



WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

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Brunei

Brunei Darussalam builds a sustainable and robust rice industry. Brunei Darussalam is steadily intensifying its efforts to ensure a secure, self-reliant, and sustainable food system. At the heart of these efforts lies the push to enhance rice self-sufficiency, a key national priority. According to the Acting Director of the Department of Agriculture and Agrifood, the initiative has yielded positive results, with rice self-sufficiency increasing from 4 percent to 8 percent. “We aim to build a sustainable and robust rice industry that not only achieves self-sufficiency but also contributes to economic diversification and regional collaboration,” he stated. Under the government’s broader vision to position Brunei as a regional hub for hybrid rice technology, in 2025, the government signed a MoU with the Agriculture and Rural Affairs of the People’s Republic of China to establish a dedicated Hybrid Rice Research Centre in Brunei. Moreover, the government not only supports the ongoing effort to locally suit rice varieties but also includes the groundwork for domestic hybrid seed production.

Source: Borneo Bulletin. (2025, July 22). *A stronger Brunei grows.*

Indonesia

The Indonesian government has increased the rice absorption target for the state-owned logistics company Bulog. Due to the rain in 2025, the Indonesian government has increased Bulog’s rice absorption target for 2025 from 3 million tonnes

to 4 million tonnes. The target has been increased to maintain the paddy rice price and prevent them from sliding further. Moreover, Bulog’s budget has been increased to accommodate the planned purchase of 1 million tonnes of rice at 12,000 IDR (0.74 USD) per kilogramme. According to the Minister of Agriculture, Bulog’s warehouses are ready to store the additional government rice reserves because the National Food Agency is currently distributing rice for the 10-kilogramme rice assistance to 18.27 million beneficiaries.

*1 USD = 16,301.70 IDR

Source: ANTARA News. (2025, July 18). *Bulog’s rice absorption target raised by 1 million tons.*

Thailand

The United States of America (USA) tariff would have severely affected Thai rice exports.

According to the Thai Rice Exporters Association (TREA), the USA’s 36 percent tariff would have a drastic impact on Thai jasmine rice prices, as the USA is the largest export market for Thai jasmine rice. Due to the tariff, Thai jasmine rice prices rose from 1,100 USD per tonne to 1,496 USD per tonne. Meanwhile, Vietnam’s high-quality jasmine rice is 900 USD per tonne. Even if it were with a 20 percent tariff applied, the same as Viet Nam, the price would be 1,080 USD, widening the price gap. This may encourage more USA buyers to purchase Vietnamese rice and potentially reduce Thailand’s share of the USA jasmine rice market. Finding new markets poses a challenge as Thai rice consistently has higher prices than its competitors. In the first half of 2025, Thailand exported only 3.6 million tonnes of rice, which is a 30 percent decrease from 2024. TREA predicted that Thailand’s total rice exports will not meet the 7.5-million-tonne target. In contrast, Vietnam managed to export 5.2 million tonnes during the same period.

Source: Bangkok Post. (2025, July 21). *All hands on Deck.*

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