

FOCUS **RICE**

Trusted.
Independent.
Committed.

2025 Edition



SGS

The global rice market



"As rice remains a cornerstone of food security and trade across the world, SGS is proud to stand at the forefront of quality, sustainability and innovation. With our extensive network and decades of technical expertise, we continue to support producers, traders and regulators in building confidence and consistency across every grain."

Trent Charlton-Maughan, Regional Business Development Manager (Asia-Pacific)

Rice is a staple food that nourishes billions of people.

Globally, rice is one of the most traded food commodities, and the third most produced cereal crop,^[1] providing essential fiber, vitamins and minerals, with varieties ranging from long-grain and short-grain to parboiled, sticky, brown, and wild rice.^[2]

Before it is sold worldwide, though, its journey begins with its harvest from rice paddies, followed by a milling process that removes the husk and bran layers.^[3] In the past decade, rice consumption has risen by more than 50 million metric tons, highlighting its importance to global food security. In fact, China, India and Bangladesh are the largest consumers of this nutritious grain, with China alone consuming over 154 million metric tons in the 2022/2023 fiscal year.^[4]

But how can we know for certain that the rice traded is high-quality and safe for consumption?

That's where SGS comes in.

As a member of the Grain and Feed Association (Gafsa) Superintendent, Analyst and Fumigator approved registers, we play a vital role in supporting the rice sector. Our experts ensure that producers, importers and exporters alike can trust the quality, safety and compliance of every shipment.

Throughout this newsletter, we will take an in-depth look at the state of the global rice market by examining our operations across:

- **Cambodia**
- **China**
- **India**
- **Indonesia**
- **Malaysia**
- **Myanmar**
- **Pakistan**
- **Philippines**
- **Singapore**
- **Thailand**
- **Vietnam**

We will explore trends, market challenges, and how our trusted experts support the industry, whether on the ground or in the laboratory.

Read on to learn more.

[1] Rice – Worldwide Market Outlook 2025. (2025) Statista. Available at:

<https://www.statista.com/outlook/cmo/food/bread-cereal-products/rice/worldwide>

[2] Rice - Statistics & Facts (2025) Statista. Available at: <https://www.statista.com/topics/1443/rice/>

[3] Top countries based on production of milled rice (2025) Statista. Available at:

<https://www.statista.com/statistics/255945/top-countries-of-destination-for-us-rice-exports-2011/>

[4] Rice consumption worldwide in 2024/2025, by country (in 1,000 metric tons) * (2025) Statista. Available at:

<https://www.statista.com/statistics/255971/top-countries-based-on-rice-consumption-2012-2013/>



Trusted, independent and committed



Testing



Inspection



Fumigation & Pest Management



Risk Management



Audit & Certification

At SGS, we ensure quality, quantity, and testing, delivering an extensive suite of value added services for rice.

By combining cutting-edge laboratory facilities with rapid on-site **testing**, we provide precise and impartial data that validates the quality and safety of your rice.

Our **inspection** services, accredited by **Gafta** and the Federation of Oils, Seeds and Fats Associations (**FOSFA**), amongst other international bodies, support the proper handling and storage of rice at every stage of the supply chain. Wherever your commodities originate or are destined, our experts are present to inspect, verify, analyze, and advise in line with contract terms and regulatory obligations.

We also know that risks extend beyond compliance. Our stock monitoring agreements and guarantee services provide transparency and assurance, empowering you to quantify risks, understand potential impacts, and take corrective action where necessary.

Additionally, during storage and transportation, rice can be vulnerable to infestations. As a world leader in **fumigation and pest management**, we deliver comprehensive solutions designed to prevent, contain, and eradicate insect and pest contamination. Our integrated **risk management** solutions that help improve efficiency while minimizing risk.

Throughout the supply chain, trust and transparency remain central to everything we do. That is why we also provide blockchain-backed authentication through **SGS Secured Document**. With this, we verify documents instantly, protect against fraud, and strengthen confidence across the supply chain, ensuring that every certificate and report issued is tamper-proof and fully trusted.

Why choose SGS?

Because we are trusted, independent, and committed, from the field to the final shipment.





Focus on: Cambodia

"The SGS Agri team always provides the best support, especially their inspection team."

Mrs. Heak and Mr. Komsot (Golden Rice (Cambodia) Co., Ltd.)

As one of Southeast Asia's fastest-growing rice producers, Cambodia continues to strengthen its foothold in key markets across Europe, Malaysia and China. To meet growing demand, we continue to expand our team with additional inspectors to ensure responsiveness and full coverage across the supply chain.

Our Capabilities and Services

We began operations in Cambodia in 2013, making it one of our newer but steadily expanding agricultural markets. Over the past decade, we have supported Cambodia's transformation into a key global rice supplier, helping the industry strengthen its quality systems and export readiness.

Recently, the Cambodian government introduced the Milled Rice Market Expansion and Export Diversification Strategy 2025, which is an initiative aimed at consolidating Cambodia's position in traditional fragrant rice markets while opening new

destinations ^[5]. With our team based in **Phnom Penh**, we are strategically positioned to help exporters adapt to this strategy, supporting their competitiveness in both established and emerging markets.

Our commercial and inspection teams deliver essential services that exporters depend on. From pre-shipment sampling, tally and loading inspections to damage surveys, we ensure consignments meet all contractual and quality requirements. Our certification services cover quality, weight, container cleanliness and analysis, and provide trusted documentation that enables Cambodian rice exporters to access international markets with confidence.

By combining local expertise with internationally recognized standards, we help Cambodia's rice industry build resilience, maintain quality and strengthen its reputation.

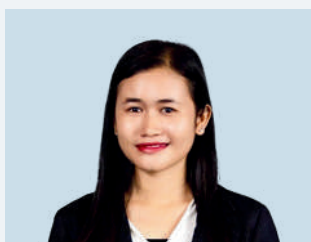
[5] Cambodia launches five-year Premium Rice Export Strategy, targeting Asia's middle class (2025) Cambodia Investment Review. Available at: <https://cambodiainvestmentreview.com/2025/08/27/cambodia-launches-five-year-premium-rice-export-strategy-targeting-asias-middle-class>



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Focus on: China

"SGS is our good partner with long-term cooperation of more than 20 years. They always present integrity, professionalism and promptness for rice inspection service."

Ma Yunwei (Louis Dreyfus Company Asia Pte Ltd.)

China plays a dual role in the global rice trade, as both a major importer and exporter. It sources rice from Thailand, Vietnam, Cambodia, India, Myanmar and Pakistan, while exporting to destinations such as Turkey, Egypt, Japan, Papua New Guinea, Cameroon and the Ivory Coast.

An analysis of consumer demand shows an increasing shift toward premium aromatic rice varieties, such as Thai jasmine and Indian basmati, which are not widely cultivated domestically. This trend has fueled greater imports and diversification of sourcing channels, creating new quality and compliance challenges across the value chain.

Our Capabilities and Services

Since 1991, we have built one of the most comprehensive rice service networks in China, operating 12 laboratories and nine trade offices strategically located across **Beijing, Tianjin, Dalian, Qingdao, Nanjing, Shanghai, Chengdu, Chongqing, Wuhan, Ningbo, Guangzhou and Xiamen.**

Our laboratories deliver advanced analytical capabilities, including pesticide residue and heavy metal detection, GMO identification, microbiological analysis and nutritional profiling. Inspections cover all stages of the supply chain, from pre-shipment sampling and loading supervision to tally, sealing, draft surveys and cleanliness checks.

In 2024–2025, we inspected more than 600,000 metric tons of rice and conducted over 1,200 analyses, helping ensure reliability and compliance across China's import and export markets.

We operate under internationally recognized standards, holding ISO 17025 accreditation from CNAS, UKAS and DAKKS, CMA recognition for food inspection and testing, and CATL accreditation for agricultural product testing. We are also certified as Analysts and Superintendent Members of both Gafta and the Federation of Oils, Seeds and Fats Associations (FOSFA), reinforcing our reputation as a trusted partner for rice traders worldwide.



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Focus on: India

As the largest exporter of rice in the world, India supplies markets across the US, Europe, Africa, the Middle East and the Asia Pacific. In 2024, just three states — Telangana, Uttar Pradesh and West Bengal — accounted for more than 35% of total national rice production.^[6]

This achievement comes despite significant challenges in recent years, including extreme precipitation that disrupted fields in several regions.

Our Capabilities and Services

India has been one of our most established rice markets, having first opened offices in 1950. Today, we operate five laboratories, supported by eight trade offices and 17 operational bases across **Haryana, Gujarat, Madhya Pradesh, Tamil Nadu, Andhra Pradesh, Maharashtra, West Bengal and Telangana**. This network enables us to deliver comprehensive services for exporters, traders and regulators alike.

Our laboratories test rice against more than 1,000 agrochemical residues, in line with EU and FSSAI

standards, and provide analysis for heavy metals, mycotoxins, microbial contaminants, DNA varietal authenticity, GMO content and sensory characteristics. On the ground, our inspectors deliver quality and quantity verification, backed by tailored Guarantee services and stock monitoring agreements (SMA).

In 2024–2025, we conducted over 8,700 rice analyses and inspected six million metric tons of cargo. Our longstanding memberships with Gafta, FOSFA and SEA further strengthen our credibility and give clients confidence that their trade is supported by services that are globally recognized and trusted.

This extensive network delivers an unmatched breadth of testing and inspection services, covering everything from field-level sampling and laboratory analysis to certification, risk management and trade assurance.

[6] Rice industry in India - Market Size & Demand (2025) Mordor Intelligence. Available at: <https://www.mordorintelligence.com/industry-reports/india-rice-market>



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Focus on: Indonesia

Indonesia remains one of the world's largest rice markets, ranking as the third-largest importer and the fourth-largest producer^{[7][8]}. Predominantly an importing nation, it sources rice from Vietnam, Thailand, Myanmar and India. Rice plays a vital role in Indonesia's food system, second only to oil palm fruits in terms of agricultural production volume. In recent years, the sector has faced challenges linked to climate variability. El Niño conditions at the end of 2023 significantly reduced yields, underscoring the vulnerability of local production to extreme weather.

Yet, optimism remains strong with projections for the 2025/2026 planting season estimate national output will reach 35.6 million tons, surpassing government targets and marking the highest level in three years.

Our Capabilities and Services

We have been supporting Indonesia's rice sector since 2009, with laboratories and trade offices located in Jakarta, Medan and Banjarmasin. In 2024, we strengthened our presence by relocating our Medan laboratory to a larger, more advanced facility, enabling faster and more efficient service delivery for clients nationwide.

Our laboratories perform microbiological, heavy metal and pesticide residue analysis to ensure rice safety and compliance with both domestic and international standards. On site, our inspectors provide a full suite of inspection services, including cargo sampling, weighing, tally, loading supervision and discharge monitoring.

We operate to the highest international standards, holding ISO 17025 and ISO 9001 accreditations, and are recognized as Gafta Superintendent and Analyst Members, as well as by FOSFA. These credentials ensure that every service we deliver is benchmarked against global best practice, giving clients confidence in the quality and compliance of their rice shipments.

Through our accredited testing and inspection network, we continue to help Indonesia's rice industry protect quality, maintain market confidence and meet the growing demands of global trade.

[7] Topic: Rice market in Indonesia (2025) Statista. Available at:

<https://www.statista.com/topics/12200/rice-market-in-indonesia/>

[8] Food Outlook – Biannual report on global food markets (2025) Food Outlook. Available at:

<https://doi.org/10.4060/cd5655en>



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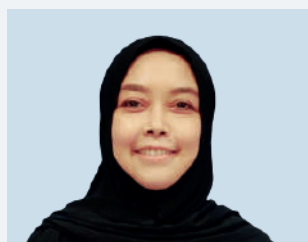
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Focus on: Malaysia

Rice remains a cornerstone of Malaysia's food security and agricultural policy^[9]. The government maintains licensing and regulatory controls over rice exports to safeguard domestic supply, with "special permission" required to export certain varieties, particularly staple medium rice, or during periods of limited local availability.

Our Capabilities and Services

We have been operating in Malaysia since 1971, with 11 offices and laboratories strategically located across the country, including **Shah Alam, Port Klang, Senai, Bintulu, Seberkas, Pasir Gudang, Kuching, Prai and Sandakan**. Through this extensive network, we provide reliable support to rice producers, traders and exporters nationwide.

Our laboratories conduct nutritional testing to verify macro- and micro-nutrient content — including vitamins, minerals and amino acids — ensuring compliance with labeling requirements and consumer expectations. We also perform comprehensive mycotoxin analysis to detect and quantify contamination in accordance with strict food and feed regulations.

During the trade stage, our inspectors provide on-site solutions covering tallying, sampling, loading and discharge supervision, and damage surveys. Each service is designed to help clients maintain quality, transparency and compliance throughout the supply chain.

With over five decades of experience in Malaysia, we continue to help the rice industry meet local and international standards, protect food quality and strengthen trust in every shipment.

[9] Rice market size, share | industry growth and outlook by 2030. (2025) Industry Arc. Available at: <https://www.industryarc.com/Research/Rice-Market-Research-509581>



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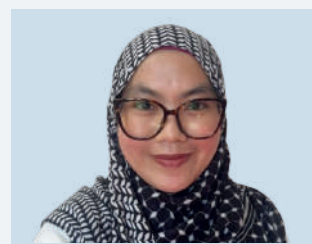
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Focus on: Myanmar

"We have been working with SGS for nearly two decades with our rice export shipments, and their role as an unbiased third-party has been invaluable."

Kyaw Min Tun, (Shwe Wah Yaung Agriculture Production Co., Ltd.)

Myanmar continues to play a significant role in the global rice trade, supplying key markets across Asia, Africa and Europe. In 2023, the country accounted for around five percent of global milled rice exports, underscoring its importance as one of the world's leading suppliers.^[10]

Looking ahead, Myanmar has set an ambitious target of three million metric tons of rice exports for FY 2025–2026, with more than 840,000 metric tons already shipped within the first four months of the fiscal year. These figures reflect both the resilience of the industry and the need for trusted, independent verification to sustain trade confidence and meet growing demand from international markets.

Our Capabilities and Services

We have been operating in Myanmar since 1948 and today employ more than 200 specialists across inspection, laboratory and trade functions. Our laboratory in **Yangon**, accredited to ISO 17025, offers

more than 100 testing parameters covering food, feed, soil, water and minerals. This comprehensive analytical scope enables us to meet both domestic and international requirements, providing exporters with accurate, reliable data to access global markets. Between January 2024 and June 2025, we inspected more than 11 million metric tons of rice and tested over 1,700 samples, ensuring that exports to destinations such as Indonesia, China, Bangladesh and the Philippines consistently meet international quality and safety standards.

Our inspection teams deliver a full range of services, including quality and quantity verification, sampling, tally, draft surveys and container and hatch cleanliness checks, all of which are essential for maintaining shipment integrity. To further protect cargo, we also provide fumigation services for vessels, warehouses, containers and silos, supported by pest control solutions that minimize risks during storage and transport.

[10] Myanmar (2022) Myanmar | International Rice Research Institute. Available at: <https://www.irri.org/where-we-work/myanmar>



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Focus on: Pakistan

"The SGS team has deep knowledge about all rice quality analyses. They are very professional and always available to guide us whenever needed."

Farhat Rasheed (Bulk Management (Pakistan) Pvt. Ltd.)

As one of the world's top rice exporters, Pakistan supplies key markets across Indonesia, Kenya, the Philippines, Malaysia, China and Madagascar.

In 2025, heavy rainfall and flooding have threatened production levels, but overall operations have not experienced significant disruption. These events nonetheless highlight the vulnerability of agricultural production to extreme weather and reinforce the need for robust solutions to safeguard rice quality, protect cargo and maintain the confidence of international buyers.

Our Capabilities and Services

Since 1952, Pakistan has been a cornerstone of our global rice activities. To support our ability to deliver best-in-class solutions, in 2024, we relocated our head office in **Karachi** to larger, modern facilities. Alongside this facility, we continue to operate offices and laboratories in **Lahore and Islamabad**, employing nearly 300 full-time agricultural specialists.

Through this dedicated team, we analyzed 15,850 rice samples and inspected close to three million metric tons of shipments in 2024–2025 alone.

In the field and at ports, our inspection teams support every stage of the supply chain, including cargo sampling, tally, loading supervision, and quality and quantity verification. To protect rice during storage and transport, we also provide a wide range of fumigation solutions. In 2024, we expanded our portfolio to include CO₂ treatments and invested in multi-gas detectors, ensuring consignments remain fully secure throughout shipment.

Within Pakistan, we hold the unique distinction of being the only company with Analyst, Superintendent and Fumigator membership of Gafta, reinforcing our authority and credibility in the rice trade. Looking ahead, we are strengthening our presence in Multan and Peshawar with expanded business development teams, while also increasing capacity in production analysis.



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Focus on: Philippines

The Philippines is both one of the world's largest rice importers and the eighth-largest producer. In 2024–2025, milled rice production is estimated at 12.37 MMT, while imports, sourced mainly from Vietnam, rose by 30% to 4.8 MMT between 2023 and 2024.

In August 2025, the Philippine government announced a 60-day import suspension for well-milled and regular-milled rice, beginning September 1, to protect local farmers during the harvest season. Following this policy, the USDA projected rice imports to decline by 9.3% to 4.9 MMT this year, down from an earlier forecast of 5.4 MMT.^[11]

Our Capabilities and Services

Since 1949, we have proudly supported the Philippines' rice sector through our nationwide network of offices, laboratories and inspection teams. Our operations cover major ports across the country, with team members dedicated to ensuring quality, safety and compliance throughout the supply chain. Our laboratory in Makati City is accredited to ISO/IEC 17025:2017, and recognized by the Bureau of Plant

Industry, Fertilizer and Pesticide Authority, and Food and Drug Administration. It provides a wide range of testing services, including nutritional analysis, heavy metals, vitamins and minerals, and microbiological testing. We are also Gafta-approved Superintendents and Analysts, and an accredited surveyor under the Philippine Bulk and Break-Bulk Cargo Clearance Enhancement Program.

Our inspection services include discharge and loading supervision, tally and draft surveys, warehouse inspections, cargo condition surveys and sampling, all conducted in full alignment with Gafta and FOSFA standards. We further support risk management through our Full Outturn Guarantee (FOG) and Stock Monitoring Agreements (SMA), helping clients manage exposure and maintain assurance across every shipment.

Our technical expertise, impartiality and global reputation continue to set us apart. We ensure the quality and quantity of rice and other commodities at every stage of the supply chain, enabling our clients to trade confidently, efficiently and in full compliance with international standards.

[11] Othel. V Campos (2025) USDA reduces ph rice import forecast by 500,000 MT | Manila Standard. Available at: <https://manilastandard.net/business/314629554/usda-reduces-ph-rice-import-forecast-by-500000-mt.htm>



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Focus on: Singapore

Singapore is a vital trading and logistics hub for the Asia-Pacific rice market. Locally, consumers primarily favor Hom Mali rice from Thailand and jasmine rice from Vietnam, which together account for around 80–90% of total rice imports^[12]. Despite its dependence on imported supply, Singapore has built a reputation for stability through its Rice Stockpile Scheme (RSS), which is a government initiative that requires importers to maintain a strategic reserve to safeguard national food security.

Positioned at the heart of regional trade, we connect clients with both local and international experts through our Singapore office, which serves as our Asia-Pacific (APAC) regional hub. From here, we coordinate seamlessly with partners and clients across the region, ensuring reliable, high-quality service delivery that supports the continuous movement of rice and other agri-commodities throughout global markets.

[12] Interview: Singapore rice supply stable amid global price swings: Importers association (2025) S&P Global Commodity Insights. Available at: <https://www.spglobal.com/commodity-insights/en/news-research/latest-news/agriculture/052925-interview-singapore-rice-supply-stable-amid-global-price-swings-importers-association>

Our Capabilities and Services

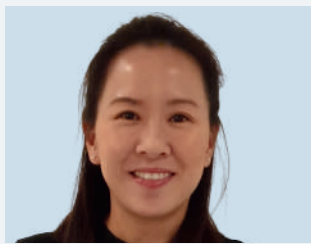
We have been operating in **Singapore** since 1971 and continue to expand our APAC footprint, supporting our clients' business growth across the region. Our experts coordinate all aspects of our services, from operations, sales and customer care to technical support and regional market insights, all of which ensures that every engagement benefits from both local understanding and global expertise.

Through our Singapore base, we serve as the link between international markets and national stakeholders, enabling efficient coordination, trusted communication and consistent quality assurance.

With our strategic presence in Singapore, we continue to strengthen regional connectivity, helping clients navigate evolving market dynamics and secure confidence in every shipment.



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Focus on: Thailand

Thailand remains one of the world's leading rice exporters, with a particularly strong presence in the US market. In 2024–2025, we inspected 1.2 million metric tons of rice and analyzed more than 3,000 samples, supporting the country's expanding export reach. A key milestone came in May 2025, when we handled Thailand's first China-bound rice shipment, marking a new chapter in the nation's trade relationships.

Rice and rice-based products, including white, jasmine and parboiled varieties, are Thailand's primary agricultural exports. The country's rice sector employs around 60 percent of its total agricultural workforce, reflecting its deep economic and cultural importance. However, ongoing droughts linked to El Niño and other climate change-related pressures continue to challenge production, reducing water availability and affecting yields.

Our Capabilities and Services

We have supported Thailand's rice sector since 1950, with operations based in **Bangkok and Korat**. Across these facilities, more than 450 full-time team members are dedicated to maintaining quality, safety and traceability throughout the agricultural supply chain.

Our laboratories perform comprehensive analyses, including microbiological testing, nutrient profiling, mineral and vitamin analysis, detection of food contaminants, heavy metals, mycotoxins, GMOs and pesticide residues. These services help our clients ensure their rice products meet local and international regulatory requirements and buyer specifications.

Our inspection solutions are designed to maintain consistency and compliance across every shipment. Each step of our process helps exporters confirm that their rice meets contractual standards before leaving port.

To protect cargo integrity during storage and transport, we deliver a full range of fumigation services for vessels, containers, barges, production lines and bulk cargoes with recirculation. These treatments prevent the spread of pests and disease, ensuring that rice cargo remains safe, compliant and ready for export.

Upon completion of our services, we provide globally recognized certificates, demonstrating trusted, independent verification and reinforce Thailand's reputation as a reliable rice supplier on the world stage.



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Focus on: Vietnam

"SGS proven expertise, forward-looking approach, and unwavering commitment to quality empower us to innovate, transform, and elevate the rice supply chain for the future."

Azman Shah Mohamed Noor (Padiberas Nasional Berhad (BERNAS))

Vietnam remains one of the world's top rice exporters, supplying major markets such as the Philippines, Ivory Coast, Ghana, China, Malaysia, Senegal and Bangladesh.^[13]

In 2023, Vietnam ranked third globally in rice exports, behind India and Thailand. While the northern rice terraces are among the country's most iconic landscapes, most production is centered in the Mekong Delta, the heart of Vietnam's rice economy. However, drought and salinity intrusion have made rice cultivation increasingly challenging. To adapt, many farmers have turned to rice-shrimp farming and other climate-resilient practices supported by government initiatives.

Our Capabilities and Services

We have been supporting Vietnam's rice sector since 1989 through facilities in **Ho Chi Minh City, Can Tho and Hai Phong**. Employing nearly 250 full-time agricultural specialists, our operations are strategically

located near key production and export hubs to ensure responsive and reliable service.

Our laboratories conduct a comprehensive range of analyses, including physical testing, pesticide residues, mycotoxins, GMOs, heavy metals, microbiology, nutritional profiling, DNA verification and amylose content. On-site, our inspectors oversee sampling, loading supervision, tally and draft surveys, stock monitoring and damage assessment.

We also provide fumigation services for bulk, breakbulk and containerized shipments, along with J-system, AFAS and ISPM 15 treatments for wood packaging materials. Operating under ISO 17025 and ISO 17020 accreditations, and as recognized members of Gafta and FOSFA, we ensure that every shipment meets the highest international standards.

Through our technical expertise, regional presence and globally recognized quality systems, we continue to help Vietnam's rice exporters safeguard quality, reduce risk and build lasting confidence with global buyers.

[13] Rice market in Vietnam - Statistics & Facts (2025) Statista. Available at: <https://www.statista.com/topics/10077/rice-market-in-vietnam/>



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Building trust in every grain

Together, we continue to build trust in every market, supporting a safer, more sustainable future for the global rice industry. We are dedicated to supporting the rice industry — from growers and traders to processors and distributors — with trusted, independent solutions that protect quality, safety and compliance at every stage of the supply chain.

Our strength lies in our global presence and local expertise. With more than 99,500 employees and a network of 2,500 offices and laboratories across 115 countries, we combine international standards with on-the-ground understanding to deliver consistency, precision and confidence in every market we serve.

We promise to deliver trusted, independent and committed solutions that help our clients navigate challenges, secure compliance and succeed in international markets. Through collaboration and expertise, we continue to build sustainable value, strengthen resilience and ensure that every grain traded meets the highest expectations, wherever it is grown, processed, or consumed.



Trusted. Independent. Committed.

Contact us

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SGS

When you need to be sure