Required Report: Required - Public Distribution **Date:** August 07, 2026

Report Number: TH2026-0026

Report Name: Grain and Feed Monthly

Country: Thailand

Post: Bangkok

Report Category: Grain and Feed

Prepared By: Mana-anya Iemsam-arng, Agricultural Specialist

Approved By: Victorino Floro

Report Highlights:

Thai rice exports are firmly in recovery. African buyers now take the largest share of shipments, while steady orders from ASEAN markets, particularly Malaysia and the Philippines, driven by El Niño stockpiling, have kept the pace strong through July. Export prices softened before regaining ground in most grades of rice, with only the lowest grades still under pressure from cheaper Indian supply. On the supply side, rainfall remains below normal across the main rice-growing regions, reservoir levels trail last year by a wide margin. This season's water allocation from major reservoirs for the Chao Phraya basin reaches low levels and forecasters expect El Niño to strengthen further through year-end.

Market Update

African and Southeast Asian buyers have progressively filled the gap left by Iraq, normally Thailand's largest single market at around 1.0 million metric tons annually. Iraqi imports totaled only 90,000 MT from January to May this year. Africa now absorbs 41 percent of Thai rice exports, led by South Africa (43,000 MT), while Malaysia (24,000 MT) and the Philippines (21,000 MT) anchor the Asian recovery. White rice leads the export mix at 45 percent of volume, ahead of Hom Mali rice (26 percent) and parboiled rice (19 percent). Import demand remains stable as Thai exporters fulfill forward sales contracted during the May–June El Niño stockpiling wave. Export volumes moderated in late July, suggesting the market is settling into a steadier trend.

From end-June to July 27, 5 percent grade white rice prices moved from \$467/MT to \$441/MT, with the same pattern, a mid-July trough followed by partial recovery, across parboiled rice prices. The exception is WR 25%, which declined steadily to \$421/MT without rebounding, evidence that Indian competition continues to cap the lower-grade segment.

The Royal Irrigation Department (RID) released its assessment on July 31, 2026, flagging water supply as the central risk facing next year's rice crop. Nationwide rainfall from January 1 to July 26 came in 10 percent below normal, with the sharpest shortfalls in three regions that together produce most of Thailand's main-crop rice: the Central region (−19 percent), the East (−18 percent), and the Northeast (−10 percent). In response, RID has formally warned of dry-spell conditions and is prioritizing water supply for human consumption, cities and towns, as the first priority, over irrigation for farms.

Table 1: Average Export Prices (FOB) for Various Grades of Thai Rice (\$/MT)

Grade	June 30	Jul 7	Jul 14	Jul 21	Jul 27
F WR 100 B	1,173	1,165	1,160	1,148	1,146
WR 100 B	485	466	451	462	461
PB 100%	462	455	441	453	447
PB 5%	457	449	436	447	441
WR 5%	467	447	432	442	441
WR 25%	442	434	422	423	421
Exchange rate \$1=	33.1	33.14	33.33	33.48	33.39

Sources: Average actual prices as shared by exporters. Exchange rate: Bangkok of Thailand

Table 2: Weekly Rice Exports (Excluding Hom Mali Fragrant Rice)

Week Ending	Quantity	4-WK AVG	Year to Date	Year to Date in 2025	% Change from Last Year
	(MT)	(MT)	(TMT)	(TMT)	(%)
May 24, 2026	117,716	100,691	1,829	2,471	(26.0)
May 31, 2026	134,673	116,119	1,964	2,609	(24.7)
Jun 7, 2026	76,793	110,051	2,041	2,741	(25.5)
Jun 14, 2026	109,781	109,741	2,150	2,864	(24.9)
Jun 21, 2026	122,039	110,821	2,272	2,978	(23.7)
Jun 28, 2026	123,570	108,046	2,396	3,062	(21.8)
Jul 5, 2026	199,999	118,847	2,516	3,168	(20.6)
Jul 12, 2026	95,722	115,332	2,612	3,271	(20.1)
Jul 19, 2026	96,059	108,838	2,708	3,381	(19.9)
Jul 26, 2026	117,403	107,296	2,825	3,509	(19.5)

Source: Board of Trade of Thailand

End of report.

Attachments:

No Attachments