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एपीडा
APEDA

# Monthly Dashboard – Rice

**HS code: 1006**

## June 2026

# Acreage and production trends

# Rice crop calendar of major producing countries

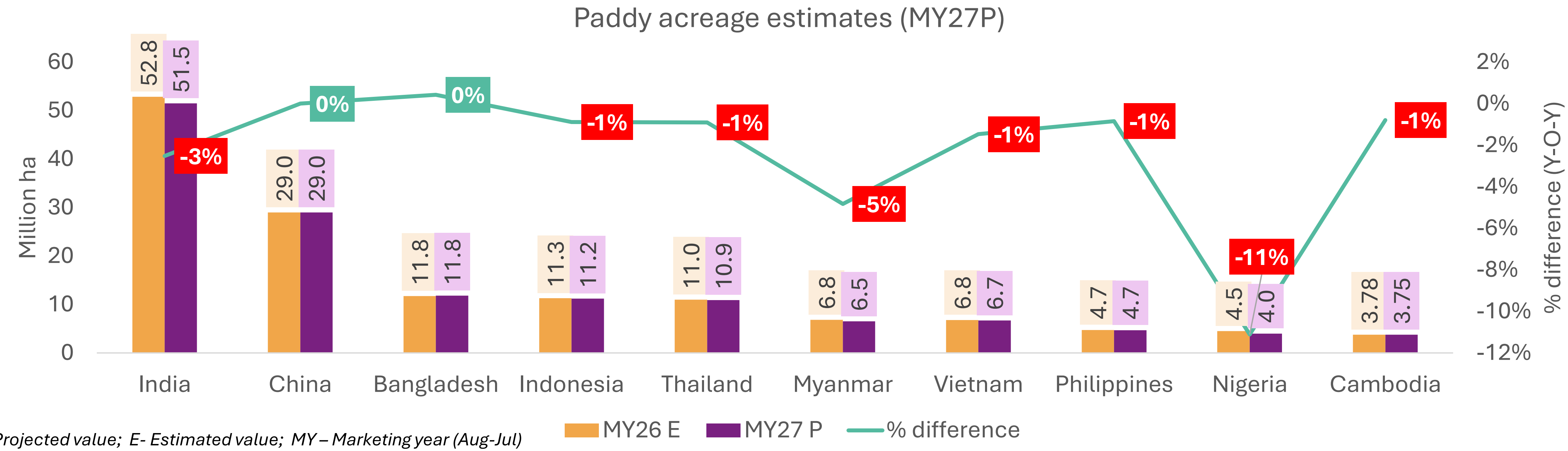
| Countries | Season | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | % of total production |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **India** | Kharif | | | | | Sowing | Sowing | Sowing | Sowing | Harvesting | Harvesting | Harvesting | Harvesting | 85% |
| | Rabi | Sowing | Sowing | Harvesting | Harvesting | Harvesting | | | | | | | Sowing | 15% |
| **China** | Early | | | Sowing | Sowing | | | | Harvesting | Harvesting | Harvesting | | | 72% |
| | Main | | | | Sowing | Sowing | | Harvesting | Harvesting | | | | | 15% |
| | Late | | | | | | Sowing | Sowing | | | Harvesting | Harvesting | | 13% |
| **Bangladesh** | Aman | | | | | | Sowing | Sowing | | | | Harvesting | Harvesting | 39% |
| | Aus | | | Sowing | Sowing | Sowing | | Harvesting | Harvesting | | | | | 8% |
| | Boro | Sowing | | | Harvesting | Harvesting | | | | | | Sowing | Sowing | 53% |
| **Indonesia** | Main | Harvesting | Harvesting | | | | | | | | Sowing | Sowing | | 45% |
| | Second | | Sowing | Sowing | Harvesting | Harvesting | | | | | | | | 32% |
| | Third | | | | | | Sowing | Sowing | | Harvesting | Harvesting | | | 23% |
| **Thailand** | Main (Wet) | | | | | Sowing | Sowing | | | | | Harvesting | Harvesting | 82% |
| | Second (Dry) | Sowing | Sowing | | | Harvesting | Harvesting | | | | | | | 18% |
| **Vietnam** | South winter spring | Sowing | Sowing | | Harvesting | Harvesting | | | | | | | Sowing | 26% |
| | North winter spring | Sowing | Sowing | Sowing | | | Harvesting | Harvesting | | | | Sowing | Sowing | 24% |
| | Summer Autumn early | | | Sowing | Sowing | Sowing | | | Harvesting | Harvesting | | | | 22% |
| | North winter Lua Mua | | | | | | Sowing | Sowing | | Harvesting | Harvesting | Harvesting | | 18% |
| | Summer Autumn late | | | | | | | Sowing | Sowing | | | Harvesting | Harvesting | 10% |
| **Philippines** | Main (Wet) | | | Sowing | Sowing | Sowing | | Harvesting | Harvesting | Harvesting | | | | 60% |
| | Second (Dry) | Harvesting | Harvesting | Harvesting | | | | | | Sowing | Sowing | Sowing | | 40% |
| **Burma** | Main season | | | | | | Sowing | Sowing | Sowing | | Harvesting | Harvesting | Harvesting | 83% |
| | Second (Dry) | Sowing | | | Harvesting | Harvesting | | | | | | | Sowing | 17% |
| **Pakistan** | Main | | | | | Sowing | Sowing | Sowing | | Harvesting | Harvesting | Harvesting | | 100% |
| **Cambodia** | Main (Wet) | | | | | Sowing | Sowing | | Harvesting | Harvesting | Harvesting | Harvesting | | 76% |
| | Second (Dry) | | Harvesting | Harvesting | Harvesting | | | | | | | Sowing | Sowing | 24% |

*Source: USDA*

Sowing | Harvesting

**Note:** *As per USDA,* ***Marketing year (MY)*** *for Rice is considered as (August - July)*

# Acreage estimates of major producing countries



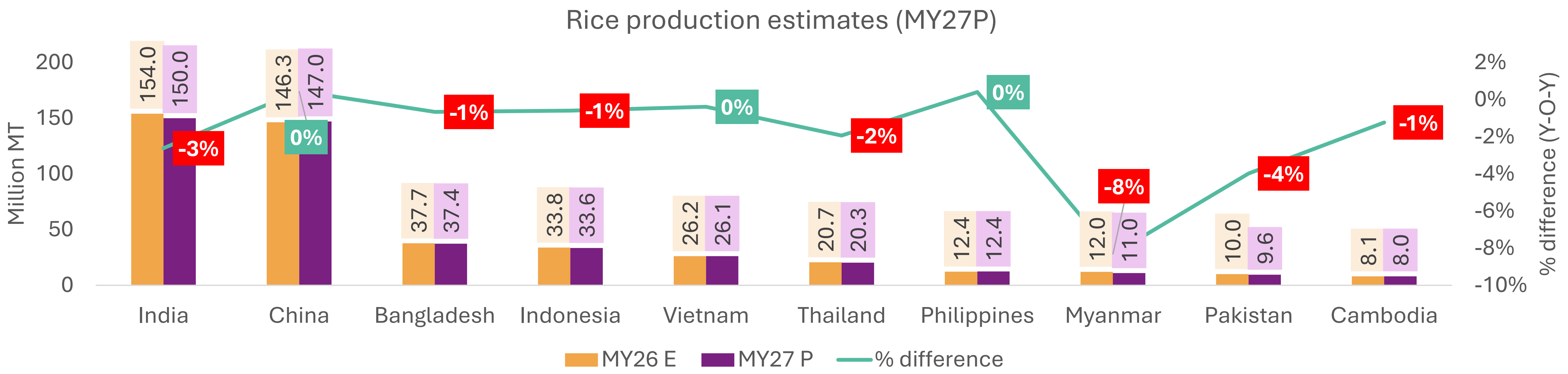

*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

- Global rice acreage is **expected to decline in MY27P**, projected at around **170.8 million hectares**, for the first time after MY15, indicating limited scope for supply expansion through area growth.
- A **slight contraction in Southeast Asian acreage in MY27P** is likely to tighten the global export flexibility. Declines in key countries such as Thailand, Vietnam, Indonesia, Myanmar, Philippines and Cambodia could **reduce the buffer supply available in the global market**, thereby increasing reliance on Indian exports to balance trade, given surplus stocks available in India.
- Nigeria is projected to face a **major decline (~11% YoY) in paddy acreage** due to sharp fall in paddy prices, influx of cheaper imported rice and rising fertilizer and fuel costs leading to closure of rice mills and weak farmer profitability.

*Source: USDA*; MY26 acreage estimated and MY27 projected based on historical trends and secondary research;

*Note- The % changes displayed in graph are from unrounded figures*

# Production estimates of major producing countries




*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

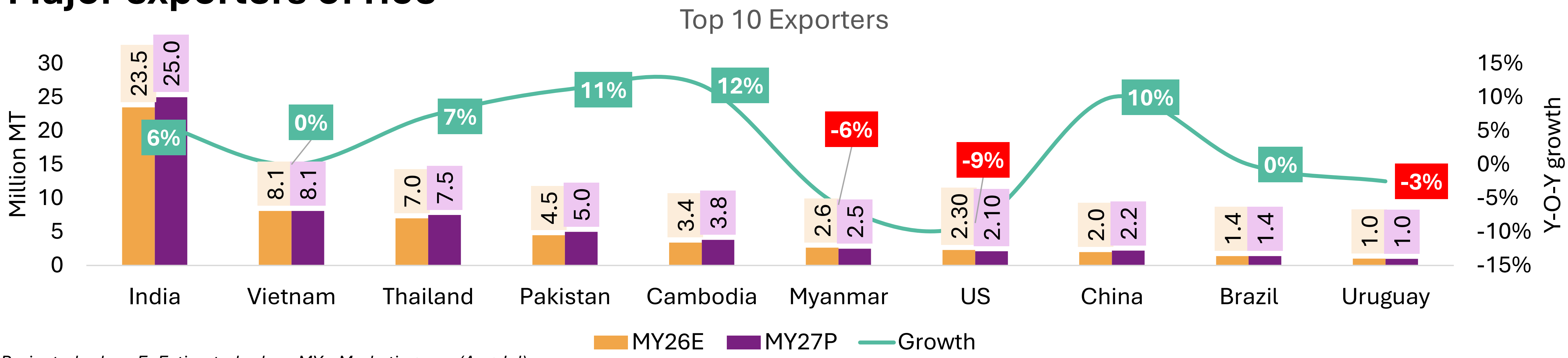
- **Global rice production in MY27P is projected to decline marginally by ~1.6% YoY to 537.2 MMT**, driven by lower planting projected across several Asian markets amid rainfall uncertainties, coupled with elevated fertilizer costs and constrained input availability.
- **India's rice production is expected to moderate from the record levels achieved in MY26**, reflecting lower acreage and potential yield pressures amid expectations of below-normal rainfall. In contrast, **China's production is projected to increase slightly (~0.4%)**, supported by stable acreage and improved productivity.
- **Myanmar's rice production is forecast to decline by ~8% YoY in MY27P**, primarily due to a reduction in cultivated area and lower yields, as farmers are expected to limit the use of high-cost inputs such as fertilizers and diesel.
- **Pakistan's rice production is projected to decline by ~4% YoY in MY27P**, largely owing to reduced planted area. Water scarcity, input availability challenges, and elevated energy costs are expected to constrain cultivation and weigh on overall production.

*Source: USDA*; MY26 production figures are estimated and MY27 are projected based on historical trends and secondary research; *India's production figures have been referred from MoA&FW and projected based on trend analysis & interactions*

*Note- The % changes displayed in graph are from unrounded figures*

# Export trends and price outlook

# Major exporters of rice




*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

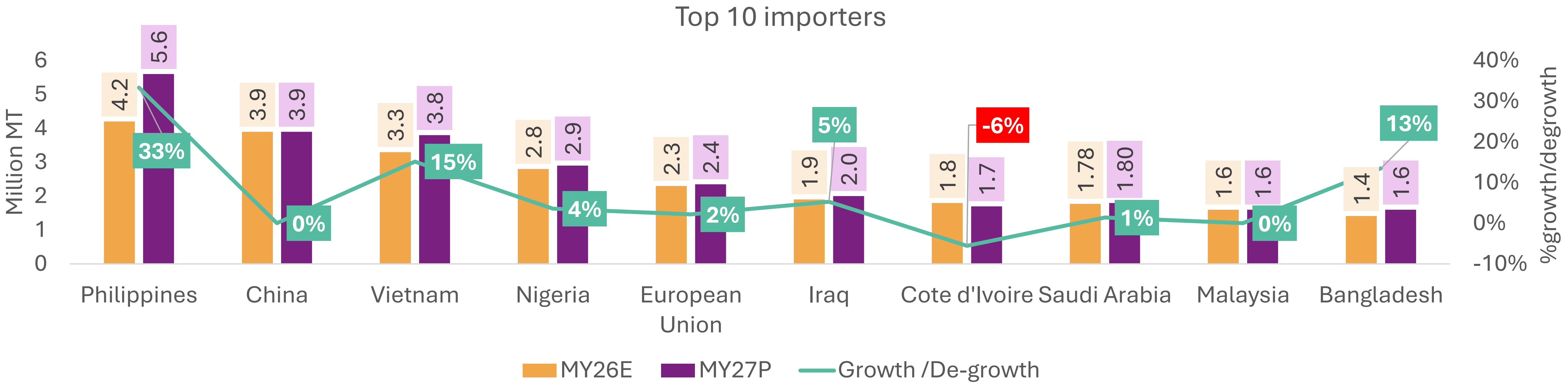
| % share of global exports | 39% | 13% | 12% | 7% | 6% | 4% | 4% | 3% | 2% | 2% |
|---|---|---|---|---|---|---|---|---|---|---|

- The countries shown in the graph **collectively represent ~92%** of global rice exports.
- **Global rice exports in MY27P are forecast to increase by ~4%** caused by large expected shipment from major exporters such as India, Pakistan, Thailand and Cambodia.
- **India is projected to remain the world's largest rice exporter in MY27P,** with exports rising to 25.0 MMT on the back of strong exportable surpluses and competitive pricing. Thailand is expected to post higher export volumes, while Vietnam is likely to maintain stable shipments, supported by resilient demand across Africa and Southeast Asia.
- **Rice exports from Myanmar (-6% YoY), Uruguay (-3% YoY), and the US (-9% YoY)** are projected to decline in MY27P, reflecting lower exportable surpluses driven by reduced acreage, weather-related yield pressures, and weaker demand for long-grain rice.
- **Pakistan is expected to record higher rice exports in MY27P**, driven by expanding market penetration in China, particularly in Guangzhou and Shenzhen, as part of a broader strategy to diversify beyond traditional export destinations.

*Source: Exports for MY2026E and MY2027P* are projected based on historical trends, trade interactions and secondary research *based on data from Production Supply & Distribution Data, USDA, rice milled*

*Note- The % changes displayed in graph are from unrounded figures*

# Major importers of rice




| % share of global imports | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 8% | 6% | 6% | 5% | 4% | 3% | 3% | 3% | 3% | 2% |

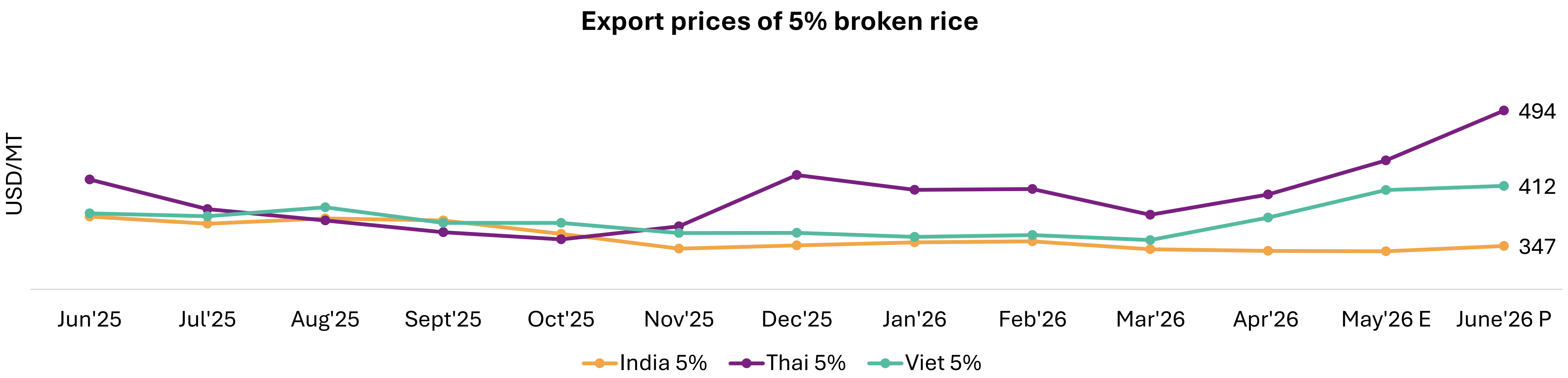
*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

- The countries shown in the chart collectively account for **approximately 43% of global rice imports**.
- Global rice imports are **projected to reach a record 60.2 MMT in MY27P, up ~6% YoY,** marking the third consecutive year of growth, driven primarily by **robust demand from Sub-Saharan Africa and Southeast Asia.**
- **The Philippines** is expected to remain the world's largest rice importer, with imports rising by **~33% YoY** to a record 5.6 MMT in MY27P, supported by strong domestic consumption.
- **Vietnam** rice import is projected to increase approximately 3.8 MMT in MY27P, **representing ~15% YoY growth**, primarily driven by higher inflows from Cambodia.
- **Côte d'Ivoire's rice imports** are projected to **decline by ~6% YoY in MY27P**, supported by a rebound in domestic production and higher carryover stocks, reducing the country's import requirements.

*Source: Imports for MY2026E and MY2027P* are projected based on historical trends, trade interactions and secondary research *based on data from Production Supply & Distribution Data, USDA, rice milled*

*Note- The % changes displayed in graph are from unrounded figures*

# Export prices trend for 5% broken rice

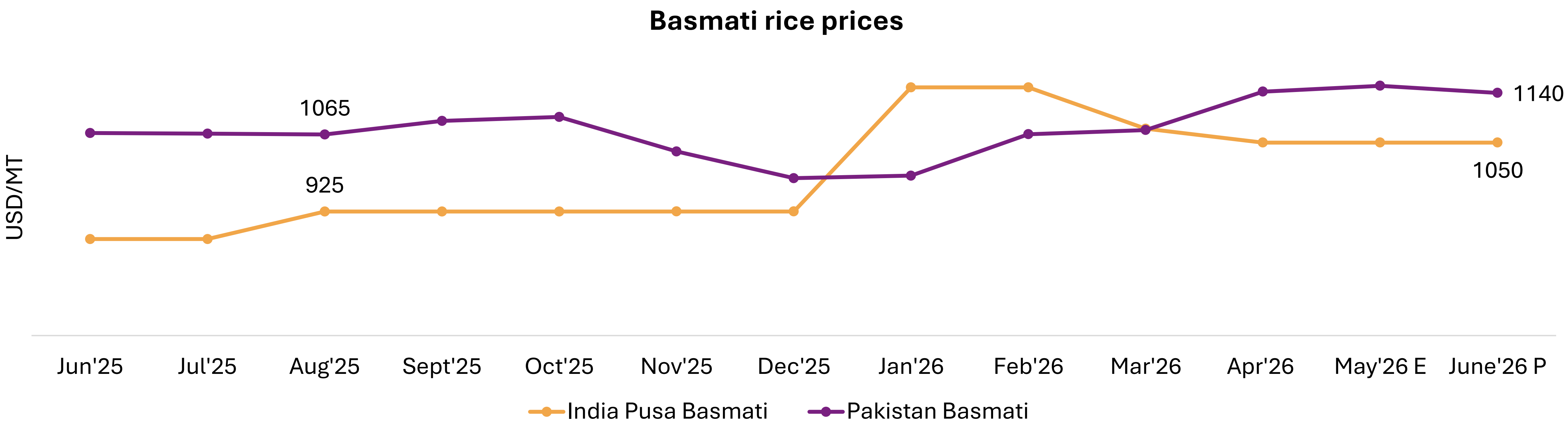



*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

- **Global 5% broken rice export prices are expected to increase in June'26 as** firmer demand from Asia and Africa coincides with rising prices in major exporting countries. Weather concerns in Southeast Asia, higher logistics and production costs, are expected to outweigh the influence of ample Indian supplies, resulting in a broad upward movement in price.
- **India's 5% broken rice export prices are expected to remain firm in MY27P,** supported by sustained buying interest from African and Asian markets. Steady domestic demand, along with elevated freight and input costs, is likely to keep exporters' offers stable and support FOB quotations.
- **Thai export prices are expected to strengthen due to** improved export demand, firm paddy prices and expectation of stronger second-half shipments as buyers advance purchases are tightening near-term availability.

*Source: FAO rice price update*

# Export prices trend for Basmati rice




*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

- Indian Basmati export prices are expected to remain largely stable on month in Jun'26, as steady demand from key destination markets is likely to be balanced by adequate export availability. Competitive pricing from Pakistan is expected to limit significant upside in Indian FOB quotations.
- Pakistan's Basmati export prices are projected to ease marginally in Jun'26 following recent highs. The price premium over Indian Basmati, coupled with greater supply availability, is expected to exert moderate downward pressure on export quotations in the near term.

*Source: FAO rice price update*

# Export prices forecast of Non-Basmati and Basmati rice

| Product | June'26 Price (USD/MT) | June'25 Price (USD/MT) | YoY %age change | Indicative price change direction | Forecasted average price range for JAS 2026 (USD/MT) |
|---|---|---|---|---|---|
| **India 5%** | 347 | 379 | **-8%** | **Bullish** | 350-375 |
| **Thai 5%** | 494 | 419 | **18%** | **Sideways** | 450-510 |
| **Viet 5%** | 412 | 383 | **8%** | **Bullish** | 410-440 |

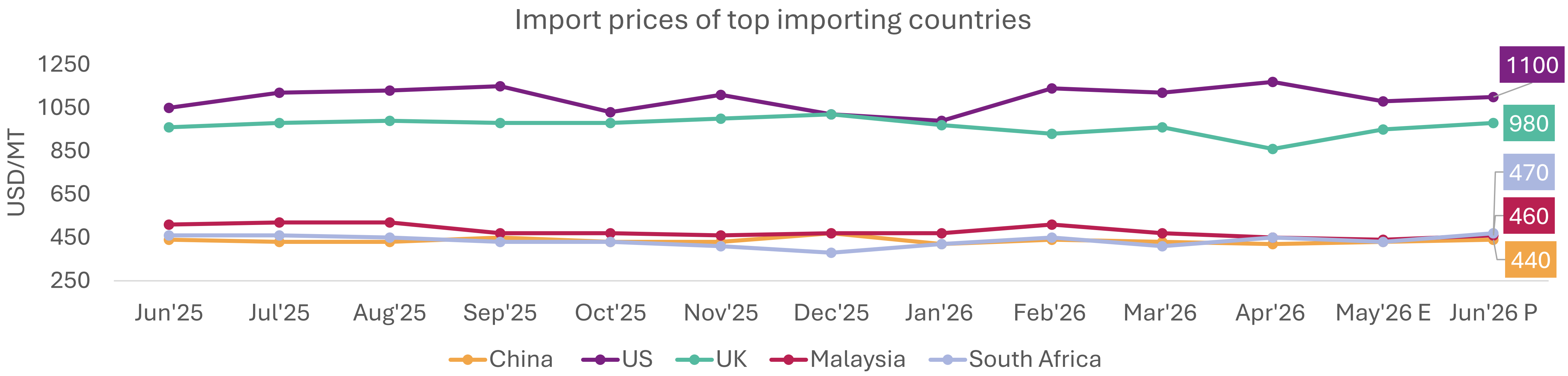
| Product | June'26 Price (USD/MT) | June'25 Price (USD/MT) | YoY %age change | Indicative price change direction | Forecasted average price range for JAS 2026 (USD/MT) |
|---|---|---|---|---|---|
| **India Pusa Basmati** | 1050 | 875 | **20%** | **Sideways** | 1030-1090 |
| **Pakistan Basmati** | 1140 | 1067 | **7%** | **Bearish** | 1050-1110 |

- **Global basmati export prices are expected to remain firm in JAS 2026** as old-crop aged basmati stocks tighten before new arrivals, while importers in the Middle East and other key markets restock ahead of the fourth-quarter peak consumption and festive season. While stronger demand is likely to underpin prices, intense competition between Indian and Pakistani exporters is expected to limit significant upside and gradually narrow the price differential between the two origins.
- Global non-Basmati rice prices are expected to remain supported during JAS 2026, driven by weather-related production risks across Southeast Asia and elevated logistics costs. These factors are likely to outweigh the impact of comfortable global broken-rice supplies, supporting a bullish outlook for Vietnamese and Indian 5% broken rice prices.

*Source: FAO rice price update*

Note: Price forecasting has been done through fundamental analysis. JAS stand for July August & September

# Price trends of key importing nations



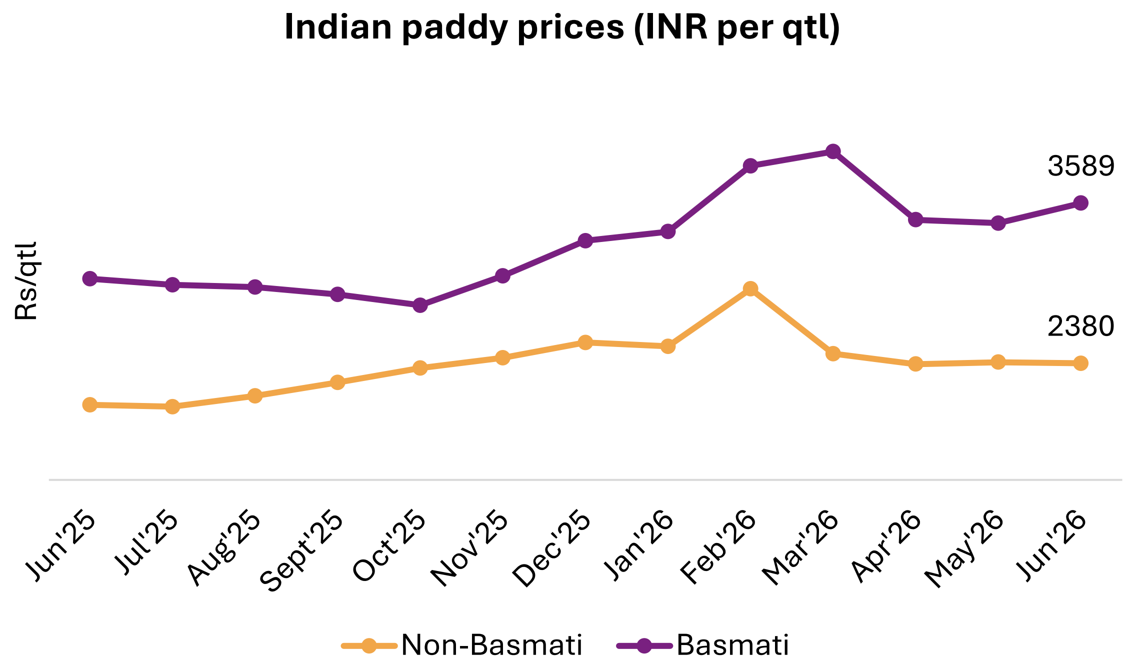

*P – Projected value; E- Estimated value; MY – Marketing year (Aug-Jul)*

- **Import prices across major consuming markets are expected to edge higher in Jun'26** compared with the previous month, supported by firmer export quotations from key Asian suppliers, rising freight and insurance costs, and increasing weather-related supply risks. However, abundant availability of Indian non-Basmati rice is expected to temper the pace of price increases.
- **China's import prices are projected to remain firm**, driven by a higher share of premium Basmati and fragrant rice imports, elevated global freight costs, and weather-related supply concerns across key Southeast Asian exporting countries.
- **Malaysia's import prices are expected to remain supported by its continued reliance on imported white rice**, while stronger export quotations from Thailand and Vietnam, coupled with stable Indian prices, are likely to keep average import costs elevated.

*Source: Prices are from ITC Trade Map (till Apr 2026); May & June 2026 figures are seasonality and trend-based estimates.*
*HS code: 1006*

*Note: Major importing countries are selected based on the availability of price data*

# Domestic paddy price outlook




*P – Projected value; E- Estimated value; INR per Qtl- Rupees per Quintal*

| Product | June'26 Price (USD/MT) | June'25 Price (USD/MT) | YoY %age change | Indicative price change direction | Forecasted average price range for JAS 2026 (USD/MT) |
|---|---|---|---|---|---|
| **Non-Basmati Paddy** | 2380 | 2066 | **15%** | **Sideways** | 2350-2600 |
| **Basmati Paddy** | 3589 | 3018 | **19%** | **Bullish** | 3600-4000 |

- **Non-Basmati paddy prices are expected to trade sideways in Jun'26**, with steady miller demand and limited arrivals providing support, while ample rice stocks and subdued procurement activity restrict significant price gains. Market sentiment is also likely to remain cautious pending greater visibility on monsoon performance and kharif sowing.
- **Basmati paddy prices are projected to remain bullish**, supported by tight old-crop supplies, strong export demand, and lower private stock holdings. Anticipation of limited availability until the next harvest is expected to keep procurement activity firm and support further price appreciation.

*Source: Agmark net* *Note: Price forecasting has been done through fundamental analysis. JAS stands for July August & September*

# Thank You

# Methodology for price forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

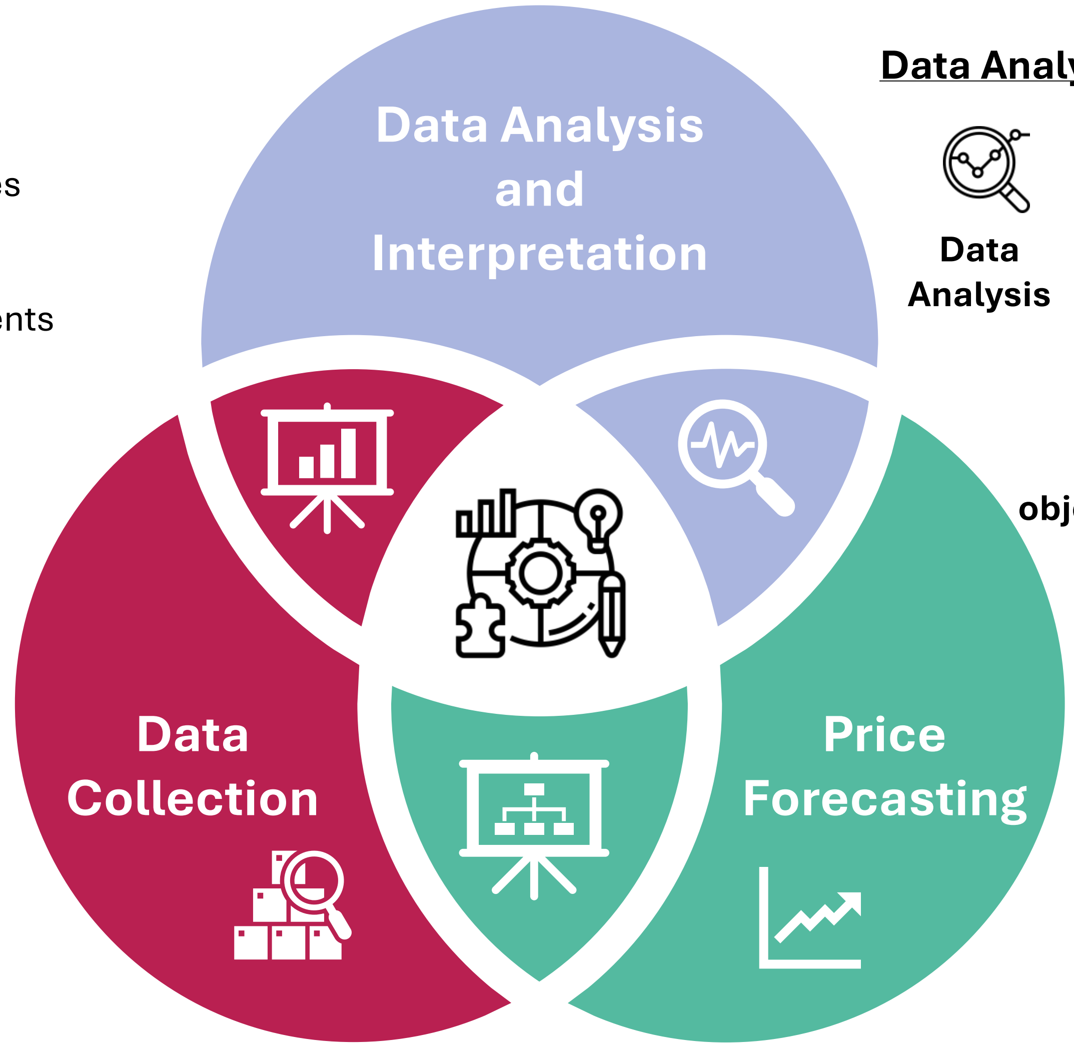
## Data Collection

**Sources**

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports

**Policy Updates**

- Detailed review of Production policies & trade barriers for each country
- Data from government websites & official publications




## Data Analysis and Interpretation

**Data Analysis**

- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations

**Key objectives**

- Production trends
- Trade dynamics
- Policy implications

## Price Forecasting

- Historical Trend & Seasonality of FOB prices
- Macro-Economic & Trade Variables

Integration of commodity fundamentals and their analysis to forecast future price ranges.

***Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.***