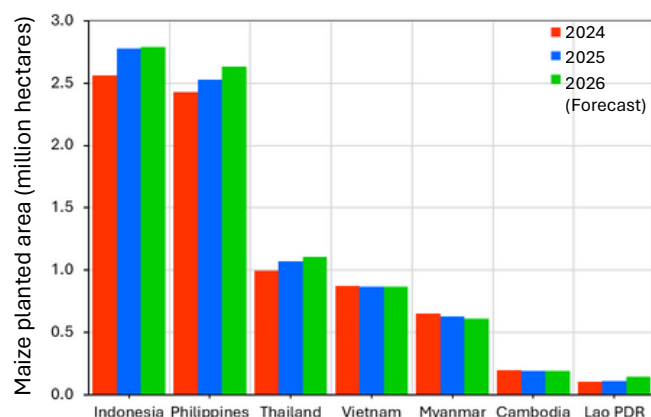


Figure 17. Maize planted area of selected countries in ASEAN from 2024 to 2026.

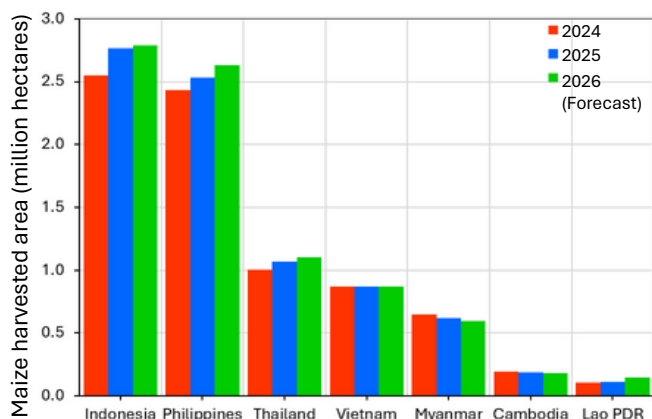


Figure 18. Maize harvested area of selected countries in ASEAN from 2024 to 2026.

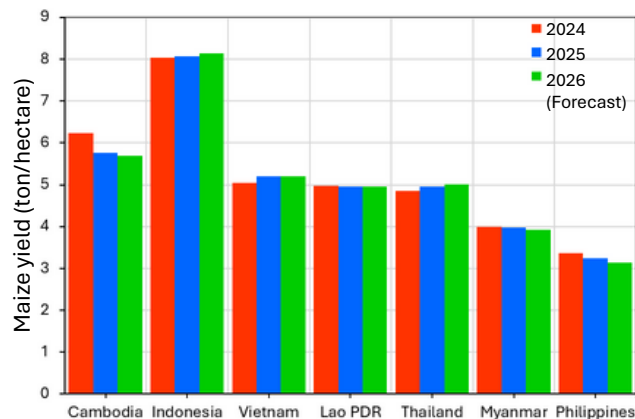


Figure 19. Maize yield of selected countries in ASEAN from 2024 to 2026.

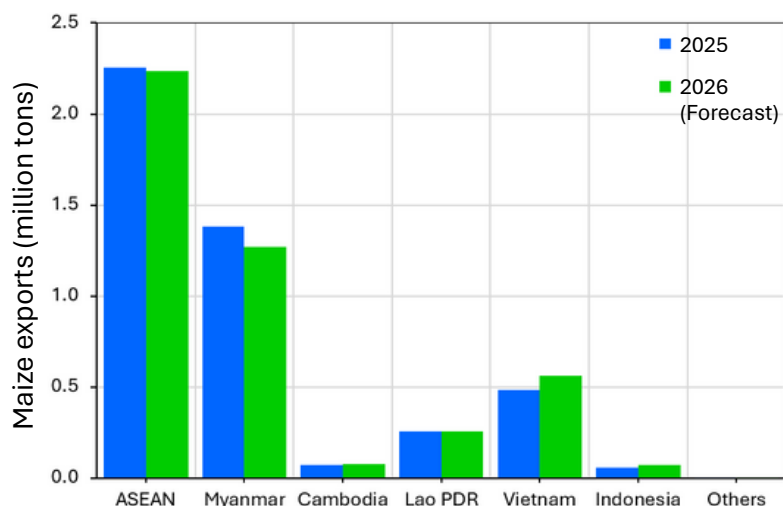


Figure 20. Amount of maize exports of selected countries in ASEAN from 2025 to 2026.

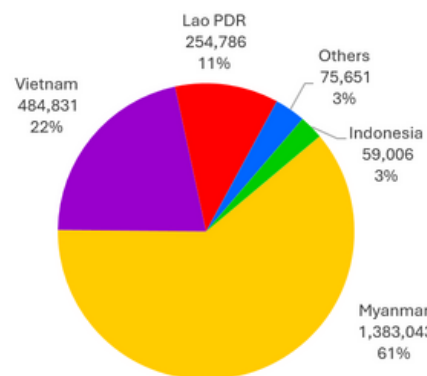


Figure 21. Share of maize exports (tons) among ASEAN countries in 2025, totaling 2.26 million tons.

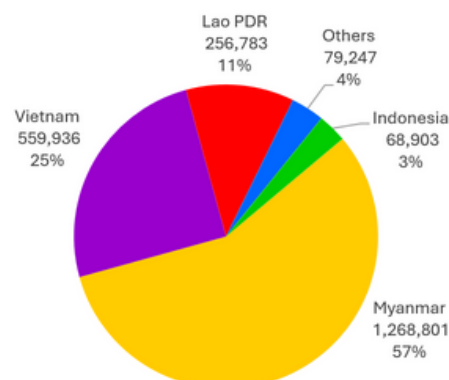


Figure 22. Share of maize exports (tons) among ASEAN countries in 2026, totaling 2.23 million tons.

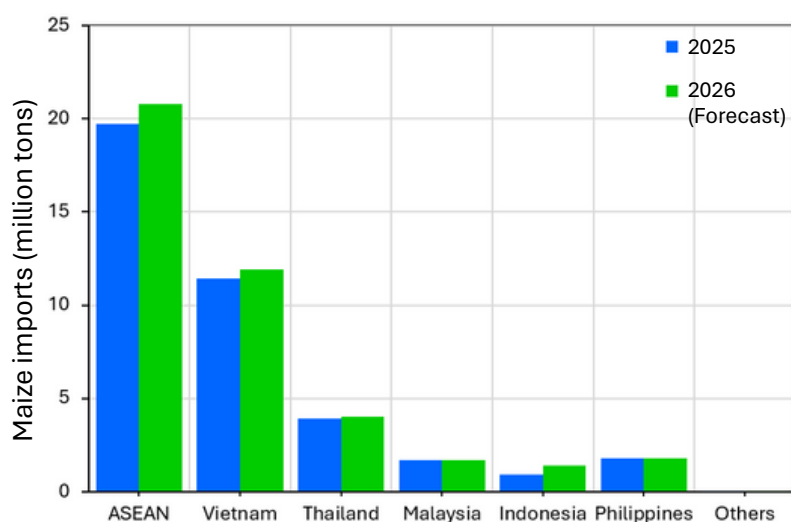


Figure 23. Amount of maize imports of selected countries in ASEAN from 2025 to 2026.

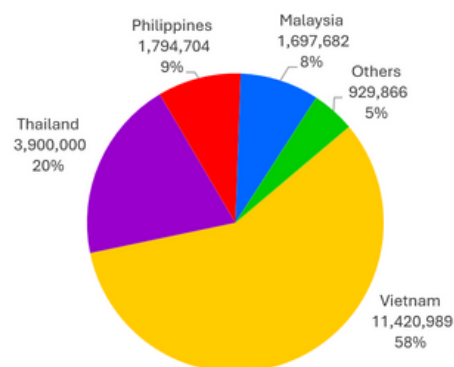


Figure 24. Share of maize imports (tons) among ASEAN countries in 2025, totaling 19.74 million tons.

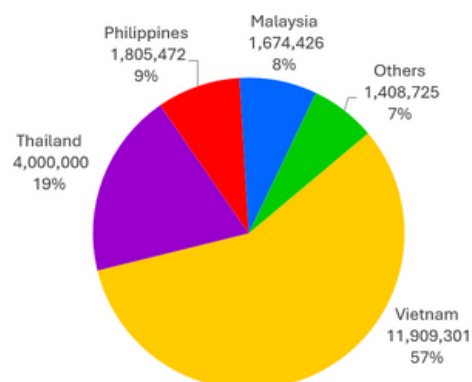


Figure 25. Share of maize imports (tons) among ASEAN countries in 2026, totaling 20.80 million tons.

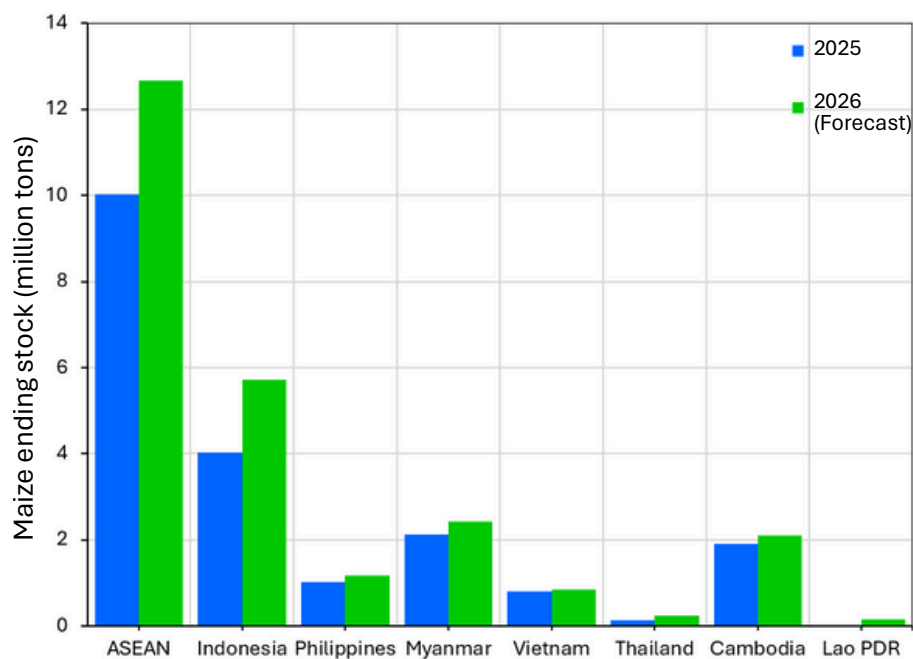


Figure 26. Amount of ending stock of maize in ASEAN from 2025 to 2026.

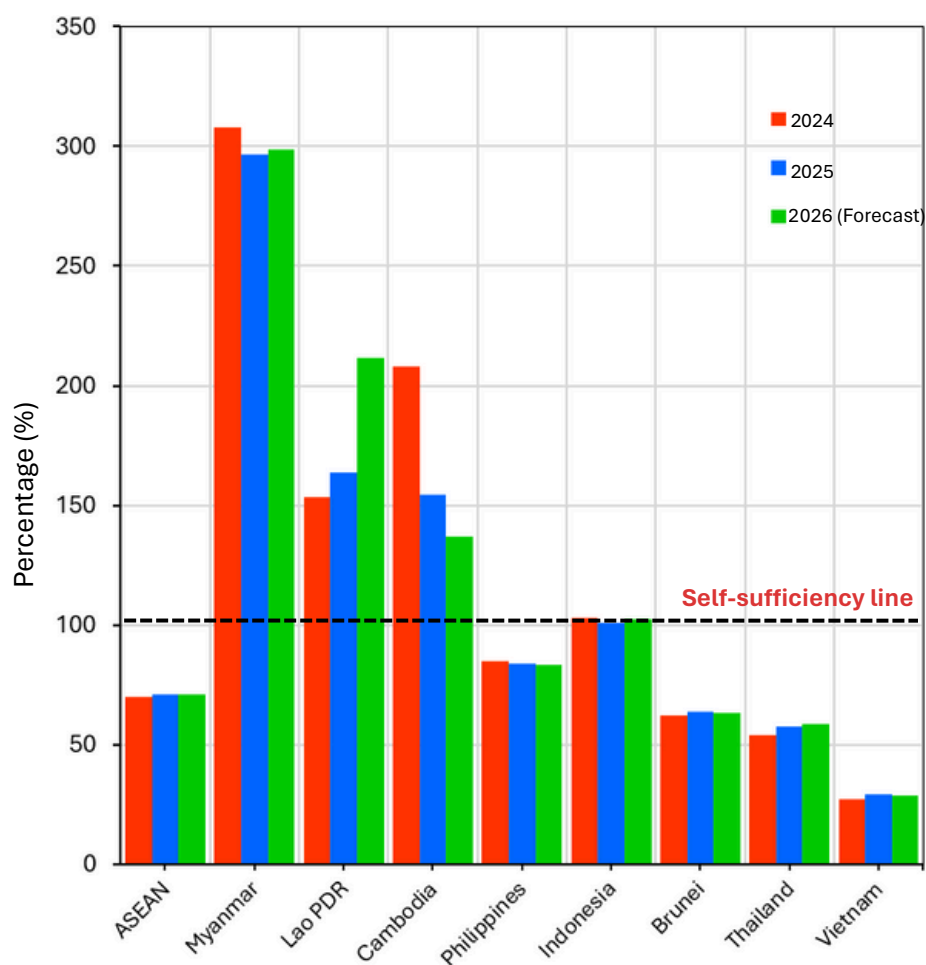


Figure 27. Ratio of maize production to domestic utilization in ASEAN from 2024 to 2026.

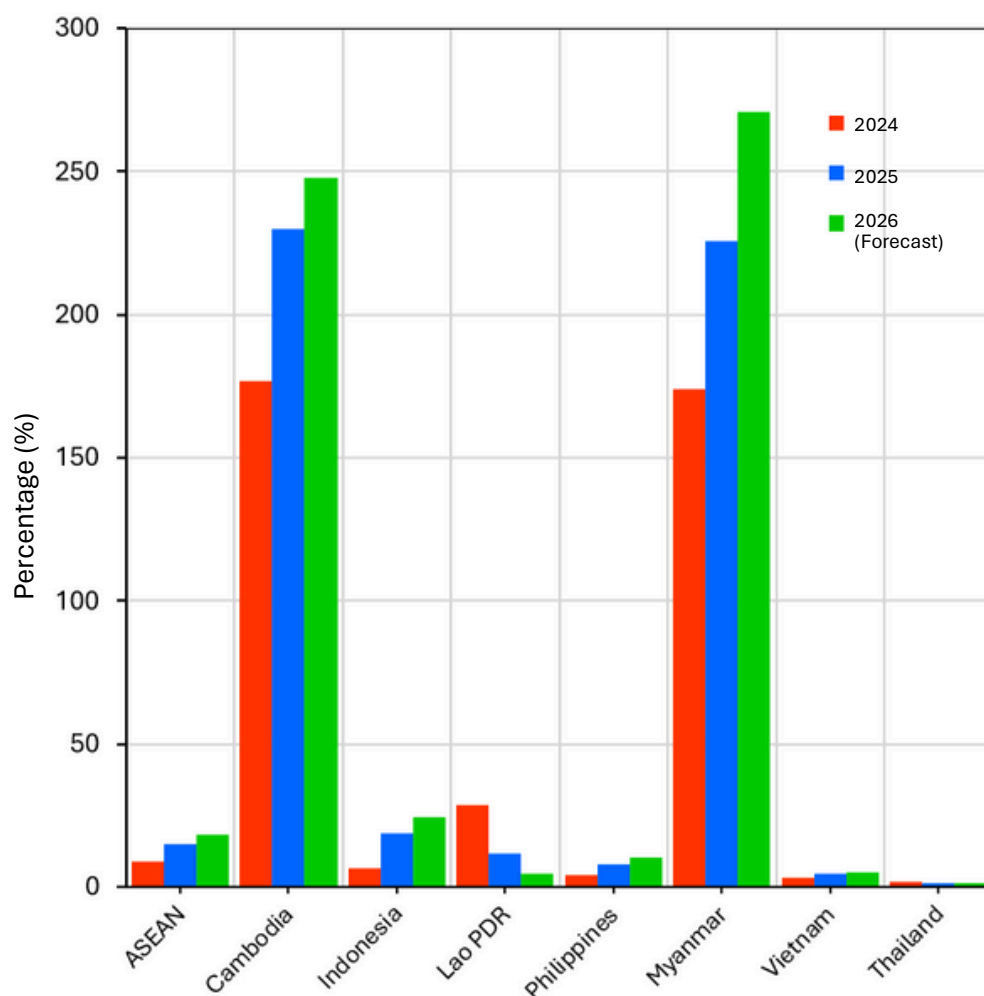


Figure 28. Ratio of maize beginning stock to domestic utilization in ASEAN from 2024 to 2026.

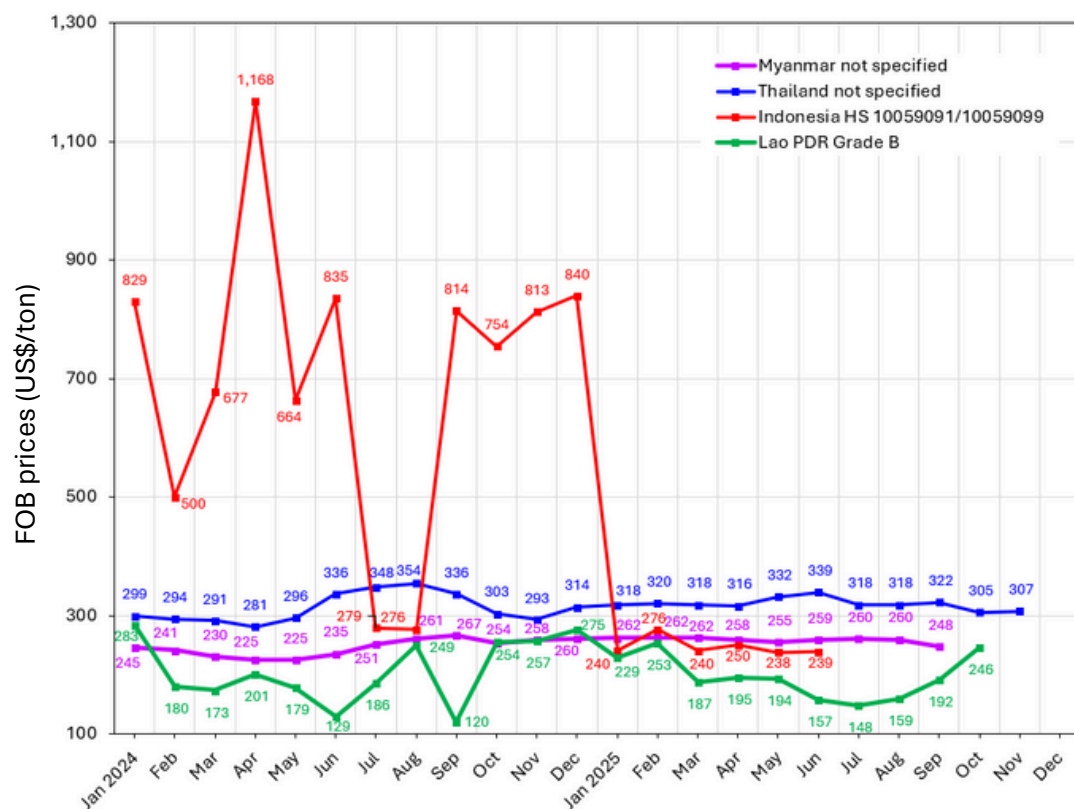


Figure 29. FOB prices (US\$/ton) of maize of selected countries in ASEAN from 2024 to 2025.

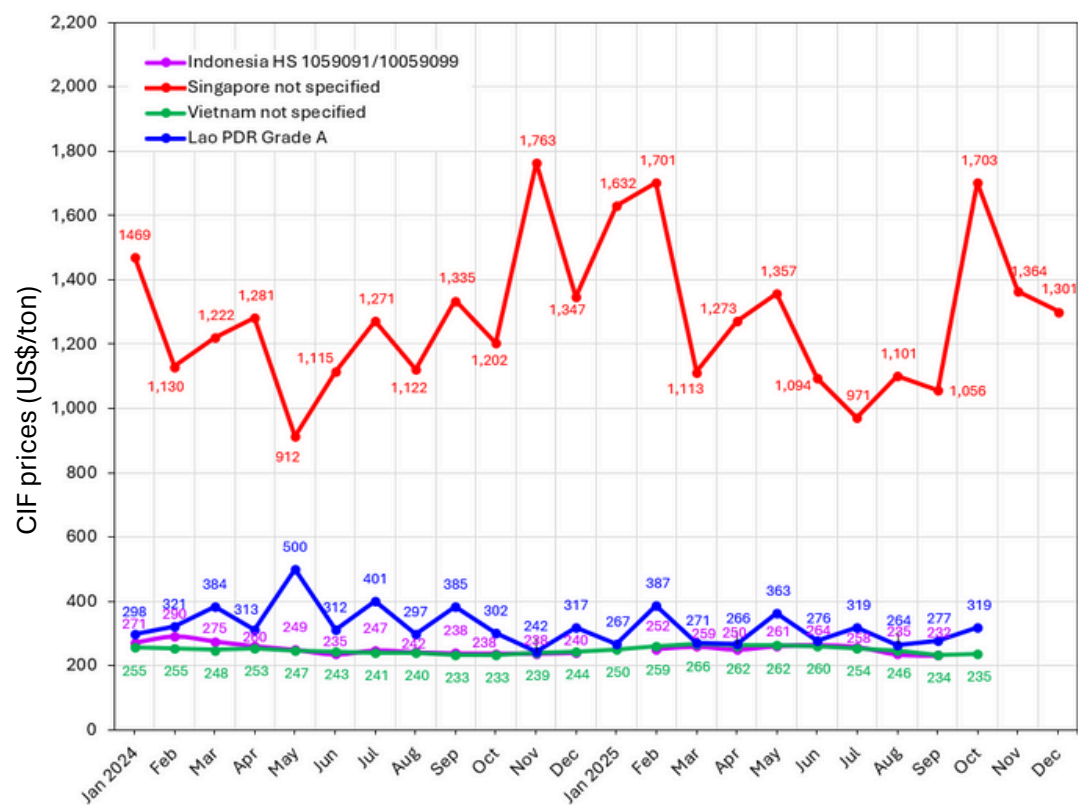


Figure 30. CIF prices (US\$/ton) of maize of selected countries in ASEAN from 2024 to 2025.

Sugarcane Outlook for 2026

Highlights

ASEAN sugar supply is forecast to increase by approximately 2.54 million tons (5.80 percent increases) from 43.77 million tons in 2025 to 46.31 million tons in 2026, attributing to the increase in beginning stock, production, and import (Table 31).

The beginning stock of sugar is forecast to increase by 1.84 million tons (10.42 percent increases) from 17.66 million tons in 2025 to 19.50 million tons in 2026. The sugar production is forecast to slightly increase by 0.03 million tons (0.17 percent increases) from 17.52 million tons in 2025 to 17.55 million tons in 2026. The sugar import in 2026 is forecast to increase by approximately 0.67 million tons (7.80 percent increases) from 8.59 million tons in 2025 to 9.26 million tons in 2026.

ASEAN sugar demand is forecast to increase, attributing to the domestic utilization, export and ending stock. The domestic utilization of sugar from ASEAN in 2026 is expected to increase by 0.30 million tons (1.80 percent increases) from 16.64 million tons in 2025 to 16.94 million tons 2026. The sugar export is forecast to increase by 0.58 million tons (7.60 percent increases) from 7.63 million tons in 2025 to 8.21 million tons in 2026. The ending stock is forecast to rise by 1.66 million tons (8.51 percent increases) from 19.50 million tons in 2025 to 21.16 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2026 is forecast to be 103.59 percent, which decreases from 105.30 percent in 2025.

The beginning stock to domestic utilization ratio (food security ratio) in 2026 is forecast to be 115.10 percent, which increases from 106.41 percent in 2025.

Table 31. Summary of the ASEAN sugar situation from 2025 to 2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	43.77	46.31	2.54	5.80
• Beginning stock	17.66	19.50	1.84	10.42
• Production	17.52	17.55	0.03	0.17
• Import	8.59	9.26	0.67	7.80
Demand (Million tons)	43.77	46.31	2.54	5.80
• Domestic utilization	16.64	16.94	0.30	1.80
• Export	7.63	8.21	0.58	7.60
• Ending stock	19.50	21.16	1.66	8.51
Ratio of production to domestic utilization (%)	105.30	103.59	-1.71	-
Ratio of beginning stock to domestic utilization (%)	106.14	115.10	8.96	-

ASEAN Sugarcane Situation in 2025



Production

The sugarcane production in ASEAN for 2025 (crop year 2024/2025) is at 188.63 million tons, representing an increase of 22.40 million tons (13.48 percent increases) compared to 166.23 million tons in 2024 (crop year 2023/2024) (Table 32, Figure 31). The countries that show an increase in production include Brunei Darussalam, Indonesia, Lao PDR, the Philippines, Thailand, and Vietnam. However, productions decrease in Cambodia and Myanmar, which are resulted by the reduction in harvested area and yield.

For Brunei Darussalam in 2025, the increase in the production is driven by favorable weather conditions, farmers applying more fertilizer, and improving crop management. However, information on the planted area, harvested area, and yield are not available. Sugarcane production is relatively small in this country. Therefore, the country relies on imports to supply its sugar requirements.

For Cambodia in 2025, the decrease in the production is attributed to reductions in both harvested area and yield. Although the increase in planted area is driven by the rising sugarcane prices and the declining prices of competing crops, the natural damage affects to harvested area to dramatically drop, contributing to decrease in cassava production.

For Indonesia in 2025, the increase in production is attributed to expansions in both planted area and yield. The increase in planted area is driven by favorable weather conditions and supportive government policies. The increase in yield is influenced by favorable weather conditions and farmers improving crop management.

For Lao PDR in 2025, the increase in production is due to the expansion in planted area. The increase in planted area is driven by rising sugarcane prices and supportive government policies. Meanwhile, the yield is decreased due to fertilizer deficits.

For Myanmar in 2025, the decrease in production is attributed to the decrease in both planted area and yield. The decrease in planted area is affected by the declining sugarcane prices. Additionally, the yield is also decreased due to natural damage, particularly floods.

For Thailand in 2025, the increase in production is attributed to both planted area and yield. The increase in planted areas is influenced by rising sugarcane prices and supportive government policies.

For Vietnam in 2025, the increase in production is attributed to the increase in planted area. The increase in planted area is driven by favorable weather conditions. However, yield is unchanged.



Utilization and Stock

The domestic utilization of sugar in ASEAN decreases by 0.13 million tons (0.75 percent decreases) from 16.77 million tons in 2024 to 16.64 million tons in 2025 (Tables 37–38). The beginning stock of sugar in ASEAN increases by 3.61 million tons (25.71 percent increases) from 14.05 million tons in 2024 to 17.66 million tons in 2025. The ending stock of sugar in ASEAN increases by 1.84 million tons (10.69 percent increases) from 17.66 million tons in 2024 to 19.50 million tons in 2025.

The ratio of sugar production to domestic utilization (self-sufficiency ratio) in 2025 increases to 105.30 percent, compared to 94.25 percent in 2024. This indicates that ASEAN produced adequate sugar for regional consumption (Table 40, Figure 42). Moreover, on a country-by-country basis, sugar productions in Cambodia, Lao PDR, Myanmar, and Thailand exceed the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (food security ratio) in 2025 is 106.14 percent, compared to 83.80 percent in 2024. This indicates that sugar availability in the region increases from the previous year (Table 41, Figure 43).



Trade

ASEAN's sugar exports increase in 2025 by 2.10 million tons (38.00 percent increases) from 5.53 million tons in 2024 to 7.63 million tons (Tables 37–38, Figures 35–36). In terms of imports, ASEAN as a whole imports approximately 8.59 million tons of sugar in 2025, showing a decrease from 10.11 million tons in 2024 (Tables 37–38, Figures 37–38).

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 from 2024 to 2025 are presented in Tables 44–45. Thailand is the primary of exporter in ASEAN countries for raw sugar. The average of Thailand's FOB prices in 2025 for raw sugar is amounted of 436 US\$ per ton (January–September).



Damaged Area

The damaged area of sugarcane in 2025 is 218,452 hectares. Of this, 36 hectares are caused by floods, particularly in Myanmar. Unspecified types of damages are observed in Cambodia and Thailand of 218,416 hectares (Table 36).

Prospects for Sugarcane in 2026



Production

Sugarcane production in ASEAN is forecast to decrease by 1.50 million tons (0.79 percent decreases) from 187.13 million tons in 2025 to 188.63 million tons in 2026 (Tables 32–35, Figures 31–34). The sugarcane production trends for 2026 in ASEAN countries depict a mixed scenario. In Cambodia, Indonesia, Thailand, and Vietnam are expected to increase in sugarcane production. On the other hand, Lao PDR, Myanmar, and the Philippines (AFSIS forecast) are expected to decrease in sugarcane production. Thailand is the largest sugar-producing country in the region, which is forecast to increase its production from 95.78 million tons in 2025 to 96.47 million tons in 2026.

For Brunei Darussalam in 2026, the production is expected to increase due to favorable weather conditions, fertilizer sufficiency, and improving crop management.

For Indonesia in 2026, the production is expected to increase due to the increase in planted area due to favorable weather conditions and supportive government policies.

For Lao PDR in 2026, the production is expected to decrease attributing to the decrease in planted area and yield. These decrease are due to government policies and fertilizer sufficiency.

For Thailand in 2026, the production is expected to increase attributing to the expansion in planted areas. The increase is driven by rising sugar prices, declining prices of competing crops, and favorable weather conditions. Meanwhile, yield is expected to decrease influenced by higher-than-average rainfall contributing to plant growth inhibition.

For Vietnam in 2026, the production is expected to increase due to the expansion in planted areas. The increase is driven by favorable weather conditions. However, yield is expected to remain similar to the previous year.



Utilization and Stock

The domestic utilization of sugar in ASEAN is forecast to increase from 16.64 million tons in 2025 to 16.94 million tons in 2026, reflecting an increase of 0.30 million tons (1.81 percent increases) (Tables 38–39). The beginning stock in ASEAN is estimated at 19.50 million tons of sugar in 2026, increasing 1.84 million tons (10.40 percent increases) from 17.66 million tons in 2025.

The ending stock of sugar in ASEAN is forecast to reach 21.16 million tons in 2026, increasing 1.66 million tons (8.51 percent increases) from around 19.50 million tons in 2025.

The ratio of production to domestic utilization in 2026 is forecast to be 103.59 percent, down from 105.30 percent in 2025 (Table 40, Figure 42).

The ratio of the beginning stock to domestic utilization in 2026 is forecast to be 115.10 percent, a decrease from 106.14 percent in 2025 (Table 41, Figure 43).



Trade

The export is predicted to increase from 7.63 million tons in 2025 to 8.21 million tons in 2026 (Tables 38–39, Figures 35–37). The import is expected to be 9.26 million tons in 2026, an increase from 8.59 million tons in 2025 (Tables 38–39, Figures 38–40).

ASEAN sugar supply is projected to rise to 46.31 million tons in 2026, up 4.44 percent from 2025, driven mainly by higher beginning stocks, increased imports, and marginal growth in production. Demand is also expected to expand, reflecting higher domestic utilization, exports, and ending stocks, with ending stock reaching 21.16 million tons. Although the self-sufficiency ratio slightly declines to 103.59 percent in 2026, sugar availability remains adequate, supported by a stronger food security ratio of 115.10 percent. Meanwhile, sugarcane production showed strong growth in 2025 due to expanded area and yields in several ASEAN countries, but is forecast to slightly ease in 2026 amid mixed country-level trends, with Thailand continuing as the region's largest producer.

Compared with the global sugar market, ASEAN shows a modest but strategically important role, with a stronger focus on regional self-sufficiency rather than dominating world trade. Globally, sugar production and trade are highly concentrated, led by Brazil and India, which together account for a large share of production, exports, and sugarcane output^{1–5}, while Thailand is the only ASEAN country among the top global exporters. In contrast, ASEAN's sugar market is characterized by rising stocks, stable production, and adequate supply for domestic consumption, as reflected in self-sufficiency ratios above 100 percent and improving food security ratios. While the global market is expected to face a production deficit and tightening trade due to lower exportable supplies from major producers^{2–3,5}, ASEAN's outlook remains relatively stable, supported by increased beginning stocks, moderate growth in utilization, and Thailand's expanding production, positioning the region as a reliable contributor amid global market volatility³.

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3. OECD-FAO agricultural outlook 2025-2034 [Internet]. Organization for Economic Co-operation and Development (OECD). 2024 [cited 2025 December 25]. Available from: <https://www.oecd.org/en/publications/oecd-fao-agricultural-outlook-2025-2034>.
4. Sugarcane market size, share, growth, and industry analysis, by type (raw sugarcane, processed sugarcane), by application (agriculture, food & beverage, bioenergy), regional insights and forecast to 2033 [Internet]. Market Growth Reports. 2025 [cited 2025 December 25]. Available from: <https://www.marketgrowthreports.com/market-reports/sugarcane-market>.
5. The global sugarcane industry: Market size, growth & challenges [Internet]. AgriSpark. 2025 [cited 2025 December 25]. Available from: <https://www.linkedin.com/pulse/global-sugarcane-industry-market-size-growth-challenges-shstra>.

Table 32. Sugarcane production in ASEAN countries from 2024 to 2026.

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	166,226.58	188,631.06	22,404.47	13.48	187,134.49	-1,496.57	-0.79
Brunei	0.06	0.08	0.03	46.88	0.09	0.00	5.00
Cambodia ^{a/}	2,039.64	1,621.11	-418.53	-20.52	1,914.84	293.74	18.12
Indonesia	33,216.61	39,069.97	5,853.36	17.62	39,095.94	25.97	0.07
Lao PDR	1,643.60	1,723.00	79.40	4.83	1,600.00	-123.00	-7.14
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	11,592.61	11,537.09	-55.51	-0.48	11,481.84*	-55.25	-0.48
Philippines	20,564.71	25,972.78	5,408.07	26.30	23,382.26*	-2,590.52	-9.97
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	84,494.75	95,778.93	11,284.18	13.35	96,472.85*	693.92	0.72
Vietnam	12,674.60	12,928.09	253.49	2.00	13,186.65	258.56	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 33. Sugarcane planted area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	3,134.43	3,266.07	131.64	4.20	3,229.92	-36.15	-1.11
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	45.25	64.65	19.39	42.85	66.58	1.94	3.00
Indonesia	520.82	563.36	42.53	8.17	563.73	0.38	0.07
Lao PDR	33.30	35.00	1.70	5.11	33.00	-2.00	-5.71
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	170.27	169.68	-0.59	-0.35	169.09*	-0.59	-0.35
Philippines	399.22	458.38	59.16	14.82	412.97*	-45.41	-9.91
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,780.08	1,785.81	5.73	0.32	1,791.57*	5.75	0.32
Vietnam	185.48	189.19	3.71	2.00	192.98	3.78	2.00

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 34. Sugarcane harvested area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	2,878.40	3,045.62	167.22	5.81	3,027.38	-18.24	-0.60
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	45.15	36.36	-8.78	-19.45	45.23	8.87	24.38
Indonesia	520.82	563.36	42.53	8.17	563.73	0.38	0.07
Lao PDR	33.30	33.00	-0.30	-0.90	33.00	0.00	0.00
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	165.28	169.65	4.37	2.64	169.09*	-0.55	-0.33
Philippines	399.22	458.38	59.16	14.82	412.97*	-45.41	-9.91
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,529.15	1,595.68	66.52	4.35	1,610.38*	14.70	0.92
Vietnam	185.48	189.19	3.71	2.00	192.98	3.78	2.00

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 35. Sugarcane yield in ASEAN countries from 2024 to 2026.

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	57.75	61.94	4.19	7.26	61.81	-0.13	-0.21
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	45.18	44.58	-0.60	-1.33	42.34	-2.24	-5.02
Indonesia	63.78	69.35	5.57	8.73	69.35	0.00	0.00
Lao PDR	49.36	52.21	2.85	5.77	48.48	-3.73	-7.14
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	70.14	68.01	-2.13	-3.04	67.90*	-0.11	-0.16
Philippines	51.51	56.66	5.15	10.00	56.62*	-0.04	-0.07
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	55.26	60.02	4.76	8.61	59.91*	-0.11	-0.18
Vietnam	68.33	68.33	0.00	0.00	68.33	0.00	0.00

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Table 36. Sugarcane damaged area in ASEAN countries by cause of damage in 2025.

Unit: Hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	36	0	0	0	0	218,416	218,452
Brunei	0	0	0	0	0	0	0
Cambodia ^{a/}	0	0	0	0	0	28,281	28,281
Indonesia	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0
Myanmar	36	0	0	0	0	0	36
Philippines	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0
Thailand	0	0	0	0	0	190,135	190,135
Vietnam	0	0	0	0	0	0	0

Remark: - refers to data that is **Not Applicable**.

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Table 37. Sugar balance sheet of ASEAN countries in 2024.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	14,050,062	15,802,008	10,106,727	39,958,797	16,766,501	5,529,610	17,662,686	39,958,797
Brunei	1,587	0	4,200	5,787	5,245	0	542	5,787
Cambodia ^{a/}	0	203,964	0	203,964	130,696	73,268*	0	203,964
Indonesia	953,525	2,456,515	5,313,529	8,723,569	7,094,932	240,409	1,388,228	8,723,569
Lao PDR	195,799	328,720	376,276	900,795	268,968	449,156	182,670	900,795
Malaysia	0	0	2,390,312	2,390,312	2,146,604*	243,709	0	2,390,312
Myanmar	215,607	926,713	78,000	1,220,320	727,760	13,485	479,075	1,220,320
Philippines	561,881	1,561,155	228,666	2,351,702	1,809,722	24,179	517,801	2,351,702
Singapore	0	0	202,850	202,850	129,695	73,155	0	202,850
Thailand	11,356,227	9,057,481*	453,581	20,867,289	2,470,000	4,194,031	14,203,258	20,867,289
Vietnam	765,436	1,267,460	1,059,313	3,092,209	1,982,880	218,218	891,111	3,092,209

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Table 38. Sugar balance sheet of ASEAN countries in 2025.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	17,662,686	17,522,482	8,586,484	43,771,652	16,640,682	7,630,799	19,500,171	43,771,652
Brunei	542	0	5,040	5,582	5,226	0	356	5,582
Cambodia ^{a/}	0	162,111	0	162,111	136,666	25,445*	0	162,111
Indonesia	1,388,228	2,668,075	4,486,656	8,542,959	6,983,763	121,873	1,437,323	8,542,959
Lao PDR	182,670	344,600	287,183	814,453	253,070	474,282	87,101	814,453
Malaysia	0	0	2,138,922*	2,138,922	1,920,752*	218,170*	0	2,138,922
Myanmar	479,075	922,275	70,000*	1,471,350	662,427*	1,846	807,077	1,471,350
Philippines	517,801	1,643,753	362,981	2,524,535	2,200,000*	66,085	258,450	2,524,535
Singapore	0	0	197,480	197,480	116,003	81,477	0	197,480
Thailand	14,203,258	10,488,859*	345,000*	25,037,117	2,360,066	6,490,000	16,187,051	25,037,117
Vietnam	891,111	1,292,809	693,222	2,877,142	2,002,709	151,621	722,812	2,877,142

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 39. Sugar balance sheet of ASEAN countries in 2026.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	19,500,171	17,548,709	9,257,604	46,306,485	16,941,274	8,205,619	21,159,591	46,306,485
Brunei	356	0	5,544	5,900	5,155	0	745	5,900
Cambodia ^{a/}	0	191,484	0	191,484	137,681	53,803*	0	191,484
Indonesia	1,437,323	2,720,129	4,956,547	9,113,999	7,082,725	181,385	1,849,889	9,113,999
Lao PDR	87,101	320,000	290,129	697,230	245,000	430,767	21,463	697,230
Malaysia	0	0	2,146,827*	2,146,827	1,927,851*	218,976*	0	2,146,827
Myanmar	807,077	917,859*	70,000*	1,794,936	939,277*	2,252*	853,407	1,794,936
Philippines	258,450	1,627,405*	424,000*	2,309,855	2,000,000*	66,000*	243,855	2,309,855
Singapore	0	0	200,165	200,165	122,849	77,316	0	200,165
Thailand	16,187,051	10,453,167*	260,000*	26,900,218	2,458,000	7,000,000*	17,442,218	26,900,218
Vietnam	722,812	1,318,665	904,392	2,945,869	2,022,736	175,120	748,013	2,945,869

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 40. Ratio of sugar production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	15,802,007.88	16,766,501.31	94.25	17,522,481.95	16,640,682.00	105.30	17,548,709.47	16,941,274.00	103.59
Brunei	0.00	5,244.60	0.00	0.00	5,226.00	0.00	0.00	5,155.00	0.00
Cambodia ^{a/}	203,963.80	130,696.00	156.06	162,110.74	136,666.00	118.62	191,484.47	137,681.00	139.08
Indonesia	2,456,515.00	7,094,932.00	34.62	2,668,075.00	6,983,763.00	38.20	2,720,129.00	7,082,725.00	38.41
Lao PDR	328,720.00	268,968.18*	122.22	344,600.00	253,070.00	136.17	320,000.00	245,000.00	130.61
Malaysia	0.00	2,146,603.55	0.00	0.00	1,920,752.00*	0.00	0.00	1,927,851.00*	0.00
Myanmar	926,713.08	727,760.00	127.34	922,275.21	662,427.00*	139.23	917,859.00*	939,277.00*	97.72
Philippines	1,561,155.00	1,809,722.00	86.26	1,643,753.00	2,200,000.00*	74.72	1,627,405.00*	2,000,000.00*	81.37
Singapore	0.00	129,694.99	0.00	0.00	116,003.00	0.00	0.00	122,849.00	0.00
Thailand	9,057,481.00	2,470,000.00*	366.70	10,488,859.00	2,360,066.00	444.43	10,453,167.00*	2,458,000.00	425.27
Vietnam	1,267,460.00	1,982,880.00	63.92	1,292,809.00	2,002,709.00	64.55	1,318,665.00	2,022,736.00	65.19

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 41. Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	14,050,061.65	16,766,501.31	83.80	17,662,685.84	16,640,682.00	106.14	19,500,171.06	16,941,274.00	115.10
Brunei	1,586.50	5,244.60	30.25	541.90	5,226.00	10.37	355.90	5,155.00	6.90
Cambodia ^{a/}	0.00	130,696.00	0.00	0.00	136,666.00	0.00	0.00	137,681.00	0.00
Indonesia	953,525.00	7,094,932.00	13.44	1,388,228.00	6,983,763.00	19.88	1,437,323.00	7,082,725.00	20.29
Lao PDR	195,799.00	268,968.18*	72.80	182,670.17	253,070.00	72.18	87,101.17	245,000.00	35.55
Malaysia	0.00	2,146,603.55	0.00	0.00	1,920,752.00*	0.00	0.00	1,927,851.00*	0.00
Myanmar	215,607.00	727,760.00	29.63	479,075.08	662,427.00*	72.32	807,077.30	939,277.00*	85.93
Philippines	561,881.00	1,809,722.00	31.05	517,801.20	2,200,000.00*	23.54	258,450.20	2,000,000.00*	12.92
Singapore	0.00	129,694.99	0.00	0.00	116,003.00	0.00	0.00	122,849.00	0.00
Thailand	11,356,227.00	2,470,000.00*	459.77	14,203,258.00	2,360,066.00	601.82	16,187,051.00	2,458,000.00	658.55
Vietnam	765,436.15	1,982,880.00	38.60	891,111.49	2,002,709.00	44.50	722,812.49	2,022,736.00	35.73

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 42. Quantity and value of sugar exports by countries of destination in 2025.

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	Vietnam	6,138	196,419	6,138	196,419	2,001,600	64,051,200	2,007,738	64,247,619
Indonesia	Brunei	6	7,759	7,036	4,313,215	12,074	8,846,673	19,109	13,159,888
	Cambodia	0.10	201						
	Malaysia	3,525	2,205,908						
	Philippines	212	125,104						
	Singapore	3,262	1,948,909						
	Thailand	1	1,232						
	Vietnam	30	24,103						
Lao PDR	Vietnam	327,196	162,573,521	327,196	162,573,521	147,086	53,860,794	474,282	216,434,315
Malaysia	Brunei	3	2,801	74,078	40,859,508	52,497	30,508,222	126,575	71,367,730
	Cambodia	636	376,488						
	Indonesia	28,360	15,953,079						
	Myanmar	4,000	1,877,443						
	Philippines	8,773	4,723,164						
	Singapore	21,317	12,448,592						
	Thailand	44	77,306						
	Vietnam	10,945	5,400,635						
Myanmar	-	-	-	-	-	1,846	74,000	1,846	74,000
Philippines	-	-	-	-	-	66,085	43,451,594	66,085	43,451,594
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	5,066	3,649,981	3,696,258	1,754,811,056	1,708,907	858,520,635	5,405,165	2,613,331,690
	Cambodia	681,479	357,919,935						
	Indonesia	1,589,404	708,813,863						
	Lao PDR	345,029	177,732,516						
	Malaysia	187,903	101,986,988						
	Myanmar	75,042	52,362,014						
	Philippines	530,577	201,907,712						
	Singapore	84,711	50,291,223						
	Vietnam	197,046	100,146,822						
Vietnam	Brunei	-	35,931	-	65,192,854	-	162,195,057	-	227,387,912
	Cambodia	-	7,815,881						
	Indonesia	-	11,576,736						
	Lao PDR	-	1,290,897						
	Malaysia	-	9,428,632						
	Philippines	-	20,135,060						
	Singapore	-	1,869,152						
	Thailand	-	13,040,565						

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 43. Quantity and value of sugar imports by countries of origin in 2025.

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	Thailand	5,040	-	5,040	-	-	-	5,040	-
Cambodia ^{a/}	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	26,500	14,767,829	1,521,718	765,517,000	1,617,253	783,981,087	3,138,971	1,549,498,087
	Singapore	1	567						
	Thailand	1,485,217	745,448,604						
	Vietnam	10,000	5,300,000						
Lao PDR	Thailand	283,100	132,987,761	285,200	133,907,658	1,983	903,297	287,183	134,810,955
	Vietnam	2,100	919,897						
Malaysia	Philippines	9	27,092	156,322	91,325,133	1,152,928	586,737,228	1,309,250	678,062,361
	Indonesia	5,373	2,637,898						
	Singapore	2,043	1,303,646						
	Thailand	146,768	86,206,385						
	Vietnam	2,129	1,150,112						
Myanmar	-	-	-	-	-	-	-	-	-
Philippines	Indonesia	800	467,860	362,981	196,682,075	0	0	362,981	196,682,075
	Malaysia	7,098	3,595,388						
	Thailand	355,084	192,618,828						
Singapore	Indonesia	4,214	7,165,525	138,895	215,266,540	58,586	73,719,881	197,480	288,986,421
	Malaysia	26,587	44,419,180						
	Myanmar	27	14,585						
	Philippines	2	28,079						
	Thailand	106,334	161,184,743						
	Vietnam	1,730	2,454,427						
Thailand	Cambodia	289	745,864	116,000	118,452,646	355,175	283,467,303	350,437	237,603,640
	Indonesia	22,529	60,644,626						
	Lao PDR	33,226	3,675,824						
	Malaysia	3,931	9,910,109						
	Myanmar	2,432	960,210						
	Philippines	1,664	9,012,976						
	Singapore	1,163	3,861,082						
	Vietnam	50,765	29,641,954						
Vietnam	Cambodia	-	43,272,275	-	251,012,235	-	249,330,513	-	500,342,748
	Indonesia	-	9,054,851						
	Lao PDR	-	40,908,590						
	Malaysia	-	10,446,075						
	Myanmar	-	27,253,500						
	Philippines	-	10,359,726						
	Singapore	-	5,187,485						
	Thailand	-	104,529,734						

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 44. FOB prices 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
Cambodia ^{a/}	Raw sugar	2024	34	35	33	34	36	37	36	38	40	45	45	43	38
		2025	33	34	32	33	34	37	-	-	-	-	-	-	34
Indonesia	Raw sugar	2024	2,453	2,296	2,264	2,949	3,519	1,955	959	1,325	1,566	1,843	1,365	1,334	1,986
		2025	885	1,485	1,077	1,696	1,030	1,156	1,644	1,498	735	-	-	-	1,245
	White sugar	2024	1,827	204	1,812	2,013	1,730	1,518	1,345	1,630	1,656	1,989	2,109	997	1,569
		2025	1,873	1,458	1,845	1,475	878	1,824	1,616	1,265	1,539	-	-	-	1,530
Lao PDR	White sugar grade A	2024	584	566	542	589	563	525	539	589	555	564	565	510	558
		2025	616	530	586	538	542	550	547	517	542	567	-	-	553
Malaysia	- HS-code 1701910000	2024	971	1,011	1,138	856	840	677	1,047	1,537	1,262	970	1,044	1,151	1,042
		2025	637	855	950	1,071	1,121	1,115	1,023	800	886	-	-	-	940
	- HS-code 1701991000	2024	721	721	708	703	712	671	688	699	689	605	622	612	679
		2025	641	604	608	618	605	592	574	561	550	-	-	-	595
	- HS-code 1701999000	2024	4	4	3	6	5	5	3	3	4	3	3	4	4
		2025	6	3	2	2	2	2	5	5	4	-	-	-	4
	- HS-code 1701130000	2024	0	0	0	0	0	0	0	0	0	0	0	0	0
		2025	0	0	0	0	0	0	0	0	382	-	-	-	382
	- HS-code 1701140000	2024	618	579	589	567	559	528	566	552	558	514	555	554	562
		2025	555	548	511	531	531	486	466	461	452	-	-	-	505
	Not specified	2024	40	40	40	0	0	0	0	0	0	0	0	0	40
		2025	0	0	62	40	0	0	0	0	0	-	-	-	51
Philippines	MUSCOVADO	2024	1,799	1,931	2,195	1,903	2,010	2,004	2,268	2,286	2,212	2,148	2,684	2,232	2,139
		2025	2,441	2,484	2,409	2,504	2,064	1,983	2,272	2,559	2,303	2,470	2,003	-	2,317
	MOLASSES	2024	187	182	219	207	246	214	223	223	204	202	181	186	206
		2025	190	163	180	140	158	164	156	155	135	132	140	-	156
Thailand	Raw sugar	2024	508	530	552	524	501	503	511	493	525	525	481	514	514
		2025	451	467	452	441	458	462	405	398	390	-	-	-	436
	White sugar	2024	659	673	668	634	633	620	609	621	609	603	588	592	626
		2025	544	534	549	544	529	511	520	480	497	-	-	-	523

Remark: - refers to data that is **Not Applicable**.

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Table 45. CIF prices 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	Raw sugar	2024	610	613	612	599	577	578	550	522	518	524	525	554	565
		2025	511	522	518	520	498	480	468	462	459	-	-	-	493
	White sugar	2024	793	810	811	803	818	818	818	2,714	33,500	48,833	57,667	45,000	16,115
		2025	3,248	11,000	6,818	12,838	17,750	3,250	67,929	89	20,000	-	-	-	15,880
Lao PDR	White sugar	2024	499	499	490	452	476	499	490	490	480	464	459	461	480
		2025	475	500	493	496	495	498	503	495	465	-	-	-	491
Malaysia	- HS-code 1701910000	2024	648	659	1,900	740	725	1,210	1,126	2,159	1,618	1,148	858	1,752	1,212
		2025	1,602	1,654	1,663	1,367	1,879	1,692	1,535	1,757	1,545	-	-	-	1,633
	- HS-code 1701991000	2024	703	694	692	720	648	584	626	648	635	584	598	603	645
		2025	615	570	580	573	571	566	528	523	506	-	-	-	559
Singapore	Not specified	2024	6	9	3	8	9	5	7	3	4	5	6	3	6
		2025	5	4	1	2	4	1	5	1	1	-	-	-	2
		2024	771	762	762	750	745	722	710	700	650	650	659	687	714
		2025	643	630	620	614	580	575	557	565	535	550	552	321	562

Remark: - refers to data that is **Not Applicable**.

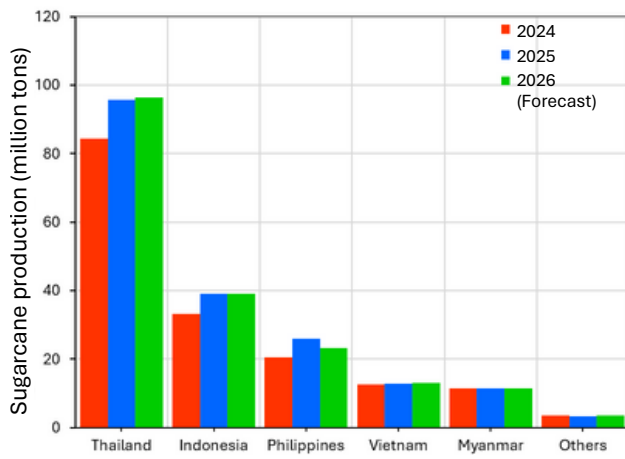


Figure 31. Sugarcane production of selected countries in ASEAN from 2024 to 2026.

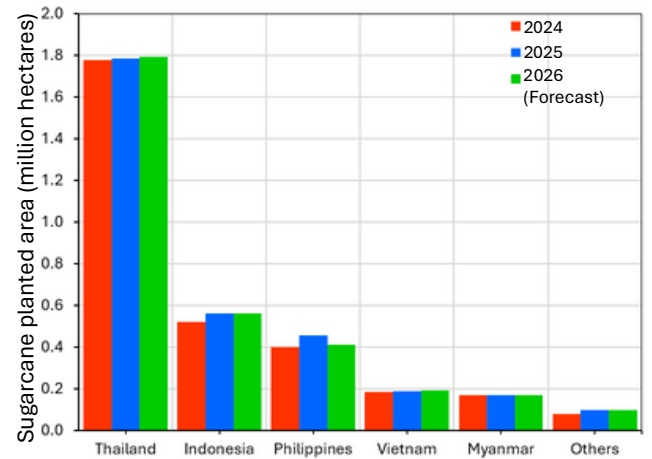


Figure 32. Sugarcane planted area of selected countries in ASEAN from 2024 to 2026.

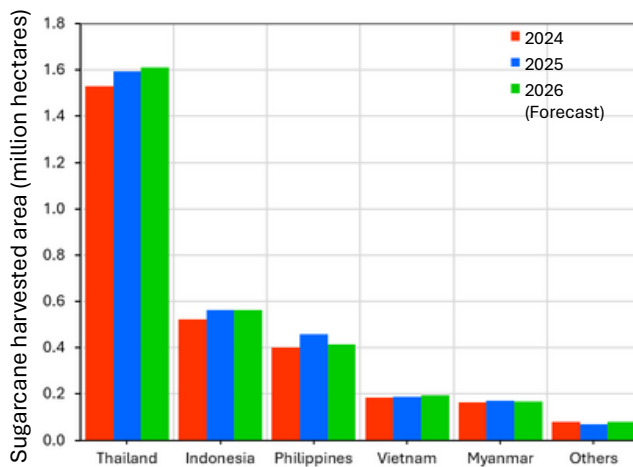


Figure 33. Sugarcane harvested area of selected countries in ASEAN from 2024 to 2026.

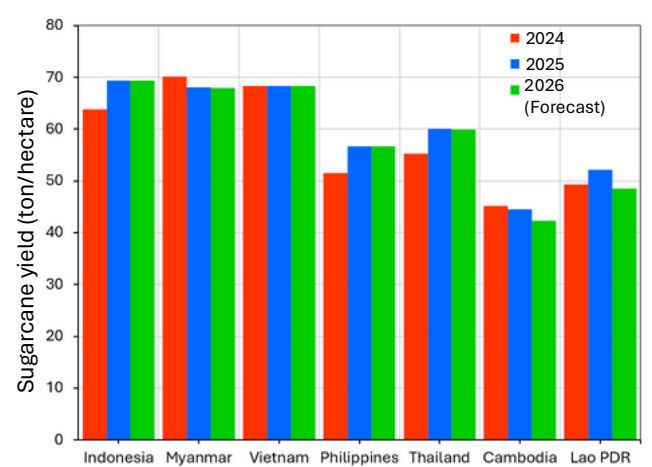


Figure 34. Sugarcane yield of selected countries in ASEAN from 2024 to 2026.

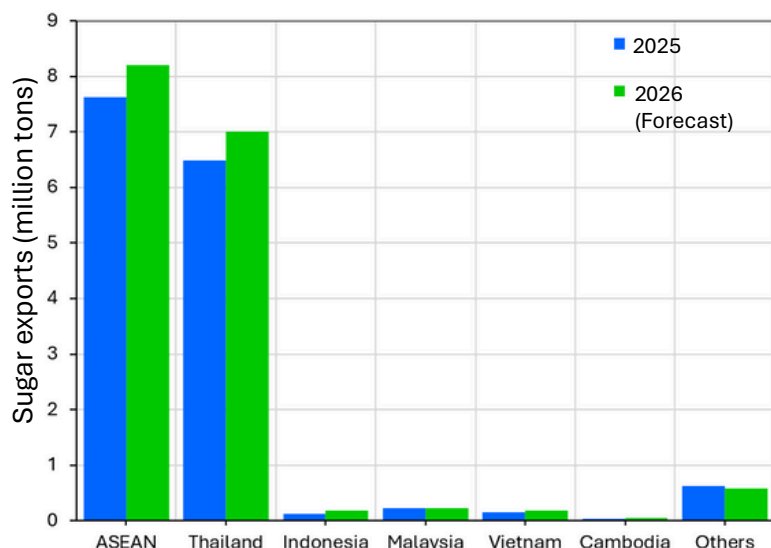


Figure 35. Amount of sugar exports of selected countries in ASEAN from 2025 to 2026.

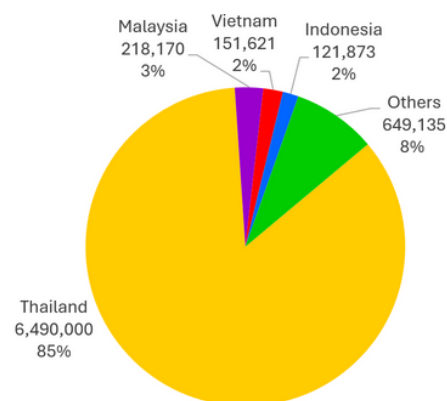


Figure 36. Share of sugar exports (tons) among ASEAN countries in 2025, totaling 7.63 million tons.

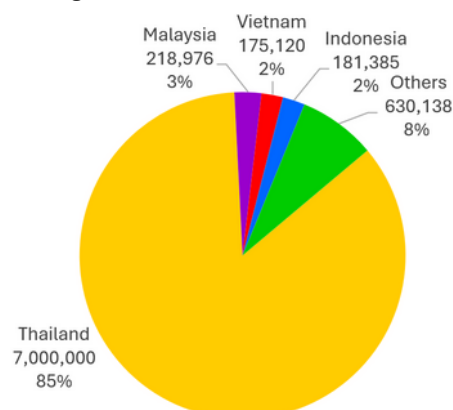


Figure 37. Share of sugar exports (tons) among ASEAN countries in 2026, totaling 8.21 million tons.

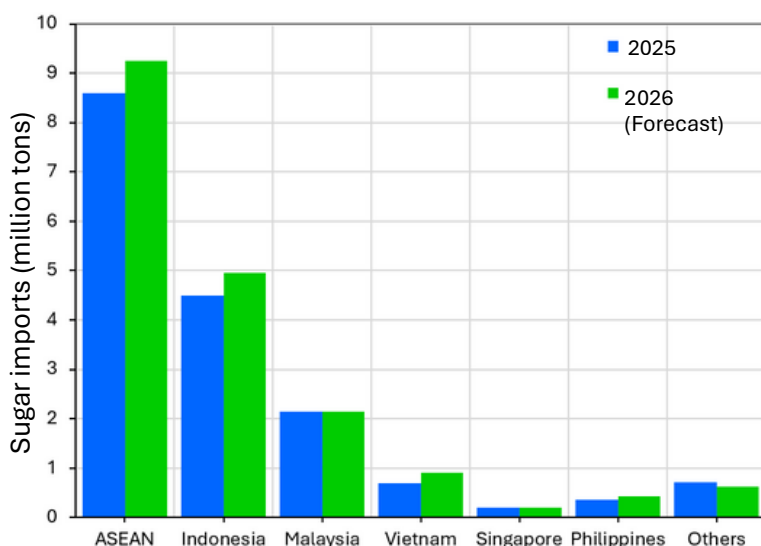


Figure 38. Amount of sugar imports of selected countries in ASEAN from 2025 to 2026.

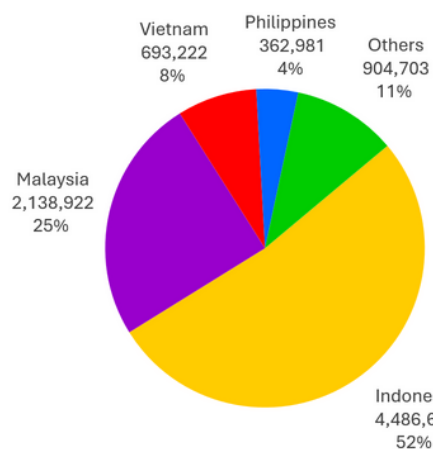


Figure 39. Share of sugar imports (tons) among ASEAN countries in 2025, totaling 8.59 million tons.

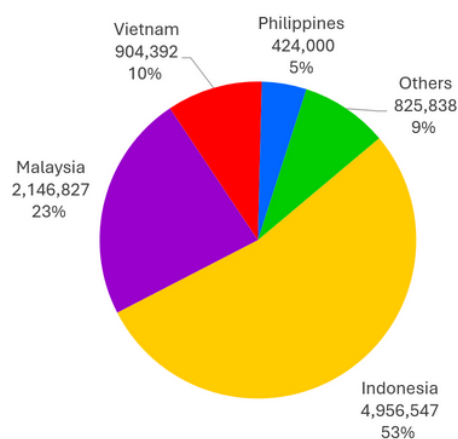


Figure 40. Share of sugar imports (tons) among ASEAN countries in 2026, totaling 9.26 million tons.

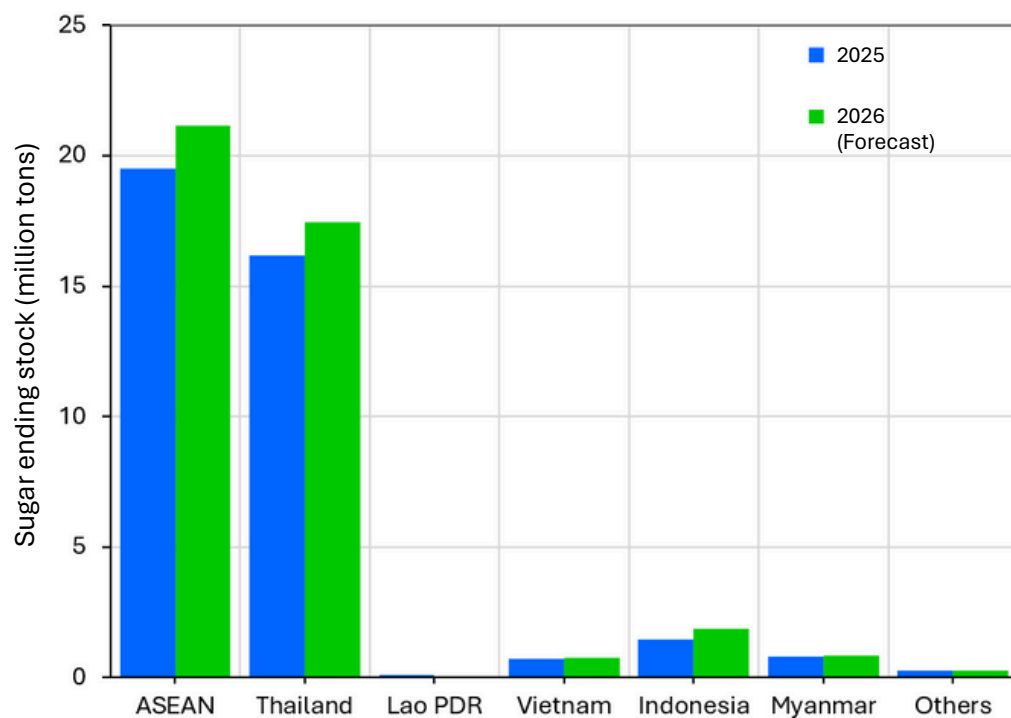


Figure 41. Amount of ending stock of sugar in ASEAN from 2025 to 2026.

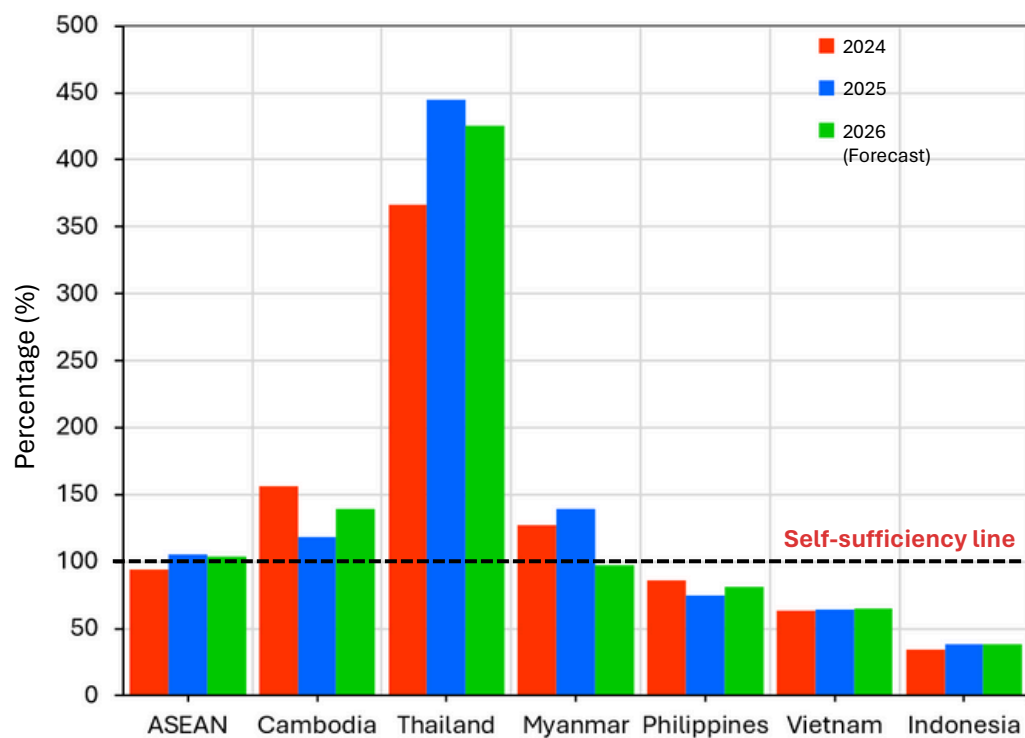


Figure 42. Ratio of sugar production to domestic utilization in ASEAN from 2024 to 2026.

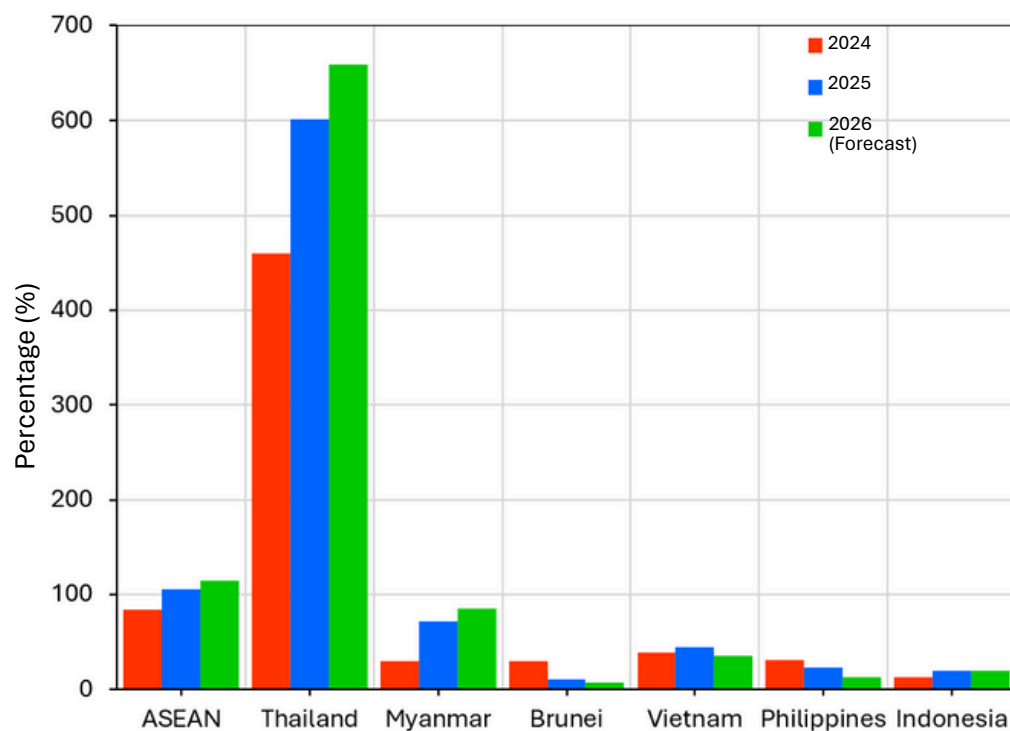


Figure 43. Ratio of sugar beginning stock to domestic utilization in ASEAN from 2024 to 2026.

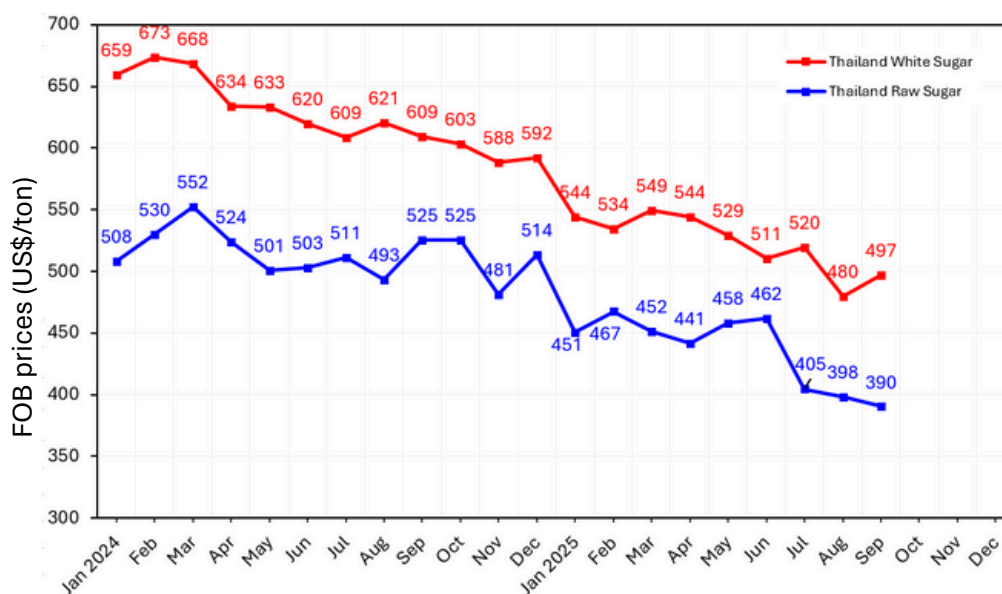


Figure 44. FOB prices (US\$/ton) of sugar of selected countries in ASEAN from 2024 to 2025.

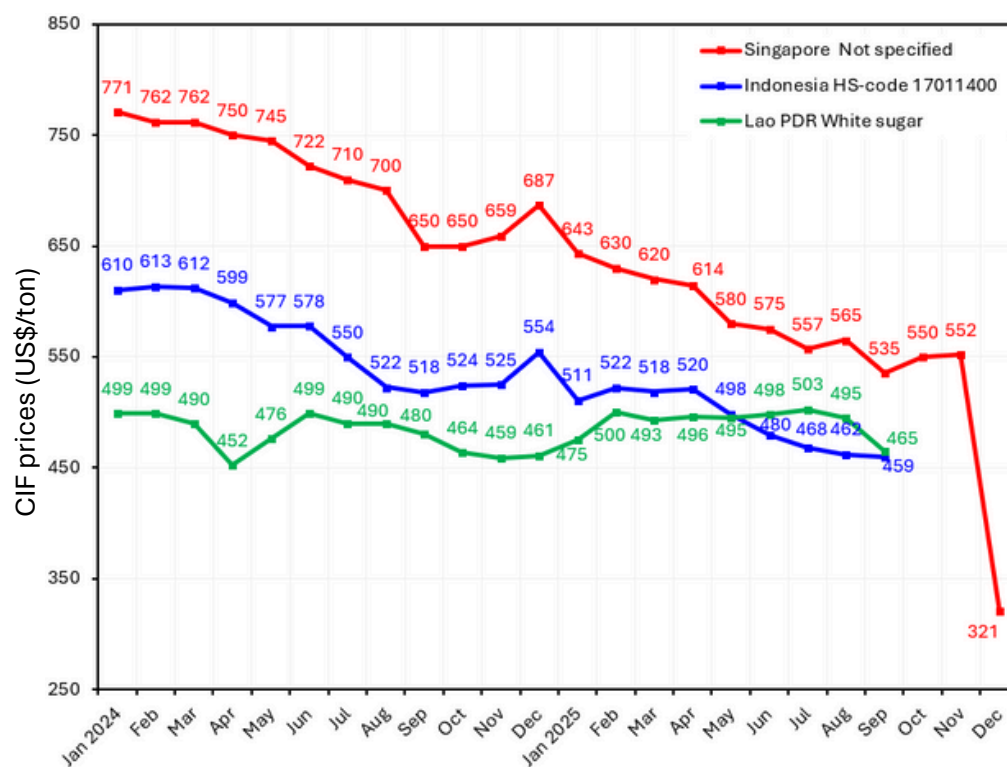


Figure 45. CIF prices (US\$/ton) of sugar of selected countries in ASEAN from 2024 to 2025.

Soybean Outlook for 2026

Highlights

The forecast for the supply of soybeans in ASEAN indicates an increase from 11.12 million tons in 2025 to 11.52 million tons in 2026, reflecting an increase of 0.40 million tons (3.60 percent increases) (Table 46). This growth in the soybean supply is driven by increases in both production and import. Soybean production for 2025 is forecast to increase by 0.02 million tons (3.23 percent increases), reflecting an increase of 0.62 million tons in 2025 to 0.64 million tons in 2026. The soybean import is forecast to increase by 0.44 million tons (4.40 percent increases) from 9.99 million tons in 2025 to 10.43 million tons in 2026. Meanwhile, the beginning stock is estimated to decrease to 0.45 million tons in 2026, down 0.06 million tons (11.76 percent decreases) from 0.41 million tons in 2025.

Increases in soybean demand are attributed to domestic utilization and ending stock. The domestic utilization is forecast to increase by 0.28 million tons (2.66 percent increases) from 10.53 million tons in 2025 to 10.81 million tons in 2026. Exports are forecast to remain 0.14 million tons from the previous year. The ending stock is forecast to significantly increase by 0.11 million tons (24.44 percent increases) from 0.45 million tons in 2025 to 0.56 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) in 2026 is forecast to be 5.88 percent, a decrease from 5.89 percent in 2025. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 4.17 percent in 2026, a decrease from 4.84 percent in 2025.

Table 46. Summary of the ASEAN soybean situation from 2025 to 2026

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	11.12	11.52	0.40	3.60
• Beginning stock	0.51	0.45	-0.06	-11.76
• Production	0.62	0.64	0.02	3.23
• Import	9.99	10.43	0.44	4.40
Demand (Million tons)	11.12	11.52	0.40	3.60
• Domestic utilization	10.53	10.81	0.28	2.66
• Export	0.14	0.14	0.00	0.00
• Ending stock	0.45	0.56	0.11	24.44
Ratio of production to domestic utilization (%)	5.89	5.88	-0.01	-
Ratio of beginning stock to domestic utilization (%)	4.84	4.17	-0.67	-

ASEAN Soybean Situation in 2025

Production

The soybean production in ASEAN in 2025 (crop year 2024/2025) is 0.62 million tons, an increase of 18,410 tons from 0.60 million tons in 2024 (crop year 2023/2024). The increase in production is observed in Cambodia, Lao PDR, Myanmar, and Vietnam. A reduction in soybean production is observed in Indonesia, the Philippines, and Thailand. Although Indonesia is the largest soybean-producing country, the soybean production drops approximately to 0.22 million tons in 2025 (Tables 47–50, Figures 46–49).

For Cambodia in 2025, the increase in production is attributed to expansions in both planted area and yield. The increase in planted area is due to the rising soybean prices, the declining prices of competing crops, and supportive government policies. Additionally, the increase in yield is driven by fertilizer sufficiency and improving crop management.

For Indonesia in 2025, the decrease in production is attributed to the reduction in yield. The decrease in yield is driven by the unfavorable weather conditions and natural damage, particularly floods and disease outbreaks. Meanwhile, the expansion in harvested area is influenced by rising soybean prices, supportive government policies, and lowering damage area.

For Lao PDR in 2025, the increase in the production is attributed to the expansion in planted area. The increase is driven by rising soybean prices and supportive government policies. Meanwhile, the decrease in yield is affected by fertilizer deficits, which is mostly affected in both dry and wet cropping seasons.

For Myanmar in 2025, the increase in production is attributed to expansions in both planted area and yield. The increase in planted area is driven by rising soybean prices and declining prices of competing crops. Additionally, the increase in yield is driven by farmers improving crops management and using the high-yield of soybean varieties, despite some areas being affected by floods and fertilizer deficits.

For the Philippines in 2025, the decrease in production is attributed to the reduction in yield. The reduction is affected by pest infestations and fertilizer deficits. Meanwhile, the increase in the planted area is driven by favorable weather conditions, despite the lack of seeds mostly affected in the wet season.

For Thailand in 2025, the decrease in production is attributed to the reduction in planted area. The reduction is affected by declining soybean prices and high costs of production. Meanwhile, the yield is improved due to sufficient water supply and farmers improving crop management.

For Vietnam in 2025, the increase in production is attributed to expansions in both planted area and yield. The improvement is driven by farmers improving crop management.

Utilization and Stock

The domestic utilization of soybeans in ASEAN increases to 10.53 million tons in 2025, up from 9.84 million tons in 2024 (Tables 52–53). The beginning stock of soybeans in ASEAN for 2025 is at 0.51 million tons, up from 0.11 million tons in 2024. The ending stock of soybeans in ASEAN for 2025 is at 0.45 million tons, down from 0.51 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) in ASEAN for 2025 is 5.89 percent, reflecting a decrease from 6.12 percent in 2024 (Table 55, Figure 57).

Additionally, the food security ratio, representing the ratio of beginning stock to domestic utilization in ASEAN for 2025 is at 4.84 percent, showing an increase from 1.09 percent in 2024 (Table 56, Figure 58).

Trade

In 2025, ASEAN exports a total of 139,239 tons of soybeans, increasing 29,416 tons from 109,823 tons in 2024. Additionally, ASEAN countries import 9.99 million tons in 2025, increasing 0.24 million tons from 9.75 million tons in 2024 (Tables 52–53, Figures 50–51).

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 from 2024 to 2025 are presented in Table 59, and also the monthly CIF prices for importing countries are presented in Table 60 and Figures 59–60.

Damaged Area

The total damaged area of soybeans in ASEAN in 2025 is at 986 hectares. The most causes of damage are floods, which affected 643 hectares in Myanmar, along with droughts and unspecified damage of 53 and 290 hectares, respectively (Table 51).

Prospects for Soybean in 2026

Production

The forecast for soybean production in ASEAN in 2026 indicates an increase of 15,650 tons (2.52 percent increases) from 620,210 tons in 2025 to 635,860 tons in 2026 (Table 47, Figure 46). Increases in production are observed in Lao PDR, Myanmar, and Vietnam is expected to increase. However, production is expected to decline in Cambodia, Indonesia, the Philippines (AFSIS forecast), and Thailand.

For Indonesia in 2026, the production is expected to slightly decrease, driven by the reduction in yield. The reduction in yield is expected to be affected by unfavorable weather conditions, and natural damage, particularly droughts, pest infestations, and plant diseases. The planted area is expected to increase due to rising soybean prices, favorable weather conditions, and supportive government policies.

For Lao PDR in 2026, the production is expected to increase, influencing by expansions in both planted area and yield. The expansion in planted area is due to rising soybean prices and supportive government policies. Moreover, yield is also expected to increase due to fertilizer sufficiency and improving crop management.

For Vietnam in 2026, the production is expected to increase due to expansions in both planted area and yield. Yield is expected to increase with improvement similar from previous year.

Utilization and Stock

The domestic utilization of soybeans in ASEAN is forecast to increase by 0.28 million tons (2.65 percent increases) from 10.53 million tons in 2025 to 10.81 million tons in 2026 (Tables 52–53).

The beginning stock in ASEAN in 2026 is forecast to decrease by 58,808 tons (11.53 percent decreases) from 0.51 million tons in 2025 to 0.45 million tons in 2026 (Tables 53–54). The ending stock in ASEAN in 2026 is forecast to increase by 110,966 tons (24.59 percent increases) from 0.45 million tons in 2025 to 0.56 million tons in 2026 (Tables 53–54, Figure 56).

The ratio of production to domestic utilization (self-sufficiency ratio) in 2026 is estimated to be 5.88 percent, slightly decreasing from 5.89 percent in 2025 (Table 55, Figure 57).

The ratio of beginning stock to domestic utilization (food security ratio) in 2026 is estimated to be 4.17 percent in 2026, decreasing from 4.84 percent in 2025 (Table 56, Figure 58).

Trade

The export of soybeans is forecast to increase by 4,071 tons (2.92 percent increases) from 139,239 tons in 2025 to 143,310 tons in 2026. The import of soybeans is forecast to increase by 0.44 million tons (4.38 percent increases) from 9.99 million tons in 2025 to 10.43 million tons in 2026 (Tables 53–54, Figures 50, 52–53, and 55).

Compared with the global soybean production, the high record of productions dominated by Brazil and the United States^{6–7}, while ASEAN remains a structurally import-dependent region. ASEAN soybean production in 2025 rises slightly to 0.62 million tons, but this less than 6 percent of domestic utilization, which increases sharply to 10.53 million tons. Despite modest production gains in Cambodia, Lao PDR, Myanmar, and Vietnam, declines in major producers, particularly in Indonesia, the Philippines, and Thailand, compensate a regional growth. This causes the self-sufficiency ratio to fall to 5.89 percent.

The result reveals that ASEAN relies heavily on imports, which reach 9.99 million tons in 2025 and are forecast to exceed 10.4 million tons in 2026, aligning the region closely with global supply conditions and major exporters such as Brazil and the United States^{6–7}. Although stocks improve compared with 2024, both food security and self-sufficiency ratios remain low. It emphasizes ASEAN's to continue vulnerability to global soybean market volatility and external supply shocks.

References:

6. Global soybean market analysis (2024/2025) [Internet]. Grain Fuel-Nexus. 2025 [cited 2025 December 29]. Available from: <https://www.grainfuel-nexus.com/navigating-trade-dynamics/global-soybean-market-analysis-2024-2025>.
7. Global soybean production in 2025: Trends, statistics, and market insights [Internet]. StatRanker. 2025 [cited 2025 December 29]. Available from: <https://statranker.org/economy/global-soybean-production-in-2025-trends-statistics-and-market-insights>.

Table 47. Soybean production in ASEAN countries from 2024 to 2026.

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	601.80	620.21	18.41	3.06	635.86	15.65	2.52
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	18.08	24.33	6.25	34.57	21.07	-3.25	-13.36
Indonesia	230.21	221.46	-8.75	-3.80	221.18	-0.28	-0.13
Lao PDR	80.30	87.70	7.40	9.22	93.00	5.30	6.04
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	210.27	223.34	13.06	6.21	237.21*	13.87	6.21
Philippines	0.60	0.51	-0.09	-15.44	0.40*	-0.11	-21.25
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	16.29	15.92	-0.37	-2.29	15.59	-0.33	-2.05
Vietnam	46.05	46.97	0.92	2.00	47.41	0.44	0.94

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 48. Soybean planted area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	361.44	399.59	38.14	10.55	439.98	40.39	10.11
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	11.44	14.91	3.47	30.35	13.17	-1.74	-11.64
Indonesia	135.43	157.96	22.53	16.64	188.78	30.82	19.51
Lao PDR	36.23	39.58	3.35	9.24	41.40	1.82	4.60
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	139.33	148.43	9.10	6.53	158.12*	9.69	6.53
Philippines	0.38	0.38	0.00	0.66	0.30*	-0.08	-21.24
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	10.13	9.61	-0.52	-5.12	9.30	-0.31	-3.25
Vietnam	28.51	28.72	0.21	0.74	28.91	0.19	0.66

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Table 49. Soybean harvested area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	361.23	398.60	37.37	10.34	438.74	40.14	10.07
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	11.44	14.62	3.18	27.82	13.17	-1.45	-9.89
Indonesia	135.28	157.89	22.61	16.71	188.78	30.89	19.56
Lao PDR	36.23	39.58	3.35	9.24	41.40	1.82	4.60
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	139.29	147.86	8.56	6.15	156.93*	9.08	6.14
Philippines	0.38	0.38	0.00	0.66	0.30*	-0.08	-21.24
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	10.10	9.56	-0.55	-5.41	9.25	-0.31	-3.20
Vietnam	28.51	28.72	0.21	0.74	28.91	0.19	0.66

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Table 50. Soybean yield in ASEAN countries from 2024 to 2026.

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	1.67	1.56	-0.11	-6.60	1.45	-0.11	-6.86
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	1.58	1.66	0.08	5.28	1.60	-0.06	-3.85
Indonesia	1.70	1.40	-0.30	-17.58	1.17	-0.23	-16.47
Lao PDR	2.22	2.22	0.00	-0.02	2.25	0.03	1.38
Malaysia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Myanmar	1.51	1.51	0.00	0.06	1.51*	0.00	0.07
Philippines	1.59	1.33	-0.25	-16.00	1.33*	0.00	-0.01
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1.61	1.67	0.05	3.30	1.69	0.02	1.19
Vietnam	1.62	1.64	0.02	1.25	1.64	0.00	0.27

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Table 51. Soybean damaged area in ASEAN countries by cause of damage in 2025.

Unit: Hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	643	53	0	0	0	290	986
Brunei	0	0	0	0	0	0	0
Cambodia ^{a/}	0	0	0	0	0	290	290
Indonesia	72	0	0		0	0	72
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0
Myanmar	571	0	0	0	0	0	571
Philippines	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0
Thailand	0	53	0	0	0	0	53
Vietnam	0	0	0	0	0	0	0

Remark: - refers to data that is **Not Applicable**.

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Table 52. Soybean balance sheet of ASEAN countries in 2024.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	107,490	601,800	9,748,691	10,457,982	9,838,135	109,823	510,024	10,457,982
Brunei	0	0	755	755	755	0	0	755
Cambodia ^{a/}	0	18,076	53,632*	71,708	16,858	54,850	0	71,708
Indonesia	21,758	230,209	2,676,317	2,928,284	2,611,981	2,638	313,665	2,928,284
Lao PDR	5,353	80,300	13,814	99,468	5,545	33,693	60,230	99,468
Malaysia	0	0	703,773	703,773	692,013*	11,760	0	703,773
Myanmar	6,740	210,274	835	217,849	198,536	220	19,093	217,849
Philippines	6,614	601	190,000	197,215	182,000	0	15,215	197,215
Singapore	0	0	20,295	20,295	19,588	708	0	20,295
Thailand	0	16,290	3,871,096	3,887,386	3,887,140	246	0	3,887,386
Vietnam	67,025	46,050	2,218,174	2,331,249	2,223,719	5,708	101,822	2,331,249

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Table 53. Soybean balance sheet of ASEAN countries in 2025.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	510,024	620,213	9,993,597	11,123,834	10,533,379	139,239	451,216	11,123,834
Brunei	0	0	777	777	777	0	0	777
Cambodia ^{a/}	0	24,325	39,788*	64,113	15,322	48,791	0	64,113
Indonesia	313,665	221,456	2,376,869	2,911,990	2,807,186	2,952	101,852	2,911,990
Lao PDR	60,230	87,700	15,738	163,668	5,313	67,844	90,510	163,668
Malaysia	0	0	653,065*	653,065	642,152*	10,913*	0	653,065
Myanmar	19,093	223,337	632	243,062	187,021	5	56,036	243,062
Philippines	15,215	508	195,135	210,858	197,365	0	13,493	210,858
Singapore	0	0	21,617	21,617	21,591	26	0	21,617
Thailand	0	15,917	4,100,000	4,115,917	4,115,717	200	0	4,115,917
Vietnam	101,822	46,970	2,589,976	2,738,768	2,540,935	8,508	189,325	2,738,768

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Table 54. Soybean balance sheet of ASEAN countries in 2026.

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	451,216	635,865	10,431,238	11,518,318	10,812,826	143,310	562,182	11,518,318
Brunei	0	0	801	801	801	0	0	801
Cambodia ^{a/}	0	21,075	46,836*	67,911	16,090	51,821	0	67,911
Indonesia	101,852	221,177	2,442,538	2,765,567	2,703,862	2,717	58,988	2,765,567
Lao PDR	90,510	93,000	12,586	196,096	5,857	71,575	118,663	196,096
Malaysia	0	0	635,776*	635,776	625,152*	10,624*	0	635,776
Myanmar	56,036	237,213*	671*	293,920	247,008*	6*	46,906	293,920
Philippines	13,493	400*	195,000*	208,893	170,000*	0	38,893	208,893
Singapore	0	0	20,956	20,956	20,589	367	0	20,956
Thailand	0	15,590	4,340,000*	4,355,590	4,355,390*	200*	0	4,355,590
Vietnam	189,325	47,410	2,736,074	2,972,809	2,668,077	6,000	298,732	2,972,809

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Table 55. Ratio of soybean production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	601,799.66	9,838,134.52	6.12	620,213.00	10,533,379.42	5.89	635,864.56	10,812,826.48	5.88
Brunei	0.00	754.76	0.00	0.00	777.00	0.00	0.00	801.00	0.00
Cambodia ^{a/}	18,076.00	16,858.00	107.23	24,325.00	15,322.00	158.76	21,074.56	16,090.00	130.98
Indonesia	230,209.00	2,611,981.00	8.81	221,456.00	2,807,186.00	7.89	221,177.00	2,703,862.00	8.18
Lao PDR	80,300.00	5,545.02	1,448.15	87,700.00	5,313.42	1,650.54	93,000.00	5,857.48	1,587.71
Malaysia	0.00	692,013.00*	0.00	0.00	642,152.00*	0.00	0.00	625,152.00*	0.00
Myanmar	210,274.00	198,536.00	105.91	223,337.00	187,021.00	119.42	237,213.00*	247,008.00*	96.03
Philippines	600.66	182,000.00	0.33	508.00	197,365.00	0.26	400.00*	170,000.00*	0.24
Singapore	0.00	19,587.75	0.00	0.00	21,591.00	0.00	0.00	20,589.00	0.00
Thailand	16,290.00	3,887,140.00	0.42	15,917.00	4,115,717.00	0.39	15,590.00	4,355,390.00*	0.36
Vietnam	46,050.00	2,223,719.00	2.07	46,970.00	2,540,935.00	1.85	47,410.00	2,668,077.00	1.78

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a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions.

Therefore, the information for Cambodia presented in this report is based on ACO Report No. 34.

Table 56. Ratio of soybean beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	107,490.42	9,838,134.52	1.09	510,024.34	10,533,379.42	4.84	451,215.92	10,812,826.48	4.17
Brunei	0.00	754.76	0.00	0.00	777.00	0.00	0.00	801.00	0.00
Cambodia ^{a/}	0.00	16,858.00	0.00	0.00	15,322.00	0.00	0.00	16,090.00	0.00
Indonesia	21,758.00	2,611,981.00	0.83	313,664.99	2,807,186.00	11.17	101,851.99	2,703,862.00	3.77
Lao PDR	5,353.42	5,545.02	96.54	60,229.69	5,313.42	1,133.54	90,510.27	5,857.48	1,545.21
Malaysia	0.00	692,013.00*	0.00	0.00	642,152.00*	0.00	0.00	625,152.00*	0.00
Myanmar	6,740.00	198,536.00	3.39	19,093.00	187,021.00	10.21	56,036.00	247,008.00*	22.69
Philippines	6,614.00	182,000.00	3.63	15,214.66	197,365.00	7.71	13,492.66	170,000.00*	7.94
Singapore	0.00	19,587.75	0.00	0.00	21,591.00	0.00	0.00	20,589.00	0.00
Thailand	0.00	3,887,140.00	0.00	0.00	4,115,717.00	0.00	0.00	4,355,390.00*	0.00
Vietnam	67,025.00	2,223,719.00	3.01	101,822.00	2,540,935.00	4.01	189,325.00	2,668,077.00	7.10

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Therefore, the information for Cambodia presented in this report is based on ACO Report No. 34.

Table 57. Quantity and value of soybean exports by countries of destination in 2025.

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	Vietnam	21,673	12,136,656	21,673	12,136,656	-	-	21,673	12,136,656
Indonesia	Brunei	0.30	634	0.30	634	2,427	820,854	2,427	821,489
Lao PDR	-	-	-	-	-	67,844	25,805,540	67,844	25,805,540
Malaysia	Brunei	41	28,391	7,017	4,147,032	115	112,073	7,132	4,259,105
	Indonesia	6,727	3,895,384						
	Philippines	42	35,121						
	Singapore	165	158,246						
	Thailand	0.020	3						
	Vietnam	42	29,888						
Myanmar	-	-	-	-	-	5	4,000	5	4,000
Philippines	-	-	-	-	-	1	420	1	420
Singapore	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-	-	-
Vietnam	Cambodia	-	3,223,519	-	3,269,546	-	26,387	-	3,295,932
	Lao PDR	-	46,027						

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 58. Quantity and value of soybean imports by countries of origin in 2025

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	4,620	2,421,832	4,620	2,421,844	1,919,884	889,159,236	1,924,504	891,581,080
	Thailand	0.002	12						
Lao PDR	Thailand	5,119	2,070,698	7,725	3,162,028	8,013	3,706,621	15,738	6,868,649
	Vietnam	2,606	1,091,330						
Malaysia	-	-	-	-	-	575,748	273,178,508	575,748	273,178,508
Myanmar	-	-	-	-	-	632	892,000	632	892,000
Philippines	-	-	-	-	-	86,598	40,230,653	86,598	40,230,653
Singapore	Indonesia	4	24,448	2,130	5,075,064	19,487	34,431,261	21,617	39,506,325
	Malaysia	2,126	5,046,370						
	Myanmar	0.19	1,010						
	Thailand	0.40	3,236						
Thailand	Cambodia	938	414,745	12,032	4,676,134	4,614,113	1,990,373,039	4,626,145	1,995,049,173
	Vietnam	11,094	4,261,389						
Vietnam	Cambodia	7,255	5,274,746	7,255	5,274,746	2,151,059	998,081,455	2,158,314	1,003,356,201

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 59. FOB prices of soybean in selected ASEAN countries.

Unit: US\$/Ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia ^{a/}	Not specified	2024	579	550	566	527	550	580	550	566	673	598	585	580	575
		2025	554	549	560	570	580	549	-	-	-	-	-	-	560
Indonesia	HS-code 12019000	2024	428	460	578	342	597	412	511	288	444	296	437	364	430
		2025	256	431	434	283	356	397	288	551	229	-	-	-	358
Lao PDR	Grade A	2024	343	346	425	380	345	380	357	375	366	372	378	380	371
		2025	380	380	380	381	500	380	500	380	374	355	-	-	401
Malaysia	HS-code 1201100000	2024	702	659	656	643	665	642	636	621	658	621	561	556	635
		2025	529	579	574	570	591	583	579	596	599	-	-	-	578
	HS-code 1201900000	2024	1,073	1,203	1,091	1,737	2,934	917	1,194	1,035	461	4,180	1,077	889	1,483
		2025	879	943	1,005	1,169	739	1,260	889	3,203	1,741	-	-	-	1,314
Myanmar	Not specified	2024	879	877	0	0	0	0	0	0	0	0	0	0	878
		2025	0	0	0	0	0	796	0	1,000	-	-	-	-	898
Vietnam	Not specified	2024	575	558	516	500	508	513	508	502	485	493	496	462	510
		2025	462	458	443	444	494	-	-	-	-	-	-	-	460

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 60. CIF prices of soybean 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 12019000	2024	572	571	553	528	521	514	522	519	510	499	482	467	522
		2025	464	464	451	470	452	457	466	469	467	-	-	-	462
Lao PDR	Grade A	2024	468	446	563	413	508	523	525	465	481	400	389	490	472
		2025	426	430	448	442	441	391	400	382	414	425	-	-	420
Malaysia	HS-code 1201100000	2024	560	572	562	545	534	533	533	575	547	497	502	479	537
		2025	465	459	465	480	470	468	459	481	465	-	-	-	468
	HS-code 1201900000	2024	564	557	565	496	580	525	519	613	538	457	515	494	535
		2025	480	475	476	456	500	506	502	516	505	-	-	-	491
Myanmar	Not specified	2024	1,030	0	0	0	1,146	0	1,149	1,149	900	0	0	0	1,075
		2025	0	0	0	1,409	0	1,413	0	1,413	-	-	-	-	1,412
Philippines	Not specified 1	2024	863	0	0	0	0	11,486	0	530	0	1,140	0	0	3,505
		2025	443	443	443	436	423	425	426	0	453	-	-	-	436
	Not specified 2	2024	660	600	622	608	548	566	629	624	587	620	663	518	604
		2025	499	552	532	520	590	581	572	542	559	-	-	-	550
Singapore	Not specified	2024	950	1,011	919	923	932	934	944	907	912	882	889	891	925
		2025	848	825	806	822	783	759	755	758	747	791	710	691	775
Thailand	Not specified	2024	571	562	527	497	475	463	481	513	511	485	454	481	502
		2025	469	470	446	432	429	439	438	456	452	-	-	-	448

Remark: - refers to data that is **Not Applicable**.

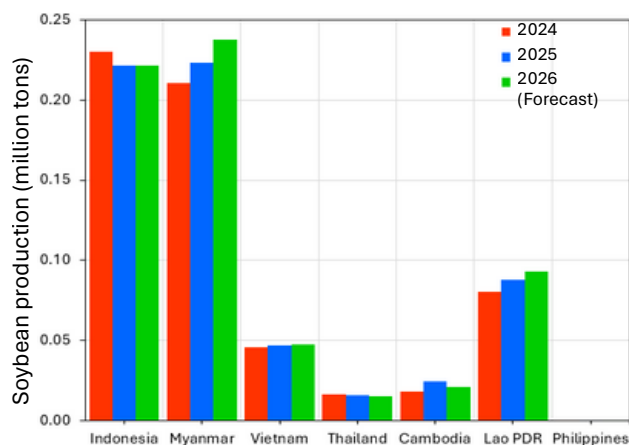


Figure 46. Soybean production of selected countries in ASEAN from 2024 to 2026.

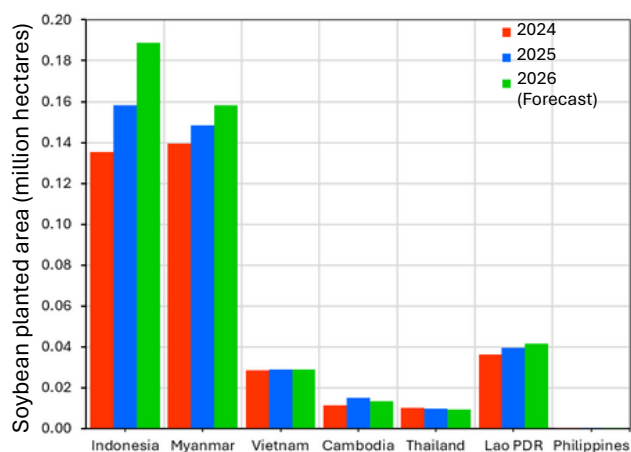


Figure 47. Soybean planted area of selected countries in ASEAN from 2024 to 2026.

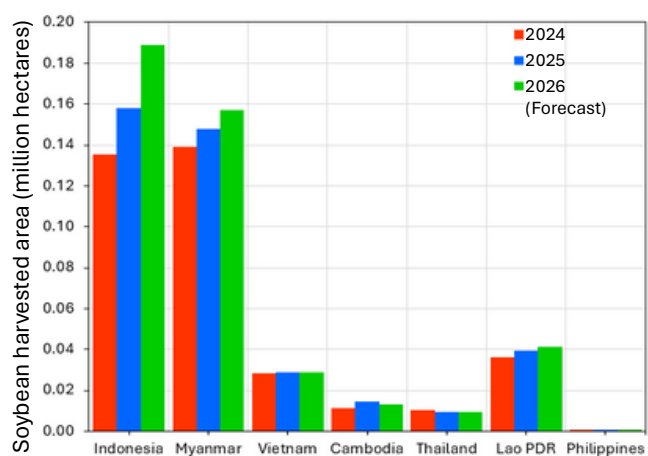


Figure 48. Soybean harvested area of selected countries in ASEAN from 2024 to 2026.

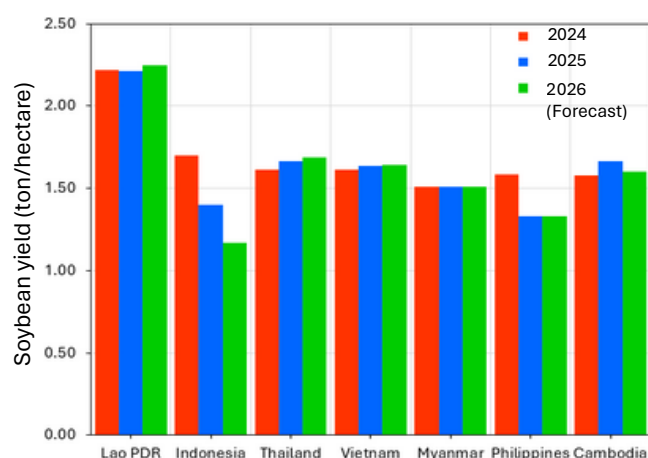


Figure 49. Soybean yield of selected countries in ASEAN from 2024 to 2026.

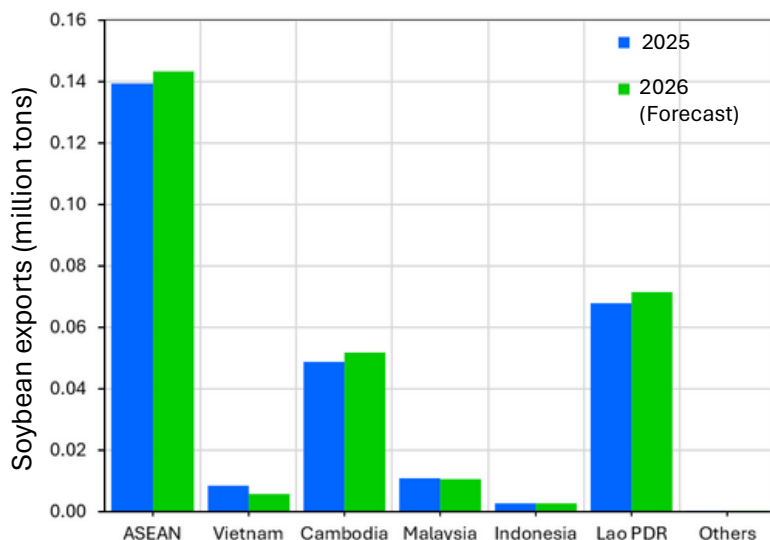


Figure 50. Amount of soybean exports of selected countries in ASEAN from 2025 to 2026.

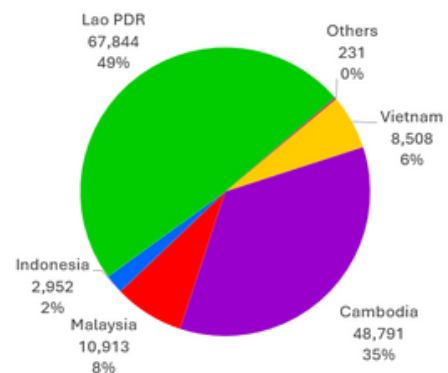


Figure 51. Share of soybean exports (tons) among ASEAN countries in 2025, totaling 139,239 tons.

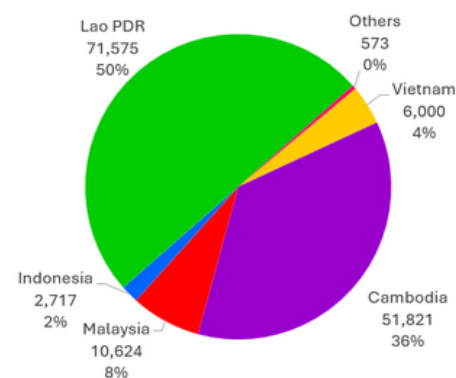


Figure 52. Share of soybean exports (tons) among ASEAN countries in 2026, totaling 143,310 tons.

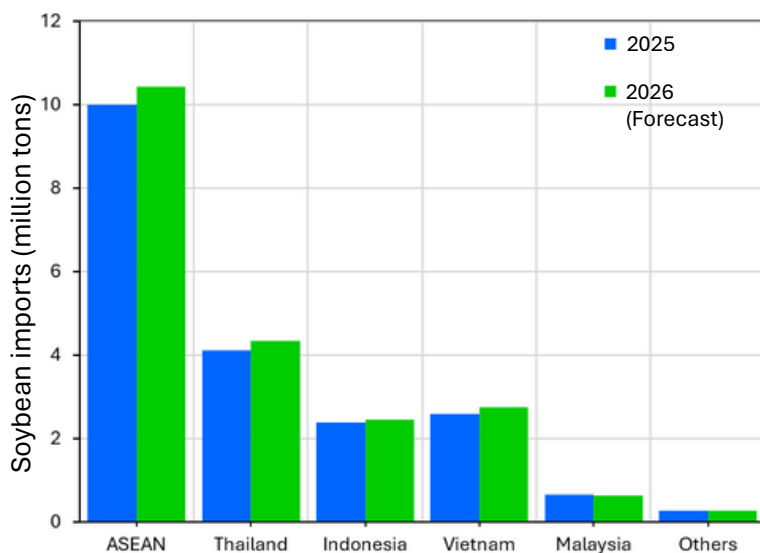


Figure 53. Amount of soybean imports of selected countries in ASEAN from 2025 to 2026.

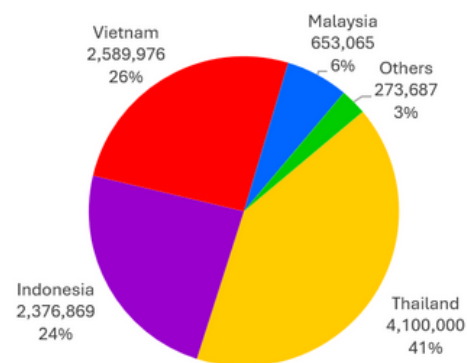


Figure 54. Share of soybean imports (tons) among ASEAN countries in 2025, totaling 9.99 million tons.

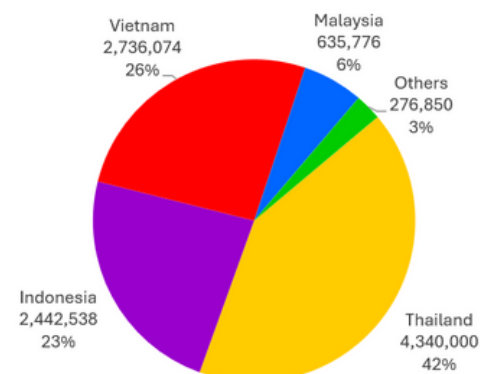


Figure 55. Share of soybean imports (tons) among ASEAN countries in 2026, totaling 10.43 million tons.

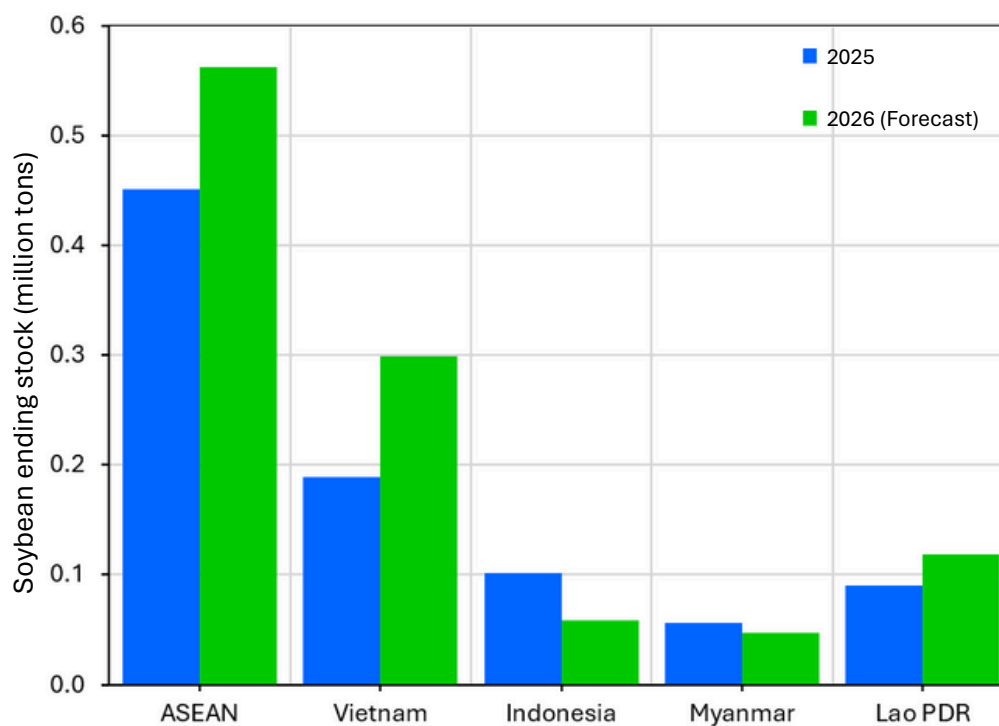


Figure 56. Amount of ending stock of soybean in ASEAN from 2025 to 2026.

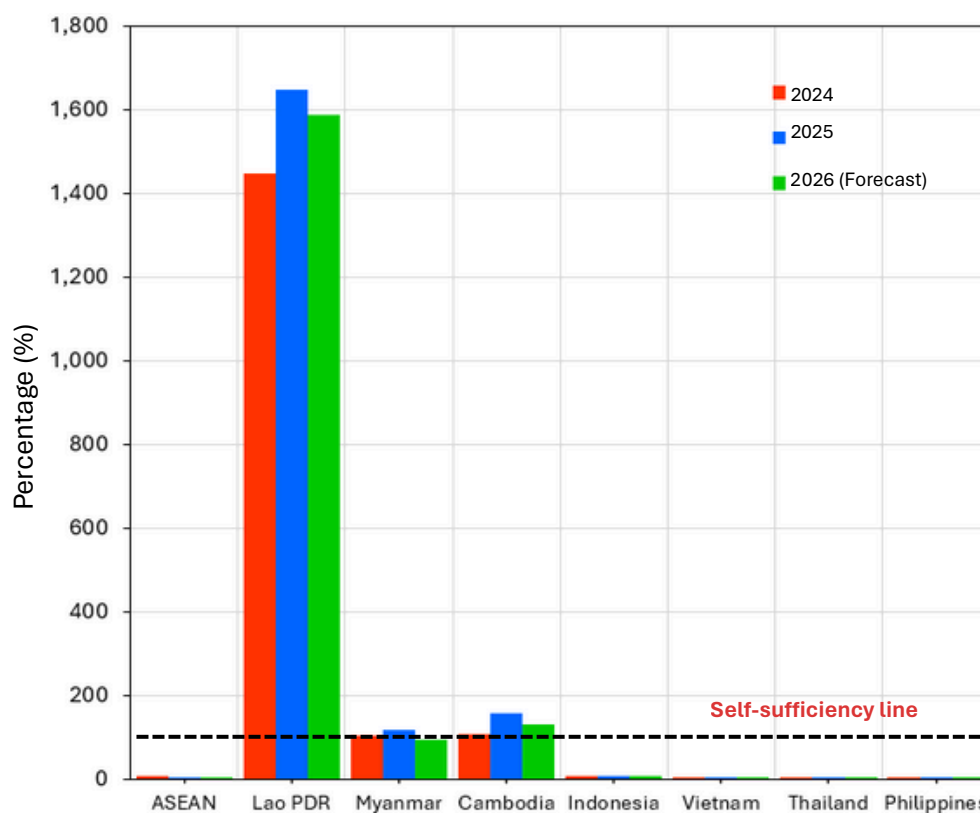


Figure 57. Ratio of soybean production to domestic utilization in ASEAN from 2024 to 2026.

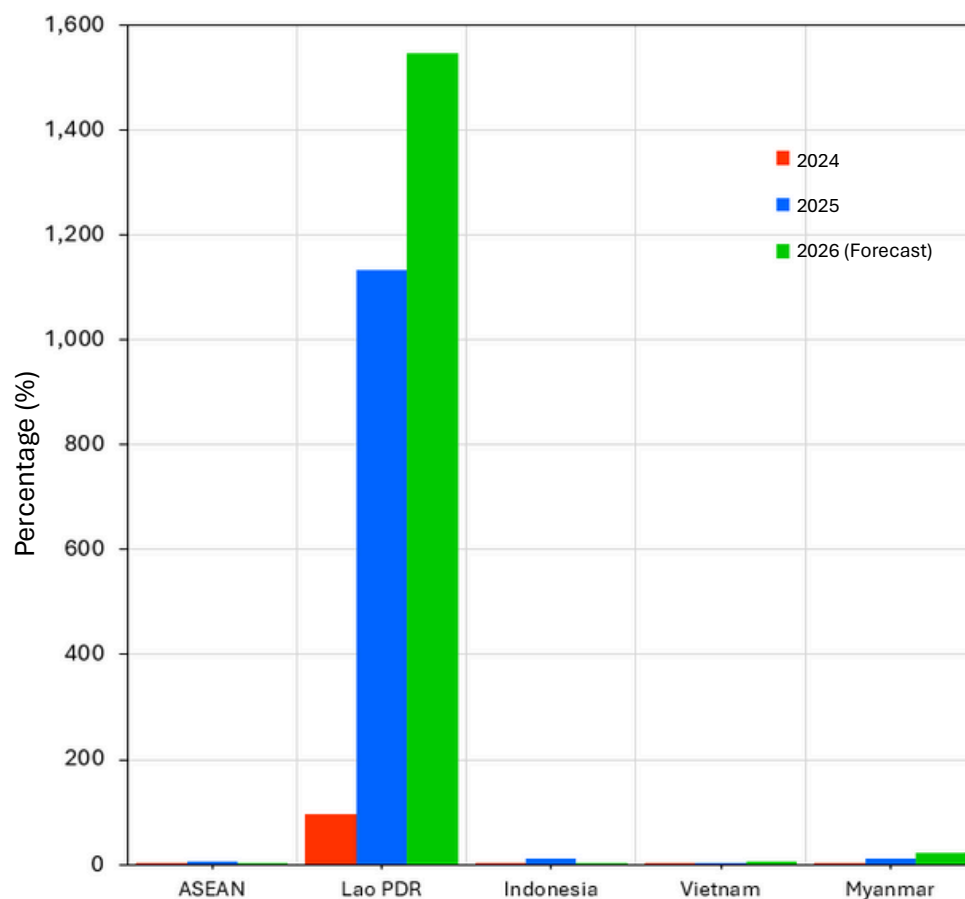


Figure 58. Ratio of soybean beginning stock to domestic utilization in ASEAN from 2024 to 2026.

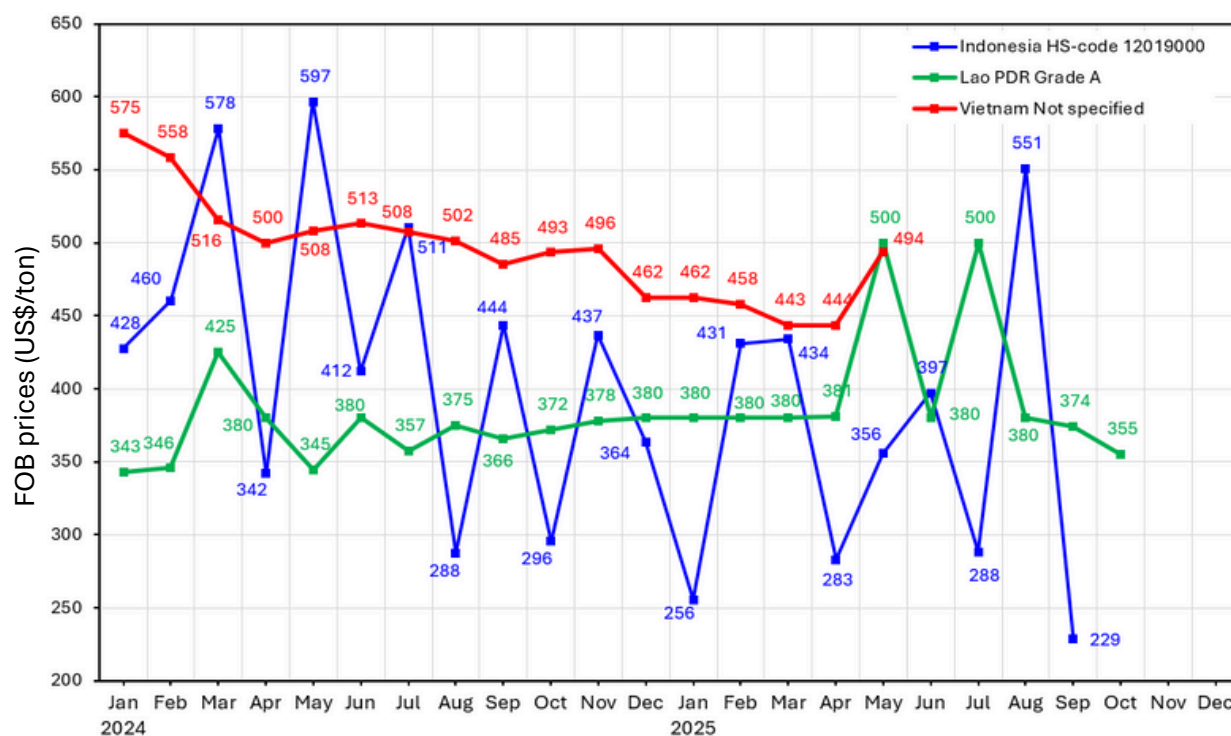


Figure 59. FOB prices (US\$/ton) of soybean of selected countries in ASEAN from 2024 to 2025.

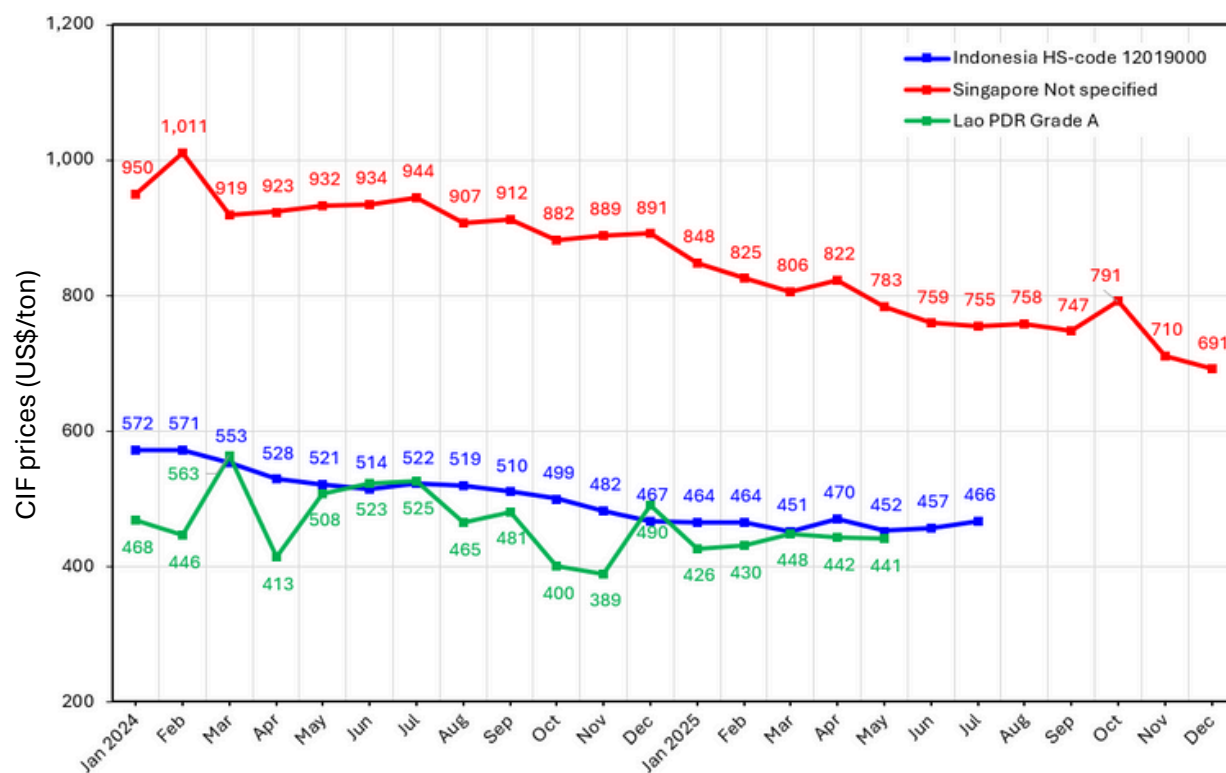


Figure 60. CIF prices (US\$/ton) of soybean of selected countries in ASEAN from 2024 to 2025.

Cassava Outlook for 2026

Highlights

The forecast for the supply of cassava in ASEAN indicates a decrease from 106.76 million tons in 2025 to 103.74 million tons in 2026, decreasing 3.02 million tons (2.83 percent decreases) (Table 61). This reduction in supply is influenced by decreases in the beginning stock, production, and import. The beginning stock is estimated at 16.56 million tons in 2026, decreasing 0.74 million tons (4.28 percent decreases) from 17.30 million tons in 2025. Cassava production for 2026 is estimated at 77.73 million tons, a decrease from 78.99 million tons in 2025. Additionally, the import of cassava is forecast to decrease by 1.02 million tons (9.75 percent decreases) from 10.46 million tons in 2025 to 9.44 million tons in 2026.

The decrease in demand for cassava is primarily attributed to the export. Meanwhile, the increases are observed in domestic utilization and ending stock. The domestic utilization is forecast to be 50.05 million tons in 2026, increasing 0.52 million tons (1.05 percent increases) from 49.53 million tons in 2025. The export is forecast to decrease by 7.63 million tons (18.76 percent decreases) from 40.67 million tons in 2025 to 33.04 million tons in 2026. The ending stock is expected to increase by 4.09 million tons (24.70 percent increases) from 16.56 million tons in 2025 to 20.65 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) in 2026 is estimated to be 155.31 percent, which decrease from 159.49 percent in 2025. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 33.09 percent in 2026, showing a decrease from 34.94 percent in 2025.

Table 61. Summary of the ASEAN cassava situation from 2025 to 2026.

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	106.76	103.74	-3.02	-2.83
• Beginning stock	17.30	16.56	-0.74	-4.28
• Production	78.99	77.73	-1.26	-1.60
• Import	10.46	9.44	-1.02	-9.75
Demand (Million tons)	106.76	103.74	-3.02	-2.83
• Domestic utilization	49.53	50.05	0.52	1.05
• Export	40.67	33.04	-7.63	-18.76
• Ending stock	16.56	20.65	4.09	24.70
Ratio of production to domestic utilization (%)	159.49	155.31	-4.18	-
Ratio of beginning stock to domestic utilization (%)	34.94	33.09	-1.85	-

ASEAN Cassava Situation in 2025



Production

In 2025 (crop year 2024/2025), cassava (fresh root) production in ASEAN is at 78.99 million tons, decreasing 2.70 million tons, (3.31 percent decreases) from the 81.70 million tons recorded in 2024. A decrease in production is observed in Brunei Darussalam, Cambodia, Indonesia, the Philippines, and Thailand. However, an increase in cassava production is observed in Lao PDR, Malaysia, Myanmar, and Vietnam (Tables 62–65 and Figures 61–64).

For Brunei in 2025, the increase in production is attributed to the increase in yield, which is driven by farmers using more fertilizer and improving crop management.

For Cambodia in 2025, the decrease in production is attributed to the decrease in planted area. Meanwhile, the yield is slightly increased due to farmers using the high-yield of cassava varieties, applying more fertilizer, and improving crop management.

For Indonesia in 2025, decreases in production are attributed to reductions in both planted area and yield. The decrease in planted area is affected by the rising prices of competing crops and competing with other food crops, horticulture, and estate crops, which are economically profitable. Similarly, the yield decreases due to fertilizer deficits. Additionally, Insufficient government support for cassava and low prices have caused farmers to neglect crop maintenance, leading to decreased productivity.

For Lao PDR in 2025, increases in production are attributed to expansions in both planted area and yield. The expansion in planted area is driven by declining prices of competing crops and supportive government policies. The yield is also increased due to farmers using the high-yield of cassava varieties and improving crop management.

For Myanmar in 2025, the production shows a slightly increase due to an increase in the harvested area. However, the decrease in planted area is influenced by rising prices of competing crops and natural damage such as floods, while the decrease in yield is influenced by natural damage, particularly floods.

For the Philippines in 2025, the decrease in production is primarily attributed to the reduction in yield. The reduction is affected by natural damage from droughts and fertilizer deficits mainly in the first cropping season, and the frequent weather changes from excessive heat to heavy rainfall in the second cropping season. Meanwhile, the increase in the harvested area is attributed to availability of planting materials in the second cropping season, despite unfavorable weather conditions, particularly extreme hot weather in the first cropping season.

For Thailand in 2025, decreases in production is attributed to reductions in both planted area and yield. The decrease in planted area is affected by the extremely drought conditions and the lack of planting stocks, leading to shift cultivating other value crops. Furthermore, the yield is also decreased due to natural damage from droughts, floods, and plant diseases.

For Vietnam in 2025, the increase in production is attributed to the expansion in planted area due to rising demand of exports. Yield shows only remaining from the previous year.



Utilization and Stock

In 2025, the domestic utilization in ASEAN is 49.53 million tons, decreasing 2.61 million tons (5.01 percent decreases) from 52.14 million tons in 2024 (Tables 67–68). The beginning stock is 17.30 million tons, increasing 7.68 million tons (79.80 percent increases) from 9.62 million tons in 2024. The ending stock in 2025 is 16.56 million tons, decreasing 0.74 million tons (4.29 percent decreases) from 17.30 million tons in 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) in 2025 increases to 159.49 percent in 2025, up from 156.68 percent in 2024 (Table 70, Figure 72).

The ratio of ASEAN's beginning stock to domestic utilization (food security ratio) in 2025 is 34.94 percent in 2025, up from 18.46 percent in 2024 (Table 71, Figure 73).



Trade

ASEAN's cassava exports in 2025 total 40.67 million tons, increasing 8.29 million tons (25.59 percent increases) from 32.38 million tons in 2024. ASEAN's cassava import in 2025 is 10.46 million tons, decreasing 0.05 million tons (0.44 percent decreases) from 10.51 million tons in 2024 (Tables 67–68, Figures 65–66, and 68–69).

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 Table 72 and 73, respectively.



Prices

The FOB prices of cassava in Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Thailand, and Vietnam for the years 2024 and 2025, along with the CIF prices in Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, and Singapore, are provided in Tables 74–75.



Damaged Area

The total damaged area of the cassava crop in ASEAN in 2025 is 110,145 hectares. The most causes of damage are droughts, which amounts 54,666 hectares in Thailand (Table 51).

Prospects for Cassava in 2026



Production

The forecast for cassava production in ASEAN in 2026 anticipates a total of 77.73 million tons, decreasing 1.26 million tons (1.60 percent decreases) from 78.99 million tons in 2025. Decreases in production are observed in Cambodia, Lao PDR, and Thailand. On the other hand, increases in cassava production are expected in Brunei Darussalam, Indonesia, Malaysia, Myanmar, the Philippines (AFSIS forecast), and Vietnam (Tables 62–65, Figures 61–64).

For Brunei Darussalam in 2026, the production is expected to increase, which results from fertilizer sufficiency and improving crop management.

For Cambodia in 2026, the decrease in production is attributed to yield. However, the planted area is expected to increase.

For Indonesia in 2026, the production is expected to increase due to expansions in both planted area and yield. The increase in planted area are influenced by declining prices of competing crops and favorable weather conditions. Additionally, yield is expected to increase due to favorable weather conditions, farmers improving crop management, and fertilizer sufficiency.

For Lao PDR in 2026, the production is expected to decrease due to reductions in both planted area and yield. The decrease in planted area is affected by declining cassava prices and government policies. Additionally, yield is also expected to decrease due to fertilizer deficits.

For Vietnam in 2026, the production is expected to increase due to the expansion in the planted area, which is driven by rising demand of exports.



Utilization and Stock

The forecast for the domestic utilization of cassava in 2026 anticipates an increase to 50.05 million tons, increasing 0.52 million tons (1.05 percent increases) compared to 49.53 million tons in 2025. The beginning stock for 2026 is forecast to decrease at 16.56 million tons, decreasing 0.74 million tons (4.29 percent decreases) from 17.30 million tons in 2025. The ending stock for 2026 is expected to be 20.65 million tons, indicating an increase of 4.09 million tons (24.70 percent increases) from 16.56 million tons in 2025 (Tables 68–69).

The forecast for the ratio of production to domestic utilization (self-sufficiency ratio) in 2026 is expected to be 155.31 percent, showing a decrease from 159.49 percent in 2025 (Table 70, Figure 72). In terms of the ratio of beginning stock to domestic utilization (food security ratio) in 2026, it is estimated to be 33.09 percent, representing a decrease from 34.94 percent in 2025. This indicates a strengthening of the cassava supply situation in 2026 (Table 71, Figure 73).



Trade

The forecast for cassava fresh root exports from ASEAN in 2026 indicates a decrease to 33.04 million tons, reducing 10.63 million tons (18.77 percent decreases) from 40.67 million tons in 2025. Additionally, imports are estimated to decrease to 9.44 million tons in 2026, decreasing 1.02 million tons (9.74 percent decreases) from 10.46 million tons in 2025 (Tables 68–69, Figures 65, 67, 69–70).

Global cassava production remained broadly stable in 2024 at around 330 million tons, and outlooks from 2025 to 2027 indicate stable or low growth due to climate that related to El Niño and La Niña⁸. Global consumption has also leveled off after peaking in 2023, although demand continues to be supported by food use and expanding industrial applications^{8–9}.

In contrast, ASEAN cassava production declined in 2025 to 78.99 million tons, down 3.31 percent from 2024, reflecting production losses in several major producing countries, including Thailand and Indonesia. Domestic utilization in ASEAN also declined more sharply than production, falling by 5.01 percent from 2024, indicating short-term demand adjustment in domestic and stock management rather than the structural cassava use. Despite lower output, ASEAN maintained a strong supply position due to a substantial increase in beginning stocks, which significantly improved the region's food security ratio.

ASEAN's role in global cassava trade remained crucial. Exports from the region rose by 25.59 percent in 2025, supported by stock reductions and strong external demand, particularly from Asian markets⁸. This diverges from the relatively stable global production picture and highlights ASEAN's function as a key buffer in global cassava supply. However, export volumes are forecast to decline in 2026 as raw material availability tightens⁸, suggesting that ASEAN supply conditions may constrain global markets earlier than global aggregates alone that would indicate.

In conclusion, while global cassava markets appear stable at the aggregate level, ASEAN dynamics reveal greater short-term volatility, driven by climate risks, stock management, and export demand. These developments emphasize the importance of close regional monitoring, particularly given ASEAN's strategic importance in global cassava supply and trade.

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8. Industry outlook 2025-2027: Cassava industry [Internet]. Krungsri Research. 2025 [cited 2025 December 30]. Available from: <https://www.krungsri.com/en/research/industry/industry-outlook/agriculture/cassava/io/cassava-2025-2027>.
9. Cassava market size, share, growth, and industry analysis, by type (cassava chips, cassava flour), by application (hypermarket & supermarket, convenience store, others), regional insights and forecast to 2034 [Internet]. Market Growth Reports. 2024 [cited 2025 December 30]. Available from: <https://www.marketgrowthreports.com/market-reports/cassava-market-118348>.

Table 62. Cassava production in ASEAN countries from 2024 to 2026.

Unit: 1,000 Tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	81,696.10	78,993.78	-2,702.32	-3.31	77,733.83	-1,259.96	-1.60
Brunei	0.43	0.34	-0.09	-21.03	0.35	0.02	5.00
Cambodia ^{a/}	15,560.58	15,298.44	-262.14	-1.68	14,986.70	-311.74	-2.04
Indonesia	16,705.83	15,702.14	-1,003.69	-6.01	17,040.27	1,338.12	8.52
Lao PDR	7,402.00	7,482.00	80.00	1.08	6,246.50	-1,235.50	-16.51
Malaysia	41.34	44.87	3.53	8.53	45.41	0.54	1.20
Myanmar	366.11	366.57	0.46	0.13	367.03*	0.46	0.13
Philippines	2,461.50	2,377.01	-84.49	-3.43	2,525.05*	148.04	6.23
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	28,624.31	26,977.74	-1,646.58	-5.75	25,562.95	-1,414.79	-5.24
Vietnam	10,534.00	10,744.68	210.68	2.00	10,959.57	214.89	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 63. Cassava planted area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	3,943.72	3,971.52	27.81	0.71	3,830.65	-140.87	-3.55
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	773.15	758.56	-14.59	-1.89	768.66	10.10	1.33
Indonesia	609.13	600.34	-8.79	-1.44	603.18	2.84	0.47
Lao PDR	295.00	296.50	1.50	0.51	255.00	-41.50	-14.00
Malaysia	2.48	2.55	0.07	3.00	2.63	0.08	3.00
Myanmar	26.19	22.59	-3.60	-13.73	22.30*	-0.29	-1.28
Philippines	228.63*	271.80*	43.17	18.88	224.43*	-47.36	-17.43
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,491.49	1,491.18	-0.31	-0.02	1,415.89	-75.30	-5.05
Vietnam	517.65	528.00	10.35	2.00	538.56	10.56	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 64. Cassava harvested area in ASEAN countries from 2024 to 2026.

Unit: 1,000 Hectares

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	3,910.42	3,816.64	-93.78	-2.40	3,713.68	-102.97	-2.70
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	772.82	757.00	-15.83	-2.05	768.54	11.54	1.52
Indonesia	609.13	600.34	-8.79	-1.44	603.18	2.84	0.47
Lao PDR	295.00	296.38	1.38	0.47	255.00	-41.38	-13.96
Malaysia	2.21	2.28	0.07	3.00	2.35	0.07	3.00
Myanmar	22.04	22.17	0.13	0.59	22.30*	0.13	0.59
Philippines	271.80	228.63	-43.17	-15.88	224.43*	-4.19	-1.83
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	1,419.77	1,381.85	-37.92	-2.67	1,299.32	-82.53	-5.97
Vietnam	517.65	528.00	10.35	2.00	538.56	10.56	2.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

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Table 65. Cassava yield in ASEAN countries from 2024 to 2026.

Unit: Ton/Hectare

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	20.89	20.70	-0.19	-0.91	20.93	0.23	1.11
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia ^{a/}	20.13	20.21	0.08	0.40	19.50	-0.71	-3.51
Indonesia	27.43	26.16	-1.27	-4.63	28.25	2.09	7.99
Lao PDR	25.09	25.24	0.15	0.60	24.50	-0.74	-2.93
Malaysia	18.69	19.70	1.01	5.40	19.35	-0.35	-1.78
Myanmar	16.61	16.53	-0.08	-0.48	16.46*	-0.07	-0.42
Philippines	9.06	10.40	1.34	14.79	11.25*	0.85	8.17
Singapore	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	20.16	19.52	-0.64	-3.17	19.67	0.15	0.77
Vietnam	20.35	20.35	0.00	0.00	20.35	0.00	0.00

Remark: * is noted that the value is estimated by the AFSIS Secretariat. N/A refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 66. Cassava damaged area in ASEAN countries by cause of damage in 2025.

Unit: Hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	22,285	54,666	0	32,799	0	395	110,145
Brunei	0	0	0	0	0	0	0
Cambodia ^{a/}	0	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	119	119
Malaysia	0	0	0	0	0	276	276
Myanmar	419	0	0	0	0	0	419
Philippines	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0
Thailand	21,866	54,666	0	32,799	0	0	109,331
Vietnam	0	0	0	0	0	0	0

Remark: - refers to data that is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 67. Cassava balance sheet of ASEAN countries in 2024 (cassava fresh root).

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	9,624,161	81,696,103	10,509,713	101,829,977	52,143,001	32,382,912	17,304,064	101,829,977
Brunei	0	425	0	425	425	0	0	425
Cambodia ^{a/}	7,078,270	15,560,580	0	22,638,850	9,163,001*	3,859,282*	9,616,567	22,638,850
Indonesia	0	16,705,832	1,089,698	17,795,530	17,711,186	84,344	0	17,795,530
Lao PDR	32,824	7,402,000	59,868	7,494,692	4,004,485	2,382,896	1,107,311	7,494,692
Malaysia	0	41,341	6,695	48,036	47,263	774	0	48,036
Myanmar	963,363	366,110	78	1,329,551	198,536	29,283	1,101,732	1,329,551
Philippines	0	2,461,502	130,000	2,591,502	2,589,902*	1,600	0	2,591,502
Singapore	0	0	1,692	1,692	1,690	2	0	1,692
Thailand	1,164,261	28,624,312	9,000,000	38,788,573	10,800,000	23,400,000	4,588,573	38,788,573
Vietnam	385,443	10,534,000	221,682	11,141,125	7,626,513	2,624,731	889,881	11,141,125

Remark: * is noted that the value is estimated by the AFSIS Secretariat.a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions.
Therefore, the information presented in this report is based on ACO Report No. 34.**Table 68.** Cassava balance sheet of ASEAN countries in 2025 (cassava fresh root).

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	17,304,064	78,993,782	10,463,141	106,760,988	49,529,053	40,670,770	16,561,166	106,760,989
Brunei	0	336	0	336	336	0	0	336
Cambodia ^{a/}	9,616,567	15,298,441	0	24,915,009	9,008,638*	3,000,000*	12,906,371	24,915,009
Indonesia	0	15,702,143	727,175	16,429,318	16,255,396	173,922	0	16,429,318
Lao PDR	1,107,311	7,482,000	51,353	8,640,664	3,602,861	4,756,939	280,865	8,640,664
Malaysia	0	44,868	5,026*	49,894	49,090	804	0	49,894
Myanmar	1,101,732	366,569	1,463	1,469,764	231,918	21,811	1,216,035	1,469,764
Philippines	0	2,377,011	100,789	2,477,800	2,476,489*	1,311	0	2,477,800
Singapore	0	0	1,547	1,547	1,547	1	0	1,547
Thailand	4,588,573	26,977,735	9,300,000	40,866,308	10,200,000	28,700,000	1,966,308	40,866,308
Vietnam	889,881	10,744,680	275,788	11,910,349	7,702,779	4,015,983	191,587	11,910,349

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Therefore, the information presented in this report is based on ACO Report No. 34.**Table 69.** Cassava balance sheet of ASEAN countries in 2026 (cassava fresh root).

Unit: Ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	16,561,166	77,733,848	9,444,074	103,739,087	50,051,076	33,036,478	20,651,533	103,739,087
Brunei	0	353	0	353	353	0	0	353
Cambodia ^{a/}	12,906,371	14,986,702	0	27,893,073	9,008,638*	3,000,000*	15,884,435	27,893,073
Indonesia	0	17,040,285	608,781	17,649,066	17,557,895	91,171	0	17,649,066
Lao PDR	280,865	6,246,500	61,816	6,589,181	3,245,937	3,216,060	127,183	6,589,181
Malaysia	0	45,406	5,941*	51,347	50,520*	827*	0	51,347
Myanmar	1,216,035	367,031*	0	1,583,066	242,558*	29,179*	1,311,329	1,583,066
Philippines	0	2,525,051*	160,000*	2,685,051	2,683,751*	1,300*	0	2,685,051
Singapore	0	0	1,619	1,619	1,618	1	0	1,619
Thailand	1,966,308	25,562,946	8,400,000*	35,929,254	9,480,000*	23,500,000*	2,949,254	35,929,254
Vietnam	191,587	10,959,574	205,917	11,357,078	7,779,806	3,197,940	379,332	11,357,078

Remark: * is noted that the value is estimated by the AFSIS Secretariat.a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions.
Therefore, the information presented in this report is based on ACO Report No. 34.

Table 70. Ratio of cassava production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	81,696,102.60	52,143,000.82	156.68	78,993,782.42	49,529,052.81	159.49	77,733,847.66	50,051,075.76	155.31
Brunei	425.28	425.28	100.00	335.83	335.83	100.00	352.63	352.63	100.00
Cambodia ^{a/}	15,560,580.33	9,163,001.00	169.82	15,298,441.20	9,008,637.79*	169.82	14,986,702.00	9,008,637.79*	166.36
Indonesia	16,705,832.00	17,711,186.00	94.32	15,702,143.00	16,255,396.00	96.60	17,040,285.00	17,557,895.00	97.05
Lao PDR	7,402,000.00	4,004,485.44	184.84	7,482,000.00	3,602,860.69	207.67	6,246,500.00	3,245,937.34	192.44
Malaysia	41,341.21	47,262.78	87.47	44,867.62	49,090.00	91.40	45,406.03	50,520.00*	89.88
Myanmar	366,110.00	198,536.00	184.40	366,569.00	231,918.00	158.06	367,031.00*	242,558.00*	151.32
Philippines	2,461,501.78	2,589,901.78*	95.04	2,377,011.00	2,476,489.00*	95.98	2,525,051.00*	2,683,751.00*	94.09
Singapore	0.00	1,689.54	0.00	0.00	1,546.50	0.00	0.00	1,618.00	0.00
Thailand	28,624,312.00	10,800,000.00	265.04	26,977,734.77	10,200,000.00	264.49	25,562,946.00	9,480,000.00	269.65
Vietnam	10,534,000.00	7,626,513.00	138.12	10,744,680.00	7,702,779.00	139.49	10,959,574.00	7,779,806.00	140.87

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions.

Therefore, the information presented in this report is based on ACO Report No. 34.

Table 71. Ratio of cassava beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026.

Unit: Ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	9,624,161.45	52,143,000.82	18.46	17,304,064.39	49,529,052.81	34.94	16,561,165.59	50,051,075.76	33.09
Brunei	0.00	425.28	0.00	0.00	335.83	0.00	0.00	352.63	0.00
Cambodia ^{a/}	7,078,270.00	9,163,001.00	77.25	9,616,567.33	9,008,637.79*	106.75	12,906,370.74	9,008,637.79*	143.27
Indonesia	0.00	17,711,186.00	0.00	0.00	16,255,396.00	0.00	0.00	17,557,895.00	0.00
Lao PDR	32,824.00	4,004,485.44	0.82	1,107,310.61	3,602,860.69	30.73	280,864.64	3,245,937.34	8.65
Malaysia	0.00	47,262.78	0.00	0.00	49,090.00	0.00	0.00	50,520.00*	0.00
Myanmar	963,363.00	198,536.00	485.23	1,101,732.00	231,918.00	475.05	1,216,035.00	242,558.00*	501.34
Philippines	0.00	2,589,901.78*	0.00	0.00	2,476,489.00*	0.00	0.00	2,683,751.00*	0.00
Singapore	0.00	1,689.54	0.00	0.00	1,546.50	0.00	0.00	1,618.00	0.00
Thailand	1,164,261.00	10,800,000.00	10.78	4,588,573.00	10,200,000.00	44.99	1,966,307.77	9,480,000.00	20.74
Vietnam	385,443.45	7,626,513.00	5.05	889,881.45	7,702,779.00	11.55	191,587.45	7,779,806.00	2.46

Remark: * is noted that the value is estimated by the AFSIS Secretariat.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions.

Therefore, the information presented in this report is based on ACO Report No. 34.

Table 72. Quantity and value of cassava exports by countries of destination in 2025.

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	Thailand	413,288	30,996,563	1,653,150	120,266,663	-	-	1,653,150	120,266,663
	Vietnam	1,239,863	89,270,100						
Indonesia	Brunei	12	10,585	10,099	3,924,616	17,876	9,699,420	27,974	13,624,037
	Malaysia	3,713	1,255,036						
	Philippines	6,361	2,643,848						
	Singapore	9	11,717						
	Thailand	3	3,429						
	Vietnam	0.0030	2						
Lao PDR	Thailand	3,720,874	186,792,455	4,230,275	219,962,034	526,663	55,229,636	4,756,939	275,191,670
	Vietnam	509,402	33,169,579						
Malaysia	Singapore	516	257,338	516	257,338	43	143,083	559	400,421
Myanmar	Malaysia	1,617	544,000	21,811	3,549,000	-	-	21,811	4
	Thailand	20,194	3,005,000						
Philippines	Singapore	17	34,373	17	34,373	1,294	1,500,669	1,311	1,535,042
Singapore	-	-	-	-	-	-	-	-	-
Thailand	Brunei	1,223	213,477	2,466,101	265,714,576	9,634,104	8,304,648	868,782,159	274,019,224
	Cambodia	4,234	810,696						
	Indonesia	762,464	79,725,789						
	Lao PDR	178,490	16,294,242						
	Malaysia	783,294	77,475,729						
	Myanmar	24,327	3,111,374						
	Philippines	379,367	47,647,696						
	Singapore	273,645	29,155,470						
	Vietnam	59,057	11,280,103						
Vietnam	Malaysia	23,024	8,816,009	45,020	16,403,176	3,301,632	1,020,096,946	3,346,652	1,036,500,122
	Philippines	21,996	7,587,167						

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 73. Quantity and value of cassava imports by countries of origin in 2025.

Exporting country	Country of destination	Quantity (ton)	Value (US\$)	Total within ASEAN		Total outside ASEAN		Total	
				Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)	Quantity (ton)	Value (US\$)
Brunei	-	-	-	-	-	-	-	-	-
Cambodia ^{a/}	-	-	-	-	-	-	-	-	-
Indonesia	Malaysia	12	6,216	185,480	71,813,791	356	147,389	185,835	71,961,180
	Thailand	182,931	70,831,438						
	Vietnam	2,537	976,137						
Lao PDR	Thailand	51,353	5,888,625	51,353	5,888,625	-	-	51,353	5,888,625
Malaysia	Indonesia	21	22,485	595	378,953	2,915	3,994,968	3,510	4,373,921
	Myanmar	243	100,849						
	Thailand	4	1,857						
	Vietnam	326	253,761						
Myanmar	Thailand	1,463	901,000	1,463	901,000	-	-	1,463	901,000
Philippines	Cambodia	239	109,286	100,782	47,655,220	7	14,706	100,789	47,669,926
	Indonesia	6,259	2,812,634						
	Thailand	78,544	38,707,662						
	Vietnam	15,740	6,025,638						
Singapore	Indonesia	6	102,254	1,544	1,414,903	3	83,995	1,547	1,498,898
	Malaysia	1,532	1,201,921						
	Thailand	6	110,729						
Thailand	Cambodia	1,547,753	107,014,221	7,692,466	533,698,081	75,100	42,754,871	7,767,566	576,452,951
	Indonesia	1,453	472,023						
	Lao PDR	6,097,997	421,405,202						
	Malaysia	262	275,384						
	Myanmar	39,075	2,733,948						
	Philippines	0.039	85						
	Singapore	19	804,110						
	Vietnam	5,907	993,107						
Vietnam	Indonesia	-	121,853	-	45,490,209	-	4,335,171	-	49,825,380
	Lao PDR	-	44,502,340						
	Singapore	-	63,000						
	Thailand	-	803,016						

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 74. FOB prices of cassava in selected ASEAN countries.

Unit: US\$/Ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cambodia ^{a/}	Starch	2024	585	580	485	457	520	580	576	580	575	581	521	599	553
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
	Shredded	2024	230	258	233	244	230	249	245	240	246	270	275	273	249
		2025	-	-	-	-	-	-	-	-	-	-	-	-	-
	Pellets	2024	145	145	145	145	145	145	150	148	148	149	149	150	147
Indonesia	Starch - HS-code 07141011	2025	149	149	150	151	151	152	-	-	-	-	-	-	150
		2024	1,938	1,844	1,423	1,867	2,298	1,867	1,743	1,648	1,671	1,738	1,518	1,421	1,748
Lao PDR	Starch	2025	2,086	1,773	1,862	829	1,030	1,997	1,346	1,406	1,388	-	-	-	1,524
		2024	403	344	356	480	459	451	472	404	479	349	443	483	427
	Shredded	2025	372	358	326	309	342	324	364	317	388	407	-	-	351
		2024	159	162	195	182	144	158	219	144	135	132	136	156	160
	Pellets	2025	153	144	145	143	145	145	140	132	-	-	-	-	143
Malaysia	Pellets - HS-code 0714101100	2024	n/a	n/a	n/a	n/a	n/a	n/a	n/a	89	90	88	66	78	82
		2025	78	56	55	64	68	79	87	68	-	-	-	-	69
	Pellets - HS-code 0714101900	2024	0	5,909	0	4,196	0	3,079	0	0	0	1,267	2,414	0	1,405
		2025	0	4,761	0	0	0	6,954	3,099	0	0	-	-	-	1,646
	Pellets - HS-code 0714101900	2024	0	0	0	0	0	1,978	0	0	0	2,201	15,509	0	1,641
Myanmar	Pellets - HS-code 0714109900	2025	0	0	0	0	0	0	0	0	0	-	-	-	0
		2024	270	374	392	436	328	512	224	429	508	554	470	476	414
	Pellets - HS-code 0714109100	2025	495	493	0	358	366	505	586	512	571	-	-	-	432
		2024	0	0	0	0	0	0	0	0	0	0	1,847	0	154
	Pellets - HS-code 0714109100	2025	0	0	0	0	0	0	0	0	0	-	-	-	0
Philippines	Starch	2024	333	333	400	333	333	0	333	333	333	0	0	0	341
		2025	351	154	147	143	171	160	186	213	-	-	-	-	191
	Shredded	2024	0	0	0	2,549	0	0	0	0	0	0	0	1,849	2,199
		2025	0	694	0	0	1,034	0	999	1,125	0	0	0	0	963
	Pellets	2024	1,160	1,025	1,208	1,114	1,099	1,161	1,168	1,262	1,198	961	1,316	1,212	1,157
Thailand	Starch	2025	1,149	1,138	1,169	1,024	1,175	1,024	1,224	1,164	1,210	-	-	-	1,142
		2024	0	0	0	0	0	0	0	0	0	0	0	0	0
	Shredded	2025	0	1,049	2,240	1,937	1,555	1,178	1,990	1,531	1,144	-	-	-	1,578
		2024	576	573	573	568	551	542	521	520	512	484	467	445	528
	Pellets	2025	415	420	418	406	416	426	436	440	440	441	443	-	427
Vietnam	Shredded	2024	257	250	252	240	230	234	243	243	242	236	215	195	236
		2025	185	185	185	185	191	211	255	224	215	213	213	-	205
	Pellets	2024	357	359	301	358	313	267	313	300	260	284	337	334	315
		2025	344	198	200	193	279	204	202	205	208	-	-	-	226
	Not specified	2024	462	448	451	440	439	481	483	453	469	432	393	365	443
		2025	336	314	285	288	300	313	313	307	331	336	-	-	312

Remark: - is noted that the value is **Not Applicable**.

a/ is referred that the current information for Cambodia is not available at this time due to the absence of updated submissions. Therefore, the information presented in this report is based on ACO Report No. 34.

Table 75. CIF prices of cassava in selected ASEAN countries.

Unit: US\$/Ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Starch - HS-code 07141011	2024	0	0	299	295	294	294	0	0	289	289	289	0	293
		2025	0	0	0	0	0	0	19,667	-	-	-	-	-	19,667
Lao PDR	Starch	2024	491	563	512	469	475	400	504	484	434	471	466	489	480
		2025	419	369	365	368	0	0	0	0	0	0	-	-	152
	Shredded	2024	178	173	196	170	0	0	0	0	0	0	0	0	60
		2025	145	0	0	0	0	0	0	0	0	0	-	-	15
Malaysia	Pellets - HS-code 0714101100	2024	0	2,690	403	420	414	0	0	0	0	385	0	0	359
		2025	0	346	0	0	0	592	295	0	0	-	-	-	137
	Pellets - HS-code 0714101900	2024	0	0	0	0	0	1,494	404	0	0	1,497	411	398	350
		2025	452	0	348	0	0	0	0	0	0	-	-	-	89
	Pellets - HS-code 0714109900	2024	1,049	1,170	1,200	1,206	1,320	1,338	1,145	1,550	1,172	1,189	1,198	1,117	1,221
		2025	1,133	1,199	0	0	1,278	1,479	1,682	1,588	1,369	-	-	-	1,081
Myanmar	Starch	2024	0	0	0	0	0	0	0	0	0	0	0	0	0
Philippines	Starch	2025	0	617	515	515	516	588	515	459	515	-	-	-	530
		2024	590	537	576	586	551	530	515	552	550	489	477	504	538
Singapore	Not specified	2025	555	463	467	462	451	455	483	474	450	-	-	-	473
		2024	371	334	360	369	339	406	560	548	525	536	523	344	435
		2025	337	365	373	337	364	388	474	432	379	488	386	403	394

Remark: - is noted that the value is **Not Applicable**.

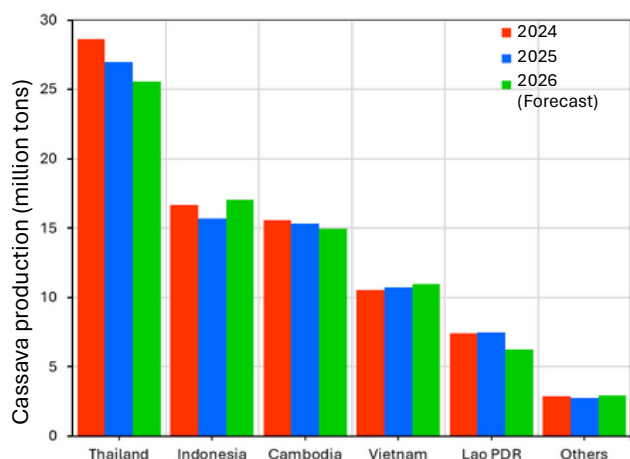


Figure 61. Cassava production of selected countries in ASEAN from 2024 to 2026.

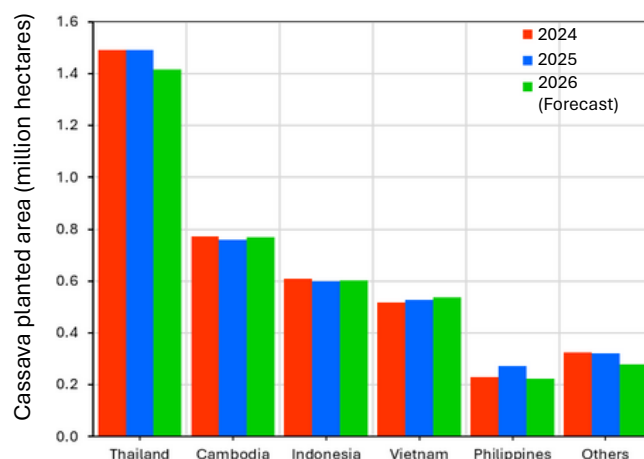


Figure 62. Cassava planted area of selected countries in ASEAN from 2024 to 2026.

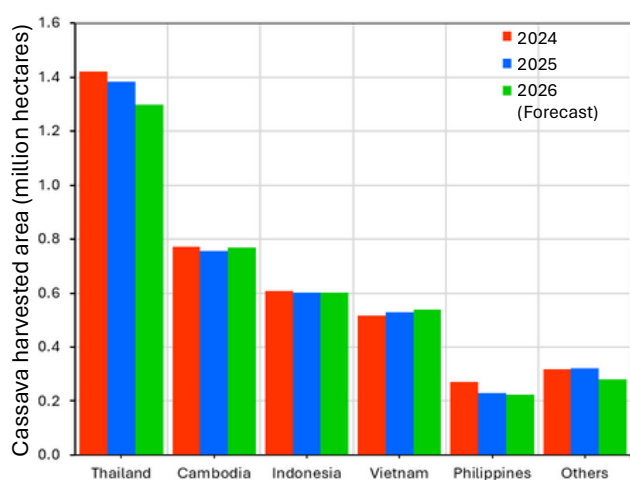


Figure 63. Cassava harvested area of selected countries in ASEAN from 2024 to 2026.

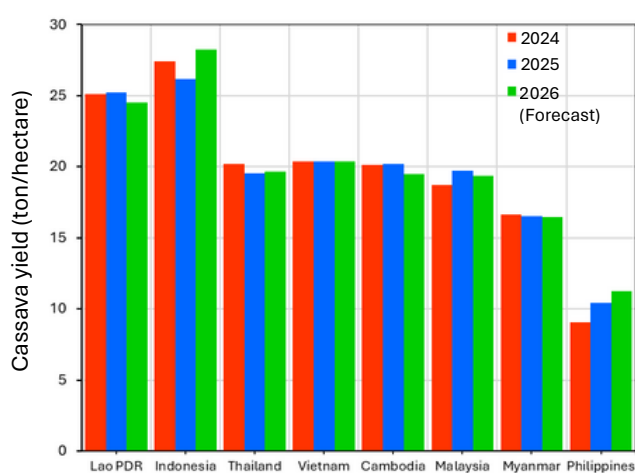


Figure 64. Cassava yield of selected countries in ASEAN from 2024 to 2026.

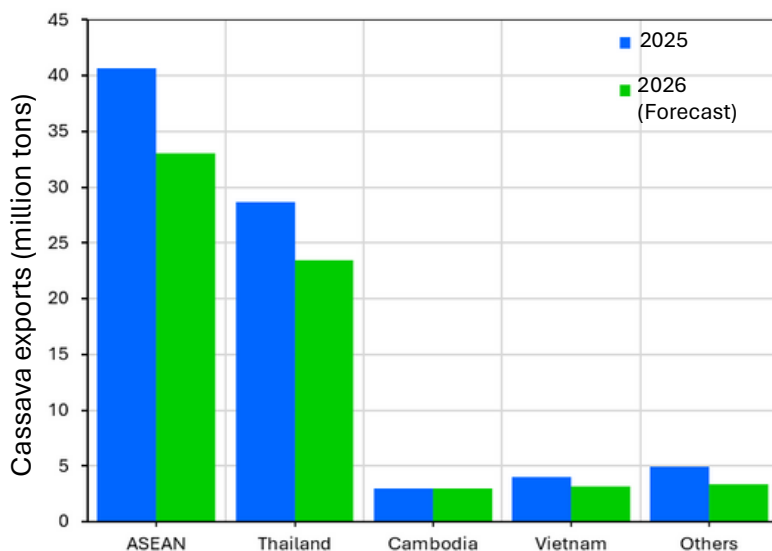


Figure 65. Amount of cassava exports of selected countries in ASEAN from 2025 to 2026.

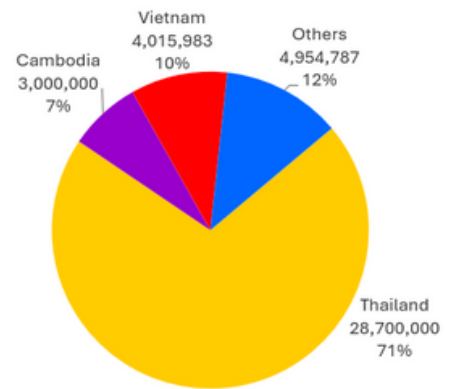


Figure 66. Share of cassava exports (tons) among ASEAN countries in 2025, totaling 40.67 million tons.

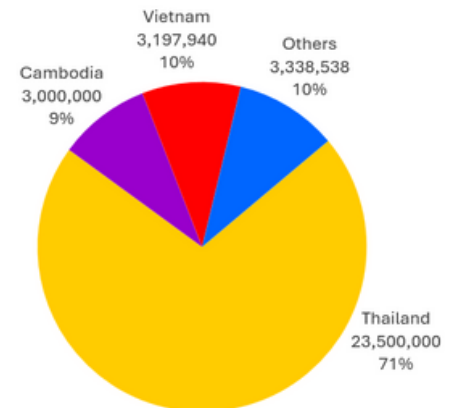


Figure 67. Share of cassava exports (tons) among ASEAN countries in 2026, totaling 33.04 million tons.

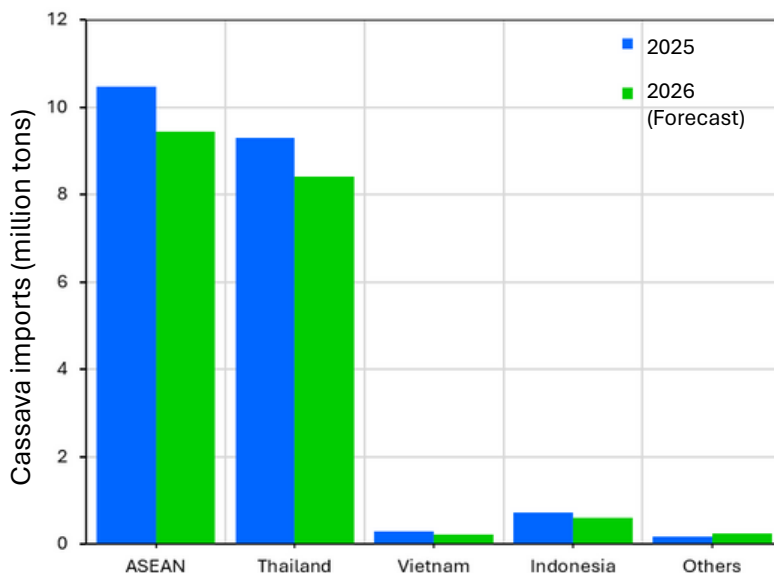


Figure 68. Amount of cassava imports of selected countries in ASEAN from 2025 to 2026.

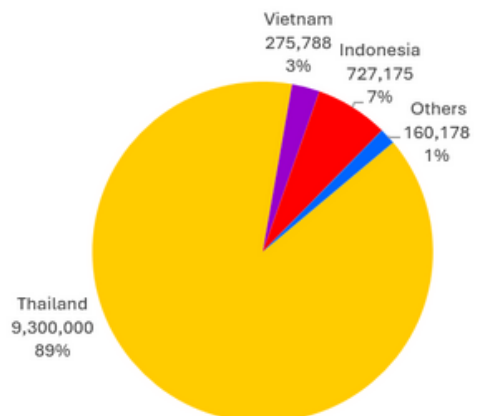


Figure 69. Share of cassava imports (tons) among ASEAN countries in 2025, totaling 10.46 million tons.

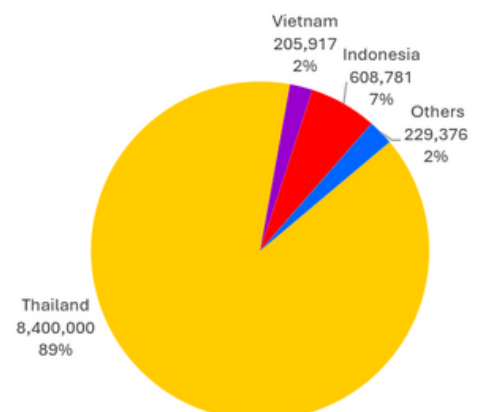


Figure 70. Share of cassava imports (tons) among ASEAN countries in 2026, totaling 9.44 million tons.

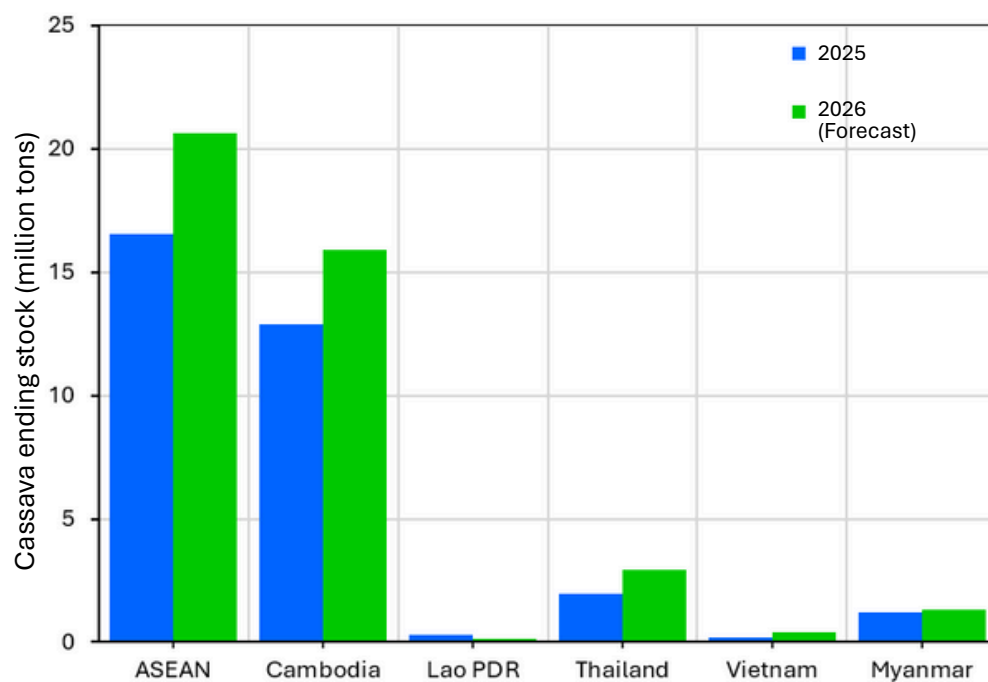


Figure 71. Amount of ending stock of cassava in ASEAN from 2025 to 2026.

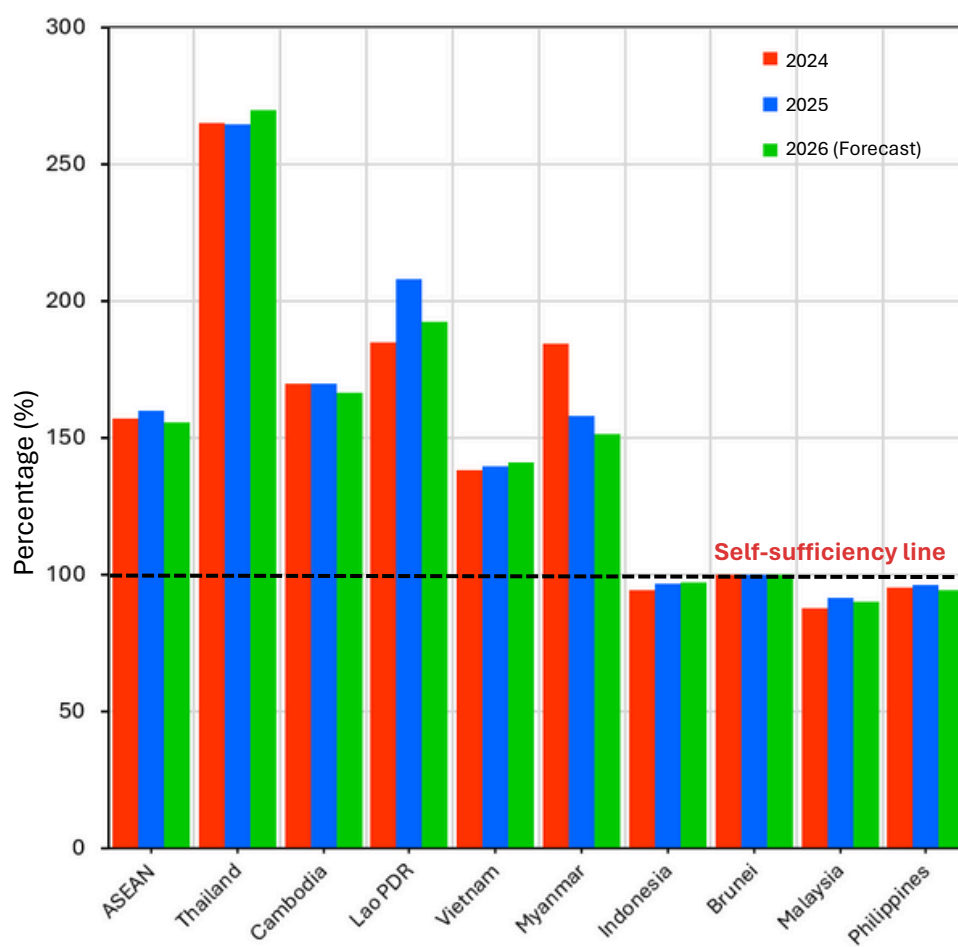


Figure 72. Ratio of cassava production to domestic utilization in ASEAN from 2024 to 2026.

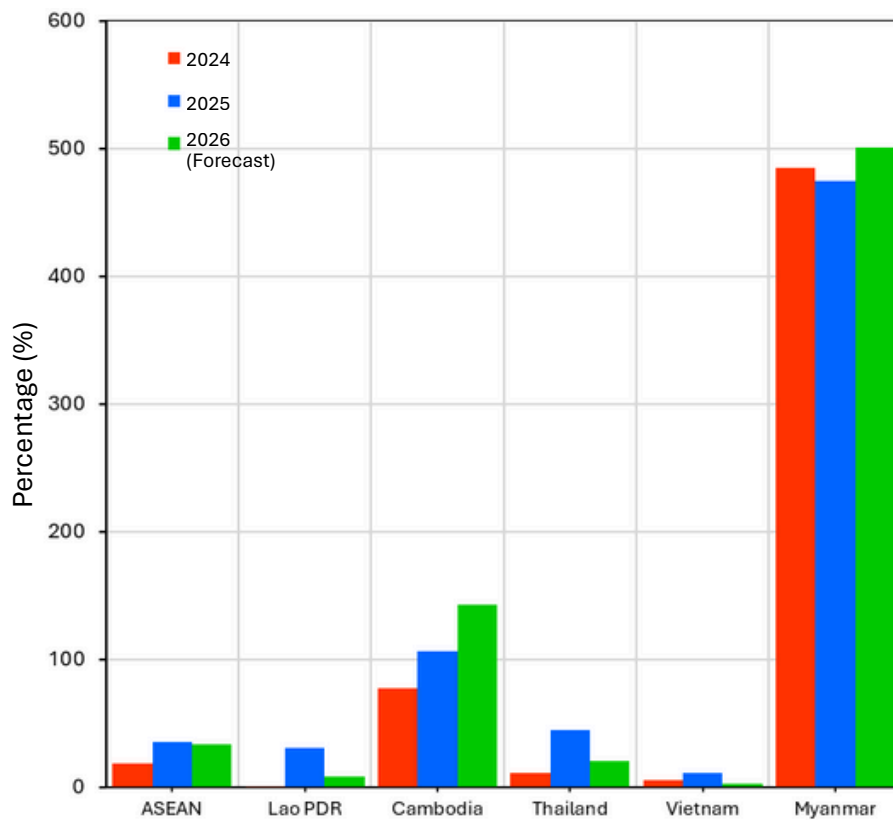


Figure 73. Ratio of cassava beginning stock to domestic utilization in ASEAN from 2024 to 2026.

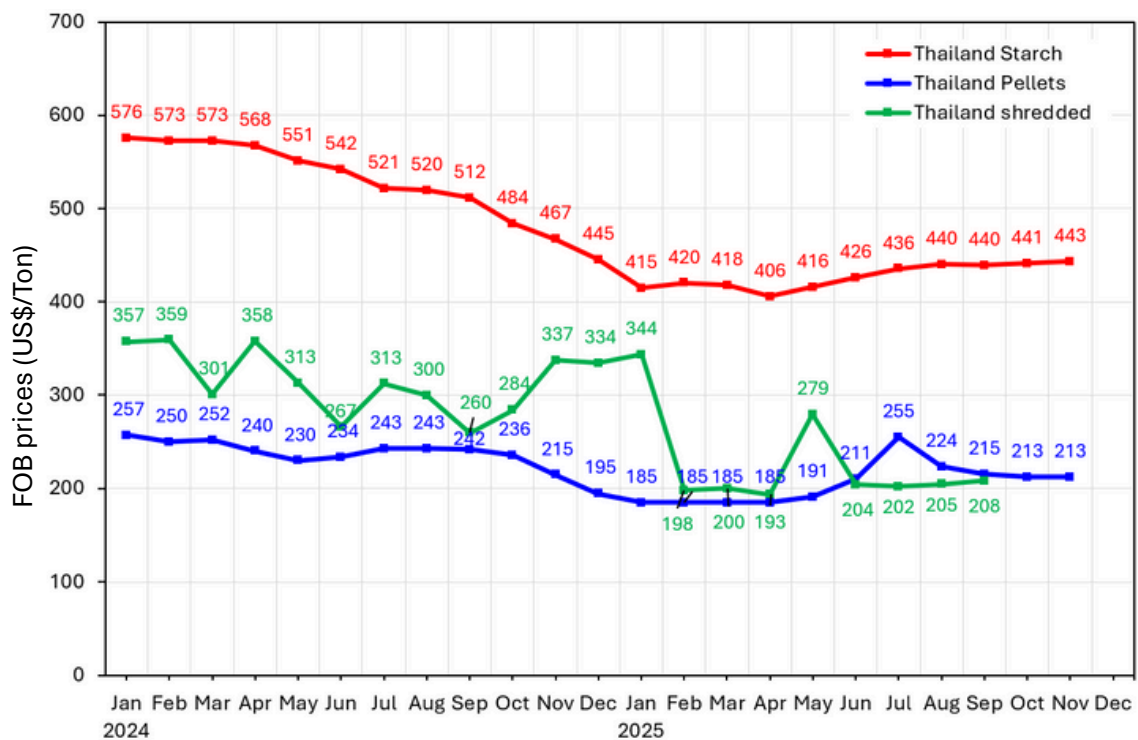


Figure 74. FOB prices (US\$/ton) of cassava of selected countries in ASEAN from 2024 to 2025.

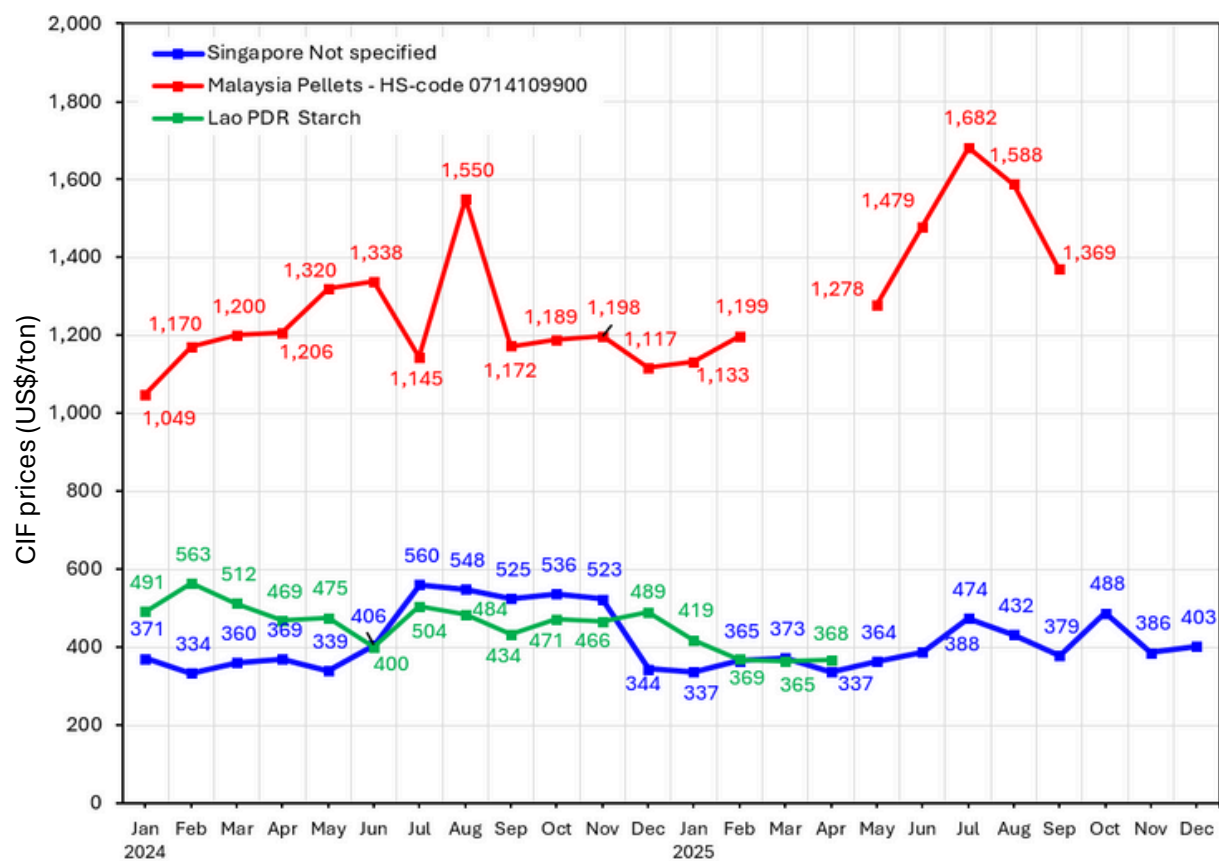


Figure 75. CIF prices (US\$/ton) of cassava of selected countries in ASEAN from 2024 to 2025.

Explanatory Notes

Production of Paddy for 2025 (crop year 2024/2025)

Brunei Darussalam

- Wet season refers to the crop harvested from January to May 2025.
- Dry season refers to the crop harvested from July to November 2025.

Cambodia

- Wet season refers to the crop harvested from August to December 2024.
- Dry season refers to the crop harvested from January to April 2025.

Indonesia

- Wet season refers to the crop harvested from September 2024 to February 2025.
- Dry season refers to the crop harvested from May to August 2025.

Lao PDR

- Wet season refers to the crop harvested from September to December 2024.
- Dry season refers to the crop harvested from March to May 2025.

Malaysia

- Wet season refers to the crop harvested from September 2024 to February 2025.
- Dry season refers to the crop harvested from March to August 2025.

Myanmar

- Wet season refers to the crop harvested from August 2024 to February 2025.
- Dry season refers to the crop harvested from February to April 2025.

The Philippines

- Wet season refers to the crop harvested from July to December 2024.
- Dry season refers to the crop harvested from January to March 2025.

Thailand

- Wet season refers to the crop harvested from July 2024 to May 2025.
- Dry season refers to the crop harvested from February to September 2024.

Vietnam

- Spring season
 - North region refers to the crop harvested from May to July 2025.
 - South region refers to the crop harvested from February to May 2025.
- Autumn season
 - North region refers to the crop harvested from August to October 2025.
 - South region refers to the crop harvested from July to September 2025.
- Winter season
 - North region refers to the crop harvested from October to November 2025.
 - South region refers to the crop harvested from October to December 2025.

Production of Maize for 2025 (crop year 2024/2025)

Brunei Darussalam

- Wet season refers to the crop harvested from January to June 2025.
- Dry season refers to the crop harvested from July to December 2025.

Cambodia

- Wet season refers to the crop harvested from October to November 2025.
- Dry season refers to the crop harvested from June to July 2025.

Indonesia

- 1st crop harvested from January to April 2025.
- 2nd crop harvested from May to August 2025.
- 3rd crop harvested from September to December 2025.

Lao PDR

- Wet season refers to the crop harvested from September to December 2025.
- Dry season refers to the crop harvested from March to May 2025.

Malaysia

- Dry season refers to the crop harvested during May 2025.

Myanmar

- Wet season refers to the crop harvested from August 2024 to January 2025.
- Dry season refers to the crop harvested from January to April 2025.

The Philippines

- Wet season refers to the crop harvested from August to December 2024.
- Dry season refers to the crop harvested from January to March 2025.

Thailand

- Wet season refers to the crop harvested from July 2024 to January 2025.
- Dry season refers to the crop harvested from February to May 2025.

Vietnam

- 1st crop harvested from February to June 2025.
- 2nd crop harvested from October to November 2025.

Production of Sugarcane for 2025 (crop year 2024/2025)

Brunei Darussalam

- The crop harvested from January to December 2025.

Cambodia

- The crop harvested from October to December 2024.

Indonesia

- The crop harvested from September 2024 to December 2025.

Lao PDR

- The crop harvested from January to May 2025.

Myanmar

- The crop harvested from November 2024 to March 2025.

The Philippines

- The crop harvested from October 2024 to May 2025.

Thailand

- The crop harvested from December 2024 to May 2025.

Vietnam

- The crop harvested from November 2024 to May 2025.

Production of Soybean for 2025 (crop year 2024/2025)

Cambodia

- Wet season refers to the crop harvested from January to February 2025.
- Dry season refers to the crop harvested from October to December 2025.

Indonesia

- 1st crop harvested from January to April 2025.
- 2nd crop harvested from May to August 2025.
- 3rd crop harvested from September to December 2025.

Lao PDR

- Wet season refers to the crop harvested from September to November 2024.
- Dry season refers to the crop harvested from January to April 2025.

Myanmar

- Wet season refers to the crop harvested from August 2024 to January 2025.
- Dry season refers to the crop harvested from January to April 2025.

The Philippines

- Wet season refers to the crop harvested from August to December 2024.
- Dry season refers to the crop harvested from January to June 2025.

Thailand

- Wet season refers to the crop harvested from August to December 2024.
- Dry season refers to the crop harvested from January to May 2025.

Vietnam

- Wet season refers to the crop harvested from February to May 2025.
- Dry season refers to the crop harvested from August to November 2025.

Production of Cassava for 2025 (crop year 2024/2025)

Brunei Darussalam

- The crop harvested from August 2024 to December 2025.

Cambodia

- The crop harvested from January to February 2025.

Indonesia

- 1st crop harvested from January to April 2025.
- 2nd crop harvested from May to August 2025.
- 3rd crop harvested from September to December 2025.

Lao PDR

- The crop harvested from December 2024 to March 2025.

Malaysia

- The crop harvested from October 2024 to December 2025.

Myanmar

- The crop harvested from September 2024 to June 2025.

The Philippines

- 1st crop harvested from August to December 2024.
- 2nd crop harvested from January to June 2025.

Thailand

- The crop harvested from October 2024 to September 2025.

Vietnam

- Wet season refers to the crop harvested from February to May 2025.
- Dry season refers to the crop harvested from January to March 2025.
- Domestic utilization, stock, import, and export refer to a calendar year.
- N/A noted that the data is not available due to no collecting or reporting systems in the country yet.
- Nil indicates as a small amount.

Milling Rate of Rice (2025)

Country	Paddy (Ton)	Milling rate (%)
ASEAN	1	64
Brunei	1	65
Cambodia	1	64
Indonesia	1	64
Lao PDR	1	60
Malaysia	1	64
Myanmar	1	63
Philippines	1	67
Thailand	1	65
Vietnam	1	65

Extraction Rate of Sugar (2025)

Country	Sugarcane (Ton)	Extraction rate (%)
ASEAN	1,000	109
Cambodia	1,000	100
Indonesia	1,000	95
Lao PDR	1,000	200
Myanmar	1,000	80
Philippines	1,000	80
Thailand	1,000	107
Vietnam	1,000	100

ANNEX 1

Rice crop calendar (harvested month) for crop year 2024/2025 (2025) in ACO No. 35 report

Country	Season	2024						2025												2026	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet																				
	Dry																				
Cambodia	Wet																				
	Dry																				
Indonesia	Wet																				
	Dry																				
Lao PDR	Wet																				
	Dry																				
Malaysia	Wet																				
	Dry																				
Myanmar	Wet																				
	Dry																				
Philippines	Wet																				
	Dry																				
Thailand	Wet																				
	Dry																				
Vietnam	Spring - North																				
	Spring - South																				
	Autumn - North																				
	Autumn - South																				
	Winter - North																				
	Winter - South																				

ANNEX 2

Maize crop calendar (harvested month) for crop year 2024/2025 (2025) in ACO No. 35 report

Country	Season/Crop	2024						2025												2026	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet																				
	Dry																				
Cambodia	Wet																				
	Dry																				
Indonesia	1 st																				
	2 nd																				
	3 rd																				
Lao PDR	Wet																				
	Dry																				
Malaysia	Wet																				
	Dry																				
Myanmar	Wet																				
	Dry																				
Philippines	Wet																				
	Dry																				
Thailand	Wet																				
	Dry																				
Vietnam	1 st																				
	2 nd																				

ANNEX 3

Sugarcane crop calendar (harvested month) for crop year 2024/2025 (2025) in ACO No. 35 report

Country	2024				2025											
	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 month) for crop year 2024/2025 (2025) in ACO No. 35 report

Country	Season/Crop	2024					2025											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cambodia	Wet																	
	Dry																	
Indonesia	1 st																	
	2 nd																	
	3 rd																	
Lao PDR	Wet																	
	Dry																	
Myanmar	Wet																	
	Dry																	
Philippines	Wet																	
	Dry																	
Thailand	Wet																	
	Dry																	
Vietnam	Wet																	
	Dry																	

ANNEX 5

Cassava crop calendar (harvested month) for crop year 2024/2025 (2025) in ACO No. 35 report

Country	Crop	2024					2025											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei	-																	
Cambodia	-																	
Indonesia	1 st																	
	2 nd																	
	3 rd																	
Lao PDR	-																	
Malaysia	-																	
Myanmar	-																	
Philippines	1 st																	
	2 nd																	
Thailand	-																	
Vietnam	North																	
	South																	



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