United States Department of Agriculture

Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

September 2, 2025

Commodity Intelligence Report

NORTH KOREA MY 2025/26 SEASONAL CROP CONDITIONS AND FOOD SECURITY OUTLOOK

USDA forecasts North Korea corn production at 2.3 million metric tons (mmt), unchanged from last year, but approximately 1 percent above the 5-year average (Figure 1). Corn harvested area is forecast at 585,000 hectares (Ha), unchanged from last year, but approximately 1 percent higher than the 5-year average. The yield is forecast at 3.93 metric tons per hectare (mt/ha), also unchanged from last year and approximately 1 percent above the 5-year average. Rough rice production is forecast at 2.27 million metric tons (1.47 mmt milled), unchanged from 2024/25, and 5 percent above the 5-year average (Figure 2). Harvested rice area is forecast at 544,000 hectares (Ha), unchanged from last year, but approximately 1 percent higher than the 5-year average. Rice rough yield is forecast at 4.18 mt/ha, also unchanged from last year, but up 4.7 percent from the 5-year average.

The 2025/26 agricultural cropping season is well underway and into the mid-season. The main season crops are rice and corn, accounting for almost 90 percent of the total crop output. Rice and corn are the major staple foods in North Korea (Figure 3). Other important crops also contribute to North Korea's agriculture albeit in relatively smaller quanties including soybeans, potatoes, millet, and sorghum. Rice is predominantly produced in the western provinces of South Hwanghae (Hwanghae-namdo), 28%, North Pyongan (P'yongan-bukto) 22%, South Pyongan (P'yongan-namdo) 20%, and South Hamgyong (Hamgyong-namdo)11%. The southern, southwestern, and western provinces are considered the "cereal bowl" regions. In recent years, potatoes have emerged as a staple crop in addition to rice and corn, contributing about 8 percent to the annual output of food crops. Wheat and barley contribute approximately 2 percent to the total annual food production; these are mainly winter crops with a small amount planted in early spring.

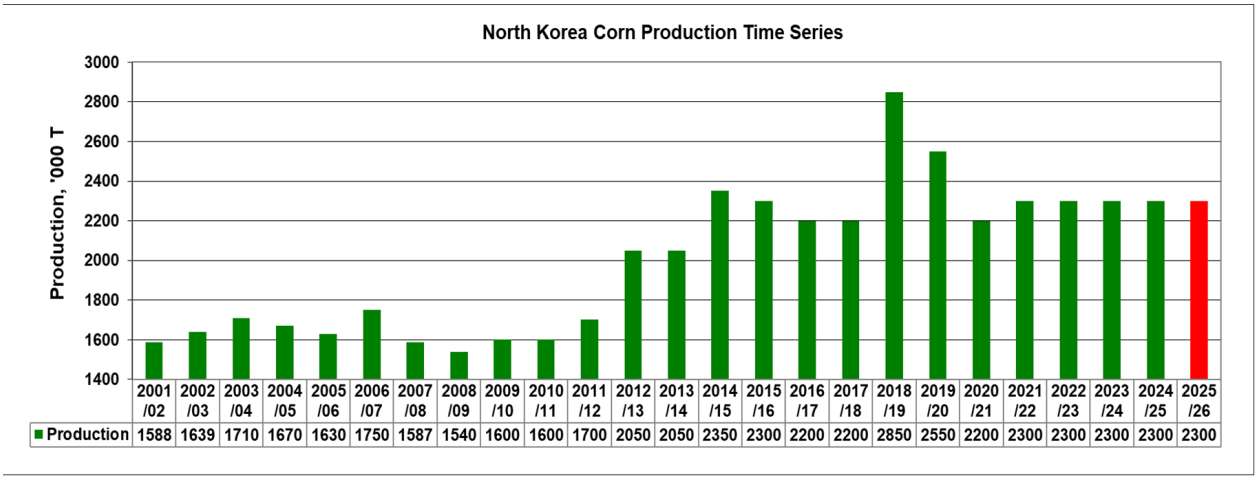
The major staple foods, rice and corn are grown from May to October with the optimum sowing window occuring from May to June. During July to August, rice and corn are at the advanced vegetative-to-reproductive stages. The major rice and corn production regions are in the provinces of North Pyongyang, South Pyongyang, Pyongyang, North Hwanghae and South Hwanghae (Figure 4).

USDA's assessment of North Korea's crop conditions is primarily based on remote obsevations, analysis, and interpretation of satellite-derived indicators (agroclimatic and agronomic indicators). The agroclimatic indicators are used to assess weather factors

and its impacts on crops; the agronomic indicators are used to assess crop conditions, development, and productivity. This year's growing season began with beneficial soil moisture conditions, and the rainfall continued to be above average, providing favorable conditions for planting and crop establishment during May, June, and July. During the June-to-July monitoring period, the indicators reveal that North Korea is experiencing a favorable season compared to the long-term average. That is, both the agroclimatic and agronomic indicators reveal favorable conditions, especially for rice and corn. The rainy season typically starts in April and about 80 percent of the annual precipitation, on average, occurs between July and September. Early-to-mid season precipitation has been normal-to-above normal (Figure 5). Soil moisture conditions during the critical part of the season for corn and rice, June and July, have been adequate to abundant. Recent soil moisture anomaly comparisons indicate normal-to-above-average conditions (Figure 6). The major rice and corn production regions benefitted from the above-average rainfall and soil moisture conditions. For the spring-summer grains, rice, corn, and soybeans are in mid-to-advanced grain-filling stages with harvest typically expected to start in early September.

Direct visualization of satellite images in South Pyongyang and South Hwanghae indicate no significant difference in crop performance for 2025/26 relative to 2024/25, and 2023/24 (Figure 7, 8). Indications of favorable crop conditions based on seasonal MODIS NDVI time series data (Moderate Resolution Imaging Spectroradiometer Normalized Difference Vegetation Index) (Figure 9) has been consitent from early vegetative-stages to mid-season advanced crop develoment stages. The near-real-time (NRT) 8-Day composite MODIS NDVI anomaly image also provided further operational evidence of favorable conditions relative to the long-term average across the major growing regions of North Pyongyang, South Pyongyang, Pyongyang, and North and South Hwanghae (Figure 10). This data confirms and provides a high confidence level that crops are functioning well with no signs of moisture stress due to lack of water.

USDA's current crop predictions incorporate seasonal observations up to the end of July including cumulative rainfall, irrigation water availabilty and soil moisture conditions. As the season progresses, continued favorable rainfall and irrigation supplies will increase the chances of rice and corn achieving higher-than-expected productivity, leading to increased food supply and food security for North Korea.



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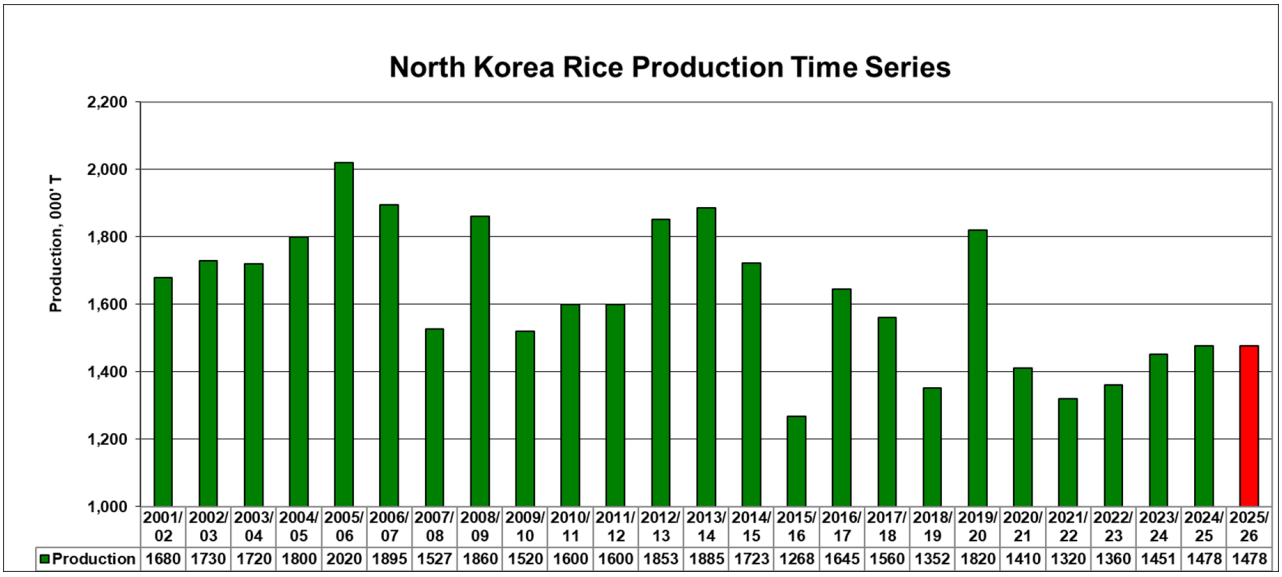
Source: USDA PSD Online

Figure 1. North Korea corn production time series.



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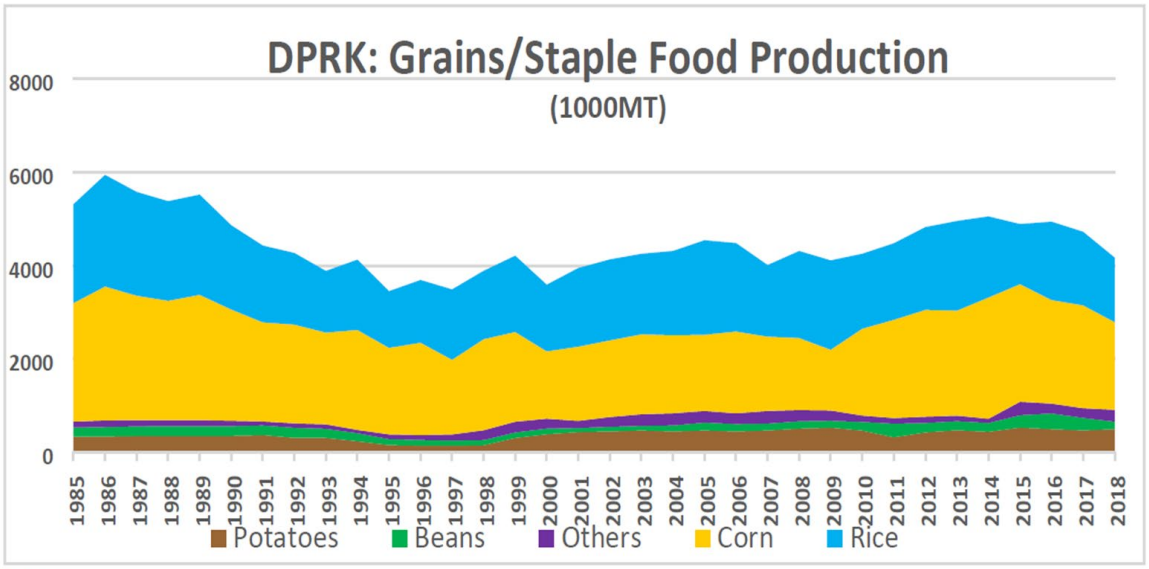
Source: USDA PSD Online

Figure 2. North Korea rice production time series.



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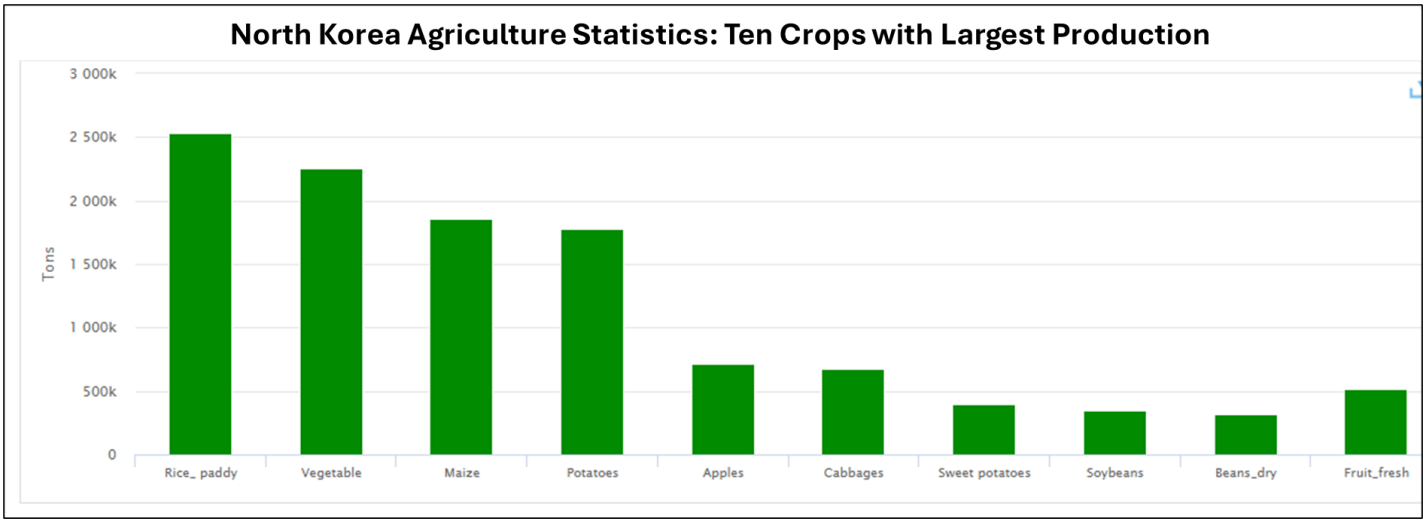
Source: United Nations World Food Programme (WFP)

Figure 3. Rice and corn are the major staple foods in North Korea. Source UN.



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Source: FAOSTAT data for the years 2003-2016

Figure 4. North Korea Top Ten Crops with Largest Produtcion.

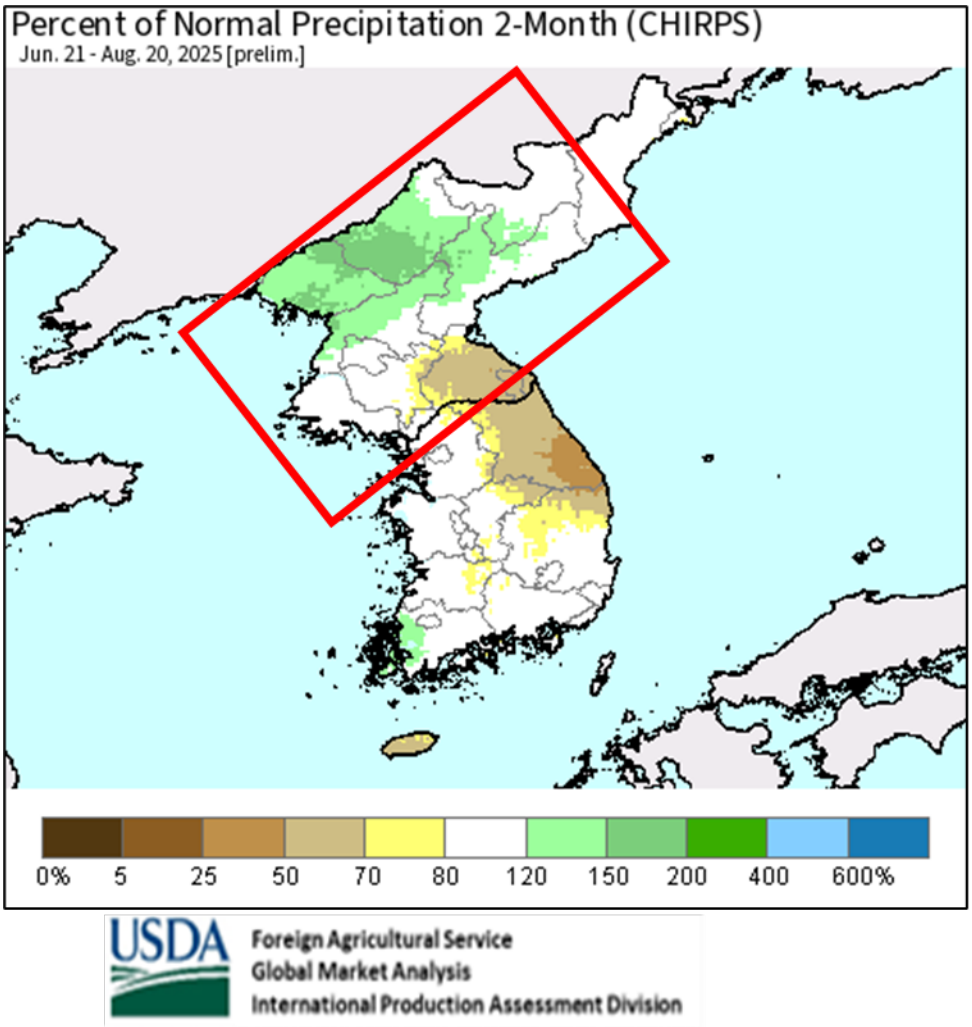


Figure 5: Favorable precipitation across the major agricultural regions

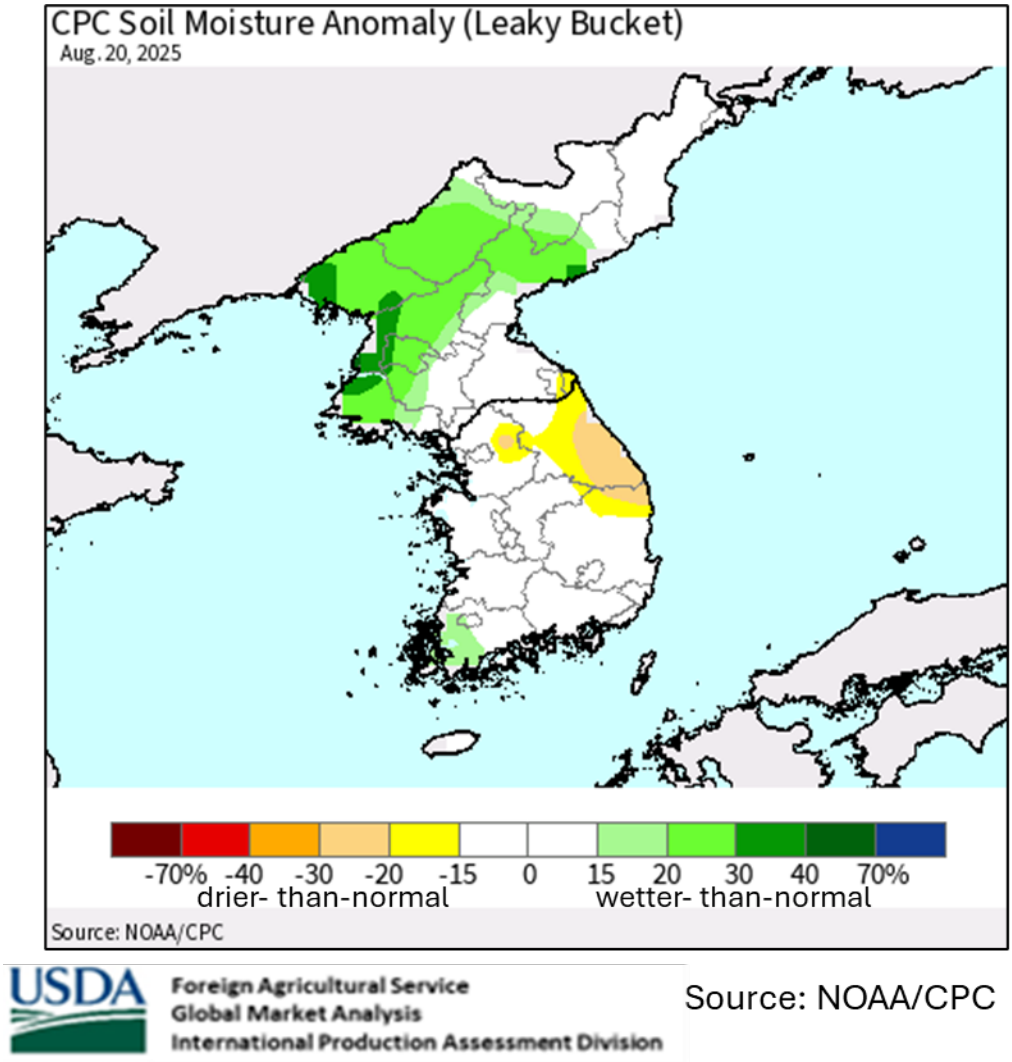


Figure 6. Favorable soil moisture conditions across the major agricultural regions.

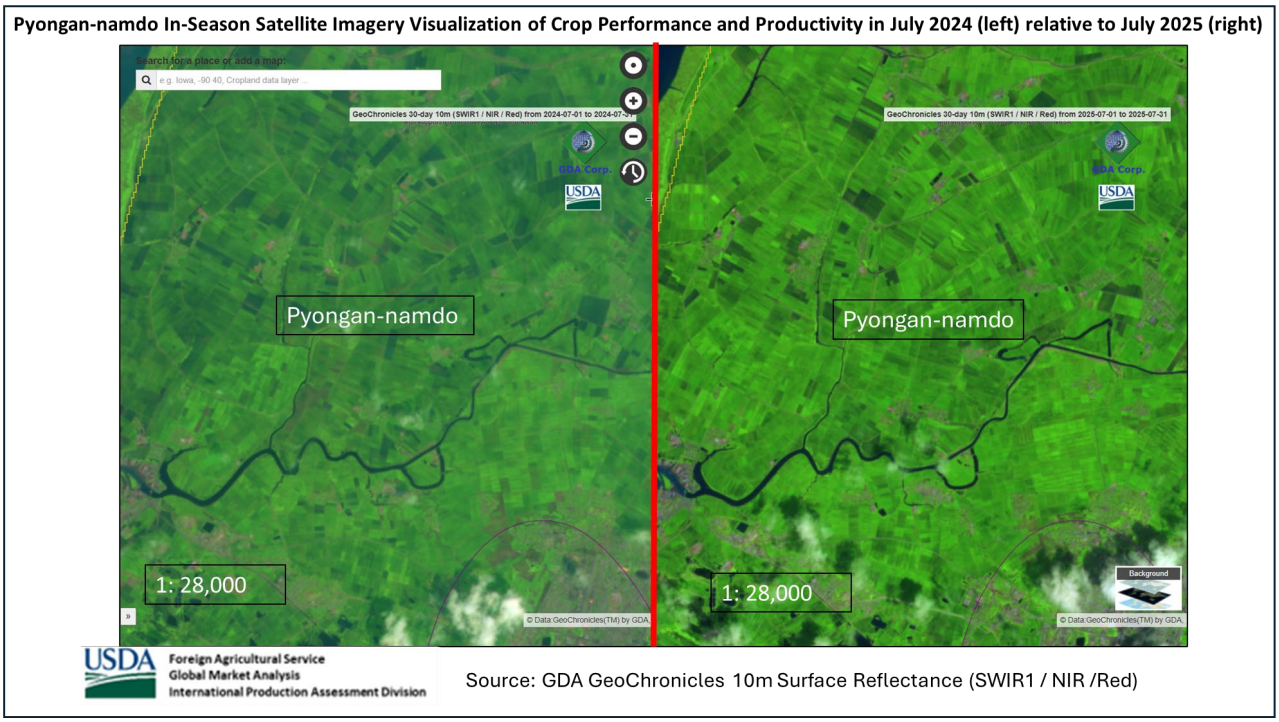


Figure 7. Pyongan-namdo in-season satellite imagery used as a proxy for visualization of crop conditions. At the end of July, the imagery observations indicate no significant difference in cropping areas between 2025/26 (right) relative to 2024/25 season (left).

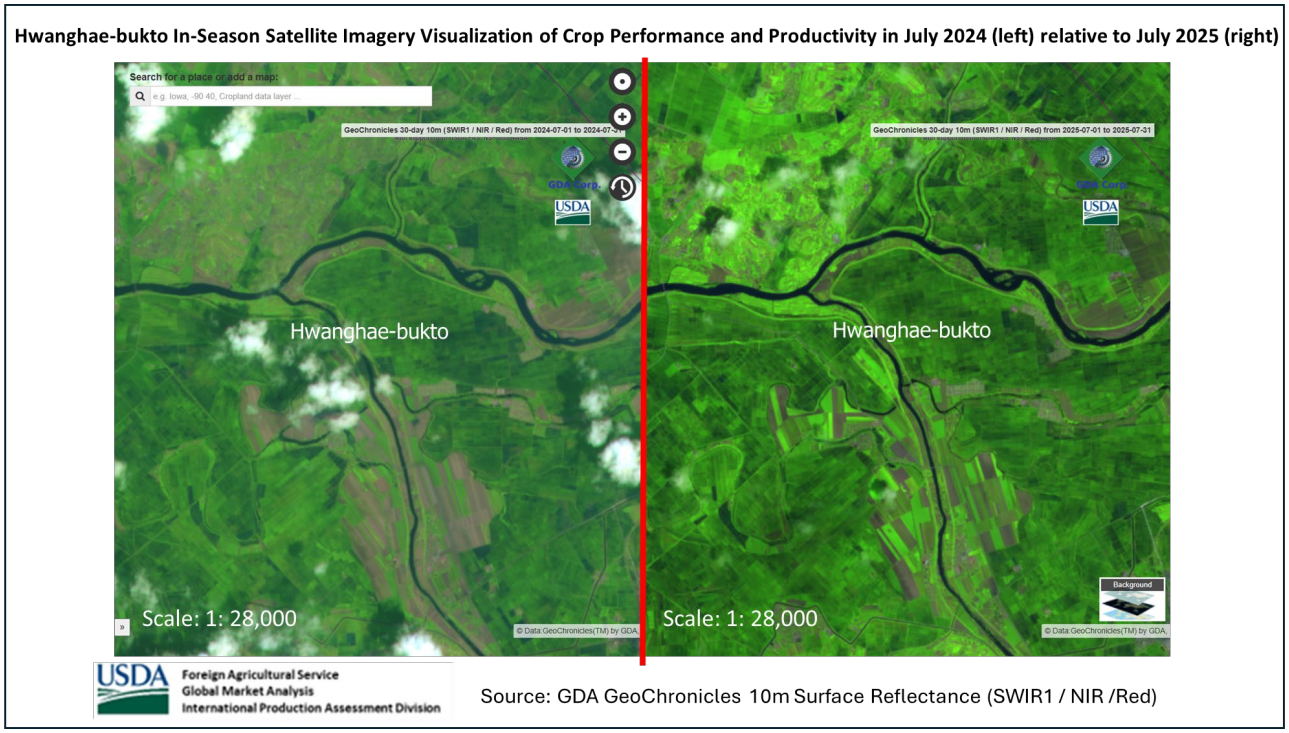
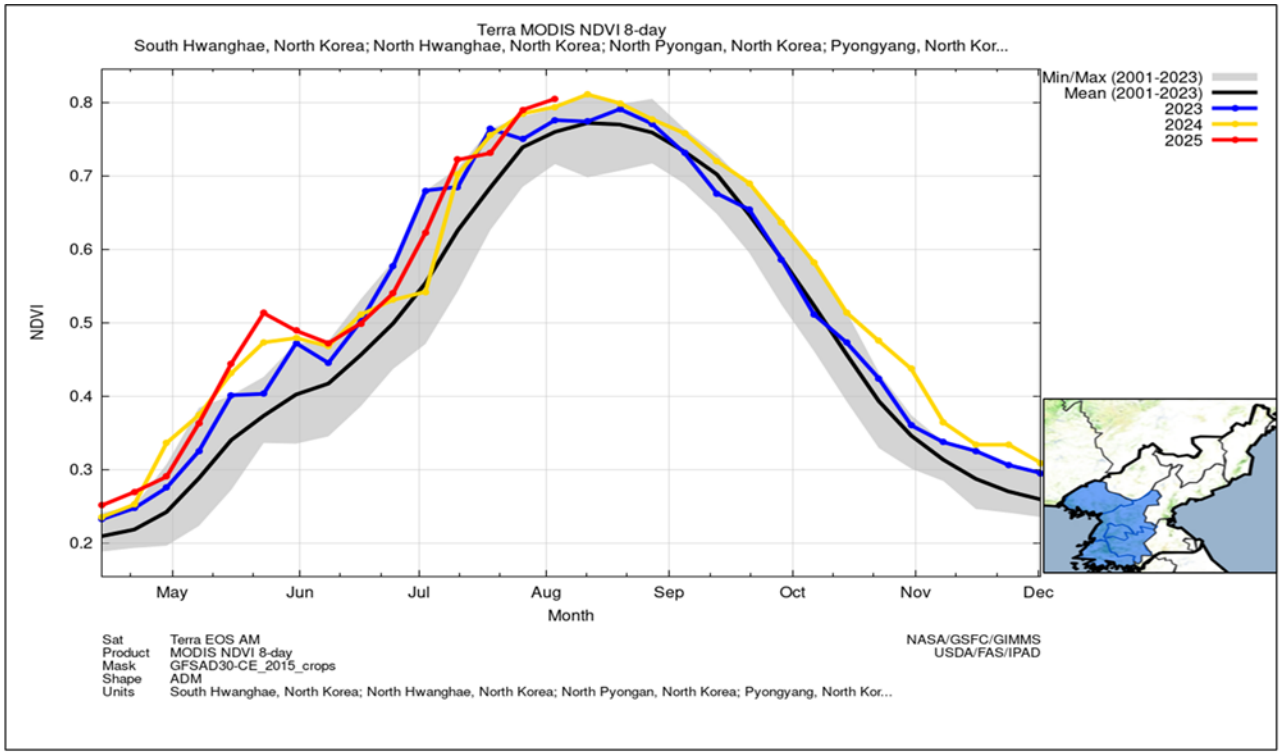


Figure 8. Hwanghae-bukto in-season satellite imagery is used as a proxy for visualization of crop conditions. At the end of July, the imagery observations indicate no significant difference in cropping areas between 2025/26 (right) relative to 2024/25 season (left).



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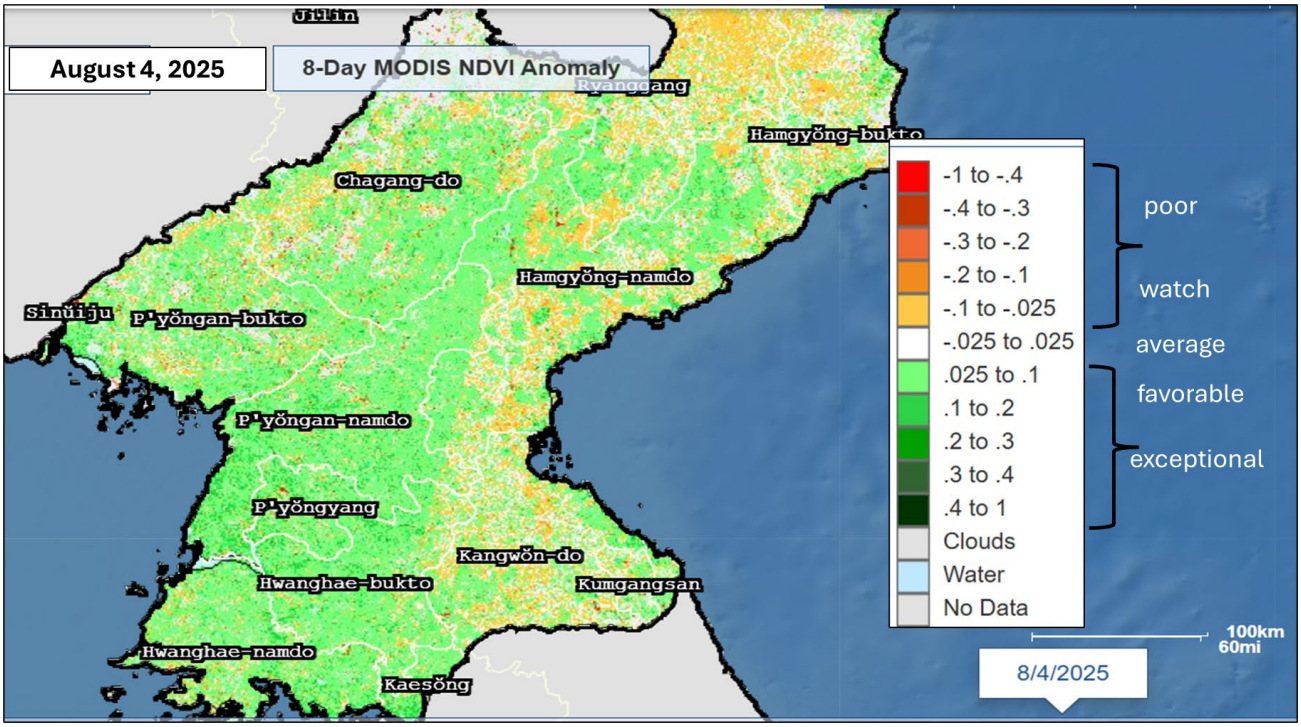
Source: NASA USDA GLAM GIMMS (Global Agricultural Monitoring)

Figure 9. Seasonal NDVI time series (Normalized Difference Vegetation Index) derived from MODIS satellite imagery (Moderate Resolution Imaging Spectroradiometer) indicates no significant difference in the 2025/26 crop conditions relative to 2024/25, and 2023/24 seasons.



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Source: NASA USDA GLAM (Global Agricultural Monitoring)

Figure 10. Near-Real-Time (NRT) 8-Day composite MODIS NDVI Anomaly image indicates favorable agricultural crop production outlook and conditions relative to the long-term average across the major growing regions.

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