



Collateral Effects of the Tariff War on ASEAN Food Security

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Executive Summary

This policy report examines the potential collateral effects of the US-China tariff war on the food security of the Association of Southeast Asia Nations (ASEAN) member states, who are third parties to the conflict. Across the six commodities studied – soybeans, maize, wheat, poultry meat, pork, and bovine meat (beef) – China's 10% retaliatory tariffs on the US will likely divert US\$1.16 billion (2.3 million tonnes) of food imports. Brazil, Russia, South Africa, Argentina, Canada, Australia, and New Zealand will feature significantly among China's alternative sources. ASEAN's greatest vulnerabilities lie in soybeans, wheat, and maize, relative to the meat products. The most vulnerable ASEAN countries are those that also import from China's alternative (non-US) sources, as they are likely to face reduced imports, higher import prices, or both. To prepare for potential worse scenarios including a collapse in the trade war truce talks, or sudden import/export surges triggering price instability and trade bans, regional policymakers should prioritise providing sufficient income support to consumers, and helping ASEAN farmers and traders to raise regional production levels, to benefit from higher prices and incomes.

Introduction

Despite the 90-day pause and the reduction in tariff rates between the US and China on 12 May 2025, the stakes in the ongoing tariff war remain high. Southeast Asian countries are “third economies” in this conflict, but are not immune to its effects. These indirect impacts on non-belligerent countries are framed as the collateral effects of the tariff war.

The collateral effects of wars are not straightforward to estimate, but earlier attempts have been made in assessing military wars’ (World Wars I and II) economic impacts¹ and food security impacts (Russia-Ukraine War).² The collateral economic impacts of the earlier 2018-2019 trade war on ASEAN member states, during the first administration of President Donald Trump (2016-2020), were assessed to have a dual effect on ASEAN member states. While the conflict created opportunities to boost ASEAN exports to the US, it also intensified import competition from Chinese exporters for domestic producers.³ But food security is arguably a more pressing existential regional threat, with 36.7% of the ASEAN population being unable to afford a healthy diet,⁴ and where imports are a critical source of food supplies.

This policy report seeks to unravel the collateral effects of the tariff war as an economic conflict on regional food security in Southeast Asia, beginning with the global impacts of China’s import-diversification away from the US. Six key commodities were analysed, namely, crops (soybeans, corn, and wheat) and meats (poultry meat, pork, and beef/other bovine meat), being among the US\$21 billion worth of US agricultural commodities which China placed additional tariffs on in March 2025 as the conflict was escalating.⁵ The report then lays out the impacts on ASEAN countries, followed by further tail risks should the war re-escalate. It then recommends areas to boost regional resilience to such disruptions.

¹ Reuven Glick and Alan M. Taylor, “Collateral Damage: Trade Disruption and the Economic Impact of War,” *Federal Reserve Bank of San Francisco Working Paper 2005-11* (2005).

² Jose M.L. Montesclaros and Margareth Sembiring, “Food Insecurity Beyond Borders: Untangling the Complex Impacts of Ukraine War on Global Food Security,” *NTS Insight No. IN22-03, August* (2022), <https://rsis.edu.sg/rsis-publication/rsis/food-insecurity-beyond-borders-untangling-the-complex-impacts-of-ukraine-war-on-global-food-security/>.

³ Kazunobu Hayakawa, “The trade impact of US-China conflict in Southeast Asia,” *IDE Discussion Paper 873* (2022), Institute of Developing Economies, Japan External Trade Organization (2022).

⁴ FAOStat Database, UN Food and Agriculture Organization, <https://www.fao.org/faostat/en>.

⁵ Colleen Howe and Lewis Jackson, “Which U.S. agricultural products did China hit with tariffs?” *Reuters*, 4 March 2025, <https://www.reuters.com/world/which-us-agricultural-products-did-china-hit-with-tariffs-2025-03-04/>.

Global Food Disruptions from China’s Retaliation

The US is the world’s largest agricultural exporting country,⁶ while China is today the world’s second largest agricultural importer. This report estimates that China’s 10% additional tariffs on US exports in May 2025 (latest negotiated rate at the time of writing)⁷ will trigger a global disruption valued at US\$1.16 billion across the six commodities. This reflects the total amount of US exports to China that will be diverted by the tariff, requiring China to import a comparable amount from alternative sources to meet its consumption needs and prevent food price inflation or shortages.

This estimate is based on the authors’ analysis using the Tariff Simulator by the MIT’s Observatory of Economic Complexity (OEC).⁸ This report also used the International Trade Centre’s (ITC) Trademap Database⁹ to convert the dollar values reported by the OEC Tariff Simulator into total tonnage for each commodity, based on export prices in 2024. In total, 2.3 million tonnes will need to be imported, amounting roughly to Singapore’s total annual food consumption.¹⁰ China’s additional imports for each of the six commodities are detailed in Table 1.

Table 1: Redirected Food Trade to China amidst China’s 10% tariff on US Exports

Commodity	Amount of China's imports from US which are diverted to alternative sources (in USD)	Equivalent Quantity in Tonnage (in Tonnes)
Soybeans	USD 618 million	1.1 million tonnes
Wheat	USD 194 million	615 thousand tonnes
Corn	USD 119 million	441 thousand tonnes
Poultry Meat	USD 9 million	2 thousand tonnes
Pork	USD 191 million	112 thousand tonnes
Bovine meat	USD 25 million	2 thousand tonnes
Total	USD 1156 million	2.3 million tonnes

Source: Authors’ analysis using OEC Tariff Simulator and ITC Trademap Database

⁶ “List of importers for the selected product group, Product group: Agricultural products”, Trademap Database, accessed 15 August 2025, <https://www.trademap.org/>.

⁷ Arendse Huld, “Breaking Down the US-China Trade Tariffs: What’s in Effect Now?” *China Briefing*, 30 June 2025, <https://www.china-briefing.com/news/us-china-tariff-rates-2025/>, accessed 30 June 2025.

⁸ Viktor Stojkoski, Pablo Paladino, Jelmy Hermosilla, and César A. Hidalgo, “The OEC Tariff Simulator (BETA)”, *The Observatory of Economic Complexity*, <https://oec.world/en/tariff-simulator>, accessed 20 June 2025.

⁹ “Trademap: Trade statistics for international business development,” <https://www.trademap.org/>.

¹⁰ Estimated using Singapore population data of 6.4 million (residents and non-residents) (<https://www.population.gov.sg/our-population/population-trends/overall-population/>), and an earlier per-capita consumption of 367 kg/person estimate (Deloitte and AStar, *Environmental Impact of Food in Singapore*, Singapore: Temasek Ecosperity, 2019.)

China's Likely Alternative Sources for Crops and Meats

Brazil, Russia, South Africa, Argentina, Canada, Australia, and New Zealand will likely feature significantly among China's alternative sources for more than one of the six commodities. Table 2 presents the shares per country, based on the authors' analysis using the OEC Tariff Simulator. Integral to these projections is the Tariff Simulator's use of a "bilateral relatedness" model, which considers how countries export more from those with a shared history of trade, and in some cases commonality too in language, culture, and other factors.¹¹

Table 2: China's Alternative Sources for Crops and Meats (in thousand tonnes, t.t.)
2.a Crops Diverted to China

Soybeans		Wheat		Corn	
Brazil	903 t.t.	Canada	267 t.t.	Ukraine	243 t.t.
Argentina	133 t.t.	Australia	237 t.t.	Myanmar	113 t.t.
Canada	60 t.t.	Kazakhstan	71 t.t.	Brazil	30 t.t.
Uruguay	21 t.t.	Russia	17 t.t.	Laos	27 t.t.
Russia	16 t.t.	France	17 t.t.	Russia	12 t.t.
				Bulgaria	5 t.t.
				Germany	3 t.t.
				South Africa	2 t.t.

2.b Meats Diverted to China

Poultry Meat		Pork		Bovine Meat (Frozen)*		Bovine Meat (Fresh/Chilled)*	
Brazil	2 t.t.	Germany	22 t.t.	Brazil	0.8 t.t.	Australia	1,923 t.t.
Argentina	0.2 t.t.	Spain	19 t.t.	Australia	0.5 t.t.	New Zealand	251 t.t.
Chile	0.1 t.t.	Canada	15 t.t.	Uruguay	0.4 t.t.	Canada	47 t.t.
Poland	0.1 t.t.	Denmark	11 t.t.	Argentina	0.4 t.t.	South Africa	16 t.t.
Thailand	0.1 t.t.	Netherlands	9 t.t.	New Zealand	0.3 t.t.		
		Brazil	9 t.t.	Canada	0.1 t.t.		
		France	8 t.t.				
		Ireland	4 t.t.				
		Chile	3 t.t.				
		United Kingdom	3 t.t.				
		Hong Kong	2 t.t.				
		Belgium	1 t.t.				

Source: Authors' analysis using OEC Tariff Simulator and ITC Trademap Database. *Note: The output of the OEC Tariff Simulator is based on the four-digit HS Code, so bovine meat is differentiated between Frozen and Fresh.

¹¹ Bogang Jun, Aamena Alshamsi, Jian Gao, and César A. Hidalgo, "Bilateral relatedness: knowledge diffusion and the evolution of bilateral trade," *Journal of Evolutionary Economics* 30(2020): 247-277.

Collateral Effects on ASEAN Food Security

The collateral food security impacts on Southeast Asia are estimated from the reduced physical availability and affordability of the six key food items (Table 3). Regional vulnerability arises when China's alternative sources overlap with ASEAN countries' key import sources, resulting in increased economic competition for scarce food resources available internationally for exports. The result of increased competition is either reduced availability of food for ASEAN countries to import, increased import prices, or both. The volume of China's imports relative to ASEAN countries is estimated using both the OEC Tariff Simulator and the ITC Trademap database.

Vulnerabilities in Soybeans

Soybeans are a critical commodity for ASEAN producers' livestock and fish feeds, with Vietnam being the second largest pork producer in Asia, Thailand the fourth largest poultry producer, and Indonesia and Vietnam having rapidly growing aquaculture industries.¹² Yet, 93% of soybean inflows into the region are drawn from imports, with only 7% domestically produced (Figure 2). The ASEAN countries most vulnerable to disruptions from China's alternative sourcing are Thailand, which relies on Brazil for almost all of its soybean imports (3.4 million tonnes), and Vietnam, which imports 1 million tonnes (more than half of Vietnam's total imports). Separately, China's potential shift to Argentina for 133 thousand tonnes of soybeans is estimated to have a less severe impact on the Philippines and Vietnam as both countries are less dependent on Argentina for soybean imports.

Vulnerabilities in Maize/Corn

While rice is the most consumed crop in Southeast Asia for food purposes, the second most commonly consumed crop is corn or maize, mostly for livestock feeds. Unlike soybeans, majority (70%) of corn consumption is drawn from domestic regional production, with only 30% imported. ASEAN's imports in 2024 were close to 16 million tonnes. For China to meet its domestic consumption requirements amid its 10% retaliatory tariff on the US, it is expected to import 440 thousand tonnes of corn from alternative sources. Tariff Simulator findings show that China will mostly turn to Ukraine, Myanmar, and Brazil. Vietnam also imports from Ukraine, China's largest alternative source, but the impact on Vietnam is smaller because its key source is Brazil, from which China will import only 30,000 tonnes. China's next source will be Myanmar, but China's expected imports from these countries are small (<150 thousand tonnes) relative to Thailand and the Philippines which import more than 2 million tonnes. Given the region's domestic production of corn and the low overlap between China's top alternative sources and the region's present sources, there is less concern for maize compared with soybeans.

¹² Kelsey Story, Scott Gerlt, and Amanda M. Countryman, "U.S. Soy Exports Could Crush it in the Association of Southeast Asian Nations," *CHOICES*, Agricultural & Applied Economic Association, 2024, <https://www.choicesmagazine.org/choices-magazine/theme-articles/us-agricultural-trade-and-asean/us-soy-exports-could-crush-it-in-the-association-of-southeast-asian-nations>.

Table 3: Intersection of China's Alternative Sources and ASEAN's Existing Sources for Key Commodities

Commodity	China's Anticipated Amount of Surge Imports (Tariff War) (in tonnes)	ASEAN Countries Impacted and amount of Status Quo Imports (pre-Tariff War) (in tonnes)
Soybeans	Brazil (903 thousand)	Thailand (3.4 million), Vietnam (1 million), Malaysia (109 thousand), ASEAN Total: 4.6 million
	Argentina (133 thousand)	Vietnam (32 thousand), Philippines (21 thousand), ASEAN Total: 53 thousand
Corn	Ukraine (243 thousand)	Vietnam (130 thousand), ASEAN Total: 130 thousand
	Myanmar (113 thousand)	Thailand (1.6 million), Philippines (557 thousand), Vietnam (2 thousand), ASEAN Total: 2.2 million
	Brazil (30 thousand)	Vietnam (4.7 million), Philippines (445 thousand), Malaysia (546 thousand), Indonesia (532 thousand), ASEAN Total: 6.2 million
Wheat	Canada (268 thousand)	Indonesia (2.4 million), Vietnam (445 thousand), Philippines (366 thousand), Malaysia (283 thousand), Thailand (240 thousand), Singapore (47 thousand), Myanmar (4 thousand), ASEAN Total: 3.8 million
	Australia (237 thousand)	Indonesia (3.4 million), Philippines (2.6 million), Vietnam (1.1 million), Malaysia (797 thousand), Thailand (690 thousand), Myanmar (232 thousand), Singapore (94 thousand), ASEAN Total: 8.9 million
Poultry	Brazil (210)	Philippines (235 thousand), Singapore (141 thousand), Vietnam (12 thousand), Malaysia (11 thousand), Cambodia (3 thousand), Laos (1 thousand), ASEAN Total: 402 thousand
	Argentina (70)	Vietnam (20 thousand), Singapore (3 thousand), Malaysia (1 thousand), ASEAN Total: 24 thousand
	Thailand (70)	Malaysia (94 thousand), Singapore (9 thousand), Myanmar (5 thousand), Laos (4 thousand), Cambodia (4 thousand), ASEAN Total: 117 thousand
Pork	Germany (22 thousand)	Vietnam (14 thousand), Singapore (6 thousand), ASEAN Total: 20 thousand
	Spain (19 thousand)	Philippines (45 thousand), Malaysia (20 thousand), Thailand (7 thousand), Singapore (6 thousand), Vietnam (4 thousand), Indonesia (360), ASEAN Total: 82 thousand
	Canada (15 thousand)	Philippines (235 thousand), Singapore (141 thousand), Vietnam (12 thousand), Malaysia (11 thousand), Cambodia (3 thousand), Laos (1 thousand), ASEAN Total: 105 thousand
	Denmark (11 thousand)	Philippines (19 thousand), Malaysia (13 thousand), Indonesia (3 thousand), Singapore (1 thousand), ASEAN Total: 36 thousand
Bovine Meats, Frozen	Brazil (700)	Philippines (92 thousand), Singapore (19 thousand), Malaysia (13 thousand), Indonesia (11 thousand), Thailand (3 thousand), ASEAN Total: 139 thousand
	Australia (500)	Indonesia (116 thousand), Philippines (40 thousand), Vietnam (27 thousand), Thailand (17 thousand), Malaysia (12 thousand), Singapore (2 thousand), Brunei (1 thousand), ASEAN Total: 215 thousand
	Uruguay (333)	Singapore (54), ASEAN Total: 54 thousand
Bovine Meats, Fresh	Australia (174)	Thailand (5 thousand), Singapore (4 thousand), Indonesia (3 thousand), Malaysia (2 thousand), Vietnam (1 thousand), Philippines (300), Cambodia (300), ASEAN Total: 17 thousand

Source: Integrative Analysis using OEC Tariff Simulator and ITC Trademap

Vulnerabilities in Wheat

Unlike maize, there is limited production of wheat in ASEAN (mostly in colder north-western regions of Myanmar), with a 99% import dependence (Figures 3 and 4). China's additional imports from Canada (268 thousand tonnes) and Australia (237 thousand tonnes) are small relative to ASEAN's total imports from Canada (~4 million tonnes) and Australia (~9 million tonnes). Nonetheless, Indonesia will likely be most affected, as it is among the largest importers from both Canada and Brazil.

Vulnerabilities in Poultry Meat

China is expected to turn to Brazil, Argentina, and Thailand to replace its foregone poultry imports from the US. Several Southeast Asian nations, including the Philippines, Vietnam, Malaysia, and Singapore, also import from these countries. However, ASEAN is more resilient to this disruption due to its significant domestic poultry meat production, which accounts for 93% of the total supply, with imports making up the remaining 7%. Moreover, the amount that China will import from its alternative sources is dwarfed by regional imports from those sources.

Vulnerabilities in Pork

China's alternative sources for pork are Germany, Spain, Canada, and Denmark. Southeast Asian countries are generally resilient as far as pork imports are concerned since they are only 11% import-dependent, with 89% of total pork inflows drawn from domestic production. Moreover, Germany is the only country where China's expected additional imports exceed those of ASEAN countries (Vietnam and Singapore), though the volume is relatively small at only 22 thousand tonnes. The Philippines, Malaysia, and Indonesia likewise consistently import from China's three other key sources, from which China will draw an even smaller quantity of pork imports in comparison.

Vulnerabilities in Bovine Meat

Southeast Asian countries are generally import-dependent for bovine meat, with 43% of supplies drawn from imports. The most dependent countries are Malaysia (89%), the Philippines (59%), Vietnam (37%), and Indonesia (37%). Majority of China's imports are in frozen bovine meat mainly from Brazil, Argentina, and Uruguay. Despite the region's high dependence on imports, it is not as severely impacted since China's additional imports from its alternative sources (~2 thousand tonnes) make up less than 1% of regional imports (1.1 million tonnes).

ASEAN countries could of course try countering the increased competition from China by redirecting imports to US companies which usually export the affected commodities to China; they could explore other sources too. Redirecting imports to the US may reduce their trade surplus with the US, but doing so could come at higher prices and higher shipping costs too, owing to distance. Renegotiating contracts with the US or exploring alternative sources will take time and may require bilateral trade facilitation, food safety accreditation, and brokering by states. Thus, the growing uncertainty amid the tariff war requires proactive attention by states.

Future Risks

Risk of Re-Escalation of Tariff War

Learning from the 2018-2019 Tariff War, the odds of either the US or China reneging from the trade deal cannot be discounted. This could lead to a re-escalation of the tariff war, with China reverting to its 125% retaliatory tariff on US goods. The Tariff Simulator's results indicate that the economic disruption will likely be upwards of US\$13 billion as trade is diverted to China from alternative, non-US sources. This translates to 22 million tonnes of soybeans, 870 thousand tonnes of wheat, and 917 thousand tonnes of corn, among others.

Table 3: Sensitivity Analysis Results for 125% Tariff Scenario relative to 10% Tariff Scenario

<i>Commodity</i>	<i>Amount of China's imports from US which are diverted to alternative sources (USD)</i>		<i>Equivalent Quantity in Tonnage (Thousand Tonnes, t.t.)</i>	
	<i>10% Tariff</i>	<i>125% Tariff</i>	<i>10% Tariff</i>	<i>125% tariff</i>
Soybeans	USD 618 million	USD 12,502 Million	1,137 t.t.	22,982 t.t.
Wheat	USD 194 million	USD 274 Million	615 t.t.	870 t.t.
Corn	USD 119 million	USD 248 Million	441 t.t.	917 t.t.
Poultry Meat	USD 9 million	USD 24 Million	2 t.t.	6 t.t.
Pork	USD 191 million	USD 555 Million	112 t.t.	325 t.t.
Bovine meat	USD 25 million	USD 79 Million	2 t.t.	8 t.t.
Total	USD 1,156 million	USD 13,682 Million	2,309 t.t.	25,109 t.t.

Source: Analysis using OEC Tariff Simulator and ITC Trademap Database

Further Risk of Export Bans and Upward Price Spirals

Should either the US or China renege and the trade deal collapse, a surge in China's import demand could trigger a rapid decline in food stocks across exporting countries, contributing to rapid domestic food price inflation in those countries. This could force the hand of the exporting countries to raise trade barriers to keep their food prices domestically affordable, as India had done in banning wheat and rice exports after an export surge of five times its monthly exports when the Russia-Ukraine war started in 2022.¹³ The greatest risks lie in Argentina, Hong Kong, and Brazil exports, where the additional demand from China accounts for approximately six months, four months, and two months' worth respectively of the total soybean, pork, and soybean exports of these countries. A further risk, should any country ban its exports, is speculative trading behaviour among both importers and exporters in anticipation of future food price inflation. Similar to the 2007-2008 Global Food Price Crisis, food exporters' profit-seeking stockpiling and importers' sudden large import orders at higher prices could trigger upward price spirals for impacted commodities.

¹³ Jose Ma. Luis Montesclaros, "The Dual Mandate of Food Exporting States: India's Roles in the Global Food Order," RSIS Commentary CO23127, 6 September 2023, <https://rsis.edu.sg/rsis-publication/rsis/the-dual-mandate-of-food-exporting-states-indias-roles-in-the-global-food-order>

Forging Regional Resilience: Addressing ASEAN’s Pre-Existing Food Trade Vulnerabilities

As global tariff wars are beyond ASEAN's control, it should focus on building regional resilience by addressing its pre-existing trade vulnerabilities.

Provide Sufficient Income Support and APTERR Food Relief

Regardless of whether a 10% or 125% China tariff on US goods emerges, food price inflation is to be expected. This calls for expanded income support or food relief. Regionally, it calls for advanced planning to allocate rice relief through the ASEAN Plus Three Emergency Rice Reserve (APTERR) mechanism,¹⁴ given the risk of simultaneous crises amidst natural hazards¹⁵ and ongoing division amidst the Israel-Iran war.

Broaden the Commodities under Regional Reserves

The further risk of export bans and upward price spirals is not new to ASEAN, having been significant players in bringing about the 2007-2008 Global Food Price Crisis. This led to the establishment of the APTERR mechanism to nip such spirals at the bud. Today, it is worth exploring whether such reserves can be expanded to commodities beyond rice. This is especially relevant to the six key commodities impacted by the US-China tariff war, which are mostly sourced from *outside* the region. Figure 1, derived from the ITC Trademap database, depicts that intra-regional sources account for only 17% of maize and 23% of poultry meat, while 99%-100% of the remaining commodities come from outside the region, making them ideal candidates for a coordinated regional reserve.

Figure 1: ASEAN’s Import Dependence on Extra-Regional Source (i.e., non-ASEAN sources)

Product code	Product label	ASEAN's Dependence on Extra-Regional Sources for Imports		
		Value in 2022	Value in 2023	Value in 2024
'1201	Soya beans, whether or not broken	99%	100%	100%
'1001	Wheat and meslin	100%	100%	100%
'1005	Maize or corn	85%	86%	83%
'0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and ...	81%	73%	77%
'0203	Meat of swine, fresh, chilled or frozen	99%	99%	100%
'0201	Meat of bovine animals, fresh or chilled	100%	100%	100%
'0202	Meat of bovine animals, frozen	100%	100%	100%

Source: ITC Trademap Database

¹⁴ ASEAN, “ASEAN Plus Three Emergency Rice Reserve (APTERR),” 2011, <https://aseanplusthree.asean.org/wp-content/uploads/2020/01/ASEAN-Plus-Three-Emergency-Rice-Reserve-Agreement-22.pdf>.

¹⁵ Alistair Cook and Christopher Chen, “Is ASEAN Ready for the Disasters of Tomorrow?” *The Diplomat*, 8 October 2021, <https://thediplomat.com/2021/10/is-asean-ready-for-the-disasters-of-tomorrow/>.

Expand ASEAN's Local Production Potential

The region's food reserve mechanism can be reinforced by expanding local production capacities. An inspiring trend that can be observed in Figure 1 is a growing “nearshoring” of maize and poultry meat towards regional sources. This aligns with the Local Resource-Based Food Reserve initiative, which is being explored today at the ASEAN level,¹⁶ requiring coordinating investments in expanding agricultural production capacities. Such an initiative could significantly reduce vulnerabilities amidst the tariff war by lowering ASEAN countries' dependence on imports. Figure 2 shows the extent of import-dependence of each ASEAN member state where data was available (except Singapore and Brunei). Across the commodities, soybeans and wheat are the ones where there is greatest import-dependence (93%-99%), followed by corn and bovine meat where import-dependence is moderate (30%-43%), and poultry meat and pork where there is least import-dependence (7%-11%).

Figure 2: Southeast Asia Import Dependence for Key Commodities

Country	Import Dependence					
	Soybeans	Corn/Maize	Wheat	Poultry Meat	Pork	Bovine Meat
Cambodia	7%	24%	100%	21%	3%	20%
Indonesia	89%	6%	100%	0%	3%	37%
Lao People's Democratic Republic	17%	4%	100%	10%	2%	7%
Malaysia	100%	99%	99%	10%	23%	89%
Myanmar	11%	1%	79%	0%	0%	5%
Philippines	99%	10%	100%	20%	30%	59%
Thailand	99%	24%	100%	0%	0%	19%
Timor-Leste	67%	0%	100%	86%	31%	0%
Vietnam	97%	70%	100%	18%	4%	37%
Southeast Asia	93%	30%	99%	7%	11%	43%

Source: FAOStat Database

Rather than seeing increased price levels as purely a disadvantage, ASEAN policymakers can support their farmers and traders in ramping up regional production levels, to allow them to benefit from higher prices and incomes. Such increased production can serve as localised “stockpiles” in preparation for future “times of abrupt supply disruptions.”¹⁷

¹⁶ ASEAN, “ASEAN Leaders’ Declaration on Strengthening Food Security and Nutrition in Response to Crises,” 2023, <https://asean.org/wp-content/uploads/2023/09/ASEAN-Declaration-on-Strengthening-Food-Security.pdf>.

¹⁷ Agri-Food and Veterinary Authority of Singapore, “Always Dependable,” *Annual Report 2009/2010*. p.4.

About the Authors



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