

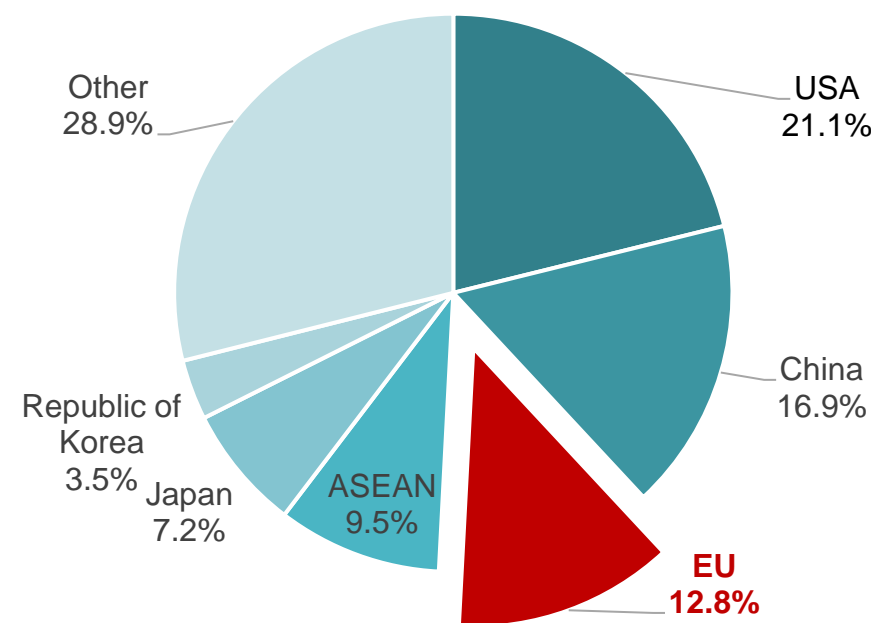


MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO THE EU MARKET

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

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



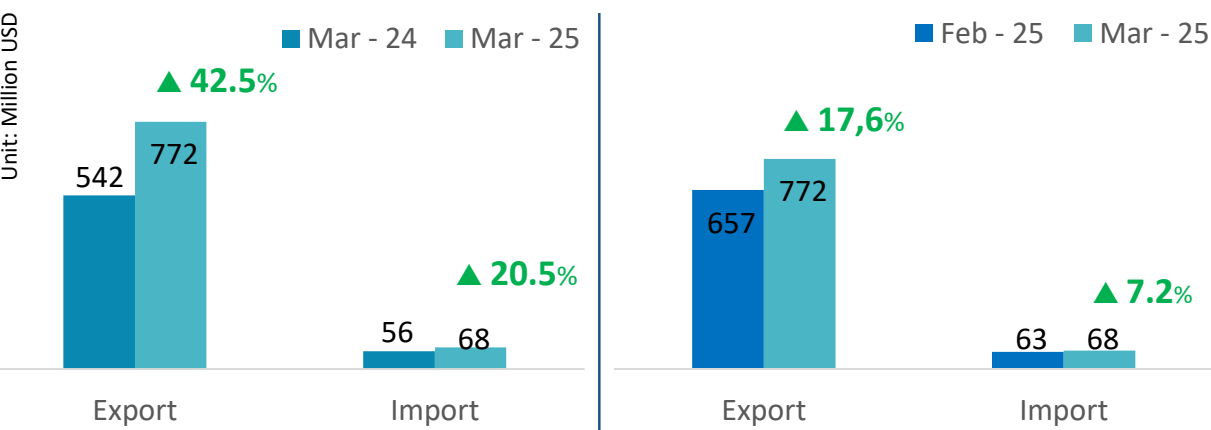
Changes in export proportion of AFF product to the EU Mar-2025 compared to Feb-25 and Mar-24

	Export value (mil. USD)	Compared to Feb-25	Compared to Mar-24
USA	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%
Republic of Korea	211	▼ 0.1%	▼ 0.3%
Total export	6,056		

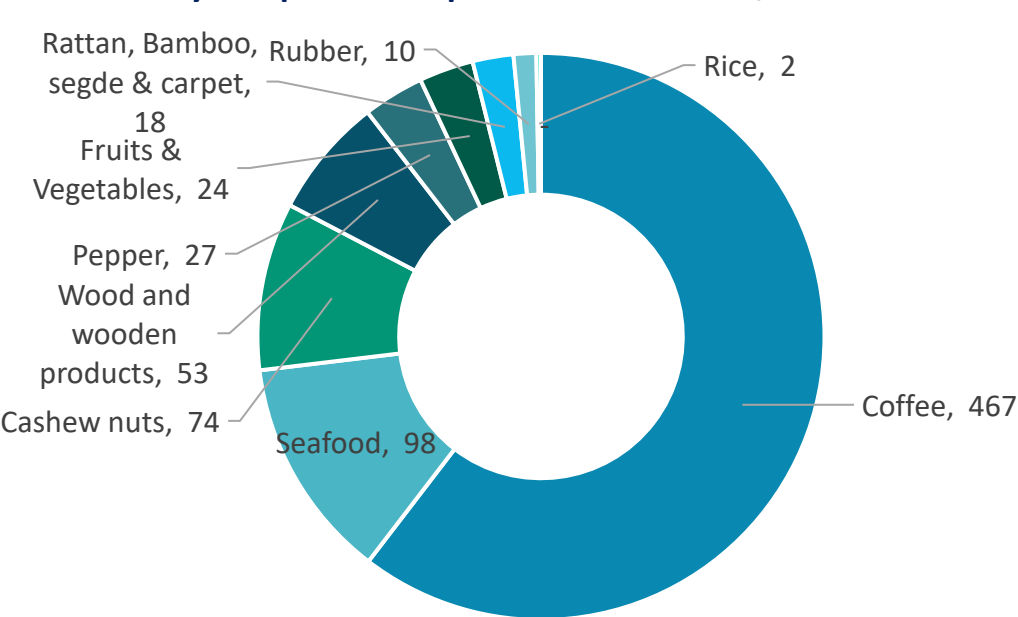
Source: Calculated from data of the General Department of Customs

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

AFF product import-export turnover between Vietnam and the EU, Mar-2025

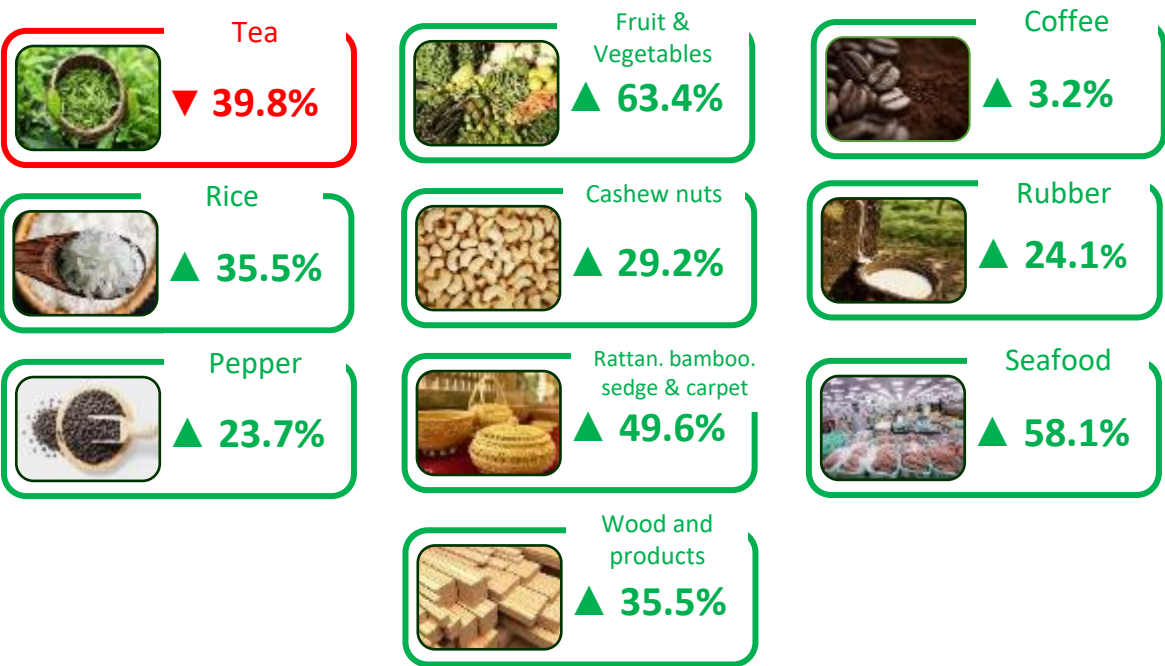


Key AFF product export value to the EU, Mar-2025

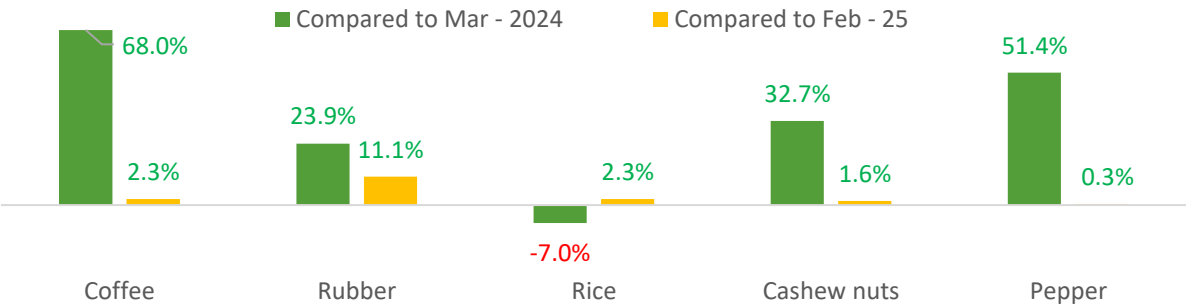


Unit: Million USD

Changes in key AFF product export value to the EU in Mar-2025 compared to Feb-2025



Changes in average export value of key AFF products to the EU in Mar-2025 compared to Mar-2024 and Feb-2025



EU issues new regulations on tuna import

Vietnam SPS Office has released information regarding updated requirements for exporting tuna to the European Union (EU) market. Specifically, for frozen tuna, transport vessels must meet design requirements and be equipped with real-time monitoring systems that continuously record the temperature of the brine solution on

board using electronic temperature sensors. These systems must ensure that the core temperature of the frozen product reaches at least -18°C .

Food enterprises must provide access to brine temperature data upon request by competent authorities. In addition, they are required to develop a capacity plan for the freezing systems on transport vessels. Whole tuna (species belonging to *Thunnus* and

Katsuwonus) may be frozen continuously in brine at a core temperature of -18°C , while also complying with certain technical conditions such as: freezing time, seawater cleaning procedures, salinity concentration of the brine, and the temperature at the final freezing stage — all intended to preserve the fish's flavor and quality.

Source: KINHTEODOHI.VN



Red alert for the EU economy

President Donald Trump's decision to impose a 20% tariff on exports from Europe has led economists to sharply reduce their growth forecasts for the Eurozone in 2025. This tariff shock will weaken both consumption and investment, raise the risk of a recession, and prompt the European Central Bank (ECB) to cut interest rates earlier than expected.

According to ABN Amro, the Eurozone economy could approach zero growth in the short term and bottom out in Q3/2025, with a gradual recovery by year-end and a stronger rebound in 2026. However, the pace of recovery will depend on several factors, including the U.S. rolls back tariffs, EU trade redirection efforts, and governments' support policies.

ABN Amro also forecasts that tariffs and weakened global demand will cause actual inflation in Europe to fall below the ECB's 2% target, particularly due to declining energy prices. This will further reinforce the likelihood of an interest rate cut by the ECB as early as April 2025.

Bank of America estimates that the U.S. tariff measures could reduce global

GDP by 0.5 percentage points. For the Eurozone alone, growth could fall by 0.4–0.6 percentage points if no effective countermeasures are taken. On the other hand, the impact on inflation is expected to be limited.

Bank of America also predicts that the ECB may cut interest rates multiple times in 2025, possibly lowering the deposit rate to 1.5% by September. The first rate cut could come as early as April if economic conditions continue to deteriorate.

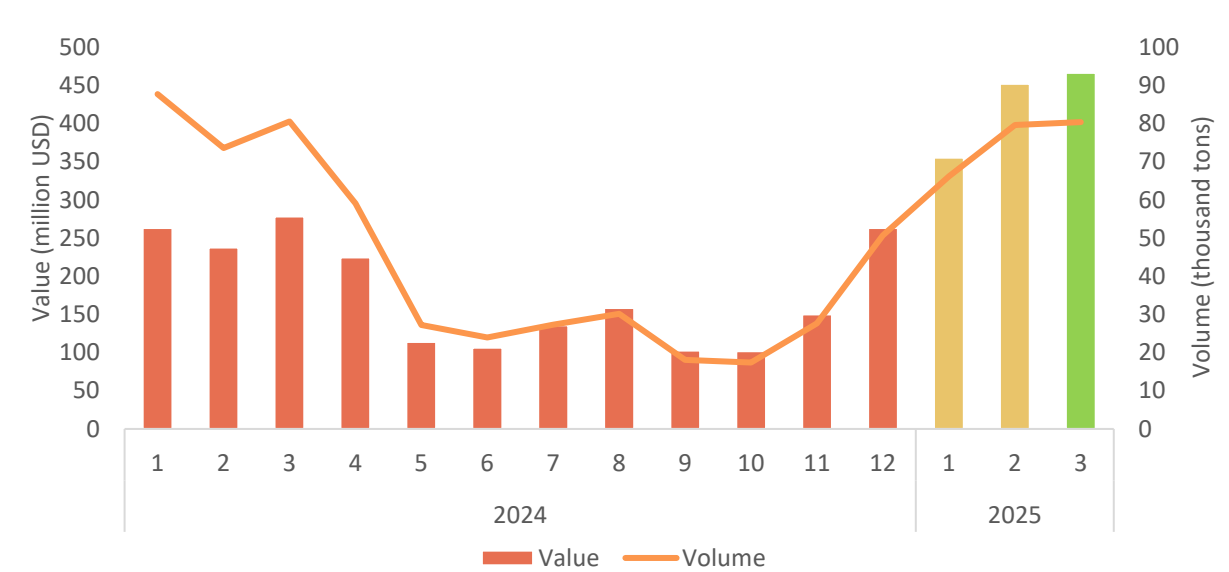
Source: VINANET.VN



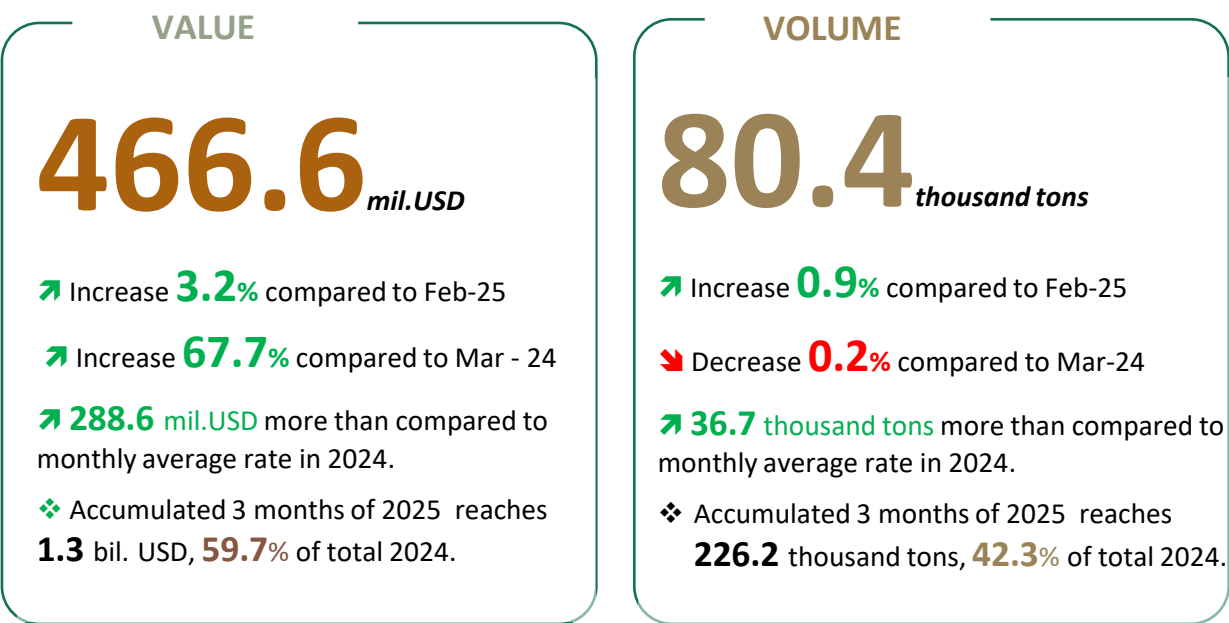


COFFEE

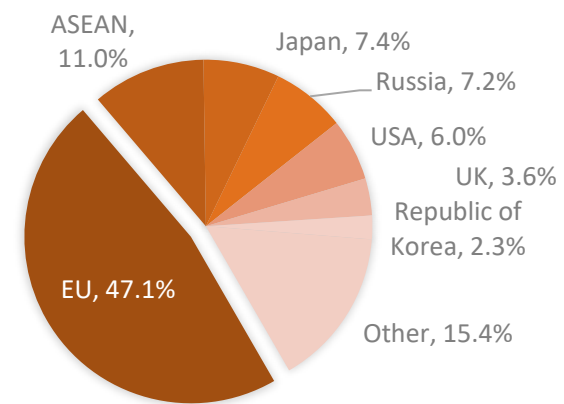
Export volume and value to the EU, Mar-2025



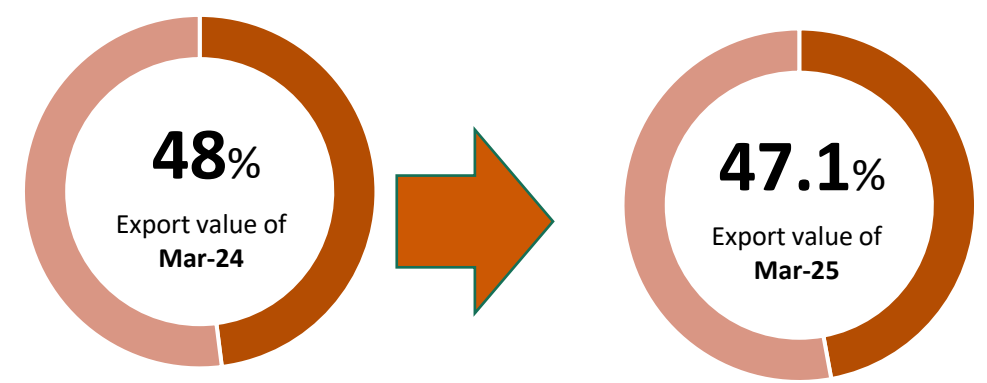
Export results to the EU, Mar-2025



Percentage of export value to the EU, Mar-2025



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

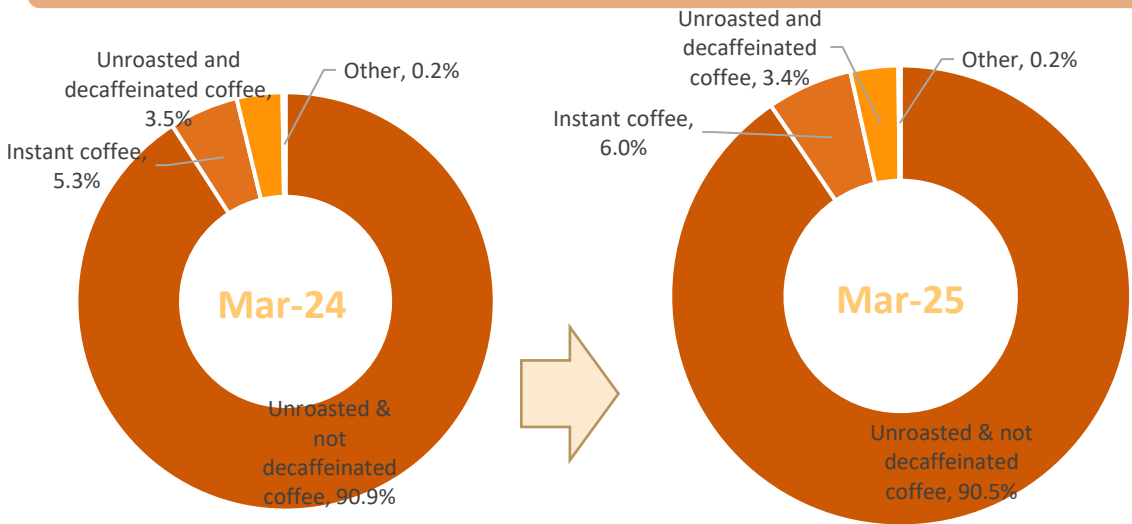


Source: Calculated from data of the General Department of Customs

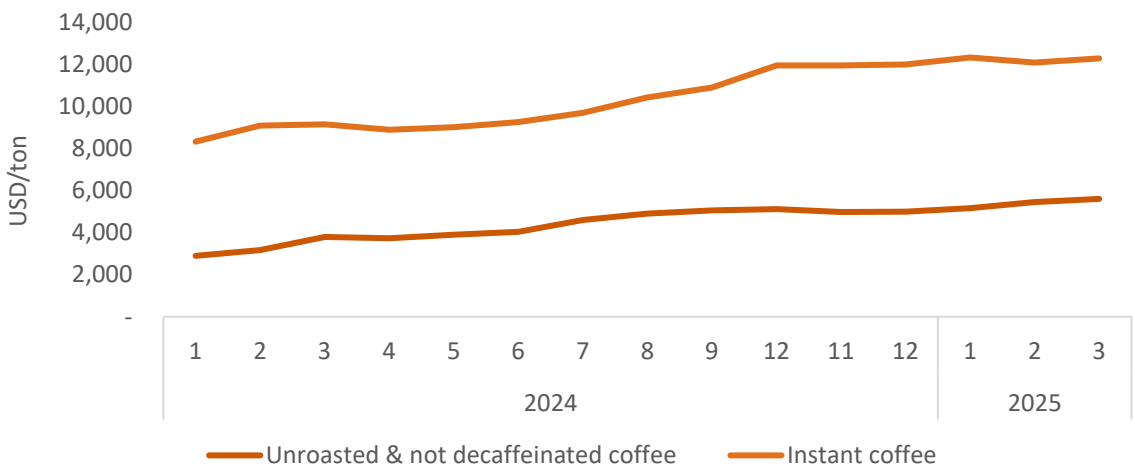


COFFEE

Structure of exports by products to the EU, Mar-2025



Average export price to the EU, Mar-2025



Source: Calculated from data of the General Department of Customs

Export results to the EU, Mar-2025



Unroasted & not decaffeinated coffee

Value: **432.1** mil.USD
Increase **2.5%** compared to Feb-25
Increase **72.2%** compared to Mar-24



Instant coffee

Value: **28.6** mil.USD
Increase **20.9%** compared to Feb-25
Increase **94.3%** compared to Mar-24



Unroasted and decaffeinated coffee

Value: **16.1** mil.USD
Increase **28.8%** compared to Feb-25
Increase **64.8%** compared to Mar-24

Instant coffee

The average export price in Mar-25 is **12.279** USD/ton; increase **1.7%** compared to the previous month, and increase **34.2%** compared to the same month 2024.

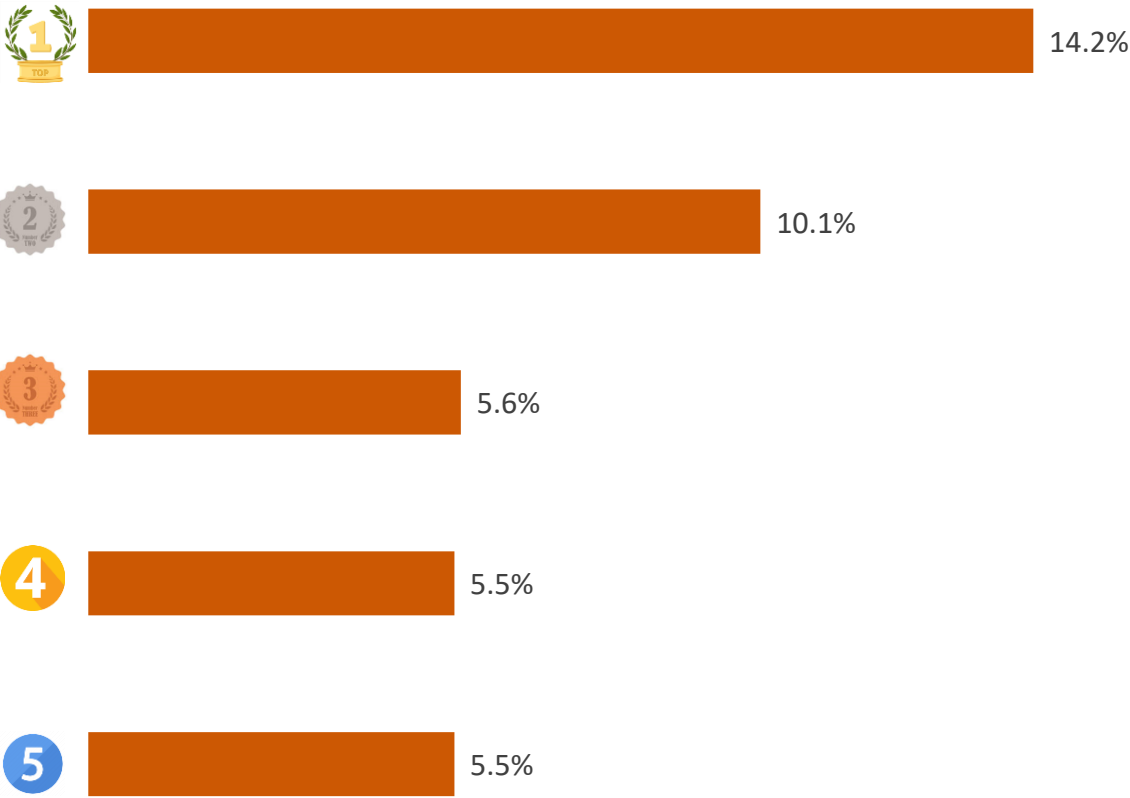
Unroasted & not decaffeinated coffee

The average export price in Mar-25 is **5.599** USD/ton; increase **2.6%** compared to the previous month, and increase **47.6%** compared to the same month 2024.

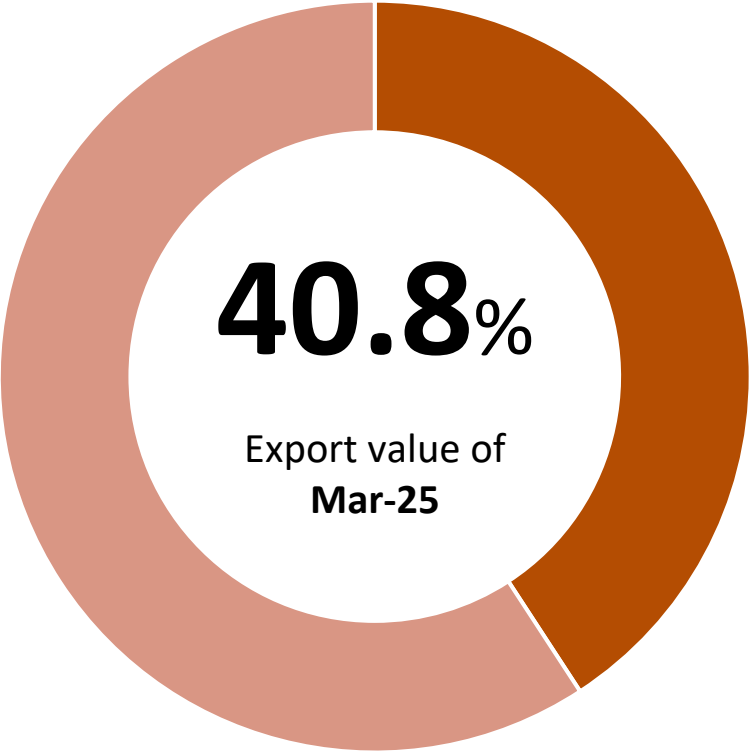


COFFEE

TOP 5 export enterprises by value to the EU, Mar-2025



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



Source: Calculated from data of the General Department of Customs



COFFEE

SPOTLIGHTS

EUROPEAN COFFEE CHAIN MARKET

According to the Project Café Europe 2025 report by World Coffee Portal, the branded coffee shop market in Europe has experienced the fastest growth in the past five years. Specifically, the number of outlets increased by 4.7% over the past 12 months, reaching 51,042 stores — despite cost pressures from rising green coffee bean prices and global inflation.

Among the 50 surveyed markets, 33 countries recorded growth in the number of stores, including 15 of the region's 20 largest markets. The UK continued to lead with 11,456 stores, followed by Germany (7,428) and Russia (5,157).

McCafé remains the largest branded coffee chain in Europe with 3,983 stores across 26 countries. Starbucks (3,534 stores) and Costa Coffee (3,097 stores) follow closely. The average price of a standard cappuccino in Europe rose by 7.6%, now averaging 3.69 EUR.





COFFEE

SPOTLIGHTS

EU RELAXES CERTAIN REGULATIONS UNDER THE DEFORESTATION LAW

The European Union (EU) is implementing adjustments to its deforestation regulations, aiming to reduce administrative burdens for importing enterprises. Instead of submitting detailed due diligence reports for every shipment, businesses will be allowed to submit annual reports, thereby reducing the frequency of supply chain partner audits.

According to EU Environment Commissioner – Mrs. Jessica Roswall, the main objective is to maintain the effectiveness of anti-deforestation policies while minimizing negative impacts. At the same time, it helps to reduce compliance costs for businesses. According to the European Commission, the new adjustment measures could help reduce administrative costs by up to 30%.

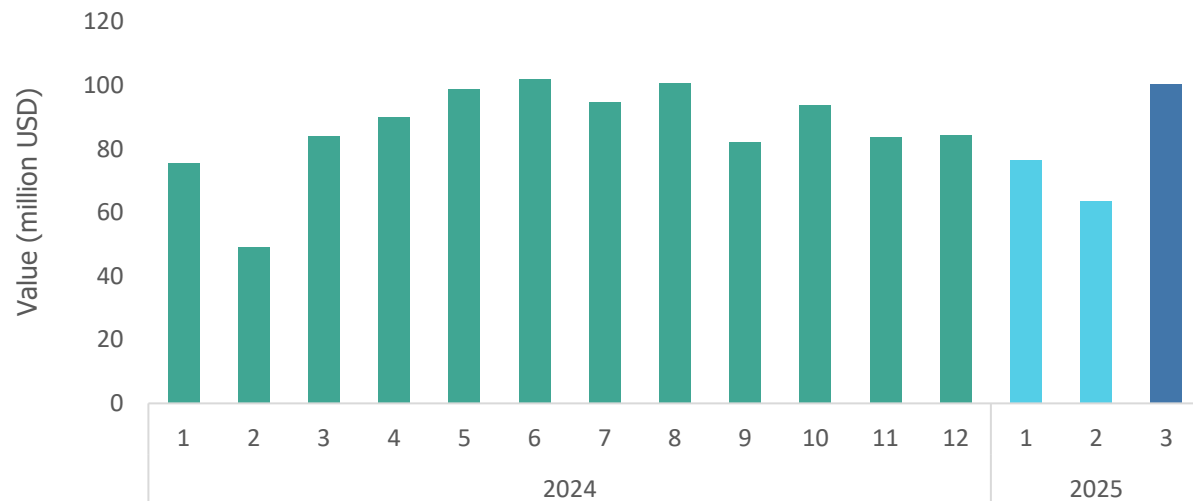
The EU has postponed the regulation's full enforcement until the end of 2025. In addition, the EU is expected to publish a list of countries categorized by deforestation risk levels before the end of June, helping to guide policy implementation in a transparent and targeted manner.



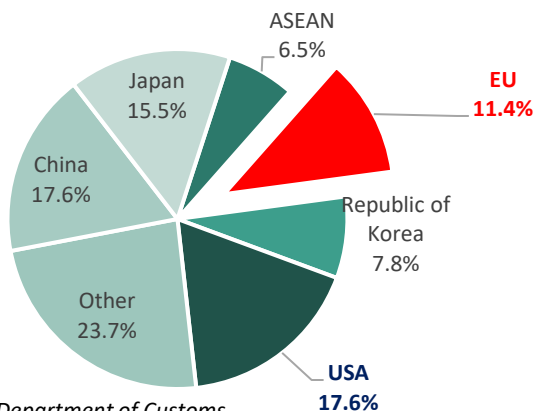


SEAFOOD

Export value to the EU, Mar-2025



Percentage of export value to the EU, Mar-2025



Export results to the EU, Mar-2025

VALUE

100.4 *mil.USD*



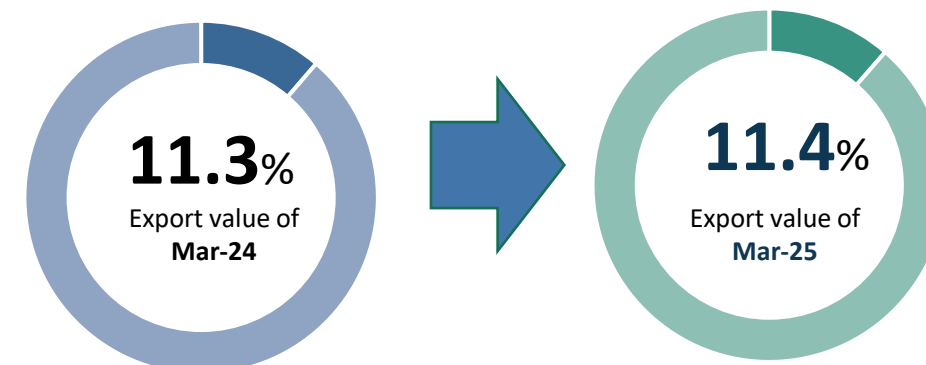
➤ Increase **58.1%** compared to Feb-25

➤ Increase **19.5%** compared to Mar-24

▲ **13.8 mil.USD** more than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **240.2** mil. USD, **23.1%** value export of 2024

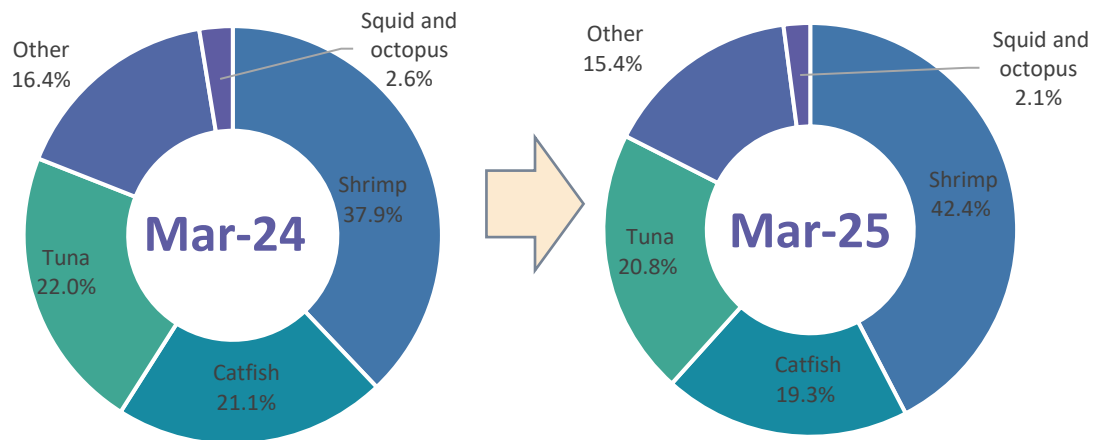
Changes in percentage of export value to the EU, Mar-2025



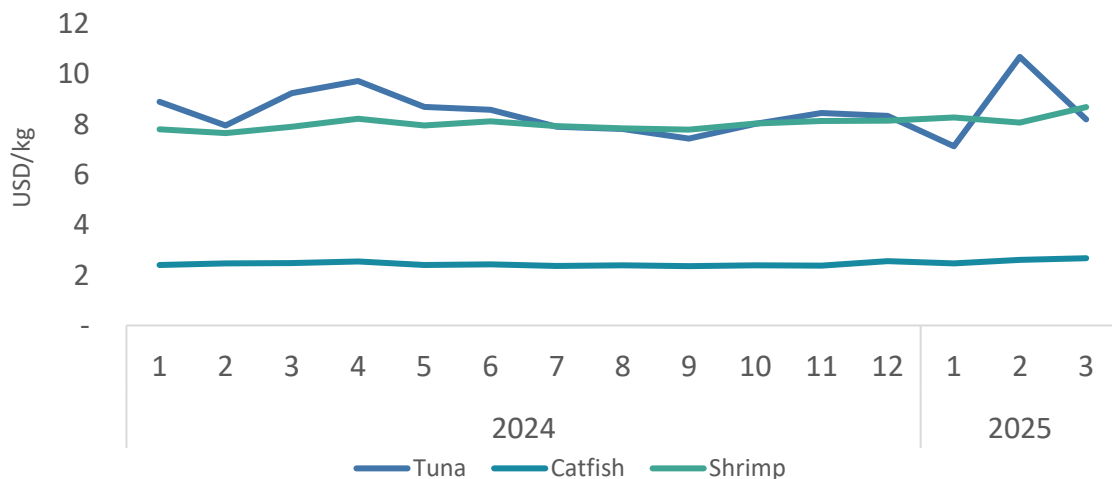


SEAFOOD

Structure of exports by products to the EU, Mar-2025



Average export price to the EU, Mar-2025



Export results to the EU, Mar-2025



Shrimp

Value: **42.5** mil.USD

Increase **58.1%** compared to Feb-25

Increase **19.5%** compared to Mar-24



Catfish

Value: **19.4** mil.USD

Increase **75.9%** compared to Feb-25

Increase **9.4%** compared to Mar-24



Tuna

Value: **20.9** mil.USD

Increase **45.5%** compared to Feb-25

Increase **13.2%** compared to Mar-24

Tuna

The average export price in Mar-25 is **8.2** USD/kg; **decrease 23.3%** compared to the previous month; and **decrease 11.3%** compared to the same month 2024.

Catfish

The average export price in Mar-25 is **2.7** USD/kg; **increase 2.6%** compared to the previous month; and **increase 8.0%** compared to the same month 2024.

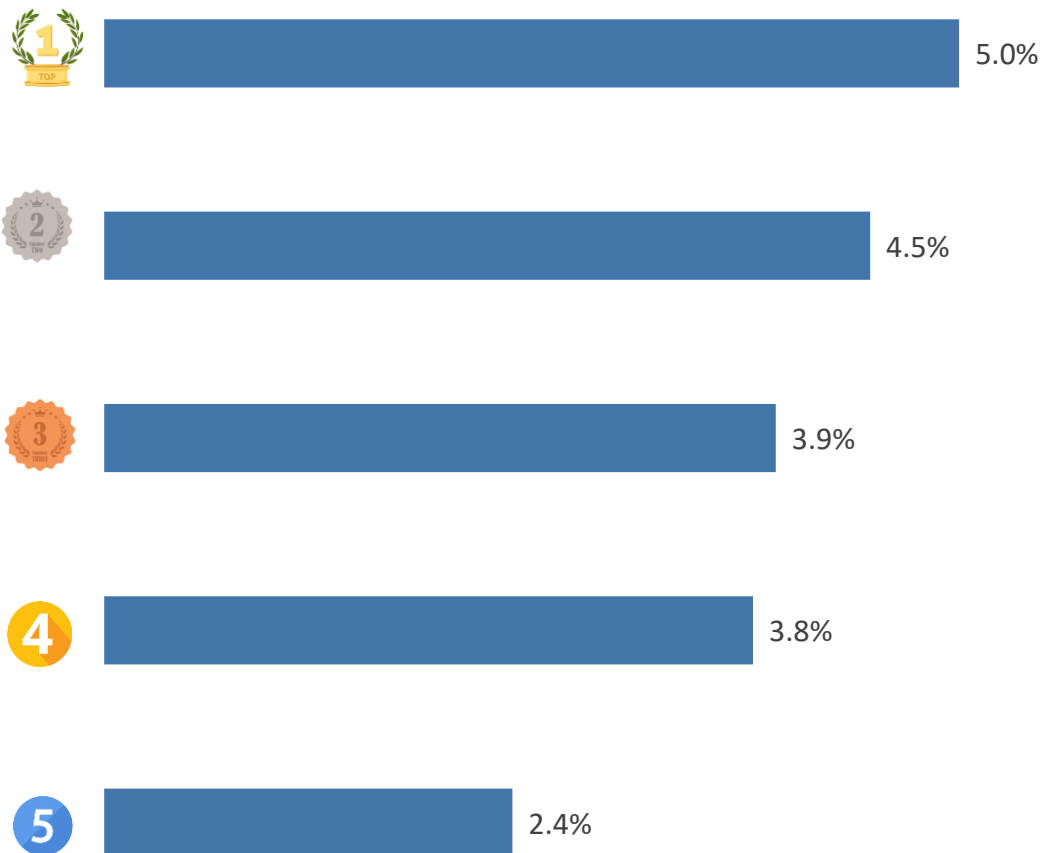
Shrimp

The average export price in Mar-25 is **8.7** USD/kg; **increase 7.6%** compared to the previous month; and **increase 9.9%** compared to the same month 2024.

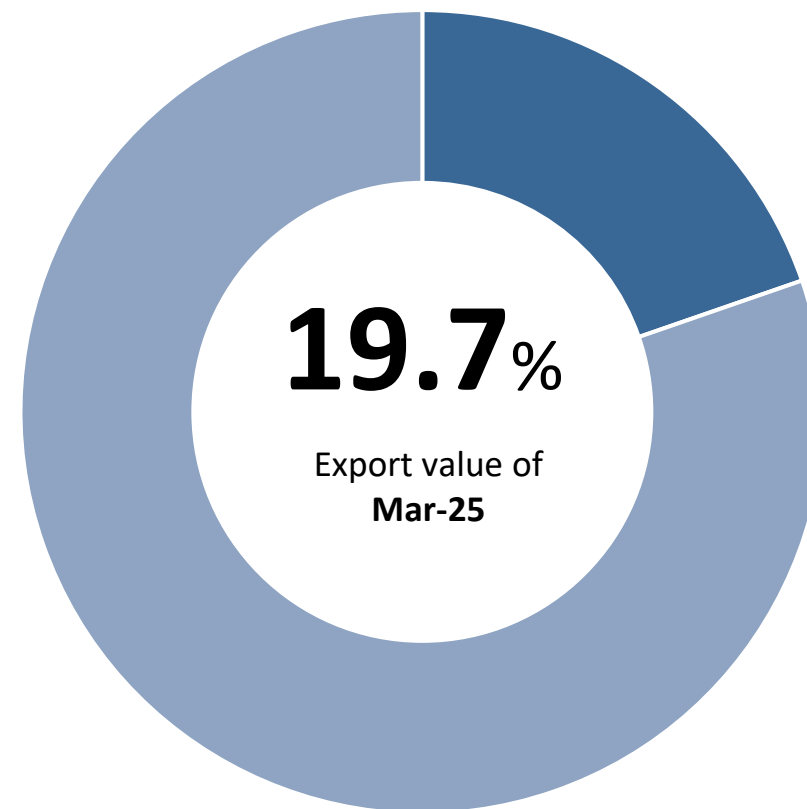


SEAFOOD

TOP 5 export enterprises by value to the EU, Mar-2025



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





SPOTLIGHTS

The European Commission (EC) has postponed the IUU inspection until the end of 2025

The European Commission (EC) has decided to postpone the 5th inspection mission to Vietnam on illegal, unreported, and unregulated (IUU) fishing from March 2025 to the end of the year. The decision was based on the EC's assessment that Vietnam has not yet to make sufficient progress in implementing previous recommendations—especially regarding the control of fishing vessels, handling of violations, and prevention of illegal fishing in foreign waters.

During an online working session in January 2025 between Vietnam's Ministry of Agriculture and Rural Development and the EC, the Commission pointed out several persistent issues that Vietnam must urgently address. These include the disconnection of the Vessel Monitoring System (VMS), ongoing violations of fishing boundaries, and serious cases such as the detention of fishing vessels from Kien Giang province by Thailand in February 2025. These were among the key reasons prompting the EC's decision to delay the inspection until year-end.

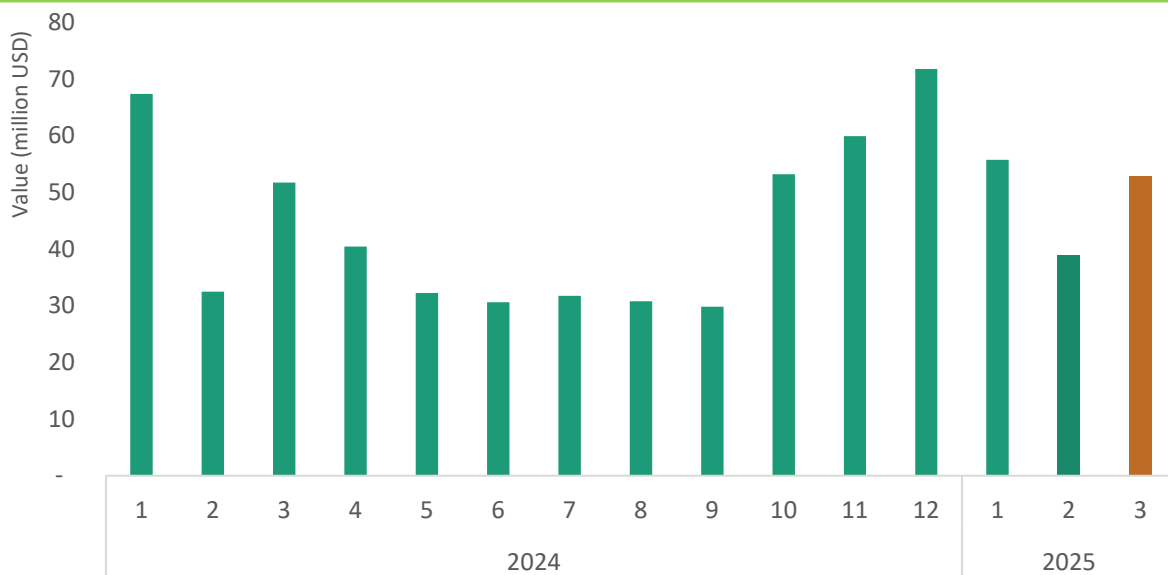
In addition, DG-MARE (Directorate-General for Maritime Affairs and Fisheries of the EC) has requested Vietnam to submit a progress report on IUU enforcement by September 15, 2025. If the report demonstrates positive and tangible improvements in resolving existing issues, the EC may proceed with the 5th inspection mission later this year, as previously scheduled.





WOOD AND WOODEN PRODUCTS

Export value to the EU, Mar-2025



Export results to the EU, Mar-2025



53

mil.USD

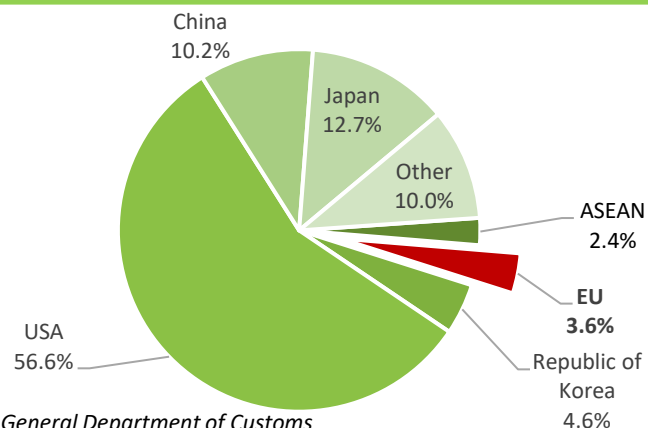
➤ Increase **35.5%** compared to Feb-25

➤ Increase **2.2%** compared to Mar-24

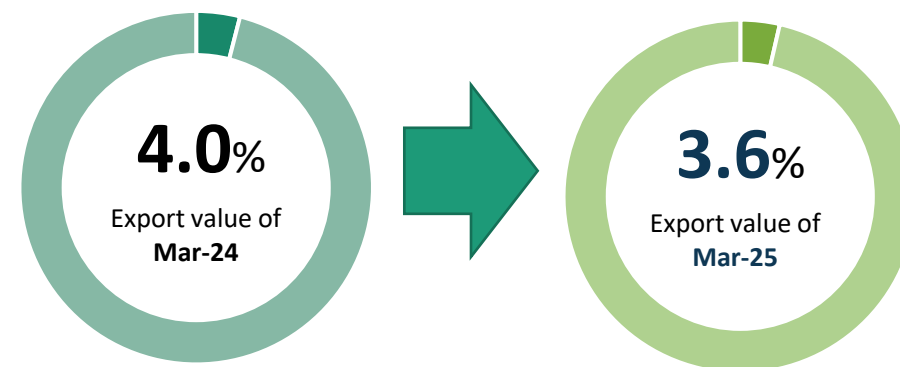
➤ **8.5 mil.USD** more than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **147.5 mil.USD, 27.7%** of total 2024

Percentage of export value to the EU, Mar-2025



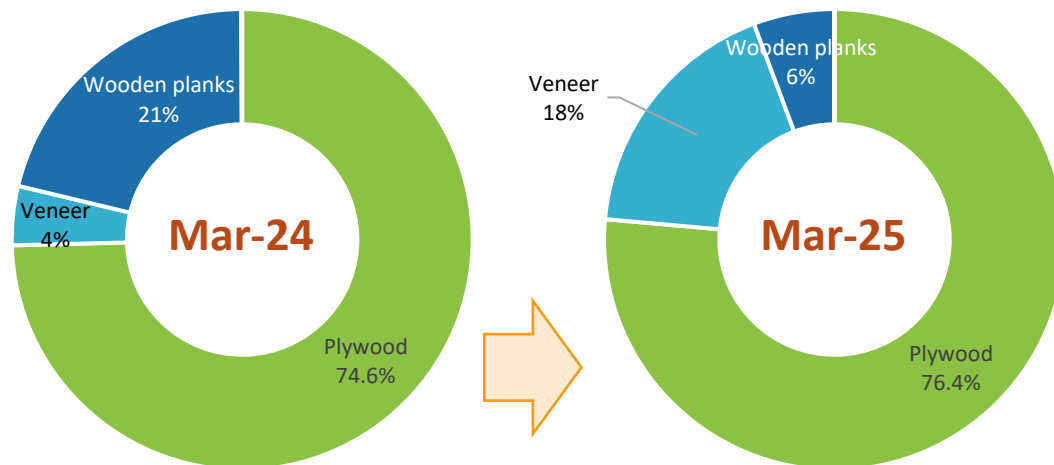
Changes in percentage of export value to the EU, Mar-2025





WOOD AND WOODEN PRODUCTS

Structure of exports by products to the EU, Mar-2025



Export results to the EU, Mar-2025



Plywood

Value: **3.2** mil.USD

Increase **10%** compared to Feb-25

Increase **2.5 times** compared to Mar-24



Wooden planks

Value: **243.9** thousand USD

Increase **20%** compared to Feb-25

Decrease **35%** compared to Mar-24



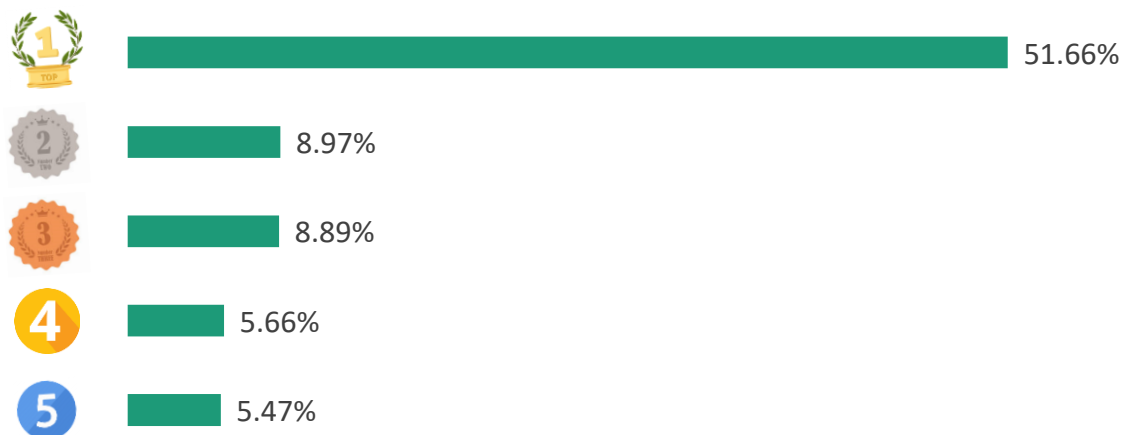
Veneer

Value: **300.4** thousand USD

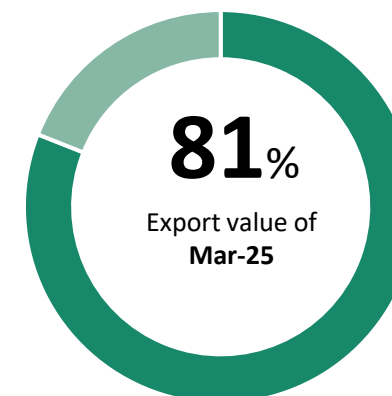
Increase **2.5 times** compared to Feb-25

Increase **10.5 times** compared to Mar-24

TOP 5 export enterprises by value to the EU, Mar-2025



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





SPOTLIGHTS

The U.S. government has imposed a 25% tariff on aluminum and steel imports from the EU, prompting the EU to consider retaliatory measures on a range of U.S. wood products. Initially, the EU proposed tariffs on a broad list of timber items, but following consultations, the list was narrowed down and represents only around 10% of total U.S. hardwood exports to the EU.

The targeted products include lumber, wood panels, plywood, and wooden moldings. Meanwhile, high-value items such as oak and other premium hardwoods have been excluded from the list. The retaliatory tariff rate imposed by the EU is 25%, whereas the U.S. currently applies a 20% tariff on wood products from the EU.

However, if negotiations fail to meet an agreement, further categories such as furniture and deeply processed wood products from both sides may remain subject to elevated tariffs. The new tariff measures are scheduled to take effect on July 16, 2025.





FRUITS AND VEGETABLES (EXPORT)

Export volume and value to the EU, Mar-2025



Export results to the EU, Mar-2025



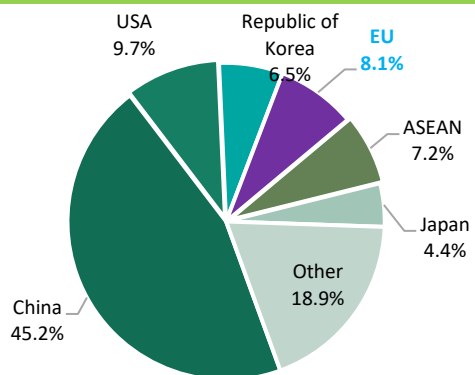
Increase **63.4%** compared to Feb-25

Increase **29.4%** compared to Mar-24

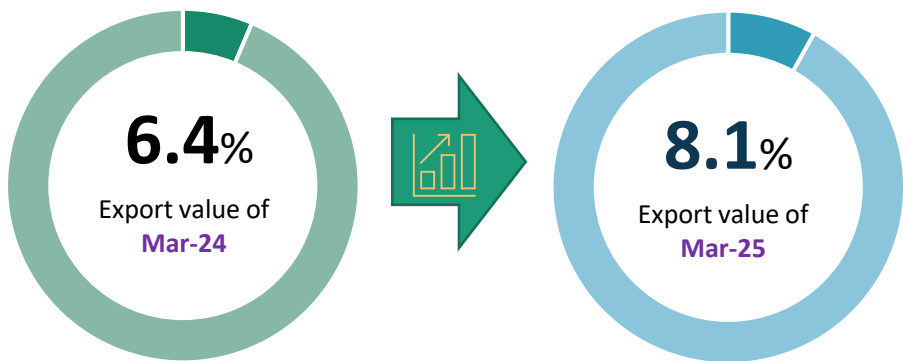
12.4 mil.USD more than compared to monthly average rate in 2024

Accumulated 3 months of 2025 reaches **91.1 mil.USD**, **28.8%** of total 2024

Percentage of export value to the EU, Mar-2025



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

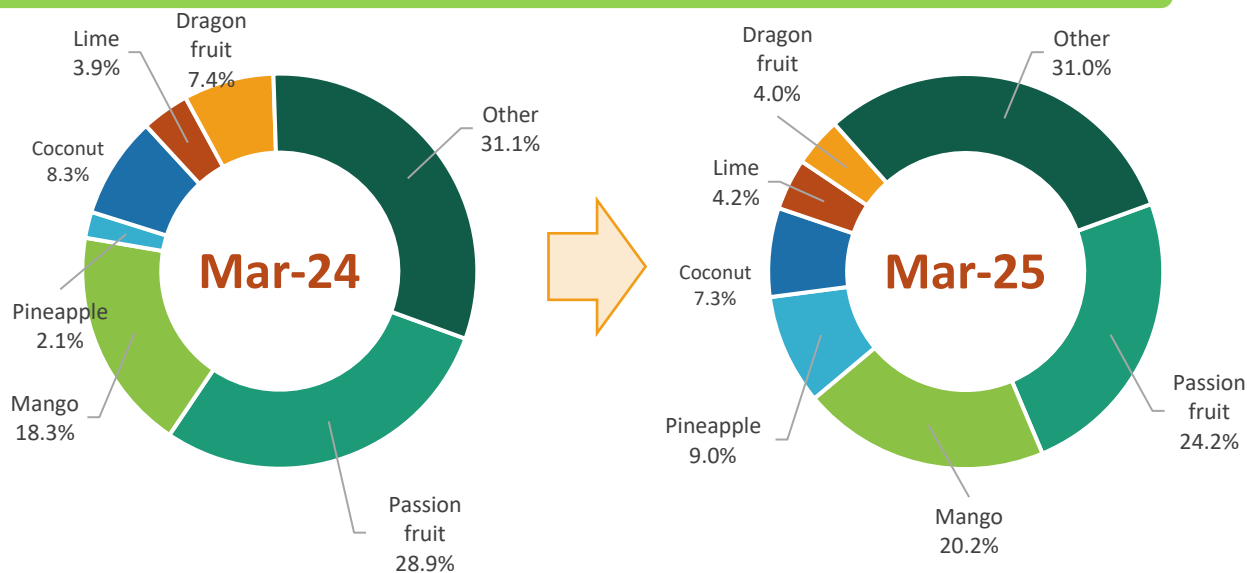


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the EU, Mar-2025



Export results of some main products to the EU, Mar-2025



Passion fruit

Value: **9.4** mil.USD

Increase **108.6%** compared to Feb-25

Increase **8.4%** compared to Mar-24



Mango

Value: **7.8** mil.USD

Increase **23.4%** compared to Feb-25

Increase **43.3%** compared to Mar-24



Pineapple

Value: **3.5** mil.USD

Increase **79.5%** compared to Feb-25

Increase **446.3%** compared to Mar-24



Coconut

Value: **2.8** mil.USD

Increase **85.3%** compared to Feb-25

Increase **13.3%** compared to Mar-24



Lime

Value: **1.6** mil.USD

Increase **67.6%** compared to Feb-25

Increase **39.0%** compared to Mar-24



Dragon fruit

Value: **1.6** mil.USD

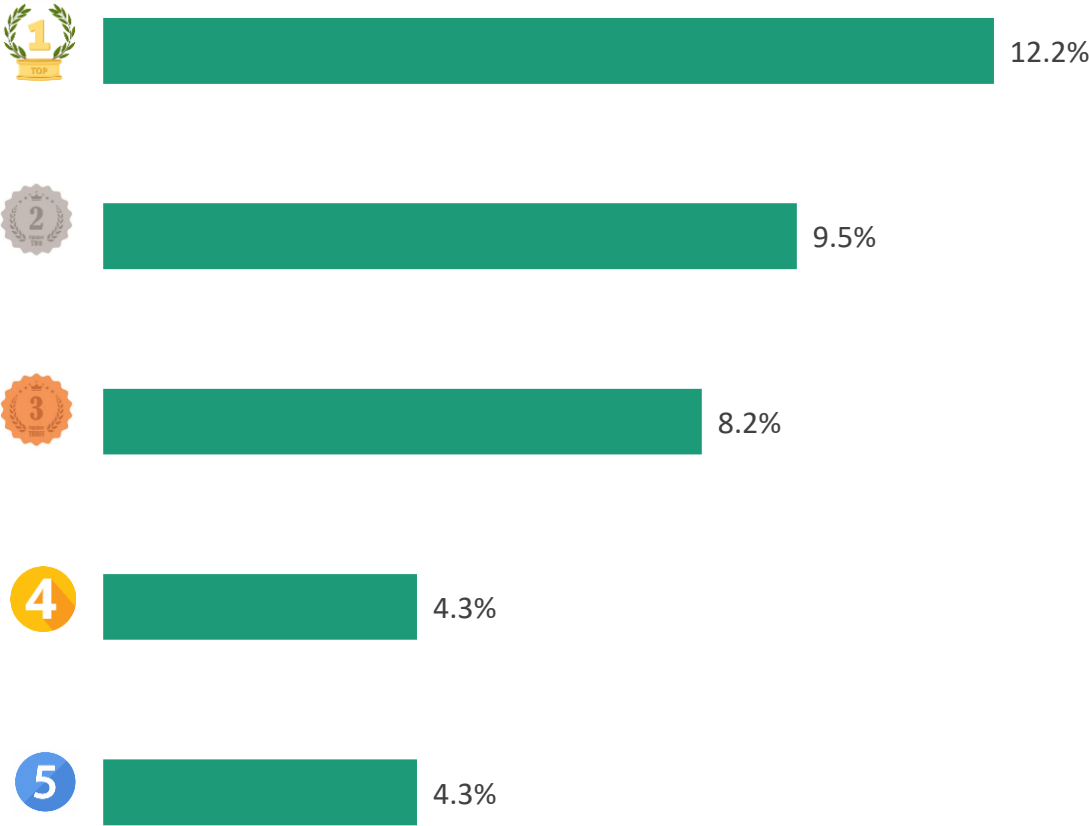
Increase **48.9%** compared to Feb-25

Decrease **29.8%** compared to Mar-24

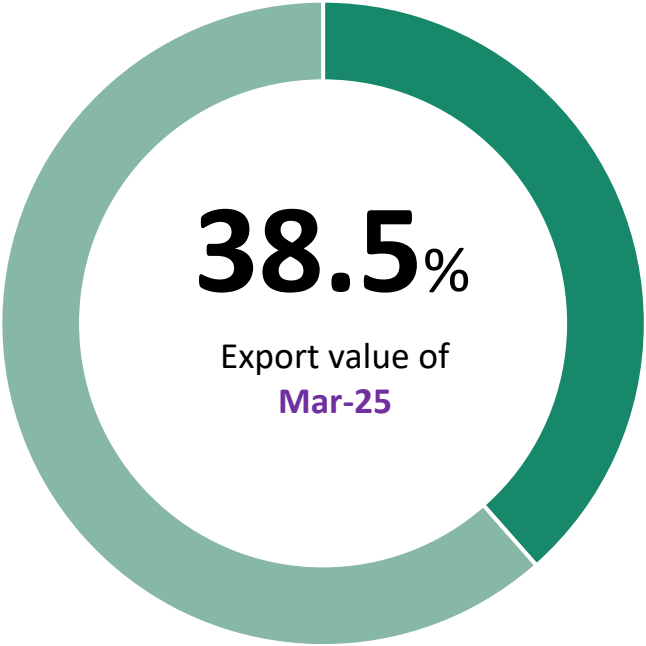


FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to **the EU, Mar-2025**



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



Source: Calculated from data of the General Department of Customs

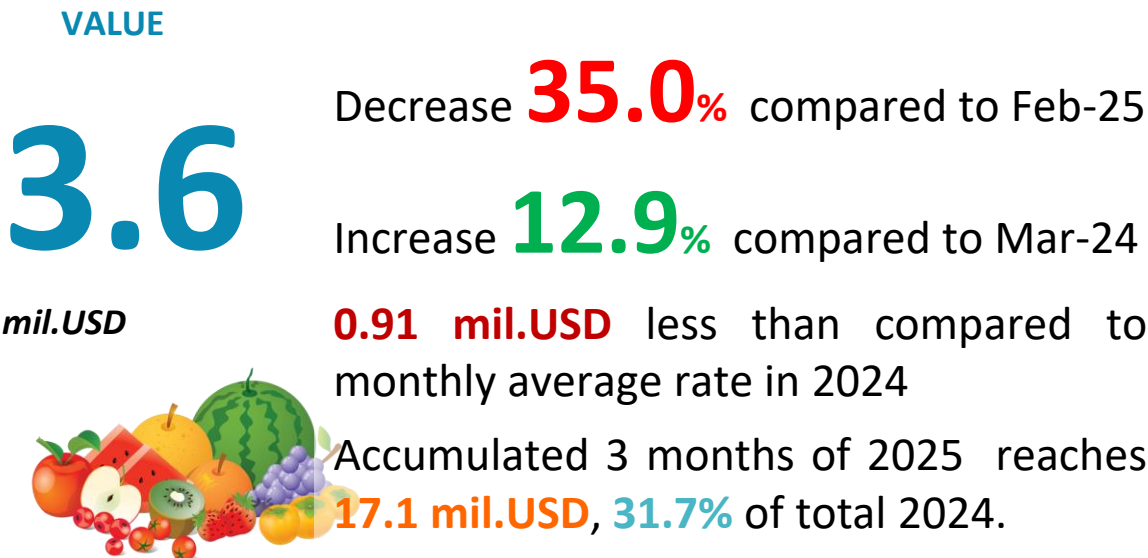


FRUITS AND VEGETABLES (EXPORT)

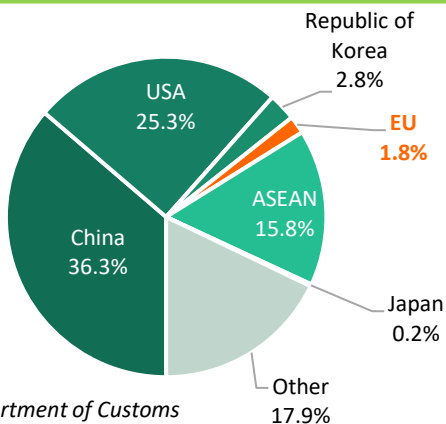
Import volume and value from the EU, Mar-2025



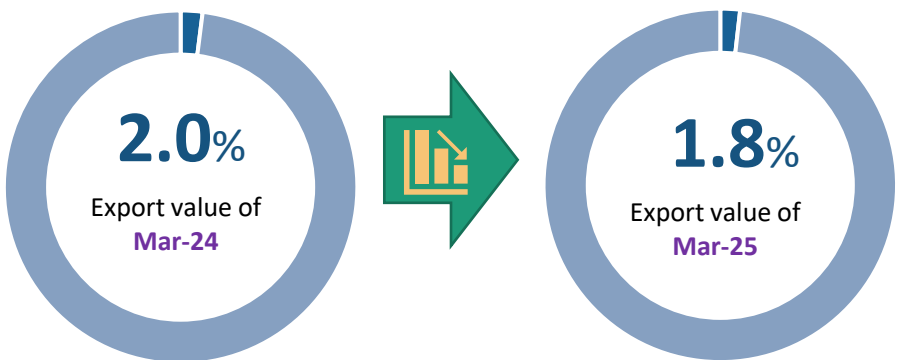
Import results from the EU, Mar-2025



Percentage of import value from the EU, Mar-2025



Changes in percentage of import value from the EU, Mar-2025

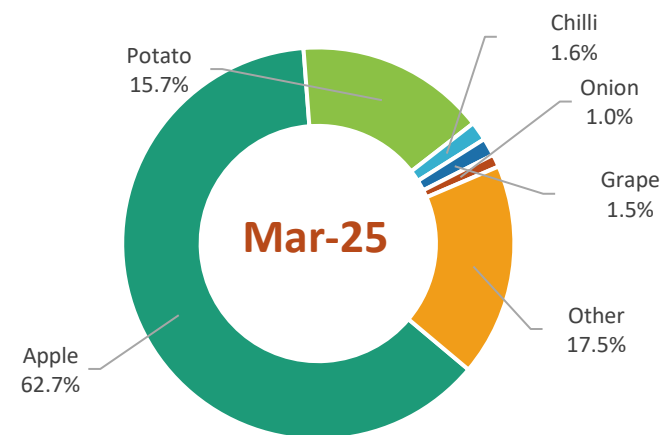
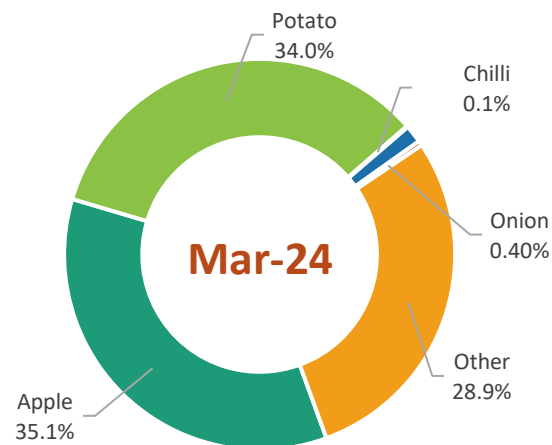


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (EXPORT)

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



Import results of some main products from the EU, Mar-2025



Apple

Value: **2.4** mil.USD

Decrease **25.8%** compared to Feb-25

Increase **101.5%** compared to Mar-24



Potato

Value: **0.6** mil.USD

Decrease **64.4%** compared to Feb-25

Decrease **47.9%** compared to Mar-24



Chilli

Value: **56** thousand USD

Increase **17**times compared to Feb-25

Increase **17**times compared to Mar-24

SPOTLIGHTS

Strong growth in Greece's exports of fruits and vegetables

From September 1, 2024 to April 17, 2025, Greece's exports of various fruits and vegetables recorded a strong growth compared to the same period last year. Specifically, kiwi exports reached 208,679 tons, up 14.2%, surpassing the 200,000-ton milestone for the first time. Apple exports increased 44.7%, tomato exports rose 32.3% to 22,700 tons — mainly to markets such as Bulgaria, Albania, and Romania. Cucumber exports increased by 3% compared to last year. Orange exports reached 268,834 tons (up 4.6%), and mandarin exports climbed 11.9% to 151,621 tons.

Source: Freshplaza.com

Hungary launches frost damage support scheme for fruit orchards

From April 6–9, 2025, Hungary experienced frost events with temperatures dropping below -2°C, severely damaging flowering crops such as apricot, peach, almond, and cherry trees. Hungary has announced a compensation scheme for eligible farmers who report frost-related damages. The deadline for submitting damage reports is May 31.

Climate change is causing the Carpathian Basin to warm rapidly, with milder winters leading to earlier budding and increased vulnerability to frost. Fruit producers need to develop new adaptation strategies, as forecasts suggest that by 2050–2060, yields could decline by 85–90% due to spring frosts.

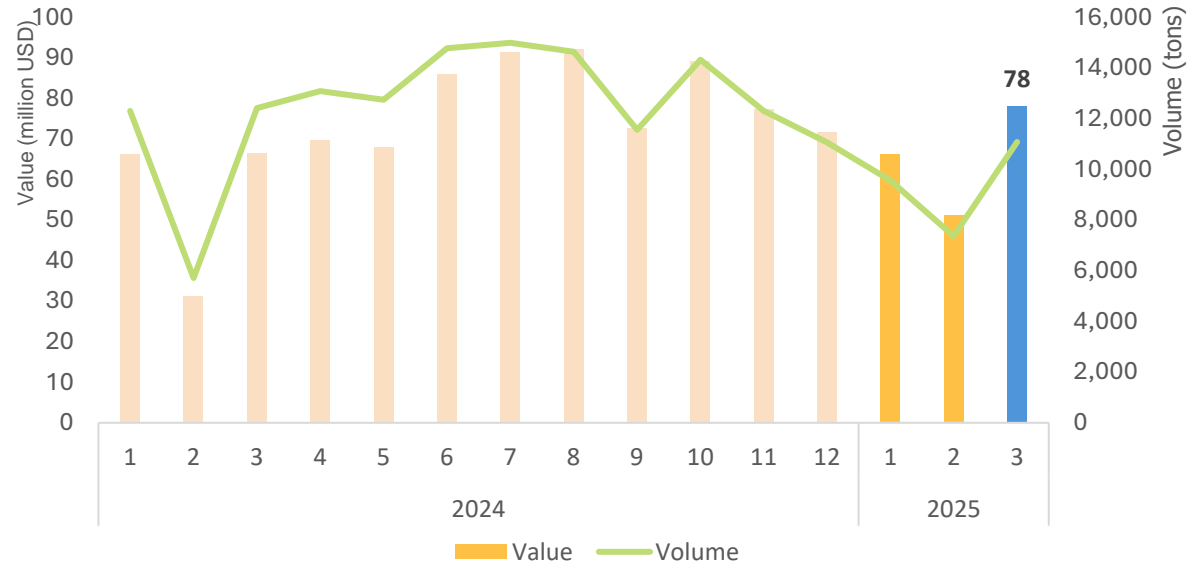
Source: Freshplaza.com





CASHEW NUTS

Export volume and value to the EU, Mar-2025



Export results to the EU, Mar-2025

VALUE

73.47 mil.USD

↗ Increase **29.2%** compared to Feb-25

↗ Increase **17.4%** compared to Mar-24

↑ **4.7** mil.USD more than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **195.6 mil.USD**, **22%** of total 2024

VOLUME

12.5 thousand tons

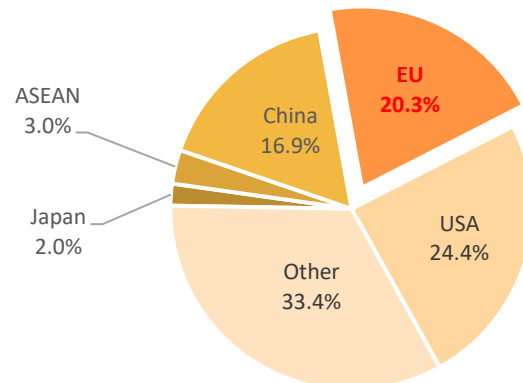
↗ Increase **30.0%** compared to Feb-25

↘ Decrease **10.9%** compared to Mar-24

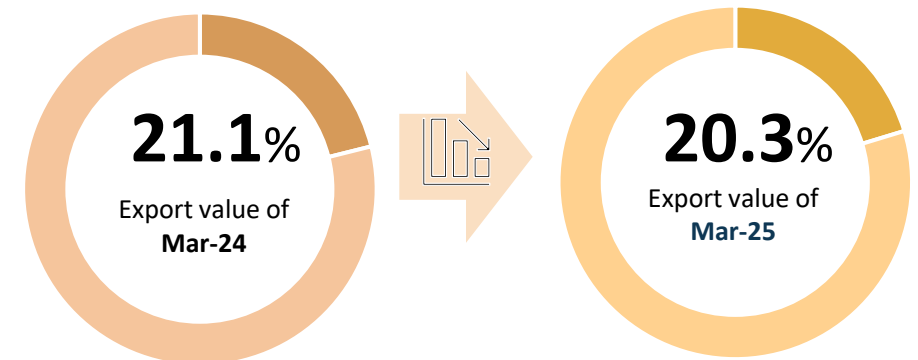
↓ **1.4** thousand tons less than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **28** thousand tons, **19%** of total 2024

Percentage of export value to the EU, Mar-2025



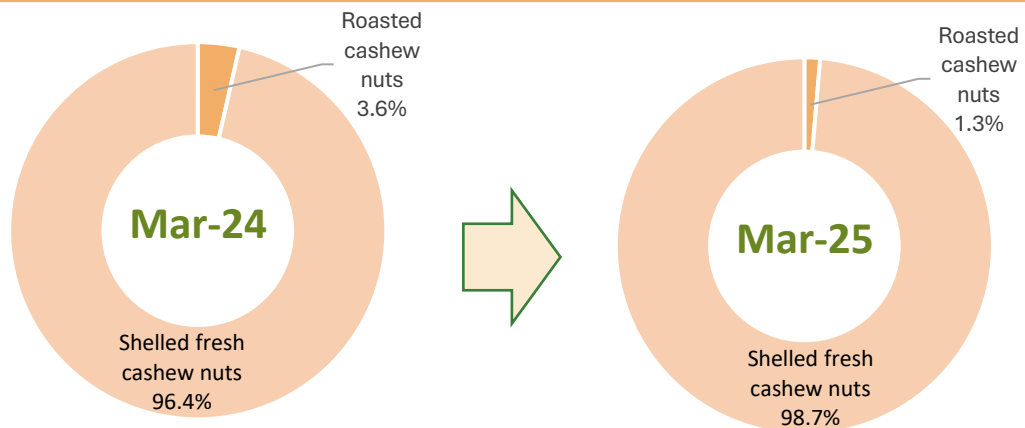
Changes in percentage of export value to the EU, Mar-2025



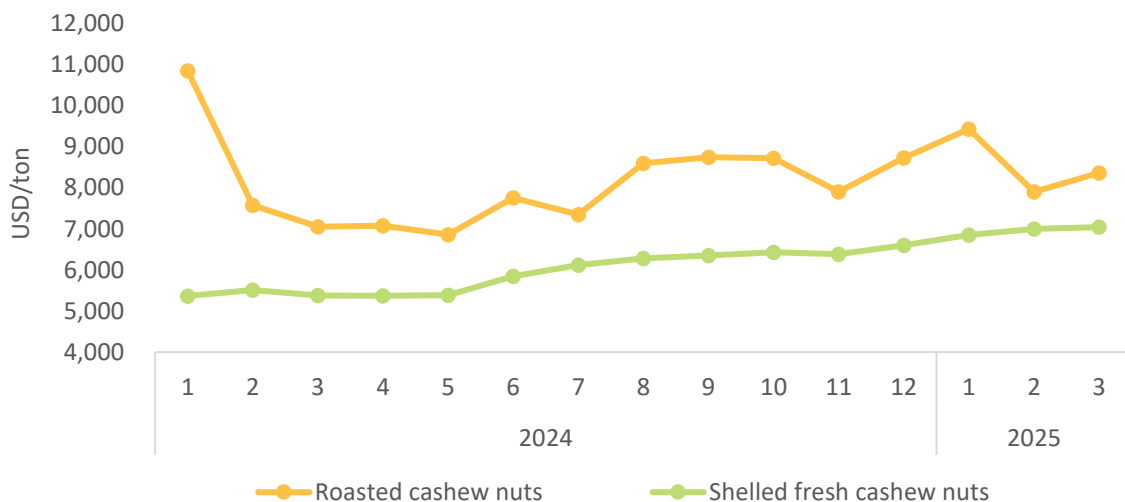


CASHEW NUTS

Structure of exports by products to the EU, Mar-2025



Average export price to the EU, Mar-2025



Export results to the EU, Mar-2025



Shelled fresh cashew nuts

Value: **50.33** mil.USD

Increase **18%** compared to Feb-25

Increase **53%** compared to Mar-24



Roasted cashew nuts

Value: **0.89** mil.USD

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

Increase **20%** compared to Mar-24

Shelled fresh cashew nuts

The average export price in Mar-25 is **7.041** USD/ton; increase **0.6%** compared to the previous month; and increase **31%** compared to the same month of 2024.

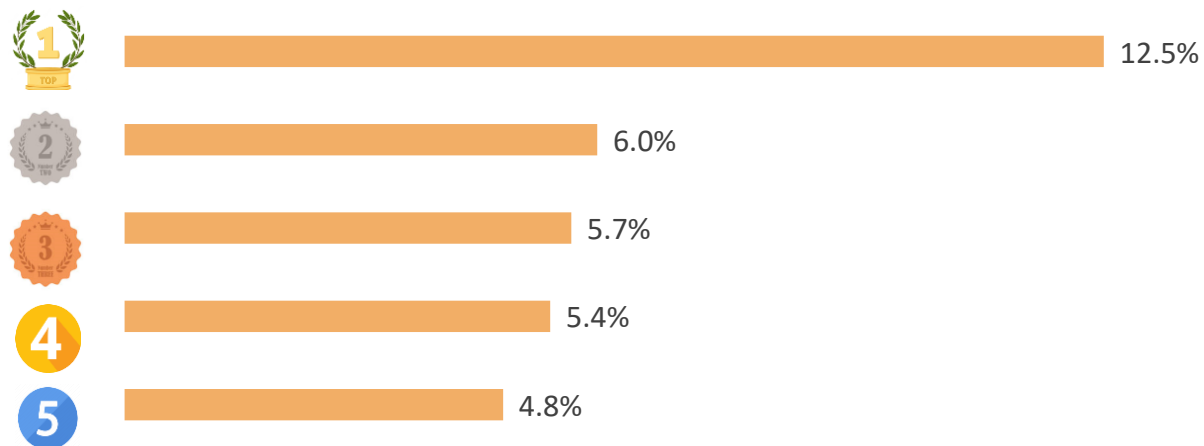
Roasted cashew nuts

The average export price in Mar-25 is **8.362** USD/ton; increase **5.9%** compared to the previous month; and increase **18.6%** compared to the same month of 2024.

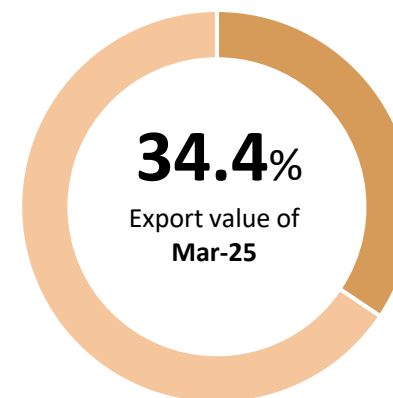


CASHEW NUTS

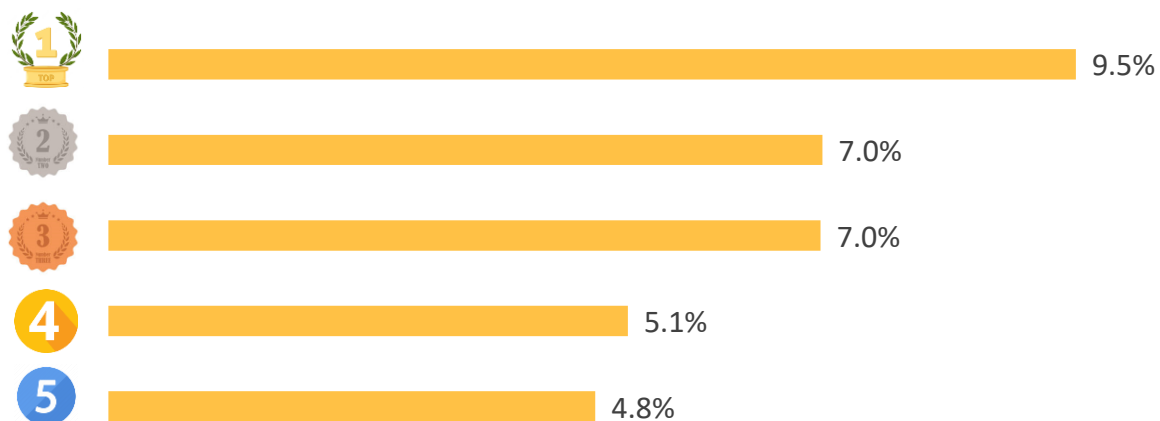
TOP 5 export enterprises by value to the EU, Mar-2025



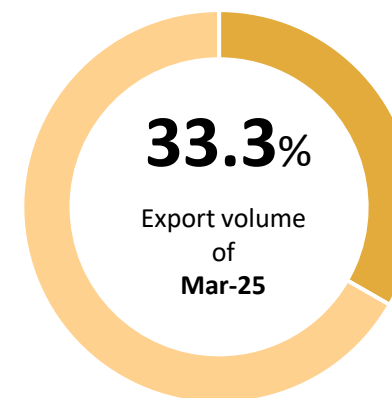
Value ratio of TOP 5 export enterprises to the EU, Mar-2025



TOP 5 export enterprises by volume to the EU, Mar-2025



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



CASHEW NUTS

SPOTLIGHTS

EU cashew imports reached a record high in the first quarter of 2025

In Q1/2025, EU cashew imports reached a record volume of 42,850 tons, valued at 273 million EUR (300 million USD), marking a 16% increase in volume and a 42% rise in value compared to the same period in 2024. Vietnam currently accounts for 72% of the EU's total cashew imports. Vietnam's cashew market share in the EU may increase as Vietnamese cashew producers shift their focus to the EU, Japan, and the Middle East in response to the U.S. imposing tariffs of up to 46% on Vietnamese products.

Ivory Coast remains the second-largest supplier to the EU, with a 43% year-on-year increase, mainly driven by higher volumes. India also increased its shipments by 8%, though growth was limited by high input costs.

Within the EU, Germany is the largest importer, accounting for 33% of total cashew imports, followed by the Netherlands (29%), Spain, and Italy (each accounting for 9%).

Source: mundus-agri.eu





RICE

Export value to the EU, Mar-2025



Export results to the EU, Mar-2025

VALUE

5.5 mil.USD



↗ Increase **35.5%** compared to Feb-25

↗ Increase **0.05%** compared to Mar-24

↓ **1.1 mil.USD** less than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **15** mil.USD, **18.9%** of total 2024

VOLUME

6.8 thousand tons



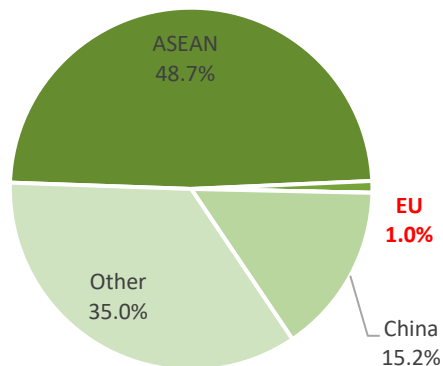
↗ Increase **42.5%** compared to Feb-25

↗ Increase **6.5%** compared to Mar-24

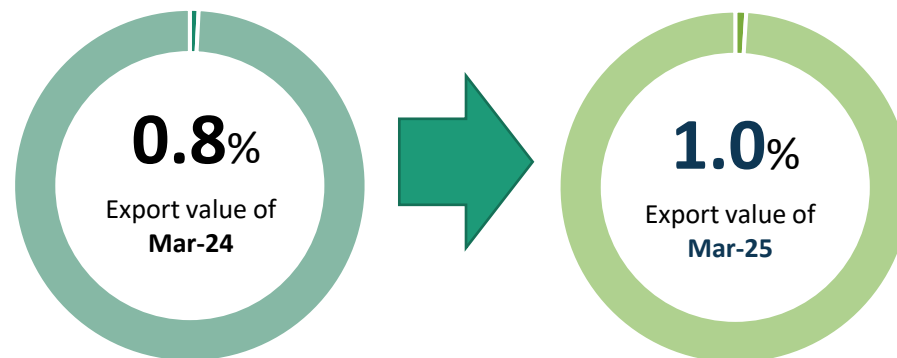
↓ **1.145 tons** less than compared to monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **18** thousand tons, **18.8%** of total 2024

Percentage of export value to the EU, Mar-2025



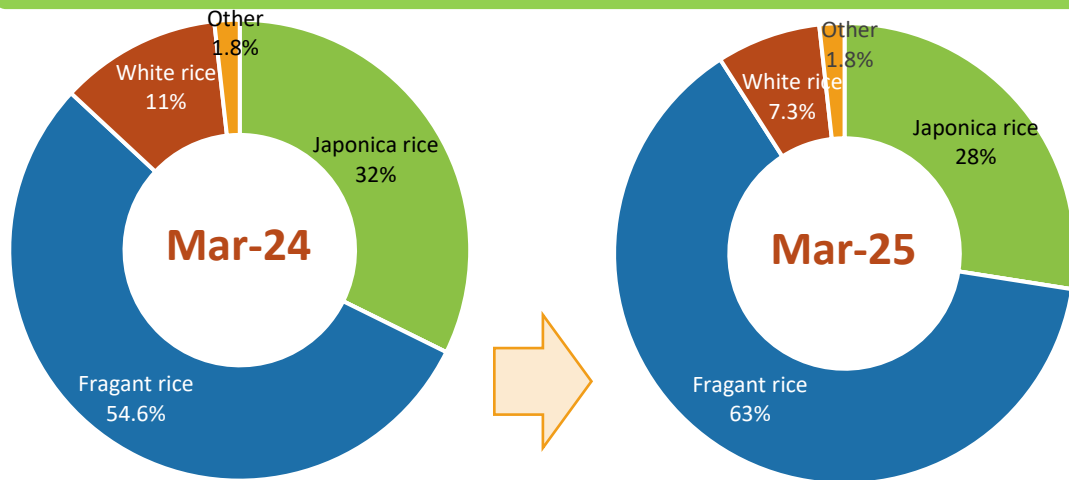
Changes in percentage of export value to the EU, Mar-2025



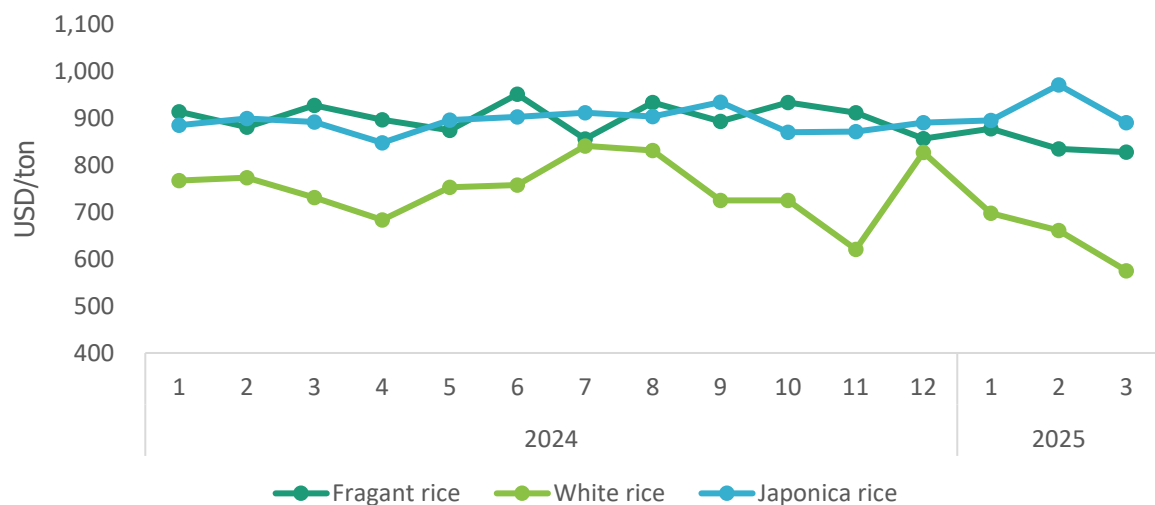


RICE

Structure of exports by products to the EU, Mar-2025



TOP 5 export enterprises by value to the EU, Mar-2025



Export results to the EU, Mar-2025



Fragrant rice

Value: **3.5** mil.USD

Increase **28%** compared to Feb-25

Increase **16%** compared to Mar-24



Japonica rice

Value: **1.5** mil.USD

Increase **38%** compared to Feb-25

Decrease **15%** compared to Mar-24



White rice

Value: **0.4** mil.USD

Increase **82%** compared to Feb-25

Decrease **35%** compared to Mar-24

Japonica rice

The average export price in Mar-25 is **891 USD/ton**; **decrease 8%** compared to the previous month; and **decrease 0.2%** compared to the same month 2024.

Fragrant rice

The average export price in Mar-25 is **828 USD/ton**; **decrease 1%** compared to the previous month; and **decrease 11%** compared to the same month 2024.

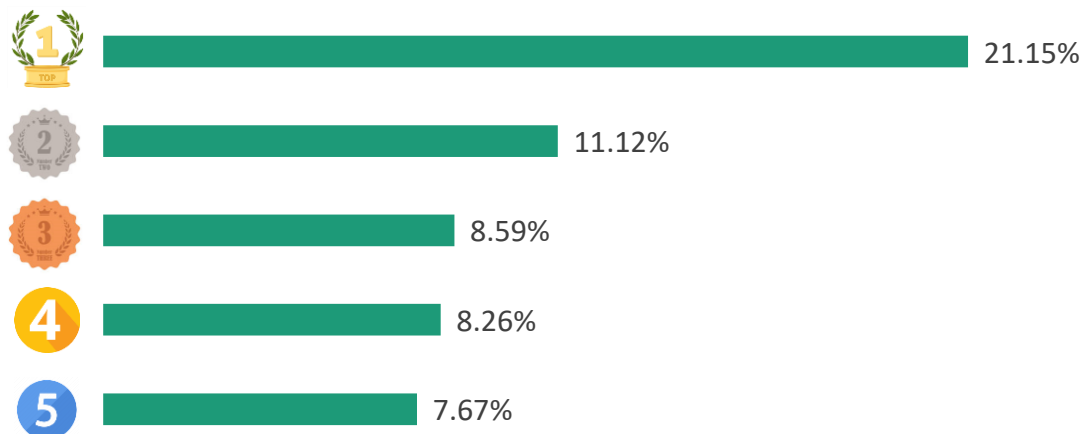
White rice

The average export price in Mar-25 is **576 USD/ton**; **decrease 13%** compared to the previous month; and **decrease 21%** compared to the same month 2024.

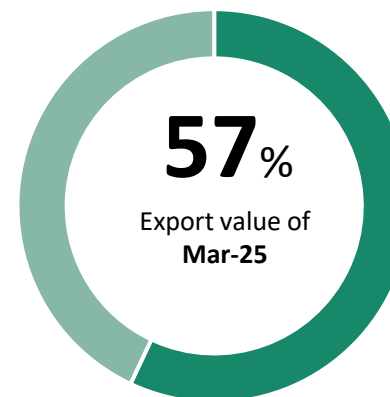


RICE

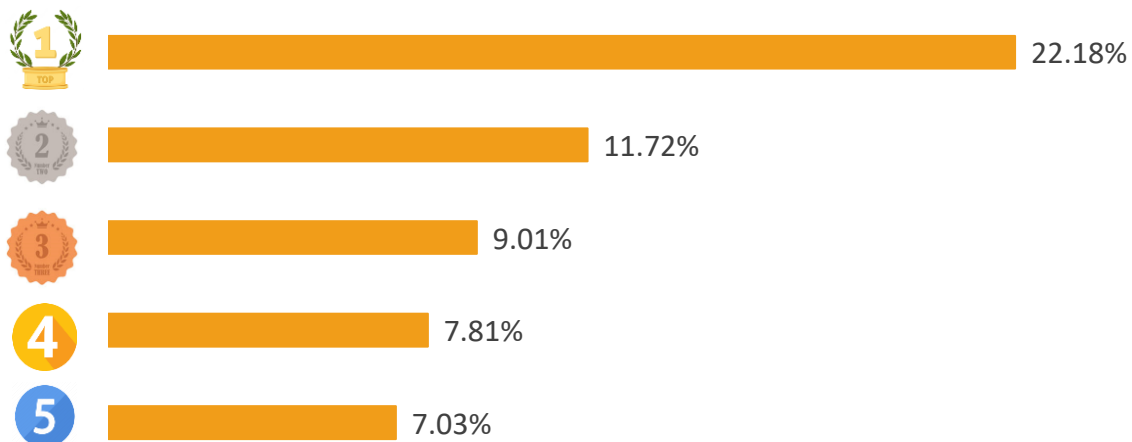
TOP 5 export enterprises by value to the EU, Mar-2025



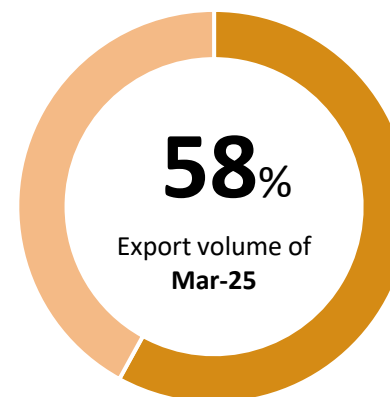
Value ratio of TOP 5 export enterprises to the EU, Mar-2025



TOP 5 export enterprises by volume to the EU, Mar-2025



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





For feedback, please send to:

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