

# RICE MARKET REPORT

Volume: 25

Dated: 25<sup>th</sup> July 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:**

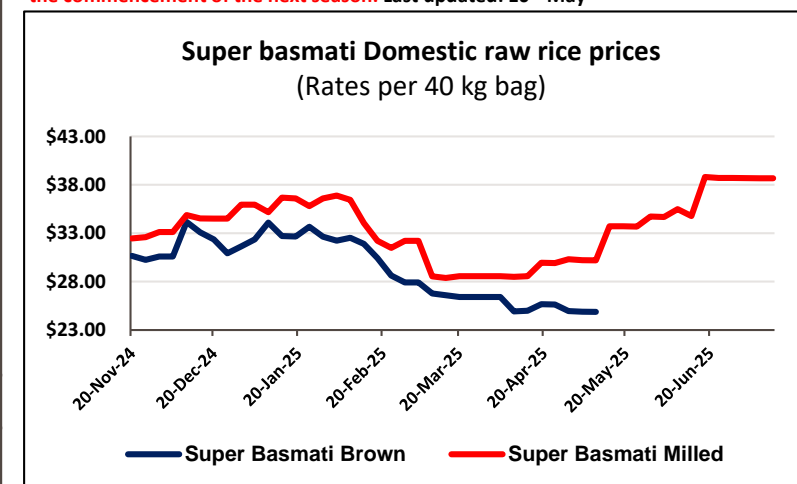
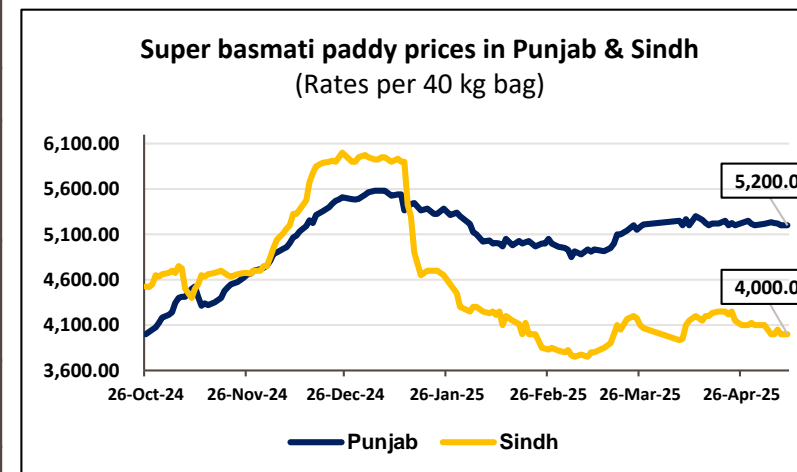
1. Major rice varieties grown in Pakistan (**Basmati & Non-Basmati**).
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# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Basmati)

(Production, consumption, supply and Demand)

Super Basmati		
Growing Region	Punjab: Major quantity	Sindh: Relatively good quantity
Production Area	<b>Punjab:</b> 17% Decline in area <b>2024-25:</b> 13,13,000 Acers <b>2023-24:</b> 15,78,000 Acers	<b>Sindh:</b> N/A
Quality of the crop year (2024-25)	<b>Punjab:</b> Good Quality followed by previous year crop, low yield in some areas.	<b>Sindh:</b> Cracks in grains, high broken% due to high temperature and low irrigation.
Variants Available	<ul style="list-style-type: none"> <li>Super basmati brown</li> <li>Super basmati milled</li> <li>Super basmati parboiled brown</li> <li>Super basmati parboiled Milled</li> </ul>	
Major Markets	Europe, Gulf region and UK.	
Supply and Demand	<ul style="list-style-type: none"> <li>We learned that, <b>Rice mills</b> in Pakistan gear up for the upcoming harvest season, stock levels vary across regions. In <b>Punjab</b>, Super Basmati stocks are available for <b>brown rice</b>, while <b>Sindh</b> still holds ample reserves of <b>brown rice</b> and <b>paddy</b>.</li> <li>Despite overall rice exports declining by <b>14.72%</b> during <b>FY2024-25</b>, <b>Basmati exports</b> rose by <b>4.48% in volume</b>, with <b>China</b> emerging as a key growth market.</li> <li>Domestically, <b>Super Basmati milled</b> prices have remained stable.</li> <li>Meanwhile, <b>Sowing</b> is being completed in punjab areas, recent monsoon rains are proving beneficial for crop development, but experts warn that potential flooding could pose a serious threat to the standing crop.</li> </ul>	
Local Consumption	Super basmati is consumed locally in a lower proportion.	
Competition	<b>Pakistan:</b> 1100 – 1130 USD per ton F.O.B (Super Basmati Milled)	<b>India:</b> 900 – 950 USD per ton F.O.B (Pusa Basmati Milled)

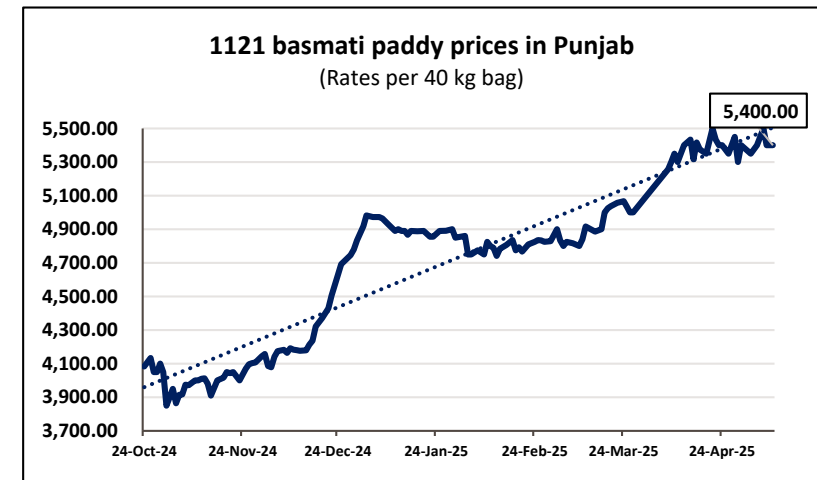


(1 US \$ = 284.10 PKR)

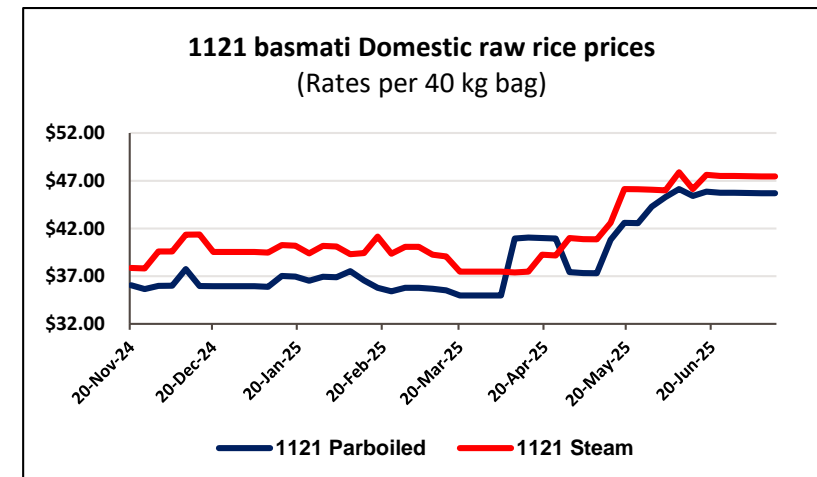
# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Basmati)

(Production, consumption, supply and Demand)

1121/Kainat Basmati		
Growing Region	Punjab: Major quantity	Sindh: Very low quantity
Production Area	<b>Punjab:</b> 14% Decline in area <b>2024-25:</b> 20,17,000 Acers <b>2023-24:</b> 23,36,000 Acers	<b>Sindh:</b> N/A
Quality of the crop year (2024-25)	<b>Punjab:</b> 1121 Basmati maintained good quality followed by previous season crop.	
Variants Available	<ul style="list-style-type: none"> <li>1121 basmati Parboiled</li> <li>1121 basmati Steam</li> <li>1121 basmati Milled</li> </ul>	
Major Markets	Europe, Gulf region and UK.	
Supply and Demand	<ul style="list-style-type: none"> <li>Despite an overall decline in rice exports, <b>1121 Basmati rice</b> continues to gain momentum, especially in <b>premium export markets</b>.</li> <li>On the domestic market front, <b>1121 Basmati prices</b> remain stable.</li> <li>As monsoon rains support crop development, the outlook for the upcoming harvest is positive; however, <b>flood risk</b> remains a serious concern, especially in low-lying areas.</li> <li>Exporters and rice mills are closely tracking both weather conditions and trade signals as they prepare for the <b>new season</b>.</li> </ul>	
Local Consumption	1121 basmati rice is consumed locally	
Competition	<b>Pakistan:</b> 1200 – 1230 USD per ton F.O.B (1121 Steam rice)	<b>India:</b> 1100 – 1150 USD per ton F.O.B (1121 Steam rice)



**NOTE:** The paddy rate updates have been temporarily discontinued and will resume with the commencement of the next season. Last updated: 10<sup>th</sup> May

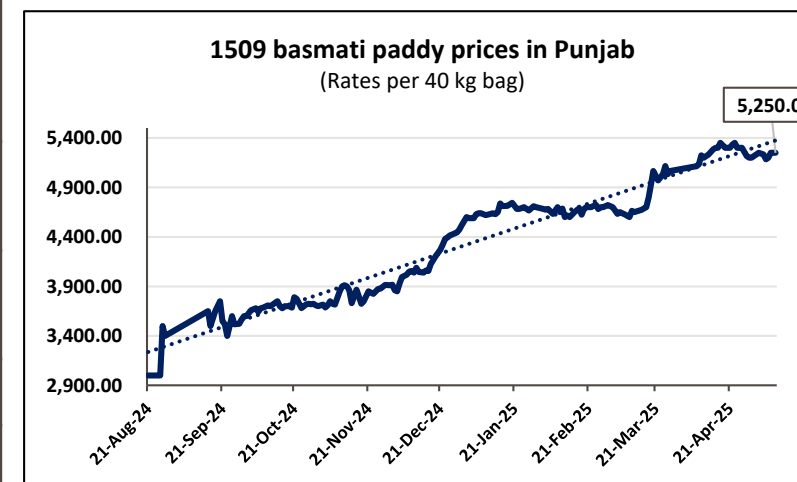


(1 US \$ = 284.10 PKR)

# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Basmati)

(Production, consumption, supply and Demand)

1509/Kisan Basmati		
Growing Region	Punjab: Major Quantity	Sindh: Not available in Sindh
Production Area	Punjab: 30% Increase in area 2024-25: 11,08,000 Acers 2023-24: 8,50,000 Acers	Sindh: N/A
Quality of the crop year (2024-25)	Punjab: 1509 Basmati maintained good quality followed by previous season crop.	
Variants Available	<ul style="list-style-type: none"> <li>1509 basmati Parboiled</li> <li>1509 basmati Steam</li> <li>1509 basmati Milled</li> </ul>	
Major Markets	Gulf region, UK and USA.	
Supply and Demand	<ul style="list-style-type: none"> <li>Preparations for the new rice crop are in progress, with <b>1509 Basmati</b> expected to reach the market ahead of <b>1121</b> and <b>Super Basmati</b>. A strong <b>harvest</b> is anticipated this season. While 1509 is largely consumed domestically, a portion is also exported alongside <b>1121 Basmati</b>.</li> </ul>	
Local Consumption	1509 basmati rice is consumed locally and also exported in some proportion.	



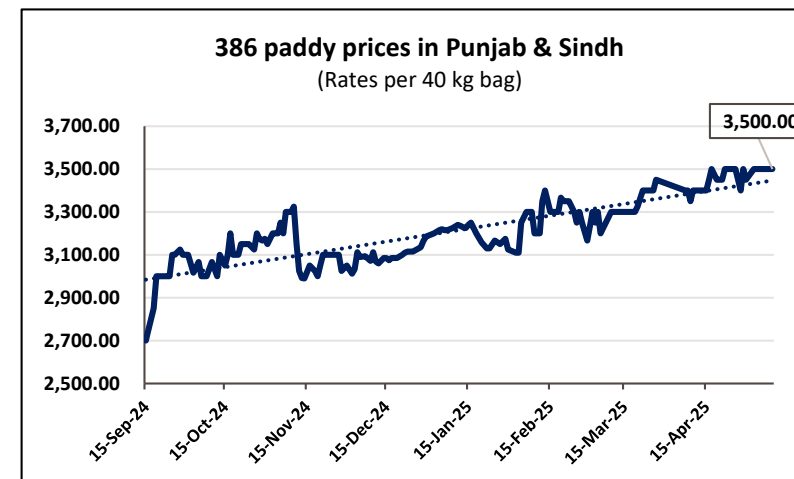
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# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Non-Basmati)

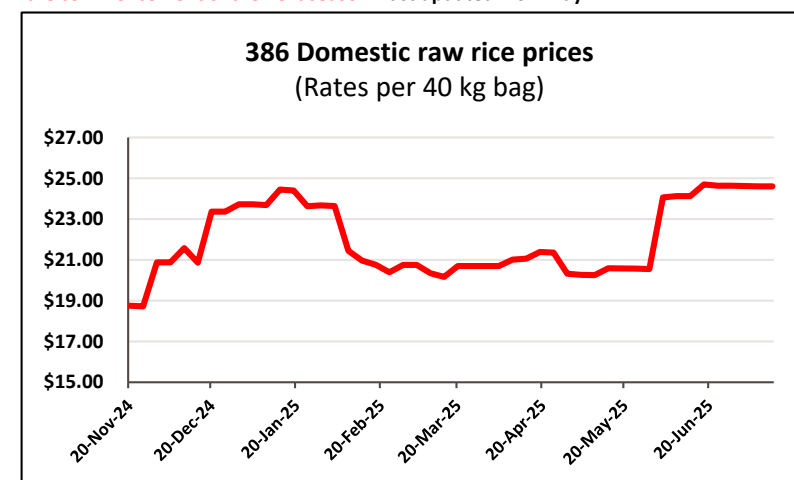
(Production, consumption, supply and Demand)



386		
Growing Region	Punjab: Major Quantity	Sindh: Not available in Sindh
Production Area	<b>Punjab:</b> 24% Increase in area <b>2024-25:</b> 4,43,000 Acers <b>2023-24:</b> 3,56,000 Acers	<b>Sindh:</b> N/A
Quality of the crop year (2024-25)	<b>Punjab:</b> 386 maintained good quality followed by previous season crop.	
Variants Available	<ul style="list-style-type: none"> <li>• 386 brown rice</li> <li>• 386 milled rice</li> <li>• 386 parboiled rice</li> </ul>	
Major Markets	African and Gulf countries.	
Supply and Demand	<ul style="list-style-type: none"> <li>• As per the news, a <b>17.42% drop</b> in <b>non-basmati rice export</b> value is recorded to <b>\$2.522 billion in FY2024-25</b>, shipment volumes remained significant at <b>5.009 million tonnes</b>, reflecting resilience in key markets.</li> <li>• Domestic prices for <b>386</b> rice have remained stable.</li> <li>• The preparations for the new crop harvest progress in line with seasonal timelines. However, flood risks during monsoon season remain a key concern, particularly in low-lying rice-growing areas.</li> </ul>	
Local Consumption	386 rice is consumed locally.	



**NOTE:** The paddy rate updates have been temporarily discontinued and will resume with the commencement of the next season. Last updated: 10<sup>th</sup> May



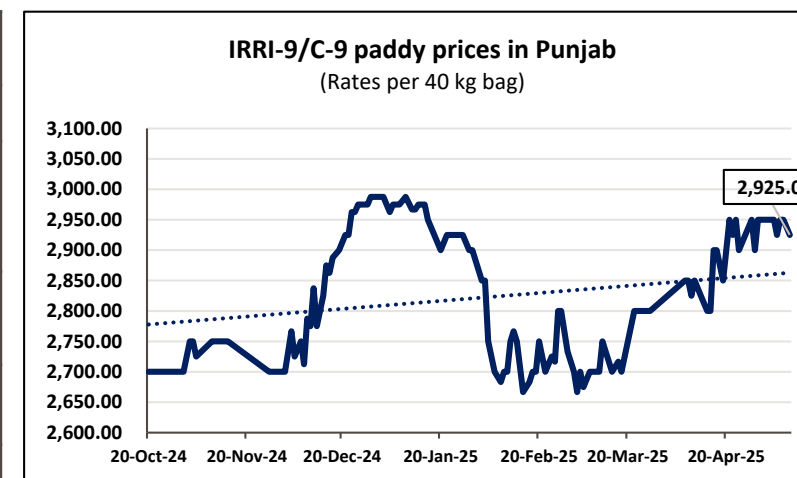
(1 US \$ = 284.10 PKR)

# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Non-Basmati)

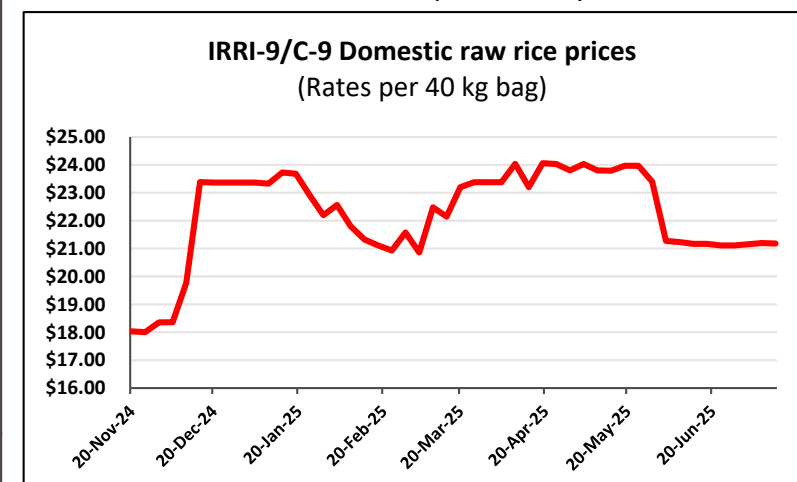
(Production, consumption, supply and Demand)



IRRI- 9		
Growing Region	Punjab: Lower Quantity.	Sindh: Major Quantity.
Production Area	Punjab: 54% Increase in area 2024-25: 1,23,000 Acers 2023-24: 80,000 Acers	Sindh: N/A
Quality of the crop year (2024-25)	Sindh: The IRRI-9 crop was badly affected due to low water in sindh and high temperature, resulting in cracks, high broken % and cooking issues.	
Variants Available	<ul style="list-style-type: none"> <li>IRRI-9 milled rice is commonly traded.</li> </ul>	
Major Markets	Gulf & African countries.	
Supply and Demand	<ul style="list-style-type: none"> <li>Pakistan's non-basmati rice exports declined by <b>17.42%</b> in <b>FY2024-25</b>. <b>IRRI-9</b> stocks are running low, following steady local trade and earlier bulk movement.</li> <li>Despite softer export demand, domestic prices for <b>IRRI-9</b> have remained stable, supported by consistent market activity.</li> <li>Monsoon rains are aiding crop progress, though flood threats in vulnerable growing areas remain a concern as the new season approaches.</li> </ul>	
Local Consumption	IRRI-9 rice is consumed locally.	



**NOTE:** The paddy rate updates have been temporarily discontinued and will resume with the commencement of the next season. Last updated: 10<sup>th</sup> May



(1 US \$ = 284.10 PKR)

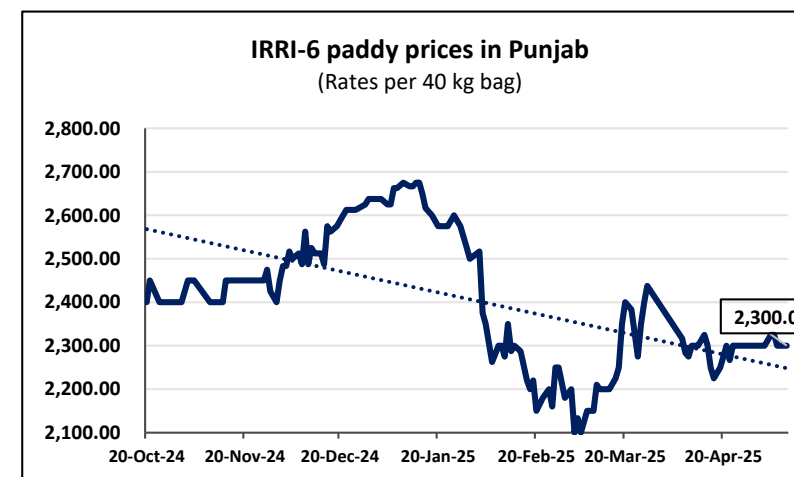


# MAJOR RICE VARIETIES GROWN IN PAKISTAN: (Non-Basmati)

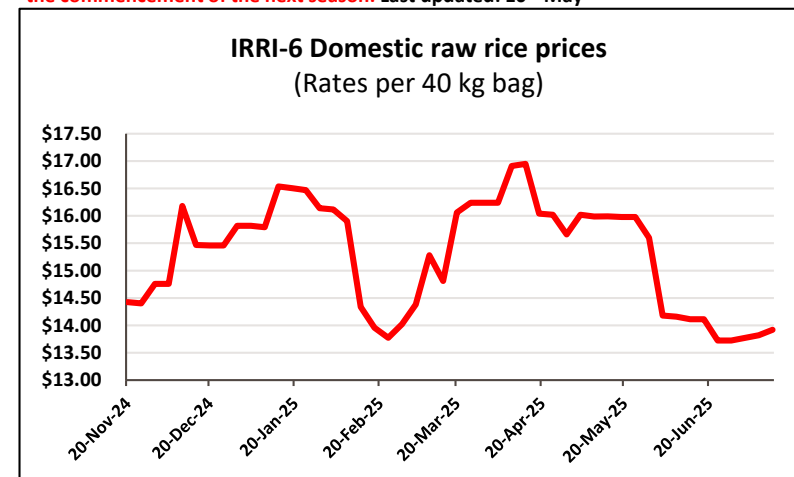
(Production, consumption, supply and Demand)



IRRI- 6		
Growing Region	<b>Punjab:</b> Relatively good Quantity.	<b>Sindh:</b> Major Quantity.
Production Area	<b>Punjab:</b> 32% Increase in area 2024-25: 2,07,000 Acers 2023-24: 1,57,000 Acers	<b>Sindh:</b> N/A
Quality of the crop year (2024-25)	<b>Sindh:</b> The IRRI-6 crop was badly affected due to low water in sindh and high temperature, resulting in cracks, high broken % and cooking issues.	
Variants Available	<ul style="list-style-type: none"> <li>IRRI-6 milled rice.</li> <li>IRRI-6 steam rice.</li> <li>IRRI-6 parboiled rice</li> <li>IRRI-6 brown rice</li> </ul>	
Major Markets	Indonesia, Malaysia, Philippines and African countries.	
Supply and Demand	<ul style="list-style-type: none"> <li>Pakistan's <b>non-basmati rice exports</b> fell by <b>17.42%</b> in value to \$2.522 billion in <b>FY2024–25</b>, with volumes reaching <b>5.009 million tonnes</b>. Among these, <b>IRRI-6 stocks</b> have been mostly depleted, reflecting strong early-season trade.</li> <li><b>China's</b> growing interest in <b>IRRI-6</b> is driven by its higher milling yield of <b>68–70%</b>, making it more cost-effective than local Chinese varieties and appealing for both retail and ready-to-eat food segments.</li> <li>Domestic prices for <b>IRRI-6</b> remain stable.</li> <li>While monsoon rains are aiding new crop development, experts warn that flooding could pose a risk in southern growing regions.</li> </ul>	
Local Consumption	IRRI-6 rice is consumed locally.	



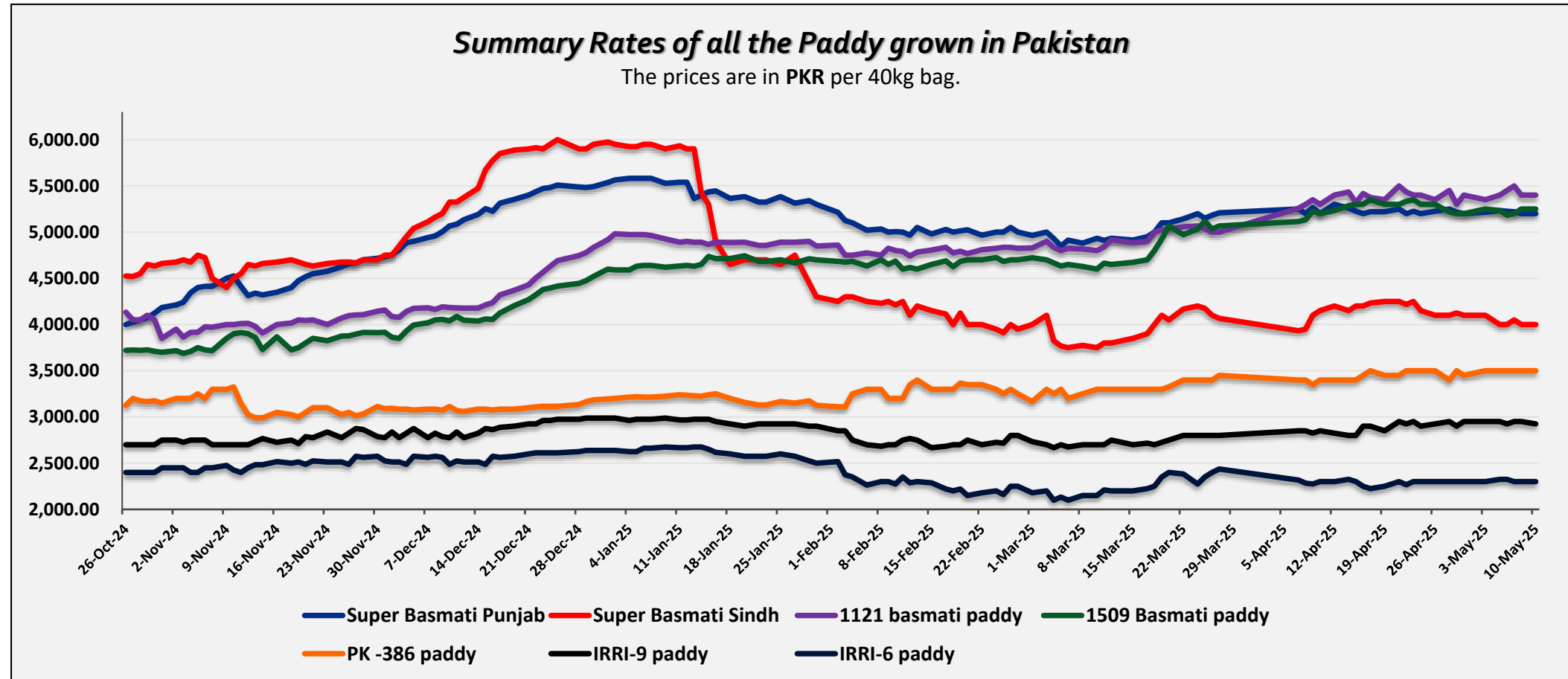
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(1 US \$ = 284.10 PKR)



# SUMMARY RATES OF ALL THE PADDY GROWN IN PAKISTAN



Here we present a comparative performance on all the varieties grown in Pakistan till the time being reported. (Last Updated: 10<sup>th</sup> May)

For checking previous year rates and comparing various varieties please click here: [Pakistan Domestic Market](https://www.RiceNewsToday.com)

# EMERGING BASMATI VARIETIES FOR NEW SEASON

## CROP: 2025–26

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With the onset of the **2025–26 kharif season**, discussions have intensified around the adoption of new and emerging basmati rice varieties. A notable trend this season is the increasing interest in **variety 1718**, which is reportedly being considered as a potential replacement for the widely cultivated **1121 basmati**.

### **Key Emerging Basmati Varieties Observed This Season:**

1. 1718 (reportedly replacing 1121 in some areas)
2. 1692
3. 1847
4. 1885
5. PB-07
6. Guard 101

- ☐ These varieties are gaining attraction among growers due to certain agronomic benefits such as Improved yield potential & Better grain quality for export markets.
- ☐ As sowing continues and harvesting begins by the end of this month, clearer insights will emerge regarding the scale of cultivation and performance of these varieties across key basmati-growing zones.

***Using certified varieties not only ensures better productivity but also strengthens Pakistan’s position in the global basmati rice market by maintaining consistency, quality, and authenticity.***

# APPROVED BASMATI & NON- BASMATI VARIETIES FROM GOVERNMENT 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 1121 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 NEWS HIGHLIGHTS:

- **Pakistan's rice exports to China** surged by **84%** in the **first half of 2025**, reaching approximately **\$35.93 million**, up from **\$19.53 million** in the same period last year. Shipments of semi/wholly milled rice totaled **\$29.53 million**, while broken rice, including Irri-6, contributed over **\$6.39 million**. The growth reflects **China's** strategy to diversify food imports and **Pakistan's** strengthening position as a key supplier. Trade officials attribute the rise to improved policies, quality standards, and strong diplomatic ties. This upward trend signals deeper economic integration and a positive outlook for **Pakistan's rice** industry. [Read More](#) (22<sup>nd</sup> July).
- **Pakistan's raw food exports** declined by nearly **4%** in **FY25** to **\$7.116 billion**, ending a 20-month growth streak. **Rice exports** saw the steepest drop, falling **14.72%** to **\$3.353 billion**. **Basmati rice** volumes rose by **4.48%**, but value dropped **5.3%** to **\$830.57 million**; **non-basmati rice exports** fell **17.42% in value**. Other declines included vegetables (-**14.53%**) and fruits (-**10.29%**), while fish exports grew **13.44%**. [Read More](#) (21<sup>st</sup> July).
- **Pakistan's food exports** dropped by **32%** in **June 2025**, with rice and vegetables hit the hardest, according to **PBS data**. **Rice exports** declined by **14.7%**, with **Basmati rice** falling **5.3% to \$830 million** and **non-basmati** down **17.4% to \$2.5 billion**. Overall food exports for June totaled **\$367.7 million**, sharply down from **\$584.5 million in May**. [Read More](#) (19<sup>th</sup> July).



**PAKISTAN is the 4<sup>th</sup> largest rice exporting country in the world.**

- **Pakistan's rice exports** (FY 2024-25) stood at 5.817 million tonnes.
- **Non-basmati** rice exports in (FY 2024-25) were 5.009 Million tons.
- **Basmati** rice exports in (FY 2024-25) were 808,643 tons.
- Pakistan controls **67%** of the **basmati brown rice market** in the **European Union** and the **UK**.

The top destinations of Pakistan rice exports:

**Basmati rice export markets:**

- GULF region
- Europe, UK and USA

**Long grain rice export markets:**

- Asia (Malaysia, Indonesia, Philippines and also neighboring country Afghanistan)
- Middle East (Saudi Arabia, UAE & Oman)

Source: Publications

# RICE FARMING IN PAKISTAN:

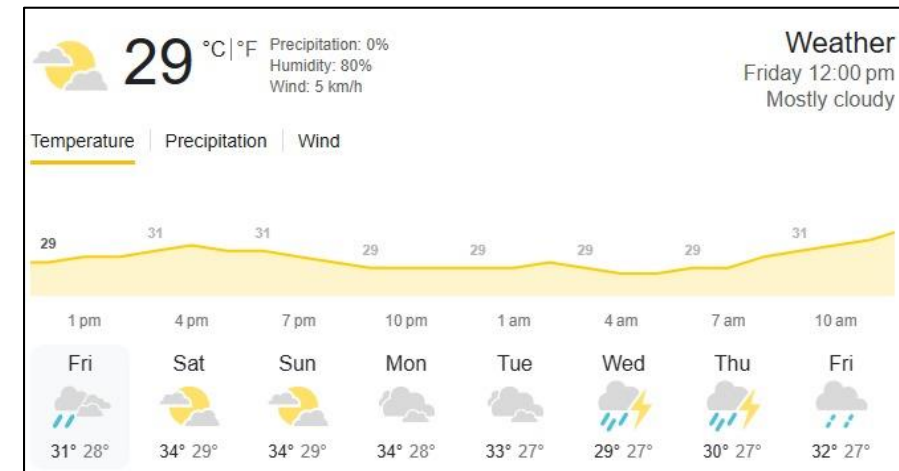
## Experts Urge Timely Rice Transplanting by July 25 to Maximize Yield:

- FAISALABAD – Agriculture experts have highlighted the second half of July as critical for **maximizing paddy yield**, urging **farmers** to complete rice transplanting by July 25. Recommended varieties include coarse types like **NIBGE GSR-6 to GSR-8** and fine **basmati types** such as **Super Basmati, PK-1121**, and **Punjab Basmati**.
- Farmers are advised to maintain standing water for **10–15 days** before transplanting and ensure proper land leveling and plant spacing (**two seedlings in 80,000 holes per acre**). Zinc sulfate should be applied within 10 days after transplanting if not used earlier, with dosage varying by concentration. [Read More](#)
- Meanwhile, the ongoing monsoon rains across Pakistan are proving beneficial for **rice cultivation** by ensuring ample **water supply**. However, experts have warned that the **risk of flooding** could pose a serious threat to **paddy crops**, especially in low-lying and river-adjacent areas. Growers are advised to stay alert, monitor weather forecasts, and take precautionary measures to protect their fields from potential **flood damage**.

Source: Publications & News



Source: AI



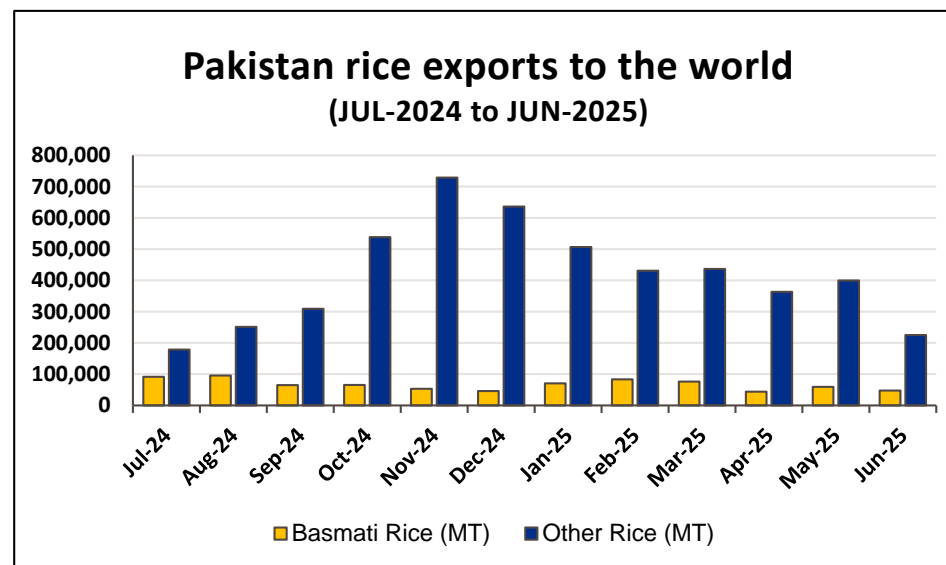
Source: Google Weather  
Weather forecast from 25<sup>th</sup> July and onward.

# PAKISTAN RICE EXPORTS (Month-wise) & PRODUCTION OVERVIEW (2024-25):



Months	Basmati Rice (MT)	Value in (000) \$	Other Rice (MT)	Value in (000) \$	Total QTY (MT)	Total Value in (000) \$
Jul-24	91,303	\$92,532	178,617	\$113,214	269,920	\$205,746
Aug-24	95,646	\$100,079	251,413	\$158,843	347,059	\$258,922
Sep-24	65,063	\$70,551	309,265	\$186,646	374,328	\$257,197
Oct-24	65,544	\$68,657	538,600	\$293,672	604,144	\$362,329
Nov-24	52,918	\$54,299	728,964	\$377,072	781,882	\$431,371
Dec-24	46,160	\$47,699	636,055	\$312,085	682,215	\$359,784
Jan-25	70,696	\$77,782	506,845	\$241,270	577,541	\$319,052
Feb-25	83,254	\$88,368	430,828	\$200,595	514,082	\$288,963
Mar-25	75,994	\$77,002	436,683	\$197,333	512,677	\$274,335
Apr-25	43,895	\$45,741	363,434	\$160,555	407,329	\$206,296
May-25	59,077	\$59,226	399,785	\$180,025	458,862	\$239,251
Jun-25	47,516	\$167,903	225,236	\$795,886	272,752	\$963,789
<b>Total</b>	<b>797,066</b>	<b>949,839</b>	<b>5,005,725</b>	<b>3,217,196</b>	<b>5,802,791</b>	<b>\$4,167,035</b>

Source: Pakistan Bureau of statistics



**Pakistan Rice Production Area (2024-25)**  
 Basmati rice production area: 48,40,000 Acers  
 Other rice production area: 18,37,000 Acers

**Pakistan Rice Production Volume (2024-25)**  
 Milled rice production in (1000 Tons): 10,000  
 Rough rice production in (1000 Tons): 15,002

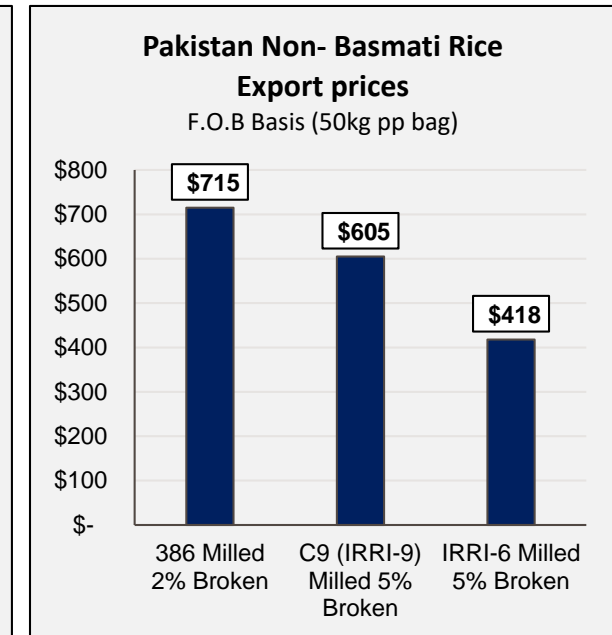
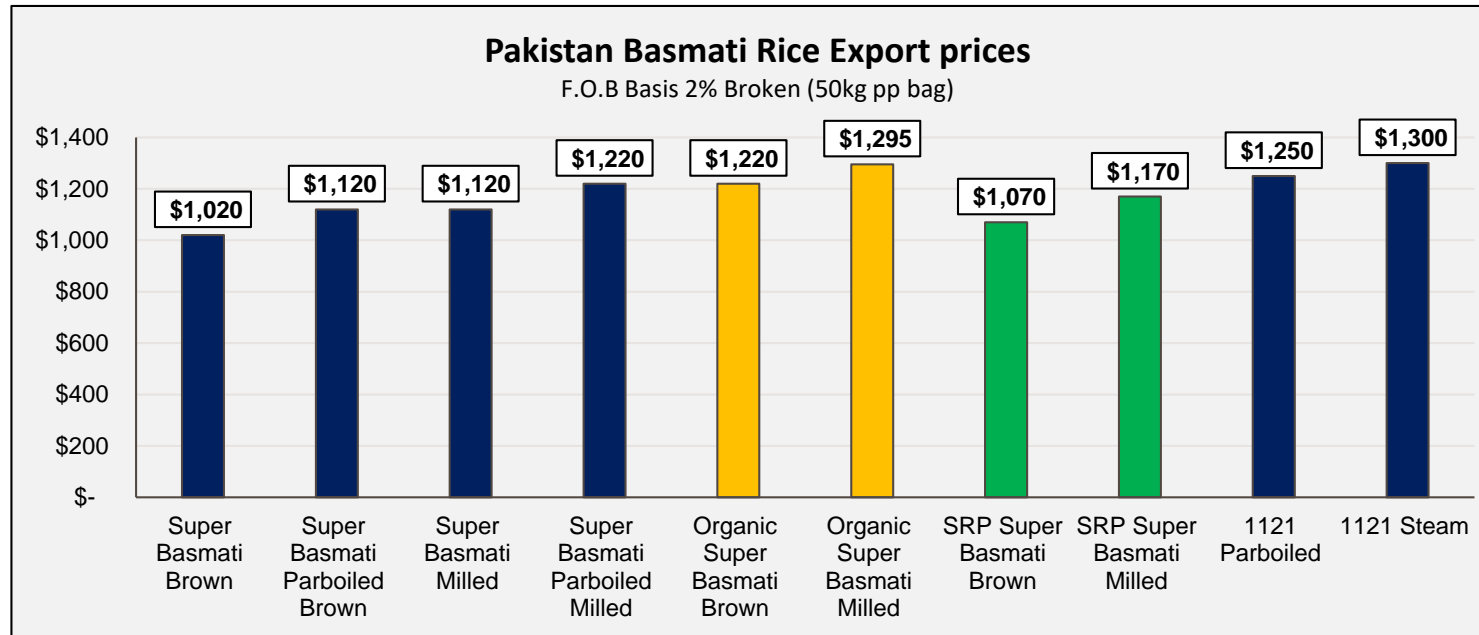
**Pakistan Rice Ending stocks (2024-25)**  
 Ending stocks (Nov-2024)= 17,54,000 MT (USDA official)

Source: Punjab crop department & USDA



# PAKISTAN RICE PRICES:

EXPORT PRICES F.O.B BASIS (PER TON).



**All Prices were updated on 23<sup>rd</sup> July 2025.**

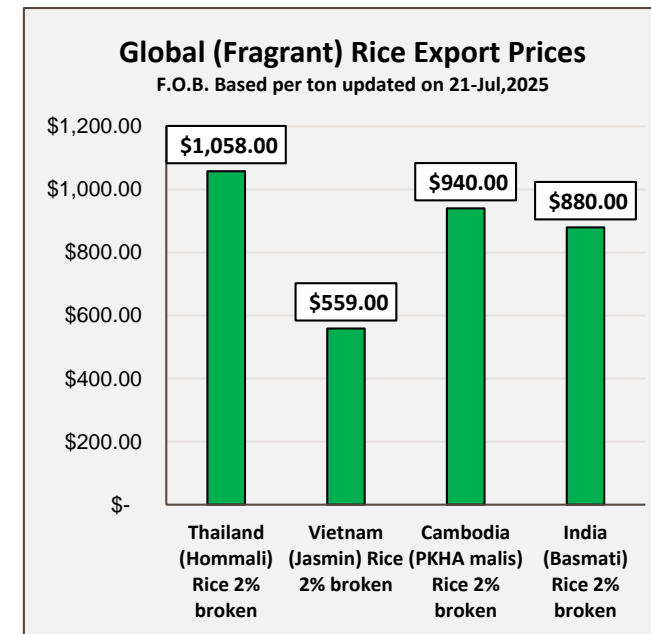
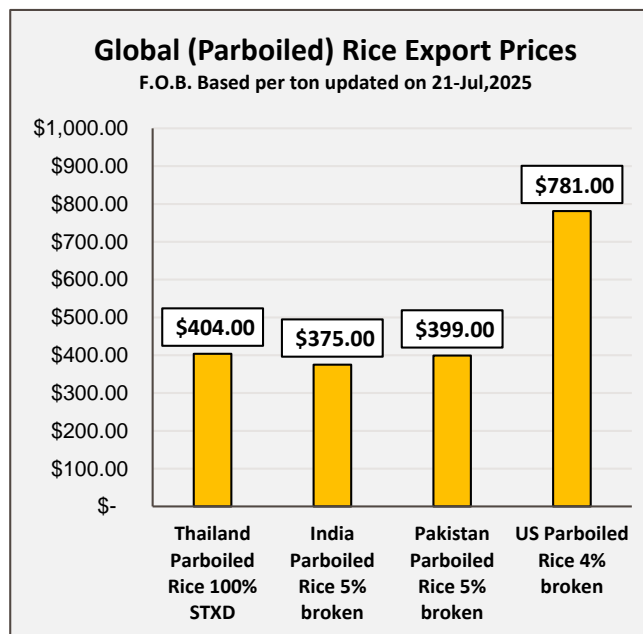
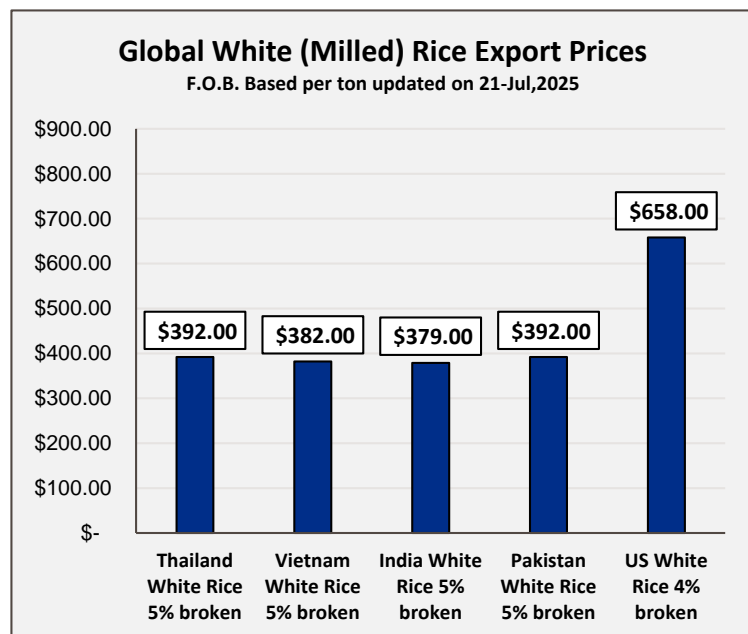
- This week, prices for Super Basmati, 1121 Basmati and non-basmati varieties such as 386, IRRI-9, and IRRI-6 remained largely stable compared to last week, with only minor fluctuations of \$5–\$10 per ton.

**For more details on Pakistan market rice prices Please click here:** [Pakistan Rice Market](https://www.RiceNewsToday.com)



# GLOBAL RICE PRICES:

EXPORT PRICES F.O.B BASIS (PER TON)



**All Prices were updated on 21<sup>st</sup> July 2025.**

- We learned from the market that, **Indian rice export prices** fell for the **third consecutive week**, with **5% broken parboiled rice dropping to \$375–\$380** per ton, the lowest **since mid-2023**, due to weak demand, oversupply, and a depreciating rupee. In contrast, Bangladesh's domestic rice prices remain high despite a **record harvest**, driven by high input costs and supply chain inefficiencies. **Vietnam's 5% broken rice stood at \$381 per ton**, with slight price gains from traders securing future contracts. Thai prices held steady at **\$390–\$395 per ton** amid low demand, despite expectations of a strong upcoming harvest.

For more details on global rice prices Please click here: [Global Rice Market](https://www.ricenewstoday.com)

# Global Rice Market Divergence: India's Price Plunge vs. Bangladesh's Inflationary Surge


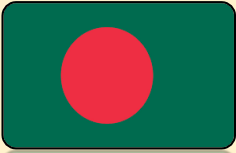





- India's rice production reached a record **151 MMT in 2024/25**, with strong monsoons and subsidies boosting output. This, along with a weak rupee, has pushed **global rice prices** to two-year lows.
- The lifting of **India's export ban** led to a surge in shipments, projected at **24 MMT in 2025/26**. **Indian basmati** is now **25% cheaper than Thai jasmine**, giving Indian exporters a global edge.
- Despite a strong Boro crop, Bangladesh is facing **8% year-on-year rice price inflation**, driven by rising costs in production, milling, and logistics.
- Bangladesh's rice imports jumped **2,900% to \$492 million due to flood-related crop losses** and cyclone damage, but these imports haven't eased local price pressures.
- Investors are focusing on **Indian rice exporters**, currency-hedged funds like WMIN, and Bangladeshi firms involved in Agri-infrastructure and climate-resilient farming.
- Risks include possible monsoon disruption in India and political or climate-related instability in **Bangladesh**, which could affect reform and supply chains.



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# GLOBAL NEWS HIGHLIGHTS OF THIS WEEK:

	<p>As part of the newly signed <b>India–UK Free Trade Agreement</b>, the <b>UK</b> will significantly <b>lower import duties</b> on <b>Indian basmati rice</b> and other <b>processed food products</b>. This reduction in tariffs is expected to enhance the competitiveness of <b>Indian rice</b> in the <b>British market</b>, opening new opportunities and potentially increasing the volume of <b>premium rice shipments</b> to the <b>UK</b>. <a href="#">READ MORE</a> (25-Jul)</p>
	<p>The <b>Bangladeshi government</b> has approved <b>18 improved rice varieties</b>, most suitable for <b>Boro and Aman seasons</b>, aiming to boost productivity and climate resilience. Among them are <b>flood-tolerant</b> and <b>region-specific types</b> like <b>BRRI dhan 109, 111, and 106</b>. Additionally, ACI introduced ACI <b>dhan2</b>, the country's first aromatic rice variety for the <b>Boro season</b>, with high yield and <b>export</b> potential. <a href="#">READ MORE</a> (24-Jul)</p>
	<p><b>Vietnam</b> remains Singapore's <b>third-largest rice supplier in 2025</b>, with strong performance in <b>white, milled fragrant, and glutinous rice</b> categories. In the first half of the year, <b>white rice exports</b> rose <b>11.9% to \$30.2 million</b>, while <b>Vietnam</b> held the top <b>market share</b> for <b>fragrant (57%)</b> and <b>glutinous rice (61%)</b>. A proposed bilateral rice trade agreement may further stabilize <b>future exports</b>. <a href="#">READ MORE</a> (25-Jul)</p>
	<p><b>Japan is facing a severe rice shortage</b> due to <b>poor harvests</b>, rising tourism demand, and declining production, leading to record-high <b>prices and increased imports</b>. In contrast, <b>South Korea</b> is struggling with a <b>rice glut, driving prices down</b> and prompting government stockpiling, farmer protests, and incentives to switch to <b>alternative crops</b>. <a href="#">READ MORE</a> (22-Jul)</p>
	<p><b>Niger State</b> has signed a <b>\$1.2 billion deal with AfricaRice</b> to boost annual <b>rice production</b> from <b>1.5 to 10 million metric tons by 2030</b>. The project includes developing high-quality seed farms, modern commercial rice farms, and smallholder operations across <b>500,000 hectares</b>, aiming to create over <b>100,000 jobs</b> and enhance <b>food security</b>. <a href="#">READ MORE</a> (25-Jul)</p>

# UPCOMING EVENTS:

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## 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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