

ASEAN EARLY WARNING INFORMATION

Crop Situation

NO.34 | MARCH 2025



Released by AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
<http://www.aptfsis.org>

Crop Situation of Brunei Darussalam in Crop Year 2024/2025



Brunei Darussalam Situation in crop year 2024/2025

Brunei Darussalam is expected to experience favorable weather conditions in crop year 2024/2025, with sufficient water supply due to appropriate rainfall and the use of irrigation systems. The temperature is expected to be suitable for plants, ranging from 25–35°C, and there will be adequate sunlight for growth. However, the country may also face the impacts of climate change or global warming, particularly extreme rainfall, as reported. The data on the effects of disasters on crops is not yet available.

Nevertheless, the government and farmers are collaborating to address these challenges. Farmers will adapt their agricultural practice by mitigating risks and damage from natural disasters, such as adjusting cultivation plans, altering planting schedules, and using improved plant varieties. The government has implemented various policies to support these efforts, including providing farmers with new technologies, improving irrigation and drainage systems, and ensuring market access for farmers.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is forecasted to increase, influenced by commercial rice farmers expanding their areas for rice cultivation. However, rice production is forecasted to decrease due to unfavorable weather conditions, such as extreme rainfall and flooding, including flash floods in certain areas and flooding during harvest time. For the rice harvest period, the wet season harvest will take place from January 2025 to April 2025, while the dry season harvest will start from July 2025 to October 2025. Regarding rice trade, rice imports are forecasted to increase, as shown in the graph for 2024, which indicates a gradual rise in imports throughout the year (Figure 1).

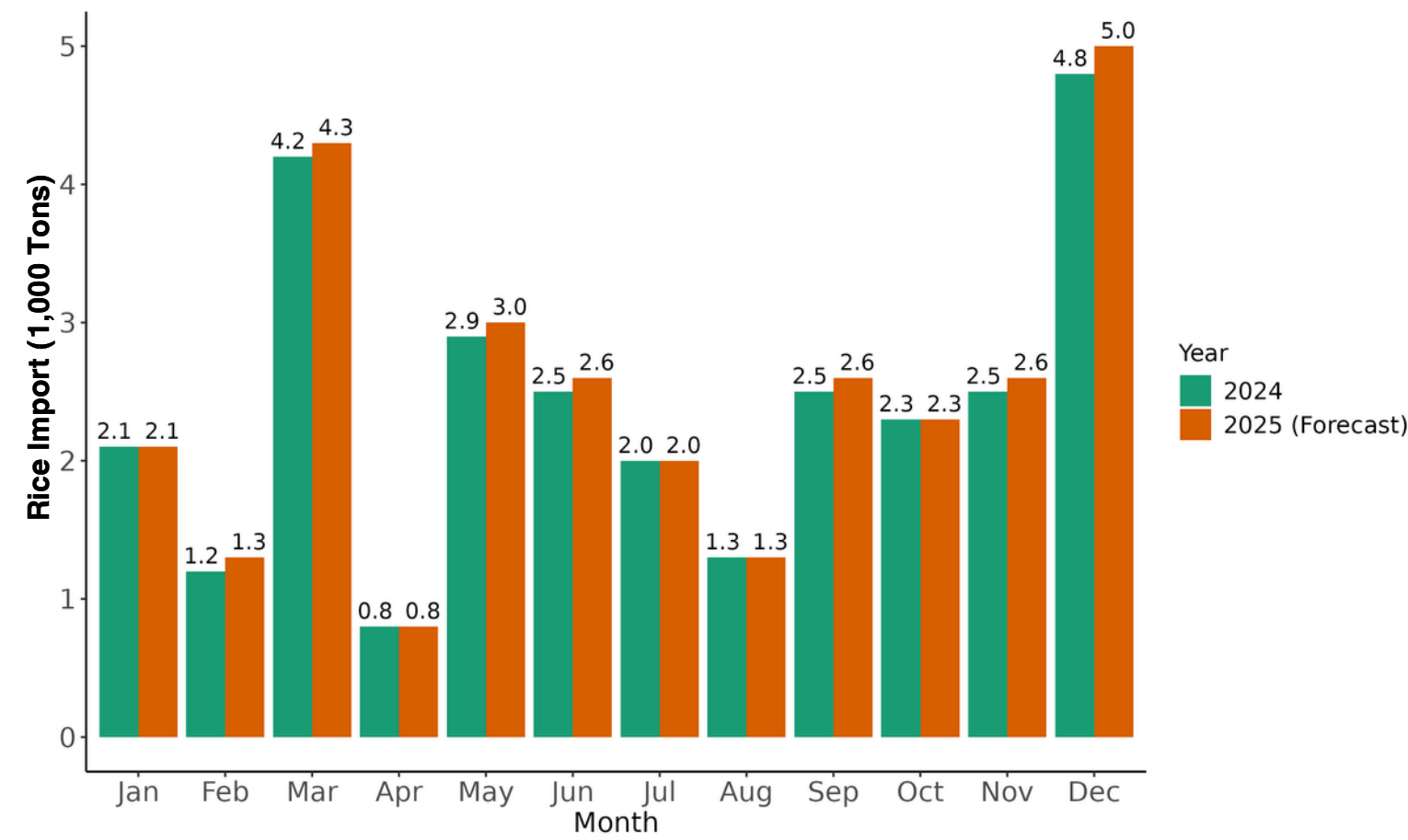


Figure 1: Monthly quantity of rice import in 2024–2025 (forecast)

For maize crops in crop year 2024/2025, the planted area is forecasted to increase due to farmers responding to rising maize prices and favorable weather conditions. Additionally, the maize production is also expected to increase, driven by favorable weather conditions, improved crop management practices, increased fertilizer use, crop rotation plans, expansion of maize cultivation areas, and high consumer demand. The maize harvest period will be continuous planting and harvesting throughout the year. Regarding maize trade, maize imports are forecasted to increase (Figure 2).

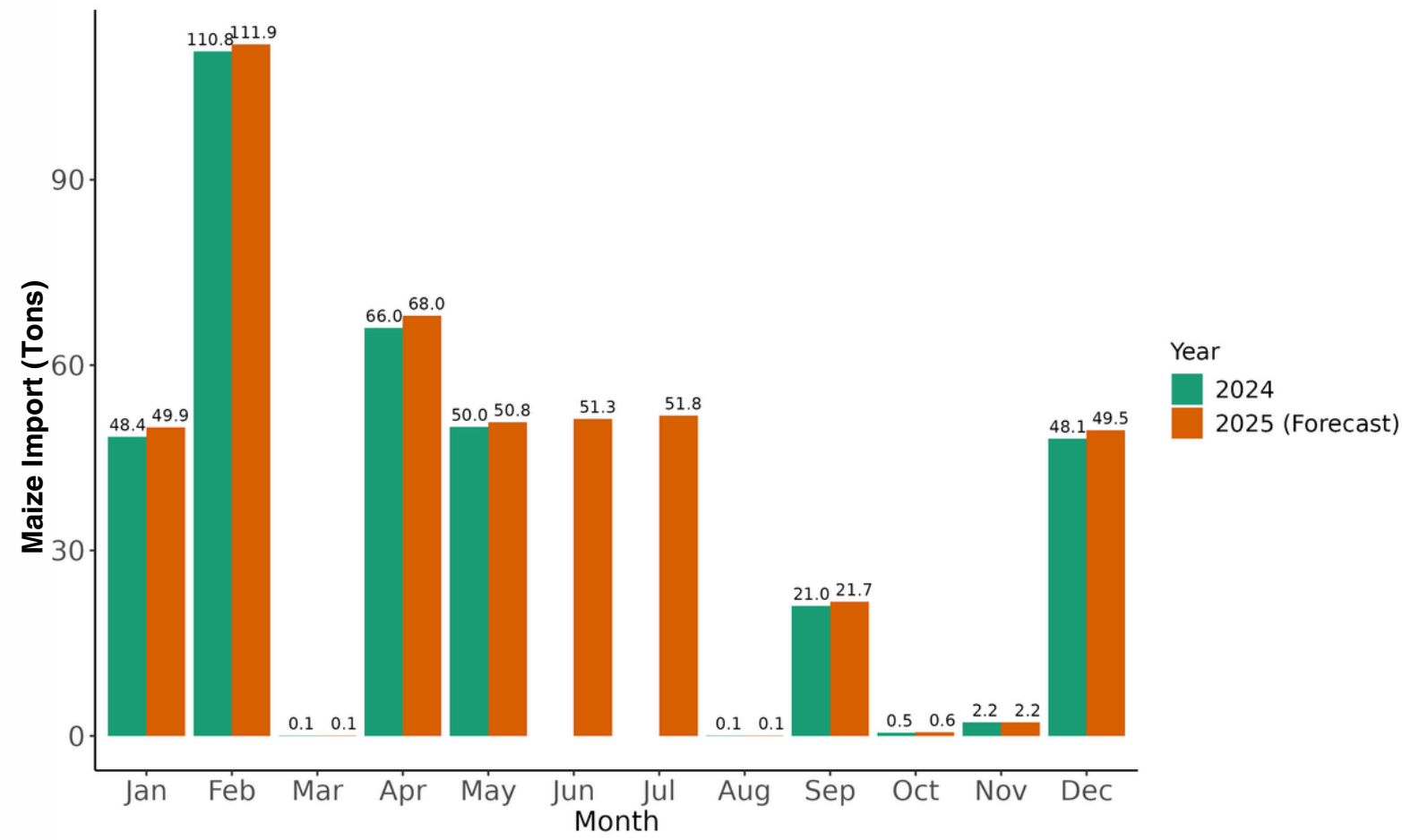


Figure 2: Monthly quantity of maize import in 2024–2025 (forecast)

For sugarcane crops in crop year 2024/2025, the planted area is forecasted to increase due to favorable weather conditions. The sugarcane production is expected to increase, driven by favorable weather conditions, better crop management practices, increased fertilizer application, and the use of high-quality sugarcane varieties. The sugarcane harvest period will be continuous planting and harvesting throughout the year. Regarding sugar trade, sugar imports are forecasted to increase, as shown in the graph, with imports fluctuating around mid-year, peaking in June at 1,680 tons, while imports in other months remain steady at approximately 840 tons (Figure 3).

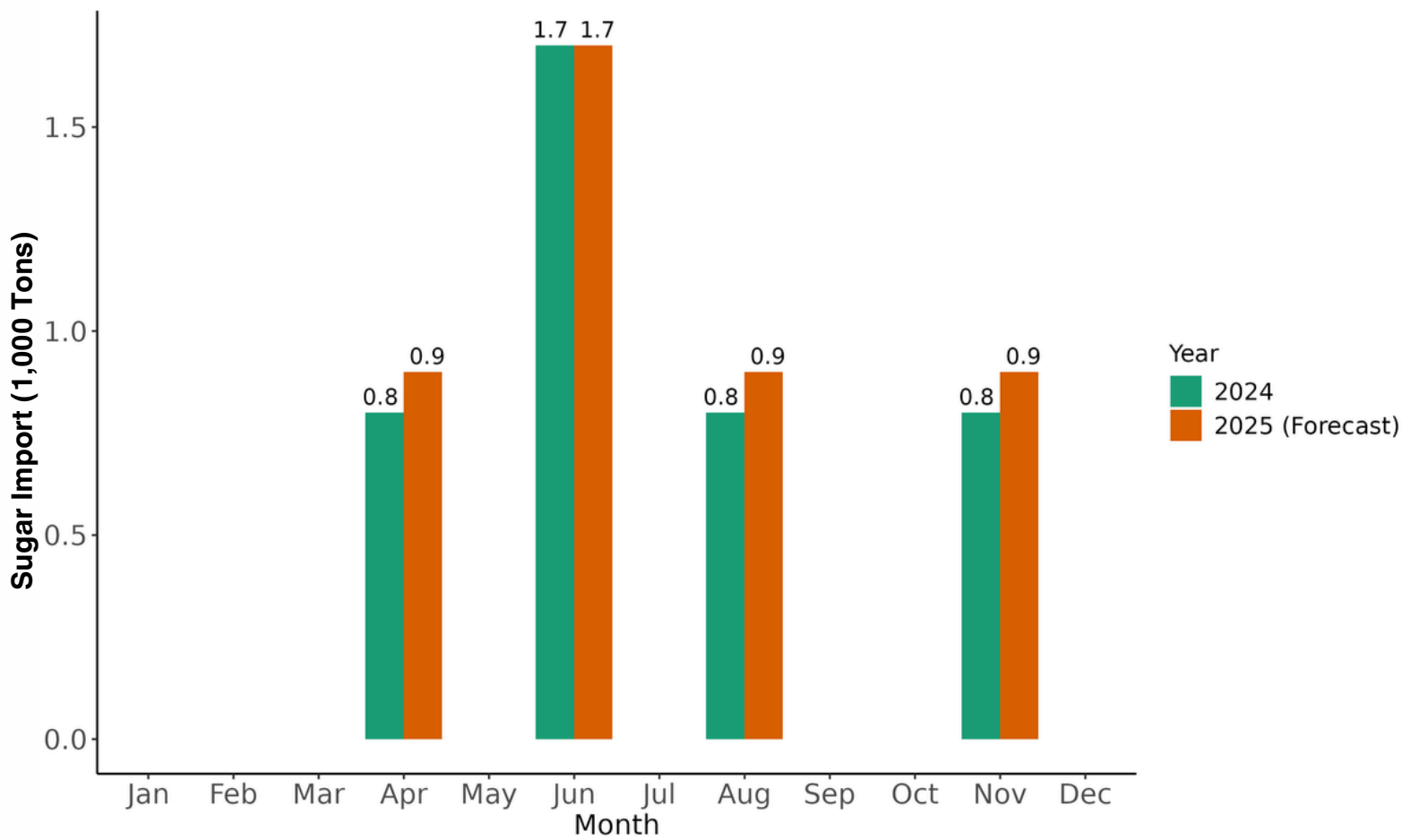


Figure 3: Monthly quantity of sugar import in 2024–2025 (forecast)

For soybean production in crop year 2024/2025, soybean imports are expected to increase, as shown in the graph, with fluctuations throughout the year (Figure 4).

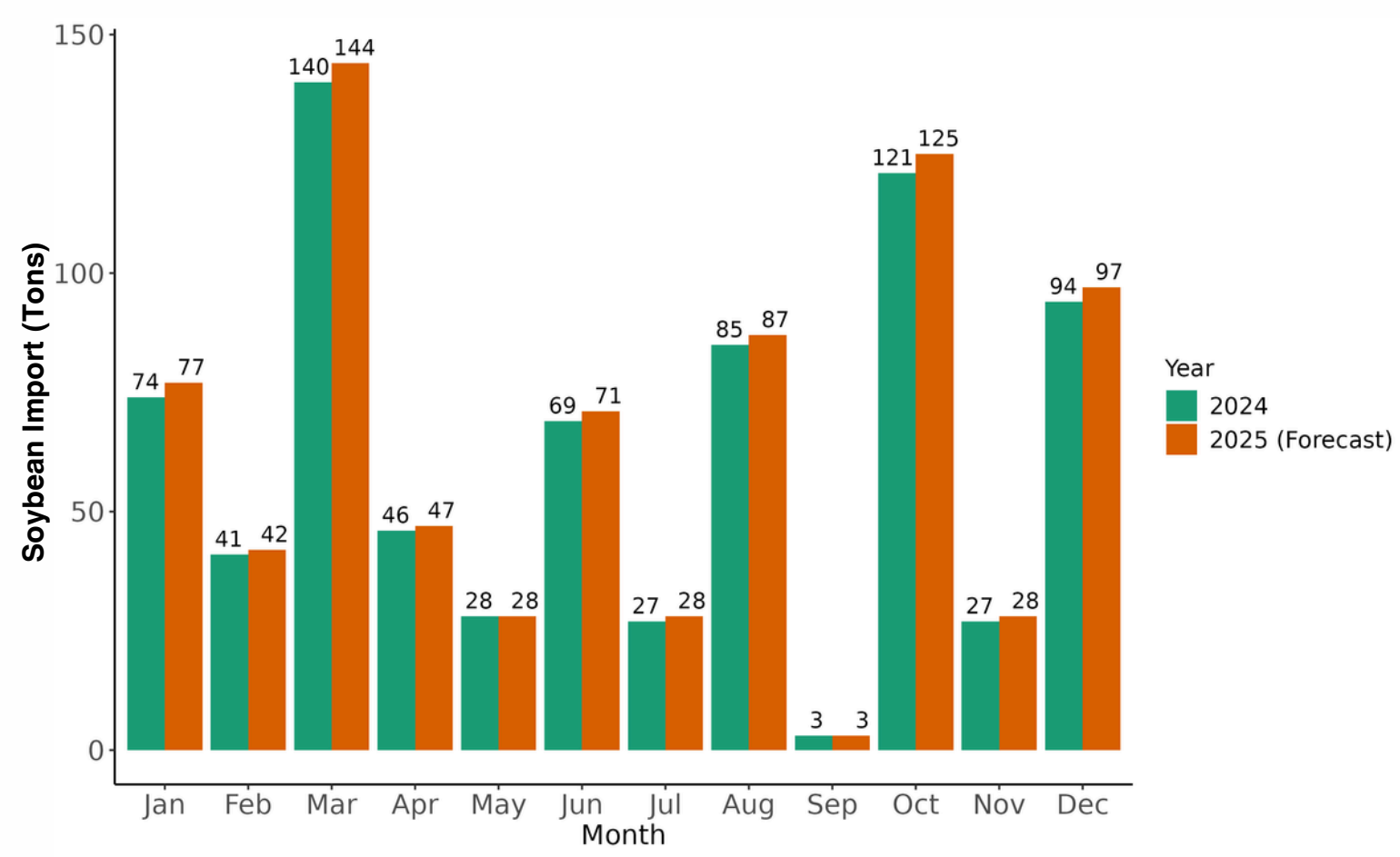


Figure 4: Monthly quantity of soybean import in 2024–2025 (forecast)

For cassava crops in crop year 2024/2025, the planted area is forecasted to increase as farmers will respond to rising cassava prices. The cassava production is expected to increase due to better crop management practices, the use of high-quality cassava varieties, and increasing demand for value-added and processed products such as crisps, fritters, and desserts. Additionally, farmers are expanding the area dedicated to cassava cultivation. The cassava harvest period will be continuous planting and harvesting throughout the year. Regarding cassava trade, cassava imports are forecasted to increase.

Crop Situation of Cambodia in Crop Year 2024/2025



Cambodia situation in crop year 2024/2025

Cambodia is predicted to experience favorable weather conditions in crop year 2024/2025, with sufficient water supply from appropriate rainfall and irrigation. The temperature is expected to be suitable for plant, ranging from 21–35°C, and proper sunlight for plants. Rainfall is forecasted to be moderate, ranging from 20 to 50 mm/day. However, the country may also face climate change or global warming challenges that could affect agricultural crops, such as extreme drought conditions (El Niño) and heavy rainfall leading to floods (La Niña) throughout the year.

Natural disasters have already been reported with floods affecting areas such as Banteay Meanchey, Battambang, Kampong Cham, Kampong Thom, Takeo, Prey Veng, Tbong Khmom, and Siem Reap. Droughts have impacted Banteay Meanchey, Battambang, and Siem Reap, while diseases and pest infestations have affected Takeo, Prey Veng, Tbong Khmom, and Kampong Cham, damaging 41,993 hectares of rice crops.

Regarding mitigating risks and damages from these natural disasters, farmers will adapt by adjusting their cultivation plans, changing planting schedules, and using resilient plant varieties. Additionally, the government has implemented various policies to support farmers, such as promoting new technologies, increasing access to credit, providing markets for agricultural products, and supporting the development of Modern Agricultural Communities. Additionally, farmers and the government are also collaborating on water management to reduce damage from natural disasters.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is forecasted to increase due to favorable weather and government policies. The rice production is expected to increase, driven by favorable weather conditions and the use of high-quality rice varieties by farmers. Regarding rice trade, particularly exports, they are predicted to be similar to 2024 with two peaks: the first peak in April at 82,040 tons and the second peak in December at 70,310 tons (Figure 5). Information on the forecast for the rice harvest season and imports is not yet available.

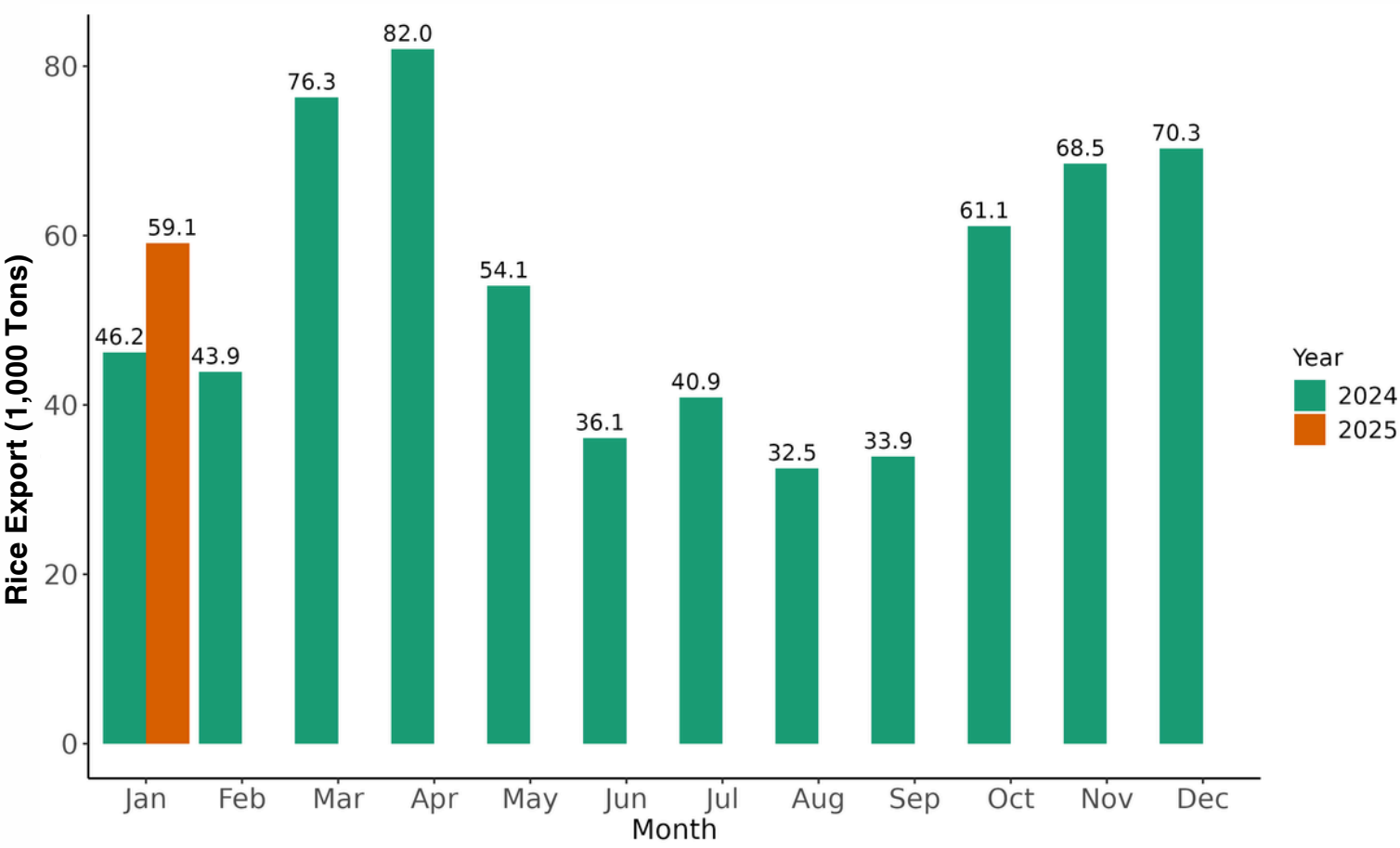


Figure 5: Monthly quantity of rice export in 2024–2025

For maize crops in crop year 2024/2025, the planted area is forecasted to decrease due to rising prices of competing crops. Additionally, the maize production is also expected to decline due to natural disasters such as floods and droughts. Information on the forecast for the maize harvest season and trade is not yet available.

For sugarcane crops in crop year 2024/2025, the planted area is forecasted to decrease due to rising prices of competing crops and unfavorable weather conditions. Information on the forecast for sugarcane production, the harvest season, and sugar trade is not yet available.

For soybean crops in crop year 2024/2025, the planted area is forecasted to decrease due to rising prices of competing crops and unfavorable weather conditions. Information on the forecast for soybean production, the harvest season, and soybean trade is not yet available.

For cassava crops in crop year 2024/2025, the planted area is forecasted to decrease as farmers respond to declining cassava prices and rising prices of competing crops. Additionally, the cassava production is expected to decrease due to natural disasters such as floods and droughts. Information on the forecast for the cassava harvest season and trade is not yet available.

Crop Situation of Indonesia in Crop Year 2024/2025



Indonesia situation in crop year 2024/2025

Indonesia is forecasted to be favorable for growing crops in crop year 2024/2025 with sufficient water availability to meet commodity needs. This includes variance rainfall, ranging from low (0.5-20 mm/day), to moderate (20-50 mm/day), and heavy rainfall (50-100 mm/day), and water supply supplemented by irrigation in regions with limited water resources. The temperature is expected to remain within a range conducive to crop growth, and plants will receive adequate sunlight for growth.

Regarding the impact of climate change or global warming in crop year 2024/2025, Indonesian authorities have reported that no significant effects are expected on commodity crops. However, some regions may experience the impacts of climate change, such as extreme drought conditions (El Niño) alternating with heavy rain (La Niña) during the year.

Additionally, certain disasters are expected to affect various regions, including flooding in South Sumatra, Riau, West Java, East Java, South Kalimantan, South Sulawesi, and droughts in Lampung, West Java, Central Java, and West Nusa Tenggara. Diseases and pests are expected to affect areas such as South Sumatra, West Java, Central Java, DI Yogyakarta, Bali, South Kalimantan, Southeast Sulawesi, and Lampung.

Nevertheless, farmers will adapt to these risks by adjusting their cultivation plans or planting schedules to suit changes in weather patterns and by using plant varieties that are resistant to climate change. Despite this, some areas are still experiencing damage due to climate change or global warming. Farmers and the government are working together on water management to effectively reduce damage from natural disasters.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area and production are predicted to increase. The increase in planted area is due to government policies, farmers responding to rising rice prices, and attributing to rice being a staple food for the Indonesian population. The increase in rice production is attributed to favorable weather, better crop management by farmers, and the use of high-quality rice varieties. The harvest period for the wet season crops is from January to June, while the dry season crops will be harvested from July to December. Regarding rice trade in 2024, imports at the beginning of the year increased, peaking at 552,799 tons in March, and then steadily dropped, reaching a low of 140,183 tons in September. Imports then increased again until November. This trend is expected to continue in 2025, with an increase in imports in the first quarter, followed by a decrease in the third quarter. Rice exports remained low, with volumes ranging from 0.44 to 19.34 tons throughout the year, but a significant peak occurred in April with 425 tons exported (Figure 6-7).

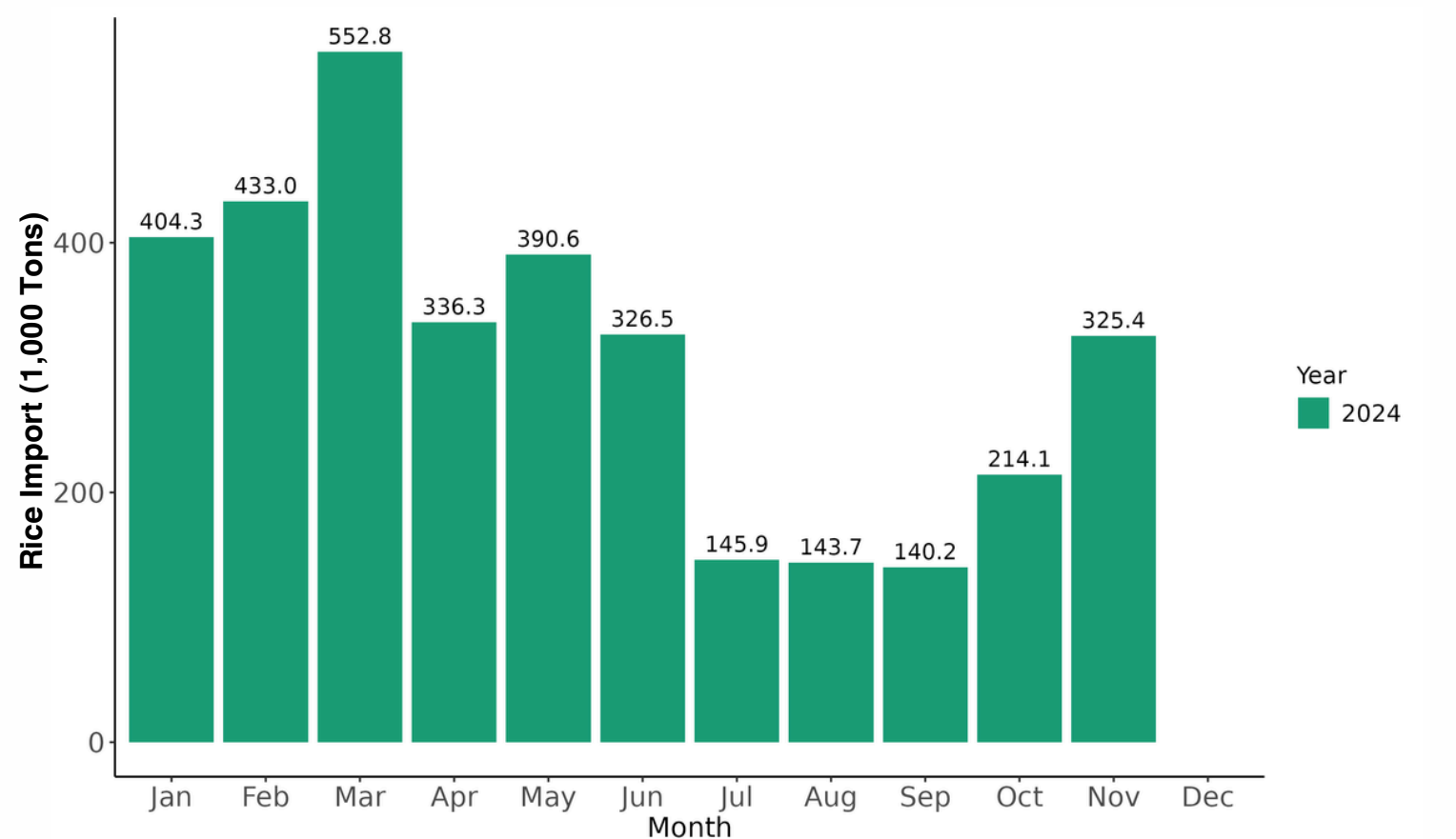


Figure 6: Monthly quantity of rice import in 2024

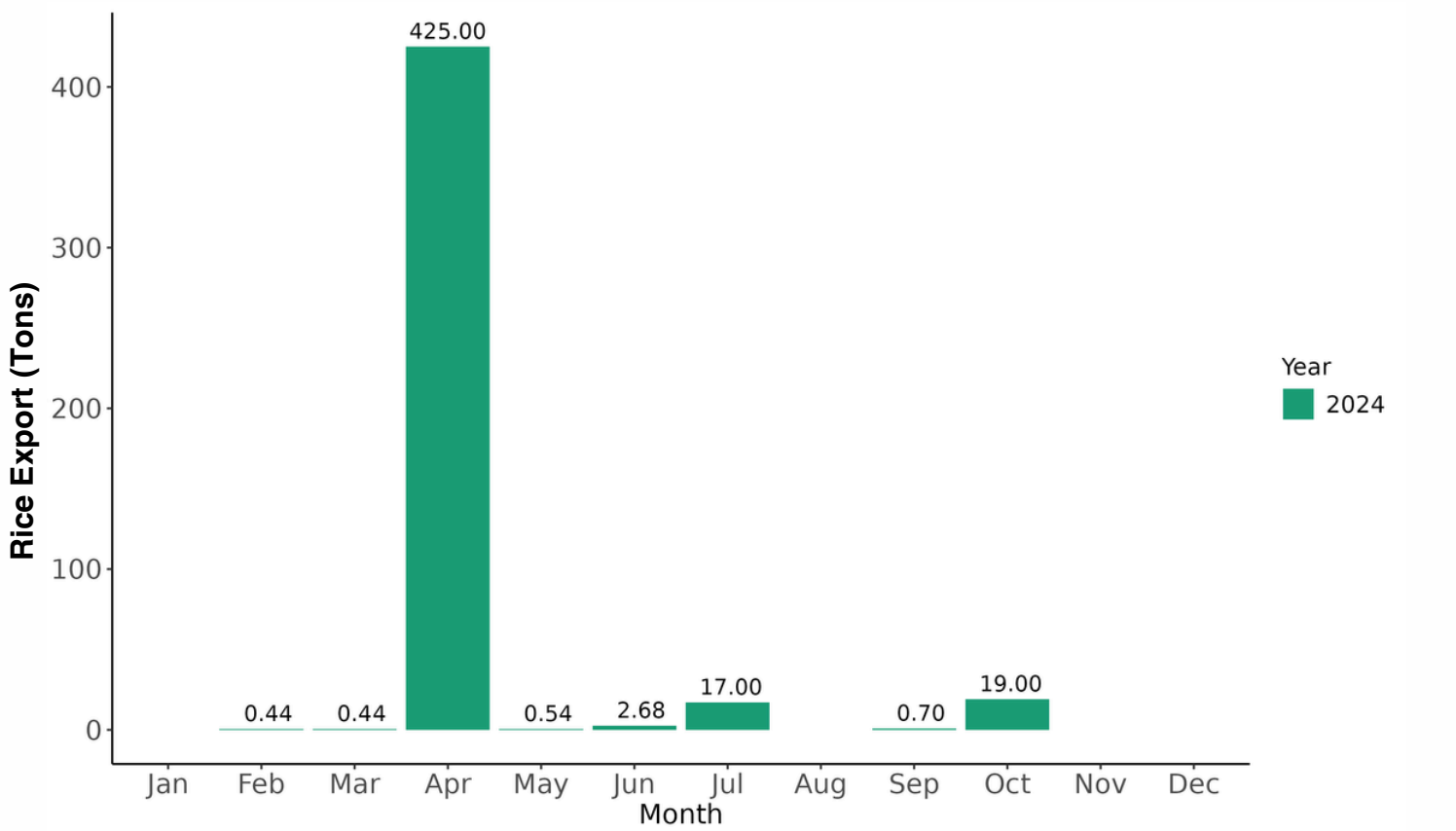


Figure 7: Monthly quantity of rice export in 2024

For maize crops in crop year 2024/2025, the planted area and production are also predicted to increase. The rise in planted area is due to government policies and farmers' response to rising rice prices. The increase in maize production is attributed to favorable weather, improved crop management, and the use of good-quality maize varieties. The harvest period will include three crops: the first crop from January to April, the second from May to August, and the third from September to December. Regarding maize trade in 2024, imports increased early in the year, then dropped to 20,157 tons in June before rising again in the second half of 2024. This trend is expected to result in a slight increase in imports into 2025, with a reduction expected in mid-2025 (Figure 8). Maize exports remained low throughout the year from 186.74 tons declining to 40.6 tons, but there was a significant export peak in mid-2024, with 40,901.65 tons in July and 14,082.09 tons in August (Figure 9). It is expected that maize exports in 2025 will slightly increase early in the year, with a substantial rise in exports mid-year.

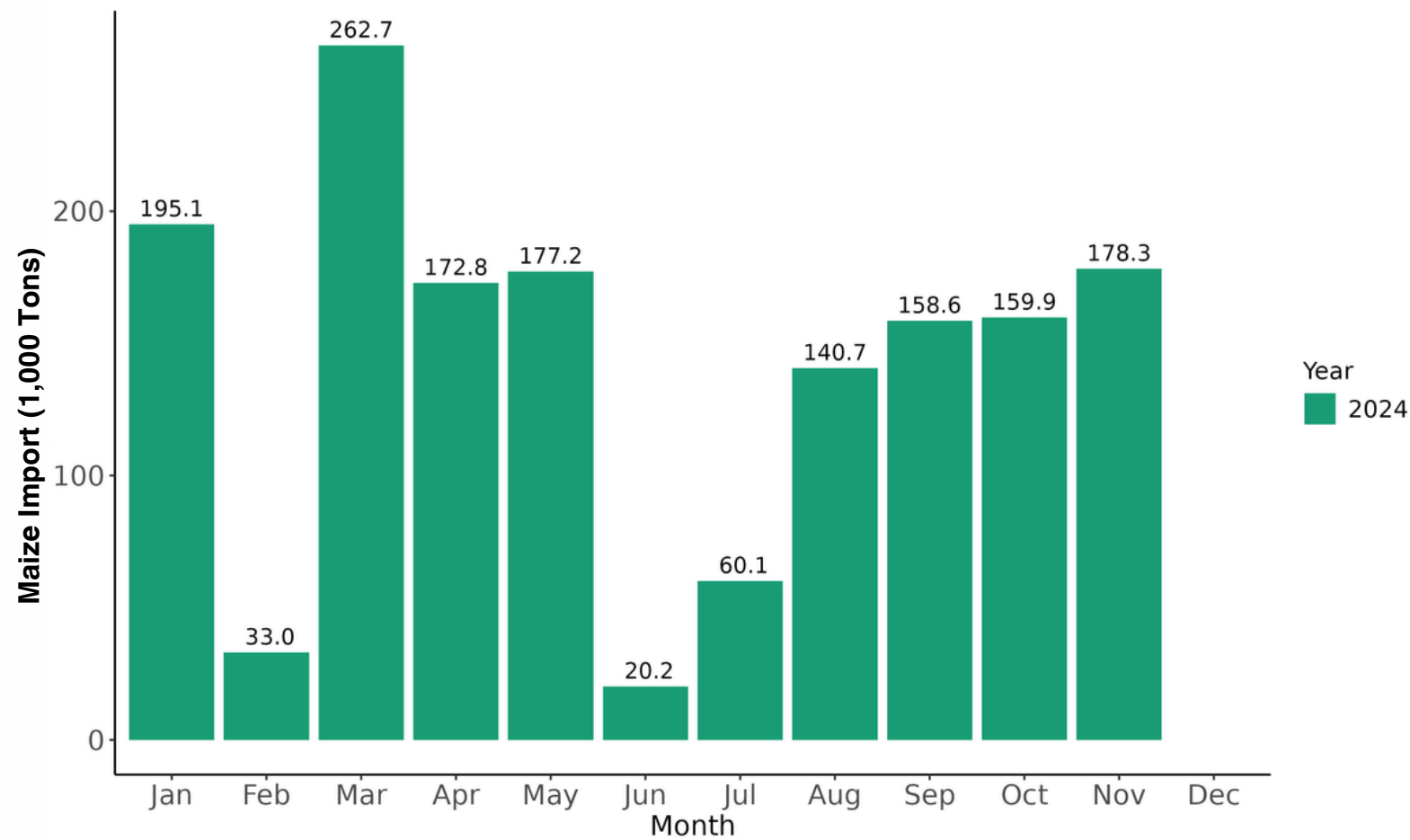


Figure 8: Monthly quantity of maize import in 2024

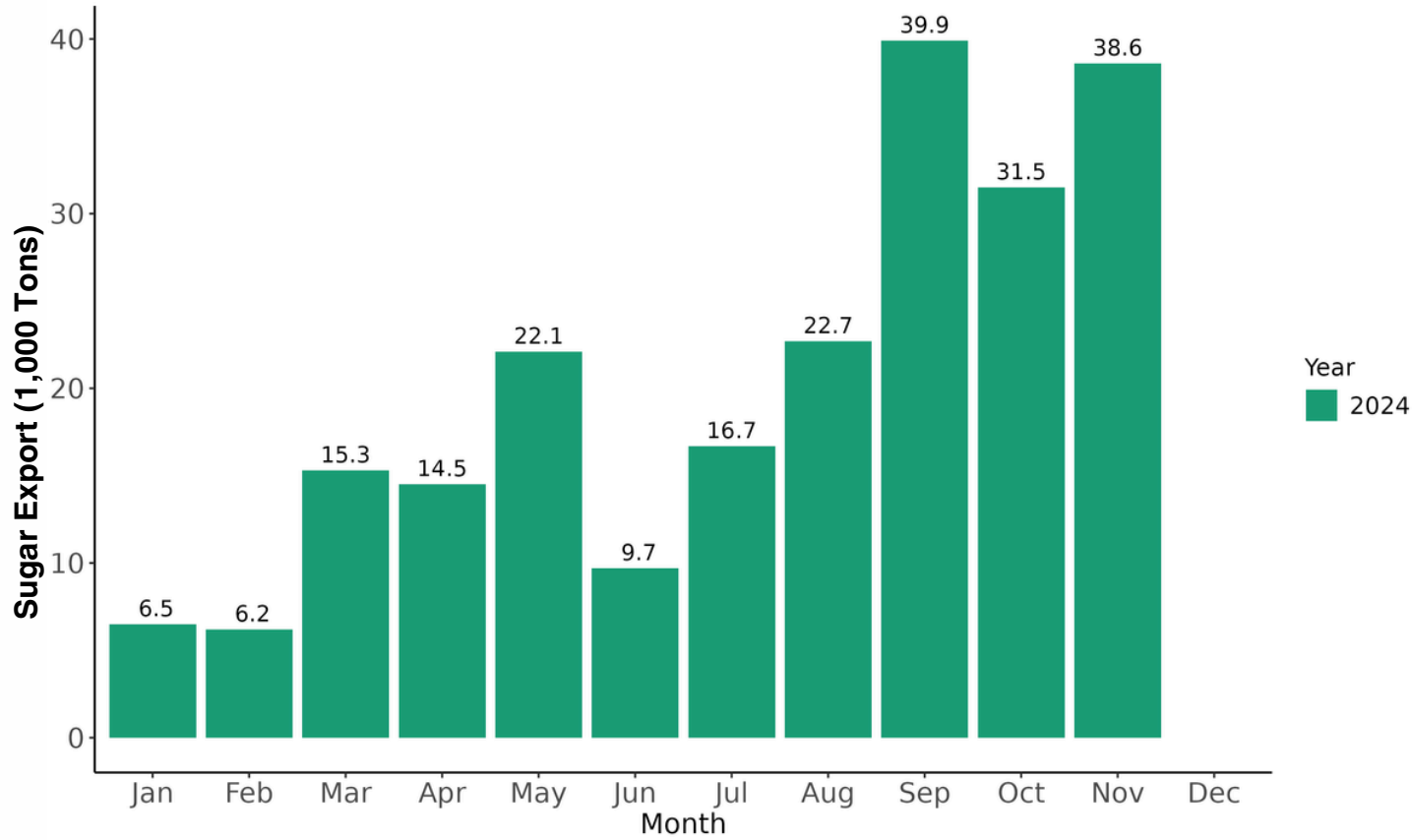


Figure 11: Monthly quantity of sugar export in 2024

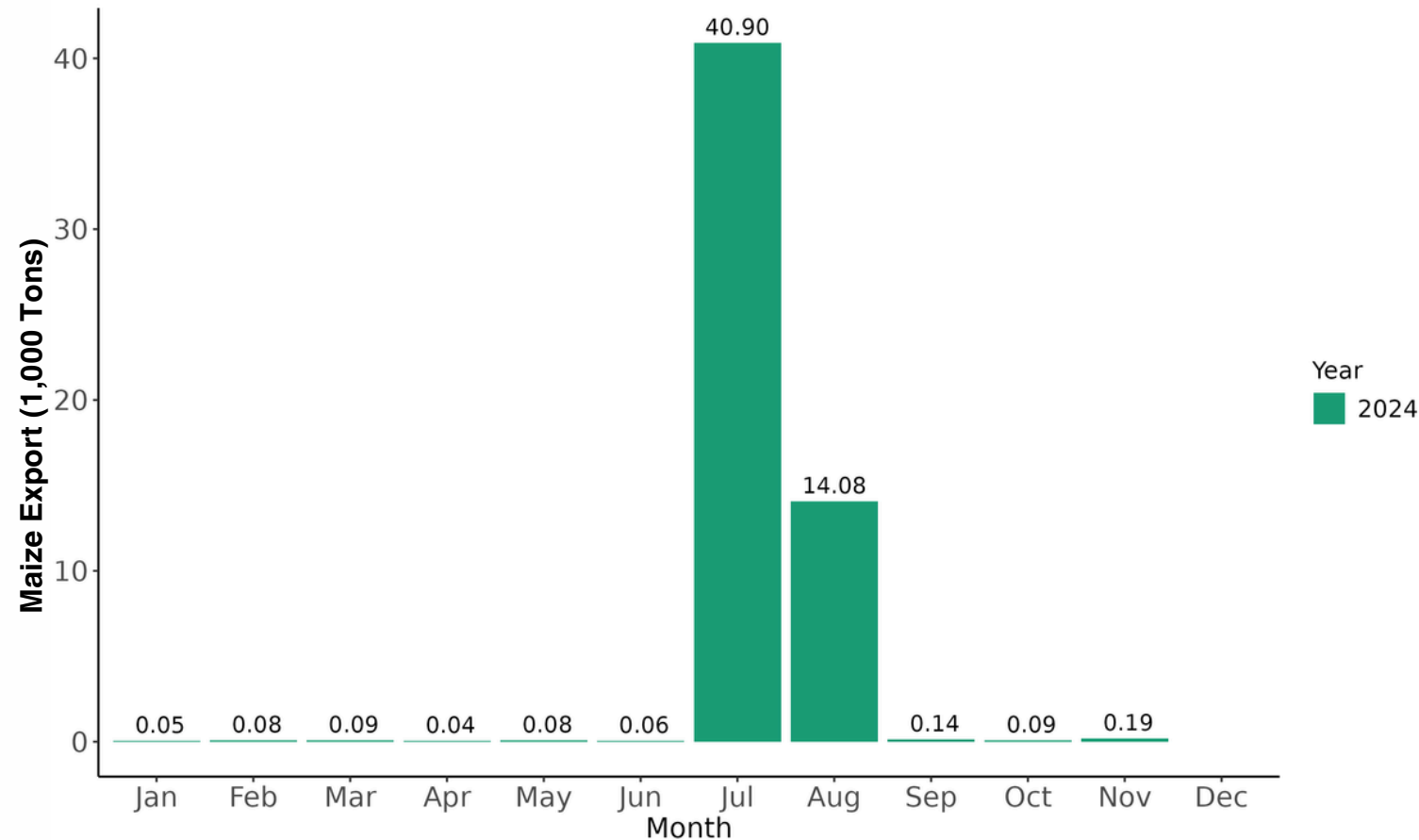


Figure 9: Monthly quantity of maize export in 2024

For soybean crops in crop year 2024/2025, the planted area and production are predicted to decrease. The decrease in planted area is due to rising prices of competing crops, unfavorable weather, government policies, and competition from more economically viable food and horticultural crops. The decline in soybean production is attributed to unfavorable weather conditions and reduced interest from farmers, leading to less intensive cultivation of existing crops. The harvest period will include three crops: the first crop from January to April, the second crop from May to August, and the third crop from September to December. Regarding soybean trade in 2024, imports ranged from 170,000 to 273,000 tons, and this trend is expected to continue in 2025 (Figure 12). The export trade for soybeans fluctuated throughout 2024, with volumes ranging from 92 to 310 tons (Figure 13), and this trend is expected to continue in 2025.

For sugarcane crops in crop year 2024/2025, the planted area and production are expected to increase. The increase in planted area is due to farmers responding to rising rice prices and government policies supporting sugarcane plantation expansion outside Java. The increase in sugarcane production is attributed to favorable weather conditions and improved crop management. The harvest period will begin from January to November. Regarding sugar trade in 2024, imports ranged from 278,000 to 548,000 tons. This is expected to slightly increase from late 2024 into early 2025 (Figure 10). Sugar exports showed continuous growth, with volumes rising from 6,498 tons to 38,612 tons in November, an increase of approximately 4.94 times or 84%. This trend is expected to continue in 2025 (Figure 11).

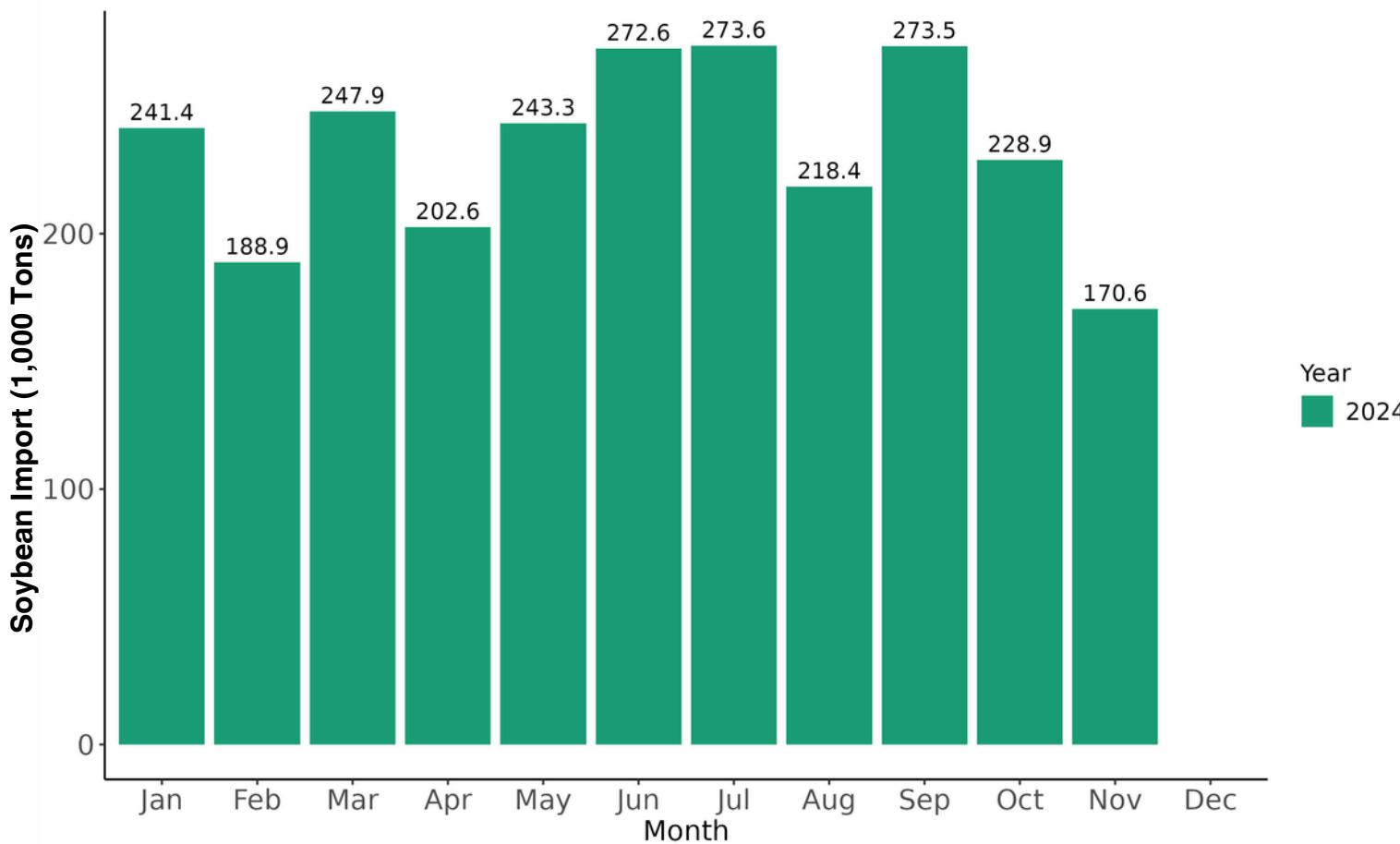


Figure 12: Monthly quantity of soybean import in 2024

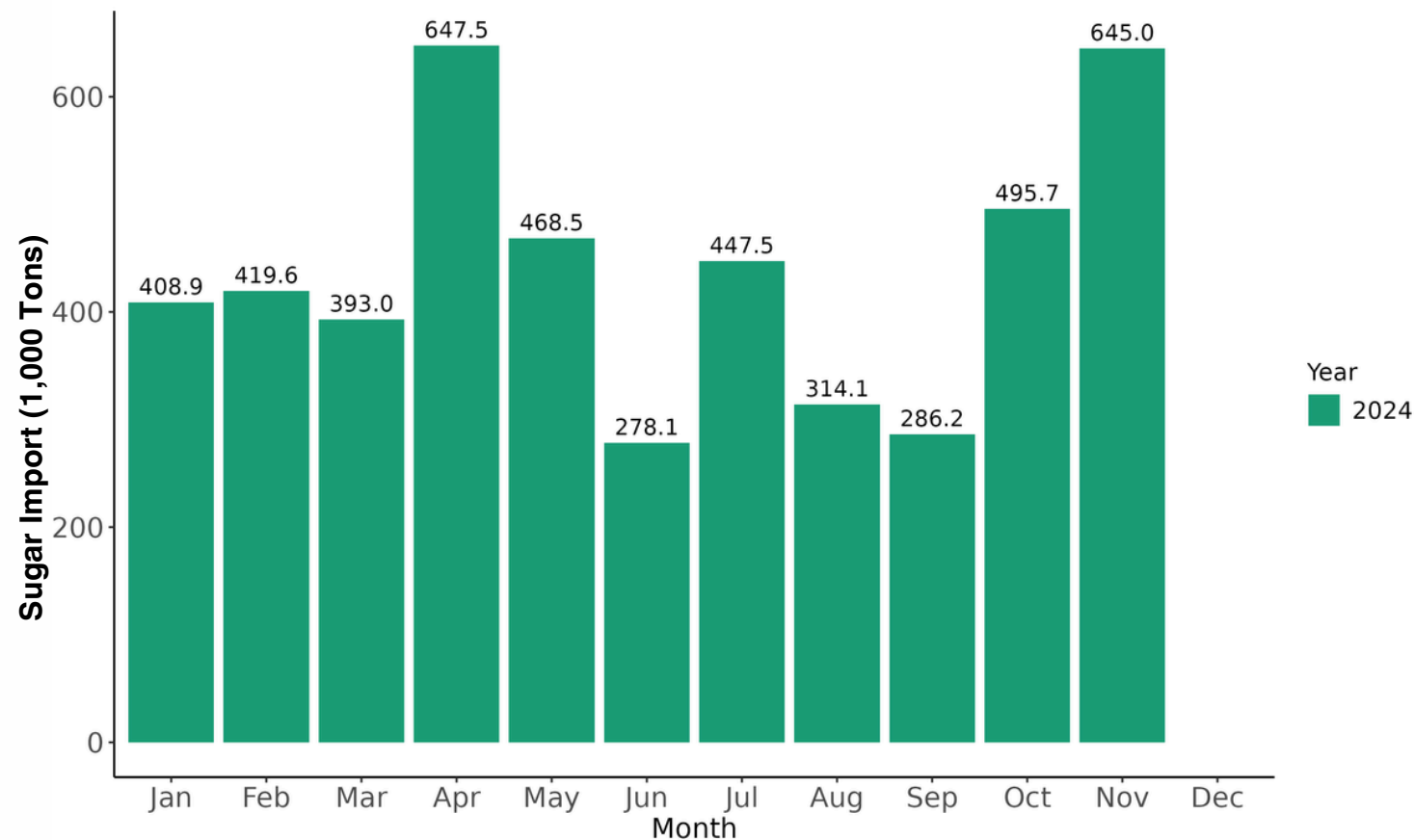


Figure 10: Monthly quantity of sugar import in 2024

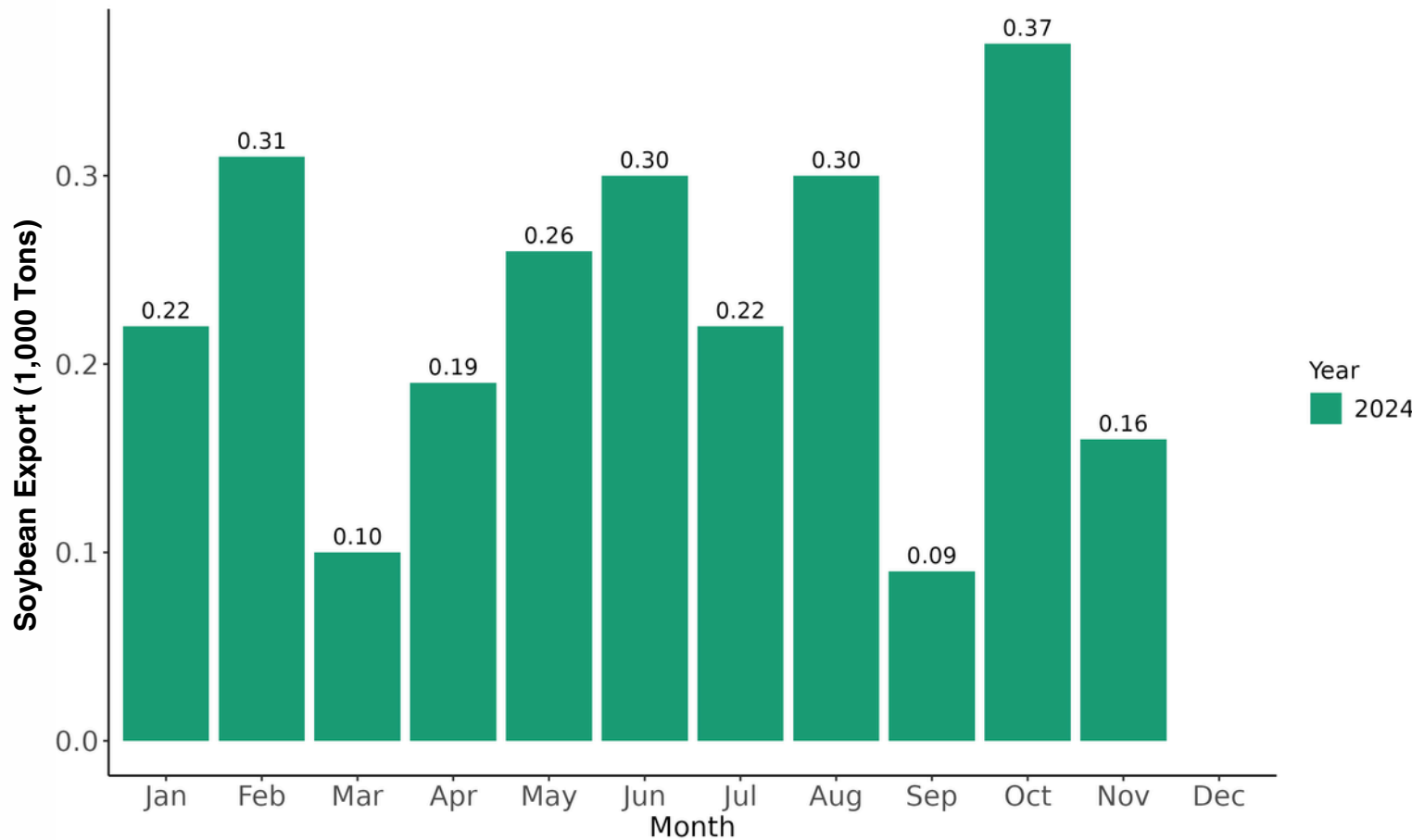


Figure 13: Monthly quantity of soybean export in 2024

For cassava crops in crop year 2024/2025, the planted area and production are predicted to decrease. The decrease in planted area is due to the rising prices of competing crops, government policies, and competition from other food crops and horticultural commodities. The decline in cassava production is due to reduced farmer interest, leading to less intensive cultivation of existing crops. The harvest period will include three crops: the first crop from January to April, the second crop from May to August, and the third crop from September to December. Regarding cassava trade in 2024, imports were high in the first quarter but dropped in subsequent quarters. This trend is expected to continue, with high import volumes expected in the first quarter of 2025 (Figure 14). Cassava exports fluctuated in 2024, ranging from 65 to 289 tons, and decreased towards the end of the year. However, cassava exports are expected to rise again in early 2025 compared to the later months of 2024 (Figure 15).

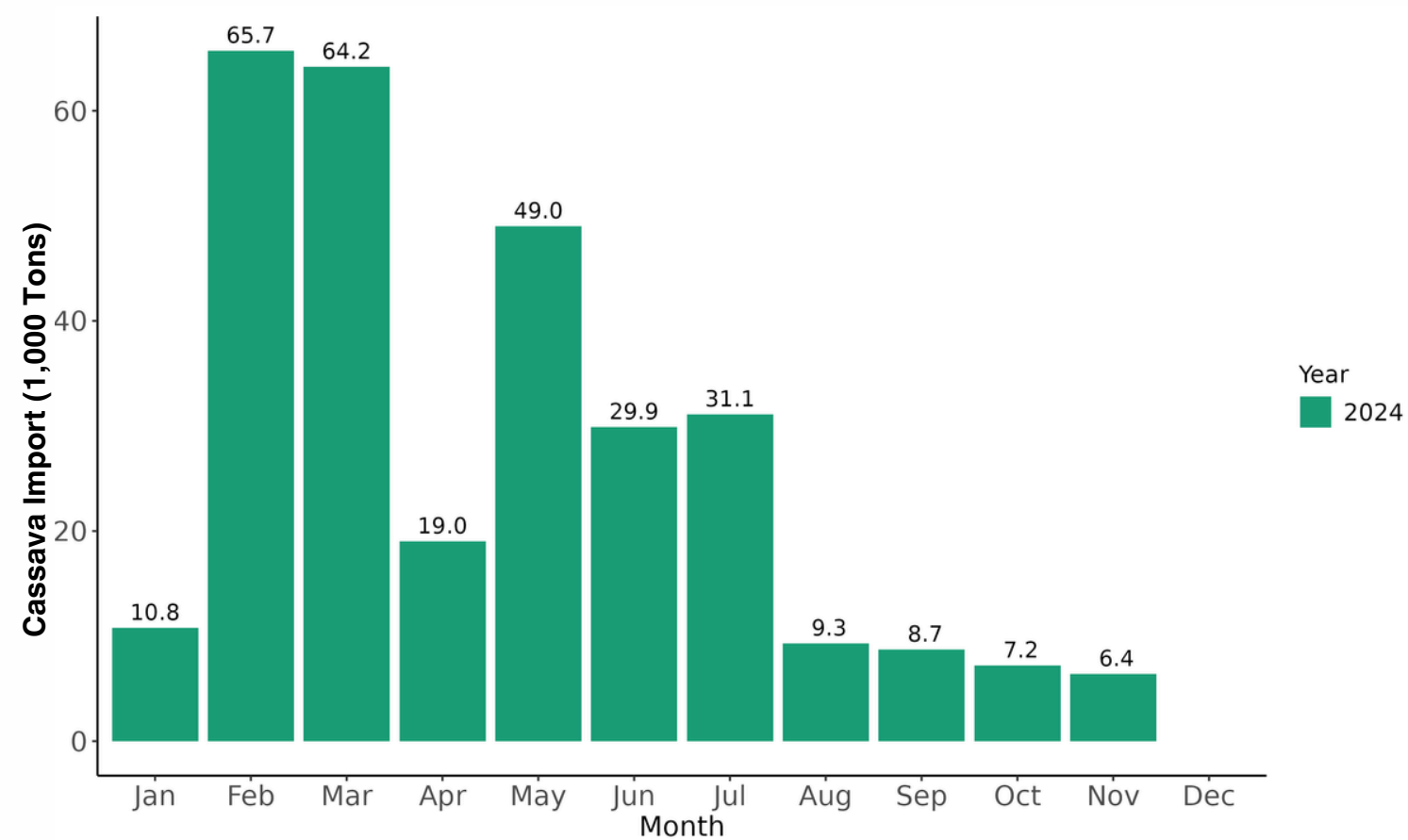


Figure 14: Monthly quantity of cassava import in 2024

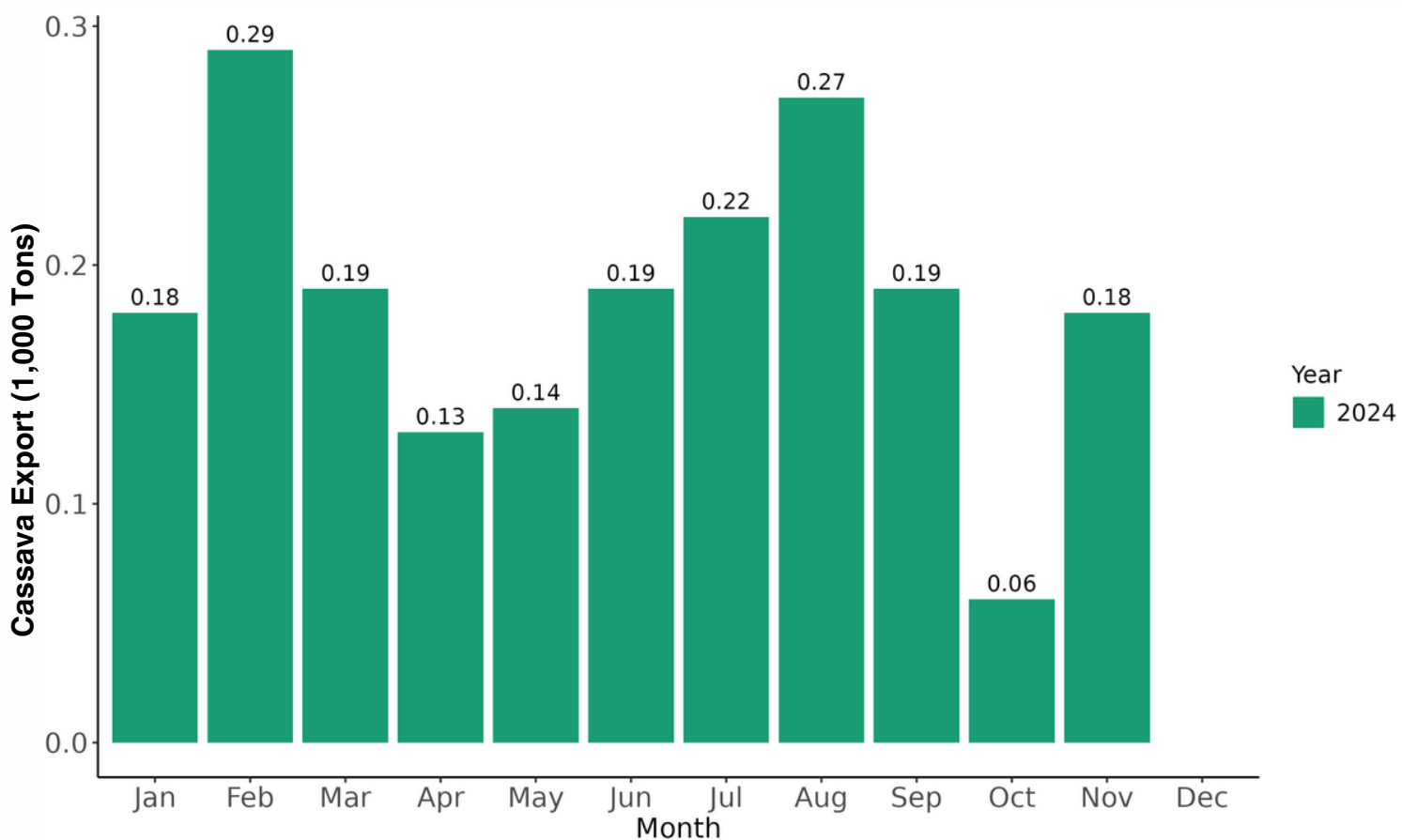


Figure 15: Monthly quantity of cassava export in 2024

Crop Situation of Lao PDR in Crop Year 2024/2025



Lao PDR situation in crop year 2024/2025

Lao PDR is forecasted to experience favorable weather conditions in crop year 2024/2025, with sufficient water supply from irrigation and adequate sunlight for plants. The rainfall season is expected to be normal. However, climate change or global warming may appear to affect the agricultural crops, leading to hotter-than-usual temperatures during both day and night. The impact on agricultural crops is not yet reported, as data on this issue is still unavailable.

Nonetheless, the government and farmers are collaborating to manage these challenges. Farmers will adapt by adjusting their cultivation plans, changing planting times, or using improved crop varieties to mitigate potential risks and damage from natural disasters. Meanwhile, the government will support the adoption of new technologies and expand market channels to ensure that farmers have access to credit.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is forecasted to increase as farmers respond to rising rice prices, favorable weather conditions such as sufficient sunlight, and government policies aimed at achieving a production target of at least 4.7 million tons of paddy rice. Additionally, the rice production is expected to increase due to favorable weather conditions, good crop management practices, and the use of high-quality rice varieties. For the rice harvest period, the wet season harvest will begin from October 2024 to December 2024, while the dry season harvest will take place from March 2025 to May 2025. Regarding rice trade, imports are forecasted to decrease (Figure 16) due to rising domestic production, while exports are expected to increase (Figure 17) due to higher demand from trading countries.

For maize crops in crop year 2024/2025, the planted area is forecasted to decrease as farmers respond to falling maize prices and rising prices of competing crops. This situation also appears to the maize production which is expected to decline due to the reduced planted area. The maize harvest period for the wet season began from September 2024 to November 2024, while the dry season harvest will take place from January 2025 to May 2025. Regarding maize trade, imports are forecasted to increase (Figure 18) due to rising domestic demand, while exports are expected to decrease (Figure 19) due to declining domestic production.

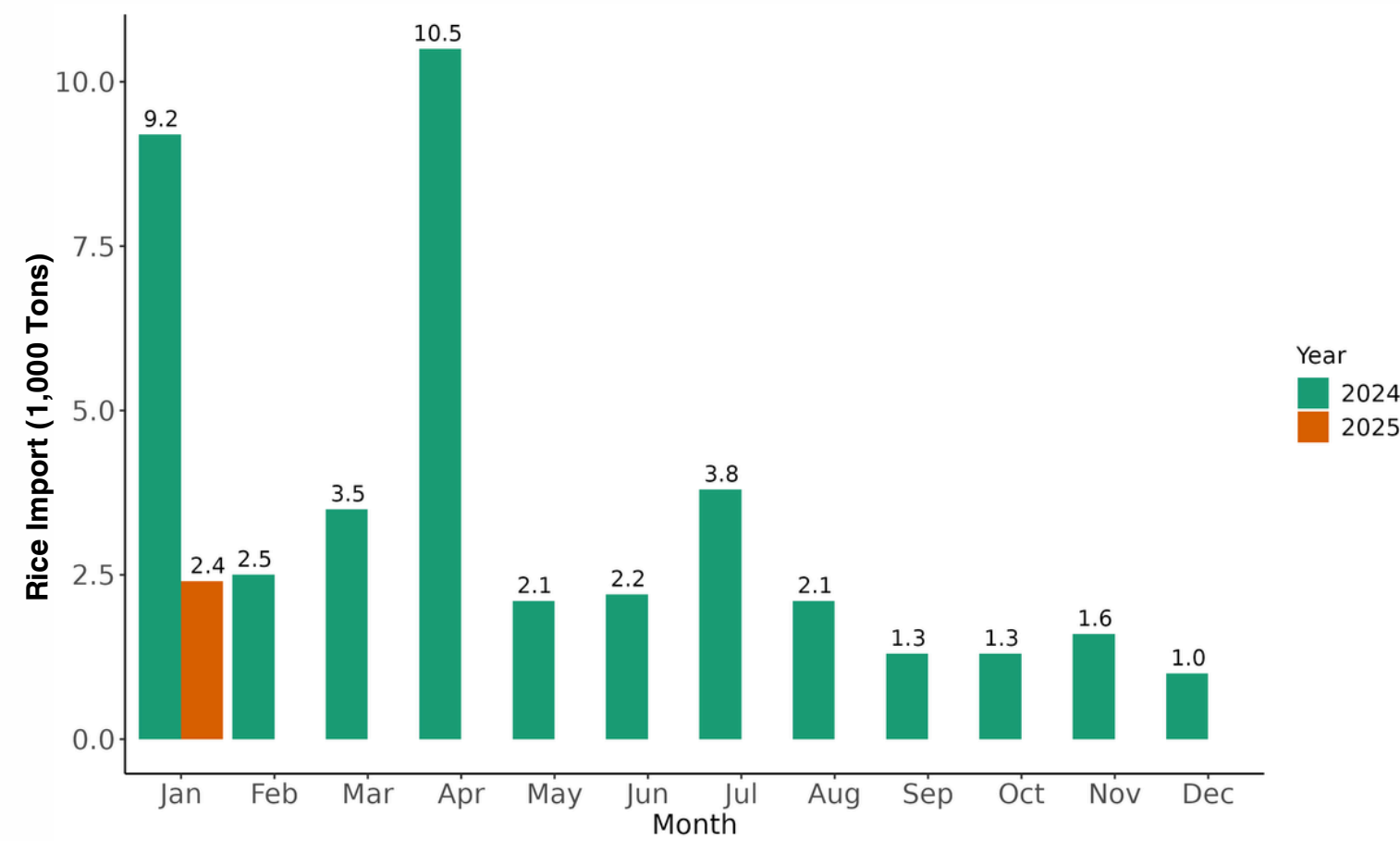


Figure 16: Monthly quantity of rice import in 2024–2025

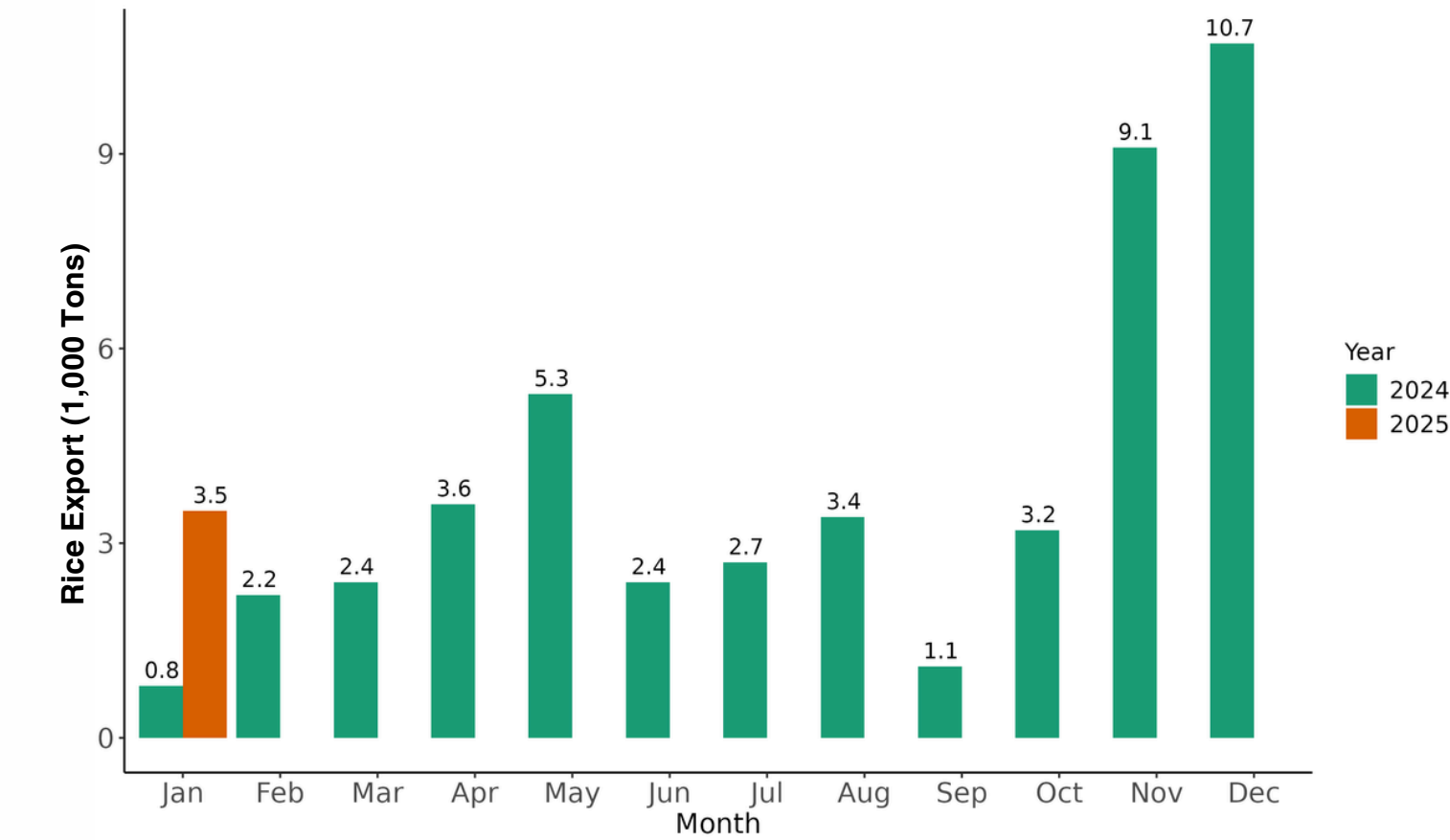


Figure 17: Monthly quantity of rice export in 2024–2025

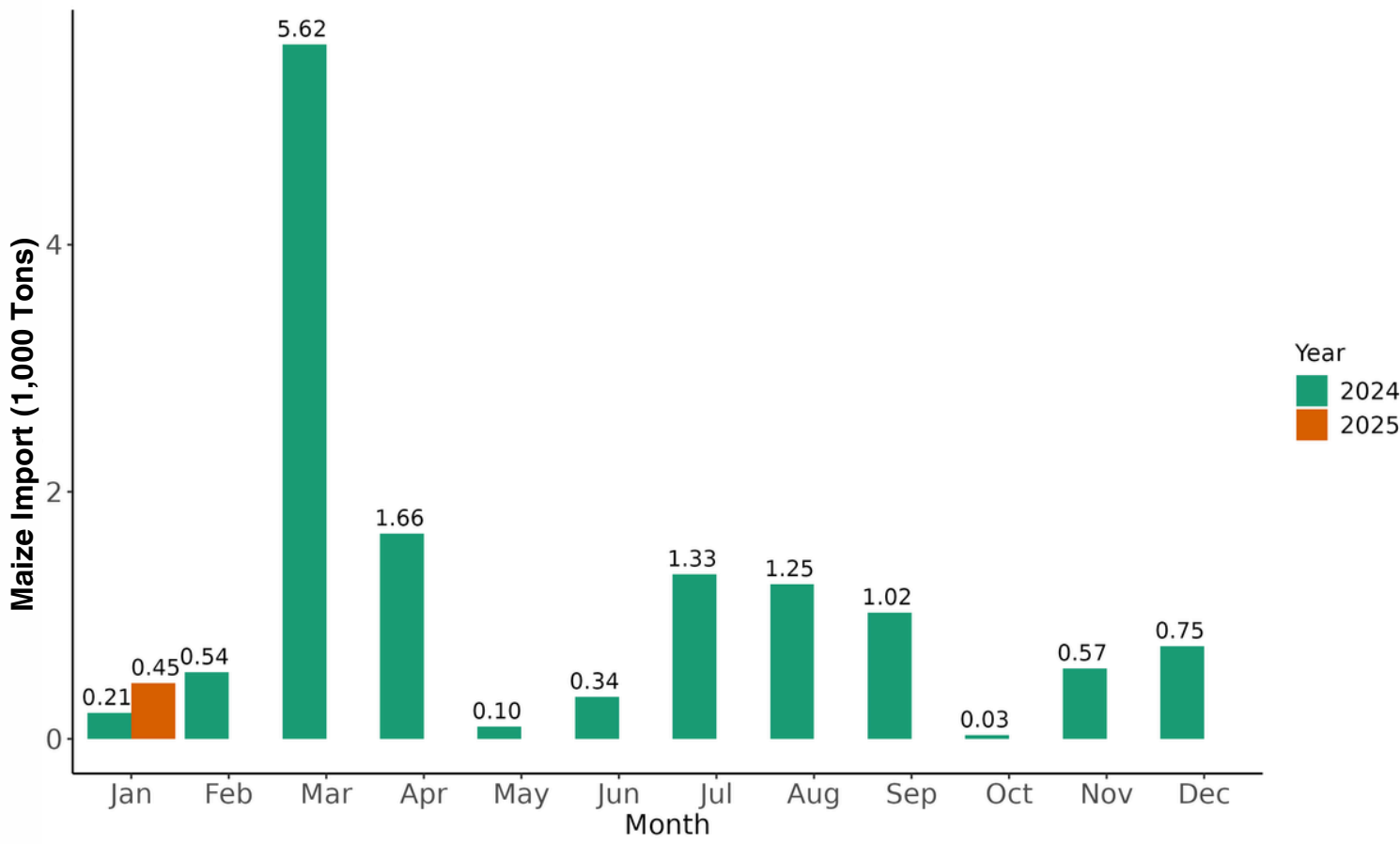


Figure 18: Monthly quantity of maize import in 2024–2025

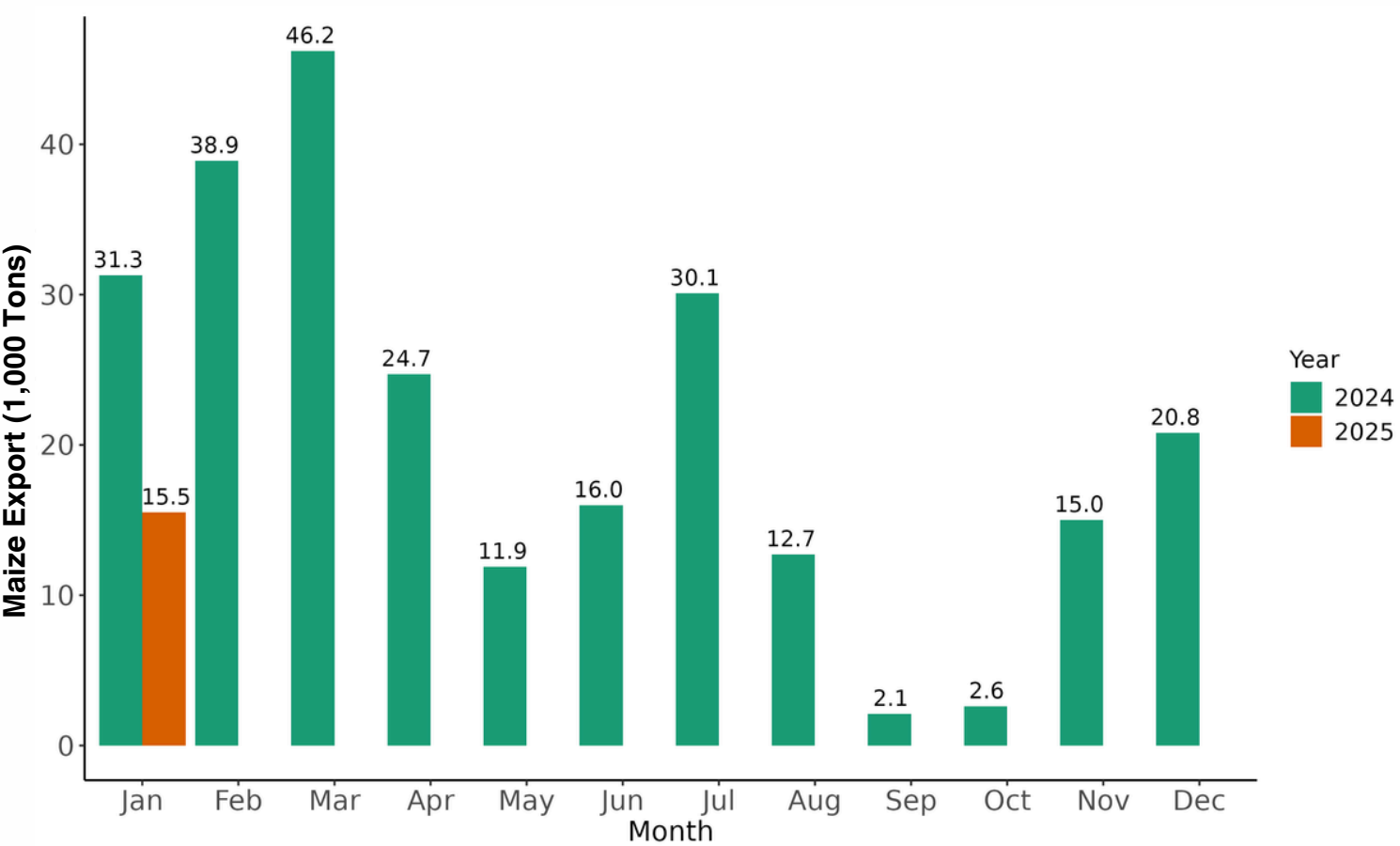


Figure 19: Monthly quantity of maize export in 2024–2025

For sugarcane crops in crop year 2024/2025, the planted area is forecasted to decrease due to rising prices of competing crops and government policies focusing on the production of other crops, including vegetables and perishable crops for consumption. Additionally, the sugarcane production is expected to decline attributing to the reduction in planted area. The sugarcane harvest period will begin from January 2025 to May 2025. Regarding sugar trade, imports of sugar are forecasted to decrease (Figure 20) due to declining domestic demand, while exports of sugar are expected to decrease (Figure 21) due to lower domestic production of sugar production.

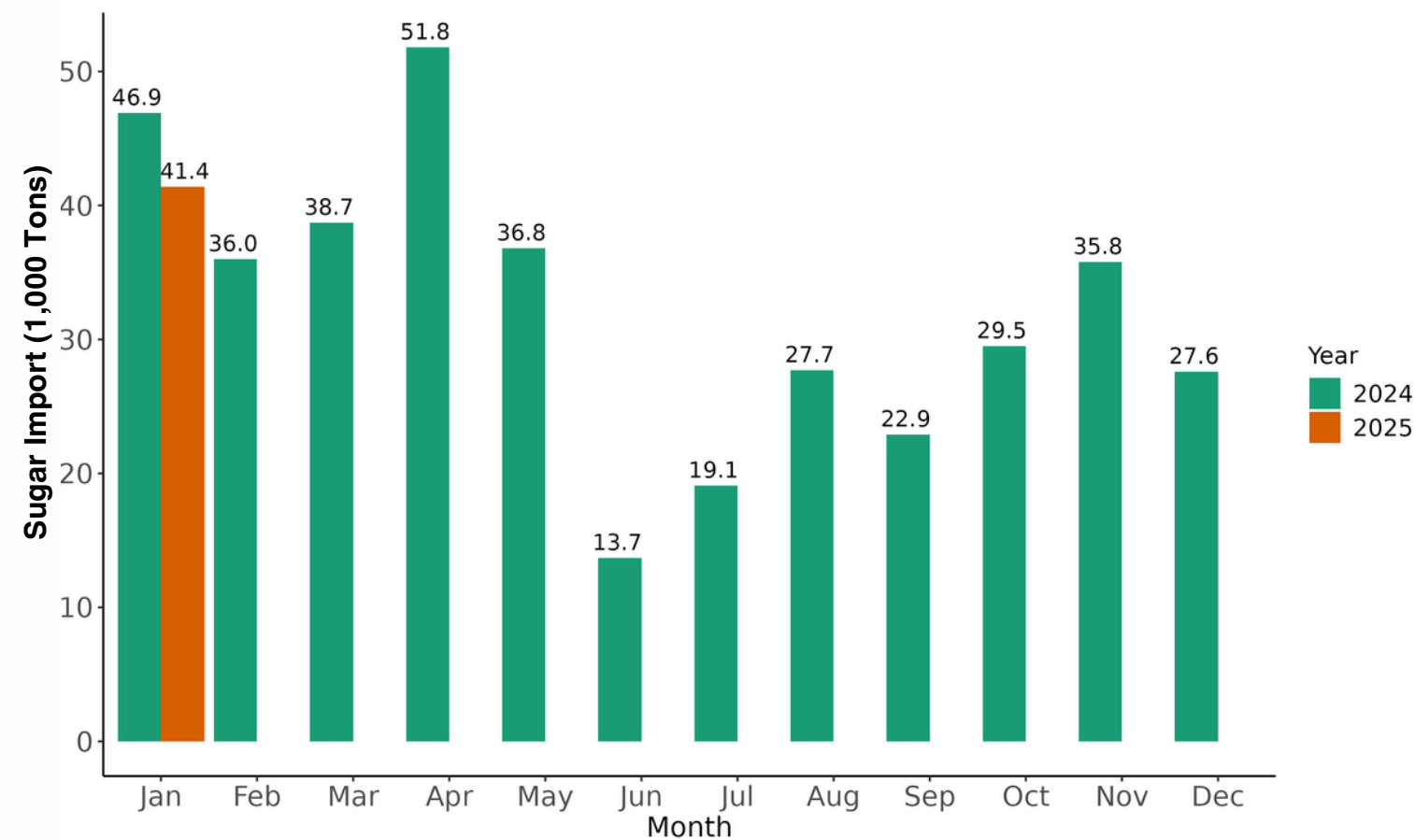


Figure 20: Monthly quantity of sugar import in 2024–2025

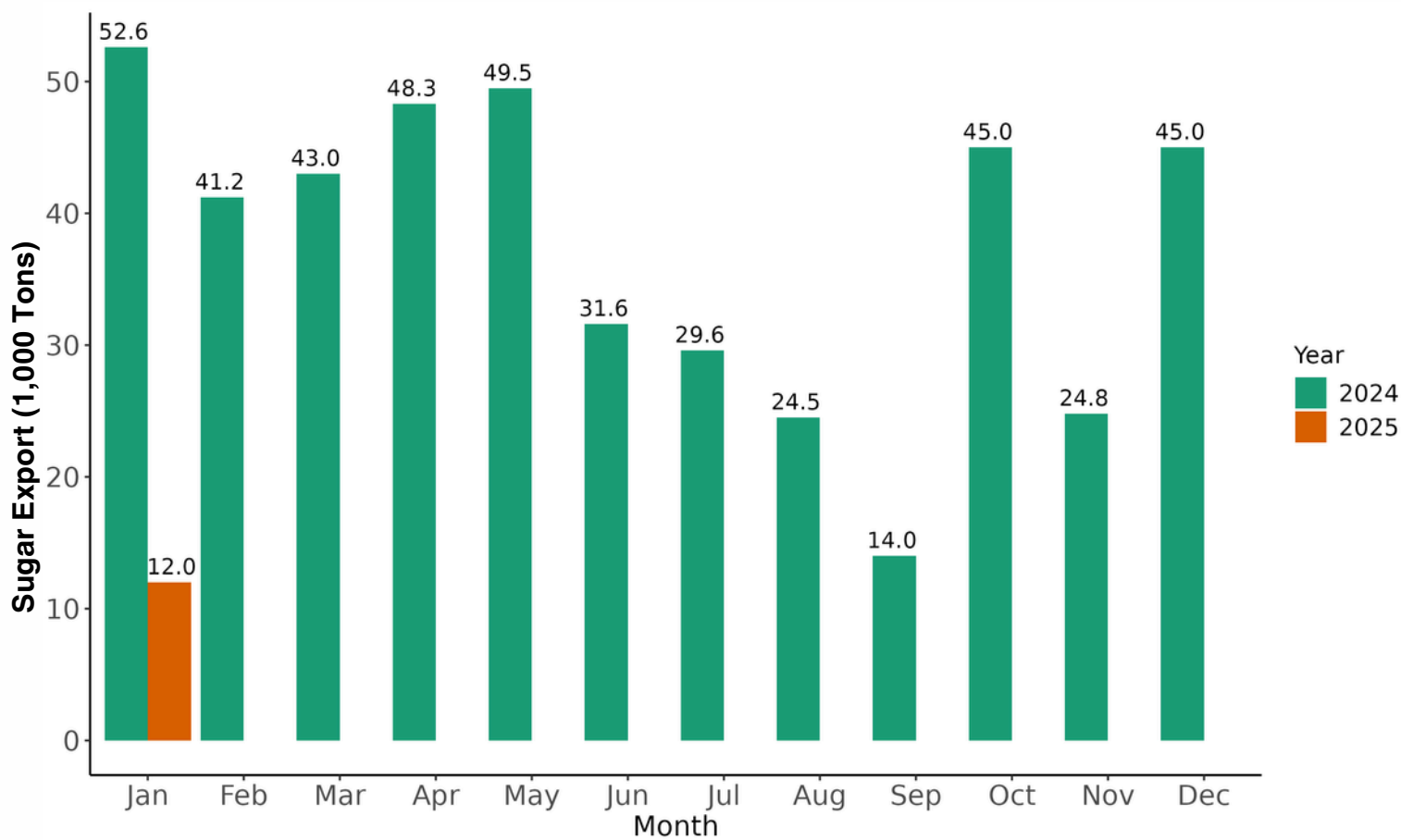


Figure 21: Monthly quantity of sugar export in 2024–2025

For soybeans crops in crop year 2024/2025, the planted area is forecasted to increase as farmers will respond to rising soybean prices and favorable weather conditions such as sufficient sunlight. Additionally, the soybean production is expected to increase attributing to favorable weather conditions, good crop management, and the use of quality soybean varieties. The soybean harvest period for the wet season began from September 2024 to November 2024, while the dry season harvest will begin from February 2025 to March 2025. Regarding soybean trade, imports are forecasted to increase (Figure 22) due to rising domestic demand, while exports are expected to decrease (Figure 23) due to rising domestic consumption.

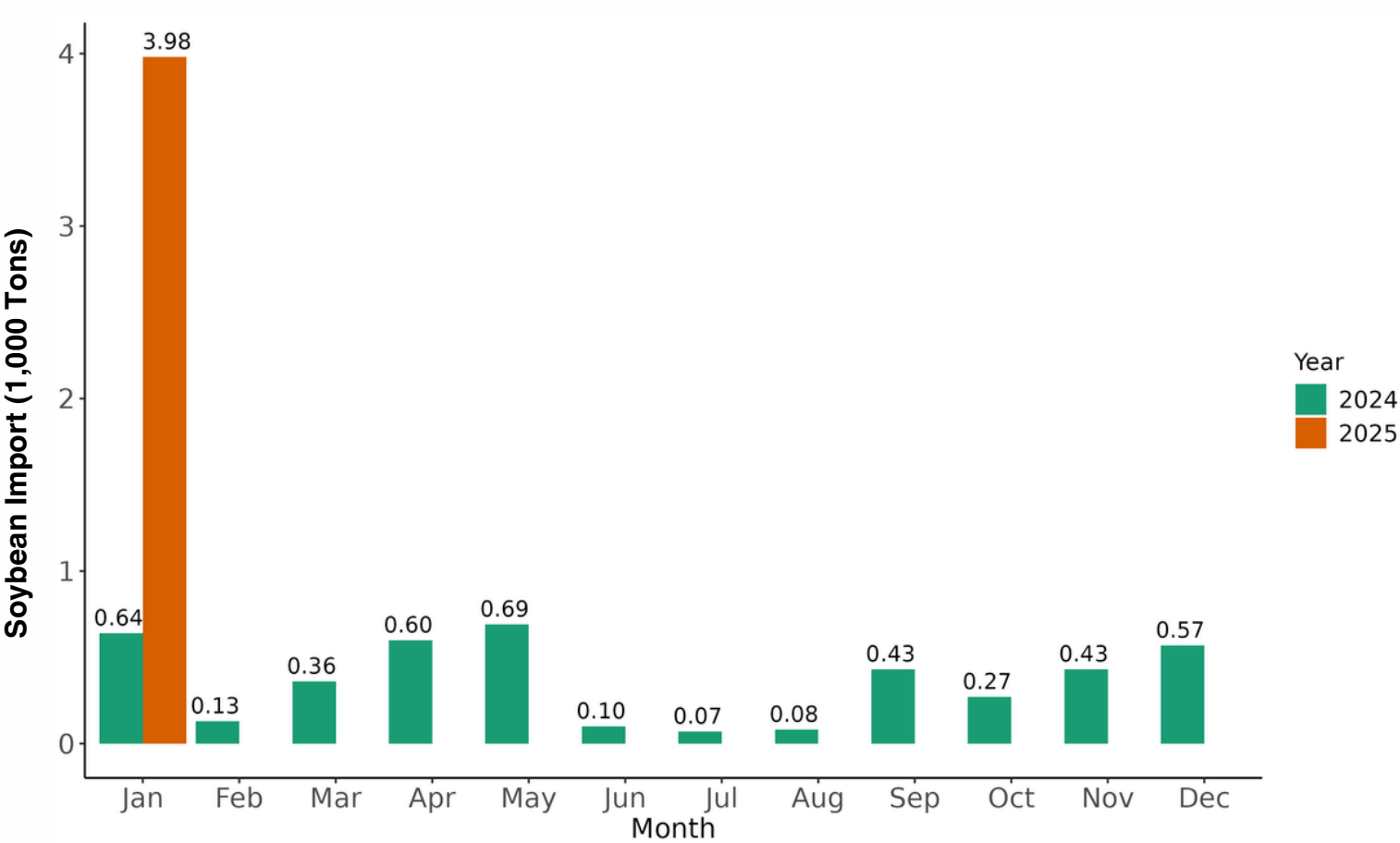


Figure 22: Monthly quantity of soybean import in 2024–2025

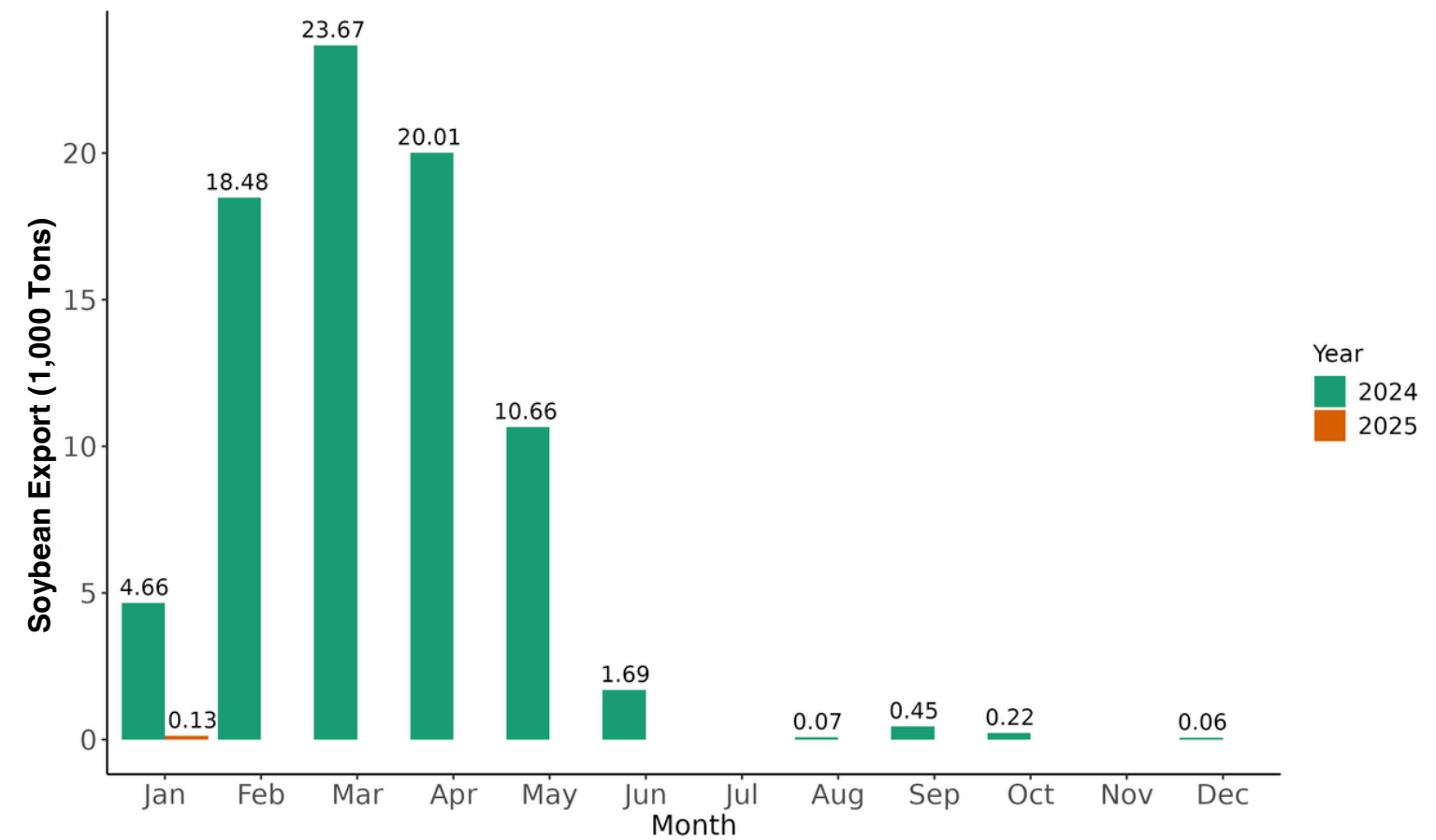


Figure 23: Monthly quantity of soybean export in 2024–2025

For cassava crops in crop year 2024/2025, the planted area is forecasted to decrease as farmers will respond to falling cassava prices, rising prices of competing crops, and government policies focusing on the production of other crops, including vegetables and perishable crops for consumption. Additionally, the cassava production is expected to decline attributing to the reduction in planted area. The cassava harvest period has begun from December 2024 to May 2025. Regarding cassava trade, imports are forecasted to increase (Figure 24) due to declining domestic production, while exports are expected to increase (Figure 25) due to rising demand from trading countries.

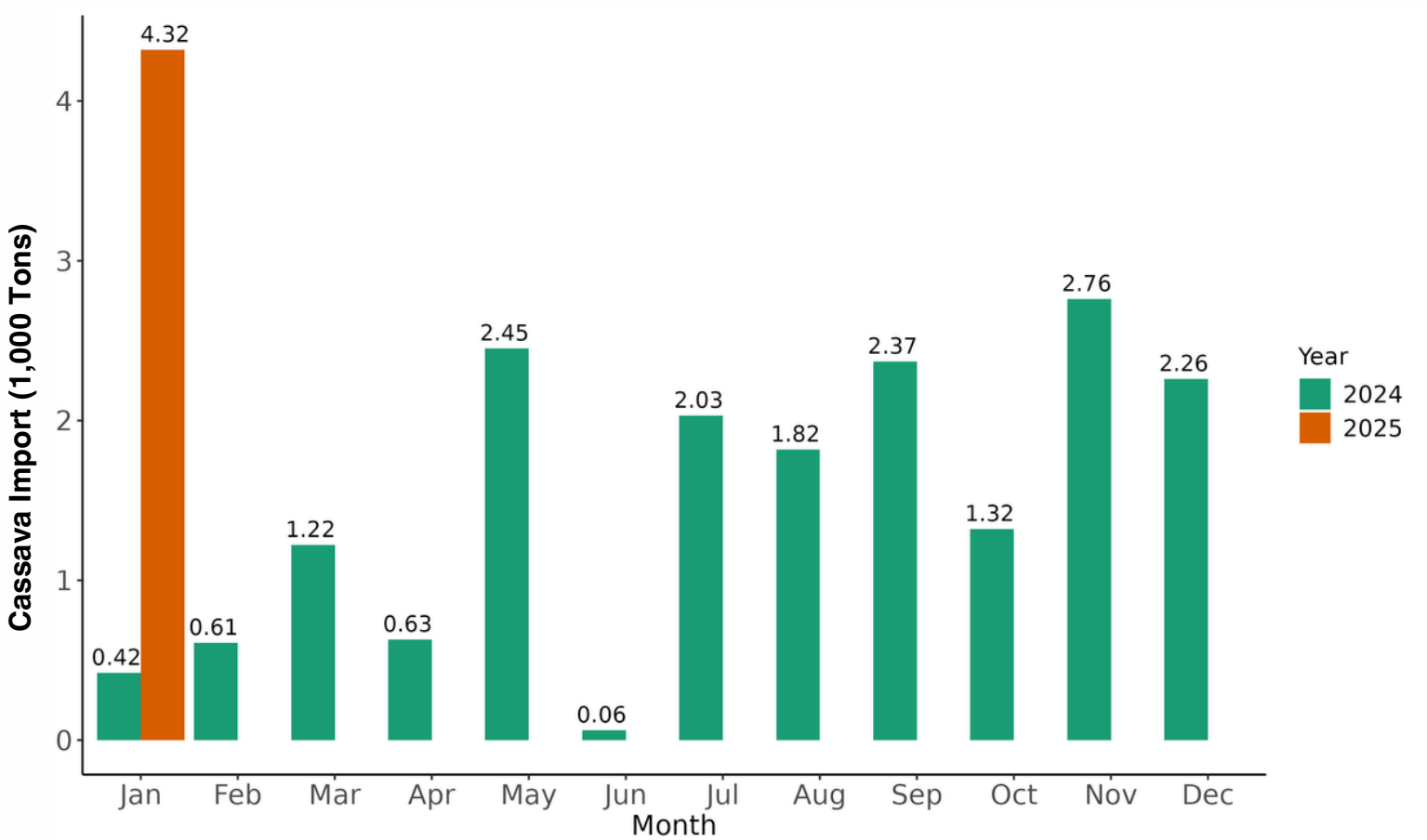


Figure 24: Monthly quantity of cassava import in 2024–2025

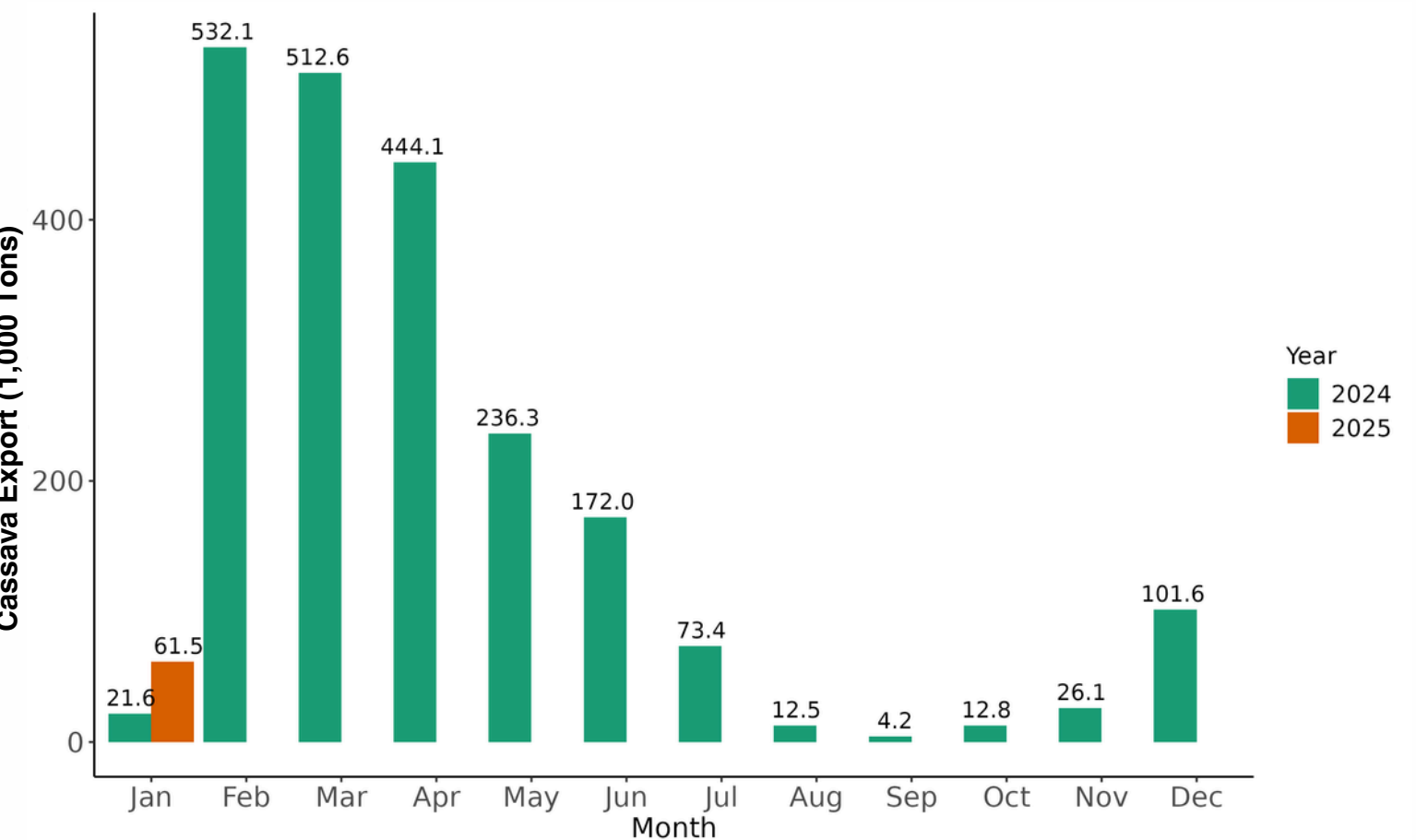


Figure 25: Monthly quantity of cassava export in 2024–2025

Crop Situation of Malaysia in Crop Year 2024/2025



Malaysia situation in crop year 2024/2025

The information on weather conditions in Malaysia for crop year 2024/2025 is still limited. However, the country may experience climate change effects, such as extreme drought conditions (El Niño) alternating with heavy rainfall (La Niña) throughout the year. Some natural disaster information has been reported, particularly concerning the agricultural sector. Floods have affected the agricultural areas in Kelantan, Terengganu, Kedah, Perlis, Pulau Pinang, Pahang, Negeri Sembilan, Melaka, Johor, Selangor, and Sabah, while droughts have impacted Kelantan, Kedah, Perak, and Melaka. These events have been reported to affect rice crops around 26,603.70 hectares.

The situations of five main crops are as follows:

For rice and cassava crops in crop year 2024/2025, the forecasted planted area and production may change due to the impact of disaster situations. For the rice harvest period, the wet season harvest has begun from November 2024 to May 2025, while the dry season harvest will begin from June 2025 to October 2025. The cassava harvest period will run from January 2025 to December 2025.

Regarding the trade of five commodities:

For rice trade, rice imports are forecasted to decrease (Figure 26), particularly for white rice, due to expected improvements in domestic production. However, rice exports are also expected to decrease (Figure 27) as more locally produced rice is allocated for domestic consumption in line with food security priorities.

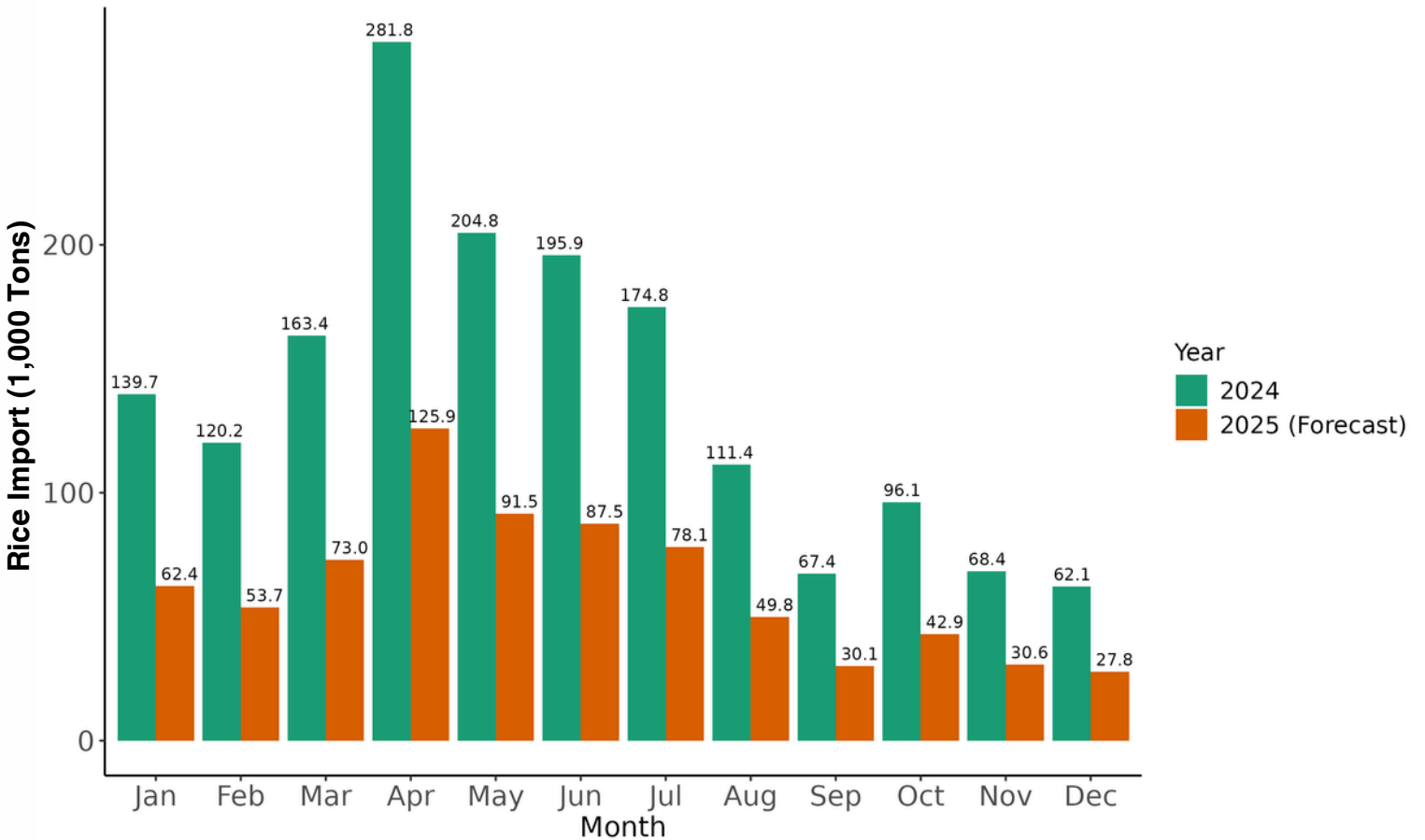


Figure 26: Monthly quantity of rice import in 2024–2025 (forecast)

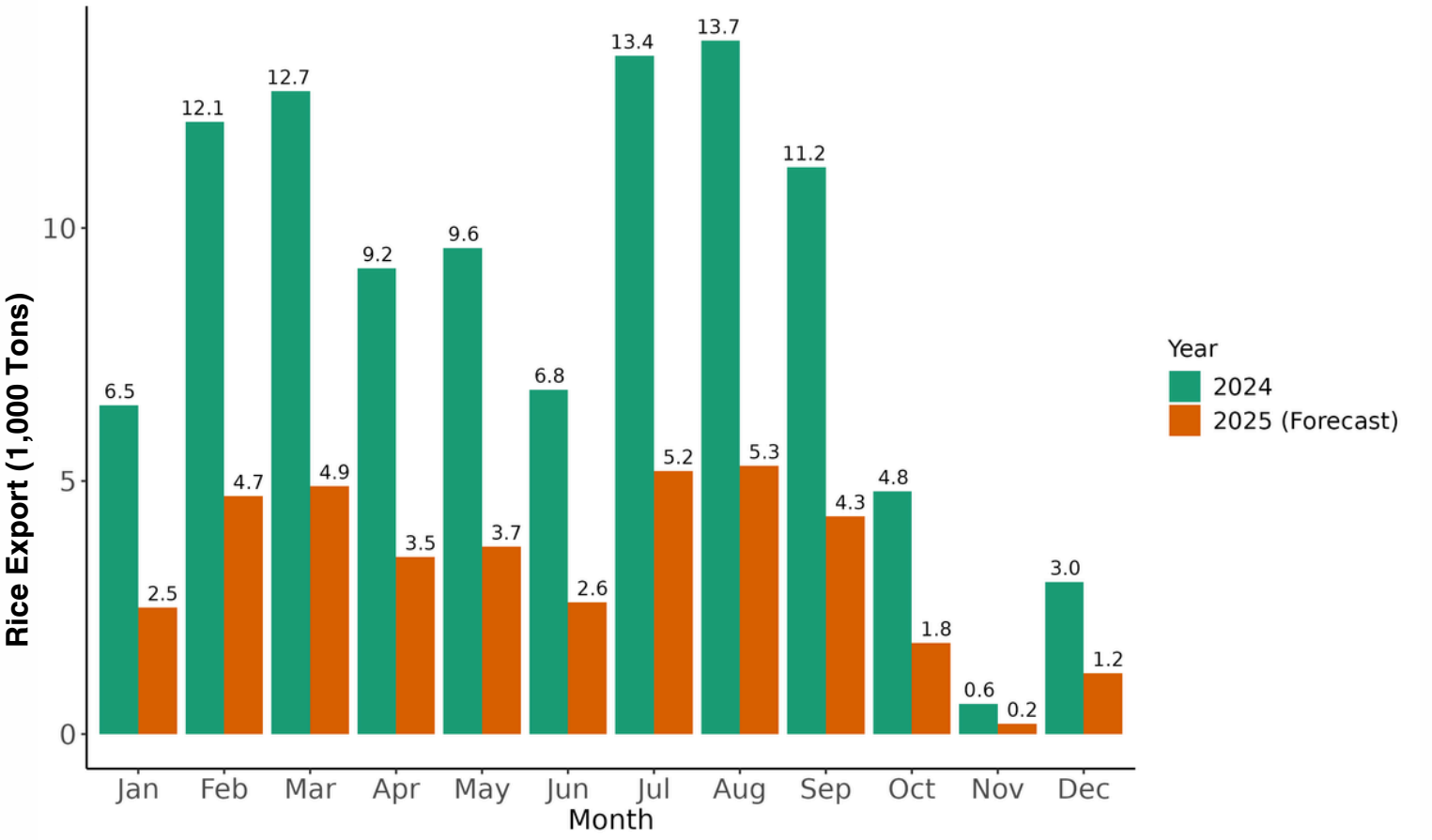


Figure 27: Monthly quantity of rice export in 2024–2025 (forecast)

For maize trade, maize imports are forecasted to decrease (Figure 28) as both the government and private sector may invest in increasing local maize production to reduce dependency on imports. Maize exports are also forecasted to decrease (Figure 29) to ensure sufficient stock for animal feed and the food industry.

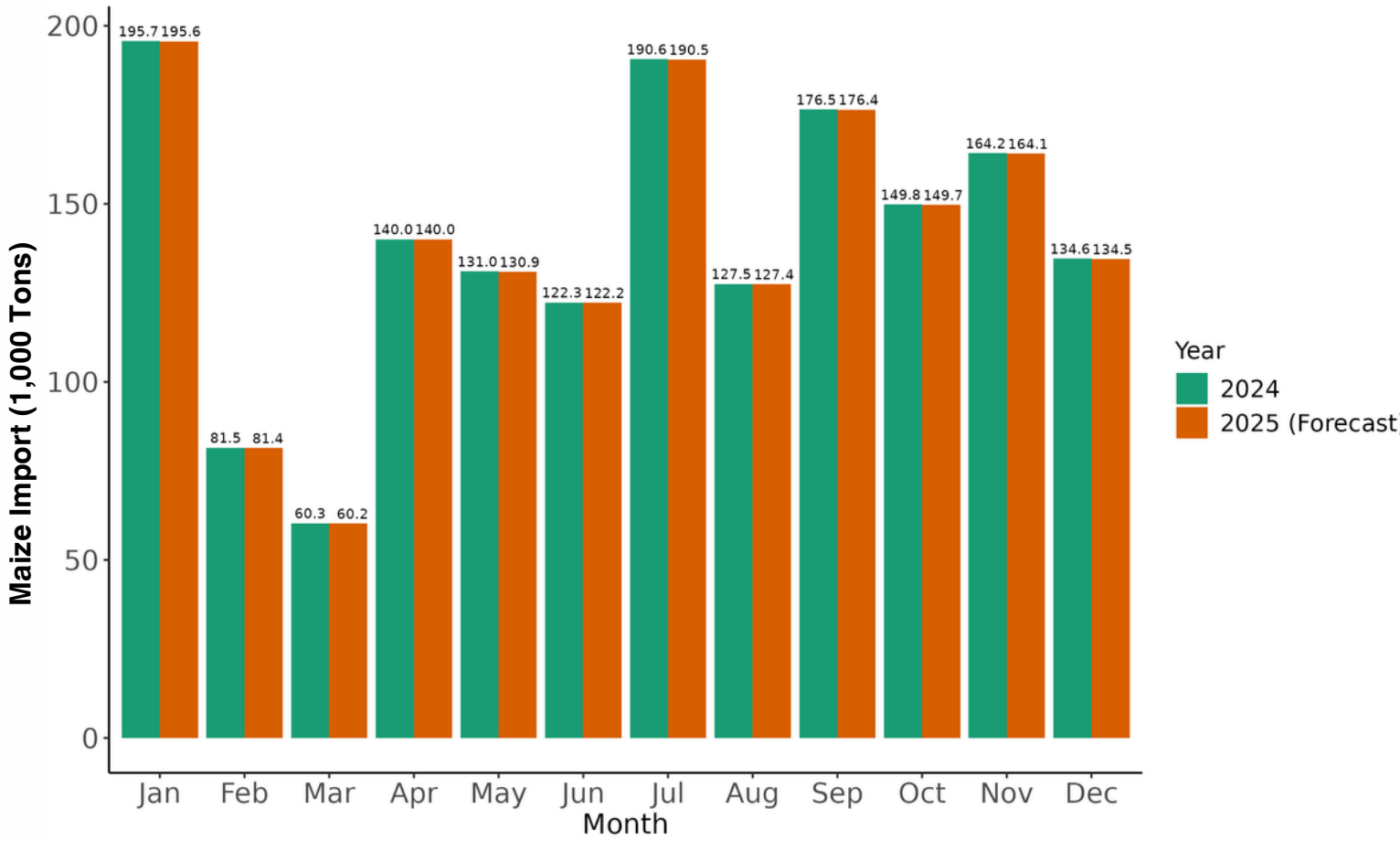


Figure 28: Monthly quantity of maize import in 2024–2025 (forecast)

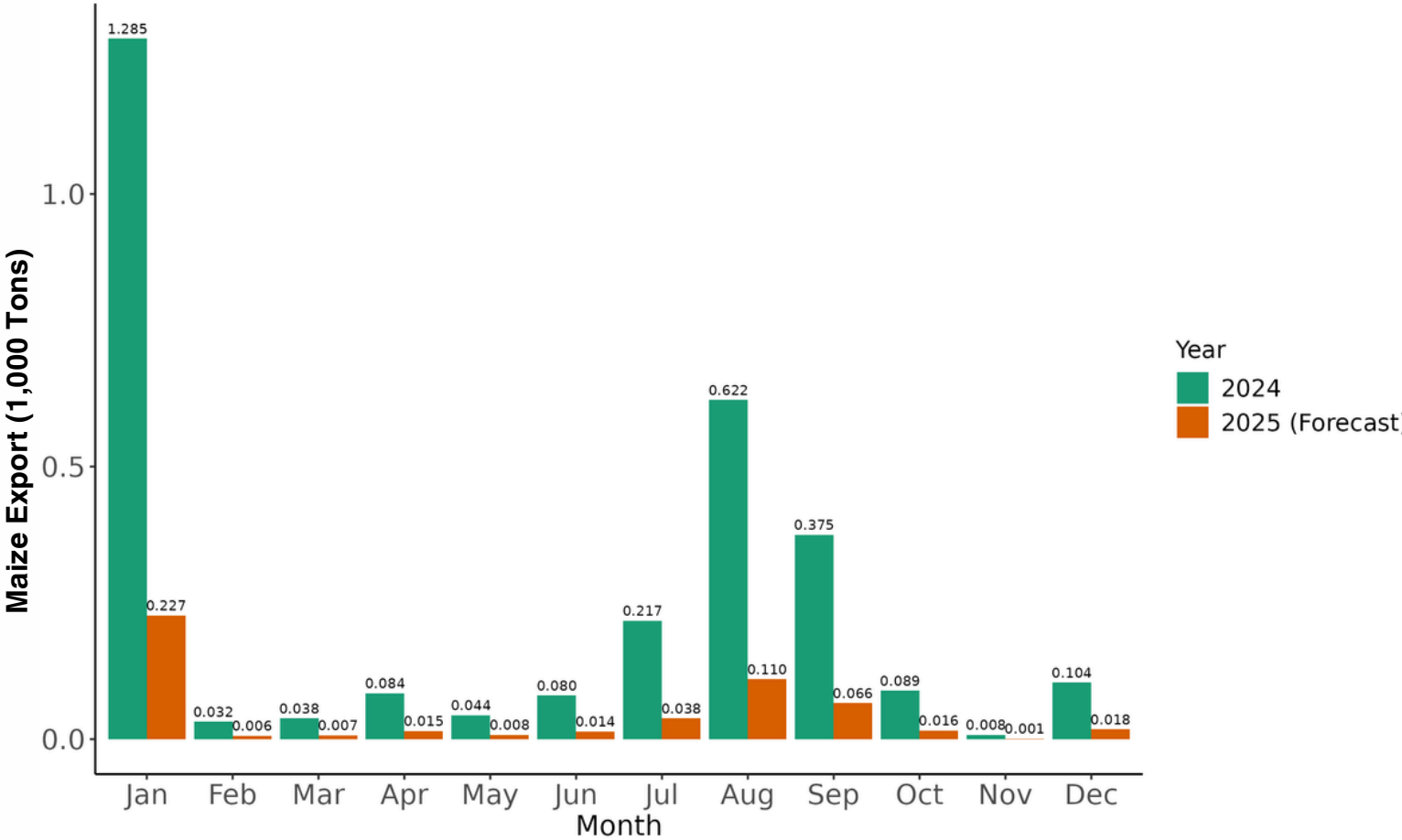


Figure 29: Monthly quantity of maize export in 2024–2025 (forecast)

For **sugar trade**, sugar imports are forecasted to increase (Figure 30), as Malaysia relies on imported raw sugar for refining due to insufficient local sugarcane production to meet demand. However, sugar exports are forecasted to decrease (Figure 31) because Malaysia is not a major sugarcane producer and depends on imported raw materials for sugar production leading to limit export potential.

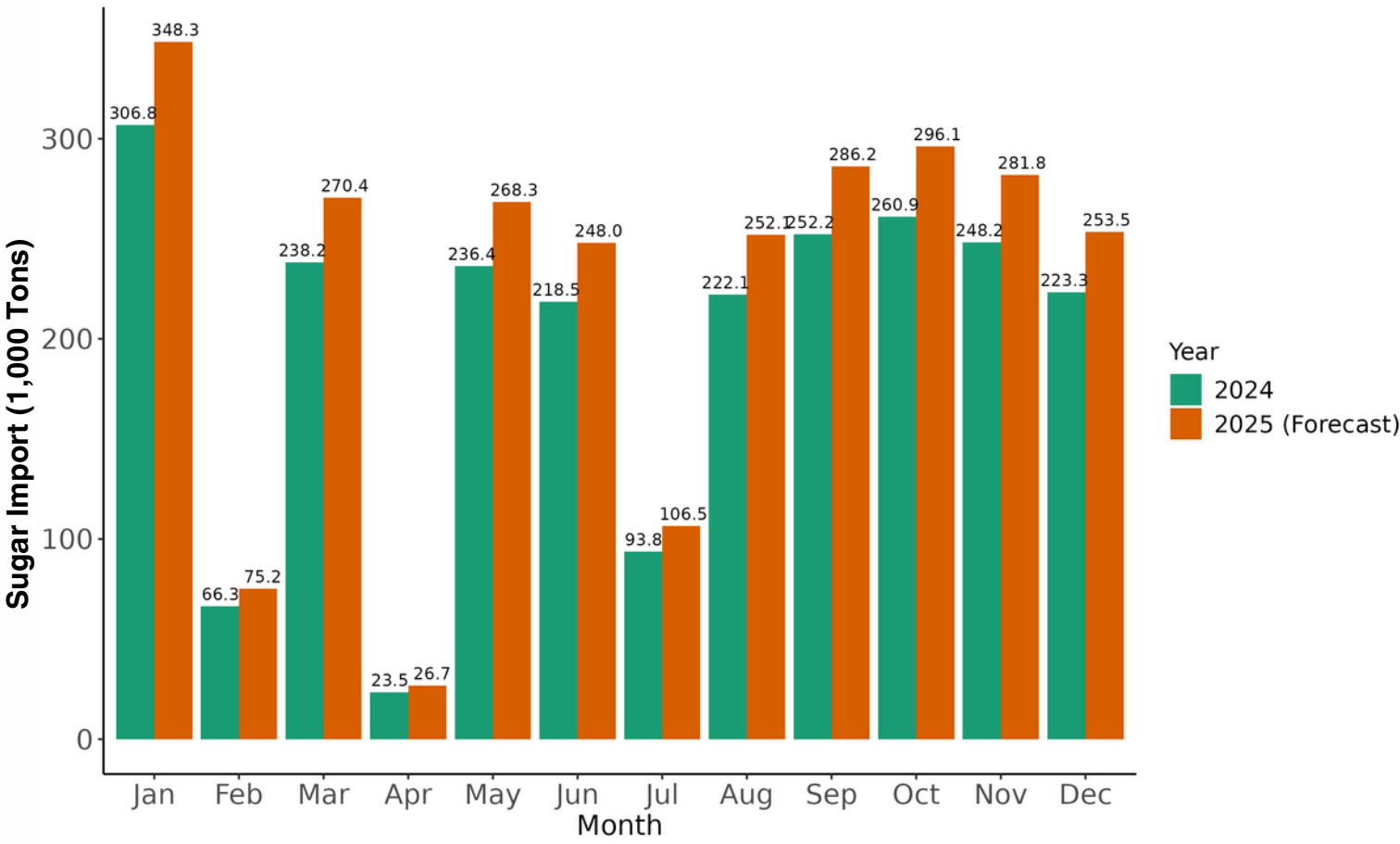


Figure 30: Monthly quantity of sugar import in 2024–2025 (forecast)

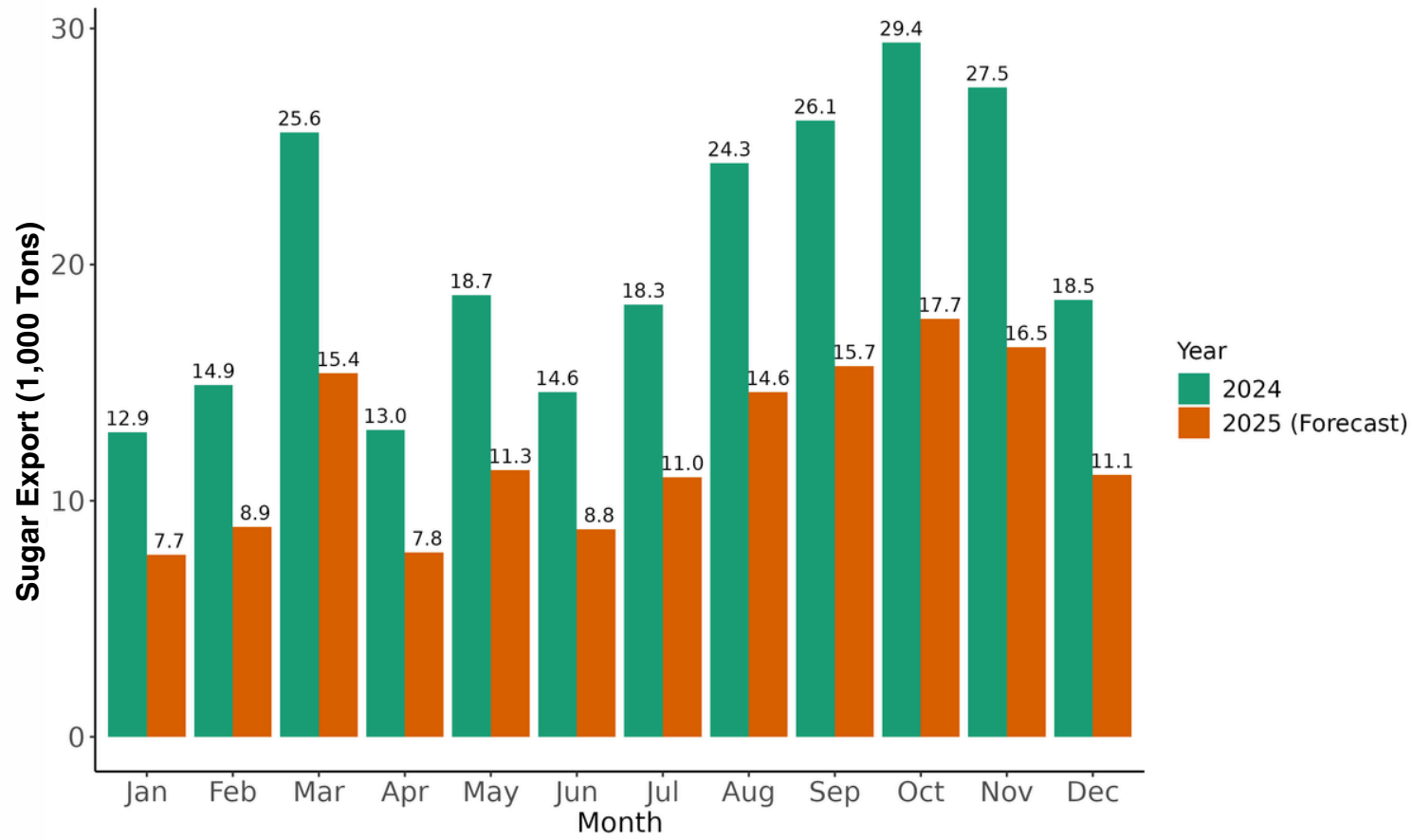


Figure 31: Monthly quantity of sugar export in 2024–2025 (forecast)

For **soybean trade**, soybean imports are expected to increase (Figure 32) because soybean meal is one of the ingredient in animal feed in this country. As the poultry and livestock sectors grow, the demand for soybean production is also expected to rise. However, soybean exports are forecasted to decrease (Figure 33) as soybeans are widely used in food processing and animal feed, leading to higher local consumption and reduced availability for export.

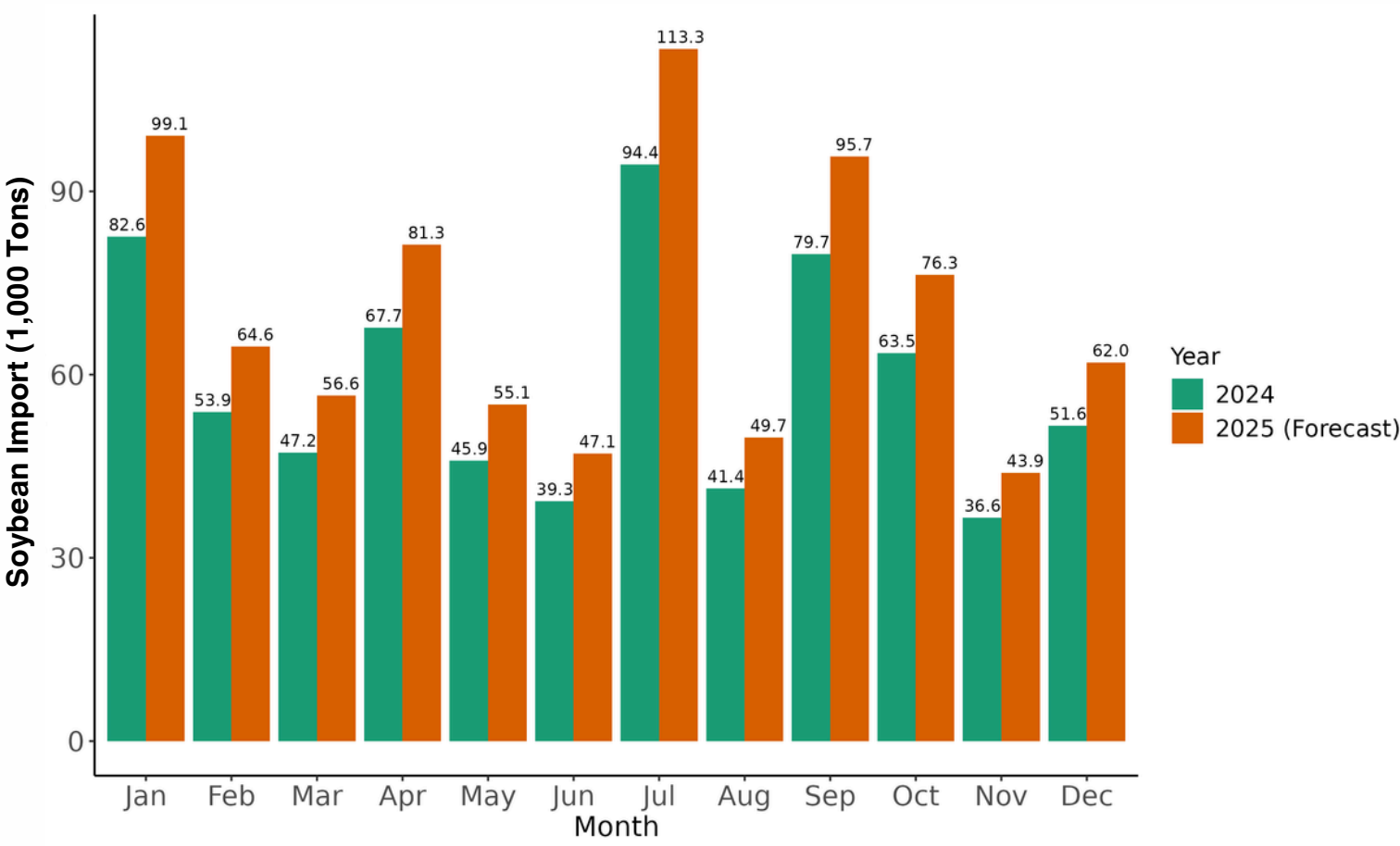


Figure 32: Monthly quantity of soybean import in 2024–2025 (forecast)

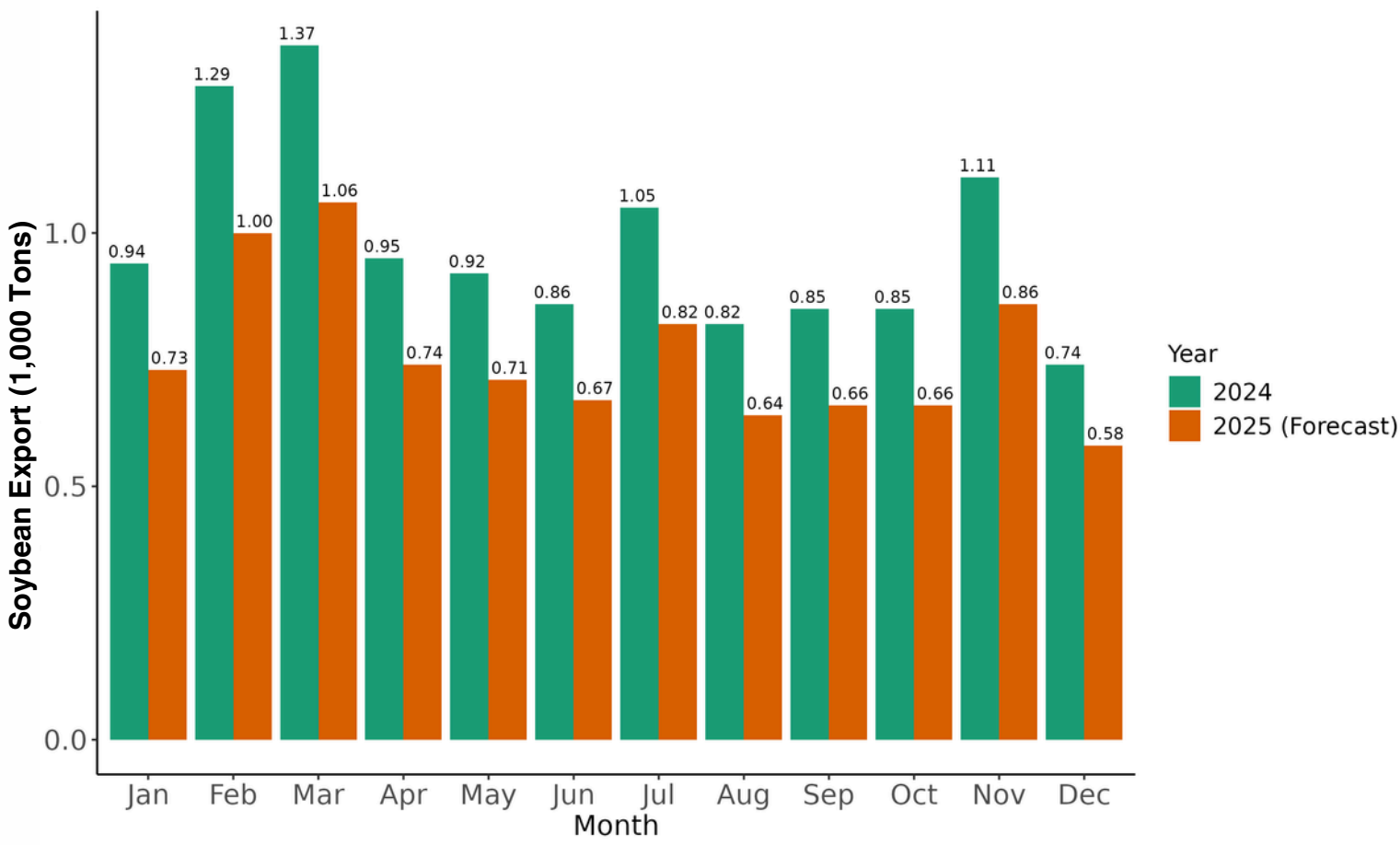


Figure 33: Monthly quantity of soybean export in 2024–2025 (forecast)

For **cassava trade**, cassava imports are forecasted to increase (Figure 34). Meanwhile, cassava exports are also forecasted to increase (Figure 35) due to rising demand from other countries.

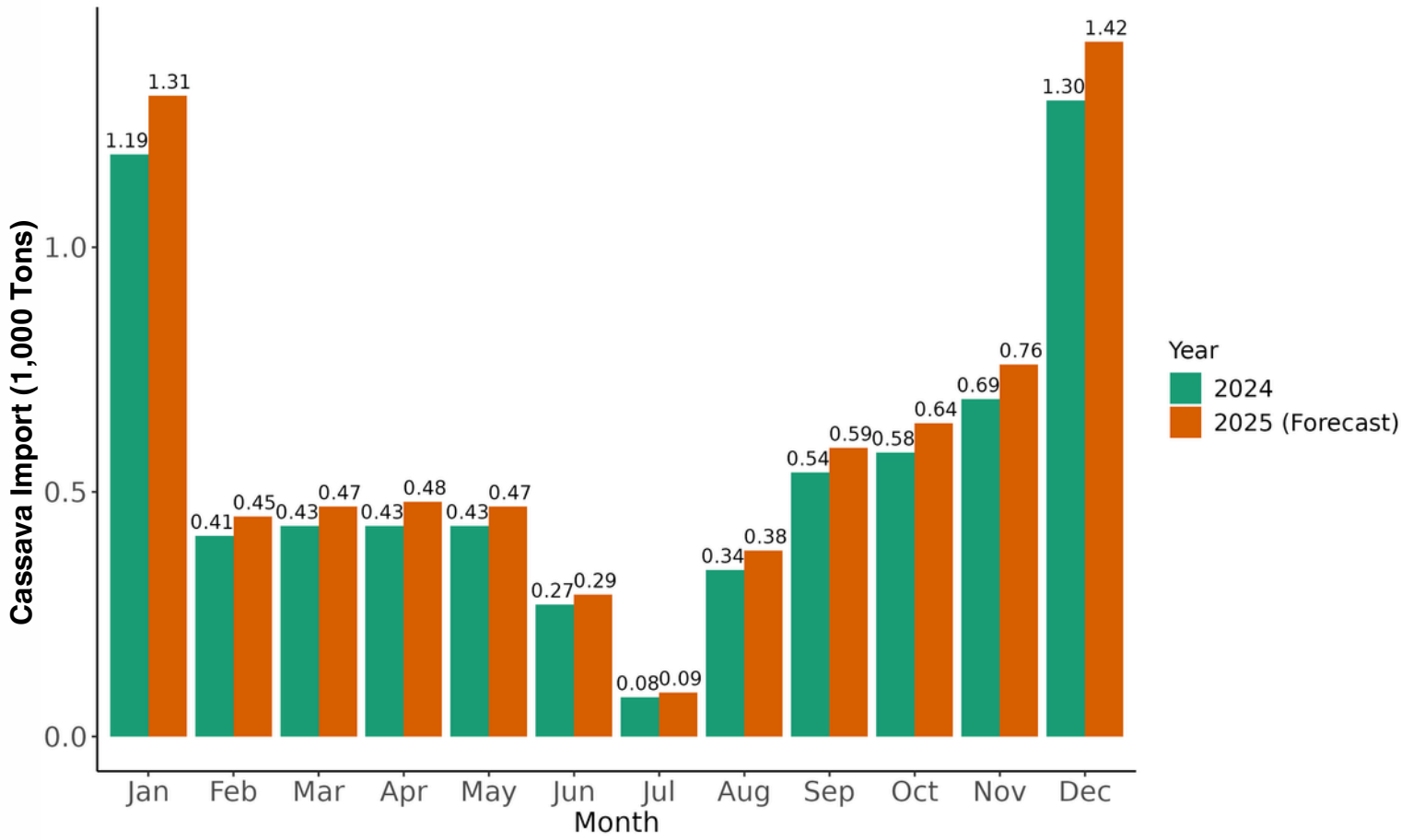


Figure 34: Monthly quantity of cassava import in 2024–2025 (forecast)

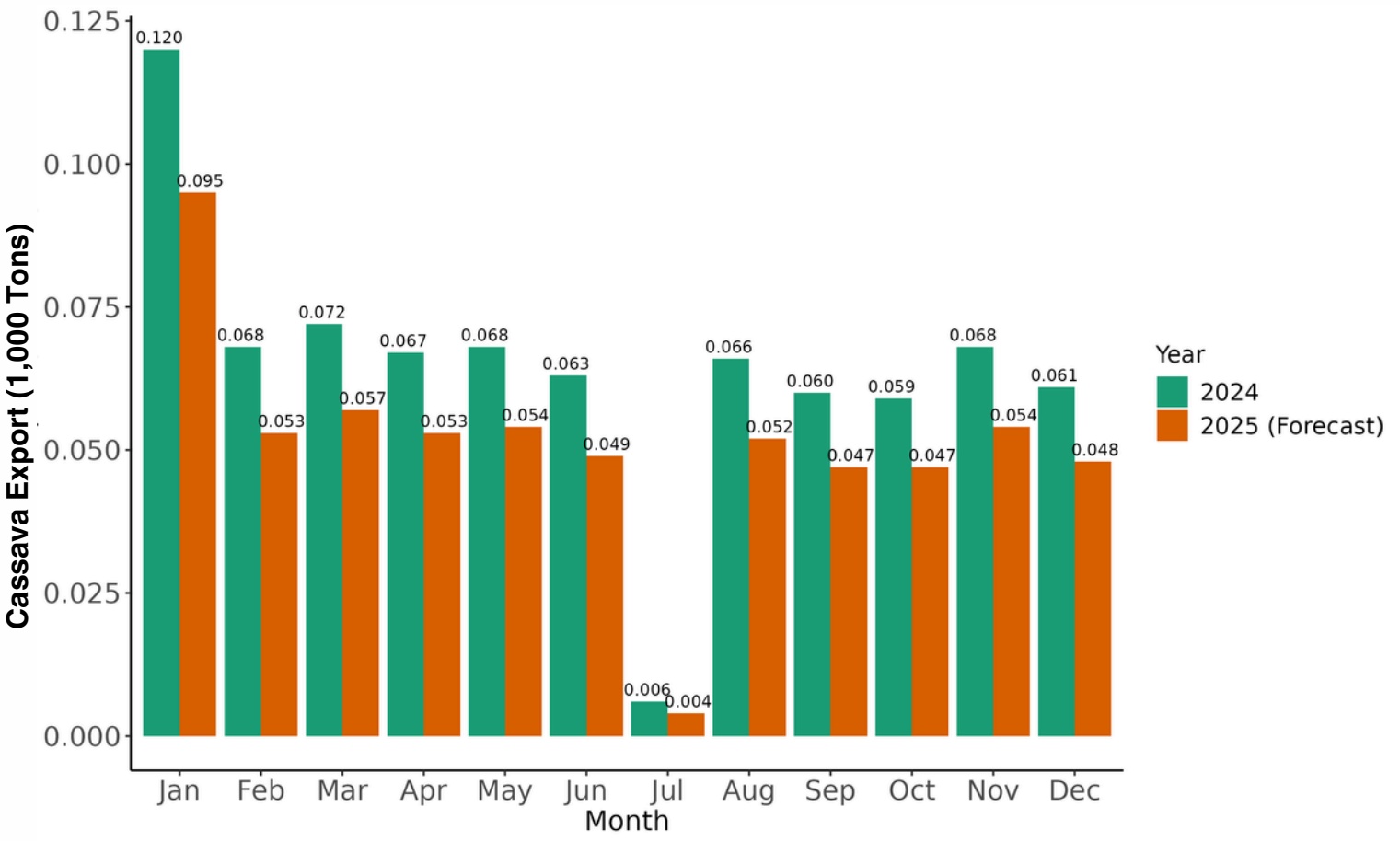


Figure 35: Monthly quantity of cassava export in 2024–2025 (forecast)

Crop Situation of Myanmar in Crop Year 2024/2025



Myanmar situation in crop year 2024/2025

Myanmar is expected to experience generally favorable weather conditions in crop year 2024/2025, with sufficient water resources to meet agricultural crop needs, including irrigation supply, and adequate sunlight for plant growth. Regarding rainfall in 2025, Myanmar is projected to receive moderate rainfall (20-50 mm/day). However, the country is also being impacted by climate change and global warming, leading to hotter-than-usual temperatures during both the day and night.

As a result of climate change, farmers are facing challenges in crop production. Some areas have been reported its effect by floods in Naypyitaw, Kachin, Kayin, Kayah, Sagaing, Tanintharyi, Bago, Magwe, Mandalay, Mon, Yangon, Shan, and Ayeyawaddy; landslides and mudslides in Shan and Naypyitaw; soil erosion due to water flow in Kachin; hailstorms in Sagaing; cliff collapses in Magwe; and sandslides in Ayeyawaddy.

These impacts have caused significant damage to agricultural crops, including 130,406.31 hectares of rice crops, 6,106.03 hectares of maize crops, 36.02 hectares of sugarcane crops, 571.02 hectares of soybean crops, and 418.86 hectares of cassava crops.

Despite these challenges, farmers are working in collaboration with the government to protect and manage their production. Farmers will adapt by adjusting cultivation plans and planting schedules, as well as using crop varieties resistant to climate change. The government is also implementing various policies to mitigate the risks and damage caused by natural disasters, including supporting new technologies and providing market access for farmers.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area and production data are not available. The rice harvest period for the wet season started in August 2024 and will continue until February 2025, while the dry season harvest will begin from February 2025 to August 2025. Regarding rice trade, no rice imports were reported in 2024. The export of rice was high in the first quarter, reaching around 220,049 tons, and then steadily declined to between 132,206 tons to 30,885 by mid-2024. The export market is expected to recover with exports peaking again in the fourth quarter of 2024 and the first quarter of 2025 (Figure 36).

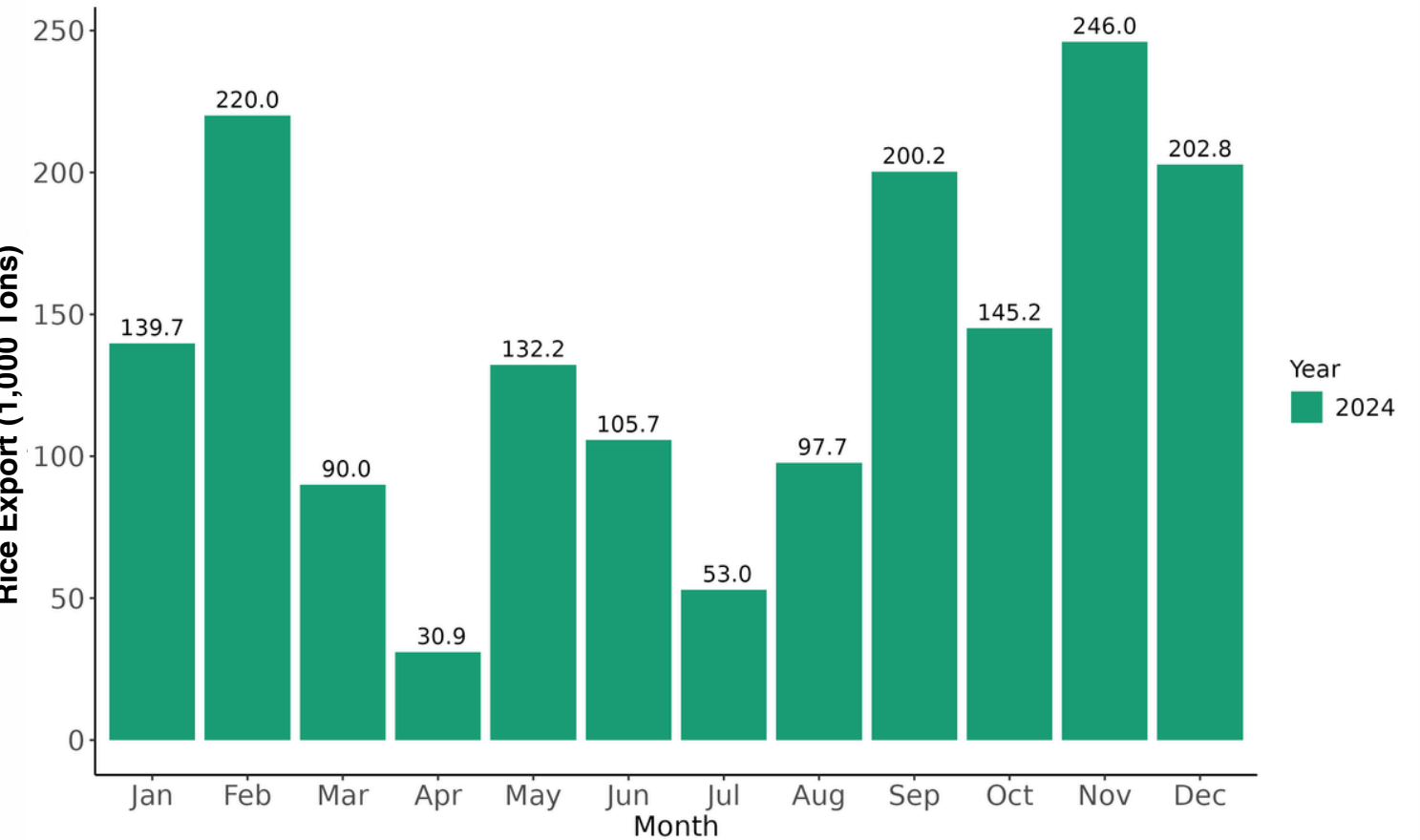


Figure 36: Monthly quantity of rice export in 2024

For maize crops in crop year 2024/2025, data on planted area and production are not available. The maize harvest period for the wet season began in August 2024 and ended in December 2024, while the dry season harvest will begin from January 2025 to May 2025. In terms of trade, maize imports fluctuated throughout 2024, peaking between 809 to 1,000 tons in the second and third quarters, before significantly decreasing. The import trend in 2025 is expected to follow the same pattern as 2024 (Figure 37). Maize exports increased from early 2024 until May 2024, after which exports decreased until November 2024 (Figure 38). It is expected that maize exports in 2025 will follow a similar pattern to 2024.

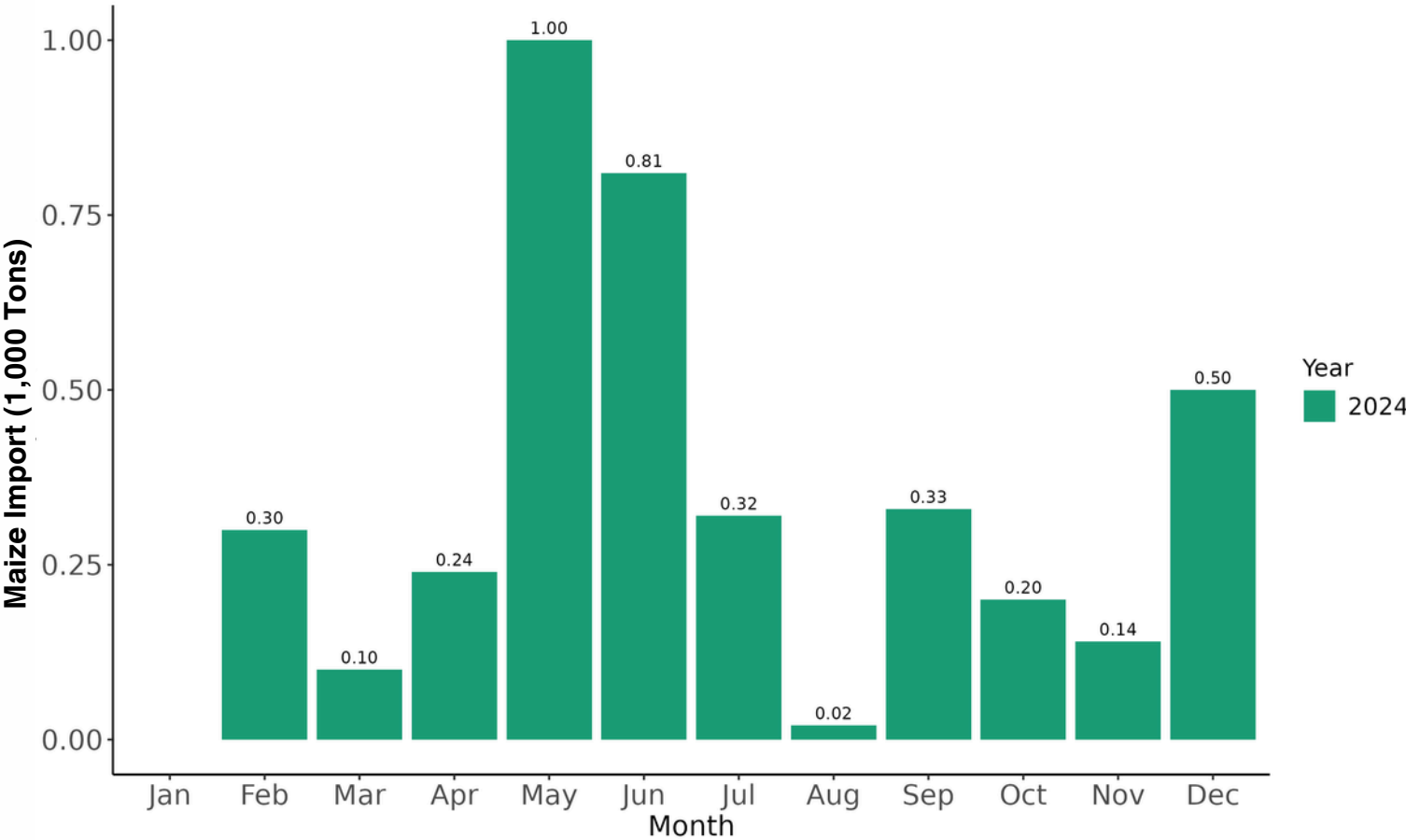


Figure 37: Monthly quantity of maize import in 2024

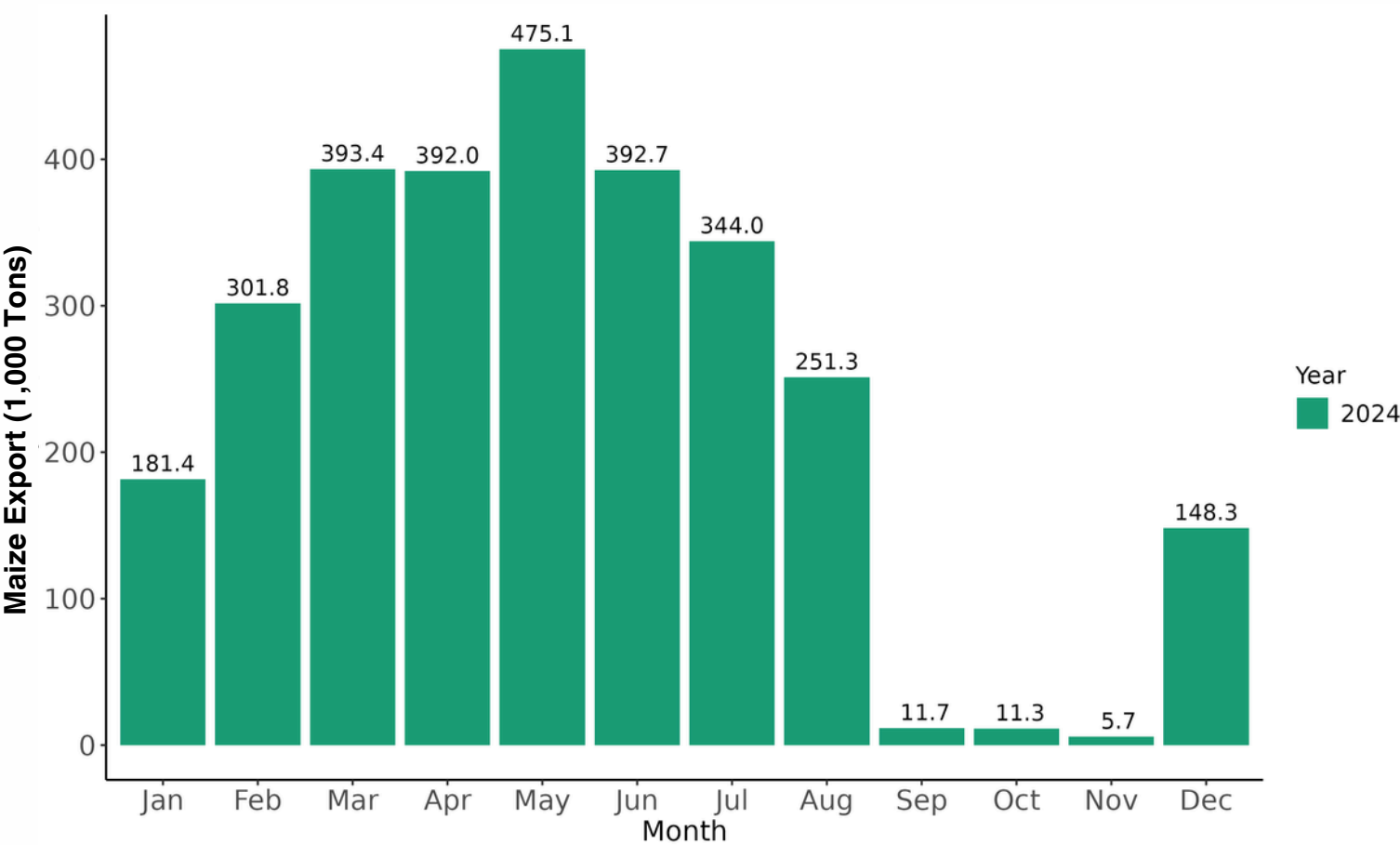


Figure 38: Monthly quantity of maize export in 2024

For sugarcane crops in crop year 2024/2025, data on planted area and production are not available. The sugarcane harvest period started in October 2024 and will continue until March 2025. Regarding sugar trade, no sugar imports were reported in 2024. Additionally, exports of sugar were high in the first quarter, ranging from 5,895 to 6,720 tons, but then significantly dropped to 870 tons in March 2024, and no further export data for sugar have been reported (Figure 39).

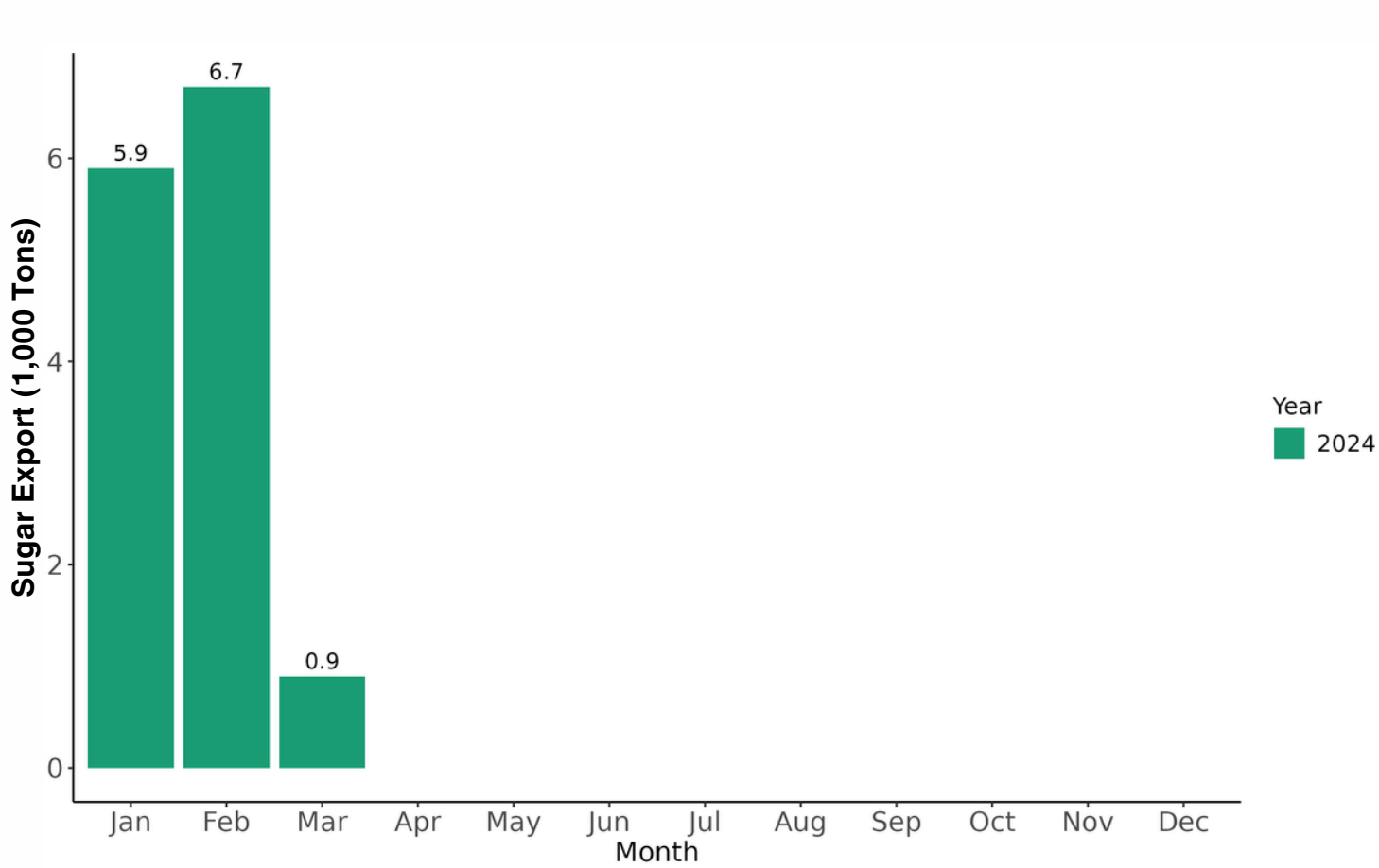


Figure 39: Monthly quantity of sugar export in 2024

For soybean crops in crop year 2024/2025, data on the planted area and soybean production are not available. The soybean harvest period for the wet season started from August 2024 and ended in December 2024, while the dry season harvest began in December 2024 and will continue through May 2025. Regarding soybean trade, soybean imports were observed 2 months of imports in the first and second quarters at 209 tons in January and 313 tons in May. Imports increased in the third quarter peaking at 265 tons in October 2024, and then dropping again through December 2024 (Figure 40). Additionally, soybean exports had only few exports for January (66 tons), February (154 tons), and October (20 tons) (Figure 41).

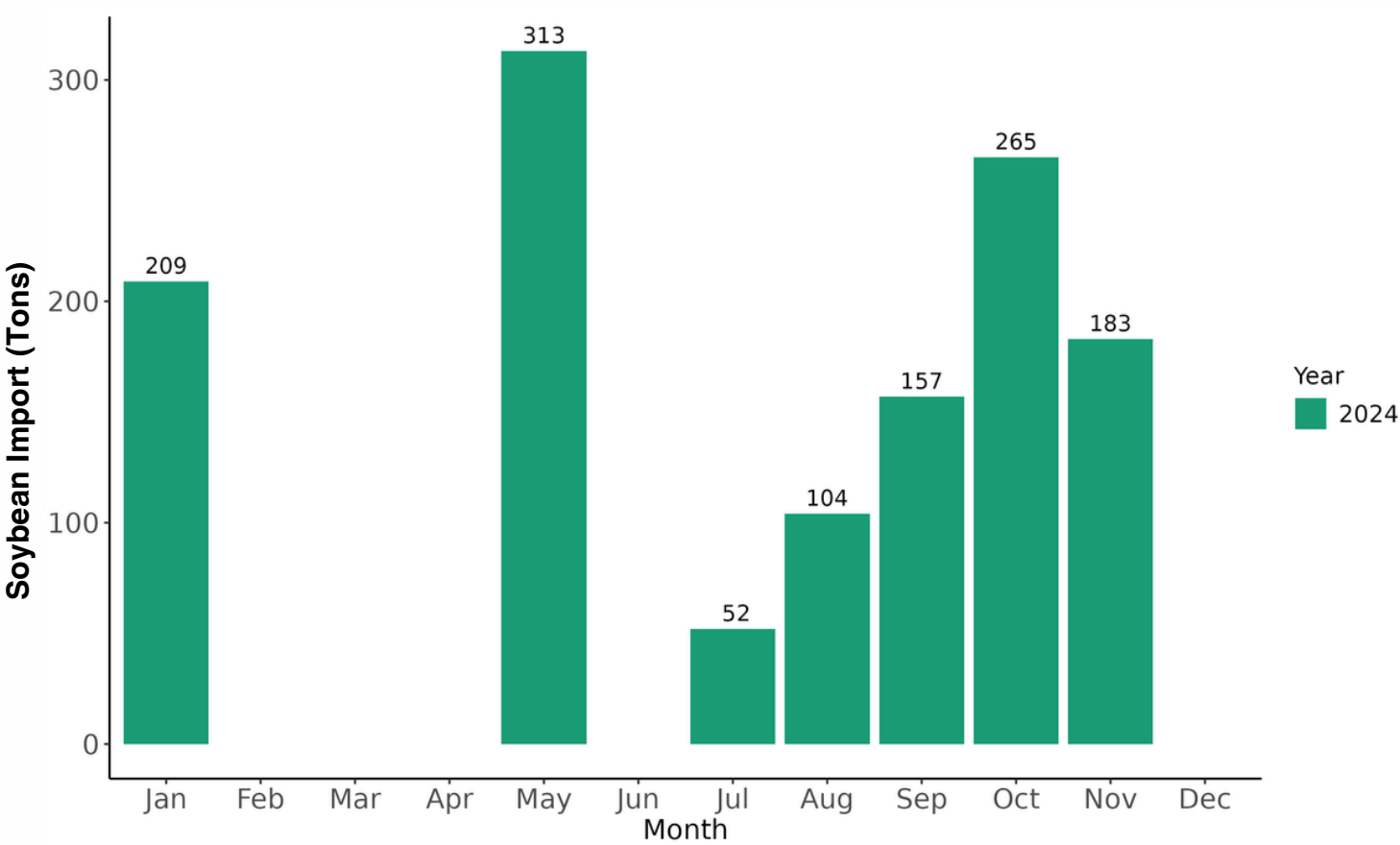


Figure 40: Monthly quantity of soybean import in 2024

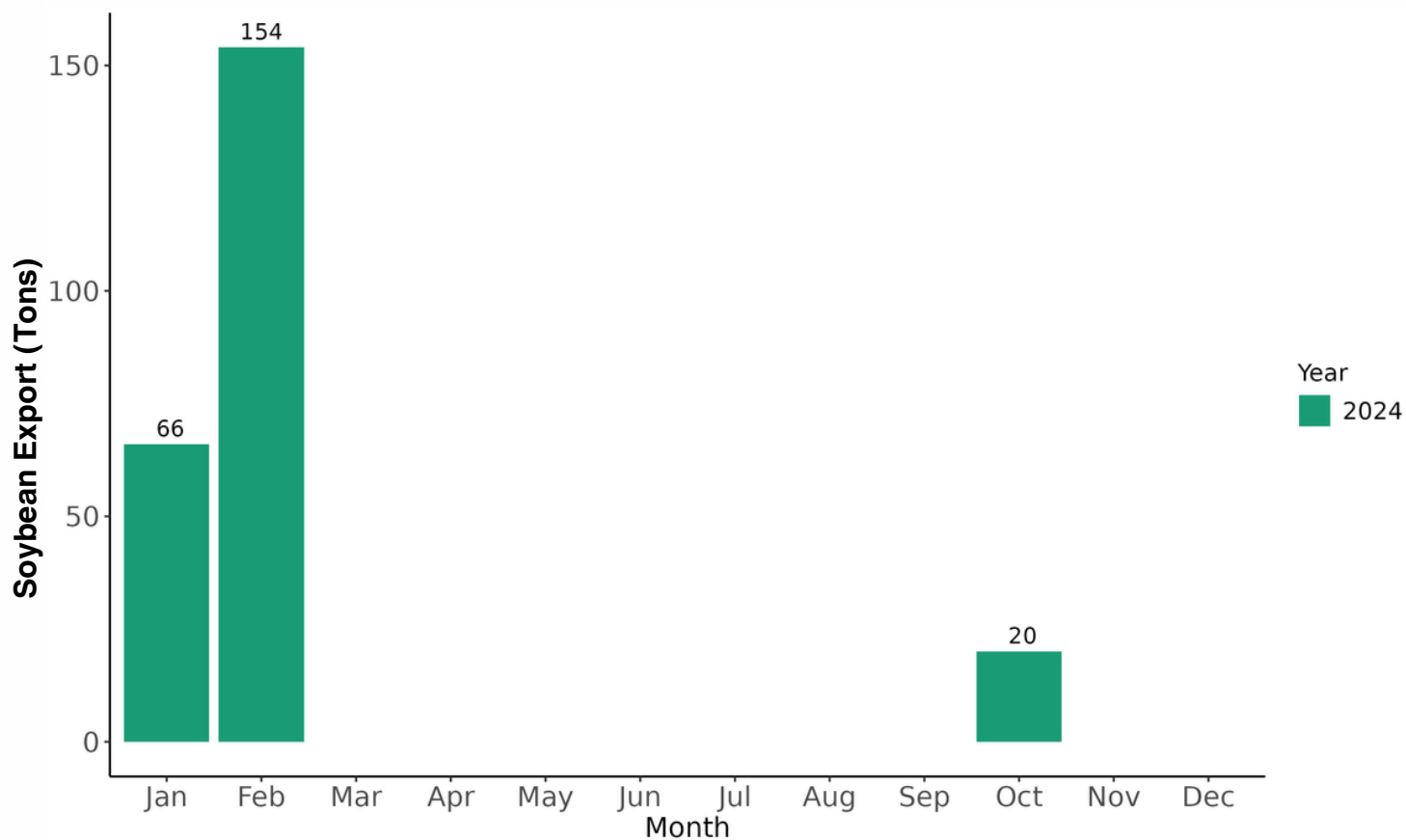


Figure 41: Monthly quantity of soybean export in 2024

For cassava crops in crop year 2024/2025, data on planted area and production are not available. The cassava harvest period started in September 2024 and will continue until March 2025. Regarding cassava trade, imports were reported only in January (72 tons), August (0.01 tons), and September (6 tons) (Figure 42). Cassava exports were reported throughout 2024, with particularly high volumes in April around 7,270 tons, and May around 6,240 tons (Figure 43).

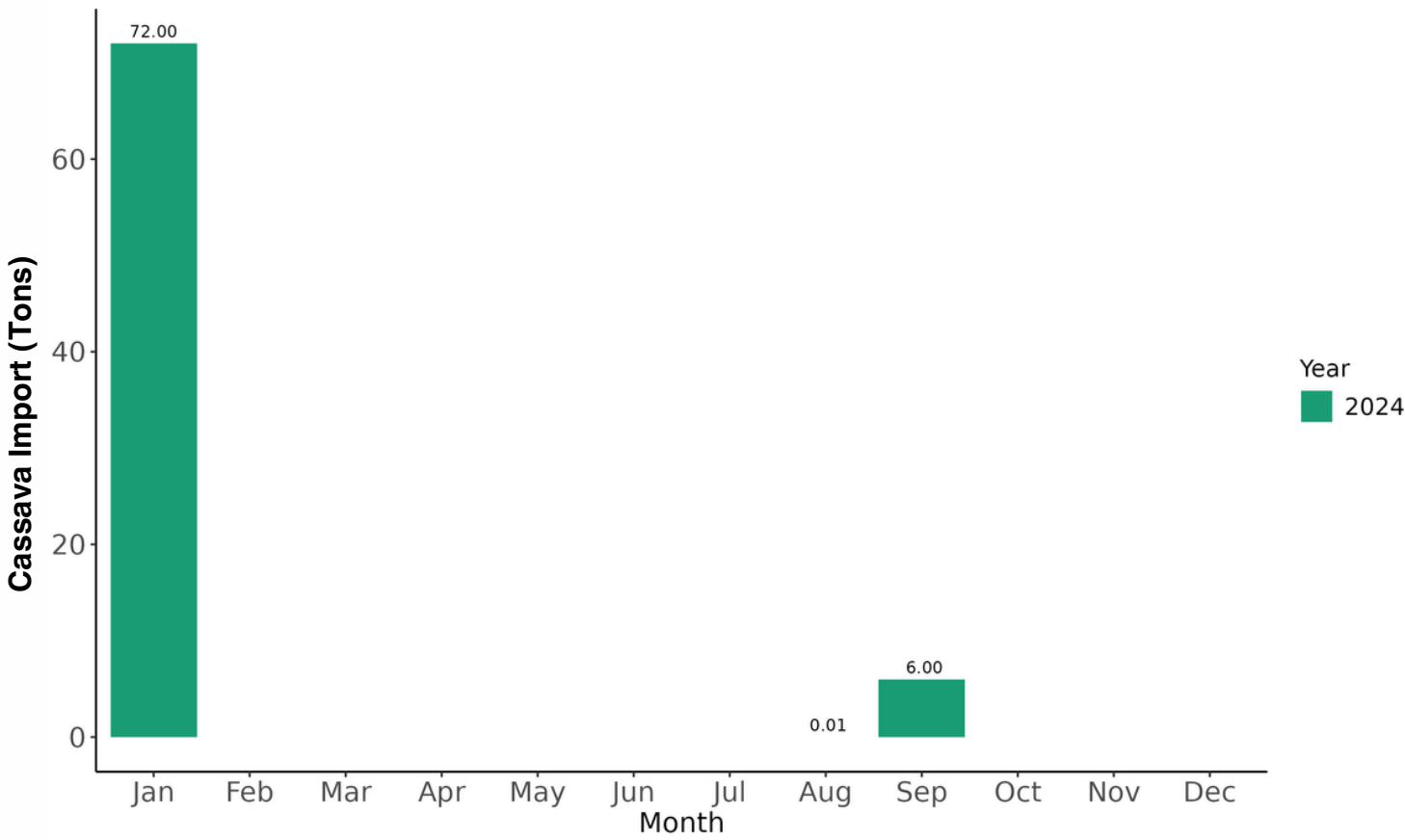


Figure 42: Monthly quantity of cassava import in 2024

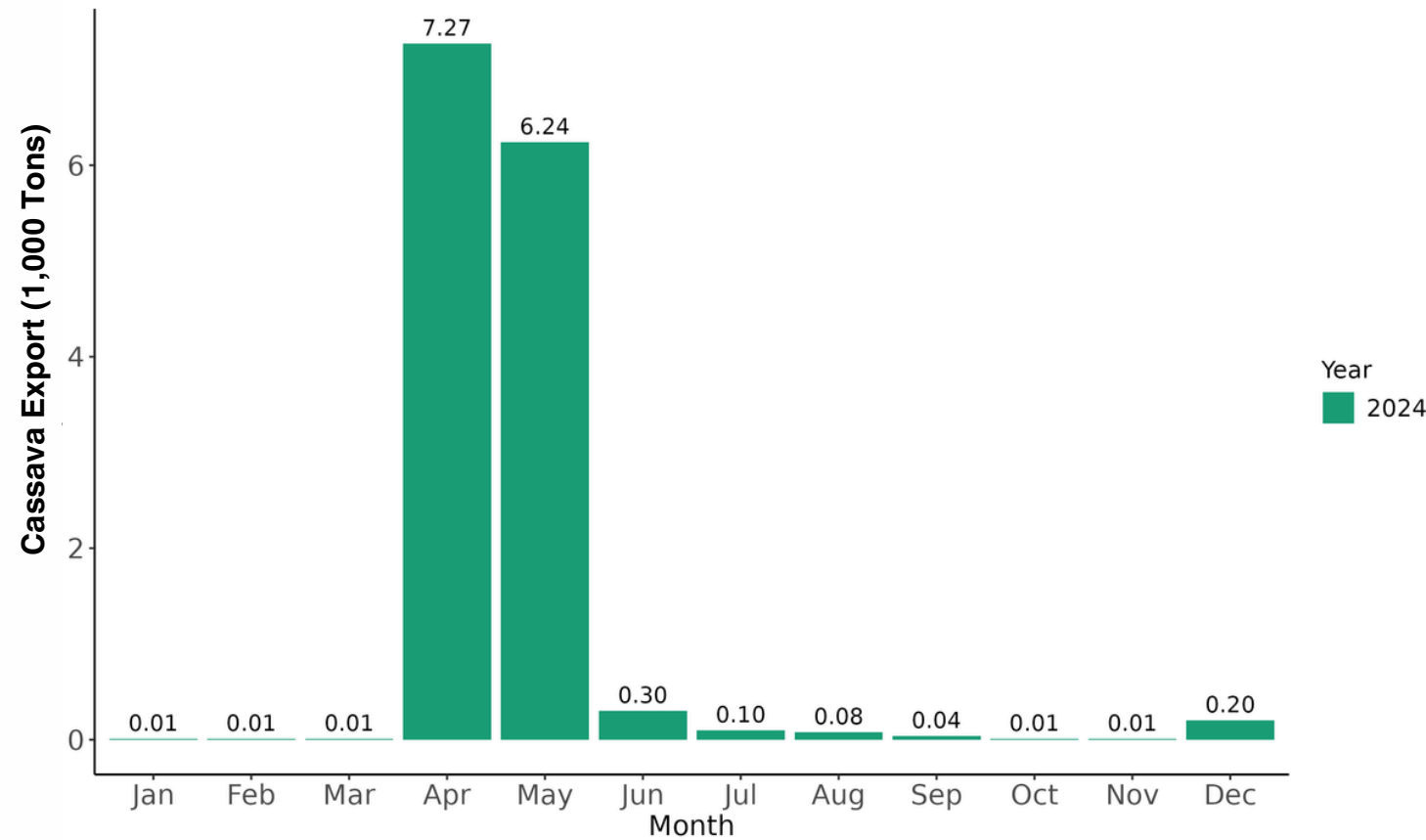


Figure 43: Monthly quantity of cassava export in 2024



Crop Situation of Philippines in Crop Year 2024/2025

Philippines situation in crop year 2024/2025

The information on weather conditions, climate change, global warming, and natural disasters is not yet available. Additionally, crops are affected by weather and natural disasters for the crop year 2024/2025 have not been reported yet.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, data on the planted area is not available. The production is forecasted to decrease due to unfavorable weather conditions. For the rice harvest period, the wet season harvest began from July and ended in December 2024, while the dry season harvest began in January 2025 and will continue through June 2025. Data on rice trade for 2025 is not yet available.

For maize crops in crop year 2024/2025, data on the planted area is not available. The production is forecasted to decrease due to the impact of a dry spell and excessive heat. For the maize harvest period, the wet season harvest started from July and ended in December 2024, while the dry season harvest began in January 2025 and will continue through June 2025. Data on maize trade for 2025 is not yet available.

For soybean crops in crop year 2024/2025, data on the planted area and production are not available. For the soybean harvest period, the wet season harvest started from July and ended to December 2024. Regarding soybean trade, soybean imports in 2024 increased around mid-year, with high import volumes of 17,631 tons in May and 18,623 tons in August. Imports then declined toward the end of 2024 and are expected to decrease further in 2025 (Figure 44). Additionally, soybean export was observed only in December 2024 with amounting of 0.07 tons (Figure 45).

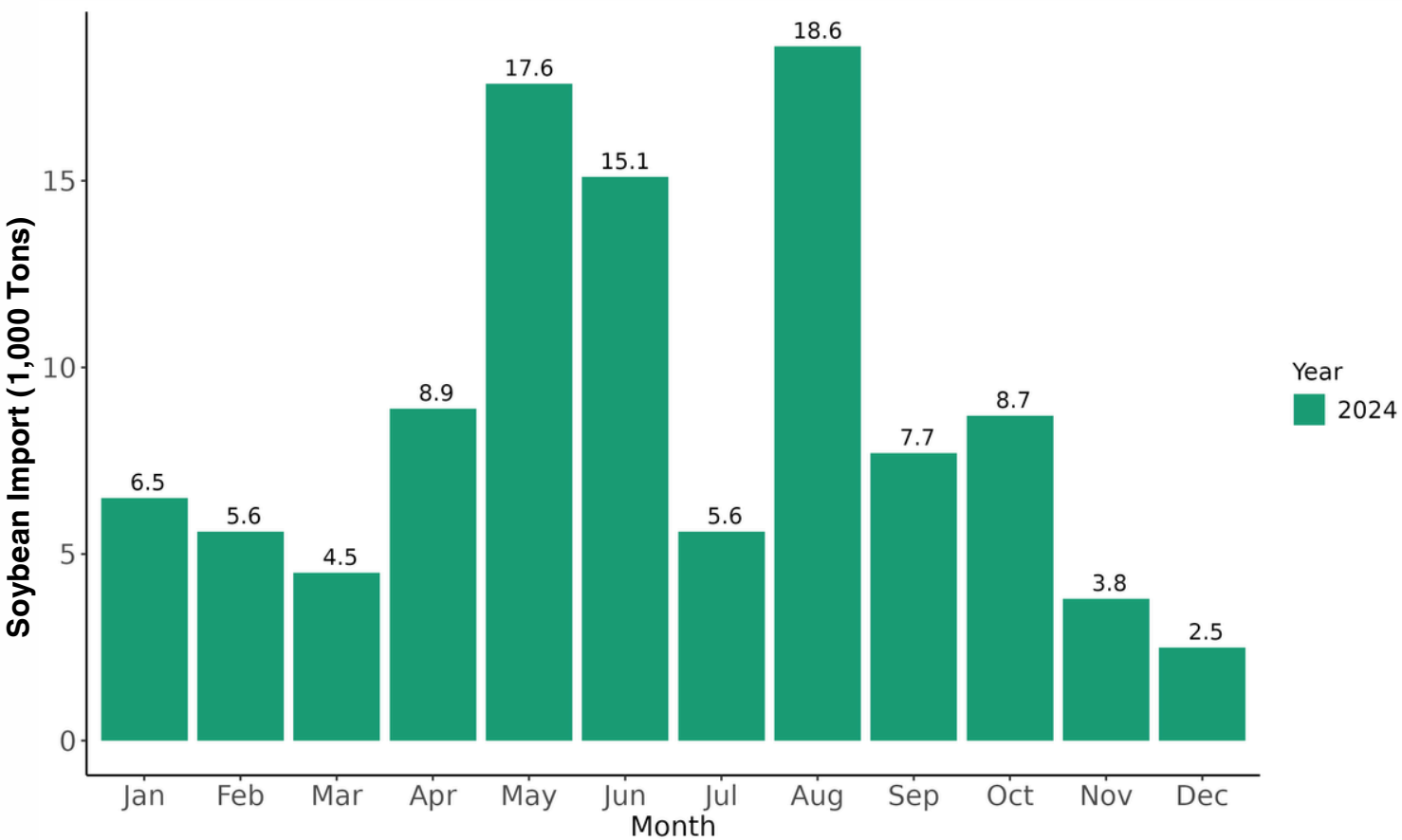


Figure 44: Monthly quantity of soybean import in 2024

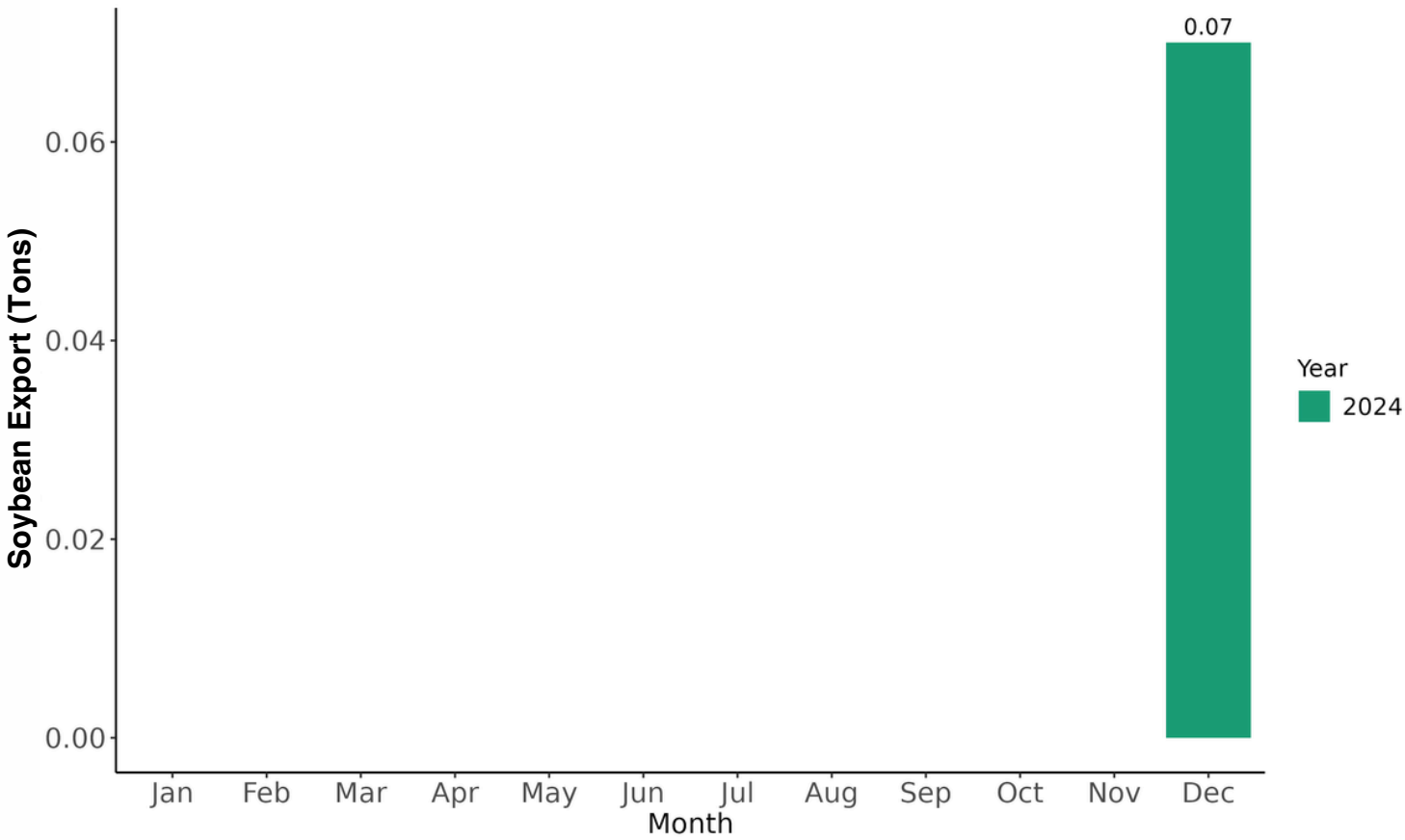


Figure 45: Monthly quantity of soybean export in 2024

For sugarcane crops in crop year 2024/2025, data on the planted area and production are not available. The sugarcane harvest period started in September 2024 and will continue through August 2025. Regarding sugar trade, sugar imports are forecasted to decrease (Figure 46) due to the lack of a sugar order for sugar importation in the crop year 2024/2025. However, the Sugar Regulatory Administration (SRA) issued Sugar Order No. 2, Series of 2024-2025, which allows for the voluntary purchase of locally produced farmers' shares as a prerequisite for future import programs. Additionally, the export of sugar is also forecasted to decrease (Figure 47) because all locally produced sugar will be classified as "B" or for the domestic market.

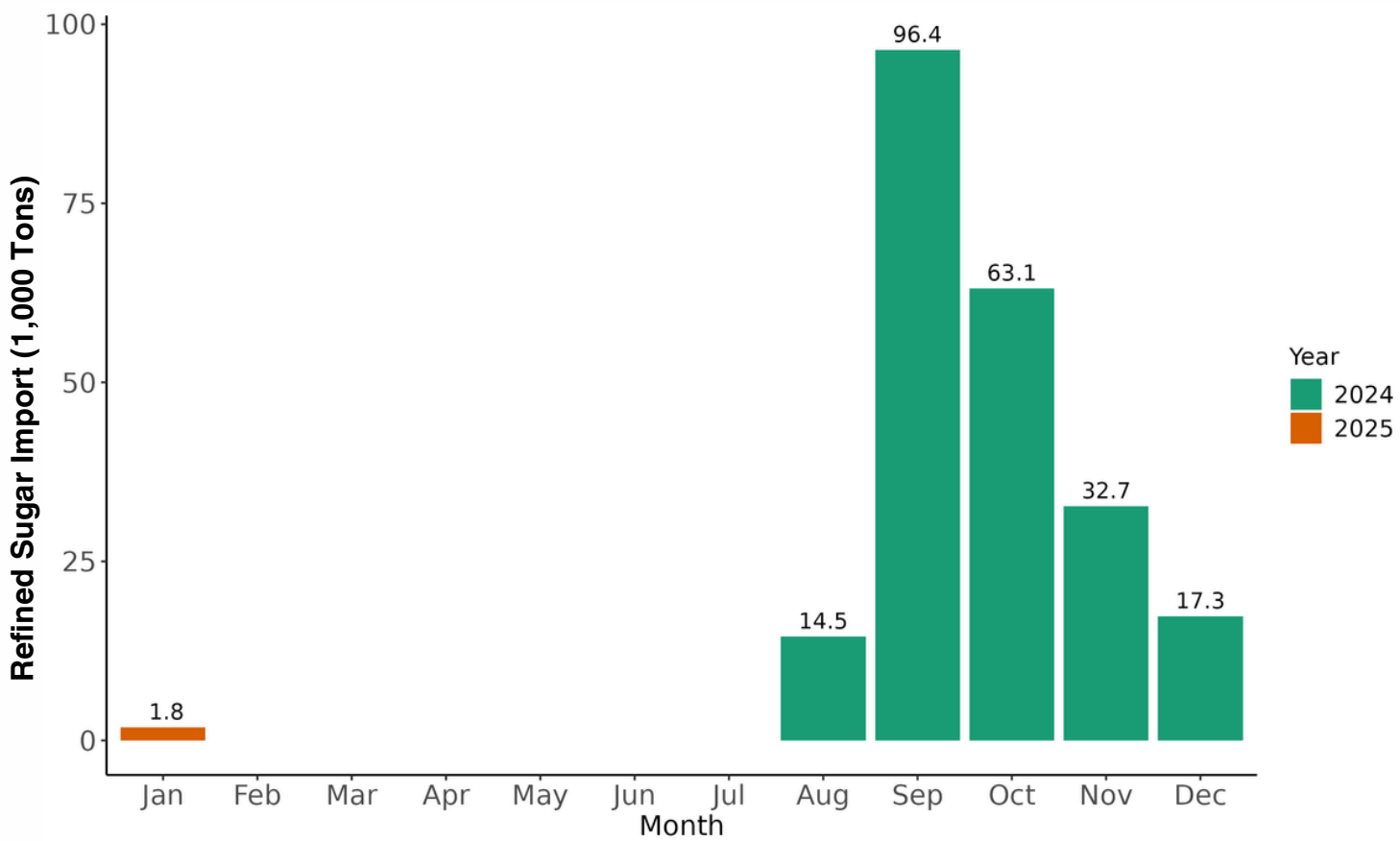


Figure 46: Monthly quantity of refined sugar import in 2024–2025

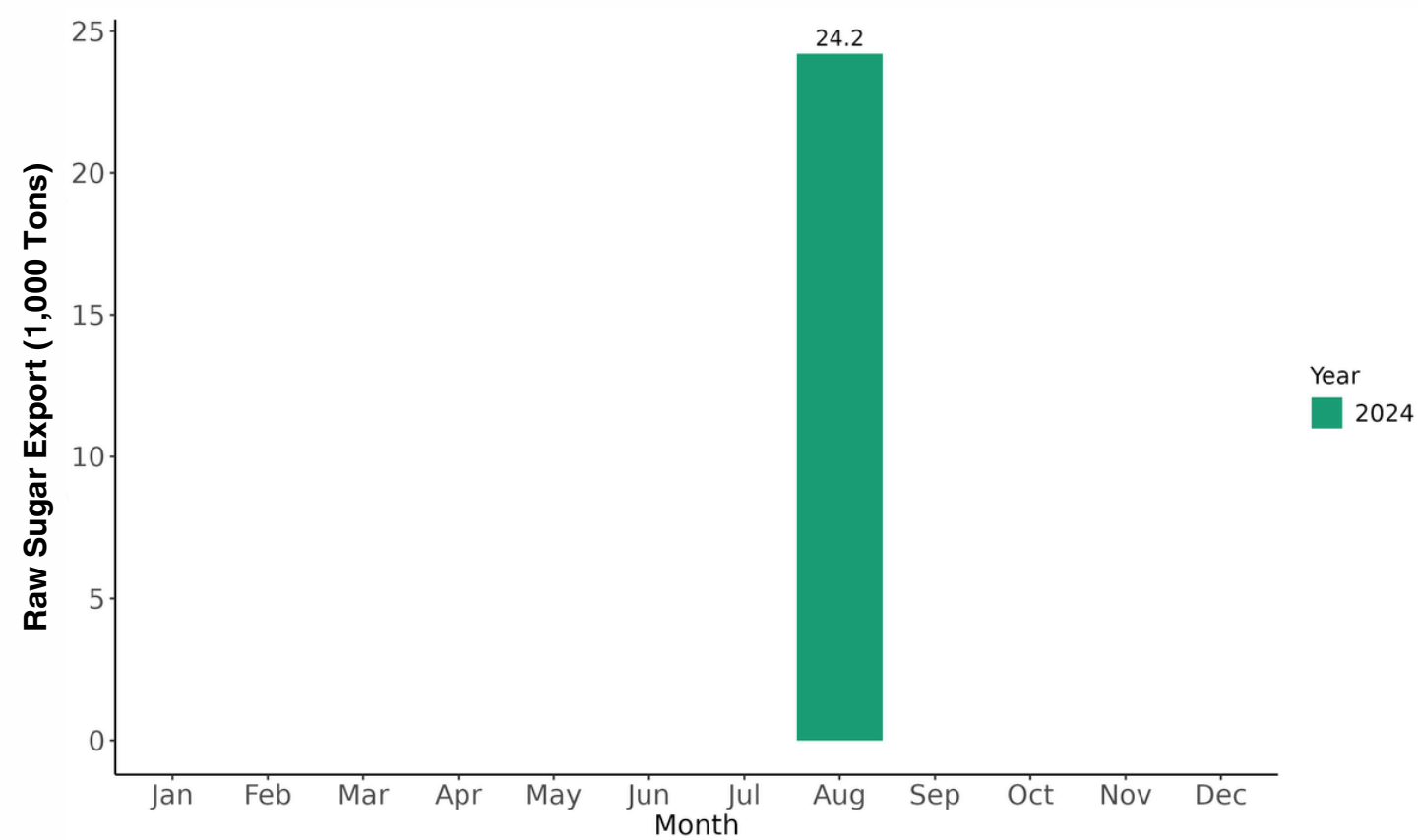


Figure 47: Monthly quantity of raw sugar export in 2024

For cassava crops in crop year 2024/2025, data on the planted area and production are not available. The cassava harvest period started from July and ended in December 2024. Regarding cassava trade, imports in 2024 slowly decreased until September, then significantly increased around 12,755-13,699 tons from October to November (Figure 48). The export of cassava in 2024 was somewhat irregular throughout the year, but the export value in 2025 is forecasted to remain similar to 2024, with an expected export range of 139-261 tons in 2025 (Figure 49).

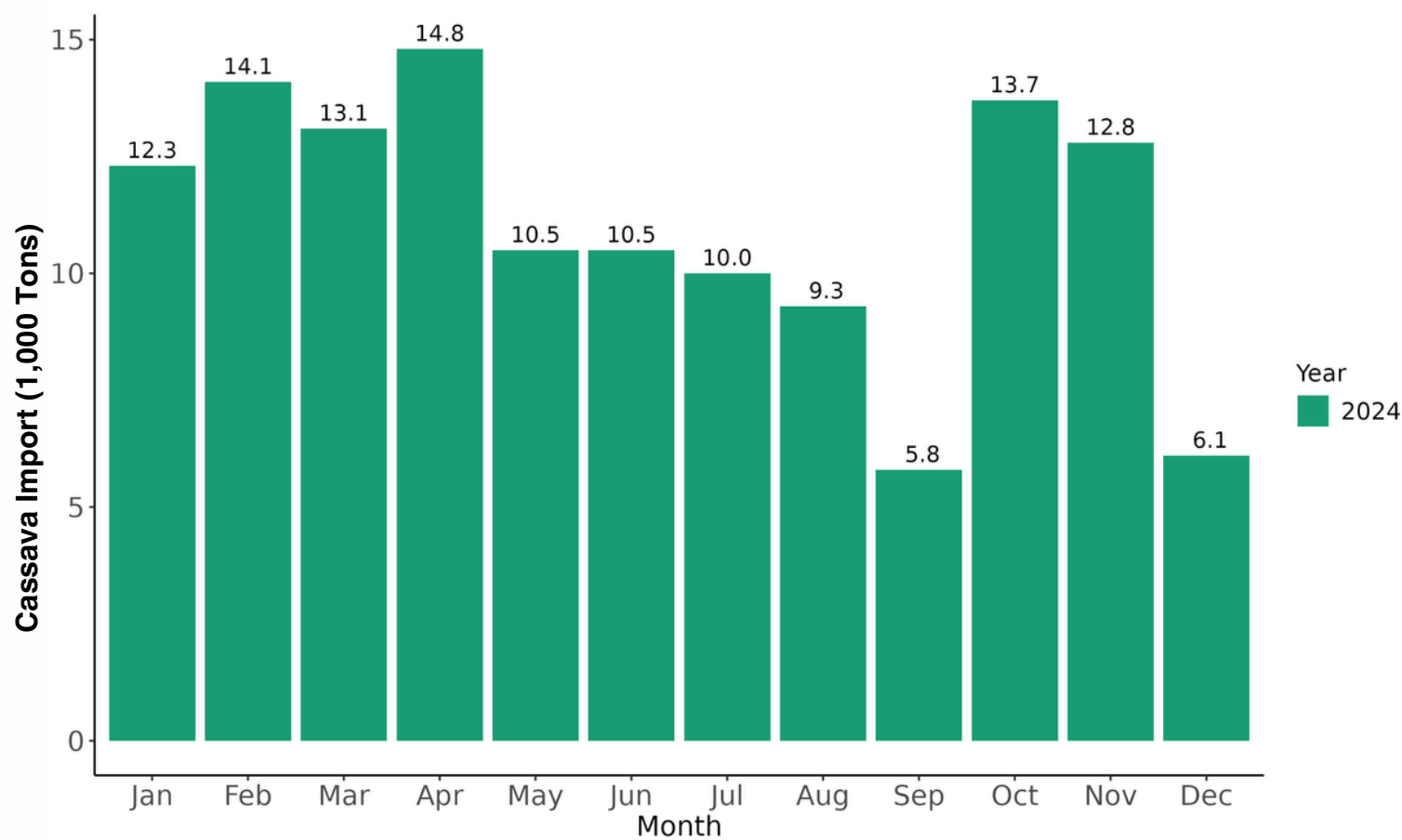


Figure 48: Monthly quantity of cassava import in 2024

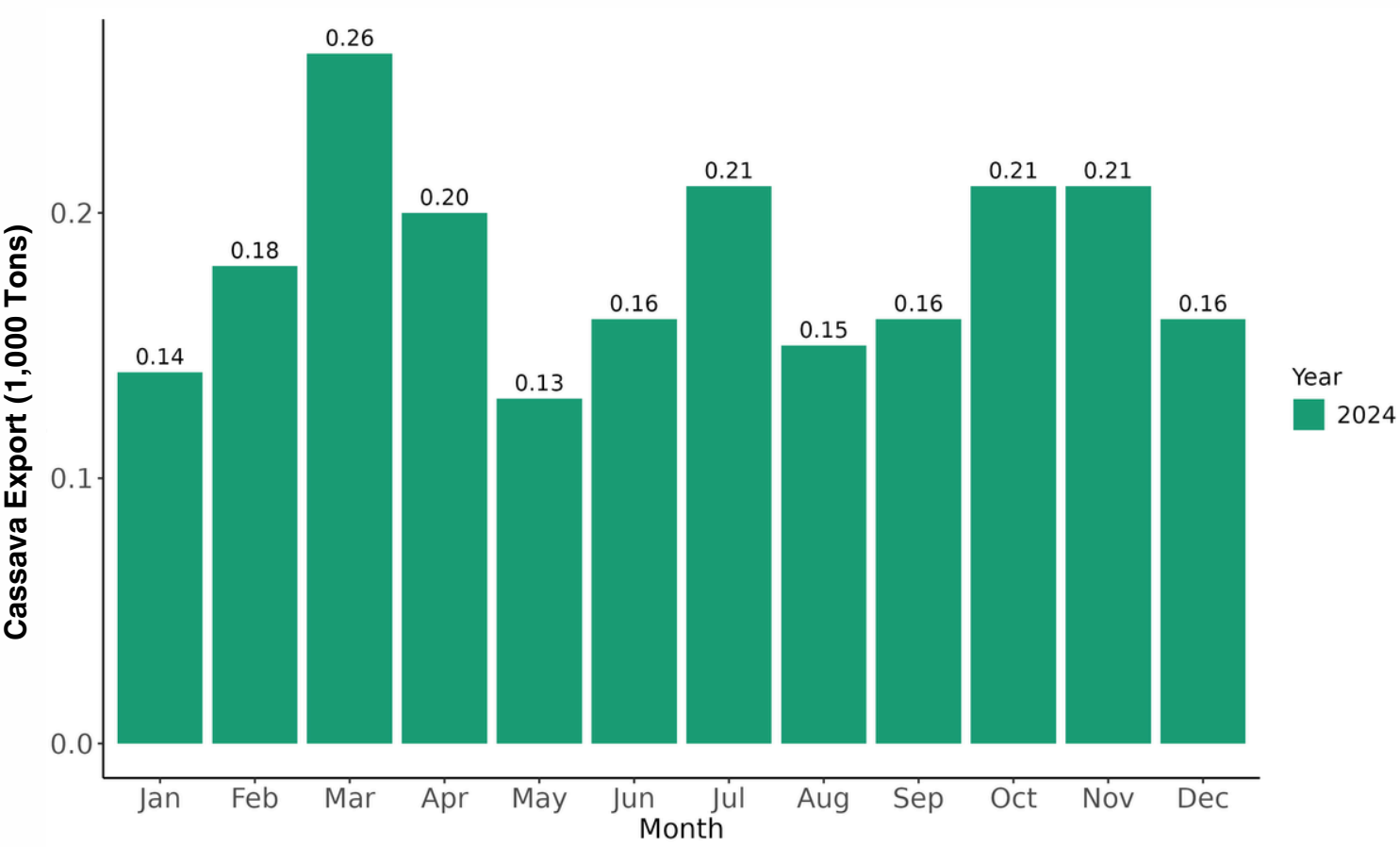


Figure 49: Monthly quantity of cassava export in 2024

Crop Situation of Thailand in Crop Year 2024/2025



Thailand situation in crop year 2024/2025

Thailand is forecasted to experience favorable weather conditions in crop year 2024/2025 with sufficient water availability due to appropriate rainfall. Thailand may face the impacts of climate change and global warming, including extreme drought conditions (El Niño) alternating with heavy rainfall (La Niña) throughout the year.

Damaged areas have been reported for five commodities, including 300,000 hectares of rice crops, with approximately 80% of the damage attributed to climate change or global warming; 4,800 hectares of maize crops, with approximately 80% of the damage caused by climate change or global warming; no recorded damage for sugarcane crops, and 100,000 hectares of cassava crops, with approximately 70% of the damage caused by climate change or global warming.

Additionally, in crop year 2024/2025, several natural disasters have been recorded, including floods in the northern, northeastern, and central regions, droughts affecting the entire country, and the spread of diseases, particularly Cassava Mosaic Disease in the northeastern region.

Despite these challenges, the impact of climate change has prompted farmers and the government to collaborate in order to protect and manage crops. Farmers have adapted by adjusting their cultivation plans and planting schedules to better align with changing weather patterns. The government has also implemented various policies to mitigate risks and damage, including managing water supplies for farmers and planning to preserve water resources to support crops that require less water.

The situations of five main crops are as follows:

For rice crops in crop year 2024/2025, the planted area is forecasted to decrease in due to rising prices of competing crops and delayed rainfall, similar to last year. However, rice production is expected to increase due to favorable weather conditions, as rainfall during the 2024 rainy season (May-October) was above average, combined with farmers' efforts in managing their crops. For the rice harvest period, the wet season has begun from August 2024 through to April 2025, and the dry season will begin from February 2025 to October 2025. Regarding rice trade, rice imports are predicted to increase compared to 2024 (Figure 50). However, exports are expected to decrease gradually (Figure 51), influenced by competition from India, whose government has agreed to export white rice without export taxes excepting Basmati rice, affecting other importing countries and slowing imports as they plan new market practices based on supply and demand dynamics.

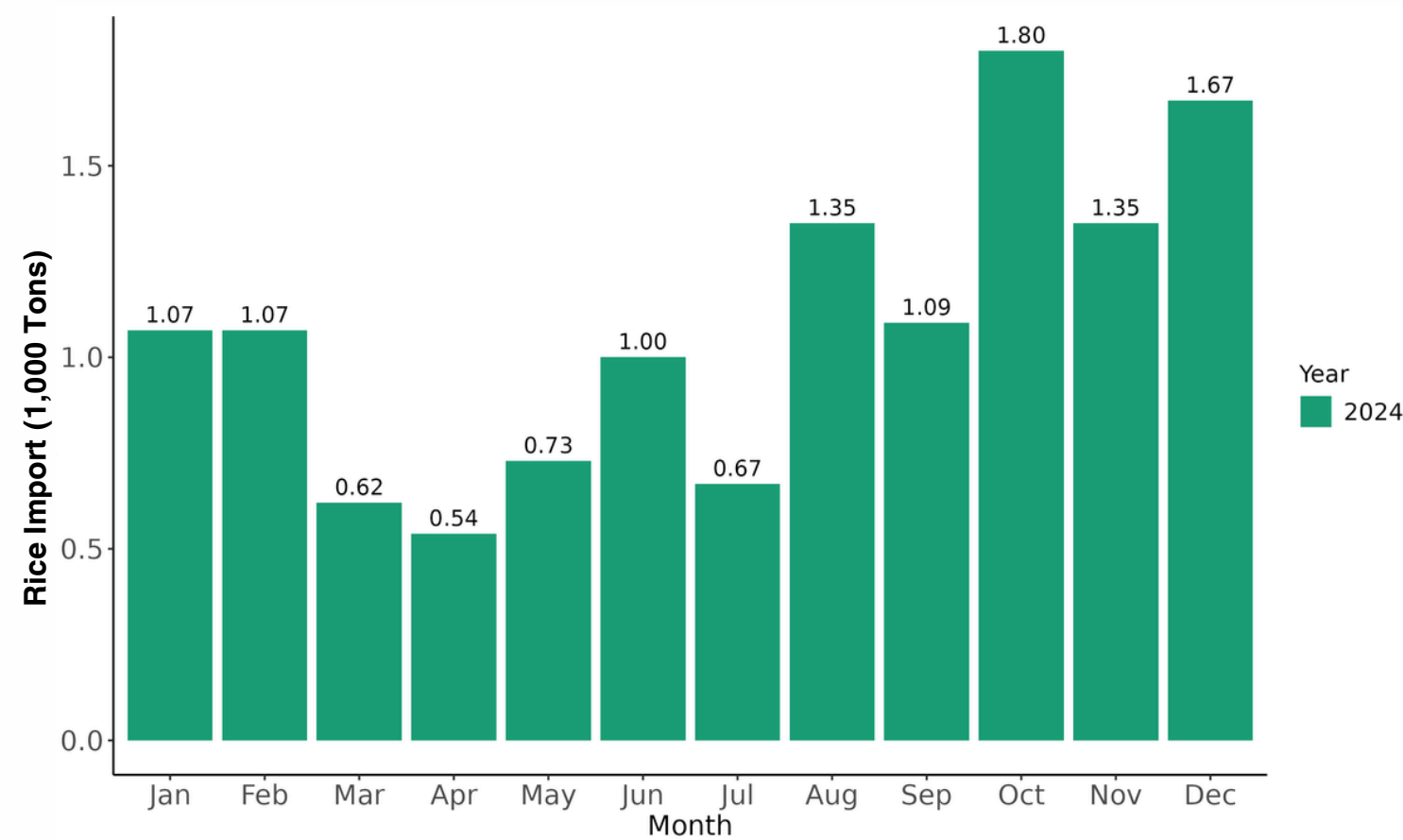


Figure 50: Monthly quantity of rice import in 2024

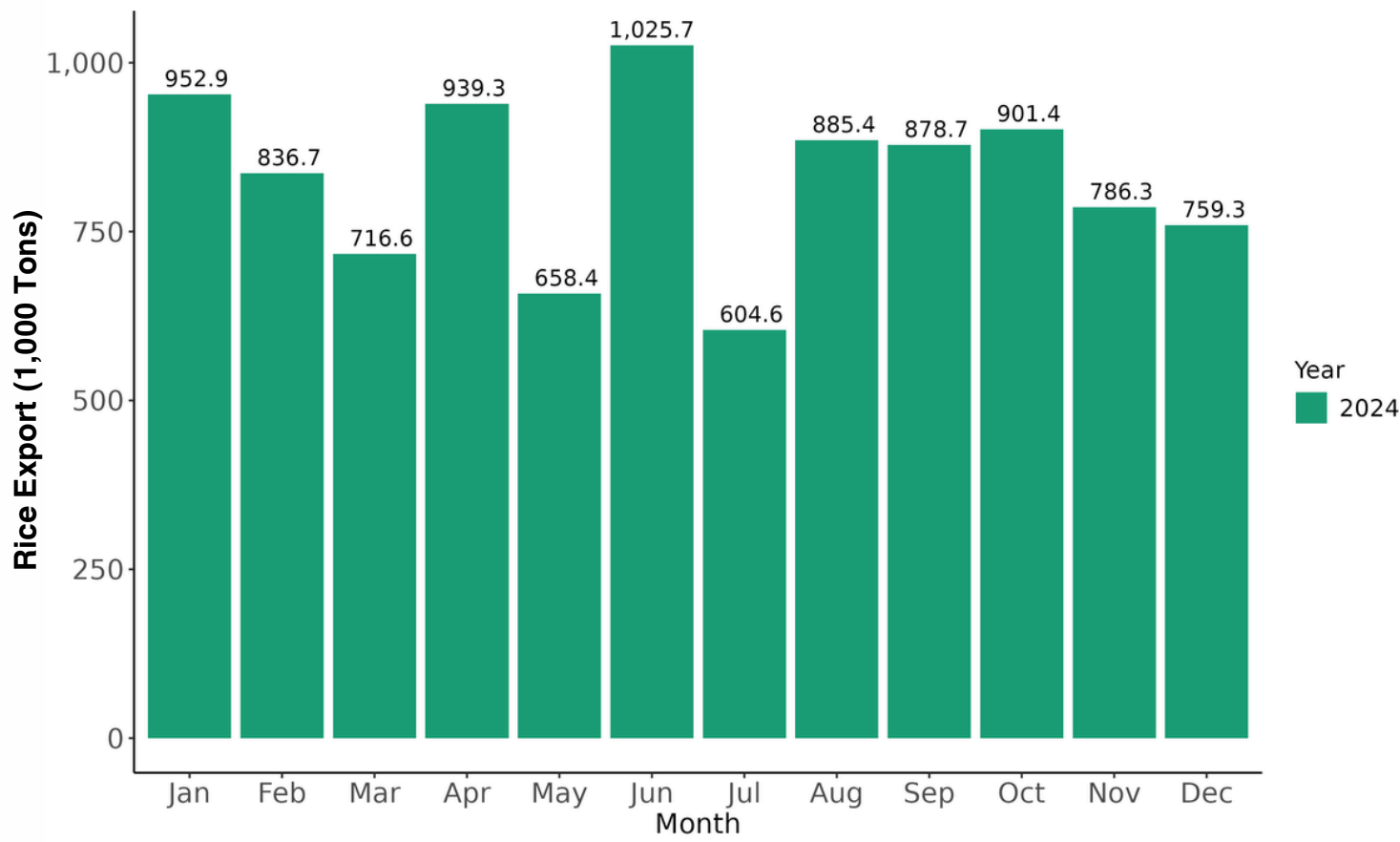


Figure 51: Monthly quantity of rice export in 2024

For maize crops in crop year 2024/2025, the planted area is forecasted to increase due to farmers responding to rising maize prices, favorable weather conditions, and anticipated lower chemical costs. The maize production is also forecasted to increase, which driven by favorable weather conditions. For the maize harvest period, the wet season started from June 2024 and ended in January 2025, while the dry season begins from February 2025 to May 2025. Regarding maize trade, maize imports are expected to decrease compared to 2024 (Figure 52), influenced by government policies aimed at preventing agricultural burning to combat PM 2.5 pollution (A Particulate Matter 2.5 micrometers or smaller in diameter). The government is collaborating with entrepreneurs to ensure that maize production from burning-affected areas is not purchased. As a result, maize imports from neighboring countries may decrease according to government policies. Maize exports are expected to increase (Figure 53), driven by domestic demand for animal feed, which supports growth in the livestock industry.

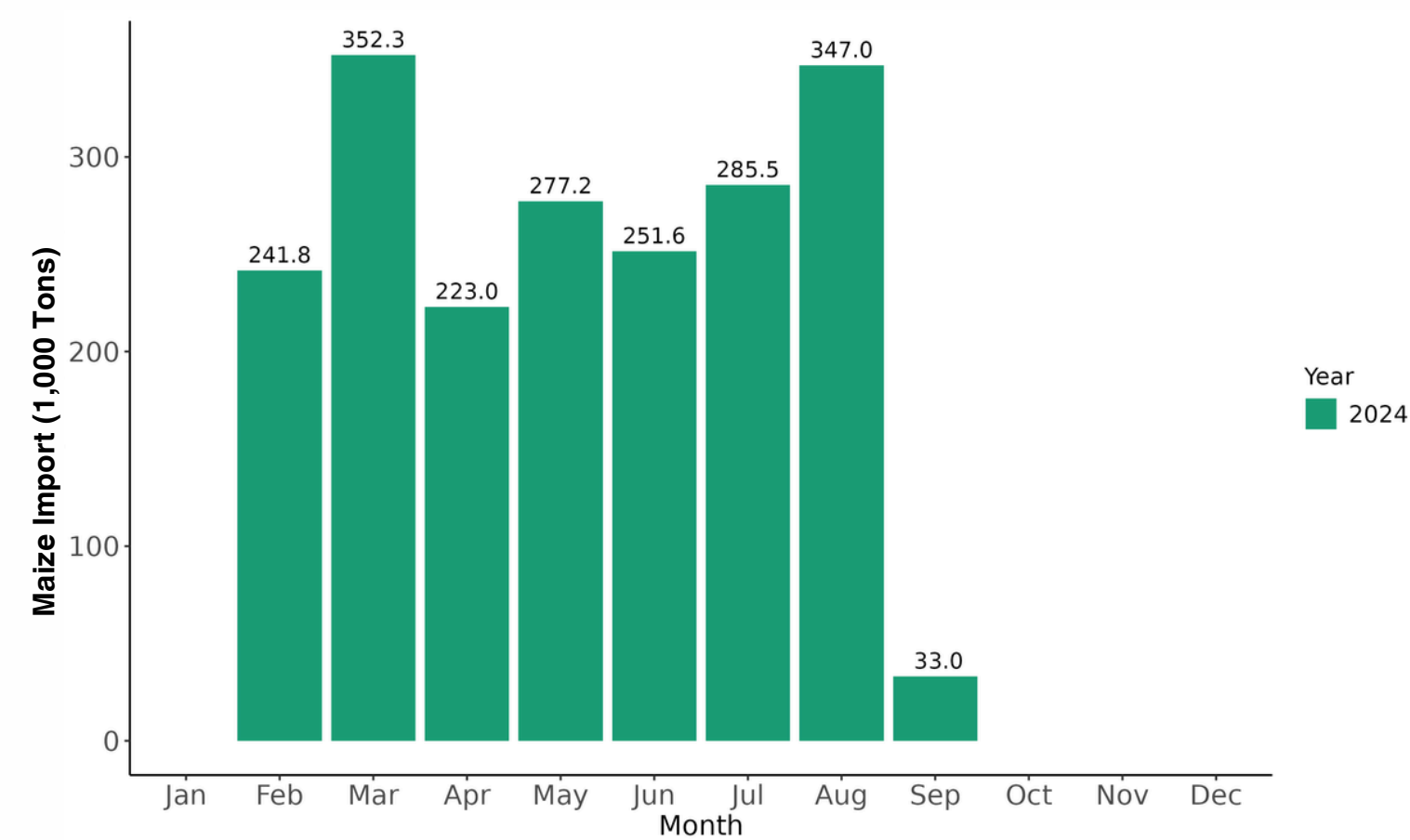


Figure 52: Monthly quantity of maize import in 2024

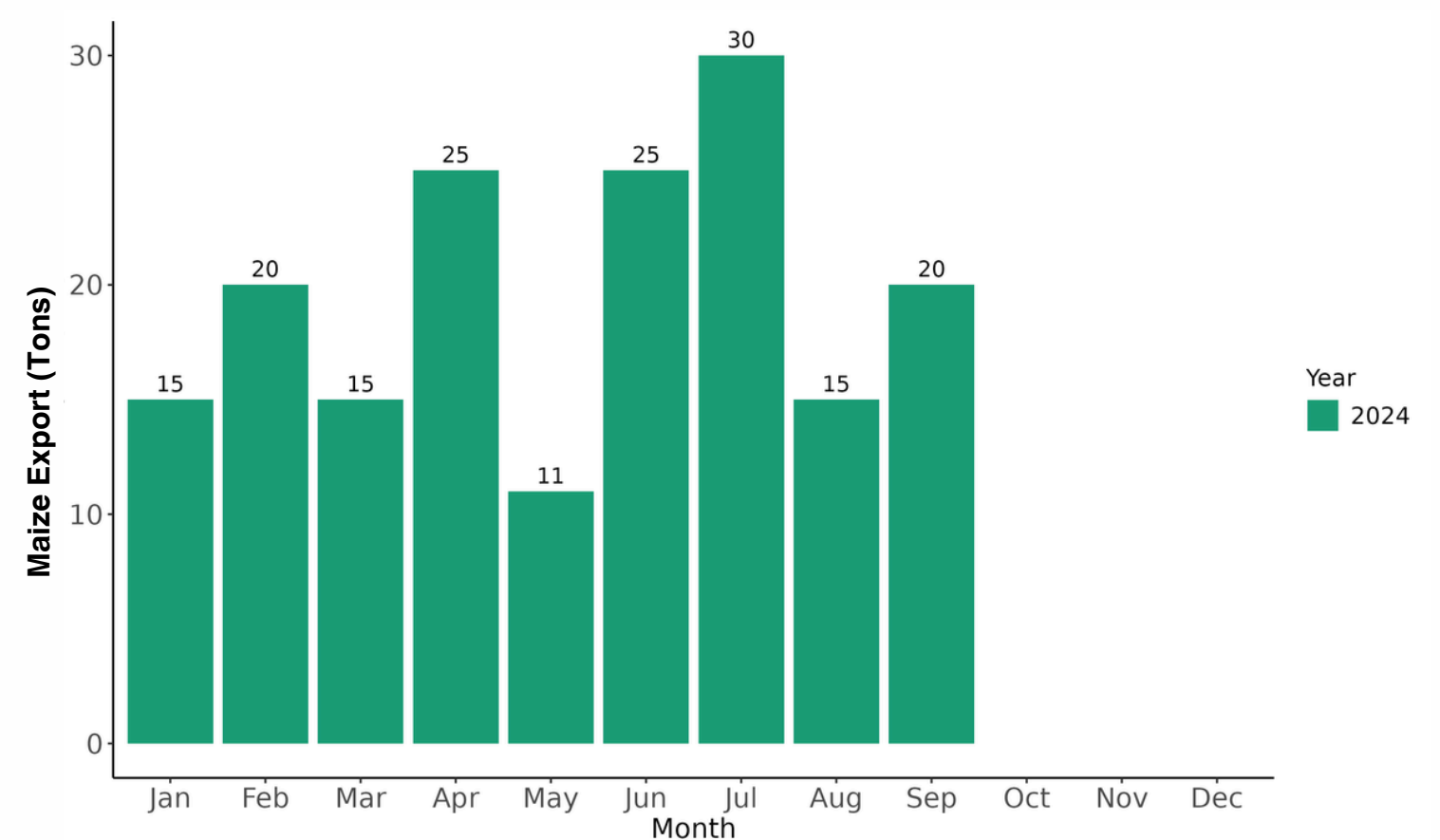


Figure 53: Monthly quantity of maize export in 2024

For sugarcane crops in crop year 2024/2025, the planted area is forecasted to increase due to rising sugarcane prices and favorable weather conditions, particularly increased rainfall in July and September 2024, especially in the upper northern and northeastern regions. Production is expected to increase due to favorable weather conditions, improved crop management, and increased fertilizer application. The sugarcane harvest period has begun from December 2024 to April 2025. Regarding sugar trade, sugar imports are forecasted to decrease, as the government has implemented consumer protection measures to safeguard the domestic sugar industry, ensuring sufficient sugar supply for both domestic use and export. This follows a trend of increasing imports in 2024 (Figure 54). Sugar exports are expected to increase, supported by increased sugar production and government incentives for farmers to use fresh sugarcane to maximize sugar yield, despite a reduction in exports throughout 2024 (Figure 55).

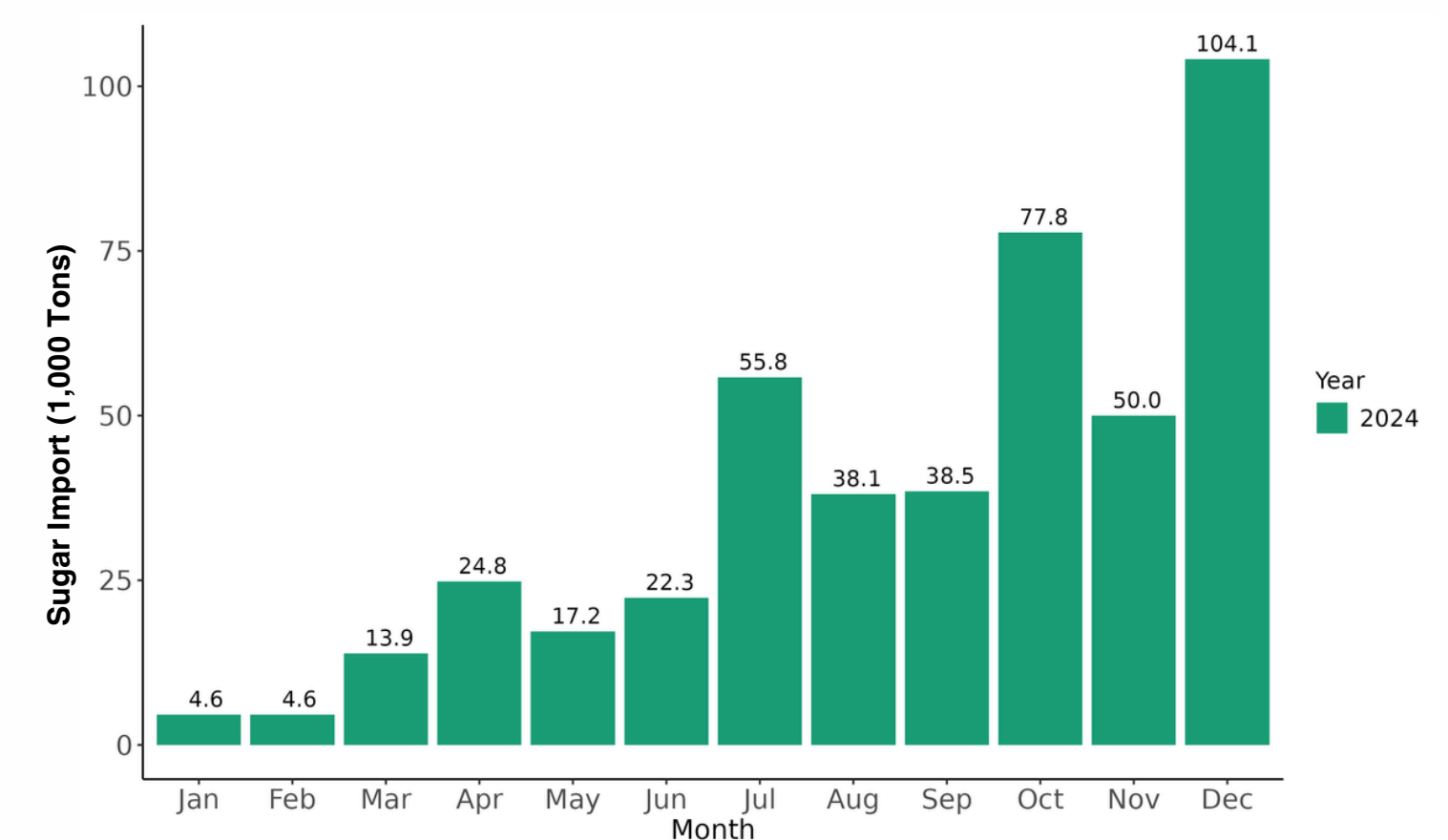


Figure 54: Monthly quantity of sugar import in 2024

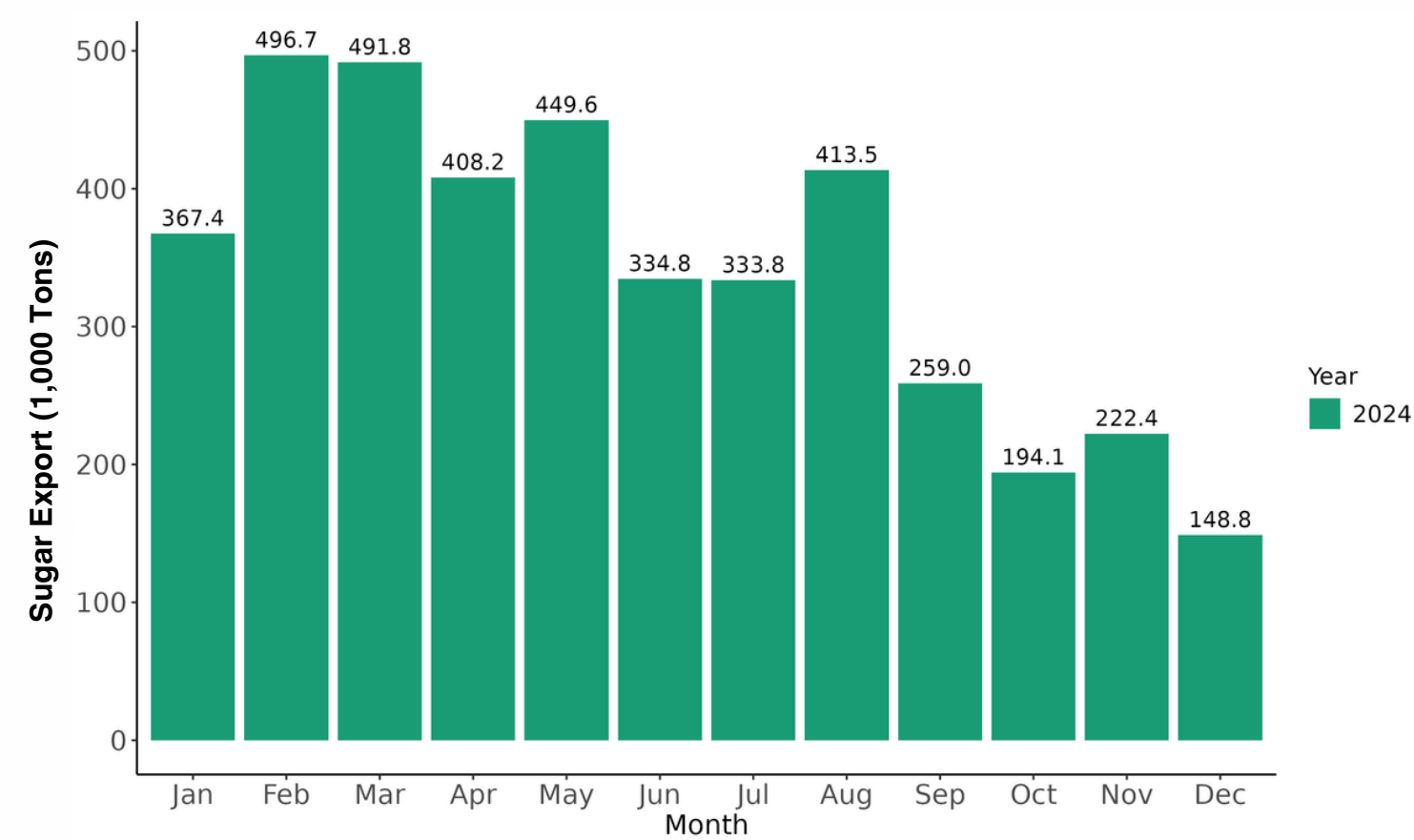


Figure 55: Monthly quantity of sugar export in 2024

For soybean crops in crop year 2024/2025, the planted area is forecasted to decrease due to farmers altering for more profitable crops, as well as the intensive management of soybean farming and low yields. There is also a lack of labor for harvesting and insufficient seed stocks, coupled with high production costs (e.g., harvesting, seeds, and pesticides). These factors may discourage farmers from expanding their soybean areas, leading them to plant other crops such as rice, maize, sugarcane, green beans, and sweet corn, or leave areas fallow. However, production is expected to increase due to favorable weather conditions and better crop management. The soybean harvest period will begin in August and continue through December 2025, with the dry season spanning from January to May 2025. Regarding soybean trade, soybean imports are expected to increase compared to 2024 (Figure 56), driven by rising demand, as domestic production is insufficient. Soybean exports are predicted to decrease compared to 2024, though exports may see an uptick in the first quarter of 2025 compared to the last quarter of 2024 (Figure 57).

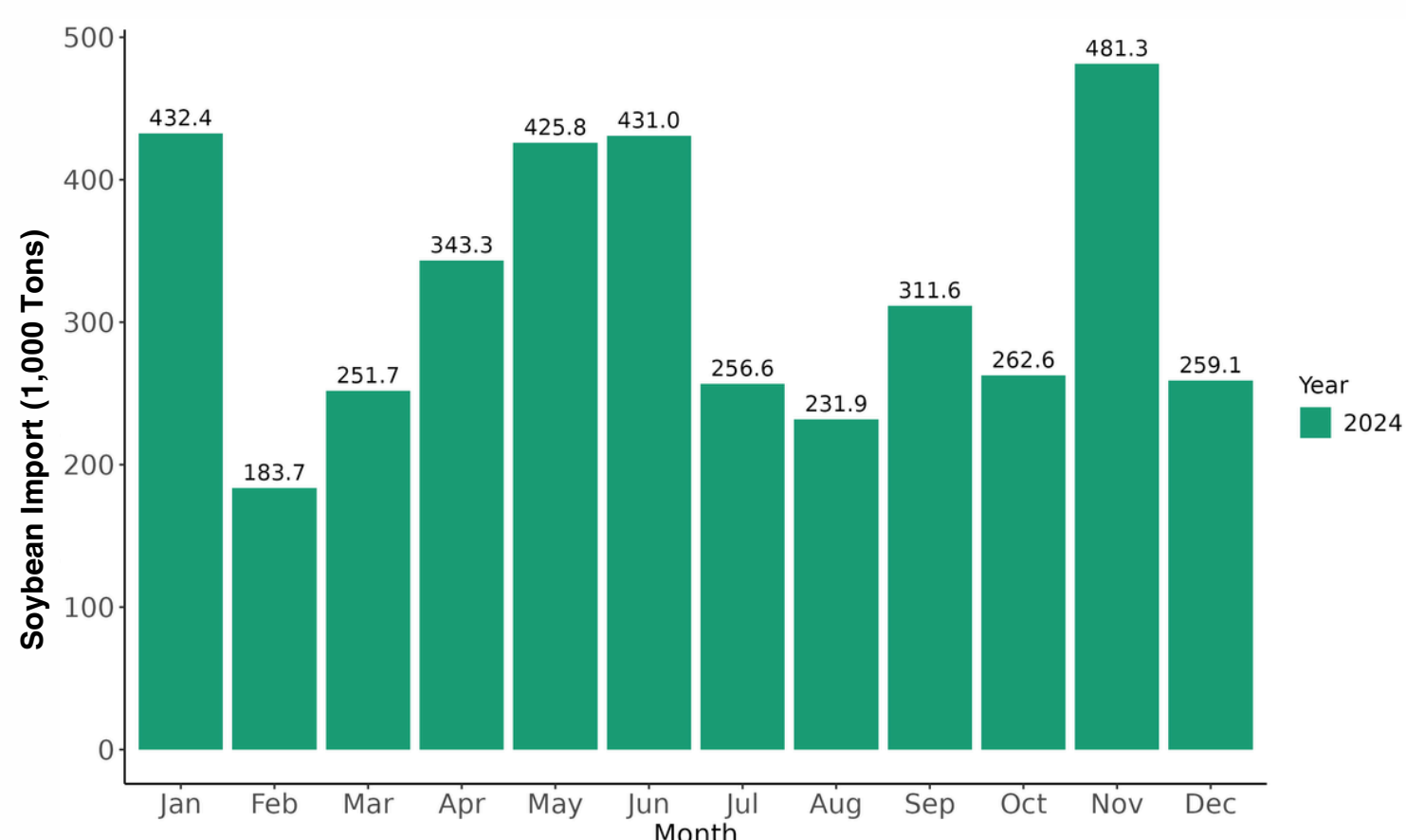


Figure 56: Monthly quantity of soybean import in 2024

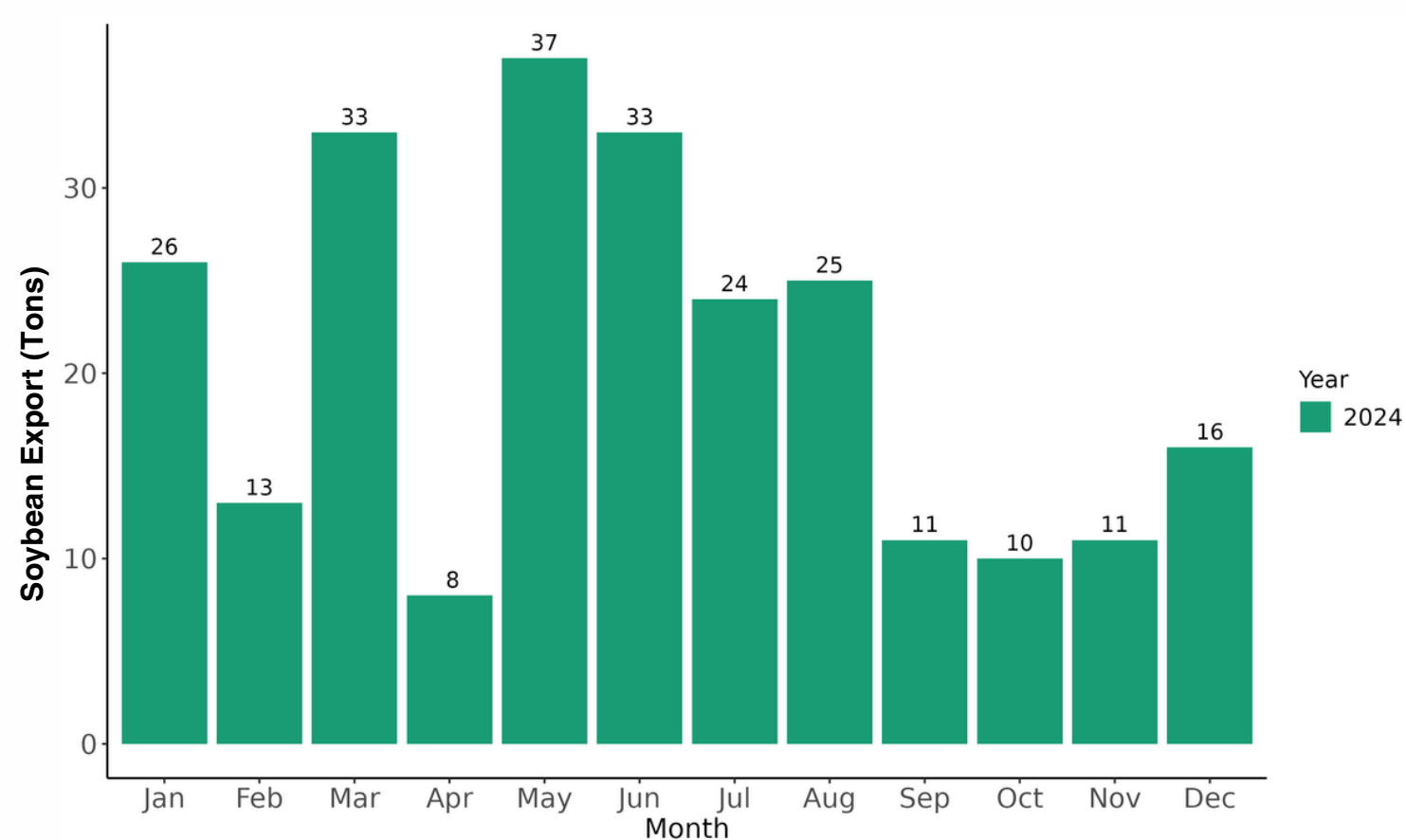


Figure 57: Monthly quantity of soybean export in 2024

For cassava crops in crop year 2024/2025, the planted area is forecasted to increase as farmers respond to rising cassava prices. Farmers also switch from maize and sugarcane crops to cassava crops, which maize and sugarcane production are more costly to grow. However, the cassava production is forecasted to decrease due to potential rainfall variations that may negatively affect cassava tuber quality. The increased planting area may help offset some of this decline in yield, though pests and diseases could further impact production such as Cassava Mosaic Disease. The cassava harvest period has started from October 2024 to September 2025. Regarding cassava trade, cassava imports are expected to increase compared to 2024 (Figure 58), as domestic production will not meet demand from exporters and entrepreneurs. Cassava exports are forecasted to decrease (Figure 59) due to reduced demand from China, the major importer of cassava, which is now using maize as a substitute for cassava products in alcohol production. Additionally, the growing cassava industry in Lao PDR may affect Thailand's cassava flour exports.

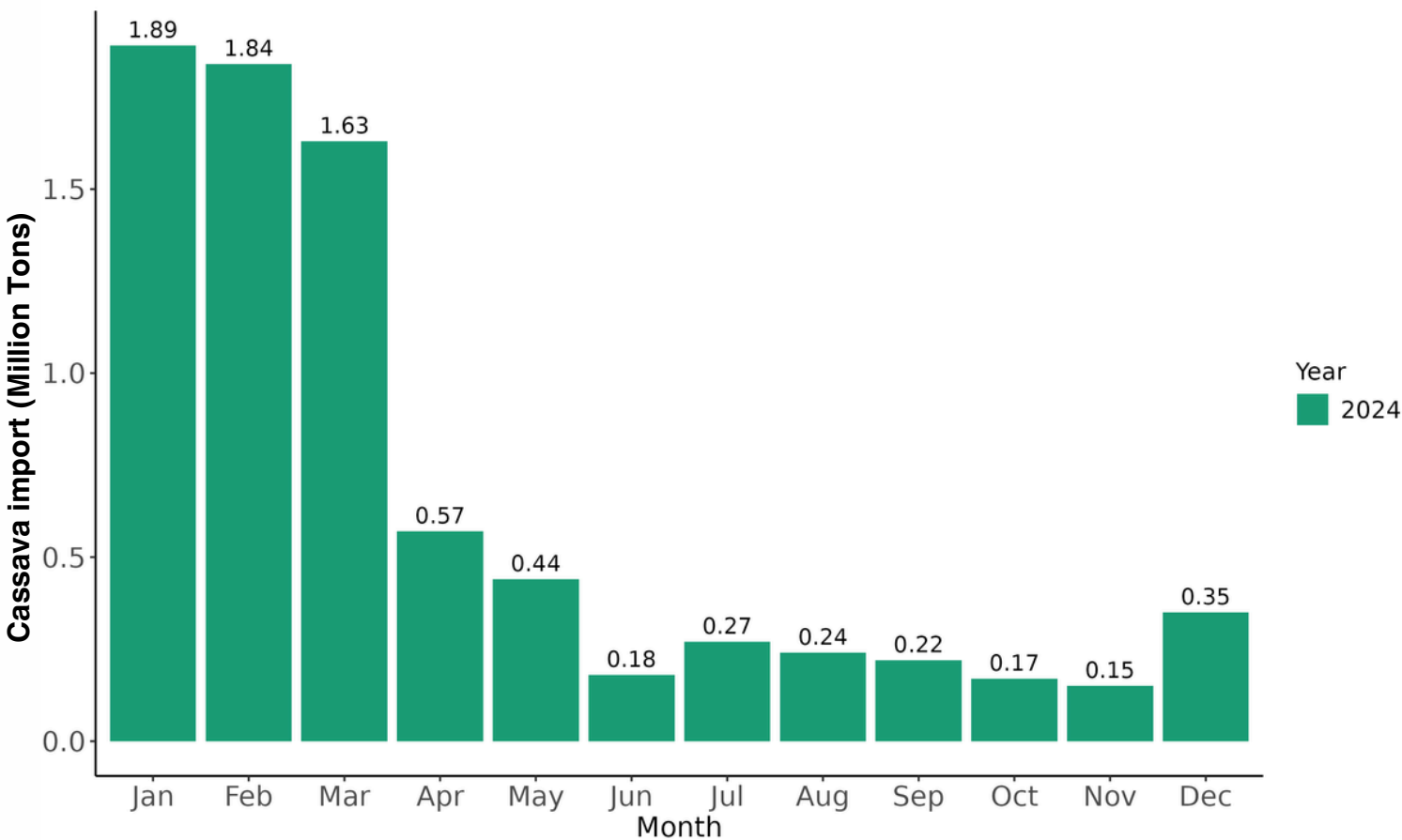


Figure 58: Monthly quantity of cassava import in 2024

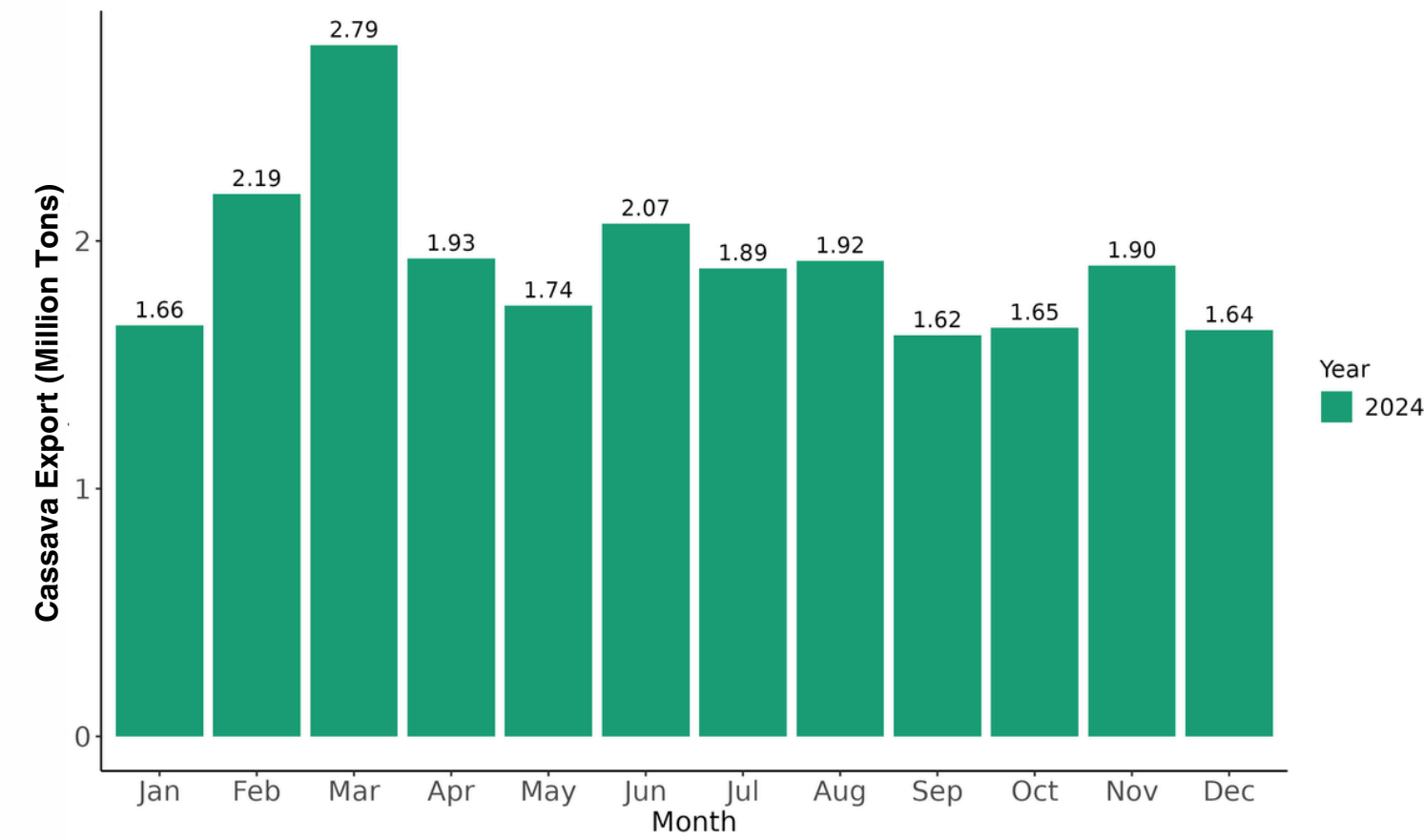


Figure 59: Monthly quantity of cassava export in 2024

Crop Situation of Vietnam in Crop Year 2024/2025

Weather Conditions and Climate Change Impact

In the first three months of 2025, the weather is expected to be relatively favorable for agricultural production in Vietnam.

Trade of Vietnam’s Agricultural Commodities in 2025

Trade of Vietnam in 2024, the export value of Vietnam’s agriculture, forestry, and fisheries sector is estimated to have increased by 18.8% compared to the previous year, driven by higher exports of various commodities, including rice, sugarcane, and maize. However, cassava is one of the few commodities that saw a decrease in export value in 2024.

The main consuming markets for Vietnamese agricultural products include the United States, China, Japan, Philippines, and South Korea. Malaysia, Indonesia, and Thailand rank 8th, 9th, and 10th among the largest export markets for Vietnam’s agriculture, forestry, and fisheries sector, respectively.

Rice in Vietnam in 2025, Vietnam's dry rice production in 2025 is forecasted to be higher than in 2024 due to favorable weather conditions. However, regarding rice trade, rice prices in both domestic and international markets have continuously decreased in the first two months of 2025, which may affect Vietnam's total rice exports in 2025 (Figures 60–61).

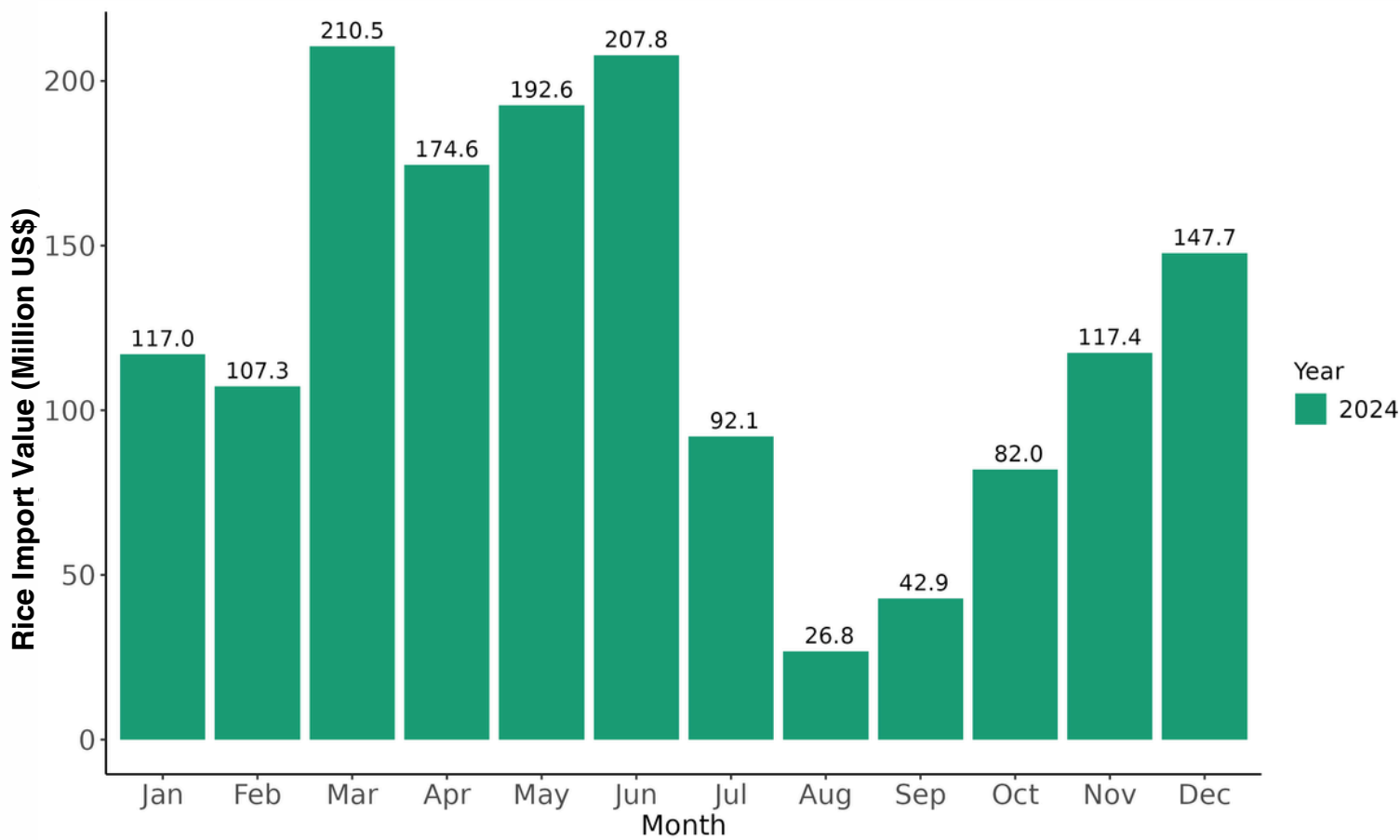


Figure 60: Monthly import value of rice in 2024

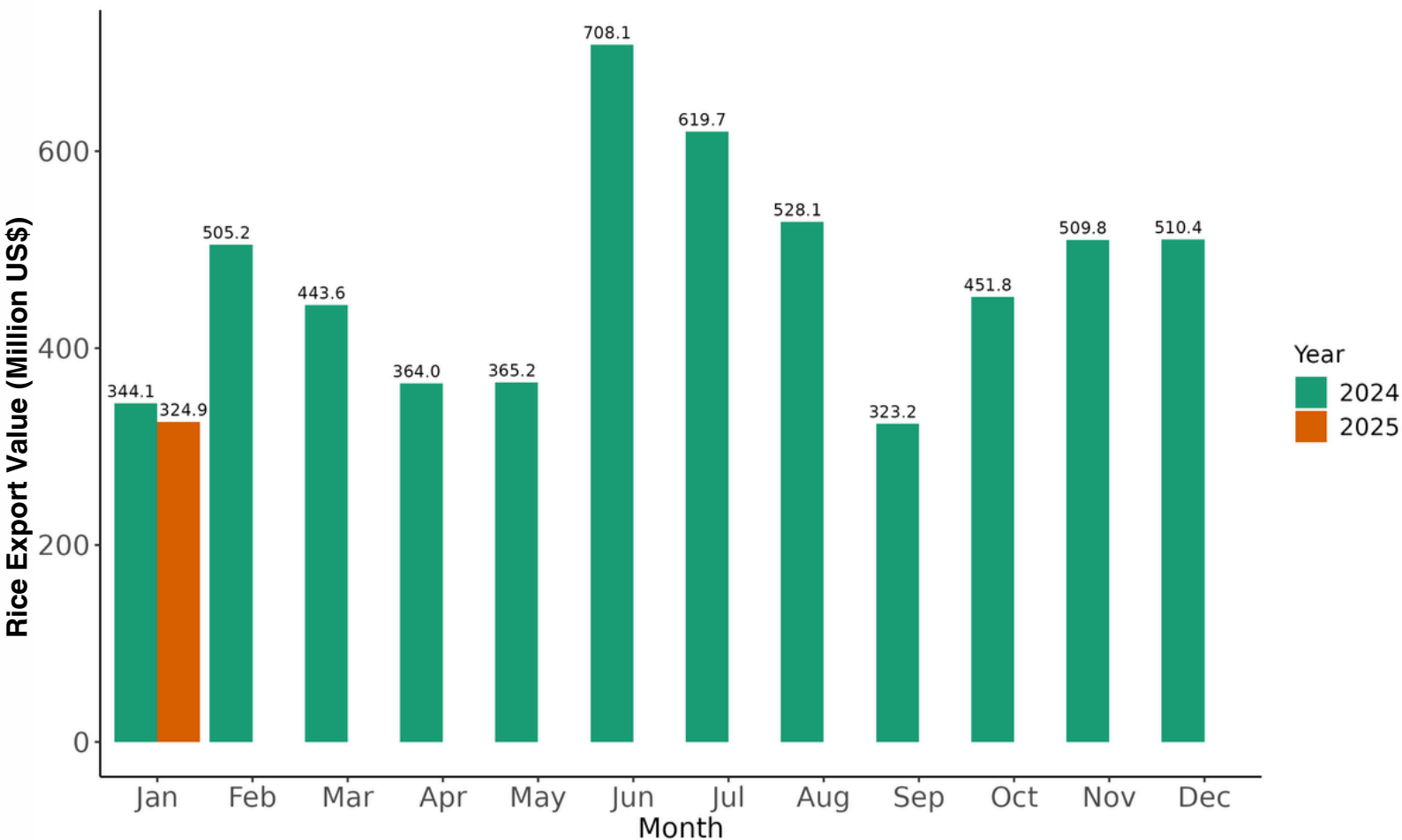


Figure 61: Monthly export value of rice in 2024–2025

Maize and soybean in Vietnam in 2025, for maize, the planted areas of the winter-spring crop are estimated to increase compared to the 2024 crop, while the planted areas for soybeans are expected to decrease. Prices of imported fertilizers dropped by 18.7% in the first month of 2025. As a result, production costs for some agricultural commodities, including maize and soybeans, have decreased. Compared to the same period last year, imports of maize increased in volume but decreased in value in the first month of 2025 (Figure 62–63). In contrast, imports of soybean decreased in both volume and value (Figure 64–65).

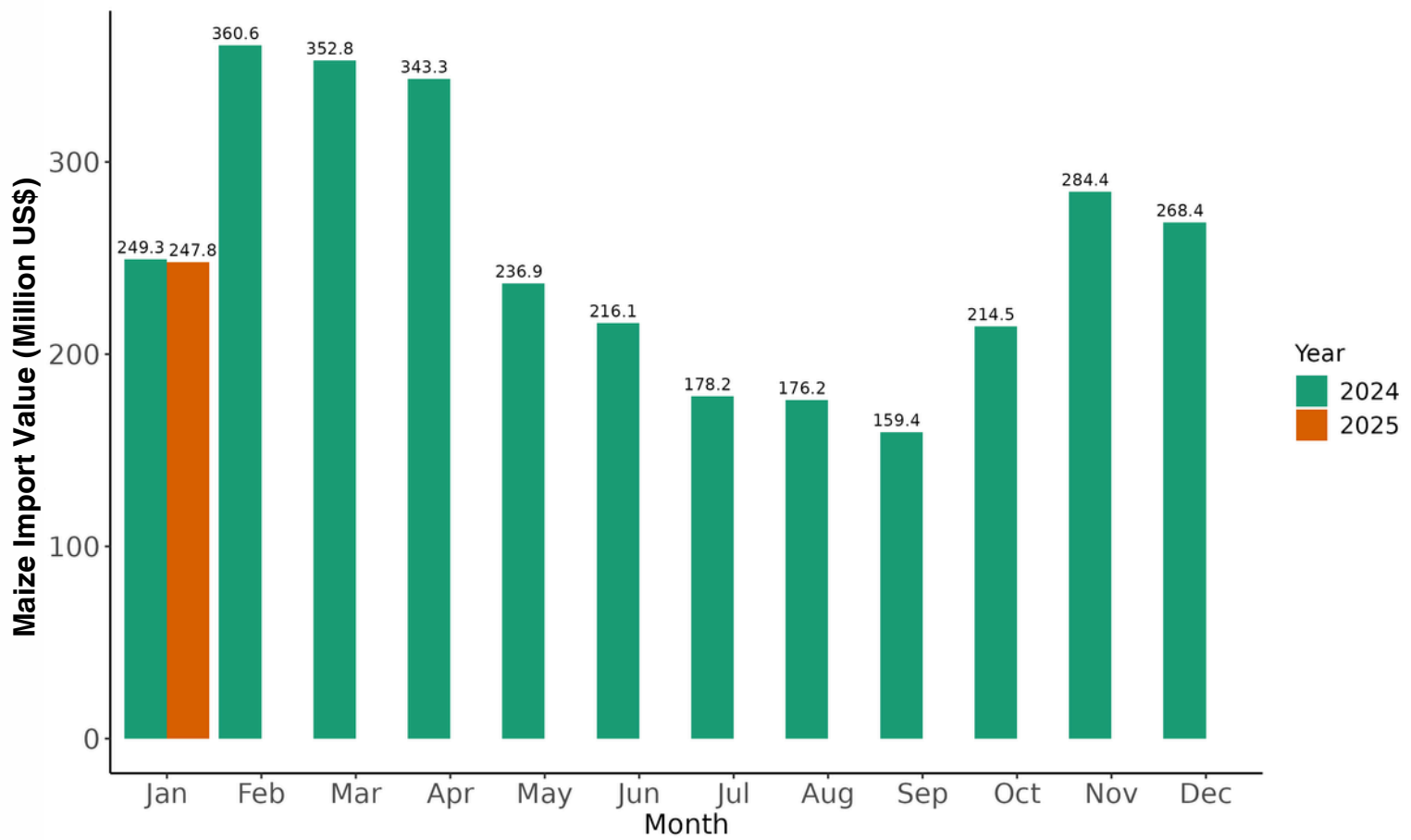


Figure 62: Monthly import value of maize in 2024–2025

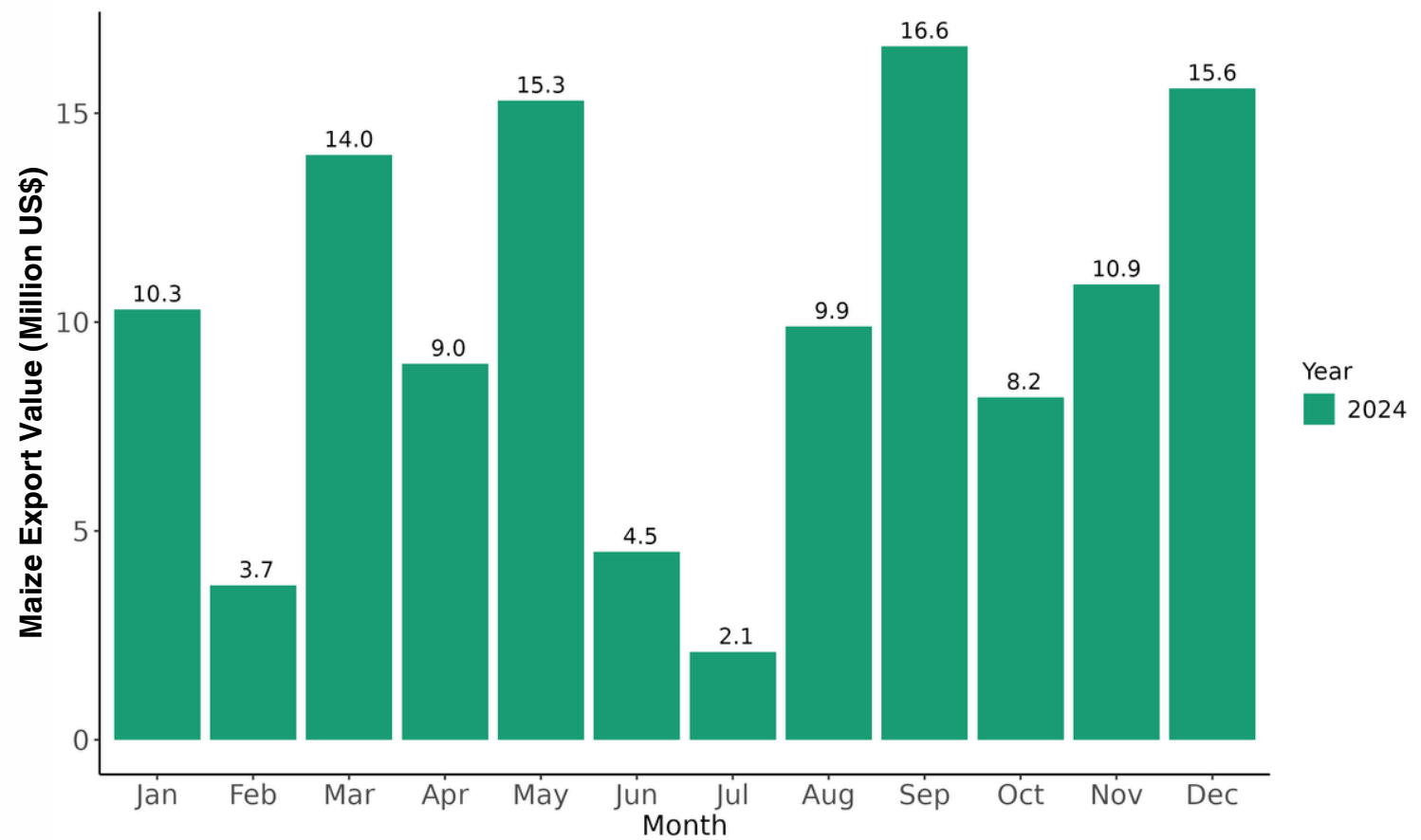


Figure 63: Monthly export value of maize in 2024

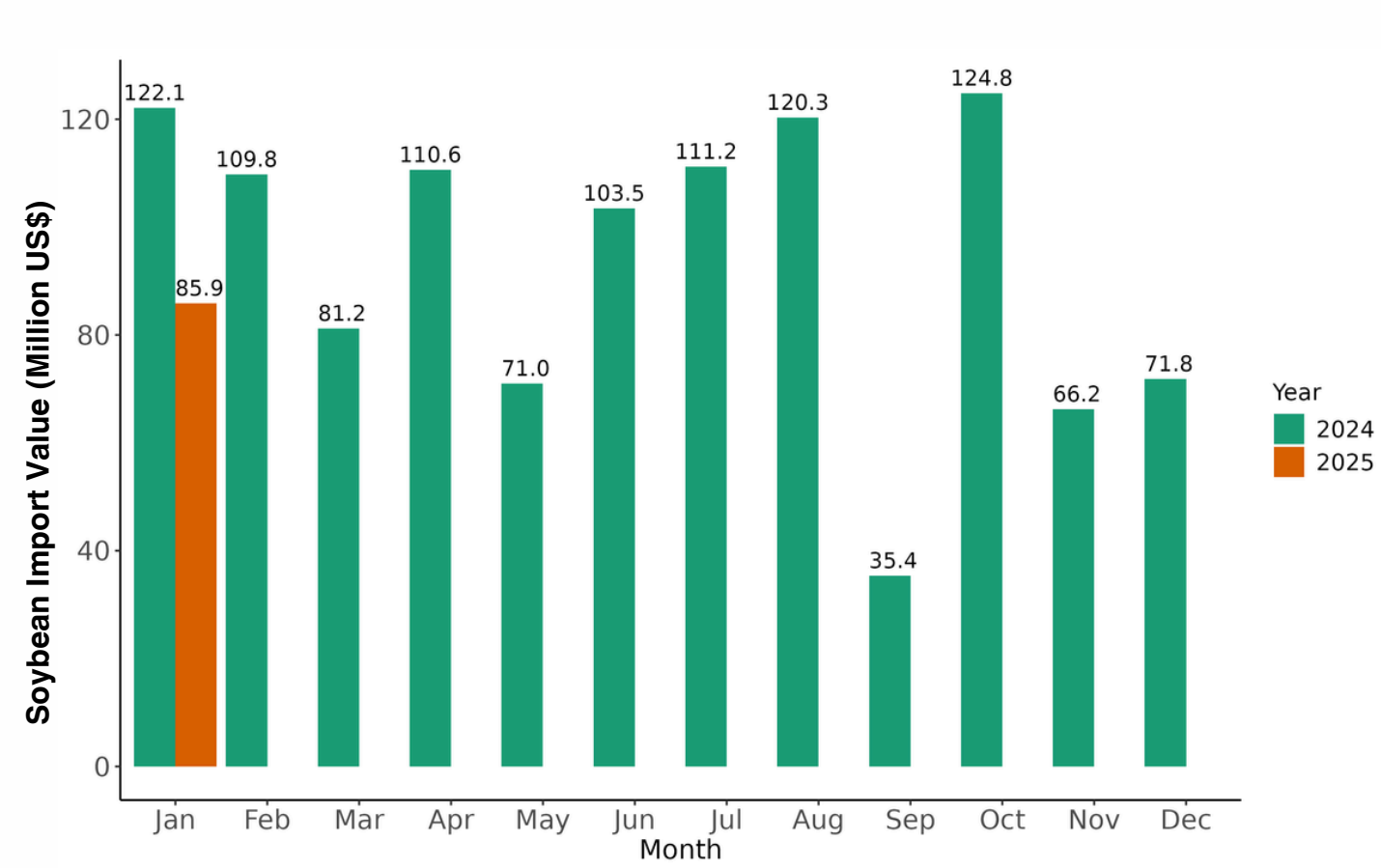


Figure 64: Monthly import value of soybean in 2024–2025

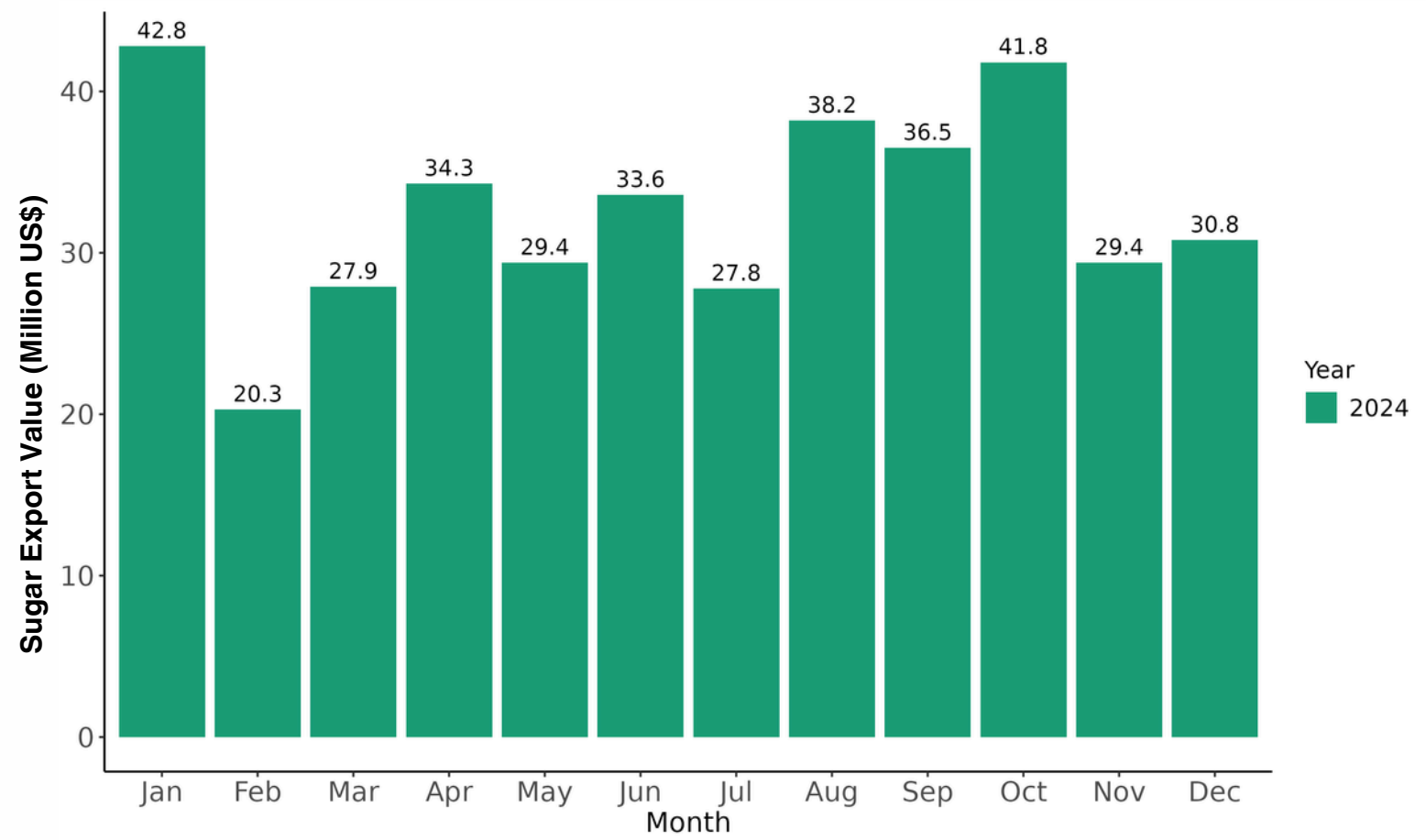


Figure 67: Monthly export value of sugar in 2024

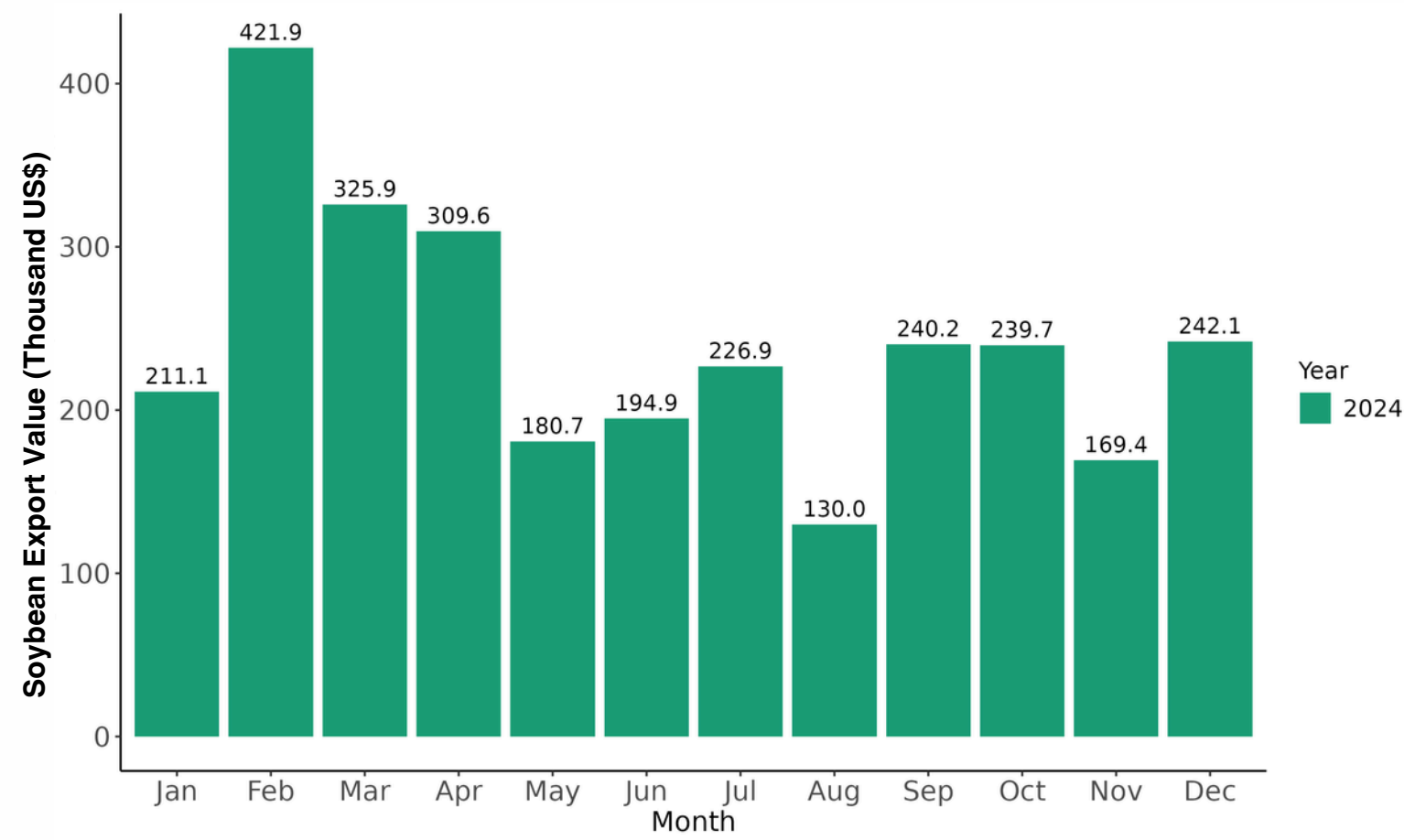


Figure 65: Monthly export value of soybean in 2024

Sugarcane in Vietnam in 2024, according to the Vietnam Sugarcane Association, since 2021, after Vietnam applied trade defense measures on certain imported sugarcane products, the domestic sugar industry has gradually recovered in both area and productivity. Domestic sugar prices in 2024 decreased, following the general downward trend of world sugar prices (Figure 66). The export value of Vietnam’s sugar in 2024 increased significantly by 40.3% compared to the previous year (Figure 67), with high export values to China, Indonesia, Russia, Thailand, and Cambodia. The import value of Vietnam’s sugar in 2024 rose by 10.3% compared to 2023, mainly due to higher imports from Thailand, Cambodia, and China.

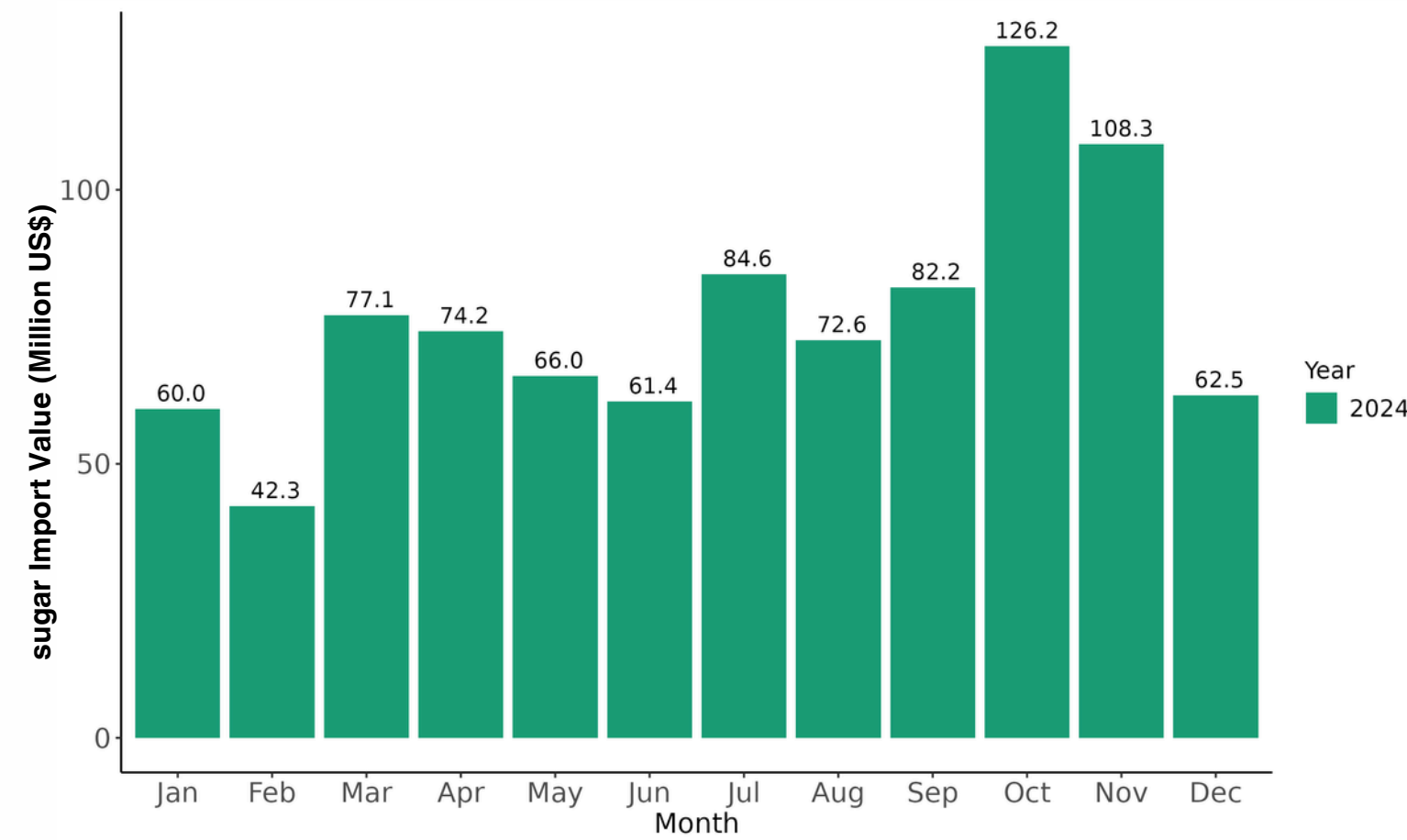


Figure 66: Monthly import value of sugar in 2024

Cassava in Vietnam in 2024, according to the General Statistics Office of Vietnam, Vietnam's cassava area, yield, and overall production increased in 2024 compared to 2023. However, due to reduced demand, both domestic and export cassava prices in 2024 dropped when compared to the previous year. The export value of Vietnam’s cassava in 2024 declined by 11.4% compared to the previous year (Figure 69), mainly as a result of lower exports to China. Meanwhile, the import value of Vietnam’s cassava in 2024 increased significantly by 76.1% compared to 2023 (Figure 68), largely due to higher imports from Lao PDR.

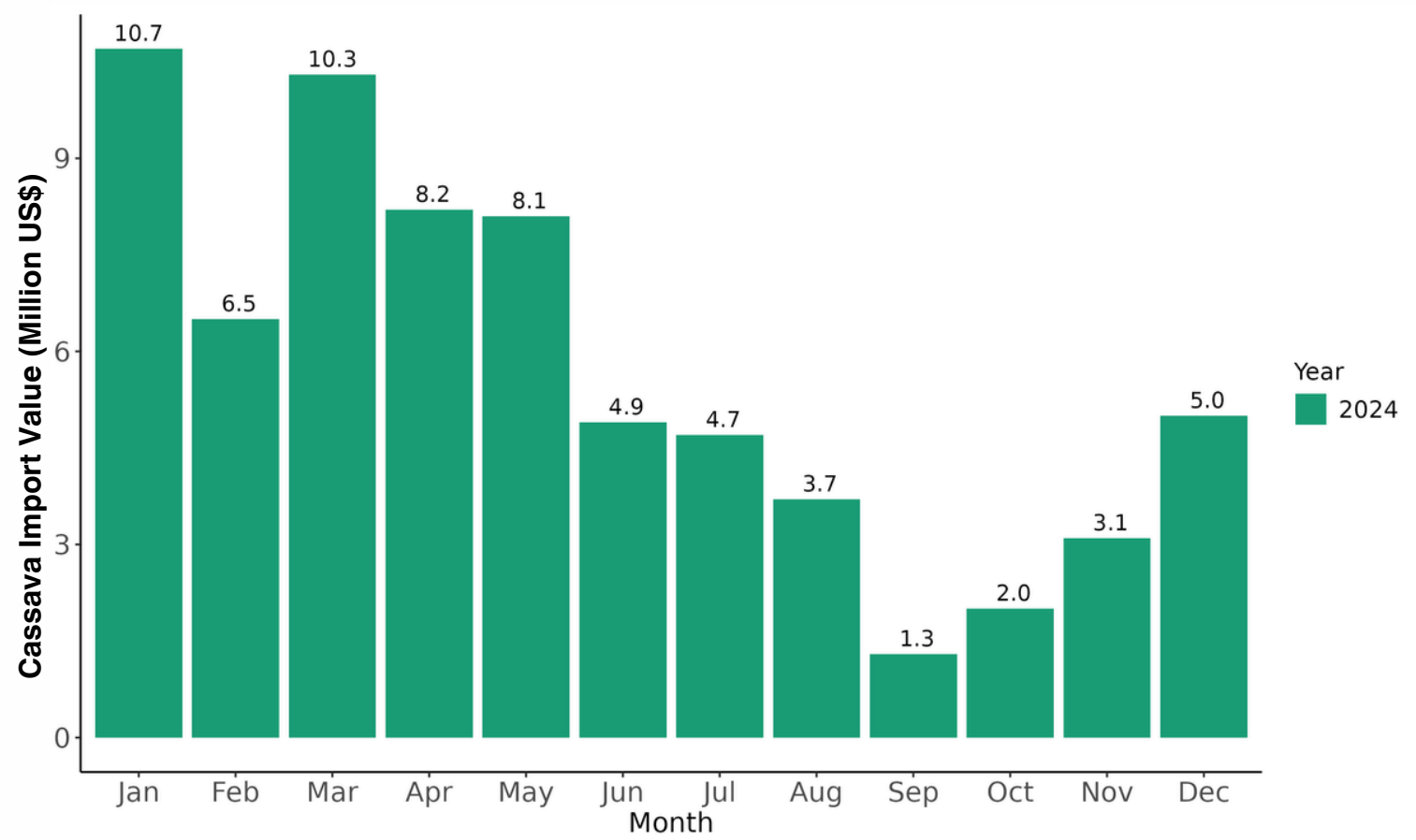


Figure 68: Monthly import value of cassava in 2024

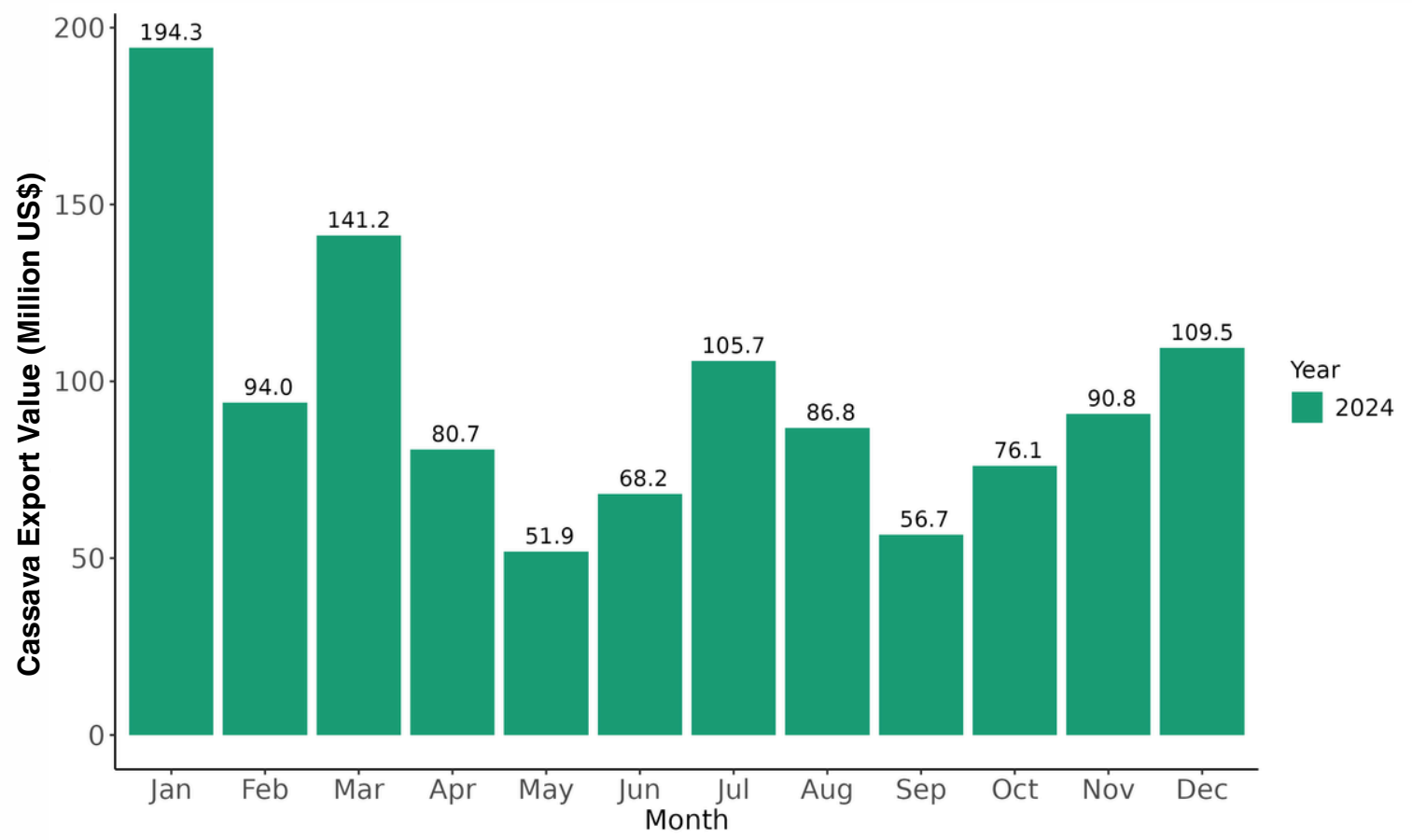


Figure 69: Monthly export value of cassava in 2024

