



WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

No. 444

19 - 25 November 2025

Indonesia

Indonesia announced a ban on rice imports due to production volume. The President of Indonesia has officially banned rice imports, citing national rice reserves and rising domestic production. According to the Ministry of Agriculture, the country expects to produce 34.8 million tonnes of rice in 2026, making imports unnecessary, and the government also blocks any attempts to import rice through illegal channels. Moreover, the announcement has already affected the global rice market. Viet Nam and Thailand rice prices have declined in response to reduced demand from Indonesia, which is one of the world's largest rice importers.

Source: AzerNews. (2025, November 25). Indonesia stops rice imports.

Thailand

Main crop paddy increases sharply, reaching its highest level in 2025. According to the Department of Internal Trade (DIT), the price for main-crop paddy from 2025/26 increases, aligning with the government's strategy to support key agricultural commodities, especially rice, which remains a critical source of income for farmers nationwide. Following the National Rice Policy and Management Committee meeting on November 18, measures were launched to absorb excess paddy ahead of the harvest peak at year-end. These include rice-stock pledging, delayed-sale schemes, warehouse-deposit programmes, and a nationwide paddy trade-fair initiative. Moreover, DIT and provincial commerce were launched on 10 November 2025, covering the North,

Northeast, and Central regions. The fairs aim to enable direct purchases by millers and buyers from outside farming areas, thereby reducing transport costs, expanding sales channels, and resolving localised problems where buyers are scarce

Source: Nation Thailand. (2025, November 21). Thai rice market surges as jasmine rice hits 16,100 baht per tonne.

Viet Nam

Viet Nam continues to be one of the world's top rice exporters.

According to the Viet Nam Food Association (VFA), Vietnam has exported 7 million tonnes of rice, and the overall export value is expected to reach 8 million tonnes for the year. Vietnam's rice exports have maintained robust growth, helping the country remain among the world's leading exporters alongside India and Thailand. However, compared to 2024, Viet Nam's rice export volume has declined by 1 million tonnes due to the Philippines' rice import suspension, as the Philippines accounted for 40 percent of Viet Nam's total rice exports. If this situation continues into the winter-spring crop, both enterprises and farmers will face significant pressure. However, even with the Philippines halting imports, Vietnam has maintained rice exports of nearly 500,000 tonnes per month. This demonstrates the flexible adaptability of enterprises in expanding their markets. Many new markets, such as Africa, China, and Japan, are emerging as bright spots. On the international front, Viet Nam's rice sector faces pressure from the Philippines and Indonesia, which are two of its largest export markets, move toward food self-sufficiency. These challenges encourage Viet Nam to diversify the rice export market and improve the quality and value of its rice.

Source: Agrideco Vietnam Co., Ltd. (2025, November 21). Vietnam's rice continues to affirm its position as a leading global export.

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/>

* This Weekly Update on ASEAN Plus Three Rice Situations is based on all available sources during the period and may be missing some important facts. The APTERR Secretariat shall take no responsibility for data accuracy in this publication and any consequence of their use.