

Rice Growing Outlook

REPORT



January
2026





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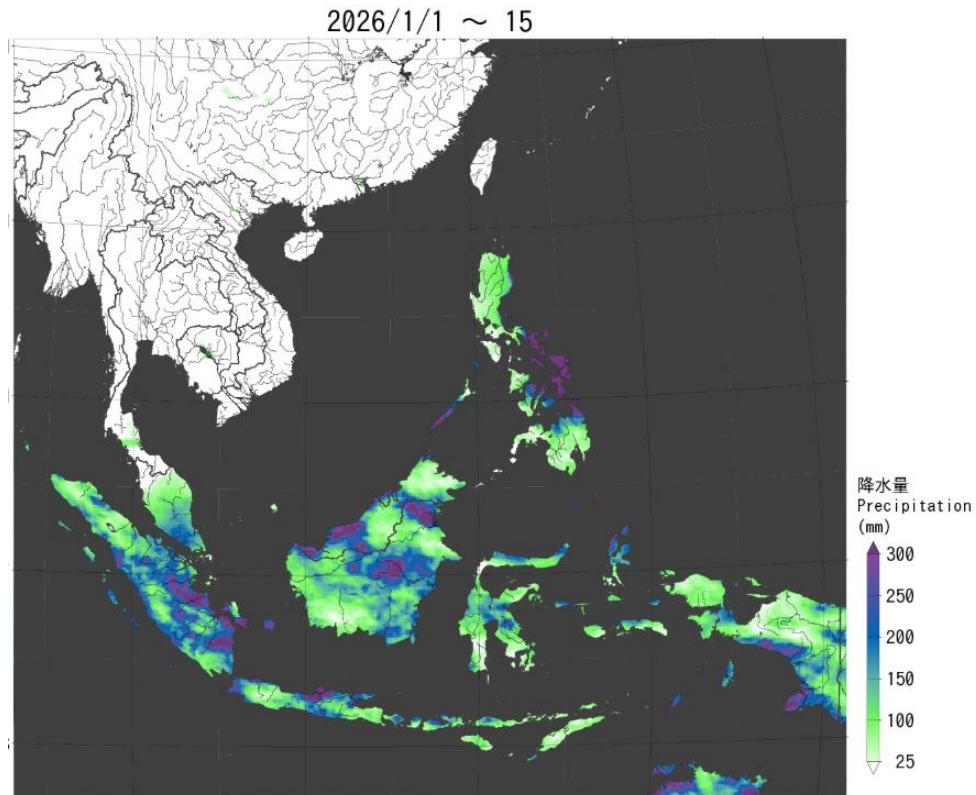
January, 2026

Overview

In the Northern side of SE-Asia, the planting of dry season rice fully starts, excluding North Vietnam, which is in the harvesting season of winter crops. The total planted area of dry season rice is expected to decrease slightly from last season due to factors such as the prolonged effects of the flood at the end of last year. The growth is mainly in the early growing stage, and the growing condition is generally good.

In the Southern side of SE-Asia, the harvesting of wet season rice has started. The yield is expected to be good under good weather conditions during growing period. Planting progress is steadily expanding, driven by significant rainfall from late December to mid-January 2026.

JASMAI: Precipitation condition in early January



Brunei

The wet season rice harvest has started this month. Precipitation rates have been significantly higher resulting in flash floods; however, no growth injuries have been reported. Precipitation rates are expected to remain high which may affect harvest yield in the coming months. The outlook for Brunei's wet season rice is slightly good.

Cambodia

The planted area of dry season rice reached up to 660 thousand hectares, but it decreases 19% for the previous year due to effects of conflict in west-north region.

However, the growing conditions of dry season rice are good, and the average yield is estimated at 4.7 tons per hectare.

Indonesia

This January represents the fourth month of the wet season rice planting, with a cumulative area of 4.5 million hectares. Planting progress is steadily expanding, driven by significant rainfall from late December to mid-January 2026.

Furthermore, the wet season rice harvest began in January, covering 0.4 million hectares. Due to sufficient sunlight during the growth period, the expected yield is moderate.

Laos

The national planting plan of dry season rice in 2025 - 26 is approximately 98 thousand hectares, and the production is expected to be around 443 thousand tons. The planting of dry season rice has started this month and reached up to 23 thousand hectares. The weather conditions and irrigation supply are quite good. The early vegetative growth condition is reported as normal.

Malaysia

The wet season rice planting is nearly complete. Growing conditions are generally favorable, despite irregular rainfall in early January in several areas. On the other hand, the harvesting has started in some areas, covering around 16% of the planted area, with no major damage reported.

For dry season rice, the planting is already underway in some areas in Central Malaysia. About 2% of the cultivated area in granary areas has been planted. Overall, weather conditions and irrigation water supply have been favorable, supporting paddy cultivation.

Myanmar

Dry season rice has been planted on 489 thousand hectares accounting for 43% of the national plan of 1.13 million hectares this year. The progress of planting work is similar to last year. It is also estimated that the planting areas may increase from last year due to higher availability of irrigation water under favorable weather this year. The overall growing condition of the dry season rice is good, and most of the planted rice is now at early vegetative growth stages.

Philippines

Dry season rice planted in November to December 2025 has reached the tillering to young panicle formation stages. Overall crop conditions remain fair due to consistent water supply from irrigation and rainfall. However, yield per hectare may decline compared to the previous year, due to the combined effect of excessive rain during vegetative stages and reported pests and diseases.

Thailand

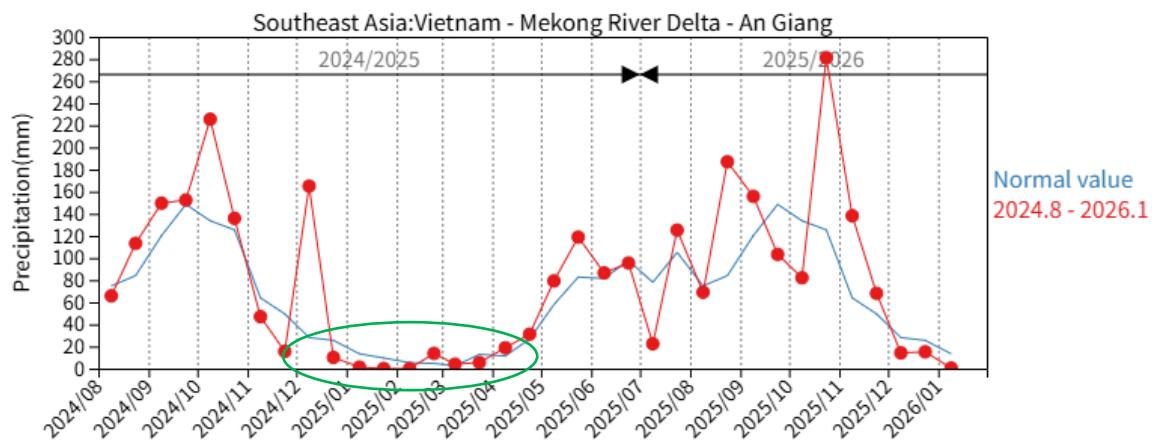
The dry season rice is currently in the tillering stage. The total planted area is forecast to decline by approximately 2% compared with last year, mainly due to lower rice prices and prolonged flooding in some areas through December 2025, which delayed planting activities.

As of January 2026, the accumulated planted area is estimated to be around 1.1 million hectares, accounting for approximately 52% of the national plan. Despite the reduction in planted area, growing conditions remain favorable, supported by an adequate irrigation system and sufficient natural water availability. Under the current outlook, rice yields are expected to increase slightly compared with last year.

Vietnam

In Northern Vietnam, the planting of dry season (winter–spring) rice has not yet commenced, as farmers are still completing the sowing of winter crops.

In Southern Vietnam, dry season rice is currently in the sowing stage, concentrated mainly in the Mekong River Delta. While there are no major issues at present, during the first quarter of 2026, the region may face localized agricultural water stress in the first quarter due to a combination of higher temperatures, reduced rainfall, and saline intrusion, which could affect crop establishment and early growth.



JASMAI precipitation Graph (Mekong River Delta, An Giang): during the first quarter, the region may face localized agricultural water stress in the first quarter due to a combination of higher temperatures, reduced rainfall, and saline intrusion

*JASMAI is an open and free system

<https://jasmai.maff.go.jp/en/>