

# RICE MARKET REPORT

Volume: 36

Dated: 11<sup>th</sup> December 2025.



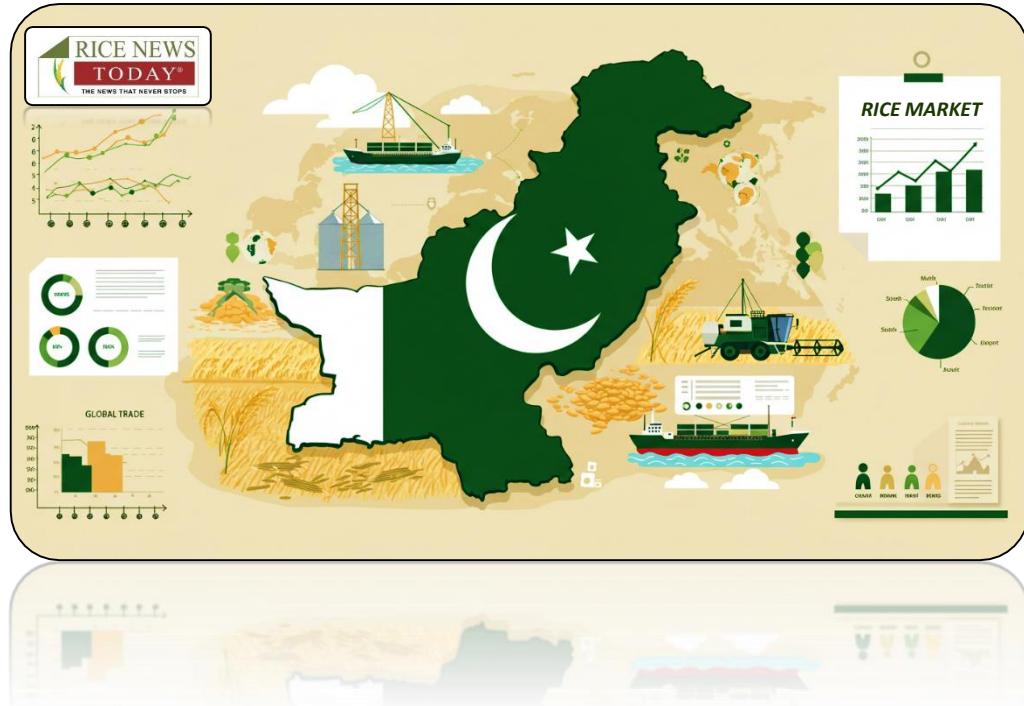
# CONTENT COVERED IN THIS REPORT:

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**).
2. Summary of all paddy rates.
3. Emerging Basmati Varieties for new season crop (**2025-26**).
4. Approved Rice Varieties of Pakistan.
5. Pakistan Rice News Highlights.
6. Rice Farming in Pakistan.
7. Pakistan Month-wise Exports.
8. Pakistan Export Prices (**Basmati & Non-Basmati**).
9. Global Rice Prices.
10. Major Update This Week
11. Global Rice News Highlights.
12. Global Rice Tender & Trade.
13. Upcoming Global Rice Events.

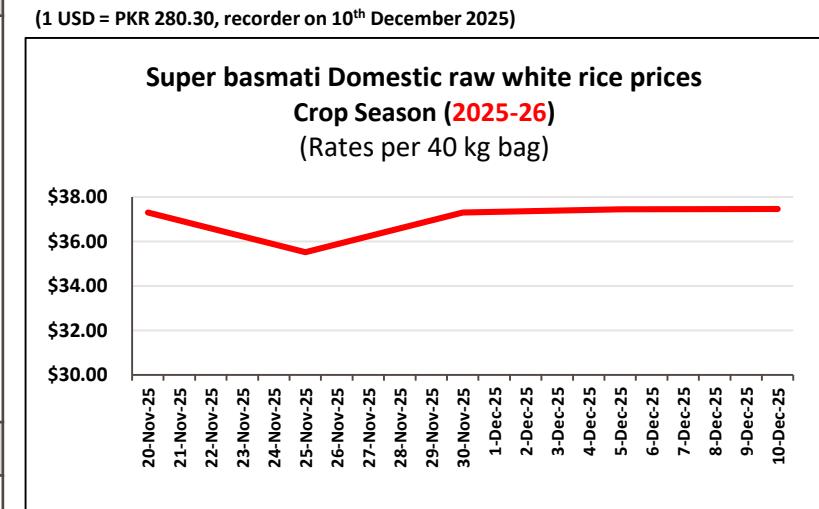
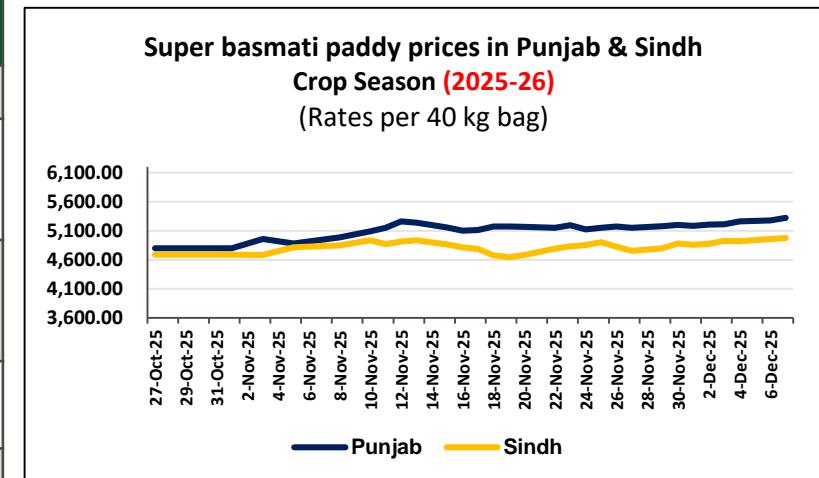


# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Basmati)

(Production, consumption, supply and Demand)



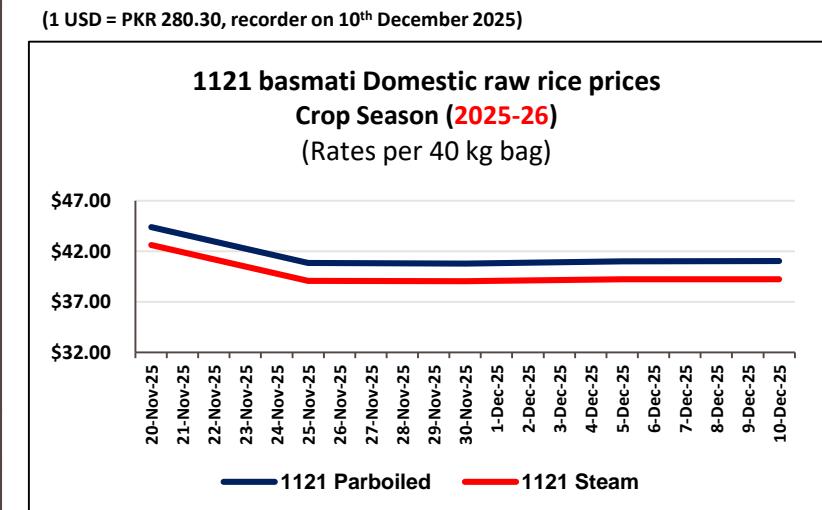
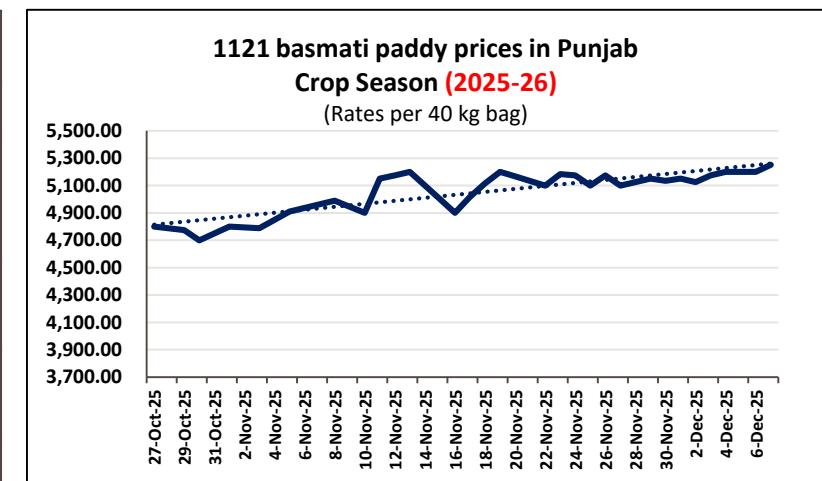
Super Basmati		
Growing Region	Punjab: Major quantity	Sindh: Relatively good quantity
Production Area	<b>Punjab:</b> 1% Decline in area <b>2025-26:</b> 13,00,000 Acres <b>2024-25:</b> 13,13,000 Acres	<b>Sindh:</b> N/A
Quality of the crop year (2025-26)	Good quality of the crop is being reported so far in various areas of Punjab.	Good quality of the crop is being reported so far in various areas of Sindh.
Variants Available	<ul style="list-style-type: none"> <li>Super basmati brown</li> <li>Super basmati milled</li> </ul>	<ul style="list-style-type: none"> <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>As per the market, The <b>Super Basmati market</b> remains stable, with <b>Pakistan</b> and <b>India holding firm FOB levels</b>, though <b>India</b> continues to offer cheaper rates. In <b>Punjab</b> and <b>Sindh</b>, paddy prices increased by <b>PKR 100 - 200 per 40 kg</b>, supported by abundant stocks, but overall market sentiment remains quiet. Activity is expected to improve as paddy arrivals near completion.</li> <li>The <b>EU market remains slow</b> due to the holiday season, while <b>Super Basmati brown rice</b> is currently offered at <b>USD 840 per ton</b>. The upcoming <b>Gulfood 2026</b> in January is <b>expected to create positive export opportunities</b>.</li> <li>Current super basmati paddy rates in Sindh are around <b>PKR 4,900–5,000 per 40 kg</b>, slightly increased with the last week level of paddy prices.</li> </ul>	
Local Consumption	Super basmati is consumed locally in a lower proportion.	
Competition	Pakistan: Super Basmati Milled: \$900 - 940 (FOB PER TON)	India: PUSA Basmati White: \$810- \$850 (FOB PER TON)



# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Basmati)

(Production, consumption, supply and Demand)

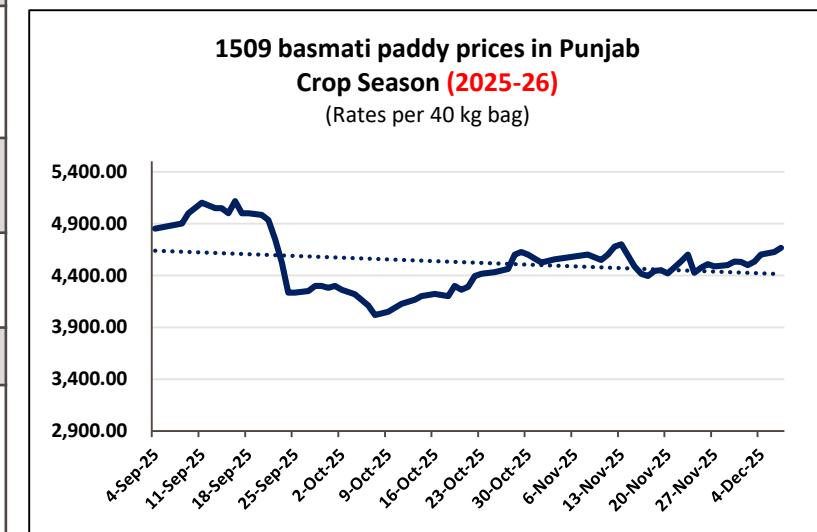
1121/Kainat Basmati		
<b>Growing Region</b>	<b>Punjab:</b> Major quantity	<b>Sindh:</b> Very low quantity
<b>Production Area</b>	<b>Punjab:</b> 9% Decline in area <b>2025-26:</b> 18,50,000 Acres <b>2024-25:</b> 20,17,000 Acres	<b>Sindh:</b> N/A
<b>Quality of the crop year (2025-26)</b>	Good quality of the crop is being reported so far in various areas of Punjab.	
<b>Variants Available</b>	<ul style="list-style-type: none"> <li>1121 basmati Parboiled</li> <li>1121 basmati Steam</li> <li>1121 basmati Milled</li> </ul>	
<b>Major Markets</b>	Europe, Gulf region and UK.	
<b>Supply and Demand</b>	<ul style="list-style-type: none"> <li>As per the market, <b>The 1121 Basmati segment</b> continues to face pricing pressure, primarily due to <b>cheaper Indian offers in international markets</b>. Although harvesting is nearly finished in Punjab, export demand remains soft. Stakeholders are cautiously optimistic regarding a <b>price recovery</b> in the coming weeks, supported by expected demand revival. The upcoming <b>Gulfood 2026</b> in January is <b>expected to create positive export opportunities</b>.</li> <li>Current paddy rates are hovering around <b>PKR 5,100–5,300 per 40 kg</b>, Slight increase than earlier paddy prices.</li> <li><b>1121 basmati Domestic raw rice prices</b> stand at <b>\$41.03</b> for 1121 parboiled rice and <b>\$39.24</b> for 1121 steam rice <b>(per 40 kg bag)</b>.</li> </ul>	
<b>Local Consumption</b>	1121 basmati rice is consumed locally	
<b>Competition</b>	<b>Pakistan:</b> 1121 Basmati Parboiled: <b>\$1100 - 1150</b> (FOB per ton)	<b>India:</b> 1121 Basmati Golden Sella: <b>\$980 to \$1050</b> (FOB per ton)



# MAJOR RICE VARIETIES GROWN IN PAKISTAN: (Basmati)

## (Production, consumption, supply and Demand)

1509/Kisan Basmati		
Growing Region	Punjab: Major Quantity	Sindh: Not available in Sindh
Production Area	<b>Punjab:</b> 10% Increase in area <b>2025-26:</b> 12,36,000 Acres <b>2024-25:</b> 11,08,000 Acres	<b>Sindh:</b> N/A
Quality of the crop year (2025-26)	Good quality of the crop is being reported so far in various areas of Punjab.	
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>As per the market, <b>1509 basmati</b> current paddy prices range between <b>PKR 4,500–4,700 per 40 kg</b>, compared to last week levels of <b>PKR 4,500–4,600 per 40 kg</b>, reflecting slight increase than earlier paddy prices.</li> <li>Additionally, exporters in Pakistan are clubbing new varieties such as <b>1847 and 1692 with 1509 Basmati</b>, as these variants are entering the market in good quantities. While it is still unclear whether they will form their own <b>export category in the future</b>, they are attracting growers due to better yield potential and improved grain quality.</li> </ul>	
Local Consumption	1509 basmati rice is consumed locally and also exported in some proportion.	

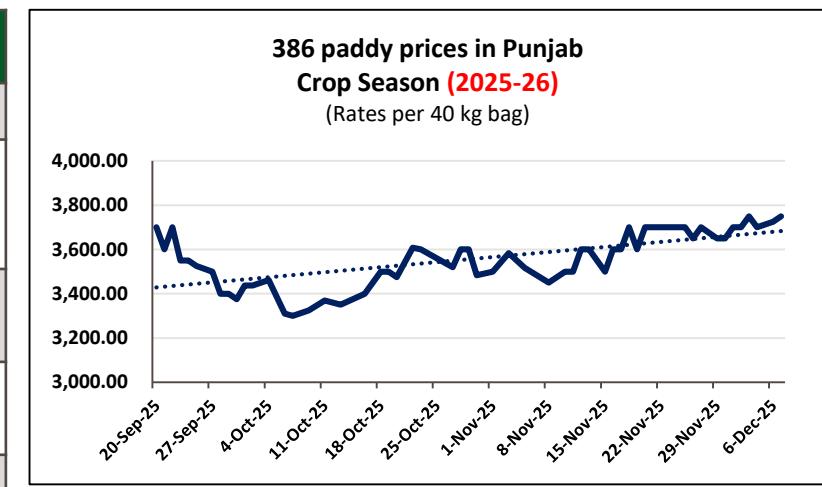


# MAJOR RICE VARITIES GROWN IN PAKISTAN: (Non-Basmati)

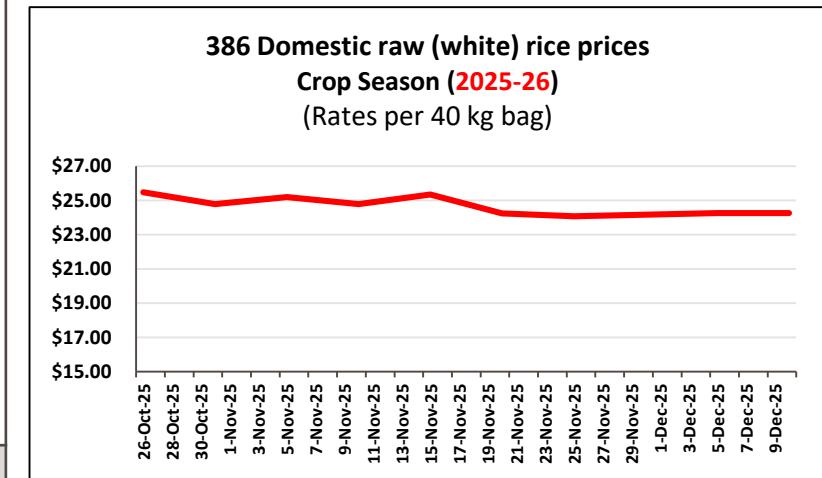
(Production, consumption, supply and Demand)



PK-386		
<b>Growing Region</b>	Punjab: Major Quantity	Sindh: Not available in Sindh
<b>Production Area</b>	<b>Punjab:</b> 147% Decline in area 2025-26: 1,79,000 Acres 2024-25: 4,43,000 Acres	Sindh: N/A
<b>Quality of the crop year (2025-26)</b>	Good quality of the crop is being reported so far in various areas of Punjab.	
<b>Variants Available</b>	<ul style="list-style-type: none"> <li>386 brown rice</li> <li>386 milled rice</li> <li>386 parboiled rice</li> </ul>	
<b>Major Markets</b>	African and Gulf countries.	
<b>Supply and Demand</b>	<ul style="list-style-type: none"> <li>The <b>PK 386 long-grain</b> segment remains under pressure amid <b>global oversupply</b> and <b>muted demand</b> from major markets. Import restrictions in the Philippines and reduced buying from Indonesia continue to weigh on prices. with <b>market activity</b> largely cautious as exporters navigate competitive pricing from regional suppliers.</li> <li><b>PK 386</b> paddy current rates are at <b>PKR 3,600–3,750 per 40 kg</b> reflecting slight increase from earlier paddy prices.</li> <li><b>PK 386</b> Domestic raw rice prices stand at <b>\$24.5–\$25.5 per 40 kg</b>, roughly <b>PKR 7,000–7,200</b>.</li> </ul>	
<b>Local Consumption</b>	386 rice is consumed locally.	



(1 USD = PKR 280.30, recorded on 10th December 2025)

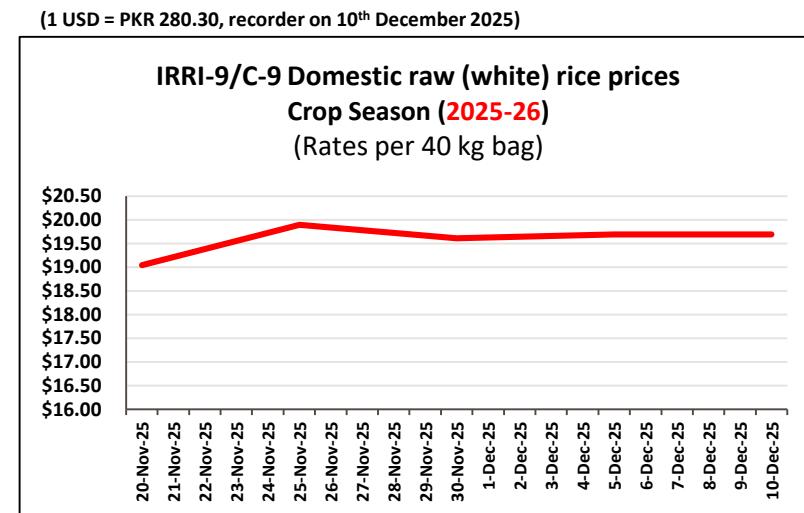
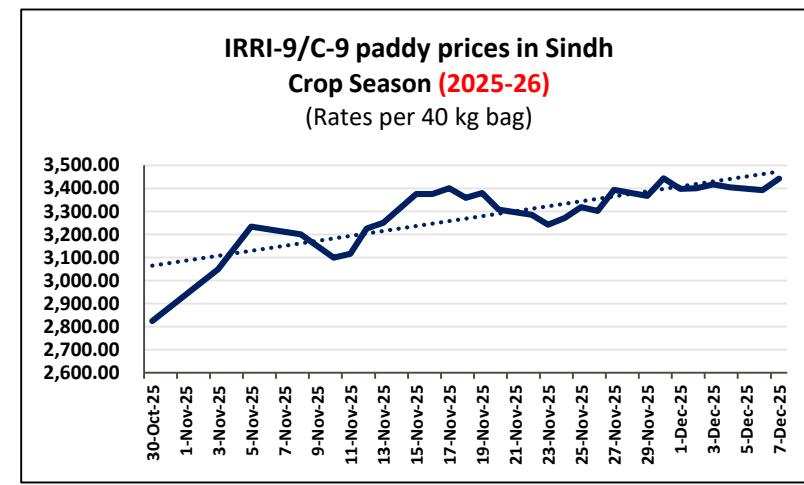


(1 USD = PKR 280.30, recorded on 10th December 2025)

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

(Production, consumption, supply and Demand)

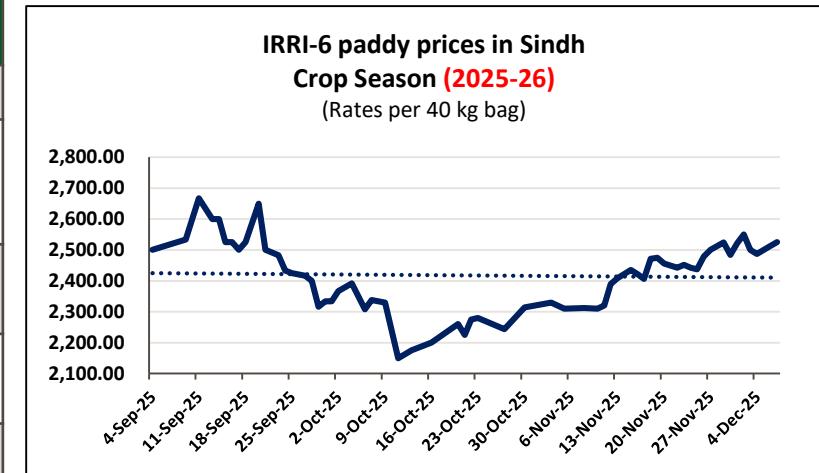
IRRI- 9		
<b>Growing Region</b>	Punjab: Lower Quantity.	Sindh: Major Quantity.
<b>Production Area</b>	Punjab: <b>108%</b> Decline in area 2025-26: 59,000 Acres 2024-25: 1,23,000 Acres	Sindh: N/A
<b>Quality of the crop year (2025-26)</b>	Good quality of the crop is being reported so far in various areas of Sindh.	
<b>Variants Available</b>	<ul style="list-style-type: none"> <li>IRRI-9 milled rice.</li> <li>IRRI-9 steam rice.</li> </ul>	<ul style="list-style-type: none"> <li>IRRI-9 parboiled rice</li> </ul>
<b>Major Markets</b>	Gulf & African countries.	
<b>Supply and Demand</b>	<ul style="list-style-type: none"> <li><b>IRRI-9</b> maintains a weak tone in line with <b>global long-grain trends</b>. Ample stocks in <b>Pakistan</b> combined with <b>limited buying interest</b> from <b>traditional markets</b> have led to slow movement. Despite slight improvement in local paddy prices, <b>export momentum</b> remains subdued as buyers assess regional price parity.</li> <li><b>Current paddy prices</b> stand at <b>PKR 3,300–3,450 per 40 kg.</b>, showing an upward trend from the last week level of paddy prices.</li> <li><b>Irri-9 Domestic raw rice prices</b> stand between <b>\$19 –\$19.6 per 40 kg bag</b>.</li> </ul>	
<b>Local Consumption</b>	IRRI-9 rice is consumed locally.	



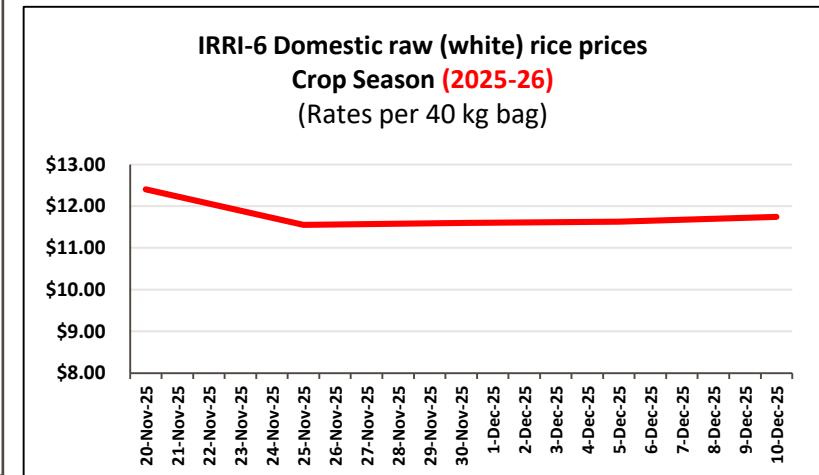
# MAJOR RICE VARIETIES GROWN IN PAKISTAN: (Non-Basmati)

(Production, consumption, supply and Demand)

IRRI- 6		
<b>Growing Region</b>	<b>Punjab:</b> Relatively good Quantity.	<b>Sindh:</b> Major Quantity.
<b>Production Area</b>	<b>Punjab:</b> 92% Decline in area 2025-26: 1,08,000 Acres 2024-25: 2,07,000 Acres	<b>Sindh:</b> N/A
<b>Quality of the crop year (2025-26)</b>	Good quality of the crop is being reported so far in various areas of Sindh.	
<b>Variants Available</b>	<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>	
<b>Major Markets</b>	Indonesia, Malaysia, Philippines and African countries.	
<b>Supply and Demand</b>	<ul style="list-style-type: none"> <li><b>IRRI-6 stocks</b> are abundant this season, with <b>feed mills actively purchasing</b> due to its lower price. Approximately <b>40–50% of IRRI-6 stocks remain to be sold</b>, though there is optimism that <b>Indonesia</b> may absorb some of the surplus. <b>Iran's buying activity</b> remains slow, and trade with <b>Afghanistan is impacted by border closures</b>, contributing to sluggish market movement. <b>Bangladesh's multiple tenders</b> and <b>Pakistan's TCP tender for 100,000 tonnes of IRRI-6</b> may provide temporary demand support.</li> <li>The <b>long-grain (LG) rice market</b> is also under pressure globally, and there are rumors that India may reconsider exports of <b>non-basmati rice</b> due to <b>domestic food security concerns</b>.</li> <li>The <b>IRRI-6 variety</b> current paddy prices ranging between <b>PKR 2,400–2,550 per 40 kg</b>, showing an upward trend.</li> </ul>	
<b>Local Consumption</b>	IRRI-6 rice is consumed locally.	

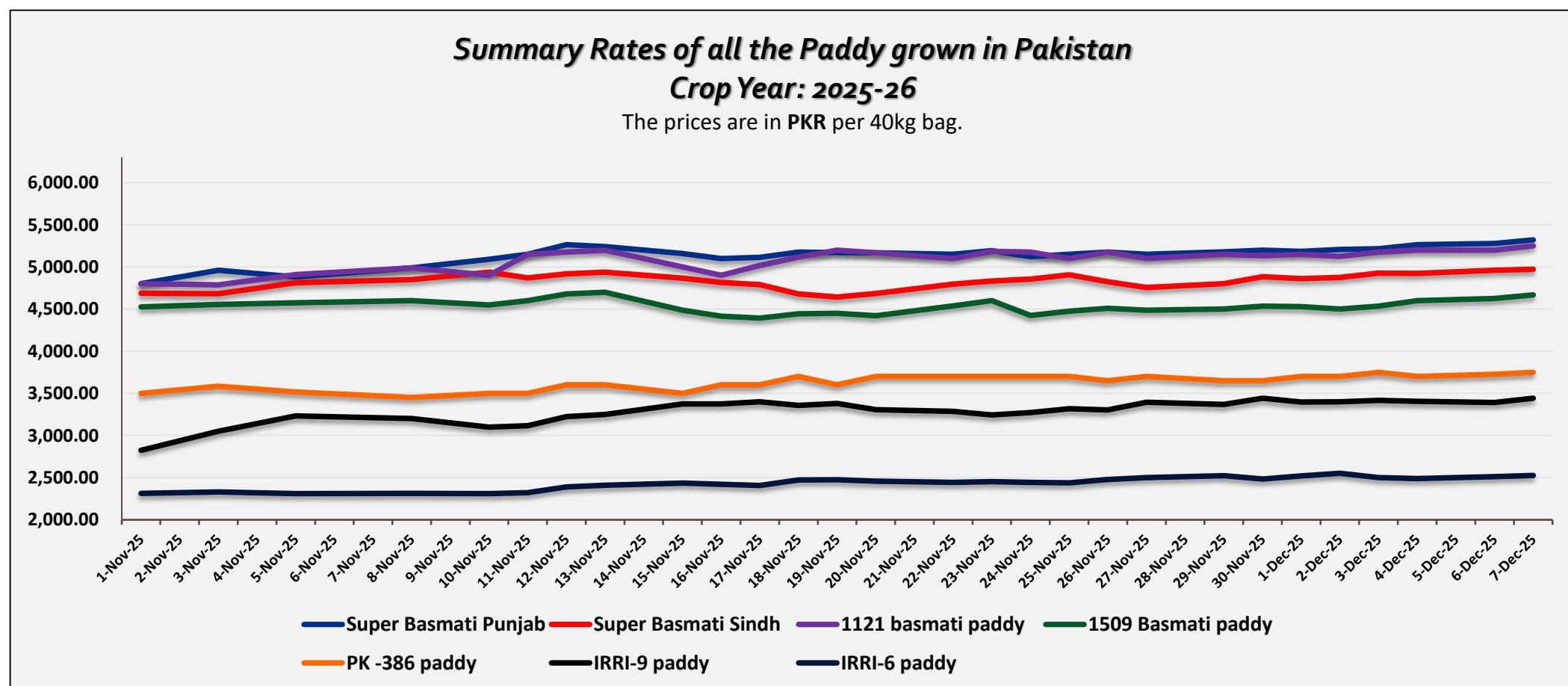


(1 USD = PKR 280.30, recorder on 10<sup>th</sup> December 2025)



(1 USD = PKR 280.30, recorder on 10<sup>th</sup> December 2025)

# 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: 7<sup>th</sup> December 2025)

For checking previous year rates and comparing various varieties please click here: [Pakistan Domestic Market](#)

# EMERGING BASMATI VARIETIES FOR NEW SEASON

## CROP: 2025–26

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### Key Emerging Basmati Varieties Observed This Season:

1. 1718
2. 1692
3. 1847
4. 1885
5. PB-07
6. Guard 101

Super Basmati	1121 Basmati	1509 Basmati
PB-07 (Clubbed with Super Basmati)	1718 (Clubbed with 1121 Basmati)	1847 Basmati (Clubbed with 1509 Basmati)
	1885 (Clubbed with 1121 Basmati)	1692 Basmati (Clubbed with 1509 Basmati)

- Exporters of Pakistan may club these new varieties with traditional Super, 1121, and 1509 Basmati. Although it is still unclear whether these varieties will form an individual export category, yet they are now arriving in the market in good quantities.
- These varieties are gaining attraction among growers due to certain agronomic benefits such as Improved yield potential & Better grain quality for export markets.

***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		APPROVED NON-BASMATI VARIETIES	
Basmati -370	Kissan Basmati	IRRI-6	IRRI-9
Basmati C 622	NIAB Basmati 2016	JKS- 282	NIBGE GSR 8
Sultan Super Basmati	Noor Basmati	JKS- 133	SKCB – 370-5-32
Basmati 198	Super Gold	NIAB IRRI-9	
Basmati 385	Super Basmati 2019	NIAB 2013	
Super Basmati	NIBGE Basmati 2020	JKS- 434	
Basmati 2000	PK 2021 aromatic	NIBGE -5	
Shaheen Basmati	JKS 111 H	NIAB ST-9	
Basmati 515	Sona Super Basmati	NIAB IRRI – 195	
PK 1121 aromatic	Vital Super Basmati	JKS- 706	
Punjab Basmati	NIAB HT 39	NIBGE GSR 6	
NIAB HT 18	NIAB S-39	NIBGE GSR 7	
GUARD 101	NIAB Super		
Chenab Basmati	NIAB Basmati-2016		

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

# PAKISTAN NEWS HIGHLIGHTS:

- The EU plans to curb rice imports from Pakistan under a safeguard mechanism with **tariff rate quotas, effective January 1, 2027**. **Pakistani exports**, which have grown fivefold since 2004, are mainly husked and milled rice. The move targets these key export segments, potentially affecting major suppliers. Experts say **Pakistan** should monitor the **India-EU FTA** and market developments closely, as such measures could act as barriers to exports. The situation may encourage exporters to consider processing rice within Europe to retain market access. [Read More](#) (7<sup>th</sup> Dec).
- **Pakistan** and **Iran** are advancing their **rice export agreements**, with purchase arrangements expected to be finalized soon. The discussions highlight Iran's interest in importing **high-quality Pakistani rice**, leveraging geographical proximity and cost advantages to strengthen bilateral agricultural trade. [Read More](#) (5<sup>th</sup> Dec).
- The **Rice Exporters Association of Pakistan (REAP)** has raised concerns **over declining rice exports**, warning that many exporters are operating at a loss due to rising taxes and policy uncertainty. **REAP Chairman Abdul Rahim Janoo** highlighted that exports, which had grown from **USD 300 million** to nearly **USD 4 billion** under the association's promotion, are now falling. The delegation urged attention to these challenges, as burdensome taxation and investor apprehension continue to impact the sector. [Read More](#) (03<sup>rd</sup> Dec).



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

- Total rice exports fell to **712,797 tonnes** in **Q1 FY26** from **991,146 tonnes** in **Q1 FY25**, a **28% decline**.
- Basmati rice exports fell to **137,066 tonnes** in **Q1 FY26** from **248,500 tonnes** last year, a **45.5% decline**.
- Non-basmati rice exports dropped to **575,731 tonnes** from **764,700 tonnes**, down **22.1%**.
- 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:

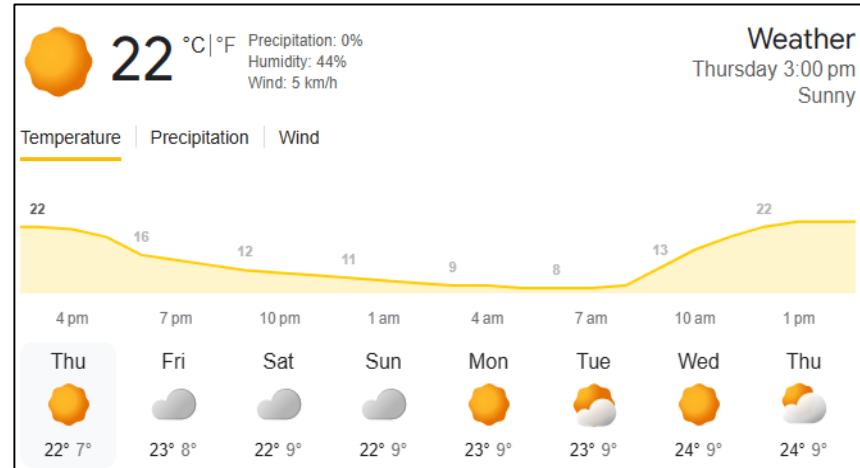
## Guard Unveils High-Yield OP Basmati Varieties for 2026 Season

- Pakistan's rice sector is set to receive a significant boost with the introduction of two new **Open-Pollinated (OP) Basmati varieties** by **Guard Agricultural Research & Services Ltd.** Named **Guard-101** and **Guard-102**, these varieties are poised for commercial cultivation in the **2026 crop season**. The journey of these varieties began years ago with extensive research, rigorous field trials, and genetic verification. After being formally registered with the **Punjab Seed Council in 2023**, the varieties progressed through pre-basic and basic seed stages. This year, Guard completed large-scale seed multiplication, producing **27 tonnes of Guard-101 and 59 tonnes of Guard-102** across carefully selected areas in Narang, Sheikhupura, and Manga Mandi, laying the groundwork for widespread adoption by farmers next year.
- According to **Guard's Chief Executive, Shahzad Ali Malik**, **Guard-101 and Guard-102** offer a yield potential of **50–55 maunds per acre**, with peak performance during trials reaching **60–65 maunds per acre**, putting them on par with renowned varieties like **Super Basmati 1121 and 1509**. Importantly, these varieties retain the traditional long grain, aromatic qualities, and cooking characteristics that define **Basmati rice**. **DNA verification conducted by Eurofins** confirmed their unique genetic identity, reinforcing Pakistan's commitment to varietal integrity in its **Basmati exports**. With their high yield potential, superior quality, and distinct genetic traits, **Guard-101 and Guard-102** are expected to enhance the competitiveness of Pakistan's rice sector, offering farmers new avenues for higher productivity and quality production, while strengthening the country's reputation as a global leader in premium Basmati rice. (8, December 2025)

Source: Publications & News



Source: AI



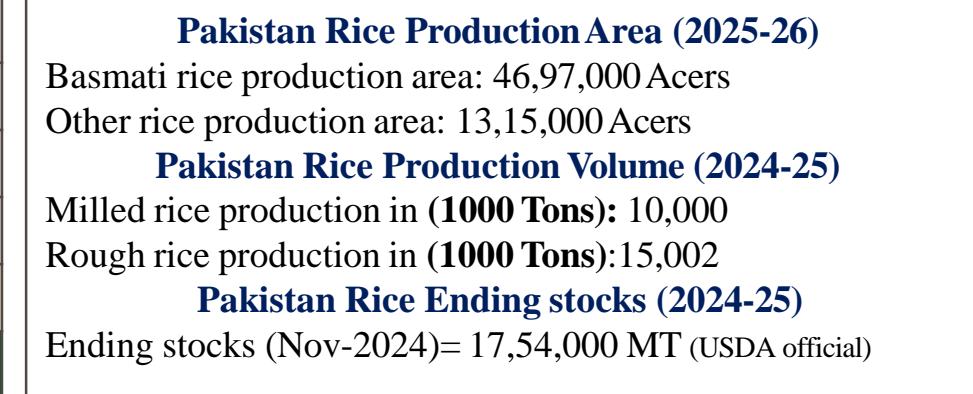
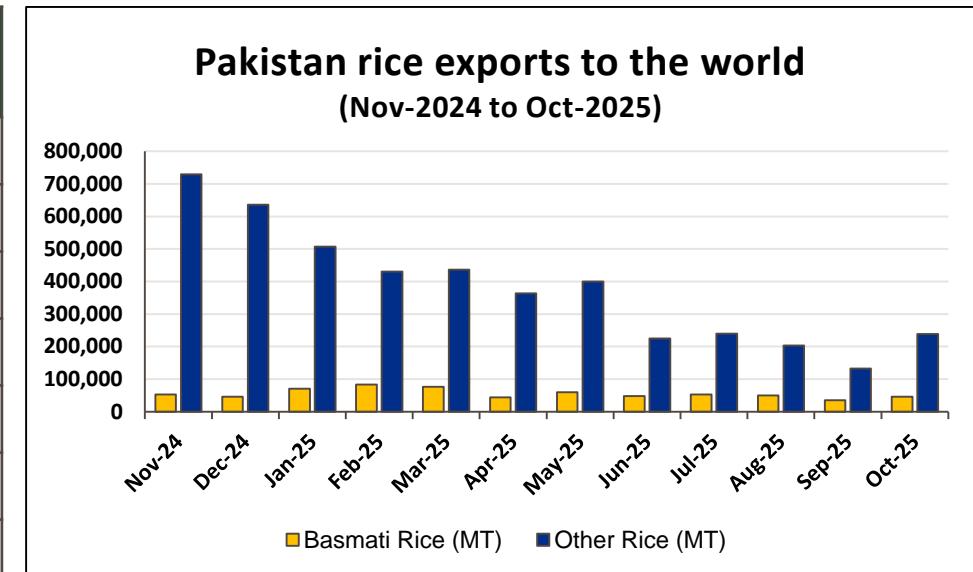
Source: Google Weather  
Weather forecast from 11<sup>th</sup> December and onward.

# 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) \$
Nov-24	52,918	\$54,299	728,964	\$377,072	<b>781,882</b>	<b>\$431,371</b>
Dec-24	46,160	\$47,699	636,055	\$312,085	<b>682,215</b>	<b>\$359,784</b>
Jan-25	70,696	\$77,782	506,845	\$241,270	<b>577,541</b>	<b>\$319,052</b>
Feb-25	83,254	\$88,368	430,828	\$200,595	<b>514,082</b>	<b>\$288,963</b>
Mar-25	75,994	\$77,002	436,683	\$197,333	<b>512,677</b>	<b>\$274,335</b>
Apr-25	43,895	\$45,741	363,434	\$160,555	<b>407,329</b>	<b>\$206,296</b>
May-25	59,077	\$59,226	399,785	\$180,025	<b>458,862</b>	<b>\$239,251</b>
Jun-25	47,516	\$48,635	225,236	\$101,172	<b>272,752</b>	<b>\$149,807</b>
Jul-25	52,339	\$55,760	239,562	\$112,350	<b>291,901</b>	<b>\$168,110</b>
Aug-25	49,240	\$51,534	202,997	\$94,744	<b>252,237</b>	<b>\$146,278</b>
Sep-25	35,093	\$41,094	132,232	\$63,213	<b>167,325</b>	<b>\$104,307</b>
Oct-25	45,725	\$54,038	238,544	\$108,623	<b>284,269</b>	<b>\$162,660</b>
<b>Total</b>	<b>661,908</b>	<b>\$701,177.43</b>	<b>4,541,165</b>	<b>\$ 2,149,036.91</b>	<b>5,203,073</b>	<b>\$2,850,214</b>

Source: Pakistan Bureau of statistics



Source: Punjab crop department & USDA

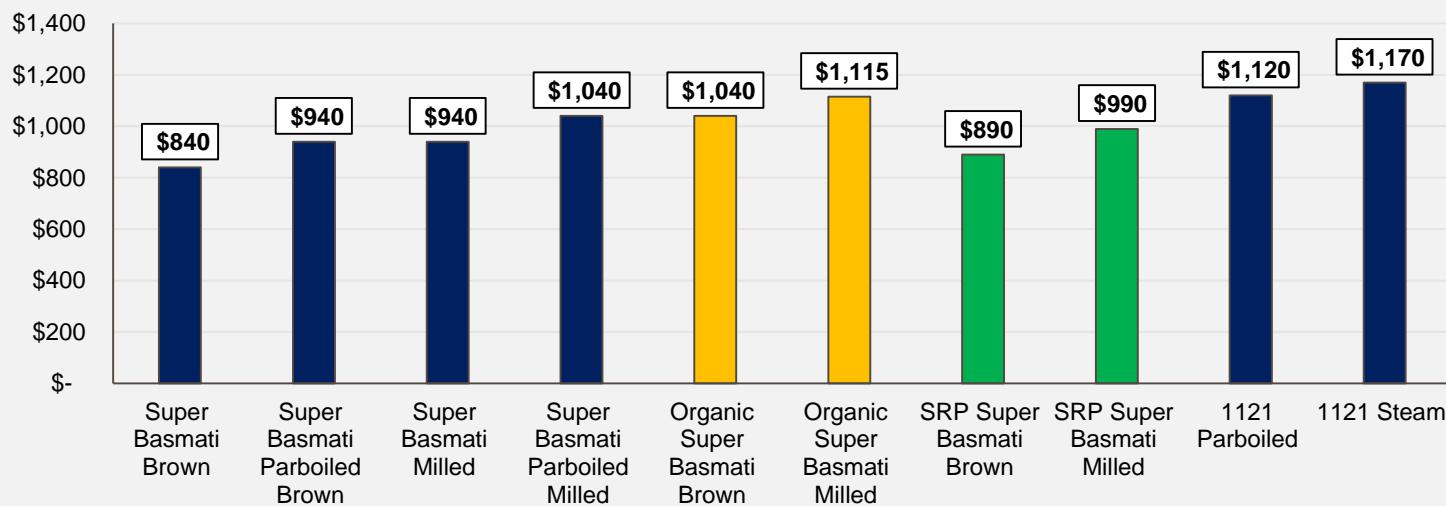
# PAKISTAN RICE PRICES:

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



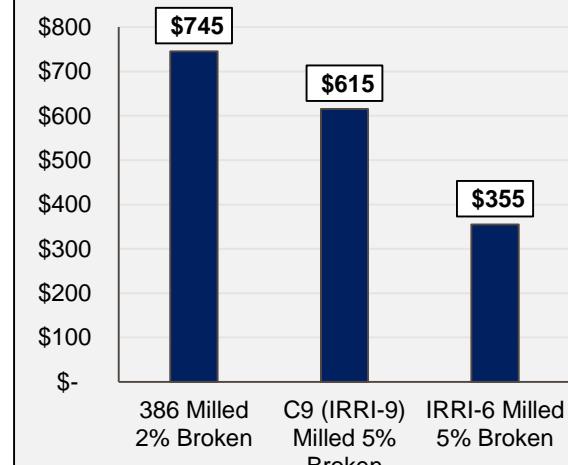
## Pakistan Basmati Rice Export prices

F.O.B Basis per ton 2% Broken (50kg pp bag)



## Pakistan Non- Basmati Rice Export prices

F.O.B Basis per ton (50kg pp bag)



All Rice Prices were updated on 10<sup>th</sup> December 2025.

This week, prices for all major rice varieties remained largely stable, with minor fluctuations of \$5–10/ton. **Super Basmati, 1121 Basmati (parboiled and steam), non-Basmati Long Grain - 386, and IRRI-6** white rice all saw only slight movements, reflecting a steady market.

For more details on Pakistan market rice prices Please click here: [Pakistan Rice Market](#)

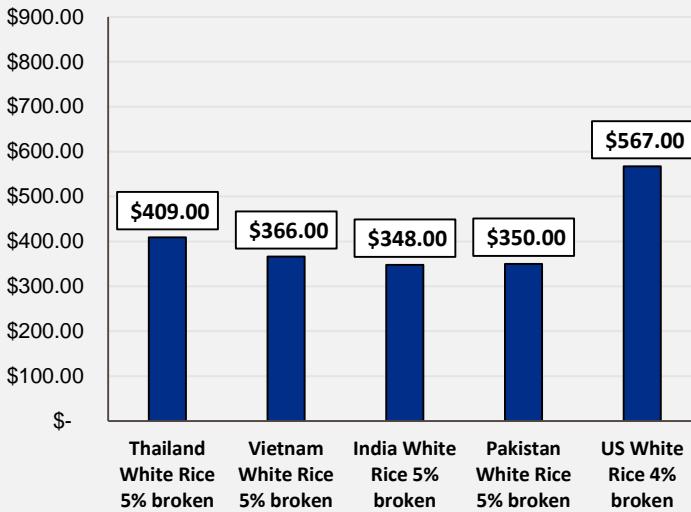
# GLOBAL RICE PRICES:

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



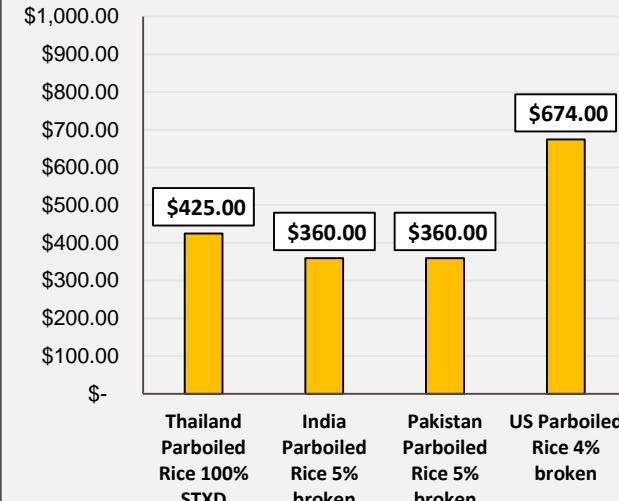
## Global White (Milled) Rice Export Prices

F.O.B. Based per ton updated on 07-Dec,2025



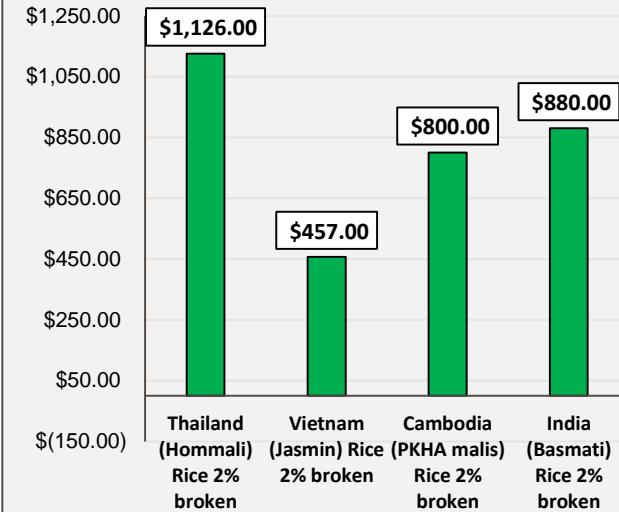
## Global (Parboiled) Rice Export Prices

F.O.B. Based per ton updated on 07-Dec,2025



## Global (Fragrant) Rice Export Prices

F.O.B. Based per ton updated on 07-Dec,2025



All Prices were updated on 07<sup>th</sup> December 2025.

- As per the news, **Global rice prices fell to multi-year lows in early 2025** due to rising supplies and uneven demand, with the FAO rice price index marking a fifth consecutive monthly decline. **India's premium Pusa Basmati** dropped from \$1,315/t in 2024 to \$906/t, while **Pakistan Basmati** eased to \$1,020/t. **Non-basmati Indian 25% broken rice** fell from \$422/t to \$362/t, whereas **Thai 5%** and premium **fragrant rice** remained stable at \$535–550/t and above \$1,000/t respectively. **Vietnam** maintained firm prices on strong China and Philippines demand, while US and South American exporters held higher premiums at \$536–647/t. Overall, premium aromatics are declining, mid-grade Asian rice stays competitive, and Western Hemisphere prices remain steady. [Read More](#)

Source: TREA (Thailand Rice Exporters Association), For more details on global rice prices Please click here: [Global Rice Market](#)

# MAJOR UPDATE THIS WEEK:

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## *Rice on the Trade Frontline: Trump Threatens Tariffs, India Responds*

- **U.S. Considers Tariffs on Indian Rice Amid Farmer Complaints** - U.S. President Donald Trump has threatened **new tariffs on Indian rice**, citing alleged “dumping” of cheap imports that undercut **American farmers**. During a White House meeting with farm representatives, Trump highlighted rice from India, Thailand, China, and even Puerto Rico, accusing them of selling below **market value**. The president linked these imports to the struggles of **U.S. farmers**, who have faced rising costs for **fertilizers, equipment, and labor**, and are projected to lose up to **\$43 billion this season**. To offset the losses, Trump unveiled **\$12 billion in aid for farmers**, funded in part by the very tariffs he is imposing.
- **India's Response and Export Realities** - India, the **world's largest rice exporter**, produces around **150 million tons annually**, exporting roughly **23 million tons** worldwide. In **FY 2024–25**, India exported **274,213 MT of Basmati rice (\$337.1M)** and **61,342 MT of non-Basmati rice (\$54.6M)** to the U.S., making the country the **4th largest market for Basmati** and **24th for non-Basmati**. The Indian Rice Exporters Federation (IREF) emphasized that exports are demand-driven, culturally specific, and not easily replaced by U.S.-grown rice, which lacks the aroma, texture, and flavor required for traditional South Asian dishes. Despite a **50% tariff increase**, Indian rice exports continue, with higher retail prices largely passed on to American consumers while Indian exporters' earnings remain stable.
- **Global Trade Context and Implications** - Trump's tariff threats come amid ongoing trade tensions and negotiations, including prior reciprocal tariffs on Indian goods and links to Russia oil purchases. These measures have **disrupted trade**, inflated **U.S. consumer prices**, and created uncertainty for exporters. The **U.S. trade team** is scheduled to visit New Delhi for negotiations, but repeated policy shifts from rice to fertilizers and **H-1B visas** have complicated talks. Indian authorities maintain that the **rice industry** is resilient and globally competitive, continuing to diversify markets beyond the U.S. to mitigate risk.
- **Impact on Farmers and Consumers** - The policy dilemma highlights the complex consequences of hasty trade decisions. While aimed at protecting **U.S. farmers**, tariffs have led to higher costs for consumers and no significant reduction in Indian exports. India can easily redirect rice to other markets or consume it domestically, whereas **U.S. buyers** face limited alternatives. This situation underscores how international trade policies, cultural food preferences, and global market dynamics intersect leaving ordinary people on both sides paying the price for political maneuvering.

# GLOBAL NEWS HIGHLIGHTS OF THIS WEEK:



**Vietnam's rice exports** have fallen sharply as the **Philippines its biggest buyer** tightened import rules, causing a drop in shipments and prices. Exporters warn **Vietnam** may struggle to sell a **4 million-ton** surplus from the upcoming harvest, with only **300,000 tons** expected to be allowed into the **Philippines** in January. Overall exports in **Jan–Nov 2025** fell to **7.51 million tons** worth **\$3.85 billion**, **down 11% in volume and 27.4% in value**, with **prices sliding 18.3% to \$512/ton**. [READ MORE](#) (11-Dec)



Myanmar exported **1.787 million tonnes** of rice worth about **\$575 million** in the first eight months of **FY 2025–26**, with monthly shipments ranging from **142,000** to **310,000 tonnes**. The country targets **3 million tonnes** of **rice exports** this fiscal year, after earning **\$1.129 billion** from **2.48 million tonnes** in **2024–25**. The Ministry of Commerce and trade bodies are coordinating to help meet monthly export goals. [READ MORE](#) (11-Dec)



The **USDA-FAS** lowered the **Philippines' 2025 rice import** forecast to **3.5 million MT** from **3.7 million MT** after the September import ban, with current imports at **3.34 million MT (81% from Vietnam)**. The country is still expected to be the world's top importer in 2026 with **5.5 million MT**. Local output is projected to drop 1% to **12.3 million MT**, while the DA cut its 2025 palay estimate to **19.61–19.89 million MT**. [READ MORE](#) (11-Dec)



Japan's retail **rice prices** hit a record high, with the average supermarket **price rising ¥23 to ¥4,335 per 5 kg**, the highest since March 2022. Brand rice increased to **¥4,551**, while blended rice jumped **¥92 to ¥3,870**, as **2025 crop supplies** entered the market. Additional surveys showed prices ranging from **¥3,835 at 1,200 supermarkets** to **¥4,315 across 6,000 retail stores**. [READ MORE](#) (07-Dec)



Cambodia exported **801,643 tons** of milled rice in **Jan–Nov 2025**, a **39% increase** from **575,562 tons** last year, earning **\$526.47 million in revenue**, up **27% year-on-year**. A total of **65 companies** shipped rice to **72 markets**, with fragrant rice making up **65.15% of exports**. China remained a key buyer, supported by RCEP and the **Cambodia-China FTA**. [READ MORE](#) (5-Dec)

# GLOBAL RICE TENDER & TRADE UPDATE:

## Bangladesh Steps Up Rice Imports: Multiple Tenders for 50,000 Tons of Non-Basmati Parboiled Rice to Stabilize Prices:

- Bangladesh will import **50,000 tons of non-basmati parboiled** rice from India at **Tk42.98/kg (around \$351.49/ton)**, costing a total of **Tk2.15 billion**. The purchase will be made through international competitive bidding, with **Nutriagro Overseas OPC Pvt Ltd** selected as the supplier. The decision was approved by the Cabinet Division, chaired by Finance Adviser **Dr. Salahuddin Ahmed**. *(11, December 2025)*
- **Bangladesh** has issued another **international tender** to buy **50,000 tons of non-basmati parboiled rice**, with price offers due December 22, as part of ongoing efforts to boost local supplies amid rising **domestic prices**. This follows multiple recent tenders, including two for **50,000 tons** each with offers submitted on **December 15** and earlier this week. The new tender requires **CIF liner out terms, bid validity until January 5**, and shipment to Chittagong or Mongla within 40 days, with all origins allowed except Israel. *(10, December 2025)*
- The **Bangladesh** government approved the procurement of **50,000 tonnes of non-Basmati parboiled rice** and **10,000 tonnes** of lentil to strengthen food reserves and stabilize prices. The rice, to be supplied by India's Nutriagro Overseas, will cost **Tk214.90 crore** under international tender. The lentils will be sourced locally from Joytun Auto Rice & Dal Mills for Tk72.35 crore. Officials said the move supports market stability and stock replenishment. *(10, December 2025)*
- **Bangladesh** has issued a fresh international tender to buy **50,000 tons of non-basmati parboiled rice**, with bids due December 15, following two earlier tenders this month and several in November. The government is ramping up imports to cool high **domestic prices** despite a good harvest. The tender requires **CIF liner out terms**, shipments to Chittagong or Mongla within 40 days, bid validity until **December 29**, and excludes sourcing from Israel. *(2, December 2025)*



## UPCOMING EVENTS:

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### 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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