ASEAN Food Security Information System

Agricultural Commodity Outlook Report

↘ No. 36 - June 2026









Released by
AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
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This collaborative effort truly exemplifies the spirit of cooperation among the ASEAN member countries. The ACO report No. 36, along with its predecessors, stands as a valuable resource benefiting all ASEAN members, policymakers, and relevant agencies. These reports serve as essential tools for planning and policymaking, crucial in ensuring food security within individual nations and the ASEAN regions.

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Thank you



Dr. Sumanya Ngandee
Computer Technical Officer,
Senior Professional Level,
AFSIS Manager

Foreword

The ASEAN Agricultural Commodity Outlook (ACO) Report is a situation analysis of both the supply and demand of food crops for the current year and forecasts for the subsequent year, prepared by the ASEAN Food Security Information System (AFSIS) Secretariat. This report compiles data from the 10 ASEAN member states. As with previous editions, it covers the current situation and outlook for six main commodities, including rice, maize, sugarcane, soybeans, cassava, and laying hens.

In this preview of the ASEAN Agricultural Commodity Outlook, we provide both national and regional information on production, utilization, monitoring the global food crisis and food insecurity, stock, trade, and FOB/CIF prices. The explanation for significant changes and unusual phenomena is also showed in this report. Furthermore, the report is scrutinized by all member states before publication.

AFSIS Secretariat,
Office of Agricultural Economics (OAE),
Ministry of Agriculture and Cooperatives

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Highlights of Rice Outlook for 2027

The forecast for rice supply in ASEAN predicts to rise 9.03 million tons (4.49 percent increases) from 200.91 million tons in 2026 to 209.94 million tons in 2027 of milled rice (Table 1). These increases in supply are primarily attributed to the beginning stock and import, which carried over from the previous year. The beginning stock is forecast to increase by 12.09 million tons (21.49 percent increases) increasing from 56.27 million tons in 2026 to 68.36 million tons in 2027. The rice production in 2027 is forecast to be 131.59 million tons, decreasing from 135.34 million tons in 2026, or 3.75 million tons decrease. However, the import is forecast to rise by 0.69 million tons (7.42 percent decreases) from 9.30 million tons in 2026 to 9.99 million tons in 2027.

The increase in demand of rice is primarily attributed to the domestic utilization, export and ending stock. The domestic utilization is forecast to rise by 2.01 million tons (1.80 percent increases) from 111.82 million tons in 2026 to 113.83 million tons in 2027. The export is expected to increase 0.41 million tons (1.98 percent increases) from 20.74 million tons in 2026 to 21.15 million tons in 2027. The ending stock is expected to rise 6.60 million tons (9.65 percent increases) from 68.36 million tons in 2026 to 74.96 million tons in 2027.

Additionally, the ratio of production to domestic utilization (self-sufficiency ratio) for the region in 2027 is expected to be 115.60 percent, while the beginning stock to domestic utilization ratio (food security ratio) is estimated to be 60.05 percent in 2027 (Table 1).

Table 1. Summary of the ASEAN rice situation from 2026 to 2027 (milled rice).

Unit: Million tons

Items	2026	2027	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	200.91	209.94	9.03	4.49
Beginning stock	56.27	68.36	12.09	21.49
Production	135.34	131.59	-3.75	-2.77
Import	9.30	9.99	0.69	7.42
Demand (Million tons)	200.91	209.94	9.03	4.49
Domestic utilization	111.82	113.83	2.01	1.80
Export	20.74	21.15	0.41	1.98
Ending stock	68.36	74.96	6.60	9.65
Ratio of production to domestic utilization (%)	121.04	115.60	-	-
Ratio of beginning stock to domestic utilization (%)	50.33	60.05	-	-

ASEAN Rice Situation in 2026

Production

The paddy production of ASEAN in 2026 (crop year 2025/2026) records at 209.99 million tons, remarking a growth of 0.54 million tons (0.26 percent increases) compared to the 209.44 million tons recorded in 2025 (crop year 2024/2025). Increases are attributed to an increase only in yields of 0.03 ton per hectares (0.68 percent increases). The increase in yields is observed in Brunei Darussalam, Indonesia, the Philippines, and Vietnam (Tables 2–5, Figures 1–4).

For Brunei Darussalam in 2026 the production is increased due to an increase in planted area and yield. The increases in planted area are supported by supportive government policies and favorable weather conditions. The increase in yield is also driven by favorable weather conditions and farmers practices of applying more fertilizer, well managements, and using better rice varieties.

For Cambodia in 2026, the production is increased due to an increase in planted area. The reasons behind this are still limited.

For Indonesia in 2026, the increase in production is attributed to both expansions in the planted area and yield. These increases are driven by favorable weather conditions, rising rice prices, declining prices of competing crops, and supportive government policies. The increase in yields is driven by favorable weather conditions, well managements, and farmers practices of applying more fertilizer, well managements, and using better rice varieties.

For Lao PDR in 2026, the increase in production is attributed to an expansion in planted area. The increase is driven by decreasing prices of competing crops, supportive government policies, and rain that falls early during the dry season. Even the increase in planted area, the yield is decreased due to fertilizer deficits and a delay in seed distribution forces farmers to miss optimal planting crops period.

For Malaysia in 2026, the production is decreased due to reductions in both planted area and yield. The decrease in planted area is driven by unfavorable weather conditions. Moreover, the decrease in yield is due to the disease outbreak, pest infestations, and effect of drought in the wet and dry seasons.

For Myanmar in 2026, the decrease in production is attributed to the reduction in planted area. The reduction in planted area is affected by rising prices of competing crops and declining rice prices. On the other hand, the yield remains unchanged, despite farmers improving crop management.

For the Philippines in 2026, the decline in rice production is mainly attributed to a reduction in the harvested area. In contrast, the increase in yield is supported by the early onset of rainfall during the wet season, improved fertilizer application by farmers, better crop management practices, and the adoption of higher-yielding rice varieties. During the wet season, the harvested area increased due to government support programs, including the provision of seeds and fertilizers, as well as the availability of sufficient irrigation water. However, planting activities during the dry season were delayed due to the occurrence of heavy rainfall.

For Thailand in 2026, the decline in rice production is mainly attributed to a

reduction in the planted area. The decrease in planted area is driven by lower rice prices, which have encouraged farmers to reduce rice cultivation and shift to competing crops offering higher returns during both the wet and dry seasons.

Meanwhile, the rice yield is expected to remain relatively stable, as reservoir water storage levels are sufficient to support crop growth throughout both cropping seasons. However, rice production may still be affected by adverse weather conditions and other production risks, including floods, drought, pest infestations, and disease outbreaks.

For Vietnam in 2025, the increase in rice production is attributed to both higher planted area and yield, supported by favorable weather conditions and improved crop management. However, reductions in planted area during spring season in the south are influenced by government policies.

Utilization and Stock

The domestic utilization of rice (milled rice) in ASEAN in 2026 increases by 1.95 million tons (1.77 percent increases) of 111.82 million tons from 109.87 million tons in 2025 (Tables 7–8).

The ratio of production to domestic utilization (self-sufficient ratio) of ASEAN in 2026 is at 121.0 percent, a decrease from 122.9 percent in 2025. The self-sufficiency ratio decreases in Cambodia, Malaysia, Myanmar, the Philippines, and Thailand, while increases are observed in Brunei Darussalam, Indonesia, Lao PDR, and Vietnam. The high ratios are found in Thailand, Vietnam, and Myanmar, respectively (Table 10, Figure 12). However, on a country-by-country basis, some countries in the region still needed to import rice for their domestic consumption.

The ratio of the beginning stock to the domestic utilization (food security ratio) of ASEAN in 2026 is at 50.3 percent as the ASEAN's average level, which increases by 12.5 percent from 2025. The ratios of Cambodia, Myanmar, and Thailand are higher than the average level.

Myanmar has the highest ratio at 151.0 percent, which is followed by Thailand at 103.5 percent and Cambodia at 56.0 percent, while other countries are below the average level. The beginning stock in 2026 of ASEAN is at 56.27 million tons, increasing 14.74 million tons (35.50 percent increases) from 41.53 million tons in 2025 (Table 11, Figure 13).

In summary, ASEAN's paddy rice production is projected to increase slightly by 0.26 percent, mainly due to improved rice yields despite relatively stable planted areas. Production growth is expected in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, and Vietnam, supported by favorable weather conditions, government policies, and improved crop management. In contrast, production is projected to decline in Malaysia, Myanmar, the Philippines, and Thailand, primarily due to reductions in planted or harvested areas, along with the impacts of unfavorable weather, pests, diseases, and shifts to more profitable competing crops. Although domestic rice utilization is expected to increase, ASEAN is projected to remain self-sufficient in rice, with an SSR of 121.0 percent. In addition, the higher FSR in 2026 reflects increased beginning stocks, indicating an improvement in regional rice availability and food security despite production challenges in several member countries.

Trade

In 2026, the entire ASEAN region exports 20.74 million tons of milled rice, remarking an increase of 0.83 million tons (4.16 percent increases) from 19.91 million tons in 2025. Additionally, the two major exporting countries, including Vietnam and Thailand, export approximately 10.48 and 7.53 million tons, respectively (Tables 7–8 and Figures 5–6).

The total rice imports of ASEAN in 2026 are at 9.30 million tons, a decrease of 0.22 million tons (2.34 percent decreases) from 9.52 million tons in 2025. In the Philippines, the import of milled rice is predicted at 3.60 million tons in 2026 (AFSIS forecast), making it the largest importer in the ASEAN region (Tables 7–8, Figures 8–9).

Prices

The quantity and value of rice exports from ASEAN countries by countries of destination and the quantity and value of rice imports by countries of origin are given in Tables 12–13.

Monthly FOB prices for rice exports and CIF prices for rice imports in selected ASEAN countries during 2025 and 2026 (January–December) are presented in Tables 14–15 and Figures 14–16.

Damage Area

In 2026, the estimated damaged area of paddy of ASEAN amounts to 365,014 hectares. Of this, 265,282 hectares, or 72.68 percent, are attributed to floods, while 97,376 hectares, or 26.68 percent, are attributed to droughts. Thailand bore the brunt of the flood damage, accounting for 175,350 hectares, or 66.10 percent. Additionally, factors such as drought, pests, diseases, and other factors contributed to the overall damage (Table 6)

Prospects for Rice in 2027

Production

ASEAN paddy production in 2027 (crop year 2026/2027) is estimated at 204.30 million tons, decreasing by 5.69 million tons (2.71 percent decreases) from 209.99 million tons in 2026 (Tables 2–5, Figures 1–4).

Utilization and Stock

The domestic utilization of milled rice in ASEAN in 2027 is expected to be 113.83 million tons, an increase of about 2.01 million tons (1.80 percent increases), compared to 111.82 million tons in 2026 (Tables 8–9).

The beginning stock for 2027 is forecast at 68.36 million tons, an increase of 12.09 million tons (21.48 percent increases) from the 56.27 million tons recorded in 2026. Additionally, the ending stock is expected to rise by 6.60 million tons (9.65 percent increases), growing from 68.36 million tons in 2026 to 74.96 million tons in 2027 (Tables 8–9 and Figure 11).

The ratio of production to domestic utilization (self-sufficiency ratio) is estimated to be 115.60 percent in 2027, decreasing from 121.04 percent in 2026. This indicates that rice production in some regions of ASEAN will still be sufficient, but some countries will need to import rice to meet domestic consumption (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization (food security ratio) in ASEAN in 2027 is estimated to be 60.05 percent, increasing from 50.33 percent in 2026 (Table 11, Figure 13).

Trade

The milled rice imports of ASEAN are estimated to increase from 9.30 million tons in 2026 to 9.99 million tons in 2027, rising at 0.69 million tons (7.47 percent increases) (Tables 8–9, Figures 8 and 10).

For the export, the whole ASEAN is estimated to export 21.15 million tons in 2027, declining at 0.41 million tons (1.99 percent increases), compared to 20.74 million tons in 2026 (Tables 8–9, Figures 5 and 7).

Summary

Although ASEAN paddy production is projected to increase slightly by 0.26% in 2026, the improvement is primarily driven by higher yields rather than expansion of cultivated areas. Production trends vary among member countries depending on weather conditions, government support, input use, and farmers' responses to market prices. Several major producing countries, including Thailand, Myanmar, Malaysia, and the Philippines, are expected to experience production declines due to reduced planting areas, adverse weather, pests, diseases, and shifts toward more profitable competing crops. Similar trends have also been observed globally, where FAO forecasts world rice production to decline from the record level in 2025/26 as weather uncertainties, particularly the potential effects of El Niño, continue to threaten production in several major rice-producing regions [1,2].

Despite the slight production increase in ASEAN, domestic rice utilization is expected to continue rising, resulting in a small decline in the regional Self-Sufficiency Ratio (SSR). Nevertheless, ASEAN remains a net surplus rice-producing region with an SSR exceeding 120%, while the Food Security Ratio (FSR) improves substantially due to higher beginning stocks. This is consistent with the global rice outlook, which indicates that although production may decline slightly, global rice supplies remain

relatively adequate because of large carryover stocks accumulated from previous seasons [1,3]. Consequently, international rice markets are expected to remain relatively stable, although regional price volatility may still occur in response to weather risks, geopolitical uncertainties, and changing trade policies [1,2,4].

In addition, rice prices are expected to remain supported by strong demand and tightening supplies of export-quality rice. FAO reported that the global rice price index increased in mid-2026 due to stronger Asian import demand and higher production and transportation costs [1]. Likewise, Thailand's rice industry outlook suggests that exports may face increasing competition from India and Vietnam, while production remains vulnerable to climate variability despite adequate irrigation infrastructure [3]. These findings indicate that maintaining productivity through improved crop management, climate adaptation measures, and strategic stock management will remain essential for strengthening both ASEAN and global rice security under increasingly uncertain production environments [1–5].

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Table 2. Paddy production in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**209,442.75**	**209,986.88**	**544.13**	**0.26**	**204,297.29**	**-5,689.59**	**-2.71**
Brunei	3.99	4.19	0.20	5.06	4.36	0.17	4.04
Cambodia	15,091.00*	15,105.26*	14.26	0.09	15,694.80*	589.54	3.90
Indonesia	60,207.10	61,325.12	1,118.01	1.86	61,840.49	515.37	0.84
Lao PDR	3,774.71	3,940.94	166.23	4.40	4,015.00	74.06	1.88
Malaysia	2,214.40	2,174.44	-39.95	-1.80	2,159.91	-14.53	-0.67
Myanmar	30,304.27	29,119.64	-1,184.62	-3.91	31,265.51*	2,145.87	7.37
Philippines	19,238.81*	18,358.21*	-880.60	-4.58	18,358.21*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	35,261.40	35,006.70	-254.70	-0.72	26,006.63	-9,000.06	-25.71
Vietnam	43,347.08	44,952.38	1,605.30	3.70	44,952.38	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/P refers to Not Planting.

Table 3. Paddy planted area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**47,716.29**	**47,659.93**	**-56.35**	**-0.12**	**47,074.99**	**-584.94**	**-1.23**
Brunei	1.72	1.74	0.02	1.04	1.77	0.03	2.00
Cambodia	4,084.00*	4,100.00*	16.00	0.39	4,100.00*	0.00	0.00
Indonesia	11,396.61	11,495.91	99.30	0.87	11,397.99	-97.92	-0.85
Lao PDR	916.14	1,019.94	103.80	11.33	1,034.51	14.57	1.43
Malaysia	580.38	579.71	-0.67	-0.12	579.51	-0.19	-0.03
Myanmar	7,133.30	7,078.75	-54.55	-0.76	7,147.35*	68.60	0.97
Philippines	4,616.47*	4,391.92*	-224.55	-4.86	4,391.92*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	11,868.52	11,773.07	-95.45	-0.80	11,203.04	-570.03	-4.84
Vietnam	7,119.15	7,218.90	99.75	1.40	7,218.90	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/P refers to Not Planting.

Table 4. Paddy harvested area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**47,125.06**	**46,951.33**	**-173.73**	**-0.37**	**46,711.62**	**-239.72**	**-0.51**
Brunei	1.64	1.69	0.05	3.00	1.72	0.03	2.00
Cambodia	4,041.00*	4,100.00*	59.00	1.46	4,100.00*	0.00	0.00
Indonesia	11,320.99	11,397.99	77.01	0.68	11,397.99	0.00	0.00
Lao PDR	911.51	1,019.94	108.43	11.90	1,034.51	14.57	1.43
Malaysia	578.38	579.43	1.06	0.18	579.24	-0.19	-0.03
Myanmar	6,998.02	6,729.46	-268.56	-3.84	7,147.35*	417.89	6.21
Philippines	4,616.47*	4,391.92*	-224.55	-4.86	4,391.92*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	11,603.47	11,512.00	-91.47	-0.79	10,839.99	-672.02	-5.84
Vietnam	7,053.60	7,218.90	165.30	2.34	7,218.90	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/P refers to Not Planting.

Table 5. Paddy yield in ASEAN countries from 2025 to 2027.

Unit: ton/hectare

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**4.44**	**4.47**	**0.03**	**0.68**	**4.37**	**-0.10**	**-2.24**
Brunei	2.43	2.48	0.05	2.06	2.53	0.05	2.02
Cambodia	3.73*	3.68*	-0.05	-1.34	3.83*	0.15	4.08
Indonesia	5.32	5.38	0.06	1.13	5.43	0.05	0.93
Lao PDR	4.14	3.86	-0.28	-6.76	3.88	0.02	0.52
Malaysia	3.83	3.75	-0.08	-2.09	3.73	-0.02	-0.53
Myanmar	4.33	4.33	0.00	0.00	4.37*	0.04	0.92
Philippines	4.17*	4.18*	0.01	0.24	4.18*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	3.04	3.04	0.00	0.00	2.40	-0.64	-21.05
Vietnam	6.15	6.23	0.08	1.30	6.23	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/P refers to Not Planting.

Table 6. Paddy damaged area in ASEAN countries by cause of damage in 2026.

Unit: hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	**265,282**	**97,378**	**1,966**	**114**	**0**	**273**	**365,014**
Brunei	12	12	13	14	0	0	51
Cambodia	0	0	0	0	0	0	0
Indonesia	84,217	11,950	1,754	0	0	0	97,921
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	273	273
Myanmar	5,703	0	0	0	0	0	5,703
Philippines	0	0	0	0	0	0	0
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	175,350	85,416	200	100	0	0	261,066
Vietnam	0	0	0	0	0	0	0

Remarks: N/P refers to Not Planting.

Table 7. Rice balance sheet of ASEAN countries in 2025 (milled rice)

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**41,529,766**	**135,001,024**	**9,522,117**	**186,052,907**	**109,870,989**	**19,909,613**	**56,272,305**	**186,052,907**
Brunei	8,928	2,594	31,038	42,560	30,216	0	12,344	42,560
Cambodia	3,426,142*	9,658,240*	N/A	13,084,382	7,886,894*	665,248*	4,532,240*	13,084,382
Indonesia	8,402,277	38,544,586	450,693	47,397,556	34,973,892	38	12,423,626	47,397,556
Lao PDR	109,079	2,264,826	34,820	2,408,725	2,287,391	61,683	59,651	2,408,725
Malaysia	0	1,417,213	1,487,773	2,904,986	2,770,703*	134,283	0	2,904,986
Myanmar	16,364,330	19,128,054	0	35,492,384	13,232,275	1,641,188	20,618,921	35,492,384
Philippines	3,437,480*	12,890,000*	3,500,000*	19,827,480	16,100,000*	0*	3,727,480*	19,827,480
Singapore	0	N/P	507,416	507,416	263,666	243,750	0	507,416
Thailand	7,462,946*	22,919,910	31,611	30,414,467	11,071,810	7,900,585	11,442,072*	30,414,467
Vietnam	2,318,584	28,175,601	3,478,766	33,972,951	21,254,142	9,262,838	3,455,971	33,972,951

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 8. Rice balance sheet of ASEAN countries in 2026 (milled rice).

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**56,272,305**	**135,340,358**	**9,299,595**	**200,912,258**	**111,817,448**	**20,736,902**	**68,357,909**	**200,912,258**
Brunei	12,344	2,725	25,112	40,180	29,426	0	10,754	40,180
Cambodia	4,532,240*	9,667,368*	N/A	14,199,608	8,096,800*	685,206*	5,417,603*	14,199,608
Indonesia	12,423,626	39,260,339	39,271	51,723,236	35,598,266	794	16,124,176	51,723,236
Lao PDR	59,651	2,364,564	32,258	2,456,473	2,325,052	54,663	76,759	2,456,473
Malaysia	0	1,391,642	1,600,000*	2,991,642	2,861,642*	130,000*	0	2,991,642
Myanmar	20,618,921	18,380,320	0	38,999,241	13,652,319	1,700,000*	23,646,922	38,999,241
Philippines	3,727,480*	12,300,000*	3,600,000*	19,627,480	16,400,000*	0	3,227,480	19,627,480
Singapore	0	N/P	409,468*	409,468	250,371*	159,098*	0	409,468
Thailand	11,442,072*	22,754,353	6,058	34,202,483	11,079,810	7,530,000	15,592,673	34,202,483
Vietnam	3,455,971	29,219,047	3,587,428	36,262,446	21,523,761	10,477,142	4,261,543	36,262,446

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 9. Rice balance sheet of ASEAN countries in 2027 (milled rice).

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**68,357,909**	**131,587,279**	**9,994,171**	**209,939,358**	**113,832,445**	**21,149,857**	**74,957,056**	**209,939,358**
Brunei	10,754	2,835	25,531	39,120	29,443	0	9,677	39,120
Cambodia	5,417,603*	10,044,672*	N/A	15,462,275	8,312,904*	705,762*	6,443,609*	15,462,275
Indonesia	16,124,176	39,590,281	0	55,714,457	35,299,248	548	20,414,661	55,714,457
Lao PDR	76,759	2,409,000	30,590	2,516,349	2,334,663	58,465	123,220	2,516,349
Malaysia	0	1,382,342	1,600,000*	2,982,342	2,852,342*	130,000*	0	2,982,342
Myanmar	23,646,922	19,734,790*	0	43,381,712	14,063,317*	1,700,000*	27,618,395	43,381,712
Philippines	3,227,480*	12,300,000*	3,600,000*	19,127,480	16,400,000*	0	2,727,480	19,127,480
Singapore	0	N/P	458,442*	458,442	257,018*	201,424*	0	458,442
Thailand	15,592,673	16,904,312	30,000*	32,526,985	11,115,290*	7,176,798*	14,234,897	32,526,985
Vietnam	4,261,543	29,219,047	4,249,608	37,730,198	23,168,220	11,176,860	3,385,117	37,730,198

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 10. Ratio of rice's production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**135,001,023.6**	**109,870,989.0**	**122.9**	**135,340,358.2**	**111,817,447.7**	**121.0**	**131,587,278.9**	**113,832,445.4**	**115.6**
Brunei	2,593.6	30,216.0	8.6	2,724.8	29,426.5	9.3	2,834.9	29,443.0	9.6
Cambodia	9,658,240.0	7,886,894.0	122.5	9,667,368.4	8,096,799.9	119.4	10,044,672.0	8,312,904.0	120.8
Indonesia	38,544,586.0	34,973,892.0	110.2	39,260,339.0	35,598,266.0	110.3	39,590,281.0	35,299,248.0	112.2
Lao PDR	2,264,826.0	2,287,391.0	99.0	2,364,564.0	2,325,052.3	101.7	2,409,000.0	2,334,663.1	103.2
Malaysia	1,417,213.0	2,770,703.0	51.2	1,391,642.0	2,861,642.0	48.6	1,382,342.0	2,852,342.0	48.5
Myanmar	19,128,054.0	13,232,275.0	144.6	18,380,320.0	13,652,319.0	134.6	19,734,790.0	14,063,317.0	140.3
Philippines	12,890,000.0	16,100,000.0	80.1	12,300,000.0	16,400,000.0	75.0	12,300,000.0	16,400,000.0	75.0
Singapore	N/P	263,666.0	0.0	N/P	250,371.0	0.0	N/P	257,018.0	0.0
Thailand	22,919,910.0	11,071,810.0	207.0	22,754,353.0	11,079,810.0	205.4	16,904,312.0	11,115,290.0	152.1
Vietnam	28,175,601.0	21,254,142.0	132.6	29,219,047.0	21,523,761.0	135.8	29,219,047.0	23,168,220.4	126.1

Remarks: N/P refers to Not Planting.

Table 11. Ratio of rice's beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**41,529,766.5**	**109,870,989.0**	**37.8**	**56,272,304.9**	**111,817,447.7**	**50.3**	**68,357,909.1**	**113,832,445.4**	**60.1**
Brunei	8,928.0	30,216.0	29.6	12,343.6	29,426.5	42.0	10,753.8	29,443.0	36.5
Cambodia	3,426,142.0	7,886,894.0	43.4	4,532,239.8	8,096,799.9	56.0	5,417,602.7	8,312,904.0	65.2
Indonesia	8,402,277.0	34,973,892.0	24.0	12,423,626.0	35,598,266.0	34.9	16,124,176.0	35,299,248.0	45.7
Lao PDR	109,079.5	2,287,391.0	4.8	59,651.5	2,325,052.3	2.6	76,758.6	2,334,663.1	3.3
Malaysia	0.0	2,770,703.0	0.0	0.0	2,861,642.0	0.0	0.0	2,852,342.0	0.0
Myanmar	16,364,330.0	13,232,275.0	123.7	20,618,921.0	13,652,319.0	151.0	23,646,922.0	14,063,317.0	168.2
Philippines	3,437,480.0	16,100,000.0	21.4	3,727,480.0	16,400,000.0	22.7	3,227,480.0	16,400,000.0	19.7
Singapore	0.0	263,666.0	0.0	0.0	250,371.0	0.0	0.0	257,018.0	0.0
Thailand	7,462,946.0	11,071,810.0	67.4	11,442,072.0	11,079,810.0	103.3	15,592,673.0	11,115,290.0	140.3
Vietnam	2,318,584.0	21,254,142.0	10.9	3,455,971.0	21,523,761.0	16.1	4,261,543.0	23,168,220.4	18.4

Table 12. Quantity and value of rice exports by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	18	29,655	18	29,655	0	919	18	30,574
Lao PDR	Thailand	994	312,596	13,911	5,531,218	1,716	1,016,019	15,627	6,547,237
	Vietnam	12,917	5,218,622						
Malaysia	Indonesia	25,837	11,082,645	25,850	11,097,374	0	0	25,850	11,097,374
	Philippines	0.20	507						
	Singapore	13	14,222						
Myanmar	Malaysia	3,486	1	80,501	25	315,861	98	396,361	123
	Philippines	70,933	22						
	Singapore	830	0.28						
	Timor-Leste	1,175	0						
	Vietnam	4,077	1						
Philippines	-	0	0	0	0	18.67	24,050	18.67	24,050
Singapore	-	0	0	0	0	0	0	0	0
Thailand	Brunei	4,221	4,178,859	278,486	124,984,722	1,362,522	806,109,457	1,641,008	931,094,179
	Cambodia	78	55,207						
	Lao PDR	9,670	3,605,393						
	Malaysia	134,229	48,739,007						
	Myanmar	2,787	1,193,116						
	Philippines	96,177	36,013,850						
	Singapore	29,432	29,859,935						
	Vietnam	1,892	1,339,355						
Vietnam	Brunei	122	84,391	1,930,031	842,997,082	1,352,174	694,680,042	3,282,205	1,537,677,124
	Cambodia	7,675	4,044,055						
	Indonesia	4,386	1,897,430						
	Malaysia	181,470	73,447,276						
	Philippines	1,691,296	740,480,967						
	Singapore	45,082	23,042,963						

Remarks: N/A refers to Not Available.
The hyphen (-) indicates no country destination's export.

Table 13. Quantity and value of rice imports by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	Cambodia	11,803	N/A	25,112	N/A	0	0	25,112	N/A
	Thailand	13,309	N/A						
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	20	11,961	20	12,294	1,492	1,404,747	1,512	1,417,041
	Singapore	0.02	21						
	Thailand	0.01	312						
Lao PDR	Thailand	2,302	706,744	2,800	793,494	5,232	2,735,818	8,032	3,529,312
	Vietnam	498	86,750						
Malaysia	Cambodia	25,219	18,101,416	171,466	79,595,409	63,943	36,950,970	235,409	116,546,380
	Thailand	61,836	23,600,228						
	Vietnam	84,411	37,893,766						
Myanmar	-	0	0	0	0	0	0	0	0
Philippines	Cambodia	25,056	10,134,240	1,325,170	510,238,433	10,079	28,869,496	1,335,249	539,107,929
	Myanmar	48,582	16,340,852						
	Thailand	99,504	40,296,335						
	Vietnam	1,152,029	443,467,006						
Singapore	Cambodia	4,982	3,320,199	257,547	189,702,125	151,921	90,204,078	409,468	279,906,203
	Malaysia	6	14,135						
	Myanmar	3,033	1,129,520						
	Philippines	30	44,225						
	Thailand	114,692	115,528,033						
	Vietnam	134,805	69,666,013						
Thailand	Cambodia	0.10	1,345	3,040	2,045,876	3,019	4,062,411	6,059	6,108,287
	Lao PDR	423	168,723						
	Thailand[a]	713	760,999						
	Vietnam	1,904	1,114,809						
Vietnam	Cambodia	N/A	534,891,904	0	549,097,631	0	62,981,557	0	612,079,188
	Lao PDR	N/A	10,675,078						
	Myanmar	N/A	2,037,751						
	Singapore	N/A	6,882						
	Thailand	N/A	1,486,016						

Remarks: N/A refers to Not Available.
The hyphen (-) indicates no country destination's import.
a refers to Thailand's re-export of rice products.

Table 14. FOB prices of rice in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Not specified	2025	0	0	0	0	0	0	3,221	0	1,992	1,903	3,251	0	2,592
		2026	0	1,696	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,696
Lao PDR	Mix Milled rice	2025	473	501	443	498	524	507	450	412	489	465	504	493	480
	quality 1	2026	460	456	487	506	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	477
Malaysia	HS code 1006209000	2025	963	0	0	1,152	1,317	1,183	1,073	0	1,074	0	1,143	1,079	1,123
		2026	1,103	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,103
	HS code 1006304000	2025	0	0	0	0	0	0	0	0	0	0	0	0	0
		2026	0	2,945	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,945
	HS code 1006303000	2025	0	0	626	708	679	0	0	0	0	0	596	712	664
		2026	545	1,699	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,122
	HS code 1006305000	2025	0	0	0	0	0	0	0	0	0	0	9,688	0	9,688
		2026	0	2,945	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,945
	HS code 1006307000	2025	0	0	0	0	0	0	0	0	0	0	0	0	0
		2026	0	1,842	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,842
	HS code 1006309100	2025	364	0	0	0	0	0	0	0	0	0	0	0	364
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0
	HS code 1006309900	2025	526	611	629	565	484	438	447	443	438	448	448	405	490
		2026	423	412	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	418
Myanmar	Not specified	2025	473	469	437	409	475	354	373	374	350	310	304	316	387
		2026	300	319	314	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	311
Thailand	Thailand Hommali	2025	943	947	984	1,000	1,074	1,093	1,056	1,059	1,098	1,088	1,024	1,139	1,042
	Rice 100%	2026	1,170	1,167	1,144	1,188	1,212	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,176

Remarks: N/A refers to Not Available.

Table 14. FOB prices of rice in selected ASEAN countries (continued).

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Thailand	White Rice 5%	2025	478	437	422	416	431	414	391	375	371	354	368	424	407
		2026	408	409	382	410	428	N/A	N/A	N/A	N/A	N/A	N/A	N/A	407
Vietnam	Not specified	2025	593	514	492	501	526	527	483	503	498	522	508	476	512
		2026	476	458	475	464	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	468

Remarks: N/A refers to Not Available.

Table 15. CIF prices of rice in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Not specified	2025	530	33,000	0	0	36,000	0	0	632	619	597	580	581	9,067
		2026	2,593	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,593
Lao PDR	Mix Milled rice quality 1	2025	381	420	412	422	452	455	473	564	517	423	364	405	441
		2026	378	472	419	437	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	427
Malaysia	HS code 1006101000	2025	1,552	0	0	0	0	0	0	0	0	0	2,391	0	1,972
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	HS code 1006209000	2025	0	0	0	0	0	0	515	0	0	0	0	0	515
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	HS code 1006303000	2025	761	636	613	633	631	643	617	618	661	724	815	591	662
		2026	592	628	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	610
	HS code 1006304000	2025	1,285	1,012	1,296	0	0	1,060	0	1,299	1,267	1,311	1,406	1,325	1,251
		2026	1,584	868	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,226
	HS code 1006305000	2025	939	858	843	880	776	829	797	824	828	797	795	808	831
		2026	838	802	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	820
	HS code 1006307000	2025	854	785	708	764	676	622	654	671	680	689	674	693	706
		2026	712	673	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	692

Remarks: N/A refers to Not Available.

Table 15. CIF prices of rice in selected ASEAN countries (continued).

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Malaysia	HS code 1006309100	2025	556	837	792	854	0	0	582	651	0	0	0	623	699
		2026	818	780	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	799
	HS code 1006309900	2025	536	541	504	528	491	463	465	478	430	411	414	400	472
		2026	391	398	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	394
	HS code 1006409900	2025	477	379	0	414	0	0	0	0	0	0	338	0	402
		2026	0	474	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	474
Singapore	Not specified	2025	701	633	699	609	573	579	665	652	625	594	708	684	644
		2026	743	759	632	645	671	665	688	693	677	682	580	597	669

Remarks: N/A refers to Not Available

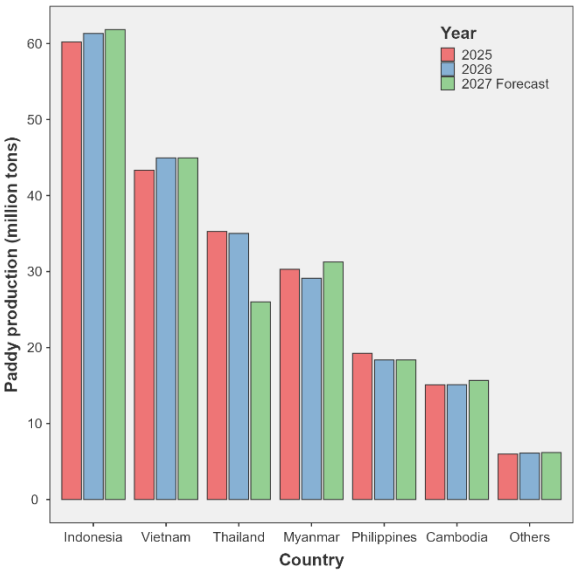


Figure 1. Paddy production of selected countries in ASEAN from 2025 to 2027.

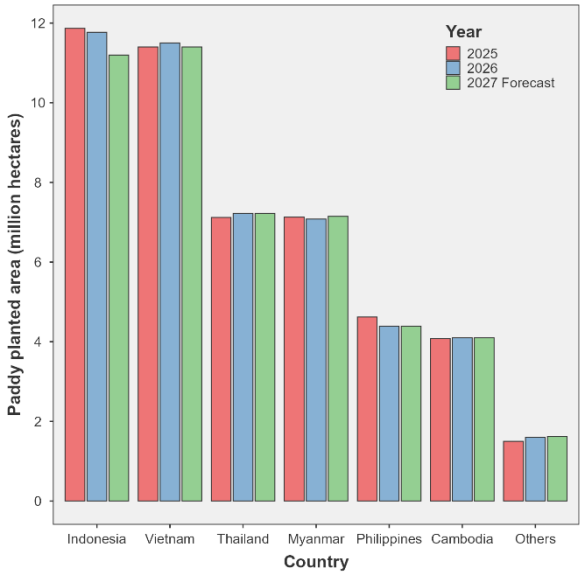


Figure 2. Paddy planted area of selected countries in ASEAN from 2025 to 2027.

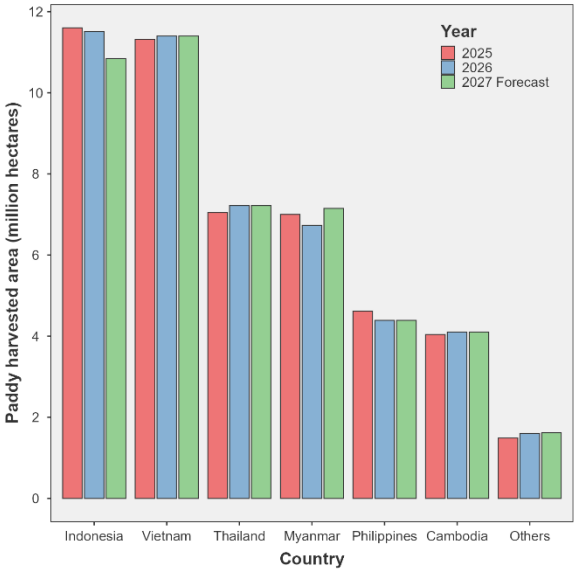


Figure 3. Paddy harvested area of selected countries in ASEAN from 2025 to 2027.

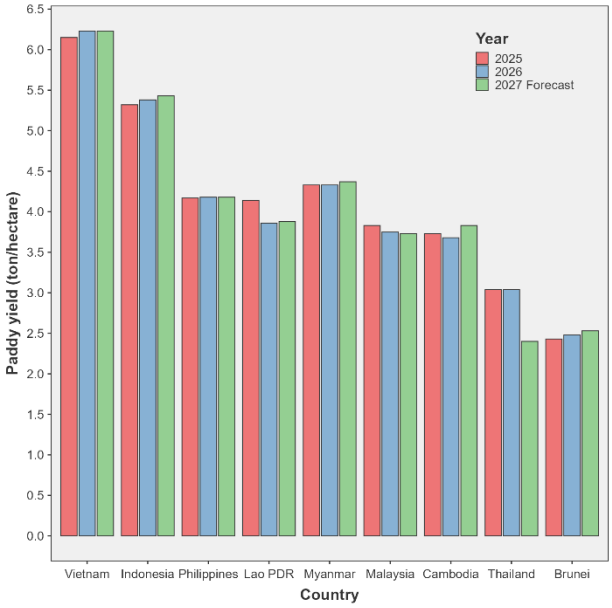


Figure 4. Paddy yield of selected countries in ASEAN from 2025 to 2027.

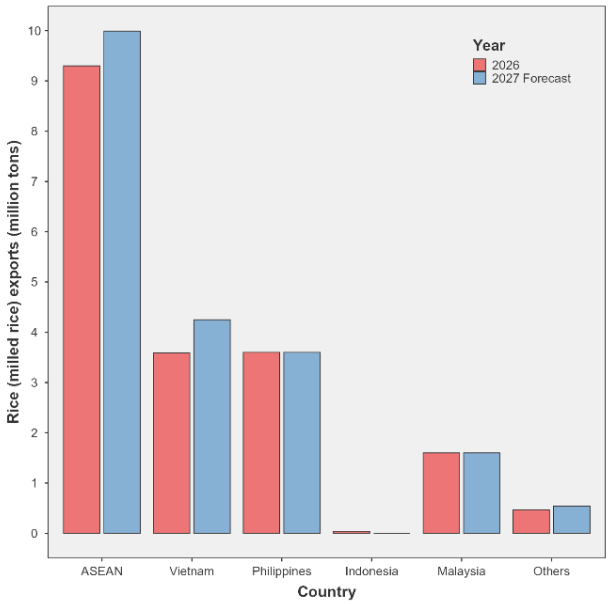


Figure 5. Amount of rice exports of selected countries in ASEAN from 2026 to 2027.

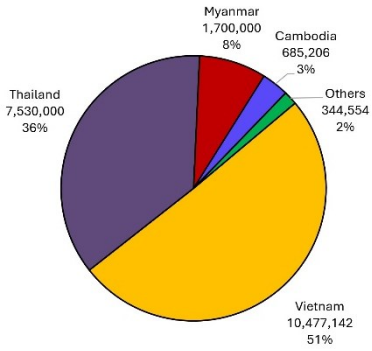


Figure 6. Share of rice exports (tons) among ASEAN countries in 2026, totaling 20.74 million tons.

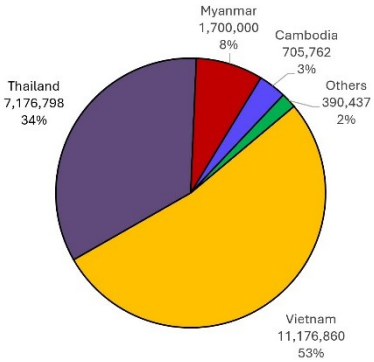


Figure 7. Share of rice exports (tons) among ASEAN countries in 2027, totaling 21.15 million tons.

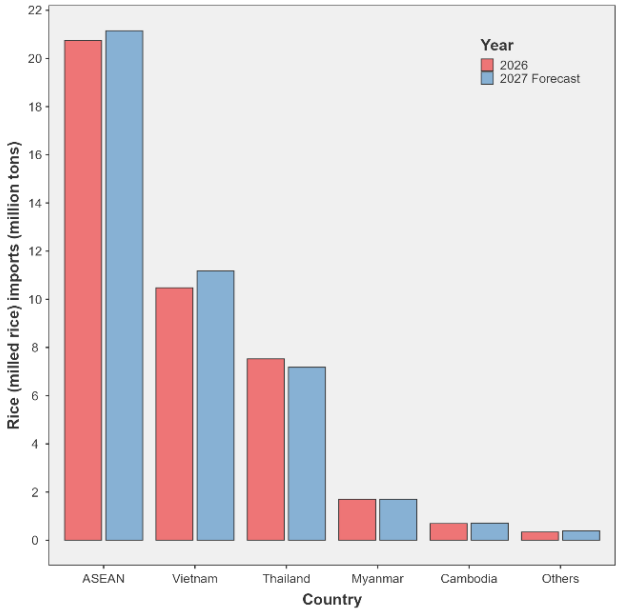


Figure 8. Amount of rice imports of selected countries in ASEAN from 2026 to 2027.

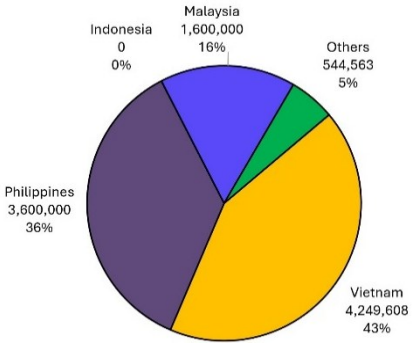


Figure 9. Share of rice imports (tons) among ASEAN countries in 2026, totaling 9.30 million tons.

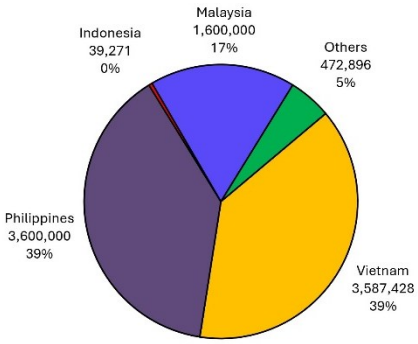


Figure 10. Share of rice imports (tons) among ASEAN countries in 2027, totaling 9.99 million tons.

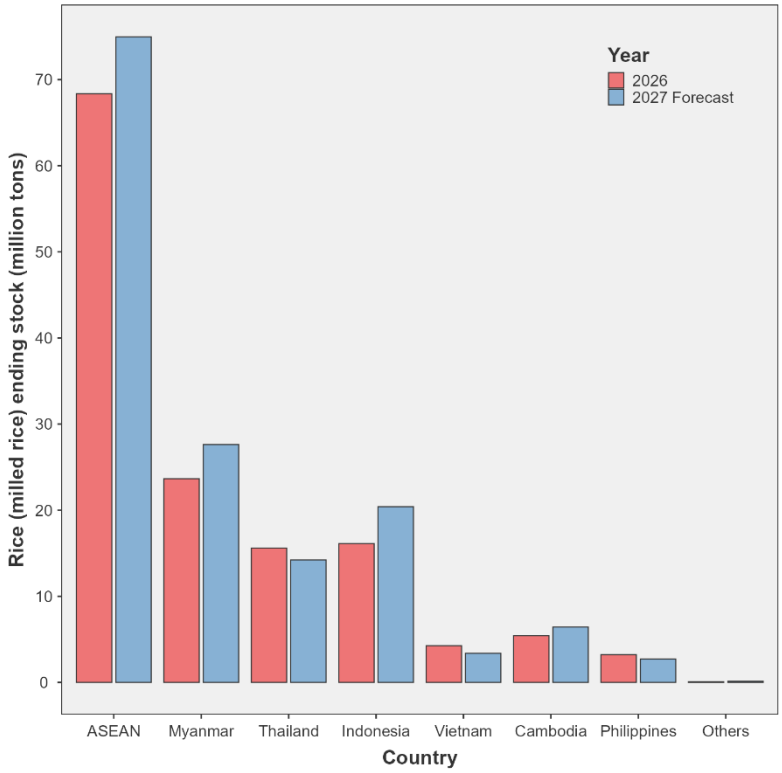


Figure 11. Amount of ending stock of rice in ASEAN from 2026 to 2027.

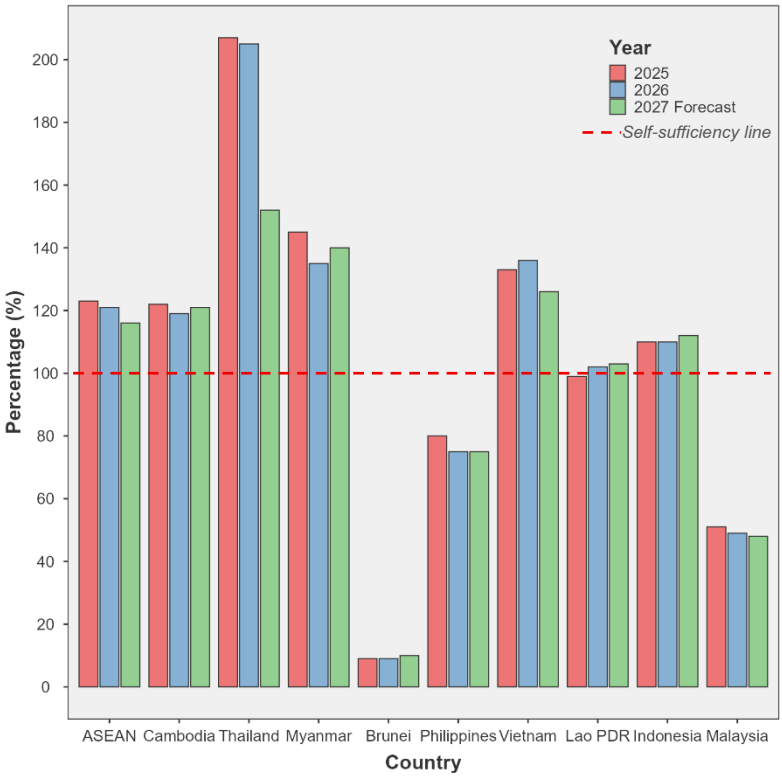


Figure 12. Ratio of rice production to domestic utilization in ASEAN from 2025 to 2027.

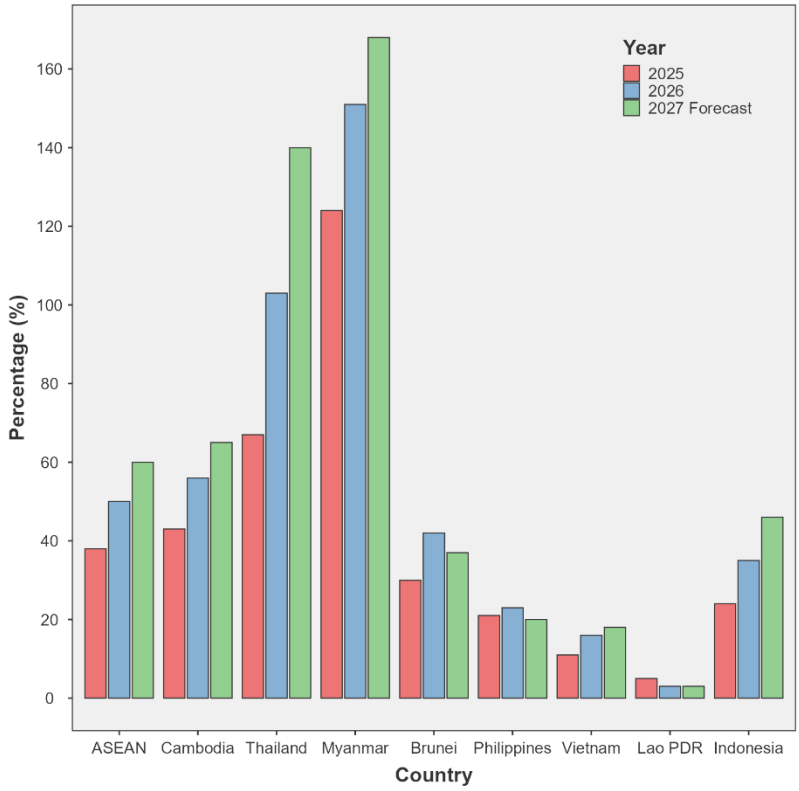


Figure 13. Ratio of rice beginning stock to domestic utilization in ASEAN from 2025 to 2027.

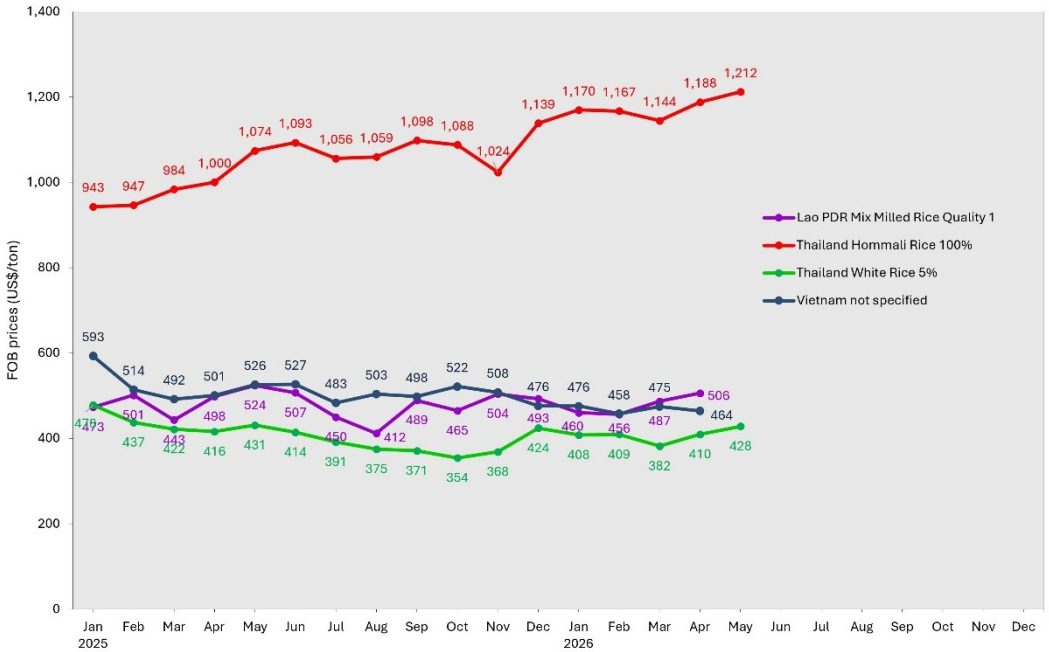


Figure 14. FOB prices (US$/ton) of milled rice of selected countries in ASEAN from 2025 to 2026.

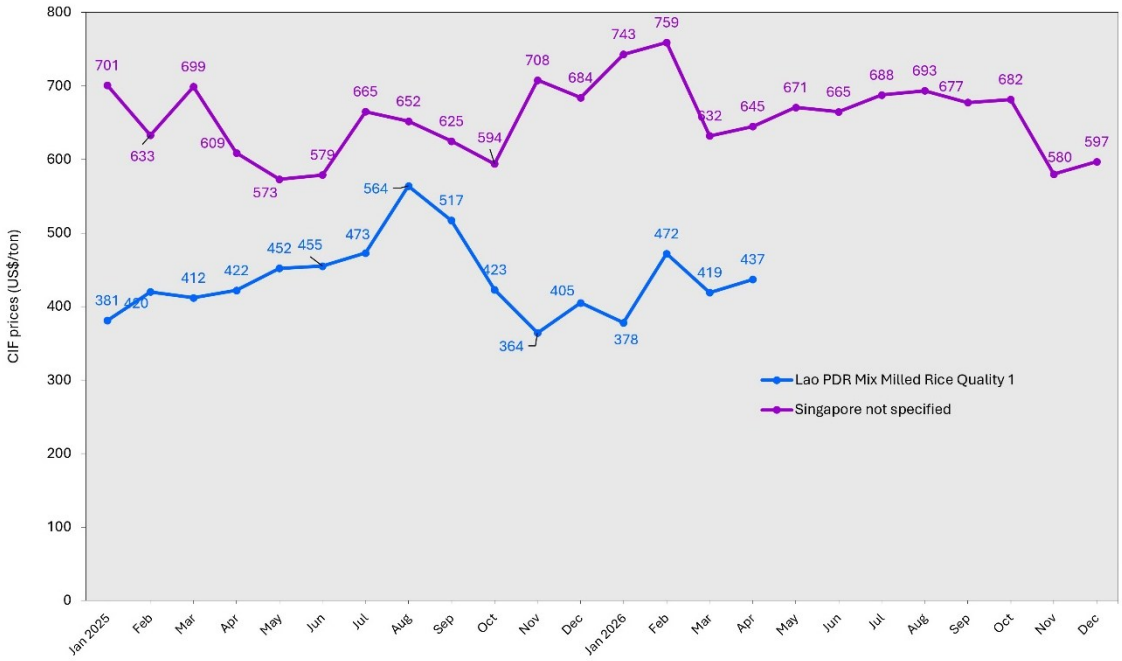


Figure 15. CIF prices (US$/ton) of milled rice of selected countries in ASEAN from 2025 to 2026.

Highlights of Maize Outlook for 2027

The increase in ASEAN maize supply in 2027 is due to the increase in the beginning stock, import, and production. The supply is forecast to increase by 2.00 million tons (2.82 percent increases) from 70.83 million tons in 2026 to approximately 72.83 million tons in 2027 (Table 16). The forecast indicates that the beginning stock increases by approximately 0.72 million tons (6.82 percent increases) from 10.55 million tons in 2026 to 11.27 million tons in 2027. The import is expected to increase by 1.14 million tons (5.35 percent increases) from 21.31 million tons in 2026 to 22.45 million tons in 2027. The production is expected to increase by 0.15 million tons (0.38 percent increases) from 38.97 million tons in 2026 to 39.12 million tons in 2027.

The demand for maize in 2027 is expected to increase, attributing in the ending stock, export, and domestic utilization. Accordingly, the ending stock is expected to increase by 1.02 million tons (9.05 percent increases) from 11.27 million tons in 2026 to 12.29 million tons in 2027. The export is increased by 0.22 million tons (9.73 percent increases) from 2.26 million tons in 2026 to 2.48 million tons in 2027. The domestic utilization is predicted to rise by 0.76 million tons (1.33 percent increases) from 57.30 million tons in 2026 to 58.06 million tons in 2027.

The ratio of production to domestic utilization (self-sufficiency ratio) for the region is expected to slightly decrease by 0.65 percent from 68.02 percent in 2026 to 67.37 percent in 2027. The beginning stock to domestic utilization ratio, referred to as the food security ratio, is expected to increase by 0.99 percent from 18.42 percent in 2026 to 19.41 percent in 2027.

Table 16. Summary of the ASEAN maize situation from 2026 to 2027

Unit: Million tons

Items	2026	2027	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	70.83	72.83	2.00	2.82
Beginning stock	10.55	11.27	0.72	6.82
Production	38.97	39.12	0.15	0.38
Import	21.31	22.45	1.14	5.35
Demand (Million tons)	70.83	72.83	2.00	2.82
Domestic utilization	57.30	58.06	0.76	1.33
Export	2.26	2.48	0.22	9.73
Ending stock	11.27	12.29	1.02	9.05
Ratio of production to domestic utilization (%)	68.02	67.37	-	-
Ratio of beginning stock to domestic utilization (%)	18.42	19.41	-	-

ASEAN Maize Situation in 2026

Production

ASEAN maize production in 2026 (crop year 2025/2026) is at 43.04 million tons, increasing 1.02 million tons (2.44 percent increases) from 42.02 million tons in 2025 (crop year 2024/2025). Increases in maize production in 2026 are observed in Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Thailand, and Vietnam due to expansions in the planted areas and yield. Meanwhile, decreases in maize production are observed in Brunei Darussalam and Cambodia due to reductions in yield, (Tables 17–20, Figures 16–19).

For Brunei Darussalam in 2026, the decrease of production is attributed to a decrease in yield due to a major company shifting its production from sweet corn to other crops.

For Indonesia in 2026, the increase in maize production is attributed to expansions in both the planted area and yield. These improvements are driven by favorable weather conditions, higher maize prices, supportive government policies, improved crop management through collaboration with farmers, and increased fertilizer application. However, some planted areas during the first cropping season were adversely affected by the ongoing recovery of agricultural land following flooding that occurred at the end of 2025. In addition, the third cropping season was affected by floods, pest infestations, and unfavorable weather conditions in some areas. Despite these localized challenges, overall maize production is expected to increase in 2026.

For Lao PDR in 2026, the increase in maize production is attributed to an expansion in the planted area, driven by higher maize prices, lower prices of competing crops, and supportive government policies. Meanwhile, the decline in yield is mainly due to fertilizer shortages and limited input use during both the wet and dry seasons.

For Malaysia in 2026, the increase in production is attributed to expansions in both planted area and yield.

For Myanmar in 2026, the increase in maize production is attributed to an expansion in the planted area. The increase in planted area is driven by declining prices of competing crops, encouraging farmers to expand maize cultivation. Meanwhile, the slight decline in yield is mainly attributed to fertilizer shortages and the impacts of natural disasters, particularly flooding during the wet season.

For the Philippines in 2026, the increase in maize production is primarily attributed to higher yields. Yield improvements during the wet season are driven by increased fertilizer application by farmers and adequate soil moisture. During the dry season, favorable weather conditions, the adoption of improved maize varieties, and increased fertilizer use further support productivity. However, despite these positive factors, the overall harvested area is expected to decline.

For Thailand in 2026, the increase in maize production is primarily attributed to an expansion in the planted area. The expansion is driven by higher maize prices and lower prices of competing crops during the wet season. During the dry season, lower rainfall is expected to reduce reservoir water levels, creating conditions that are more favorable for maize cultivation than for rice production, thereby encouraging farmers to expand the planted area. Meanwhile, the overall maize yield is expected to decline

due to anticipated drought conditions. Rainfall in 2026 is forecast to be lower than in the previous year, while temperatures are expected to be higher, which may adversely affect crop growth and kernel development. In addition, during the rainy season (May to October), rainfall is projected to be approximately 10 percent below the long-term average, with a tendency for dry spells from late June to early July. These conditions may lead to water shortages for agriculture, particularly in drought-prone areas outside irrigation systems.

For Vietnam in 2026, the increase in maize production is primarily attributed to higher yields. Yield improvements are driven by favorable weather conditions and improved crop management practices adopted by farmers. Meanwhile, the reduction in the planted area is mainly due to lower maize prices, particularly during the first cropping season.

Utilization and Stock

The maize utilization in ASEAN in 2026 is at 57.30 million tons, increasing 3.65 million tons (6.80 percent increases) compared to 53.65 million tons in 2025 (Tables 22–23). Increases in domestic utilization are observed in Brunei Darussalam, Cambodia, Indonesia, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam, despite decreases in Lao PDR.

The beginning stock of maize in ASEAN in 2026 is at 10.55 million tons, increasing 1.78 million tons (20.34 percent increases) from 8.77 million tons in 2025 (Tables 22–23).

The ratio of maize production to domestic utilization for the entire ASEAN region in 2026 is at 68.02 percent, showing a decrease from 71.27 percent in 2025 (Table 25, Figure 27).

This suggests that ASEAN as a whole produced less maize than required for regional consumption. On a country-by-country basis, Cambodia, Lao PDR, and Myanmar have ratios above 100 percent, indicating that they produced more maize than needed for their domestic consumption. On the other hand, Brunei Darussalam, Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam have ratios below 100 percent, implying that these countries still needed to import maize to meet their domestic utilization needs.

The ratio of beginning stock to domestic utilization (food security ratio) for the ASEAN increases to 18.42 percent in 2026 from 16.34 percent in 2025 (Table 26, Figure 28).

Trade

In 2026, ASEAN exports 2.26 million tons of maize while importing 21.31 million tons (Table 23, Figures 20–21 and 23–24). Myanmar, the largest exporter in ASEAN, is contributed 61.84 percent of the total maize exports, amounting to 1.40 million tons (Table 23, Figures 20–21).

The primary importing countries in the region include Vietnam, Thailand, and the Philippines (AFSIS estimated), respectively (Table 23, Figures 23–24).

Detailed information regarding the quantity and value of maize exports by destination countries and the quantity and value of maize imports by origin countries could be found in Tables 27–28.

Prices

The monthly FOB prices for maize exporting countries and CIF prices for importing

countries for 2025 and 2026 are shown in Tables 29–30 and Figures 29–30. Singapore is the highest CIF price, with the annual average CIF price in 2026 is estimated at 1,094 US$ per ton. The annual average FOB price for Indonesia in 2026 is 925 US$ per ton (January-March) according to HS code 10059091 and 2,598 US$ per ton (January-March) according to HS-code 100590999.

Damage Area

The damaged area of maize in 2026 is to be 12,125 hectares. Of this, 4,930 hectares are caused by drought. Unspecified types of damages are observed in Cambodia and Indonesia in a total of 5,676 hectares (Table 21).

Prospects for Maize in 2027

Production

Maize production in ASEAN in 2027 (crop year 2026/2027) is estimated at 43.47 million tons, up from 43.04 million tons in 2026. Increases are almost observed in all ASEAN countries except Thailand. The largest increase in terms of quantity is recorded in Indonesia, with production rising to approximately 23.34 million tons in 2027 from 22.68 million tons in 2026 (Table 17).

For Brunei Darussalam in 2027, the production is expected to increase, influenced by favorable weather conditions, fertilizer sufficiency, and improving crop management.

For Indonesia in 2027, the production is expected to increase, driven by expansions in both the planted area and yield. These improvements are expected to be particularly supported during the first cropping season, contributing to higher overall production. The increases are supported by higher maize prices, favorable weather conditions, supportive government policies, the adoption of high-yielding maize varieties through collaboration with farmers, adequate fertilizer availability, and improved crop management practices. However, the planted area is expected to decline during the second and third cropping seasons due to lower maize prices and increased competition from other food crops and horticultural commodities.

For Lao PDR in 2027, the production is expected to increase, primarily driven by higher yields. Favorable weather conditions, including adequate water availability and sunlight, together with supportive government policies, are expected to support the expansion of the planted area, particularly during the dry season. However, labor shortages during the wet season may contribute to a reduction in the planted area. Meanwhile, maize yields are expected to increase across the country, supported by adequate water availability and sunlight, as well as farmers' adoption of high-yielding maize varieties.

For Thailand in 2027, maize production is expected to decrease, mainly due to lower yields. The planted area is expected to increase, driven by higher maize prices and lower prices of competing crops during the wet season. During the dry season, below-normal rainfall is expected to reduce reservoir water levels, creating conditions that are more favorable for maize cultivation than for rice production, thereby encouraging an expansion in the planted area. However, maize yields are expected to decline as drought conditions during the wet season are likely to adversely affect crop growth and productivity. Although farmers are expected to adopt improved crop management practices during the dry season, these improvements may not fully offset the negative impacts of drought on overall production.

For Vietnam in 2027, maize production is expected to remain stable, with no significant changes in either the planted area or yield compared with the previous year.

Utilization and Stock

The domestic utilization of maize in ASEAN is estimated to be 58.06 million tons in 2027, up from 57.30 million tons in 2026 (Tables 23–24). The forecast for beginning stock for 2027 is 11.27 million tons, which is an increase of 0.72 million tons from 10.55 million tons in 2026.

The ratio of production to domestic utilization (self-sufficiency ratio) is expected to decrease to 67.37 percent in 2027, down from 68.02 percent in 2026 (Table 25, Figure 27). Meanwhile, *the ratio of beginning stock to domestic utilization (food security ratio)* is expected to be 19.41 percent in 2027, an increase from 18.42 percent in 2026 (Table 26, Figure 28).

Trade

The maize export from ASEAN is expected to increase to 2.48 million tons in 2027, up from 2.26 million tons in 2026. The forecast for maize imports by ASEAN in 2027 is 22.45 million tons, an increase from 21.31 million tons in 2026 (Tables 23–24, Figures 20, 22–23, and 25).

Summary

ASEAN maize production is expected to continue increasing in 2026 and 2027, mainly due to expansions in planted area and improvements in yield in several member countries. However, regional maize utilization is projected to grow at a faster pace than production, resulting in a decline in the self-sufficiency ratio (SSR) and continued dependence on imports, particularly in major consuming countries such as Vietnam, Thailand, and the Philippines. Although the increase in beginning stocks is expected to improve the food security ratio (FSR), ASEAN remains vulnerable to supply disruptions because domestic production is insufficient to meet growing demand. This situation is consistent with the global maize outlook, where consumption is projected to exceed production, leading to tighter global ending stocks despite relatively adequate overall supplies [6,7].

Globally, maize production in 2026/27 is forecast to decline slightly from the previous record year, mainly due to lower production in the United States and Argentina, although larger harvests in Brazil and China partially offset these reductions [6]. Consequently, global maize stocks are expected to decrease while demand for feed, food, and industrial use continues to expand, creating a tighter global market environment [6,7]. The USDA July update further reduced global maize production and ending stocks, indicating that the global supply cushion is becoming narrower than previously expected [8].

The outlook also suggests that climate variability remains one of the major production risks. In ASEAN, drought, floods, pest outbreaks, and fertilizer shortages continue to constrain maize yields in several countries, particularly Thailand, where drought is expected to reduce productivity despite an expansion in planted area. Similar concerns are observed globally, where adverse weather conditions, high fertilizer costs, and geopolitical uncertainties are expected to limit production growth and increase market volatility during the 2026/27 season [7,9].

Furthermore, the global grain market is entering a transitional period in which inventories remain sufficient in the short term but are gradually tightening as demand continues to outpace production. Several market analyses indicate that while current supplies are adequate, weather-related risks, shrinking exportable supplies, and uncertainty in major producing countries could increase price volatility and tighten grain availability toward 2027 [7,8]. For ASEAN, this trend highlights the importance of strengthening regional maize production

and productivity, as increasing reliance on imports may expose importing countries to higher international prices and supply disruptions under a tightening global market.

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Table 17. Maize production in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**42,016.78**	**43,041.64**	**1,024.85**	**2.44**	**43,470.22**	**428.58**	**1.00**
Brunei	0.65	0.64	-0.02	-2.60	0.66	0.02	3.14
Cambodia	1,364.00	1,313.25*	-50.75	-3.72	1,348.83*	35.59	2.71
Indonesia	21,858.81	22,679.81	821.00	3.76	23,342.11	662.31	2.92
Lao PDR	520.32	543.70	23.38	4.49	546.00	2.30	0.42
Malaysia	2.70	2.98*	0.28	10.49	3.18*	0.20	6.60
Myanmar	2,465.43	2,494.56	29.13	1.18	2,520.90	26.34	1.06
Philippines	6,364.65*	6,389.36*	24.71	0.39	6,500.00*	110.64	1.73
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	5,026.00	5,174.45	148.45	2.95	4,765.64	-408.81	-7.90
Vietnam	4,414.23	4,442.90	28.67	0.65	4,442.90	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 18. Maize planted area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**7,013.46**	**7,088.85**	**75.40**	**1.08**	**7,118.57**	**29.72**	**0.42**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	223.00	223.00*	0.00	0.00	225.00*	2.00	0.90
Indonesia	2,714.59	2,789.51	74.93	2.76	2,790.56	1.04	0.04
Lao PDR	104.25	112.85	8.60	8.25	109.55	-3.30	-2.92
Malaysia	0.69	0.72*	0.03	4.17	0.76*	0.04	5.56
Myanmar	627.87	631.83	3.96	0.63	636.28	4.45	0.70
Philippines	1,474.26*	1,444.13*	-30.13	-2.04	1,450.00*	5.87	0.41
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1,003.54	1,035.69	32.14	3.20	1,055.29	19.61	1.89
Vietnam	865.26	851.13	-14.13	-1.63	851.13	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 19. Maize harvested area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**6,993.20**	**7,082.23**	**89.04**	**1.27**	**7,099.17**	**16.94**	**0.24**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	218.00	223.00*	5.00	2.29	225.00*	2.00	0.90
Indonesia	2,710.46	2,789.37	78.91	2.91	2,790.56	1.19	0.04
Lao PDR	104.22	112.85	8.63	8.28	109.55	-3.30	-2.92
Malaysia	0.66	0.72*	0.06	9.39	0.76*	0.04	5.56
Myanmar	621.76	630.28	8.52	1.37	636.28	6.00	0.95
Philippines	1,474.26*	1,444.13*	-30.13	-2.04	1,450.00*	5.87	0.41
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	998.58	1,030.76	32.18	3.22	1,035.90	5.14	0.50
Vietnam	865.26	851.13	-14.13	-1.63	851.13	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 20. Maize yield in ASEAN countries from 2025 to 2027.

Unit: ton/hectare

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**6.01**	**6.08**	**0.07**	**1.16**	**6.12**	**0.04**	**0.66**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	6.26	5.89[b]	-0.37	-5.91	5.99*	0.10	1.70
Indonesia	8.06	8.13	0.07	0.87	8.36	0.23	2.83
Lao PDR	4.99	4.82	-0.17	-3.41	4.98	0.16	3.32
Malaysia	4.10	4.14*	0.04	0.98	4.18*	0.04	0.97
Myanmar	3.97	3.96	-0.01	-0.25	3.96	0.00	0.00
Philippines	4.32*	4.42*	0.10	2.31	4.48*	0.06	1.36
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	5.03	5.02	-0.01	-0.20	4.60	-0.42	-8.37
Vietnam	5.10	5.22	0.12	2.35	5.22	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 21. Maize damaged area in ASEAN countries by cause of damage in 2026.

Unit: hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	**1,546**	**4,930**	**0**	**0**	**5,676**	**0**	**12,152**
Brunei	0	0	0	0	0	0	0
Cambodia	0	0	0	0	5,532	0	5,532
Indonesia	0	0	0	0	144	0	144
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0
Myanmar	1,546	0	0	0	0	0	1,546
Philippines	0	0	0	0	0	0	0
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	0	4,930	0	0	0	0	4,930
Vietnam	0	0	0	0	0	0	0

Remarks: N/P refers to Not Planting.

Table 22. Maize balance sheet of ASEAN countries in 2025.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**8,768,374**	**38,236,058**	**19,542,713**	**66,547,145**	**53,649,007**	**2,346,534**	**10,551,604**	**66,547,145**
Brunei	0	653	394	1,047	1,047	0	0	1,047
Cambodia	1,594,486*	1,364,000	N/A	2,958,486*	692,998*	71,548*	2,193,939*	2,958,486
Indonesia	3,579,102	16,142,730	888,187	20,610,019	15,940,651	7,496	4,661,873	20,610,019
Lao PDR	40,002	520,320	17,246	577,568	313,865	254,786	8,917	577,568
Malaysia	0	2,698	878,129	880,827	877,850*	2,977	0	880,827
Myanmar	1,877,607	2,465,429	5,005	4,348,042	831,835	1,383,043	2,133,164	4,348,042
Philippines	786,626*	8,300,000*	1,850,000*	10,936,626	10,150,000*	0	786,626	10,936,626
Singapore	0	N/P	1,728	1,728	1,652	76	0	1,728
Thailand	144,113	5,025,997	3,900,000	9,070,110	8,973,453	1,240	95,417	9,070,110
Vietnam	746,438	4,414,230	12,002,024	17,162,692	15,865,656	625,368	671,668	17,162,692

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 23. Maize balance sheet of ASEAN countries in 2026

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**10,551,604**	**38,971,510**	**21,306,775**	**70,829,888**	**57,296,670**	**2,264,003**	**11,269,215**	**70,829,888**
Brunei	0	636	414	1,050	1,050	0	0	1,050
Cambodia	2,193,939*	1,313,247*	N/A	3,507,186	739,103*	75,055*	2,693,029*	3,507,186
Indonesia	4,661,873	16,749,038	1,067,271	22,478,182	17,990,472	1,327	4,486,382	22,478,182
Lao PDR	8,917	543,700	17,230	569,847	309,500	255,678	4,669	569,847
Malaysia	0	2,981*	880,000*	882,981	879,277*	3,704	0	882,981
Myanmar	2,133,164	2,494,559	1,114	4,628,837	836,928	1,400,000*	2,391,909	4,628,837
Philippines	786,626*	8,250,000*	2,000,000*	11,036,626	10,300,000*	0	736,626	11,036,626
Singapore	0	N/P	2,146	2,146	2,102	44	0	2,146
Thailand	95,417	5,174,448	4,000,000	9,269,865	9,262,652	1,240	5,973	9,269,865
Vietnam	671,668	4,442,900	13,338,600	18,453,168	16,975,586	526,955	950,627	18,453,168

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 24. Maize balance sheet of ASEAN countries in 2027.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**11,269,215**	**39,116,254**	**22,448,314**	**72,833,783**	**58,057,857**	**2,484,618**	**12,291,307**	**72,833,783**
Brunei	0	655	433	1,089	1,089	0	0	1,089
Cambodia	2,693,029*	1,348,832*	N/A	4,041,861*	1,050,884*	78,732*	2,912,245*	4,041,861
Indonesia	4,486,382	17,238,151	1,232,966	22,957,499	18,016,986	1,219	4,939,294	22,957,499
Lao PDR	4,669	546,000	17,228	567,897	308,874	254,900	4,123	567,897
Malaysia	0	3,178*	880,000*	883,178	878,568*	4,610*	0	883,178
Myanmar	2,391,909	2,520,897*	2,052*	4,914,858	842,441*	1,400,000*	2,672,417*	4,914,858
Philippines	736,626*	8,250,000*	2,000,000*	10,986,626	10,300,000*	0	686,626	10,986,626
Singapore	0	N/P	1,937	1,937	1,877	60	0	1,937
Thailand	5,973	4,765,640	4,250,000	9,021,613	9,000,000	1,240	20,373	9,021,613
Vietnam	950,627	4,442,900	14,063,698	19,457,225	17,657,138	743,857	1,056,230	19,457,225

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 25. Ratio of maize production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**38,236,057.59**	**53,649,007.02**	**71.27**	**38,971,509.51**	**57,296,670.32**	**68.02**	**39,116,253.74**	**58,057,857.22**	**67.37**
Brunei	653.00	1,047.00	62.37	636.00	1,050.00	60.57	655.48	1,089.00	60.19
Cambodia	1,364,000.00	692,998.29	196.83	1,313,247.00	739,103.05	177.68	1,348,832.25	1,050,883.83	128.35
Indonesia	16,142,730.13	15,940,650.83	101.27	16,749,038.21	17,990,472.47	93.10	17,238,151.19	18,016,985.83	95.68
Lao PDR	520,320.00	313,865.00	165.78	543,700.00	309,500.00	175.67	546,000.00	308,874.00	176.77
Malaysia	2,698.00	877,850.00	0.31	2,981.00	879,277.00	0.34	3,178.00	878,568.00	0.36
Myanmar	2,465,429.46	831,835.00	296.38	2,494,559.30	836,928.00	298.06	2,520,896.82	842,441.37	299.24
Philippines	8,300,000.00	10,150,000.00	81.77	8,250,000.00	10,300,000.00	80.10	8,250,000.00	10,300,000.00	80.10
Singapore	N/P	1,652.00	0.00	N/P	2,102.00	0.00	N/P	1,877.00	0.00
Thailand	5,025,997.00	8,973,452.90	56.01	5,174,448.00	9,262,651.80	55.86	4,765,640.00	9,000,000.00	52.95
Vietnam	4,414,230.00	15,865,656.00	27.82	4,442,900.00	16,975,586.00	26.17	4,442,900.00	17,657,138.19	25.16

Remarks: N/P refers to Not Planting.

Table 26. Ratio of maize beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**8,768,374.10**	**53,649,007.02**	**16.34**	**10,551,603.96**	**57,296,670.32**	**18.42**	**11,269,215.09**	**58,057,857.22**	**19.41**
Brunei	0.00	1,047.00	0.00	0.00	1,050.00	0.00	0.00	1,089.00	0.00
Cambodia	1,594,485.88	692,998.29	230.09	2,193,939.18	739,103.05	296.84	2,693,028.63	1,050,883.83	256.26
Indonesia	3,579,102.00	15,940,650.83	22.45	4,661,872.59	17,990,472.47	25.91	4,486,381.78	18,016,985.83	24.90
Lao PDR	40,002.45	313,865.00	12.75	8,917.45	309,500.00	2.88	4,669.45	308,874.00	1.51
Malaysia	0.00	877,850.00	0.00	0.00	879,277.00	0.00	0.00	878,568.00	0.00
Myanmar	1,877,607.00	831,835.00	225.72	2,133,163.87	836,928.00	254.88	2,391,909.17	842,441.37	283.93
Philippines	786,626.00	10,150,000.00	7.75	786,626.00	10,300,000.00	7.64	736,626.00	10,300,000.00	7.15
Singapore	0.00	1,652.00	0.00	0.00	2,102.00	0.00	0.00	1,877.00	0.00
Thailand	144,113.00	8,973,452.90	1.61	95,417.10	9,262,651.80	1.03	5,973.30	9,000,000.00	0.07
Vietnam	746,437.76	15,865,656.00	4.70	671,667.76	16,975,586.00	3.96	950,626.76	17,657,138.19	5.38

Table 27. Quantity and value of maize exports by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	32	40,396	532	1,098,803	7	7,522	539	1,106,325
	Philippines	0.10	638						
	Singapore	257	229,599						
	Thailand	236	824,250						
	Timor-Leste	7	3,920						
Lao PDR	Thailand	14,558	1,860,812	58,417	11,361,259	11,954	4,183,900	70,371	15,545,159
	Vietnam	43,859	9,500,447						
Malaysia	Indonesia	144	51,261	156	60,792	0	0	156	60,792
	Singapore	12	9,531						
Myanmar	Thailand	300,519	72	497,023	119	0	0	497,023	119
	Vietnam	1,000	0.25						
Philippines	Indonesia	2	11,827	138	647,200	6	3,668	144	650,868
	Vietnam	136	635,373						
Singapore	-	0	0	0	0	0	0	0	0
Thailand	-	0	0	0	0	0	0	0	0
Vietnam	Cambodia	N/A	7,039,146	N/A	43,140,557	N/A	861,512	N/A	44,002,069
	Lao PDR	N/A	1,881,807						
	Philippines	N/A	34,219,604						

Remarks: N/A refers to Not Available.
The hyphen (-) indicates no country destination's export.

Table 28. Quantity and value of maize imports by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Philippines	1	2,377	4	17,839	70,995	18,437,498	70,999	18,455,337
	Thailand	3	15,462						
Lao PDR	Thailand	2,302	706,744	2,800	793,494	5,232	2,735,818	8,032	3,529,312
	Vietnam	498	86,750						
Malaysia	Singapore	3	5,355	48	121,441	33,573	8,981,602	33,621	9,103,043
	Thailand	46	116,086						
Myanmar	Thailand-	514	2	514	2	600	2	1,114	4
Philippines	Indonesia	2	9,448	248,141	68,444,449	546,242	124,948,115	794,383	193,392,564
	Myanmar	194,530	49,540,807						
	Thailand	15	320,194						
	Vietnam	53,594	18,574,000						
Singapore	Indonesia	907	826,987	1,230	1,222,563	916	1,141,786	2,146	2,364,349
	Malaysia	305	348,879						
	Myanmar	0.01	117						
	Thailand	18	46,580						
Thailand	Lao PDR	55,979	14,540,103	320,594	86,391,746	0	0	320,594	86,391,746
	Myanmar	264,616	71,851,643						
Vietnam	Cambodia	5,530	1,284,270	47,480	15,257,296	4,280,931	1,063,533,598	4,328,411	1,078,790,894
	Lao PDR	39,969	9,535,370						
	Myanmar	1,000	250,498						
	Thailand	981	4,187,158						

Remarks: N/A refers to Not Available.

The hyphen (-) indicates no country destination's export.

Table 29. FOB prices of maize in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS code 10059099	2025	529	0	579	0	1,067	279	276	3,662	0	597	0	924	989
		2026	6,452	560	782	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,598
	HS code 10059091	2025	0	835	893	837	934	837	916	919	839	942	1,697	907	960
		2026	944	944	887	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	925
Lao PDR	Grade B	2025	229	253	187	195	194	157	148	159	192	246	335	316	218
		2026	285	252	211	173	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	230
Malaysia	HS code 1005100000	2025	327	434	756	363	0	0	354	329	387	409	333	340	403
		2026	352	386	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	369
	HS code 1103130000	2025	395	383	839	842	856	294	296	312	337	384	315	308	463
		2026	794	794	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	794
Myanmar	Not specified	2025	262	262.2	262	258	255	259	260	260	248	242	239	236	254
		2026	236	237	242	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	238
Thailand	Not specified	2025	318	320	318	316	332	339	318	318	322	303	305	314	319
		2026	319	324	313	337	363	N/A	N/A	N/A	N/A	N/A	N/A	N/A	331

Remarks: N/A refers to Not Available.

Table 30. CIF prices of maize in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS code 10059099	2025	37,000	35,500	31,167	60,000	13,000	44,143	8,500	0	33,852	3,000	6,833	51,000	29,454
		2026	24,000	8,500	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	16,250
	HS code 10059091	2025	0	252	259	250	261	264	258	235	232	235	232	233	246
		2026	250	240	260	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	250
Lao PDR	Not specified	2025	267	387	271	266	363	276	319	264	277	319	258	259	294
		2026	273	215	297	266	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	263
Malaysia	HS code 1005100000	2025	340	265	276	323	302	258	248	221	381	1,218	286	291	367
		2026	890	258	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	574
	HS code 1103130000	2025	486	542	497	511	552	478	434	454	489	449	500	442	486
		2026	508	404	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	456
Myanmar	Not specified	2025	424	410	397	437	367	240	463	141	739	481	345	653	425
		2026	311	336	378	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	342
Singapore	Not specified	2025	1,632	1,701	1,113	1,273	1,357	1,094	971	1,101	1,056	1,703	1,058	1,191	1,271
		2026	1,378	1,039	975	1,044	801	956	1,139	929	1,082	1,400	1,224	1,160	1,094
Vietnam	Not specified	2025	249.7	258.7	266.0	261.9	262.1	260.4	253.7	246.5	233.6	234.9	238.6	242.3	251
		2026	243.8	249.2	250.8	258.2	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	251

Remarks: N/A refers to Not Available.

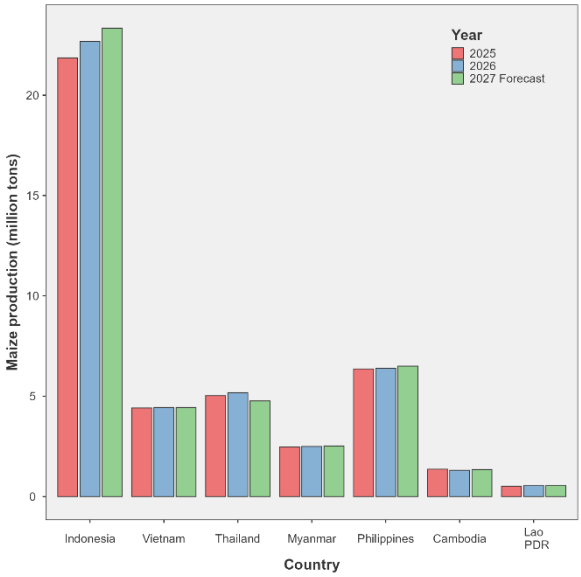


Figure 16. Maize production of selected countries in ASEAN from 2025 to 2027.

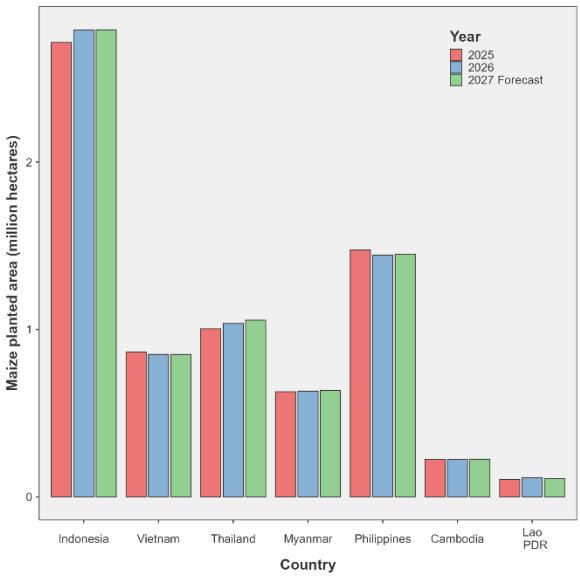


Figure 17. Maize planted area of selected countries in ASEAN from 2025 to 2027.

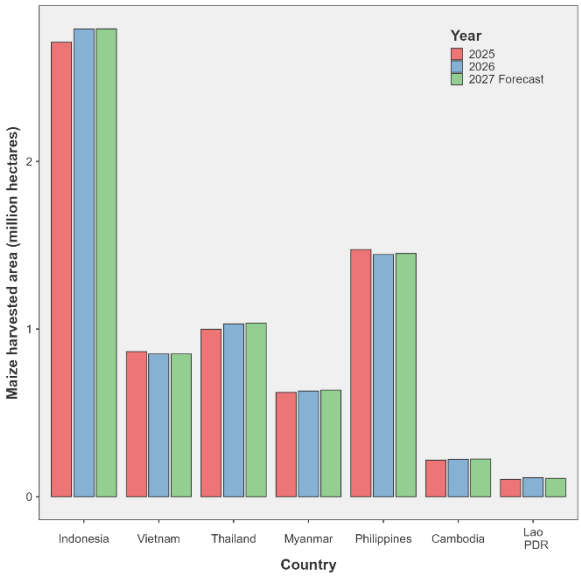


Figure 18. Maize harvested area of selected countries in ASEAN from 2025 to 2027.

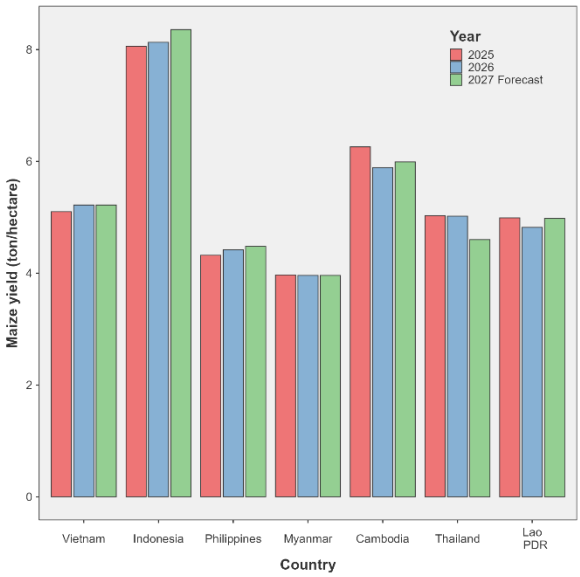


Figure 19. Maize yield of selected countries in ASEAN from 2025 to 2027.

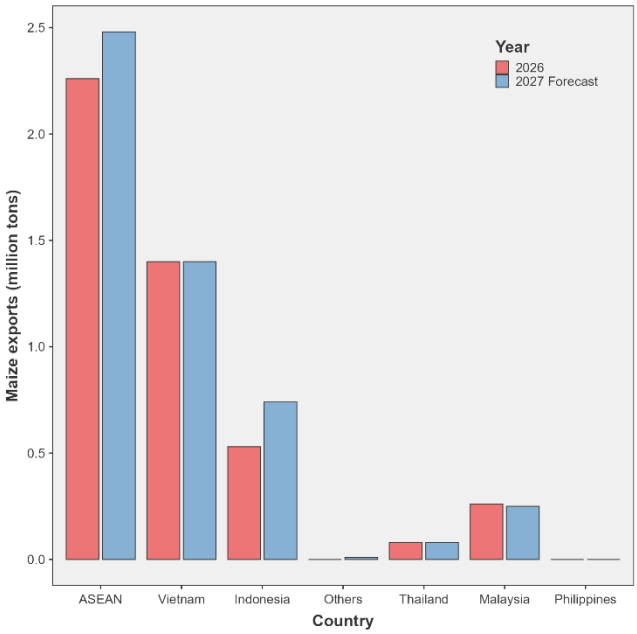


Figure 20. Amount of maize exports of selected countries in ASEAN from 2026 to 2027.

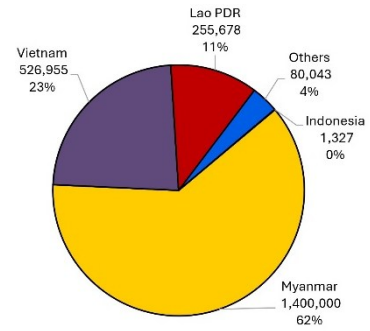


Figure 21. Share of maize exports (tons) among ASEAN countries in 2026, totaling 2.26 million tons.

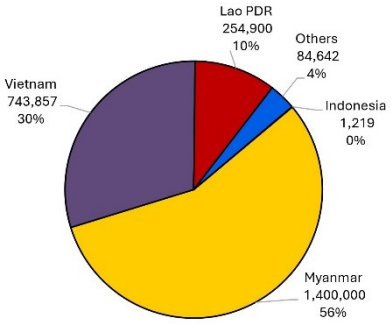


Figure 22. Share of maize exports (tons) among ASEAN countries in 2027, totaling 2.48 million tons.

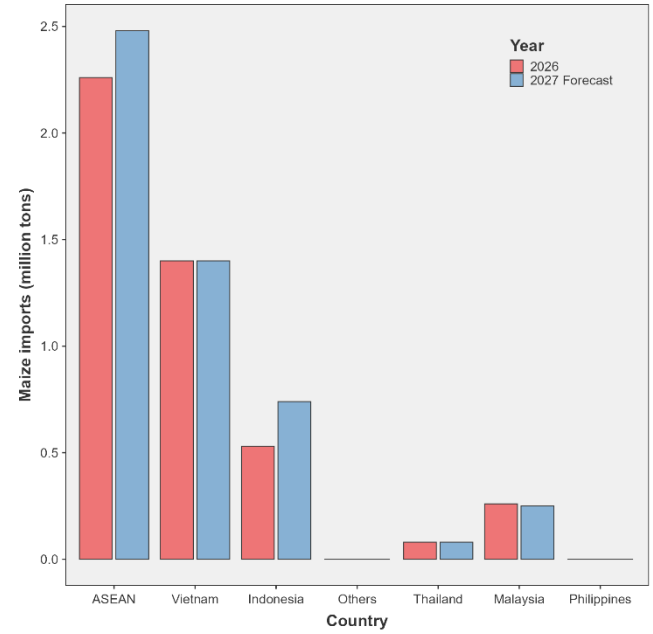


Figure 23. Amount of maize imports of selected countries in ASEAN from 2026 to 2027.

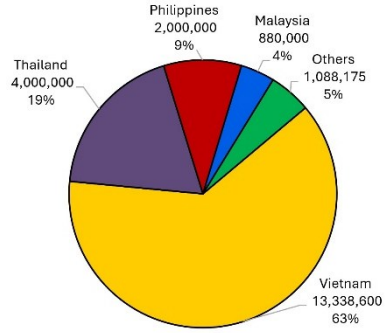


Figure 24. Share of maize imports (tons) among ASEAN countries in 2026, totaling 21.31 million tons.

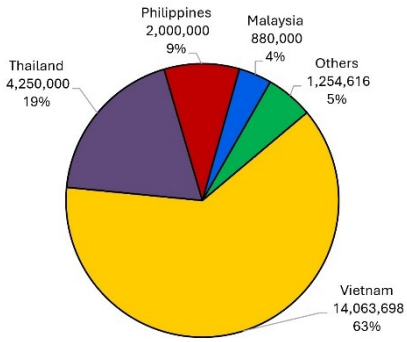


Figure 25. Share of maize imports (tons) among ASEAN countries in 2027, totaling 22.45 million tons.

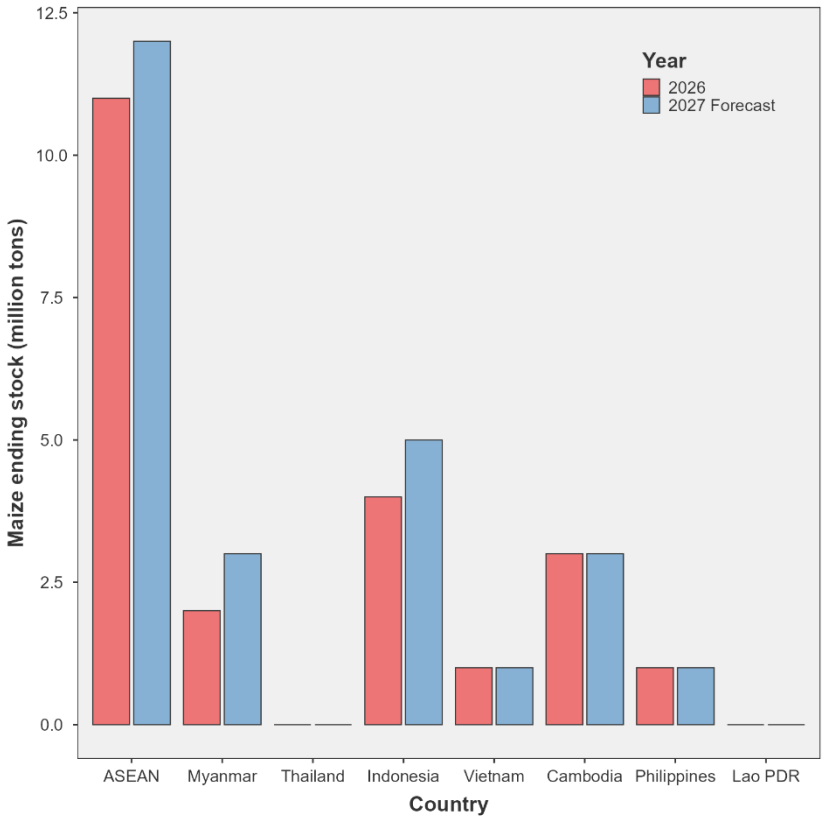


Figure 26. Amount of ending stock of maize in ASEAN from 2026 to 2027.

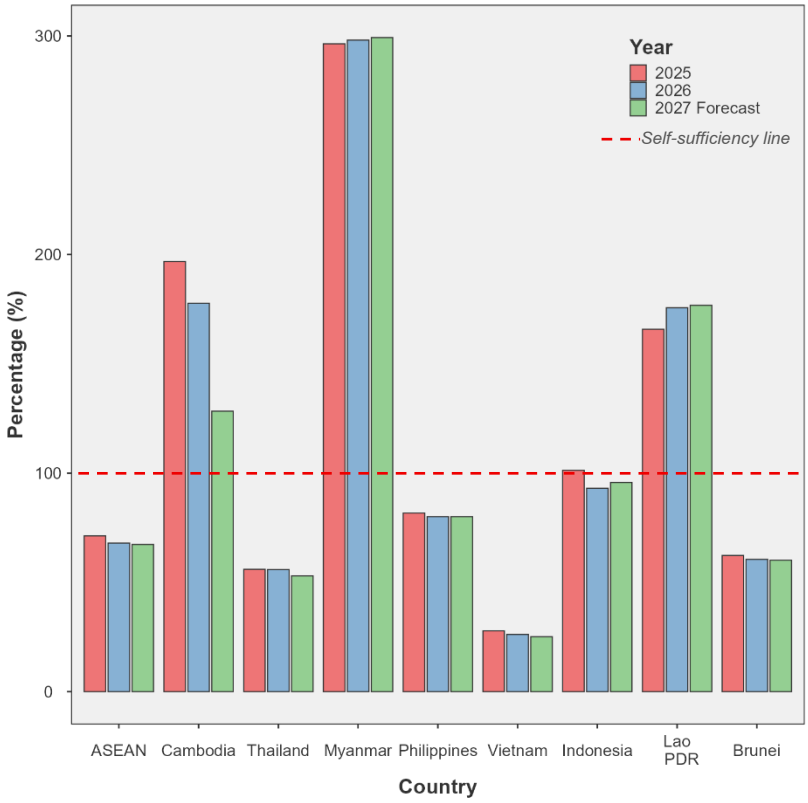


Figure 27. Ratio of maize production to domestic utilization in ASEAN from 2025 to 2027.

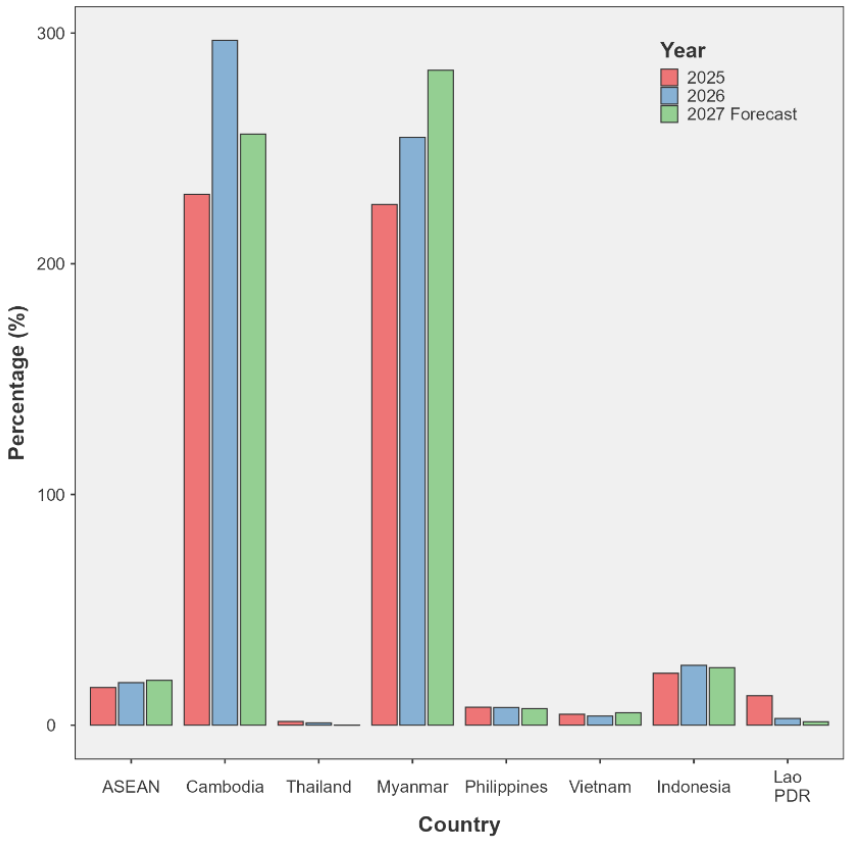


Figure 28. Ratio of maize beginning stock to domestic utilization in ASEAN from2025 to 2027.

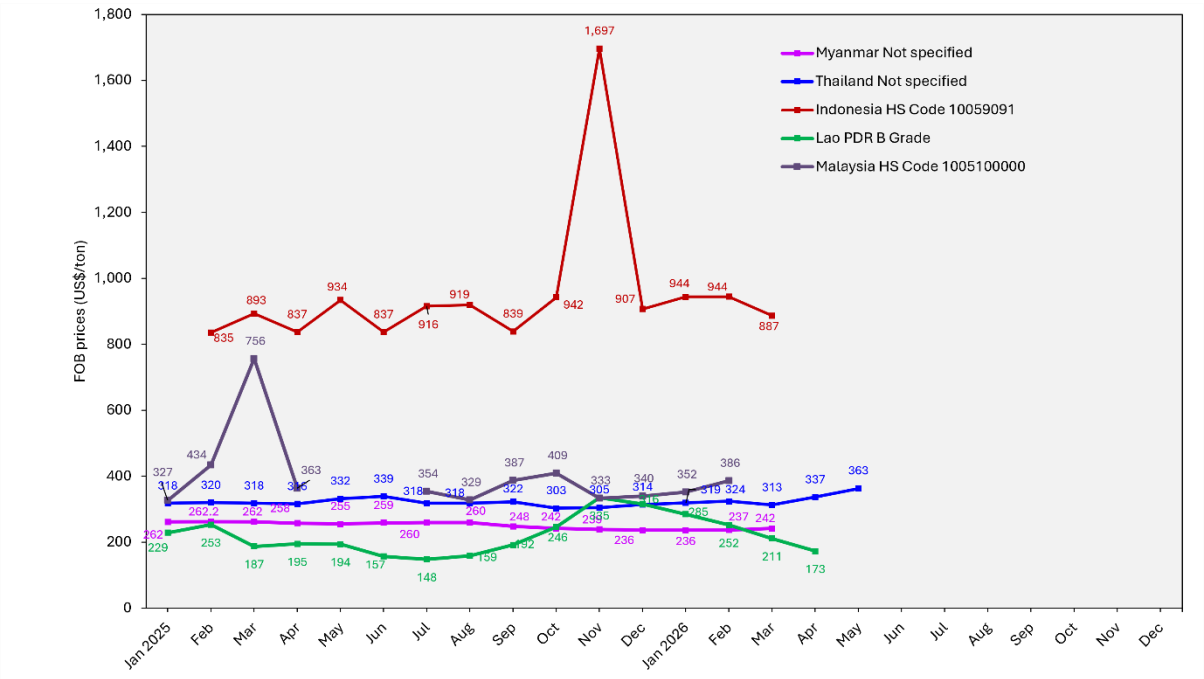


Figure 29. FOB prices (US$/ton) of maize of selected countries in ASEAN from 2025 to 2026.

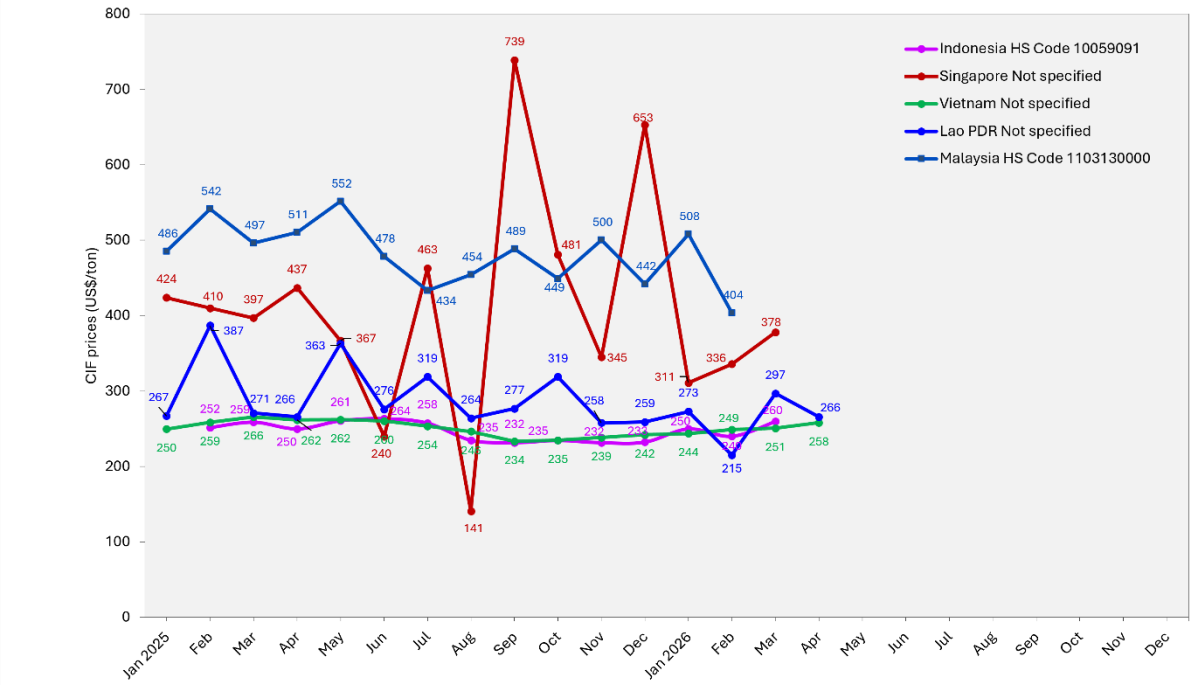


Figure 30. CIF prices (US$/ton) of maize of selected countries in ASEAN from 2025 to 2026.

Highlights of Sugarcane Outlook for 2027

ASEAN sugar supply is forecast to increase by approximately 1.34 million tons (2.71 percent increases) from 49.50 million tons in 2026 to 50.84 million tons in 2027, attributing to the increase in beginning stock and import (Table 31). The beginning stock of sugar is forecast to increase by 2.95 million tons (13.42 percent increases) from 21.98 million tons in 2026 to 24.93 million tons in 2027. The sugar production is forecast to decrease by 2.12 million tons (10.79 percent decreases) from 19.65 million tons in 2026 to 17.53 million tons in 2027. The sugar import in 2027 is forecast to increase by approximately 0.51 million tons (6.48 percent increases) from 7.87 million tons in 2026 to 8.38 million tons in 2027.

ASEAN sugar demand is forecast to increase, attributing to the export and ending stock. The domestic utilization of sugar from ASEAN in 2027 is expected to decrease by 0.18 million tons (2.71 percent decreases) from 16.71 million tons in 2026 to 16.53 million tons 2027. The sugar export is forecast to increase by 0.29 million tons (3.69 percent increases) from 7.86 million tons in 2026 to 8.15 million tons in 2027. The ending stock is forecast to rise by 1.23 million tons (4.93 percent increases) from 24.93 million tons in 2026 to 26.16 million tons in 2027.

The production to domestic utilization ratio (self-sufficiency ratio) for sugar in 2027 is forecast to be 106.09 percent, which decreases from 117.61 percent in 2026.

The beginning stock to domestic utilization ratio (food security ratio) in 2027 is forecast to be 150.84 percent, which increases from 131.52 percent in 2026.

Table 31. Summary of the ASEAN sugar situation from 2026 to 2027.

Unit: Million tons

Items	2026	2027	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	49.50	50.84	1.34	2.71
Beginning stock	21.98	24.93	2.95	13.42
Production	19.65	17.53	-2.12	-10.79
Import	7.87	8.38	0.51	6.48
Demand (Million tons)	49.50	50.84	1.34	2.71
Domestic utilization	16.71	16.53	-0.18	-1.08
Export	7.86	8.15	0.29	3.69
Ending stock	24.93	26.16	1.23	4.93
Ratio of production to domestic utilization (%)	117.61	106.09	-	-
Ratio of beginning stock to domestic utilization (%)	131.52	150.84	-	-

ASEAN Sugarcane Situation in 2026

Production

The sugarcane production in ASEAN for 2026 (crop year 2025/2026) is at 201.31 million tons, representing an increase of 14.03 million tons (7.49 percent increases) compared to 187.28 million tons in 2025 (crop year 2024/2025) (Table 32, Figure 31). The countries that show an increase in production include Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Myanmar, Thailand, and Vietnam. However, productions decrease only in the Philippines, which are resulted by the reduction in yield.

For Brunei Darussalam in 2026, the increase in the production is driven by favorable weather conditions, farmers applying more fertilizer, and improving crop management. However, information on the planted area, harvested area, and yield are not available. Sugarcane production is relatively small in this country. Therefore, the country relies on imports to supply its sugar requirements.

For Indonesia in 2026, the increase in production is attributed to expansions in both planted area and yield. The increase in planted area is driven by favorable weather conditions and supportive government policies. The increase in yield is influenced by favorable weather conditions and farmers improving crop management.

For Lao PDR in 2026, the increase in production is due to expansions in both planted area and yield. The expansion in planted area is driven by favorable weather conditions, particularly more reliable rainfall, as well as supportive government policies. Meanwhile, the increase in yield is supported by favorable weather conditions and the adoption of high-yielding sugarcane varieties, and improving crop management.

For Myanmar in 2026, the increase in sugarcane production is attributed to an expansion in the planted area, which more than offsets the decline in yield. The expansion in planted area is driven by rising sugarcane prices and declining prices of competing crops. Meanwhile, the decrease in yield is mainly due to flooding and fertilizer shortages.

For Thailand in 2026, the increase in production is attributed to both planted area and yield. The increase in planted areas is influenced by rising sugarcane prices and declining prices of competing crops. Meanwhile, the increase in yield is driven by favorable weather condition particularly sufficient rainfall and farmers improving crop management.

For Vietnam in 2026, the increase in production is attributed to the increase in both planted area and yield. The increase in planted area is driven by favorable weather conditions. Meanwhile, yield is increased due to farmers improving their crops.

Utilization and Stock

The domestic utilization of sugar in ASEAN increases by 0.70 million tons (4.37 percent increases) from 16.01 million tons in 2025 to 16.71 million tons in 2026 (Tables 37–38). The beginning stock of sugar in ASEAN increases by 4.54 million tons (26.05 percent increases) from 17.44 million tons in 2025 to 21.98 million tons in 2026. The ending stock of sugar in ASEAN increases by 2.55 million tons (11.37 percent increases) from 22.38 million tons in 2025 to 24.93 million tons in 2026.

The ratio of sugar production to domestic utilization (self-sufficiency ratio) in 2026

increases to 117.61 percent, compared to 111.22 percent in 2025. This indicates that ASEAN produced adequate sugar for regional consumption (Table 40, Figure 42). Moreover, on a country-by-country basis, sugar productions in Cambodia, Lao PDR, Myanmar, the Philippines, and Thailand exceed the demand for their domestic consumption.

The ratio of beginning stock to domestic utilization (food security ratio) in 2026 is 131.52 percent, compared to 108.89 percent in 2025. This indicates that sugar availability in the region increases from the previous year (Table 41, Figure 43).

Trade

ASEAN's sugar exports increase in 2026 by 2.75 million tons (53.84 percent increases) from 5.11 million tons in 2025 to 7.86 million tons (Tables 37–38, Figures 35–36). In terms of imports, ASEAN as a whole import approximately 7.87 million tons of sugar in 2026, showing a decrease from 8.26 million tons in 2025 (Tables 37–38, Figures 37–38).

The quantity and value of sugar exports by destination countries and the quantity and value of sugar imports by origin countries are provided in Tables 42 and 43, respectively.

Prices

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN from 2025 to 2026 are presented in Tables 44–45. Thailand is the primary of exporter in ASEAN countries in term of raw sugar. The average of Thailand’s FOB prices in 2026 for raw sugar is amounted of 339 US$ per ton (January–March).

Damage Area

The damaged area of sugarcane in 2026 is 5,284 hectares. Of this, 4,800 hectares are caused by disease outbreaks, particularly in Thailand (Table 36).

Prospects for Sugarcane in 2027

Production

Sugarcane production in ASEAN is forecast to decrease by 15.47 million tons (7.68 percent decreases) from 201.31 million tons in 2026 to 185.85 million tons in 2027 (Tables 32–35, Figures 31–34). The sugarcane production trends for 2027 in ASEAN countries depict a mixed scenario. In Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Myanmar, the Philippines, and Vietnam are expected to increase in sugarcane production. On the other hand, Thailand is expected to decrease in sugarcane production. Thailand is the largest sugar-producing country in the region, which is forecast to decrease its production from 107.87 million tons in 2026 to 86.89 million tons in 2027.

For Brunei Darussalam in 2027, the production is expected to increase due to favorable weather conditions, fertilizer sufficiency, and improving crop management.

For Indonesia in 2027, the production is expected to increase due to the increases in planted area and yield due to favorable weather conditions and supportive government policies alongside farmers improving their crop management.

For Lao PDR in 2027, the production is expected to increase attributing to the increases in planted area and yield. These increases are due to rising sugarcane prices, government policies and fertilizer sufficiency, farmers adopting to use the high yield of sugarcane varieties, and improving crop management.

For Thailand in 2027, the production is expected to decrease attributing to the reductions in both planted areas and yields. The decrease is affected by declining sugarcane prices and unfavorable weather conditions. Meanwhile, yield is expected to decrease influenced by drought condition.

For Vietnam in 2027, the production is expected to increase due to the expansions in both planted areas and yields. The increase is driven by rising sugarcane prices. Meanwhile, yield is expected to rise due to farmers improving crop management.

Utilization and Stock

The domestic utilization of sugar in ASEAN is forecast to decrease from 16.71 million tons in 2026 to 16.53 million tons in 2027, reflecting a decrease of 0.190 million tons (1.11 percent decreases) (Tables 38–39). The beginning stock in ASEAN is estimated at 24.93 million tons of sugar in 2027, increasing 2.95 million tons (13.42 percent increases) from 21.98 million tons in 2026.

The ending stock of sugar in ASEAN is forecast to reach 26.16 million tons in 2027, increasing 1.24 million tons (4.96 percent increases) from around 24.93 million tons in 2026.

The ratio of production to domestic utilization in 2027 is forecast to be 106.09 percent, down from 117.61 percent in 2026 (Table 40, Figure 42).

The ratio of the beginning stock to domestic utilization in 2027 is forecast to be 150.84 percent, an increase from 131.52 percent in 2026 (Table 41, Figure 43).

Trade

The export is predicted to increase from 7.86 million tons in 2026 to 8.15 million tons in 2027 (Tables 38–39, Figures 35–37). The import is expected to be 8.38 million tons in 2027, an increase from 7.87 million tons in 2026 (Tables 38–39, Figures 38–40).

Summary

In 2026, ASEAN sugarcane production increased significantly, supported by favorable weather, expanded planted areas, and improved crop management. This was broadly consistent with the global recovery in sugar production in 2025/26, which is expected to reach a near-record level and generate a substantial production surplus [10,11]. Consequently, ASEAN's sugar availability improved, with the self-sufficiency ratio rising to 117.61 percent and exports increasing substantially.

However, the outlook for 2027 is less favorable, as ASEAN sugarcane production is forecast to decline by 7.68 percent, mainly due to a sharp reduction in Thailand's production. This is consistent with the expected easing of global sugar production in 2026/27, as lower output in major producers, including Brazil and Thailand, is expected to narrow the global surplus [11,12]. At the same time, climate risks, particularly the potential return of El Niño, could further affect sugarcane yields in Asia and increase pressure on global sugar supplies [10,13].

The sugar market is also increasingly exposed to crisis-related risks. Geopolitical tensions and disruptions around the Strait of Hormuz have increased uncertainty over energy, fertilizer availability, and international shipping costs, while the interaction with climate risks could amplify commodity price volatility [13]. In addition, higher energy prices can influence the allocation of sugarcane between sugar and ethanol, particularly in Brazil, thereby affecting global sugar availability [12,14]. These factors have already contributed to renewed upward pressure on global sugar prices, despite relatively favorable global supply fundamentals [15].

Overall, ASEAN is expected to maintain adequate sugar availability in 2027 due to relatively high stocks. Nevertheless, declining production, lower exportable surpluses, climate uncertainty, and geopolitical and input-cost risks could increase the region's exposure to international sugar price volatility and raise import requirements.

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Table 32. Sugarcane production in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**187,279.08**	**201,310.31**	**14,031.23**	**7.49**	**185,845.18**	**-15,465.13**	**-7.68**
Brunei	0.05	0.07	0.02	43.39	0.07	0.00	5.00
Cambodia	1,408.94	1,717.11*	308.17	21.87	1,791.17*	74.06	4.31
Indonesia	39,069.97	40,860.08	1,790.11	4.58	42,853.97	1,993.90	4.88
Lao PDR	1,762.20	1,815.00	52.80	3.00	1,867.80	52.80	2.91
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	11,537.09	11,642.33	105.24	0.91	11,829.60*	187.26	1.61
Philippines	25,972.78	23,382.26*	-2,590.52	-9.97	26,025.30*	2,643.04	11.30
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	94,040.25	107,866.15	13,825.90	14.70	86,888.86	-20,977.29	-19.45
Vietnam	13,487.80	14,027.31	539.51	4.00	14,588.40	561.09	4.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/P refers to Not Planting.

Table 33. Sugarcane planted area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**3,058.57**	**3,113.55**	**54.98**	**1.80**	**3,068.44**	**-45.11**	**-1.45**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	43.08	48.22*	5.14	11.93	50.30*	2.08	4.31
Indonesia	563.36	576.54	13.18	2.34	604.67	28.13	4.88
Lao PDR	36.34	36.80	0.46	1.27	37.26	0.46	1.25
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	169.68	173.23	3.54	2.09	174.40*	1.17	0.68
Philippines	458.38*	459.00*	0.62	0.13	459.00*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1,591.22	1,617.37	26.14	1.64	1,534.34	-83.03	-5.13
Vietnam	196.50	202.40	5.90	3.00	208.47	6.07	3.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 34. Sugarcane harvested area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**3,055.00**	**3,108.26**	**53.26**	**1.74**	**3,068.44**	**-39.83**	**-1.28**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	39.55	48.22*	8.67	21.92	50.30*	2.08	4.31
Indonesia	563.36	576.54	13.18	2.34	604.67	28.13	4.88
Lao PDR	36.34	36.80	0.46	1.27	37.26	0.46	1.25
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	169.65	173.22	3.58	2.11	174.40*	1.18	0.68
Philippines	458.38*	459.00*	0.62	0.13	459.00*	0.00	0.00
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1,591.22	1,612.09	20.86	1.31	1,534.34	-77.75	-4.82
Vietnam	196.50	202.40	5.90	3.00	208.47	6.07	3.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 35. Sugarcane yield in ASEAN countries from 2025 to 2027.

Unit: ton/hectare

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	61.30	64.77	3.47	5.66	60.57	-4.20	-6.48
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	35.62	35.61*	-0.01	-0.03	35.61*	0.00	0.00
Indonesia	69.35	70.87	1.52	2.19	70.87	0.00	0.00
Lao PDR	48.49	49.32	0.83	1.71	50.13	0.81	1.64
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	68.01	67.21	-0.80	-1.18	67.83*	0.62	0.92
Philippines	56.66	56.70*	-5.72	-10.10	56.70*	5.76	11.31
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	59.10	66.91	7.81	13.21	56.63	-10.28	-15.36
Vietnam	68.64	69.31	0.67	0.98	69.98	0.67	0.97

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 36. Sugarcane damaged area in ASEAN countries by cause of damage in 2026.

Unit: hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	**4**	**0**	**480**	**4,800**	**0**	**0**	**5,284**
Brunei	0	0	0	0	0	0	0
Cambodia	0	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0
Myanmar	4	0	0	0	0	0	4
Philippines	0	0	0	0	0	0	0
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	0	0	480	4,800	0	0	5,280
Vietnam	0	0	0	0	0	0	0

Remarks: N/P refers to Not Planting.

Table 37. Sugar balance sheet of ASEAN countries in 2025.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**17,435,967**	**17,808,963**	**8,257,478**	**43,502,408**	**16,012,100**	**5,108,325**	**22,381,983**	**43,502,408**
Brunei	542	0	5,880	6,422	5,033	0	1,389	6,422
Cambodia	0	140,894	0	140,894	136,666	4,228	0	140,894
Indonesia	1,388,229	2,668,075	3,927,965	7,984,269	6,440,388	89,311	1,454,570	7,984,269
Lao PDR	182,670	352,440	287,183	822,293	253,070	474,282	94,941	822,293
Malaysia	0	0	2,390,312	2,390,312	2,146,603	243,709	0	2,390,312
Myanmar	479,075*	922,968	75,000*	1,477,043	593,000*	71,000*	813,043*	1,477,043
Philippines	291,081	2,077,352	404,343	2,772,776	1,836,117	66,085	870,573	2,772,776
Singapore	0	N/P	206,072	206,072	148,343	57,729	0	206,072
Thailand	14,203,258*	10,298,454	122,358	24,624,070	2,470,000*	3,952,202	18,201,868	24,624,070
Vietnam	891,112	1,348,780	838,366	3,078,257	1,982,880	149,779	945,598	3,078,257

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 38. Sugar balance sheet of ASEAN countries in 2026.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**21,977,919**	**19,653,574**	**7,865,945**	**49,497,438**	**16,711,039**	**7,858,508**	**24,927,891**	**49,497,438**
Brunei	1,389	0	5,998	7,387	5,133	0	2,254	7,387
Cambodia	0	171,711*	0	171,711*	137,681*	34,030*	0	171,711
Indonesia	1,454,570	2,892,201	4,410,332	8,757,103	7,264,447	154,901	1,337,755	8,757,103
Lao PDR	94,941	363,000	121,480	579,421	245,000	160,098	174,323	579,421
Malaysia	0	0	2,290,479*	2,290,479	2,046,479*	244,000*	0	2,290,479
Myanmar	813,043*	931,386	84,000*	1,828,429	452,000*	85,000*	1,291,429*	1,828,429
Philippines	466,510	2,080,000*	29,502	2,576,012	2,000,000*	0	576,012	2,576,012
Singapore	0	N/P	218,880	218,880	177,696	41,184	0	218,880
Thailand	18,201,868	11,812,544	5,239	30,019,651	2,360,066	7,000,000	20,659,585	30,019,651
Vietnam	945,598	1,402,731	700,035	3,048,365	2,022,538	139,294	886,533	3,048,365

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 39. Sugar balance sheet of ASEAN countries in 2027.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**24,927,891**	**17,531,534**	**8,379,281**	**50,838,706**	**16,525,794**	**8,149,477**	**26,163,434**	**50,838,706**
Brunei	2,253.749	0	6,058	8,311	5,185	0	3,127	8,311
Cambodia	0	179,117*	0	179,117*	137,174*	41,944*	0	179,117
Indonesia	1,337,755	2,978,351	4,550,608	8,866,715	6,909,915	161,540	1,795,260	8,866,715
Lao PDR	174,323	373,560	274,789	822,672	243,695	442,207	136,770	822,672
Malaysia	0	0	2,325,318*	2,325,318	2,081,318*	244,000*	0	2,325,318
Myanmar	1,291,429*	946,367*	80,000*	2,317,796*	522,500*	78,000*	1,717,296*	2,317,796
Philippines	576,012*	2,080,000*	300,000*	2,956,012*	2,000,000*	0	956,012	2,956,012
Singapore	0	N/P	212,476	212,476	163,020	49,457	0	212,476
Thailand	20,659,585	9,515,298	0	30,174,883	2,400,000	7,000,000	20,774,883	30,174,883
Vietnam	886,533	1,458,840	630,032	2,975,405	2,062,988	132,330	780,087	2,975,405

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 40. Ratio of sugar production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**17,808,963.00**	**16,012,099.93**	**111.22**	**19,653,573.62**	**16,711,039.21**	**117.61**	**17,531,533.96**	**16,525,794.32**	**106.09**
Brunei	0.00	5,032.55	0.00	0.00	5,133.20	0.00	0.00	5,184.53	0.00
Cambodia	140,894.00	136,666.00	103.09	171,711.42	137,681.00	124.72	179,117.39	137,173.50	130.58
Indonesia	2,668,075.00	6,440,387.52	41.43	2,892,201.00	7,264,446.79	39.81	2,978,351.12	6,909,914.96	43.10
Lao PDR	352,440.00	253,070.39	139.27	363,000.00	245,000.00	148.16	373,560.00	243,695.43	153.29
Malaysia	0.00	2,146,603.00	0.00	0.00	2,046,479.00	0.00	0.00	2,081,318.00	0.00
Myanmar	922,968.00	593,000.00	155.64	931,386.00	452,000.00	206.06	946,367.00	522,500.00	181.12
Philippines	2,077,352.00	1,836,117.00	113.14	2,080,000.00	2,000,000.00	104.00	2,080,000.00	2,000,000.00	104.00
Singapore	N/P	148,343.47	0.00	N/P	177,695.62	0.00	N/P	163,019.55	0.00
Thailand	10,298,454.00	2,470,000.00	416.94	11,812,544.00	2,360,066.00	500.52	9,515,298.00	2,400,000.00	396.47
Vietnam	1,348,780.00	1,982,880.00	68.02	1,402,731.20	2,022,537.60	69.36	1,458,840.45	2,062,988.35	70.71

Remarks: N/P refers to Not Planting.

Table 41. Ratio of sugar beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**17,435,966.73**	**16,012,099.93**	**108.89**	**21,977,919.26**	**16,711,039.21**	**131.52**	**24,927,890.78**	**16,525,794.32**	**150.84**
Brunei	541.90	5,032.55	10.77	1,389.35	5,133.20	27.07	2,253.75	5,184.53	43.47
Cambodia	0.00	136,666.00	0.00	0.00	137,681.00	0.00	0.00	137,173.50	0.00
Indonesia	1,388,229.00	6,440,387.52	21.56	1,454,570.00	7,264,446.79	20.02	1,337,755.21	6,909,914.96	19.36
Lao PDR	182,670.17	253,070.39	72.18	94,940.66	245,000.00	38.75	174,323.18	243,695.43	71.53
Malaysia	0.00	2,146,603.00	0.00	0.00	2,046,479.00	0.00	0.00	2,081,318.00	0.00
Myanmar	479,075.00	593,000.00	80.79	813,043.00	452,000.00	179.88	1,291,429.00	522,500.00	247.16
Philippines	291,081.00	1,836,117.00	15.85	466,510.00	2,000,000.00	23.33	576,012.00	2,000,000.00	28.80
Singapore	0.00	148,343.47	0.00	0.00	177,695.62	0.00	0.00	163,019.55	0.00
Thailand	14,203,258.00	2,470,000.00	575.03	18,201,868.00	2,360,066.00	771.24	20,659,585.00	2,400,000.00	860.82
Vietnam	891,111.66	1,982,880.00	44.94	945,598.24	2,022,537.60	46.75	886,532.63	2,062,988.35	42.97

Table 42. Quantity and value of sugar exports by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	Thailand	5,998	N/A	5,998	N/A	0	0	5,998	N/A
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	842	413,931	532	1,098,803	7	7,522	539	1,106,325
	Philippines	6	10,491						
	Singapore	1,112	553,732						
	Timor-Leste	1	1,756						
Lao PDR	Cambodia	1,580	806,400	150,540	76,623,156	9,558	5,269,363	160,098	81,892,519
	Vietnam	148,960	75,816,756						
Malaysia	Cambodia	353	203,959	4,388	2,373,794	2,101	1,165,784	6,490	3,539,577
	Indonesia	226	162,593						
	Philippines	150	76,654						
	Singapore	3,360	1,783,337						
	Vietnam	300	147,250						
Myanmar	-	0	0	0	0	0	0	0	0
Philippines	-	0	0	0	0	0	0	0	0
Singapore	-	0	0	0	0	0	0	0	0
Thailand	Brunei	18	18,152	1,078,405	405,925,163	784,548	315,310,147	1,862,953	721,235,310
	Cambodia	158,650	67,168,811						
	Indonesia	493,350	156,025,878						
	Lao PDR	109,671	47,234,948						
	Malaysia	143,836	57,478,151						
	Myanmar	33,732	17,262,034						
	Philippines	48,447	20,966,270						
	Singapore	36,423	17,324,284						
	Vietnam	54,278	22,446,635						
Vietnam	Cambodia	N/A	11,548,650	N/A	39,287,437	N/A	63,539,651	N/A	102,827,087
	Indonesia	N/A	2,978,189						
	Lao PDR	N/A	778,786						
	Malaysia	N/A	3,196,823						
	Myanmar	N/A	43,309						
	Philippines	N/A	5,804,810						
	Singapore	N/A	905,286						
	Thailand	N/A	14,031,585						

Remarks: N/A refers to Not Available.
The hyphen (-) indicates no country destination's export.

Table 43. Quantity and value of sugar imports by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	Thailand	5,998	N/A	5,998	0	0	0	5,998	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	12	8,978	632,954	278,041,826	202,336	86,908,481	835,289	364,950,307
	Singapore	0.17	226						
	Thailand	632,941	278,032,529						
	Vietnam	0.0040	93						
Lao PDR	Thailand	121,440	59,748,424	121,440	59,748,424	40	19,850	121,480	59,768,274
Malaysia	Indonesia	620	338,667	87,196	40,910,223	202,619	87,048,859	289,815	127,959,082
	Philippines	2	4,258						
	Singapore	13	23,801						
	Thailand	86,562	40,543,497						
Myanmar	-	0	0	0	0	0	0	0	0
Philippines	Indonesia	29,502	14,974,879	29,502	14,974,879	0	0	29,502	14,974,879
Singapore	Indonesia	5,042	2,624,708	168,435	86,465,341	50,445	30,076,715	218,880	116,542,056
	Malaysia	33,843	16,479,449						
	Myanmar	106	43,800						
	Philippines	3	15,356						
	Thailand	125,509	65,235,429						
	Vietnam	3,932	2,066,598						
Thailand	Lao PDR	55,979	14,540,103	320,594	86,391,746	0	0	320,594	86,391,746
	Myanmar	264,616	71,851,643						
Vietnam	Cambodia	N/A	13,066,758	0	96,965,433	0	104,826,080	0	201,791,513
	Indonesia	N/A	3,542,877						
	Lao PDR	N/A	17,182,889						
	Malaysia	N/A	3,289,098						
	Myanmar	N/A	12,039,946						
	Philippines	N/A	4,591,133						
	Thailand	N/A	118,047						
	Vietnam	N/A	43,134,685						

Remarks: N/A refers to Not Available.
The hyphen (-) indicates no country destination's import.

Table 44. FOB prices of sugar in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Raw Sugar	2025	885	1,485	1,077	1,696	1,030	1,156	1,644	1,498	735	1,516	2,573	1,588	1,407
		2026	996	2,592	681	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,423
	White Sugar	2025	1,873	1,458	1,845	1,475	878	1,824	1,616	1,265	1,539	944	957	1,559	1,436
		2026	1,456	2,080	1,839	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,792
Lao PDR	White sugar	2025	616	530	586	538	542	550	547	517	542	567	553	530	551
		2026	580	560	540	538	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	555
Malaysia	HS code 1701910000	2025	1,602	1,654	1,663	1,367	1,879	1,692	1,535	1,757	1,545	1,125	1,396	1,705	1,577
		2026	1,200	1,540	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,370
	HS code 1701991000	2025	615	570	580	573	571	566	528	523	506	494	508	499	544
		2026	523	497	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	510
	HS code 1701999000	2025	5	4	1	2	4	1	5	1	1	1	4	3	3
		2026	4	4	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	4
Myanmar	Raw Sugar	2025	0	0	62	40	0	0	0	0	0	0	0	115	72
		2026	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Philippines	Muscovado Exports	2025	2,441.35	2,483.87	2,408.57	2,503.73	2,063.72	1,983.09	2,272.24	2,558.51	2,302.53	2,469.80	2,003.10	2,188.83	2,307
		2026	2,327.68	4,452.16	2,410.87	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	3,064
	Molasses Imports	2025	190.17	163.00	180.12	140.45	157.63	163.76	155.56	154.88	135.04	131.55	139.77	N/A	156
		2026	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Thailand	Raw Sugar	2025	450.72	465.77	449.39	440.24	458.20	461.90	404.50	397.92	390.19	416.50	460.64	458.44	438
		2026	358.36	342.30	315.48	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	339
	White Sugar	2025	544.32	534.41	549.07	543.93	526.87	510.55	519.51	479.89	496.69	474.07	479.93	481.83	512
		2026	442.28	420.46	397.28	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	420

Remarks: N/A refers to Not Available.

Table 45. CIF prices of sugar in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Raw Sugar	2025	511	522	518	520	498	480	468	462	459	449	445	432	**480**
		2026	444	439	430	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**438**
	White sugar	2025	3,248	11,000	6,818	12,838	17,750	3,250	67,929	89	20,000	27,571	0	48,000	**19,863**
		2026	912	1,278	880	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**1,023**
Lao PDR	White sugar	2025	475	500	493	496	495	496	498	503	495	465	491	486	**491**
		2026	500	520	503	490	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**503**
Malaysia	HS code 1701130000	2025	0	0	0	0	0	0	0	0	0	0	0	497	**497**
		2026	0	1,408	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**1,408**
	HS code 1701140000	2025	555	548	511	531	531	486	466	461	452	443	469	432	**491**
		2026	434	391	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**412**
	HS code 1701910000	2025	637	855	950	1,071	1,121	1,115	1,023	800	856	871	764	838	**908**
		2026	776	1,044	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**910**
	HS code 1701991000	2025	641	604	608	618	605	592	574	561	550	543	524	517	**578**
		2026	532	517	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**524**
	HS code 1701999000	2025	6	3	2	2	2	2	5	5	4	3	5	5	**4**
		2026	4	2	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**3**
Singapore	Not specified	2025	626	617	610	605	571	566	550	552	532	540	548	535	**571**
		2026	535	532	544	520	531	502	496	487	464	472	473	401	**496**

Remarks: N/A refers to Not Available.

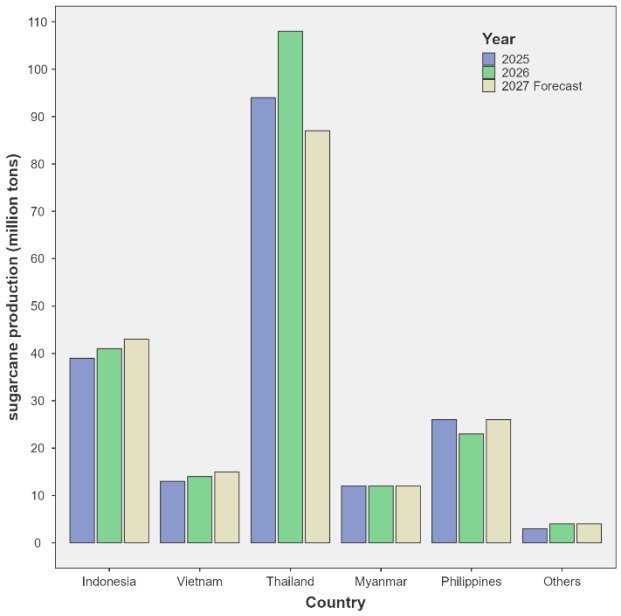


Figure 31. Sugarcane production of selected countries in ASEAN from 2025 to 2027.

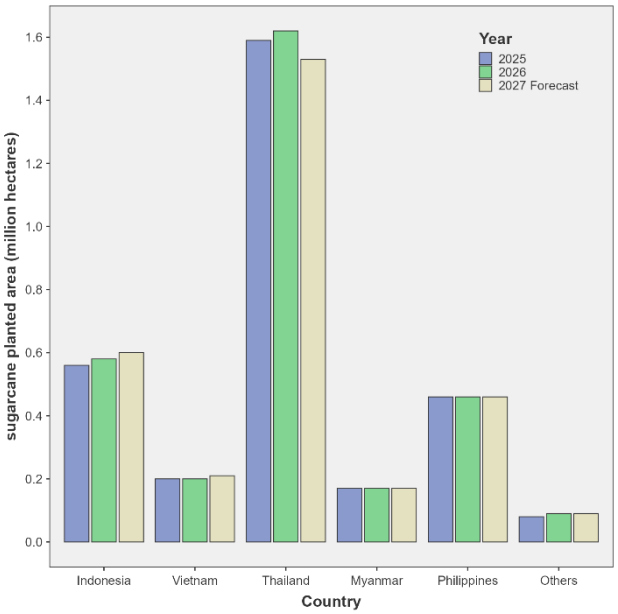


Figure 32. Sugarcane planted area of selected countries in ASEAN from 2025 to 2027.

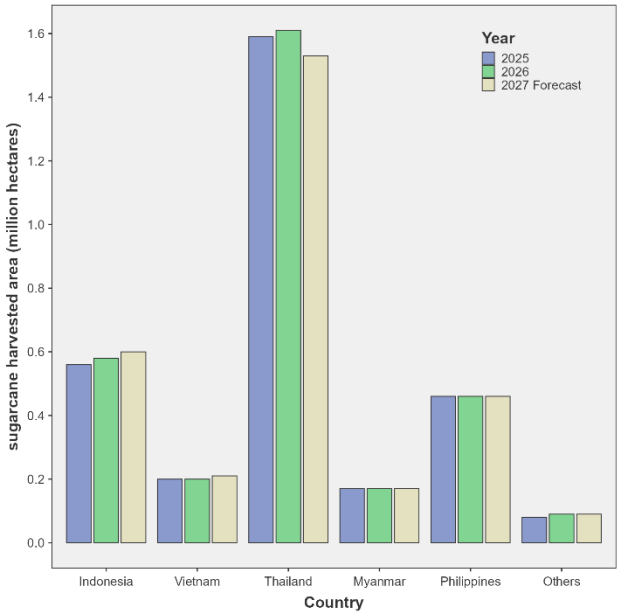


Figure 33. Sugarcane harvested area of selected countries in ASEAN from 2025 to 2027.

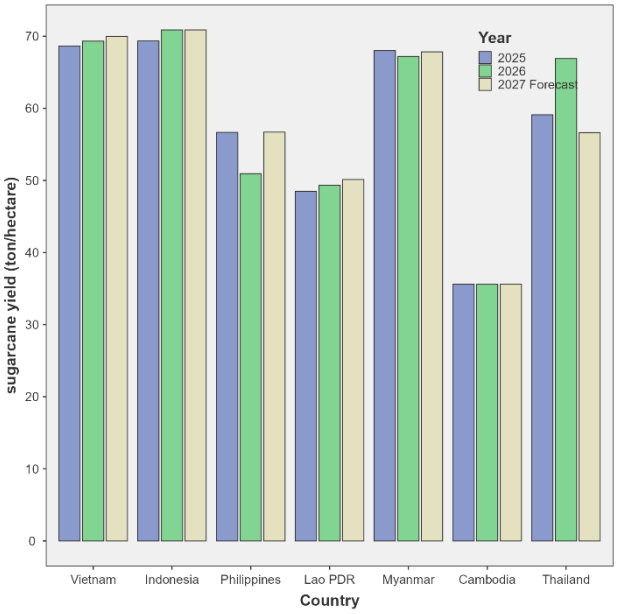


Figure 34. Sugarcane yield of selected countries in ASEAN from 2025 to 2027.

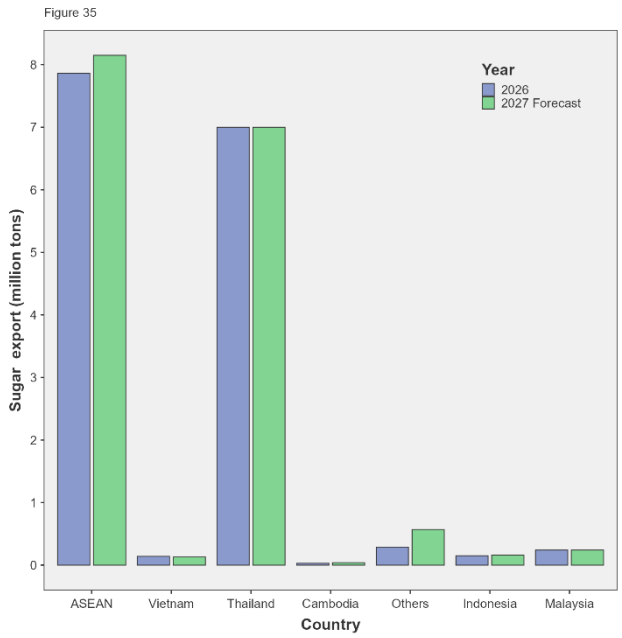


Figure 35. Amount of sugar exports of selected countries in ASEAN from 2026 to 2027.

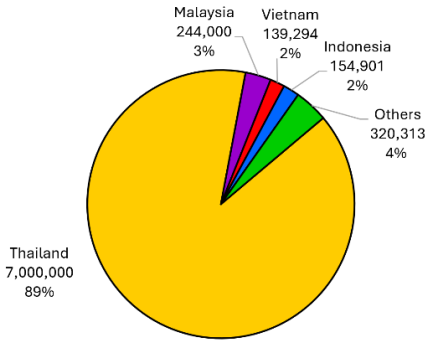


Figure 36. Share of sugar exports (tons) among ASEAN countries in 2026, totaling 7.86 million tons.

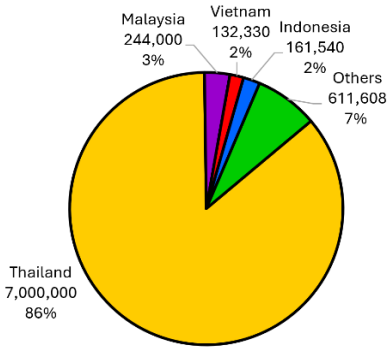


Figure 37. Share of sugar exports (tons) among ASEAN countries in 2027, totaling 8.15 million tons.

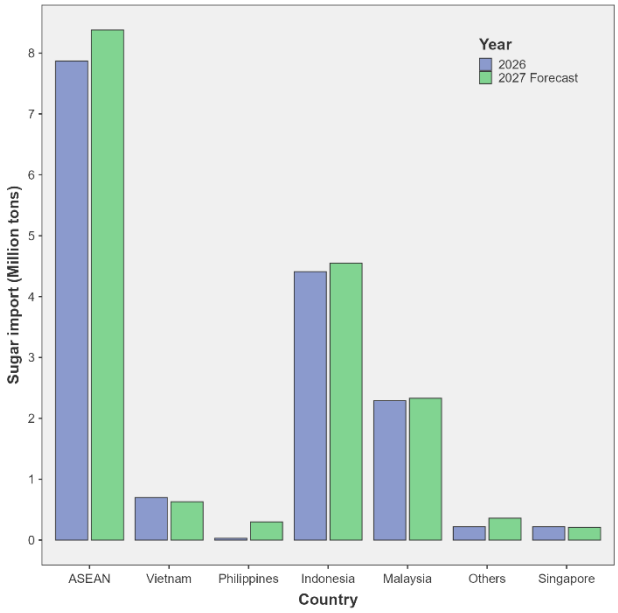


Figure 38. Amount of sugar imports of selected countries in ASEAN from 2026 to 2027.

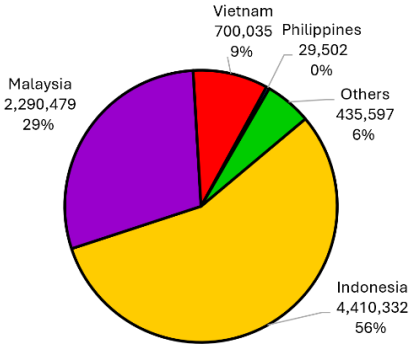


Figure 39. Share of sugar imports (tons) among ASEAN countries in 2026, totaling 7.87 million tons.

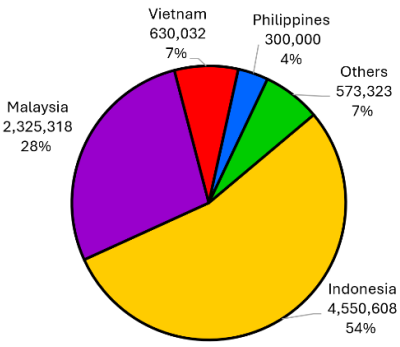


Figure 40. Share of sugar imports (tons) among ASEAN countries in 2027, totaling 8.38 million tons.

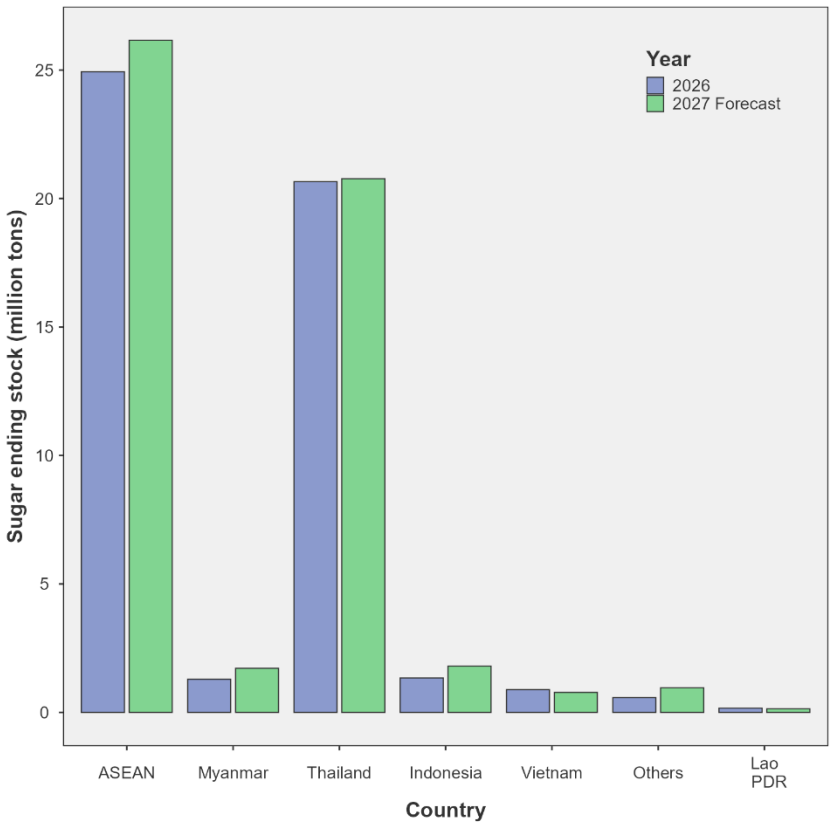


Figure 41. Amount of ending stock of sugar in ASEAN from 2026 to 2027.

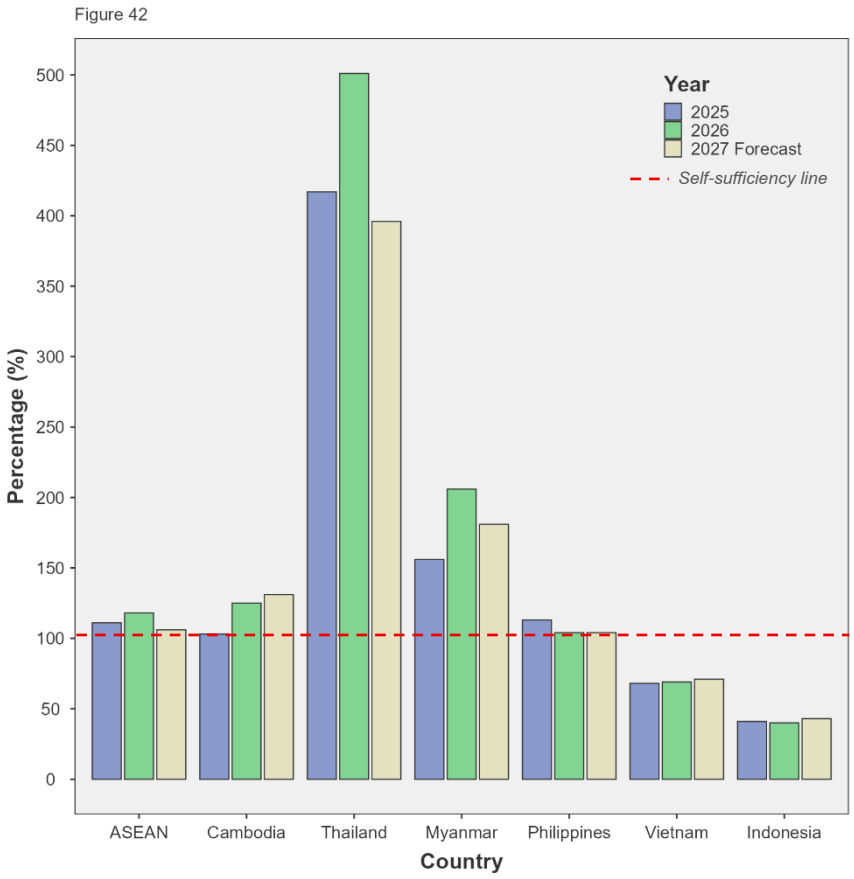


Figure 42. Ratio of sugar production to domestic utilization in ASEAN from 2025 to 2027.

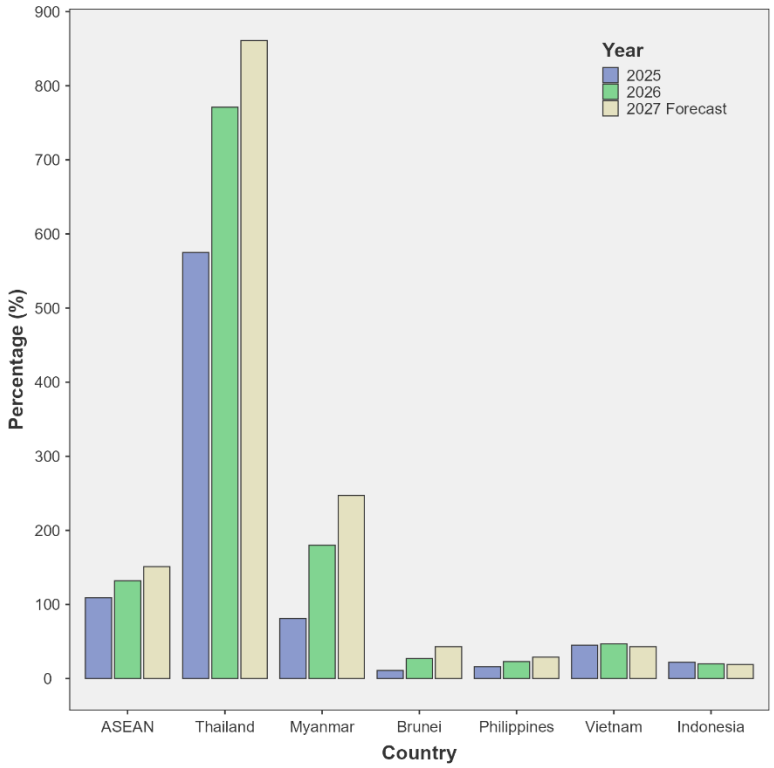


Figure 43. Ratio of sugar beginning stock to domestic utilization in ASEAN from 2025 to 2027.

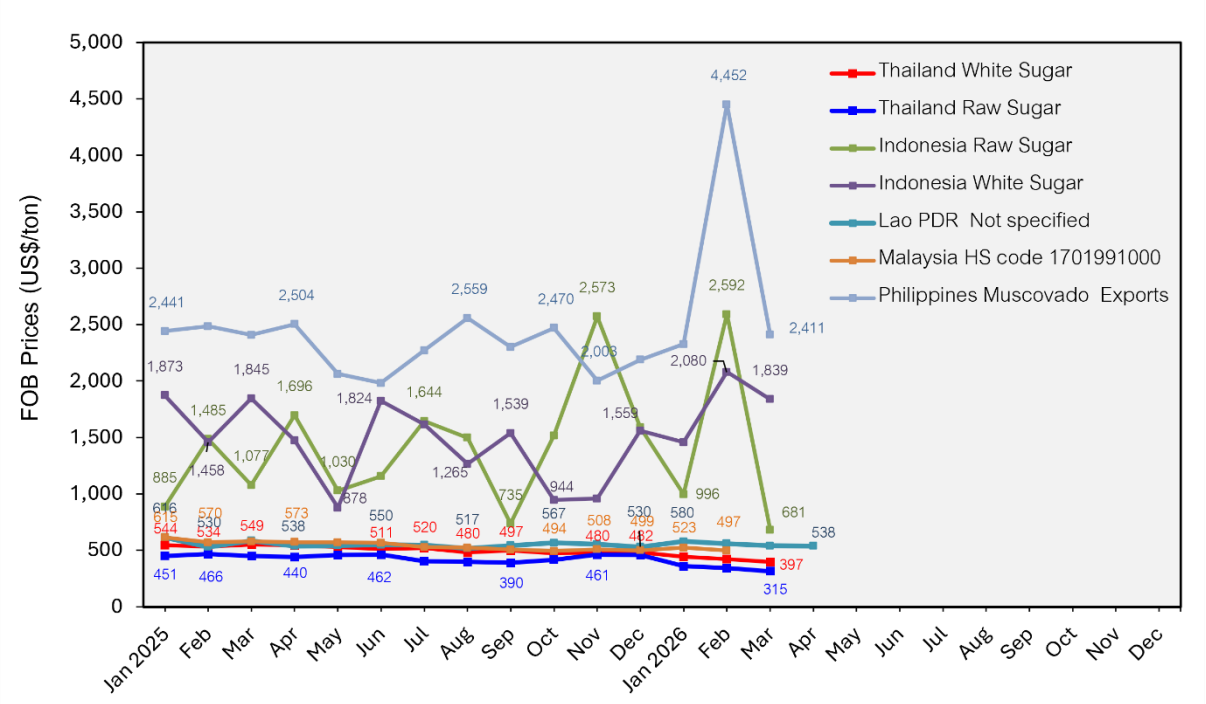


Figure 44. FOB prices (US$/ton) of sugar of selected countries in ASEAN from 2025 to 2026.

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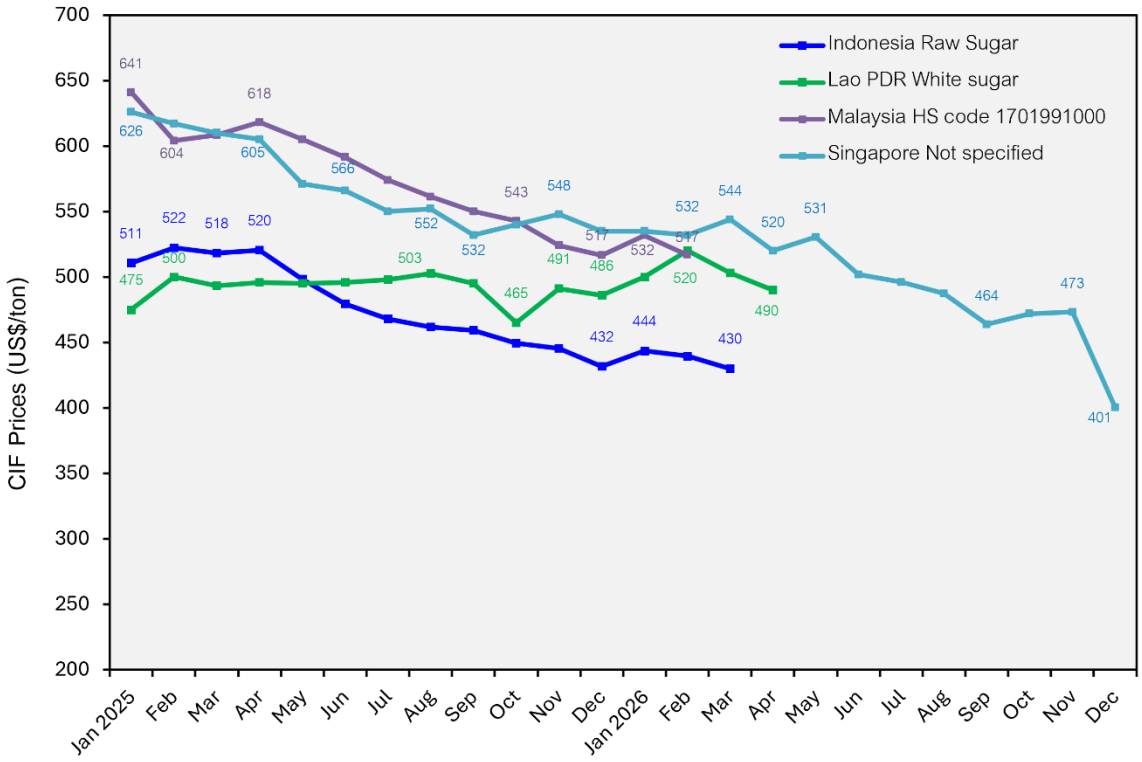


Figure 45. CIF prices (US$/ton) of sugar of selected countries in ASEAN from 2025 to 2026.

Highlights of Soybean Outlook for 2027

The forecast for the supply of soybeans in ASEAN indicates an increase from 12.37 million tons in 2026 to 12.91 million tons in 2027, reflecting an increase of 0.54 million tons (4.37 percent increases) (Table 46). This growth in the soybean supply is driven by increases in both beginning stock and import. The beginning stock is estimated to increase to 0.84 million tons in 2027, rising for 0.28 million tons (50.00 percent increases) from 0.56 million tons in 2026. The soybean import is forecast to increase by 0.30 million tons (2.68 percent increases) from 11.19 million tons in 2026 to 11.49 million tons in 2027. Meanwhile, Soybean production for 2027 is forecast to decrease by 0.05 million tons (7.94 percent decreases), reflecting a decrease of 0.63 million tons in 2026 to 0.58 million tons in 2027.

Increases in soybean demand are attributed to domestic utilization and ending stock. The domestic utilization is forecast to increase by 0.23 million tons (2.02 percent increases) from 11.38 million tons in 2026 to 11.61 million tons in 2027. Exports are forecast to remain 0.15 million tons from the previous year. The ending stock is forecast to significantly increase by 0.31 million tons (36.90 percent increases) from 0.84 million tons in 2026 to 1.15 million tons in 2027.

The production to domestic utilization ratio (self-sufficiency ratio) in 2027 is forecast to be 4.96 percent, a decrease from 5.50 percent in 2026. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 7.27 percent in 2027, an increase from 4.90 percent in 2026.

Table 46. Summary of the ASEAN soybean situation from 2026 to 2027.

Unit: Million tons

Items	2026	2027	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	12.37	12.91	0.54	4.37
Beginning stock	0.56	0.84	0.28	50.00
Production	0.63	0.58	-0.05	-7.94
Import	11.19	11.49	0.30	2.68
Demand (Million tons)	12.37	12.91	0.54	4.37
Domestic utilization	11.38	11.61	0.23	2.02
Export	0.15	0.15	0.00	0.00
Ending stock	0.84	1.15	0.31	36.90
Ratio of production to domestic utilization (%)	5.50	4.96	-	-
Ratio of beginning stock to domestic utilization (%)	4.90	7.27	-	-

ASEAN Soybean Situation in 2026

Production

The soybean production in ASEAN in 2026 (crop year 2025/2026) is 0.63 million tons, an increase of 0.19 million tons from 0.44 million tons in 2025 (crop year 2024/2025). The increase in production is observed in Indonesia, Lao PDR, Myanmar, and Vietnam. A reduction in soybean production is observed in Cambodia, the Philippines, and Thailand (Tables 47–50, Figures 46–49).

For Indonesia in 2026, the increase in soybean production is attributed to an expansion in the planted area. The expansion is driven by rising soybean prices, favorable weather conditions, particularly during early 2026 when weak La Niña conditions are expected to maintain relatively favorable rainfall for agriculture, and supportive government policies during the first cropping season. Meanwhile, the reduction in soybean yield is due to fertilizer shortages.

For Lao PDR in 2026, the increase in the production is attributed to expansions in both planted area and yield. The increase is driven by rising soybean prices and supportive government policies. Meanwhile, the increase in yield is driven by fertilizer sufficiency and improving crop management.

For Myanmar in 2026, the increase in production is attributed to expansions in both planted area and yield. The increase in planted area is driven by rising soybean prices and declining prices of competing crops. Additionally, the increase in yield is driven by farmers improving crops management and improving crop management, despite some areas being affected by floods.

For the Philippines in 2026, the decrease in soybean production is mainly attributed to a reduction in yield. The decline in yield is influenced by reduced fertilizer application. Meanwhile, the planted area is expected to increase, supported by favorable weather conditions, particularly sufficient rainfall, and sustained demand for soybeans.

For Thailand in 2026, the decrease in soybean production is mainly attributed to a reduction in the planted area. The decline in planted area is driven by lower soybean prices, higher prices of competing crops, shortages of soybean seeds, and rising input costs. Meanwhile, soybean yield is expected to improve, which supported by sufficient water availability, favorable weather conditions, the adoption of high-yielding soybean varieties, and improved crop management practices by farmers, particularly during the second cropping season. However, yield declines during the first cropping season due to drought conditions, lower rainfall, and higher temperatures compared with the previous year. These conditions adversely affect soybean growth, resulting in stunted plants, smaller pods, and incomplete seed development.

For Vietnam in 2026, the increase in production is attributed to expansions in both planted area and yield. The expansion in planted area is driven by favorable weather conditions. Meanwhile, the improvement in yield is driven by farmers improving crop management.

Utilization and Stock

The domestic utilization of soybeans in ASEAN increases to 11.38 million tons in 2026, up from 10.63 million tons in 2025 (Tables 52–53). The beginning stock of soybeans in ASEAN for 2026 is at 0.56

million tons, up from 0.51 million tons in 2025. The ending stock of soybeans in ASEAN for 2026 is at 0.84 million tons, up from 0.56 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) in ASEAN for 2026 is 5.50 percent, reflecting an increase from 4.15 percent in 2025 (Table 55, Figure 57).

Additionally, *the food security ratio, representing the ratio of beginning stock to domestic utilization in ASEAN for 2026* is at 4.90 percent, showing an increase from 4.78 percent in 2025 (Table 56, Figure 58).

Trade

In 2026, ASEAN exports a total of 146,235 tons of soybeans, increasing 7,305 tons from 138,931 tons in 2025. Additionally, ASEAN countries import 11.19 million tons in 2026, increasing 0.82 million tons from 10.37 million tons in 2025 (Tables 52–53, Figures 50–51).

The quantity and value of soybean exports by destination countries, as well as the quantity and value of soybean imports by origin countries, are provided in Tables 57–58.

Prices

The monthly FOB prices of soybeans for exporting countries from 2025 to 2026 are presented in Table 59, and also the monthly CIF prices for importing countries are presented in Table 60 and Figures 59–60.

Damage Area

The total damaged area of soybeans in ASEAN in 2026 is at 220 hectares. The most causes of damage are droughts, which affected 39 hectares in Thailand, along with floods and unspecified damage of 21 and 160 hectares, respectively (Table 51).

Prospects for Soybean in 2027

Production

The forecast for soybean production in ASEAN in 2027 indicates an increase of 21,210 tons (3.39 percent increases) from 625,490 tons in 2026 to 646,700 tons in 2027 (Table 47, Figure 46). Increases in production are observed in Cambodia, Lao PDR, Myanmar, and the Philippines is expected to increase. However, production is expected to decline in Indonesia and Thailand. Meanwhile, Vietnam is expected to remain its soybean production.

For Indonesia in 2027, the production is expected to decrease, which is driven by the reduction in yield. The reduction in yield is expected to be affected by unfavorable applying fertilizer. Meanwhile, the planted area is expected to increase due to rising soybean prices, favorable weather conditions, and supportive government policies.

For Lao PDR in 2027, soybean production is expected to increase, primarily driven by an expansion in the planted area. The expansion is supported by rising soybean prices and supportive government policies. Meanwhile, soybean yield is expected to decline due to reduced fertilizer application and increased competition from cash crops.

For Thailand in 2027, soybean production is expected to decrease, mainly due to a reduction in the planted area. The decline in planted area is driven by lower soybean prices, shortages of soybean seeds, high input costs, and limited harvesting labor availability. Meanwhile, soybean yield is expected to increase slightly, supported by the adoption of high-yielding soybean varieties and improved crop management practices by farmers, despite the adverse effects of drought during the first cropping season.

For Vietnam in 2027, soybean production is expected to remain unchanged, as both the planted area and yield are estimated to remain at similar levels to the previous year.

Utilization and Stock

The domestic utilization of soybeans in ASEAN is forecast to increase by 0.23 million tons (2.03 percent increases) from 11.38 million tons in 2026 to 11.61 million tons in 2027 (Tables 52–53).

The beginning stock in ASEAN in 2027 is forecast to increase by 287,599 tons (51.61 percent increases) from 0.56 million tons in 2026 to 0.84 million tons in 2027 (Tables 53–54). The ending stock in ASEAN in 2027 is forecast to increase by 303,628 tons (35.94 percent increases) from 0.84 million tons in 2026 to 1.15 million tons in 2027 (Tables 53–54, Figure 56).

The ratio of production to domestic utilization (self-sufficiency ratio) in 2027 is estimated to be 4.96 percent, slightly decreasing from 5.50 percent in 2026 (Table 55, Figure 57).

The ratio of beginning stock to domestic utilization (food security ratio) in 2027 is estimated to be 7.27 percent in 2027, increasing from 4.90 percent in 2026 (Table 56, Figure 58).

Trade

The export of soybeans is forecast to increase by 2,765 tons (1.89 percent increases) from 146,235 tons in 2026 to 149,001 tons in 2027. The import of soybeans is forecast to increase by 0.30 million tons (2.68 percent increases) from 11.19 million tons in 2026 to 11.50 million

tons in 2027 (Tables 53–54, Figures 50, 52–53, and 55).

Summary

ASEAN soybean production is expected to increase from 0.63 million tons in 2026 to 0.65 million tons in 2027, mainly supported by higher production in Lao PDR, Myanmar, and the Philippines. However, domestic utilization remains substantially higher than production, increasing from 11.38 million tons in 2026 to 11.61 million tons in 2027. As a result, ASEAN remains highly dependent on imports, with the self-sufficiency ratio declining from 5.50 percent to 4.96 percent in 2027. Meanwhile, higher stocks are expected to strengthen the region's short-term buffer, with the food security ratio increasing from 4.90 percent to 7.27 percent.

Globally, soybean supply is expected to remain relatively strong, particularly due to continued production growth in Brazil. Brazil is projected to export around 110 million tons in the 2026/27 season, further strengthening its role as the world's leading soybean exporter [16-18]. Nevertheless, the global soybean market remains sensitive to weather conditions, China's import demand, trade policies, and biofuel-related demand [16,19]. These developments are important for ASEAN because the region's low domestic production capacity makes international soybean availability and prices critical to regional food security.

The 2026 Middle East conflict introduces an additional layer of risk to soybean, primarily through energy, fertilizer, transportation, and production costs rather than direct agricultural production losses. The Middle East is a major source of crude oil, natural gas, and fertilizer-related inputs. Following the beginning of the conflict, crude oil prices increased sharply, while wholesale urea prices in the United States rose from below 500 US$ per ton before the conflict to more than 650 US$ per ton by mid-March [20]. Approximately 10 percent of global urea production is located in the Middle East, meaning prolonged disruption could increase fertilizer costs internationally [20].

For soybean production, the effect is mixed. Soybeans require less direct nitrogen fertilizer than crops such as maize, so higher nitrogen fertilizer prices may encourage some farmers to shift acreage from maize toward soybeans. Nevertheless, higher energy, fuel, fertilizer, chemical, and transportation costs increase overall production costs and can reduce farm profitability [20]. This is particularly relevant for ASEAN countries where high input costs are already limiting soybean planted areas and production. The impact could therefore reinforce existing constraints in countries such as Thailand and the Philippines.

The conflict also affects international soybean prices through uncertainty in trade and energy markets. the United States soybean futures initially increased following the escalation of the conflict but subsequently declined, demonstrating that geopolitical shocks do not necessarily translate into sustained increases in agricultural commodity prices. The direct impact on global agricultural supply is also expected to be less severe than the Russia-Ukraine conflict because the Middle East is not itself a major agricultural production region. However, prolonged disruption to energy supplies or shipping through the Strait of Hormuz could generate broader inflationary pressures throughout agricultural supply chains [20].

The longer-term consequences may be more significant. Higher fertilizer and energy costs can persist beyond the initial crisis because they affect input prices, transportation, processing, and other services throughout the agricultural value chain. Evidence from the United States suggests that fertilizer-related production costs had already increased by more than 20 US$ per acre by April 2026, with the full impact expected to be more pronounced in 2027 because of the timing of input purchases [21]. This suggests that the effects of the crisis could extend into the next production cycle rather than being limited to 2026.

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Table 47. Soybean production in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**440.46**	**625.49**	**185.03**	**42.01**	**646.70**	**21.21**	**3.39**
Brunei	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Cambodia	47.68	21.07*	-26.61	-55.80	33.95*	12.88	61.10
Indonesia	78.69	221.18	142.48	181.06	220.45	-0.73	-0.33
Lao PDR	32.89	40.44	7.55	22.95	40.50	0.06	0.15
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	223.34	284.18	60.84	27.24	293.26	9.08	3.20
Philippines	0.51	0.51*	0.00	-0.41	0.57*	0.06	12.84
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	14.06	13.68	-0.38	-2.70	13.53	-0.15	-1.08
Vietnam	43.30	44.44	1.14	2.63	44.44	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 48. Soybean planted area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**266.80**	**433.45**	**166.65**	**62.46**	**468.42**	**34.97**	**8.07**
Brunei	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Cambodia	22.98	18.10*	-4.88	-21.24	18.25*	0.15	0.83
Indonesia	45.56	188.78	143.22	314.34	219.67	30.89	16.36
Lao PDR	14.84	16.15	1.31	8.83	16.90	0.75	4.64
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	148.43	175.08	26.65	17.95	178.45*	3.37	1.93
Philippines	0.38*	0.39*	0.01	2.39	0.40*	0.01	2.56
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	8.42	8.14	-0.28	-3.37	7.93	-0.20	-2.49
Vietnam	26.19	26.81	0.62	2.37	26.81	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 49. Soybean harvested area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**266.05**	**433.39**	**167.34**	**62.90**	**468.40**	**35.01**	**8.08**
Brunei	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Cambodia	22.82	18.10*	-4.72	-20.68	18.25*	0.15	0.83
Indonesia	45.56	188.78	143.22	314.34	219.67	30.89	16.36
Lao PDR	14.84	16.15	1.31	8.83	16.90	0.75	4.64
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	147.86	175.06	27.20	18.40	178.45*	3.39	1.94
Philippines	0.38	0.39*	0.01	2.39	0.40*	0.01	2.56
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	8.40	8.10	-0.30	-3.56	7.92	-0.18	-2.25
Vietnam	26.19	26.81	0.62	2.37	26.81	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 50. Soybean yield in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**1.66**	**1.44**	**-0.21**	**-12.83**	**1.38**	**-0.06**	**-4.34**
Brunei	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Cambodia	2.09	1.16*	-0.93	-44.27	1.86	0.70	59.78
Indonesia	1.73	1.17	-0.56	-32.17	1.00	-0.17	-14.35
Lao PDR	2.22	2.50	0.29	12.98	2.40	-0.11	-4.30
Malaysia	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Myanmar	1.51	1.62	0.11	7.47	1.64*	0.02	1.23
Philippines	1.33	1.30*	-0.04	-2.73	1.43*	0.13	10.02
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1.67	1.69	0.01	0.90	1.71	0.02	1.19
Vietnam	1.65	1.66	0.00	0.26	1.66	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 51. Soybean damaged area in ASEAN countries by cause of damage in 2026.

Unit: hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	**21**	**39**	**0**	**0**	**0**	**160**	**220**
Brunei	0	0	0	0	0	0	0
Cambodia	0	0	0	0	0	160	160
Indonesia	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0
Myanmar	21	0	0	0	0	0	21
Philippines	0	0	0	0	0	0	0
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	0	39	0	0	0	0	39
Vietnam	0	0	0	0	0	0	0

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 52. Soybean balance sheet of ASEAN countries in 2025.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**508,025**	**440,465**	**10,371,167**	**11,319,657**	**10,623,522**	**138,931**	**557,204**	**11,319,657**
Brunei	0	0	783	783	783	0	0	783
Cambodia	0*	47,680*	16,433*	64,113	15,322*	48,791*	0*	64,113
Indonesia	313,665	78,693	2,558,207	2,950,566	2,686,763	3,125	260,678	2,950,566
Lao PDR	58,229	32,892	15,738	106,859	7,313	67,844	31,701	106,859
Malaysia	0	0	719,890	719,890	711,028*	8,862	0	719,890
Myanmar	19,093	223,337	632	243,062	187,021	5	56,036	243,062
Philippines	15,215*	508	147,000*	162,723	141,000*	0	21,723*	162,723
Singapore	0	N/P	21,652	21,652	21,614	38	0	21,652
Thailand	0	14,055	4,282,104	4,296,159	4,295,918	241	0	4,296,159
Vietnam	101,823	43,300	2,608,728	2,753,851	2,556,759	10,025	187,066	2,753,851

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 53. Soybean balance sheet of ASEAN countries in 2026.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**557,204**	**625,493**	**11,189,773**	**12,372,470**	**11,381,431**	**146,235**	**844,803**	**12,372,470**
Brunei	0	0	806	806	806	0	0	806
Cambodia	0*	21,075*	46,836*	67,911	16,090*	51,821*	0*	67,911
Indonesia	260,678	221,177	2,565,541	3,047,396	2,752,575	2,933	291,888	3,047,396
Lao PDR	31,701	40,440	12,586	84,727	7,257	71,575	5,895	84,727
Malaysia	0	0	710,398*	710,398	701,398*	9,000*	0	710,398
Myanmar	56,036	284,179	671*	340,886	190,040	0	150,846	340,886
Philippines	21,723*	506*	128,000*	150,229	145,000*	0*	5,229*	150,229
Singapore	0	N/P	16,800	16,800	16,782	18	0	16,800
Thailand	0	13,676	4,300,000	4,313,676	4,313,476	200	0	4,313,676
Vietnam	187,066	44,440	3,408,135	3,639,641	3,238,007	10,688	390,946	3,639,641

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 54. Soybean balance sheet of ASEAN countries in 2027.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**844,803**	**576,387**	**11,489,277**	**12,910,467**	**11,613,036**	**149,001**	**1,148,431**	**12,910,467**
Brunei	0	0	831	831	831	0	0	831
Cambodia	0.09*	33,952*	32,060*	66,012	15,706*	50,306*	0*	66,012
Indonesia	291,888	150,135	2,600,022	3,042,044	2,769,875	2,899	269,271	3,042,044
Lao PDR	5,895	40,500	36,066*	82,461	7,154	75,307	0	82,461
Malaysia	0	0	715,841*	715,841	706,841*	9,000*	0	715,841
Myanmar	150,846	293,261*	670*	444,777	192,048*	0	252,729	444,777
Philippines	5,229*	571*	137,500*	143,300	141,000*	0	2,300*	143,300
Singapore	0	N/P	19,226	19,226	19,198	28	0	19,226
Thailand	0	13,528	4,323,000*	4,336,528	4,336,362	166	0	4,336,528
Vietnam	390,946	44,440	3,624,062	4,059,448	3,424,021	11,295	624,131	4,059,448

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 55. Ratio of soybean production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**440,464.74**	**10,623,522.12**	**4.15**	**625,492.62**	**11,381,431.31**	**5.50**	**576,386.80**	**11,613,035.55**	**4.96**
Brunei	0.00	783.00	0.00	0.00	806.00	0.00	0.00	831.00	0.00
Cambodia	47,680.00	15,322.00	311.19	21,074.65	16,090.00	130.98	33,951.75	15,706.00	216.17
Indonesia	78,693.44	2,686,763.42	2.93	221,177.00	2,752,575.00	8.04	150,135.09	2,769,875.14	5.42
Lao PDR	32,891.60	7,313.43	449.74	40,440.00	7,257.48	557.22	40,500.00	7,153.96	566.12
Malaysia	0.00	711,028.00	0.00	0.00	701,397.84	0.00	0.00	706,840.74	0.00
Myanmar	223,336.80	187,021.00	119.42	284,179.14	190,040.00	149.54	293,261.16	192,047.64	152.70
Philippines	507.91	141,000.00	0.36	505.83	145,000.00	0.35	570.79	141,000.00	0.40
Singapore	N/P	21,613.84	0.00	N/P	16,781.82	0.00	N/P	19,197.83	0.00
Thailand	14,055.00	4,295,918.00	0.33	13,676.00	4,313,476.00	0.32	13,528.00	4,336,361.96	0.31
Vietnam	43,300.00	2,556,759.44	1.69	44,440.00	3,238,007.17	1.37	44,440.00	3,424,021.29	1.30

Remarks: N/P refers to Not Planting.

Table 56. Ratio of soybean beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**508,024.86**	**10,623,522.12**	**4.78**	**557,203.92**	**11,381,431.31**	**4.90**	**844,802.84**	**11,613,035.55**	**7.27**
Brunei	0.00	783.00	0.00	0.00	806.00	0.00	0.00	831.00	0.00
Cambodia	0.00	15,322.00	0.00	0.00	16,090.00	0.00	0.09	15,706.00	0.00
Indonesia	313,665.00	2,686,763.42	11.67	260,677.62	2,752,575.00	9.47	291,887.55	2,769,875.14	10.54
Lao PDR	58,229.27	7,313.43	796.20	31,701.45	7,257.48	436.81	5,894.55	7,153.96	82.40
Malaysia	0.00	711,028.00	0.00	0.00	701,397.84	0.00	0.00	706,840.74	0.00
Myanmar	19,093.00	187,021.00	10.21	56,035.80	190,040.00	29.49	150,845.94	192,047.64	78.55
Philippines	15,215.00	141,000.00	10.79	21,722.91	145,000.00	14.98	5,228.74	141,000.00	3.71
Singapore	0.00	21,613.84	0.00	0.00	16,781.82	0.00	0.00	19,197.83	0.00
Thailand	0.00	4,295,918.00	0.00	0.00	4,313,476.00	0.00	0.00	4,336,361.96	0.00
Vietnam	101,822.59	2,556,759.44	3.98	187,066.15	3,238,007.17	5.78	390,945.98	3,424,021.29	11.42

Table 57. Quantity and value of soybean exports by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	20	16,123	774.76	255,870	72	42,577	847	298,448
	Singapore	0.0049	45						
	Timor-Leste	755	239,702						
Lao PDR	-	0	0	0	0	54,273	20,591,688	54,273	20,591,688
Malaysia	Indonesia	1,274	757,710	1,302	795,720	0	0	1,302	795,720
	Singapore	28	38,010						
Myanmar	-	0	0	0	0	0	0	0	0
Philippines	-	0	0	0	0	0	0	0	0
Singapore	-	0	0	0	0	0	0	0	0
Thailand	Cambodia	74	88,018	66,879	60,106,102	15,776	18,573,133	82,655	78,679,235
	Indonesia	4,600	5,048,500						
	Lao PDR	18,420	9,211,386						
	Malaysia	966	1,180,447						
	Myanmar	17,196	13,943,349						
	Philippines	11,100	13,397,748						
	Singapore	198	260,507						
	Vietnam	14,325	16,976,147						
Vietnam	Cambodia	N/A	1,669,217	N/A	1,679,792	N/A	17,444	N/A	1,697,236
	Lao PDR	N/A	10,575						

Remarks: N/A refers to Not Available.

The hyphen (-) indicates no country destination's export.

Table 58. Quantity and value of soybean imports by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	Malaysia	193	208,911	193	208,911	614	665,922	806	874,833
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	897	467,265	897	467,265	720,060	345,548,981	720,957	346,016,245
Lao PDR	Thailand	1,899	696,125	10,113	4,000,564	11,556	4,630,844	21,669	8,631,408
	Vietnam	8,214	3,304,439						
Malaysia	-	0	0	0	0	100,694	50,991,881	100,694	50,991,881
Myanmar	-	0	0	0	0	0	0	0	0
Philippines	-	0	0	0	0	31,145	15,446,016	31,145	15,446,016
Singapore	Indonesia	3	12,482	108	506,312	16,692	12,669,213	16,800	13,175,525
	Malaysia	102	485,358						
	Myanmar	2.11	7,298						
	Thailand	0.29	1,175						
Thailand	Cambodia	1,250	557,167	592,140	233,096,566	1,333,712	593,413,030	1,925,852	826,509,596
	Indonesia	0.002	24						
	Malaysia	453	829,340						
	Vietnam	590,437	231,710,035						
Vietnam	Cambodia	3,486	2,457,960	3,486	2,457,960	1,216,446	578,295,519	1,219,932	580,753,479

Remarks: N/A refers to Not Available.

The hyphen (-) indicates no country destination's import.

Table 59. FOB prices of soybean in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS code 12019000	2025	256	431	434	283	356	397	288	551	229	510	50	483	356
		2026	317	541	336	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	398
Lao PDR	Grade A	2025	380	380	380	381	500	380	500	380	374	355	420	500	411
		2026	380	371	383	380	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	379
Malaysia	HS code 1201100000	2025	529	579	574	570	591	583	579	596	599	542	596	580	577
		2026	586	605	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	596
	HS code 1201900000	2025	879	943	1,005	1,169	739	1,260	889	3,203	1,741	780	880	848	1,195
		2026	1,193	3,313	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,253
Myanmar	Not specified	2025	0	0	0	0	0	796	0	1000	0	0	0	0	898
		2026	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Remarks: N/A refers to Not Available.

Table 60. CIF prices of soybean in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	HS code 12019000	2025	464	464	451	470	452	457	466	469	467	465	465	469	463
		2026	476	489	474	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	480
Lao PDR	A Grade	2025	426	430	448	442	441	391	400	382	414	425	381	370	413
		2026	401	455	397	312	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	391
Malaysia	HS code 1201100000	2025	465	459	465	480	470	468	459	481	465	474	477	481	470
		2026	498	484	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	491
	HS code 1201900000	2025	480	475	476	456	500	506	502	516	505	518	524	579	503
		2026	532	564	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	548
Myanmar	HS code 1201900000	2025	0	0	0	1,409	0	1,413	1,408	1,413	0	0	0	1,405	1,410
		2026	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Philippines	Not specified 1	2025	443	443	443	436	423	425	426	0	453	452	457	0	440
		2026	445	441	446	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	444
	Not specified 2	2025	499	552	532	520	590	581	572	542	565	506	522	532	543
		2026	504	512	536	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	517
Singapore	Not specified	2025	848	825	806	822	783	759	755	758	747	791	757	739	783
		2026	780	769	788	796	785	775	757	764	733	731	752	702	761
Thailand	Not specified	2025	469	470	446	432	429	439	438	456	452	453	462	475	452
		2026	481	479	465	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	475
Vietnam	Not specified	2025	463	458	443	444	474	452	474	476	479	476	473	466	465
		2026	467	483	478	477	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	476

Remarks: N/A refers to Not Available.

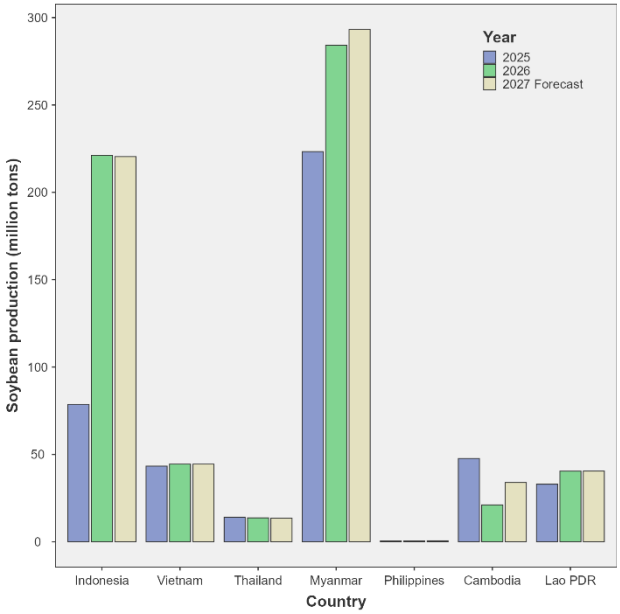


Figure 46. Soybean production of selected countries in ASEAN from 2025 to 2027.

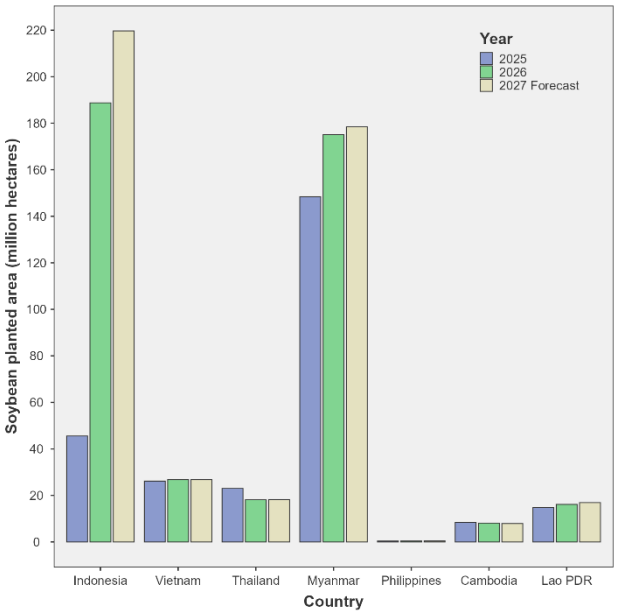


Figure 47. Soybean planted area of selected countries in ASEAN from 2025 to 2027.

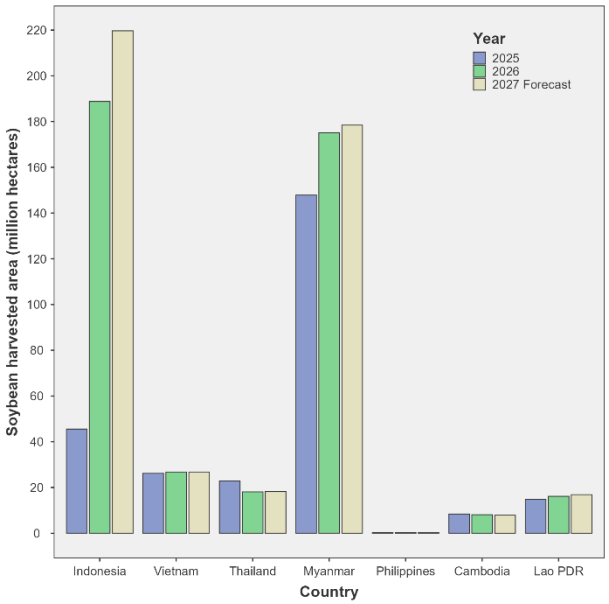


Figure 48. Soybean harvested area of selected countries in ASEAN from 2025 to 2027.

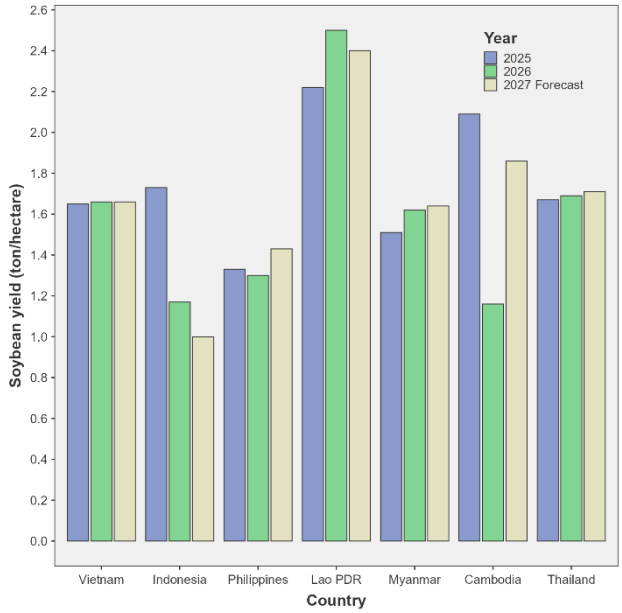


Figure 49. Soybean yield of selected countries in ASEAN from 2025 to 2027.

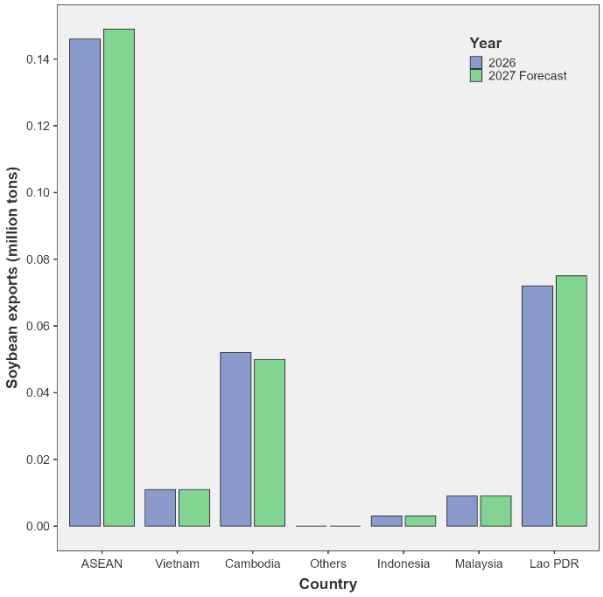


Figure 50. Amount of soybean exports of selected countries in ASEAN from 2026 to 2027.

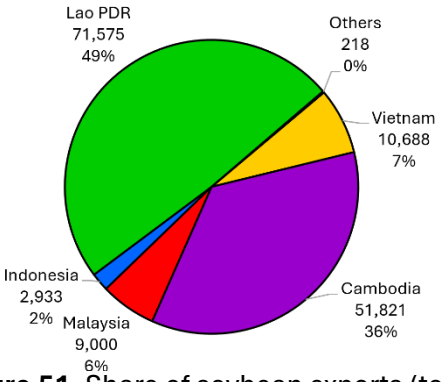


Figure 51. Share of soybean exports (tons) among ASEAN countries in 2026, totaling 146,235 tons.

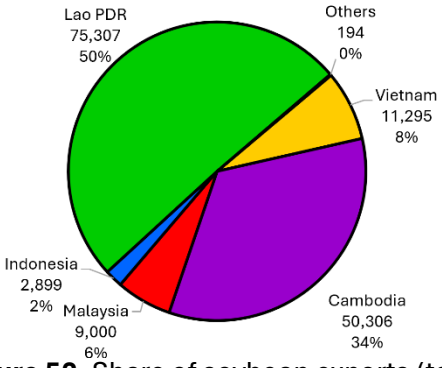


Figure 52. Share of soybean exports (tons) among ASEAN countries in 2027, totaling 149,001 tons.

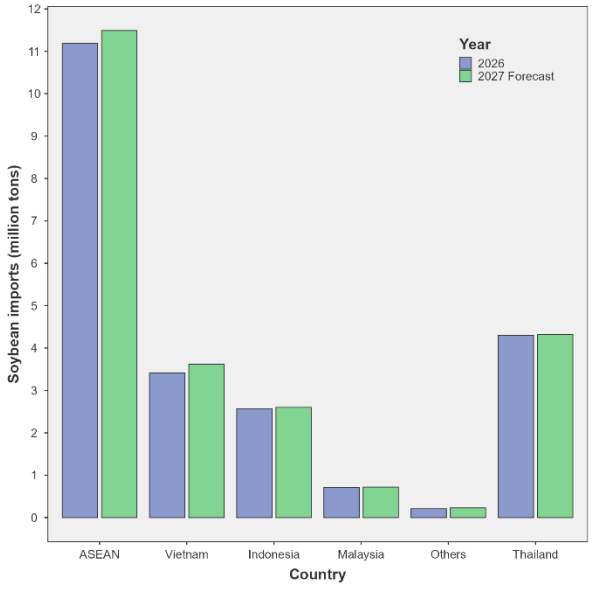


Figure 53. Amount of soybean imports of selected countries in ASEAN from 2026 to 2027.

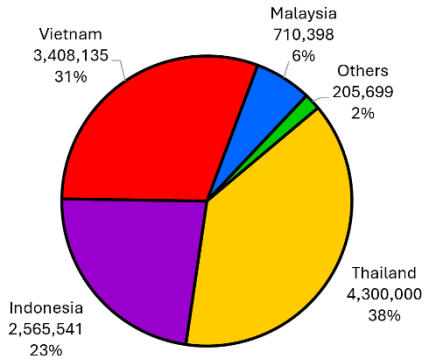


Figure 54. Share of soybean imports (tons) among ASEAN countries in 2026, totaling 11.19 million tons.

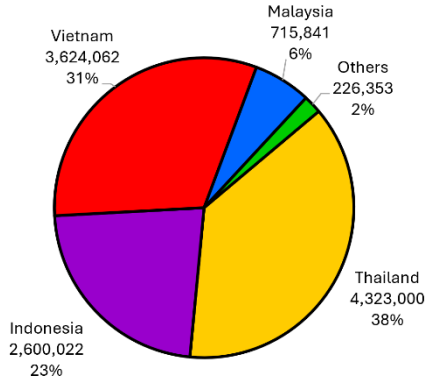


Figure 55. Share of soybean imports (tons) among ASEAN countries in 2027, totaling 11,49 million tons.

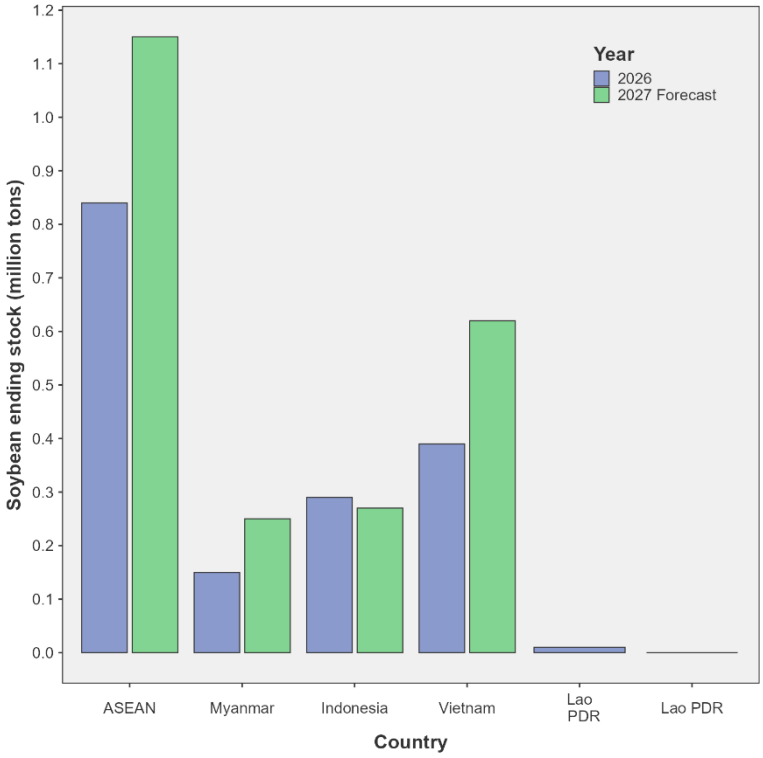


Figure 56. Amount of ending stock of soybean in ASEAN from 2026 to 2027.

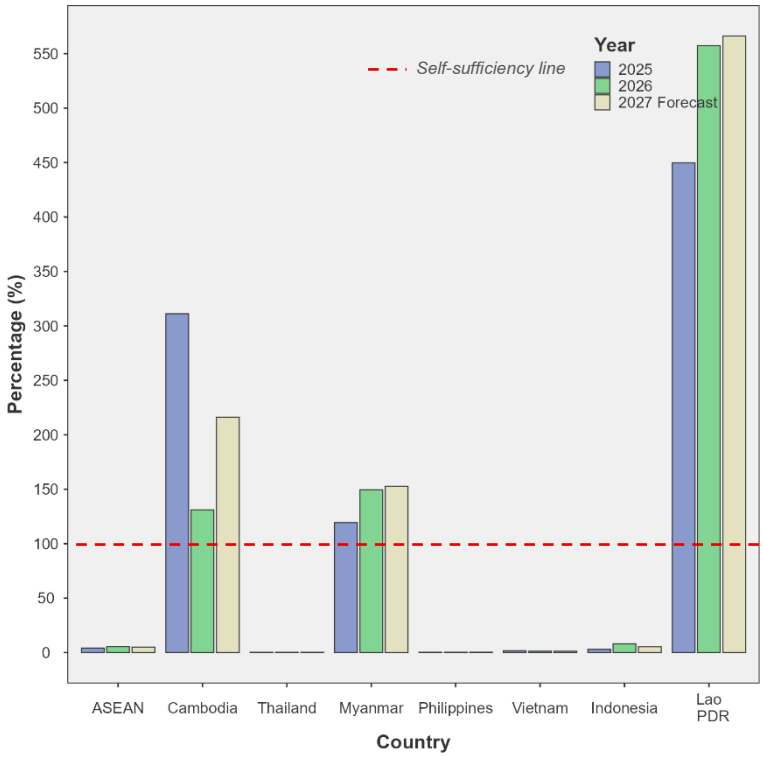


Figure 57. Ratio of soybean production to domestic utilization in ASEAN from 2025 to 2027.

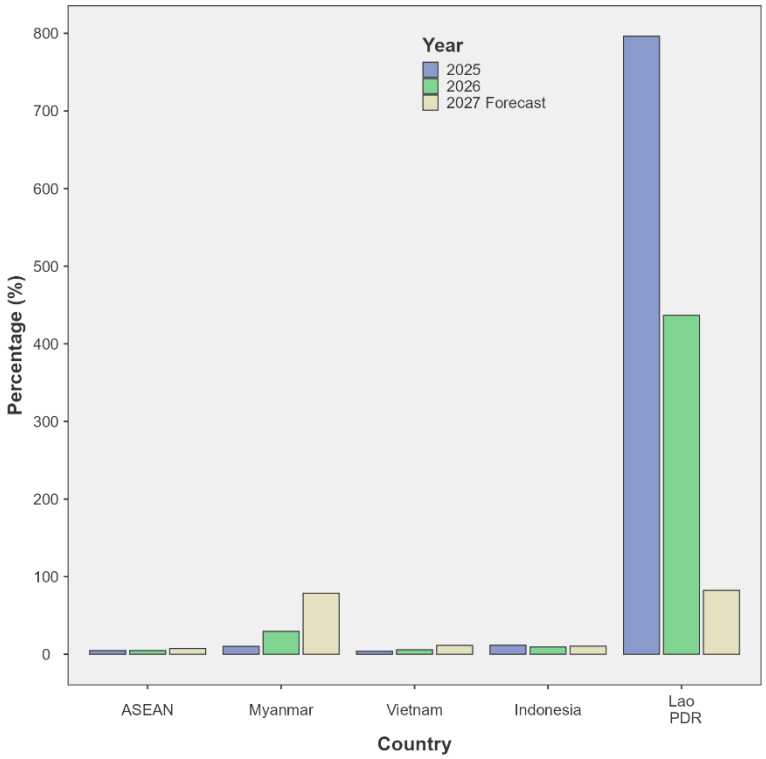


Figure 58. Ratio of soybean beginning stock to domestic utilization in ASEAN from 2025 to 2027.

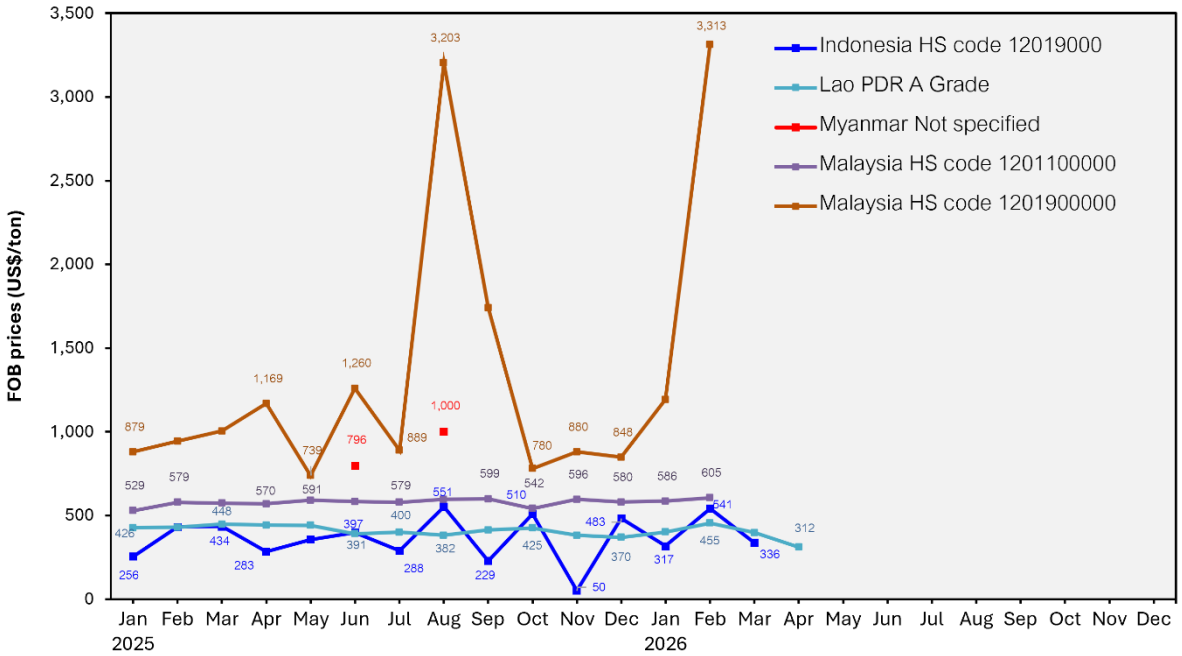


Figure 59. FOB prices (US$/ton) of soybean of selected countries in ASEAN from 2025 to 2026.

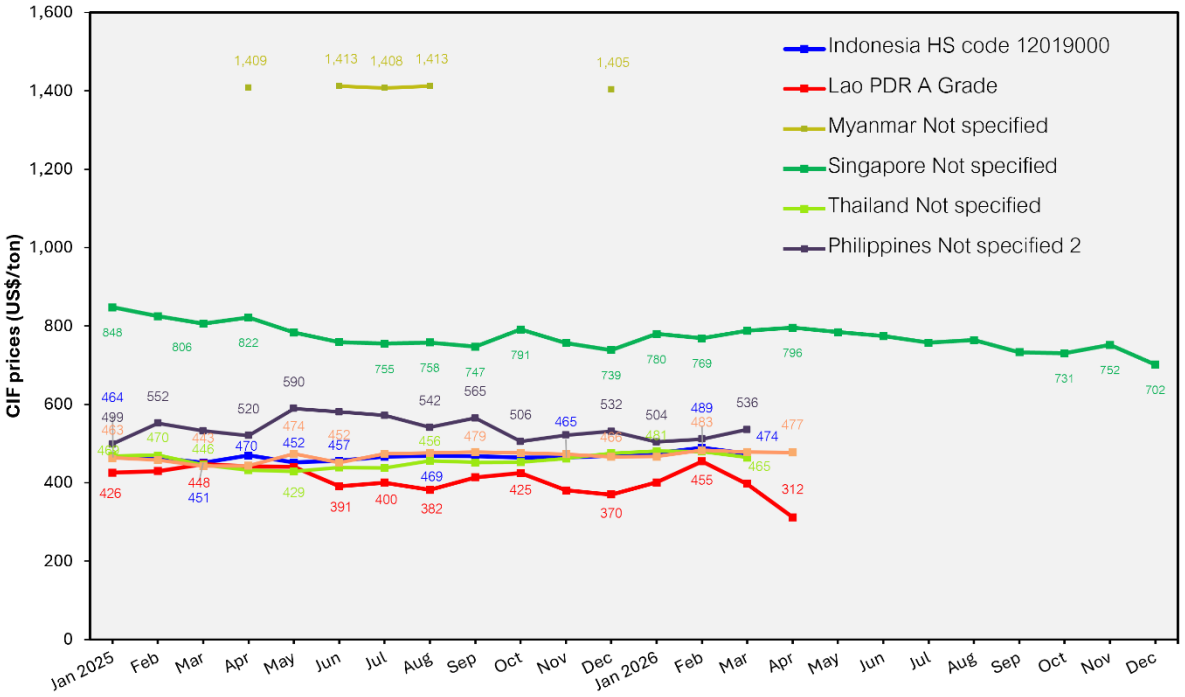


Figure 60. CIF prices (US$/ton) of soybean of selected countries in ASEAN from 2025 to 2026.

Cassava Outlook for 2027

Highlights

The forecast for the supply of cassava in ASEAN indicates an increase from 105.51 million tons in 2026 to 108.67 million tons in 2027, increasing 3.16 million tons (2.99 percent increases) (Table 61). This increases in supply are primarily influenced by increases in the beginning stock, while small increases in production, and import. The beginning stock is estimated at 22.17 million tons in 2027, increasing 2.67 million tons (13.69 percent increases) from 19.50 million tons in 2026. Cassava production for 2027 is estimated at 77.37 million tons, an increase from 77.20 million tons in 2026. Additionally, the import of cassava is forecast to increase by 0.32 million tons (3.63 percent increases) from 8.81 million tons in 2026 to 9.13 million tons in 2027.

The increase in demand for cassava is attributed to the ending stock. Meanwhile, the decreases are observed in the domestic utilization and export. The domestic utilization is forecast to be 49.63 million tons in 2027, decreasing 0.17 million tons (0.34 percent decreases) from 49.80 million tons in 2026. The export is forecast to decrease by 1.54 million tons (4.59 percent decreases) from 33.54 million tons in 2026 to 32.00 million tons in 2027. The ending stock is expected to increase by 4.87 million tons (21.97 percent increases) from 22.17 million tons in 2026 to 27.04 million tons in 2027.

The production to domestic utilization ratio (self-sufficiency ratio) in 2027 is estimated to be 155.89 percent, which increase from 155.00 percent in 2026. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 44.66 percent in 2027, showing an increase from 39.15 percent in 2026.

Table 61. Summary of the ASEAN cassava situation from 2026 to 2027.

Unit: Million tons

Items	2026	2027	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	105.51	108.67	3.16	2.99
Beginning stock	19.50	22.17	2.67	13.69
Production	77.20	77.37	0.17	0.22
Import	8.81	9.13	0.32	3.63
Demand (Million tons)	105.51	108.67	3.16	2.99
Domestic utilization	49.80	49.63	-0.17	-0.34
Export	33.54	32.00	-1.54	-4.59
Ending stock	22.17	27.04	4.87	21.97
Ratio of production to domestic utilization (%)	155.00	155.89	-	-
Ratio of beginning stock to domestic utilization (%)	39.15	44.66	-	-

ASEAN Cassava Situation in 2026

Production

In 2026 (crop year 2025/2026), cassava (fresh root) production in ASEAN is at 77.20 million tons, decreasing 2.87 million tons, (3.58 percent decreases) from the 80.06 million tons recorded in 2025. A decrease in production is observed in Brunei Darussalam, Cambodia, Lao PDR, Myanmar, the Philippines, and Thailand. However, an increase in cassava production is observed in Indonesia, Malaysia, and Vietnam (Tables 62–65 and Figures 61–64).

For Brunei in 2026, the increase in production is attributed to the increase in yield, which is driven by favorable weather conditions, farmers using more fertilizer, and improving crop management.

For Indonesia in 2026, the increases in production are attributed to the expansion in planted area. The increase in planted area is driven by the rising cassava prices and favorable weather conditions. Meanwhile, the yield decreases due to applying less fertilizer.

For Lao PDR in 2026, the decrease in production is attributed to the reduction in yield. The expansion in planted area is driven by rising cassava prices and supportive government policies. The yield is decreased due to farmers applying less fertilizer and soil degradation.

For Myanmar in 2026, the production is decrease, attributing to the reductions in both planted area and yield. The decrease in planted area is driven by rising prices of competing crops. Similarly, the decrease in yield is influenced by improperly fertilizer use.

For the Philippines in 2026, the decrease in soybean production is primarily attributed to a reduction in yield. The decline in yield is mainly due to natural damage caused by flooding and pest infestations. Meanwhile, the harvested area is expected to increase, driven by sustained demand from traders and local consumers.

For Thailand in 2026, the decrease in cassava production is attributed to reductions in both the planted area and yield. The decline in planted area is driven by lower cassava prices, higher prices of competing crops, and shortages of planting stocks. Meanwhile, cassava yield is declined due to excessive rainfall during the root bulking stage, which may cause root rot. Low-lying areas may also experience prolonged waterlogging, resulting in plant mortality. In addition, the continued spread of diseases and pests, particularly cassava mosaic disease, mealybugs, and witches' broom disease, is adversely affected cassava productivity.

For Vietnam in 2026, the increase in cassava production is attributed to an expansion in the planted area, driven by higher export demand. Meanwhile, cassava yield is expected to remain unchanged from the previous year.

Utilization and Stock

In 2026, the domestic utilization in ASEAN is 49.80 million tons, decreasing 0.38 million tons (0.76 percent decreases) from 50.19 million tons in 2025 (Tables 67–68). The beginning stock is 48.20 million tons, increasing 29.18 million tons (153.45 percent increases) from 19.02 million tons in 2026. The ending stock in 2026 is 73.87 million tons, increasing 25.67 million tons (53.26 percent decreases) from 48.20 million tons in 2025.

The ratio of production to domestic utilization (self-sufficiency ratio) in 2026 decreases to 155.00 percent in 2026, down from 159.54 percent in 2025 (Table 70, Figure 72).

The ratio of ASEAN's beginning stock to domestic utilization (food security ratio) in 2026 is 96.77 percent in 2026, up from 37.89 percent in 2025 (Table 71, Figure 73).

Trade

ASEAN's cassava exports in 2026 total 33.54 million tons, decreasing 6.49 million tons (16.22 percent decreases) from 40.03 million tons in 2025. ASEAN's cassava import in 2026 is 8.81 million tons, decreasing 1.82 million tons (17.12 percent decreases) from 10.63 million tons in 2025 (Tables 67–68, Figures 65–66, and 68–69).

The quantity and value of cassava exports by country of destination and the quantity and value of cassava imports by country of origin are provided in Table 72 and 73, respectively.

Prices

The FOB prices of cassava in Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Thailand, and Vietnam for the years 2025 and 2026, along with the CIF prices in Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, and Singapore, are provided in Tables 74–75.

Damage Area

The total damaged area of the cassava crop in ASEAN in 2026 is 87,391 hectares. The most causes of damage are diseases, which amounts 64,000 hectares in Thailand (Table 51).

Prospects for Cassava in 2027

Production

The forecast for cassava production in ASEAN in 2027 anticipates a total of 77,37 million tons, increasing 0.18 million tons (0.23 percent decreases) from 77.20 million tons in 2026. Increases in production are observed in Cambodia, Lao PDR, Malaysia, Myanmar, the Philippines, and Vietnam. On the other hand, decreases in cassava production are expected in Indonesia and Thailand (Tables 62–65, Figures 61–64).

For Brunei Darussalam in 2027, the production is expected to increase, which results from favorable weather conditions, farmers applying more fertilizer, and improving crop management

For Indonesia in 2027, cassava production is expected to decrease due to reductions in both the planted area and yield. The decline in planted area is influenced by rising prices of competing crops and increased competition from other commodities, particularly food crops and horticultural crops, which are supported by favorable weather conditions. Meanwhile, cassava yield is expected to decline due to reduced fertilizer application.

For Lao PDR in 2027, the production is expected to increase due to expansions in both planted area and yield. The increase in planted area is driven by rising cassava prices and supportive government policies. Additionally, yield is also expected to increase due to using the high yield of cassava varieties and fertilizer sufficiency.

For Thailand in 2027, cassava production is expected to reduce attributing to the reduction in yield. The reduction is driven by drought condition and plant disease. However, the planted area is expected to increase due to rising cassava prices and declining prices of competing crops.

For Vietnam in 2027, the production is expected to increase due to the expansion in the planted area, which is driven by higher export demand. Meanwhile, cassava yield is expected to remain unchanged from the previous year.

Utilization and Stock

The forecast for the domestic utilization of cassava in 2027 anticipates a decrease to 49.63 million tons, decreasing 0.17 million tons (0.35 percent decreases) compared to 49.80 million tons in 2026. The beginning stock for 2027 is forecast to increase at 73.87 million tons, increasing 25.67 million tons (53.26 percent increases) from 48.20 million tons in 2026. The ending stock for 2027 is expected to be 99.74 million tons, indicating an increase of 25.88 million tons (35.03 percent increases) from 73.87 million tons in 2026 (Tables 68–69).

The forecast for the ratio of production to domestic utilization (self-sufficiency ratio) in 2027 is expected to be 155.89 percent, showing an increase from 155.00 percent in 2026 (Table 70, Figure 72). In terms of *the ratio of beginning stock to domestic utilization (food security ratio) in 2027*, it is estimated to be 148.83 percent, representing an increase from 96.77 percent in 2026 This indicates a strengthening of the cassava supply situation in 2027 (Table 71, Figure 73).

Trade

The forecast for cassava fresh root exports from ASEAN in 2027 indicates a decrease to 32.00 million tons, decreasing 1.54 million tons (4.60 percent decreases) from 33.54 million tons in 2026. Additionally, imports are estimated to increase to 9.13 million

tons in 2027, increasing 0.32 million tons (3.60 percent increases) from 8.81 million tons in 2026 (Tables 68–69, Figures 65, 67, 69–70).

Summary

Cassava remains an important global crop for food, animal feed, starch, ethanol, and other industrial applications. Globally, cassava is widely cultivated in tropical regions, with Africa accounting for the largest share of production, followed by Asia. According to FAO, cassava is considered a key climate-resilient crop due to its ability to grow in marginal soils and under drought conditions, making it an important staple and industrial raw material in developing economies [22]. In ASEAN, Thailand and Vietnam are the main exporters, playing a significant role in the global cassava starch and chip markets. China remains the dominant import destination for ASEAN cassava products, making regional demand highly sensitive to changes in Chinese industrial demand and policy shifts [23,24].

In 2026, ASEAN cassava production is estimated at 77.20 million tons, down 3.58 percent from 2025. The decline is mainly associated with reduced planted area and lower yields in several countries, particularly Thailand, Myanmar, Lao PDR, and the Philippines. In Thailand, excessive rainfall, disease and pest outbreaks, shortages of planting materials, and competition from alternative crops have constrained production [23,24]. FAO highlights that while cassava is generally drought-tolerant, it is highly sensitive to waterlogging and poor drainage conditions, which can significantly reduce root development and yield stability [22]. In contrast, production in Vietnam and Indonesia increased, supported by stronger prices and export demand. Vietnam has also experienced strong cassava prices, with firm demand from China and the starch and ethanol industries supporting farmers' income prospects [25].

Despite lower production, the ASEAN supply situation remains relatively adequate. The regional SSR is 155.00 percent and FSR is 39.15 percent in 2026, indicating that beginning stocks cover approximately two-fifths of domestic utilization. In 2027, production is forecast to increase slightly to 77.37 million tons, while the SSR is expected to rise to 155.89 percent and the FSR to 44.66 percent, indicating a modest improvement in stock-based supply security. Meanwhile, ASEAN cassava exports are expected to decline from 33.54 million tons in 2026 to 32.00 million tons in 2027, suggesting that regional trade may remain under pressure despite relatively adequate domestic supply.

Globally, cassava demand is expected to continue expanding, driven by food processing, animal feed, starch, biofuel, and other industrial applications [22,26]. FAO further emphasizes cassava’s role in food security and industrial transformation, particularly in developing countries where it serves both as a staple food and a raw material for value-added processing industries [22]. However, ASEAN exporters remain exposed to market concentration risks, particularly dependence on China. Diversification toward higher-value products such as modified starch, bioethanol, and processed cassava-based ingredients, as well as expansion into alternative markets, could improve the resilience of the regional cassava value chain [27].

Climate and crisis risks remain major concerns for cassava production systems. Drought associated with El Niño, excessive rainfall, disease, and pest outbreaks can reduce yields and disrupt supply chains. Evidence from studies shows that climate change may significantly alter cassava suitability zones and increase the distribution of major pests such as *Bemisia tabaci*, thereby intensifying disease pressure in vulnerable regions [28]. In addition, cassava brown streak disease and cassava mosaic disease continue to threaten productivity in tropical production systems, particularly where planting material is not properly managed [29,31]. Research also indicates that cassava, while relatively resilient, is not immune to climate stress, and yield stability can be significantly affected by extreme weather variability and shifting rainfall patterns [30].

Furthermore, genetic improvement and biotechnology-based approaches are increasingly recognized as important strategies for enhancing cassava resistance to diseases and environmental stress. Studies highlight ongoing efforts to engineer disease-resistant cassava varieties and improve productivity under climate change scenarios [32]. Community-based phytosanitation and the use of clean planting materials have also been shown to be effective in reducing disease spread and maintaining yield stability in smallholder systems [31].

Overall, the ASEAN cassava outlook remains relatively stable but requires continued monitoring. However, the sector remains vulnerable to climate variability, disease and pest outbreaks, planting stock constraints, and dependence on major export markets. Strengthening climate-resilient varieties, improving disease management systems, enhancing supply chain efficiency, and diversifying export markets and value-added cassava products will be essential for sustaining the long-term competitiveness and resilience of the ASEAN cassava sector.

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Table 62. Cassava production in ASEAN countries from 2025 to 2027.

Unit: 1,000 tons

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**80,064.55**	**77,195.83**	**-2,868.71**	**-3.58**	**77,370.96**	**175.13**	**0.23**
Brunei	0.34	0.33	-0.01	-3.22	0.34	0.02	5.00
Cambodia	15,955.36	14,986.70*	-968.66	-6.07	15,715.80*	729.09	4.86
Indonesia	16,407.05	17,040.28	633.23	3.86	16,445.32	-594.97	-3.49
Lao PDR	7,738.50	7,685.00	-53.50	-0.69	7,731.50	46.50	0.61
Malaysia	39.82	40.30	0.48	1.20	40.78	0.48	1.20
Myanmar	366.57	352.49	-14.08	-3.84	370.19*	17.70	5.02
Philippines	2,377.01	2,358.92*	-18.09	-0.76	2,388.99*	30.07	1.27
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	26,941.00	24,185.74	-2,755.25	-10.23	24,026.52	-159.23	-0.66
Vietnam	10,238.90	10,546.07	307.17	3.00	10,651.53	105.46	1.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 63. Cassava planted area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**3,831.13**	**3,859.50**	**28.37**	**0.74**	**3,897.76**	**38.26**	**0.99**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	774.84	792.14*	17.30	2.23	805.06*	12.92	1.63
Indonesia	547.25	603.30	56.04	10.24	603.18	-0.12	-0.02
Lao PDR	304.51	305.00	0.49	0.16	305.50	0.50	0.16
Malaysia	2.41	2.63	0.22	8.93	2.71	0.08	3.00
Myanmar	22.59	21.63	-0.96	-4.26	22.51*	0.88	4.07
Philippines	271.80*	272.44*	0.64	0.24	273.09*	0.65	0.24
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1,408.63	1,348.29	-60.33	-4.28	1,366.50	18.20	1.35
Vietnam	499.10	514.07	14.97	3.00	519.21	5.14	1.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 64. Cassava harvested area in ASEAN countries from 2025 to 2027.

Unit: 1,000 hectares

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**3,780.79**	**3,772.11**	**-8.68**	**-0.23**	**3,803.90**	**31.79**	**0.84**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	773.85	792.14*	18.29	2.36	805.06*	12.92	1.63
Indonesia	547.25	603.30	56.04	10.24	603.18	-0.12	-0.02
Lao PDR	304.39	305.00	0.61	0.20	305.50	0.50	0.16
Malaysia	2.12	2.35	0.23	10.71	2.42	0.07	3.00
Myanmar	22.17	21.63	-0.54	-2.45	22.51*	0.88	4.07
Philippines	271.80	272.44*	0.64	0.24	273.09*	0.65	0.24
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	1,360.11	1,261.19	-98.92	-7.27	1,272.93	11.74	0.93
Vietnam	499.10	514.07	14.97	3.00	519.21	5.14	1.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 65. Cassava yield in ASEAN countries from 2025 to 2027.

Unit: ton/hectare

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**21.18**	**20.46**	**-0.72**	**-3.40**	**20.34**	**-0.12**	**-0.59**
Brunei	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cambodia	20.62	18.92*	-1.70	-8.24	19.52*	0.60	3.17
Indonesia	29.98	28.25	-1.73	-5.77	27.26	-0.99	-3.50
Lao PDR	25.42	25.20	-0.22	-0.87	25.31	0.11	0.44
Malaysia	18.79	17.17	-1.62	-8.62	16.87	-0.30	-1.75
Myanmar	16.53	16.30	-0.23	-1.39	16.45	0.15	0.92
Philippines	8.75	8.66*	-0.09	-1.03	8.75*	0.09	1.04
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	19.81	19.18	-0.63	-3.18	18.88	-0.30	-1.56
Vietnam	20.51	20.51	0.00	0.00	20.51	0.00	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 66. Cassava damaged area in ASEAN countries by cause of damage in 2026.

Unit: hectare

Country	Cause of damage						
	Flood	Drought	Pest	Disease	Other	Unspecified	Total
ASEAN	**0**	**23,107**	**0**	**64,000**	**0**	**284**	**87,391**
Brunei	0	0	0	0	0	0	0
Cambodia	0	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	284	284
Myanmar	0	0	0	0	0	0	0
Philippines	0	0	0	0	0	0	0
Singapore	N/P	N/P	N/P	N/P	N/P	N/P	N/P
Thailand	0	23,107	0	64,000	0	0	87,107
Vietnam	0	0	0	0	0	0	0

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 67. Cassava balance sheet of ASEAN countries in 2025 (cassava fresh root).

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**19,016,524**	**80,064,489**	**10,634,523**	**109,715,536**	**50,186,126**	**40,031,488**	**19,497,921**	**109,715,535**
Brunei	0	336	0.14	336	336	0	0	336
Cambodia	11,329,027*	15,955,360*	0*	27,284,387	9,008,638*	2,146,822*	16,128,928*	27,284,387
Indonesia	0	16,407,052	701,534	17,108,586	16,896,855	211,731	0	17,108,586
Lao PDR	1,107,311	7,738,500	51,353	8,897,164	3,602,861	4,756,939	537,364.64	8,897,164
Malaysia	0	39,819	6,695	46,514	45,740*	774	0	46,514
Myanmar	1,101,732	366,570	1,463	1,469,765	231,918	218,810	1,019,037	1,469,765
Philippines	0	2,377,011	100,789	2,477,800	2,476,489*	1,311	0	2,477,800
Singapore	0	0	1,524	1,524	1,523	1	0	1,524
Thailand	4,588,573*	26,940,941	9,400,000	40,929,514	10,700,000	28,700,000	1,529,514	40,929,514
Vietnam	889,881	10,238,900	371,164	11,499,946	7,221,767	3,995,101	283,078	11,499,946

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 68. Cassava balance sheet of ASEAN countries in 2026 (cassava fresh root).

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**19,497,921**	**77,195,859**	**8,814,258**	**105,508,038**	**49,804,527**	**33,537,594**	**22,165,917**	**105,508,038**
Brunei	0	325	0.15	325	325	0	0	325
Cambodia	16,128,928*	14,986,702*	0*	31,115,630*	9,008,638*	2,146,822*	19,960,170*	31,115,630
Indonesia	0	17,040,285	374,643	17,414,928	17,082,772	332,156	0	17,414,928
Lao PDR	537,365	7,685,000	61,816	8,284,181	3,245,937	4,082,664	955,579	8,284,181
Malaysia	0	40,297	6,695	46,992	46,212	780	0	46,992
Myanmar	1,019,037	352,494	405	1,371,936	262,887	46	1,109,003	1,371,936
Philippines	0	2,358,918*	0*	2,358,918	2,358,918*	0*	0	2,358,918
Singapore	0	0	1,390	1,390	1,389	1	0	1,390
Thailand	1,529,514	24,185,771	8,000,000	33,715,285	10,700,000	23,000,000	15,285	33,715,285
Vietnam	283,078	10,546,067	369,309	11,198,453	7,097,448	3,975,126	125,880	11,198,453

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 69. Cassava balance sheet of ASEAN countries in 2027 (cassava fresh root).

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**22,165,916**	**77,370,958**	**9,132,006**	**108,668,880**	**49,631,941**	**31,995,397**	**27,041,543**	**108,668,880**
Brunei	0	341	0.17	341	341	0	0	341
Cambodia	19,960,170*	15,715,795*	0*	35,675,965	9,008,638*	2,146,822*	24,520,505*	35,675,965
Indonesia	0	16,445,315	721,958	17,167,273	16,957,863	209,410	0	17,167,273
Lao PDR	955,579	7,731,500	52,276	8,739,355	3,309,013	4,875,188	555,155	8,739,355
Malaysia	0	40,781	6,695*	47,476	46,696*	780*	0	47,476
Myanmar	1,109,003	370,191*	0*	1,479,193	253,565*	0*	1,225,628	1,479,193
Philippines	0	2,388,991*	0*	2,388,991	2,388,991*	0*	0	2,388,991
Singapore	0	0	1,457	1,457	1,456	1	0	1,457
Thailand	15,285	24,026,516	8,000,000	32,041,801	10,700,000	21,000,000	341,801	32,041,801
Vietnam	125,880	10,651,528	349,619	11,127,027	6,965,378	3,763,195	398,454	11,127,027

Remarks: * notes that the value is forecast by the AFSIS Secretariat.
N/A refers to Not Available.
N/P refers to Not Planting.

Table 70. Ratio of cassava production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**80,064,488.62**	**50,186,126.31**	**159.54**	**77,195,858.81**	**49,804,526.51**	**155.00**	**77,370,957.88**	**49,631,940.59**	**155.89**
Brunei	335.87	336.01	99.96	325.04	325.20	99.95	341.30	341.46	99.95
Cambodia	15,955,360.00	9,008,637.79	177.11	14,986,702.00	9,008,637.79	166.36	15,715,795.24	9,008,637.79	174.45
Indonesia	16,407,051.66	16,896,854.95	97.10	17,040,285.00	17,082,771.62	99.75	16,445,315.00	16,957,862.81	96.98
Lao PDR	7,738,500.00	3,602,860.69	214.79	7,685,000.00	3,245,937.34	236.76	7,731,500.00	3,309,012.74	233.65
Malaysia	39,819.00	45,740.00	87.06	40,297.00	46,212.00	87.20	40,781.00	46,696.00	87.33
Myanmar	366,570.00	231,918.00	158.06	352,493.52	262,887.00	134.09	370,190.68	253,564.86	145.99
Philippines	2,377,011.09	2,476,489.00	95.98	2,358,918.25	2,358,918.00	100.00	2,388,991.00	2,388,991.00	100.00
Singapore	N/P	1,523.31	0.00	N/P	1,389.32	0.00	N/P	1,456.32	0.00
Thailand	26,940,941.00	10,700,000.00	251.78	24,185,771.00	10,700,000.00	226.04	24,026,516.00	10,700,000.00	224.55
Vietnam	10,238,900.00	7,221,766.56	141.78	10,546,067.00	7,097,448.24	148.59	10,651,527.67	6,965,377.61	152.92

Remarks: N/P refers to Not Planting.

Table 71. Ratio of cassava beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2025 to 2027.

Unit: ton

Country	2025			2026			2027		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**19,016,524.03**	**50,186,126.31**	**37.89**	**19,497,921.06**	**49,804,526.51**	**39.15**	**22,165,916.49**	**49,631,940.59**	**44.66**
Brunei	0.00	336.01	0.00	0.00	325.20	0.00	0.00	341.46	0.00
Cambodia	11,329,027.33	9,008,637.79	125.76	16,128,927.54	9,008,637.79	179.04	19,960,169.75	9,008,637.79	221.57
Indonesia	0.00	16,896,854.95	0.00	0.00	17,082,771.62	0.00	0.00	16,957,862.81	0.00
Lao PDR	1,107,310.61	3,602,860.69	30.73	537,364.64	3,245,937.34	16.55	955,579.29	3,309,012.74	28.88
Malaysia	0.00	45,740.00	0.00	0.00	46,212.00	0.00	0.00	46,696.00	0.00
Myanmar	1,101,732.00	231,918.00	475.05	1,019,037.00	262,887.00	387.63	1,109,002.52	253,564.86	437.36
Philippines	0.00	2,476,489.00	0.00	0.00	2,358,918.00	0.00	0.25	2,388,991.00	0.00
Singapore	0.00	1,523.31	0.00	0.00	1,389.32	0.00	0.00	1,456.32	0.00
Thailand	4,588,573.00	10,700,000.00	42.88	1,529,514.00	10,700,000.00	14.29	15,285.00	10,700,000.00	0.14
Vietnam	889,881.10	7,221,766.56	12.32	283,077.88	7,097,448.24	3.99	125,879.68	6,965,377.61	1.81

Table 72. Quantity and value of cassava exports by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	2,652	982,501	3,136	1,178,636	8,435	4,150,795	11,572	5,329,432
	Philippines	482	194,043						
	Timor-Leste	1.03	737						
	Vietnam	1.05	1,355						
Lao PDR	Thailand	2,636,330	129,130,997	3,099,838	148,820,301	982,826	66,644,366	4,082,664	215,464,667
	Vietnam	463,508	19,689,304						
Malaysia	Singapore	102	54,971	102	54,971	2	13,663	103	68,634
Myanmar	Malaysia	46	0.014	46	0.014	0	0	46	0.014
Philippines	Singapore	7	37,858	8	38,335	504	677,013	512	715,348
	Vietnam	1	477	0	0	0	0	0	0
Singapore	-	0	0	0	0	0	0	0	0
Thailand	Brunei	93	68,516	157,467	89,627,218	1,305,718	556,829,767	1,463,186	646,456,985
	Cambodia	488	537,366						
	Indonesia	51,375	30,835,070						
	Lao PDR	2,560	1,368,577						
	Malaysia	55,192	26,657,369						
	Myanmar	2,611	1,668,523						
	Philippines	16,431	11,168,756						
	Singapore	18,457	9,095,137						
	Vietnam	10,260	8,227,904						
Vietnam	Malaysia	18,067	7,694,429	29,192	12,718,830	1,565,338	531,842,754	1,594,530	544,561,584
	Philippines	11,125	5,024,401						

Remarks: N/A refers to Not Available.

The hyphen (-) indicates no country destination's export.

Table 73. Quantity and value of cassava imports by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Malaysia	20,114	8,854,361	20,386	8,985,516	0	38	20,386	8,985,554
	Vietnam	272	131,155						
Lao PDR	Thailand	52,276	2,091,040	52,276	2,091,040	0	0	52,276	2,091,040
Malaysia	Indonesia	22	14,689	83	36,668	2,103	2,660,696	2,186	2,697,365
	Vietnam	61	21,980						
Myanmar	Thailand	405	0.2230	405	0.223	0	0	405	0.223
Philippines	Indonesia	246	97,471	13,659	6,208,186	198	78,500	13,857	6,286,686
	Thailand	7,182	3,481,422						
	Vietnam	6,232	2,629,293						
Singapore	Indonesia	4	38,606	1,384	515,991	6	62,971	1,390	578,962
	Malaysia	1,379	474,226						
	Singapore	0.67	3,159						
Thailand	Cambodia	0.01	96	1,141,616	196,979,228	5,352	13,584,323	1,146,968	210,563,551
	Indonesia	146	143,654						
	Lao PDR	1,140,295	195,631,603						
	Malaysia	13	107,246						
	Philippines	4.01	10,513						
	Singapore	2	284,544						
	Thailand	88	141,524						
	Vietnam	1,07	660,048						
Vietnam	Indonesia	N/A	61,030	N/A	12,022,159	N/A	2,145,374	N/A	14,167,533
	Lao PDR	N/A	11,547,075						
	Philippines	N/A	479						
	Thailand	N/A	413,575						

Remarks: N/A refers to Not Available.

The hyphen (-) indicates no country destination's import.

Table 74. FOB prices of cassava in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Flour / Starch	2025	525	532	520	479	459	552	509	382	367	344	362	367	**450**
	HS code 11062010 and 11081400	2026	398	388	514	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**434**
	Pellets HS code 07141011, 07141019,	2025	2,122	1,226	1,018	950	909	1,024	897	910	934	1,012	1,011	865	**1,073**
	0714109 and 07141099	2026	877	900	893	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**890**
Lao PDR	Starch	2025	372	358	326	309	342	324	364	317	388	407	384	386	**356**
		2026	359	337	379	385	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**365**
	Shredded	2025	153	144	145	143	145	145	140	132	134	139	143	157	**143**
		2026	175	164	137	150	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**157**
	Pellets	2025	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		2026	45	49	46	50	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**48**
Malaysia	Pellets HS code 0714101100	2025	0	4,761	0	0	0	6,954	3,099	0	0	7,288	0	0	**1,842**
		2026	0	8,134	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**4,067**
	Pellets HS code 0714101900	2025	0	0	0	0	0	2,214	0	0	0	2,308	16,675	0	**1,766**
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**0**
	Pellets HS code 0714109900	2025	495	493	0	358	366	505	586	512	576	594	380	375	**437**
		2026	504	585	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**545**
	Pellets HS code 0714109100	2025	0	0	0	0	0	0	0	0	0	0	0	0	**0**
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**0**
Myanmar	Starch	2025	351	154	147	143	171	160	186	213	N/A	333	333	N/A	**219**
		2026	333	250	333	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**305**
Philippines	Starch	2025	N/A	694	N/A	N/A	1,034	N/A	999	1,125	N/A	1,034	905	1,250	**1,006**
		2026	N/A	1,366	2,109	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**1,738**
	Shredded	2025	1,149	1,138	1,169	1,024	1,175	1,024	1,224	1,164	1,196	1,088	1,094	1,150	**1,133**
		2026	1,135	1,250	1,128	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**1,171**

Remarks: N/A refers to Not Available.

Table 74. FOB prices of cassava in selected ASEAN countries (continued).

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Philippines	Pellets	2025	N/A	1,049	2,240	1,937	1,555	1,178	1,990	1,531	1,144	1,640	1,706	1,551	**1,593**
		2026	2,138	1,752	2,564	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**2,151**
Thailand	Starch	2025	415	420	418	406	416	426	436	440	440	441	445	458	**430**
		2026	470	478	498	544	588	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**516**
	Shredded	2025	341	198	200	193	279	204	202	205	208	208	208	294	**229**
		2026	209	206	211	231	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**214**
	Pellets	2025	185	185	185	185	191	211	255	224	215	213	213	213	**206**
		2026	217	224	248	260	260	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**242**
Vietnam	Pellets	2025	336	314	285	288	300	313	313	307	331	340	354	362	**320**
		2026	334	332	355	340	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**340**

Remarks: N/A refers to Not Available.

Table 75. CIF prices of cassava in selected ASEAN countries.

Unit: US$/ton

Country	Grade	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Indonesia	Flour / Starch	2025	398	373	377	385	414	405	414	430	427	484	404	416	**411**
	HS code 11062010 and 11081400	2026	423	458	480	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**454**
	Pellets HS code 07141011,	2025	14,250	0	0	0	0	0	19,667	0	267	264	263	263	**2,914**
	07141019, 0714109 and 07141099	2026	268	266	265	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**266**
Lao PDR	Starch	2025	419	369	365	368	0	0	0	0	0	0	0	0	**380**
		2026	0	0	0	340	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**340**
	Shredded	2025	145	0	0	0	0	0	0	0	0	0	0	0	**145**
		2026	0	0	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Malaysia	Pellets HS code 0714101100	2025	0	346	0	0	0	592	295	0	0	298	0	0	**128**
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**0**
	Pellets HS code 0714101900	2025	452	0	348	0	0	0	0	0	0	0	0	0	**67**
		2026	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**0**
	Pellets HS code 0714109900	2025	1,133	1,199	0	0	1,278	1,479	1,682	1,588	1,380	1,213	1,270	743	**1,081**
		2026	1,194	1,307	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**1,250**
Myanmar	Starch	2025	N/A	617	515	515	516	588	515	515	N/A	550	833	550	**571**
		2026	666	N/A	549	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**608**
Philippines	Starch	2025	555	463	467	462	451	455	483	474	450	462	444	418	**466**
		2026	476	453	437	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**455**
Singapore	Not specified	2025	337	365	373	337	364	388	474	432	379	488	375	460	**398**
		2026	324	461	406	487	441	505	647	646	632	584	536	459	**511**

Remarks: N/A refers to Not Available.

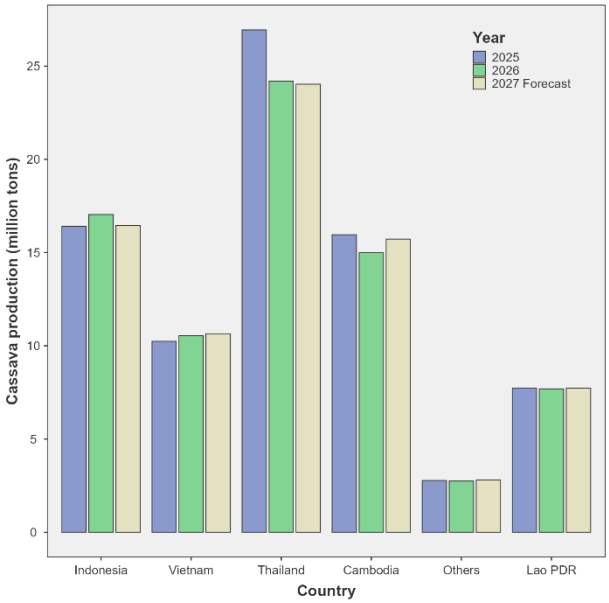


Figure 61. Cassava production of selected countries in ASEAN from 2025 to 2027.

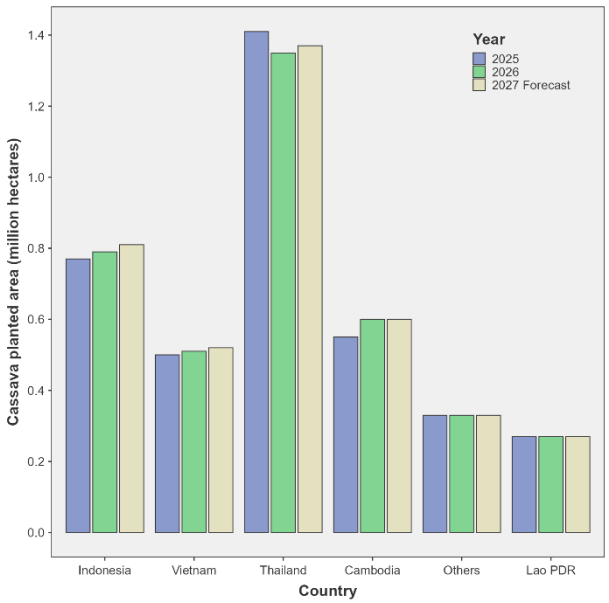


Figure 62. Cassava planted area of selected countries in ASEAN from 2025 to 2027.

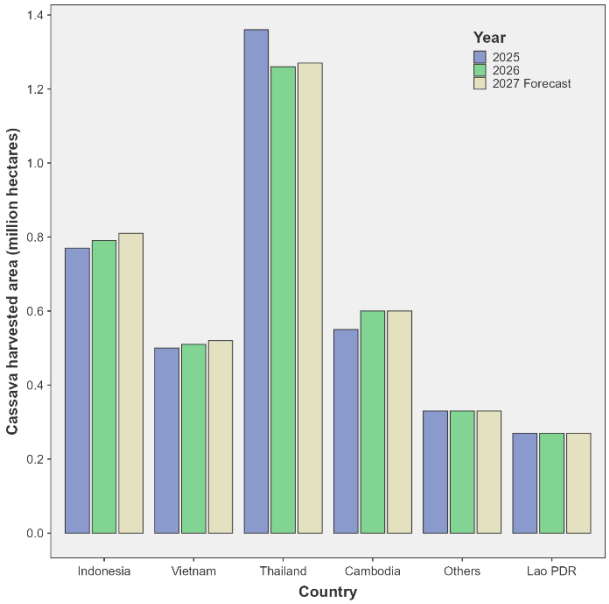


Figure 63. Cassava harvested area of selected countries in ASEAN from 2025 to 2027.

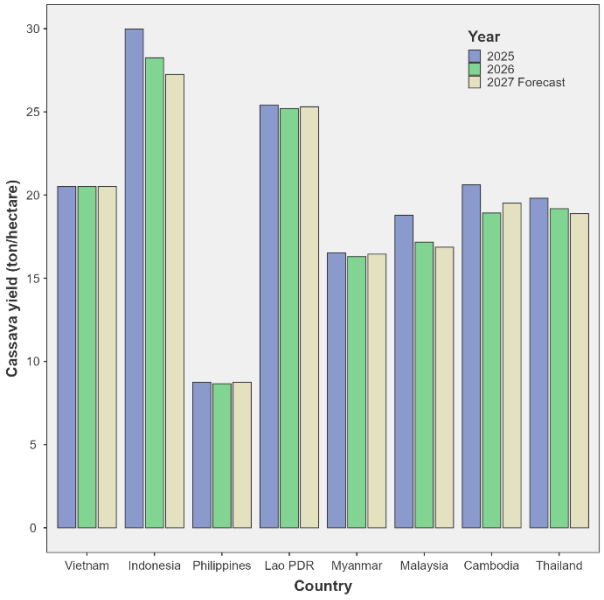


Figure 64. Cassava yield of selected countries in ASEAN from 2025 to 2027.

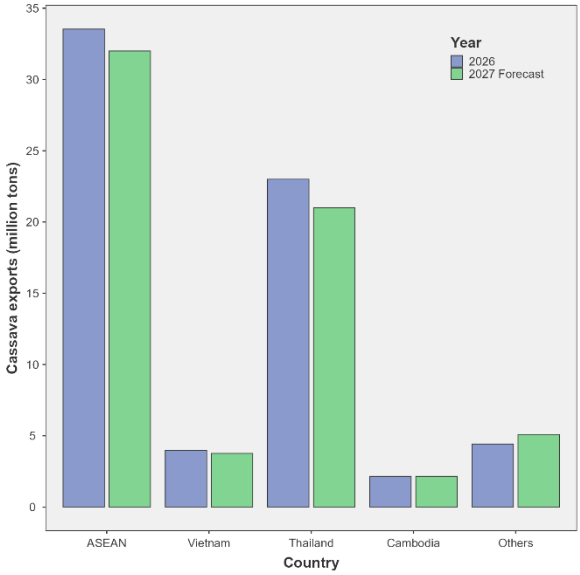


Figure 65. Amount of cassava exports of selected countries in ASEAN from 2026 to 2027.

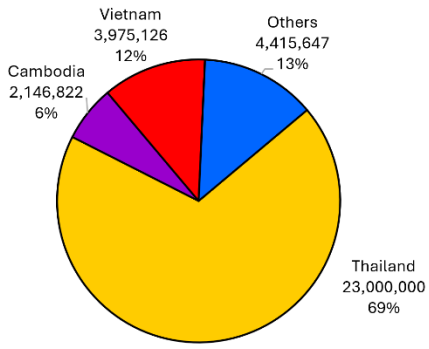


Figure 66. Share of cassava exports (tons) among ASEAN countries in 2026, totaling 8.81 million tons.

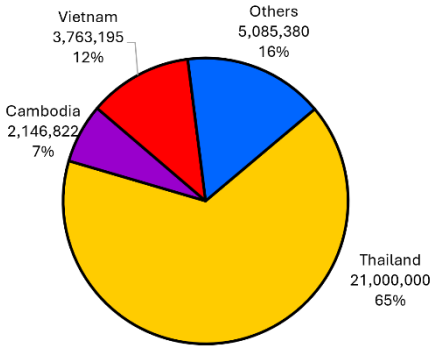


Figure 67. Share of cassava exports (tons) among ASEAN countries in 2027, totaling 9.13 million tons.

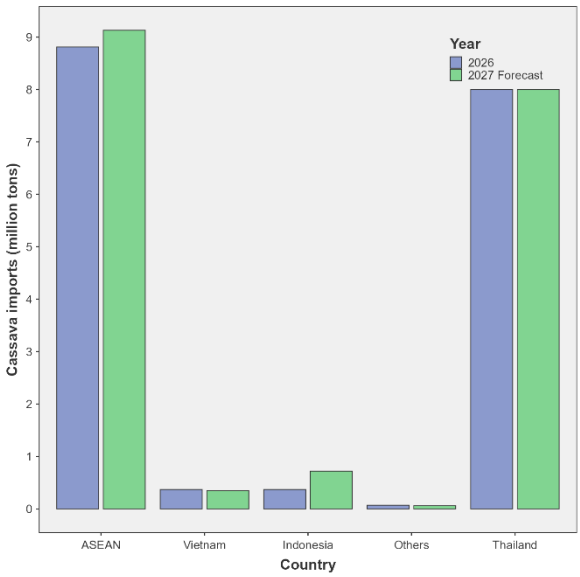


Figure 68. Amount of cassava imports of selected countries in ASEAN from 2026 to 2027.

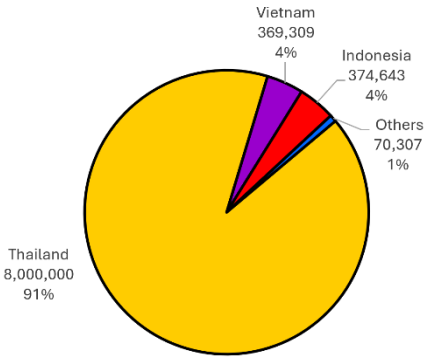


Figure 69. Share of cassava imports (tons) among ASEAN countries in 2026, totaling 33.54 million tons.

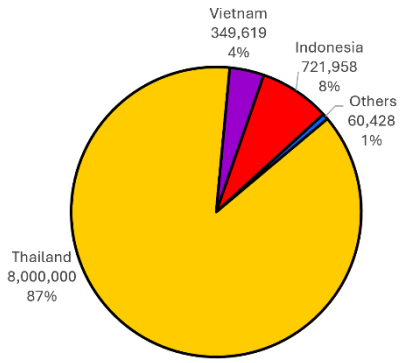


Figure 70. Share of cassava imports (tons) among ASEAN countries in 2027, totaling 32.00 million tons.

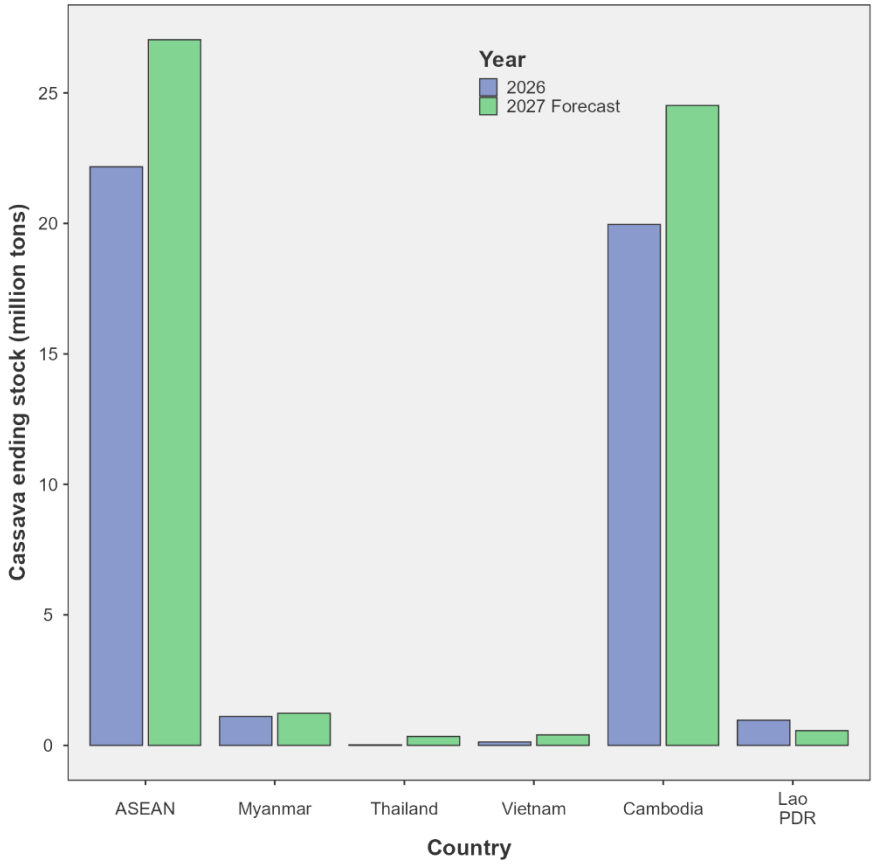


Figure 71. Amount of ending stock of cassava in ASEAN from 2026 to 2027.

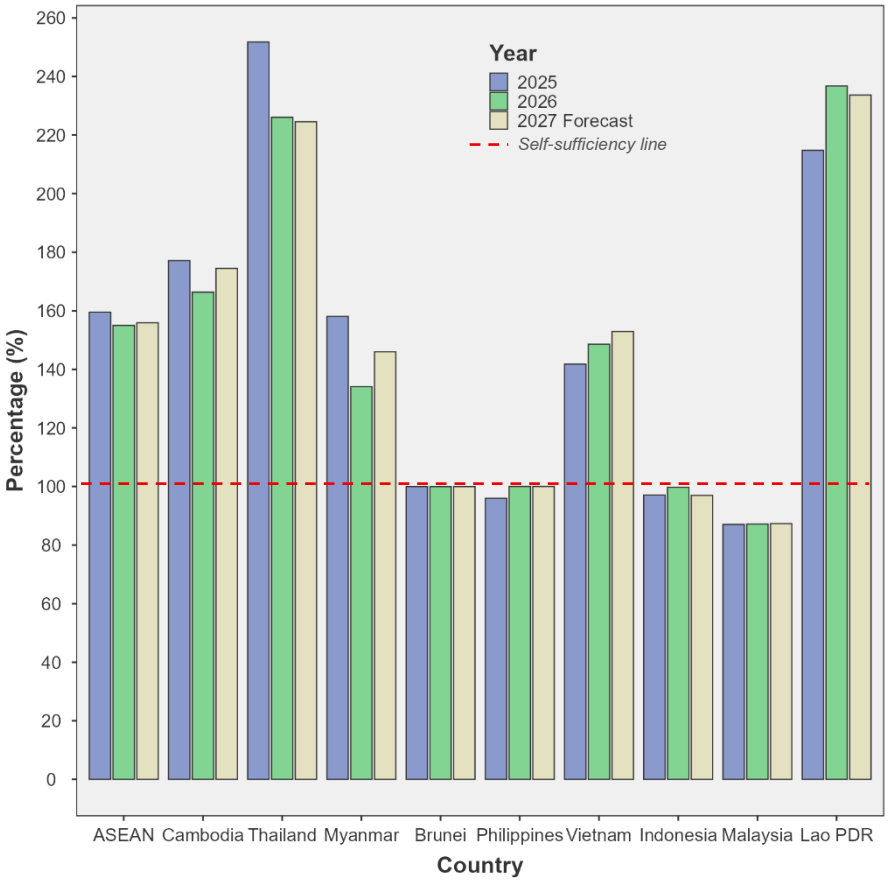


Figure 72. Ratio of cassava production to domestic utilization in ASEAN from 2025 to 2027.

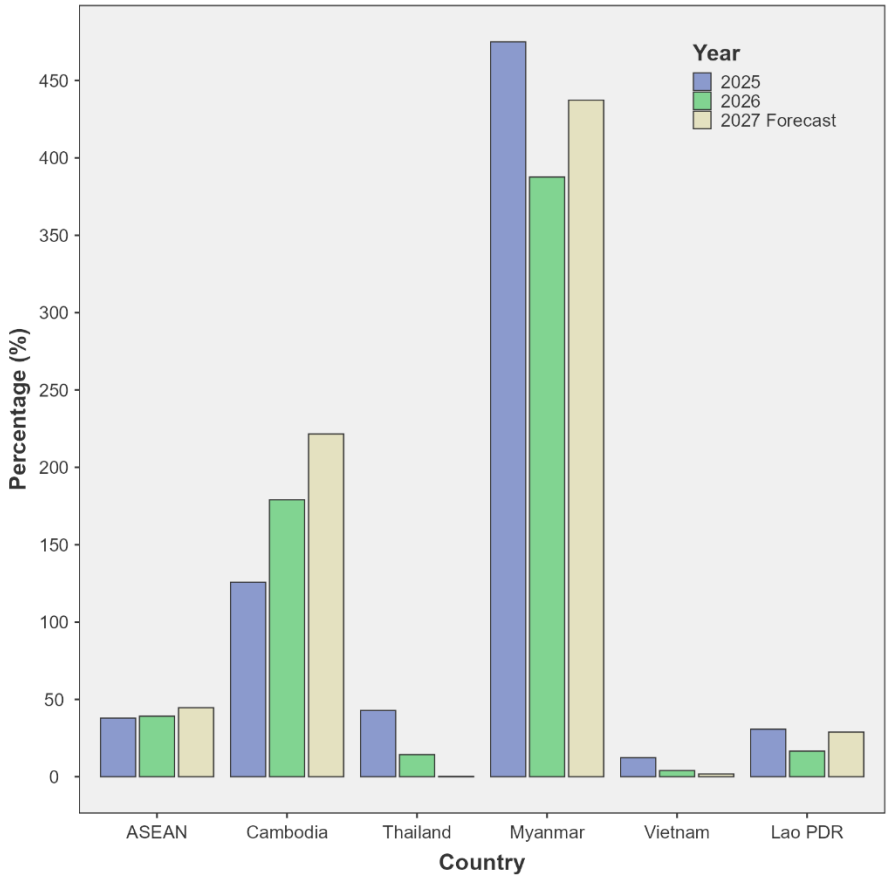


Figure 73. Ratio of cassava beginning stock to domestic utilization in ASEAN from 2025 to 2027.

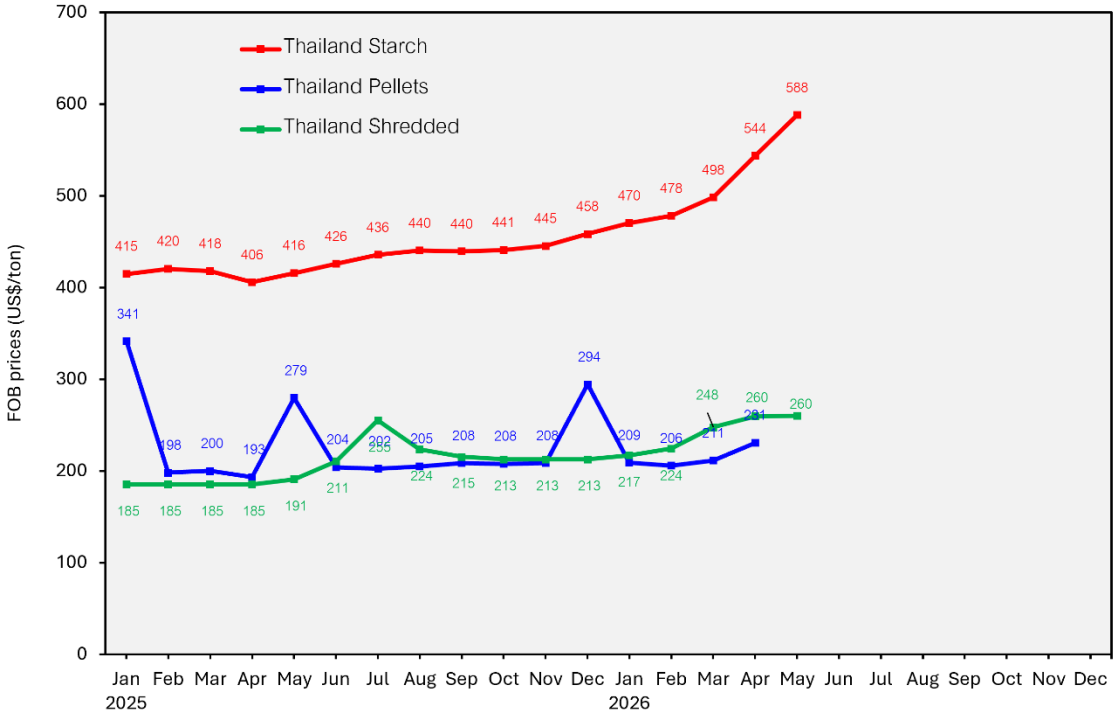


Figure 74. FOB prices (US$/ton) of cassava of selected countries in ASEAN from 2025 to 2026.

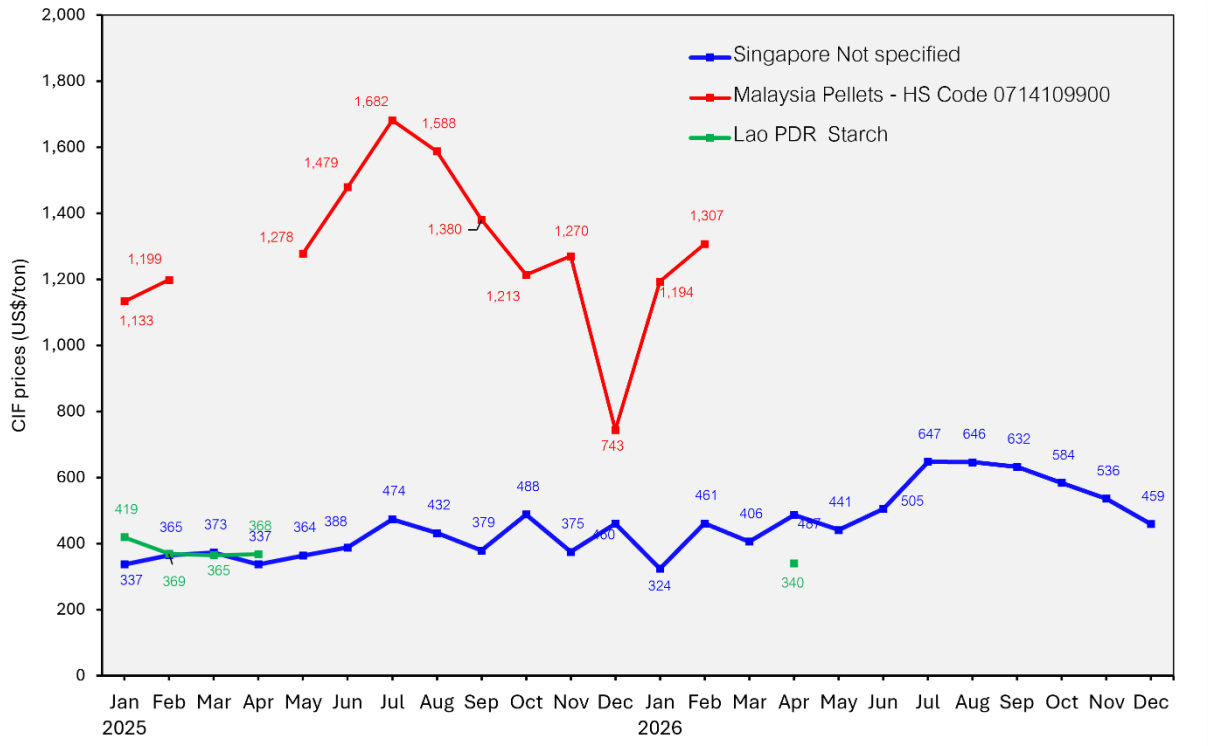


Figure 75. CIF prices (US$/ton) of cassava of selected countries in ASEAN from 2025 to 2026.

Highlights of Laying Hens' Egg Outlook for 2026

The forecast for the supply of laying hens in ASEAN indicates an increase from 10.31 million tons in 2025 to 11.15 million tons in 2026, increasing 0.84 million tons (8.17 percent increases) (Table 76). This increase in supply is influenced by rising in the production. The beginning stock is estimated at 0.10 million tons in 2026, which remain the same amount as shown in 2025. Laying hens production for 2026 is estimated at 10.87 million tons, an increase from 10.12 million tons in 2025. Additionally, the import of laying hens is forecast to decrease by 0.002 million tons (1.74 percent decreases) from 0.093 million tons in 2025 to 0.092 million tons in 2026.

The increase in demand for laying hens is primarily attributed to the ending stock. The domestic utilization is forecast to be 9.98 million tons in 2026, decreasing 0.01 million tons (0.06 percent decreases) from 9.99 million tons in 2025. The export is forecast to decrease by 0.004 million tons (3.07 percent decreases) from 0.134 million tons in 2025 to 0.130 million tons in 2026. The ending stock is expected to increase by 0.85 million tons (448.35 percent increases) from 0.19 million tons in 2025 to 1.04 million tons in 2026.

The production to domestic utilization ratio (self-sufficiency ratio) in 2026 is estimated to be 108.92 percent, which increase from 101.31 percent in 2025. The beginning stock to domestic utilization ratio (food security ratio) is predicted to be 1.90 percent in 2026, showing an increase from 1.00 percent in 2025.

Table 76. Summary of the ASEAN laying hens' egg situation from 2025 to 2026.

Unit: Million tons

Items	2025	2026	Change	
			Quantity (Million tons)	Percentage (%)
Supply (Million tons)	10.31	11.15	0.84	8.17
Beginning stock	0.10	0.10	0.00	0.00
Production	10.12	10.87	0.75	7.46
Import	0.093	0.092	-0.002	-1.74
Demand (Million tons)	10.31	11.15	0.84	8.17
Domestic utilization	9.99	9.98	-0.01	-0.06
Export	0.134	0.130	-0.004	-3.07
Ending stock	0.19	1.04	0.85	448.35
Ratio of production to domestic utilization (%)	101.31	108.93	-	-
Ratio of beginning stock to domestic utilization (%)	1.00	1.90	-	-

ASEAN Laying Hens Situation in 2025

Production

In 2025 (crop year 2024/2025), laying hens production in ASEAN is at 9.96 million tons, increasing 0.61 million tons, (6.54 percent increases) from the 9.35 million tons recorded in 2024. An increase in production is observed in Brunei Darussalam, Cambodia, Lao PDR, Indonesia, Malaysia, the Philippines, Thailand, and Vietnam. However, a decrease in laying hens' production is observed in Myanmar and Singapore (Tables 77–79 and Figures 76–78).

For Brunei in 2025, the increase in laying hen production is attributed to an increase in the number of laying hens, driven by the expansion of layer farms through the construction of three new layer houses.

For Indonesia in 2025, increases in production are attributed to increases in both the number of laying hens and yield. The increase in the number of laying hens is affected by supportive government policies. Meanwhile, the increase in yield is driven by favorable breeding environment

For Lao PDR in 2025, the increase in egg production is attributed to an expansion in the number of laying hens, driven by rising egg prices and supportive government policies. Meanwhile, egg yield is expected to decline despite favorable breeding conditions and the introduction of improved vaccination practices.

For Malaysia in 2025, the increase in egg production is attributed to an expansion in the number of laying hens. The increase is supported by a lower mortality rate, particularly as most commercial farms operate under closed-house systems and have large production capacities. Favorable input costs also support production, as many commercial farms operate their own feed mills and formulate feed to reduce costs. In addition, supportive government policies, including the price control scheme and egg subsidies implemented until August 2025, have further supported the sector. However, egg yield declines due to a delayed onset of the laying period resulting from delays in the importation of parent-stock day-old chicks (PS DOC).

For Myanmar in 2025, egg production decreases due to a reduction in the number of laying hens. The decline is mainly attributed to delays in the importation of parent-stock (PS) layer hens, which have consequently delayed domestic egg production. Meanwhile, egg yield is to remain unchanged from the previous year.

For Singapore in 2025, egg production is expected to decrease due to reductions in both the number of laying hens and egg yield. The decline is mainly attributed to short-term operational issues faced by some farms.

For Thailand in 2025, the increase in egg production is attributed to expansions in both the number of laying hens and egg yield. The increase in the number of laying hens is driven by farmers expanding their production capacity to meet market demand. Meanwhile, egg yield is expected to increase due to favorable breeding conditions.

Utilization and Stock

In 2025, the domestic utilization in ASEAN is 9.99 million tons, increasing 0.62 million tons (0.07 percent increases) from 9.37 million tons in 2024 (Tables 80-81). Data for beginning and ending stocks remain unavailable because beginning-stock data were not collected for 2024.

The ratio of production to domestic utilization (self-sufficiency ratio) in 2025 increases to 101.31 percent in 2025, up from 101.12 percent in 2024 (Table 84, Figure 86).

The ratio of ASEAN's beginning stock to domestic utilization (food security ratio) in 2025 is 1.00 percent. Data for 2024 are unavailable because beginning-stock data were not collected for that year. (Table 85, Figure 87).

Trade

ASEAN's egg exports in 2025 total 0.134 million tons, increasing 39,872 tons (0.42 percent increases) from 0.94 million tons in 2024. ASEAN's egg import in 2025 is 93,337 tons, increasing 3,946 tons (0.04 percent increases) from 89,391 tons in 2024 (Tables 82-83, Figures 79–80, and 82–83).

The quantity and value of egg exports by country of destination and the quantity and value of egg imports by country of origin are provided in Table 86-87, respectively.

Damage Area

Most countries reported no significant impacts from natural disasters. However, Myanmar's laying hen population was affected by an earthquake in central Myanmar, particularly in the Mandalay Region and Shan State. The exact number of affected laying hens is unavailable (Table 80).

Prospects for Laying Hens in 2026

Production

The forecast for egg production in ASEAN in 2026 anticipates a total of 10.71 million tons, increasing 0.76 million tons (7.59 percent increases) from 9.96 million tons in 2025. Increases in egg production are observed in Brunei Darussalam, Cambodia, Indonesia, Malaysia, the Philippines, and Vietnam. On the other hand, decreases in egg production are expected in Lao PDR, Myanmar, Singapore, and Thailand (Tables 77-79, Figures 76–78).

For Brunei Darussalam in 2026, egg production is expected to increase, driven by increases in both the number of laying hens and egg yield. These improvements are supported by the development of layer farm infrastructure, including the establishment of new layer houses using cage-free systems equipped with Big Dutchman technology, such as environmental control, feeding, and automated management systems.

For Indonesia in 2026, the egg production is expected to increase due to expansions in both the number of laying hens and yield. The increase in the number of laying hens is driven by supportive government policies. Additionally, egg yield is expected to increase due to favorable breeding environment

For Lao PDR in 2026, egg production is expected to decrease, mainly due to a reduction in egg yield. The decline in yield is attributed to decreasing average egg weight and size, as well as an increase in abnormal eggs. Meanwhile, the number of laying hens is expected to increase, supported by a lower mortality rate resulting from improved access to feed and veterinary services, along with supportive government policies.

For Malaysia in 2026, egg production is expected to increase, mainly due to an expansion in the number of laying hens. The increase is supported by a lower mortality rate, as most commercial farms operate under closed-house systems with large production capacities, as well as favorable breeding conditions. Many commercial farms also operate their own feed mills and formulate feed to reduce production costs. Meanwhile, egg yield is expected to remain unchanged or slightly decrease due to a delayed onset of the laying period resulting from delays in the importation of parent-stock day-old chicks (PS DOC).

For Myanmar in 2026, egg production is expected to decrease, mainly due to a reduction in the number of laying hens. Meanwhile, egg yield is expected to remain unchanged from the previous year.

For Thailand in 2026, egg production is expected to decrease, mainly due to a decline in egg yield. The reduction in yield is attributed to persistently high production costs, particularly feed ingredient prices, including maize and cassava, as well as labor and energy costs. Meanwhile, the number of laying hens is expected to increase, supported by rising domestic consumption as the economy recovers under government economic stimulus measures, along with improved production efficiency through investment in modern production technologies by large-scale producers.

Utilization and Stock

The forecast for the domestic utilization of laying hens in 2026 anticipates a decrease to 9.98 tons, decreasing 5,456 tons (0.0005 percent decreases) compared to 9.99 million tons in 2025. (Tables 82-83).

The forecast for the ratio of production to domestic utilization (self-sufficiency ratio) in 2026 is expected to be 108.92 percent, showing an increase from 101.31 percent in 2025 (Table 84, Figure 86). In terms of *the ratio of beginning stock to domestic utilization (food security ratio) in 2026*, it is estimated to be 1.90 percent, representing an increase from 1.00 percent in 2025 (Table 85, Figure 87).

Trade

The forecast for egg exports from ASEAN in 2026 indicates a decrease to 130,221 tons, reducing 4,125 tons (0.03 percent decreases) from 134,346 tons in 2025. Additionally, egg imports are estimated to decrease to 91,709 tons in 2026, decreasing 1,628 tons (0.02 percent decreases) from 93,337 million tons in 2025 (Tables 86-87, Figures 79-84).

Summary

ASEAN egg production is expected to increase from 9.96 million tons in 2025 to 10.71 million tons in 2026 (increase 7.59 percent), supported mainly by expansion of laying hen populations, improved farm management, and investment in modern production systems. Production is expected to increase in Brunei Darussalam, Cambodia, Indonesia, Malaysia, the Philippines, and Viet Nam, while Lao PDR, Myanmar, Singapore, and Thailand are projected to experience declines. Despite these differences, ASEAN's self-sufficiency ratio is projected to increase from 101.31 percent to 108.92 percent, indicating a stronger regional supply position.

This positive outlook is consistent with the global expansion of egg production, particularly in Asia and Latin America, where growing demand for affordable animal protein continues to support the sector [33,34]. The U.S. and Australia are also expected to see recovering or increasing egg production, while stronger export demand is providing additional opportunities for major producing countries [35-37]. However, the global market is gradually shifting from supply shortages toward higher production and potential oversupply, which could put pressure on egg prices and producer margins [38,39].

Crisis and climate risks remain important constraints. Highly pathogenic avian influenza (HPAI) can rapidly reduce laying hen populations and disrupt egg supplies, while heat stress and extreme weather can reduce laying performance, increase mortality, and raise production costs [40,41]. Climate-related disruptions to maize and soybean production may further increase feed costs, while higher temperatures increase energy requirements for cooling in intensive layer farms [41]. These risks are particularly relevant to ASEAN because of its exposure to tropical heat, flooding, and other extreme weather events.

Overall, ASEAN's laying hen sector has a favorable supply outlook for 2026, but maintaining food security will depend not only on increasing production but also on controlling feed and energy costs, strengthening disease prevention, improving climate-resilient farm systems, and maintaining stable regional trade. Thus, the main challenge is shifting from increasing egg availability to ensuring resilient, affordable, and sustainable egg production in the face of disease, climate, and market risks.

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Table 77. Laying hens production in ASEAN countries from 2024 to 2026.

Unit: 1,000 tons

Country	2024 (2023/2024)	2025 (2024/2025)	Change 2025 over 2024		2026 (2025/2026)	Change 2026 over 2025	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**9,345.78**	**9,956.56**	**610.77**	**6.54**	**10,712.31**	**755.75**	**7.59**
Brunei	9.54	10.23	0.69	7.26	10.49	0.26	2.51
Cambodia	52.43	59.22	6.80	12.96	59.44	0.22	0.36
Indonesia	6,134.54	6,568.23	433.69	7.07	7,327.35	759.12	11.56
Lao PDR	52.80	54.96	2.16	4.09	53.40	-1.56	-2.84
Malaysia	803.37	861.69	58.32	7.26	883.20	21.51	2.50
Myanmar	168.14*	160.58*	-7.57	-4.50	55.28*	-105.30	-65.57
Philippines	782.78	847.78	65.00	8.30	894.35*	46.58	5.49
Singapore	46.41	44.19	-2.22	-4.78	43.87	-0.32	-0.73
Thailand	652.13*	671.59*	19.46	2.98	670.56*	-1.04	-0.15
Vietnam	643.65*	678.09*	34.44	5.35	714.37*	36.29	5.35

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 78. Number of Laying hens in ASEAN countries from 2024 to 2026.

Unit: 1,000 heads

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**689,543.92**	**731,833.55**	**42,289.63**	**6.13**	**789,142.51**	**57,308.96**	**7.83**
Brunei	1,050.21	1,404.17	353.96	33.70	1,432.25	1,432.25	2.00
Cambodia	7,150.31	8,089.81	939.50	13.14	8,097.04	7.23	0.09
Indonesia	415,330.47	443,311.83	27,981.36	6.74	494,547.44	51,235.61	11.56
Lao PDR	2,503.60	2,664.91	161.31	6.44	2,779.78	114.87	4.31
Malaysia	37,727.42	41,381.55	3,654.14	9.69	42,414.69	1,033.14	2.50
Myanmar	11,996.41	11,456.57	-539.84	-4.50	3,998.80	-7,457.77	-65.10
Philippines	69,947.68	72,883.66	2,935.99	4.20	78,177.73	5,294.07	7.26
Singapore	2,581.62	2,596.42	14.80	0.57	2,526.31	-70.10	-2.70
Thailand	52,663.46	53,000.63	337.17	0.64	53,203.43	202.80	0.38
Vietnam	88,592.74	95,044.00	6,451.26	7.28	101,965.03	6,921.03	7.28

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 79. Laying hens yield in ASEAN countries from 2024 to 2026.

Unit: kg/head

Country	2025 (2024/2025)	2026 (2025/2026)	Change 2026 over 2025		2027 (2026/2027)	Change 2027 over 2026	
			Quantity	Percentage		Quantity	Percentage
ASEAN	**13.55**	**13.60**	**0.05**	**0.38**	**13.57**	**-0.03**	**-0.22**
Brunei	9.09	7.29	-1.80	-19.78	7.32	0.04	0.50
Cambodia	7.33	7.32	-0.01	-0.16	7.34	0.02	0.27
Indonesia	14.77	14.82	0.05	0.31	14.82	0.00	0.00
Lao PDR	21.09	20.62	-0.47	-2.21	19.21	-1.41	-6.85
Malaysia	21.29	20.82	-0.47	-2.21	20.82	0.00	0.00
Myanmar	18.10	18.10	0.00	0.00	18.10	0.00	0.00
Philippines	11.19	11.63	0.44	3.94	11.44*	-0.19	-1.65
Singapore	17.98	17.02	-0.96	-5.33	17.36	0.34	2.02
Thailand	12.38*	12.67*	0.29	2.33	12.60*	-0.07	-0.53
Vietnam	7.27*	7.13*	-0.13	-1.80	7.01*	-0.13	-1.80

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 80. Number of Laying Hens Affected by Causes of Damage in ASEAN Countries for 2026.

Unit: hectare

Country	Cause of damage								
	Thunderstorm Tornado, Storm, Typhoon	Flood	Drought	Landslides and Mudslides	Seasonal Diseases	Earthquake	Wildfire	Others	Total
ASEAN	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Brunei	0	0	0	0	0	0	0	0	0
Cambodia	0	0	0	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0	0	0
Lao PDR	0	0	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0	0	0
Myanmar	0	0	0	0	0	N/A	0	0	N/A
Philippines	0	0	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	0	0	0
Thailand	0	0	0	0	0	0	0	0	0
Vietnam	0	0	0	0	0	0	0	0	0

Remarks: N/A refers to data that is Not Available.

Table 81. Laying hens balance sheet of ASEAN countries in 2024.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**N/A**	**89,391**	**9,560,237**	**9,365,531**	**94,474**	**100,232**	**9,560,237**	**89,391**
Brunei	N/A	0	9,541	8,890	651	0	9,541	0
Cambodia	N/A	52,429	0	52,429	52,429	0	0	52,429
Indonesia	N/A	6,134,539	0	6,134,539	6,031,953	3,180	99,406	6,134,539
Lao PDR	N/A	52,800	188	52,988	52,161	0	826	52,988
Malaysia	N/A	928,430	0	928,430	866,408	62,022	0	928,430
Myanmar	N/A	168,142*	0	168,142*	168,142*	0	0	168,142
Philippines	N/A	782,779	0	782,779	782,779*	0*	0	782,779
Singapore	N/A	46,410	89,185	135,595	135,031	564	0	135,595
Thailand	N/A	652,132*	18	652,150	624,093*	28,056	0	652,150
Vietnam	N/A	643,645*	0	643,645	643,645*	0	0	643,645

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 82. Laying hens balance sheet of ASEAN countries in 2025.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**100,232**	**10,118,474**	**93,337**	**10,312,043**	**9,987,551**	**134,346**	**190,145**	**10,312,043**
Brunei	0	10,234	0	10,234	9,138	1,095	1	10,234
Cambodia	0	59,224	0	59,224	59,224	0	0	59,224
Indonesia	99,406	6,568,231	82	6,667,718	6,475,415	5,350	186,953	6,667,718
Lao PDR	826	54,959	157	55,942	52,751	0	3,191	55,942
Malaysia	0	1,023,605	0	1,023,605	930,590	93,015	0	1,023,605
Myanmar	0	160,575*	0	160,575*	160,575*	0	0	160,575
Philippines	0	847,776	0*	847,776	847,776*	0*	0	847,776
Singapore	0	44,190	93,098	137,288	136,694	594	0	137,288
Thailand	0	671,592*	0	671,592	637,300*	34,292	0	671,592
Vietnam	0	678,088*	0	678,088	678,088*	0	0	678,088

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 83. Laying hens balance sheet of ASEAN countries in 2026.

Unit: ton

Country	Supply				Demand			
	Beginning stock	Production	Import	Total	Domestic utilization	Export	Ending stock	Total
ASEAN	**190,144**	**10,872,810**	**91,709**	**11,154,664**	**9,981,786**	**130,221**	**1,042,656**	**11,145,378**
Brunei	0	10,491	0	10,492	9,286	1,205	1	1,206
Cambodia	0	59,440	0	59,440	59,440	0	0	59,440
Indonesia	186,953	7,327,352	27	7,514,332	6,471,351	4,360	1,038,621	7,514,332
Lao PDR	3,191	53,400	451	57,043	53,120	0	3,922	57,043
Malaysia	0	1,043,699	0	1,043,699	950,684	92,903	112	1,043,699
Myanmar	0	55,279*	0	55,279*	55,279*	0	0	55,279
Philippines	0	894,353*	89*	894,442	894,442*	0.32*	0	894,442
Singapore	0	43,866	91,142	135,008	134,429	579	0	135,008
Thailand	0	670,556*	0	670,556	639,381*	31,174	0	670,556
Vietnam	0	714,374*	0*	714,374	714,374*	0*	0	714,374

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 84. Ratio of laying hens' production to domestic utilization in ASEAN countries (self-sufficiency ratio) from 2024 to 2026.

Unit: ton

Country	2024			2025			2026		
	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)	Production	Domestic utilization	Ratio (%)
ASEAN	**9,470,846.47**	**9,365,532.28**	**101.12**	**10,118,474.09**	**9,987,551.13**	**101.31**	**10,872,809.82**	**9,982,095.45**	**108.92**
Brunei	9,541.00	8,891.00	107.31	10,234.00	9,138.00	111.99	10,491.00	9,595.00	109.34
Cambodia	52,428.77	52,428.77	100.00	59,224.15	59,224.15	100.00	59,439.85	59,439.85	100.00
Indonesia	6,134,538.99	6,031,953.00	101.70	6,568,231.00	6,475,415.00	101.43	7,327,352.00	6,471,351.00	113.23
Lao PDR	52,800.00	52,161.50	101.22	54,959.00	52,750.90	104.19	53,400.00	53,120.36	100.53
Malaysia	928,430.45	866,408.31	107.16	1,023,604.67	930,590.05	110.00	1,043,698.97	950,684.36	109.78
Myanmar	168,141.71	168,141.71	100.00	160,575.36	160,575.36	100.00	55,279.47	55,279.47	100.00
Philippines	782,778.67	782,778.67	100.00	847,775.57	847,775.57	100.00	894,353.28	894,442.00	99.99
Singapore	46,410.00	135,030.99	34.37	44,190.00	136,694.11	32.33	43,866.00	134,428.55	32.63
Thailand	652,131.63	624,093.08	104.49	671,592.41	637,300.06	105.38	670,555.53	639,381.14	104.88
Vietnam	643,645.25	643,645.25	100.00	678,087.93	678,087.93	100.00	714,373.72	714,373.72	100.00

Table 85. Ratio of laying hens beginning stock to domestic utilization in ASEAN countries (food security ratio) from 2024 to 2026.

Unit: ton

Country	2024			2025			2026		
	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)	Beginning stock	Domestic utilization	Ratio (%)
ASEAN	**0.00**	**9,365,532.28**	**0.00**	**100,231.90**	**9,987,551.13**	**1.00**	**190,144.49**	**9,982,095.45**	**1.90**
Brunei	0.00	8,891.00	0.00	0.00	9,138.00	0.00	0.00	9,595.00	0.00
Cambodia	0.00	52,428.77	0.00	0.00	59,224.15	0.00	0.00	59,439.85	0.00
Indonesia	0.00	6,031,953.00	0.00	99,405.61	6,475,415.00	1.54	186,953.10	6,471,351.00	2.89
Lao PDR	0.00	52,161.50	0.00	826.29	52,750.90	1.57	3,191.39	53,120.36	6.01
Malaysia	0.00	866,408.31	0.00	0.00	930,590.05	0.00	0.00	950,684.36	0.00
Myanmar	0.00	168,141.71	0.00	0.00	160,575.36	0.00	0.00	55,279.47	0.00
Philippines	0.00	782,778.67	0.00	0.00	847,775.57	0.00	0.00	894,442.00	0.00
Singapore	0.00	135,030.99	0.00	0.00	136,694.11	0.00	0.00	134,428.55	0.00
Thailand	0.00	624,093.08	0.00	0.00	637,300.06	0.00	0.00	639,381.14	0.00
Vietnam	0.00	643,645.25	0.00	0.00	678,087.93	0.00	0.00	714,373.72	0.00

Remarks: * notes that the value is forecast by the AFSIS Secretariat.

Table 86. Quantity and value of laying hens export by countries of destination in 2026.

Exporting country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	Singapore	1,562	234,327*	1,562	234,327*	0	0	1,562	234,327*
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	Singapore	1,640	3,016,984	1,678	3,064,184	0	0	1,678	3,064,184
	Timor-Leste	38	47,200						
Lao PDR	-	0	0	0	0	0	0	0	0
Malaysia	Indonesia	555	697,665	10,500	19,055,674	1,356	2,412,716	11,856	21,468,390
	Philippines	1	2,847						
	Singapore	9,575	17,698,512						
	Timor-Leste	369	656,650						
Myanmar	N/A	Nil	Nil	Nil	Nil	Nil	Nil	Nil	Nil
Philippines	-	0	0	0	0	0.32	1,285	0.32	1,285
Singapore	-	0	0	0	0	0	0	0	0
Thailand	Singapore	94,924	10,180,145	97,835	10,551,918	22,626	2,882,236	120,461	13,434,154
	Myanmar	2,911	371,773						
Vietnam	Cambodia	N/A	1,474,837	N/A	2,083,423	N/A	2,143,700	N/A	4,227,123
	Singapore	N/A	511,516						
	Lao PDR	N/A	97,070						

Remarks: N/A notes that the data is not available due to no collecting or reporting systems in the country yet.
The hyphen (-) indicates no country destination's import.
* Brunei Darussalam is reported in Brunei dollar (B$).
Nil indicates as a small amount.

Note:

1. Lao PDR: Eggs have limited export potential; therefore, trade policy focuses primarily on stabilizing imports rather than promoting exports.

2. Vietnam – Egg exports: Data source: HS code data from the Department of Customs of Vietnam. The data cover only the first four months of 2026, and no aggregate data are available for the full year. Quantity data are unavailable; the reported data refer to the export value of eggs in general.

Table 87. Quantity and value of laying hens import by countries of origin in 2026.

Importing country	Country of destination	Quantity (ton)	Value (US$)	Total within ASEAN		Total across ASEAN		Total	
				Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)	Quantity (ton)	Value (US$)
Brunei	-	0	0	0	0	0	0	0	0
Cambodia	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Indonesia	-	0	0	0	0	0	0	0	0
Lao PDR	Thailand	158	252,767	361	537,130	90	180,548	451	717,678
	Vietnam	203	284,363						
Malaysia	-	0	0	0	0	0	0	0	0
Myanmar	N/A	Nil	Nil	Nil	Nil	Nil	Nil	Nil	Nil
Philippines	-	0	0	0	0	89	369,895	89	369,895
Singapore	-	0	0	0	0	0	0	0	0
Thailand	-	0	0	0	0	0	0	0	0
Vietnam	-	0	0	0	0	N/A	4,430,246	N/A	4,430,246

Remarks: N/A notes that the data is not available due to no collecting or reporting systems in the country yet.
Nil denotes a small amount.
The hyphen (-) indicates no country destination's import.

Note:

1. Vietnam – Egg imports: Data source: HS code data from the Department of Customs of Viet Nam. The data cover only the first four months of 2026, and no aggregate data are available for the full year. Quantity data are unavailable; the reported data refer to the import value of eggs in general.
2. Philippines:
   1) Preliminary data
   2) Value - Free on Board
   3) No import and export data within ASEAN countries
   4) Commodity description of Export: Other: | - - Of fowls of the species *Gallus domesticus*
   5) Commodity description of Import: Fertilized eggs for incubation: | - - Of fowls of the species *Gallus domesticus* : | - - - Other

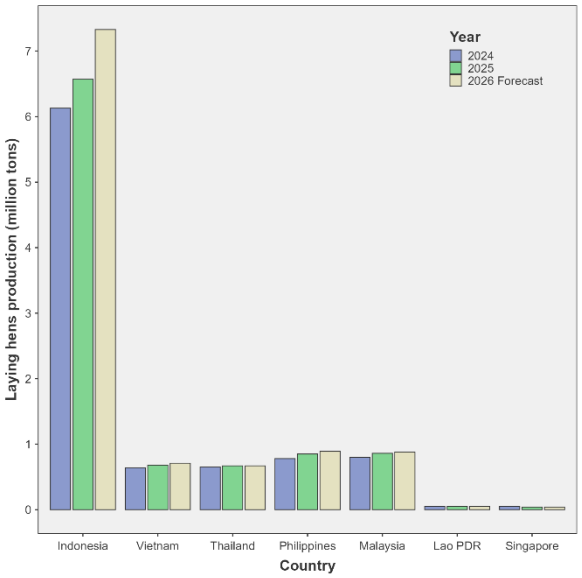


Figure 76. Laying hens' production of selected countries in ASEAN from 2024 to 2026.

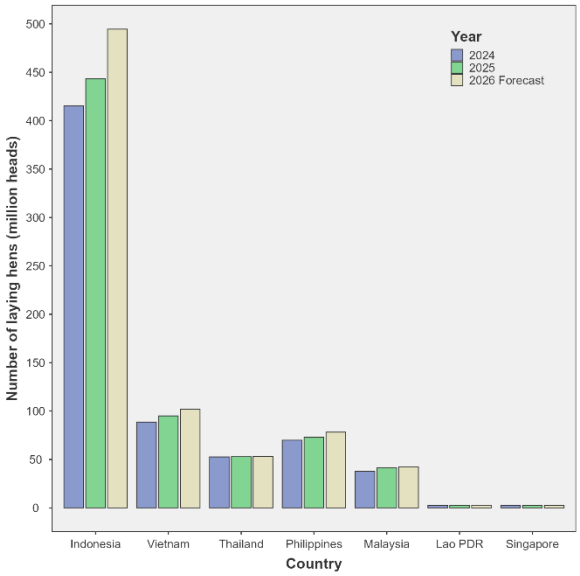


Figure 77. Number of laying hens of selected countries in ASEAN from 2024 to 2026.

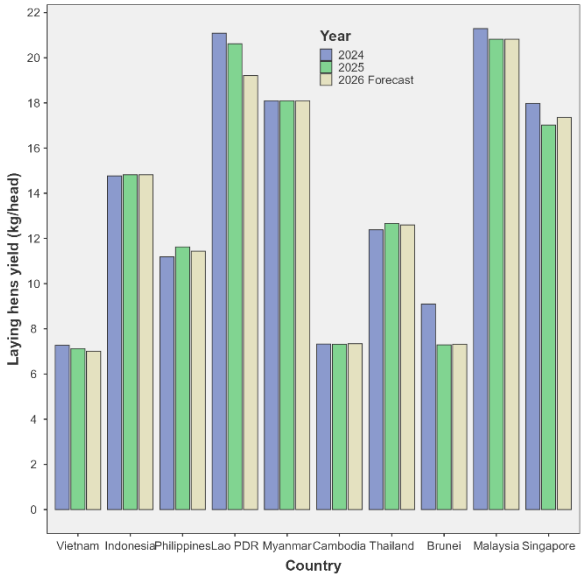


Figure 78. Laying hens' yield of selected countries in ASEAN from 2024 to 2026.

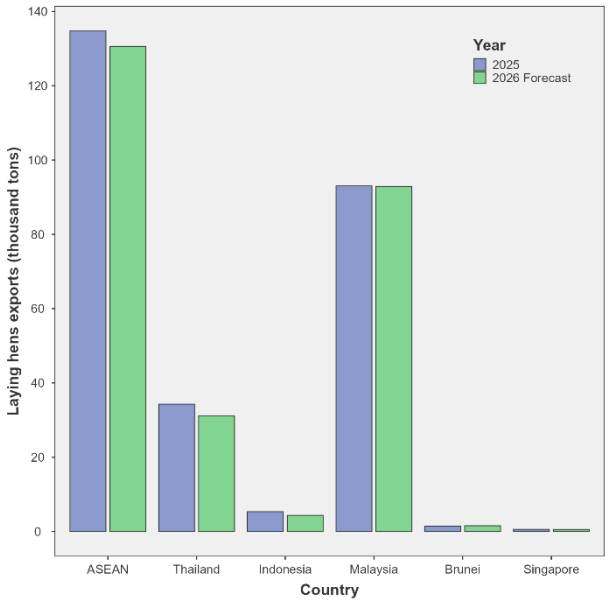


Figure 79. Amount of cassava exports of selected countries in ASEAN from 2025 to 2026.

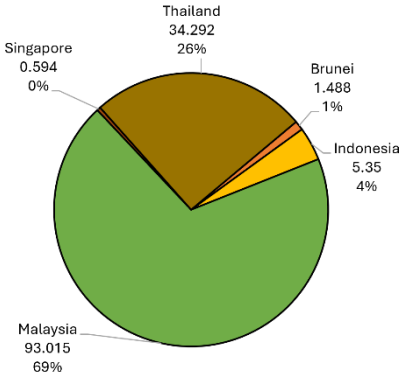


Figure 80. Share of cassava exports (thousand tons) among ASEAN countries in 2025, totaling 134,346 tons.

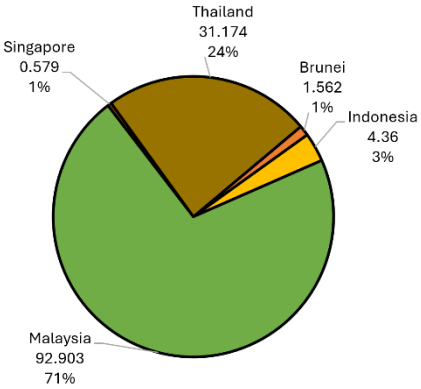


Figure 81. Share of cassava exports (thousand tons) among ASEAN countries in 2026 totaling 130,221 tons.

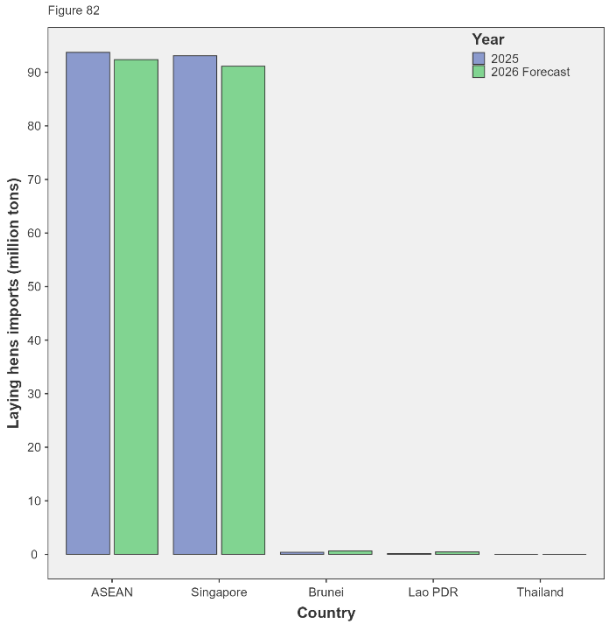


Figure 82. Amount of cassava imports of selected countries in ASEAN from 2025 to 2026.

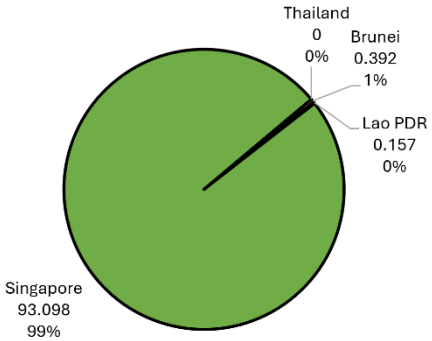


Figure 83. Share of cassava imports (thousand tons) among ASEAN countries in 2025, totaling 93,337 tons.

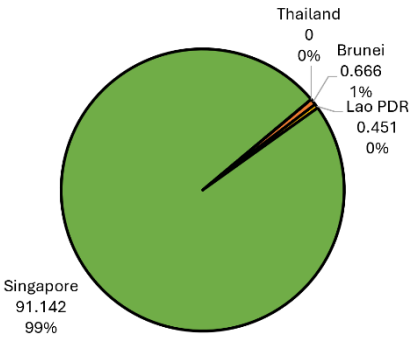


Figure 84. Share of cassava imports (thousand tons) among ASEAN countries in 2026, totaling 91,709 tons.

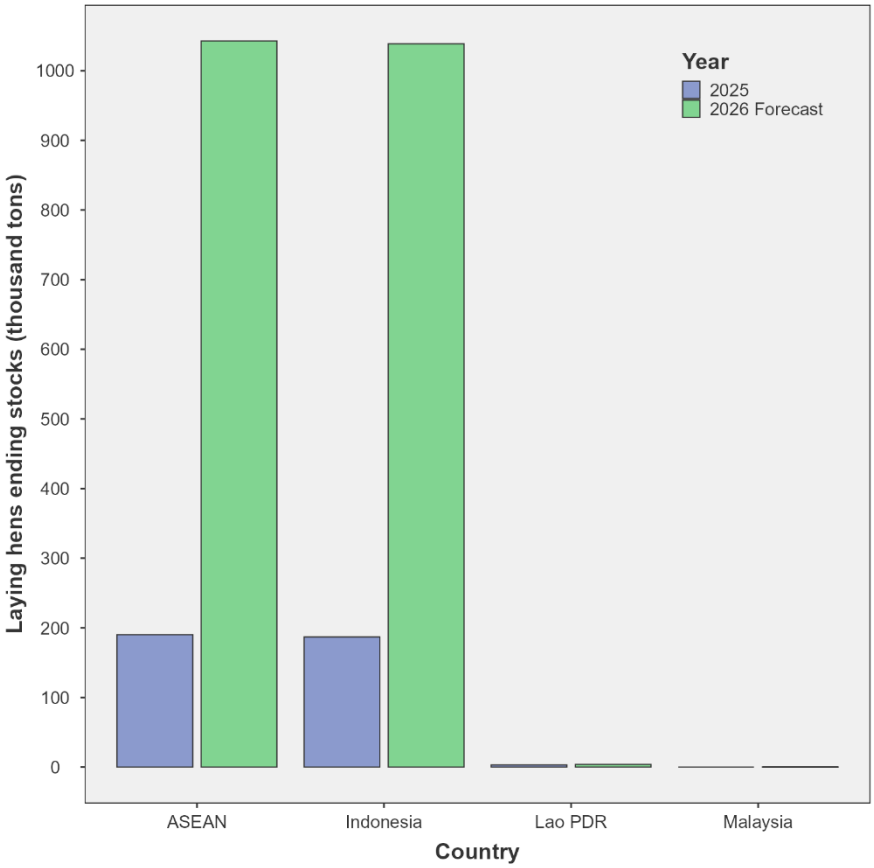


Figure 85. Amount of ending stock of laying hens in ASEAN from 2025 to 2026.

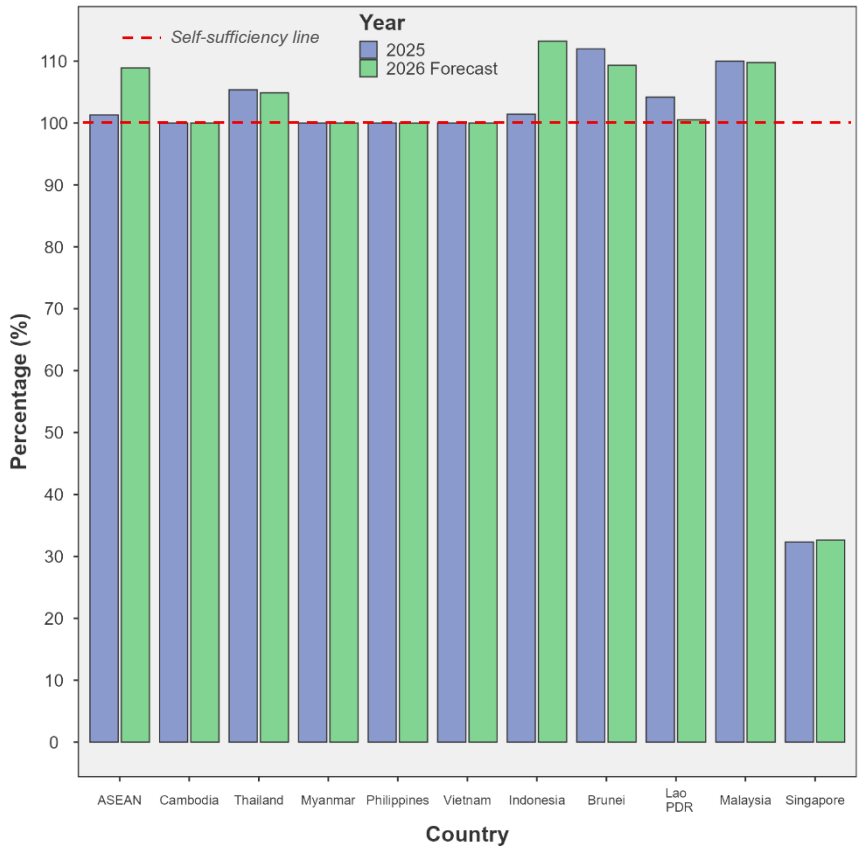


Figure 86. Ratio of laying hens' production to domestic utilization in ASEAN from 2025 to 2026.

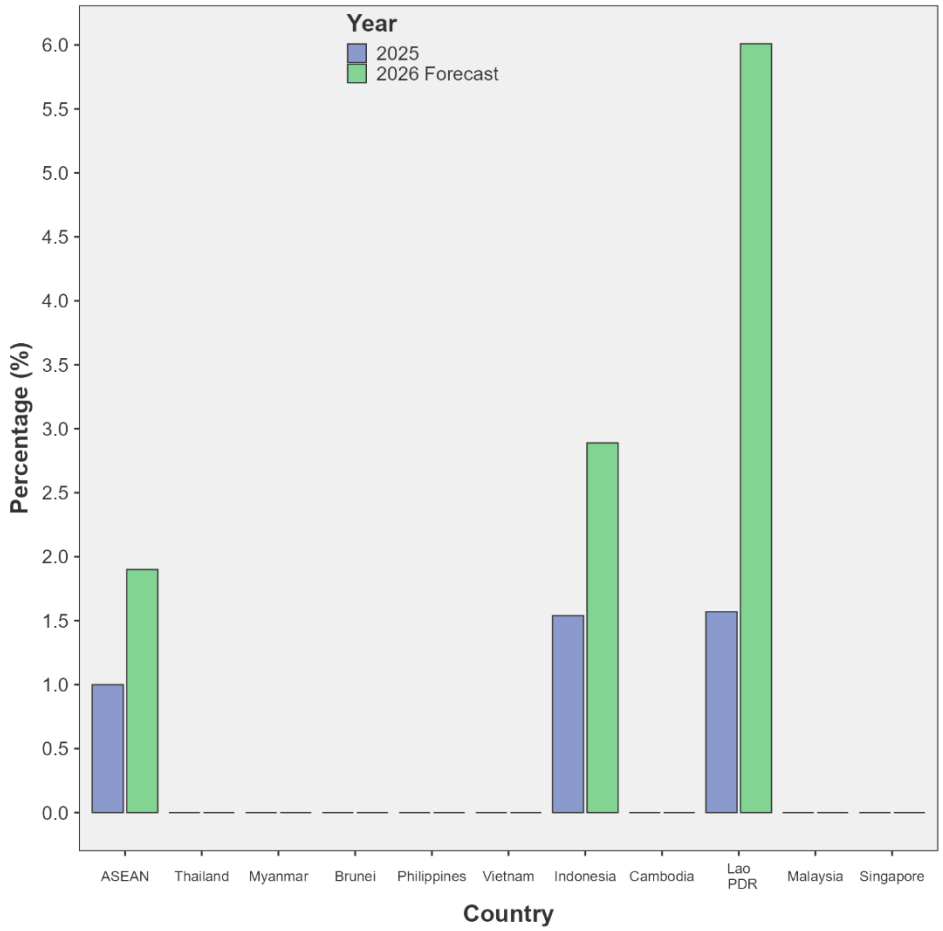


Figure 87. Ratio of laying hens' beginning stock to domestic utilization in ASEAN from 2025 to 2026

Explanatory Notes

Production of Paddy for 2026 (crop year 2025/2026)

Brunei Darussalam

- Wet season refers to the crop harvested from January to May 2026.
- Dry season refers to the crop harvested from July to November 2026.

Cambodia

- Wet season refers to the crop harvested from August to December 2025.
- Dry season refers to the crop harvested from January to April 2026.

Indonesia

- Wet season refers to the crop harvested from September 2025 to February 2026.
- Dry season refers to the crop harvested from May to August 2026.

Lao PDR

- Wet season refers to the crop harvested from September to December 2025.
- Dry season refers to the crop harvested from March to May 2026.

Malaysia

- Wet season refers to the crop harvested from September 2025 to February 2026.
- Dry season refers to the crop harvested from March to August 2026.

Myanmar

- Wet season refers to the crop harvested from August 2025 to February 2026.
- Dry season refers to the crop harvested from February to April 2026.

The Philippines

- Wet season refers to the crop harvested from July to December 2025.
- Dry season refers to the crop harvested from January to March 2026.

Thailand

- Wet season refers to the crop harvested from July 2025 to May 2026.
- Dry season refers to the crop harvested from February to September 2025.

Vietnam

- Spring season
    - North region refers to the crop harvested from May to July 2026.
    - South region refers to the crop harvested from February to May 2026.
- Autumn season
    - North region refers to the crop harvested from August to October 2026.
    - South region refers to the crop harvested from July to September 2026.
- Winter season
    - North region refers to the crop harvested from October to November 2026.
    - South region refers to the crop harvested from October to December 2026.

Production of Maize for 2026 (crop year 2025/2026)

Brunei Darussalam

- Wet season refers to the crop harvested from January to June 2026.
- Dry season refers to the crop harvested from July to December 2026.

Cambodia

- Wet season refers to the crop harvested from October to November 2026.
- Dry season refers to the crop harvested from June to July 2026.

Indonesia

- 1st crop harvested from January to April 2026.
- 2nd crop harvested from May to August 2026.
- 3rd crop harvested from September to December 2026.

Lao PDR

- Wet season refers to the crop harvested from September to December 2026.
- Dry season refers to the crop harvested from March to May 2026.

Malaysia

- Dry season refers to the crop harvested during May 2026.

Myanmar

- Wet season refers to the crop harvested from August 2025 to January 2026.
- Dry season refers to the crop harvested from January to April 2026.

The Philippines

- Wet season refers to the crop harvested from August to December 2025.
- Dry season refers to the crop harvested from January to March 2026.

Thailand

- Wet season refers to the crop harvested from July 2025 to January 2026.
- Dry season refers to the crop harvested from February to May 2026.

Vietnam

- 1st crop harvested from February to June 2026.
- 2nd crop harvested from October to November 2026.

Production of Sugarcane for 2026 (crop year 2025/2026)

Brunei Darussalam

- The crop harvested from January to December 2026.

Cambodia

- The crop harvested from October to December 2025.

Indonesia

- The crop harvested from September 2025 to December 2026.

Lao PDR

- The crop harvested from January to May 2026.

Myanmar

- The crop harvested from November 2025 to March 2026.

The Philippines

- The crop harvested from October 2025 to May 2026.

Thailand

- The crop harvested from December 2025 to May 2026.

Vietnam

- The crop harvested from November 2025 to May 2026

Production of Soybean for 2026 (crop year 2025/2026)

Cambodia

- Wet season refers to the crop harvested from January to February 2026.
- Dry season refers to the crop harvested from October to December 2026.

Indonesia

- 1st crop harvested from January to April 2026.
- 2nd crop harvested from May to August 2026.
- 3rd crop harvested from September to December 2026.

Lao PDR

- Wet season refers to the crop harvested from September to November 2025.
- Dry season refers to the crop harvested from January to April 2026.

Myanmar

- Wet season refers to the crop harvested from August 2025 to January 2026.
- Dry season refers to the crop harvested from January to April 2026.

The Philippines

- Wet season refers to the crop harvested from August to December 2025.
- Dry season refers to the crop harvested from January to June 2026.

Thailand

- Wet season refers to the crop harvested from August to December 2025.
- Dry season refers to the crop harvested from January to May 2026.

Vietnam

- Wet season refers to the crop harvested from February to May 2026.
- Dry season refers to the crop harvested from August to November 2026.

Production of Cassava for 2026 (crop year 2025/2026)

Brunei Darussalam

- The crop harvested from August 2025 to December 2026.

Cambodia

- The crop harvested from January to February 2026.

Indonesia

- 1st crop harvested from January to April 2026.
- 2nd crop harvested from May to August 2026.
- 3rd crop harvested from September to December 2026.

Lao PDR

- The crop harvested from December 2025 to March 2026.

Malaysia

- The crop harvested from October 2025 to December 2026.

Myanmar

- The crop harvested from September 2025 to June 2026.

The Philippines

- 1st crop harvested from August to December 2025.
- 2nd crop harvested from January to June 2026.

Thailand

- The crop harvested from October 2025 to September 2026.

Vietnam

- Wet season refers to the crop harvested from February to May 2026.
- Dry season refers to the crop harvested from January to March 2026.

Domestic utilization, stock, import, and export refer to a calendar year.

N/A noted that the data is not available due to no collecting or reporting systems in the country yet.

N/P denotes Not Planting.

Nil indicates as a small amount.

The hyphen (-) indicates no country destination’s

Milling Rate of Rice (2026)

Country	Paddy (ton)	Milling rate (%)
ASEAN	**1**	**64**
Brunei	1	65
Cambodia	1	64
Indonesia	1	64
Lao PDR	1	60
Malaysia	1	64
Myanmar	1	63
Philippines	1	63
Thailand	1	65
Vietnam	1	65

Extraction Rate of Sugar (2026)

Country	Sugarcane (ton)	Extraction rate (%)
ASEAN	**1,000**	**98**
Cambodia	1,000	100
Indonesia	1,000	71
Lao PDR	1,000	200
Myanmar	1,000	80
Philippines	1,000	89
Thailand	1,000	110
Vietnam	1,000	100

Average Weight of Egg (2026)

Country	Egg weight (gram per egg)
Brunei	N/A
Cambodia	39*
Indonesia	45*
Lao PDR	50*
Malaysia	50*
Myanmar	48*
Philippines	48*
Singapore	60
Thailand	55*
Vietnam	50*

Remark: * indicates the average weight of hen eggs with shell, based on the FAO technical conversion factors for hen eggs. The reference can be accessed via the following link: https://files-faostat.fao.org/production/QCL/Hen_Eggs_technical_conversion_ factor.pdf

N/A refers to the data that is Not Available.

ANNEX 1

Rice crop calendar (harvested month) for crop year 2025/2026 (2026) in ACO No. 36 report

Country	Season/Crop	2025						2026												2027		
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Brunei	Wet																					
	Dry																					
Cambodia	Wet																					
	Dry																					
Indonesia	Wet																					
	Dry																					
Lao PDR	Wet																					
	Dry																					
Malaysia	Wet																					
	Dry																					
Myanmar	Wet																					
	Dry																					
Philippines	Wet																					
	Dry																					
Thailand	Wet																					
	Dry																					
Vietnam	Spring - North																					
	Spring - South																					
	Autumn - North																					
	Autumn - South																					
	Winter - North																					
	Winter - South																					

ANNEX 2

Maize crop calendar (harvested month) for crop year 2025/2026 (2026) in ACO No. 36 report

Country	Season/Crop	2025						2026												2027	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Brunei	Wet																				
	Dry																				
Cambodia	Wet																				
	Dry																				
Indonesia	Wet																				
	Dry																				
Lao PDR	Wet																				
	Dry																				
Malaysia	Wet																				
	Dry																				
Myanmar	Wet																				
	Dry																				
Philippines	Wet																				
	Dry																				
Thailand	Wet																				
	Dry																				
Vietnam	1st																				
	2nd																				

ANNEX 3

Sugarcane crop calendar (harvested month) for crop year 2025/2026 (2026) in ACO No. 36 report

Country	2025				2026											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei																
Cambodia																
Indonesia																
Lao PDR																
Myanmar																
Philippines																
Thailand																
Vietnam																

ANNEX 4

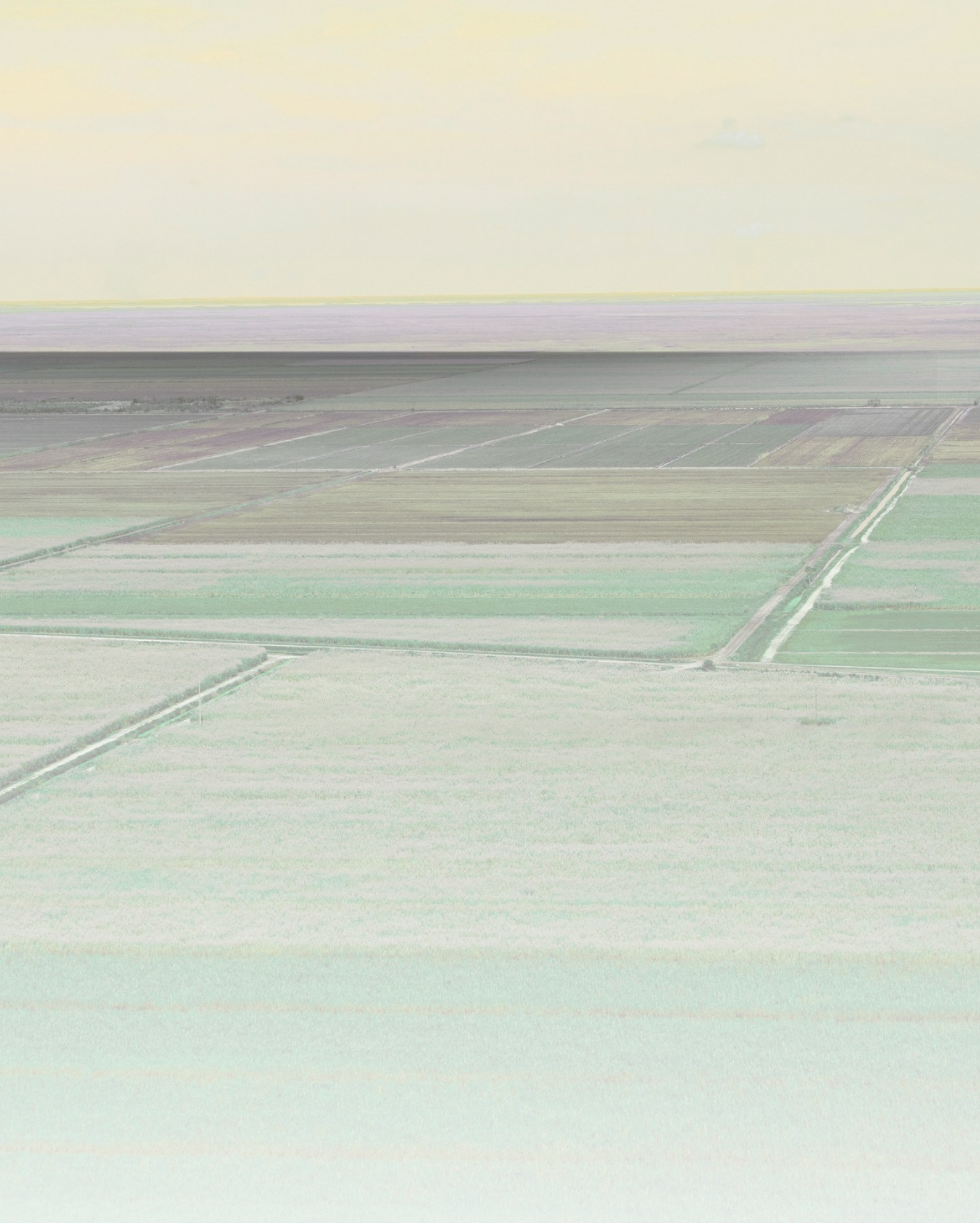
Soybean crop calendar (harvested month) for crop year 2025/2026 (2026) in ACO No. 36 report

Country	Season/Crop	2025					2026											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cambodia	Wet																	
	Dry																	
Indonesia	1st																	
	2nd																	
	3rd																	
Lao PDR	Wet																	
	Dry																	
Myanmar	Wet																	
	Dry																	
Philippines	Wet																	
	Dry																	
Thailand	Wet																	
	Dry																	
Vietnam	Wet																	
	Dry																	

ANNEX 5

Cassava crop calendar (harvested month) for crop year 2025/2026 (2026) in ACO No. 36 report

Country	Crop	2025					2026											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Brunei	-																	
Cambodia	-																	
Indonesia	1st																	
	2nd																	
	3rd																	
Lao PDR	-																	
Malaysia	-																	
Myanmar	-																	
Philippines	1st																	
	2nd																	
Thailand	-																	
Vietnam	North																	
	South																	



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