

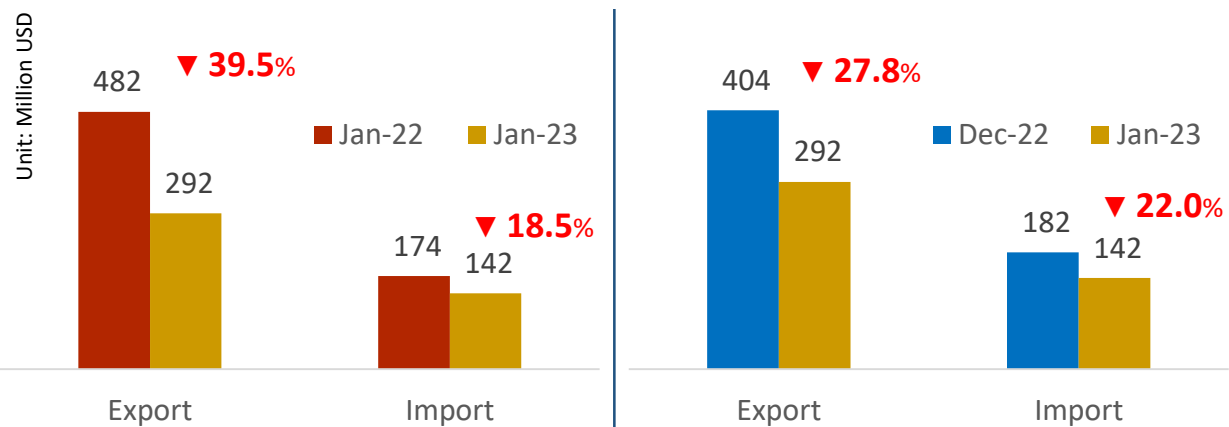
MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **THE EU MARKET**

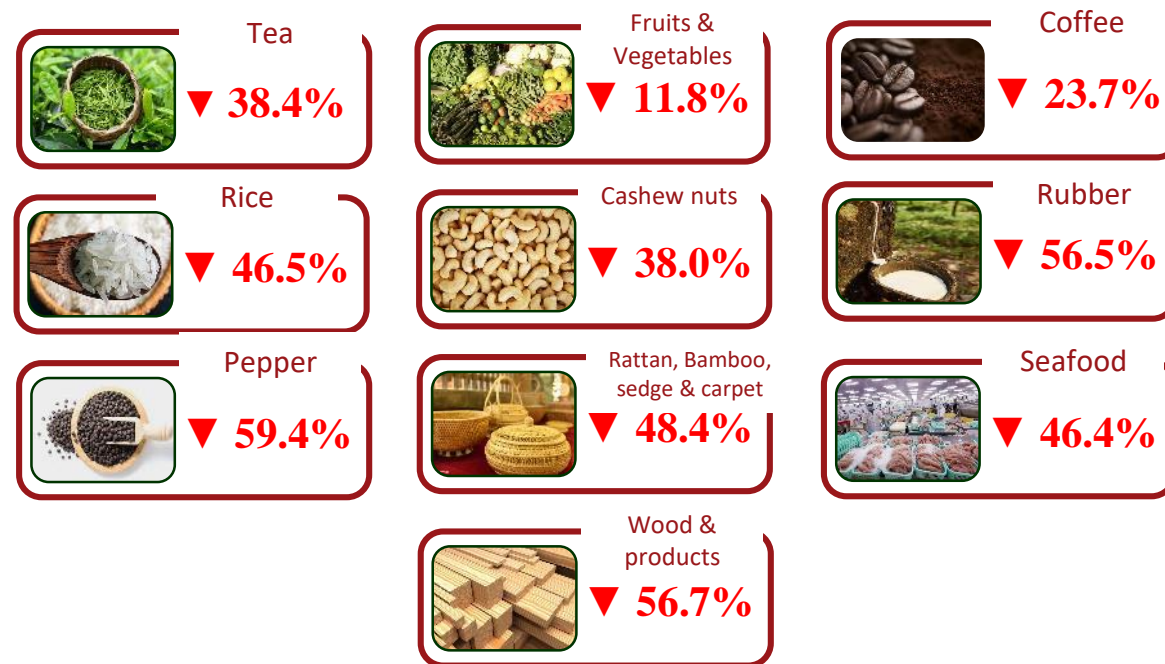


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE EU IN JANUARY 2023

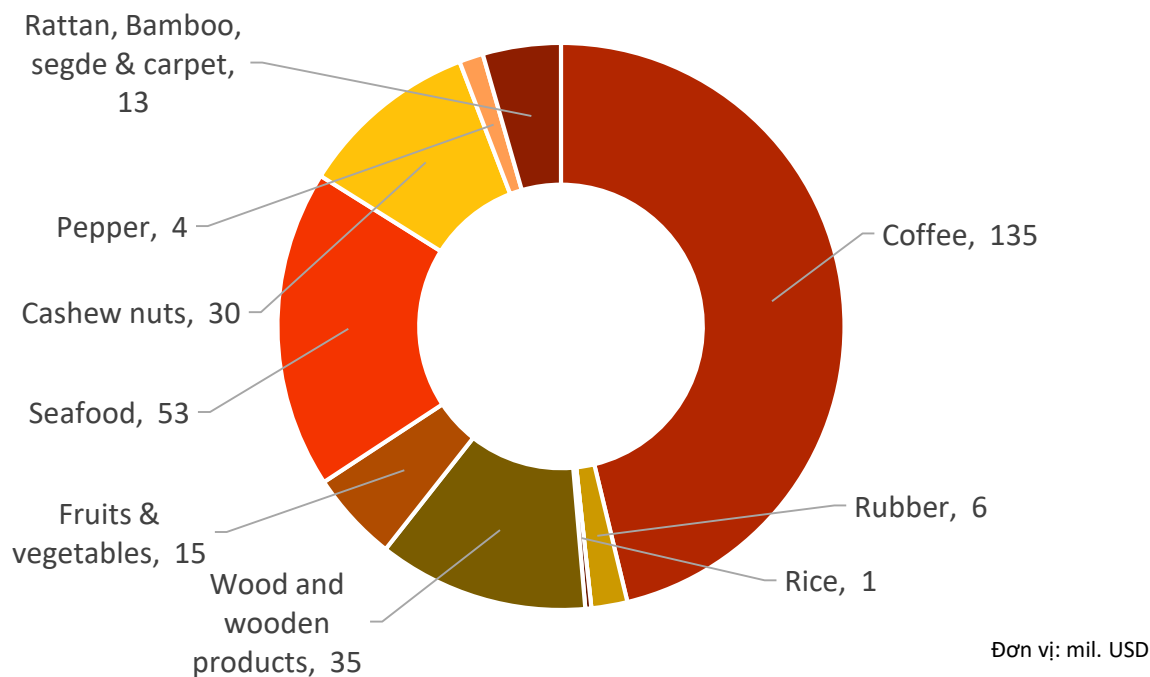
AFF product import-export turnover between Vietnam and the EU, Jan-2023



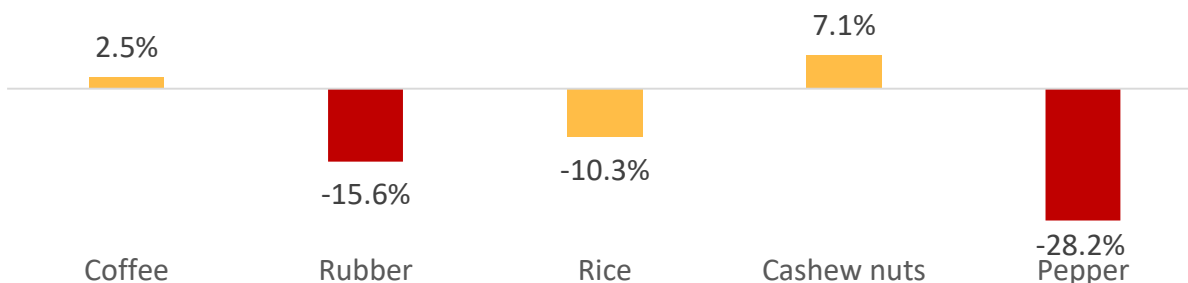
Changes in key AFF product export value to the EU in Jan-2023 compared to Jan-2022



Key AFF product export value to the EU, Jan-2023



Changes in average export value of key AFF products to the EU in Jan-2023 compared to Jan-2022



The EU tightens regulations on imported goods

The EU has just officially issued Regulation 2023/174 amending Regulation

2019/1793 on the temporary application of official and emergency control measures on certain goods imported into the EU. Specifically, the regulations amend some Vietnamese products as follows: instant

noodles containing spices, seasoning powder or sauce, dragon fruit will have a pesticide testing frequency of 20%; Okra and bell peppers of the capsicum variety still maintain an inspection frequency of 50%.



Source: Vneconomy.vn

Eurozone unexpectedly grew beyond forecasts

On January 31, 2023, the European Union Statistical Agency (Eurostat) announced official data showing that the Eurozone economy unexpectedly grew by 0.1% in the fourth quarter of 2022, thereby avoiding a recession scenario this winter.

However, the data still shows a slowdown in growth from 0.3% in the third quarter of 2022, but is more positive than the negative growth forecast that economic experts previously made in the context of the impact. The conflict in Ukraine has caused energy prices to escalate and inflation to continuously record record highs.

Compared to the same period last year, the Eurozone's Gross

Domestic Product (GDP) is expected to increase by 1.9% in the fourth quarter of 2022. Meanwhile, GDP in the European Union (EU) is expected to increase by 1.8%.

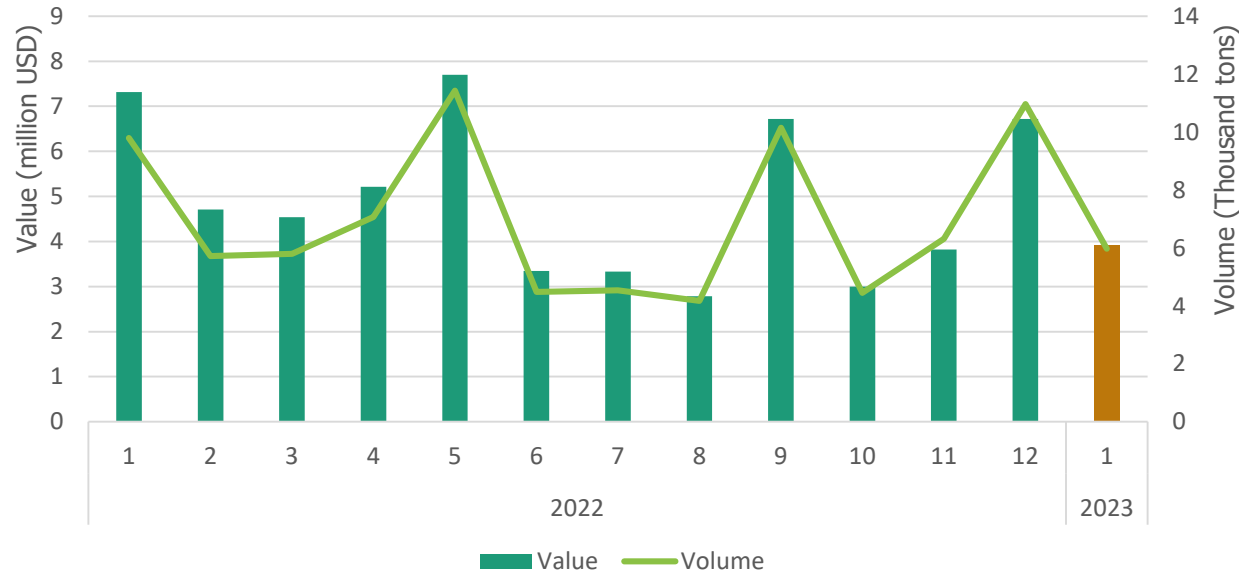
Source: Dangcongsan.vn





RICE

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE
3.92 mil. USD \$

Decrease **41.7%** compared to Dec-2022

Decrease **46.5%** compared to Jan-2022

↓ **1.0 mil. USD** less than the monthly average rate in 2022

❖ **6.6%** of total 2022

VOLUME
5.97 thousand tons

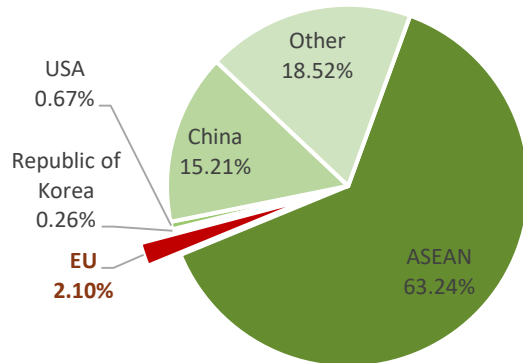
Decrease **45.6%** compared to Dec-2022

Decrease **39.1%** compared to Jan-2022

↓ **1,103 tons** less than the monthly average rate in 2022

❖ **7.0%** of total 2022

Percentage of export value to the EU, Jan-2023



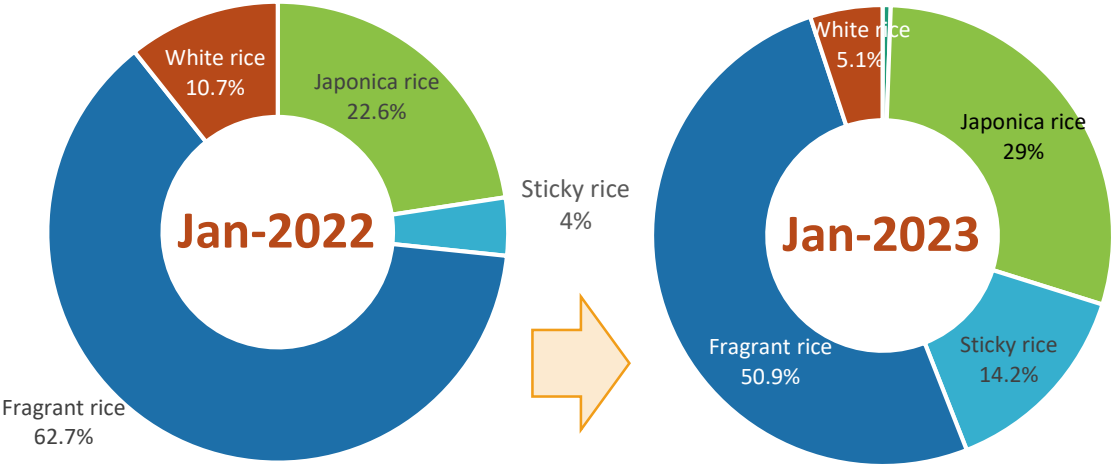
Changes in percentage of export value to the EU, Jan-2023



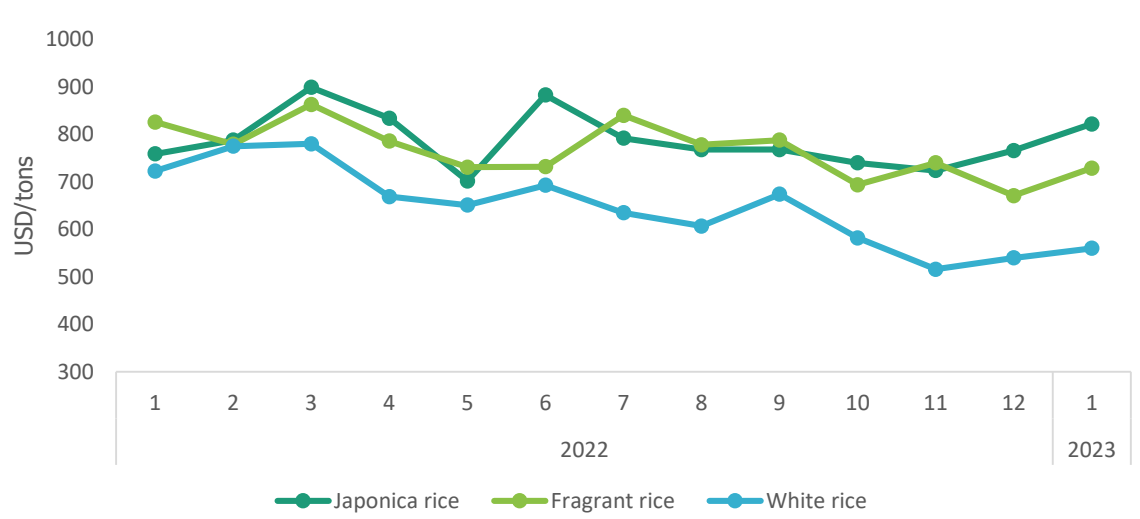


RICE

Structure of exports by products to the EU, Jan-2023



Average export rice price to the EU, Jan-2023



Export results to the EU, Jan-2023



Fragrant rice

Value: **2,0** mil. USD
 Decrease **10%** compared to Dec-2022
 Decrease **57%** compared to Jan-2022



Japonica rice

Value: **1,1** mil. USD
 Decrease **50%** compared to Dec-2022
 Decrease **31%** compared to Jan-2022



Sticky rice

Value: **0,6** mil. USD
 Decrease **34%** compared to Dec-2022
 Increase **87%** compared to Jan-2022

Japonica rice

The average export price in Jan-2023 is **822 USD/tons**; **increases 7%** compared to the previous month; and **increases 8%** compared to the same period of 2022.

Fragrant rice

The average export price in Jan-2023 is **729 USD/tons**; **increases 9%** compared to the previous month; and **decreases 12%** compared to the same period of 2022.

White rice

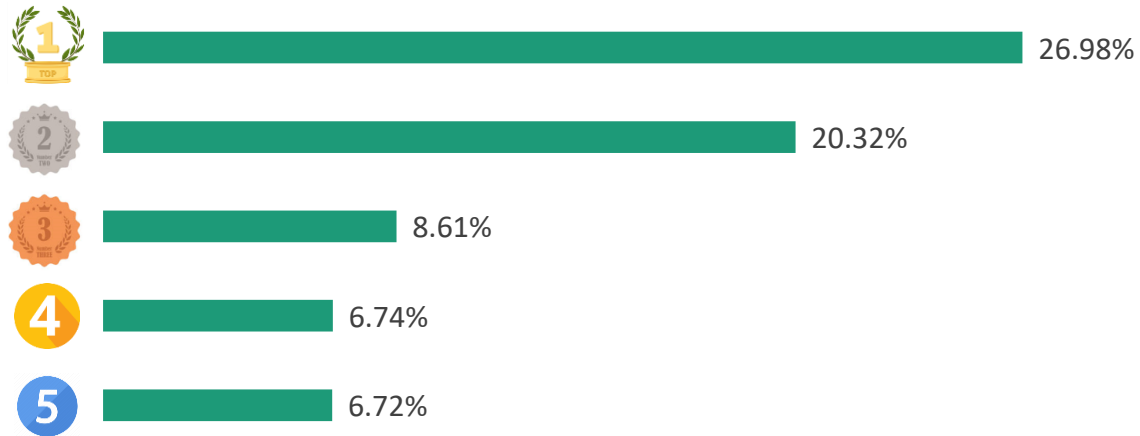
The average export price in Jan-2023 is **560 USD/tons**; **increases 4%** compared to the previous month; and **decreases 23%** compared to the same period of 2022.

Source: Calculated from data of the General Department of Customs

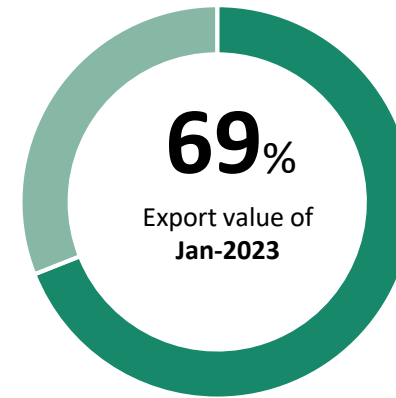


RICE

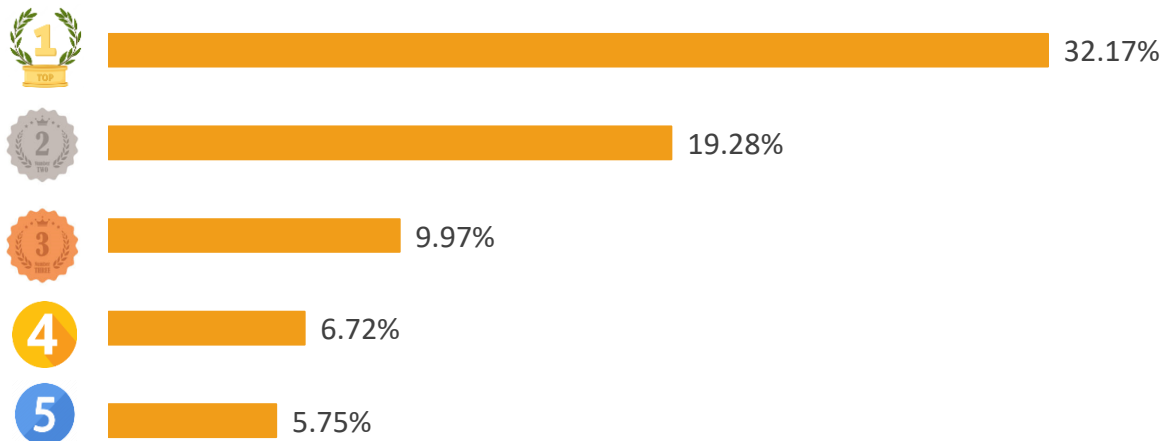
TOP 5 export enterprises by value to the EU, Jan-2023



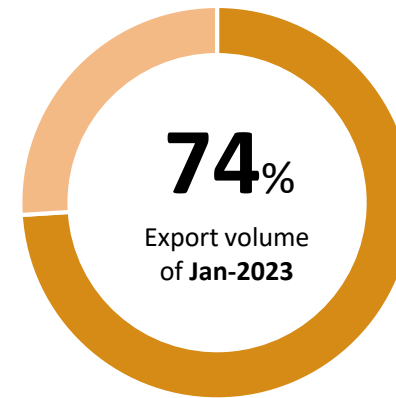
Value ratio of TOP 5 export enterprises to the EU, Jan-2023



TOP 5 export enterprises by volume to the EU, Jan-2023



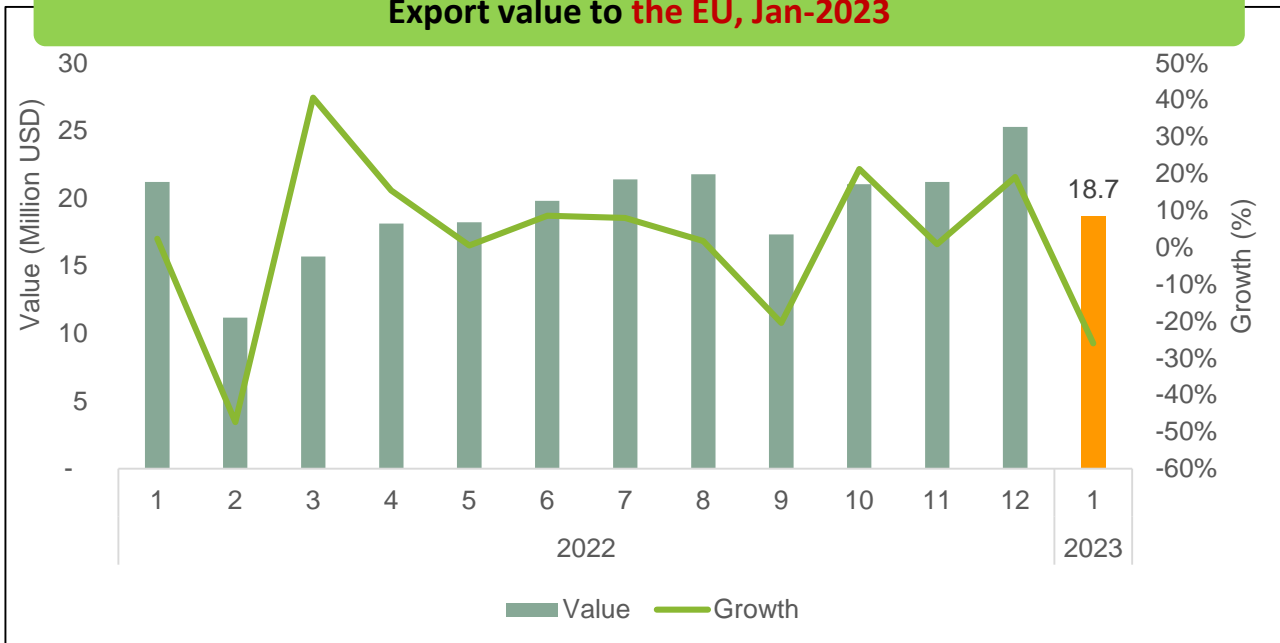
Volume ratio of TOP 5 export enterprises to the EU, Jan-2023





FRUITS AND VEGETABLES (EXPORT)

Export value to the EU, Jan-2023



Export results to the EU, Jan-2023



VALUE
18.7

mil. USD

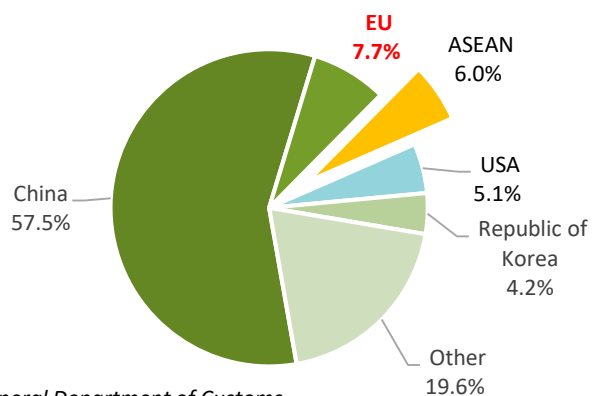
Decrease **26.0%** compared to Dec-2022

Decrease **11.8%** compared to Jan-2022

0.66 mil. USD less than the monthly average rate in 2022

Export value in Jan-2023 is **8.0%** of total 2022

Percentage of export value to the EU, Jan-2023



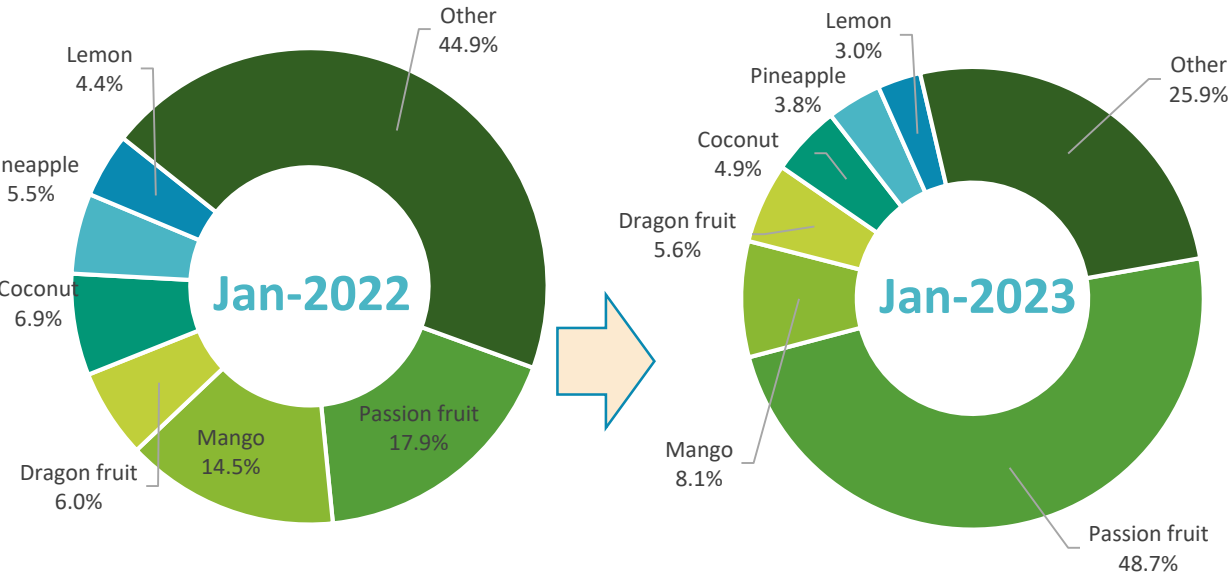
Changes in percentage of export value to the EU, Jan-2023





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the EU, Jan-2023



Export results of some main products to the EU, Jan-2023



Passion fruit

Value: **9.1** mil. USD
 Decrease **17.9%** compared to Dec-2022
 Increase **140.2%** compared to Jan-2022



Mango

Value: **1.5** mil. USD
 Decrease **40.7%** compared to Dec-2022
 Decrease **50.8%** compared to Jan-2022



Dragon fruit

Value: **1.0** mil. USD
 Decrease **37.2%** compared to Dec-2022
 Decrease **17.9%** compared to Jan-2022



Coconut

Value: **0.9** mil. USD
 Increase **1.8%** compared to Dec-2022
 Decrease **37.2%** compared to Jan-2022



Pineapple

Value: **0.7** mil. USD
 Decrease **25.9%** compared to Dec-2022
 Decrease **38.2%** compared to Jan-2022



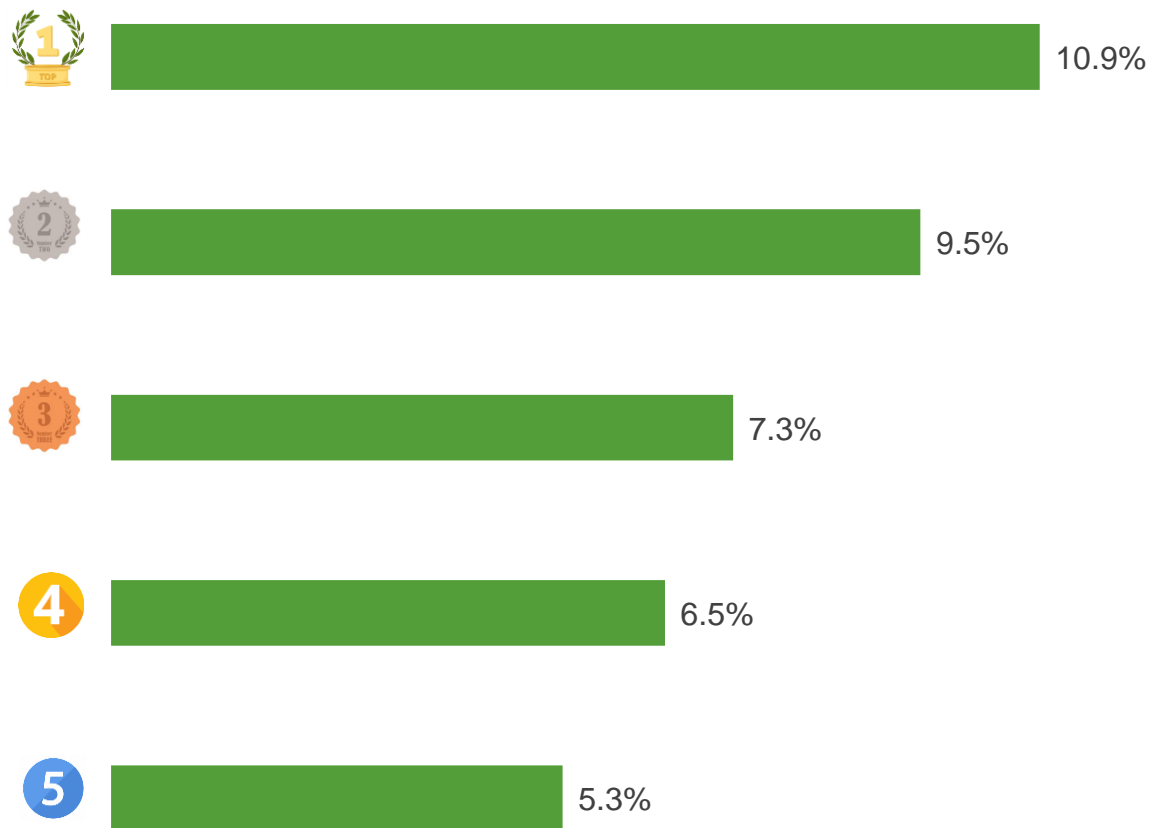
Lemon

Value: **0.6** mil. USD
 Decrease **36.8%** compared to Dec-2022
 Decrease **39.1%** compared to Jan-2022

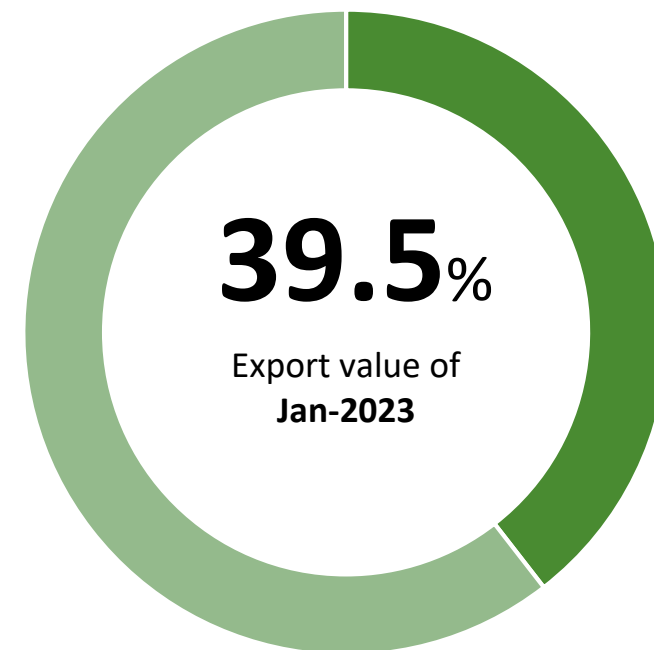


FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to the EU, Jan-2023



Value ratio of TOP 5 export enterprises to the EU, Jan-2023





FRUITS AND VEGETABLES (IMPORT)

Import value from the EU, Jan-2023



Import results from the EU, Jan-2023

VALUE

6.1

mil. USD

Decrease **35.8%** compared to Dec-2022

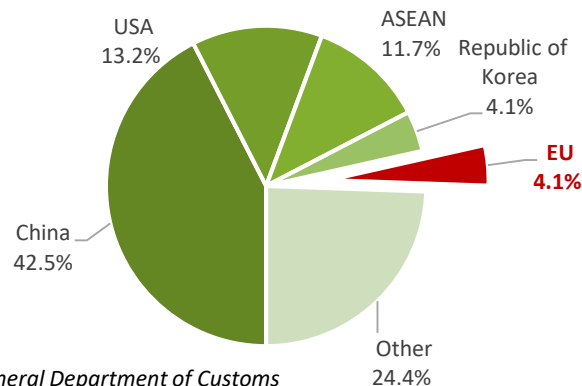
Increase **16.5%** compared to Jan-2022

1.9 mil. USD more than the monthly average rate in 2022

Import value in Jan-2023 is **29.8%** of total 2022



Percentage of import value from the EU, Jan-2023



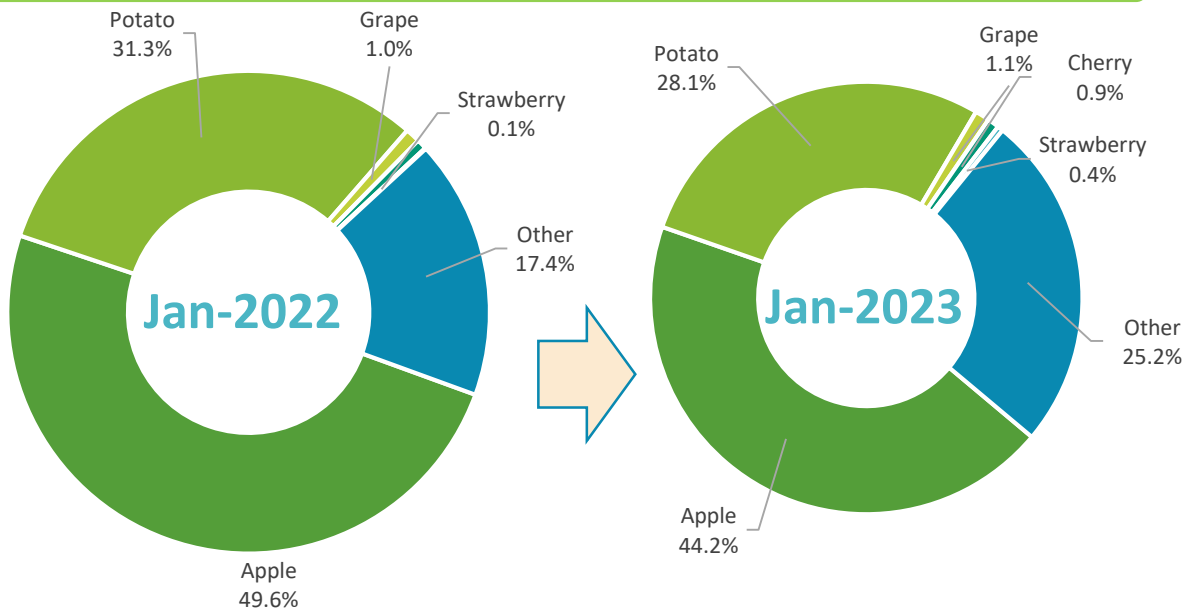
Changes in percentage of import value from the EU, Jan-2023





FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the EU, Jan-2023



Import results of some main products from the EU, Jan-2023



Apple

Value: **2.7** mil. USD

Decrease **35.6%** compared to Dec-2022

Increase **3.9%** compared to Jan-2022



Potato

Value: **1.7** mil. USD

Decrease **52.2%** compared to Dec-2022

Increase **4.8%** compared to Jan-2022



Grape

Value: **65.4** thousand USD

Decrease **60.5%** compared to Dec-2022

Increase **28.2%** so compared to Jan-2022



Cherry

Value: **53.2** thousand USD

Increase **30 times** compared to Dec-2022

Increase **50.7%** compared to Jan-2022



Strawberry

Value: **25.9** thousand USD

Decrease **8.8%** compared to Dec-2022

Increase **707.3%** so compared to Jan-2022

FRUITS AND VEGETABLES

SPOTLIGHTS

01

According to Fruitnet.com, although vegetable prices in the EU market have increased, the supply still cannot meet Spain's vegetable demand due to a decrease in output. The reason is that prolonged cold weather caused production to decrease sharply, especially in Almería - which accounts for 40% of Spain's vegetable exports.

Source: *Frutnet.com*

02

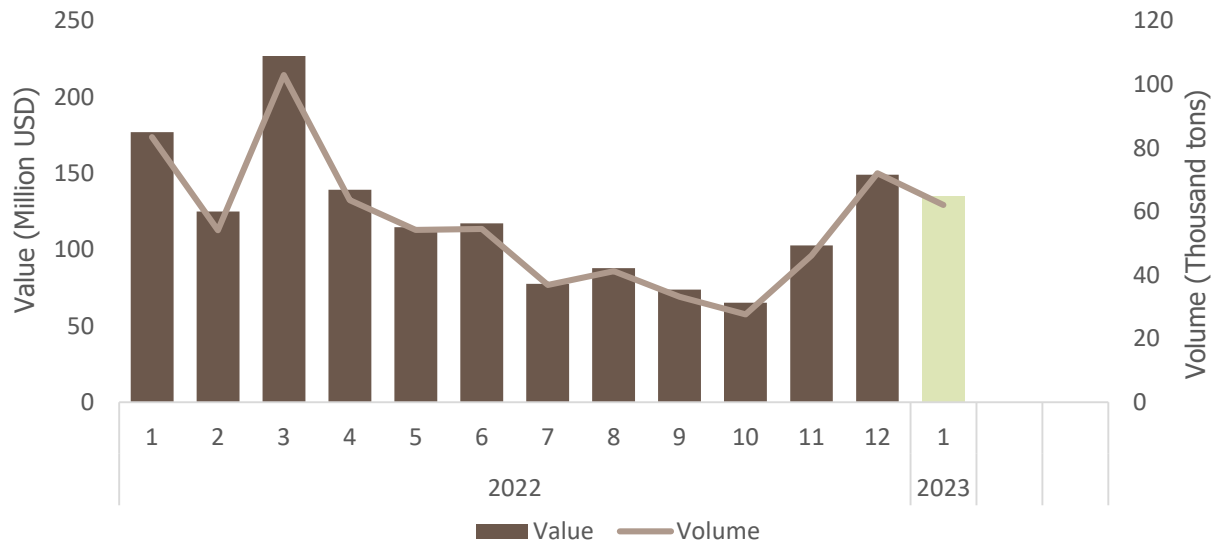
According to the USDA, EU fresh apple production is forecast to increase by 500,000 tons to 12.8 million tons as France and Italy recover from last year's frost damage and leading producer Poland continues to increase production. Greater supplies are predicted to lift exports by 100,000 tons to 1.3 million tons and increase consumption by nearly 400,000 tons to 11.8 million tons. Rising cold storage costs are expected to divert large quantities of lower-value fruit to processing rather than holding for export. Imports are expected to decrease by 11,000 tons, to 320,000 tons, as larger domestic supplies reduce import demand.

Source: *USDA*



COFFEE

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE

135

mil. USD

Decrease 9.5% compared to Dec-2022

Decrease 23.7% compared to Jan-2022

13.6 mil. USD more than the monthly average rate in 2022

Export value in Jan-2023 is 9.3% of total 2022

VOLUME

62.1

thousand tons

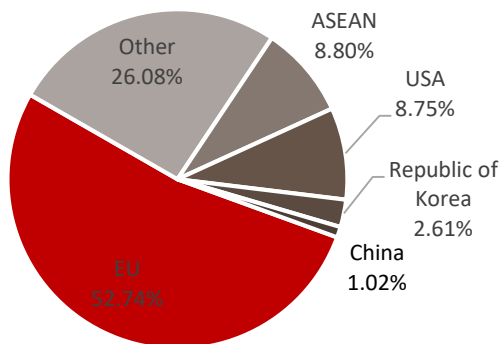
Decrease 13.8% compared to Dec-2022

Decrease 25.5% compared to Jan-2022

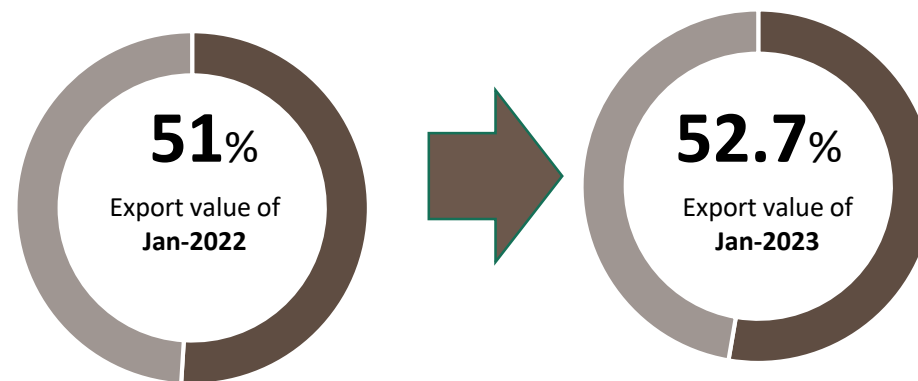
6.2 thousand tons more than the monthly average rate in 2022

Export value in Jan-2023 is 32.9% of total 2022

Percentage of export value to the EU, Jan-2023



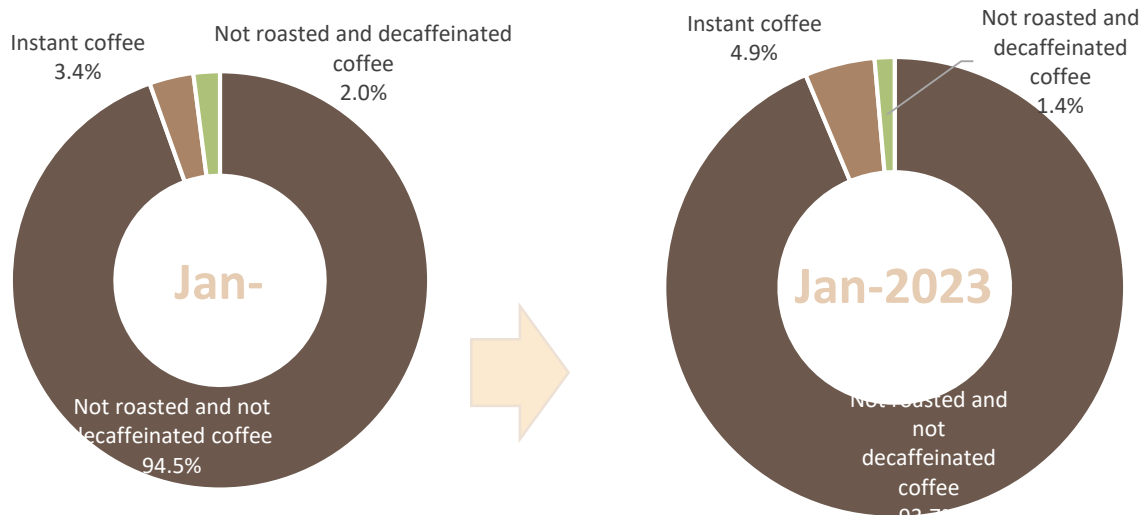
Changes in percentage of export value to the EU, Jan-2023



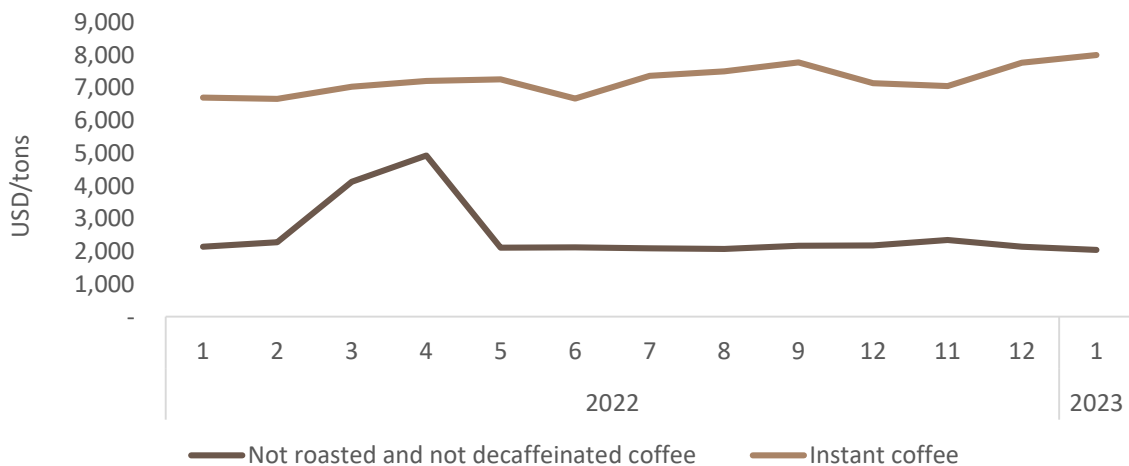
Source: Calculated from data of the General Department of Customs

COFFEE

Structure of exports by products to the EU, Jan-2023



Average export price to the EU, Jan-2023



Export results to the EU, Jan-2023



Not roasted and not decaffeinated coffee

Value: **129,6** mil. USD

Decrease **8,7%** compared to Dec-2022

Decrease **21,6%** compared to Jan-2022

Instant coffee

Value: **6,8** mil. USD

Increase **16,5%** compared to Dec-2022

Increase **13,9%** compared to Jan-2022

Not roasted and decaffeinated coffee

Value: **1,9** mil. USD

Decrease **57,8%** compared to Dec-2022

Decrease **45,7%** compared to Jan-2022

Instant coffee

The average export price in Jan-2023 is **7,762** USD/tons; **decreases 3%** compared to the previous month; and **increases 15.9%** compared to the same period of 2022.

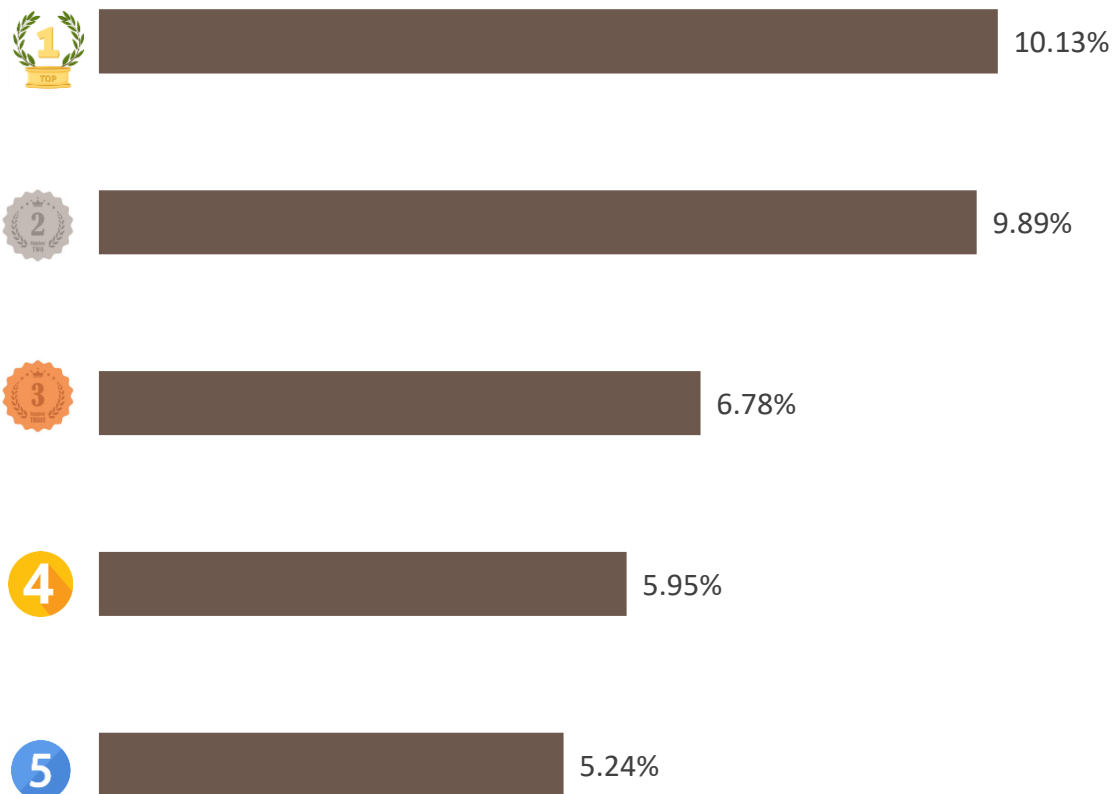
Not roasted and not decaffeinated coffee

The average export price in Jan-2023 is **2,137** USD/tons; **decreases 49.6%** compared to the previous month; and **decreases 0.1%** compared to the same period of 2022.

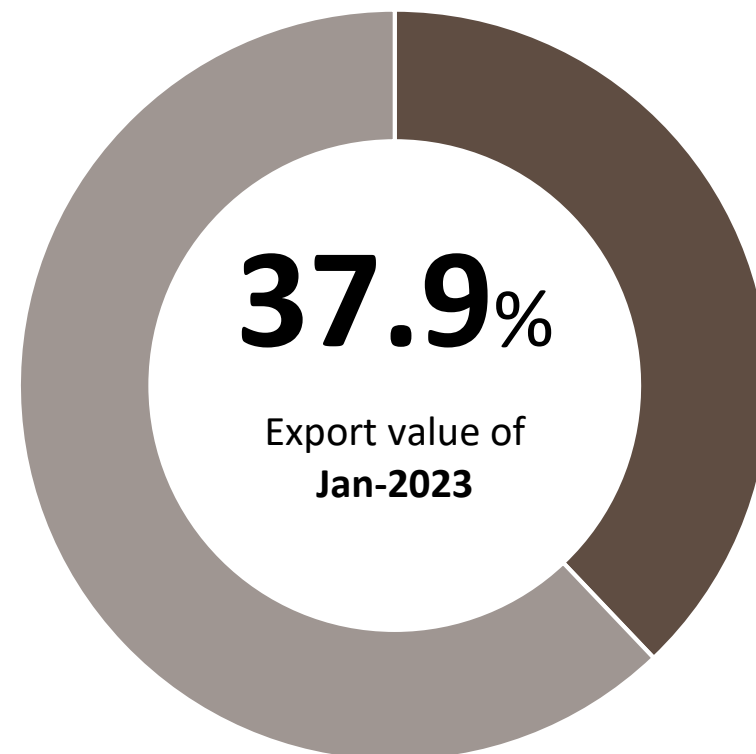


COFFEE

TOP 5 export enterprises by value to the EU, Jan-2023



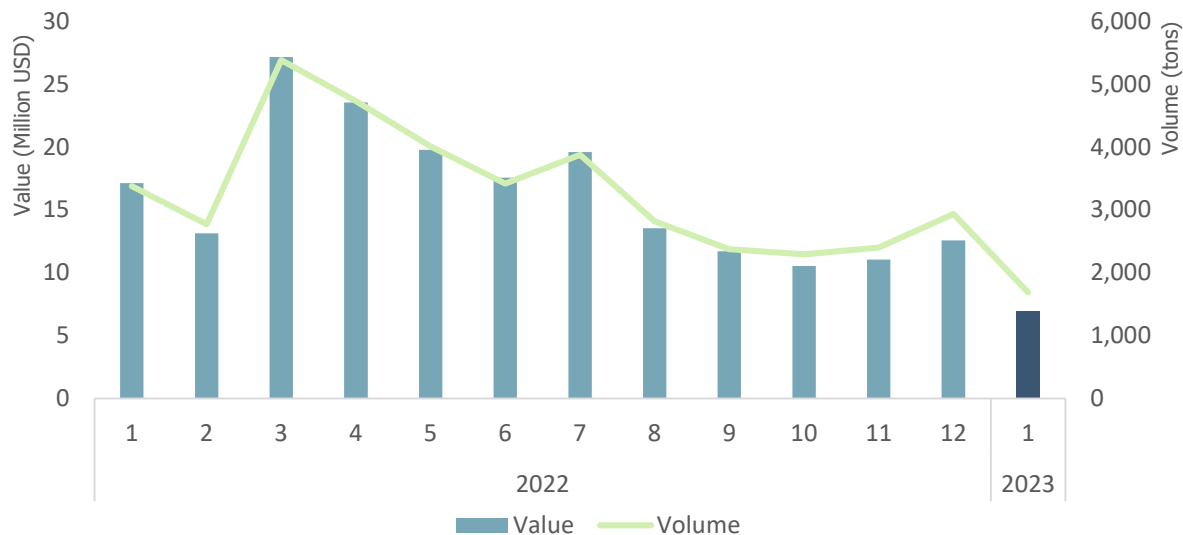
Value ratio of TOP 5 export enterprises to the EU, Jan-2023





PEPPER

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE

6.96 mil. USD

↓ Decrease **44.7%** compared to Dec-2022

↓ Decrease **59.4%** compared to Jan-2022

↓ **9.4 mil. USD** less than the monthly average rate in 2022

VOLUME

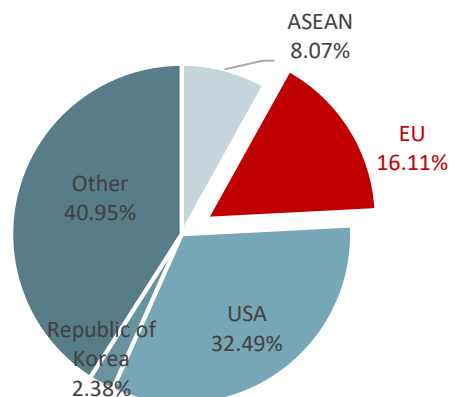
1,687 tons

↓ Decrease **42.5%** compared to Dec-2022

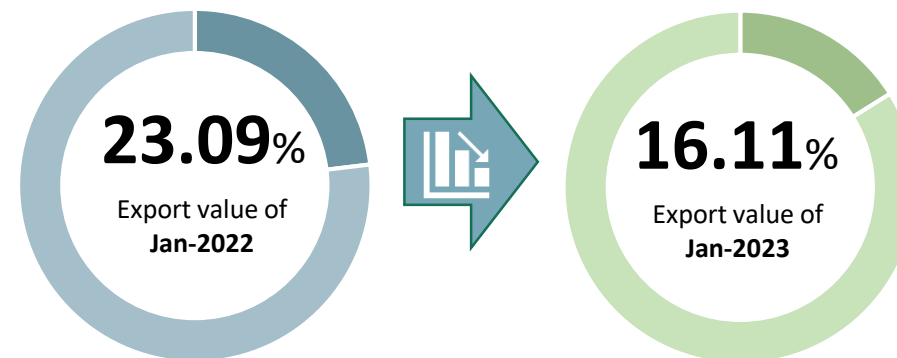
↓ Decrease **50%** compared to Jan-2022

↑ **1,680 tons** more than the monthly average rate in 2022

Percentage of export value to the EU, Jan-2023



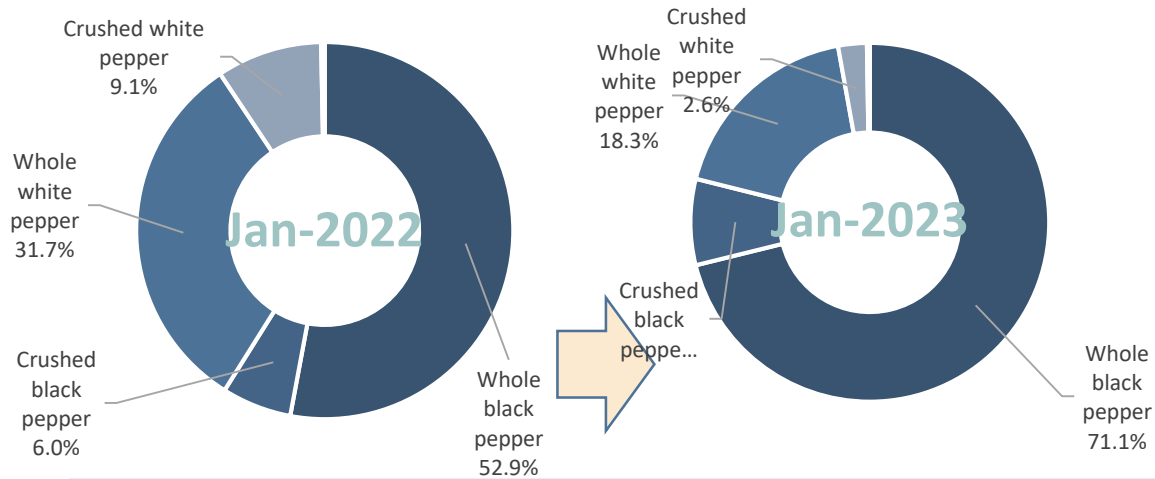
Changes in percentage of export value to the EU, Jan-2023



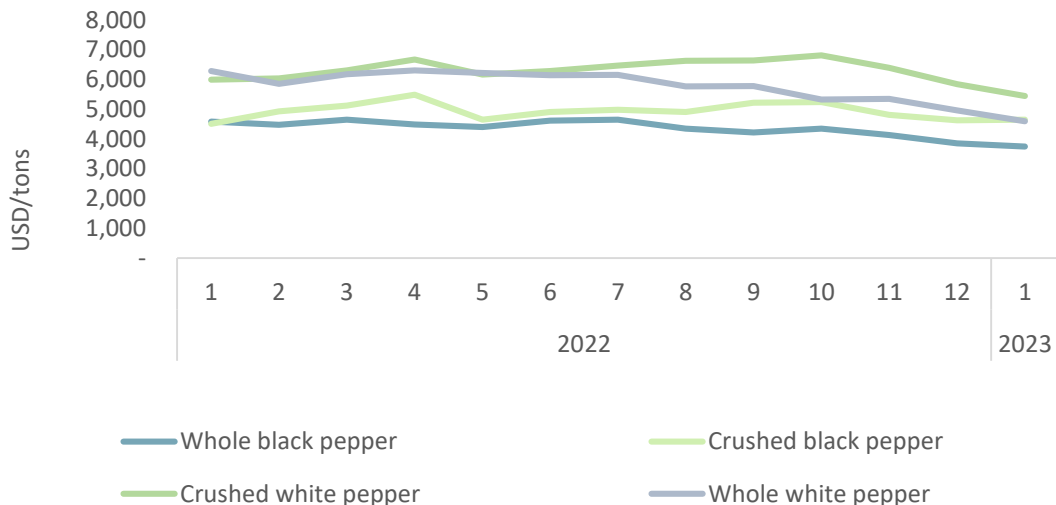


PEPPER

Structure of exports by products to the EU, Jan-2023



Average export price to the EU, Jan-2023



Export results to the EU, Jan-2023



Whole black pepper

Value: **4.95** mil. USD
 Decrease **25.02%** compared to Dec-2022
 Decrease **45.37%** compared to Jan-2022

Crushed black pepper

Value: **540** thousand USD
 Decrease **66.94%** compared to Dec-2022
 Decrease **47.3%** compared to Jan-2022

Whole white pepper

Value: **1.271** mil. USD
 Decrease **52.24%** compared to Dec-2022
 Decrease **76.61%** compared to Jan-2022

Crushed white pepper

Value: **180** thousand USD
 Decrease **88.9%** compared to Dec-2022
 Decrease **88.43%** compared to Jan-2022

Whole black pepper

The average export price in Jan-2023 is **3,740** USD/tons; **decreases 2.9%** compared to the previous month; and **decreases 18.4%** compared to the same period of 2022.

Whole white pepper

The average export price in Jan-2023 is **4,592** USD/tons; **decreases 7.3%** compared to the previous month; and **decreases 26.9%** compared to the same period of 2022.

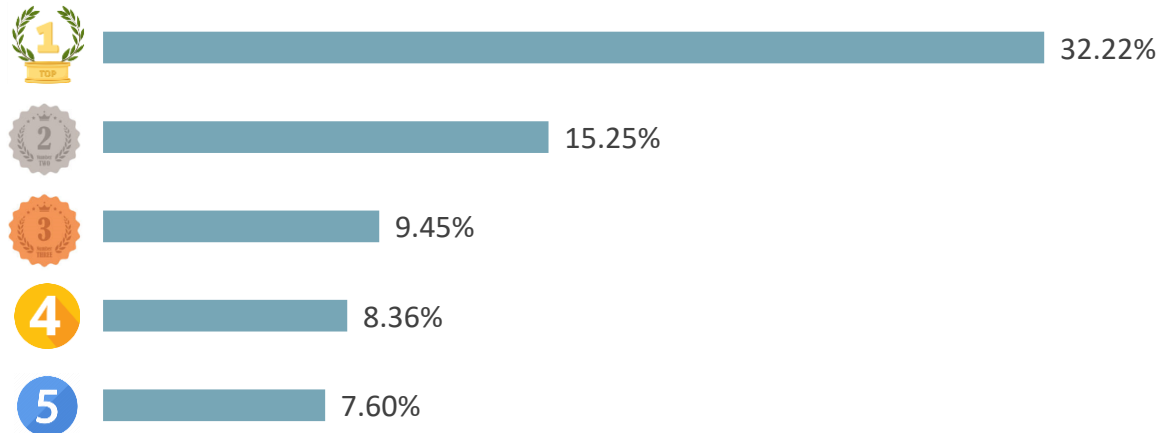
Crushed white pepper

The average export price in Jan-2023 is **5,440** USD/tons; **decreases 6.7%** compared to the previous month; and **decreases 9.1%** compared to the same period of 2022.

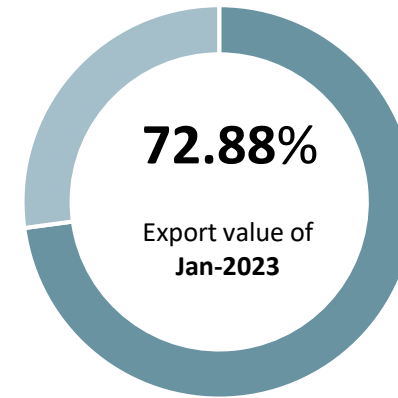


PEPPER

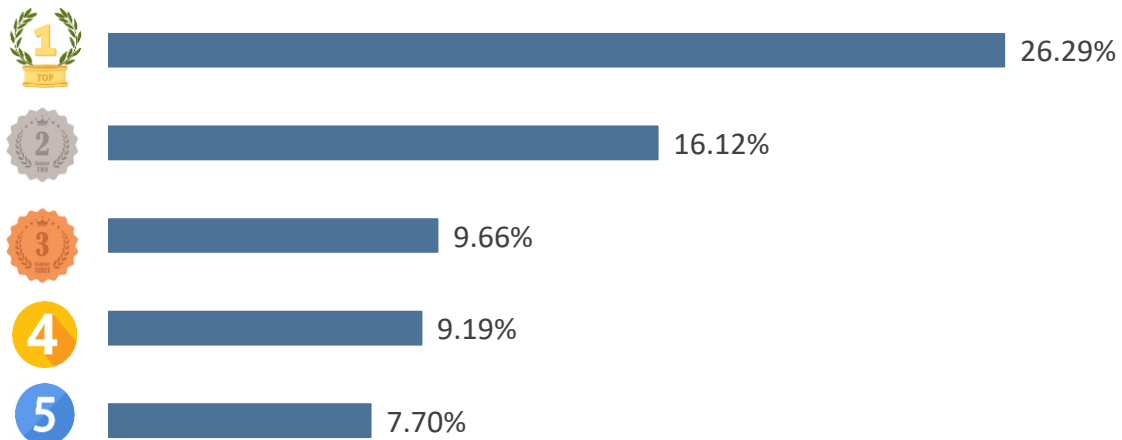
TOP 5 export enterprises by value to the EU, Jan-2023



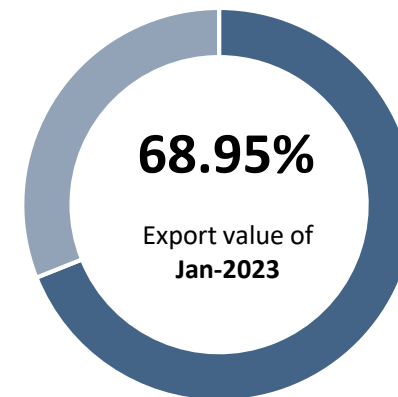
Value ratio of TOP 5 export enterprises to the EU, Jan-2023



TOP 5 export enterprises by volume to the EU, Jan-2023



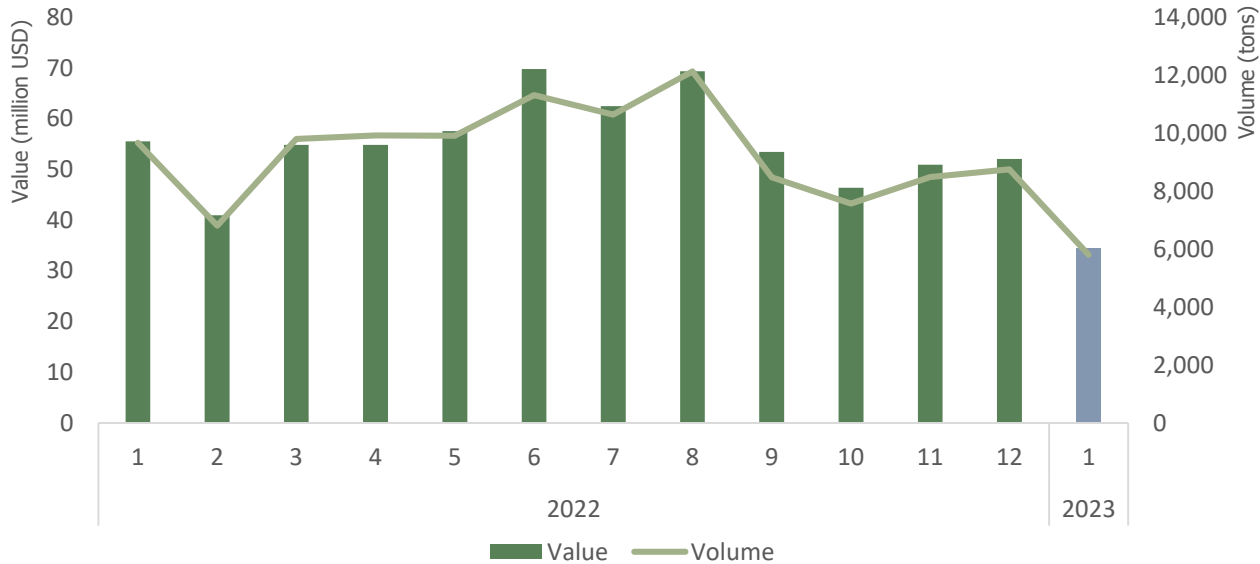
Volume ratio of TOP 5 export enterprises to the EU, Jan-2023





CASHEW NUTS

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE

34.42 mil. USD

↓ Decrease **33.8%** compared to Dec-2022

↓ Decrease **38%** compared to Jan-2022

↓ **21.2 mil. USD** less than the monthly average rate in 2022

VOLUME

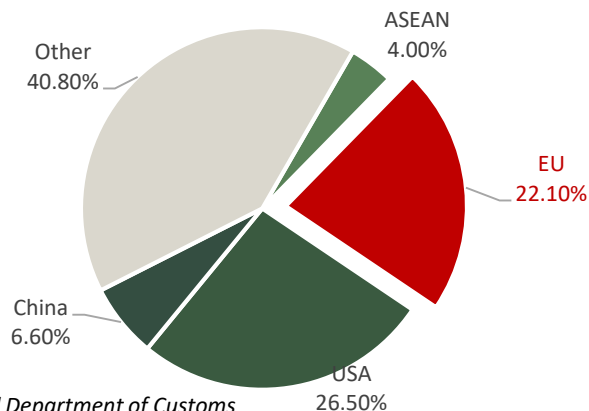
5,797 tons

↓ Decrease **33.8%** compared to Dec-2022

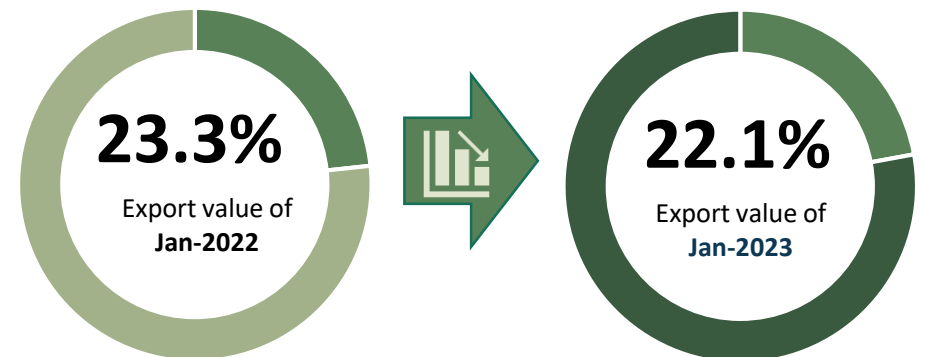
↓ Decrease **40%** compared to Jan-2022

↓ **3,658 tons** less than the monthly average rate in 2022

Percentage of export value to the EU, Jan-2023

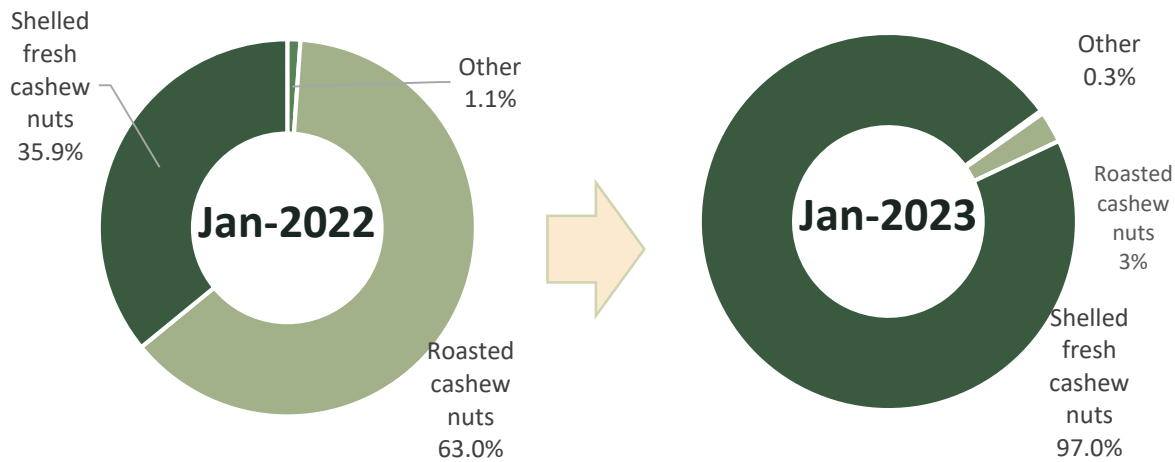


Changes in percentage of export value to the EU, Jan-2023





Structure of exports by products to the EU, Jan-2023



Average export price to the EU, Jan-2023



Export results to the EU, Jan-2023



Shelled fresh cashew nuts

Value: **33,39** mil. USD
 Decrease **34,34%** compared to Dec-2022
 Decrease **37,7%** compared to Jan-2022



Roasted cashew nuts

Value: **930** thousand USD
 Decrease **19,49%** compared to Dec-2022
 Decrease **51,25%** compared to Jan-2022

Shelled fresh cashew nuts

The average export price in Jan-2023 is **5,855** USD/tons; **decreases 0.7%** compared to the previous month; and **decreases 7.8%** compared to the same period of 2022.

Roasted cashew nuts

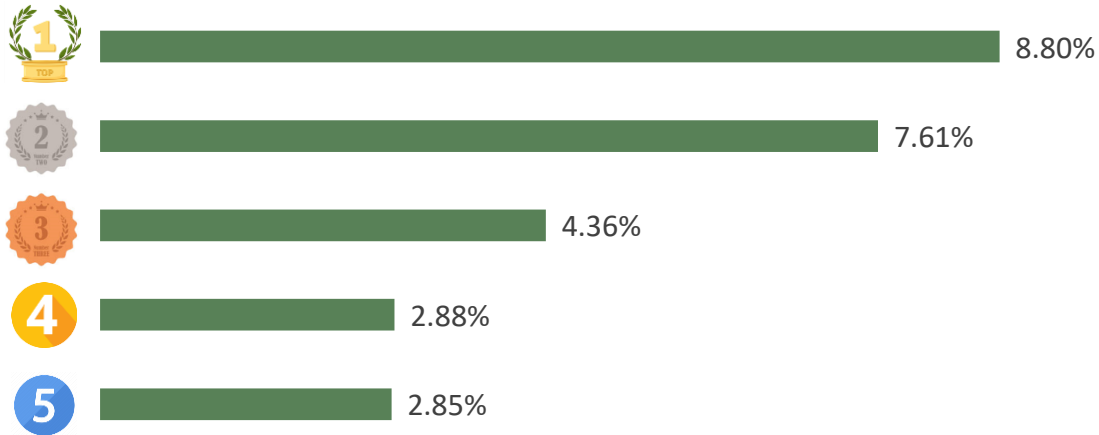
The average export price in Jan-2023 is **8,232** USD/tons; **increases 5.5%** compared to the previous month; and **decreases 4.5%** compared to the same period of 2022.

Source: Calculated from data of the General Department of Customs

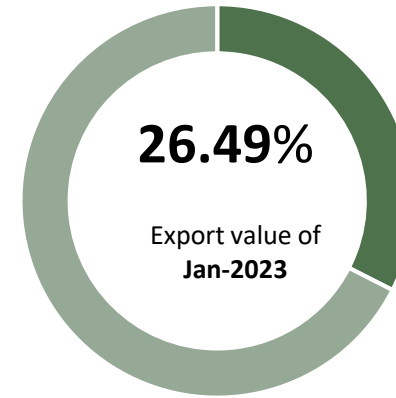


CASHEW NUTS

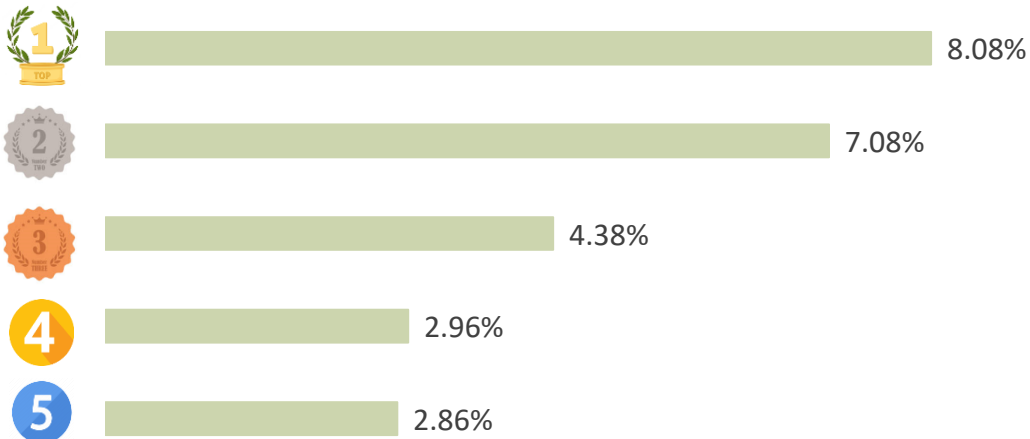
TOP 5 export enterprises by value to the EU, Jan-2023



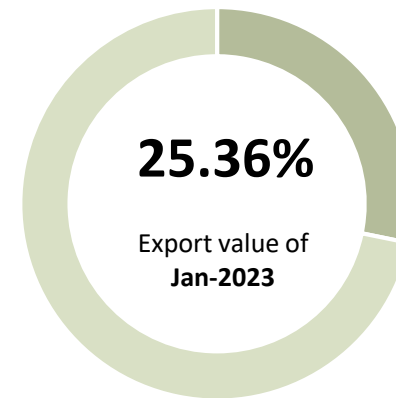
Value ratio of TOP 5 export enterprises to the EU, Jan-2023



TOP 5 export enterprises by volume to the EU, Jan-2023



Volume ratio of TOP 5 export enterprises to the EU, Jan-2023



CASHEW NUTS

SPOTLIGHTS



01

The Department of Trade Promotion - Ministry of Industry and Trade notes that the EU is currently paying great attention to green production and trade and green growth. From 2017 until now, many laws have been issued to achieve the Net-Zero goal, along with standards introduced for industries. Therefore, the cashew industry needs to pioneer in greening and practicing green production. Businesses need to focus on implementing traceability and building a value chain for the entire industry to ensure a "green" ticket to this market.

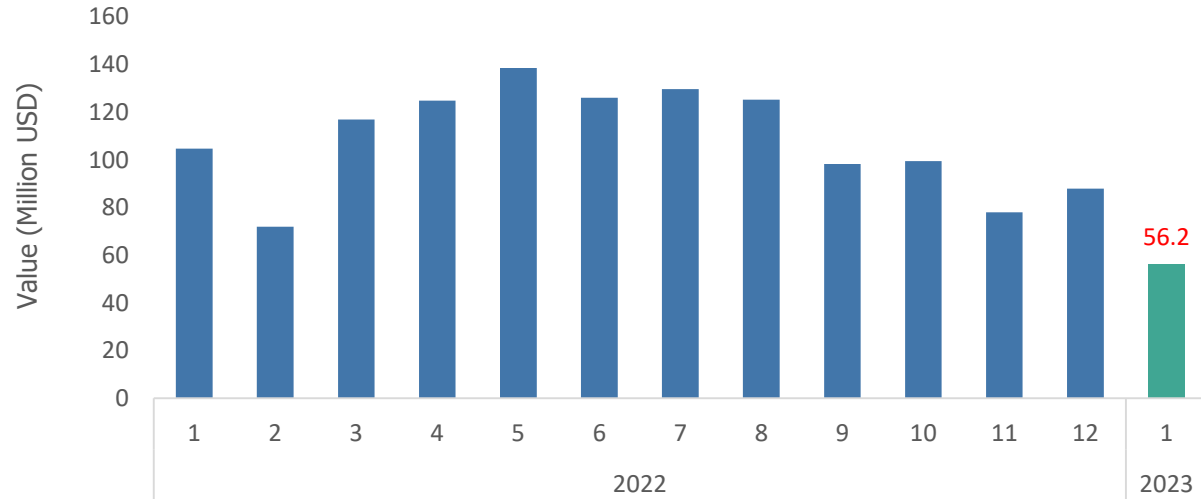
Source: Ministry of Industry and Trade (02/2023)





SEAFOOD

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE

56.2 *mil. USD*

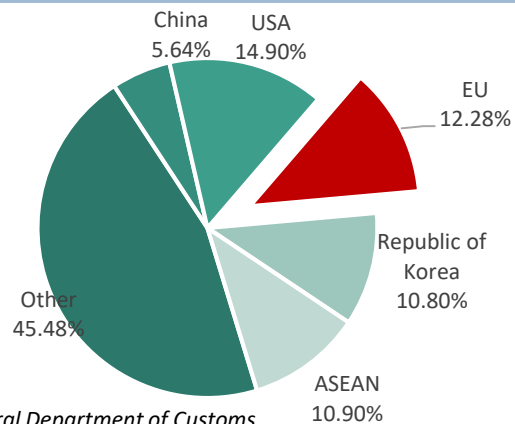


↘ Decrease **36.2%** compared to Dec-2022

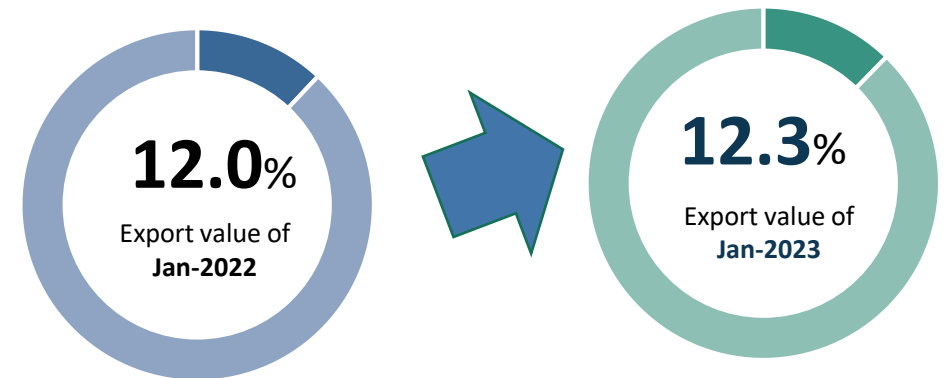
↘ Decrease **46.4%** compared to Jan-2022

↓ **52.3 mil. USD** less than the monthly average rate in 2022

Percentage of export value to the EU, Jan-2023



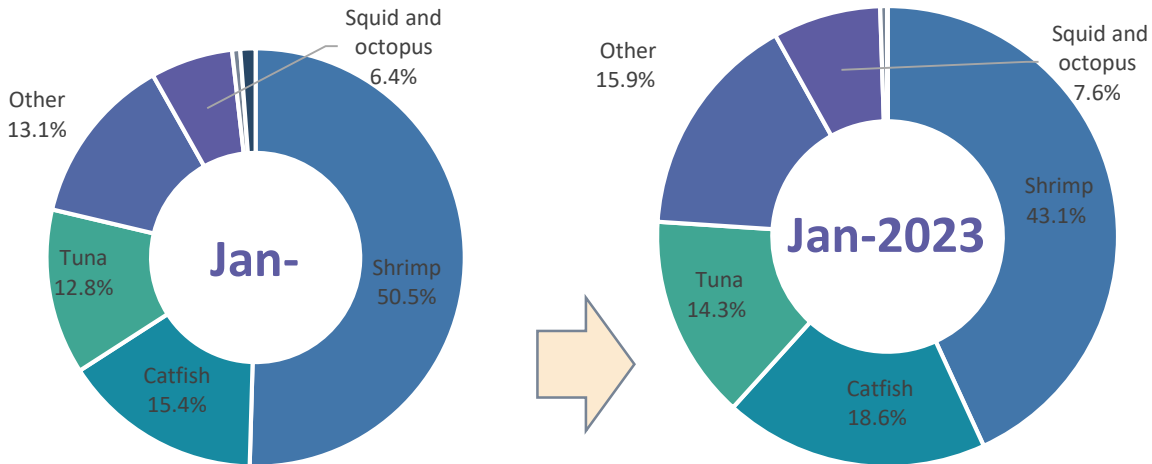
Changes in percentage of export value to the EU, Jan-2023



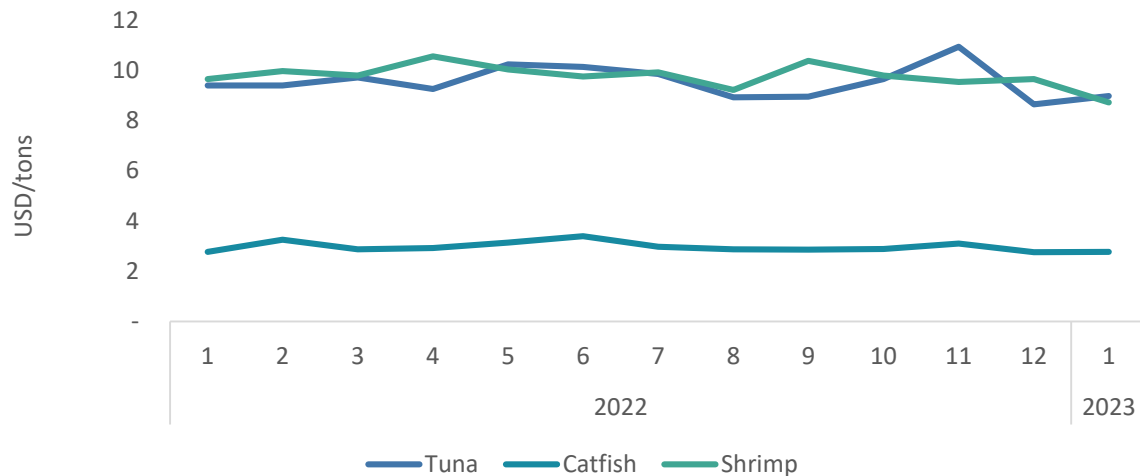


SEAFOOD

Structure of exports by products to the EU, Jan-2023



Average export price to the EU, Jan-2023



Export results to the EU, Jan-2023



Shrimp

Value: **24.1** mil. USD

Decrease **33.3%** compared to Dec-2022

Decrease **54.3%** compared to Jan-2022



Catfish

Value: **10.4** mil. USD

Decrease **42.8%** compared to Dec-2022

Decrease **35.8%** compared to Jan-2022



Tuna

Value: **8.0** mil. USD

Decrease **42.1%** compared to Dec-2022

Decrease **40.2%** compared to Jan-2022

Tuna

The average export price in Jan-2023 is **9.0 USD/kg**; **decreases 2.2%** compared to the previous month; and **decreases 4.5%** compared to the same period of 2022.

Catfish

The average export price in Jan-2023 is **2.8 USD/kg**; **increases 0.4%** compared to the previous month; and **decreases 0.1%** compared to the same period of 2022.

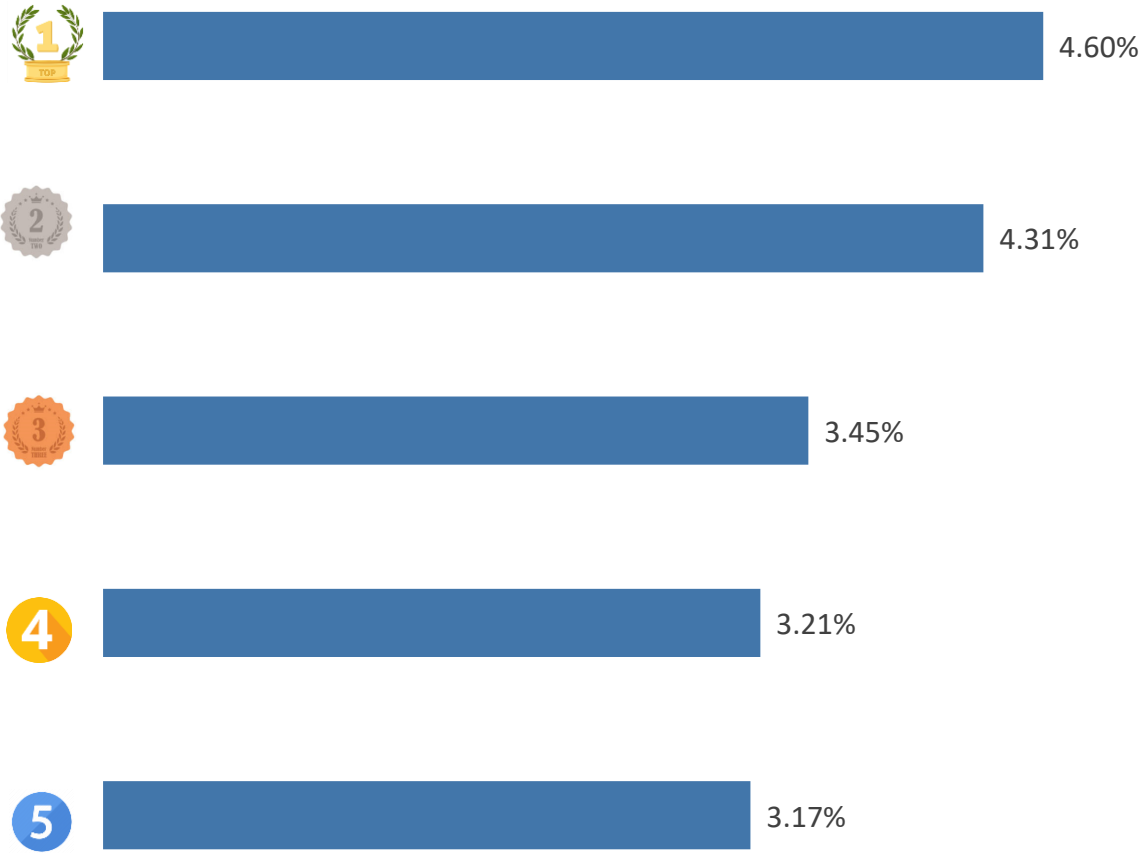
Shrimp

The average export price in Jan-2023 is **8.7 USD/kg**; **decreases 9.7%** compared to the previous month; and **decreases 9.7%** compared to the same period of 2022.

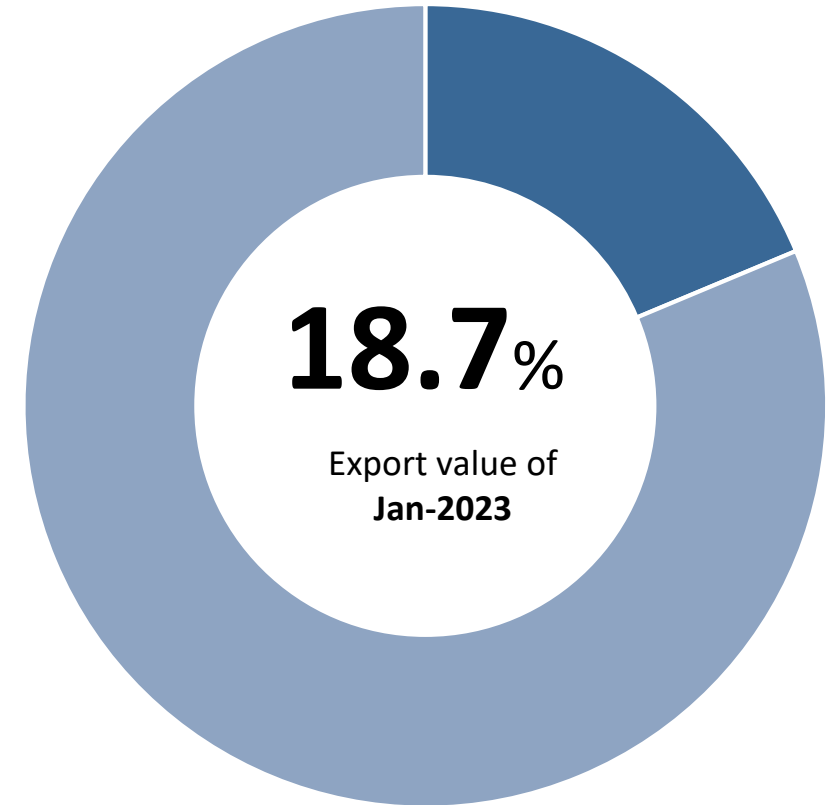


SEAFOOD

TOP 5 export enterprises by value to the EU, Jan-2023



Value ratio of TOP 5 export enterprises to the EU, Jan-2023



SPOTLIGHTS



01

EU-Norway quota negotiations continue to stagnate

The Irish Fish Producers Organization (IFPO) has accused Norway of delaying EU quota negotiations after "failing to secure exclusive access to blue cod in its exclusive economic zone of Ireland". Over the past seven years, IFPO claims, Norway has overfished blue cod by an average of more than 10% a year, exceeding its quota by almost 200,000 tons. Ireland asked Norway for a long-term win-win agreement, before considering any Norwegian demands for access to fish stocks on its coast.

Source: VASEP (2/2023)

02

Rising costs force restaurants in the UK to cut working hours and remove seafood from menus

UK restaurants, especially fish & chip restaurants, are affected by significant price increases for ingredients, including cooking oils and seafood. Its fish supply is affected by UK sanctions on Russian seafood.

Source: VASEP (2/2023)

03

MPEDA organizes conferences with G20 countries to promote shrimp trade to the EU

India's Seafood Export Development Authority (MPEDA) will organize a conference on "normalization of regulations" on fisheries with G20 countries. The main objective is to inform about trade regulations and export prospects in European countries. In the 2021/22 fiscal year ending March 31, 2022, the EU accounted for less than 15% of the total seafood export value from India (equivalent to 1.16 billion USD).

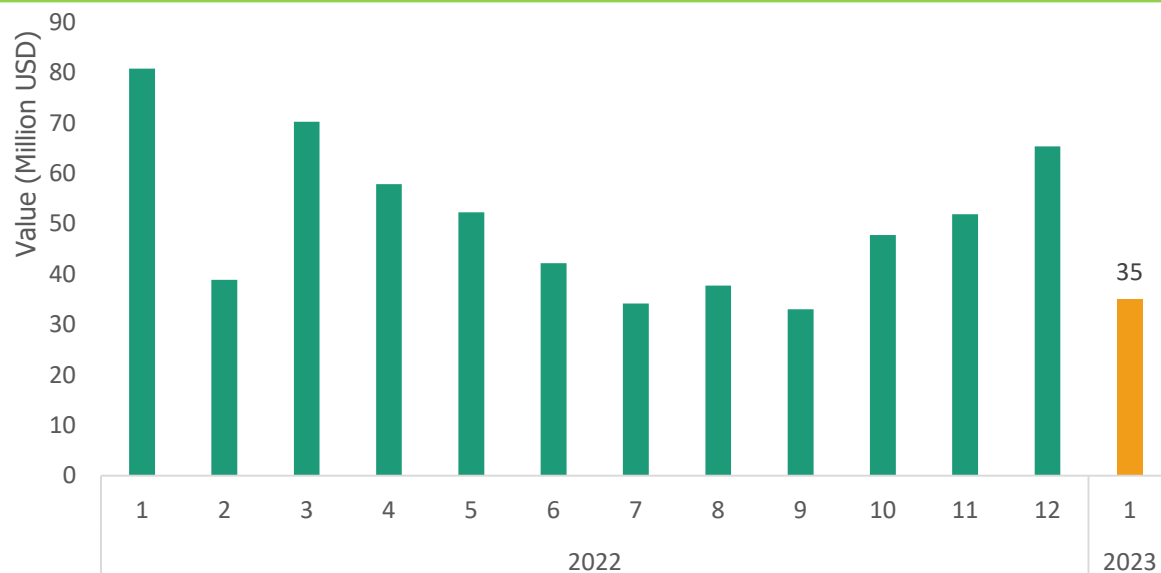
Source: VASEP (2/2023)





WOOD AND WOODEN PRODUCTS

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE



35

mil. USD

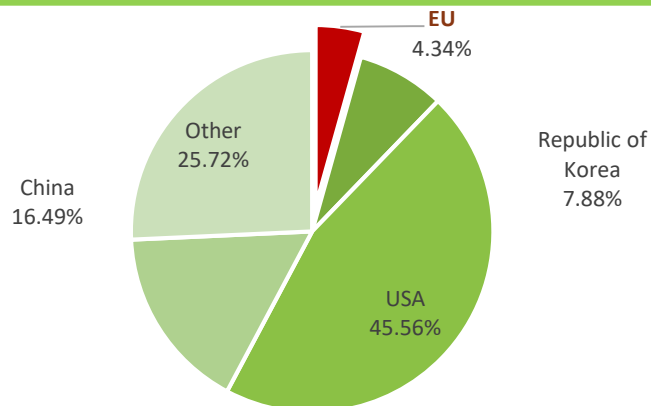
↘ Decrease **46.4%** compared to Dec-2022

↘ Decrease **56.7%** compared to Jan-2022

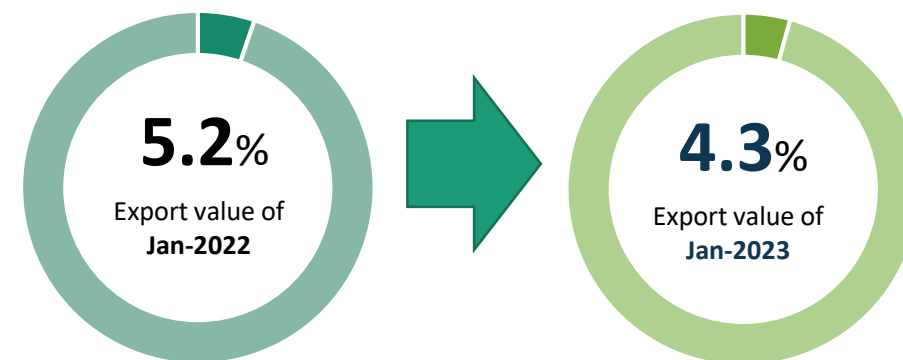
↘ **16 mil. USD** less than the monthly average rate in 2022

❖ **5.7%** of total 2022

Percentage of export value to the EU, Jan-2023



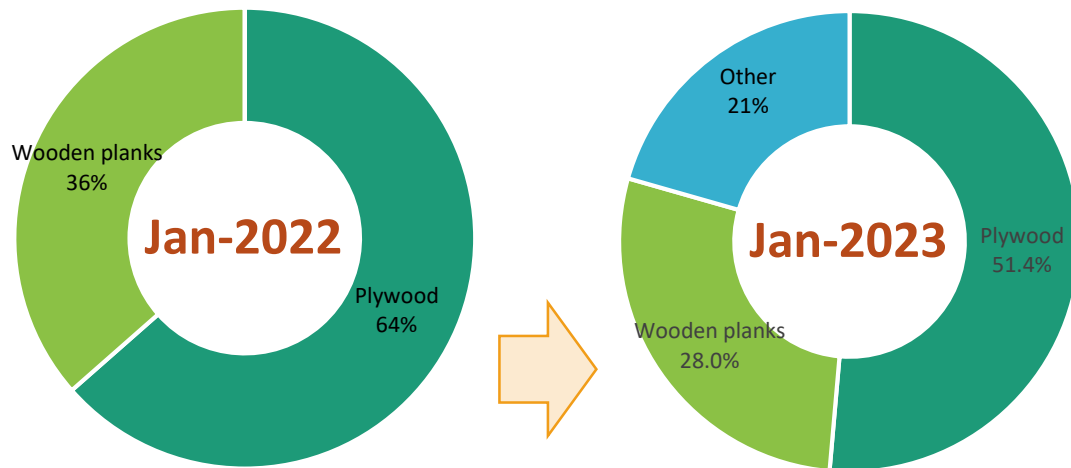
Changes in percentage of export value to the EU, Jan-2023





WOOD AND WOODEN PRODUCTS

Structure of exports by products to the EU, Jan-2023



Export results to the EU, Jan-2023



Plywood

Value: **399.015** USD
 Decrease **40%** compared to Dec-2022
 Decrease **53%** compared to Jan-2022



Wooden planks

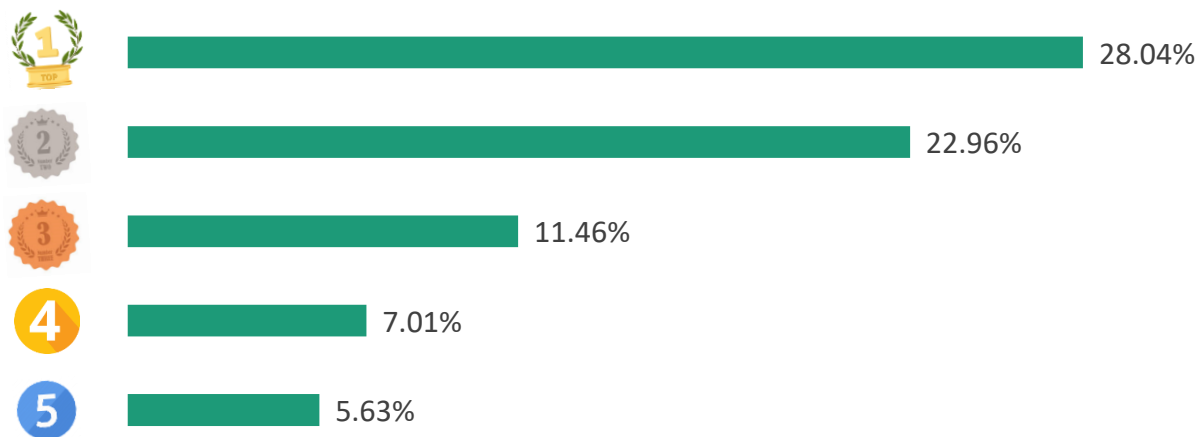
Value: **217.699** USD
 Decrease **37%** compared to Dec-2022
 Decrease **55%** compared to Jan-2022



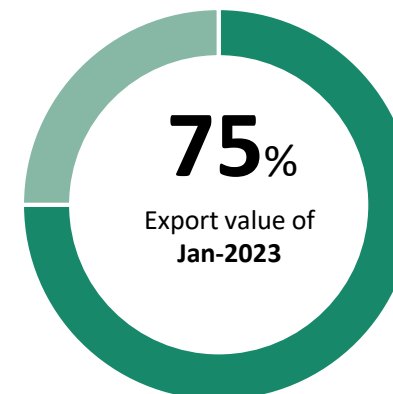
Woodchips

Value: **78.801** USD
 Decrease **99%** compared to Dec-2022
 Increase **100%** compared to Jan-2022

TOP 5 export enterprises by value to the EU, Jan-2023



Value ratio of TOP 5 export enterprises to the EU, Jan-2023





SPOTLIGHTS

EU imports of wooden furniture in 2022 are estimated to reach 1.73 billion USD, up 10% over the same period last year.

Source: ITTO

In 2022, EU roundwood imports reach 119,400 m³ with a value of 65 mil. USD, increased 11% in volume and 10% in turnover compared to the same period last year.

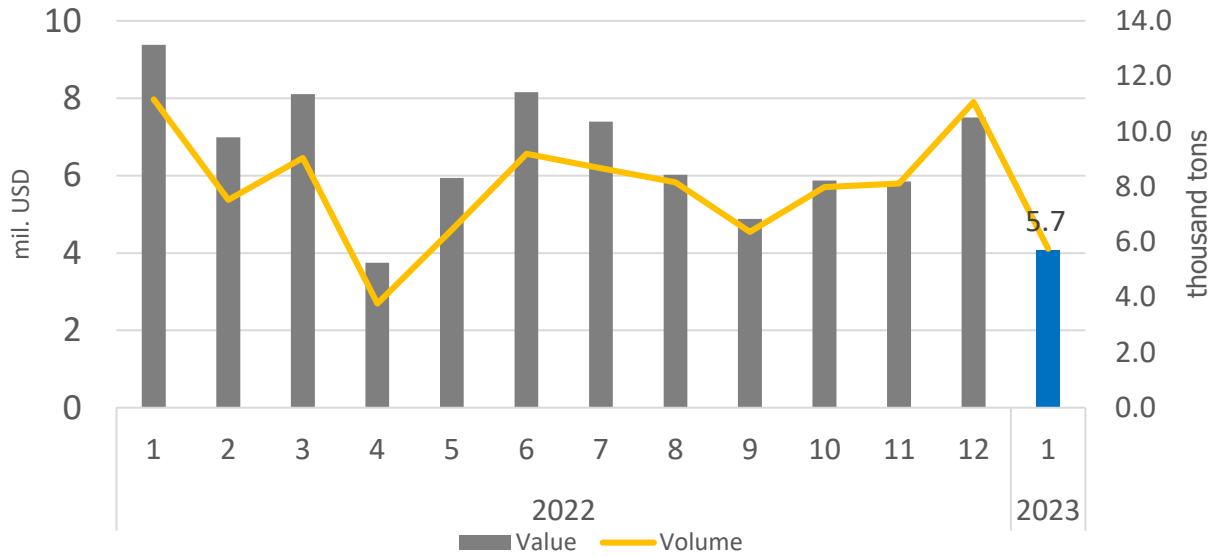
Source: ITTO





RUBBER

Export volume and value to the EU, Jan-2023



Export results to the EU, Jan-2023

VALUE

5.71 mil. USD

↗ Increase **45.6%** compared to Dec-2022

↘ Decrease **56.5%** compared to Jan-2022

↓ **3.6 mil. USD** less than the monthly average rate in 2022

❖ **11.3%** of total 2022

VOLUME

4.11 thousand tons

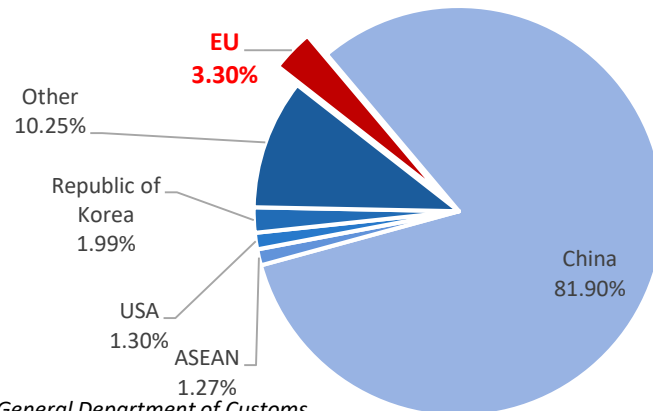
↘ Decrease **48.0%** compared to Dec-2022

↘ Decrease **48.5%** compared to Jan-2022

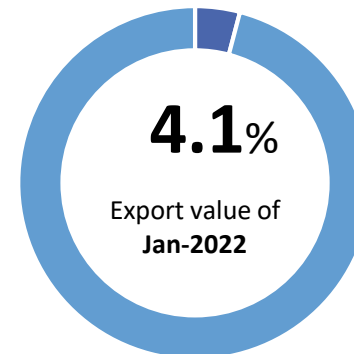
↓ **3,929 tons** less than the monthly average rate in 2022

❖ **14.2%** of total 2022

Percentage of export value to the EU, Jan-2023



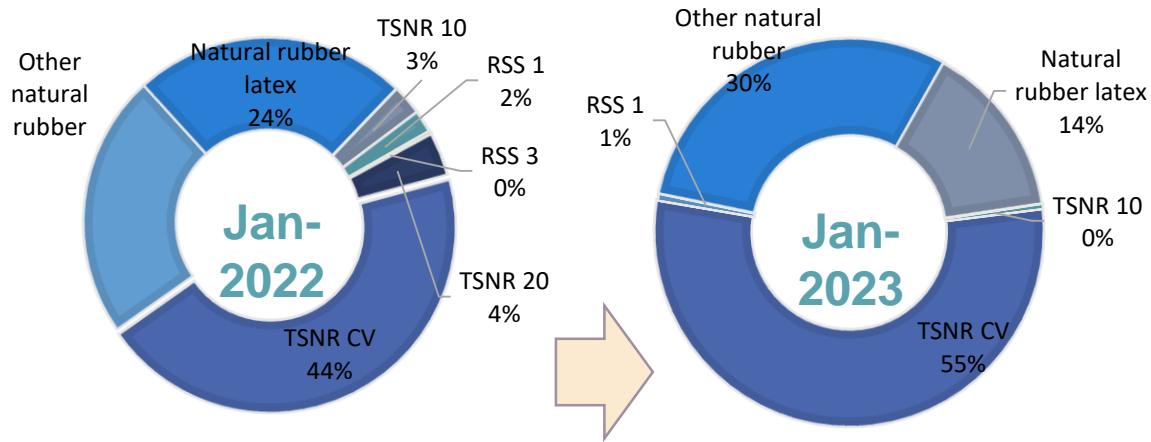
Changes in percentage of export value to the EU, Jan-2023





RUBBER

Structure of exports by products to the EU, Jan-2023



Export results to the EU, Jan-2023



Other natural rubber

Value: **1.82 mil. USD**

Increase **184.5%** compared to Dec-2022

Increase **35.1%** compared to Jan-2022



TSNR CV

Value: **3.33 mil. USD**

Decrease **25.0%** compared to Dec-2022

Decrease **46.0%** compared to Jan-2022



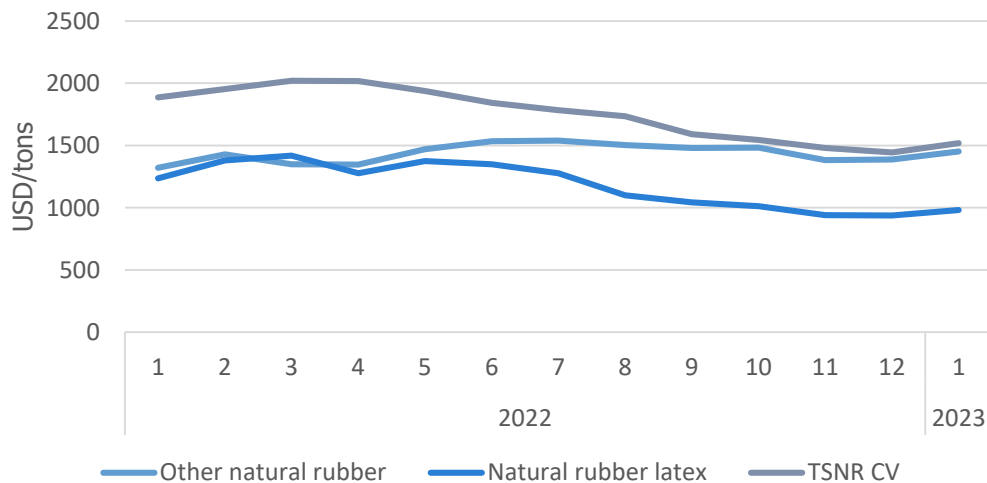
Natural rubber latex

Value: **0.88 mil. USD**

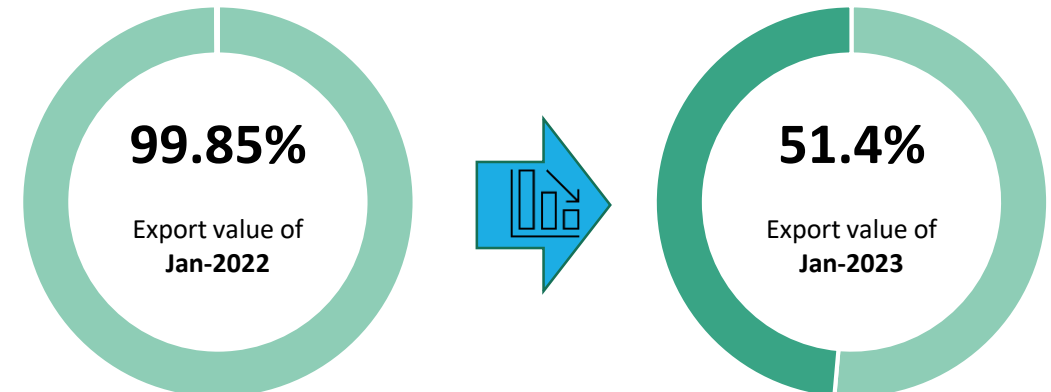
Decrease **54.3%** compared to Dec-2022

Decrease **73.3%** compared to Jan-2022

Average export price to the EU, Jan-2023



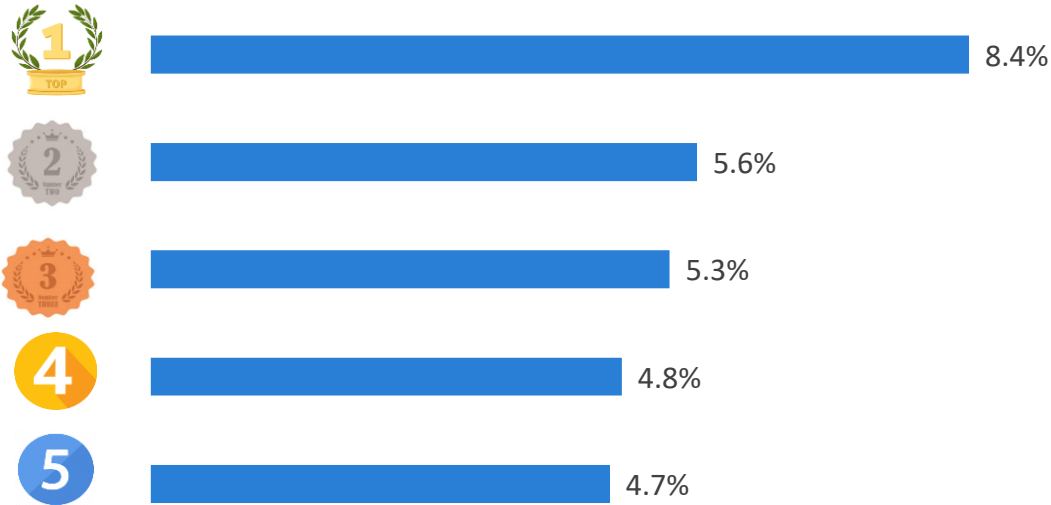
Changes in proportion of natural rubber in rubber exports to the EU, Jan-2023



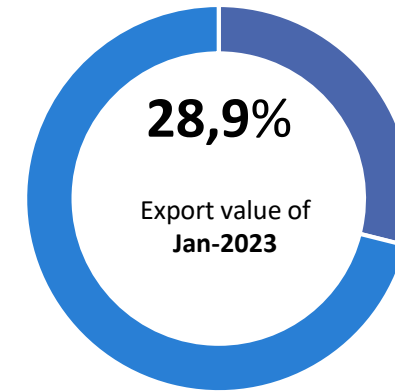


RUBBER

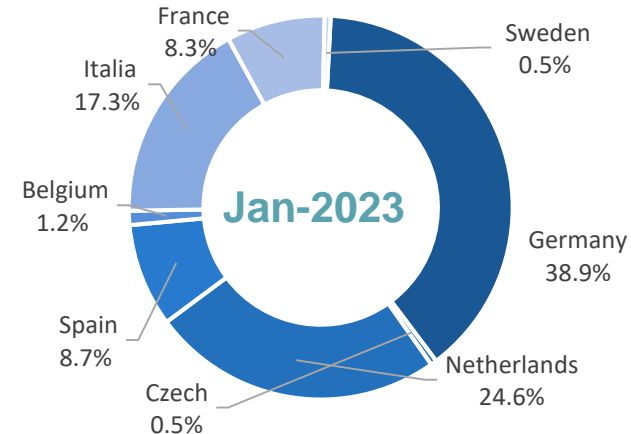
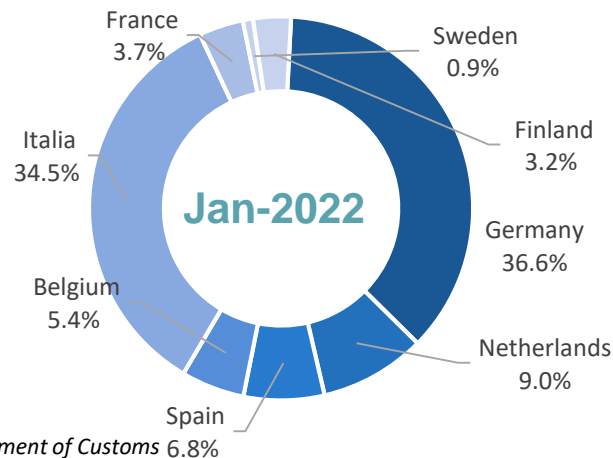
TOP 5 export enterprises by value to the EU, Jan-2023



Value ratio of TOP 5 export enterprises to the EU, Jan-2023



Changes in percentage of export value by countries, Jan-2023



A new statistic from Fitch Solutions Bank shows that rice production in 2023 could be recorded with the largest shortfall in 20 years. Accordingly, the EU's rice import demand is forecast to increase in 2023.

Rice



It is forecasted that in 2023, Vietnam's pepper exports will continue to face difficulties in the context of world prices under pressure due to low consumption demand. Pepper demand will decline strongly in the first quarter of 2023 with a very difficult winter in the EU region, due to the energy crisis. This time coincides with Vietnam's new crop being released to the market. Therefore, Vietnam's pepper industry needs to increase its ability to comply with international standards, especially on aspects such as chemical residues and sustainable economic, social and environmental production criteria. Besides, it is necessary to promote deep processing and create new products to help increase competitiveness in the world market.

Pepper



VINACAS forecasts that the growth of the cashew industry will be significantly affected because global demand for cashew consumption continues to be gloomy. Cashew exports to the EU market continue to face many difficulties and challenges.

Cashew nuts





Any comments, please send to:

INFORMATION CENTER FOR AGRICULTURE AND RURAL DEVELOPMENT
INSTITUTE OF POLICY AND STRATEGY FOR AGRICULTURE AND RURAL DEVELOPMENT

Address: *16 Thuy Khue Street, Thuy Khue Wd., Tay Ho Dist., Hanoi*

Email: thongtinhitruong@ipsard.gov.vn; info@agro.gov.vn

Website: <http://agro.gov.vn/>

