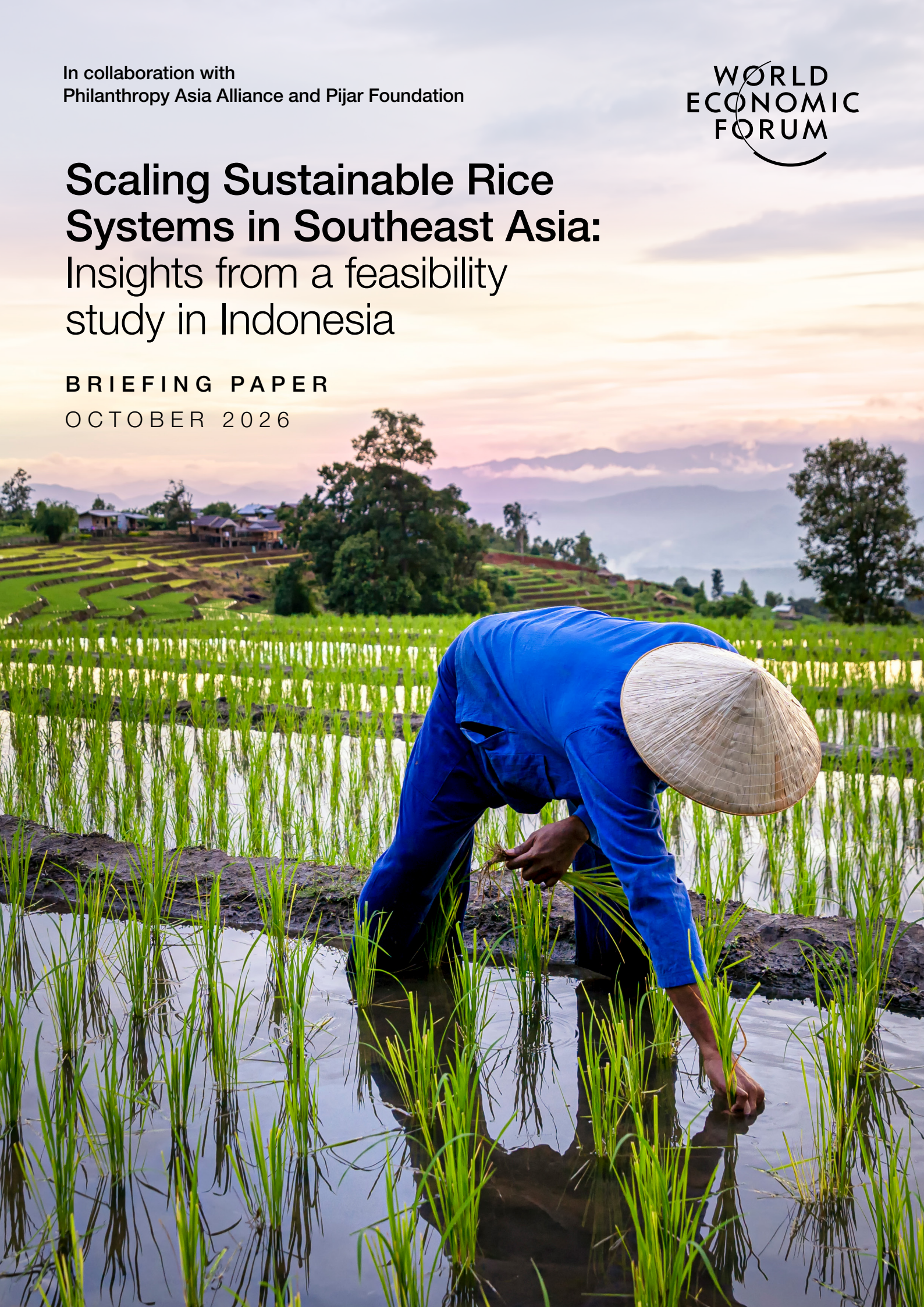
In collaboration with
Philanthropy Asia Alliance and Pijar Foundation

WORLD ECONOMIC FORUM

Scaling Sustainable Rice Systems in Southeast Asia: Insights from a feasibility study in Indonesia

BRIEFING PAPER

OCTOBER 2026



Images: Getty Images

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1 Why rice matters

Rice is the foundation of global food security. As the primary staple for more than half of the world's population, it sustains billions of people and provides a livelihood for hundreds of millions of smallholder households. Yet unlike many other globally traded commodities, only about 10% of global rice production is traded internationally, with the majority produced and consumed within domestic markets. This makes domestic production and policy central to food security and sector transformation.

Pressures such as climate change, supply chain uncertainty, water scarcity and rising demand are placing rice production under growing strain. Recurring El Niño events, including the latest forecast, have made this impossible to ignore. During periods of reduced rainfall, using less water becomes a necessity rather than a preference, and sustaining yields with fewer resources becomes a direct determinant of food security. At the same time, conventional rice cultivation remains highly resource- and emissions-intensive, consuming approximately 40% of global irrigation water use and ranking among the largest sources of agricultural methane emissions. The transition to more sustainable rice systems is increasingly important for both food and climate security.

Southeast Asia is emerging as an important region in this transition. It is one of the world's most strategically important rice ecosystems, accounting for a substantial share of global production, consumption and exports, with more than 90% of the population eating rice daily. As governments pursue ambitious food-security, economic growth and climate objectives, Southeast Asia offers a unique opportunity to develop, demonstrate and replicate scalable models for sustainable rice systems.

This report is the first in a series focused on rice systems in Southeast Asia. Its insights are informed by a feasibility study conducted in Indonesia.



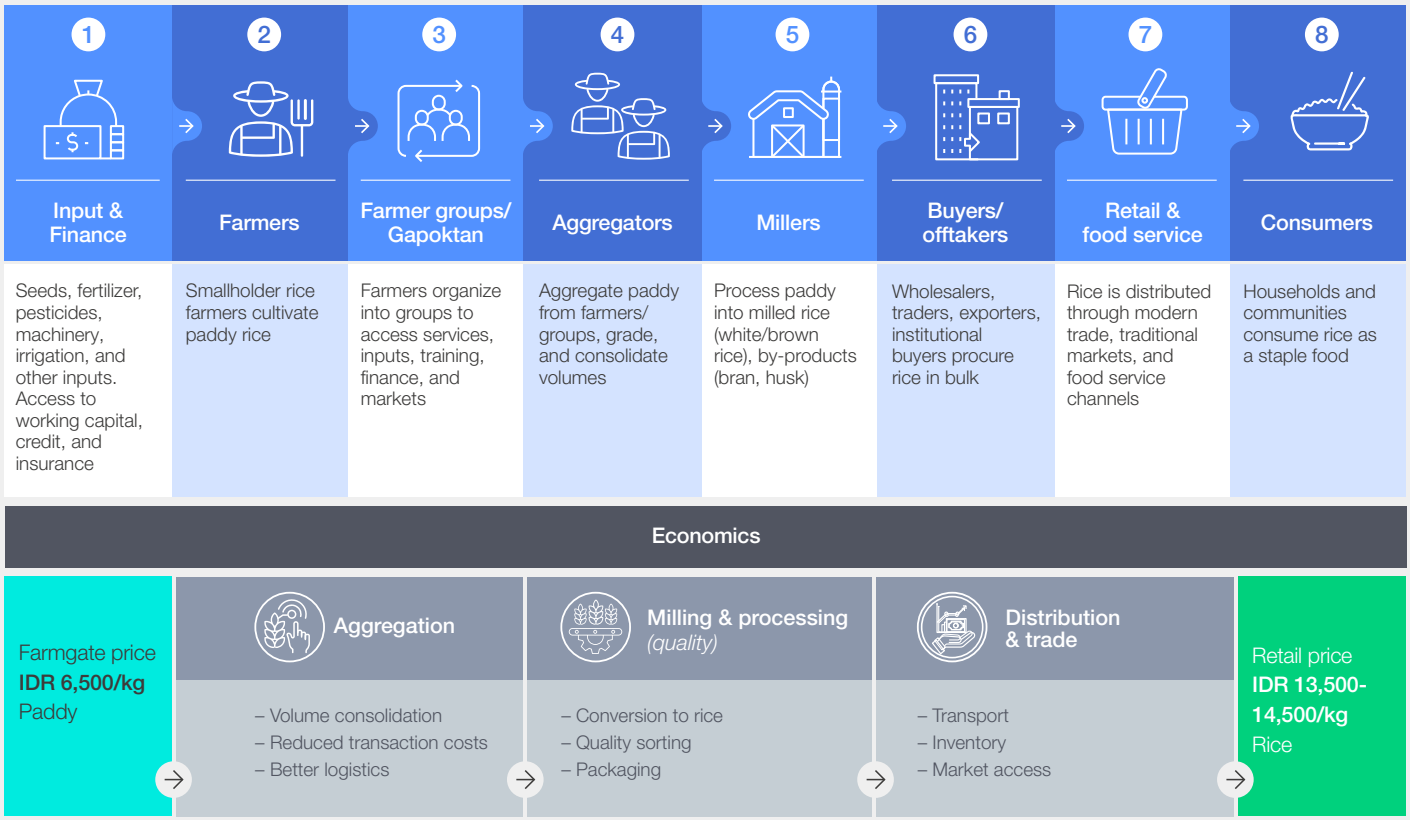
Indonesia's rice system: Opportunities and constraints

Indonesia presents a significant opportunity for this transformation. Rice is the country's most important staple, feeding more than 250 million people and underpinning national food security. Food self-sufficiency (*swasembada pangan*) is a flagship government priority, which makes rice productivity, value chain resilience, and self-reliance a matter of strategic interest. At the same time, rice cultivation accounts for approximately 34% of Indonesia's agricultural greenhouse gas emissions.

Achieving sustainable rice production requires coordination across the entire value chain. From financing and inputs to aggregation, milling and distribution, each participant influences the incentives that determine whether climate-resilient production can scale.

> **Recognizing that climate change has impacted the food security agenda, Indonesia has prioritized climate-resilient and sustainable agriculture. In this context, Indonesia identifies sustainable rice production as a strategic pathway to strengthen the resilience of Indonesia's rice system. These efforts are designed to strengthen and complement the national food self-sufficiency programme, ensuring that the transition to sustainable rice systems enhances food production, productivity, prosperity of farmers and long-term sustainability.**
>
> Leonardo A. A. Teguh Sambodo, Deputy for Food Affairs, Natural Resources and Environment, Ministry of National Development Planning/National Development Planning Agency (Bappenas), Indonesia

FIGURE 1 **Key actors and processes in the rice value chain**



Source: PAA, Bain, World Economic Forum.

BOX 1

Alternate wetting and drying (AWD) practices can advance Indonesia's rice systems

Under AWD, fields are allowed to dry to a safe threshold before re-flooding, rather than being kept continuously flooded, reducing methane emissions and irrigation water usage, while maintaining yields. AWD is the primary practice in this investment case.

AWD is typically most effective when complemented by broader improvements in crop management, including the use of certified seed, nutrient management, more efficient fertilizer application, improved pest management and measures to reduce post-harvest losses. Together, these complementary measures can strengthen farmer livelihoods and support the sustained adoption of more climate-resilient production practices over the long term.

While sustainable rice requires coordination across the value chain, improvements begin at the farm level, where production practices can increase productivity while reducing water use and emissions.

Transitioning to rice production systems aligns with Indonesia's food-resilience and low-carbon development priorities, including the Low Carbon Development Initiative (LCDI) target of bringing approximately 1 million hectares under low-carbon practices by 2030. The technical feasibility of key practices such as AWD has already been demonstrated. Under Indonesian conditions, AWD has maintained rice yields while reducing irrigation water use and methane emissions by up to 30% and 35%, respectively. These results reinforce a growing body of international evidence that these production practices can deliver significant environmental benefits without compromising productivity.

Existing initiatives and remaining gaps

Indonesia's sustainable rice ecosystem has matured considerably, with multiple initiatives addressing important parts of the rice system. While these efforts have demonstrated the technical viability of climate-resilient rice production, several critical gaps remain before sustainable rice can operate at commercial scale.

FIGURE 2

Lessons from existing initiatives

Initiative type	What has been proven	What is still needed for scale
Research and field trials	Climate-resilient practices such as AWD can reduce emissions and water use while maintaining yields under Indonesian conditions.	Moving from technical validation to sustained commercial adoption.
Farmer training programmes	Smallholder farmers can adopt improved production practices when supported by extension and training.	Creating durable economic incentives and market demand for continued adoption.
Monitoring and traceability initiatives	Farm-level data, verification and traceability systems can support sustainability reporting and performance tracking.	Embedding traceability into mainstream procurement and commercial transactions.
Government low-carbon agriculture initiatives	Policy support and institutional commitment to climate-resilient rice production exist.	Coordinating demand, finance, aggregation and processing to enable scale.

Source: PAA, Bain, World Economic Forum.

Recognizing these gaps, Philanthropy Asia Alliance and the Pijar Foundation undertook a 2026 feasibility study to assess not only farm-level economics, but also the market, institutional and financing conditions required for sustainable rice to scale in Indonesia. Examining both the farmer-level economics and the wider market system, the study highlights the potential to increase farmer net surplus by approximately 31% relative to conventional rice under a modelled scenario. Realizing this potential at scale will require a supportive ecosystem that brings together the institutional arrangements, commercial partnerships, financing mechanisms and enabling policies needed to translate successful early cohorts into a durable market system.

2 Learnings from the feasibility study



Drawing on the feasibility study, transition to climate-resilient practices presents a potential economic and emission-reduction opportunity, supported by a phased pathway to test and scale the model from 100 hectares to 10,000 hectares and beyond.

BOX 2

The Commercial Integration Trial (the "Entry Cohort")

What is it? A proposed 100-hectare commercial integration cohort designed to test whether climate-resilient rice production systems can work as a viable commercial model. Unlike a conventional agronomic pilot, it tests the full model under real operating conditions. The Entry Cohort builds on the completed Grobogan agronomic trial, led by Temasek Life Sciences Laboratory with support from the Philanthropy Asia Alliance, which provided evidence supporting the applicability of AWD under Indonesian conditions.

What does it test? The trial tests the core elements needed for commercial scale: demand aggregation, off-take arrangements, traceability, monitoring, reporting, and verification (MRV), financing and delivery coordination. It uses the same high-quality, sustainable white rice intended for scale, avoiding a product transition or reliance on specialty-market pricing.

How does it work? The trial runs for four consecutive cultivation seasons, or approximately two years. After two seasons, progress is reviewed against defined criteria, including changes in farmer income, offtaker willingness to procure at commercially viable prices, quality and delivered cost, functioning MRV and coordination systems, and evidence of demand, adoption and delivery. Two further seasons then test whether results can be delivered consistently and repeatedly.

What happens next? Evidence from all four seasons informs the decision to progress toward the modelled 10,000-hectare commercial portfolio and beyond. Financing covers the full four-season trial, while the financial model is presented annually, based on two cultivation seasons per year.

Key considerations

Rice is a fundamental food-security staple operating within a regulated pricing environment. Therefore, the economics of the transition need to be grounded in production fundamentals, particularly improved grain quality and milling recovery, rather than consumers paying more for positive climate and water outcomes. This constraint will also make the model a useful reference for other countries facing the same market reality: consumer willingness to pay a meaningful premium for sustainable rice remains limited in most mainstream rice markets.

BOX 3

How Indonesia's rice pricing works

As a food security staple, the retail price of rice is regulated through the Harga Eceran Tertinggi (HET) system, which sets maximum retail prices and differentiates rice by quality, including regular and premium categories. "Premium" denotes an existing premium-quality price tier within the regulated market, not a sustainability premium.

Sustainable rice earns more not because buyers pay extra for a sustainability attribute, but because improved grain quality and milling recovery could enable it to qualify for this existing higher-quality HET class and its higher regulated price, subject to validation during the Entry Cohort.

Scaling sustainable rice production practices such as AWD also requires addressing several enabling conditions: upfront farmer training, and monitoring, reporting and verification (MRV) costs, coordination across cooperatives, offtakers, financial institutions and government agencies, and access to affordable finance at the farm level. Many Indonesian rice farmers face liquidity constraints and rely on informal credit from middlemen, where crops are sold in advance at a discount for upfront cash. Expanding access to affordable working capital could therefore play an important role in supporting adoption at scale.

Transition economics at 100 hectares

For the farmer, the model projects an approximate 31% increase in net surplus, driven by a higher farmgate price, an approximate 6% yield uplift and lower total production costs. Within production costs, operating costs rise modestly, as additional labour and monitoring for AWD outweigh expected savings on fertilizer, pesticides and water. However, the modelled 3% financing rate assumed in the scenario more than offsets this increase, leaving total production costs slightly below the conventional baseline.

For the offtaker, the case rests on a simple dynamic: the additional price it can command within the existing premium-quality segment exceeds the additional price paid to the farmer. Better milling recovery widens the gap, projecting a modelled increase in gross processing margin of approximately 45%, assuming the projected quality and milling recovery outcomes. The additional price sits within Indonesia's existing premium quality tier, so it reaches the consumer at no sustainability surcharge. This margin is stated gross of milling, packaging and logistics. Any future carbon revenue, if generated and successfully issued, could provide additional upside depending on ownership, benefit-sharing and programme design. Both the farmer surplus uplift and the offtaker margin gain rest on assumptions – premium-category qualification, milling recovery and the assumed financing rate – that remain to be validated through the Entry Cohort.

A phased scalable pathway

If the Entry Cohort demonstrates viability against predefined commercial and operational criteria, the programme would expand into a modelled 10,000-hectare commercial portfolio across priority clusters. This portfolio is built on high-quality white rice as the scale engine, with any future carbon revenue acting as a secondary de-risking mechanism. The financing architecture aims to evolve with programme maturity.

TABLE 1 | **Projected financing evolution across phases***

Capital component	**Entry cohort** (100 ha)	**Commercially scalable portfolio** (10k ha)	**Pathway to mainstream adoption** (beyond 10k ha)
Working capital	Corporate/offtaker	DFI/ MDB concessional** (~3%)	Commercial/offtaker
Credit enhancement (first-loss)***	Philanthropy-first (~2× seasonal loss)	DFI-first (~5–8% of the concessional loan pool)	Beyond 10,000 hectares, commercial finance becomes the dominant source of investment, with government providing enabling policies and fiscal support while philanthropic capital shifts to catalysing future innovation
Farmer capability and AWD transition	Philanthropic	Corporate/catalytic	
MRV	Corporate/offtaker (at cost)	Carbon-project developer	
Dominant capital source	Catalytic/corporate	Concessional, crowding in commercial	

Note: *Indicative structure. **Development Finance Institution/ Multilateral Development Bank. ***The first-loss reserve is sized to cover roughly one severe harvest season without depletion and is replenished by farmer repayments between cycles. The structure is intended to reduce farmers' exposure to transition-related harvest risk, subject to the agreed repayment and loss-sharing terms; commercial lenders sit protected above the reserve.

The staged design reflects the model's economies of scale: each stage progressively proves and de-risks the next, spreading coordination costs and building the conditions for long-term commercial viability and replication. The proposed scale-up architecture channels concessional finance through regulated financial intermediaries, with first-loss support reducing early-stage risk and progressively crowding in commercial banks as the model is validated.

Beyond 10,000 hectares, the model is designed to replicate across additional rice-producing regions and evolve into permanent market infrastructure. As the portfolio becomes increasingly de-risked, commercial lending and offtaker balance sheets are intended to become the dominant sources of working capital, allowing concessional and catalytic capital to step back. Delivering this pathway remains fundamentally a coordination task.

Building the market system

A durable market requires several mutually reinforcing components operating as a single system rather than as separate interventions.

Aggregated, non-premium demand: Rice demand in Indonesia is already substantial and well established. The challenge is whether that demand can be structured to support climate outcomes at commercially viable economics. This demand is for higher-quality rice within the existing HET category, not a sustainability-labelled product. AWD practices support this proposition while reducing water use and improving resource-use efficiency.

BOX 4 | **Two complementary demand structures emerge**

1. A single champion offtaker that anchors the initial cohort, providing anchor demand and helping de-risk the farmer transition
2. A pooled multi-buyer structure in which multiple offtakers share demand and transition risk, adding diversification as the programme scales

The 100-hectare cohort would require a champion offtaker to anchor demand, with a pooled multi-buyer structure retained as an option for scale. In both cases, securing demand before farmers transition provides the certainty needed to support adoption.

Farmer services and incentives: Technical assistance, working capital and transition support are delivered through Indonesia's existing Gapoktan farmer-group system and a training-of-trainers model, reaching thousands of farmer groups across the priority zones. The programme directs an existing, high-reach network towards a coordinated commercial objective rather than building farmer-engagement infrastructure from scratch. There is a natural opportunity to potentially align this delivery channel with the Ministry of Agriculture's public extension system (*penyuluh pertanian*). Subject to stakeholder confirmation, this could multiply reach, help embed the practice within an institutional channel over time and provide a pathway towards integration into national agricultural programming. As cash-constrained smallholders have limited capacity

to absorb a poor harvest, farmer services also include a first-loss or insurance buffer to reduce their risk during the transition to new practices.

MRV and traceability: MRV systems provide the basis for trusted traceability. They meet value-chain requirements for product provenance, quality, certification and Scope 3 reporting, with additional carbon-market requirements where relevant. For the purposes of this model, MRV is treated primarily as a cost of building trust and traceability, rather than as a near-term revenue generator.

A scalable financing platform: Scale requires a replicable financing platform, not a one-off intervention. The Entry Cohort validates the commercial ecosystem needed to attract this financing evolution (see Table 1).

Orchestration through the multistakeholder platform: A multistakeholder platform coordinates farmer groups, millers, offtakers, financiers and government, reducing the coordination failures that have limited previous pilots. Its mandate includes securing anchor demand and off-take arrangements; confirming that sustainable white rice meets the existing HET quality criteria and qualifies for the regulated premium tier and its higher price; onboarding and aggregating farmers; coordinating MRV and certification; and maintaining the relationships with public institutions, including the National Development Planning Agency (Bappenas) and the Ministry of Agriculture, needed to advance enabling policy.

BOX 5

Why carbon revenue is not the foundation

Carbon revenue is a genuine long-term opportunity, but it cannot underpin the market system. Indonesia's agricultural carbon market is still developing, with methodologies, registries and pricing that continue to evolve. Furthermore, the three-to-four-year payback period after registration is generally too long for smallholders to rely on. Carbon should therefore be treated as upside only.

Superior farmer economics, driven by yield gains and access to premium-priced markets for higher-quality rice, must instead drive adoption. This, in turn, requires financing structured around tangible, near-term farmer returns rather than a future carbon stream that has yet to materialise.

Overall programme impact

At 10,000 hectares, the programme could reach approximately 40,000 smallholder farmers and generate value beyond the direct benefits to farmers and offtakers. Based on indicative modelled assumptions, the portfolio could generate approximately $40.5 million in aggregate farmer net surplus and $15.0 million in gross processing margin annually, while avoiding an estimated 40,000–60,000 tCO_2e of emissions and saving 50–90 million m^3 of irrigation water under the modelled scenario.

These outcomes support a broader case for scale. Improved farmer economics, production quality and offtaker margins underpin the commercial case, while water conservation and emissions reductions create wider system-level benefits.



3 Scale pathways: A shared agenda

For enabling longer-term transition of rice systems, a key challenge is coordinated action and committed, reliable demand: a credible signal from buyers that gives farmers the confidence to transition, mobilizes financing and gives the rest of the value chain an anchor to build around. Against this backdrop, the First Movers Coalition for Food (FMC for Food) serves as a leadership platform to help address the demand aggregation challenge. Bringing together more than 60 partners, it helps to unlock demand signals and build market confidence for regenerative, sustainable and resilient agri-commodities at scale. The coalition convenes leading value chain actors, especially demand players, with governments, experts, farmers and others to develop practical approaches and build their own playbooks for real-world impact, helping translate individual commitments into stronger and more credible demand signals.

FMC for Food's CEO guide, *CEO Lessons for the Future of Food Procurement*, sets out two complementary approaches through which buyers can translate demand commitments into action without relying on a "green premium": spec-anchored sourcing and decoupled sourcing. Both approaches can support the transition of rice systems.



Spec-anchored sourcing

Sustainable rice requirements are incorporated directly into a buyer's procurement specifications and supplier arrangements, including relevant production practices, quality and MRV requirements. This can support closer supplier collaboration through off-take arrangements, technical assistance and co-investment.

Application in this programme

A champion offtaker could test this approach through the 100-hectare Entry Cohort. It can also remain viable at larger scale where buyers can incorporate climate- and water-related requirements into supplier contracts and use an appropriate traceability or mass-balance accounting system.



Decoupled sourcing

Sustainability investment is separated from the physical procurement of rice. Buyers can fund programmes within relevant supply-sheds and account for the resulting outcomes on a mass-balance basis, while farmers retain flexibility to sell on the open market.

Application in this programme

This approach could be used at either the Entry Cohort or larger scale, particularly where procurement specifications are impractical, or buyers prefer a landscape-based model. A single buyer can finance the programme, or multiple buyers can pool resources within the same supply-shed.

Across both stages, credible demand provides the foundation for implementation. This may take the form of procurement commitments, offtake guarantees or co-investment from individual buyers, as well as pooled commitments from multiple buyers operating within the same supply shed. The appropriate sourcing strategy can vary by buyer and evolve as evidence, supplier relationships and traceability develop.

However, establishing credible demand is only one part of the pathway to scale. Coordinated implementation is required across policy, market incentives, philanthropy, financiers, farmers and the private sector to move beyond demonstration projects. Achieving this transition will require complementary public and private sector contributions, with different stakeholders having distinct roles across the system, while philanthropy plays a critical catalytic role. Finally, the diversity and fragmentation of rice value chains across geographies require implementation approaches to be adapted to local market conditions.

The central conclusion is that no single intervention will be sufficient to achieve lasting scale. For companies sourcing rice in Indonesia and Southeast Asia, this provides a commercially grounded pathway to sustainable rice within the existing quality-based pricing framework, without reliance on a sustainability surcharge.

The agronomic case is established, while the commercial pathway and financing architecture are defined for validation through the Entry Cohort. Progress will require coordinated action across value-chain participants, financial institutions and government.

TABLE 2 **Coordinated actions for scaling climate-resilient rice production systems**

Implementation components	Key stakeholders	Priority contributions	Intended outcome
Aggregated demand signals*	Corporate and public offtakers, agribusinesses, farmer organizations	Create long-term procurement commitments, provide credible demand signals, align procurement with sustainability requirements.	Committed offtake and credible demand that gives farmers and financiers confidence to invest ahead of the transition.
Technical assistance and farmer adoption	Government, farmer organizations and cooperatives, agribusinesses, research and implementation partners	Support an enabling environment through extension services, standards, implementation support and complementary measures that facilitate farmer adoption.	Farmers have the knowledge, capabilities and technical support required to adopt sustainable production practices.
Coordinated blended financing	Financial institutions, philanthropy	Mobilize concessional capital and blended-finance instruments that reduce transition risk and crowd in commercial investment during scale-up.	Farmers can access affordable working capital and de-risking mechanisms that lower the real and perceived cost of adoption.
Mechanisms to measure and verify outcomes	Implementation partners, corporates, MRV providers, research institutions	Establish and strengthen MRV and traceability capabilities.	Demonstrated sustainability performance and traceability strengthen market integrity. Robust emissions baselines enable Scope 3 reporting and can facilitate access to carbon finance over time.
Multistakeholder coordination	Public and private actors, farmer organizations, financiers, research and implementation partners	Providing a platform to coordinate implementation regularly, address policy and market barriers, strengthen linkages and support learning and adaptation.	The implementation components function as one integrated system rather than as parallel efforts, aligning incentives and strengthening accountability.

*In full respect of all competition and antitrust laws and regulations.

BOX 6 **Invitation to collaborate**

The First Movers Coalition for Food welcomes continued collaboration to further refine and validate the models outlined in this briefing paper. Partners interested in piloting elements of the model, sharing lessons learned, or exploring opportunities for collaboration are invited to contact the First Movers Coalition for Food at FMCFood@weforum.org.

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