



WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

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Indonesia

Indonesia's Rice Reserves Seen Sufficient Through Year-End

Indonesia's national rice reserve stands at around 4.8 million tonnes, with state logistics agency Bulog saying the stock is sufficient to meet domestic needs through the end of 2026. Bulog plans to use the reserves for major government programmes in the fourth quarter, including food assistance for about 33.2 million beneficiaries from October to December 2026 and an additional 1 million MT of rice under the Food Supply and Price Stabilization (SPHP) programme. Despite these distributions, Bulog expects its reserves to remain at around 3.2 million MT by the end of 2026, providing a substantial buffer to support market stabilization. The agency has also leased private warehouses after its own storage facilities reached full capacity. At the regional level, Bulog warehouses in Cilacap, Banyumas, Purbalingga, and Banjarnegara currently hold 54,686 MT of rice, which is sufficient for local demand through the end of the year.

Source: ANTARA News. (2026, September 26). *Indonesia secures 4.8 million tons of rice stock through year-end.*

Philippines

USDA Raises Philippine Rice Import Forecast to 5.7 million MT for 2027

The USDA raised its forecast for Philippine rice imports in 2027 to 5.7 million MT, up from 5.6 million MT previously and about 4 percent above the 5.5 million MT projected for 2026, due to continued production shortfalls and the need to build buffer stocks. Domestic milled rice production is forecast at 12.25 million MT in 2026/27, a decrease from 12.36 million MT, amid dry weather and high fertiliser costs. Meanwhile, imports reached 3.67 million MT in the first eight months of 2026, with Vietnam accounting for 72 percent of total imports.

Source: Manila Bulletin. (2026, September 25). *USDA raises Philippine rice import forecast amid persistent crop deficit*

Thailand

Thailand's Rice Reserve Has Been Proposed to Increase by 30 Percent

Thailand's Department of Internal Trade (DIT) has proposed increasing the country's strategic rice reserve by 30 percent to guard against a potential El Niño-related drought and possible supply and price risks. The DIT says the proposal reflects rising global rice stockpiling, with countries building reserves to strengthen food security and prepare for possible drought. Despite higher global stocks, rice prices have remained relatively high, indicating continued demand for strategic reserves. In addition, the DIT does not expect significant increases in milled rice prices, provided supplies remain sufficient.

Source: bernama. (2026, September 25). *Thailand Proposed 30 Pct Rise In Rice Reserve, 20 Pct In Crude Palm Oil*

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