

Volume 4/2025



ISPAE

MONTHLY REPORT ON AGRI-PRODUCT EXPORT

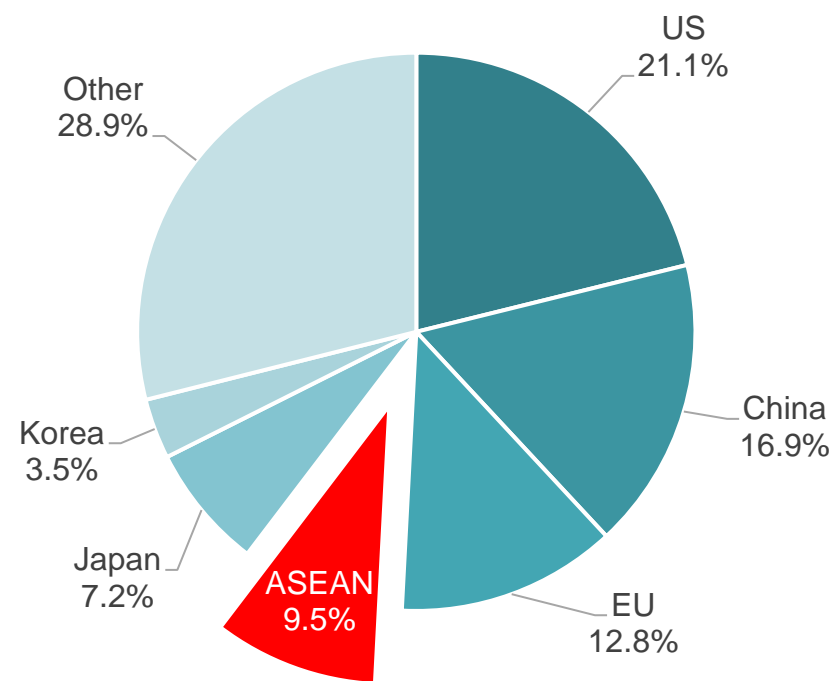
FROM VIETNAM TO **ASEAN**

Prepared by: **AGREiNFOS**



THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN MARCH 2025

Export proportion of AFF product to the ASEAN, Mar-2025



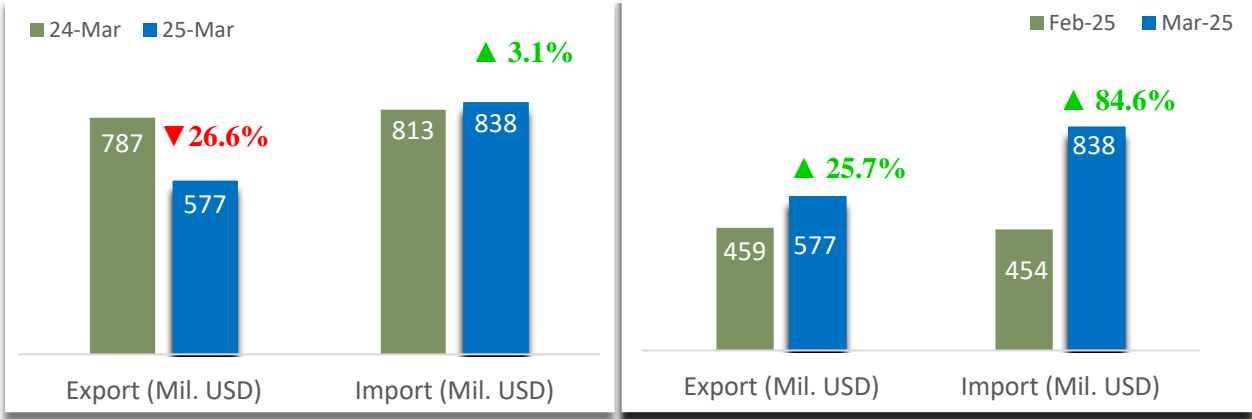
Changes in export proportion of AFF product to the ASEAN
Mar-2025 compared to Feb-25 and Mar-24

	Export value (Mil. USD)	Compared to Feb-25	Compared to Mar-24
US	1,281	▲ 2.8%	▲ 0.9%
China	1,025	▲ 0.1%	▲ 0.3%
EU	772	▼ 1.6%	▲ 2.2%
ASEAN	577	▼ 0.5%	▼ 5.6%
Japan	438	▼ 0.6%	▲ 0.4%
Korea	211	▼ 0.1%	▼ 0.3%
Total export	6,056		

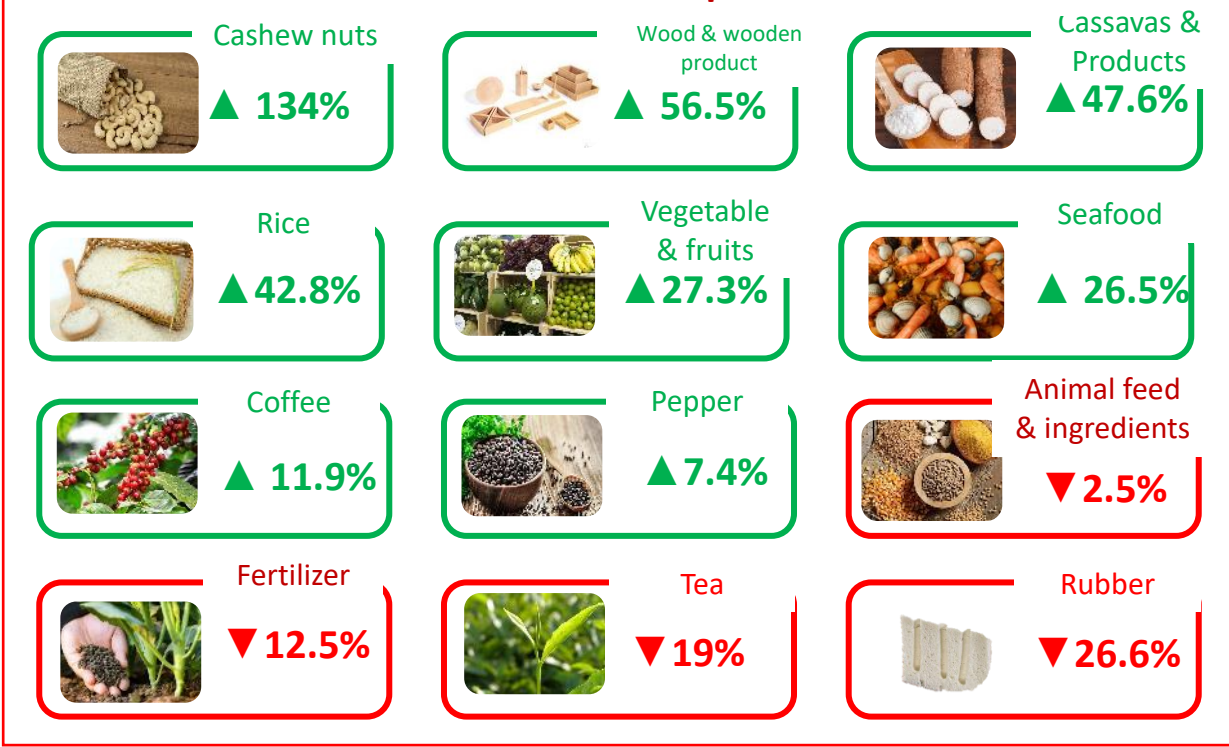
Source: Calculated from data of the General Department of Customs

THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO ASEAN IN MARCH 2025

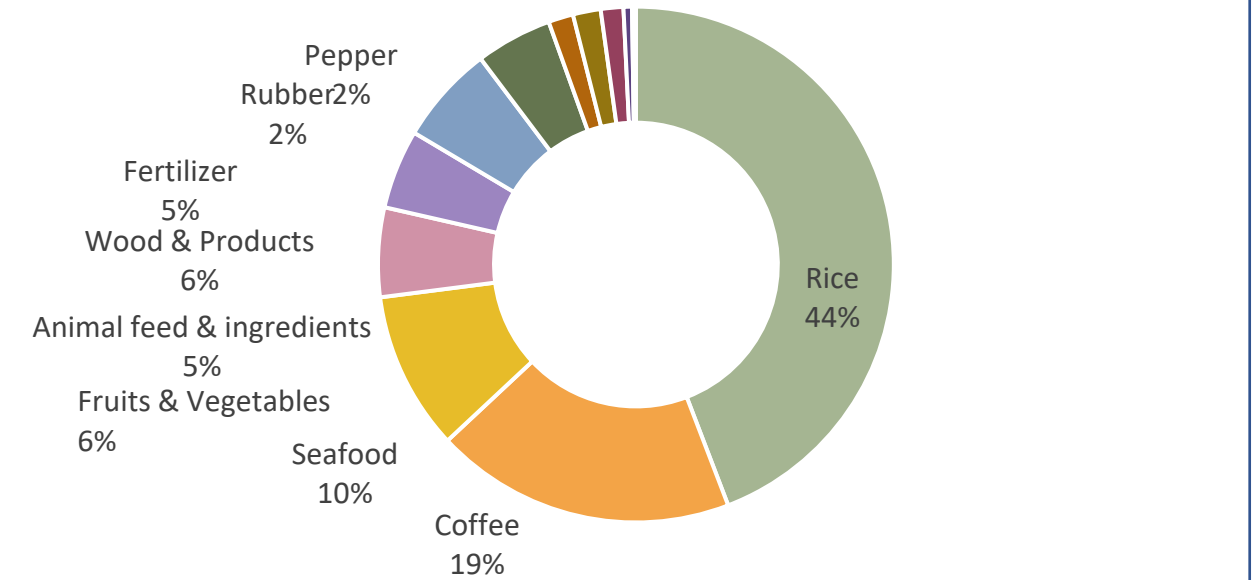
AFF product import-export turnover between
Vietnam and ASEAN, March 2025



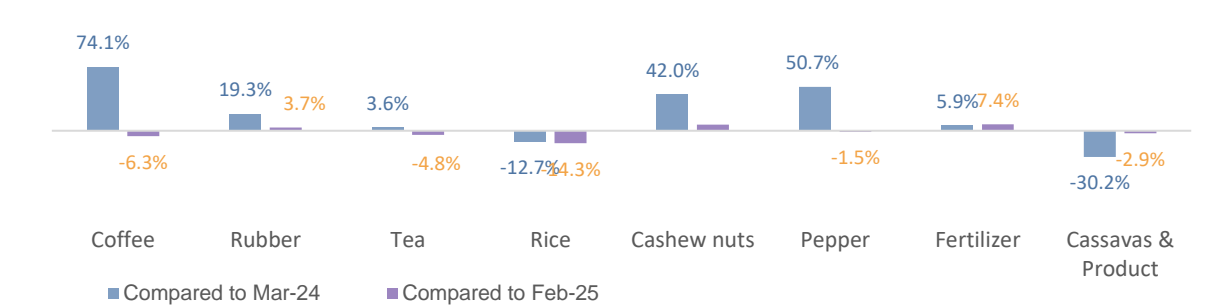
Changes in key AFF product export value to
ASEAN in Mar 2025 compared to Feb 2025



Key AFF product export value to ASEAN, March 2025



Changes in average export value of key AFF products
to ASEAN in Mar-25 compared to Mar-24 and compared to Feb-25



Source: Calculated from data of the General Department of Customs

Unit: Mil. USD

SPOTLIGHT



China ready to upgrade free trade protocol with ASEAN

China's ready to upgrade the Free Trade Protocol with ASEAN

On 16 April in Putrajaya, during a meeting with Malaysian Prime Minister - Mr Anwar Ibrahim, Chinese President -Mr Xi Jinping stated that China is ready to sign the upgraded version of the ACFTA Protocol to foster deeper regional trade and cooperation, particularly in the context of significant volatility in global supply chains.



China and ASEAN committed to prevent any disruption of supply chains and continue the cooperation on the basis of openness, inclusiveness, and solidarity. In the first two months of 2025, bilateral trade between China and ASEAN reached CNY 1.030 trillion (approximately USD 140 billion), a 4% increase compared with the same period of the previous year, accounting for 15.8% of China's total import-export value and thereby reaffirming ASEAN's position as the China's largest trading partner.

Source: aseanvietnam.vn



ASEAN pledges to support multilateral trading system

ASEAN support multilateral trading system

The 12th ASEAN Finance Ministers and Central Bank Governors' Meeting (AFMGM-12), held in Kuala Lumpur from 7 to 10 April 2025, concluded with a joint announcement to reaffirming ASEAN's strong commitment to a rules-based, multilateral, and equitable trading system. ASEAN also emphasized that there is no retaliatory measures taken to the United States' new tariff policies. ASEAN Member States welcomed the US decision on suspending the imposition of tariffs for 90 days. It is an opportunity for dialogue to achieve a balanced and sustainable solution. The meeting also agreed to establish the "ASEAN Geo-Economic Task Force", aiming to coordinate policy responses to emerging economies, and launched the ASEAN Infrastructure Fund Action Plan for the 2025–2028 period..

Source: aseanvietnam.vn





RICE

Export volume and value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025

VALUE
255.7 *Mil. USD*

↗ Increase **42.6%** compared to Feb-25

↘ Decrease **50.1%** compared to Mar-24

↘ **72.6 Mil. USD** less than the monthly average rate in 2024.

◇ Accumulated 3 month of 2025 reaches **579.8 Mil USD**, and the rate is **14.7%** of total in 2024.

VOLUME
531.6 *thousand tons*

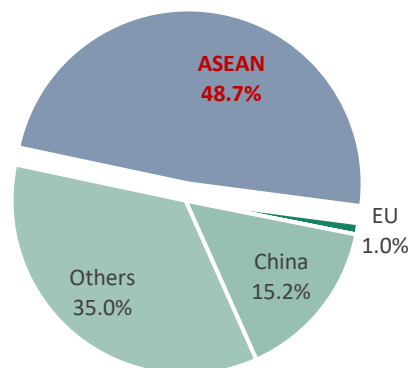
↗ Increase **48.1%** compared to Feb-25

↘ Decrease **36.0%** compared to Mar-24

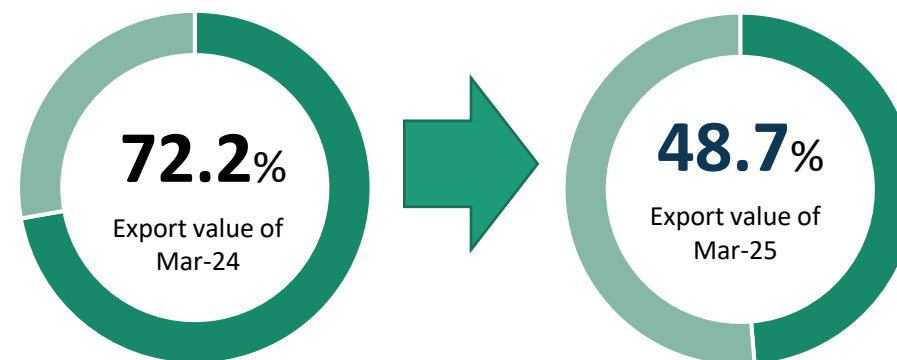
↘ **4.5 thousand tons** less than the monthly average rate in 2024.

◇ Accumulated 3 month of 2025 reaches **1.14** thousand ton, and the rate is **17.8%** of total in 2024.

Percentage of export value to ASEAN, Mar-2025



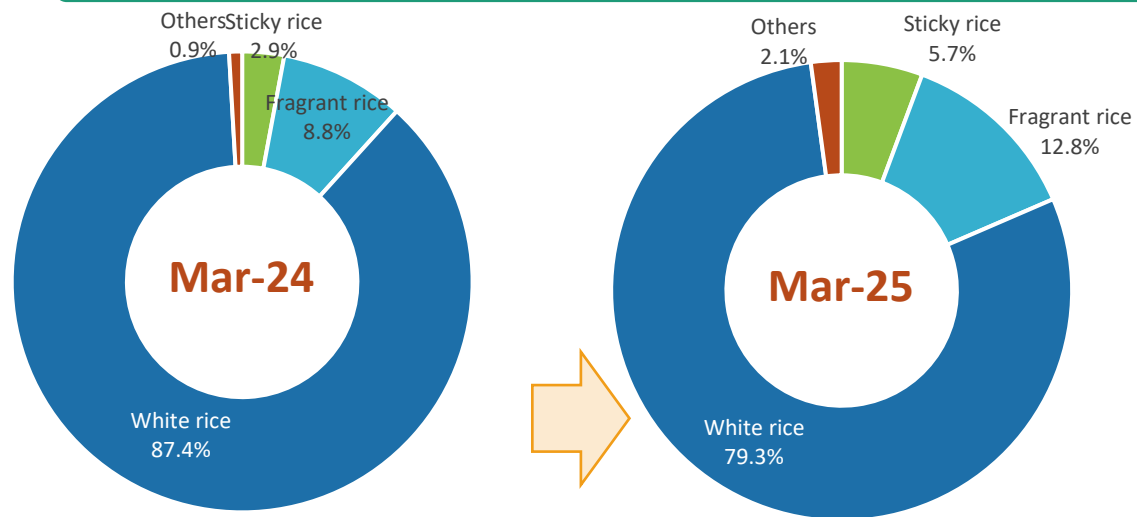
Changes in the percentage of export value to ASEAN, Mar-2025





RICE

Structure of exports by products to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



White rice

Value: **202.9** Mil. USD

Increase **40%** compared to Feb-25

Decrease **55%** compared to Mar-24



Fragrant rice

Value: **32.8** Mil. USD

Increase **30%** compared to Feb-25

Decrease **27%** compared to Mar-24



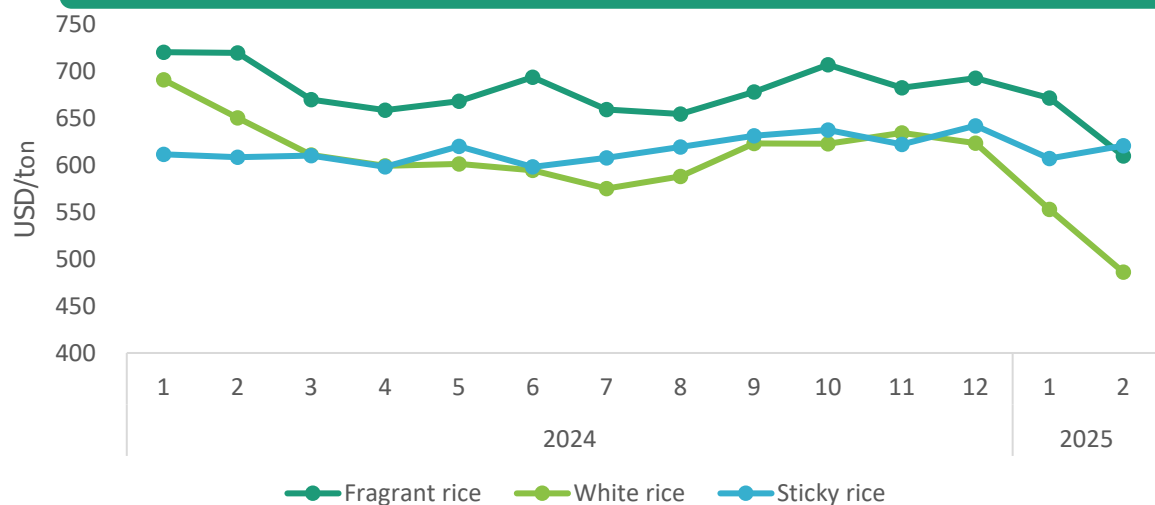
Sticky rice

Value: **14.5** Mil. USD

Increase **113%** compared to Feb-25

Decrease **4%** compared to Mar-24

Average export price to ASEAN, Mar-2025



Sticky rice

The average export price in Mar-25 is **607** USD/ton; **Decrease 2%** compared to the previous month; and **Increase 1%** compared to the same month in 2024.

Fragrant rice

The average export price in Mar-25 is **570** USD/ton; **Decrease 7%** compared to the previous month; and **Decrease 15%** compared to the same month in 2024.

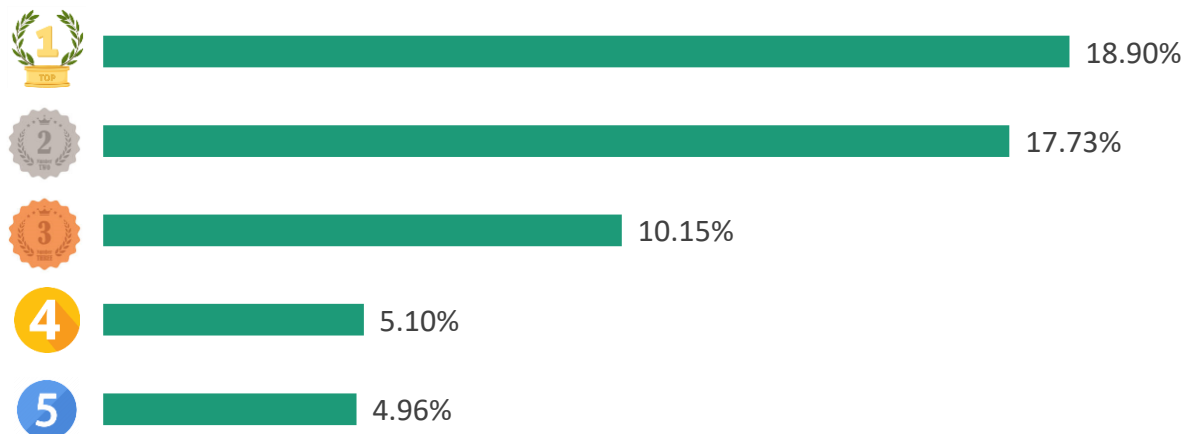
White rice

The average export price in Mar-25 is **467** USD/ton; **Decrease 4%** compared to the previous month; and **Decrease 24%** compared to the same month in 2024.

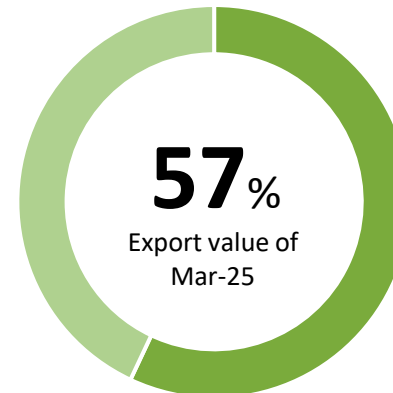


RICE

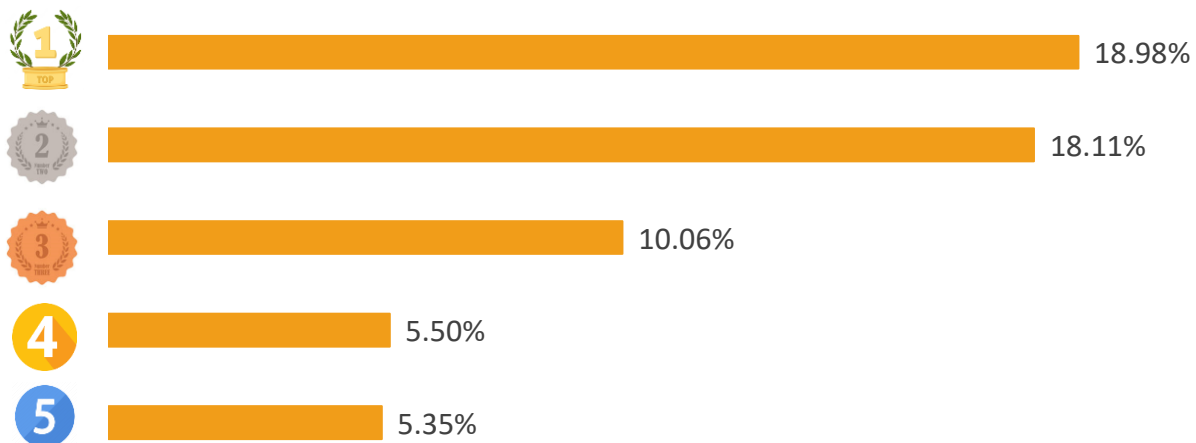
Top 5 export enterprises by value to ASEAN, Mar-2025



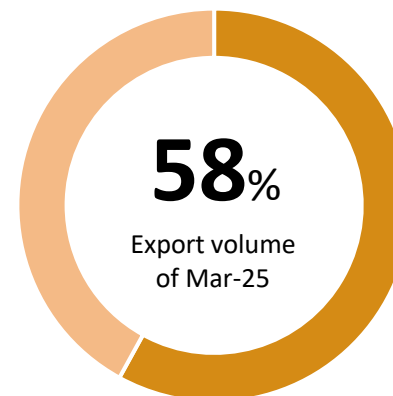
Value ratio of Top 5 export enterprise to ASEAN, Mar-2025



Top 5 export enterprises by volume to ASEAN, Mar-2025



Volume ratio of Top 5 export enterprise to ASEAN, Mar-2025





RICE

SPOTLIGHT

01



Thailand's farmers are facing with substantial challenges arising from depressed rice prices and elevated production costs, particularly after India's resumption of rice exports. In a recent announcement, the United States will impose a 36 % tariff on imported rice from Thailand. Although this tariff has been suspended for the time being, this new tariff leads to raise import costs and reduce demand for Thai rice in the U.S. market—one of Thailand's most important export destinations, with an annual import value of approximately USD 735 million.

Currently, domestic rice prices in Thailand is falling so that many farmers are worry about their ability to maintain their livelihoods under high production costs and relatively low yields. Thai producers also face strong competition from other rice exporters such as Vietnam, where production costs are lower and multiple annual harvest seasons. Vietnamese rice price is about USD 580 per ton, substantially lower than Thailand's prevailing price of USD 1,000 per ton. In response, Thai farmers are expected that their government will find solutions to protect the national rice-export by negotiating.

Source: msn.com

02

On 22 April 2025, Indonesia's Minister of Ministry of Agriculture, Mr Amran Sulaiman reported that Malaysia had expressed interest in importing rice from Indonesia in response to rising domestic prices. He addressed that Indonesia's priority is to safeguard national food security by maintaining and increasing its rice reserves—from 3.36 million ton to approximately 4 million ton by May 2025. At the same time, Malaysia's rice consumption remains high but domestic production meets only about 40–50 percent of its demand. Despite this production shortfall, Malaysia has achieved notable technological advances in rice cultivation. To date, Malaysia has not imported rice but importing other agricultural commodities from Indonesia such as coconuts, vegetables, and fish.

Source: en.tempo.co





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Mar-25



Export results to the ASEAN, Mar-25

VALUE

34.4

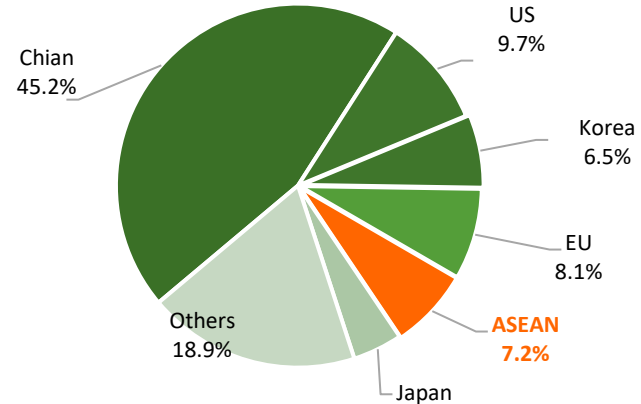
Mil. USD

Increase **27.7%** compared to Feb-25

Increase **5.5%** compared to Mar-24
2.0 Mil. USD less than the monthly average rate in 2024.

Accumulated 3 month of 2025 reaches **97.1 Mil. USD**, and the rate is **22.2%** of total in 2024.

Percentage of export value to the ASEAN, Mar-25



Changes in percentage of export value to the ASEAN, Mar-25

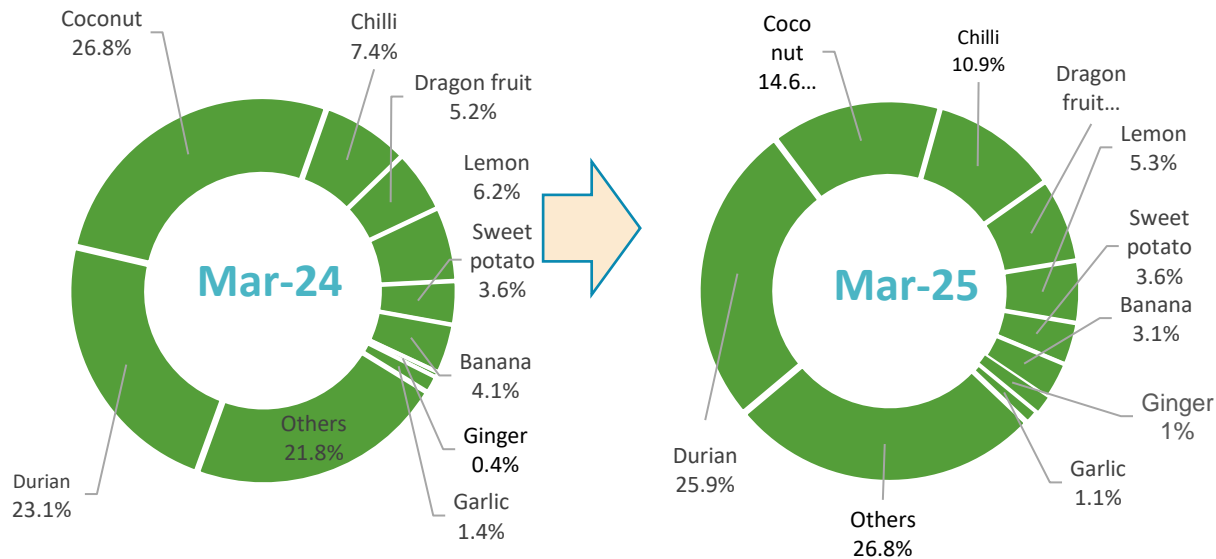


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Mar-25



Export results to the ASEAN, Mar-25



Durian

Value: **8.9** Mil. USD
 Increase **40.4%** compared to Feb-25
 Increase **18.2%** compared to Mar-24



Coconut

Value: **5.0** Mil. USD
 Increase **22.5%** compared to Feb-25
 Decrease **42.6%** compared to Mar-24



Chilli

Value: **3.8** Mil. USD
 Increase **12.9%** compared to Feb-25
 Increase **56.8%** compared to Mar-24



Dragon Fruit

Value: **1.5** Mil. USD
 Increase **82.8%** compared to Feb-25
 Increase **45.3%** so compared to Mar-24



Lemon

Value: **1.8** Mil. USD
 Increase **131.5%** compared to Feb-25
 Decrease **10.6%** compared to Mar-24



Sweet potato

Value: **1.2** Mil. USD
 Increase **27.5%** compared to Feb-25
 Increase **4.2%** compared to Mar-24



Banana

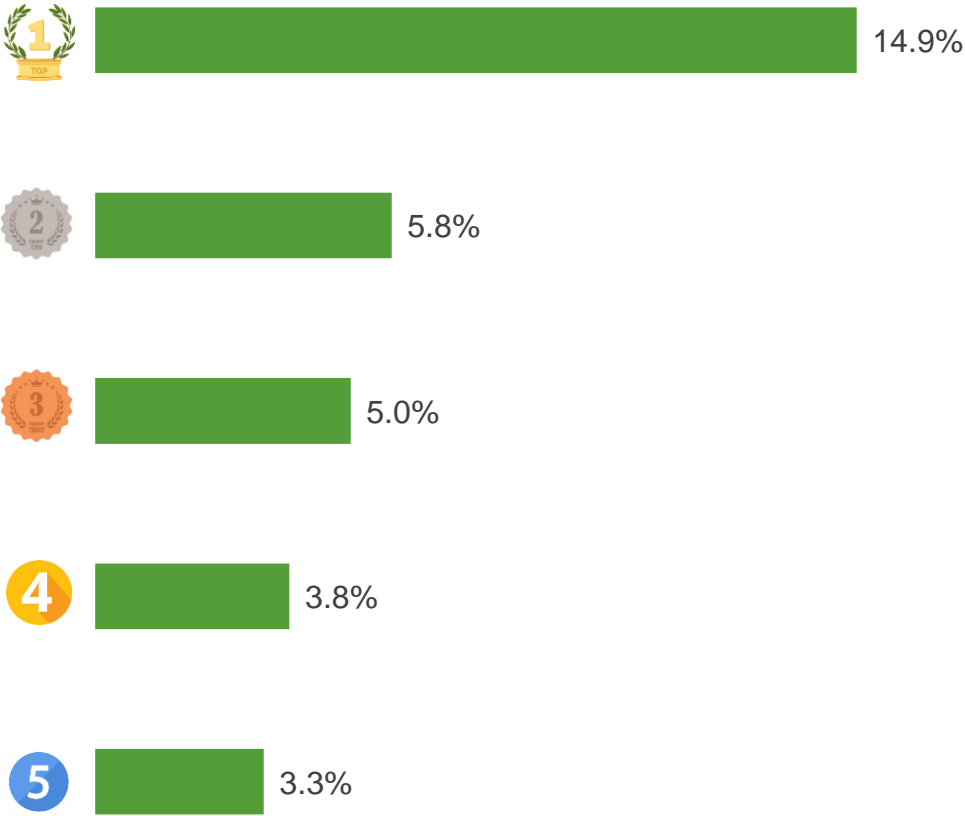
Value: **1.1** Mil. USD
 Decrease **10.8%** compared to Feb-25
 Decrease **19.4%** compared to Mar-24

Source: Calculated from data of the General Department of Customs

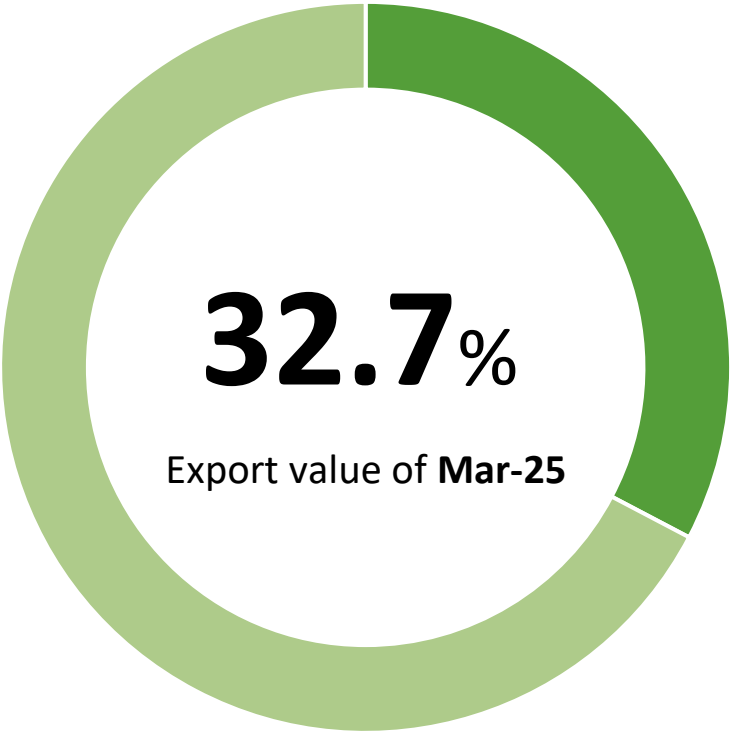


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Mar-2025



Value ratio of TOP 5 export enterprises to the ASEAN, Mar-2025



Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Mar-2025



Import results to the ASEAN, Mar-2025

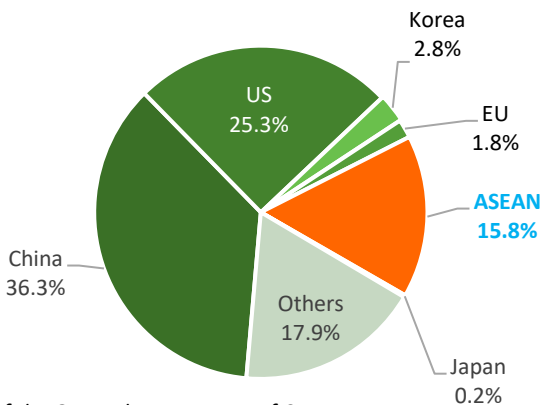


Increase **26.9%** compared to Feb-25

Increase **28.9%** compared to Mar-24
5.7 Mil. USD more than the monthly average rate in 2024.

Accumulated 3 month of 2025 reaches **79 Mil. USD**, and the rate is **25.5%** of total in 2024.

Percentage of import value to the ASEAN, Mar-2025



Changes in percentage of import value to the ASEAN, Mar-2025

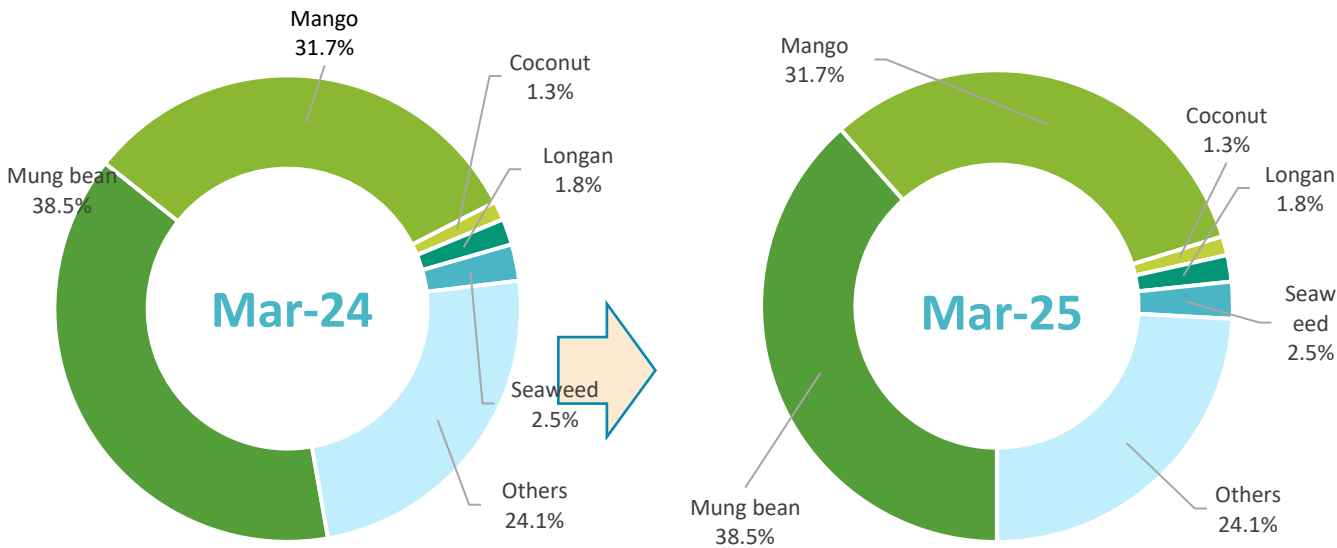


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Mar-2025



Coconut

Value: **2.4** Mil. USD
Increase **37.7** % compared to Feb-25
Increase **663.9** % compared to Mar-24



Longan

Value: **1.2** Mil. USD
Increase **5.0** % compared to Feb-25
Increase **166.3** % compared to Mar-24

Import results from the ASEAN, Mar-2025



Mung bean

Value: **10.0** Mil. USD
Increase **49.6** % compared to Feb-25
Increase **6.9** % compared to Mar-24



Mango

Value: **6.3** Mil. USD
Increase **36.7** % compared to Feb-25
Decrease **18.3** % compared to Mar-24



Seaweed

Value: **0.25** Mil. USD
Decrease **27.4** % compared to Feb-25
Decrease **59.3** % compared to Mar-24



Indonesia exports first 200kg of fresh coconuts to China

On the afternoon of 12 April 2025, a consignment of fresh coconuts from Indonesia arrived at Fuzhou Changle International Airport, Fuzhou, People's Republic of China. Upon completion of customs quarantine and inspection procedures, the shipment was transported to processing enterprises in Fuzhou. This shipment represents the first importation of fresh coconuts from Indonesia since the two countries signed the Plant Quarantine Protocol in November 2024..

Source: Guojiguoshu.com

Laos expands durian area, actively plans to export to Chinese market

Laos has granted licenses to three domestic companies to cultivate durian of 273 hectares, each company allocated approximately 100 hectares of land in 30-year term. The Laos' Ministry of Agriculture is preparing the necessary documentation to apply for a durian export permit to China, with shipments expected to commence by late 2025. China proposed to establish entities such as the Lao Durian Association and the Lao Durian Research Center to oversee the entire value chain—from planting material and cultivation techniques to quality control and logistics. The Government of Laos endorses these proposals, viewing them as a critical step to promote durian exports to China.

Source: Guojiguoshu.com



FRUITS AND VEGETABLES



Two suspended labs have been restored, Thailand has a total of 10 labs testing for O-yellow substance

On 15 April 2025, the Ministry of Agriculture and Cooperatives of Thailand announced that it proposed the addition of five laboratories for the analysis of O-yellow compound and cadmium residues, and requested the reactivation of two suspended laboratories previously. Following bilateral negotiations, China approved seven of the laboratories proposed by Thailand, with the decision taking effect on 14 April 2025. At present, Thailand has ten approved laboratories for O-yellow compound residue testing, sufficient to meet the analytical demand for the upcoming season—especially for durian exports.

Source: Guojiguoshu.com

Thailand's durian output expected to increase by 30.7% in 2025

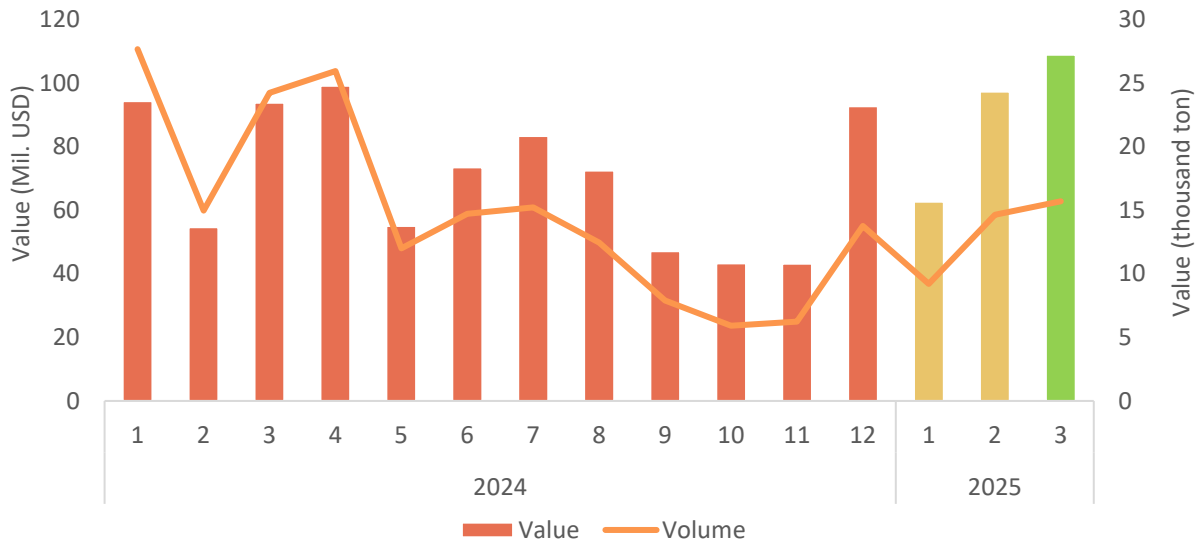
Thailand's durian output in 2025 is projected at 1.68 million tonnes, a 30.72 % increase over 2024. The main reason is due to durian trees planted by farmers in 2020 in the first full-yield harvest in main growing provinces such as Chanthaburi, Rayong, and Trat. Moreover, favourable weather conditions have further promoted flowering and fruit set.

Source: Vietnambiz.vn

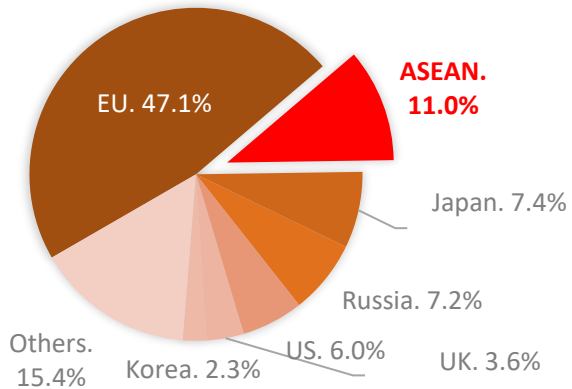


COFFEE

Export volume and value to ASEAN, Feb-2025



Percentage of export value to ASEAN, Feb-2025



Export results to ASEAN, Feb-2025

VALUE

108.9 Mil. USD

↗ Increase **11.9%** compared to Feb-25

↗ Increase **16.1%** compared to Mar-24

↗ **37.9** Mil. USD more than the monthly average rate in 2024..

❖ Accumulated 3 month of 2025 reaches **268.8** Mil.USD, and the rate is **31.5%** of total in 2024.

VOLUME

15.7 thousand tons

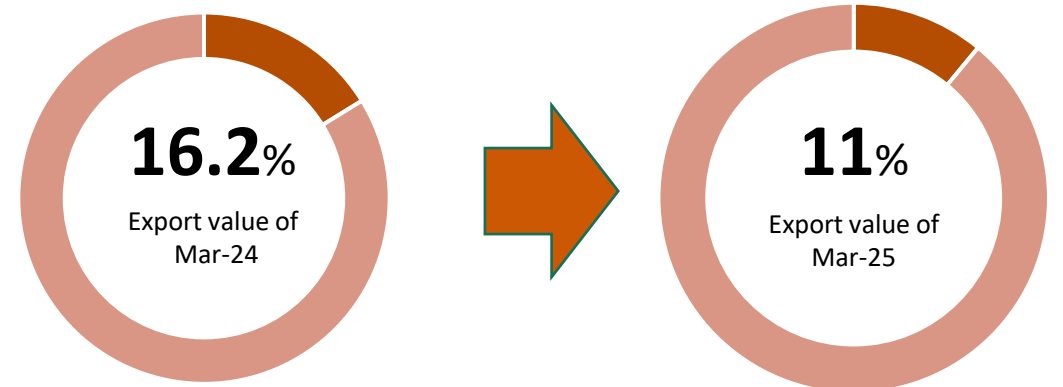
↗ Increase **7.3%** compared to Feb-25

↘ Decrease **32.5%** compared to Mar-24

↗ **0.6** thousand tons more than the monthly average rate in 2024..

Accumulated 3 month of 2025 reaches **39.5** thousand tons, and the rate is **21.9%** of total in 2024.

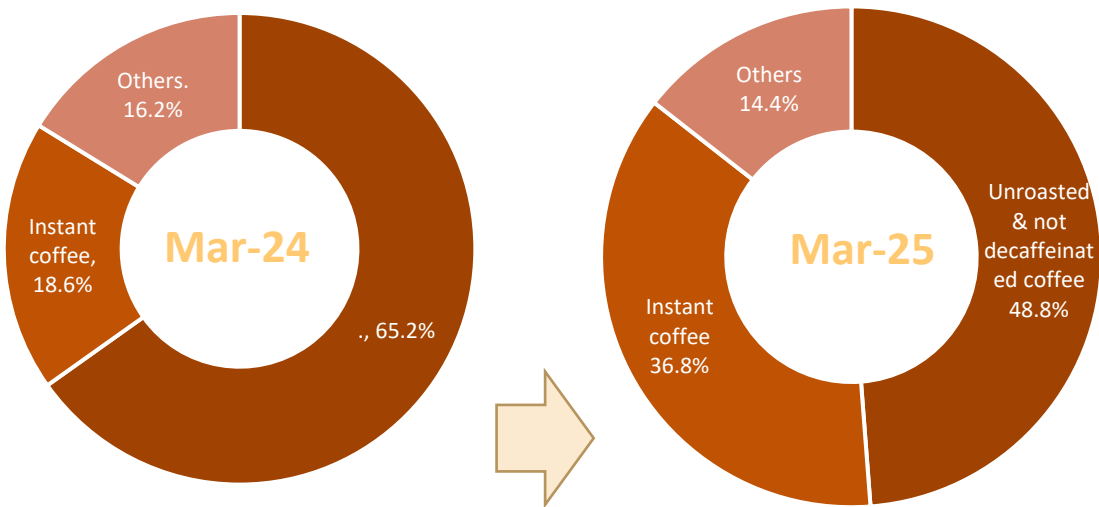
Changes in percentage of export value to ASEAN, Feb-2025



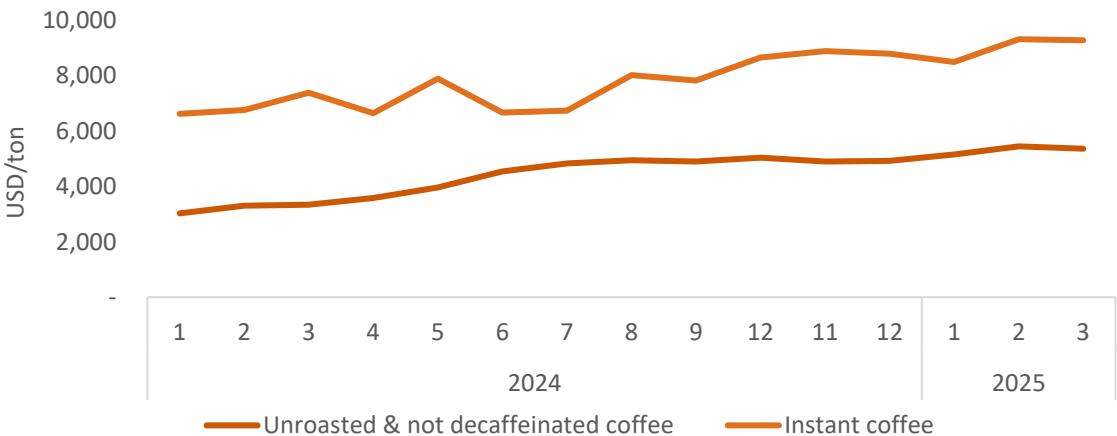


COFFEE

Structure of exports by products to ASEAN, Mar-2025



Average export price to ASEAN, Mar-2025



Source: Calculated from data of the General Department of Customs

Export results to ASEAN, Mar-2025



Unroasted & not decaffeinated coffee

Value: **53.1** Mil. USD
Increase **11%** compared to Feb-25
Decrease **8.4%** compared to Mar-24



Instant coffee

Value: **40** Mil. USD
Increase **11.8%** so compared to Feb-25
Increase **142%** compared to Mar-24



Others

Value: **14.6** Mil. USD
Increase **14.3%** compared to Feb-25
Increase **11%** compared to Mar-24

Instant coffee

The average export price in Mar-25 is **9.270** USD/ton; decrease **0.3%** compared to the previous month; and increase **25.8%** compared to the same month in 2024.

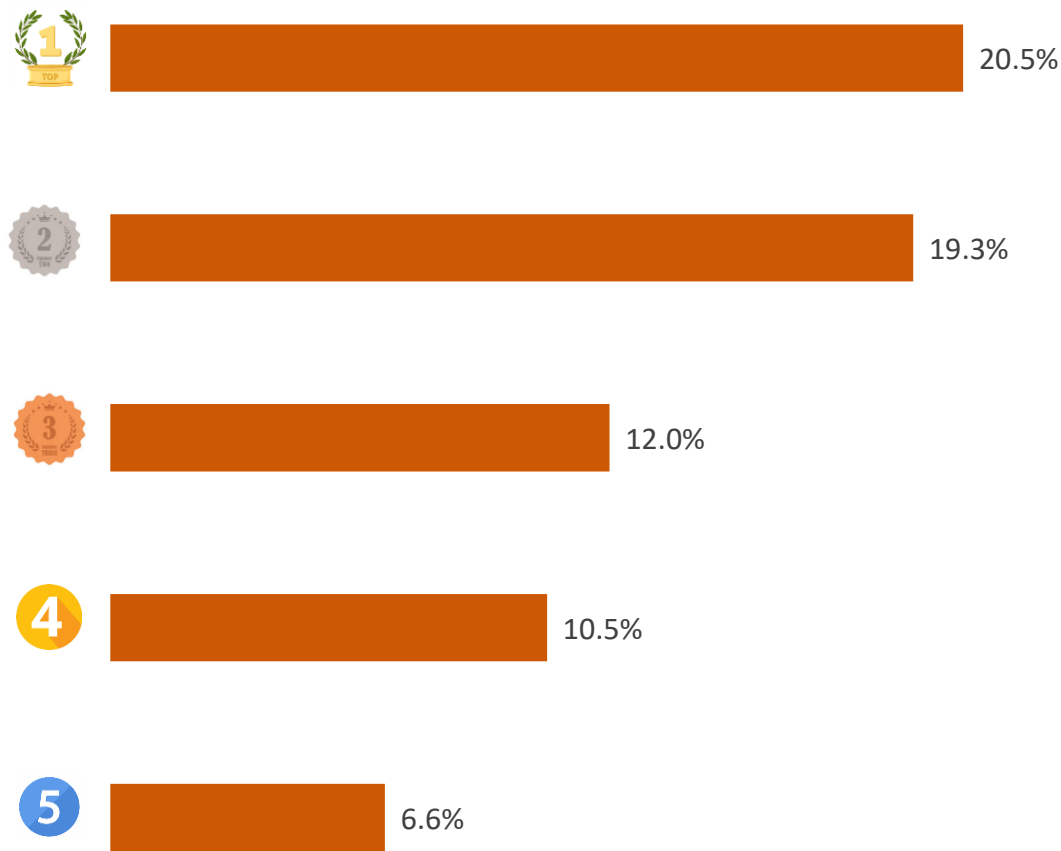
Unroasted & not decaffeinated coffee

The average export price in Mar-25 is **5.578** USD/ton; decrease **1.7%** compared to the previous month; and increase **67.2%** compared to the same month in 2024.

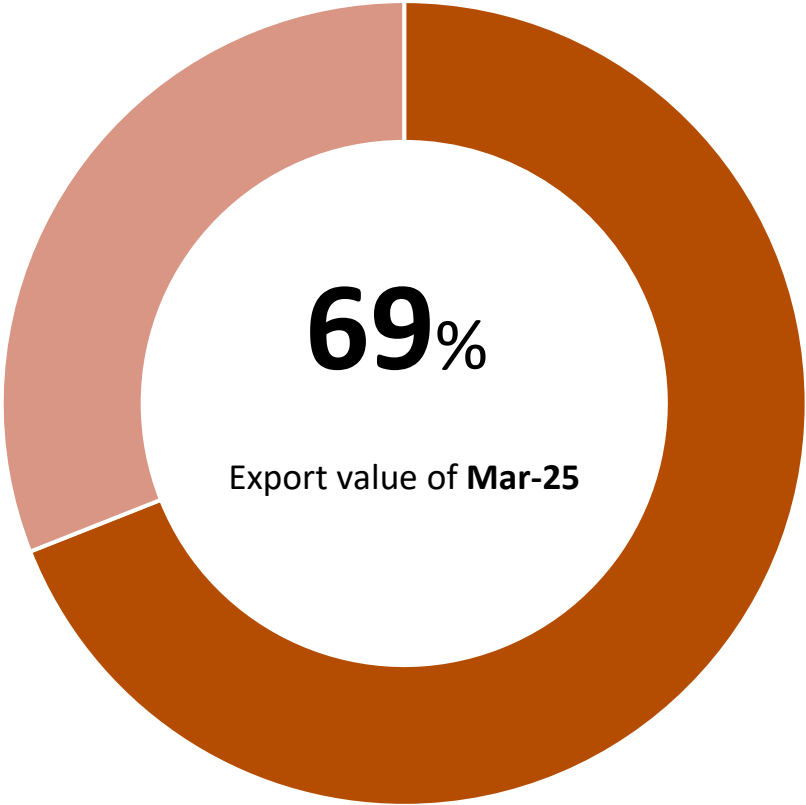


COFFEE

TOP 5 export enterprises by value to **ASEAN, Feb-2025**



Value ratio of TOP 5 export enterprises to **ASEAN, Feb-2025**



Source: Calculated from data of the General Department of Customs



Thai coffee import situation in the first 2 months of 2025

According to the International Trade Centre (ITC), in the first two months of 2025 Thailand's coffee imports was about 5.6 thousand tonnes, valued at USD 27.1 million—representing a 20.5 % decrease in volume but a 12.6 % increase in value compared with the same period of 2024.

During this period, the average import price of coffee into Thailand reached USD 4,831 per ton, up 41.7 % year-on-year. Notably, the average import price of Vietnamese coffee rose most sharply, increasing by 82.2 % to USD 5,475 per ton.

Source: Import and Export Department - Ministry of Industry and Trade





Exporting coffee from Sumatra Island - Indonesia.

In March 2025, Robusta coffee exports from Sumatra-the leading coffee-producing region of Indonesia-were about 379,513 bags, a 476.84 % increase over the same month of the previous year (313,721 bags). This sharp rise was primarily attributed to favorable weather conditions and elevated Robusta futures prices, which together boosted the export value compared with the previous year.

In 2024–2025 coffee season (April 2024 to March 2025), Sumatra exported a total of 3,715,889 bags of Robusta coffee, representing an 80.01 % increase year-on-year from 1,651,849 bags in the corresponding period.

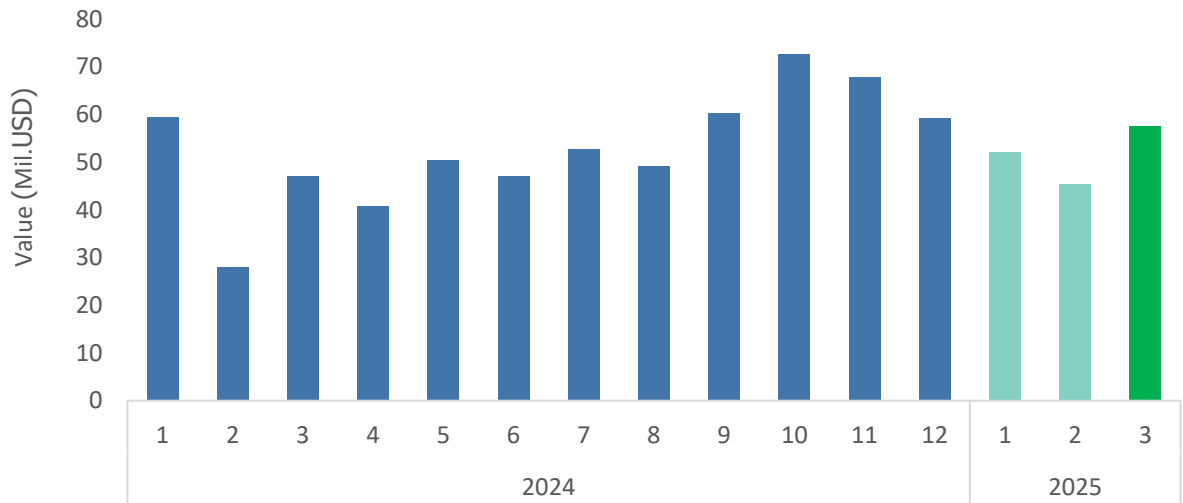
Source: I. & M. Smith (Pty) Ltd.



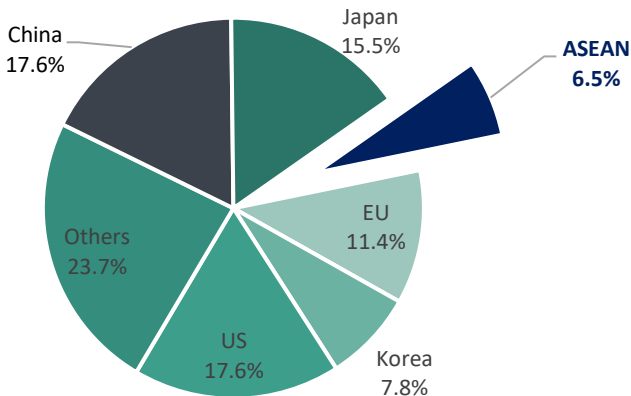


FISHERIES

Export value to ASEAN, Mar-2025



Percentage of export value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025

VALUE



57.5 Mil. USD

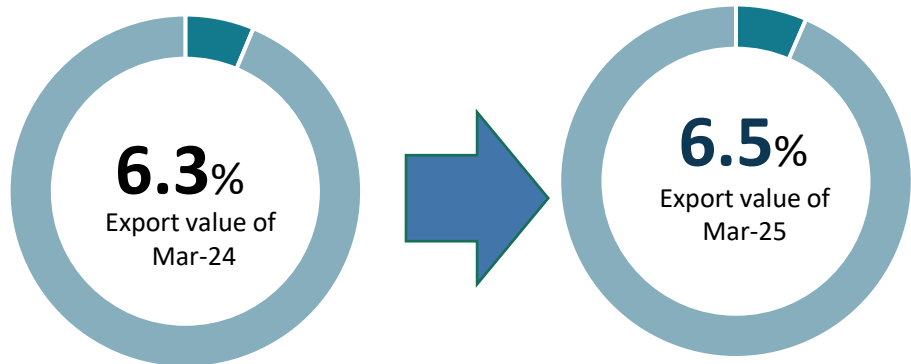
↗ Increase **26.5** % compared to Feb-25

↗ Increase **22.1** % compared to Mar-24

▲ **4.6 Mil. USD** more than the monthly average rate in 2024.

◇ Accumulated 3 month of 2025 reaches **155.1 Mil. USD**, and the rate is **24.4%** of total in 2024.

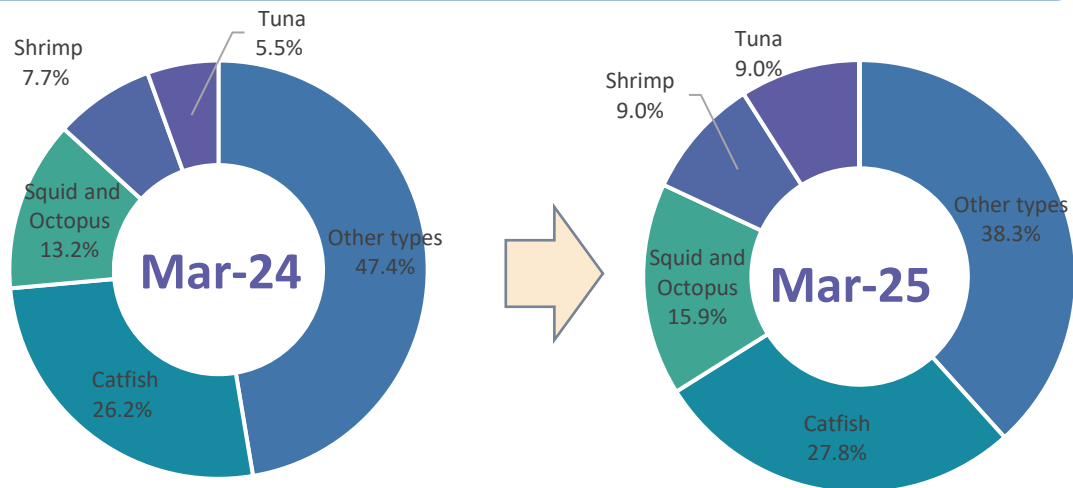
Change in percentage of export to ASEAN, Mar-2025



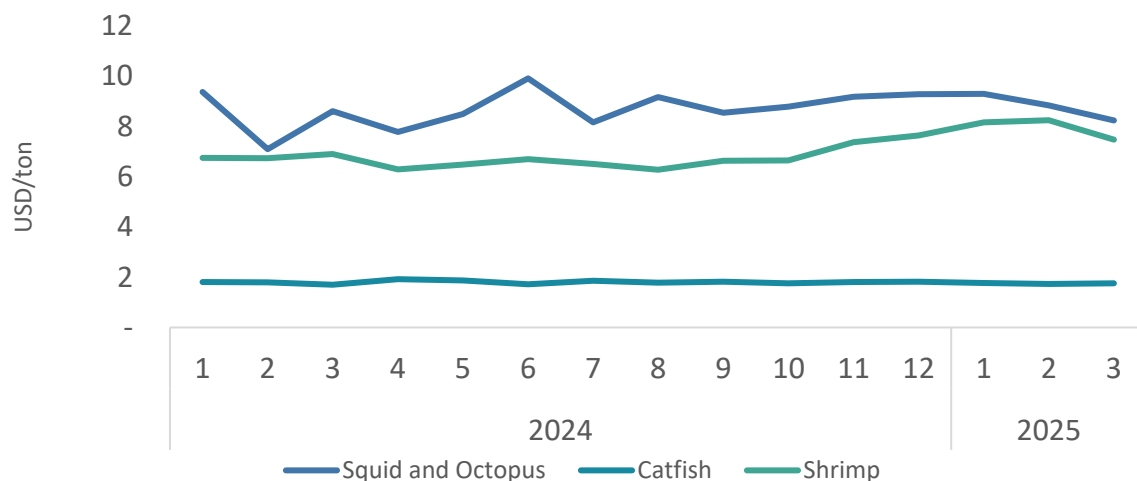


FISHERIES

Structure of exports by products to ASEAN, Mar-2025



Average export price to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Catfish

Value: **16.0** Mil. USD

Increase **0.4%** compared to Feb-25

Increase **29.3%** compared to Mar-24



Squid & Octopus

Value: **9.1** Mil. USD

Increase **41.9%** compared to Feb-25

Increase **47.1%** compared to Mar-24



Shrimp

Value: **5.2** Mil. USD

Increase **11.6%** compared to Feb-25

Increase **42.7%** compared to Mar-24

Squid & Octopus

The average export price in Mar-25 is **8.2 USD/kg**; **Decrease 6.7%** compared to the previous month; and **Decrease 4.4%** compared to the same month in 2024.

Catfit

The average export price in Mar-25 is **1.8 USD/kg**; **Increase 1.0** compared to the previous month; and **Increase 1.2%** compared to the same month in 2024.

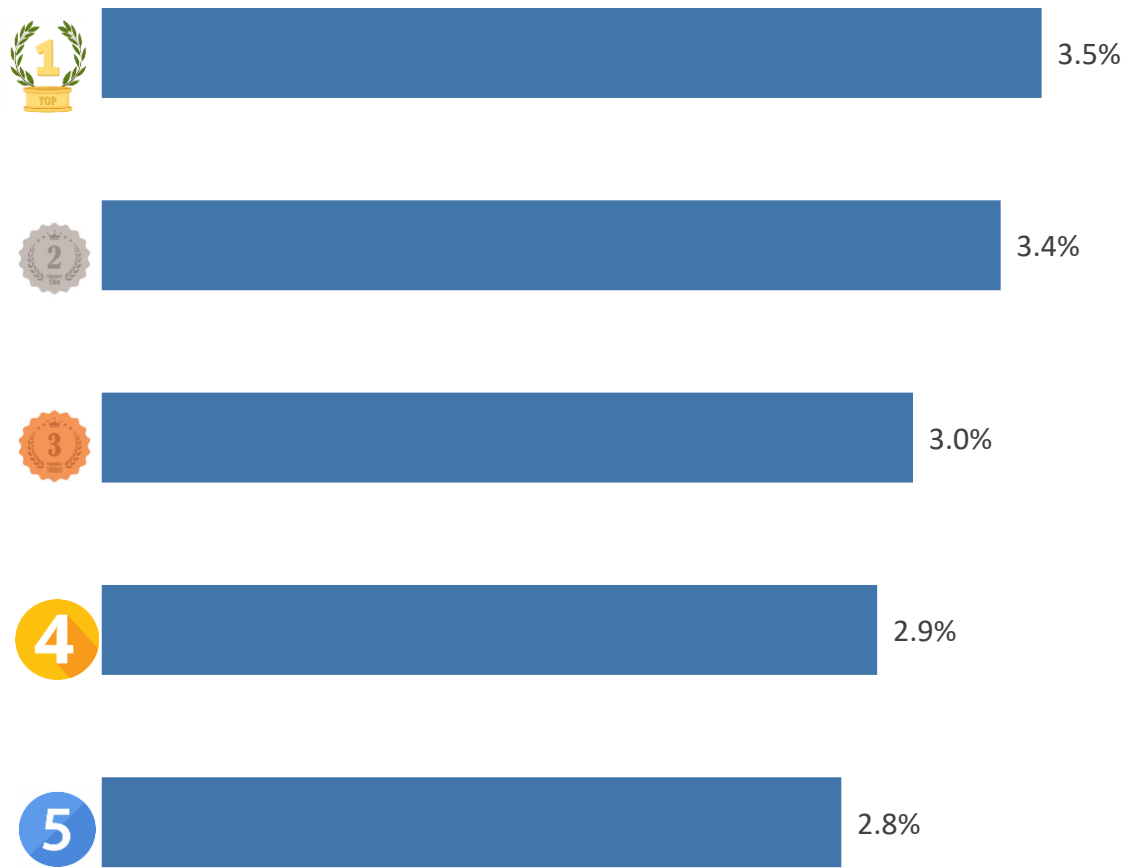
Shrimp

The average export price in Mar-25 is **7.5 USD/kg**; **Decrease 9.3%** compared to the previous month; and **Increase 8.3%** compared to the same month in 2024.

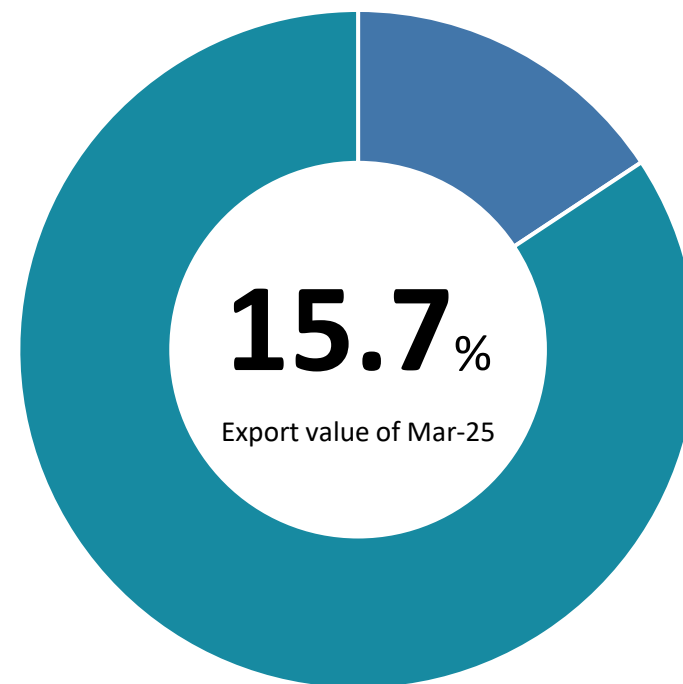


FISHERIES

TOP 5 export enterprises by value to ASEAN, Mar-2025



Value ratio of TOP 5 export enterprises to ASEAN, Mar-2025



01

Vietnam became the Singapore's fourth seafood supplier.

In the first quarter of 2025, Vietnam became the Singapore's fourth-largest seafood supplier—lowering Malaysia, Indonesia and Norway. Exports of Vietnamese seafood to Singapore reached SGD 28.7 million (approximately USD 21.8 million), up 19.3 percent year-on-year and accounting for 10.1 percent of Singapore's total seafood imports. Vietnam accounts for the largest market share in two key product segments: fish fillets and chilled/frozen fish meat.

Total seafood imports in Singapore is about SGD 283.6 million (approximately USD 215.5 million), a 1.1 percent increase compared with Q1 2024. The Four main products include fresh/chilled fish; frozen fish; fish fillets and chilled/frozen fish meat; and crustaceans.

To support Vietnamese exporters, the Vietnam Trade Office in Singapore worked with the Vietnam Association of Seafood Exporters and Producers (VASEP) to enhance market access, promote commercial linkages, and raise the profile of Vietnamese seafood in Singapore. Beyond the strong performance of fish fillets, other segments—particularly crustaceans and mollusks—Vietnamese exporters face strong competition from Malaysia, Indonesia, China, Japan and India. Vietnamese enterprises need to improve product quality, innovate packaging, and rigorously adhere to Singapore's regulatory requirements.



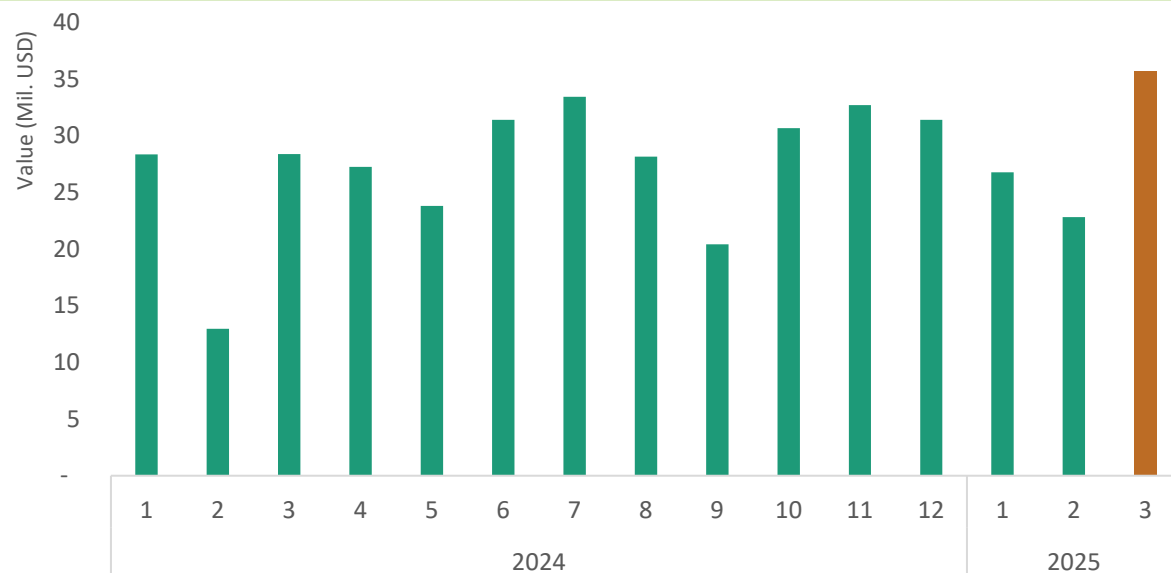
Source: Vietnam Fisheries Magazine (4/2025)





WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025

VALUE



36

Mil. USD

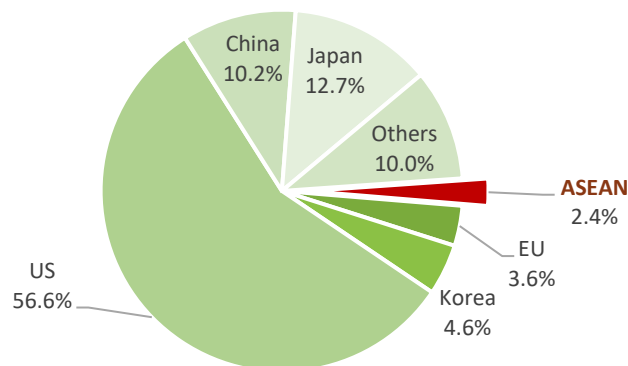
↗ Increase **56.5%** compared to Feb-25

↗ Increase **25.8%** compared to Mar-24

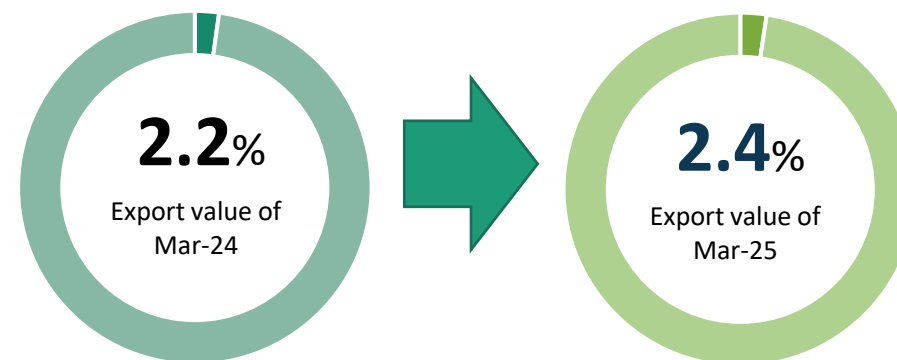
↘ **8.2** Mil. USD less than the monthly average rate in 2024.

Accumulated 3 month of 2025 reaches **85.2** Mil. USD, and the rate is **25.9%** of total in 2024.

Percentage of export value to ASEAN, Mar-2025



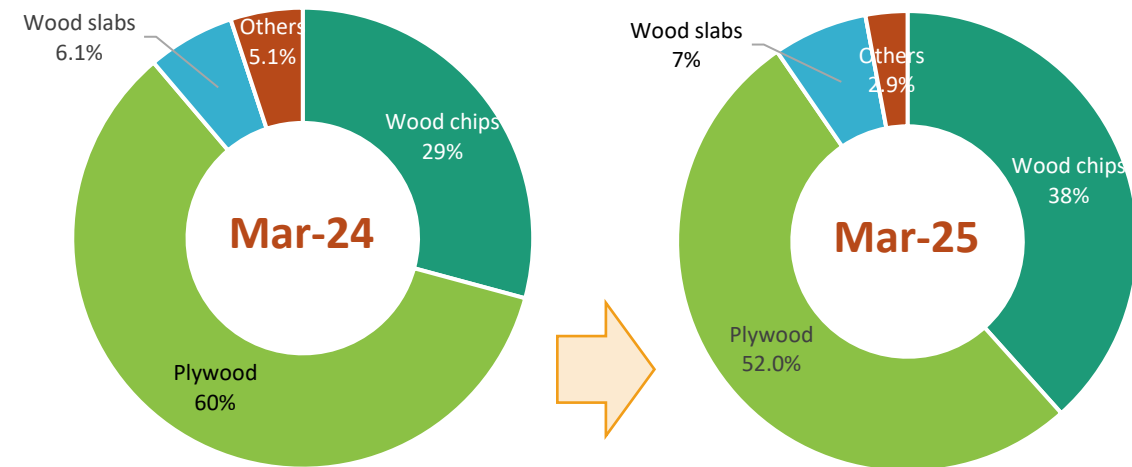
Changes in percentage of export value to ASEAN, Mar-2025





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Plywood

Value: **27.8** Mil. USD

Increase **56%** compared to Feb-25

Increase **18%** compared to Mar-24



Wood chips

Value: **20.5** Mil. USD

Decrease **5%** compared to Feb-25

Increase **77%** compared to Mar-24



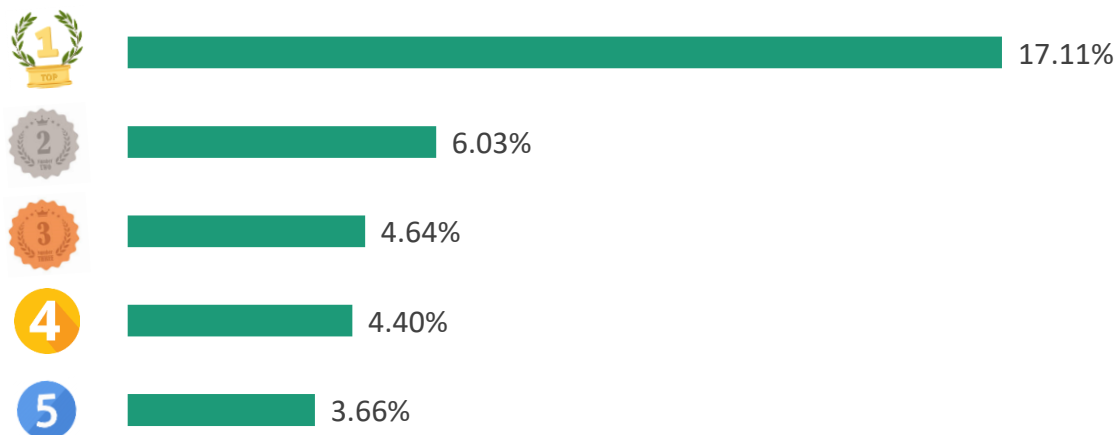
Wood slabs

Value: **2.9** Mil. USD

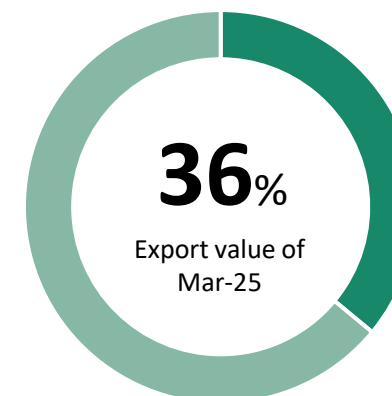
Increase **21%** compared to Feb-25

Increase **46%** compared to Mar-24

TOP 5 export enterprises by value to ASEAN, Mar-2025



Value ratio of TOP 5 export enterprises to ASEAN, Mar-2025



WOOD & WOODEN PRODUCTS

SPOTLIGHT



The State of Sarawak (Malaysia) is shifting from traditional timber extraction toward forest conservation and the development of forest-based revenue mechanisms—such as carbon credit trading and payments for ecosystem services. According to Mr. Hamden Mohammad, Director of the Sarawak Forestry Department, this initiative is necessary to modernize the forestry sector sustainably, apply advanced technologies, and align with the Sarawak Development Strategy to 2030.

Additionally, the Sarawak Forestry Department in collaboration with the Sarawak Timber Association, conducted a three-day training workshop in Sibu to ensure precision in timber commerce, proper resource-tax collection, and adherence to the Forests Ordinance 2015. Thirty-four participants are wood-measurement officers, log-yard supervisors, and other relevant stakeholders. The programme covered timber measurement and grading techniques, standardized record-keeping, resource-tax submission procedures, and included hands-on field exercises.

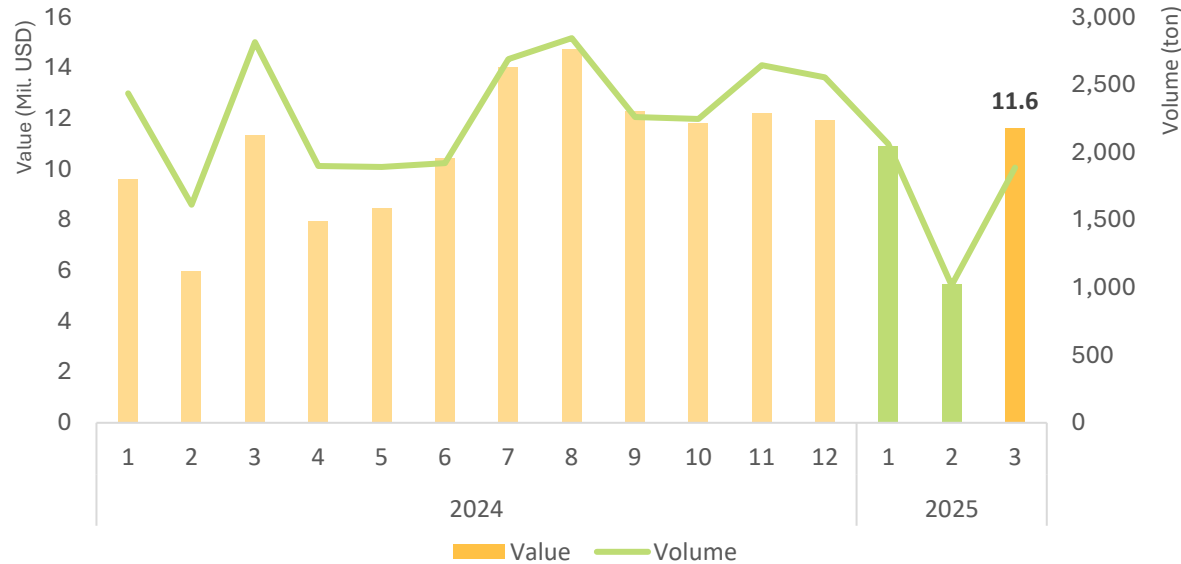
According to Indonesian Forestry Business Association (APHI), Indonesia's wood-product exports in the first quarter of 2025 increased by 8 percent year-on-year. The main product categories were paper products (USD 1.05 billion), pulp (USD 890.9 million), wood panels (USD 567 million), and furniture (USD 423.5 million). China remained the primary destination, with exports valued at USD 830.4 million (up 9 percent), followed by the United States (up 20 percent). Exports to the European Union and the United Kingdom reached USD 336.12 million (up 18 percent). In contrast, exports to Japan fell by 24 percent, and shipments to South Korea declined owing to weak demand.





CASHEW NUTS

Export value and volume to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025

VALUE

11.6 Mil. USD

↗ Increase **112%** compared to Feb-25

↗ Increase **2.4%** compared to Mar-24

↑ **0.72** Mil. USD more than the monthly average rate in 2024.

❖ Accumulated 3 month of 2025 reaches **28** Mil.USD, and the rate is **21%** of total in 2024

VOLUME

1.9 thousand tons

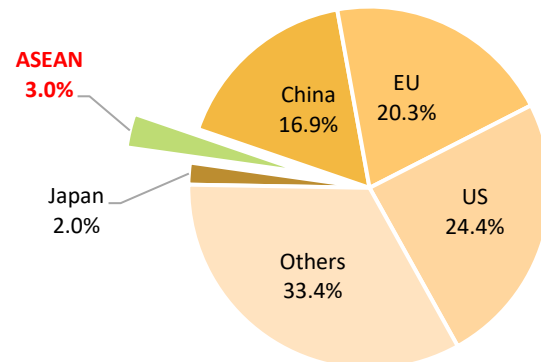
↗ Increase **85.5%** compared to Feb-25

↘ Decrease **33%** compared to Mar-24

↓ **432** ton less than the monthly average rate in 2024.

❖ Accumulated 3 month of 2025 reaches **4.97** thousand tons, and the rate is **18%** of total in 2024

Changes in percentage of export value to ASEAN, Mar-2025



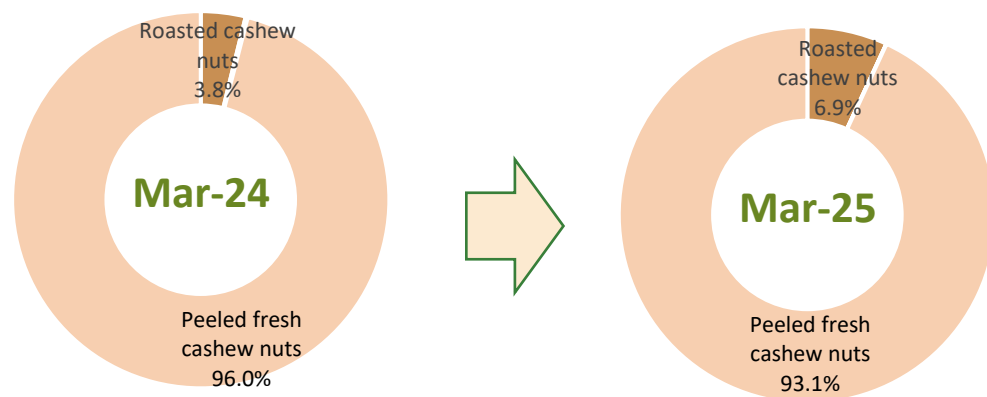
Changes in percentage of export value to ASEAN, Mar-2025



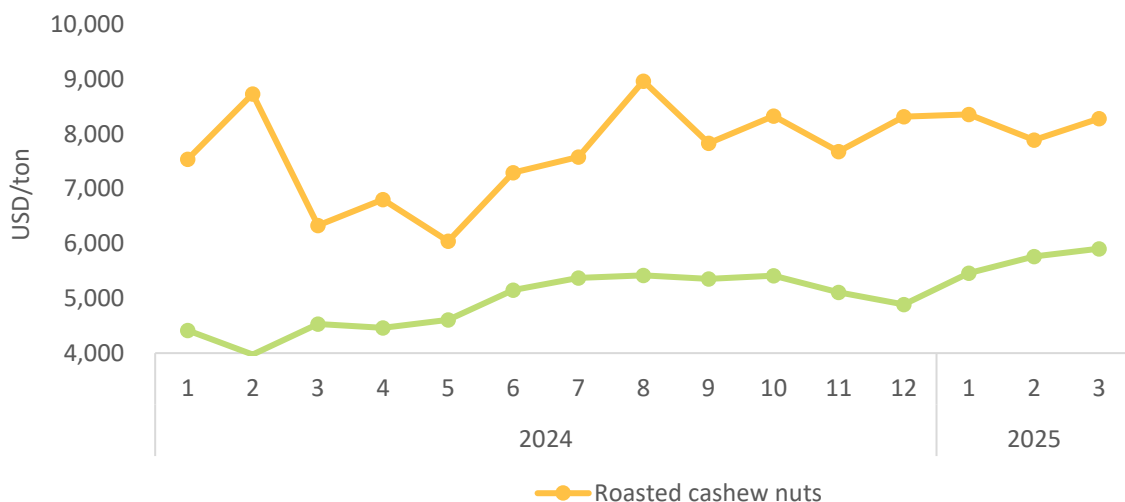


CASHEW NUTS

Structure of exports by products to ASEAN, Mar-2025



Average export cashew nuts price to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Peeled fresh cashew nuts

Value: **10.8** Mil. USD

Increase **114%** compared to Feb-25

Decrease **0.7%** compared to Mar-24



Roasted cashew nuts

Value: **0.8** Mil. USD

Increase **94%** compared to Feb-25

Increase **84%** compared to Mar-24

Peeled fresh cashew nuts

The average export price in Mar-25 is **5.906** USD/ton; **increase 2.5%** compared to the previous month; and **increase 30.3%** compared to the same month in 2024.

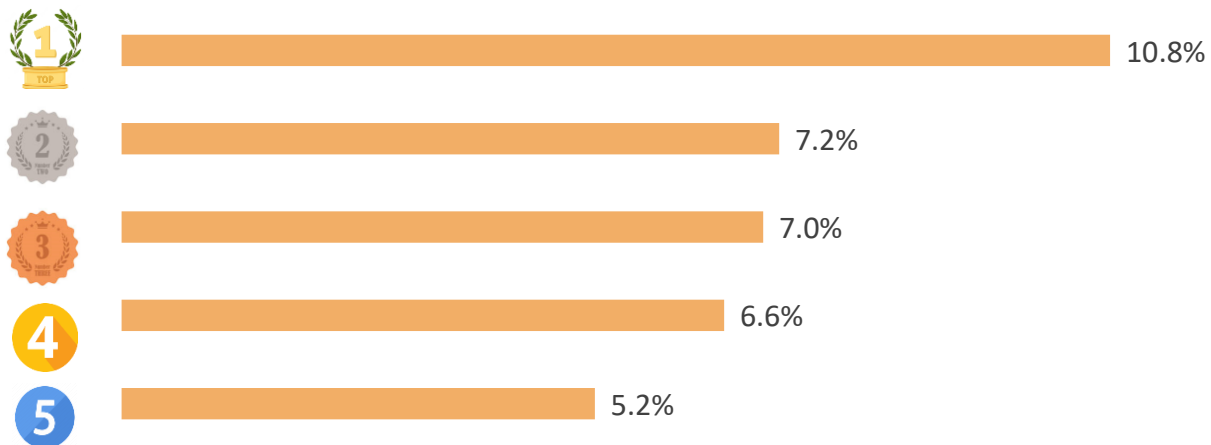
Roasted cashew nuts

The average export price in Mar-25 is **8.282** USD/ton; **increase 5.0%** compared to the previous month; and **increase 30.8%** compared to the same month in 2024.

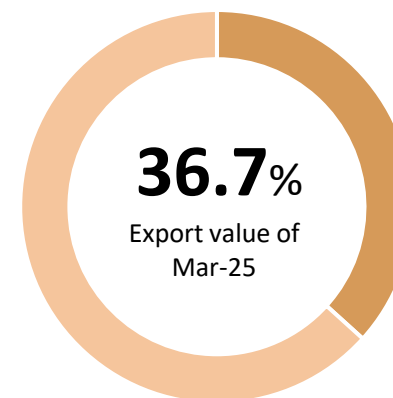


CASHEW NUTS

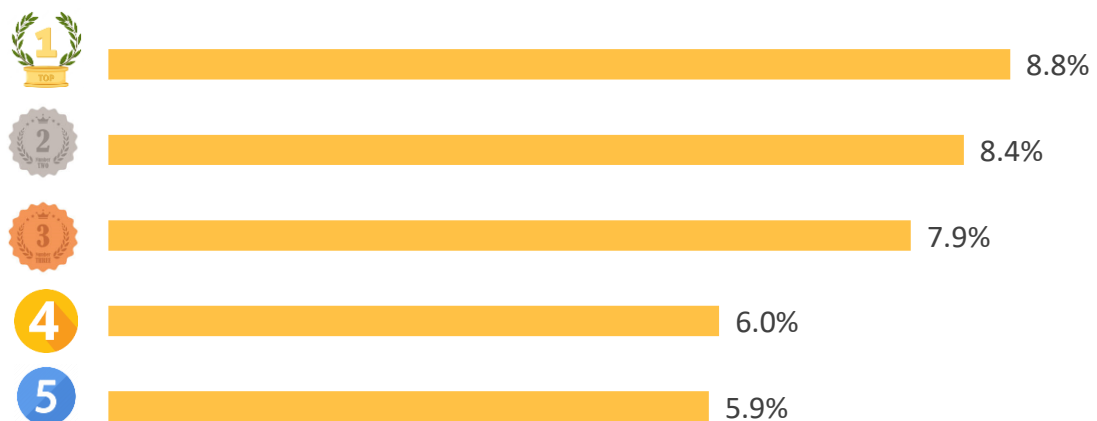
TOP 5 export enterprises by value to ASEAN, Mar-2025



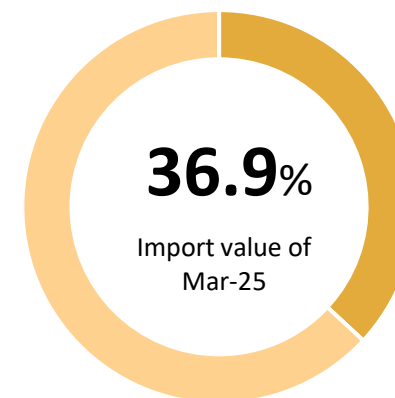
Value ratio of TOP 5 export enterprises to ASEAN, Mar-2025



TOP 5 export enterprises by volume to ASEAN, Mar-2025



Volume ratio of TOP 5 export enterprises to ASEAN, Mar-2025



CASHEW NUTS

SPOTLIGHT



Cambodian cashew nuts still have good quality despite prolonged cold weather

According to the Ministry of Agriculture, Forestry and Fisheries of Cambodia, the prolonged cool weather has not affected the quality of cashew nuts. In Kampong Thom Province, the harvest progress has reached approximately 55% and is expected to be completed by the end of May. This year's cashew nuts have maintained high quality, averaging 95–100 kernels per kilogram, and the harvesting period is projected to be longer than in previous years.

At the start of the harvest season, the farm-gate price for fresh cashew nuts was approximately USD 1.60 per kilogram. Currently, prices range from USD 1.18 to USD 1.28 per kilogram, depending on region and quality. This represents the highest price level in the past five years (2021–2025) due to strong market demand, including during the Khmer New Year.

Source: phnompenhpost.com



Witworths Company wants to buy processed cashew nuts, dried fruits from Cambodia

On April 30, 2025, Whitworths Ltd. expressed its interest in purchasing processed cashew nuts and dried fruits from Cambodia for distribution in the United Kingdom. This proposal was discussed during a meeting between the company's representatives and Cambodia's Minister of Commerce, Samheng Bora. As part of the visit, the Whitworths delegation will inspect several local cashew processing facilities to assess product quality, compliance with standards, and the export potential of Cambodian products.

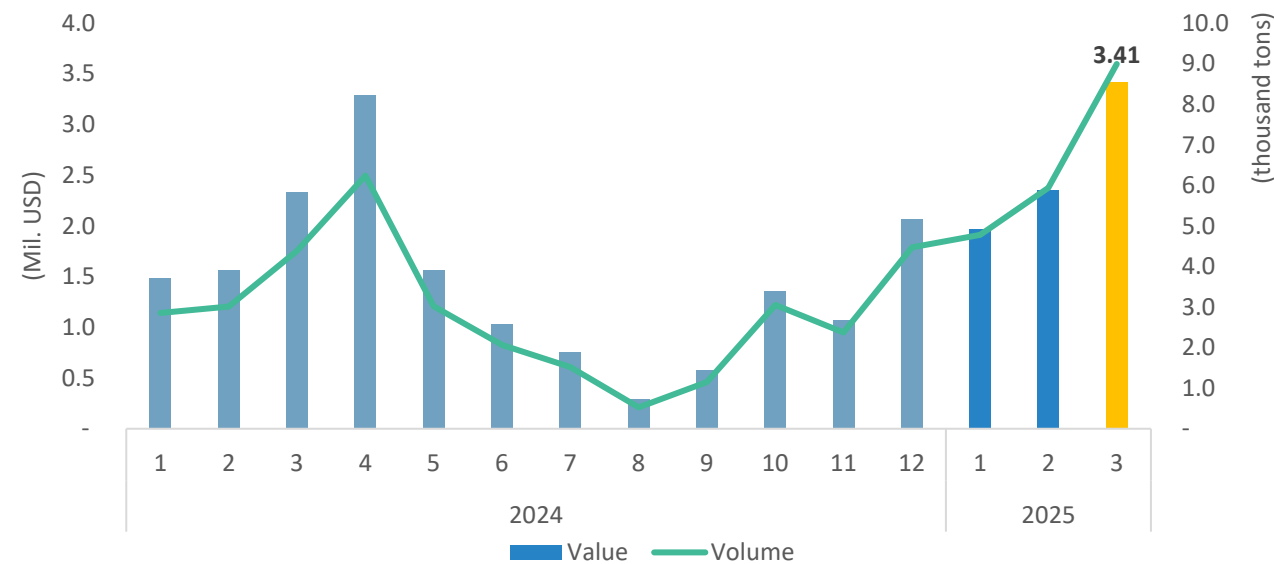
Source : khmertimeskh.com





CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Mar-25



Export results to ASEAN, Mar-25

VALUE

3.41 Mil. USD

↗ Increase **45%** compared to Feb-25

↗ Increase **38%** compared to Mar-24

↑ **1.05** Mil. USD more than the monthly average rate in 2024.

❖ Accumulated 3 month of 2025 reaches **7.74** Mil.USD, and the rate is **27.3%** of total in 2024.

VOLUME

8.99 thousand tons

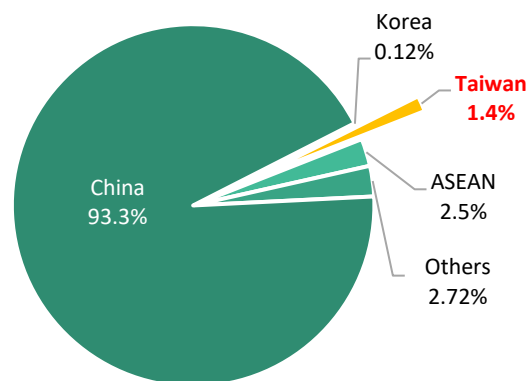
↗ Increase **51%** compared to Feb-25

↗ Increase **89%** compared to Mar-24

↑ **4.3** thousand tons more than the monthly average rate in 2024.

❖ Accumulated 3 month of 2025 reaches **19.7** thousand tons, and the rate is **34.8%** of total in 2024.

Percentage of export value to ASEAN, Mar-25



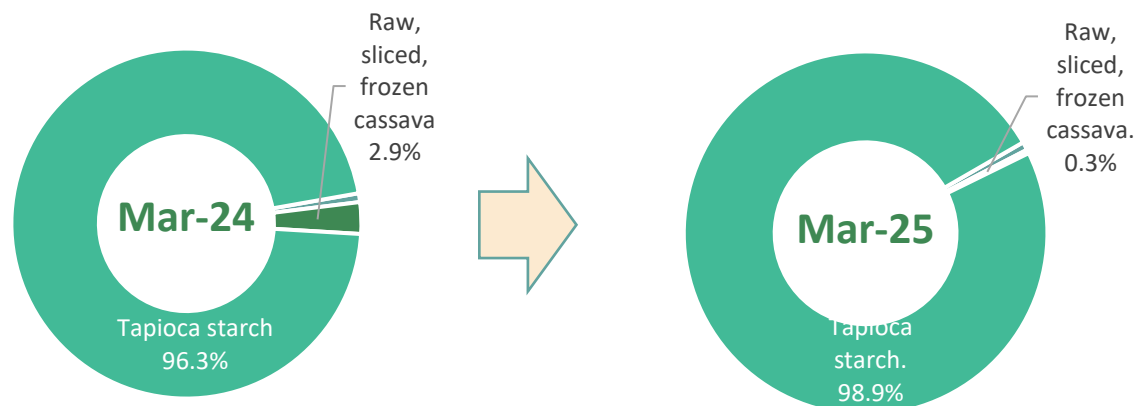
Changes in percentage of export value to ASEAN, Mar-25



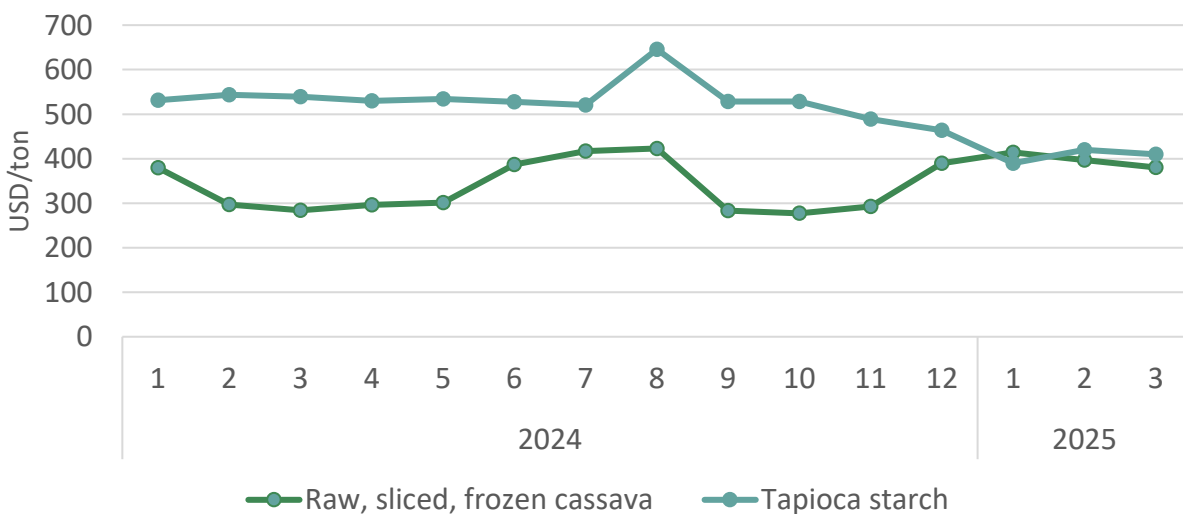


CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Mar-2025



Percentage of export value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Raw, sliced, frozen cassava

Value: **10.3** thousand USD

Increase **26.3%** compared to Feb-25

Decrease **50.5%** compared to Mar-24



Tapioca starch

Value: **3.04** Mil. USD

Increase **19%** compared to Feb-25

Decrease **84.8%** compared to Mar-24

Tapioca starch

The average export price in Mar-25 is **381** USD/ton; decrease **4.2%** compared to the previous month; and decrease **29.4%** compared to the same month in 2024.

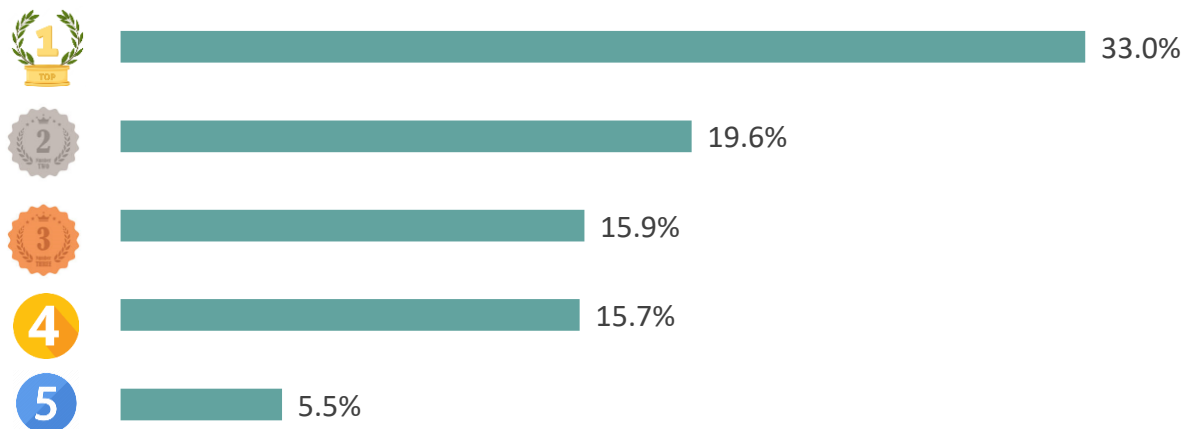
Raw, sliced, frozen cassava

The average export price in Mar-25 is **410** USD/ton; decrease **2.4%** compared to the previous month; and increase **44.5%** compared to the same month in 2024.

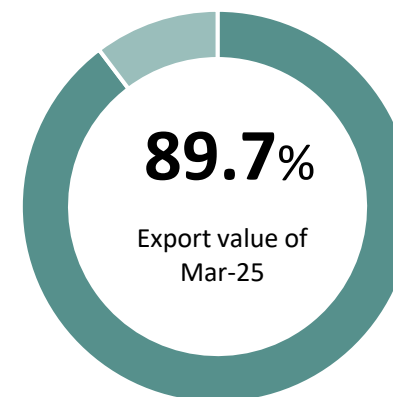


CASSAVA & CASSAVA PRODUCTS

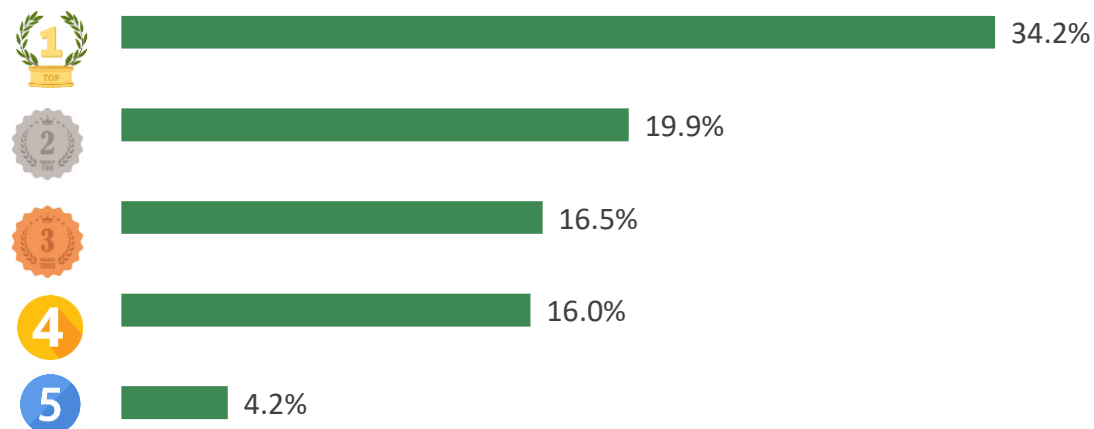
TOP 5 export enterprises by to ASEAN, Mar-2025



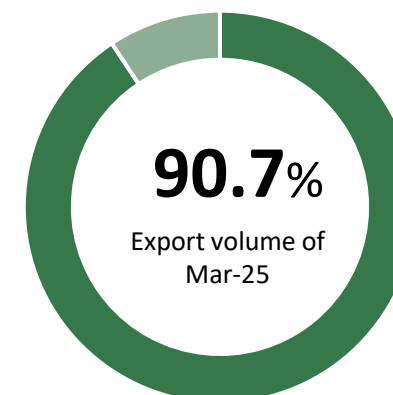
Value ratio of TOP 5 export enterprises to ASEAN, Mar-2025



TOP 5 export enterprises by volume to ASEAN, Mar-2025



Volume ratio of TOP 5 export enterprises to ASEAN, Mar-2025



CASSAVA & CASSAVA PRODUCTS

SPOTLIGHT



Cambodia signs MoU to export 300,000 tons of cassava to Thailand

From 22 to 25 April 2025, the Ministry of Commerce of Cambodia had meeting with the Federation of Thai Industries and witnessed the signing of a memorandum of understanding between Thailand and Cambodia. Under this agreement, the Koson Group will buy 300,000 tonnes of cassava and 100,000 tonnes of red maize from Cambodia each year. The parties also discussed strategies for developing the supply chain and promoting bilateral investment, with particular emphasis on agricultural commodities and logistics. The visit objective is to identify market opportunities and assess Cambodia's capacity to supply raw materials.

Source: moc.gov.kh



Indonesian frozen cassava enters the Dutch and Curacao markets

CV Nusantara Jaya Food, based in East Java, Indonesia, has promoted to export operations of frozen cassava to the Netherlands and Curaçao, becoming the unique supplier in both markets. The company also cooperated with local farmers to provide high quality seed and buy cassava, while simultaneously adding sweet potato.

The processing facility capacity is about 300 metric tons per month, although current utilization remains below full capacity. In response, strategic plans are being implemented to expand into additional international markets, including Singapore in 2025. All product lines have obtained Hazard Analysis and Critical Control Points (HACCP) certification, ensuring compliance with internationally recognized food-safety standards.

Source : trubus.id





Thai farmers protest ethanol imports from Brazil



Thai cassava farmers have raised their opposite voice to the Cassava Policy and Management Council's proposal to permit ethanol imports from Brazil, arguing that such a measure would depress domestic cassava prices and inflict significant harm on Thailand's ethanol-production sector.

The Ministry of Agriculture of Thailand projects a slight increase in cassava output for the 2025 crop year (October 2024 to September 2025), with approximately 8.63 million rai (1.38 million ha) harvested and total production of 27.2 million tonnes, despite an anticipated 0.91 percent decline in average yield compared with the previous year.

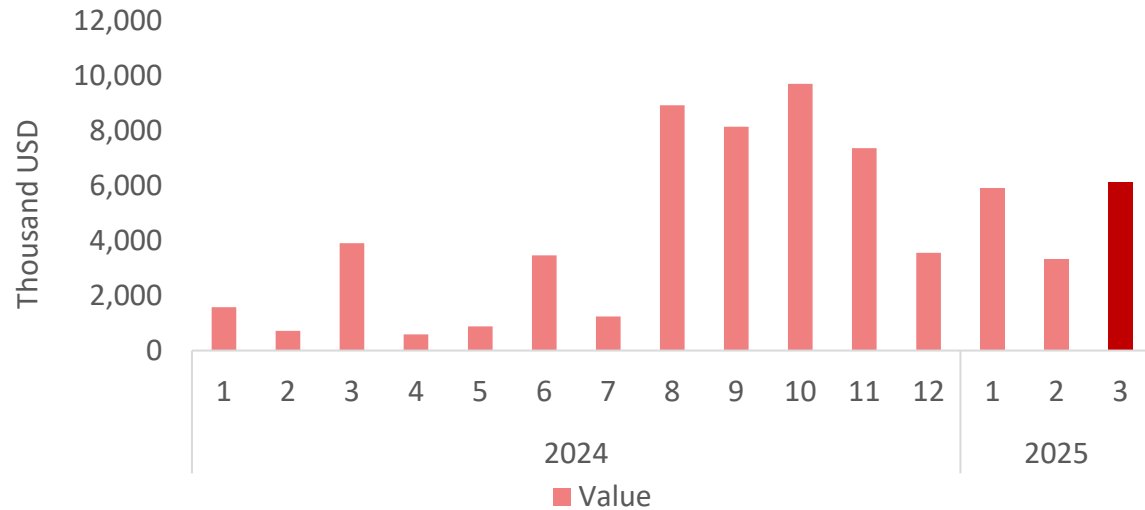
To improve production efficiency and mitigate cassava mosaic disease, the Thai government has launched a THB 800 million (approximately USD 23.2 million) to develop disease-resistant cassava variety. Simultaneously, processing and export of cassava products—such as dried chips and pellets—are demonstrating recovery, with Q1 2025 output reaching 2.13 million tonnes (about 5.09 million tonnes of fresh cassava).





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025

VALUE



6.13

Mil. USD

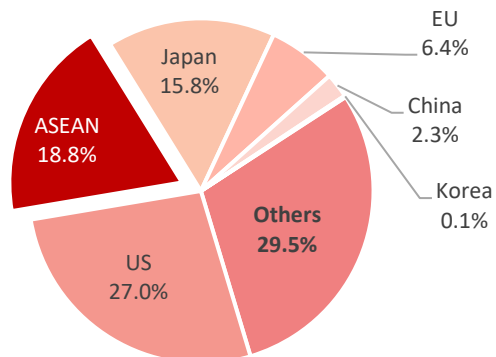
↗ Increase **84%** compared to Feb-25

↗ Increase **56.8%** compared to Mar-24

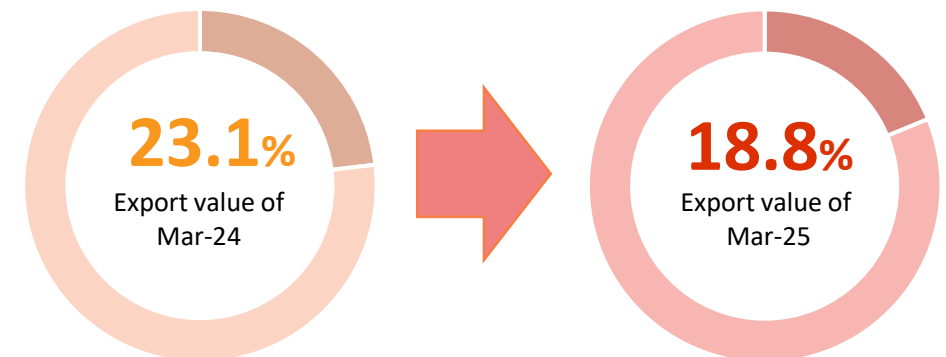
↗ **1.96 Mil. USD** more than the monthly average rate in 2024.

◇ Accumulated 3 month of 2025 reaches **15.4 Mil. USD**, and the rate is **30.7%** of total in 2024.

Percentage of export value to ASEAN, Mar-2025



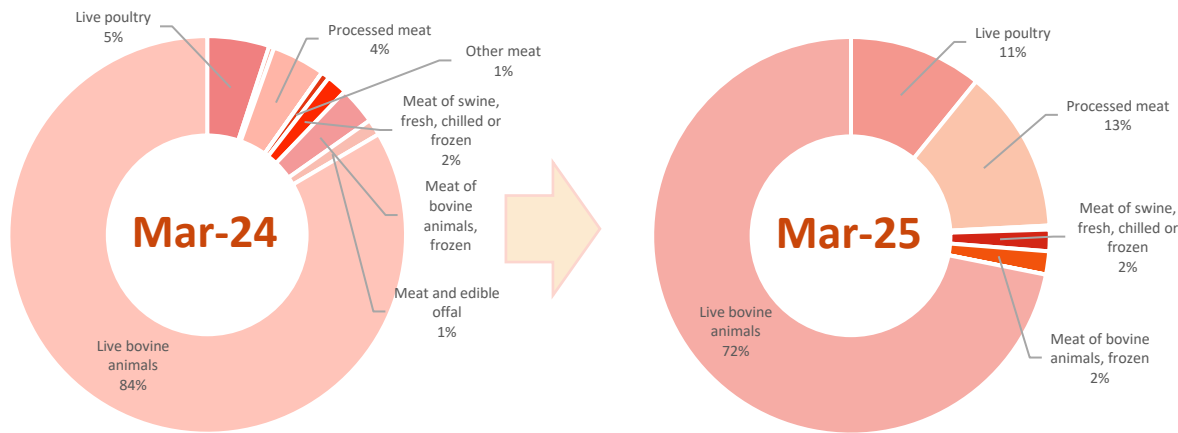
Changes in percentage of export value to ASEAN, Mar-2025





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Live bovine animals

Value: **4.4** Mil. USD
Increase **65.8%** compared to Feb-25
Increase **35%** compared to Mar-24



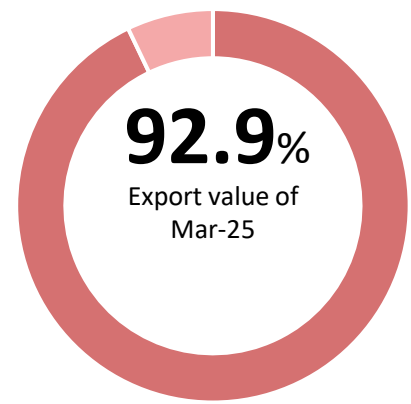
Processed meat

Value: **665.2** thousand USD
Increase **57.4%** compared to Feb-25
Increase **237.6%** compared to Mar-24

Percentage of export value to ASEAN, Mar-2025



Changes in percentage of export value to ASEAN, Mar-2025

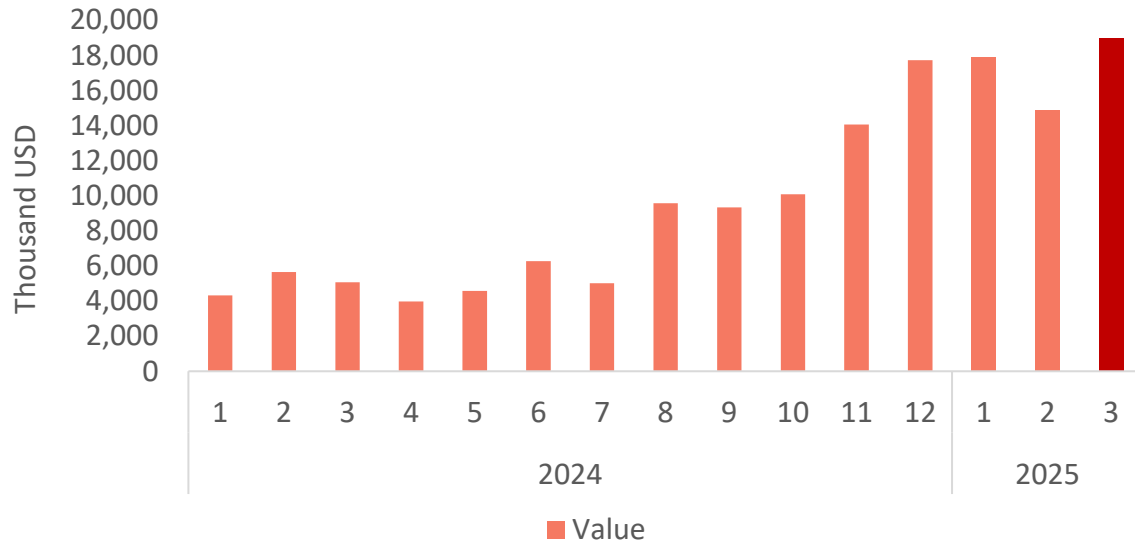


Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Mar-2025



Import results to ASEAN, Mar-2025



19.0

Mil. USD

VALUE

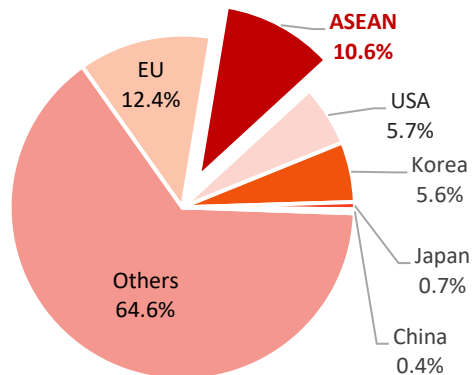
↗ Increase **27.7%** compared to Feb-25

↗ Increase **274.1%** compared to Mar-24

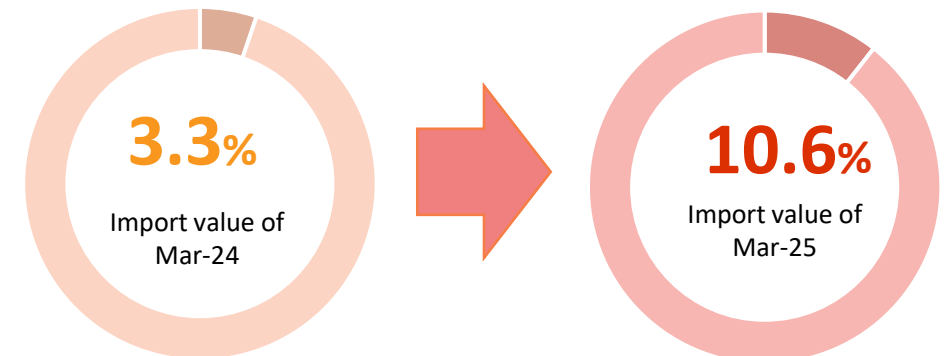
↗ **11.0 Mil. USD** more than the monthly average rate in 2024.

◇ Accumulated 3 month of 2025 reaches **51.8 Mil. USD**, and the rate is **54.1%** of total in 2024.

Percentage of import value to ASEAN, Mar-2025



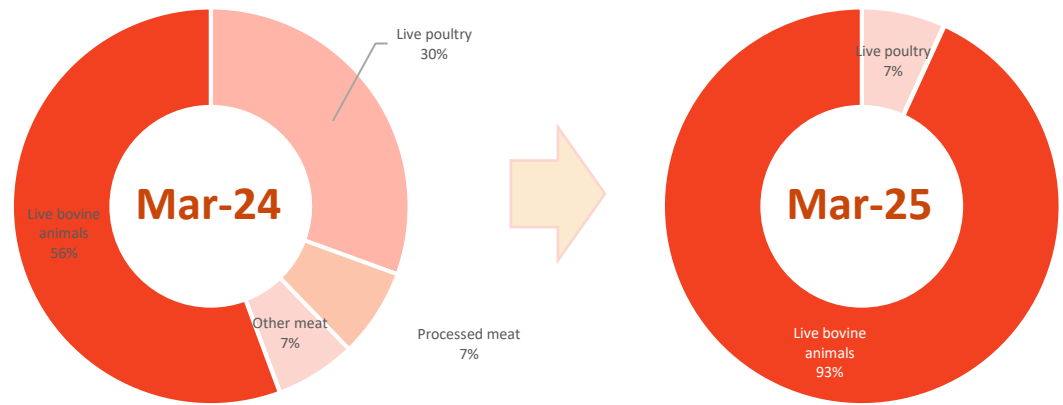
Changes in percentage of import value to ASEAN, Mar-2025





MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Mar-2025



Import results to ASEAN, Mar-2025



Live bovine animals

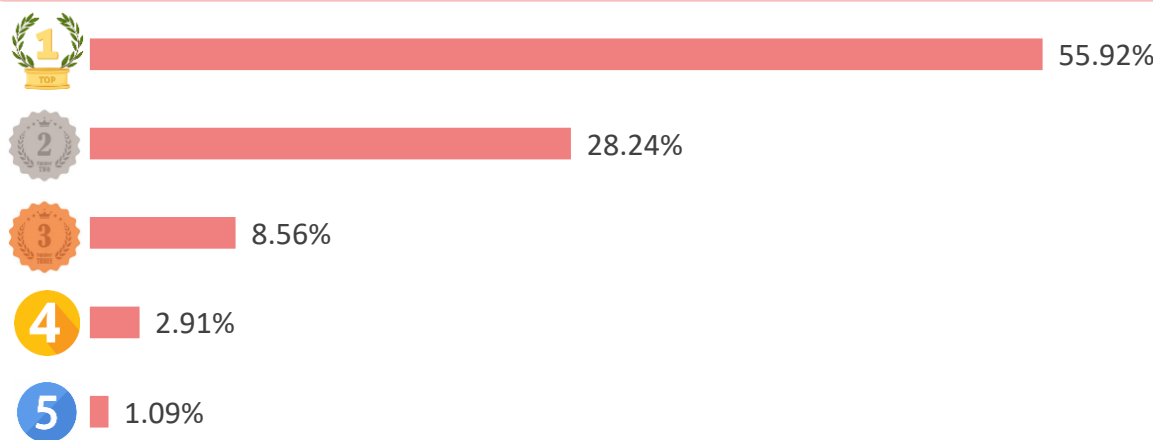
Value: **17.7** Mil. USD
Increase **30.8%** compared to Feb-25
Increase **52 times** compared to Mar-24



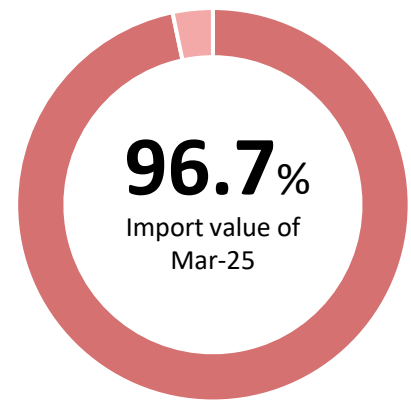
Live poultry

Value: **1.3** Mil. USD
Increase **15.8%** compared to Feb-25
Decrease **16.9%** compared to Mar-24

Percentage of import value to ASEAN, Mar-2025



Changes in percentage of import value to ASEAN, Mar-2025



Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS

SPOTLIGHT



The Thai Beef Cattle Association and more than 60 organizations staged a demonstration at the Ministry of Agriculture and Cooperatives to protest the government's proposal to permit imports of U.S. beef in order to offset the trade deficit. The Association argued that this measure would seriously undermine the domestic market, contravene the ban on growth-promoting hormones in livestock production, and threaten the livelihoods of over 1.4 million farmers. They further warned that importing American beef could damage the reputation of Thai beef exports in stringent markets such as Malaysia, Vietnam, and China.

Source: news.foodmate.net





For feedback, please send to:

**Center for Information and Services in Agriculture and Environment
(AGREINFOS)**

Institute of Strategy and Policy on Agriculture and Environment

Address: *16 Thuy Khue, Thuy Khue Ward, Tay Ho District, Hanoi*

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

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

