WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

No. 443
12 - 18 November 2025

Brunei

Brunei Expands Rice Milling Capacity as Wasan Milling Company (WMC) Doubles Capacity. Brunei's national rice milling facility capacity has more than doubled following the successful upgrade, which includes a new milling line along with four vertical dryers, three 850-tonne silos, and an automated vacuum seal packaging system. The upgrades add 7 tonnes of hourly milling capacity, increasing WMC's output to 7,920 metric tonnes per year, equivalent to approximately 38 percent of national demand. WMC's new vacuum-sealed packaging is expected to extend the shelf life of locally milled rice.

Source: Biz Brunei. (2025, November 13). *Wasan Milling Company more than doubles national milling capacity*.

Brunei Aims for 20 percent Rice Self-Sufficiency by 2027. Brunei has set a target to raise rice self-sufficiency to 20 percent by 2027, up from 8 percent in 2024, as part of the six key national efforts to strengthen food security and reduce import dependence. Wasan Milling Company (WMC), the country's sole commercial rice miller and a government-owned entity under Darussalam Assets, will play a key role by supporting local farmers by processing their paddy into rice for sale to the local market. Moreover, WMC has boosted mechanisation and adopted new technologies, including AI pest monitoring and drone-based precision farming.

Source: Biz Brunei. (2025, November 13). *Wasan Milling Company more than doubles national milling capacity*.

Thailand

Thailand's rice sector is losing its global competitiveness due to a decline in production. Thailand's rice sector is facing renewed crisis, with yields per rai falling, production costs rising, and both domestic and export prices plunging — the latter to a 15-year low. Analysts say these trends reflect a sharp decline in the country's global competitiveness. Moreover, a Senior Fellow at the Knowledge Network Institute of Thailand warns that 14 years of recurring government policies, including rice-pledging, income guarantees, and per-rai subsidies, have cost over 1.2 trillion THB while trapping farmers in a cycle of dependence. These measures have discouraged technological upgrades and productivity improvements.

Source: Nation Thailand. (2025, November 14). *Thai rice sector in crisis as yields fall, costs rise and export prices hit 15-year low.*

Thai rice prices decline while costs rise. Thai rice farmers are facing sharply falling paddy prices, with common white paddy dropping from just over 10,000 THB (308.02 USD) per tonne last year to below 8,000 THB (246.42 USD), and high-moisture freshly harvested paddy selling for only 5,000 – 6,000 THB (154.01 – 184.81 USD), which is below the production costs. Thailand's average production cost of 7,200 – 7,500 THB (221.78 – 231.02 USD) per tonne is significantly higher than Vietnam's and India's. As a result, many farmers are now breaking even or losing money, with only those using improved varieties and modern techniques able to survive. and farming has become high-risk and increasingly fragile, trapping Thai households in middle-income stagnation.

*1 USD = 32.47 THB

Source: Nation Thailand. (2025, November 14). *Thai rice sector in crisis as yields fall, costs rise and export prices hit 15-year low.*

Gathered by the APTERR Secretariat
Tel: +66 (0) 2579 4816-17 Fax: +66 (0) 2579 4840
Email: phattaranan.jir@apterr.org
Website: http://www.apterr.org/