



WEEKLY UPDATE ON ASEAN PLUS THREE RICE SITUATIONS

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The Philippines

The Philippines is considering extending the rice import ban.

The Philippines may extend its rice import ban until the end of 2025 to protect farmers after local paddy prices plunged to 6 PHP (0.10 USD) per kilogramme, a decline from 14 – 17 PHP (0.24 – 0.29 USD) per kilogramme. The rice import ban programme, initially intended as a temporary two-month measure, could become a long-term policy if approved. It aims to stabilise local prices through government grain purchases, warehouse expansion, and the setting of a minimum floor price. As of September 1, 2025, the country's rice reserves reached 2.07 million tonnes, up 25 percent year-on-year. Authorities are also weighing higher import tariffs and restrictions on the use of imported rice by state agencies. Manila's decision to extend the import ban has rattled the global rice market, given the Philippines' dominant role in world demand. The ban has already affected Vietnam, the Philippines' main supplier, with export volume and value down 43 percent and 55 percent year-on-year last month.

*1 USD = 58.08 PHP

Source: Tuoi Tre News. (2025, October 13). *Philippines may extend rice import ban until end-2025, putting pressure on Vietnamese exports.*

Viet Nam

Viet Nam's rice prices fall as the country enters the winter-spring season. Viet Nam faces significant downward pressure ahead, as the country enters the winter-spring harvest season. According to Viet Nam Food Association (VFA), Viet Nam's 5-percent

broken rice price is quoted at 450 USD per tonne, Jasmine rice at 490 USD per tonne, and 100-percent broken rice falls to 310 – 314 USD per tonne. Viet Nam's rice exports in September 2025 dropped sharply due to the Philippines' import ban, with 466,800 tonnes in volume and 232 million USD in value, a decline of 43 percent and 55 percent from 2024, respectively. Moreover, from the first quarter to the third quarter of 2025, Viet Nam exported 6.83 million tonnes of rice worth 3.49 billion USD, down 2 percent in volume and almost 20 percent in value and an average export price is \$509 per metric ton, among the lowest in recent years. If the Philippine import ban remains in place through late 2025, Vietnamese rice prices may fall further, especially during the peak harvest early next year.

Source: Tuoi Tre News. (2025, October 13). *Philippines may extend rice import ban until end-2025, putting pressure on Vietnamese exports.*

Japan

Japan's 2025 rice production is forecast to reach 7.8 million tonnes.

According to the Ministry of Agriculture, Forestry and Fisheries (MAFF), Japan's 2025 rice harvest is projected at 7.48 million tons, a 10 percent increase from 2024 and the highest in nine years. The rice production is expected to exceed 7 million tonnes. The estimated volume is based on the amount of rice harvested and the number of preharvest rice ear counts as of September 25, 2025, when 60 percent of rice cropping had been completed in the country. The latest harvest estimate suggests the possibility of the rice supply excess expanding further. However, it remains to be seen whether retail rice prices, which have risen due to higher advance payments to producers from agricultural cooperatives, will decline.

Source: The Japan News. (2025, October 11). *2025 Japan Rice Harvest Seen Rising to 7.48 Million Tons.*

Gathered by the APTERR Secretariat
Tel: +66 (0) 2579 4816-17 Fax: +66 (0) 2579 4840
Email: phattaranan.jir@apterr.org
Website: <http://www.apterr.org/>

* This Weekly Update on ASEAN Plus Three Rice Situations is based on all available sources during the period and may be missing some important facts. The APTERR Secretariat shall take no responsibility for data accuracy in this publication and any consequence of their use.