

Alisher Mirzabaev
and
Valerien Pede

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Before the Next Harvest:
Rice Sector facing growing El Niño and input cost pressures

IRRI International Rice Research Institute

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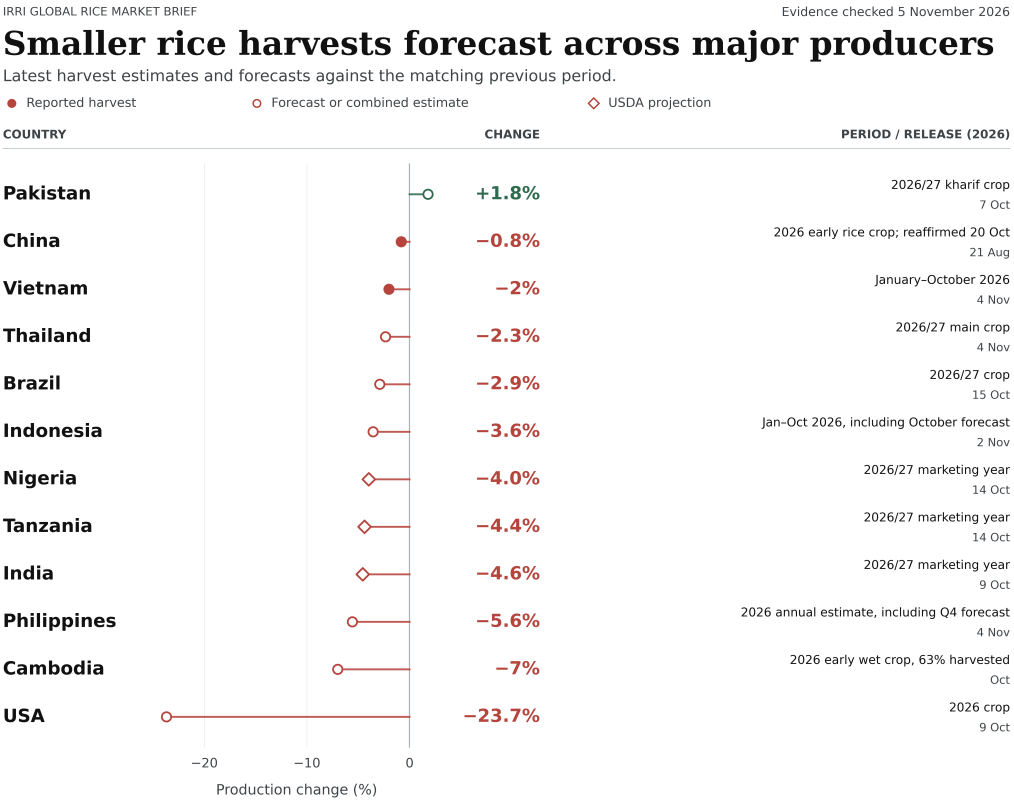
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Before the Next Harvest:
Rice sector facing growing El Niño and input cost pressures

Highlights

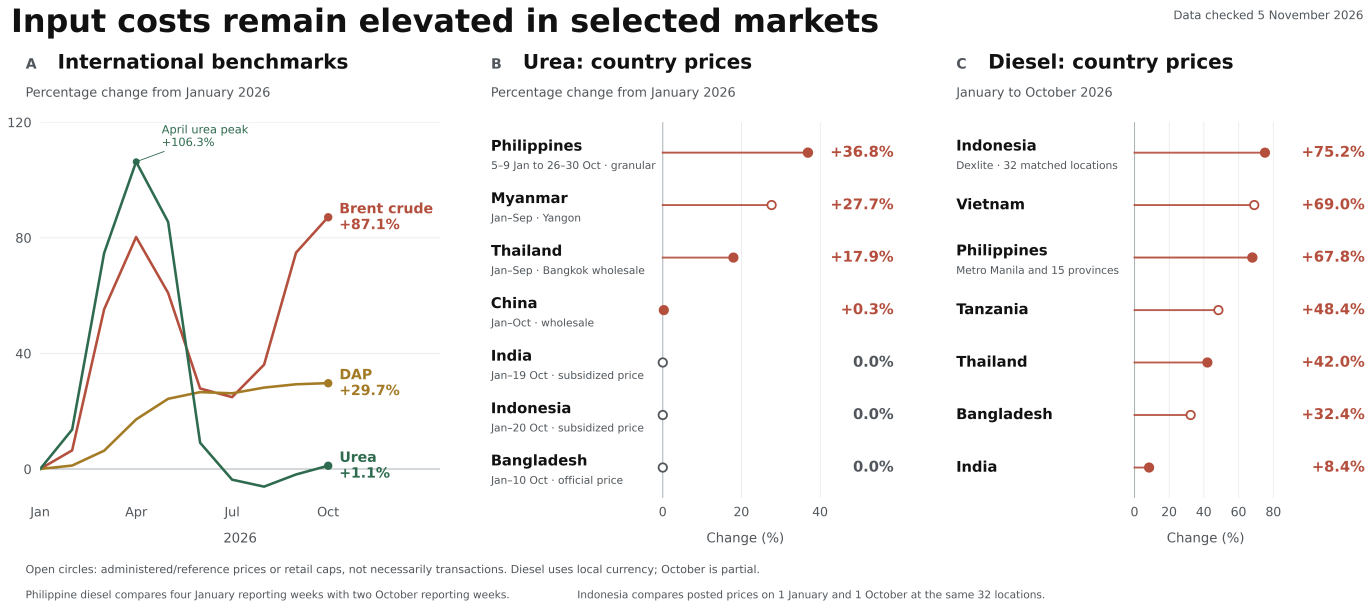
- El Niño-related weather disruptions and high input costs are reducing rice production in major rice growing countries.
- This is leading to rising international and domestic rice prices. In some countries, the pressure is already visible in consumer inflation numbers, hitting poorer households.
- Currently large rice stocks can continue providing a near-term buffer, but agricultural policies need to focus on protecting the next harvest.[1] Strong El Niño conditions are likely to persist through January-April 2027.
- Implementing efficient water management at scale, timely input access, targeted safety nets for poor households, and predictable international rice trade can help protect the next harvest and build rice sector resilience.

Global rice sector is facing compounding weather and cost pressures which are reducing rice production during this season. Although harvest outcomes vary across countries, emerging evidence clearly points to lower harvest volumes in 2026 across many key producers than during 2025.[1-9]



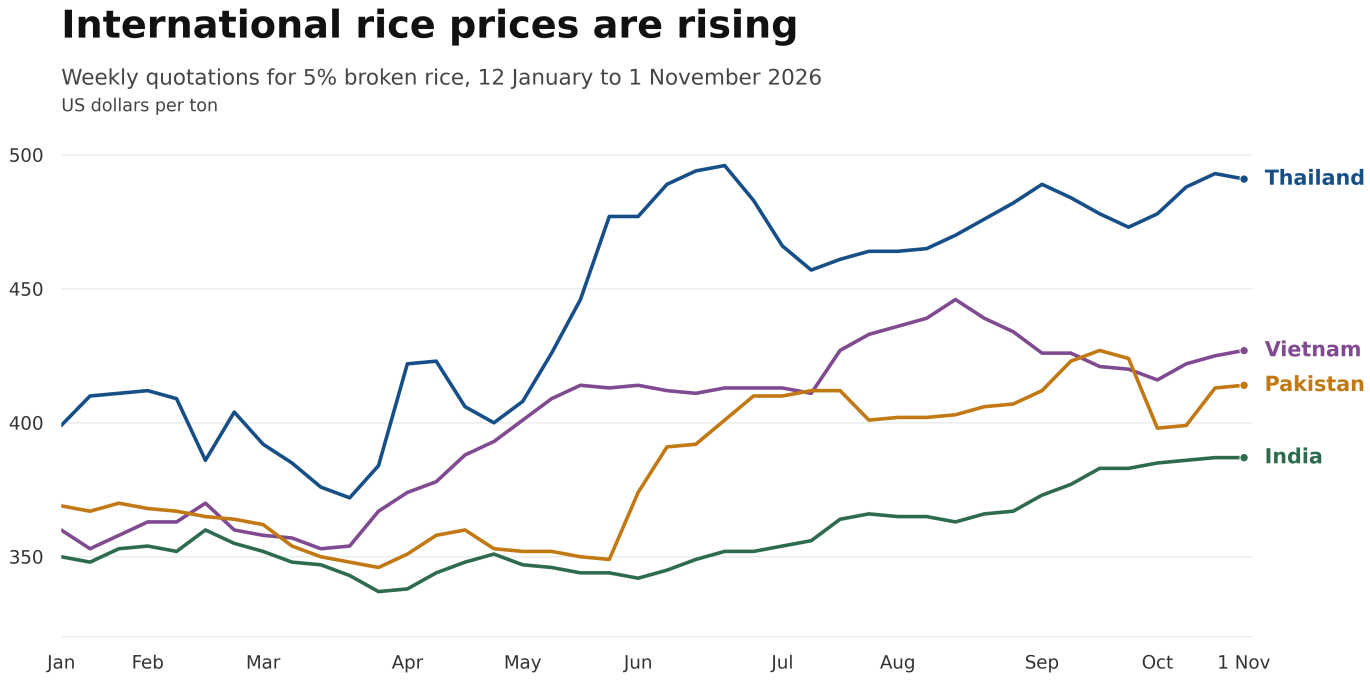
Reduced harvested area and disruptions in crop management practices are important channels through which these pressures affect output. For Thailand, ASEAN Food Security Information System (AFSIS) links reduced planting and crop maintenance to higher fertilizer, pesticide, and fuel costs; the Thai Rice Exporters Association similarly identifies high cultivation costs and low yields as constraints on competitiveness.[2, 10] The United States illustrates how sharply production can contract through reduced acreage: output is forecast to fall 23.7% from 2025 despite yields increasing by 2%, with harvested area at its lowest since 1972/73.[1] USA Rice's October statement reinforces the concern over operating costs, reporting that farmers have faced higher fuel prices since spring planting.[11] Weather damage is also evident: Cambodia's agriculture ministry reported 98,662 hectares of rice damaged by flooding by 16 October.[12] In the Philippines, the Department of Agriculture attributes the production contraction to reduced harvested area, costly inputs, delayed planting, irrigation constraints and monsoon disturbances, while expecting the larger El Niño effects during the first half of 2027.[13]

High input costs can weaken planting incentives even when rice prices rise. International urea prices had largely reversed their earlier surge by October, falling from an April peak of 106.3% above January 2026 to just 1.1% above that baseline. Other international benchmarks, however, remain elevated: diammonium phosphate was 29.7% higher and Brent crude 87.1% higher.[14]



Domestic prices show why an easing of international input prices may not bring equivalent relief to farmers. Philippine retail prices for granular urea rose 36.8% between January and late October. Myanmar's reference urea price and Thailand's wholesale urea price increased by 27.7% and 17.9%, respectively, through September.[7, 15- 17] China recorded a smaller increase of 0.3% through October, while the subsidized or official prices shown for India, Indonesia, and Bangladesh remained unchanged.[5, 18-24] Such price protection shifts the higher costs to public budgets, but its benefit for farmers depends on timely availability of inputs at the stated prices. Diesel also remained more expensive across many rice economies. Indonesia's diesel price rose 75.2% from January to October. Diesel rose 69.0% in Vietnam and 67.8% in the Philippines.[25-32]

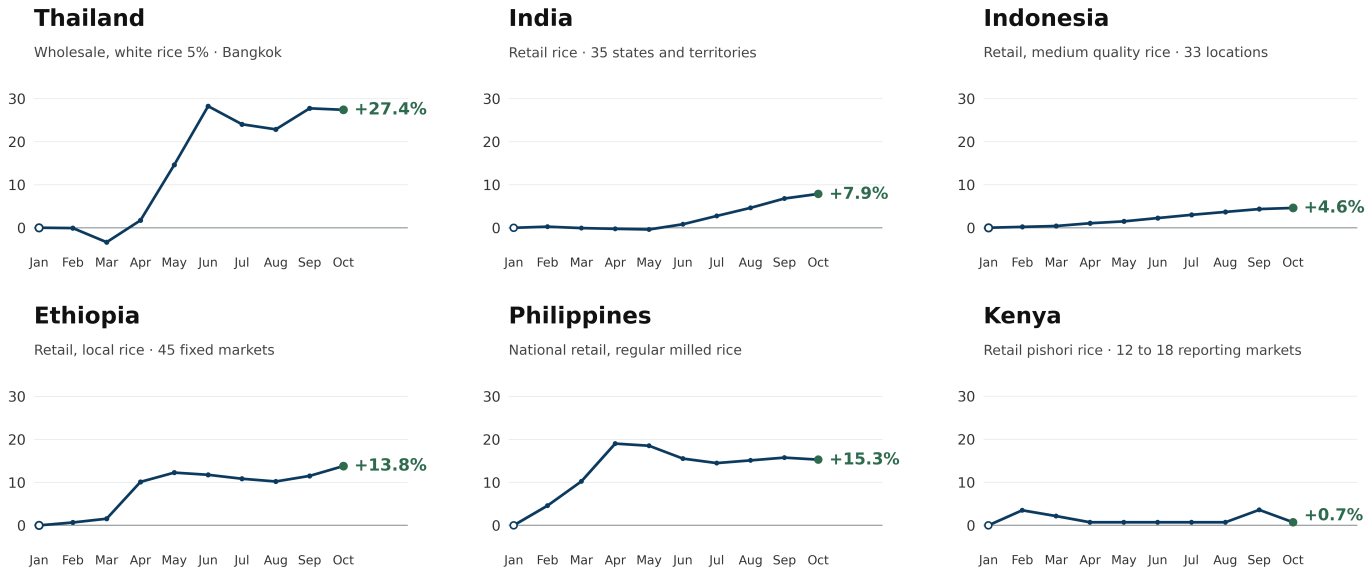
International and domestic rice prices are rising. The FAO All Rice Price Index rose 1.6% in October to 112.3 points, 14.1% above a year earlier. The quotations for 5% broken rice, shown below for top four exporters, increased between January and 1 November 2026, although the timing and scale of the increases differed.[33] Thailand recorded the overall rise from below US$380 per ton in March to almost US$500 in June and ending near US$490 in early November. Vietnam's quotations strengthened from April, peaked at about US$445 in August, and subsequently eased before recovering to around US$425 by early November. Pakistan's prices rose sharply in June and reached about US$425 in September, followed by a pronounced October decline and a partial recovery to around US$415. India showed a more gradual increase from June onward, ending close to US$390 per ton, compared with about US$350 in January. Increasing divergence across these price movements is due to harvest timings, local demand, exchange rate dynamics, and importer regulations, alongside production prospects. The evidence therefore supports several interacting pressures rather than a single El Niño explanation behind these price movements.



Domestic price pressures also differ in scale and timing. By October, Bangkok wholesale rice prices were 27.4% above January.[36] In the Philippines, regular milled rice rose from PHP 43.29 per kilogram at retail in January to a peak of PHP 51.51 in April. It eased to PHP 49.90 in October, 15.3% above January.[3] Ethiopian retail prices rose sharply in April and May, declined modestly through August, and recovered to finish 13.8% higher.[37] In Kenya, the median retail price of pishori rice across reporting markets was KSh 175 per kilogram in October, 0.7% above January.[38] In India, reported retail rice prices across 35 states and union territories changed little through May before rising to INR 47.59 per kilogram on 1–15 October, 7.9% above the January average of INR 44.11.[39] Indonesia showed the most gradual and consistent rise, with retail prices ending 4.6% above their January level.[40]

Domestic rice prices in selected markets

Monthly percentage change from January 2026 · January = 0

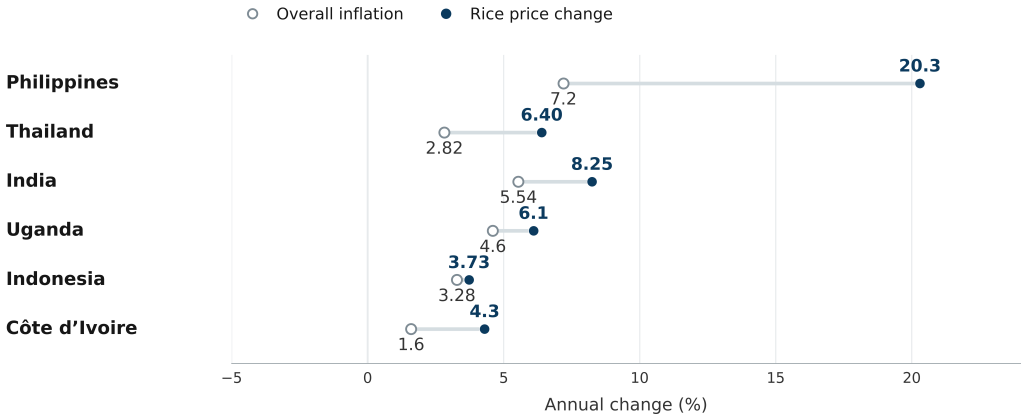


Prices are in local currency. Rice grades, trade stages and market coverage differ.

Rice inflation puts poorer households under greater pressure. Rice is one element of the consumer price index, but its importance to daily food consumption across Asia and parts of Africa makes its price movement especially consequential. Rice prices rose faster than overall consumer prices in several of the markets shown in September 2026.[41] In the Philippines, rice prices rose by 20.3% over the year compared with overall inflation of 7.2%.[3] India recorded rice inflation of 8.25% against overall inflation of 5.54%, while Thailand's corresponding rates were 6.40% and 2.82%.[40, 42-45] In Uganda, rice prices rose 6.1% over the year, compared with overall inflation of 4.6%.[44] In Côte d'Ivoire, the national average retail price of local rice rose 4.3%, from CFAF 575 to CFAF 600 per kilogram over the same period. Overall inflation was 1.6%.[46] The broader concern is that poorer households devote a larger share of their income to food purchases than better-off households, hence, will be more negatively affected by food price increases.

Rice and overall inflation in selected countries

September 2026 | Year-on-year change in consumer prices (%)



Uganda: urban CPI coverage. India's rice item excludes Public Distribution System rice. Country baskets and rice coverage differ.
Côte d'Ivoire: change in the national average retail price of local rice.

Preparing for the next season

The next planting cycle remains exposed to weather risk. Substantial rice stocks provide a buffer against production shortfalls and give governments time to prepare. USDA projects global ending stocks in 2026/27 at 198.5 million tons, 2.8% below 2025/26 and equivalent to 36.8% of projected use.[1] The buffering effect for individual countries and households, however, depends on where stocks are held, how readily they can be released, and whether affordable supplies can reach consumers in a timely manner. National procurement and stock management therefore remain essential.

The immediate concern is for rice planted or grown in late 2026 and early 2027. NOAA's October outlook assigns a 100% probability to El Niño in January-March 2027, 85% in March-May and 17% in May-July, when neutral conditions have a 70% probability.[47]

Policy priorities for the coming months:

- **Protect the next crop by ensuring access to inputs.** Before late-2026 and early-2027 planting, assess irrigation reliability, repair critical pumps and canals, and align planting advice with local forecasts. Target seasonal credit, timely fertilizer delivery, and appropriate seed to areas where water and input constraints threaten viable production. Support efficient application rather than fertilizer volume alone.
- **Prepare assistance to vulnerable poor households.** Review safety nets and support arrangements for poor households before further price increases erode their purchasing power. Where food is available and payments can reach eligible households promptly, temporary cash transfers can help protect purchasing power. Set transfer amounts against local food costs and review them as prices change. Where supplies or market access are disrupted, direct food assistance may be more effective.[48]
- **Keep import, export, and distribution channels dependable.** Communicate import and export procedures, tariff review dates, and any adjustment triggers early enough for contracting and shipping. Diversify commercially viable origins, grades, and transport options. Treat memoranda of understanding and offers as only potential supply sources until contracts, financing, and delivery schedules are secured.
- **Use stocks and market information to reduce uncertainty.** Publish usable stocks by location, grade and ownership category, alongside procurement and release plans. Monitor farmgate, wholesale and retail spreads, landed import costs and delivery delays. Large aggregate stocks offer less protection when the rice is inaccessible, unsuitable or costly to move.
- **Design response triggers in advance before conditions worsen.** Track rainfall, reservoir levels, planted area, input deliveries and prices alongside low-income household inflation. Use these indicators to trigger locally appropriate water measures, temporary assistance, and supply responses. Record program costs and benefits so support can be adjusted as harvest and climate information improves.

Sources: 1. US Department of Agriculture (9 Oct 2026a; 9 Oct 2026b; 14 Oct 2026a; 14 Oct 2026b). For the production figure, USDA sources cover India (9 October WASDE), Nigeria and Tanzania (14 October), and the United States (9 October National Agricultural Statistics Service). **2.** ASEAN Food Security Information System (Oct 2026). **3.** Philippine Statistics Authority (22 Jan 2026; 16 Feb 2026; 17 Apr 2026; 29 May 2026; 17 Jul 2026; 17 Aug 2026; 18 Sep 2026; 6 Oct 2026a; 6 Oct 2026b; 16 Oct 2026, monthly retail rice prices; 4 Nov 2026a; 4 Nov 2026b). The Philippine production figure uses the authors' calculation from Philippine Statistics Authority data. **4.** FCA / MNFSR (7 Oct 2026). **5.** National Bureau of Statistics, China (14 Jan 2026; 21 Aug 2026; 4 Nov 2026). **6.** Đại biểu Nhân dân (4 Nov 2026). The Vietnam production figure uses data from Vietnam's Ministry of Agriculture and Environment, reported by Đại biểu Nhân dân. **7.** Ministry of Agriculture and Cooperatives / Office of Agricultural Economics, Thailand (4 Nov 2026; n.d.). **8.** Conab (15 Oct 2026). **9.** BPS (2 Nov 2026). **10.** Thailand Department of Foreign Trade (21 Oct 2026). **11.** USA Rice Federation, "Rice farmers to benefit from Trump administration's harvest fuel relief program," 20 October 2026. **12.** CamboJA News (18 Oct 2026). **13.** Philippine Department of Agriculture (4 Nov 2026). **14.** World Bank (Aug 2014; 3 Feb 2026; 4 May 2026; 4 Aug 2026; 3 Nov 2026). **15.** Fertilizer and Pesticide Authority (5–9 Jan 2026; 26–30 Oct 2026). **16.** Myanmar Digital News (19 May 2026). **17.** Global New Light of Myanmar (4 Sep 2026). **18.** Press Information Bureau, India (28 Sep 2026). **19.** Financial Express, India (19 Oct 2026). **20.** Pupuk Indonesia (6 Jan 2026). **21.** Ministry of Agriculture, Indonesia (20 Oct 2026). **22.** Ministry of Agriculture, Bangladesh (n.d.). **23.** Bangladesh Sangbad Sangstha (15 Sep 2026). **24.** Amar Desh (10 Oct 2026). **25.** Fortune Indonesia (29 Jan 2026; 12 Oct 2026). **26.** Government News, Vietnam (22 Jan 2026). **27.** Ministry of Industry and Trade, Vietnam (15 Oct 2026). **28.** Department of Energy, Philippines (6–12 Oct 2026a; 6–12 Oct 2026b; 6–12 Oct 2026c; n.d., Metro Manila pump prices). **29.** Petroleum Planning and Analysis Cell (4 Nov 2026). **30.** Energy Policy and Planning Office, Thailand (7 Jan 2026; 21 Oct 2026). **31.** EWURA (7 Jan 2026; 7 Oct 2026). **32.** The Financial Express, Bangladesh (1 Jan 2026; 30 Sep 2026). **33.** International rice prices, weekly quotations for 5% broken rice, 12 January to 1 November 2026. Compiled from various sources. **34.** Agricultural Market Information System, Market Monitor No. 142, October 2026, p. 8. **35.** FAO, Food Price Monitoring and Analysis, international cereal prices, 12 November 2026. **36.** Department of Internal Trade, Ministry of Commerce, Thailand (n.d.). **37.** National Market Information System (NMIS), Ethiopia (n.d.). **38.** SAFIC AgriIntel, Kenya Ministry of Agriculture market information system (retail pishori rice, January–October 2026). **39.** Department of Consumer Affairs, Price Monitoring Division, India (n.d.). **40.** Bank Indonesia (1 Oct 2026; n.d.). **41.** Sources for the September inflation figure: Philippine Statistics Authority, India's Ministry of Statistics and Programme Implementation, Thailand's Trade Policy and Strategy Office, Statistics Indonesia (BPS), Uganda Bureau of Statistics, Bank Indonesia, Indonesia's National Food Agency (Bapanas), and Côte d'Ivoire's Agence Nationale de la Statistique (ANStat). **42.** Ministry of Statistics and Programme Implementation (12 Oct 2026a; 12 Oct 2026b). **43.** Trade Policy and Strategy Office (6 Oct 2026a; 6 Oct 2026b). **44.** Uganda Bureau of Statistics (30 Sep 2026). **45.** Badan Pangan Nasional (29 Oct 2026). **46.** Agence Nationale de la Statistique, Côte d'Ivoire, harmonised consumer price bulletins (September 2025, Table 4, October 2026, Tables 2 and 4, September observations). **47.** NOAA Climate Prediction Center (Oct 2026; 8 Oct 2026). **48.** Gentilini, U. (2016) (Revisiting the "Cash versus Food" Debate).

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About the Authors:

Alisher Mirzabaev is a Senior Scientist in Policy Analysis and Climate Change at the International Rice Research Institute (IRRI). His research spans rice agri-food systems, rice markets, economics of land degradation and climate change with over 150 scientific publications.

Valerien Pede is a Senior Agricultural Economist at IRRI and currently serves as Head of the Transformative Policies & Investments (TPI) Unit. His research covers spatial econometrics and regional analysis, impact evaluation of agricultural technologies, foresight and policy analysis, commodity price dynamics, and the intersections of climate change, food security, and poverty.

Building Resilience Together

Building resilient rice systems requires coordinated action across policy, research, finance, and markets. IRRI works with policymakers, development partners, investors, and industry leaders to strengthen rice systems through science-based innovation, capacity development, and evidence-based policy solutions. Explore opportunities to collaborate at irri.org or email us at info@irri.org.