



RICE MARKET REPORT

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

Monthly report **"October 2025 Edition"**

Dated: 25th October 2025

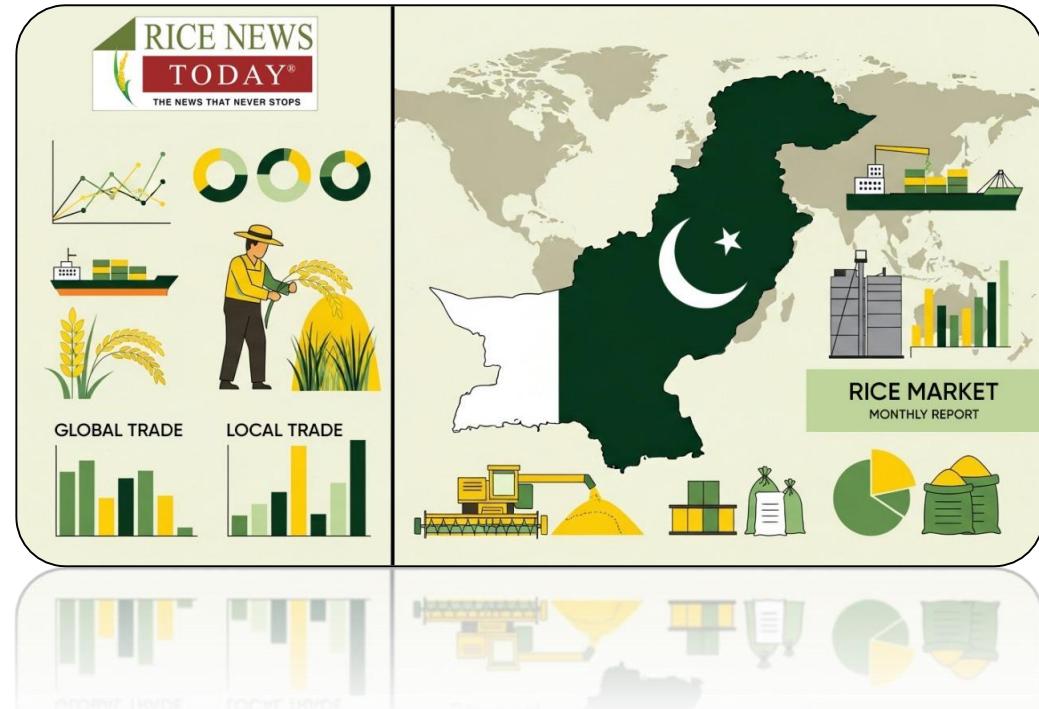


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Mapping Traditional and Emerging Import Markets for Pakistani Basmati Rice



TRADITIONAL BASMATI IMPORT MARKETS			EMERGING BASMATI IMPORT MARKETS		
Region	Country	Key Highlights	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.	Southeast Asia	Malaysia	Increased interest after India's export disruption; retail & industrial buyers active
GULF & Middle East	UAE	One of the largest buyers; consistent demand for both traditional and premium Basmati		Indonesia	Rising demand for parboiled & aromatic Basmati; steady growth
	Saudi Arabia	Traditional buyer; increasing demand for aged and aromatic varieties		Philippines	New entry point with public-sector G2G imports
	Iran	Resumed barter trade in FY2024–25 ; vital buyer despite logistical challenges	South Asia	Bangladesh	First-ever G2G rice deal signed in 2025; includes premium varieties
	Oman, Qatar	Smaller but steady volumes; part of GCC distribution hub	East Asia	China	Importing broken rice & trying Basmati blends; demand rising for aromatic, cost-efficient varieties
Africa	Kenya	Key African market; mix of basmati and non-basmati shipments	Africa	Somalia, Benin, Ghana	Expanding trade networks; growing basmati interest among traders
North America	USA, Canada	Premium-focused market; growing demand for organic & low-residue rice	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.

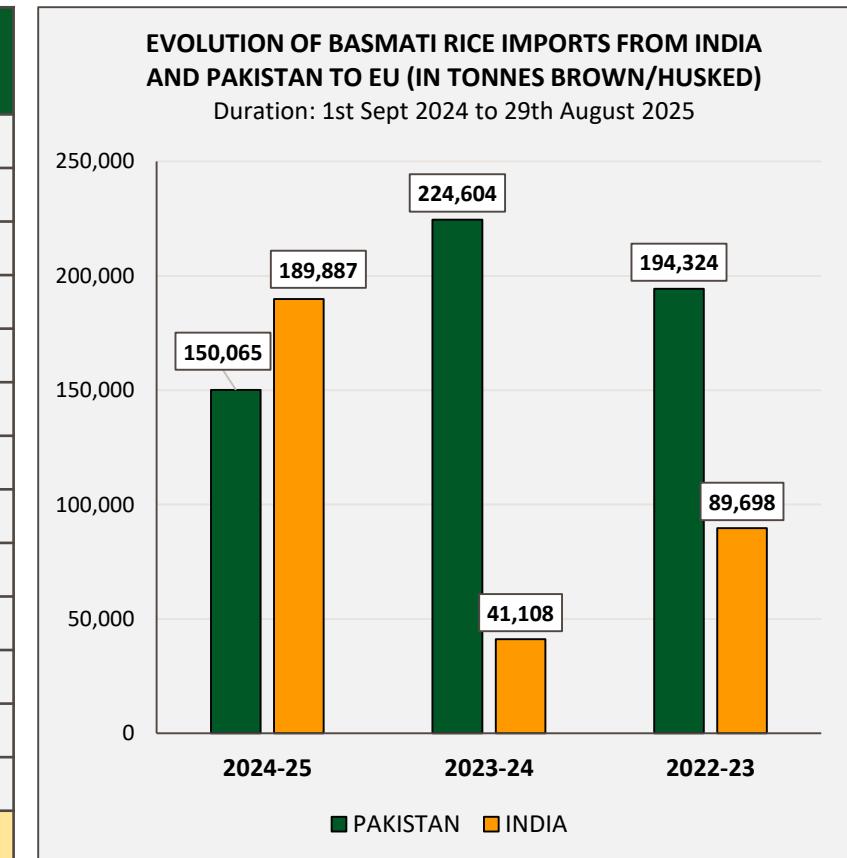
Comparative Analysis of EU Basmati Rice Imports from India and Pakistan



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)



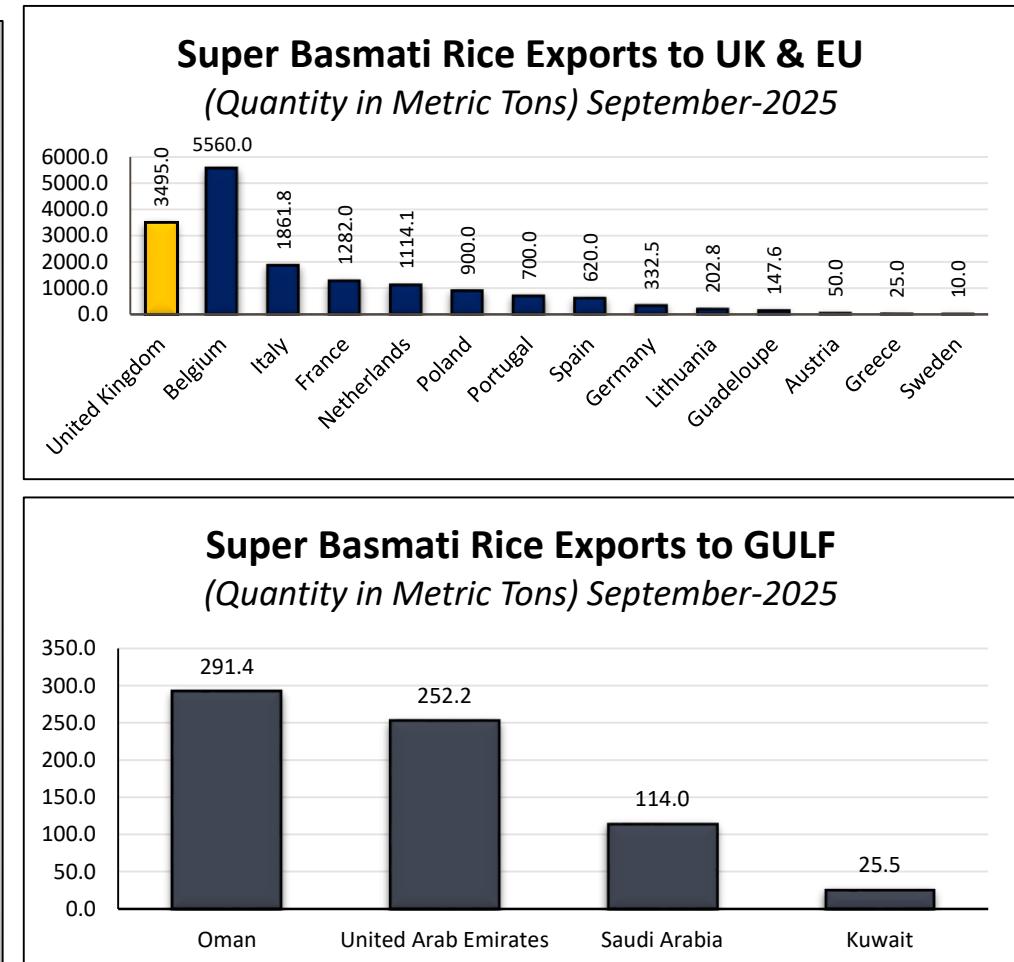
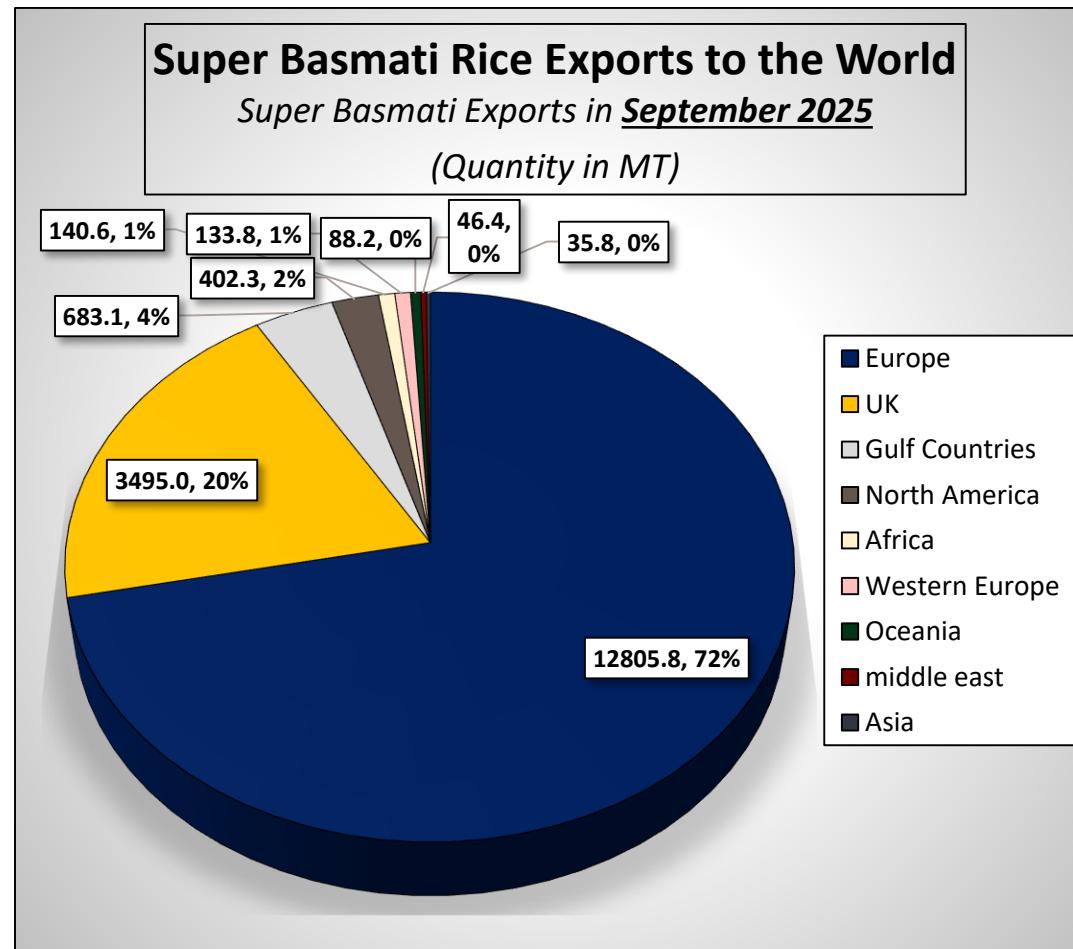
(2025-2026) EVOLUTION OF BASMATI RICE IMPORTS FROM INDIA AND PAKISTAN TO EU (IN TONNES BROWNHUSKED)

Duration: 1st SEP-2025 to 31th AUG-2026 (Last updated on 14th October 2025).

COUNTRIES	PAKISTAN (2025-26)	INDIA (2025-26)	TOTAL (2025-26)	PAKISTAN (2024-25)	INDIA (2024-25)	TOTAL (2024-25)
Belgium	500	1,175	1,675	6,760	300	7,060
Bulgaria			-			-
Czechia			-			-
Denmark	1,100	105	1,205	398		398
France	2,200	4,600	6,800	5,833	203	6,036
Germany		1,023	1,023	674	105	779
Greece			-			-
Italy	3,600	9,975	13,575	7,475	1,149	8,624
Netherlands	3,116	8,213	11,329	8,439	4,037	12,476
Poland		105	105	1,096	599	1,695
Portugal		1,150	1,150	1,698	250	1,948
Romania		726	726			-
Spain	2,550	1,475	4,025	4,313	199	4,512
Sweden			-			-
Grand Total	13,066	28,547	41,613	36,686	6,842	43,528

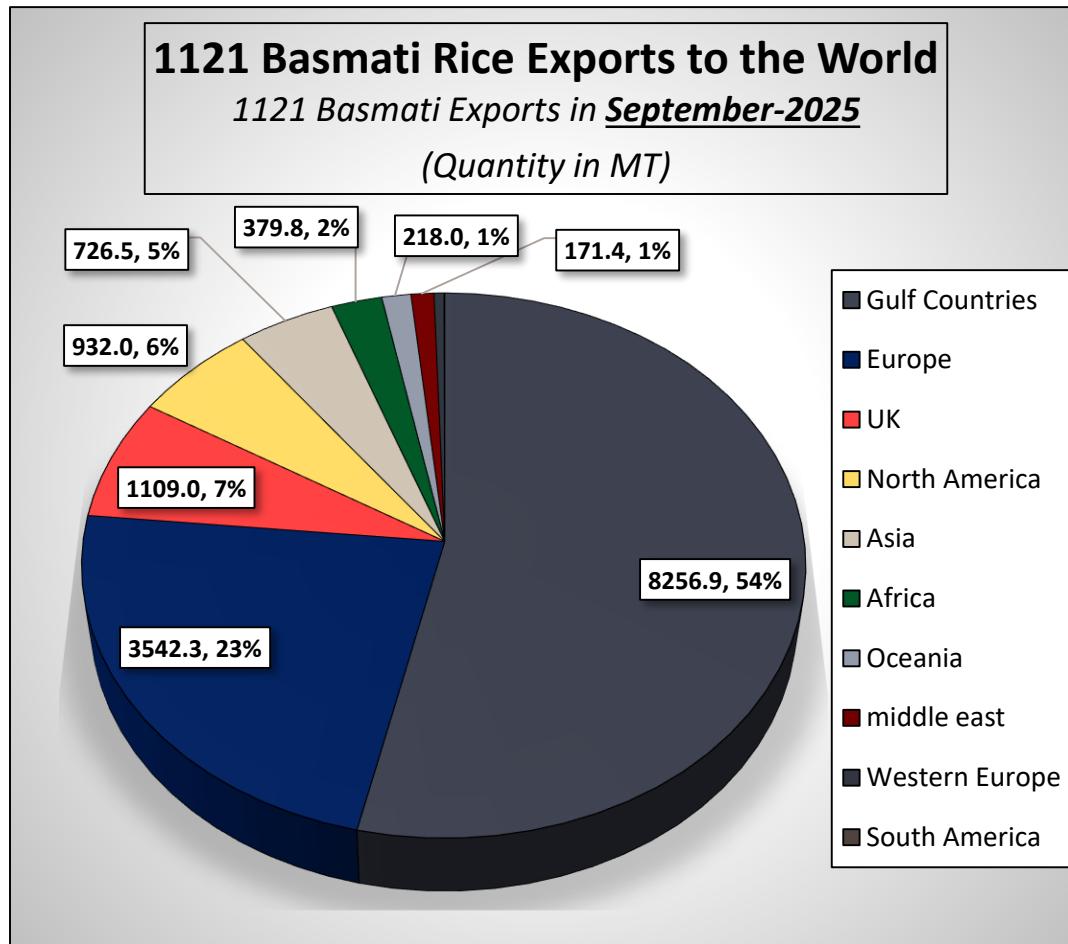
Source: European Commission

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



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



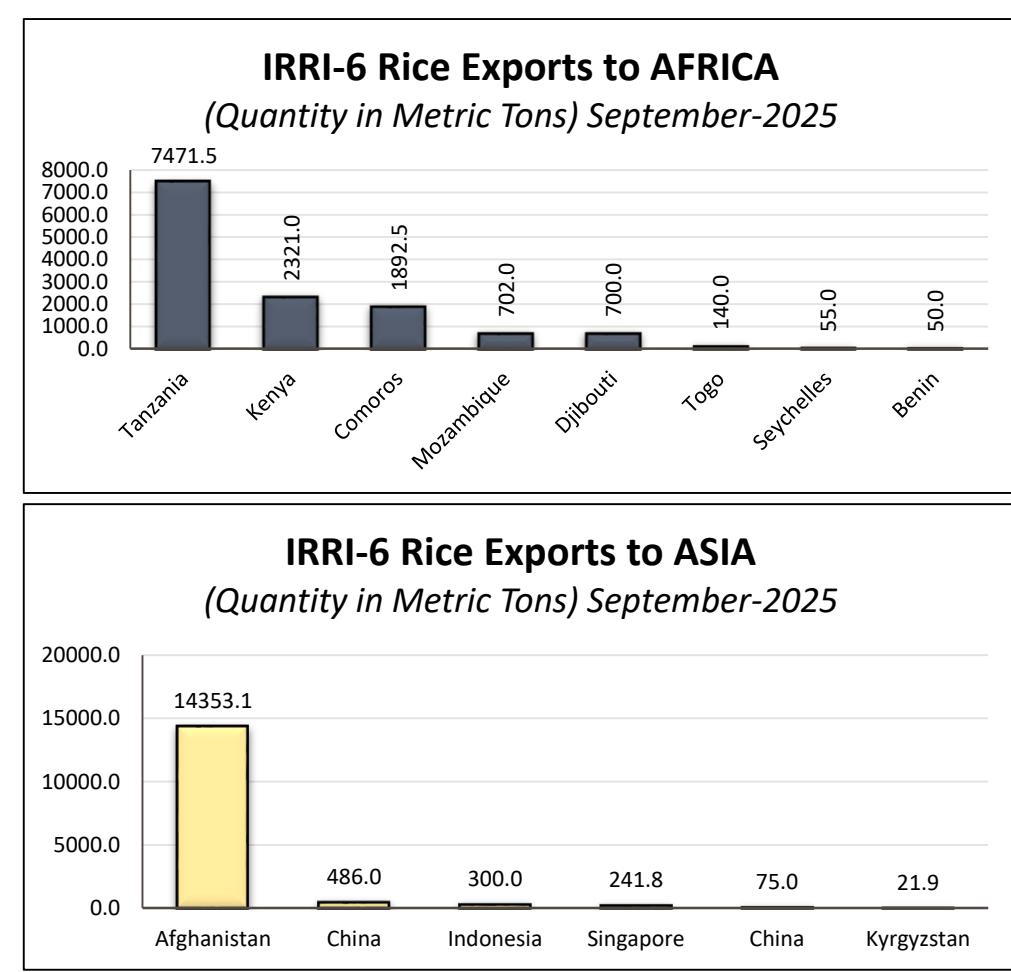
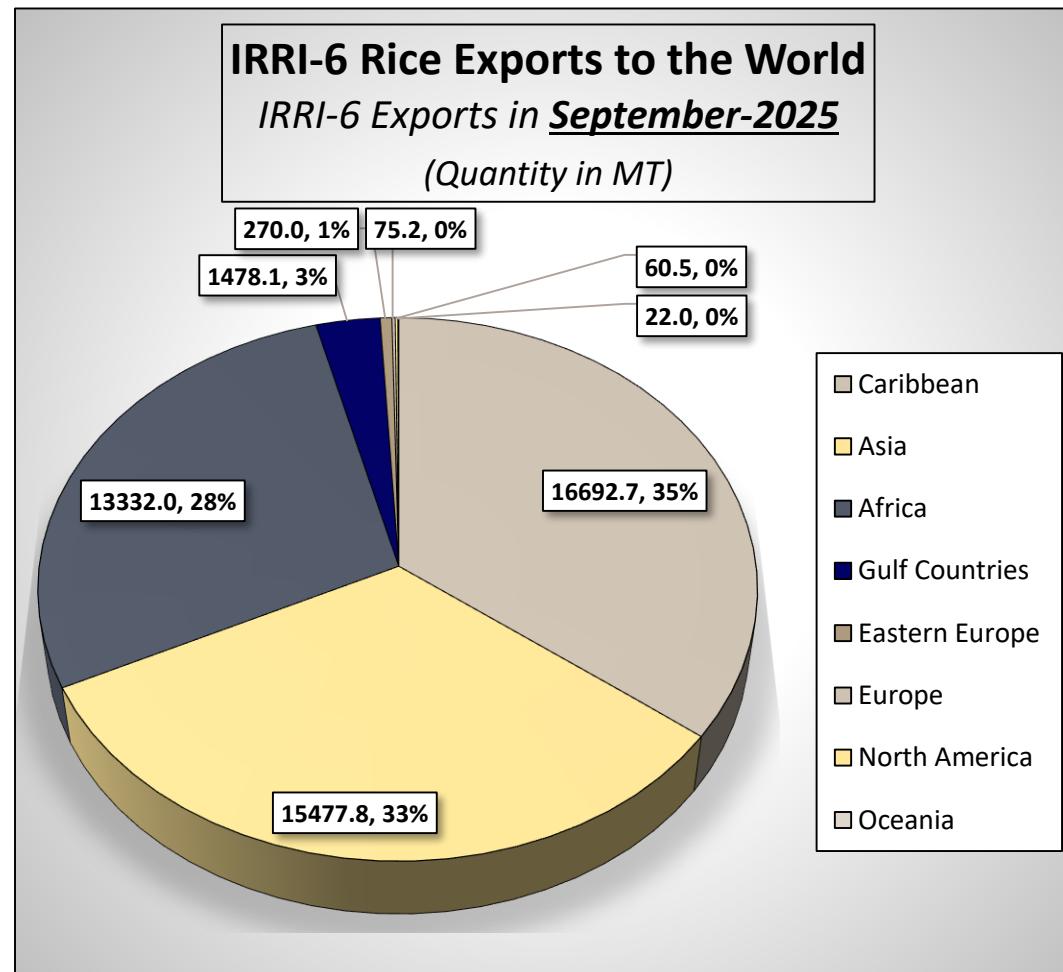
TRADITIONAL NON- BASMATI IMPORT MARKETS

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

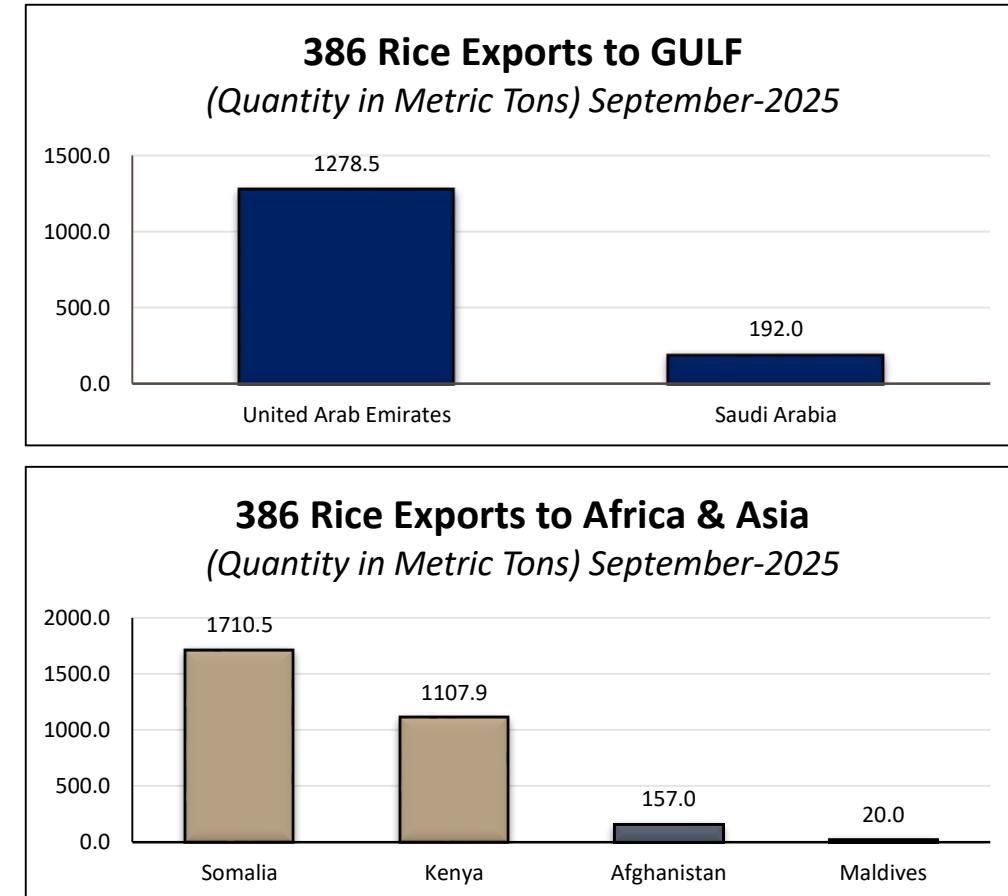
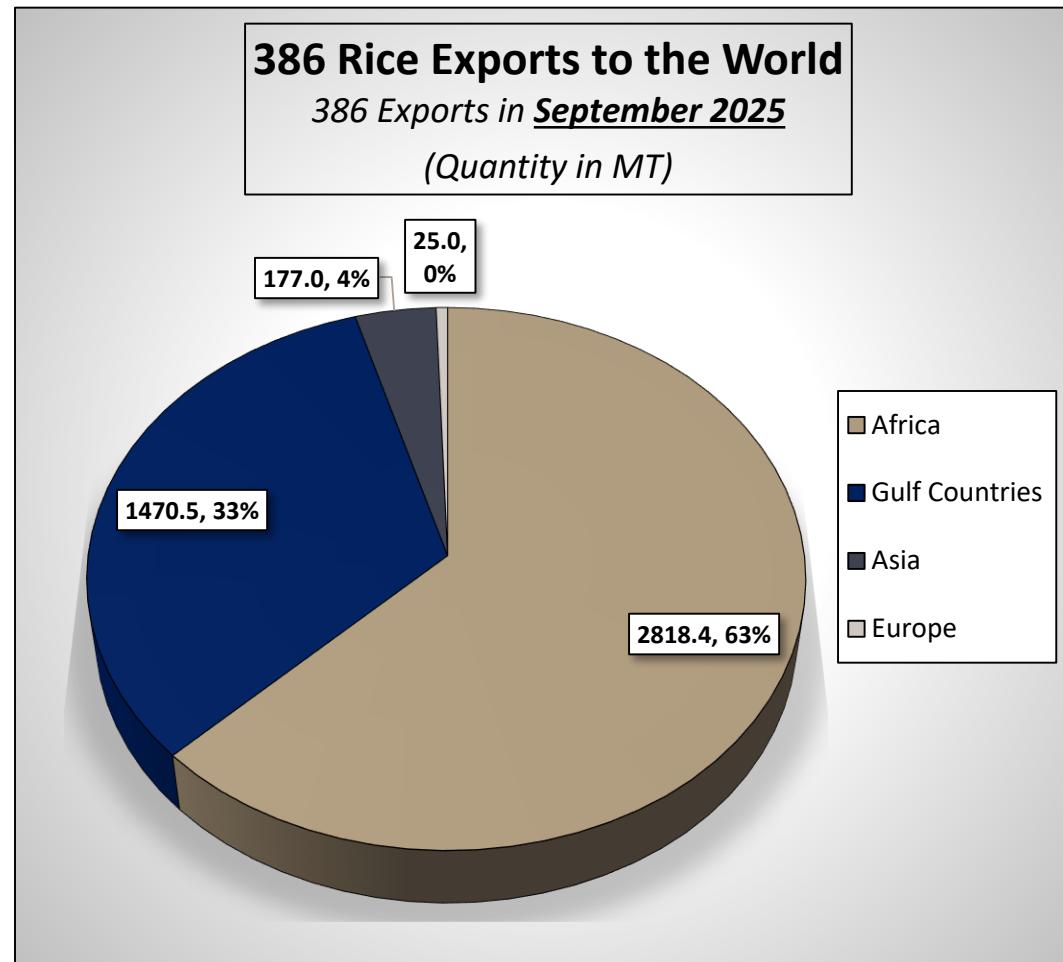
Region	Country	Key Highlights
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025 ; imports include parboiled and white rice
Southeast Asia	Indonesia	Govt. tenders led to ~61,000 MT import in 2024 ; continued interest in 2025
	Philippines	Philippines' import liberalization has opened new demand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



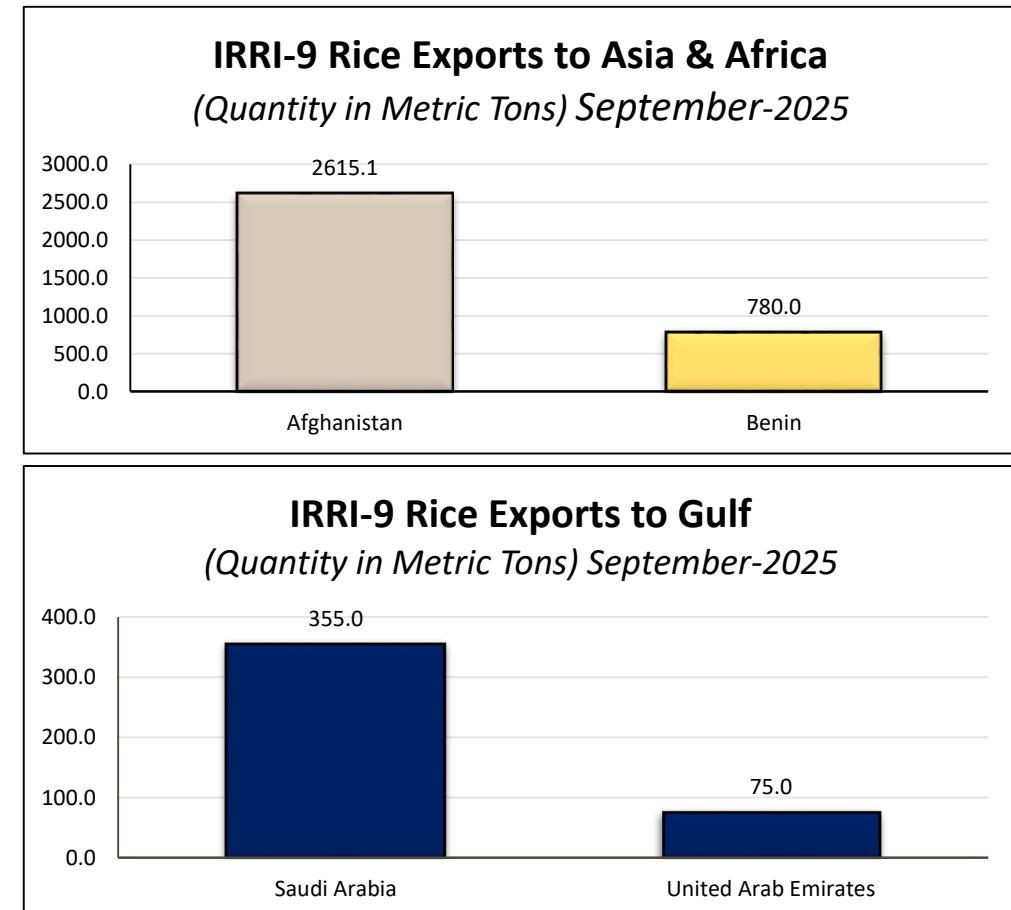
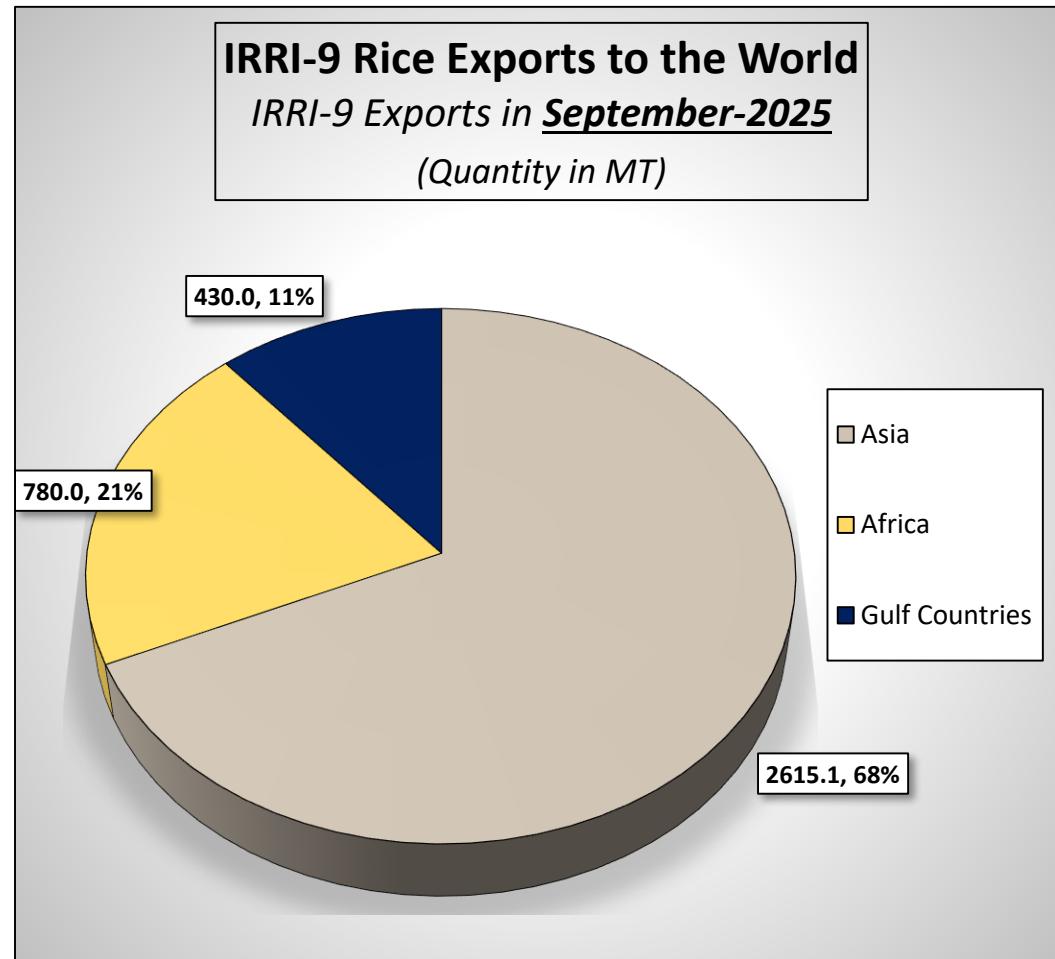
"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

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

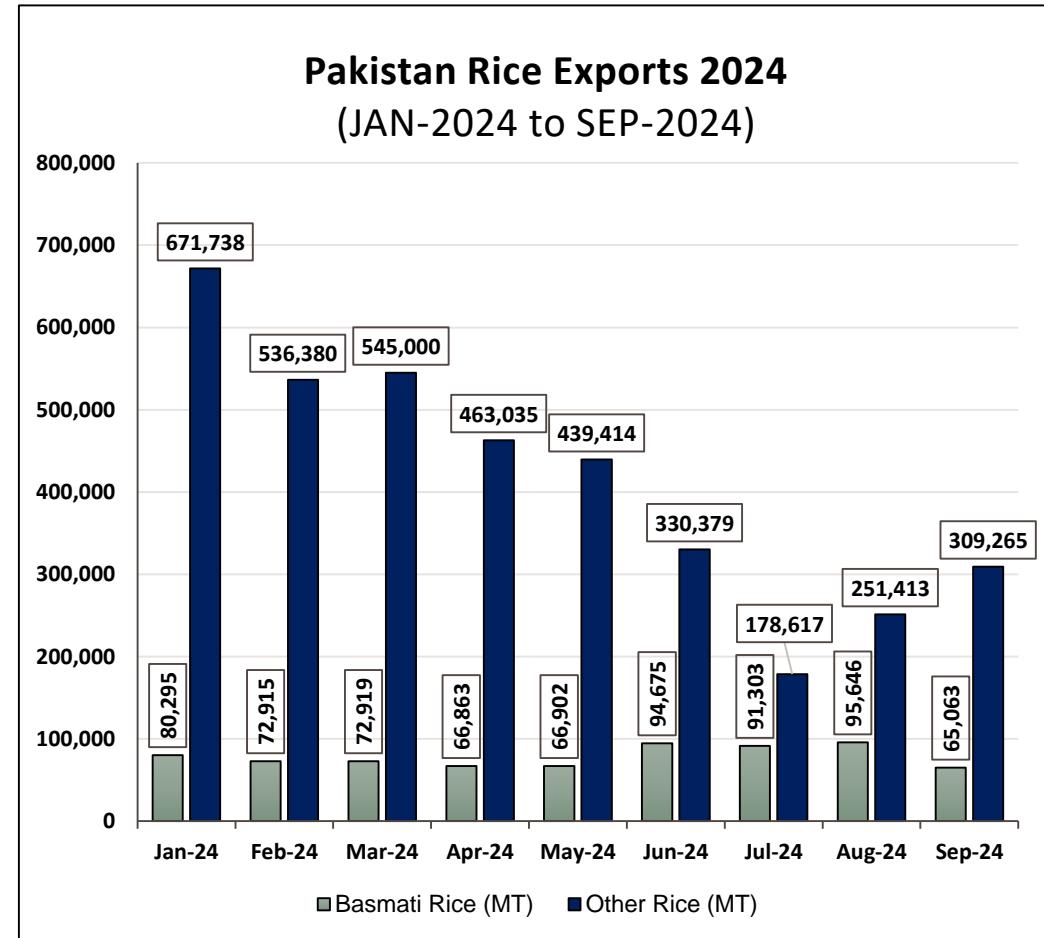
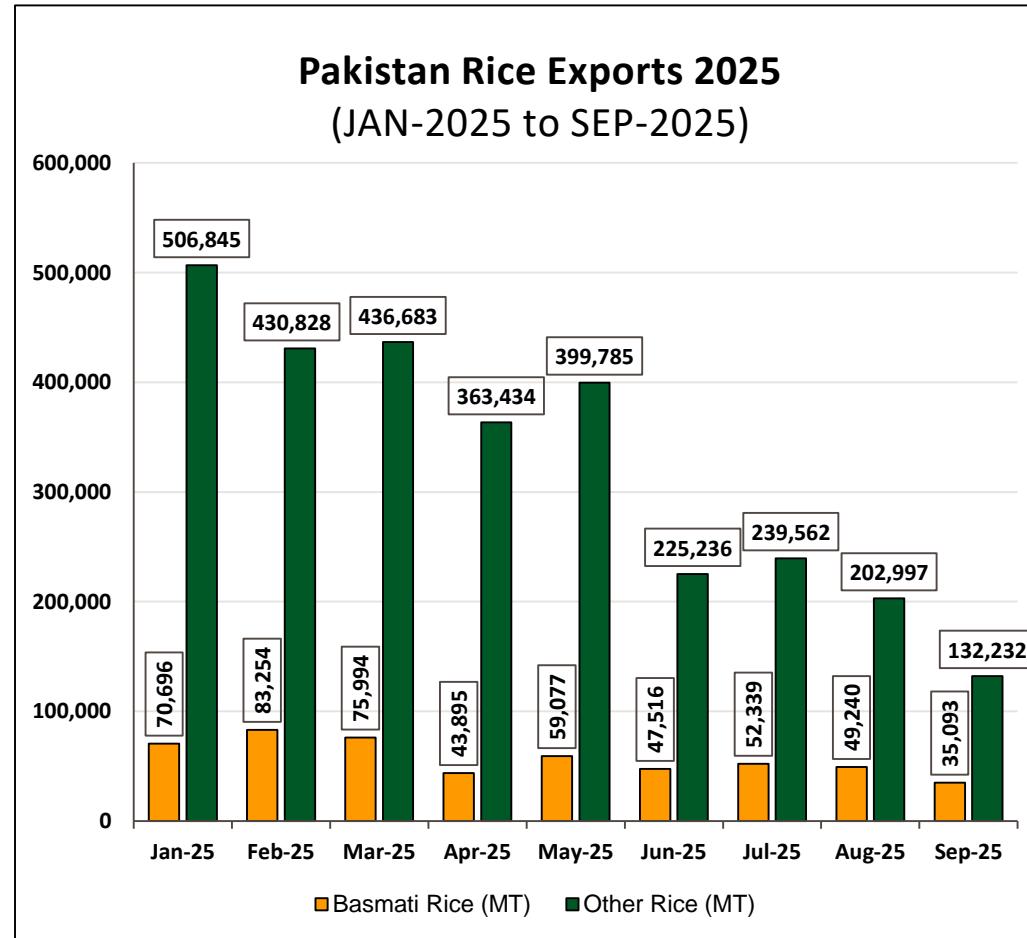


APPROVED BASMATI VARIETIES	
Basmati -370	Kissan Basmati
Basmati C 622	NIAB Basmati 2016
Sultan Super Basmati	Noor Basmati
Basmati 198	Super Gold
Basmati 385	Super Basmati 2019
Super Basmati	NIBGE Basmati 2020
Basmati 2000	PK 2021 aromatic
Shaheen Basmati	KSK 111 H
Basmati 515	Sona Super Basmati
PK IRRI-6 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
SKS- 282	NIBGE GSR 8
SKS- 133	SKCB – 370-5-32
NIAB IRRI-9	
NIAB 2013	
SKS- 434	
NIBGE -5	
NIAB ST-9	
NIAB IRRI – 195	
SKS- 706	
NIBGE GSR 6	
NIBGE GSR 7	

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

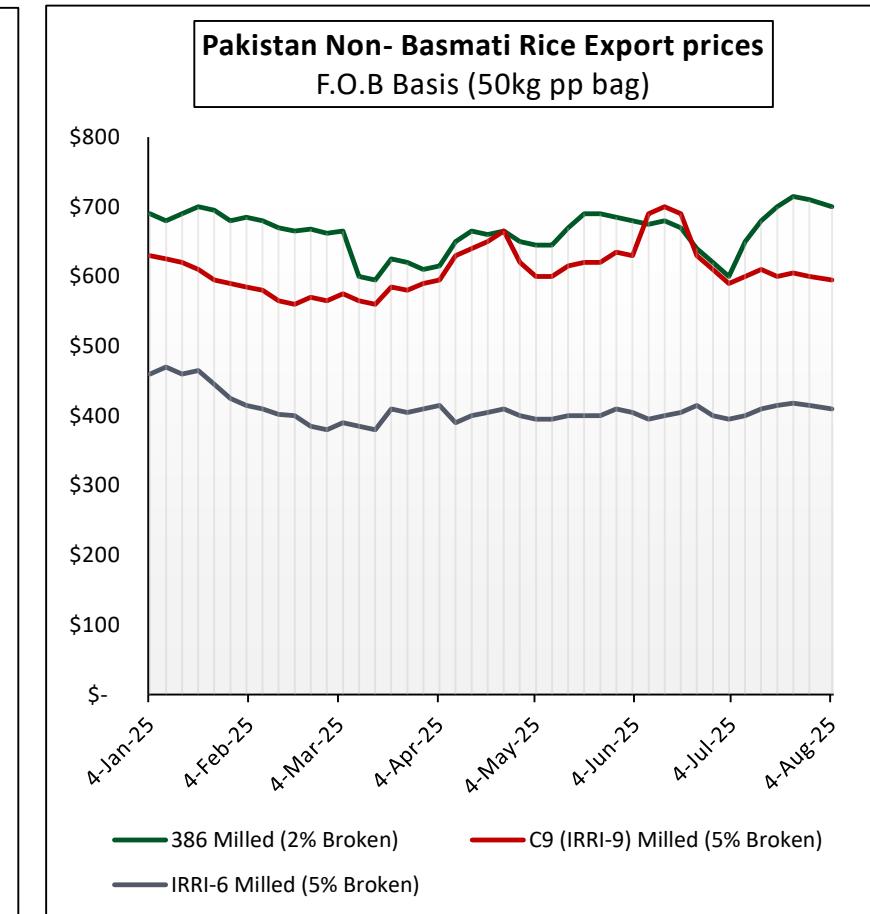
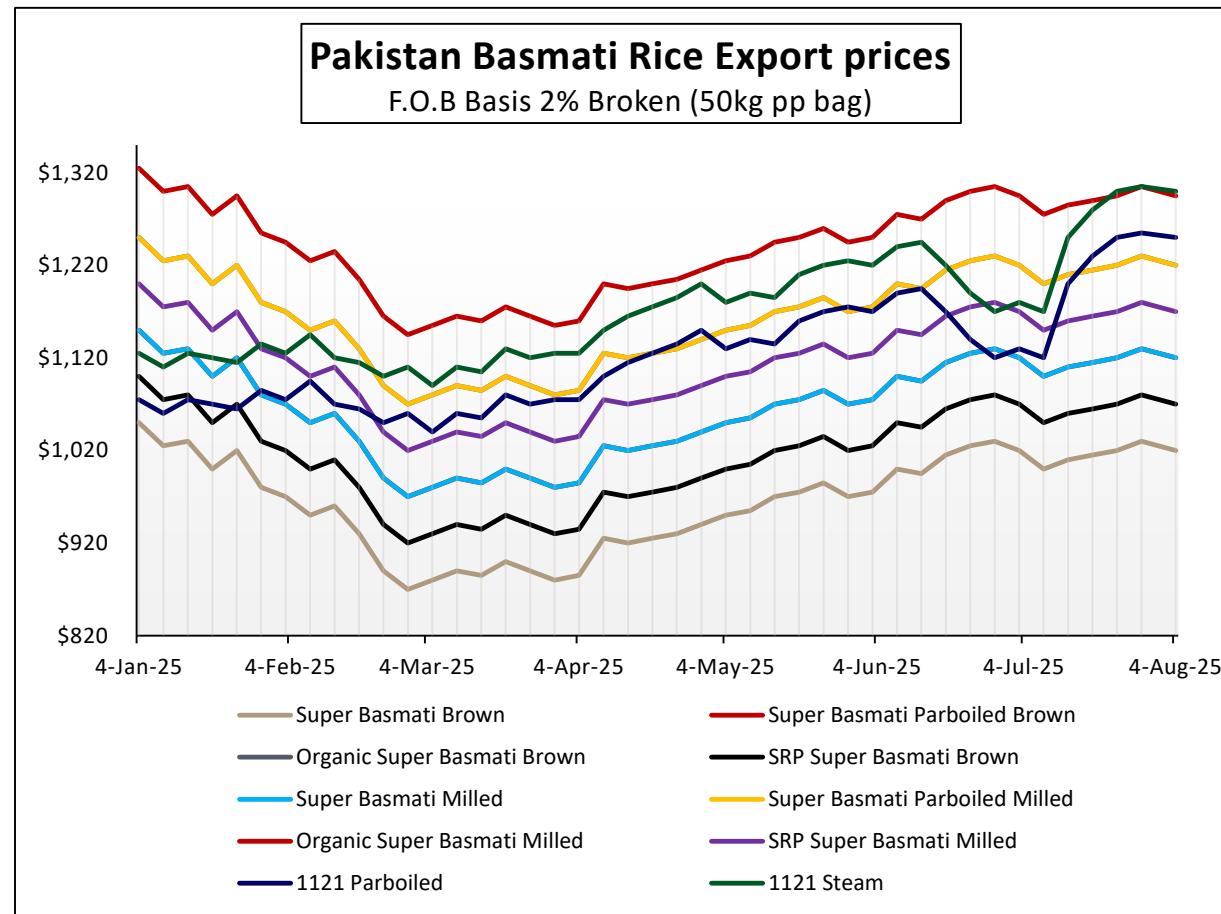
PAKISTAN RICE EXPORTS COMPARISON: (2024 & 2025)



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), Updates on **new season (2025-26)** FOB prices will be shared in the coming weeks.

Last Updated: 4August 2025, For more details on Pakistan market rice prices Please click here: [Pakistan Rice Market](#)

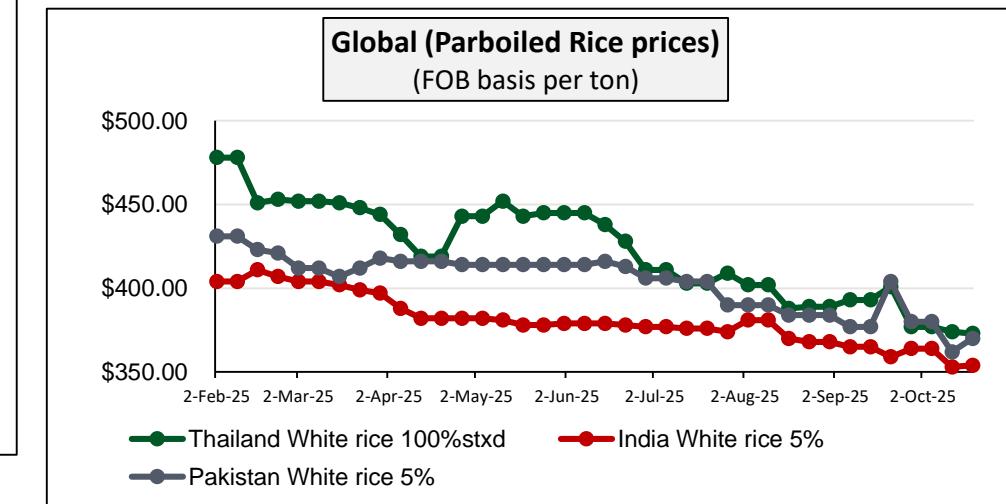
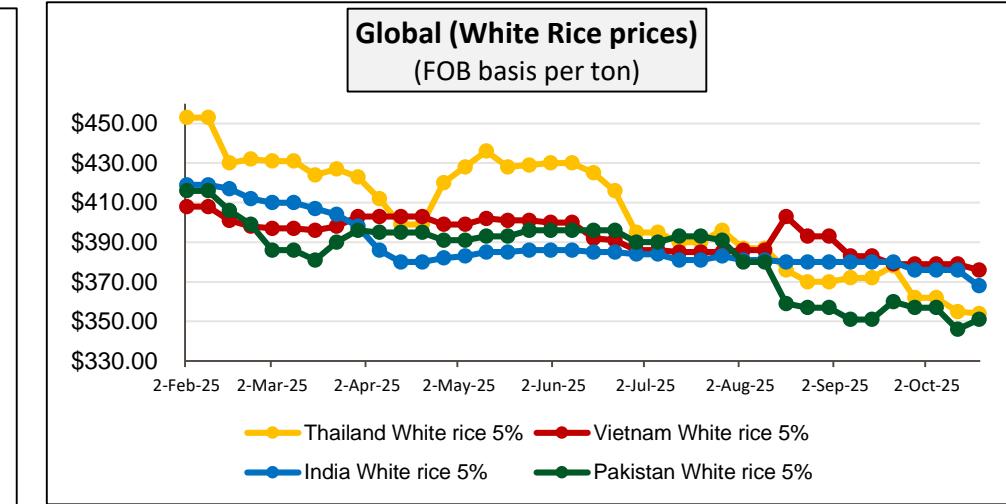
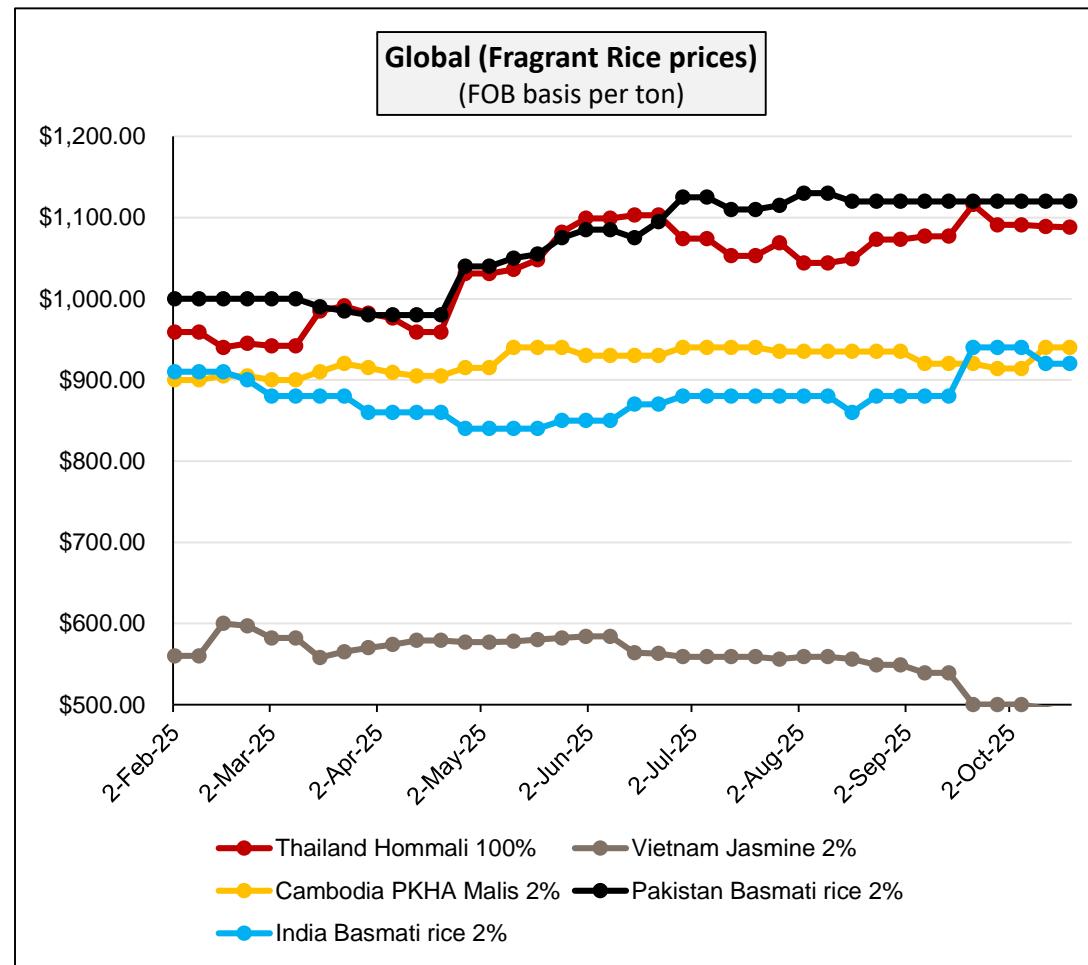
PAKISTAN RICE SECTOR – Key highlights of (October 2025)

- **REAP targets stronger rice exports to Saudi Arabia and Iran** - The **Rice Exporters Association of Pakistan (REAP)** aims to raise **rice exports to 180,000 metric tons** for **Saudi Arabia**, up from **110,000 tons** last year, following successful negotiations with Saudi importers. The body is also pursuing expansion in **Iran**, seeking to grow **Pakistan's share from 30% to 70%** through new trade channels and improved SPS compliance. Despite widespread floods in Sindh, REAP estimates only a **10% crop loss**, supported by a **20% rise** in cultivation area driven by hybrid seed adoption and better field management. (2 Oct 2025)
- **Pakistan gains price advantage over India in non-Basmati segment** - Pakistani non-Basmati rice is being offered at **USD 320–325/ton FOB**, significantly lower than **India's USD 366/ton**, giving Pakistani exporters an edge in African and Southeast Asian markets. The advantage stems from a weaker rupee, reduced logistics costs, and increased exportable surplus after strong paddy arrivals. Meanwhile, India's export target has been trimmed to 15 million tons as demand softens from traditional buyers. (8 Oct 2025)
- **Sharp drop in exports during Q1 FY26 amid floods and logistics issues** - Pakistan's **rice exports plunged 42%** year-on-year in the first quarter of FY2025–26, with **Basmati down 43.6%** and **non-Basmati (IRRI-6 & 9) down 41.1%**. Exporters cite flood-related disruptions, late shipments, and weak buying from Africa and the Middle East. In September 2025 alone, exports dropped **59% YoY**, contributing to a widening **USD 9.4 billion** trade deficit for the quarter. The government is reviewing export incentives to stabilize the sector. (16 Oct 2025)
- **REAP expresses concern over exclusion from NAFSA Board** - The Rice Exporters Association of Pakistan has lodged a strong protest after being excluded from the **National Food Security & Agriculture Board (NAFSA)**, despite a Prime Minister's directive to include it. REAP represents a major share of Pakistan's USD 8 billion plant-based exports, with rice alone contributing **USD 3.5 billion**. The association warns that excluding exporters from key policymaking forums could hurt progress on SPS compliance, export certification, and market access initiatives. (20 Oct 2025)
- **Pakistan's rice exports to China surge 63% YoY** - In a major positive development, Pakistan's rice exports to China increased by 63% year-on-year during Q3 2025, reaching **USD 45.27 million** (76.36 million kg) compared with **USD 27.85 million a year earlier**. Growth was driven by stronger demand for semi-milled and wholly-milled rice, supported by quality improvements and enhanced bilateral trade cooperation under the China-Pakistan Economic Corridor (CPEC) framework. (24 Oct 2025)

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](#)

Source: TREA (Thai Rice Exporters Association)

Major Highlight – Paddy Price Crisis 2025: Sindh Farmers in Distress



- **Harvest turns to protest** – As paddy harvesting began across Lower Sindh, farmers blocked roads and mills, decrying unjustified “moisture” deductions and rigged weighing scales that record **32–35 kg as one maund**.
- **Overproduction, underpayment** – Sindh’s rice acreage hit a **record 2.1 million acres (851,300 ha)**, yet farm-gate prices crashed from **Rs 3,600 to Rs 2,000–2,200 per 40 kg**, barely half the export value.
- **Unregulated and unfair** – With no support price, no certified moisture testing, and no scale inspections, millers allegedly form cartels—dictating prices unchecked by Agriculture or Weights & Measures departments.
- **Farmers shortchanged** – Even with acceptable **moisture (12–14%)**, growers face deductions of **4–5 kg per maund**, losing thousands across large harvests; millers profit from by-products like husk and bran.
- **Cartel and control** – Around **293 rice mills dominate Sindh’s procurement network**, fixing rates and controlling supply chains while smallholders struggle to cover rising diesel, labour, and fertiliser costs.
- **Mounting frustration** – Wheat and sugarcane growers earlier suffered similar neglect; now rice farmers face rising input costs, debts, and shrinking returns—turning a bumper crop into a burden.
- **Cracks in confidence** – As protests spread across **Badin, Sujawal, Thatta, and Tando Mohammad Khan**, growers warn that without price transparency, many will shift to less water-intensive crops next season.
- **Calls for reform** – Growers demand standardized meters, weekly indicative prices, and district Rice Price & Quality Committees to set fair rates, certify scales, and curb exploitation.
- **Bottom line** – **Pakistan earns \$3.2 billion from rice exports**, yet Sindh’s smallholders get the smallest share. Until governance returns to the marketplace, every harvest will carry more protest than profit.

Source: News, Publications & Reports

MAJOR GLOBAL NEWS HIGHLIGHTS OF (October 2025):



- India is set to expand its rice exports by targeting **26 new markets**, including Indonesia, the Philippines, Vietnam, and the US, with potential trade worth **₹1.8 lakh crore**, as part of the Bharat International Rice Conference (BRIC) 2025 in Delhi on October 30–31. Over 3,000 farmers, 1,000 foreign buyers, and **2,500 exporters** will attend the event. India, producing **150 million tonnes** of rice in **2024–25** and **exporting 20.1 million tonnes** worth **\$12.95 billion**, aims to strengthen its share in markets currently led by Pakistan and Ireland.
- Meanwhile, **Basmati growers in Punjab** and Haryana face losses as prices dropped by up to **₹1,500 per quintal** due to cheaper grain from Uttar Pradesh and Madhya Pradesh, weak global demand, and high moisture content after rains. Payments from Iran remain pending, and higher US tariffs have added pressure. **Prices for PUSA 1509** are between **₹2,300–₹2,500 per quintal**, while **PUSA 1718** sells around **₹3,300**.
- Earlier, the government relaxed export rules for Europe, temporarily waiving inspection certificates for six months to reduce delays, costs, and logistical hurdles in rice shipments.

Source: News & Publications



- Bangladesh has issued **two new international tenders** to buy **100,000 tonnes** of **non-basmati rice** to strengthen supplies amid a **15% rise in domestic prices**, despite a good harvest. The latest tenders each for **50,000 tonnes** close on **November 3 and 6**, with shipments required within 40 days. The move follows several recent government tenders aimed at stabilising prices for consumers struggling with persistent food inflation.
- On the same day, Dhaka also approved **imports of 1 lakh tonnes** of rice half from Myanmar and half from Dubai at a total cost of **Tk446.23 crore**. The deals include atap rice from Myanmar at **\$376.50 per tonne** and parboiled rice from Dubai at **\$355.99 per tonne**, reflecting the government's effort to boost reserves while maintaining steady domestic prices.
- Earlier, **rice imports surged** in the first two months of FY2025 as private traders took advantage of reduced import duties (2%) and cheaper Indian rice. Economists, however, warn that heavy reliance on imports may undermine local farmers' earnings during the upcoming Aman season.

Source: News & Publications

MAJOR GLOBAL NEWS HIGHLIGHTS OF (October 2025):



- Thailand's Rice Department is preparing measures to prevent paddy price declines during the **2025–26 harvest season** as farmers begin reaping crops from October to November. With good yields expected nationwide, authorities fear a market glut could depress prices. Plans include expanding purchase points with provincial mills, offering loan support through BAAC, and enabling farmers to store rice until prices improve. Around 428 cooperatives are expected to buy **4 million tonnes of paddy** to stabilise the market.
- Meanwhile, Thai rice prices have fallen to an **18-year low, with 5% broken rice trading at \$335–340 per tonne**, the weakest since 2007. Export demand from Asia and Africa remains sluggish, while the Thai Rice Exporters Association projects shipments of **7.5 million tonnes** this year though export value could drop 40%. Traders say buyers are waiting for prices to bottom out before making new deals.
- Thailand's rice exports also face risks after a **US–Japan trade deal** may cut its rice quota to **Japan from 300,000 tonnes to under 100,000 tonnes**. The agreement compels Japan to increase US rice imports by 75%, threatening Thailand's long-held share under the WTO framework. The Commerce Ministry is negotiating to preserve current quotas.

Source: News & Publications



- Vietnam remains Singapore's third-largest rice supplier, **exporting 87.8 million SGD (USD 67.5 million)** worth of rice in the **first nine months of 2025 — 25.3% of Singapore's total imports**. Although export value **dropped 11.5% year-on-year**, Vietnam ranked second in white rice and remained the top supplier of fragrant and glutinous rice, holding about 60% market share in both. A bilateral trade pact is under discussion to stabilise exports amid competition from **India and Thailand**.
- **Vietnam continues to strengthen** its role as a pillar of global food security, producing **34.8 million tonnes of rice** and **exporting over 7 million tonnes in the first nine months of 2025**. Deputy Minister Phung Duc Tien said biotech and gene-editing technologies are improving yields and **sustainability**, supported by new government policies to build a bio-industrial sector.
- Following the **Philippines' extended import suspension**, Vietnamese exporters are diversifying into African and Asian markets such as **Ghana, Côte d'Ivoire, and Malaysia**. The ban affects up to 40% of Vietnam's rice exports, forcing traders to find new buyers amid price declines and VAT refund delays.

Source: News & Publications

UPCOMING EVENTS:



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



2nd SS RICE NEWS CONVENTION 2025

The Annual Gathering for the Global Rice Trade

Date: November 12 – 14, 2025 GMT+7

Location: Muang Pattaya, Chang Wat Chon Buri, Thailand

Register here: <https://app.glueup.com/event/126673/register>



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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