UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF THE SECRETARY

Trade Spotlight

SUCCESSES IN SOUTHEAST ASIA

(Southeast Asia is composed of 11 countries: Cambodia, Laos, Myanmar (Burma), Thailand, Vietnam, Brunei, Indonesia, Malaysia, Philippines, Singapore, Timor-Leste)

Fast Facts

- Southeast Asia is the fourth-largest regional destination for U.S. agricultural exports, totaling **$14.2 billion** in 2025.
- Total U.S. agriculture exports to Southeast Asia **increased by 8%** from 2024 to 2025, with bulk agricultural goods increasing by an astounding **28%**.
- Dairy exports have **increased by 7%** in 2026 compared to the first 8 months of 2025, driven by U.S. exports of cheese, lactose, and whey to Indonesia and Singapore.
- Southeast Asia is a growing market for U.S. ethanol driven by the Philippines, which imported a record **$192 million** in 2025, making this the 6th largest destination for U.S. ethanol.
- U.S. meat products are experiencing high levels of export growth in Southeast Asia: comparing the first 8 months of 2026 to 2025, U.S. beef exports are **up by 38 percent** and turkey exports are **up by 49 percent**.
- U.S. corn exports to Southeast Asia reached a record **$501 million** in 2025; already in 2026, U.S. corn exports are **24 percent higher** compared to the same point in 2025.
- U.S. soybean exports reached records in Vietnam and Malaysia in 2025, a combined value of **$873 million**.
- U.S. cotton exports to Southeast Asia nearly doubled in 2025, reaching **$1.6 billion**, and are up an additional 23 percent so far in 2026.
- U.S. tree nut exports to Southeast Asia **increased by 40%** comparing 2025 to 2024 reaching a value of $816 million. So far in 2026, U.S. tree nut exports are already 54% higher compared to the same point in 2025.

SUMMARY

The Trump Administration's trade policies are working to open new markets for U.S. farmers by prioritizing opportunities in Southeast Asia. Secretary Rollins, in partnership with Ambassador Greer, is capitalizing on economic conditions that are prime to import record levels of U.S. agricultural commodities and products. Total U.S. agricultural exports to Southeast Asia increased by 8 percent compared to 2024, with certain countries, like Vietnam, importing significantly more U.S. agricultural products under the Trump Administration. This trade spotlight report, prepared by the Foreign Agricultural Service, highlights why Southeast Asia prefers American agricultural products and explains why this demand is only projected to increase.

Regional Growth Snapshot

Southeast Asia has emerged as the fourth-largest regional destination for U.S. agricultural exports, driven by a rapidly expanding middle class and soaring disposable incomes across key markets like Vietnam, the Philippines, and Indonesia. As populations urbanize, traditional diets are shifting toward Westernized preferences, creating a massive appetite for high-value animal proteins, dairy products, and imported convenience foods.

This demographic transformation directly fuels demand for U.S. bulk commodities like soybeans and animal feed ingredients to support local livestock, alongside premium consumer goods like beef, tree nuts, and fresh fruits. Backed by modern retail infrastructure and digital e-commerce, Southeast Asian consumers increasingly prioritize food safety and premium quality—two areas where high quality U.S. agricultural exports enjoy a stellar reputation.

Total U.S. agricultural exports to Southeast Asia were $14.2 billion in 2025, an 8 percent increase from 2024. The strongest growth in 2025 came from bulk agricultural products, increasing to $5.9 billion from $4.6 billion in 2024. Consumer-oriented products also grew, rising 4 percent to $4.5 billion. Certain countries imported drastically higher amounts of U.S. agricultural products. For example, in 2025, Vietnam was the largest market for U.S. agricultural exports in Southeast Asia, with a total of $4.7 billion, increasing 38 percent from 2024.



Commodity-Specific Growth Areas

Dairy:

U.S. dairy exports to Southeast Asia reached $1.1 billion in 2025, 4 percent higher than 2024. Expanding consumer demand for protein-rich foods and rising incomes have supported U.S. exports. Through August 2026, dairy exports to the region increased 7 percent compared to the same period in 2025 and have been driven by exports of lactose, whey, and cheese to Indonesia and Singapore. Year-to-date dairy exports also increased 162 percent to Cambodia, reaching $5.1 million.

Ethanol:

Southeast Asia is a growing market for U.S. ethanol, driven by the Philippines and Vietnam. In 2025, the Philippines was the sixth largest market for U.S. ethanol, accounting for a record $192 million. Increased ethanol consumption in the Philippines is driven by growing gasoline consumption, limited growth in domestic production, and the introduction of voluntary E20 blending in June 2024. Ethanol demand in Vietnam jumped this summer after the implementation of nationwide E10 blending for one grade of gasoline, and after Vietnam also ended sales of pure fossil gasoline. Due to limited production capacity and feedstock restraints, imports will be required to satisfy about three-fourths of Vietnam fuel ethanol consumption. Vietnam's E10 mandate is expected to create a $400–$500 million annual opportunity for ethanol exports. Longer-term, Indonesia has potential to provide growth opportunities for U.S. ethanol. In April, the Government of Indonesia introduced a new blending mandate roadmap, targeting a regional E10 rollout beginning in 2028. Indonesia has limited ethanol production capacity and feedstock constraints, creating potential opportunities for future ethanol import if the ethanol blending mandate roadmap is realized.

Protein (beef, pork, poultry):

U.S. meat and poultry exports to Southeast Asia were valued at $878 million during 2025. Beef and beef product exports increased 38 percent during January to August 2026 compared to the same period 2025 driven by growth to Indonesia and Vietnam. Turkey meat exports have also climbed 49 percent on rising shipments to Vietnam, Singapore and Cambodia. An expanding middle class and rising incomes bolster animal protein consumption spurring imports as domestic production is challenged to meet increasing demand.



Pet Food:

Global pet food exports to Southeast Asia were $992 million in 2025. The United States was the fourth largest supplier, exporting $59 million and holding a 6 percent market share. The largest importer of U.S. pet food in the region is Singapore. The United States is the second largest pet food exporter to Singapore and witnessed a 14 percent growth in this market from 2024 to 2025. Singapore consumers prefer high-quality, functional, and conventional pet food products. This trend aligns with Singapore's recent economic improvement including stabilizing inflation and rising disposable incomes. Singapore recently lifted housing restrictions on cats, leading to an increase in cat adoptions, contributing to an increase in wet pet food purchases.

Other Commodities (corn, distiller dried grains with solubles (DDGS), soybeans, soybean meal, cotton, tree nuts)

Corn:

U.S. corn exports to Southeast Asia set an all-time record in 2025, with shipments worth just over $501 million. U.S. exports to date in 2026 have reached about $386 million, 24 percent above the same period last year. Almost all the growth has come from higher exports to Vietnam, where competitive U.S. exports have made good inroads against Argentine and Brazilian corn.

DDGS:

U.S DDGS exports to Southeast Asia in 2025 were softer than in prior years; however, year-to-date exports in 2026 have reached $616 million, 53% higher than the same period last year and the highest value to date on record. Strong global ethanol consumption growth has boosted U.S. production of ethanol and co-products like DDGSs, allowing the United States to increase exports to markets like Indonesia and Thailand.



Soybeans:

U.S. soybean exports to Southeast Asia totaled $2.2 billion in 2025, with record exports to Vietnam ($581 million) and Malaysia ($292 million) driven by growing food and feed domestic demand. From January to August 2026, the value of U.S. soybean exports to the region increased 17 percent to nearly $1.4 billion because of higher prices and increased export volumes to Indonesia, Malaysia, and the Philippines.

Soybean Meal:

In 2025, U.S. exports of soybean meal to the region declined 9 percent to nearly $1.4 billion facing steady competition from Brazil and Argentina. However, U.S. soybean meal exports year-to-date (January to August) rose 27 percent to $1.1 billion on increased prices and volume. The Philippines remains the leading market for U.S. soybean meal in the region, with year-to-date exports reaching $833 million accounting for 80 percent of the Philippines' imports.

Cotton:

U.S. cotton exports to Southeast Asia nearly doubled in 2025, reaching $1.6 billion, and are up an additional 23 percent in 2026 from January through August. Vietnam accounted for nearly 80 percent of this trade as U.S. cotton lost market share in China and shifted shipments to spinning mills in Vietnam.

Tree Nuts:

In 2025, U.S. tree nut exports to Southeast Asia rose by more than 40 percent from the previous year to $816 million, and from January through August 2026, exports increased by 54 percent compared to the same period in 2025. Vietnam accounted for over 70 percent of this trade due primarily to direct trade with China shifting to Vietnam in response to retaliatory tariffs. Other rising markets included Thailand and Malaysia on strong growth from the food ingredient, snack food, and confectionary industries.



Drivers of Success

The Southeast Asia success story and upward trajectory is driven by the successful trade deals initiated by the Office of the U.S. Trade Representative in partnership with the U.S. Department of Agriculture. Many Southeast Asian partners like Indonesia, Malaysia, and Cambodia have signed Agreements on Reciprocal Trade, and Vietnam has agreed on a framework. As President Trump works to rebalance trade, ensuring U.S. farmers and ranchers can export their high-quality products on a level playing field around the world is a top priority.

Additionally, several economic factors like increasing populations and higher incomes in Southeast Asia are driving up food demand and, therefore, the potential for U.S. agricultural exports. The Southeast Asian population is projected to increase by 8 percent from 2023 to 2033. Further, the reputation of U.S. agricultural products for quality and safety provides an important competitive advantage. Modern retail, foodservice, tourism, and food processing are expanding the channels through which U.S. agricultural products reach consumers. The growth of supermarkets, hotels, restaurants, tourism, and food manufacturing creates opportunities beyond traditional bulk commodities. This is particularly important for premium products such as beef, dairy, poultry, fresh fruit, tree nuts, prepared foods and food ingredients. At the same time, retail e-commerce is rapidly expanding in Southeast Asian markets, providing more opportunities for consumers to purchase American agricultural goods and products.

The compounding effect of the Trump Administration's trade policies combined with economic conditions in Southeast Asia have led to the growth seen today – and it is only expected to increase. Seizing these opportunities will lead to a brighter export future that will benefit generations to come of American farmers, producers and ranchers. Secretary Rollins has taken and will continue efforts to make Southeast Asia a top customer of high-quality American agricultural products, paving the way for a resilient and dependable marketplace for U.S. farmers.