

RICE IMPORT AND INDONESIA'S COMMITMENT TO FREE TRADE COOPERATION (2018-2023)

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Abstract

The high demand for rice in Indonesia is not matched by adequate rice stocks. Coupled with high production costs, the government tends to prefer importing rice to meet domestic demand. Various agreements have been made with trading partners to meet domestic rice supply. Indonesia has entered into various rice trade agreements with its five main trading partners. However, imports do not necessarily solve the problems in Indonesia's rice supply chain. This study aims to analyze the impact of rice import cooperation on food sovereignty in Indonesia. This is a qualitative study with an emphasis on a case study approach. Data was obtained through a literature study from various primary and secondary sources. The results of the study show that Indonesia's rice import cooperation with trading partner countries is a mutually beneficial cooperation. This cooperation is Indonesia's commitment to free trade under the WTO agreement.

Keywords: Commitment, Free Trade Cooperation, Indonesia, Rice Import

INTRODUCTION

Rice consumption in Indonesia increases every year, indicating that Indonesia's rice demand is on the rise. The majority of Indonesians consume rice, and the rapid population growth has led to high rice consumption in Indonesia (bulog.co.id, 2024). Ironically, as an agricultural country, Indonesia's rice consumption needs are still largely met by imported rice. The government states that rice imports are necessary to maintain availability and price stability, in addition to the fluctuating national rice production. In 2023, Bulog, a state-owned enterprise authorized to maintain rice stocks and conduct exports and imports, was unable to optimally absorb grain or rice from farmers due to high prices (unnes.ac.id, 2024).

Indonesia is the second-largest rice importer in the world after the Philippines. In 2024, Indonesia's rice import volume reached 3.85 million tons (GoodStats, 2024). Compared to the previous year, there was an increase of 52%. This figure is quite large compared to the increase in rice imports over the past five years.

Looking at the graph, there has been an increase in national rice demand, while national

rice production has been unable to meet domestic demand. Therefore, the government has met this demand through rice imports. In 2024, there were five main rice exporting countries to Indonesia, namely Thailand, Vietnam, Myanmar, Pakistan, and India. These five countries dominate rice exports, although their positions vary. For example, in 2014, Thailand was Indonesia's main rice exporter, followed by India, Pakistan, Vietnam, and Myanmar. These changes are influenced by the amount of rice supplied by exporting countries.

The Indonesian government has established bilateral cooperation with rice- importing countries. The aim is to ensure the stability of Indonesia's domestic rice supply even in the event of crop failure. In early 2007, Indonesia and Thailand agreed on a memorandum of understanding (MoU) on rice procurement of up to 1.5 million tons per year (Setneg, 2008). This MoU aims to ensure the availability of rice for Indonesia.

Although Indonesia experienced a rice surplus in 2013, in reality, even during the surplus, Indonesia still imported rice from Vietnam. Geographically, Indonesia has high rainfall, which is sufficient to fertilize the soil and grow various types of crops quickly. However, the rice problem is always solved through imports, which does not actually solve the problem. The existence of imported rice does not necessarily prevent rice prices from rising, as evidenced by the fact that rice prices have increased from year to year (Putri, 2023). Rice imports are not a solution for farmers, as they still have difficulty accessing fertilizers, pesticides, and fuel. The high prices of these inputs increase production costs, compounded by extreme weather that often causes crop failures (Putri, 2023). Although the government has budgeted more than Rp 30 trillion for fertilizer subsidies, the distribution of subsidies has not been effective (Suci, 2018). Compared to Vietnam, where production costs are Rp 1,679 per kg, rice production costs in Indonesia are three times higher, or around Rp 4,079 per kg (Suci, 2018). This is what causes imported rice to be cheaper than local rice. In addition, problems are also found at the distribution level, where speculators, middlemen, and large traders often take advantage of conditions when demand is high by withholding rice production, causing rice prices to spike (KAB Corner, 2015).

METHODOLOGY

This study uses a qualitative method supported by literature review. The approach used is a case study of rice imports in Indonesia. In this study, there are two variables used for analysis so that the researcher can obtain information about them and draw conclusions (Sugiyono, 2017). These variables are independent variables, which are variables that influence, and dependent variables, which are variables that are influenced. Based on the title of the study, "The Impact of Rice Import Cooperation on Food Sovereignty in Indonesia," the independent variable used by the author is the

impact of import cooperation, while the dependent variable is Indonesia's food sovereignty.

The data collection technique used in this study was the documentation method. The documentation technique was carried out by collecting data from documents (document-based research). The documents were taken from primary and secondary documents. Primary documents were obtained from the Ministry of Foreign Affairs, Trade Map, Ministry of Trade, and BPS. Meanwhile, secondary documents were obtained from journal articles, news, and reports.

Data analysis was carried out in three ways, namely data condensation, data presentation, and conclusion drawing (Miles, Huberman, & Saldana, 2014). Data condensation was carried out by selecting, focusing the research, simplifying, abstracting, and converting data from interviews, documents, and empirical data. In this stage, the researcher processes the data to make it robust (Miles, Huberman, & Saldana, 2014). The researcher will transform the data on rice import cooperation for analysis using the theoretical framework of food sovereignty. In the presentation stage, the data will be presented using tables and graphs for analysis. Next, conclusions are drawn at the final stage of the research after going through the condensation and data presentation stages.

RESULTS AND DISCUSSION

Indonesia's Rice Import Cooperation with Five Rice Importing Countries

High rice demand is not matched by sufficient production, prompting the Indonesian government to cooperate with several rice producers. Indonesia imports rice because it is considered more effective, given that the price of local rice production is relatively higher than rice from other countries. Thus, imports will minimize the increase in rice prices. The following are the rice import cooperation agreements that have been established by the Indonesian government:

India

Agricultural products are a key agenda item in India's cooperation with Indonesia, particularly rice, which holds a strategic position in this collaboration. As a country with a large population, Indonesia faces the challenge of ensuring that domestic rice needs are met amid global uncertainty. This makes India a strategic trading partner for Indonesia, considering that India is the second largest country after China with rice production reaching 260.73 million tons in 2023 (Our World in Data, 2023). This large rice production capacity can strengthen cooperation between the two parties. Indonesia can meet domestic demand and stabilize rice prices, while India benefits economically through increased export value.

This trade relationship places Indonesia as India's sixth largest trading partner, with 63% of India's exports ending up in Indonesia (Sharma & Sharma, 2024). The ease of exporting and importing is supported by the ASEAN-India Free Trade Agreement (AFTA) and the ASEAN-India Trade

in Goods and Services Agreements (AITIGA) (Amanta & Aprilianti, 2020). These agreements regulate the reduction of tariff and non-tariff barriers and seek to increase trade access with partner countries. The strengthening of the formal cooperation framework was also carried out through the 5th meeting of the joint commission in 2018. This meeting was attended by the Indonesian Minister of Foreign Affairs, Retno L.P. Marsudi, and the Indian Minister of External Affairs, Sushma Swaraj, to discuss concrete economic cooperation through the agricultural sector (Embassy of India, 2018).

However, the uncertain dynamics of global trade policy present new challenges in implementing rice export-import cooperation. One of these is India's implementation of new tariff policies on *crude palm oil* (CPO) and refined, bleached, deodorized, and new palm oil (RBDPO) products. These two products are Indonesia's leading exports to India. The tariffs set at 40% for CPO and 50% for RBDPO in 2019 (Karim & Tiffani, 2023). Indirectly, the tariff policy issued by India has influenced the intensity of rice imports from India. This is because during the negotiation process, rice was one of the products considered in order to reach a mutually beneficial agreement. India will lower the tariffs on CPO and RBDPO on the condition that Indonesia imports rice and sugar from India (Widyamurti & Pamungkas, 2019).

This policy became the final decision in resolving the issue of India's new tariff policy. Indonesia benefits from the reduction in CPO and RBDPO tariffs, which are Indonesia's leading products, so that these products can remain competitive in India. Conversely, India benefits from the agreement that Indonesia must import rice and sugar, which contributes to India's export value. Indonesia agreed to this decision because it still needs rice supplies to meet domestic demand amid the threat of El Nino and Covid-19 throughout the 2018- 2023 period. Table 1.2 shows the amount of rice imports from India from 2018 to 2023.

Table 1. Rice Imports from India (in tons)

2018	2019	2020	2021	2022	2023
337,999	7,741.1	10,594.4	207,245	178,534	69,715.8

Source: compiled by researchers from WITS World Bank, 2025

The data in Table 1.2 shows fluctuations in the volume of rice imports from India to Indonesia over the past six years. In 2018, the volume of rice imports reached 337.999 million tons, indicating Indonesia's high demand for rice. The import volume declined again in 2019- 2020 due to the Covid-19 pandemic and *lockdown* policies. However, this year Indonesia has an agreement with India to import rice and sugar, so that in 2021 the rice volume will increase again to 207,245 million tons. Then, in 2022-2023, there was a decline in rice import volume. This occurred due to a long drought caused by El Nino, which led several countries to restrict exports to secure domestic needs, one of which was India (Saragih, 2023).

Thailand

Indonesia and Thailand are two Southeast Asian countries that have positive bilateral relations. These two countries continue to develop economic cooperation to maintain economic stability, improve people's welfare, and strengthen political relations within ASEAN (Muhlis et al., 2021), one of which is through rice trade. Bilateral cooperation was also initiated through the signing of a *Memorandum of Understanding* (MoU) to enhance cooperation in the agricultural sector. Through this cooperation, Indonesia and Thailand can strengthen bilateral relations—in the context of trade—and encourage the availability of rice in Indonesia, as well as boost economic growth in both countries (Rohim & Ramadhony, 2025). In addition, Indonesia's rice trade with Thailand has an overall objective, namely to promote ASEAN as the center of world rice trade.

Rice, in the context of trade, is a strategic commodity because it has high economic value and is a staple food for the people of Indonesia and Thailand. Apart from high consumption needs, these two countries also share similar characteristics in the rice farming sector, ranging from similarities in geography, climate, and soil type, which allow rice to grow well. This makes Indonesia the fourth largest rice producer and Thailand the sixth largest rice producer in the world (World Population Review, 2025).

However, Thailand is the second-largest exporter according to *the International Rice Research Institute* (IRRI), with exports reaching 11 million tons in 2018 (Muhlis et al., 2021). Meanwhile, Indonesia is the largest importer of rice from Thailand, with exports reaching 2,498,145.7 million tons between 2017 and 2023 (Khairunnisa et al., 2024). Table 1.3 shows the amount of rice imported by Indonesia from Thailand between 2018 and 2023.

Table 2. Amount of Rice Imports from Thailand (tons)

2018	2019	2020	2021	2022	2023
795,600	53,203	88,593.1	63,660	80,182.5	1,381,920

Source: processed by data researchers from WTTS World Bank, 2025

Based on Table 1.3, the increase in rice imports from Thailand occurred in 2023, reaching 1,381,920 million tons. This increase occurred because many rice exporting countries to Indonesia experienced a decline in rice production due to El Nino (Saragih, 2023). This phenomenon forced Indonesia to look for other exporting countries to anticipate a food crisis. Then, in 2019 and 2020, Indonesia imported a small amount of rice from Thailand because during that period there was a *lockdown* policy due to Covid-19, so Indonesia imported a lot of rice from India.

The rice import policy is one of the fastest ways to overcome domestic rice availability issues and is an instrument for achieving food security. This policy is supported by the Coordinating Minister for Economic Affairs, Vice President Jusuf Kalla, and President Jokowi, as an effort to fulfill rice reserves and anticipate natural disasters, as well as an effort to stabilize domestic rice prices

(Jalal, 2022). In addition, rice imports from Thailand are also carried out to meet commercial needs, such as cafes, restaurants, and hotels (Rohim & Ramadhony, 2025). Meeting these needs is done through imports because the prices are more competitive than producing it domestically. This is the basis for the decision to import.

Myanmar

Cooperation in the agricultural sector between Indonesia and Myanmar has been established for a long time, reflecting the commitment of both countries in creating food security. Concrete evidence of this cooperation is Indonesia sending two agricultural experts to help Myanmar develop its agricultural sector independently. These experts were sent in 2018 with the aim of supporting capacity building in the agricultural sector and strengthening bilateral cooperation between the two countries (Wulandari, 2018). The success of this cooperation can be seen in Myanmar's ability to export agricultural products to Indonesia. One of the agricultural commodities exported by Myanmar to Indonesia is rice, which is a staple food in this Southeast Asian country.

According to *the Ministry of Agriculture, Livestock, and Irrigation* (MOALI), Myanmar allocates 10-15% of its rice production for export (Diao et al., 2024). This figure shows that rice is an important commodity that can drive national economic growth, in addition to meeting domestic needs. Approximately 415,186 thousand tons of Myanmar rice were shipped to Indonesia in the 2018-2023 period. Indonesia has become the third largest rice importer from Myanmar. Table 1.5 shows the amount of rice imported by Indonesia from Myanmar.

Table 3. Rice Imports from Myanmar (tons)

2018	2019	2020	2021	2022	2023
41,820	166,701	57,841.4	3,790	3,830	141,204

Source: compiled by data researchers from WITS World Bank, 2025

Based on WITS *World Bank*, in 2019 and 2021, Indonesia imported *broken rice* from Myanmar. This rice is used for industrial needs to produce vermicelli, noodles, rice flour, and/or used as animal feed (Izzul, 2023). In 2021 and 2022, rice imports from Myanmar were smaller than in previous years. This was because Indonesia prioritized rice imports from other countries such as Thailand and India. Then in 2023, there was a significant increase in the volume of rice imports due to India's restriction policy. Trade between Myanmar and Indonesia is facilitated by Myanmar's efforts to liberalize its rice policy in order to ease rice trade channels. The objective of this policy is similar to *the ASEAN Free Trade Agreement* (AFTA), which emphasizes the removal of restrictions on rice exports. Low or zero export tariffs can have an impact on rice prices in the destination country, making them more competitive.

In addition to Indonesia's need for rice commodities, this cooperation also benefits

Indonesia in terms of non-rice export products. Myanmar's limited agricultural equipment has prompted the country to import agricultural equipment from Indonesia. In addition, palm oil is one of Indonesia's leading commodities exported to Myanmar. According to Khine Khine New, *Secretary of the Union of Myanmar Federation of Chambers of Commerce and Industry*, 99% of the palm oil in Myanmar comes from Indonesia (Apriyani, 2023). This shows that this trade cooperation is not only beneficial to one party, but is a strategic cooperation that benefits both parties.

Pakistan

The agricultural sector is essential for the people and the national economy of Pakistan. More than half of Pakistan's population depends on the agricultural sector for their livelihood, from meeting their food needs to as a source of income. In addition, the agricultural sector also plays an important role in the country's economy as it contributes 19.2% to the Gross Domestic Product (GDP) (Ilyas et al., 2022). This contribution to GDP is inseparable from the value of exports made by Pakistan to other countries. One of the agricultural commodities that contributes significantly to Pakistan's GDP is rice, with a value of 0.7% (Ilyas et al., 2022).

In the 2021-2022 period, Pakistan recorded a significant success in domestic rice production, which reached 9.3 million tons (Ilyas et al., 2022). This figure places Pakistan as the ninth largest rice producing country in the world. High rice production not only contributes to domestic food security but also strengthens Pakistan's position on the international stage as the fourth largest rice exporter globally.

Indonesia is one of Pakistan's rice export destinations. The two countries have established bilateral relations since their respective independence. This friendship has developed into a trade relationship represented in *the Indonesia-Pakistan Preferential Trade Agreement (IP-PTA)*. This agreement regulates the establishment of special tariffs aimed at reducing tariff barriers and increasing market access (Republic of Indonesia, 2013). Through this agreement, Indonesia and Pakistan can strengthen trade relations in the agricultural sector, particularly in the rice trade (Amir & Tariq, 2022). Table 1.6 shows the amount of rice imported by Indonesia from Pakistan from 2018 to 2023.

Table 4. Amount of Rice Imports from Pakistan (tons)

2018	2019	2020	2021	2022	2023
310,990	182,376	110,517	52,178	84,407	309,310

Source: compiled by data researchers from WTTS World Bank, 2025

Based on Table 1.6, Indonesia's total imports from Pakistan amounted to 1,049,778 million tons. These rice imports were made to meet Indonesia's domestic needs. Domestic demand that is not accompanied by an increase in production—which has actually declined due to El Niño and the conversion of agricultural land—will lead to a shortage of domestic supply (Putranto, 2023). Imports

are one of the pragmatic solutions to continue meeting Indonesia's basic needs and stabilizing rice prices

Vietnam

Vietnam is a country that has successfully transformed from a rice importer in 1968 to the third largest rice exporter after India and Thailand (Octania, 2021). This transformation was supported by the 1986 Doi Moi policy, which contributed to increased agricultural production, thereby impacting Vietnam's food security (Sri Rahayu, 2020). This success has become an important gateway for Vietnam to reach the global market with exports spread across various countries in Asia, Africa, and several European countries.

However, production alone cannot guarantee Vietnam's smooth market access. Bilateral and multilateral cooperation frameworks between countries are needed to facilitate market access and enable Vietnamese rice to compete competitively. One cooperation framework that has proven effective is the Regional Comprehensive Economic Partnership (RCEP)¹. This agreement can open up market opportunities for Vietnam with the elimination of tariff and non-tariff barriers (Thao & Sang-Hyeon, 2022). The elimination or reduction of tariffs and non-tariff barriers allows Vietnam to export quality rice more efficiently and competitively. As an example of this cooperation, Indonesia has become Vietnam's trading partner with total imports in 2023 reaching 1.15 million tons, making Indonesia the second- largest rice importer after China (Abdurahman & Novindra, 2011).

Indonesia imports rice based on the need for national rice reserves to stabilize rice prices and for the distribution of aid to 21.53 million poor households (Vietnam Trade Portal, n.d.). To meet these needs, Indonesia and Vietnam have bilateral and multilateral cooperation frameworks that play an important role in facilitating the import process. This cooperation allows imported rice prices to be much cheaper than domestic production costs. As a trading partner, Vietnam is committed to supplying rice reserves to Indonesia, which facilitates bilateral trade relations between the two countries (Oktaviana et al., 2023). Vietnam's strong national rice reserves, supported by the government through *Vienna Food*, are a catalyst for the success of this cooperation and Vietnam's commitment to meeting Indonesia's rice needs. Table 1.4 shows the amount of rice imported by Indonesia from Vietnam from 2018 to 2023.

Table 5. Amount of Rice Imports from Vietnam (tons)

2018	2019	2020	2021	2022	2023
767,181	28,258	88,716.4	5,200	81,828	1,145,710

Source: compiled by data researchers from WTTS World Bank, 2025

¹ RCEP members include the 10 ASEAN member countries, Australia, China, Japan, South Korea, New Zealand, and India.

Based on the data in Table 1.4, rice imports from Vietnam can be said to be quite volatile, following global market dynamics. The largest value of rice imports occurred in 2023, reaching 1.15 million tons. The Indonesian government plans to increase this amount by around 2-2.4 million tons to meet demand and provide rice aid (Vietnam Trade Portal, n.d.). Around 51% of Indonesia's total rice imports come from Vietnam because in 2023, Vietnamese rice was cheaper than Thai rice. Vietnamese rice was priced at \$42,464,321.00 for 8.2 thousand tons, while Thai rice was priced at \$44,092,018 for 8.1 thousand tons of rice (Oktaviana et al., 2023). Then, in 2019-2021, Indonesia imported more rice from India and Thailand as its main rice trading partners.

Indonesia's Commitment to Free Trade

Indonesia's cooperation is part of its commitment to free trade through the ratification of the Agreement on Agriculture (AoA), which came into effect on January 1, 1995. In addition, the regional free trade agreement within AFTA came into effect on January 1, 2003, which was followed by the elimination of the Inclusion List (a list of products subject to lower tariffs) in 2010 for ASEAN-6 and in 2018 for Cambodia, Laos, Myanmar, and Vietnam. This cooperation also encourages market liberalization by reducing trade barriers. Although Indonesia had a rice surplus of 1.74 million tons in 2022, the government still imported 501 thousand tons of rice (Lukman & Kusumawardhana, 2023). This was a consequence of Indonesia's commitment to fair trade in its cooperation with other countries. An example of this is the case of trade between India and Indonesia. India will reduce CPO and RBDPO tariffs on the condition that Indonesia imports rice and sugar from India (Widyamurti & Pamungkas, 2019). This means that in this free trade, there are reciprocal actions aimed at benefiting both parties. This trade relationship places Indonesia as India's sixth largest trading partner, accounting for 63% of India's exports to Indonesia (Sharma & Sharma, 2024). The ease of exporting and importing is supported by *the ASEAN-India Free Trade Agreement* (AIFTA) and *the ASEAN-India Trade in Goods and Services Agreements* (AITIGA) (Amanta & Aprilianti, 2020). These agreements regulate the reduction of tariff and non-tariff barriers and seek to increase trade access with partner countries.

A mutually beneficial relationship also exists in the rice trade cooperation between Indonesia and Myanmar. According to *the Ministry of Agriculture, Livestock, and Irrigation* (MOALI), Myanmar allocates 10-15% of its rice production for export (Diao et al., 2024). This figure shows that rice is an important commodity that can drive national economic growth, in addition to meeting domestic needs. Approximately 415,186 thousand tons of Myanmar rice were shipped to Indonesia in the 2018-2023 period. Indonesia has become the third largest rice importer from Myanmar. As a reciprocal relationship, palm oil, which is Indonesia's leading commodity, is imported into Myanmar. According to Khine Khine New, Secretary of the Union of Myanmar Federation of Chambers of Commerce and Industry, 99%

of the palm oil in Myanmar comes from Indonesia (Apriyani, 2023).

However, despite fulfilling the requirements of free trade, namely reducing tariff and non-tariff barriers, each ASEAN member country has its own import control policy. This has been agreed upon in the Common Effective Preferential Tariff (CEPT) mechanism, which allows countries to include products in a list of strategic commodities in order to boost economic growth until an agreed-upon time. Under the CEPT mechanism, Indonesia has included rice in *the high-sensitive list*, which means that rice imports in Indonesia are still subject to tariffs. In 2023, Indonesia will impose a specific tariff of IDR 450 per kg of rice, equivalent to a 5% tariff (Patunru & Ilman, 2020). To assist importers, the government will bear the import duties on rice under the Government-Borne Import Duty provision. One of the objectives of import controls implemented by countries is to protect local farmers.

The government's decision to remove fertilizer subsidies is also a form of Indonesia's commitment to free trade. However, in Lukman's research, Indonesia removed fertilizer subsidies that were not even included in the WTO agricultural agreement commitments (Lukman & Kusumawardhana, 2023).

In 1999, Indonesia reduced the authority of Bulog, which initially regulated the amount of rice import quotas, and then changed its status to a public company, so that rice imports could be carried out by the private sector. This could facilitate the fulfillment of domestic rice stocks and promote food security.

Commitment to free trade cooperation has fostered Indonesia's interdependence with rice-exporting countries. Essentially, this trade is a mutual agreement that provides each country with the opportunity to achieve its interests. Rice import cooperation is *a win-win solution* that Indonesia has implemented to achieve its interests not only in the rice sector but also in other sectors.

CONCLUSION

So far, Indonesia has been able to build good relationships with its trading partners through reciprocal relations. However, it turns out that these reciprocal relations have not been strengthened by improvements in the agricultural system. As a result, every year Indonesia must rely on imported rice to meet its national food needs. Indonesia has not been

able to independently meet its domestic rice needs, with climate issues and other factors being used as reasons by the government to justify imports.

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