



WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

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damaged rice crops, while rising fuel and fertilizer costs have increased production expenses, reducing farmers' profitability. Some farmers have been forced to seek additional income or adopt water-saving practices due to limited irrigation and high input costs. In addition, the Vietnamese government has cautioned that severe El Niño conditions could affect more than 350,000 hectares of rice fields. Concerns over tighter regional supply have also supported higher rice prices, with analysts expecting prices to remain firm over the next 12 – 18 months as weather risks and production costs continue to weigh on output.

Source: The Star. (2026, July 27). *El Nino worsens the plight of Asia's rice belt*.

Indonesia

Indonesia's Rice Production Faces Pressure as El Niño Prolongs Dry Season

Indonesia's rice sector is expected to face increasing pressure in the second half of 2026 as El Niño prolongs the dry season, reducing rainfall, worsening water shortages, and lowering rice yields. According to the Statistics Indonesia (BPS), rice production declined for three consecutive months from March to May 2026, with April output falling by more than 800,000 MT year-on-year. Researchers expect production losses to worsen in the second half of the year due to intensifying drought. Despite these concerns, President Prabowo Subianto said Indonesia achieved rice self-sufficiency in 2025, with production reaching 34.71 million MT, exceeding domestic consumption of 31.19 million MT. The Agriculture Ministry added that irrigation pump deployment is being expanded and national rice reserves remain sufficient to meet demand until 2027.

Source: Asia News Network. (2026, July 28). *Crop failures threaten Indonesia as dry season drags on*.

Viet Nam

Vietnam's Rice Sector Faces El Niño and Rising Input Costs

Vietnam's rice sector is facing growing pressure from a strengthening El Niño, which has prolonged dry weather and threatened production in key growing areas. In central Vietnam, two months of drought have

Japan

Japan's Domestic Rice Consumption Falls to Record Low

According to the preliminary data, Japan's domestic rice consumption for staple food fell to a record low of 6.83 million MT (brown rice basis) in the year from July 2025. The decline was driven by increased purchases of lower-priced imported rice as consumers sought alternatives following sharp rises in domestic rice prices caused by severe shortages in 2024. In addition, in September 2025, the Ministry of Agriculture estimated demand for domestic rice as a staple food for the one-year period at 6.97 – 7.11 million MT. The projection was decreased to 6.91 – 7.04 million MT, highlighting that the government's estimates continued to overstate demand. The discrepancy follows the rice market disruption that began in summer 2024, when inaccurate demand projections contributed to supply shortages and price volatility.

Source: nippon.com. (2026, July 28). *Consumption of Domestic Rice Hits Record Low in Japan*.

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