ASEAN Food Security Information System

RICE GROWING OUTLOOK

REPORT

NOVEMBER 2025

Rice Growing Outlook Report

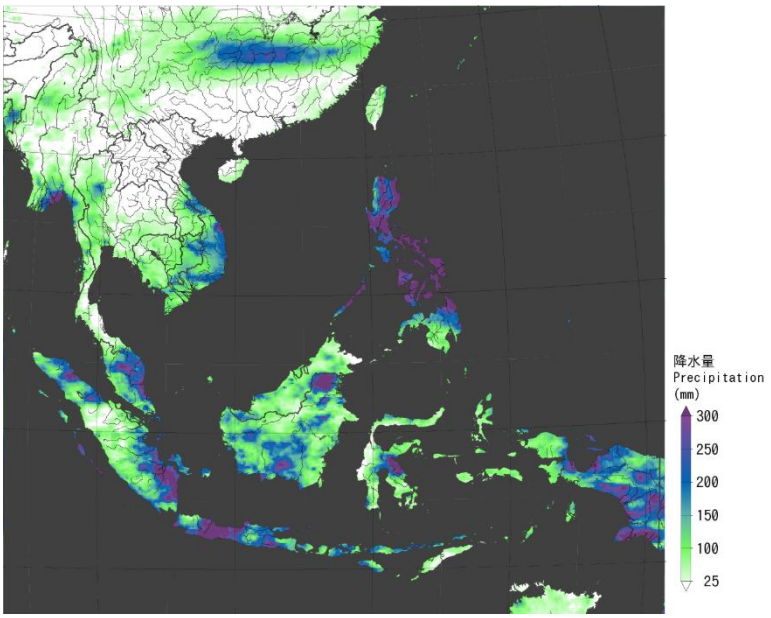
November, 2025

Overview

In the Northern side of SE-Asia, this month is the peak harvest of wet season rice. During September and October, some countries and areas have experienced significant flooding caused by a strong southwest monsoon and several tropical storms. As a result, the yield conditions of wet season rice vary from country to country. The Philippines, which suffered the most severe damage, is expected to be poor yield due to widespread lodging and flooding caused by these typhoons. Yield conditions in other countries and areas are expected to range from slightly poor to good depending on the extent of the damage. Dry season rice cultivation is in land preparation to sowing stage, but is delayed compared to previous years due to the effects of floods.

In the Southern side of SE-Asia, the harvesting of dry season rice is almost finished this November. The yield condition is expected to be good. Sufficient sunlight during the growing season ensures adequate productivity. While, the planting of wet season rice is underway. The crops are currently in the vegetative phase under stable weather conditions.

JASMAI: Precipitation condition in early of November



Brunei

The planting of the wet season rice in Brunei is underway and about 40% are currently in the tillering stage in both irrigated and rainfed areas, while the remaining areas are in land preparation stage and seeding stage. Although Brunei is currently experiencing low precipitation rates with the occasional heavy rainfall, conditions remain favorable due to the high solar radiation and surface temperature during this growth stage. Brunei's rice outlook remains good.

Cambodia

The wet season rice harvested 1,290 thousand ha. The yield increased than last year and it's estimated 3.9 tons per hectare. While, the planted area of dry season rice reached 9% of the national plan (695 thousand hectares). This year the crop growth condition is late compared to last year due to unstable weather condition.

Indonesia

This November is the second month of wet-season rice planting. Progress is slow due to inconsistent rainfall, as farmers wait for the best planting time. The crops are currently in the vegetative phase and are benefiting from recent rainfall.

Additionally, the dry-season rice harvest is almost completed this November, which is 4.6 million hectares, 12.6% more than last year. Sufficient sunlight during the growing season ensures adequate productivity. While heavy rains caused some flooding, but did not cause significant damage to rice growing.

Laos

The wet season of lowland rice is in the last harvesting stage under the good condition. In this month, the harvesting of the wet season rice reached up to 719 hundred thousand hectares accounting for about 94 % of the total planted area, and the production is expected to be more than 3 million tons with 4.21 tons/ha yield, it's estimated to slightly decline than last year.

The harvesting of upland rice has completed. The total harvested area is reached more than 74 thousand hectares and final production is expected to be more than 155 thousand tons with 2.09 tons/ha yield.

Malaysia

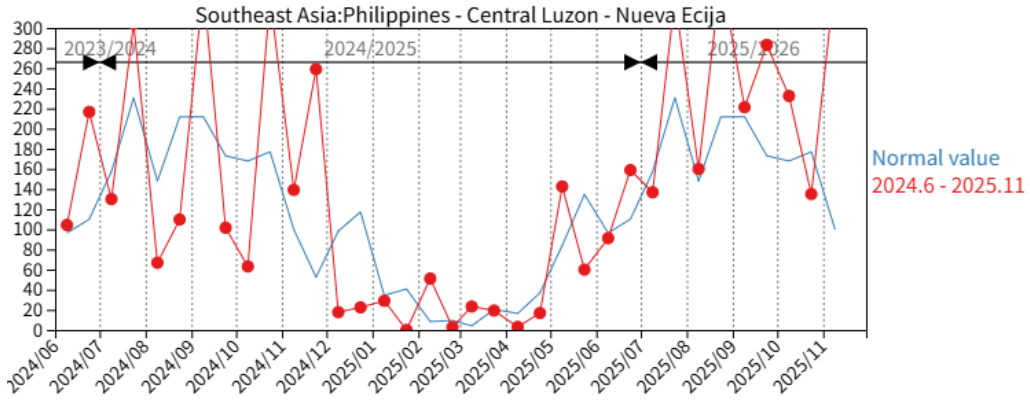
The accumulated planting in wet-season rice covers around 39% of the cultivation plan. Overall, the crop condition ranges from the seedling to tillering stage up to the maturing stage. Weather conditions and irrigation water supply this month are favorable for the paddy fields due to consistent rainfall across all regions. However, some areas have recorded higher rainfall, which has led to flooding, especially in the northern region of Malaysia.

Myanmar

The harvest of wet season rice reaches 1.09 million hectares accounting for 18.2% of the total planted area of 6.0 million hectares. Progress of the harvesting work is slightly earlier than last year. The production is 4.8 million tons of paddy with a yield of 4.4 tons per hectare. The yield is good and slightly higher than last year because the weather had no adverse effect on the production of the wet season rice.

Philippines

Wet season rice planted in July to August, is currently in the maturing to harvesting stage. Recent typhoons have brought heavy to intense rainfall, causing significant damage to agricultural areas. Overall, wet season rice production in most provinces across Luzon and Visayas is poor due to widespread lodging and flooding caused by these typhoons.



JASMAI Nueva Ecija Precipitation graph: Recent typhoons have brought heavy to intense rainfall, causing significant damage

Thailand

The wet season rice is currently in the harvesting period. Production has slightly decreased compared to last year, mainly due to a reduction in the cultivated area and flood damage. In particular, northern regions experienced a decline in production caused by severe flooding in October. The total harvested area is estimated at about 9.56 million hectares, 0.25% lower than last year.

Meanwhile, dry season rice is in the land preparation stage. The planted area is forecast to decrease compared with last year due to the lower rice prices. In addition, ongoing flooding has delayed cultivation activities, disrupting the planned planting schedule.

Vietnam

In the North, the wet season rice is in the harvesting stage, with 0.62 million hectares out of the total 0.98 million hectares planted. Harvesting is expected to be completed within this month. The yield is estimated at around 5.2 tons per hectare, 0,4% lower than last year due to the impact of the storms in late October and early November.

In the South, the remaining wet season rice crops (autumn-winter rice and seasonal rice) are also in being harvesting stage, with a total harvested area of 0.48 million hectares. The yield is forecast at around 5.8 tons per hectare, the same as last year, supported by warm weather and improved irrigation preparation.

On the other hand, some provinces in the Mekong Delta start the sowing of dry season rice (winter-spring season).

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