

RICE MARKET REPORT

"An In-Depth Analysis of Global Rice Markets and Trends"

Monthly report ***"June 2025 Edition"***

Dated: 15th June 2025



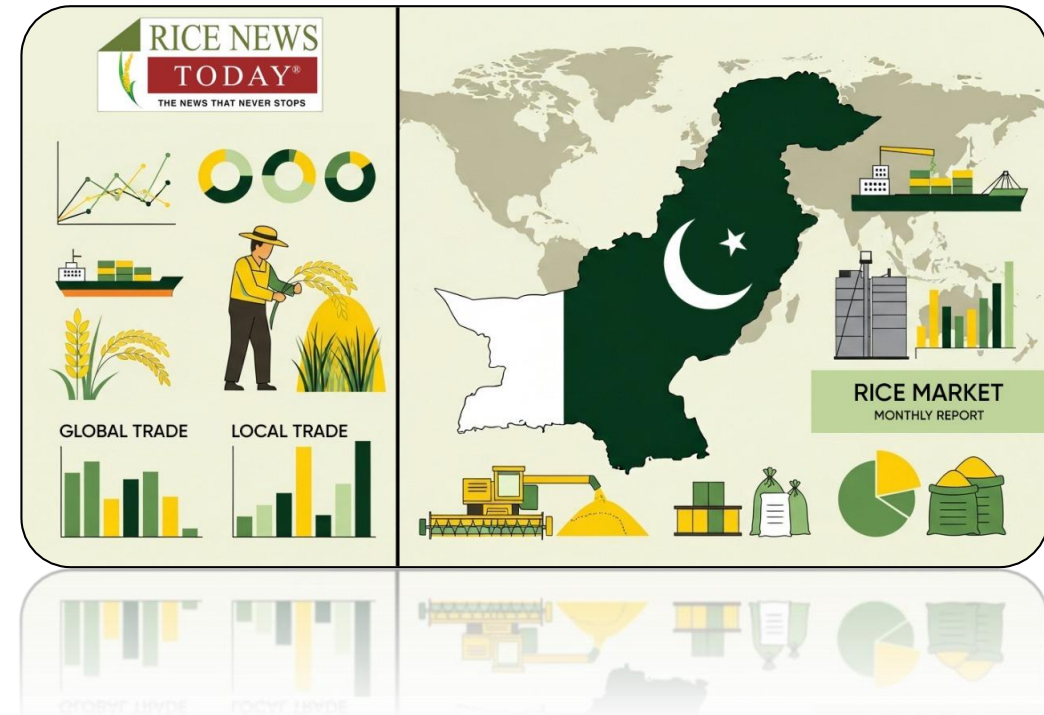
CONTENT COVERED IN THIS REPORT

Welcome to **RNT (Weekly market report)** on the rice sector, with a special emphasis on **Pakistan's role** in the global market.

List of Topics:

This report will cover the following topics:

1. Traditional & Emerging Basmati varieties
2. Top 10 Basmati Rice Import Markets
3. Pakistan Rice Exports To World & Major Destinations (**Basmati**)
4. Traditional & Emerging Non-Basmati varieties
5. Pakistan Rice Exports To World & Major Destinations (**Non-Basmati**)
6. Pakistan Month-wise Rice Exports Comparison (**2024 & 2025**)
7. Registered Varieties of Pakistan Being Traded
8. Comparison of Global Rice Prices
9. **PAKISTAN RICE SECTOR** – Key highlights
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12. Upcoming Global Rice Events



Mapping Traditional and Emerging Import Markets for Pakistani Basmati Rice

TRADITIONAL BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Europe & UK	UK, Italy, Belgium, Netherlands, Germany	~67% share in brown Basmati segment (Mar 2025); zero-duty access; strong price premium
GULF & Middle East	UAE	One of the largest buyers; consistent demand for both traditional and premium Basmati
	Saudi Arabia	Traditional buyer; increasing demand for aged and aromatic varieties
	Iran	Resumed barter trade in FY2024–25 ; vital buyer despite logistical challenges
	Oman, Qatar	Smaller but steady volumes; part of GCC distribution hub
Africa	Kenya	Key African market; mix of basmati and non-basmati shipments
North America	USA, Canada	Premium segments; niche organic, low-residue demand

EMERGING BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Southeast Asia	Malaysia	Increased interest post-India disruption; mix of retail and industrial buyers
	Indonesia	Imported both parboiled and aromatic rice; rising demand
	Philippines	New entry point with public-sector imports
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025; includes premium varieties
East Asia	China	Importing broken rice & trying Basmati blends; demand rising for aromatic, cost-efficient varieties
Africa	Somalia, Benin, Ghana	Expanding trade networks; growing basmati interest among traders
Central Asia	Uzbekistan, Kazakhstan	Untapped retail potential; test shipments reported by REAP
Middle East	Iraq, Syria	Post-conflict markets seeing gradual rice import growth

Top 10 Import Markets of Pakistani Basmati Brown Rice

Rank	Country	Estimated Share	Key Notes
1	United Kingdom	~24%	Largest market; high demand for low-residue, organic-compliant rice
2	Italy	~21%	Major retail and ethnic food sector buyer
3	Netherlands	~13%	Hub for EU distribution; increasing organic imports
4	Belgium	~12%	Active in brown rice reprocessing and EU redistribution
5	Spain	~11%	Retail-focused imports for value chains and supermarkets
6	Portugal	~5%	Growing demand in Portuguese ethnic retail sector
7	United States	~3%	Niche demand for organic and ethnic store chains
8	Denmark	~2.5%	Imports for both ethnic and sustainable food segments
9	Poland	~2%	Mid-sized volume; retail and food processing sector
10	France	~1.5%	Small but steady importer of low-pesticide brown rice

Estimated based on REAP, Volza, and COMTRADE shipping data from 2023–24. Country-level FY2024–25 stats to be confirmed post PBS/TDAP release.

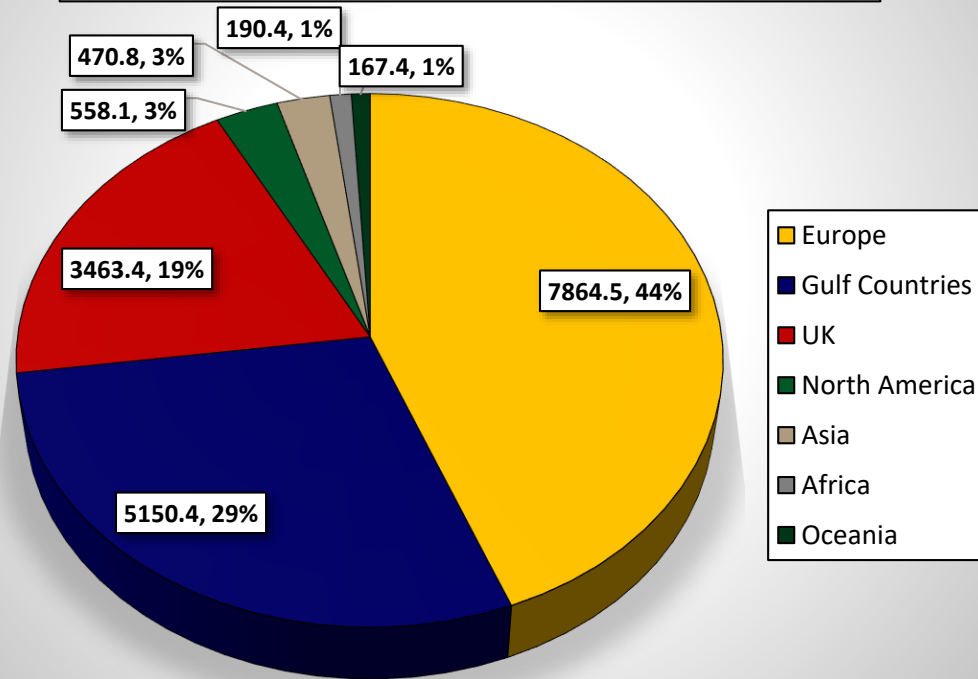
- These countries collectively account for ~90%+ of Pakistan’s **Basmati brown rice exports**.
- **EU** and **UK** remain critical due to zero-duty access and preference for brown rice in retail and processing chains.
- Early **FY2024–25** data (**Jul–Aug**) confirms **86,761 MT** of brown rice exports to **32 countries**, with these **10** leading the volume share.

SUPER BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS

Super Basmati Rice Exports to the World

Super Basmati Exports in **May 2025**

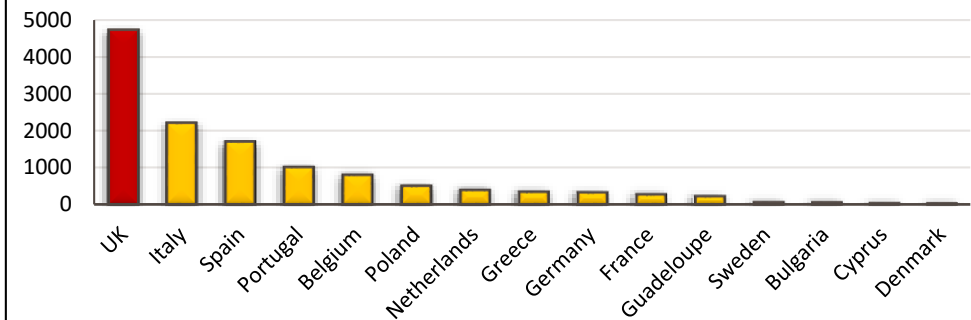
(Quantity in MT)



"Please note: Export data is compiled from third-party sources and may include minor discrepancies."

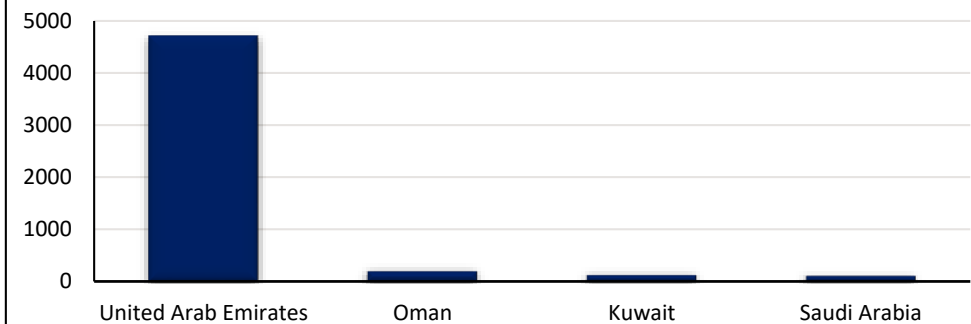
Super Basmati Rice Exports to UK & EU

(Quantity in MT)

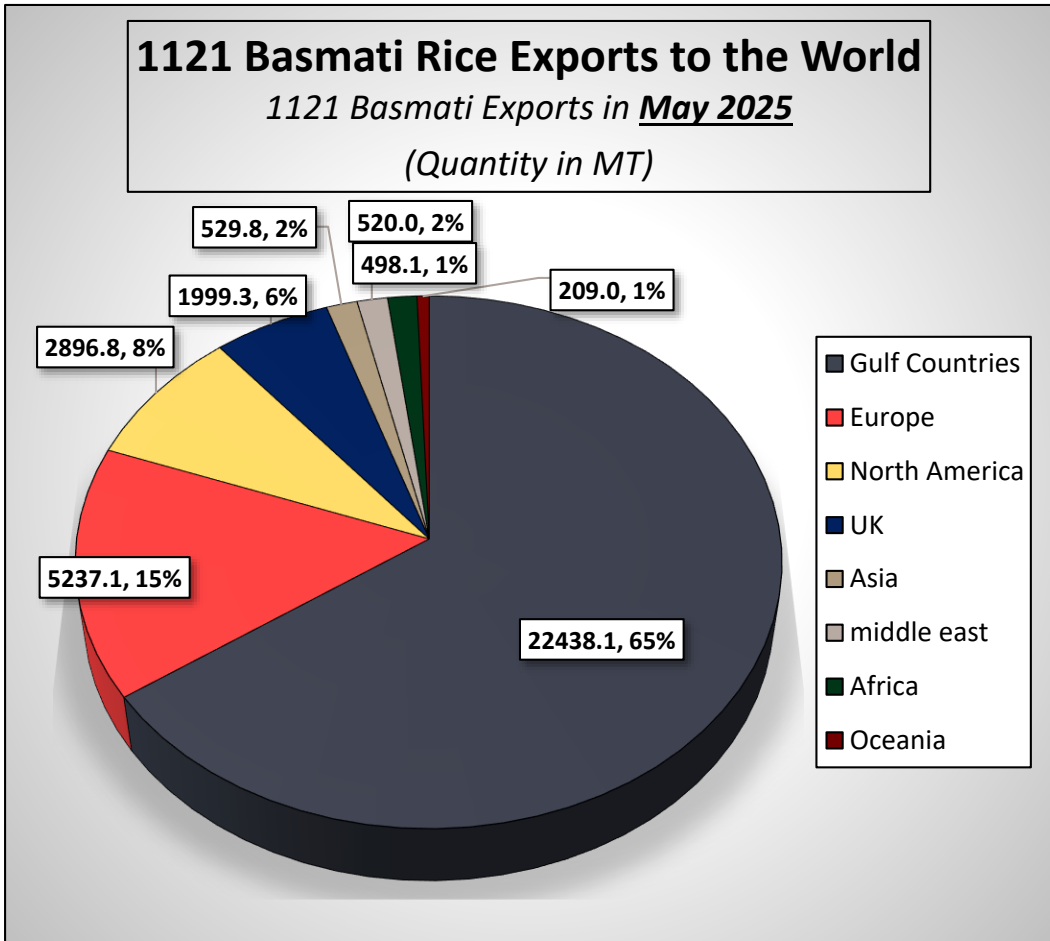


Super Basmati Rice Exports to GULF

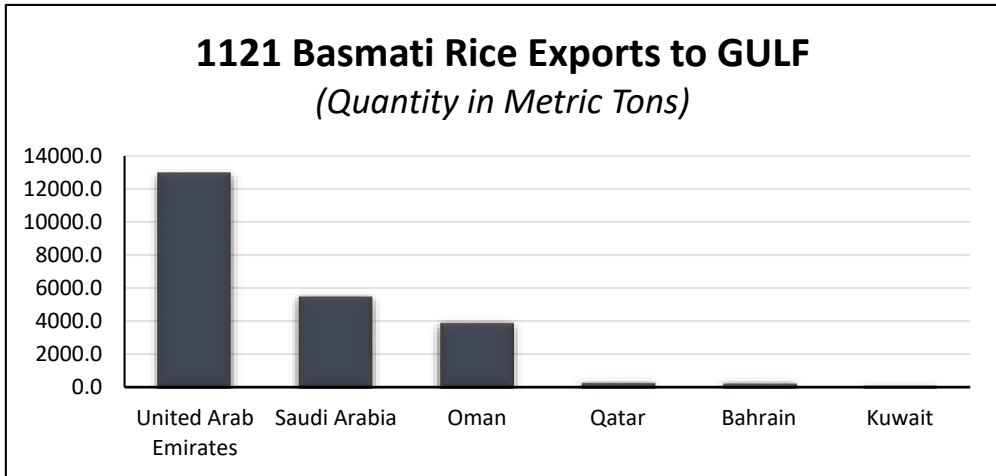
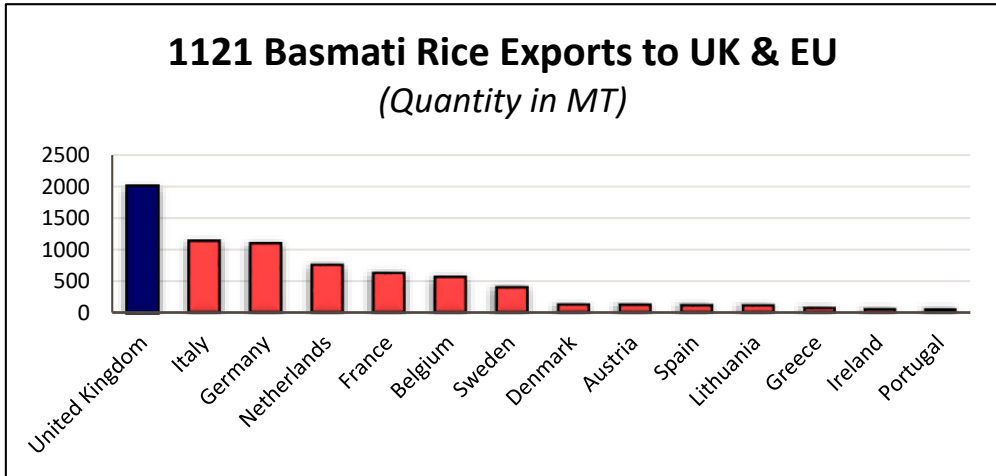
(Quantity in Metric Tons)



1121 BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from third-party sources and may include minor discrepancies."

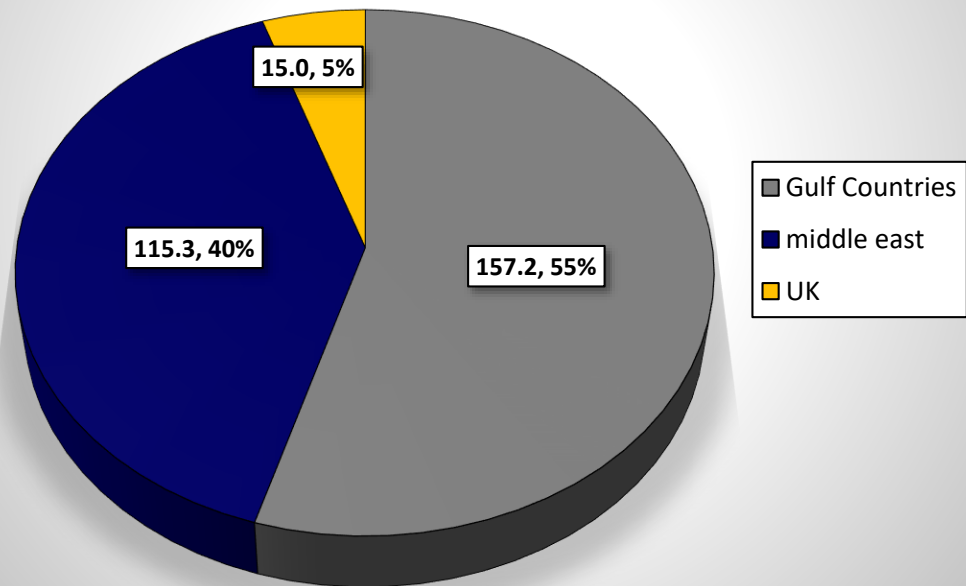


1509 BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS

1509 Basmati Rice Exports to the World

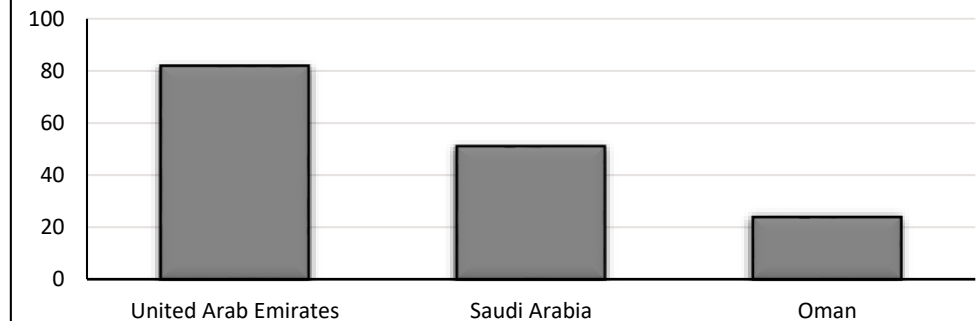
1509 Basmati Exports in **May 2025**

(Quantity in MT)



1509 Basmati Rice Exports to GULF

(Quantity in Metric Tons)



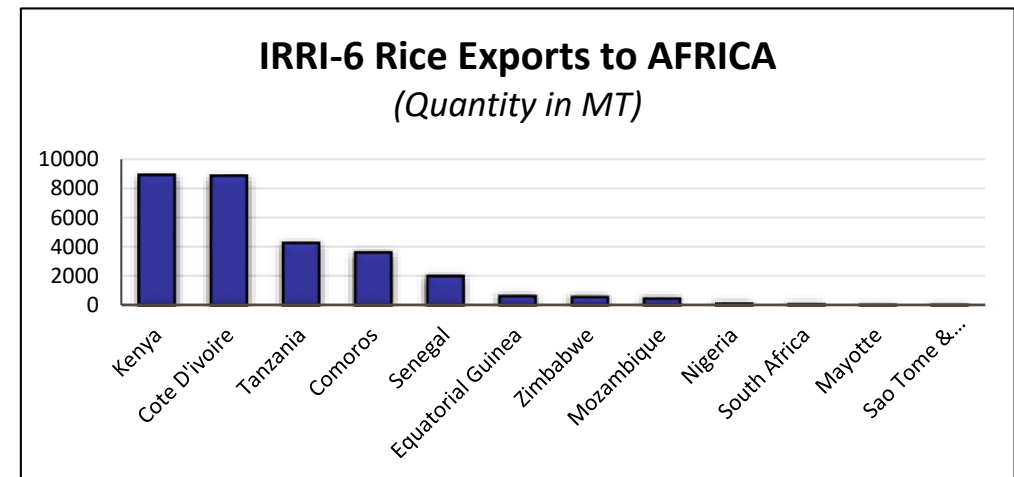
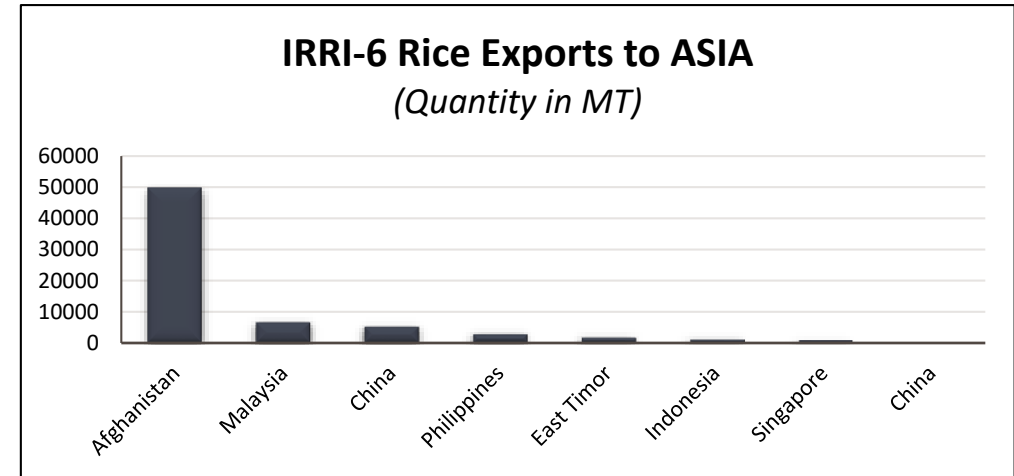
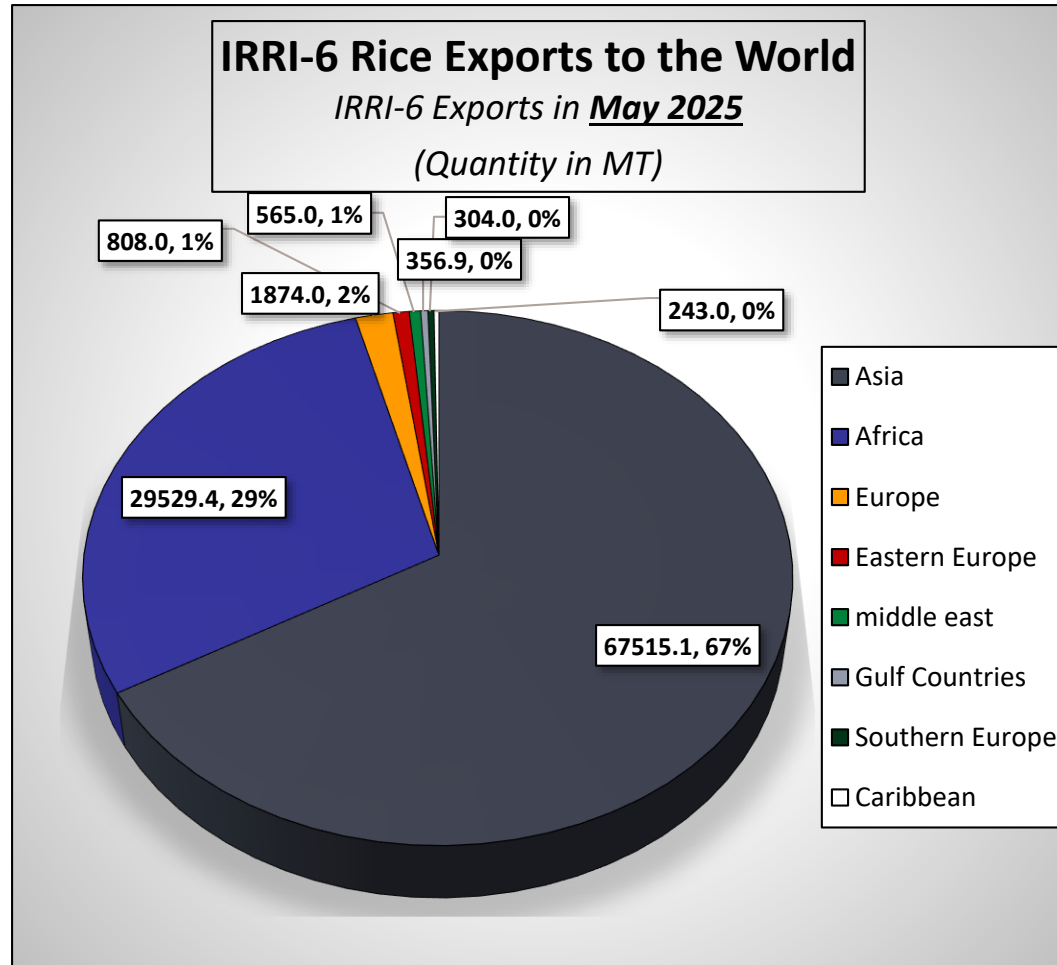
"Please note: Export data is compiled from third-party sources and may include minor discrepancies."

Mapping Traditional and Emerging Import Markets for Pakistani Non-Basmati Rice

TRADITIONAL NON- BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Africa	Kenya	Major buyer (~108,000 MT Jul–Mar 2024); consistent demand for white and broken rice
	Madagascar, Djibouti, Cote d'Ivoire	Long-time importers; price-sensitive markets with repeat tenders
GULF & Middle East	Iran	Imports IRRI and parboiled rice; trade through barter and private deals
	UAE, Saudi Arabia	Steady demand for IRRI and parboiled for labor camps, hotels, food service
South Asia	Afghanistan	Dependable market via border trade; imports mainly IRRI-6 and Sella rice
Southeast Asia	Malaysia	Has imported both IRRI and parboiled rice from Pakistan for public tenders

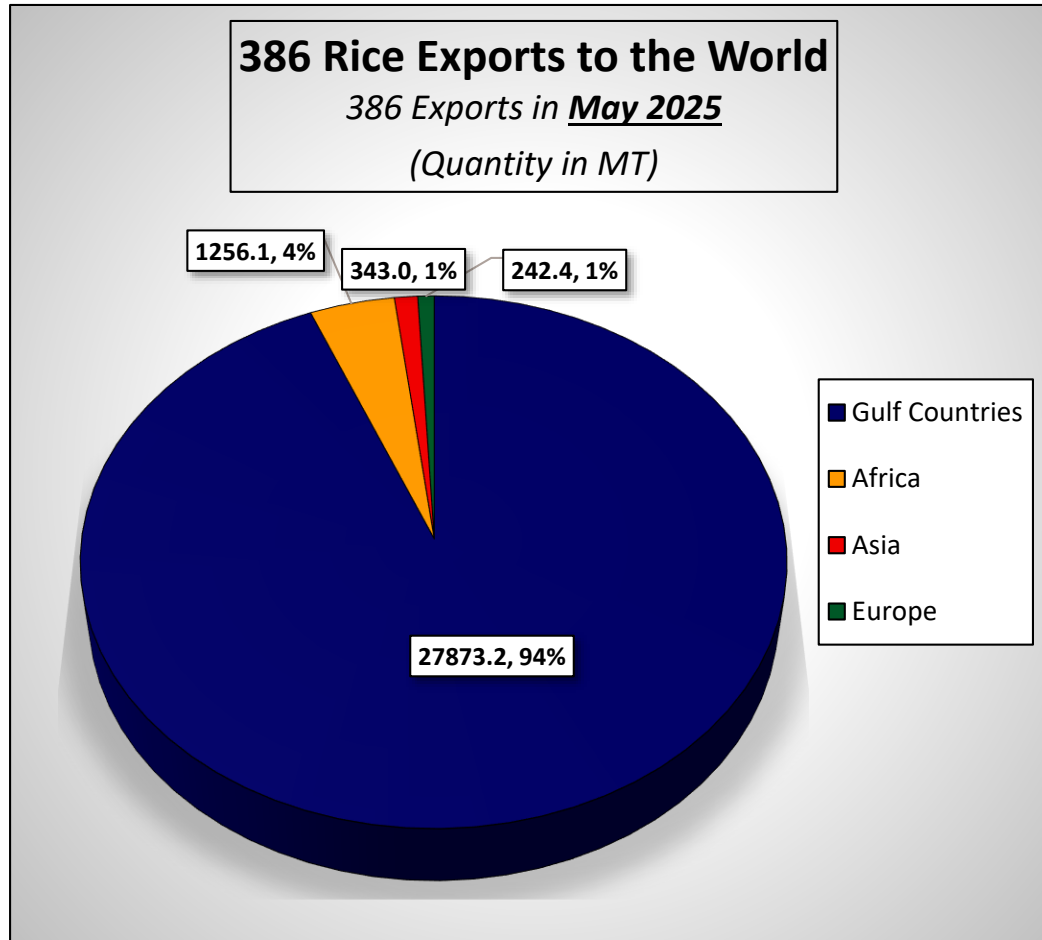
EMERGING NON-BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025 ; imports include parboiled and white rice
Southeast Asia	Indonesia	Govt. tenders led to ~61,000 MT import in 2023–24 ; continued interest in 2025
	Philippines	Public-sector rice procurement underway
Africa	Benin, Ghana, Nigeria	Strong demand for IRRI-6 and white rice via bulk shipments
Far East Asia	China	5% broken rice and IRRI-6 for feed and processing; price-efficient preference
Central Asia	Uzbekistan, Tajikistan	Trial shipments underway; retail and wholesale demand rising
Latin America	Mexico, Cuba (exploratory)	Initial interest building through bilateral talks

IRRI-6 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS

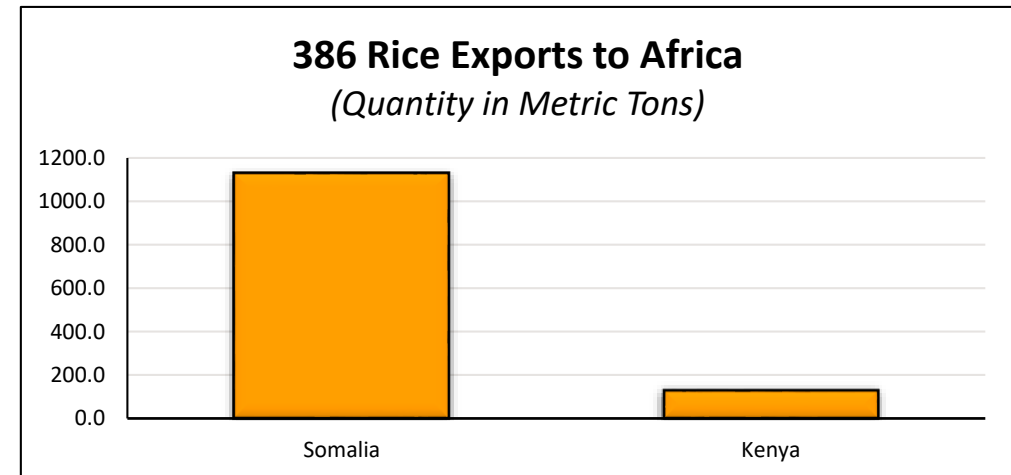
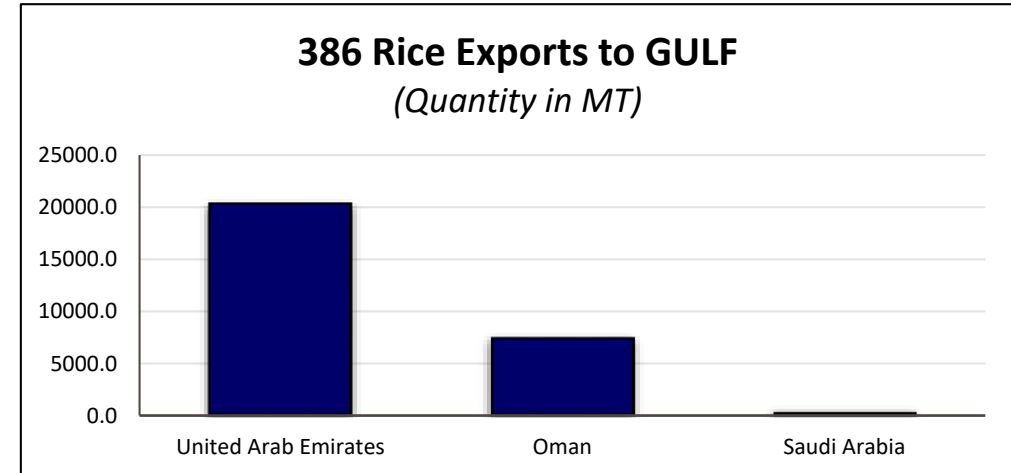


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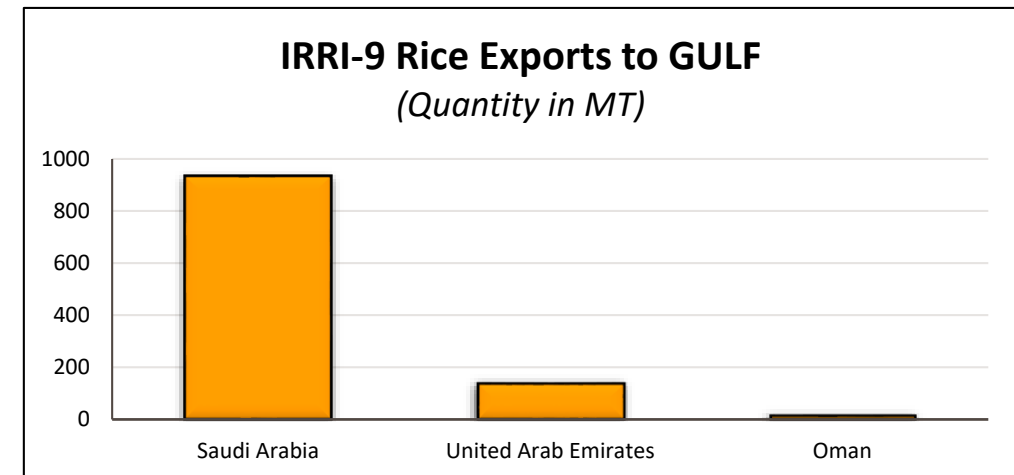
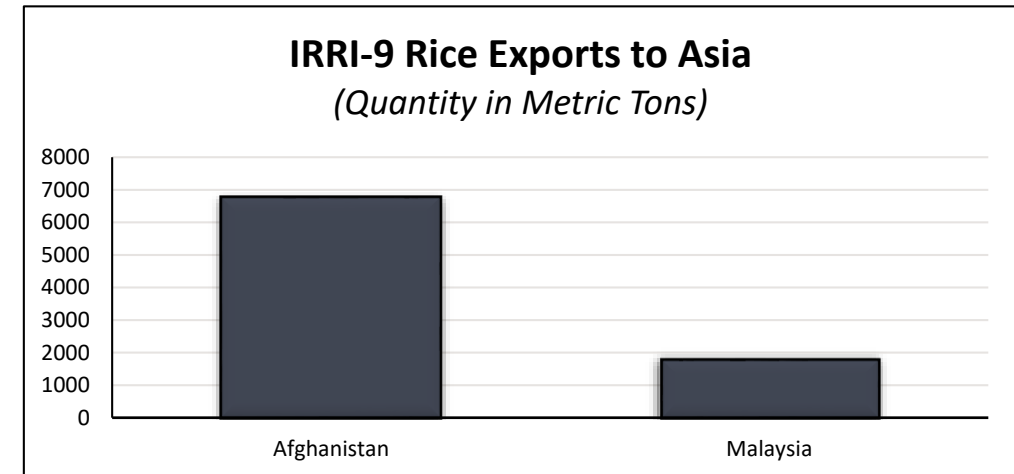
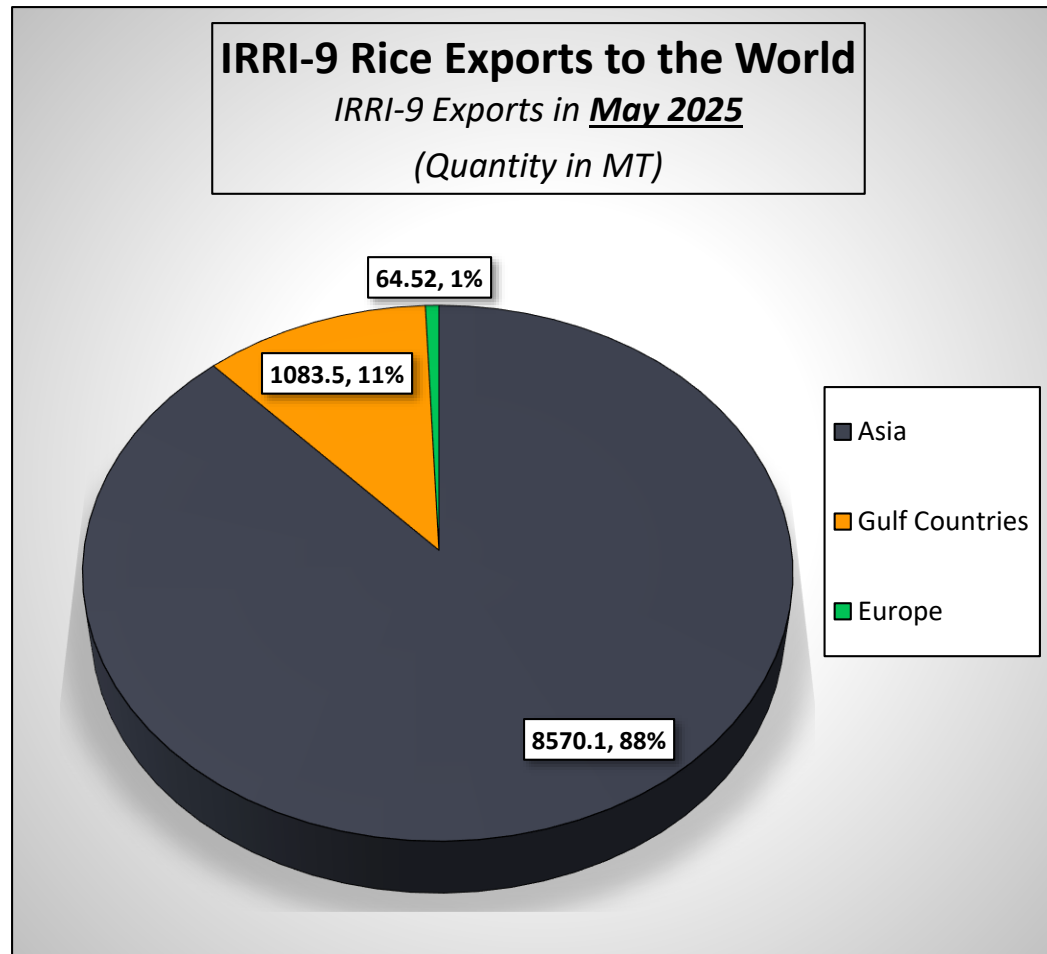
386 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from third-party sources and may include minor discrepancies."



IRRI-9 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from third-party sources and may include minor discrepancies."

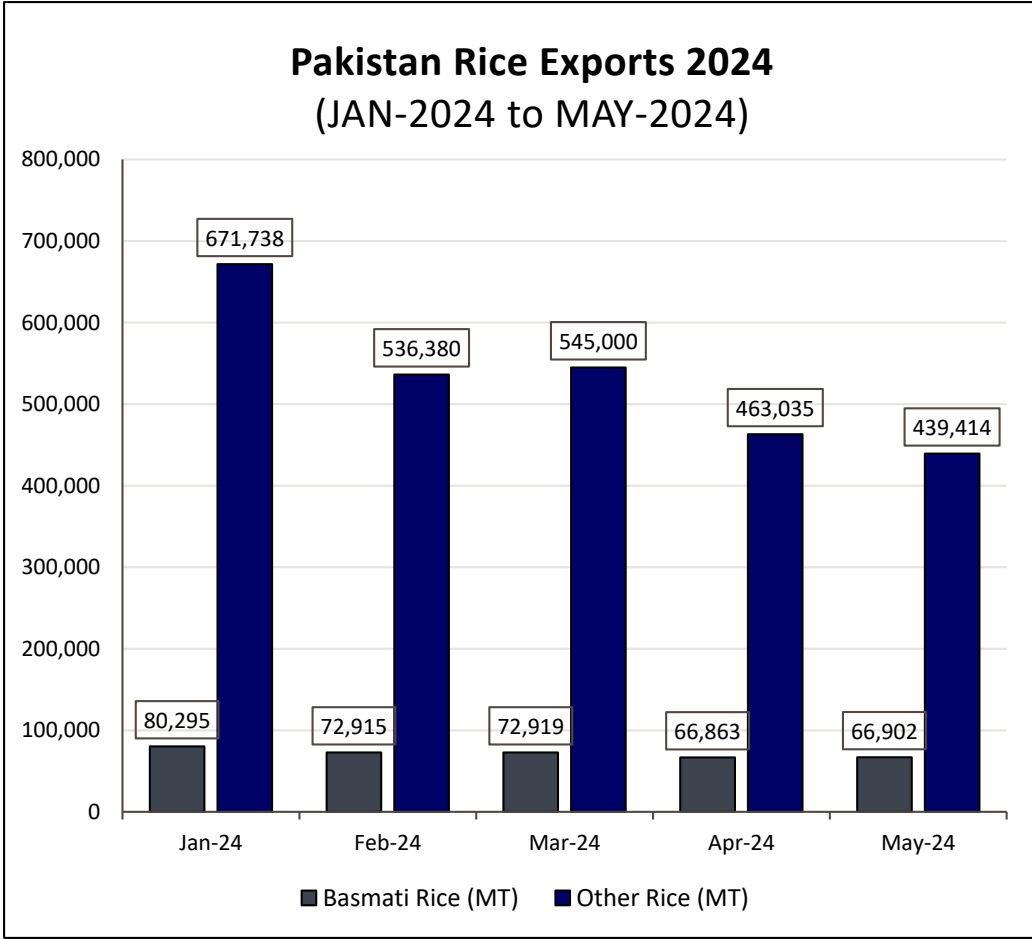
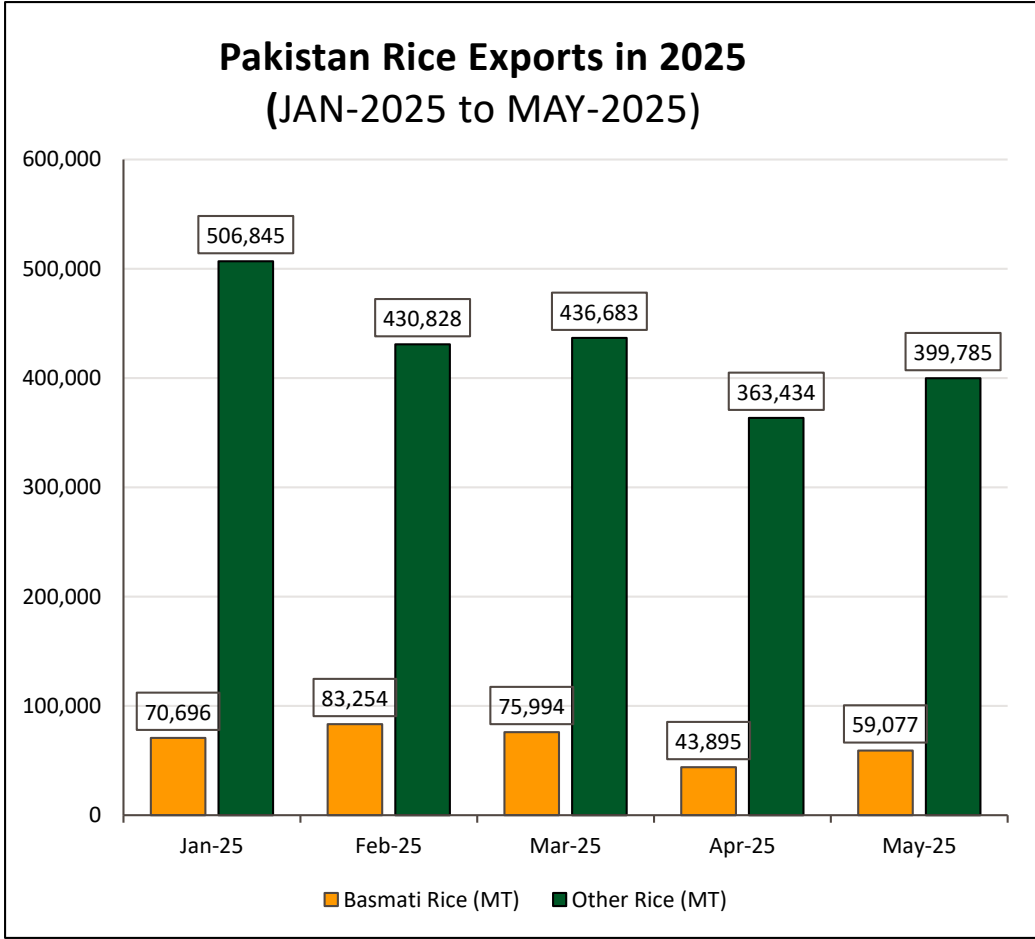
APPROVED BASMATI & NON- BASMATI VARIETIES OF PAKISTAN

APPROVED BASMATI VARIETIES	
Basmati -370	Kissan Basmati
Basmati C 622	NIAB Basmati 2016
Sultan Super Basmati	Noor Basmati
Basmati 198	Super Gold
Basmati 385	Super Basmati 2019
Super Basmati	NIBGE Basmati 2020
Basmati 2000	PK 2021 aromatic
Shaheen Basmati	KSK 111 H
Basmati 515	Sona Super Basmati
PK IRRI-6 aromatic	Vital Super Basmati
Punjab Basmati	NIAB HT 39
NIAB HT 18	NIAB S-39
GUARD 101	NIAB Super
Chenab Basmati	NIAB Basmati-2016

APPROVED NON-BASMATI VARIETIES	
IRRI-6	IRRI-9
KSK- 282	NIBGE GSR 8
KSK- 133	SKCB – 370-5-32
NIAB IRRI-9	
NIAB 2013	
KSK- 434	
NIBGE -5	
NIAB ST-9	
NIAB IRRI – 195	
KSK- 706	
NIBGE GSR 6	
NIBGE GSR 7	

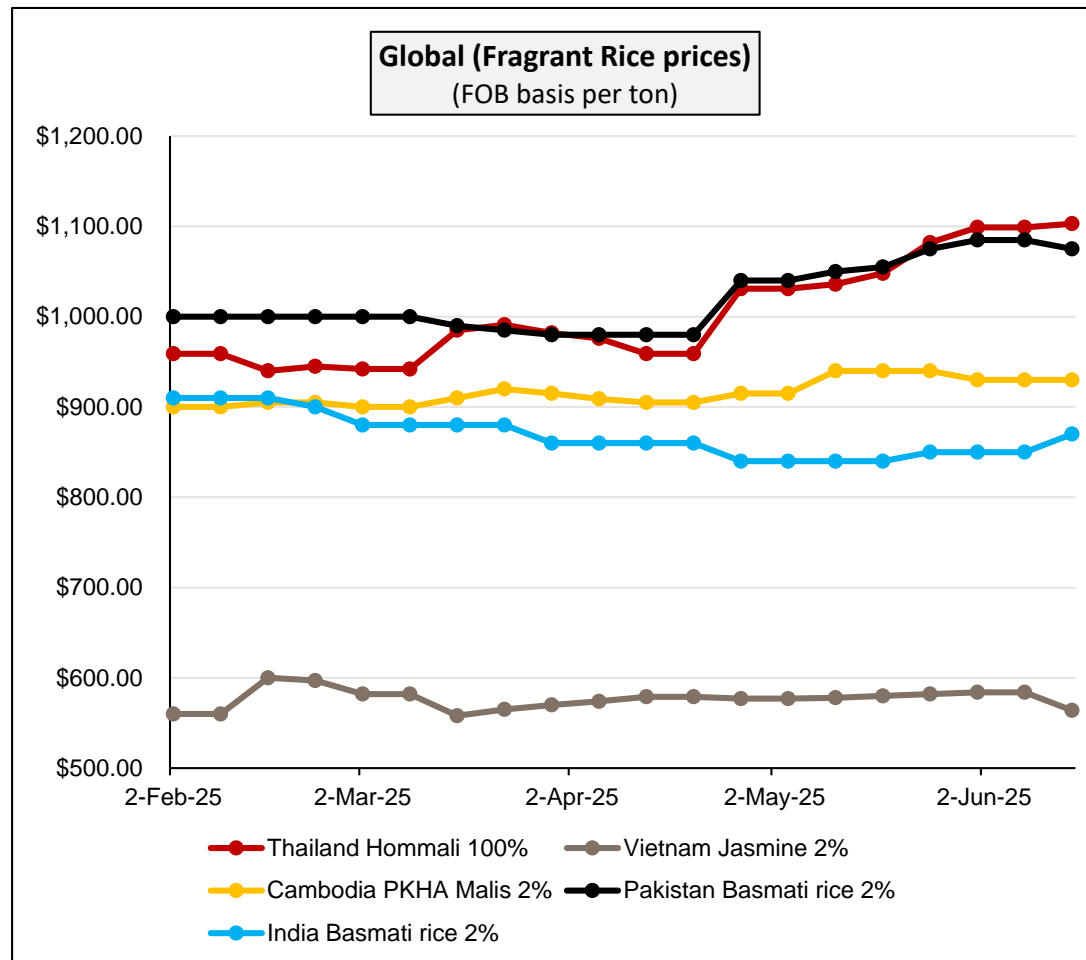
Source: [Approved Basmati Rice Varieties](#)
[Approved Non-Basmati Rice Varieties](#)

PAKISTAN RICE EXPORTS COMPARISON: (2024 & 2025)

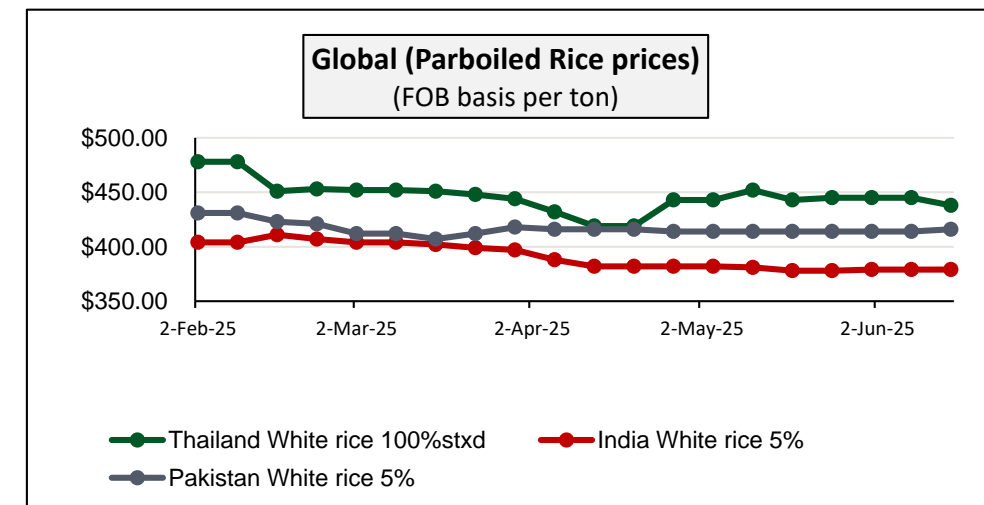
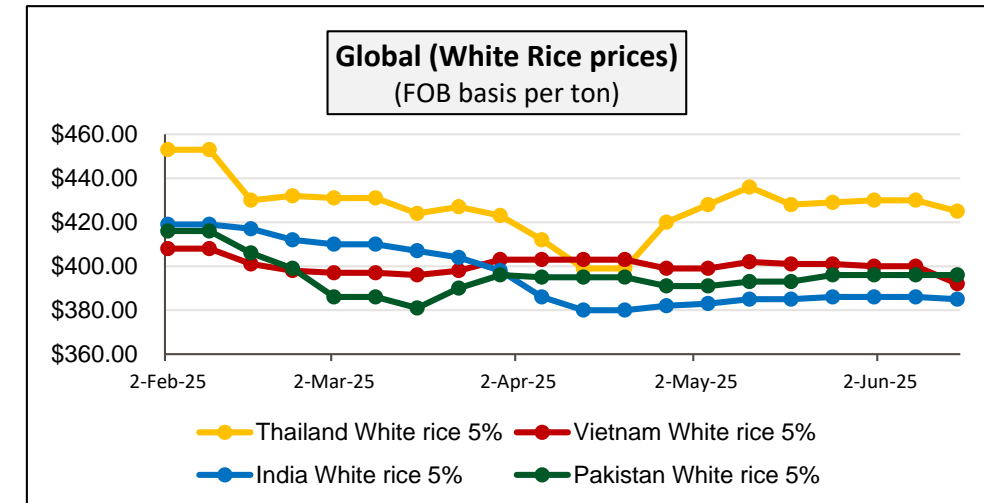


Source: Pakistan Bureau of statistics

COMPARISON OF VARIOUS GLOBAL RICE PRICES:



Source: TREA (Thailand)



PAKISTAN RICE SECTOR – Key highlights for (June 2025)

The following points summarize key developments in Pakistan's rice sector as reported in various news sources during June 2025:

- Amid growing quality issues and delays in inspections, the National Assembly Standing Committee urged tighter checks on rice consignments, pushing the **Department of Plant Protection** to strengthen its container protocols and safeguard trade credibility.
- **Pakistan Kissan Ittehad** sounded the alarm over a deepening **agri-crisis**, demanding fair commodity pricing and support mechanisms — a move that could stabilize the struggling rice sector, which faces rising input costs and pricing uncertainty.
- Punjab launched a province-wide initiative to uplift rice productivity through mechanization, introducing thousands of seeders and transplanters while pledging stricter pesticide controls and stakeholder-driven policy planning.
- Despite India's re-entry with heavy subsidies and undercut pricing, Pakistan's rice exports remained stable at **5.54 million tonnes** in **FY25**. But a dip in **Kharif 2024** output is expected to cut **Q2 2025 exports by 15%**.
- Pakistan's rice exports to **China surged 121% in early 2025**, driven by demand for semi- and fully-milled varieties like **Super Basmati** and **IRRI-6** — favored for their yield, aroma, and suitability in food processing and retail.
- Ahead of the federal budget, rice prices in Rawalpindi wholesale markets jumped by **Rs400 per bag** due to reduced supply, rising transport costs, and new taxes — intensifying inflationary pressure on local consumers.



“Iran–Israel Conflict Disrupts Basmati Trade: Pakistan Gains Ground as India Faces Delays and Losses”

- Escalating tensions between **Iran and Israel** in **June 2025** disrupted vital shipping routes through the **Strait of Hormuz**, causing **Indian Basmati exporters** to panic as over **1 lakh tonnes of rice shipments** to Iran were held up at **Kandla and Mundra ports**.
- Payment delays worsened the crisis, with nearly **₹2,000 crore** stuck for previously shipped consignments and long credit cycles pushing **Indian exporters** into serious cash flow troubles. Rising freight costs and war-risk insurance premiums only added to their burden.
- Despite the turmoil, **India’s Basmati exports to Iran** may still touch last year’s **0.86 million tonnes**, as most deals were locked in before **July**. However, Iranian buyers paid lower rates — averaging **\$746/tons in April** — well below prices from other markets.
- Meanwhile, **Pakistan** capitalized on the chaos, expanding its rice footprint in **Iran** through land-border barter trade involving petroleum, copper, and electricity. Without banking barriers and maritime delays, **Pakistani rice** moved faster and more competitively.
- As India grapples with pending dues and disrupted logistics, experts are urging a strategic rethinking of **Basmati trade** policy in West Asia. For now, **Pakistan’s** agile response is giving it the upper hand in a traditionally **India-dominated market**.



MAJOR GLOBAL NEWS HIGHLIGHTS OF (June 2025):



- As per the news, **In June 2025**, India reported record foodgrain production of **354 million tons for 2024–25**, up **6.6%** from last year, driven by bumper harvests of **rice (149.07 mt)**, wheat (**117.5 mt**), maize, and oilseeds.
- The government credited supportive **MSP** policies, timely fertilizer supply, and favorable weather. Projections for **2025–26** also indicate another record season, with **rice output expected to reach 151 mt** and wheat at **117.5 mt**, backed by steady acreage and improved yields. Despite high domestic stocks, global rice trade remained slow due to weak demand and oversupply.
- Meanwhile, Japan's severe rice inflation and structural production challenges have opened a potential **export opportunity** for India. With Japan planning to boost imports, India could expand beyond **Basmati** and supply suitable **non-Basmati sticky rice varieties** like **Joha** from the Northeast, supporting farmers and reducing the trade deficit with Japan.

Source: News & Publications



- **In June 2025**, Vietnam's rice sector grappled with regulatory shifts and price volatility. A new draft decree proposes mandatory stockpiling of **1,250 tons** and warehouse ownership for rice exporters — measures the business community warns will raise operational costs and hinder market access for new players.
- Meanwhile, export volumes rose **12.2% year-on-year** in the first five months, reaching **4.5 million tones**, but average export prices fell sharply by **18.7% to \$516/tones**, dragging export value down **8.9%**.
- Domestically, Mekong Delta paddy prices remained stable, while high-grade rice like **ST 25** retained premium values. The Philippines remained Vietnam's top buyer, though import value dropped. In contrast, exports to **Bangladesh** surged over **500-fold**, while shipments to China also rose significantly. Amid rising global supply and cautious demand, Vietnam is refocusing on high-end markets like Japan and Europe to sustain competitiveness.

Source: News & Publications

MAJOR GLOBAL NEWS HIGHLIGHTS OF (June 2025):



- In **June 2025**, Thailand intensified efforts to promote its high-quality rice varieties, **including jasmine, organic, and GI-certified types**, through the 10th Thailand Rice Convention, where officials expect **over 100,000 tones** in export deals worth **2 billion baht**.
- The government maintained its **2025 rice export** target at **7.5 million tones**, despite a **30%** year-on-year drop in export volume and a **34%** decline in value during **January–April**. Hom Mali and parboiled rice exports showed modest gains, while white rice and broken rice exports fell sharply.
- Meanwhile, rice shipments to **China** surged **77.7%** in volume and **31.3%** in value over the same period, driven by favorable trade terms and strong demand. Officials remain cautiously optimistic amid concerns over **India's re-entry** into the global market and currency fluctuations, with a strategic focus on high-purchasing-power markets like **China, the EU, Japan, and the Middle East**.

Source: News & Publications



- In **June 2025**, **Indonesia** achieved a historic milestone by securing over **4 million tones** of government rice reserves — the highest in **57 years** — reflecting strong national food governance and improved farmer welfare.
- Agriculture Minister Andi Amran Sulaiman credited strategic policies, land expansion, subsidized fertilizers, and widespread distribution of machinery for a projected **11.17% year-on-year** increase in rice production, reaching **18.76 million tones** in **H1 2025**.
- Bolstered by this surplus, Indonesia announced **10,000 tones** of rice aid to Palestine and expressed openness to regional rice export collaborations, including with Malaysia. The government views these developments as a testament to self-reliance and a foundation for broader food diplomacy.

Source: News & Publications

UPCOMING EVENTS:



The Federation of the European Rice Millers

The next FERM Convention will take place in **Marbella**, Spain

10-12 September 2025

HOTEL DON CARLOS MARBELLA, SPAIN



2025 International World Rice Conference

Phnom Penh, Cambodia

Date & time: November 6 · 10am – November 9 · 5pm GMT+7

Location: Shangri-La Phnom Penh Village No 14, Sam Dach Hun Sen Road Tonle Bassac Commune, Chamkarmorn Phnom Penh, Phnom Penh 120101 Cambodia

Address: '5 Star' Shangri-La Hotel

For more details, please click here: [Global Rice Events](#)



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