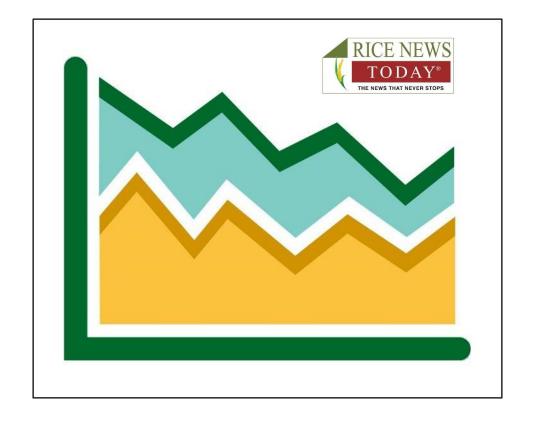
RICE MARKET REPORT

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

Monthly report "September 2025 Edition"

Dated: 25th September 2025





CONTENT COVERED IN THIS REPORT

What's Inside:

This report will cover the following topics:

- 1. Traditional & Emerging Basmati Markets
- 2. Top 10 Pakistan Basmati Brown Rice Import Markets
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- 4. Comparative Analysis of EU Basmati Rice Imports from India and Pakistan
- 5. Pakistan Rice Exports To World & Major Destinations (**Basmati**)
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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 C	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

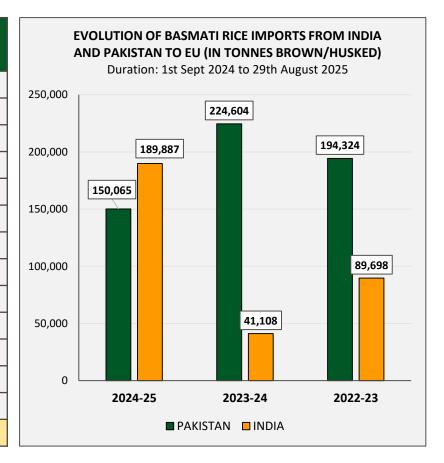
Comparative Analysis of EU Basmati Rice Imports from India and Pakistan



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

EU Basmati Rice Import Trends: PAKISTAN & INDIA



(2024–25 vs 2025–26)

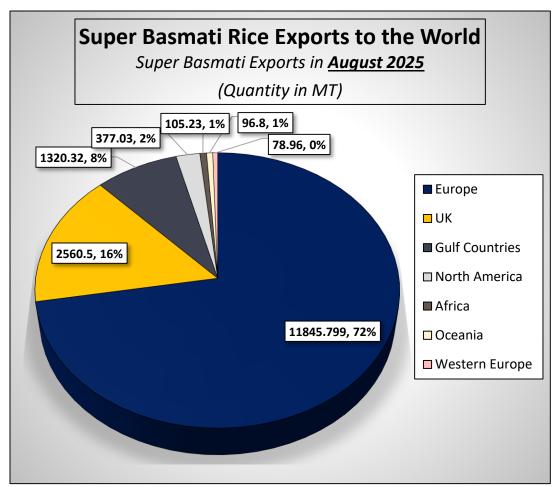
(2025-2026) EVOLUTION OF BASMATI RICE IMPORTS FROM INDIA AND PAKISTAN TO EU (IN TONNES BROWNHUSKED) Duration: 1st SEP-2025 to 31th AUG-2026 (Last updated on 16th September 2025).

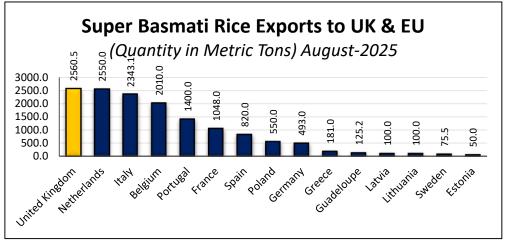
COUNTRIES	PAKISTAN (2025-26)	INDIA (2025-26)	TOTAL (2025-26)	PAKISTAN (2024-25)	INDIA (2024-25)	TOTAL (2024-25)
Belgium		675	675	3,990	300	4,290
Bulgaria			-			-
Czechia			-			-
Denmark		105	105	68		68
France		750	750	1,598		1,598
Germany		355	355			-
Greece			-			-
Italy	1,825	5,250	7,075	3,750	600	4,350
Netherlands	1,166	3,403	4,569	2,100	2,367	4,467
Poland		105	105			-
Portugal		500	500		250	250
Romania		250	250			-
Spain	350	250	600	1,572		1,572
Sweden			-			-
Grand Total	3,341	11,643	14,984	13,078	3,517	16,595

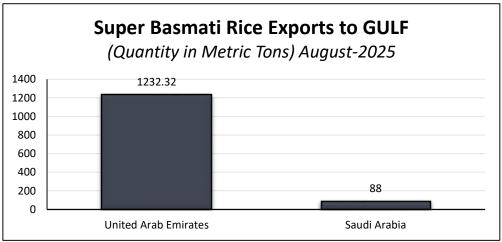
Source: European Commission

SUPER BASMATI EXPORTS TO THE WORLD & MAJOR DESTINATIONS





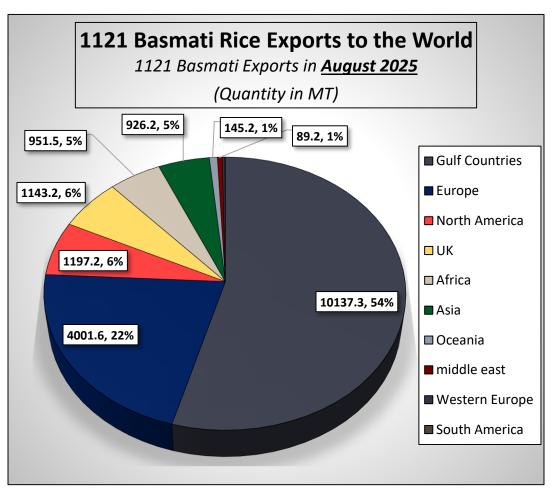


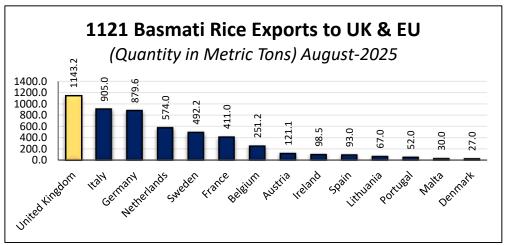


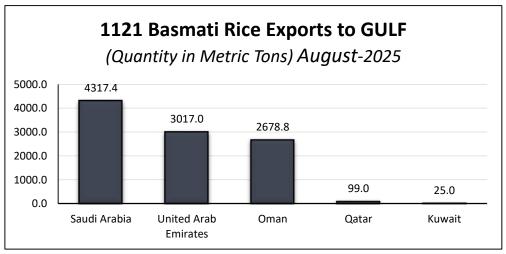
[&]quot;Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

1121 BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS









[&]quot;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

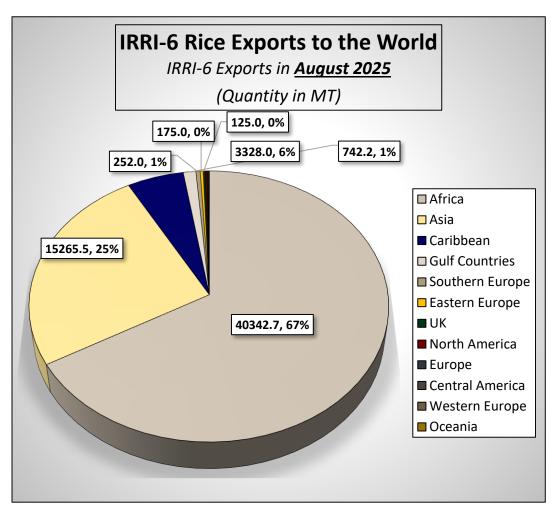
TRADITIONAL NON- BASMAIT IMI ORI MARKETS					
Region	Country	Key Highlights			
Africa	Kenya	Largest buyer; ~252,000 MT in 2024. Customs value cut \$615 → \$460/MT; duty-free quota of 500,000 MT till Dec 2025 ensures strong FY2025 demand.			
	Mozambique, Madagascar, Tanzania, Djibouti, Cote d Ivoire	Long-time 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			

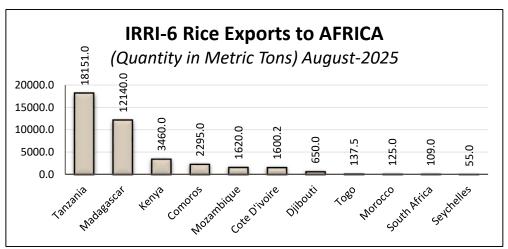
EMERGING NON-BASMATI IMPORT MARKETS

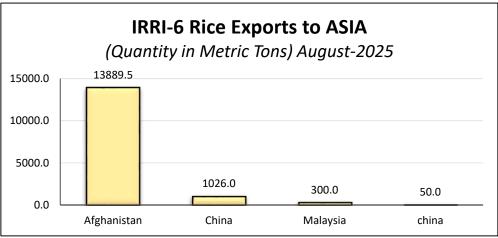
Region	Country	Key Highlights
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025 ; imports include parboiled and white rice
Southeast Asia	Indonesia	Govt. tenders led to ~61,000 MT import in 2024; continued interest in 2025
	Philippines	Philippines' import liberalization has opened new demand 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



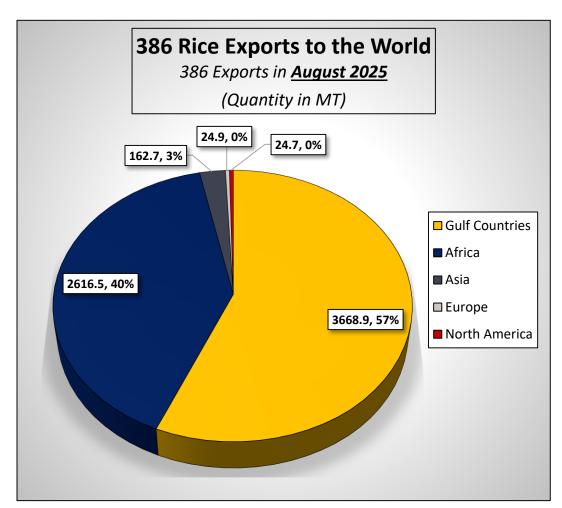


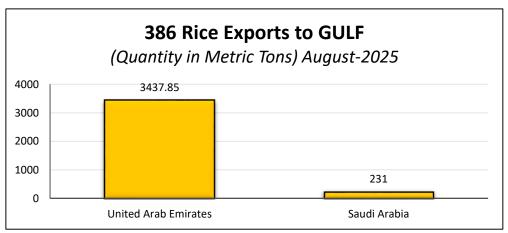


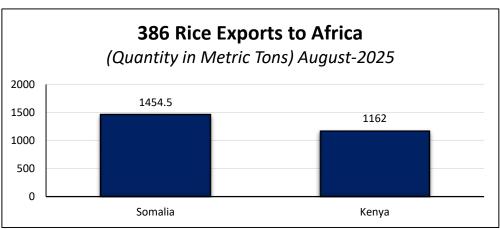
[&]quot;Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."



386 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



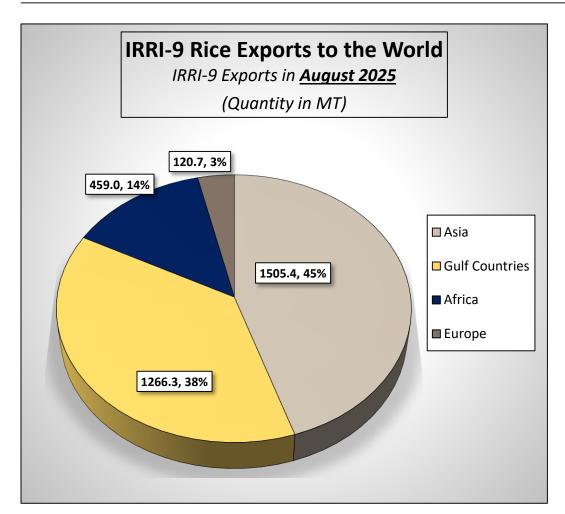


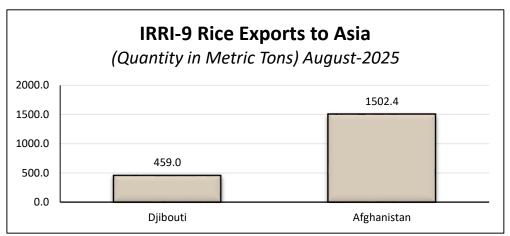


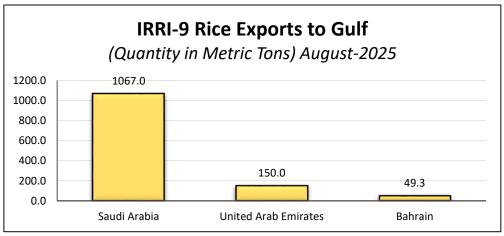
[&]quot;Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."



IRRI-9 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS







[&]quot;Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

APPROVED BASMATI & NON- BASMATI VARTIETIES 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: <u>Approved Basmati Rice Varieties</u>
Approved Non-Basmati Rice Varieties

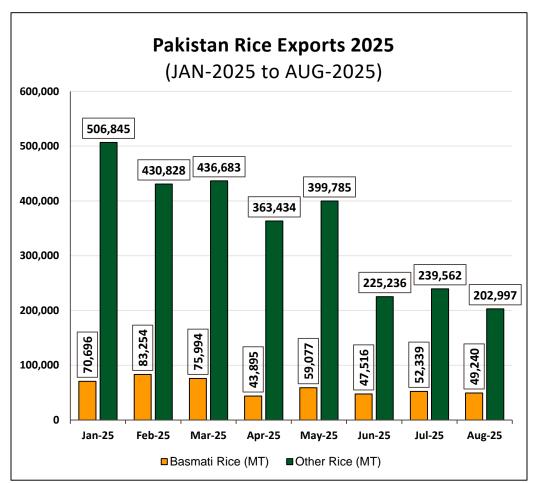
PAKISTAN RICE EXPORTS COMPARISON:

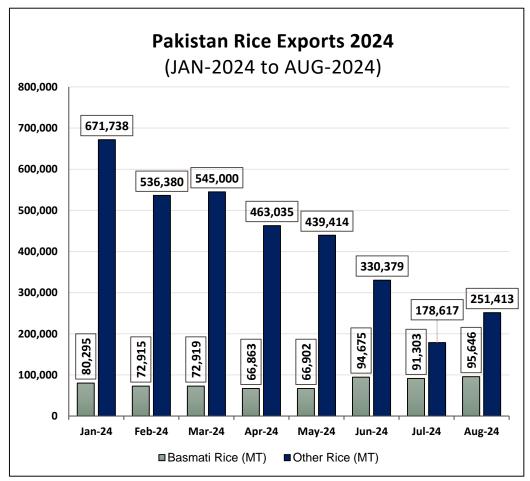
RICE NEWS

TODAY*

THE NEWS THAT NEVER STOPS

(2024 & 2025)





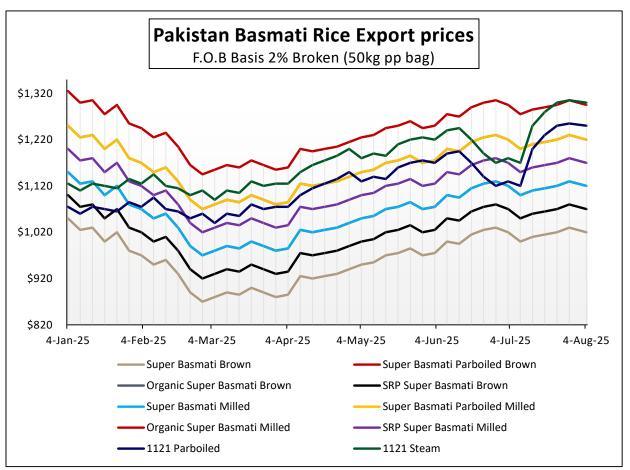
Source: Pakistan Bureau of statistics

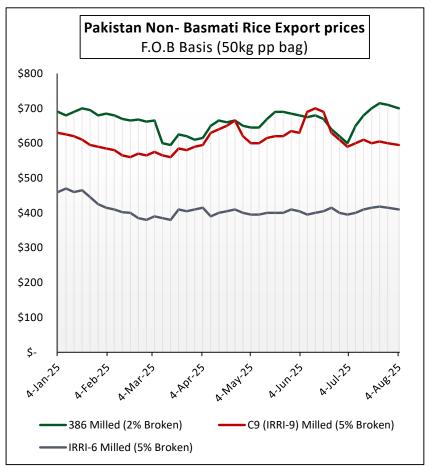
PAKISTAN RICE PRICES COMPARSON:





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



PAKISTAN RICE SECTOR – Key highlights of (September 2025)

- O A Senate panel was told that approvals for **104 consignments** of substandard rice seized by the **EU in 2024** were allegedly granted at the highest level. Only three **DPP officials** were dismissed, while the DG post remains held by a customs officer rather than a plant protection expert, raising concerns of scapegoating and weak regulatory oversight in Pakistan's export system.
- o **REAP estimated flood damage at 10–12%** of Punjab's rice crop (600,000–700,000 acres), rejecting exaggerated 60% claims as harmful for exports. A joint government–REAP report later confirmed about 1 million acres impacted, 370,000 acres destroyed, and an expected 9% drop in national output, which may support global rice prices that have already fallen 40% from January 2024's 15-year highs.
- o Rice exports fell 32% YoY in July-August 2025 to 545,403 MT worth \$314m, compared to 616,744 MT (\$465m) last year. Basmati dropped 45% to 101,934 MT (\$107m) while non-basmati held steady at 443,469 MT (\$207m). Overall food exports declined 23% to \$775m, while food imports jumped 37% to \$1.47b, widening the deficit.
- o Pakistan's use of Chinese Honglian hybrid rice expanded, now covering 40% of the hybrid seed market. The new PU786 variety (approved July 2025) can triple yields from 1,600 → 5,600 kg/acre, outperforming local varieties by 12%. Cultivated worldwide on 45m hectares, Honglian is helping boost resilience and food security under CPEC-linked research cooperation.
- O Punjab announced a 'Hi-Tech Bank Financing Programme' and a special compensation package for flood-affected farmers, with **over 6 million acres** under rice cultivation this year (**20% above target**). Alongside, **TDAP, DPP, and REAP** launched a nationwide seminar series on pesticide residues and aflatoxin, training farmers and exporters across Punjab and Sindh to meet the **EU's strict 4 ppb aflatoxin limit and reduce rejections**.
- o PBS reported mixed inflation in September: wheat flour prices fell 9.8%, chicken 3.2%, while **rice rose 1.63%**, onions 12.17%, and tomatoes 10.47%. On a yearly basis, tomatoes surged 90%, sugar 29%, and flour 18.6%, underscoring persistent pressure on consumer budgets despite slight relief in weekly inflation (-0.2%).

Source: News, Publications & Reports

GLOBAL RICE PRICES COMPARISON: Comparison





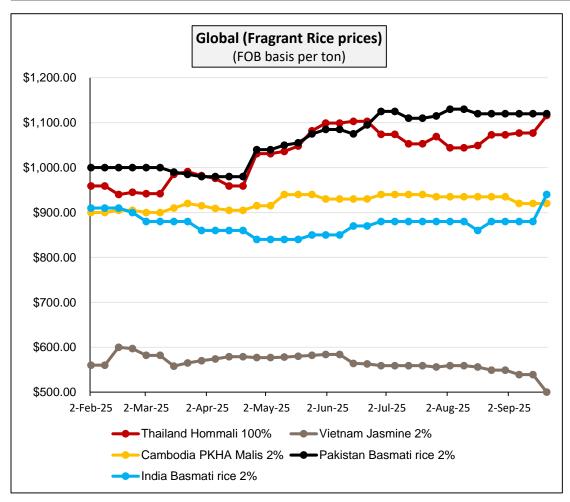


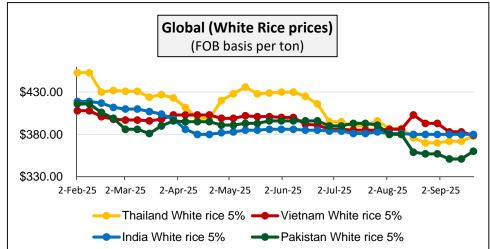


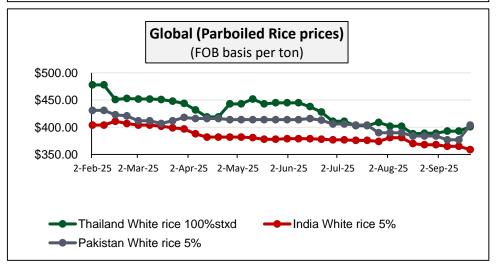




EXPORT PRICES F.O.B BASIS (PER TON)







For more details on global rice prices Please click here: Global Rice Market

Source: TREA (Thai Rice Exporters Association)



Major Highlight – Flood 2025: Impact on Pakistan's Rice Crop

- <u>Rumors vs. reality</u> As floodwaters rose across Punjab, early media headlines screamed of a "60% crop wipeout." Panic spread in markets and WhatsApp groups, fueling fears of shortages. But REAP and independent surveys calmed the storm, confirming losses closer to 10–12% (≈654,000 acres), not the catastrophe first imagined.
- The true picture A joint government–REAP report later painted a clearer view: 1 million acres impacted, 370,000 acres destroyed. That's about 15% of the total rice area, still serious but far from collapse. Punjab, which produces the bulk of Basmati, saw its worst flooding in 30 years, with yields expected to dip ≈9%.
- O <u>Basmati under pressure</u>, <u>Sindh holding strong</u> In Punjab's heartland, some farmers lost entire fields, with <u>140 villages reporting heavy damage</u>. Yet Basmati losses remained at <u>5–6%</u>, with resilient varieties like <u>1718</u> and <u>1509</u> surviving. Sindh's non-Basmati belt stayed largely safe, ensuring Pakistan's export backbone was not broken.
- <u>From loss to resilience</u> The story doesn't end with destruction. Rice acreage this year actually expanded to 12.2 million acres (up from 11.2m), and enriched soils may boost yields 20–25% in healthier zones. Despite floods, Pakistan could still harvest ≈12 million acres worth of rice one of its biggest crops in history.
- Exports stay on track REAP reassured buyers that Pakistan will ship up to 8 million tons this year, compared to 6m tons (\$3.2b) last year. This resilience positions Pakistan to climb from the world's 4th to the 3rd-largest rice exporter within five years, even as Basmati prices ticked up by \$50/ton amid uncertainty.
- O Global ripple effect With world rice prices already down 40% from Jan 2024 highs, Pakistan's reduced supply may slow the decline, offering rivals India, Vietnam, and Thailand a breather. At home, the government vowed tough action against hoarders exploiting fear to drive prices higher.
- o <u>A sector tested</u>, a sector standing The floods displaced 4 million people and killed 1,000+, but Pakistan's rice sector stood resilient. Verified numbers replaced rumors, export commitments held steady, and confidence returned to global buyers a reminder that even in crisis, the country's rice remains its enduring strength.

Source: News, Publications & Reports



MAJOR GLOBAL NEWS HIGHLIGHTS OF (September 2025):



- ➤ Record stocks and exports India's rice reserves rose 14% YoY to a record 48.2m tons by Sept 1, far above the 13.5m-ton target. With export curbs lifted in March, shipments are projected to hit 22.5m tons in 2025, nearly 25% higher than last year, keeping India as the supplier of 40% of global rice trade.
- Punjab floods hit Basmati belt Heavy rains submerged ≈150,000 acres of Basmati in Punjab, pushing prices up 8–10% domestically and 5–7% abroad in key markets like Saudi Arabia, UAE, and the UK. Yet India still exports 4m+ tons of Basmati annually worth \$5b, and recovery is underway with government relief and climate-smart practices.
- ➤ Shifting procurement & markets To offset Punjab and Haryana's 10—15% crop losses, exporters are sourcing more from Haryana, Uttar Pradesh, and Madhya Pradesh. April—Aug 2025 Basmati exports rose 15% YoY to 3.1m tons (\$1.74b), while domestic prices climbed 10—14%. With US tariffs hurting sales, exporters are diversifying into the Middle East, Europe, Africa, and Latin America.



- Fresh import tender launched Bangladesh's state grain buyer issued an international tender for 50,000 MT of non-basmati parboiled rice, with offers due by October 6 and shipment to Chittagong and Mongla within 40 days of award. The move comes as domestic prices remain 15–20% higher YoY, despite healthy stocks and earlier imports.
- Market volatility despite stocks In Khulna, rice prices surged to Tk 53–80/kg, even though government warehouses hold **84,000 MT** and supplies remain stable from a bumper boro harvest, OMS sales, and imports via Benapole, Bhomra, and Chattogram. Officials fixed coarse rice at **Tk 53–55/kg** and fine rice at **Tk 73–74/kg**, but market rates climbed higher as traders accused corporate millers of hoarding paddy to inflate prices.
- ▶ Imports bring short-term relief Between Aug 12–Sept 17, Bangladesh imported 104,859 MT via Hili Land Port on 2,421 Indian trucks at a 2% tariff. Prices in Dinajpur fell Tk 4–6/kg, with coarse rice at Tk 50–51 and fine Shompa Katari at Tk 68/kg, signaling that continued imports could further cool the market.

Source: News & Publications

Source: News & Publications



MAJOR GLOBAL NEWS HIGHLIGHTS OF (September 2025):



- Thailand's rice sector faced headwinds in **September 2025**, as **exports fell 26% year-on-year to 3.87 million tons** by mid-August, compared to **5.29 million tons** last year. The decline pushed Thailand from the second to the third-largest exporter globally, behind **India** and **Vietnam**. Fierce price competition from India's lower offers, weakening demand from key buyers like Indonesia and the Philippines, and volatility in the Thai baht all undermined competitiveness.
- ➤ To ease pressure, the government introduced a **37.9 billion baht** (\$1.2 billion) support package. Registered households will receive **1,000 baht** per rai (≈\$4.9 per hectare), capped at 10,000 baht (\$309) each, covering more than **5.49 million farms**. Alongside, the Department of Foreign Trade led a trade mission to Japan, aiming to maintain annual exports of around **300,000 tons**.
- ➤ Thailand also strengthened its premium image in Australia, where Thai rice holds a **35% market share**, following a successful promotional campaign at the Fine Food **Australia 2025 expo**.



- ➤ Vietnam stayed resilient while others struggled, exporting 5.5 million tons worth \$2.81 billion in Jan–July 2025. Revenues dipped 16% on falling global prices, but volumes rose 3%, keeping Vietnam second after India and ahead of Thailand. The Vietnam Food Association expects 8 million tons this year, driven by fragrant OM, DT, ST, and sticky rice varieties. The Philippines, taking 40–45% of Vietnam's shipments, suspended imports in September to protect local farmers, creating near-term hurdles. Still, China has doubled purchases and Africa is emerging as a strong outlet, helping offset the dip.
- At home, state firms are stockpiling hundreds of thousands of tons to stabilize supply. By August, 3.13m hectares were harvested, yielding 20.5m tons, with the autumn-winter crop set to add another 13.8m tons. Yet a new 5% VAT on exports has locked up around VND 2 trillion (\$76m) in refunds, squeezing liquidity. Exporters warn that without faster refunds and better storage and milling infrastructure, Vietnam risks cash flow issues and supply chain congestion during peak harvests.

Source: News & Publications Source: News & Publications







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 PenhVillage 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

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