

RICE MARKET REPORT

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

Monthly report ***"August 2025 Edition"***

Dated: 25th August 2025

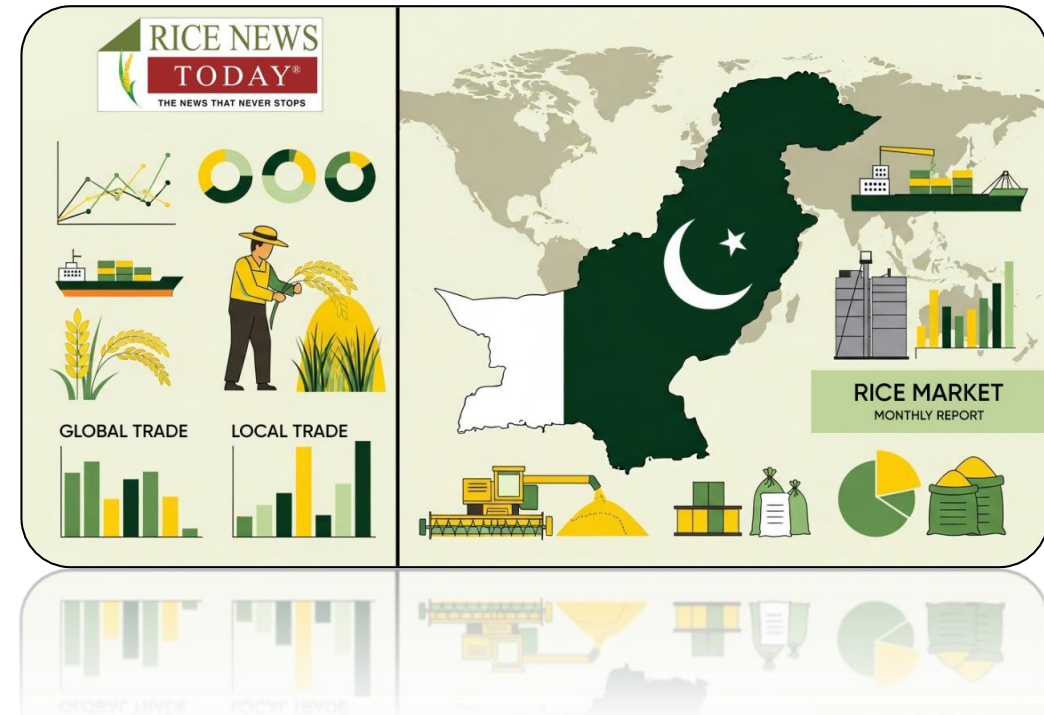


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Mapping Traditional and Emerging Import Markets for Pakistani Basmati Rice

TRADITIONAL BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Europe & UK	UK, Italy, Belgium, Netherlands, Germany	~67% share in brown Basmati segment; zero-duty access under GSP+; strong price premium market.
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-focused market; growing demand for organic & low-residue rice

EMERGING BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Southeast Asia	Malaysia	Increased interest after India's export disruption; retail & industrial buyers active
	Indonesia	Rising demand for parboiled & aromatic Basmati; steady growth
	Philippines	New entry point with public-sector G2G 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	~4%	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	~2%	Small but steady importer of low-pesticide brown rice

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

- These countries collectively account for **most** 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 (**Sept–Aug**) confirms **150,065 MT** of brown rice exports to **13 countries**, with these **10** leading the volume share.

Top 10 Basmati Rice Markets for Pakistan & India

RANK	KEY MARKET	PAKISTAN'S PERSPECTIVE 	INDIA'S PERSPECTIVE 
1	United Arab Emirates (UAE)	A leading buyer of Pakistani basmati and also a major re-export hub , redistributing rice to other Gulf and African markets.	Strong destination for India as well, but more important as a re-export gateway than a final consumer.
2	Saudi Arabia	One of Pakistan's biggest Traditional market an important destination for Pakistan, though volumes fluctuate.	India's single largest market , buying the highest share of its basmati exports.
3	United Kingdom	One of Pakistan's biggest premium markets in Europe, where Pakistani basmati enjoys strong brand loyalty.	Also significant for India, with steady demand from South Asian diaspora.
4	Italy & Spain (EU)	Among the largest EU importers of Pakistani basmati, both countries maintain long-standing trade links.	India also exports to these markets, but Pakistan has a stronger share.
5	Netherlands, Belgium, France, Germany (EU cluster)	Collectively a core region for Pakistani exports , with consistent demand across Western Europe.	India is present but holds a smaller share compared to Pakistan.
6	Iran	Imports from Pakistan are inconsistent due to trade restrictions.	One of India's biggest and most reliable buyers.
7	Iraq	Limited direct trade for Pakistan.	A key growth market for India in recent years.
8	Yemen & Oman	Significant for Pakistan, especially Oman, where Pakistani rice has deep market penetration.	Moderate for India, with demand driven mostly by price competitiveness.
9	Kuwait & Qatar	Both countries regularly import Pakistani basmati, ranking within the top 10 destinations.	Also purchase Indian basmati, though in slightly higher volumes.
10	United States	Smaller but growing market for Pakistan, supported by diaspora demand.	A major premium market for India, steadily expanding.

Sources: REAP, APEDA, CBI, WITS (UN Comtrade), ITC Trade Map, FAO Rice Market Monitor

Comparative Analysis of EU Basmati Rice Imports from India and Pakistan

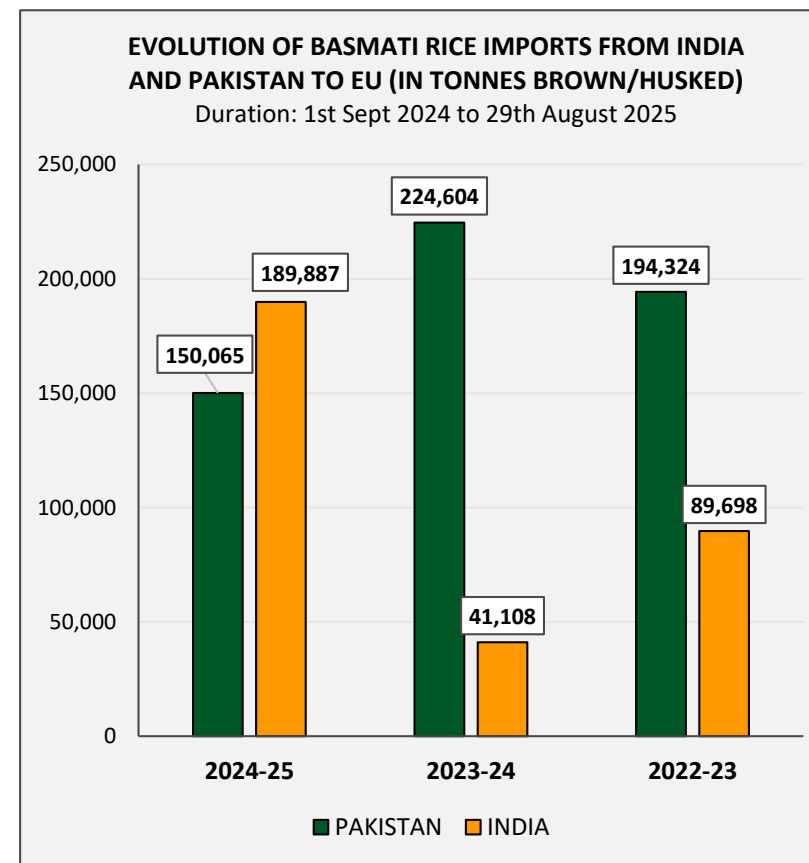


EVOLUTION OF BASMATI RICE IMPORTS FROM INDIA AND PAKISTAN TO EU (IN TONNES BROWN/HUSKED)

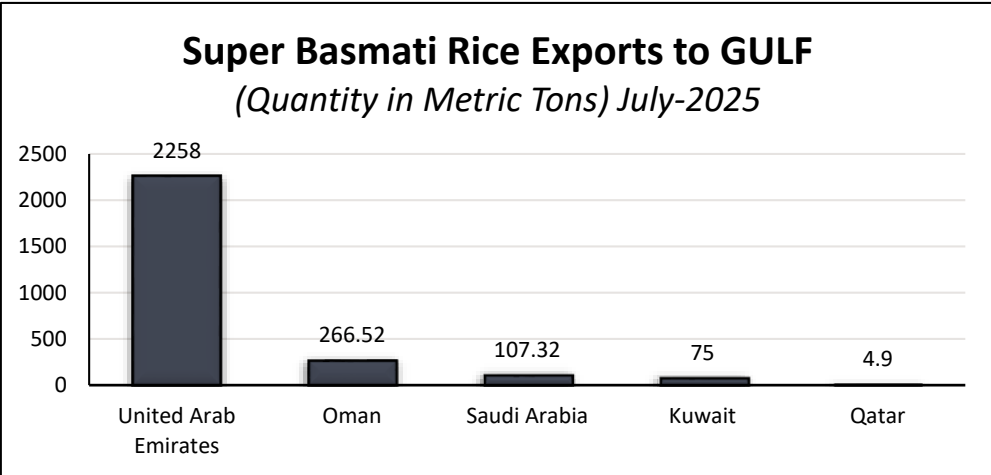
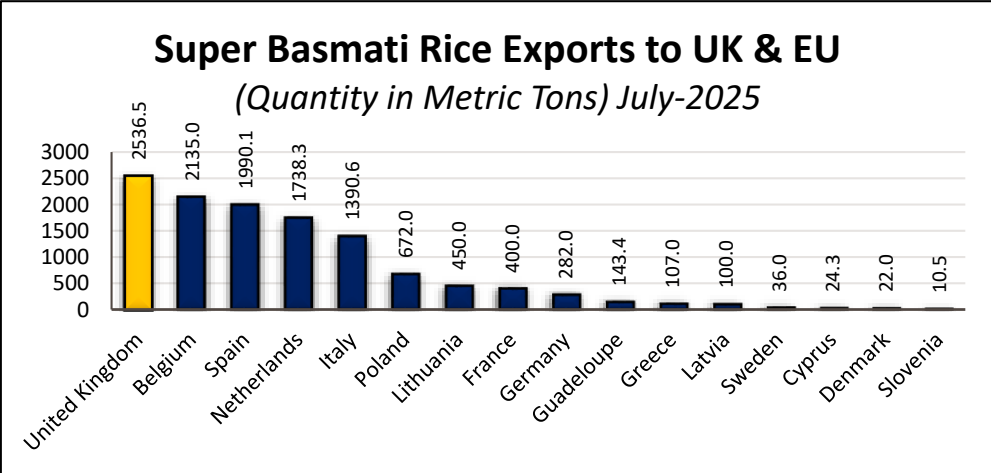
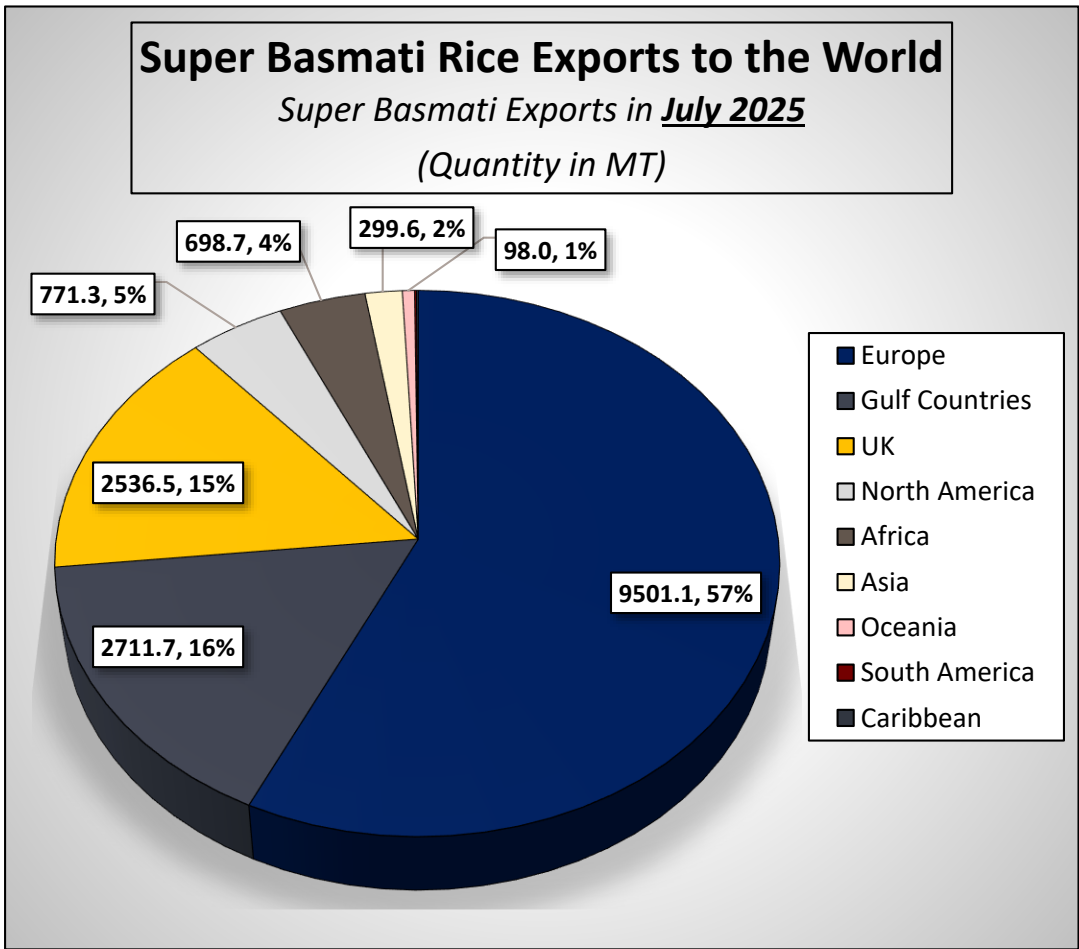
Duration: 1st Sept 2024 to 29th August 2025

MS	Pakistan (2024-25)	India (2024-25)	Total (2024-25)	Pakistan (2023-24)	India (2023-24)	Total (2023-24)	Pakistan (2022-23)	India (2022-23)	Total (2022-23)
Belgium	18,081	44,070	62,151	31,145	2,098	33,244	40,450	5,500	45,950
Czechia	25	—	25	—	—	—	25	—	25
Denmark	3,624	210	3,834	3,612	7	3,619	2,203	—	2,203
France	18,932	11,443	30,375	21,731	2,559	24,290	23,847	8,384	32,231
Germany	1,524	4,802	6,326	2,827	1,879	4,706	1,970	2,892	4,862
Greece	—	325	325	—	—	—	—	—	—
Italy	44,953	33,927	78,880	50,124	8,270	58,394	46,561	16,621	63,181
Netherlands	26,099	44,400	70,499	54,898	18,589	73,486	17,573	42,932	60,505
Poland	7,304	6,609	13,913	12,250	1,260	13,510	8,450	1,875	10,325
Portugal	6,113	20,306	26,419	13,544	4,696	18,240	8,943	6,622	15,565
Romania	3,375	—	3,375	2,000	—	2,000	100	—	100
Spain	23,409	20,421	43,830	32,459	1,675	34,134	44,202	4,767	48,969
Sweden	—	—	—	—	75	75	—	105	105
Grand Total	150,065	189,887	339,952	224,604	41,108	265,713	194,324	89,698	284,022

Source: European Commission

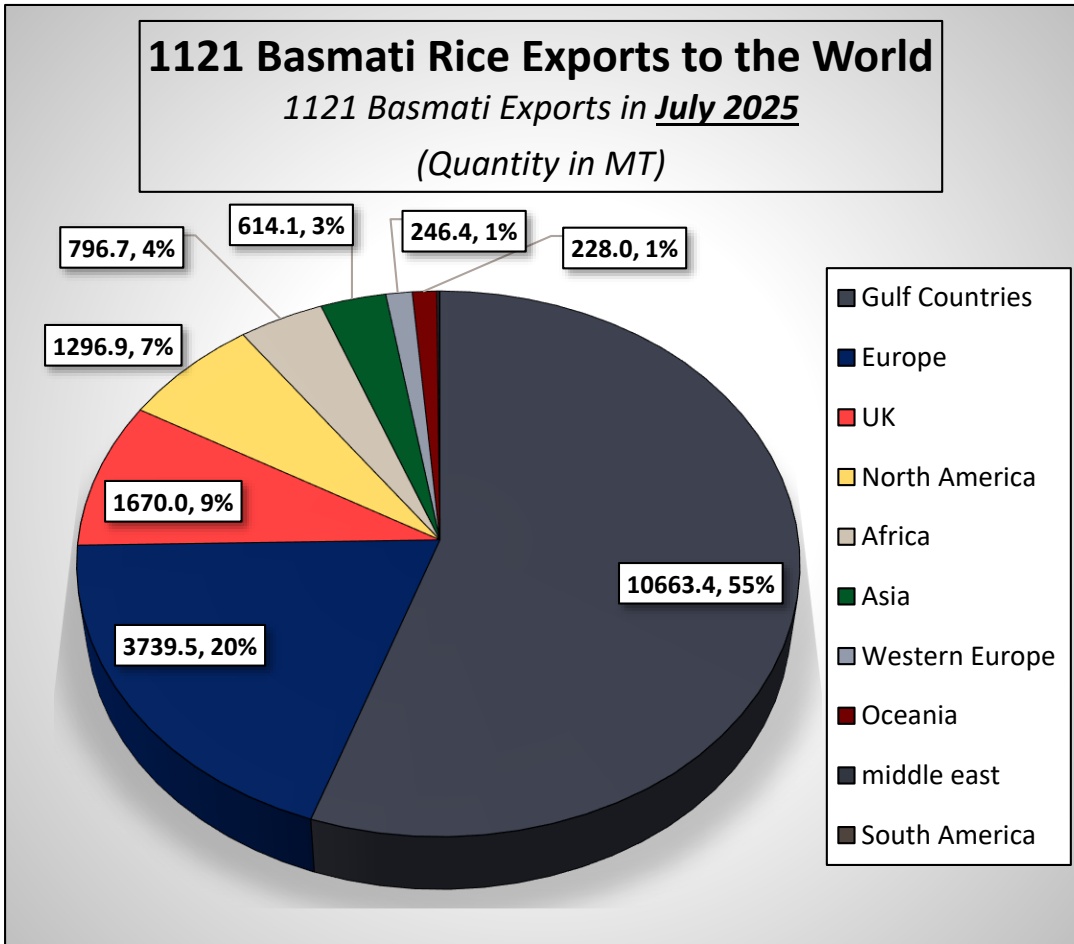


SUPER BASMATI EXPORTS TO THE WORLD & MAJOR DESTINATIONS

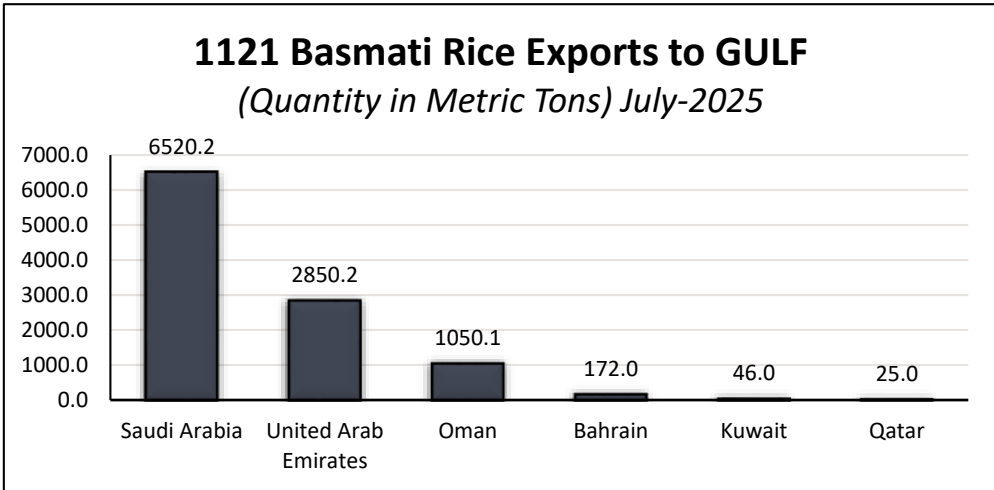
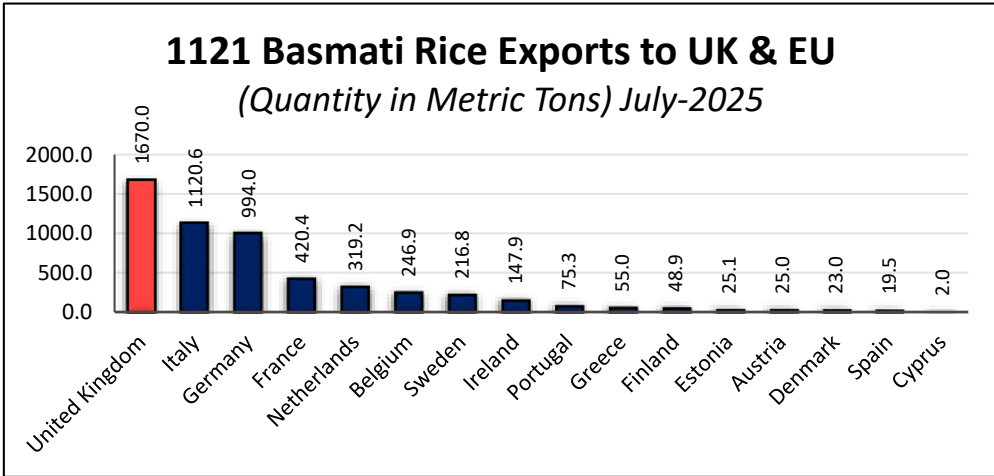


"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

1121 BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

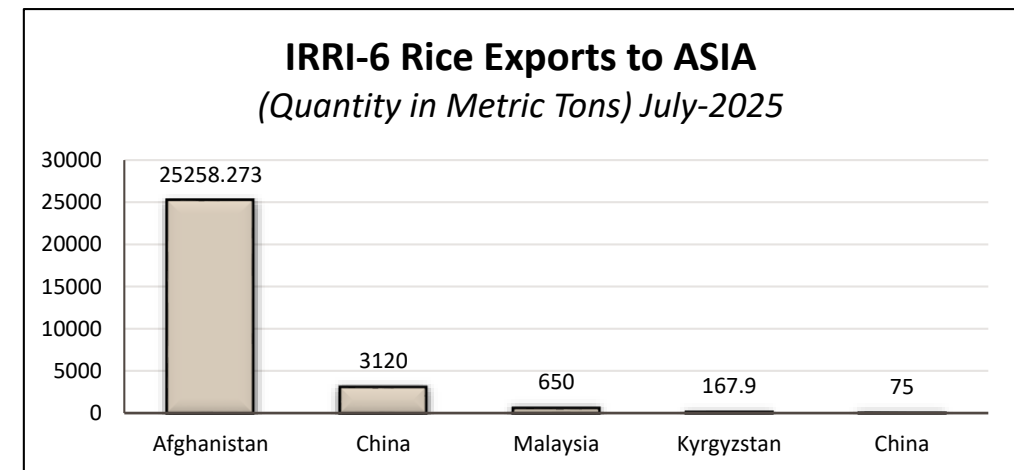
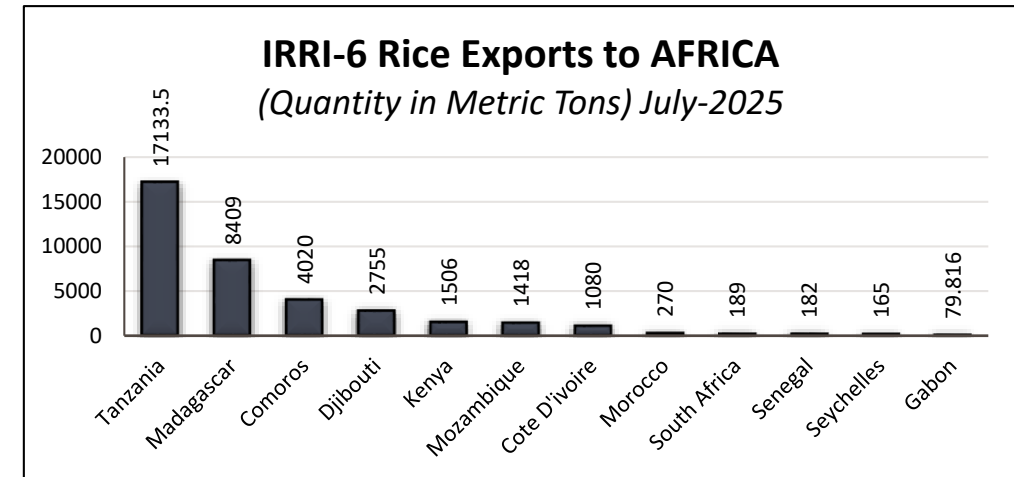
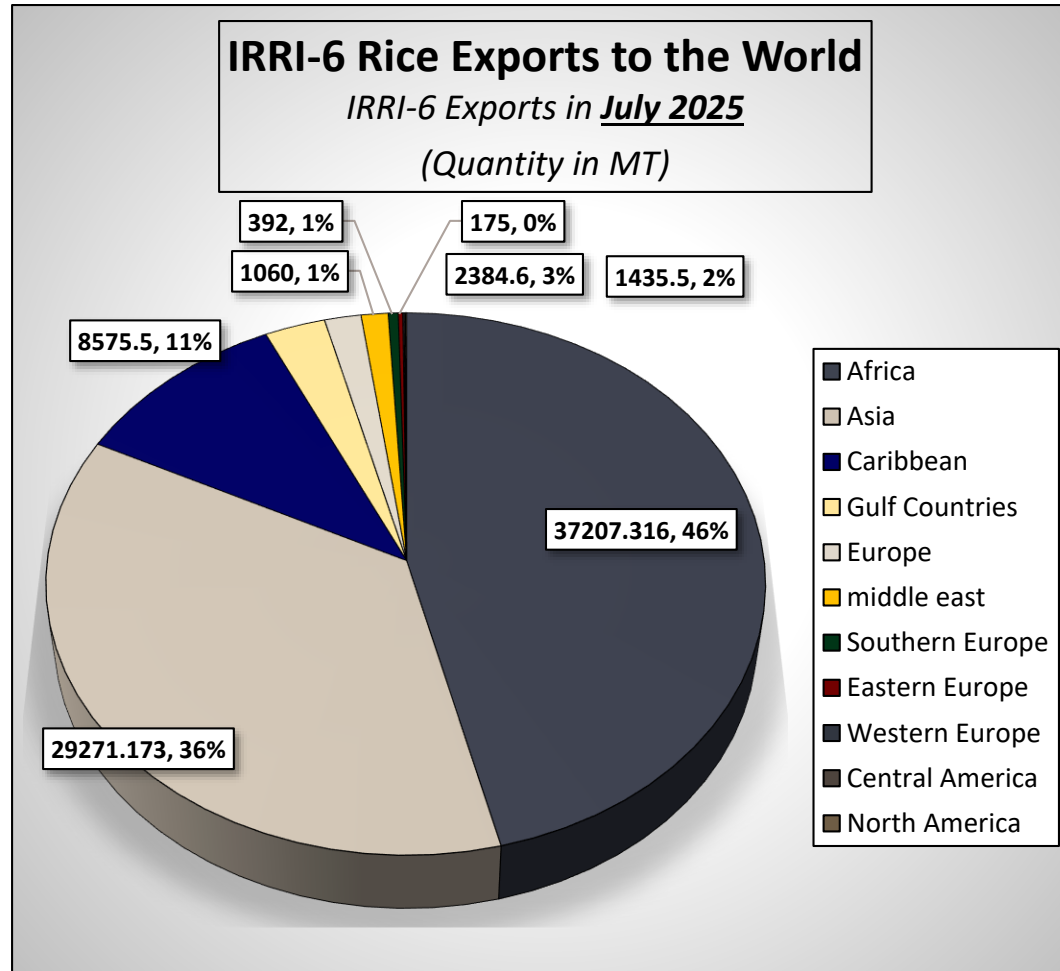


Mapping Traditional and Emerging Import Markets for Pakistani Non-Basmati Rice

TRADITIONAL NON- BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Africa	Kenya	Largest buyer; ~252,000 MT in 2024. Customs value cut \$615 → \$460/MT ; duty-free quota of 500,000 MT till Dec 2025 ensures strong FY2025 demand.
	Mozambique, Madagascar, Tanzania, Djibouti, Cote d Ivoire	Long-time importers; steady demand for parboiled and broken rice, driven by government procurement.
GULF & Middle East	Iran	Imports IRRI and parboiled rice; trade continues through barter/private channels despite sanctions.
	UAE, Saudi Arabia	Steady buyers of IRRI and parboiled rice; UAE also re-exports Pakistani rice to GCC & North Africa.
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

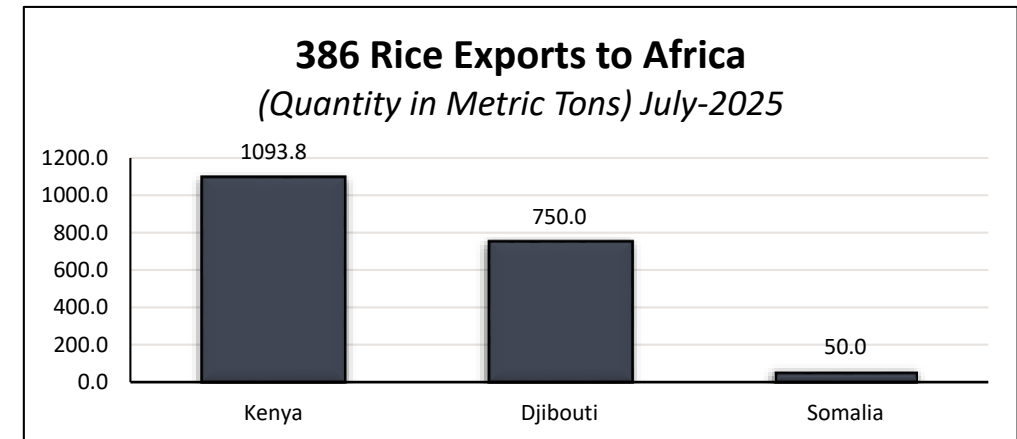
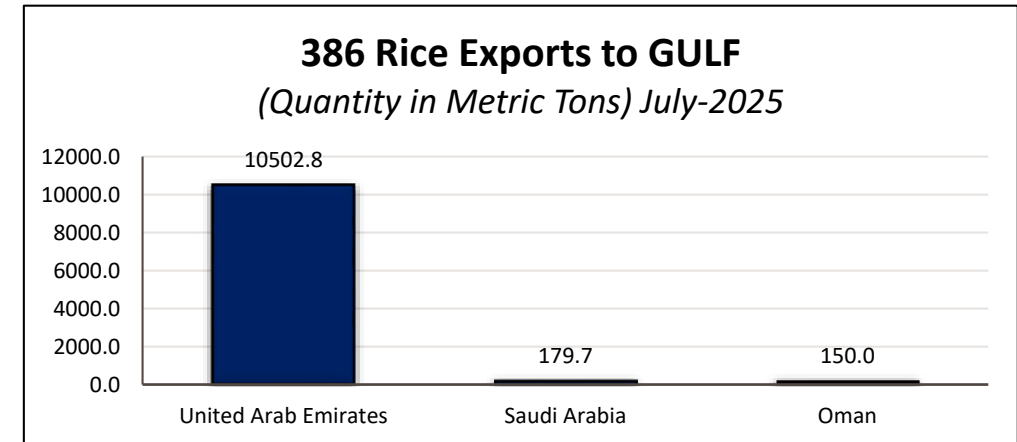
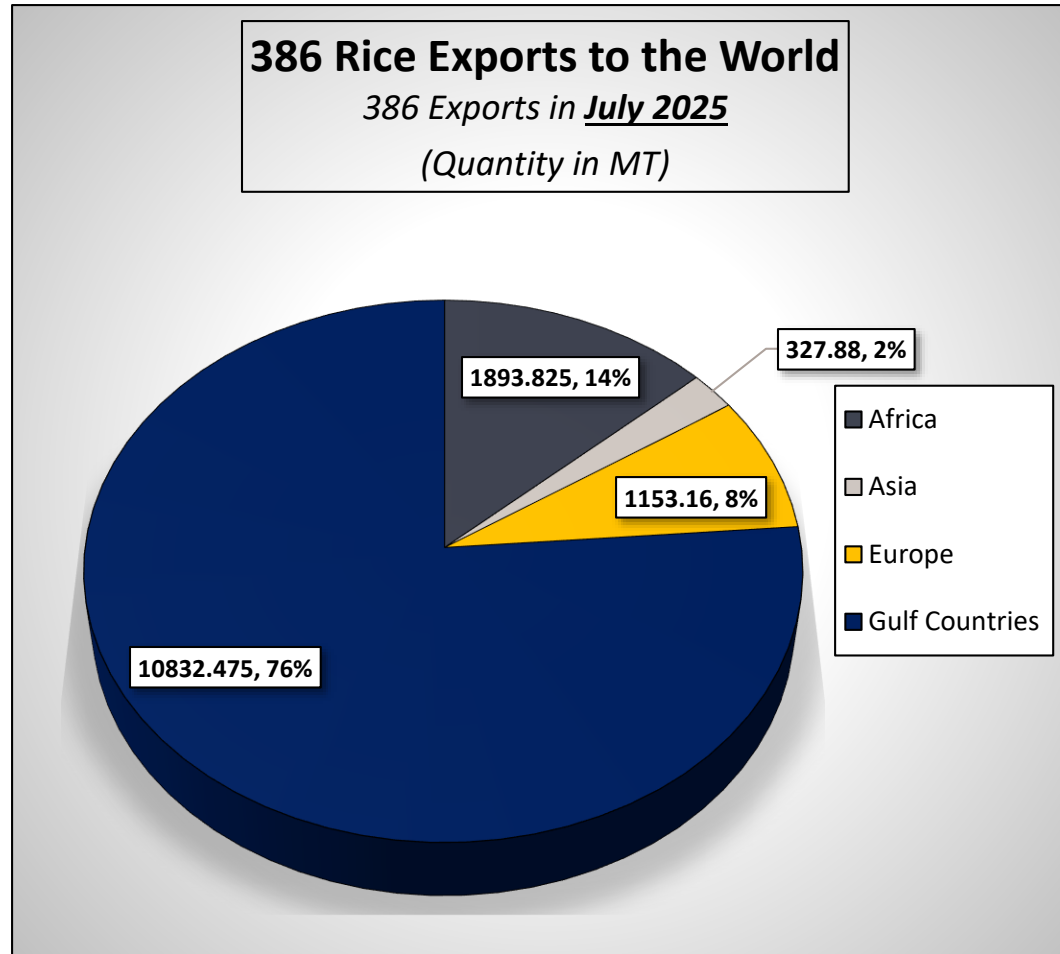
EMERGING NON-BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025 ; imports include parboiled and white rice
Southeast Asia	Indonesia	Govt. tenders led to ~61,000 MT import in 2024 ; continued interest in 2025
	Philippines	Philippines' import liberalization has opened new demand for Pakistani broken/parboiled rice.
Africa	Benin, Ghana, Nigeria	Strong demand for IRRI-6 and white rice via bulk shipments
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



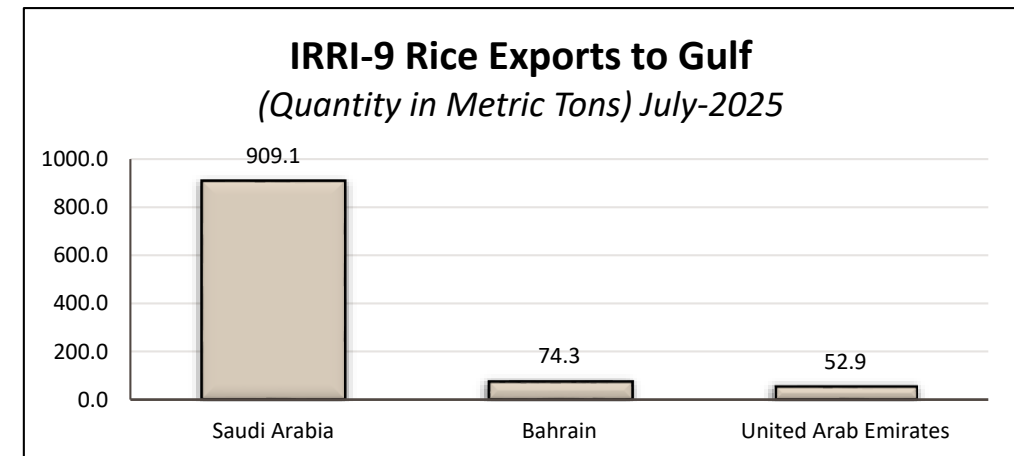
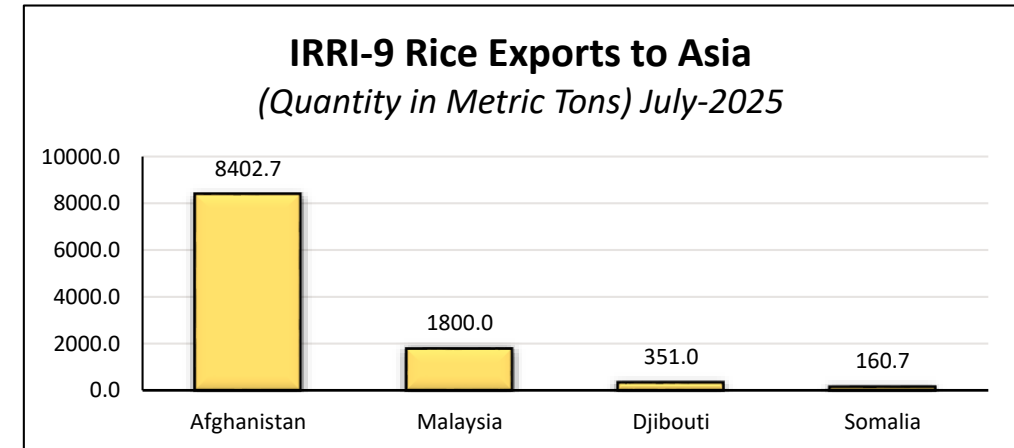
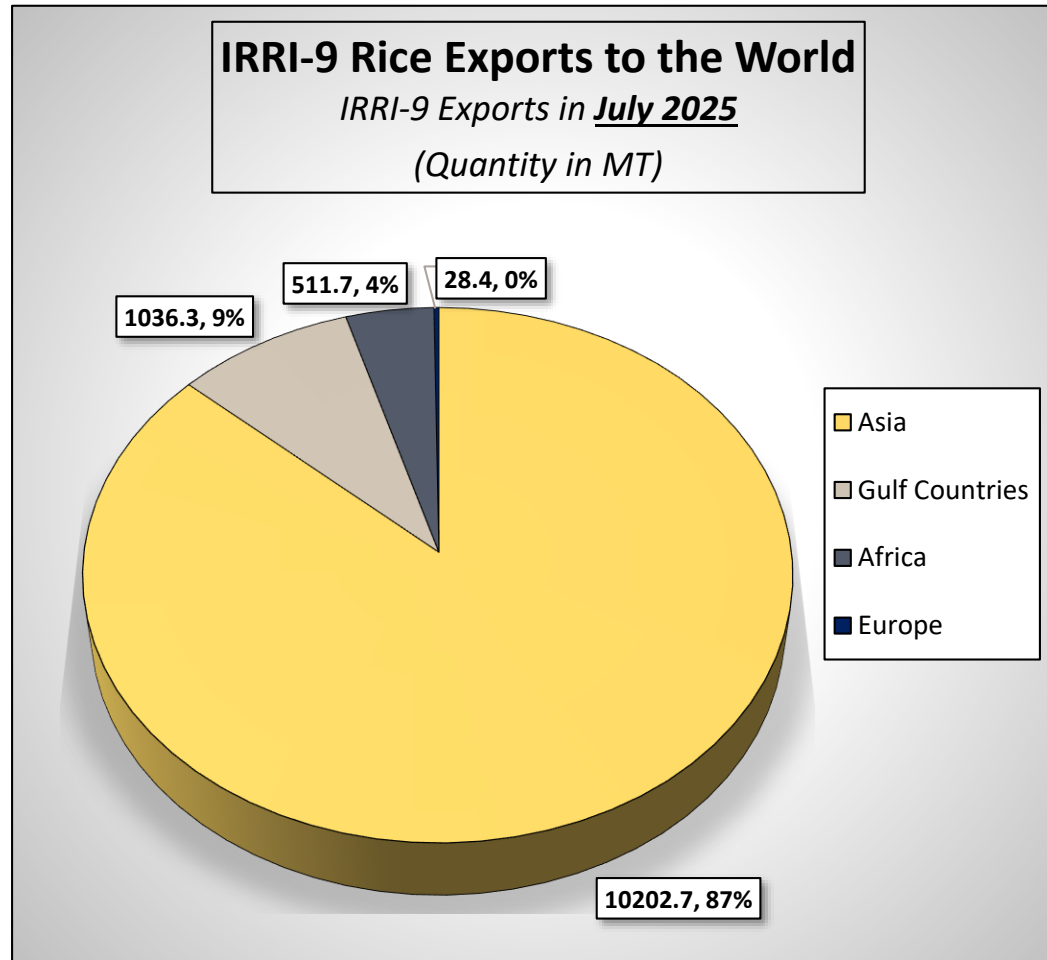
"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

386 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

IRRI-9 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

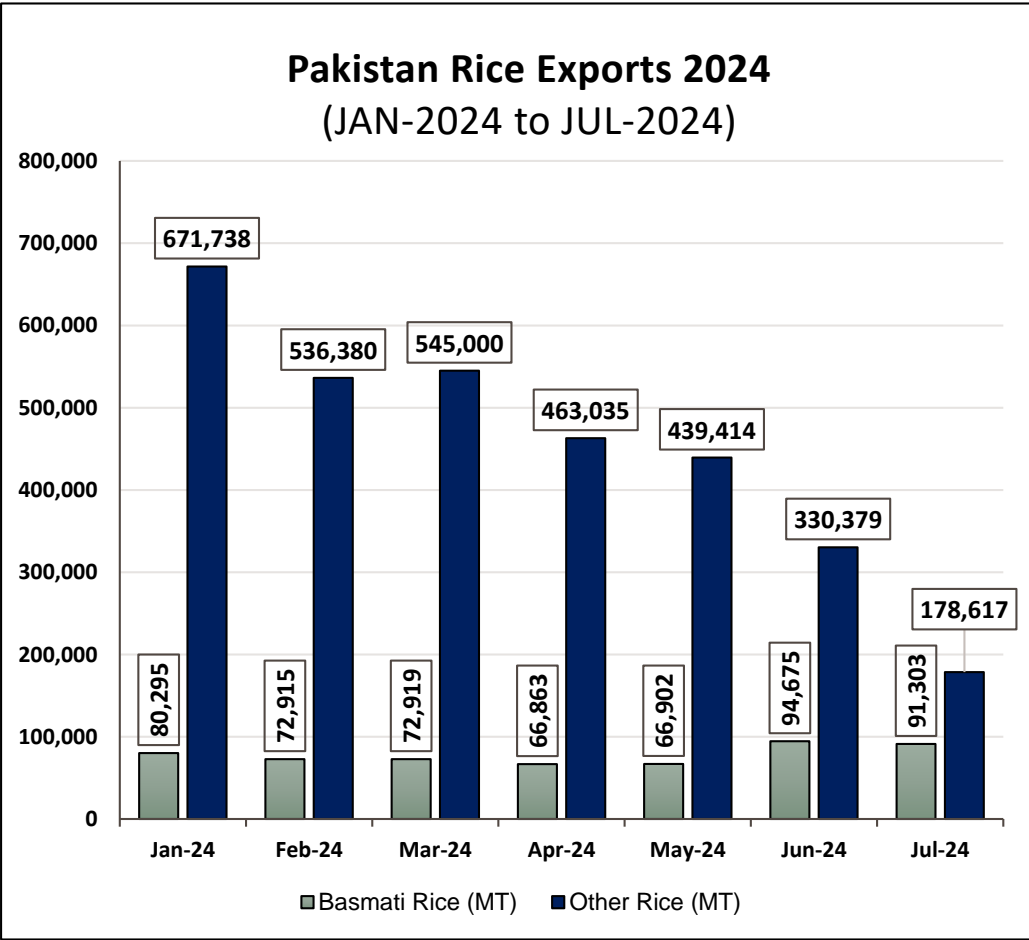
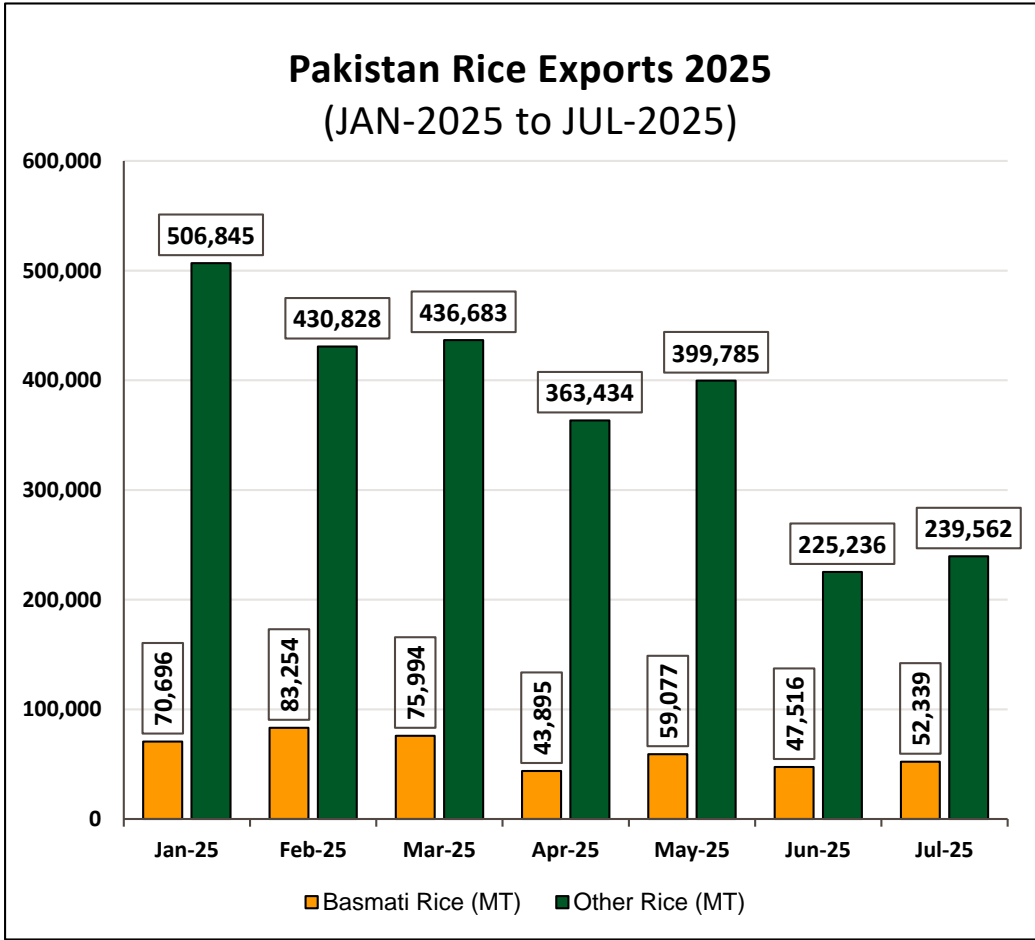
APPROVED BASMATI & NON- BASMATI VARIETIES OF PAKISTAN

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)

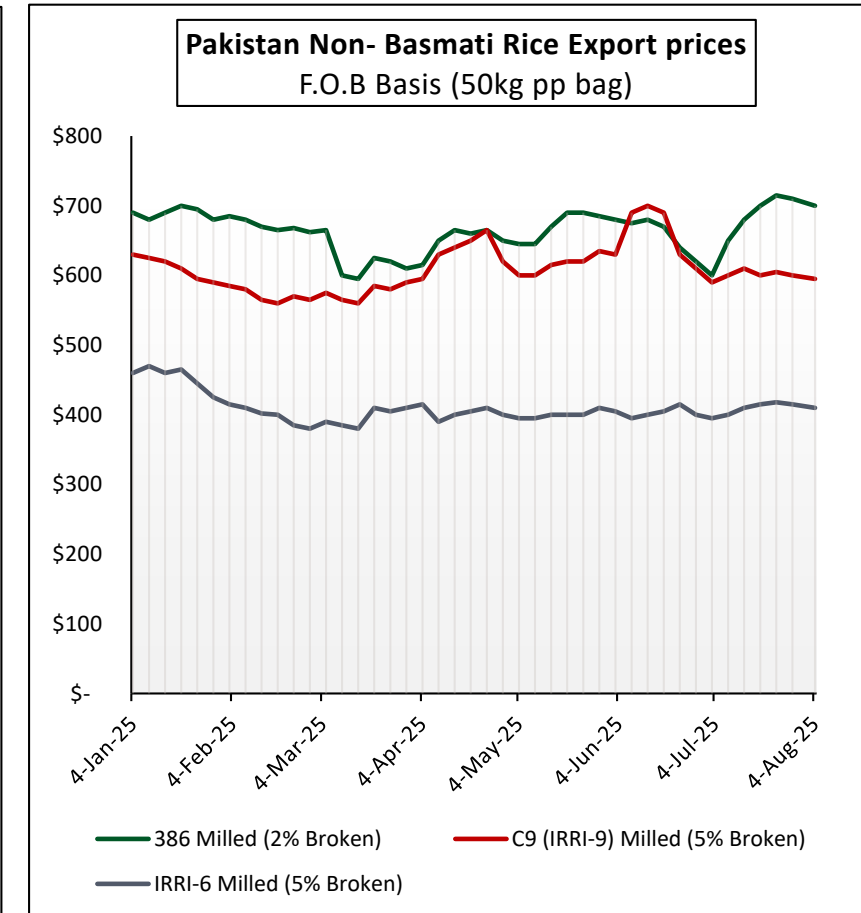
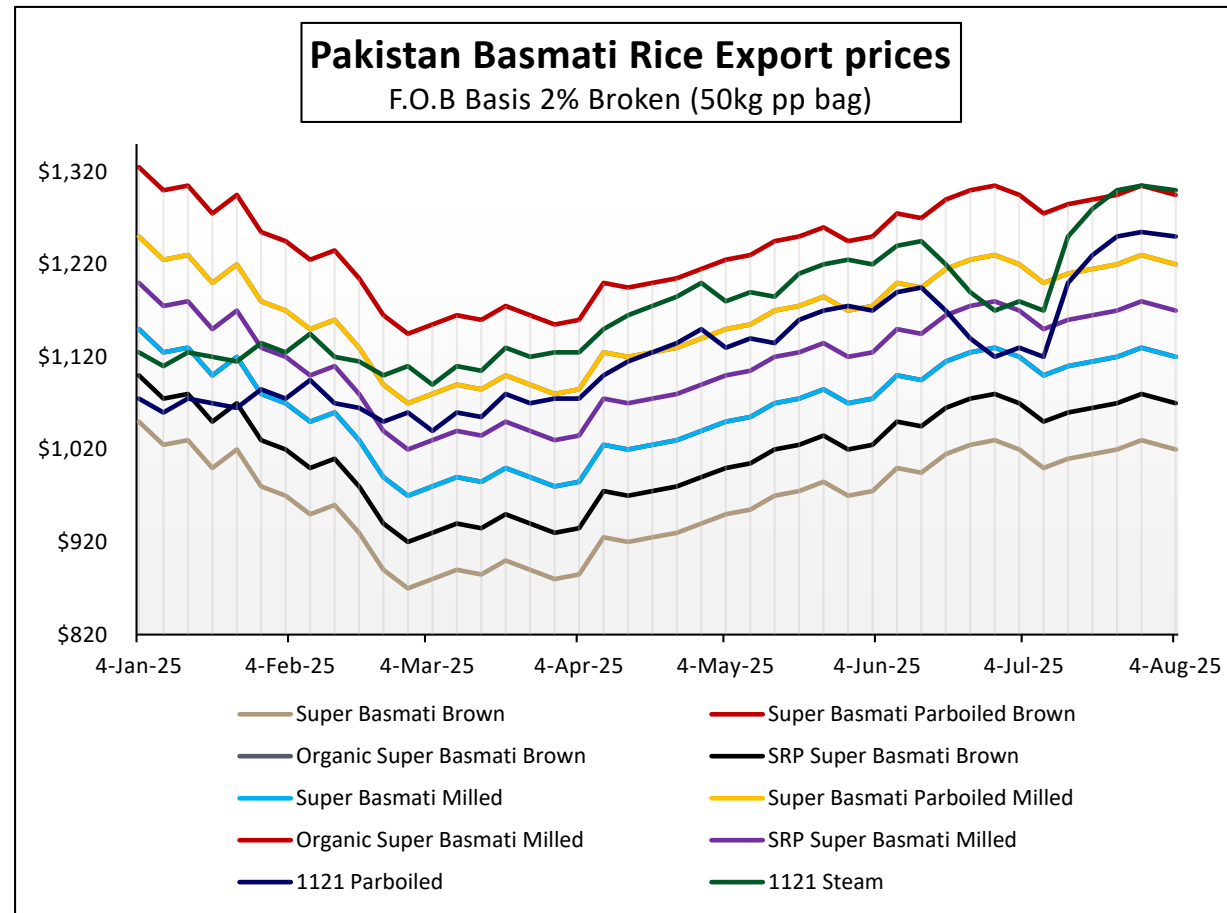


Source: Pakistan Bureau of statistics

PAKISTAN RICE PRICES COMPARISON:



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



Note: (in 1st graph) Although 10 varieties are listed, only 8 price lines appear on the chart because: (Super Basmati Parboiled Brown and Super Basmati Milled share the same FOB prices) & (Organic Super Basmati Brown and Super Basmati Parboiled Milled also share the same FOB prices)

For more details on Pakistan market rice prices Please click here: [Pakistan Rice Market](http://PakistanRiceMarket.com)

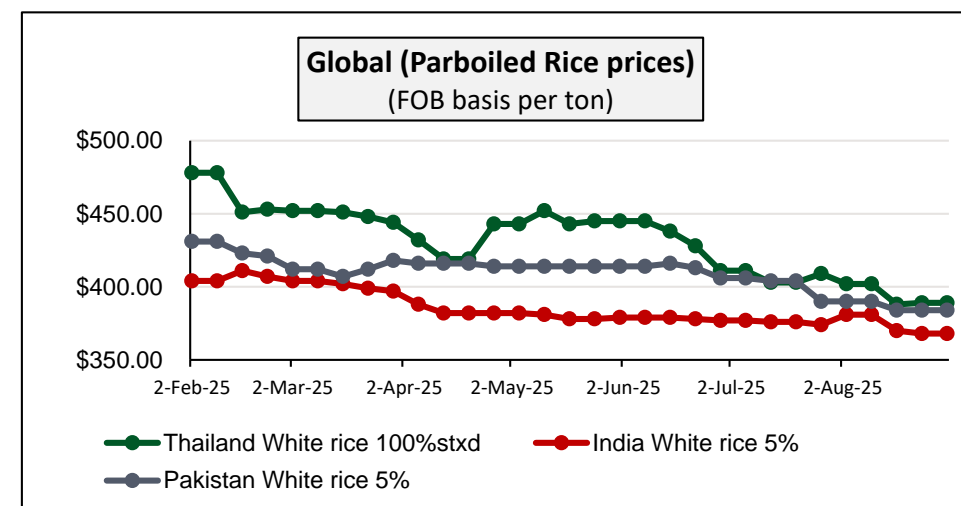
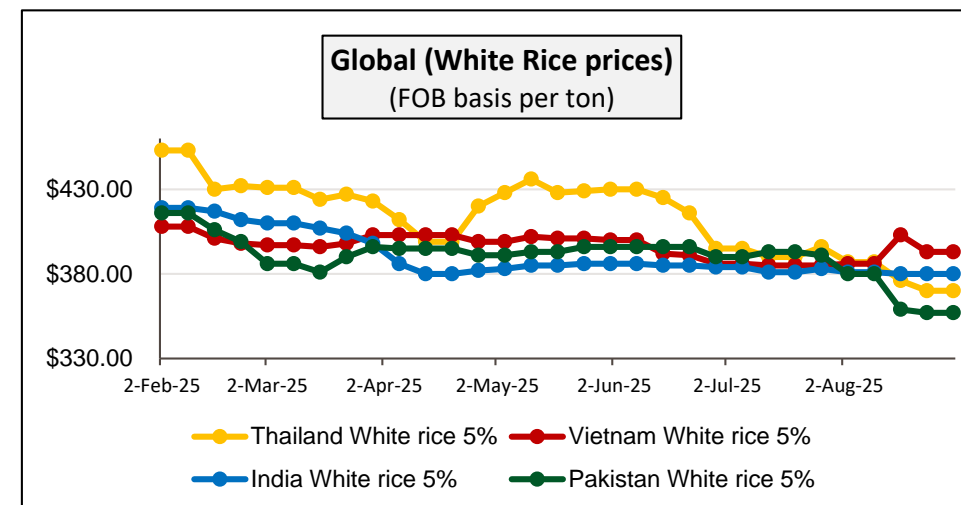
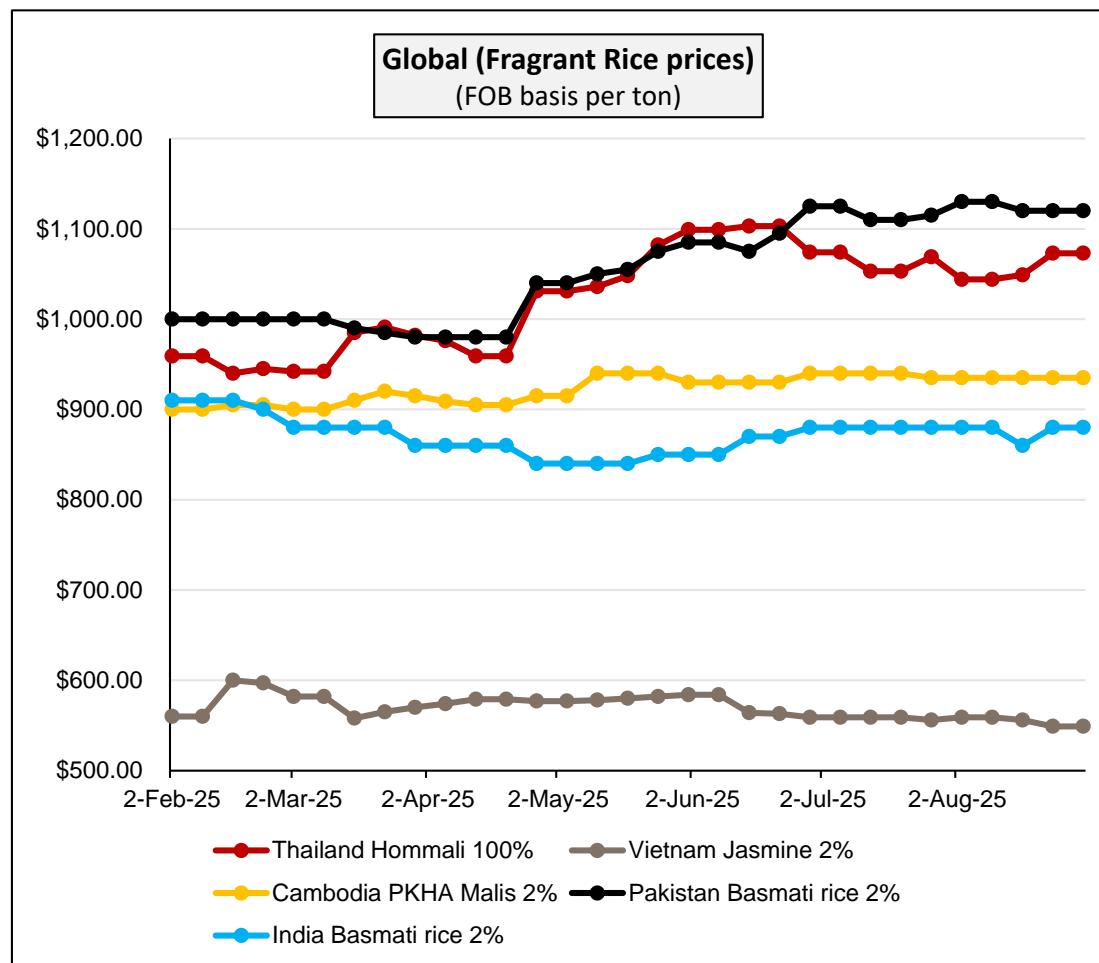
PAKISTAN RICE SECTOR – Key highlights of (August 2025)

- Pakistan introduced its first **Honglian-type hybrid rice seed** (Punjab University & Wuhan University, approved by PARC) with a yield potential of **up to 140 tons per acre** and strong resistance to bacterial diseases, marking a major research breakthrough and reducing reliance on imported Indian hybrids.
- A major export opportunity opened as the **US imposed 50% tariffs on Indian basmati**, compared to only **19% on Pakistani basmati**. Indian prices may rise to **\$1,800/MT**, while Pakistani basmati remains around **\$1,450/MT**. The US already accounts for **24% of Pakistan's basmati exports (1,519 shipments)**, followed by Italy (14%) and the UK (11%), together consuming nearly **half of Pakistan's basmati trade**.
- **Iran resumed rice imports** on August 3 to curb food inflation, while **Bangladesh reaffirmed its January 2025 MoU** after receiving 50,000 MT of Pakistani rice. Talks in Dhaka agreed on forming a **Joint Working Group** and reviving the **Joint Economic Commission (dormant since 2005)** to expand agricultural and rice cooperation, with further engagement expected at **FoodAg Expo Karachi in November**.
- In West Africa, Pakistan launched a **Rice Road Show in Ghana on August 27**, bringing together **28 exporters and 200+ buyers**. Pakistan shipped **5.5 MMT worth \$3.2B in FY24-25**, averaging 550,000 tons per month, and the campaign moved to **Côte d'Ivoire (Aug 28–29)** and **Senegal (Sep 1–2)** to secure long-term contracts and joint ventures.
- Challenges persist: **Basmati exports slumped 43% YoY in July 2025 to 52,339 tons**, while non-basmati rose to **239,562 tons**. The sharp fall is tied to **cheaper Indian supplies, a stronger PKR eroding margins, and regulatory delays** at DPP/NAFSA causing shipment cancellations and lost buyer confidence.
- Domestically, Punjab's rice cultivation surged to **6 million acres, 20% above target**, with timely rains cutting irrigation costs by **Rs 5,000 per acre** and reducing pest pressure. Basmati accounted for **20% of acreage**, with varieties including Super Basmati, 370, Basmati-Pak, Chenab Basmati, and Kissan Basmati. Farmers urged fair paddy prices, while exporters forecast earnings could **surpass \$4B in 2025**, supported by improved pesticide restrictions that boost acceptability in Europe and the US.

Source: News, Publications & Reports

GLOBAL RICE PRICES COMPARISON:

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



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

Source: TREA (Thai Rice Exporters Association)

US Tariff War Reshapes Global Basmati Trade



In August, the United States imposed a **50% duty on Indian basmati rice**, while **Pakistani basmati faces only 19%**. This not only created a **6% tariff advantage** for Pakistan but also widened the price gap by **nearly \$350/MT**, with Indian basmati nearing **\$1,800/MT** compared to **Pakistan's \$1,450/MT**.

Impact on India

- Indian exporters warn that shipments to the **US could decline by 50–80%** as rising landed costs erode competitiveness. The pressure is expected to ripple back to farmers across **Punjab, Haryana, Uttar Pradesh, Madhya Pradesh, and Rajasthan**. Reports also suggest that some Indian products are being re-labeled as Pakistani or Bangladeshi to bypass the tariffs.

Opportunity for Pakistan

- For Pakistan, this development presents a rare opening. The **US already absorbs 24%** of Pakistan's basmati exports, followed by **Italy with 14%** and the **UK with 11%**, together accounting for nearly half of its trade. Pakistan's basmati exports grew by **35%** in **FY24** to **772,725 MT** worth **\$876.9M**, with the average export price rising from **\$1,092** to **\$1,135/MT**.

Global Context

- The **USDA** reports that **US rice imports** have grown steadily from **7%** of domestic consumption in **1993–94** to more than **25%** in **2022–23**. Over **60%** of these imports consist of aromatic rice from Asia, led by **Thai jasmine** and **basmati from India and Pakistan**. With demand continuing to expand, **Pakistan** is well placed to secure long-term contracts and strengthen its brand presence in the **US market**.

Challenges Ahead

- To sustain this momentum, **Pakistan** must ensure strict quality control, address pesticide residue concerns, and maintain reliable supply chains. The advantage is tied to geopolitical tensions between the **US and India**, and any resolution could narrow Pakistan's edge. At the same time, exporters must balance rising foreign demand with domestic market needs to avoid local price pressures.

The tariff war marks a historic turning point in the global basmati trade. For India, it is a painful setback with consequences for both exporters and farmers. For Pakistan, it is a timely opportunity to capture a larger share of one of the world's most lucrative rice markets if it can deliver quality, scale, and trust when global buyers are watching closely.

MAJOR GLOBAL NEWS HIGHLIGHTS OF (August 2025):



- **Thailand** entered August under pressure as Vietnam overtook it as the world's **second-largest rice exporter**. From **Jan–Jun 2025**, Thailand shipped **3.73M tonnes**, down 27.3% YoY, compared to **Vietnam's 4.72M tonnes** and **India's 11.68M tonnes**. The **US also imposed a 19% tariff** on Thai imports, though exporters downplayed the impact, noting it remains close to **Vietnam's 20% duty**.
- Falling prices have become a serious concern. India's planned release of **20M tonnes** could **push FOB prices to \$280–300/MT**, far below Thailand's current **\$365–370/MT for 5% white rice**. Thai export values fell **36% in H1 2025 to 75.6B baht**, while paddy prices dropped to **5,000–6,000 baht/tonne**, straining farmers despite government subsidies.
- In response, **Thailand approved a \$1.8B** support package, including credit and loan programs to stabilize farmer incomes. The government still targets **7.5M tonnes of exports** this year, focusing on the US and China, but competition is intensifying. **Vietnam's premium ST rice**, priced at **\$800–850/MT**, is gaining share in key markets, while Japan is shifting towards **US rice** under a new tariff deal.

Source: News & Publications



- **Vietnam** has overtaken Thailand to become the world's **second-largest rice exporter in the first half of 2025**. Exports reached **5.5 million tonnes** valued at **\$2.81B**, **up 3.1% in volume but down 15.9% in value** due to falling prices. **The Philippines remained the top buyer with 42.6% share**, while shipments to **Ghana (+53.5%)** and **Côte d'Ivoire (+96.6%)** showed strong growth.
- Export prices averaged **\$514/tonne**, a steep **18.4%** drop from last year. The Philippines' plan to suspend imports for two months from September raised concerns, given its weight in Vietnam's portfolio, though a rush in pre-deadline buying lifted benchmark **5% broken rice prices to \$391/tonne**, keeping Vietnam slightly above India, Thailand, and Pakistan.
- Prime Minister Pham Minh Chinh has called for a shift towards high-value, sustainable rice to secure Vietnam's position. Plans include one million hectares of **low-emission**, high-quality rice fields by **2030** and greater focus on premium varieties **like ST25 for Japan, Korea, and the EU**. While volume growth strengthens Vietnam's standing, future success depends on branding, quality gains, and climate resilience.

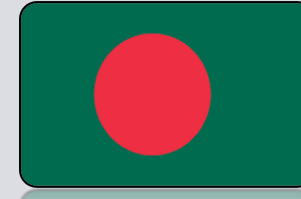
Source: News & Publications

MAJOR GLOBAL NEWS HIGHLIGHTS OF (August 2025):



- India maintained its position as the world's largest rice exporter in the first half of 2025, shipping a record **24M tonnes in Q2 alone** a **25%** year-on-year surge. Strong government reserves of **63M tonnes**, a weaker rupee, and aggressive export policies drove volumes higher, with buyers from **Africa, the Middle East, and Asia** snapping up discounted supplies.
- Key markets reopened in August, with Iran lifting its four-month import ban on Indian rice, a trade worth over **1M tonnes annually**. India also resumed shipments to Bangladesh, where Dhaka allowed duty-free imports of nearly **500,000 tonnes** to control inflation. The move triggered a sharp **14–15% jump in rice prices** across eastern India, especially West Bengal, as local demand tightened.
- While exports surged, challenges emerged from geopolitics. The **US imposed a 50% tariff on Indian basmati**, compared to Pakistan's **19%**, creating a sharp disadvantage in premium markets. At the same time, growers in Punjab and Haryana expressed concern over falling competitiveness. Still, India's pricing edge in non-basmati and its vast surplus stock continue to anchor its dominance in global rice trade.

Source: News & Publications



- **Bangladesh's rice imports** surged to a seven-year high in **FY25**, reaching **14.36 lakh tonnes**. Imports resumed after a four-month pause, with shipments arriving via Chattogram and Benapole ports. Contracts for **4.5 lakh tonnes** under nine packages are in place, with over **3 lakh tonnes** already delivered from India.
- Despite bumper harvests Aman **1.65 crore tonnes** and Boro **2.26 crore tonnes** prices defied supply trends. Retail rice is now **15–20% higher than** last year, even as reserves climbed to **19.17 lakh tonnes** in July, well above the **12.5-lakh-tonne** safety level. Analysts cite hoarding, corporate mill dominance, and unreliable data as drivers of the price crisis.
- The government has stepped in with open-market sales and the Food-Friendly Programme, providing **55 lakh families 30 kg** of rice per month at **Tk15/kg**. Still, experts warn data gaps and weak enforcement leave the market vulnerable, keeping consumers under pressure despite record output and imports.

Source: News & Publications

UPCOMING EVENTS:



Anuga 2025

Date: October 4, 2025 – October 8, 2025

Time (for visitors): 10:00 a.m. to 6:00 p.m.

For more details: <https://service.anuga.com/fairapplication/login>

Location: Cologne Marathon



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



Gulf Food Fair 2026

Date: January - 26, 2026 to January -30, 2026

Locations:

- Dubai world trade center
- Dubai expo city

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



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