

# RICE

## MARKET UPDATE AUGUST 2025

Global rice production in 2025 is projected to grow by 1% to 836 million tonnes (555.6 Mt milled basis), following a robust 2.8% growth in 2024, largely driven by strong harvests in Asia, especially India.

### Trade & Prices

- International rice trade is expected to hit a record 62 million tonnes (+3%).
- The Osiriz/InfoArroz Index fell to 189.7 in July and continued downward to 188 by mid-August.
- Prices are broadly declining across origins, with the exception of certain parboiled varieties.

### India

- Now the world's largest producer, overtaking China.
- 2025 exports projected at 25 million tonnes (+40% YoY), over 40% of global trade.
- Despite export surpluses, price softening is likely to continue.

### Thailand

- Prices declined 5% in July, as exporters compete with Vietnam.
- More softening expected as the first harvest hits markets late August.

### Pakistan

- Prices fell 1–1.5% in July.
- New harvests are improving exportable supply.
- 2025 exports expected at 6 Mt, only slightly down from 6.5 Mt in 2024.

### Italy – Domestic Market Pressure from Imports


- Italian producers face intense pricing pressure from low-cost paddy rice imports from Asia.
- This has especially affected mid-range varieties like Ribe and Roma.
- Despite higher production costs (labour, energy, sustainability standards), Italian growers have limited pricing flexibility.

### Stock & Sowing Trends


- Stock levels up significantly:
  - +48,000 tonnes YoY held by producers
  - +44,000 tonnes YoY held by processors/traders
- Carryover into next season projected at ~120,000 tonnes.
- 2025 sowing increased to ~235,500 hectares (+9,000 ha YoY)

📌 A market update on new Italian crop prices is expected early September.

### Implications for UK Ingredient Buyers

- ⚠️ Watch for continued global price softening, particularly on white and broken rice varieties.
-  Italian-origin rice may offer short-term buying opportunities due to domestic oversupply and import pressure, though long-term cost challenges persist.
- 📦 Sourcing from India and Pakistan remains favourable due to abundant exportable stocks, but monitor logistical or political disruptions.

### Summary & Recommendations

- 📈 Global rice prices are softening, with supply outpacing demand in key origins.
- 🏭 UK manufacturers should review forward contracts now, especially for Asian and Italian varieties under pressure.
-  Monitor Italian market developments in early September as new crop data emerges.

Available Products	Origin
Arborio Rice (Superfine) 10x2kg	Italy
Arborio Rice (Superfine) 25kg	Italy
Parboiled LG Brown Rice 25kg	Italy
Brown Selenio Round Rice 25kg	Italy
Carnaroli Rice 25kg	Italy
Nerone Black Rice 25kg	Italy
Parboiled LG White Rice 25kg	Italy
Parboiled Risotto Rice (Ribe) 25kg	Italy
Round White Rice 25kg	Italy
White Selenio Sushi Rice 25kg	Italy
Parboiled LG White Rice 5% 25kg	Pakistan
Parboiled LG Brown Rice 25kg	Non-EU
Parboiled LG Brown Rice 5% 25kg	Pakistan
Parboiled Basmati White Rice 2% 25kg	Pakistan
Parboiled Basmati Brown Rice 2% 25kg	Pakistan

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