

Volume 5/2025



ISPAE

MONTHLY REPORT ON AGRI-PRODUCT EXPORT

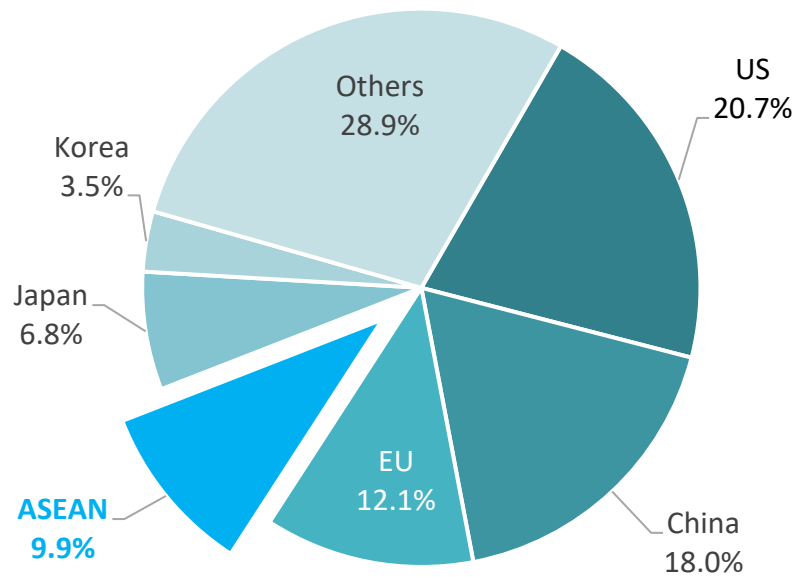
FROM VIETNAM TO **ASEAN**

Prepared by: **AGREiNFOS**



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

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

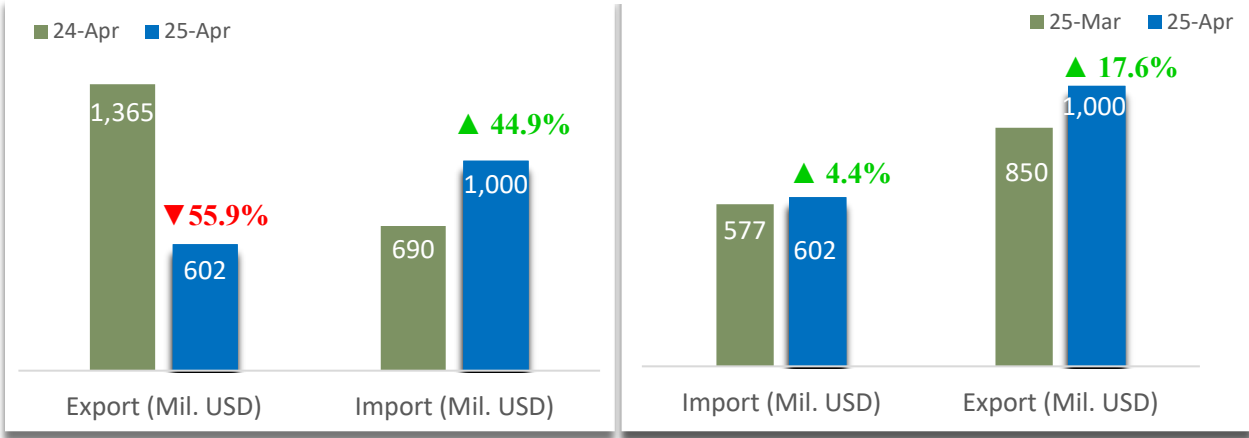


Changes in export proportion of AFF product to the ASEAN
Apr-2025 compared to Mar-25 and Apr-24

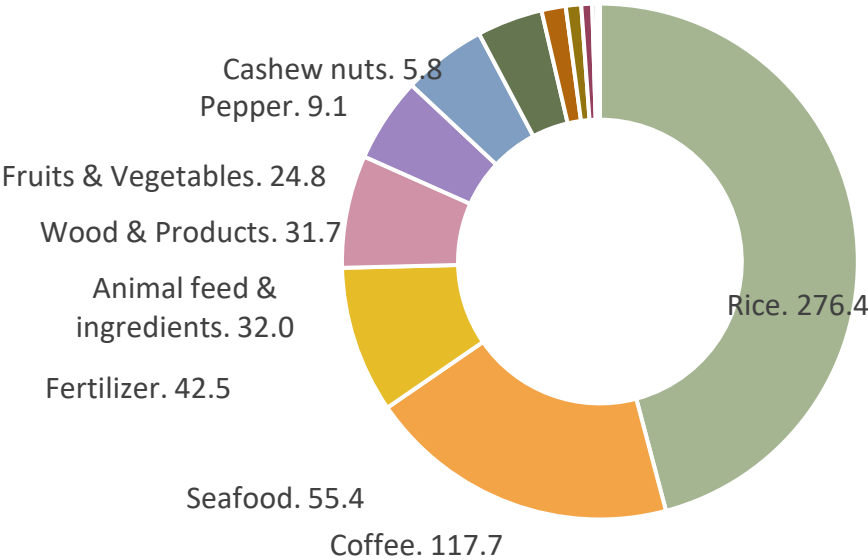
	Export value (Mil. USD)	Compared to Mar-25	Compared to Apr-24
US	1.254	▼ 0.5%	▼ 1.3%
China	1.091	▲ 1.1%	▼ 2.0%
EU	736	▼ 0.6%	▲ 2.8%
ASEAN	602	▲ 0.4%	▼ 3.2%
Japan	415	▼ 0.4%	▲ 0.6%
Korea	212	▲ 0.005%	▼ 0.4%
Total export	6.062		

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

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



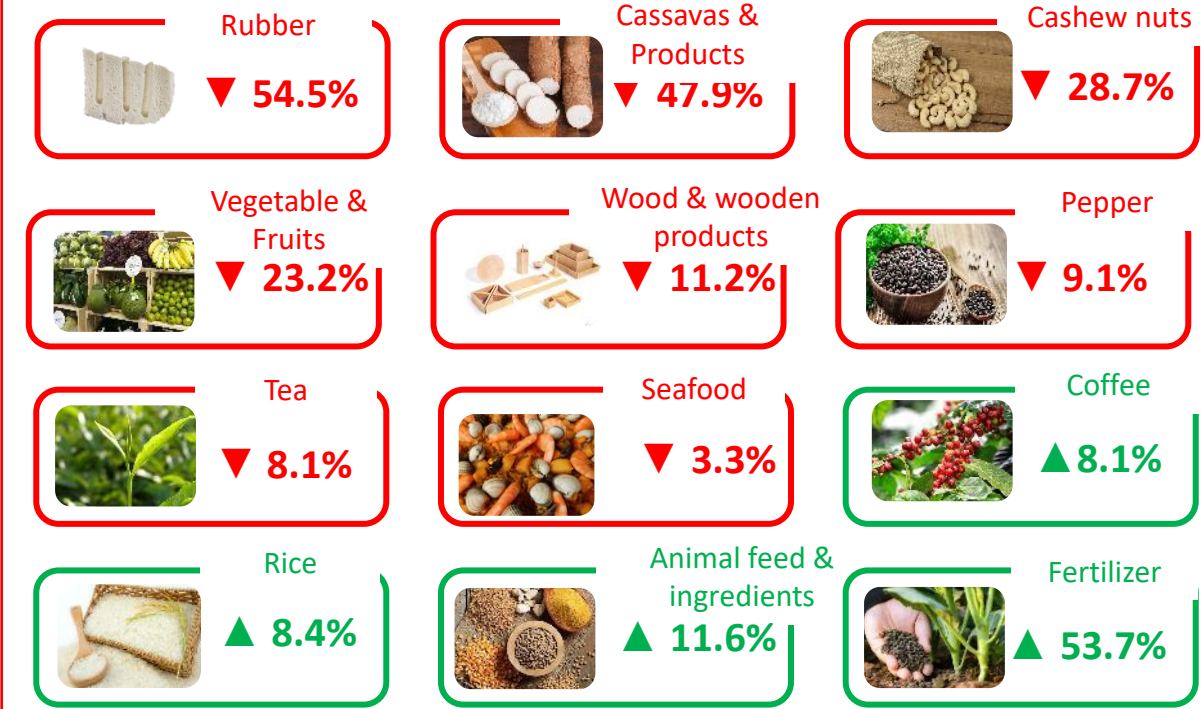
Key AFF product export value to ASEAN, April 2025



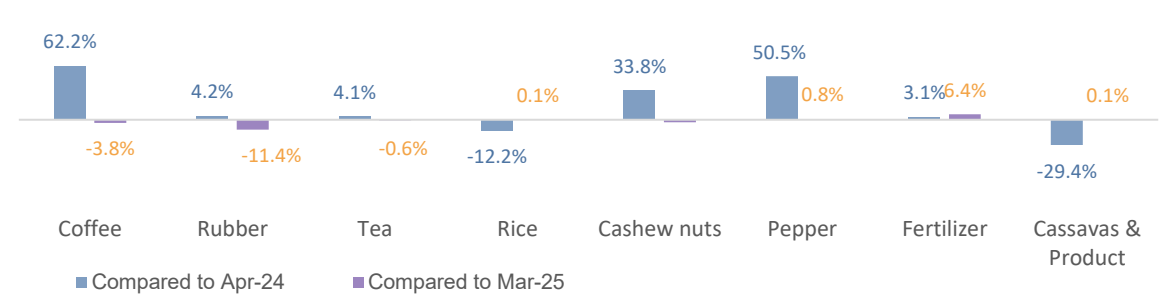
Source: Calculated from data of the General Department of Customs

Unit: Mil. USD

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

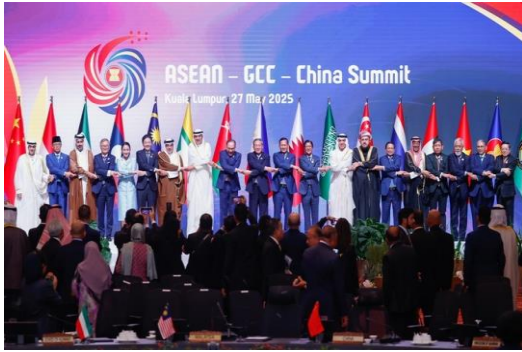


Changes in average export value of key AFF products
to ASEAN in Mar-25 compared to Mar-24 and compared to Feb-25



TIN NỔI BẬT

There is still significant potential for cooperation with ASEAN and the GCC.



There is significant potential for cooperation with ASEAN and the GCC.

At the ASEAN-GCC-China Economic Forum, Chinese Premier Li Qiang emphasized that China, ASEAN, and the Gulf Cooperation Council (GCC) should take the lead in key areas such as high-tech industries, supply chain security, and innovation promotion. He noted that the economic output of the three parties accounts for approximately 25% of global GDP but their trade volume represents only 5.4% of global trade—indicating substantial untapped potential for cooperation.



The Premier called on all parties to open markets, oppose protectionism and unilateralism, and strengthen collaboration to leverage their complementary strengths. He also reaffirmed China's commitment to maintaining proactive fiscal policies, flexible monetary measures, and accelerating industrial transformation toward green, smart, and high-end development.

Source: aseanvietnam.vn

ADB Commits to Support Southeast Asia

The Asian Development Bank (ADB) committed to provide approximately USD 24 billion over the next three years to promote regional cooperation and integration in Southeast Asia. The focus will be on key areas such as infrastructure connectivity, support for private sector-led growth, energy integration, and food security enhancement. Additionally, ADB plans to increase total financing to USD 40 billion by 2030 to address vulnerabilities within the regional food systems. Under the BIMP-EAGA framework, ADB has made substantial investments in agricultural development, sustainable aquaculture, and marine plastic waste management. Furthermore, the bank aims to raise annual private sector financing to USD 13 billion and double its trade and supply chain financing to USD 2.5 billion per year by 2030.

Source: aseanvietnam.vn



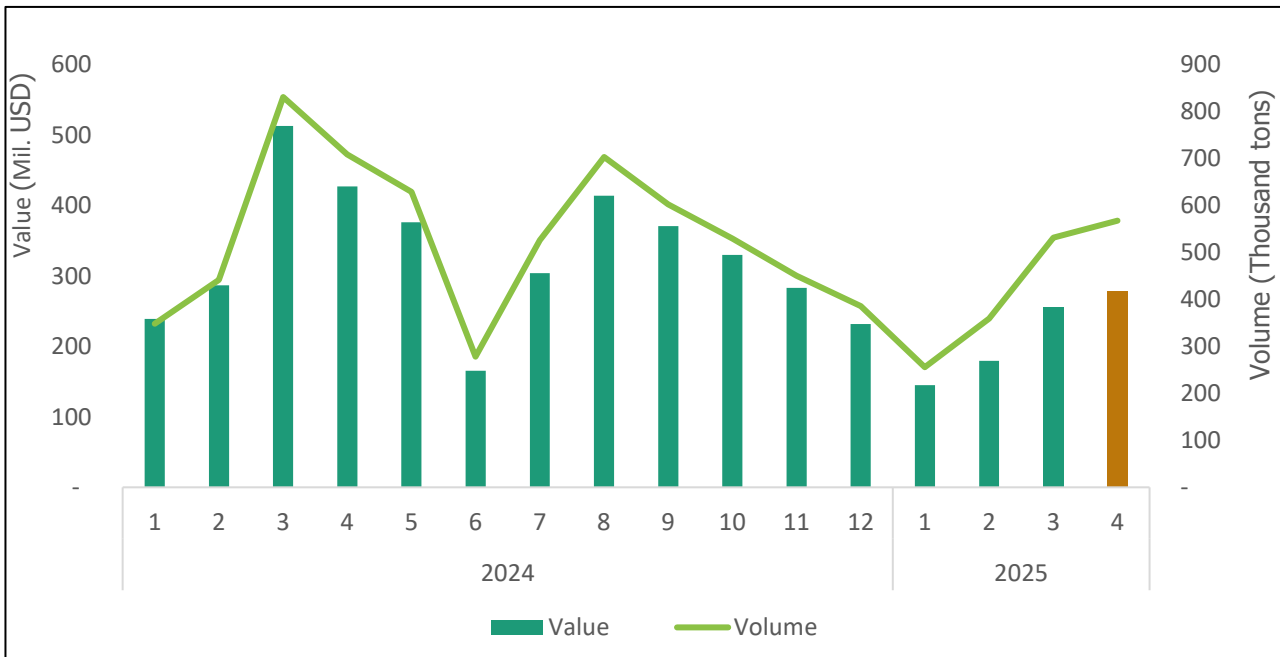
ADB Commits to Support Southeast Asia





RICE

Export volume and value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025

VALUE

277.8 Mil. USD

↗ Increase **8.7%** compared to Mar-25

↘ Decrease **35.0%** compared to Apr-24

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

◇ Accumulated 4 month of 2025 reaches **857.6 Mil.USD.** and the rate is **21.8%** of the total in 2024.

VOLUME

567.5 Thousand tons

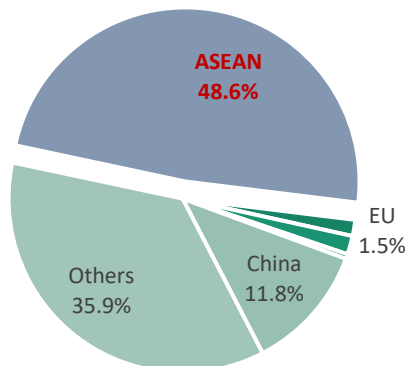
↗ Increase **6.8%** compared to Mar-25

↘ Decrease **19.9%** compared to Apr-24

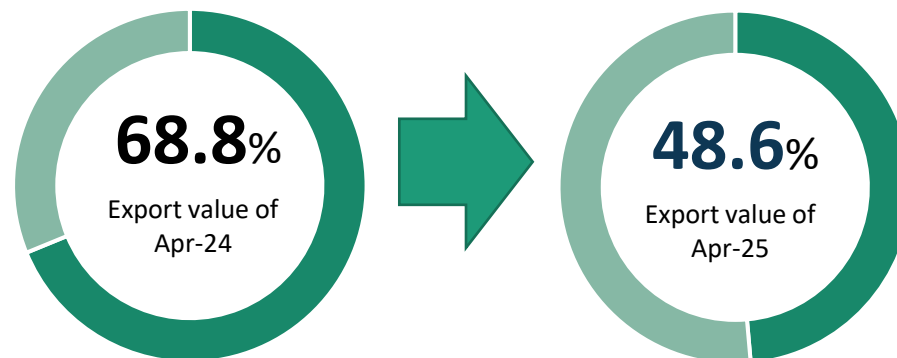
↗ **31.5 thousand tons** more than the monthly average rate in 2024.

◇ Accumulated 4 month of 2025 reaches **1.71 Bil. Tons,** and the rate is **26.6%** of the total in 2024.

Percentage of export value to ASEAN, Apr-2025



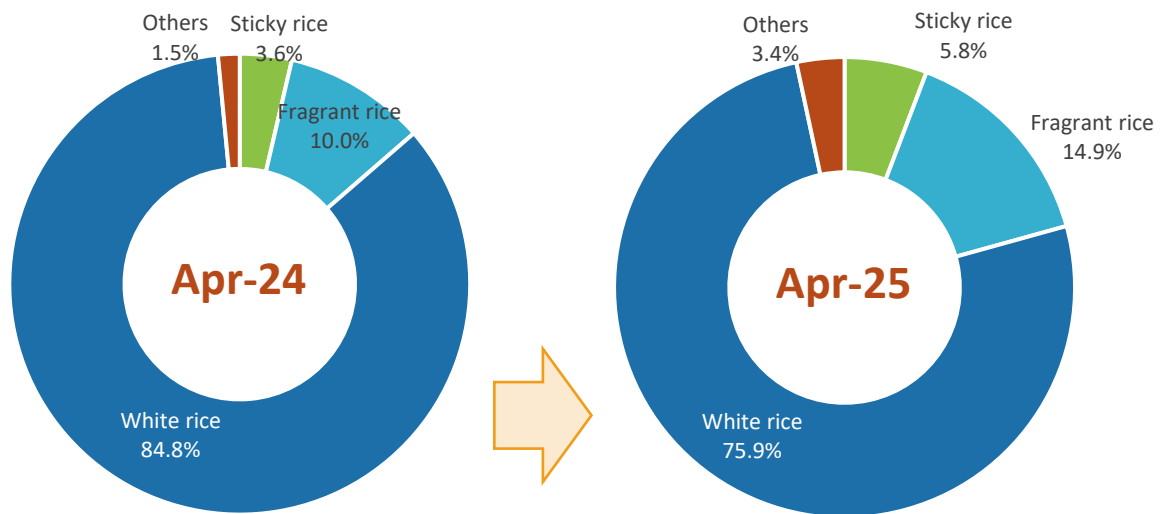
Changes in the percentage of export value to ASEAN, Apr-2025



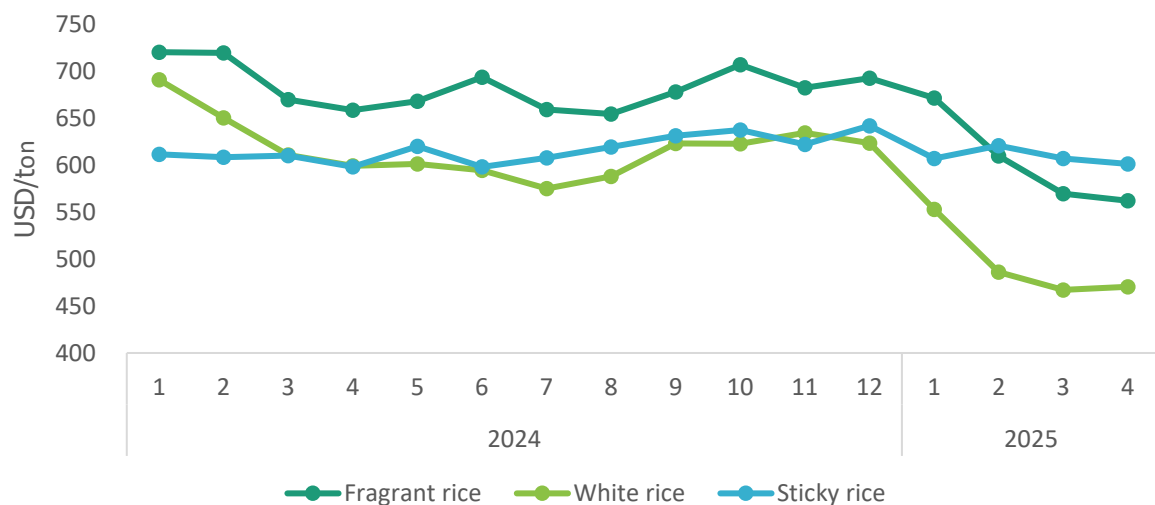
RICE



Structure of exports by products to ASEAN, Apr-2025



Average export price to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025



White rice

Value: **211.0** Mil. USD

Increase **4%** compared to Mar-25

Decrease **42%** compared to Apr-24



Fragrant rice

Value: **41.4** Mil. USD

Increase **26%** compared to Mar-25

Decrease **3%** compared to Apr-24



Sticky rice

Value: **16.1** Mil. USD

Increase **11%** compared to Mar-25

Increase **3%** compared to Apr-24

Sticky rice

The average export price in Apr-25 is **601** USD/ton; **Decrease 1%** compared to the previous month; and **increase 1%** compared to the same month in 2024.

Fragrant rice

The average export price in Apr-25 is **562** USD/ton; **decrease 1%** compared to the previous month; and **decrease 15%** compared to the same month in 2024.

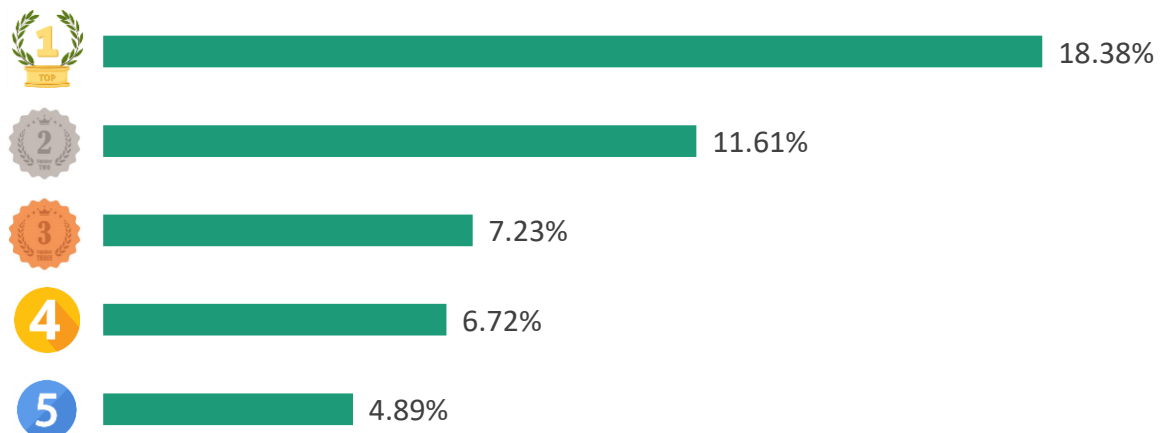
White rice

The average export price in Apr-25 is **471** USD/ton; **increase 1%** compared to the previous month; and **decrease 22%** compared to the same month in 2024.

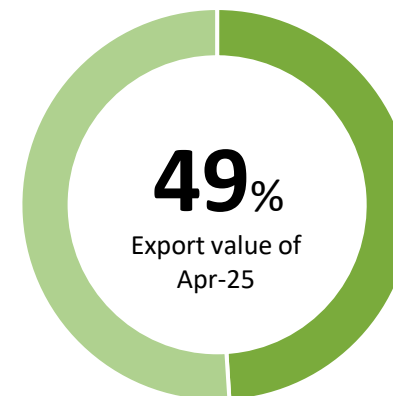


RICE

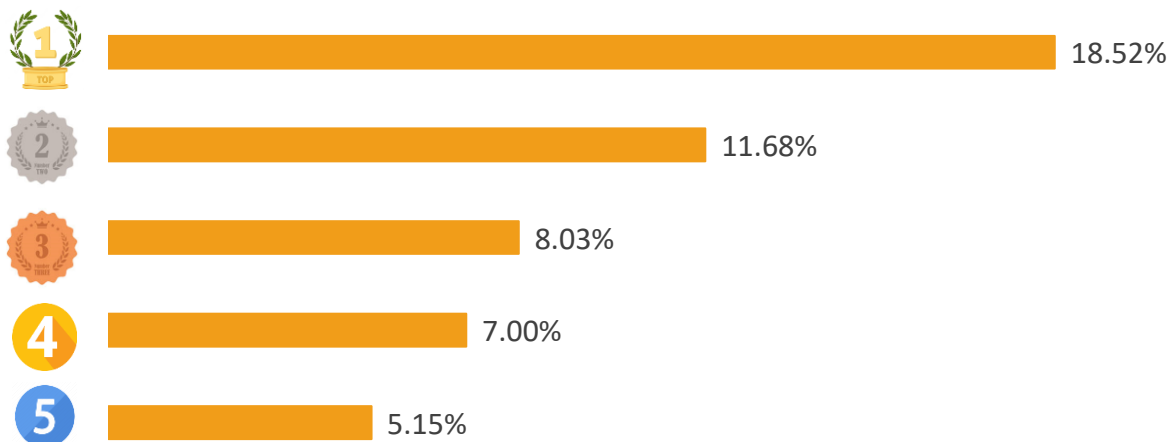
Top 5 export enterprises by value to ASEAN, Apr-2025



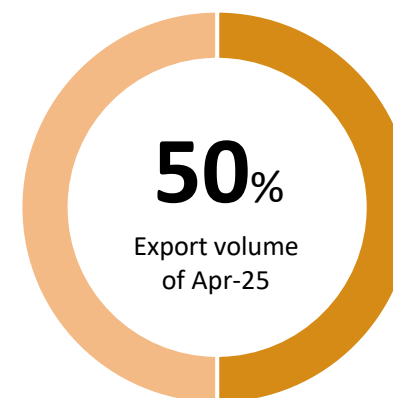
Value ratio of Top 5 export enterprise to ASEAN, Apr-2025



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



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





RICE

SPOTLIGHT

01

Indonesian President – Mr. Prabowo Subianto stated that the country's rice production has exceeded domestic consumption, eliminating the necessity to import rice from Cambodia. According to President Prabowo, South Sumatra Province is projected to produce 4 million tons of rice this year, representing a 25% increase from the previous average of 3 million tons. This is the clear evidence of Indonesia's successful response to the global food crisis. He also highlighted the country's record-high rice reserves and the effective coordination between central and local authorities in addressing extreme climate phenomena such as El Niño and La Niña. Indonesia has effectively utilized water resources from major rivers and deployed tens of thousands of water pumps to mitigate the effects of drought. These efforts have played a crucial role in strengthening national food security.

Source: en.antaranews.com

02

Philippine Agriculture Secretary – Mr. Francisco Tiu Laurel stated that the government will maintain the current rice import tariff rate of 15% in the near future, while engaging in consultations with economic policymakers regarding the potential for future adjustments. He emphasized that an immediate increase in tariffs is not appropriate at this time, as the domestic harvest season has concluded, and any changes must be carefully coordinated with key officials to ensure market stability. According to Secretary Laurel, a gradual increase in import tariffs is under consideration as a strategy to stabilize domestic rice prices and support local farmers facing competitive pressure from imported rice. However, no specific figures have been disclosed regarding the potential tariff hike should the proposal be approved.

Source: manilastandard.net





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Apr-25



Export results to the ASEAN, Apr-25

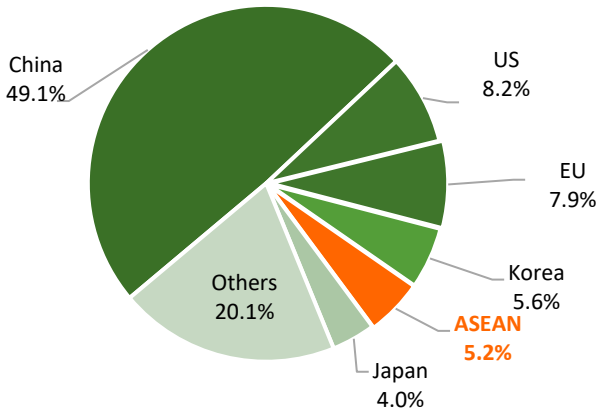
VALUE
27.2
Mil. USD

Decrease **20.9%** compared to Mar-25

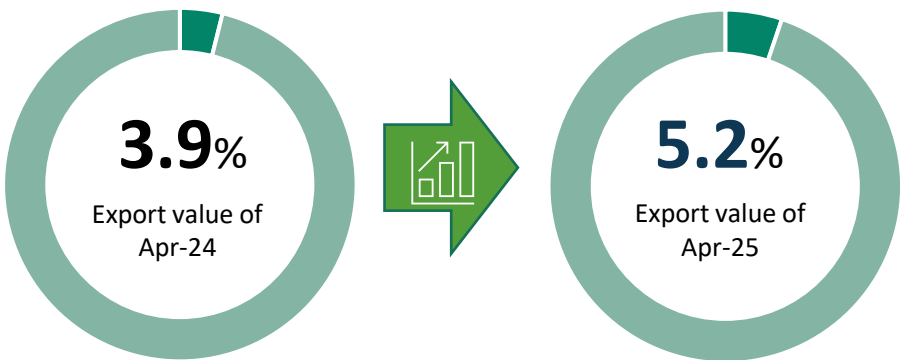
Increase **15.8%** compared to Apr-24
9.2 Mil. USD less than the monthly average rate in 2024.

Accumulated 4 month of 2025 reaches **124.3 Mil. USD**, and the rate is **28.5%** of the total in 2024.

Percentage of export value to the ASEAN, Apr-25



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

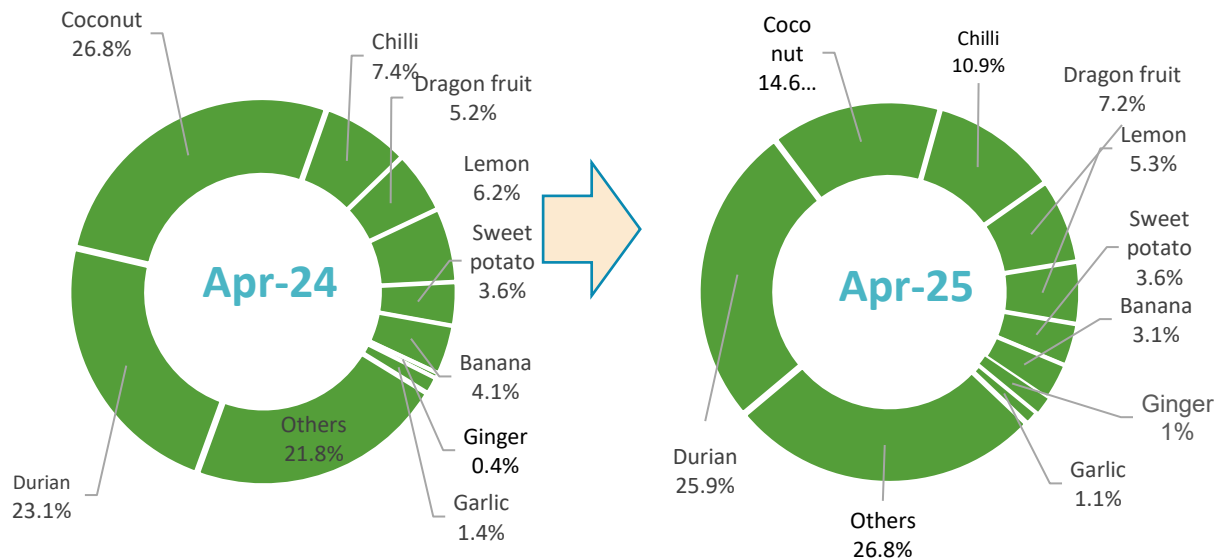


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (EXPORT)

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



Export results to the ASEAN, Apr-25



Durian

Value: **5.0** Mil. USD

Decrease **44.2%** compared to Mar-25

Increase **12.5%** compared to Apr-24



Chilli

Value: **3.7** Mil. USD

Decrease **2.9%** compared to Mar-25

Increase **128.4%** compared to Apr-24



Coconut

Value: **2.9** Mil. USD

Decrease **41.2%** compared to Mar-25

Decrease **47.0%** compared to Apr-24



Dragon fruit

Value: **2.0** Mil. USD

Decrease **17.5%** compared to Mar-25

Increase **12.0%** so compared to Apr-24



Sweet potato

Value: **1.5** Mil. USD

Increase **20.7%** compared to Mar-25

Increase **52.0%** compared to Apr-24



Lemon

Value: **1.2** Mil. USD

Decrease **32.8%** compared to Mar-25

Decrease **29.4%** compared to Apr-24



Banana

Value: **1.2** Mil. USD

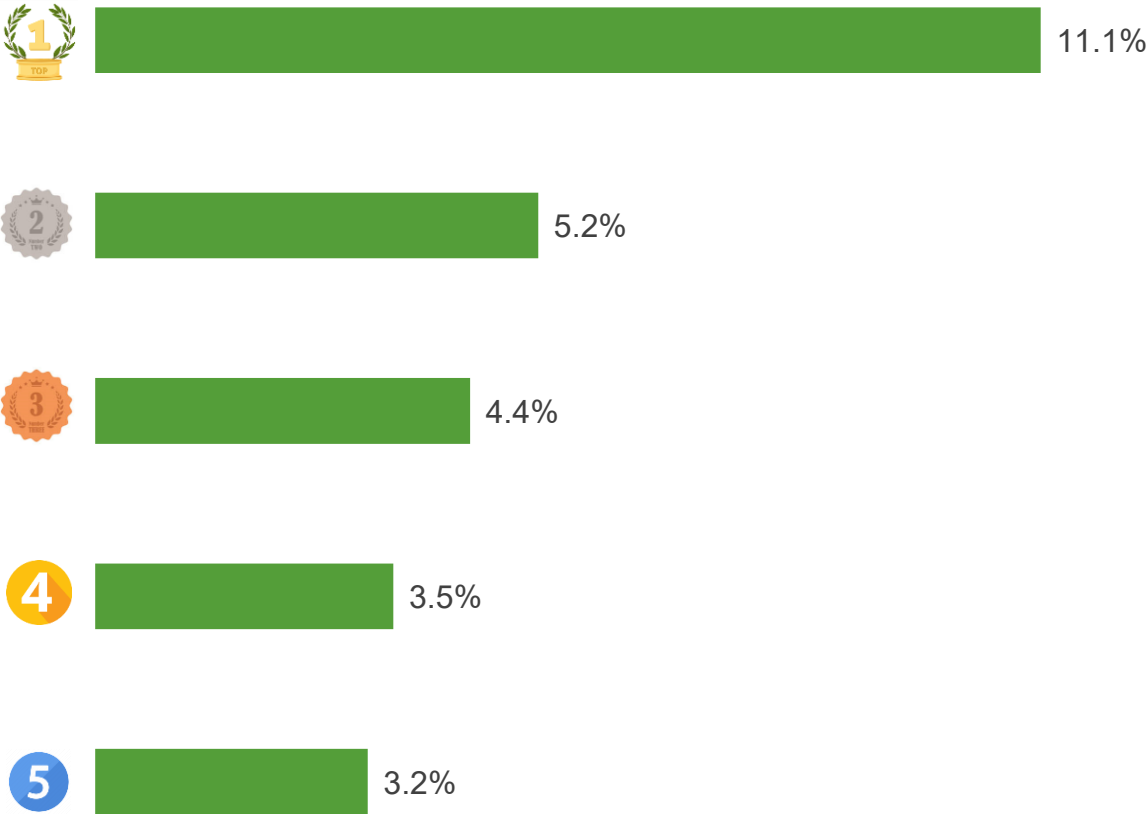
Increase **12.4%** compared to Mar-25

Increase **16.1%** compared to Apr-24

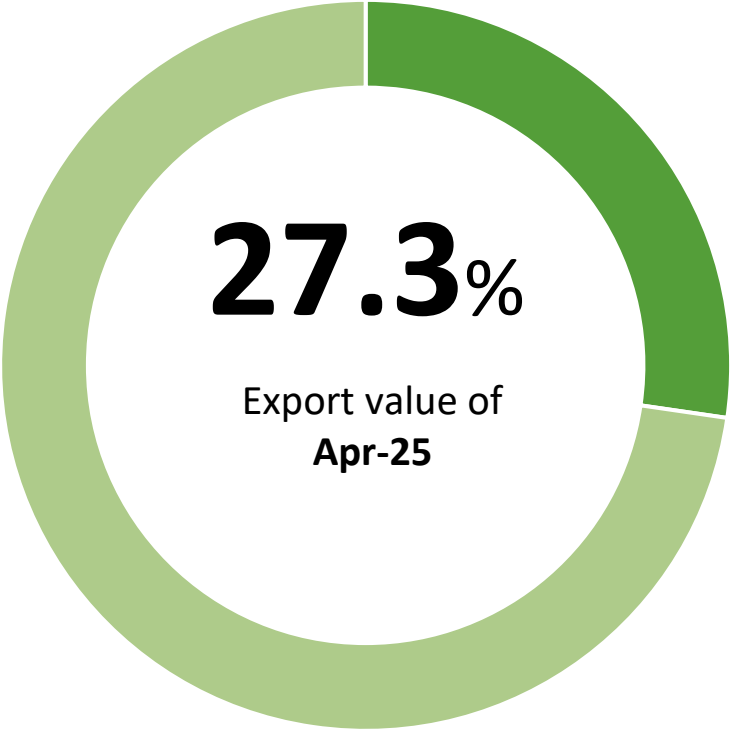


FRUITS AND VEGETABLES (EXPORT)

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



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



Source: Calculated from data of the General Department of Customs

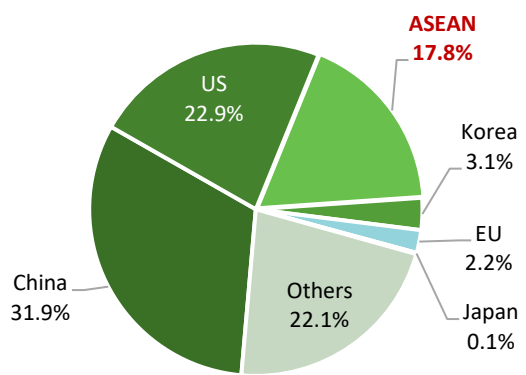


FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Apr-2025



Percentage of import value to the ASEAN, Apr-2025



Import results to the ASEAN, Apr-2025



Increase **5.4%** compared to Mar-25

Increase **39.9%** compared to Apr-24

7.4 Mil. USD more than the monthly average rate in 2024.

Accumulated 4 month of 2025 reaches **112.1 Mil. USD**, and the rate is **36.3%** of the total in 2024.

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

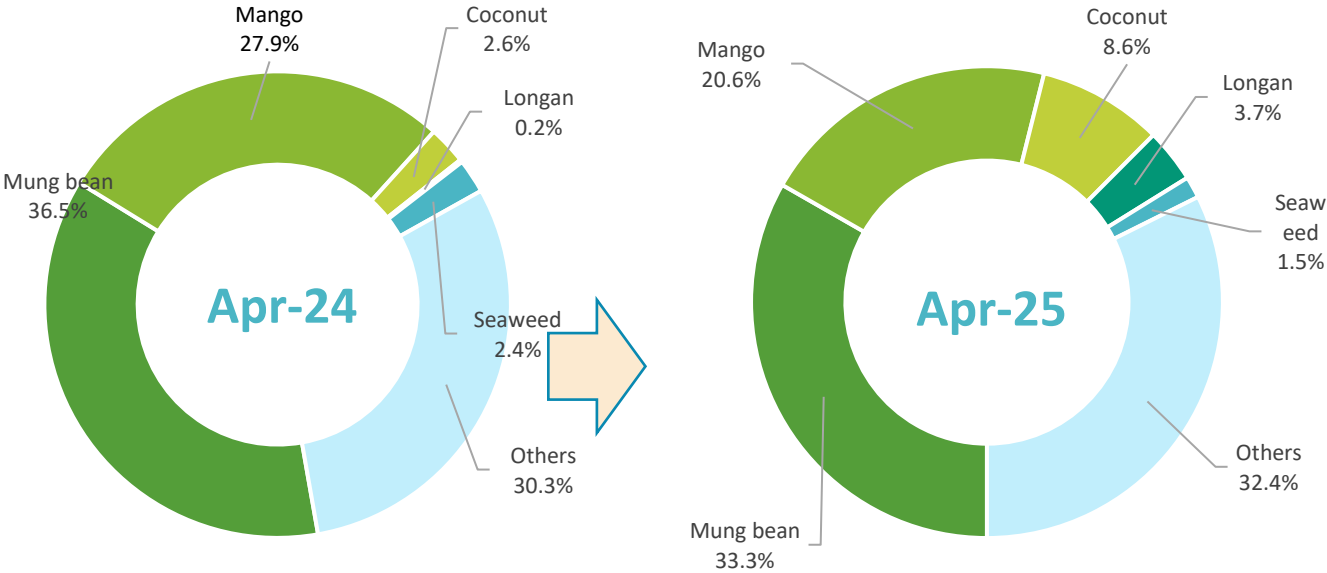


Source: Calculated from data of the General Department of Customs



FRUITS AND VEGETABLES (IMPORT)

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



Coconut

Value: **2.8** Mil. USD
 Increase **17.3%** compared to Mar-25
 Increase **353.7%** compared to Apr-24



Longan

Value: **1.2** Mil. USD
 Increase **4.0%** compared to Mar-25
28 time compared to Apr-24

Import results from the ASEAN, Apr-2025



Mung bean

Value: **11.0** Mil. USD
 Increase **10.0%** compared to Mar-25
 Increase **27.4%** compared to Apr-24



Mango

Value: **6.8** Mil. USD
 Increase **8.1%** compared to Mar-25
 Increase **3.3%** compared to Apr-24



Seaweed

Value: **0.49** Mil. USD
 Increase **96.1%** compared to Mar-25
 Decrease **12.3%** compared to Apr-24

Source: Calculated from data of the General Department of Customs



Thai durian will have its yellow O test rate reduced from May 10, 2025

Starting from May 10, 2025, China has reduced the inspection rate for yellow substance O (a chemical residue) in Thai durians originating from well-managed packing facilities. This adjustment aims to alleviate the congestion caused by stringent inspection procedures of thousands of tons of durians being delayed at border checkpoints. Currently, Thailand exports approximately 500–600 containers of durian per day to China, equivalent to around 10,000 tons. The country has nine officially recognized laboratories for yellow O testing, with an additional four laboratories currently applying for reinstatement of certification. In response, the Thai Ministry of Agriculture has urged exporters to maintain hygiene standards and strictly follow export protocols to ensure the stable and sustainable flow of durian exports to the Chinese market.

Source: Guojiguoshu.com

Cambodia opens first durian packing factory for export

Cambodia officially inaugurated its first durian packing plant dedicated to international export, located in Tbong Khmum province and invested by HF FRUIT Ltd. The facility will classify durians based on size, quality, and variety, and purchase them at market prices. This approach is expected to significantly reduce operational costs for farmers while encouraging adherence to higher production standards.

The establishment of the packing plant marks a strategic step toward accessing new international markets and enhancing Cambodia's global presence in the durian industry.

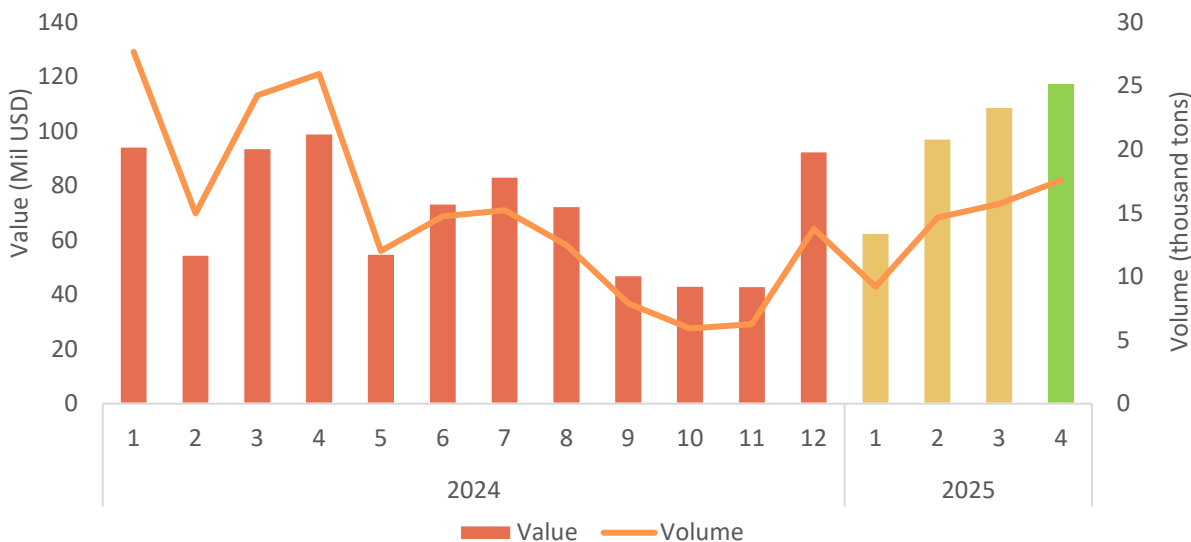
Source: Vietnambiz.vn



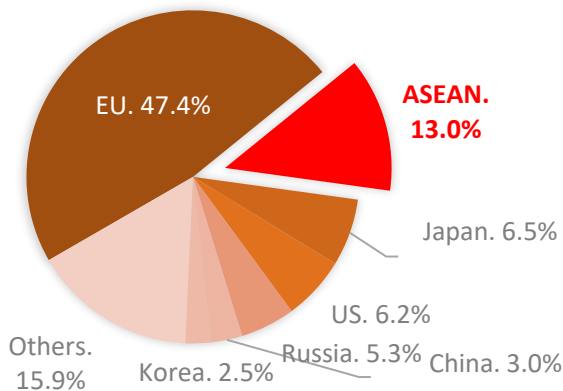


COFFEE

Export volume and value to ASEAN, Apr-2025



Percentage of export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025

VALUE

117.7 Mil. USD

↗ Increase **8.1%** compared to Mar-25

↗ Increase **18.7%** compared to Apr-24

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

❖ Accumulated 4 month of 2025 reaches **386.5** Mil.USD, and the rate is **45.4%** of the total in 2024.

VOLUME

17.6 Thousand tons

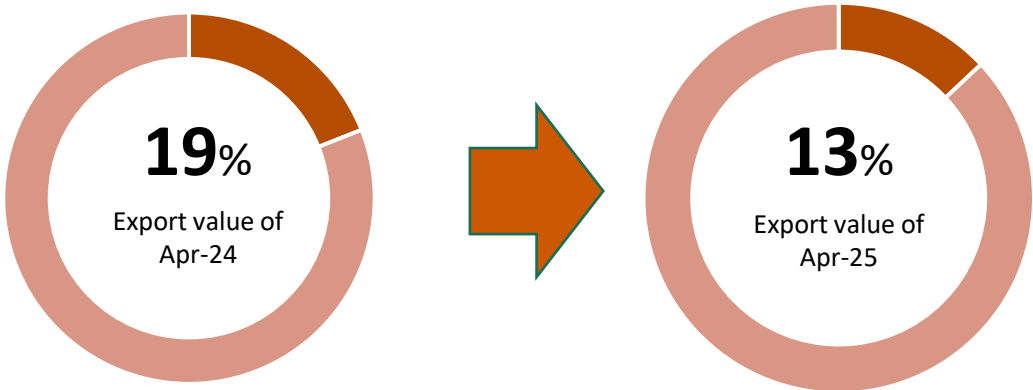
↗ Increase **11.9%** compared to Mar-25

↘ Decrease **32.3%** compared to Apr-24

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

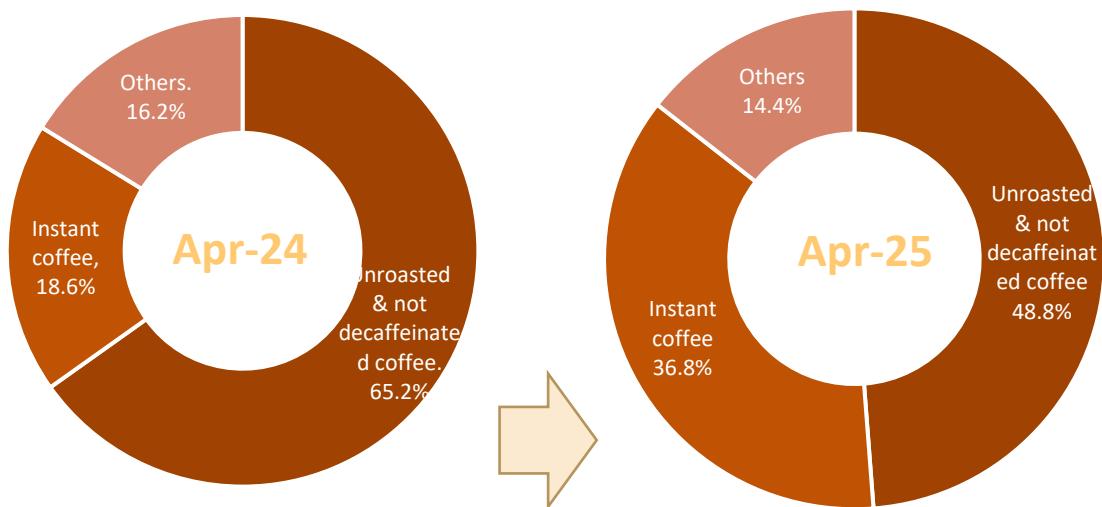
Accumulated 4 month of 2025 reaches **57.1** thousand tons, and the rate is **31.6%** of the total in 2024

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

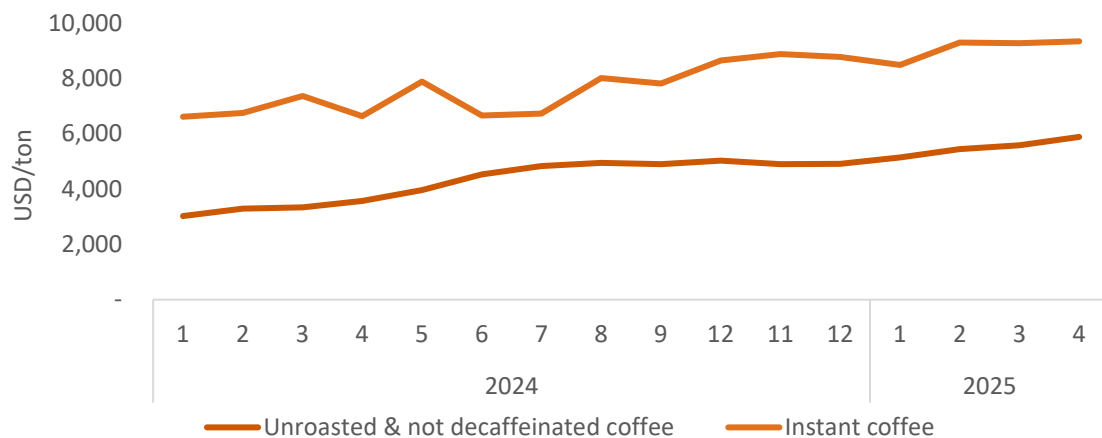


COFFEE

Structure of exports by products to ASEAN, Mar-2025



Average export price to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Unroasted & not decaffeinated coffee

Value: **65.6** Mil. USD
 Increase **23.5%** compared to Mar-25
 Decrease **10.4%** compared to Apr-24



Instant coffee

Value: **35.1** Mil. USD
 Decrease **12.2%** so compared to Mar-25 Increase **164%** compared to Apr-24



Others

Value: **16** Mil. USD
 Increase **9.4%** compared to Mar-25
 Increase **116%** compared to Apr-24

Instant coffee

The average export price in Apr-25 is **9.339** USD/ton. Increase **0.8%** compared to the previous month, and Increase **25.8%** compared to the same month in 2024.

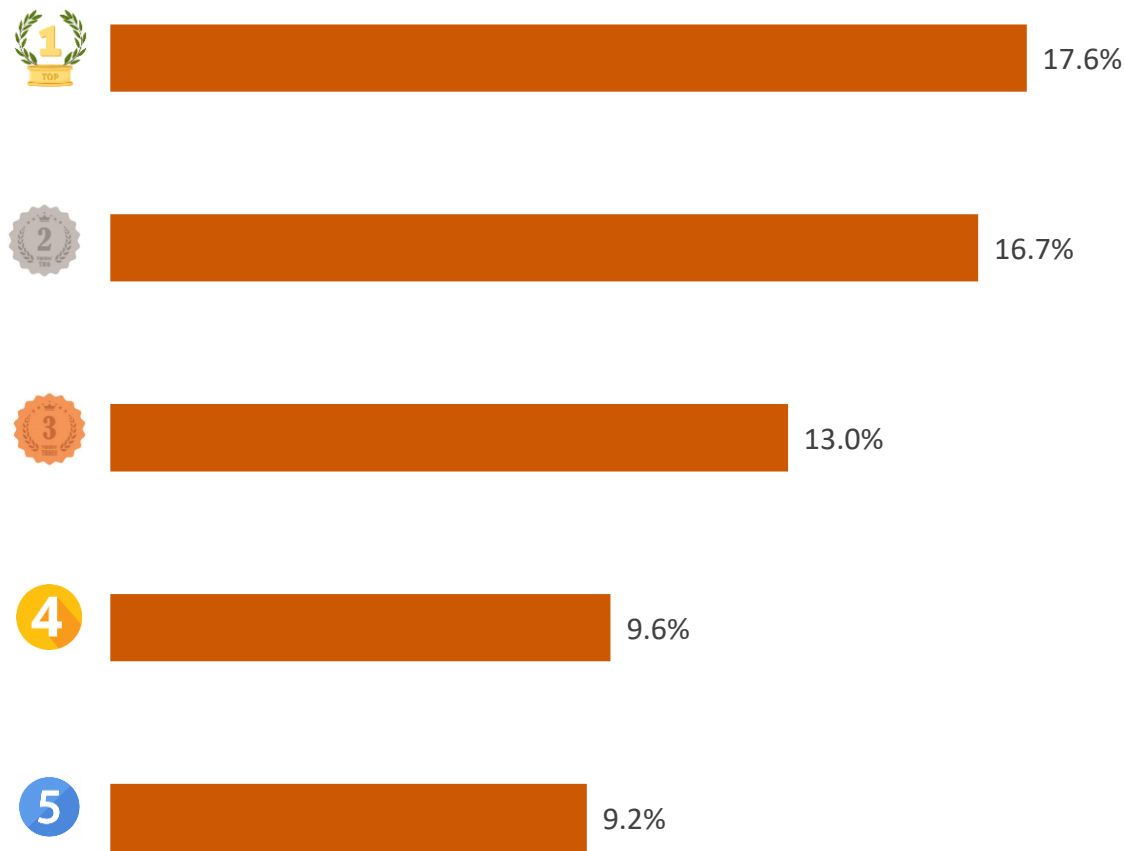
Unroasted & not decaffeinated coffee

The average export price in Apr-25 is **5.883** USD/ton; Increase **5.5%** compared to the previous month, and Increase **64.6%** compared to the same month in 2024.

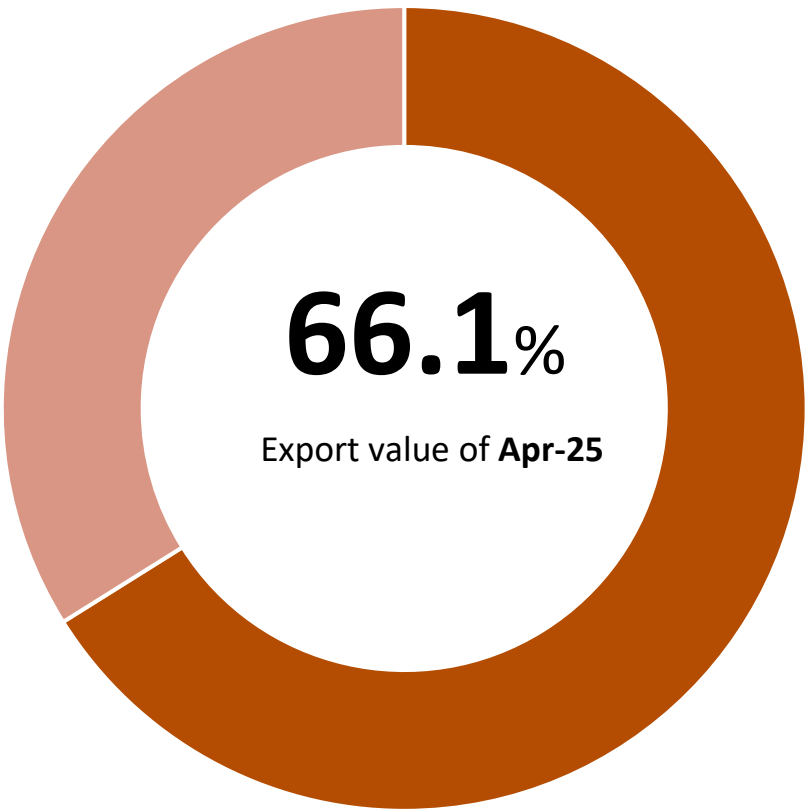


COFFEE

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



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



Source: Calculated from data of the General Department of Customs



In the first quarter of 2025, according to data from Malaysia's Customs Authority, the country imported a total of 22,300 tons of coffee with a total value of USD 132.3 million. Compared to the same period in 2024, this represents an increase of 5.8% in volume and a significant 66.9% increase in value. The average import price reached USD 5,942 per ton, up 57.8% year-on-year, reflecting a clear upward trend in international coffee prices.

Notably, the import prices of coffee from major suppliers all increased, with Vietnam recording the highest growth. Specifically, the import price from Vietnam reached USD 5,459 per ton, marking an 84.9% increase compared to the first quarter of 2024. This indicates a strong upward pricing trend and highlights Vietnam's increasingly important role in the coffee supply chain to the Malaysian market.





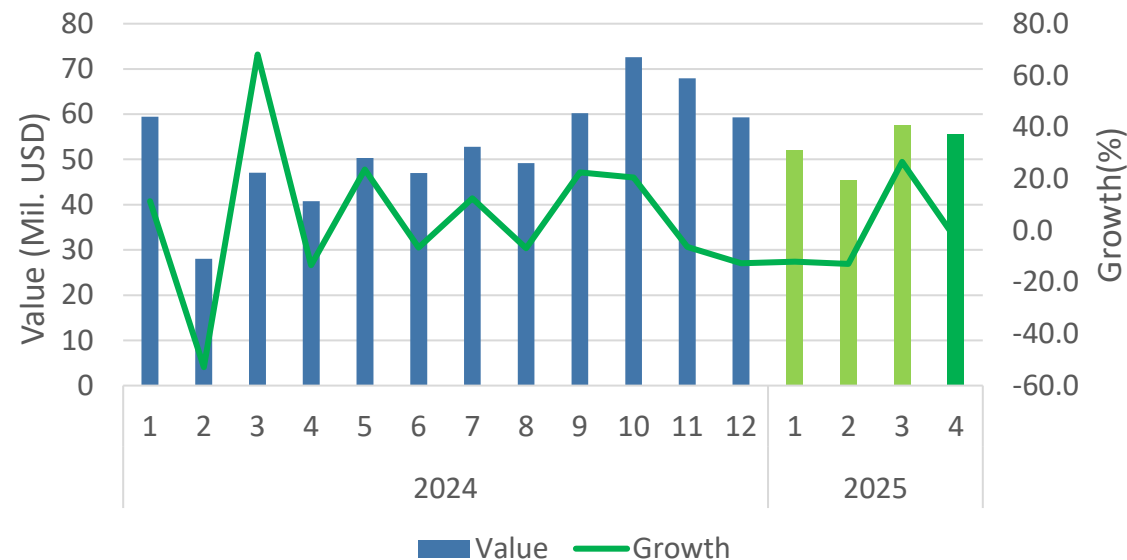
In the 2025/26 coffee crop year, Indonesia's coffee production is projected to increase by 5%, reaching 11.3 million bags. This growth is attributed to favorable weather conditions and increased use of production inputs. Coffee exports are expected to rise by 7%, totaling 6.5 million bags, while domestic consumption is forecast to remain at around 4.8 million bags. The United States continues to be one of the largest importers of green coffee beans from Indonesia.





FISHERIES

Export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025

VALUE



55.5 Mil. USD

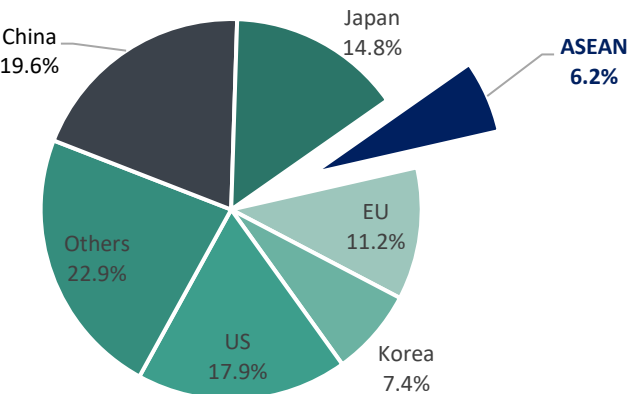
Decrease **3.4%** compared to Mar-25

Increase **36.2%** compared to Apr-24

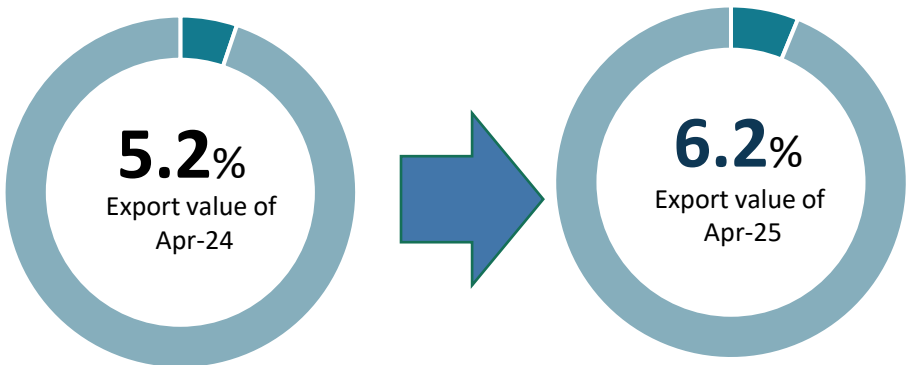
2.6 Mil. USD more than the monthly average rate in 2024.

Accumulated 4 month of 2025 reaches **210.6 Mil. USD**, and the rate is **33.2%** Value 2024

Percentage of export value to ASEAN, Apr-2025



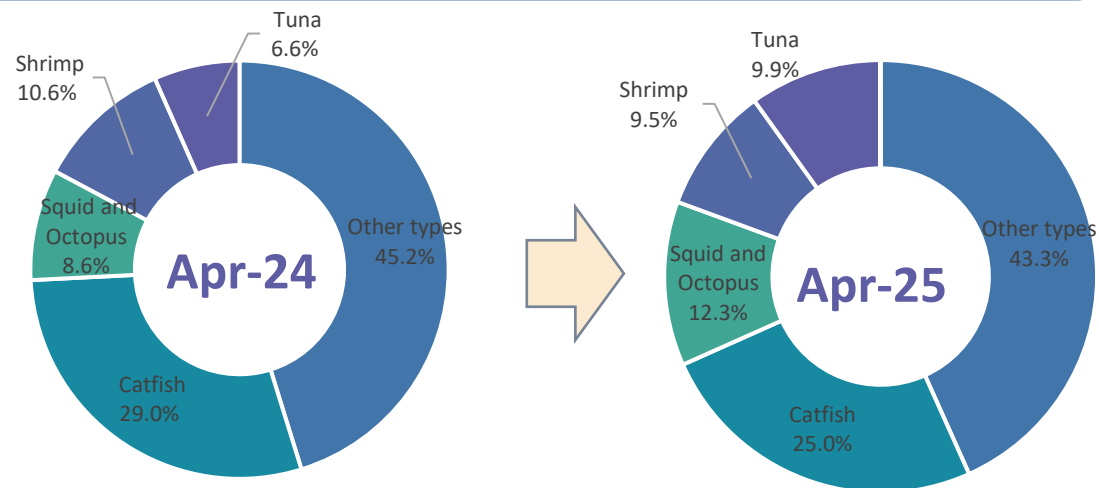
Change in percentage of export to ASEAN, Apr-2025



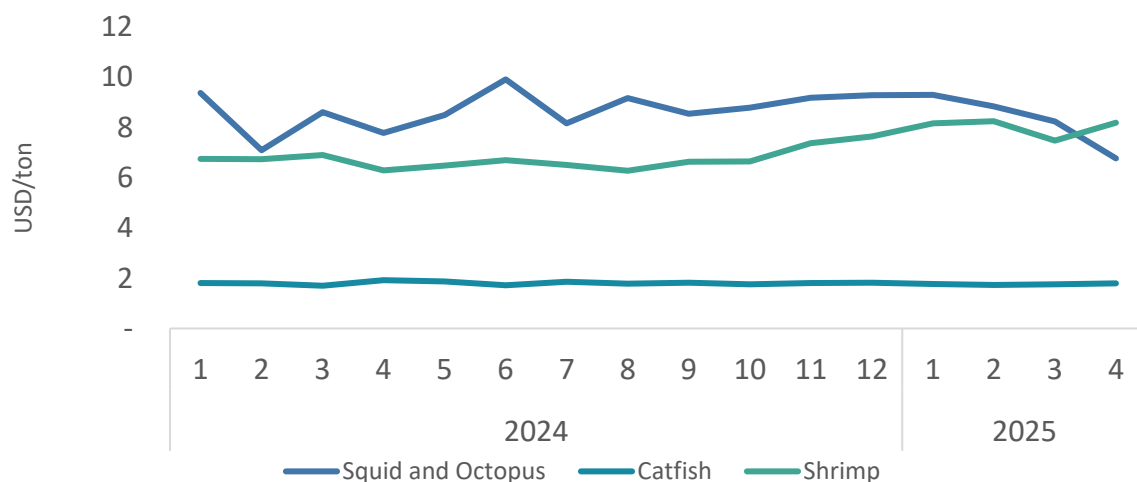


FISHERIES

Structure of exports by products to ASEAN, Mar-2025



Average export price to ASEAN, Mar-2025



Export results to ASEAN, Mar-2025



Catfish

Value: **13.9** Mil. USD

Decrease 12.9% compared to Mar-25

Increase 18.2% compared to Apr-24



Squid & Octopus

Value: **6.8** Mil. USD

Decrease 25.3% compared to Mar-25

Increase 95.0% compared to Apr-24



Shrimp

Value: **5.3** Mil. USD

Increase 1.4% compared to Mar-25

Increase 22.7% compared to Apr-24

Squid & Octopus

The average export price in Apr-25 is **6.8 USD/kg**; **Decrease 17.9%** compared to the previous month; and **Decrease 13.0%** compared to the same month in 2024.

Catfit

The average export price in Apr-25 is **1.8 USD/kg**; **Increase 2.3%** compared to the previous month; and **Decrease 6.7%** compared to the same month in 2024.

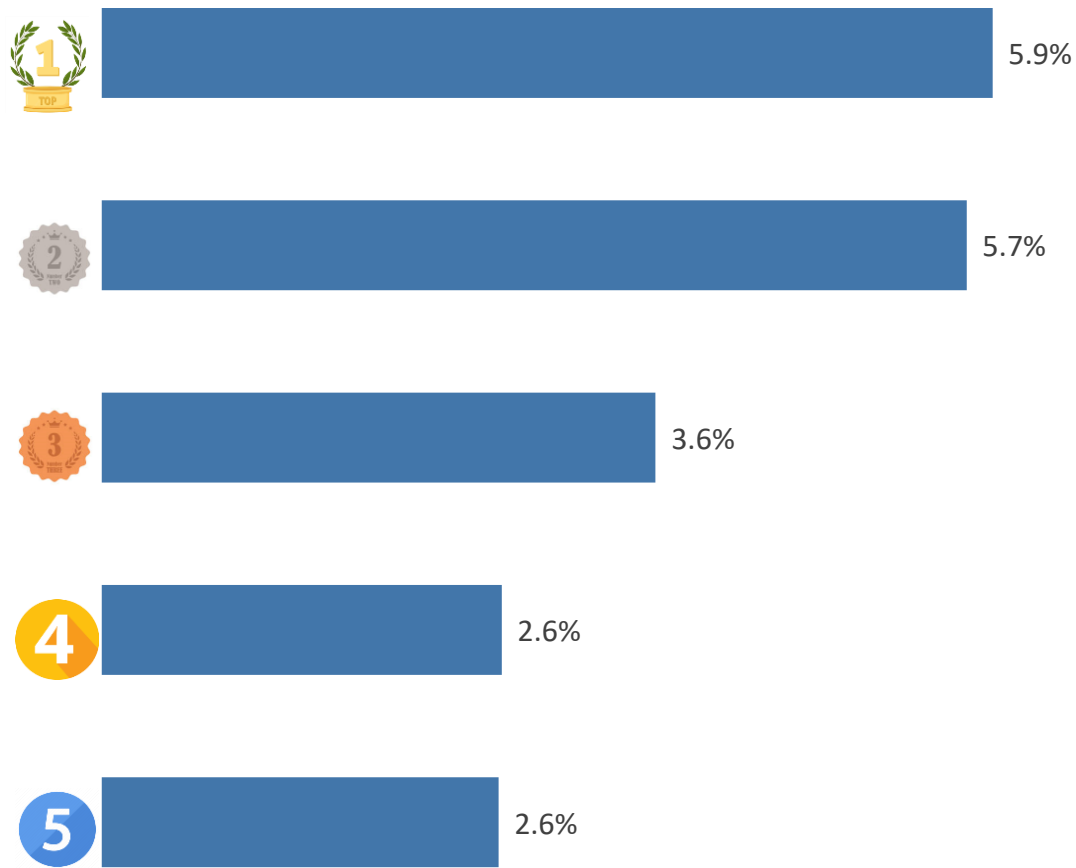
Shrimp

The average export price in Apr-25 is **8.2 USD/kg**; **Increase 9.5%** compared to the previous month; and **Increase 30.1%** compared to the same month in 2024.

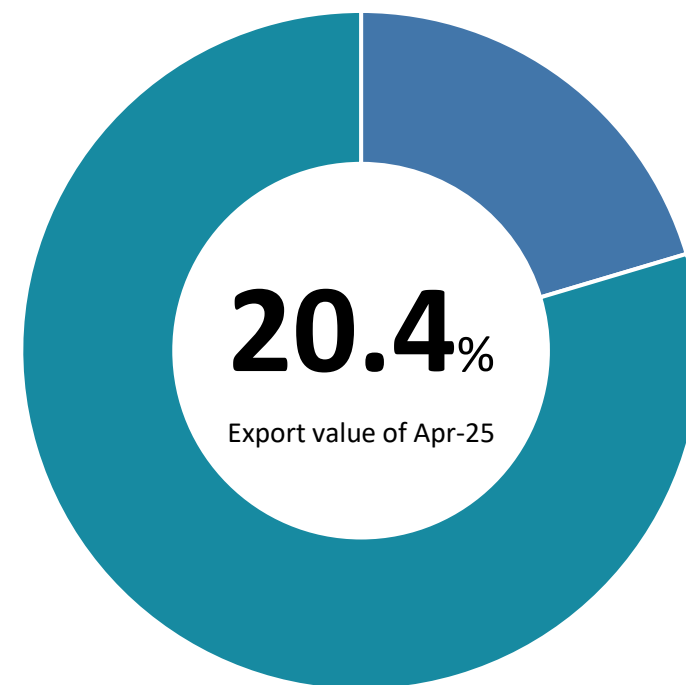


FISHERIES

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



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



01

ADB and Thai Union Partner Cooperate to Promote Sustainable Shrimp Farming in Thailand

On May 8, 2025, the Asian Development Bank (ADB) and Thai Union Group signed a \$150 million “Blue Loan” agreement—the ADB’s first loan to support the private agriculture sector in Thailand.

The loan package includes \$50 million from ADB and \$100 million from international banks, aimed at supporting Thai Union in the sustainable procurement, processing, and export of shrimp. It also funds training programs, certification processes, research, and pilot models for climate-resilient shrimp farming.

This initiative is under Thai Union’s green finance strategy, with the objective of enhancing the sustainability, traceability, and the resilience of the shrimp value chain in the face of environmental challenges.

Source: ADB



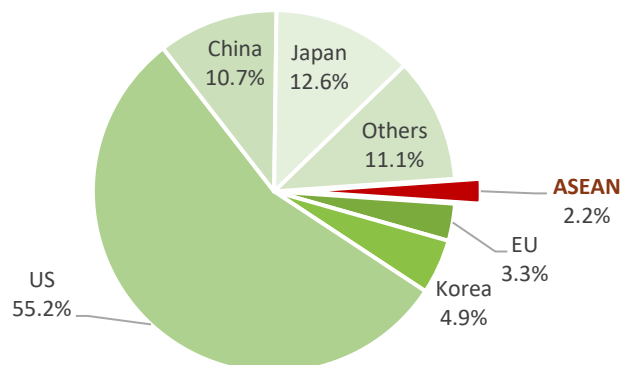


WOOD & WOODEN PRODUCTS

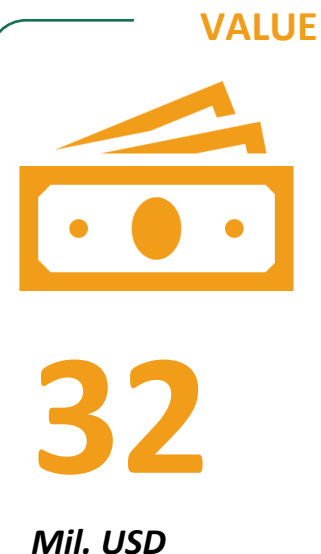
Export volume and value to ASEAN, Apr-2025



Percentage of export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025



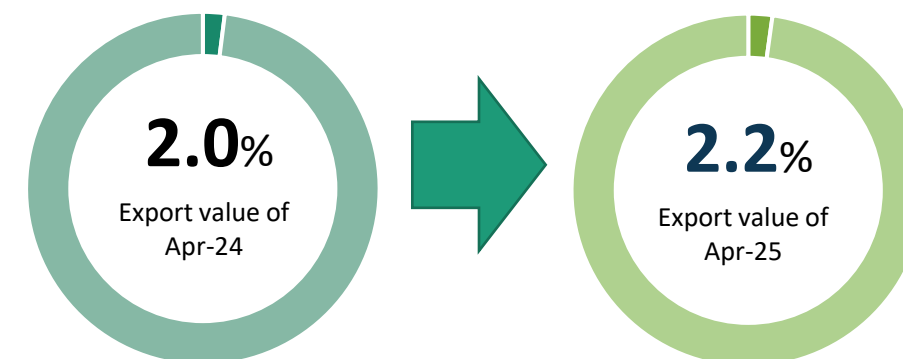
Decrease **11.2%** compared to Mar-25

Increase **16.4%** compared to Apr-24

↑ **4.3 Mil. USD** more than the monthly average rate in 2024.

Accumulated 4 month of 2025 reaches **116.9** Mil. USD, and the rate is **35.6%** Value 2024

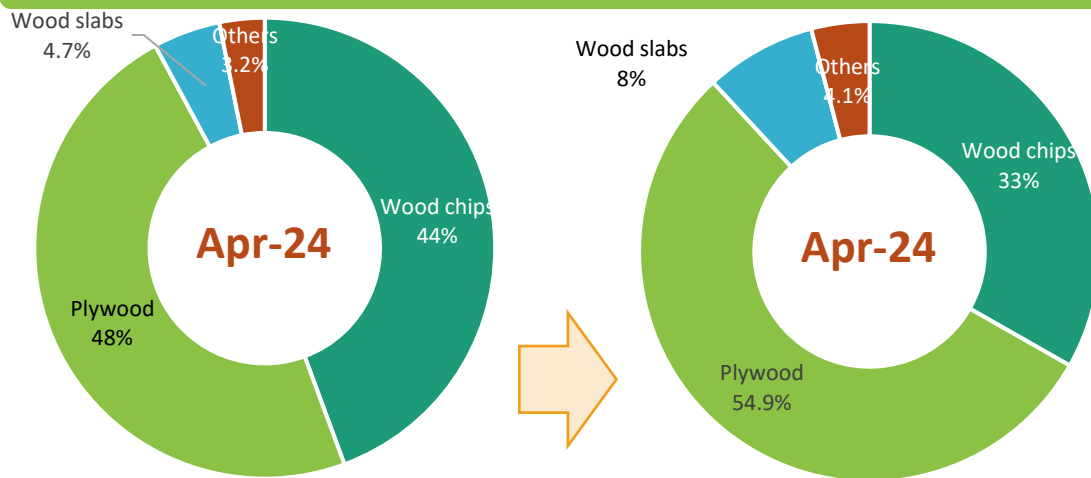
Changes in percentage of export value to ASEAN, Apr-2025





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025



Plywood

Value: **25.4** Mil. USD

Decrease **9%** compared to Mar-25

Increase **17%** compared to Apr-24



Wood chips

Value: **15.4** Mil. USD

Decrease **25%** compared to Mar-25

Decrease **24%** compared to Apr-24



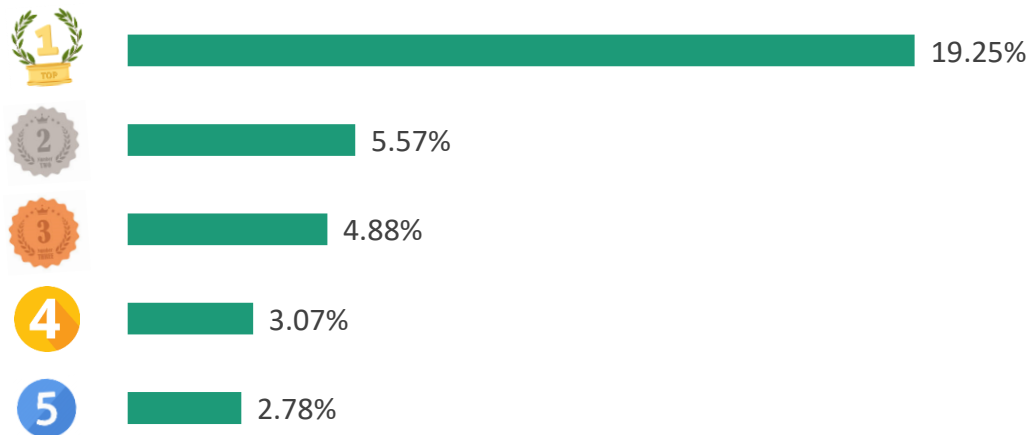
Wood slabs

Value: **3.6** Mil. USD

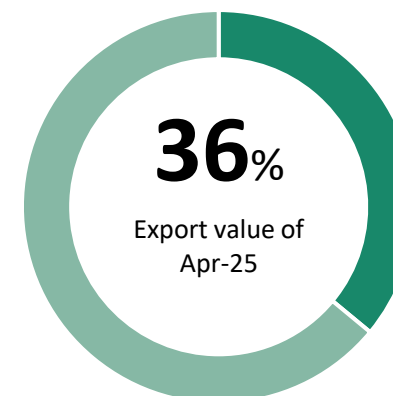
Increase **1%** compared to Mar-25

Increase **68%** compared to Apr-24

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



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



WOOD & WOODEN PRODUCTS

SPOTLIGHT



Furniture manufacturers in Indonesia are actively seeking to access new markets in Central and Eastern Europe, despite recent tariff changes in the United States having yet to impact them. Expanding into new markets is considered as a strategic move to proactively adapt to future geopolitical shifts, especially given that the United States currently accounts for approximately 53% of Indonesia's total furniture export value.

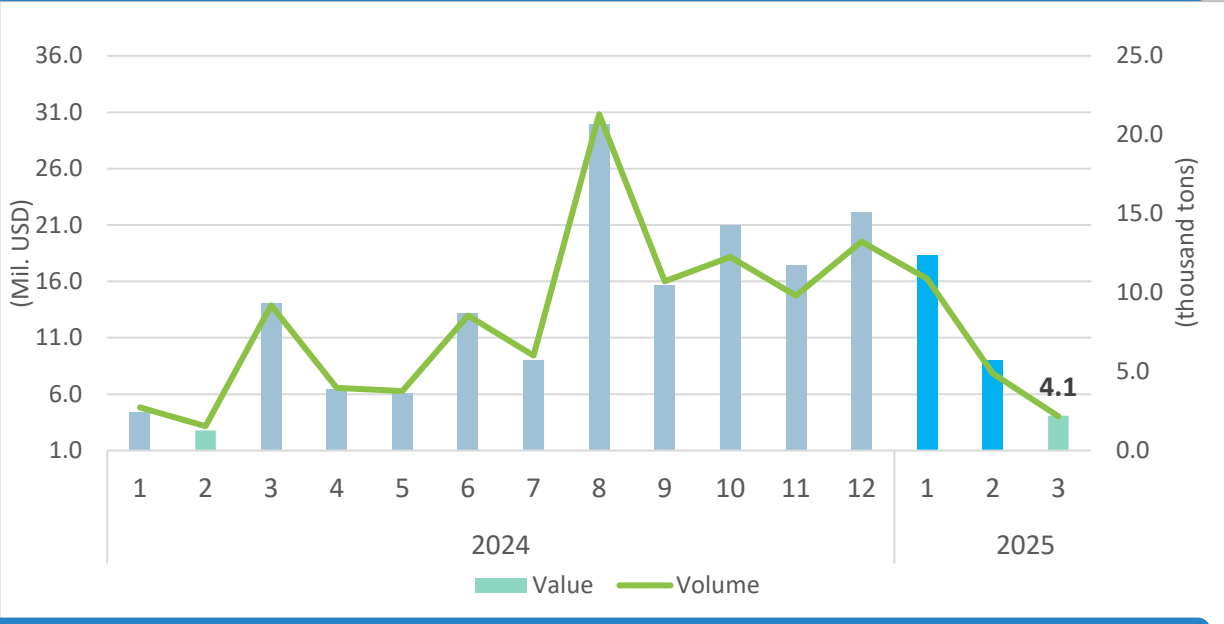
To support this market diversification strategy, Indonesian furniture products have been showcased at the HOME Design 2025 exhibition held at the Hungexpo Budapest Congress and Exhibition Center in Hungary. According to Ms. Suci Mahanani, Director of the Indonesian Trade Promotion Center in Budapest, this is the largest retail trade fair in Hungary specializing in furniture, home appliances, accessories, and home decoration products.

The forests of the Bago Yoma mountain range in Myanmar are currently facing severe degradation risks due to escalating armed conflict and a sharp increase in illegal logging activities since 2021. Previously, in 2016, the government led by the National League for Democracy (NLD) imposed a nationwide logging ban for one year. In the case of Bago Yoma, the moratorium was extended until 2026 due to the area's critical forest decline.

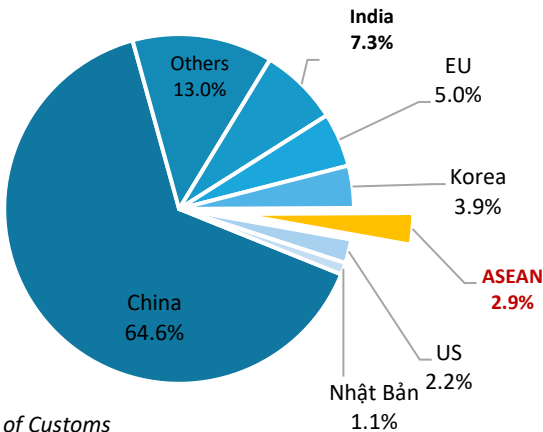
Reports indicate that armed groups from both sides of the conflict are involved in logging operations—either directly participating in timber extraction, collecting fees at checkpoints, or permitting logging to occur under their control.



Export volume and value to ASEAN, Feb-2025



Percentage of export value to ASEAN, Feb-2025



Source: Calculated from data of the Department of Customs

Export results to ASEAN, Feb-2025

VALUE

4.1 Mil. USD

↘ Decrease **54.5%** compared to Mar-25

↗ Increase **21.5%** compared to Apr-24

↓ **4.8 Mil. USD** less than the monthly average rate in 2024.

♦ Accumulated 4 months of 2025 reaches **43.7 Mil.USD**, and the rate is **41%** of the total in 2024.

VOLUME

2.17 nghìn tấn

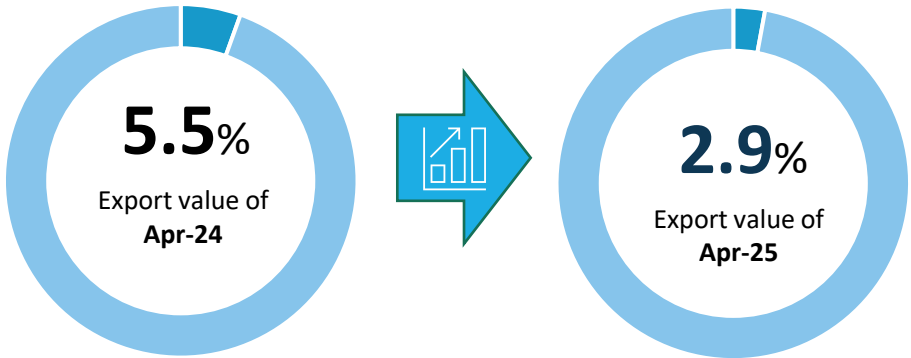
↘ Decrease **55.4%** compared to Mar-25

↗ Increase **10.4%** compared to Apr-24

↓ **3.2 thousand tons** less than the monthly average rate in 2024.

♦ Accumulated 4 months of 2025 reaches **24.3 thousand tons**, and the rate is **37.5%** of the total in 2024.

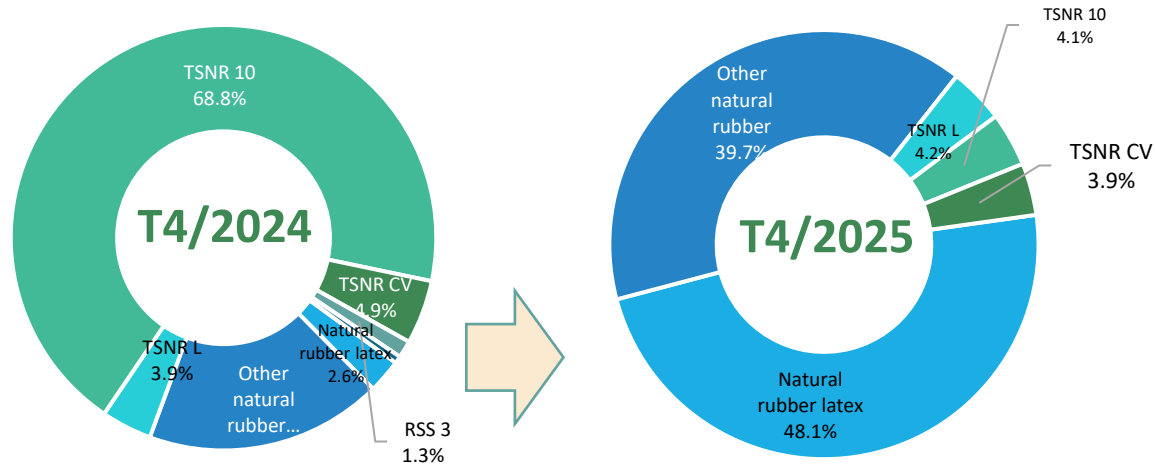
Changes in percentage of export value to ASEAN, Feb-2025



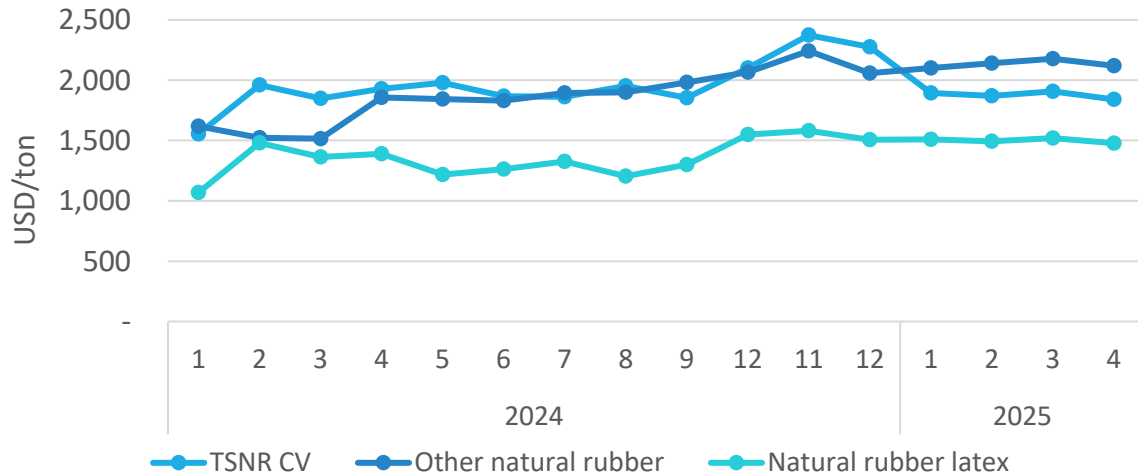


RUBBER

Structure of exports by products to ASEAN, Apr-2025



Average export price to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025



Other natural rubber

Value: **1.97** Mil. USD

Decrease **45%** compared to Mar-25

Increase **1082%** compared to Apr-24



TSNR CV

Value: **0.17** Mil. USD

Decrease **94%** compared to Mar-25

Decrease **96%** compared to Apr-24



Natural rubber latex

Value: **1.63** Mil. USD

Increase **7.1%** compared to Mar-25

Increase **39.6%** compared to Apr-24

Other natural rubber

The average export price in Apr-25 is **2.119** USD/ton; Decrease **2.7%** compared to the previous month; and Increase **14%** compared to the same month in 2024.

TSNR CV

The average export price in Apr-25 is **1.842** USD/ton; Decrease **3.5%** compared to the previous month; and Increase **18.5%** compared to the same month in 2024.

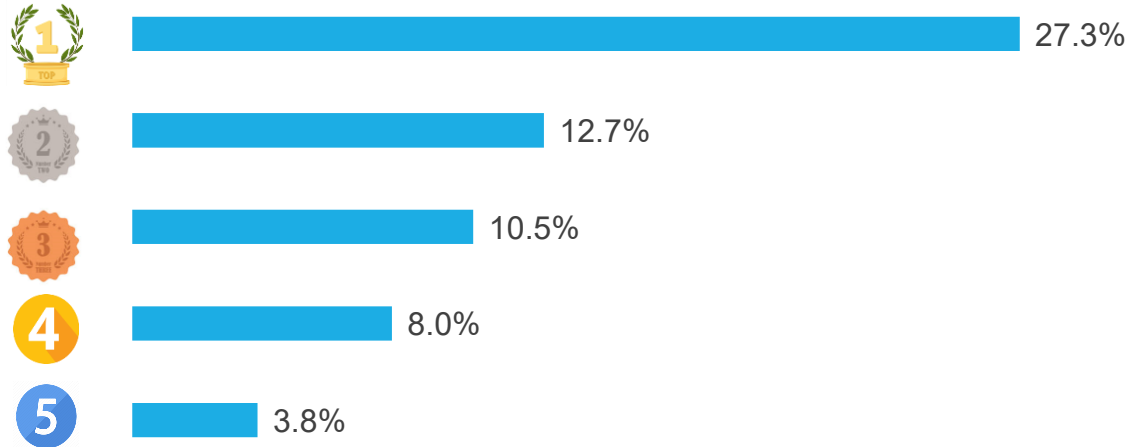
Natural rubber latex

The average export price in Apr-25 is **1.478** USD/ton; Decrease **2.7%** compared to the previous month; and Increase **6.4%** compared to the same month in 2024.

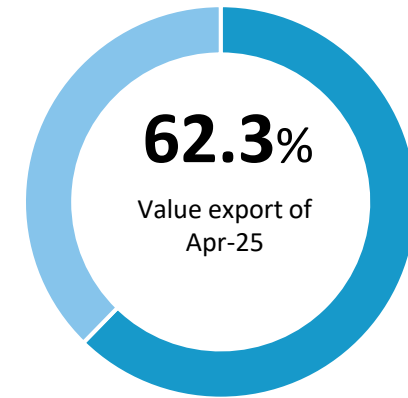


RUBBER

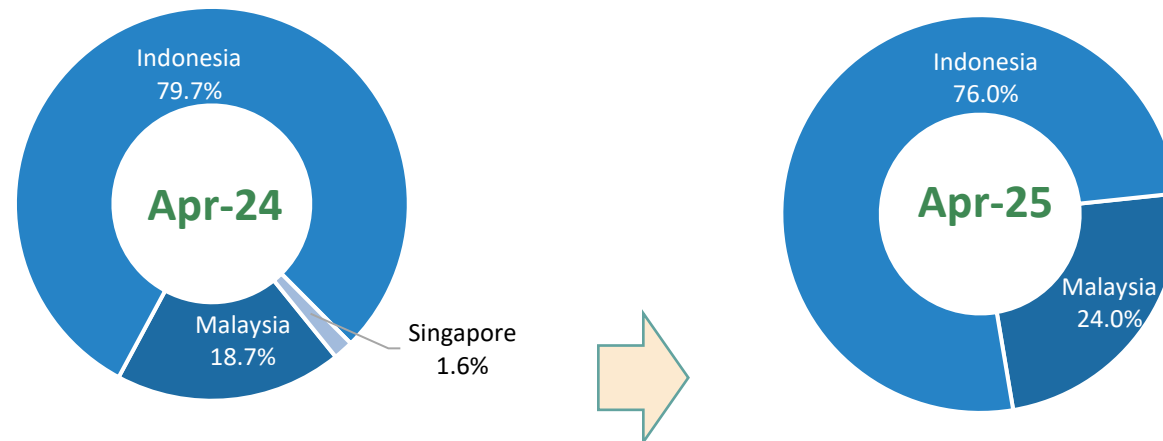
TOP 5 export enterprises by value to ASEAN, Apr-2025



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



Fluctuations in the proportion of Vietnam's rubber exports to some ASEAN countries, Apr-2025





RUBBER

SPOTLIGHT

❖ Thailand grants rubber tree ownership to farmers

The Ministry of Agriculture and Cooperatives of Thailand will launch a national program for issuing ownership certificates for rubber and timber trees. The initiative aims to help farmers convert their trees into capital assets, thereby increasing income and improving economic stability.

Specifically, the Minister of Agriculture and Cooperatives will announce the official rollout of two types of certificates: the “Crop Ownership Certificate” and the “Rubber Tree Ownership Certificate.” These certificates will allow farmers to use their registered trees as collateral for loans or to leverage their value within the Thai economy.

The ministry plans to expand this certification program nationwide to support farmers to benefit economically while also promoting long-term environmental conservation and sustainable land management practices.

Source: caosu.com.vn





RUBBER

SPOTLIGHT

❖ Indonesia strengthens forest monitoring to comply with EUDR

To comply with the European Union's new anti-deforestation regulation (EUDR), Indonesia has launched the Ground Truthed.id (GTID) platform, which utilizes geolocation data and field-based evidence to monitor environmental violations in practical time. GTID collaborates with local communities, civil society organizations, and regulatory authorities to verify the origin of raw materials and transform environmental reports into legal action. This initiative play an important role for Indonesia's rubber industry, which has long struggled with traceability and sustainability issues.

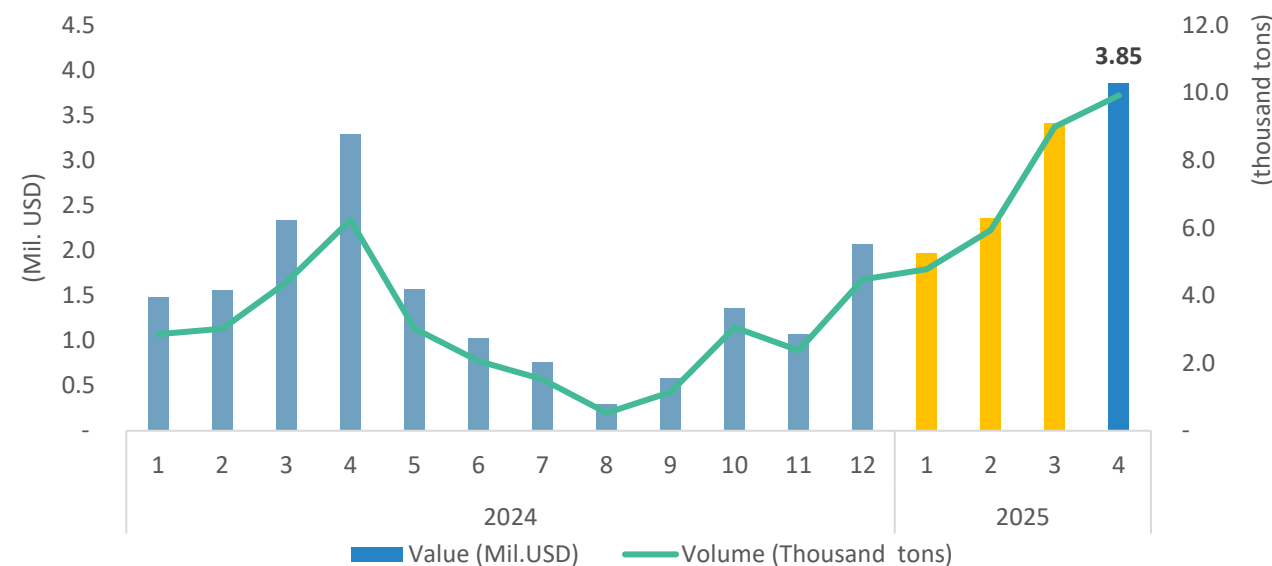
The rubber industry must adapt to this new monitoring tool to demonstrate that rubber production is not linked to deforestation or forest degradation since 2020. This presents a major challenge for smallholder farmers and producers, who must meet stringent due diligence requirements and provide verifiable data to maintain market access under the EUDR framework.





CASSAVA & CASSAVA PRODUCTS

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



Export results to ASEAN, Apr-25

Value
3.85 Mil. USD

↗ Increase **13%** compared to Mar-25

↘ Decrease **3.8%** compared to Apr-24

↗ Cao hơn **1.5** Mil. USD so với bình quân năm 2024

♦ Accumulated 4 month of 2025 reaches **11.6 tr USD**, đạt **41%** Value năm 2024

KHỐI LƯỢNG
9.92 nghìn tấn

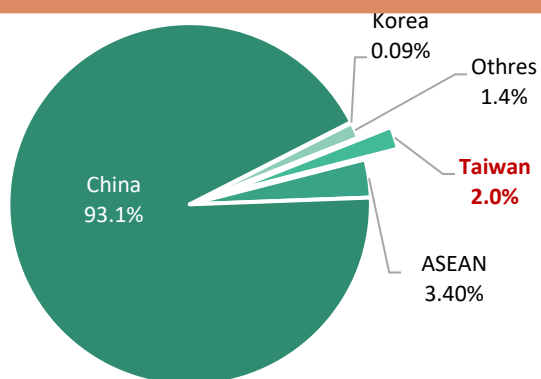
↗ Increase **10.3%** compared to Mar-25

↗ Increase **22%** compared to Apr-24

↗ Cao hơn **5.2** nghìn tấn so với bình quân năm 2024

♦ Accumulated 4 month of 2025 reaches **29.6** nghìn tấn, đạt **52.3%** khối lượng năm 2024

Percentage of export value to ASEAN, Apr-25



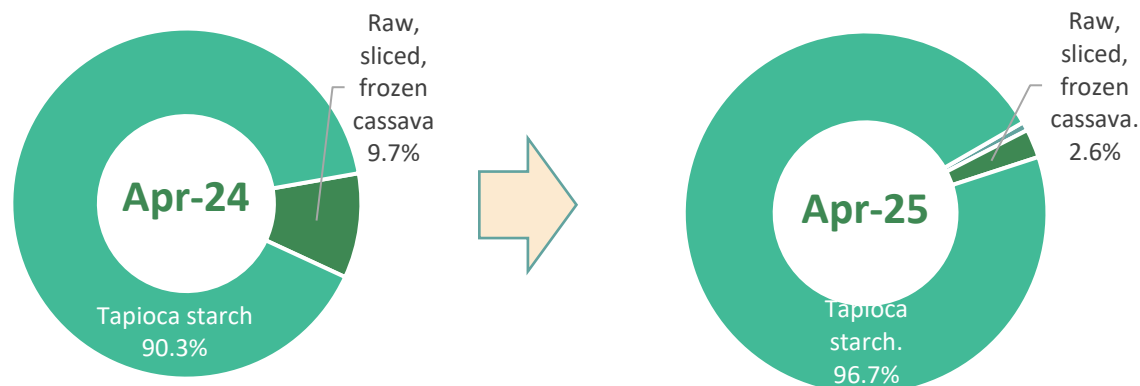
Changes in percentage of export value to ASEAN, Apr-25



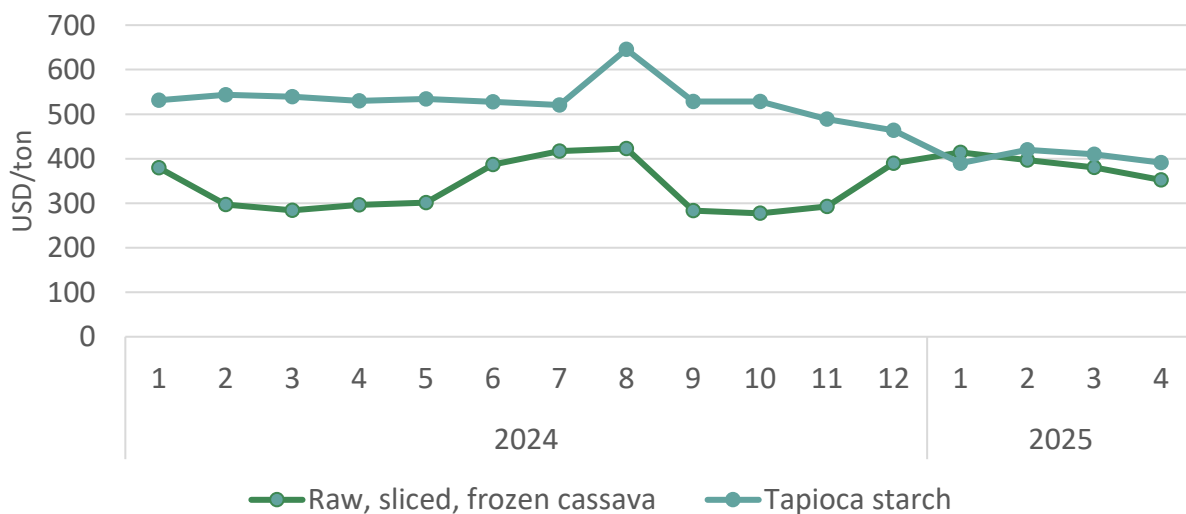


CASSAVA & CASSAVA PRODUCTS

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



Percentage of export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025



Raw, sliced, frozen cassava

Value: **2.7** nghìn USD

Decrease **97%** compared to Mar-25

Decrease **61%** compared to Apr-24



Tapioca starch

Value: **101.6** Mil. USD

Increase **11%** compared to Mar-25

Increase **58%** compared to Apr-24

Tapioca starch

The average export price in Apr-25 is **391** USD/ton; Increase **19%** compared to the previous month; and Decrease **26%** compared to the same month in 2024.

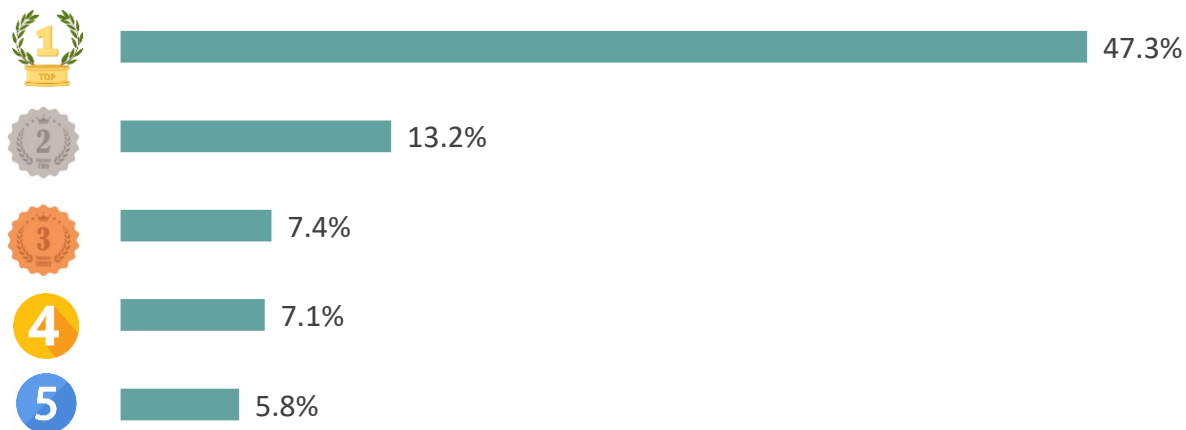
Raw, sliced, frozen cassava

The average export price in Apr-25 is **352** USD/ton; Decrease **14%** compared to the previous month; and Increase **3%** compared to the same month in 2024.

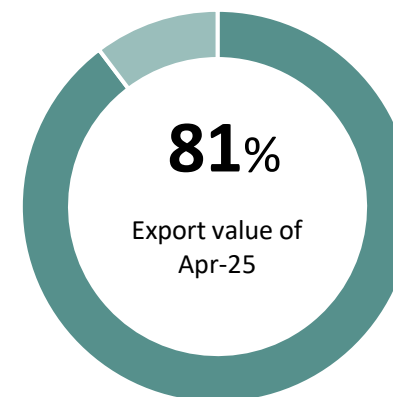


CASSAVA & CASSAVA PRODUCTS

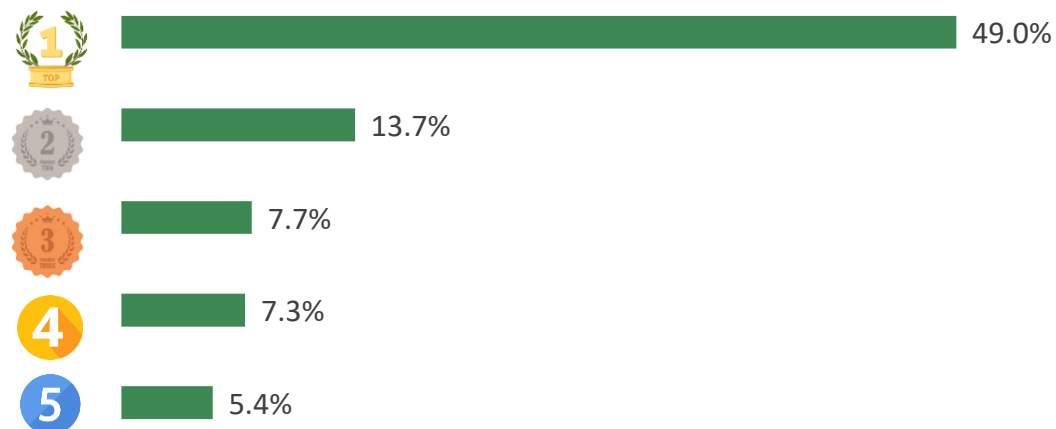
TOP 5 export enterprises by to ASEAN, Apr-2025



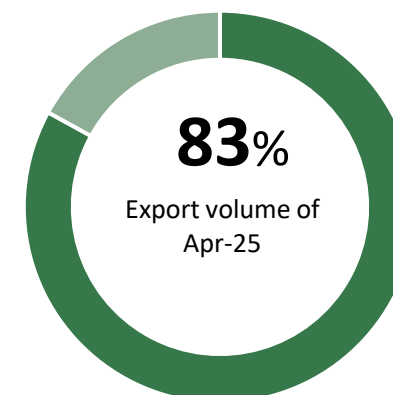
Value ratio of TOP 5 export enterprises to ASEAN, Apr-2025



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



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





Laos – China Railway become a 'savior' for Thailand's cassava products

The China–Laos Railway, a key project under the Belt and Road Initiative (BRI), is significantly boosting agricultural trade cooperation between China and Southeast Asia. In particular, Thailand's exports of cassava and cassava-based products to China have shown steady growth, facilitated by the railway connection and a bilateral trade agreement.

According to Thailand's Ministry of Commerce, the demand for cassava in China is rising, and the Thailand's government intends to further promote export initiatives to capitalize on this upward trend.

Source: antt.nguoiduatin.vn





Laos' cassava exports skyrocket in the first months of 2025

In the first four months of 2025, Laos' cassava exports surged by 43% compared to the same period last year, reaching over 156,000 tons. This growth is due to the Lao Railway Authority's policy of prioritizing the transport of agricultural products such as cassava, regardless of volume. In addition, strong market demand has encouraged local farmers to expand cassava cultivation.

Currently, Laos has 22 cassava processing plants producing 1 million tons of finished products annually, while domestic raw material capacity could support up to 3.7 million tons. In 2024, Laos harvested 7.5 million tons of cassava, exporting 2.4 million tons and earning over USD 400 million. The primary cultivation areas include the provinces of Champasack, Vientiane, Xayaboury, Sekong, Salavan, and Bolikhamxay.

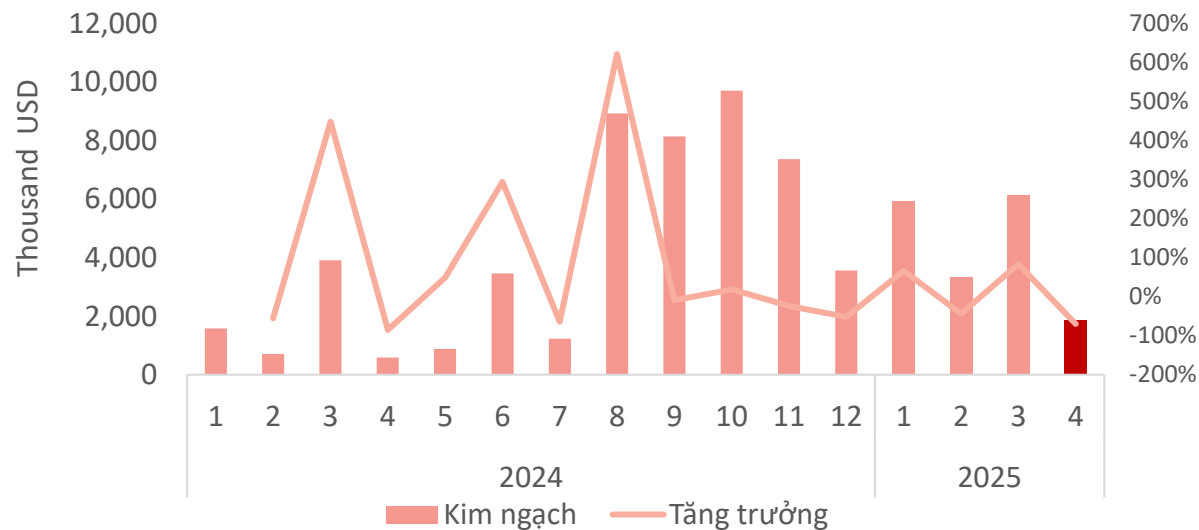
Source: forbes.vn





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025

VALUE



1.86

Mil. USD

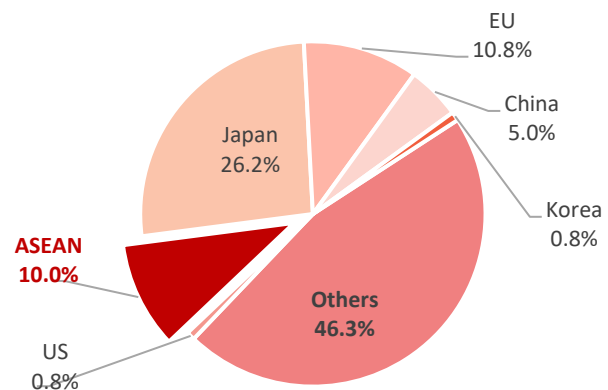
↘ Decrease **69.6%** compared to Mar-25

↗ Increase **216.7%** compared to Apr-24

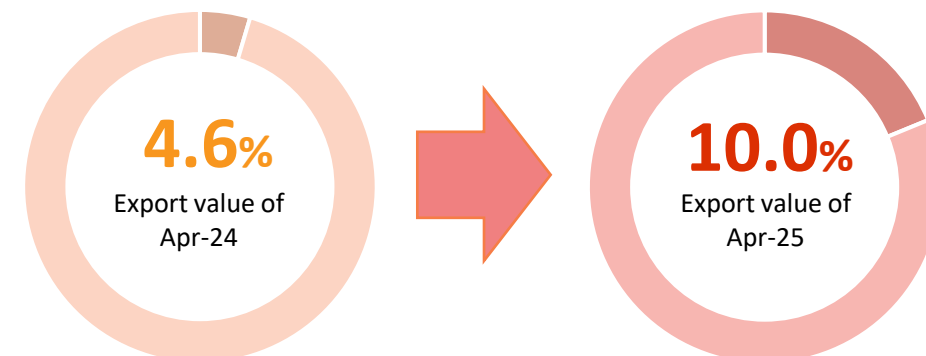
↗ **2.3 Mil. USD** more than the monthly average rate in 2024.

◇ Accumulated 4 month of 2025 reaches **17.3 Mil. USD**, and the rate is **34.4%** Value 2024

Percentage of export value to ASEAN, Apr-2025



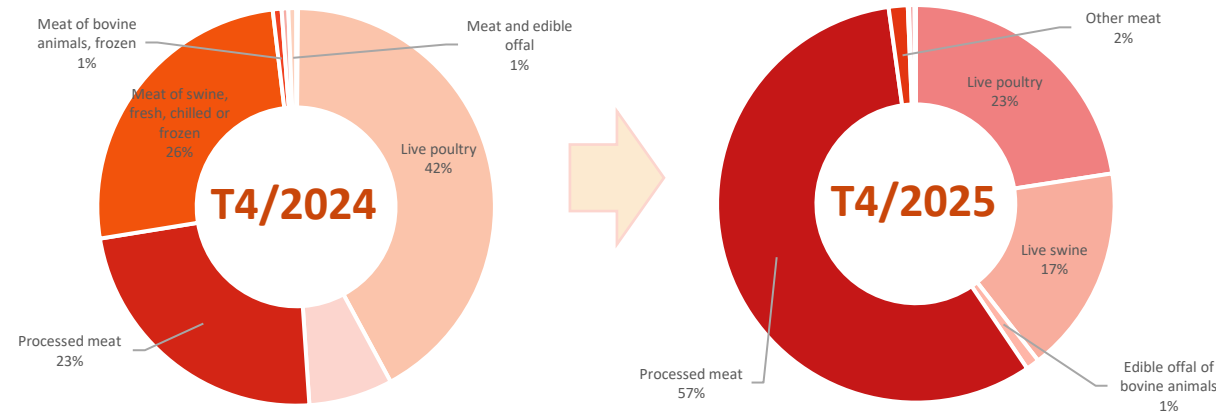
Changes in percentage of export value to ASEAN, Apr-2025





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Apr-2025



Export results to ASEAN, Apr-2025

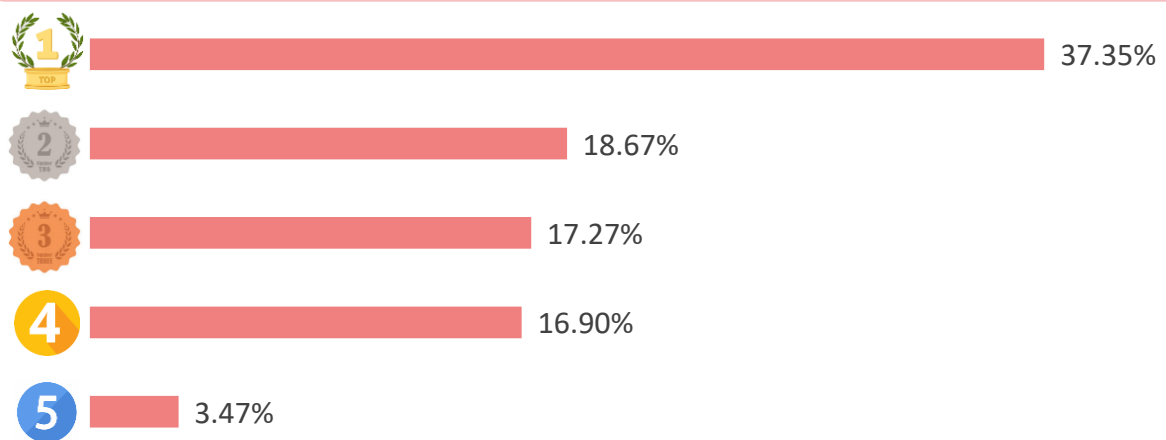


Processed meat
Value: **1.07** Mil. USD
Increase **30.6%** compared to Mar-25
Increase **671.3%** compared to Apr-24

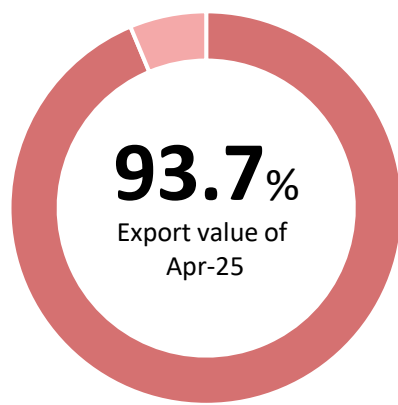


Live poultry
Value: **420.6** nghìn USD
Decrease **36.8%** compared to Mar-25
Increase **70.2%** compared to Apr-24

Percentage of export value to ASEAN, Apr-2025



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

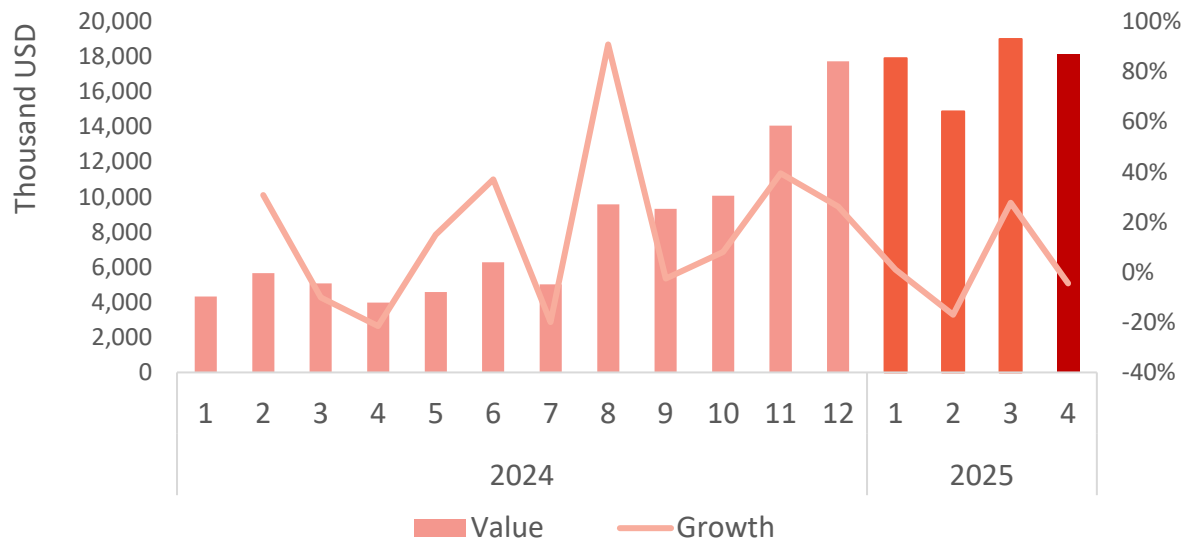


Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Apr-2025



Import results to ASEAN, Apr-2025

18.1
Mil. USD

VALUE

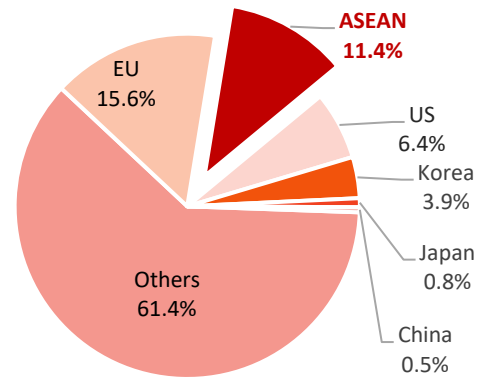
↘ Decrease **4.5%** compared to Mar-25

↗ Increase **355.2%** compared to Apr-24

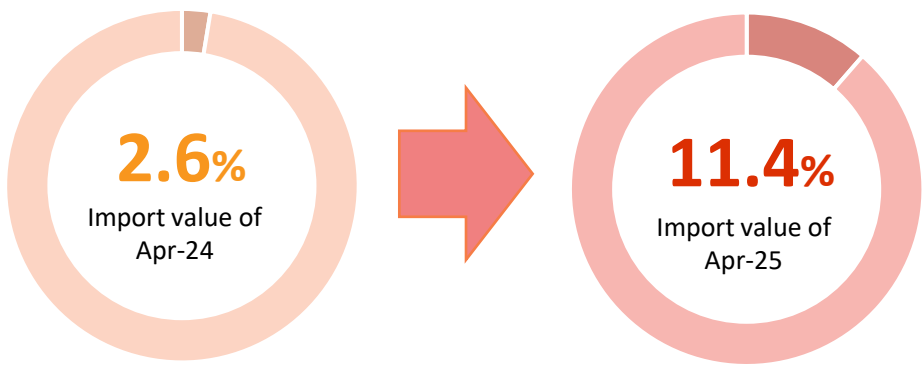
↗ **10.2 Mil. USD** more than the monthly average rate in 2024.

◇ Accumulated 4 month of 2025 reaches **69.9 Mil. USD**, and the rate is **73.1%** Value 2024

Percentage of import value to ASEAN, Apr-2025



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

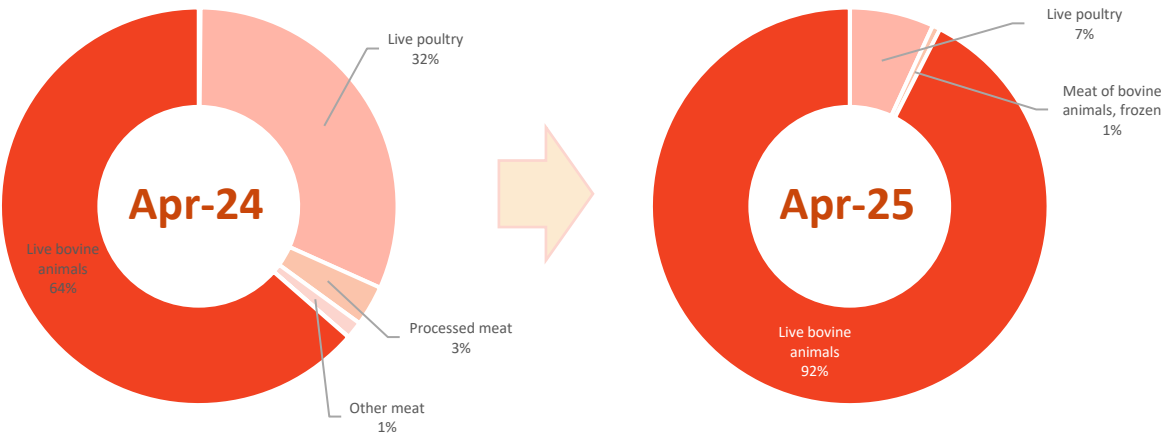


Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Apr-2025



Import results to ASEAN, Apr-2025



Live bovine animals

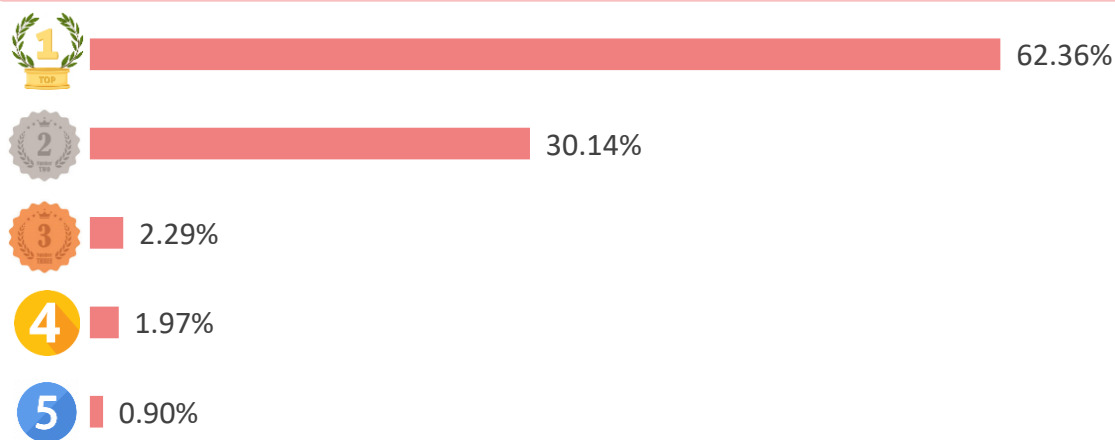
Value: **16.8** Mil. USD
Decrease **5.2%** compared to Mar-25
Increase **56 lần** compared to Apr-24



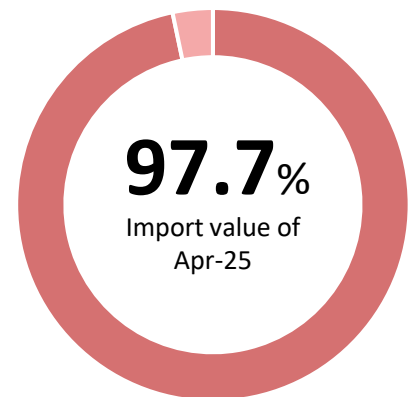
Live poultry

Value: **1.24** Mil. USD
Decrease **3.7%** compared to Mar-25
Decrease **1.37%** compared to Apr-24

Percentage of import value to ASEAN, Apr-2025



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



Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS

SPOTLIGHT



As part of its international audit process to expand food import markets, the Philippines' National Meat Inspection Service (NMIS) conducted inspections at two beef slaughtering facilities in Paraguay. The primary objective of this audit is to evaluate the food safety control systems and sanitary certification procedures at these establishments in accordance with international standards set by the Philippines.

This move aligns with the country's roadmap to open its market to beef, pork, and poultry products from Paraguay. It also reflects the Philippines' growing demand for animal protein, driven by a population that now exceeds 120 million people.

Source: agromeat.com

In Malaysia, the outbreak of African Swine Fever (ASF) in early 2025 in Tanjung Sepat (Selangor) led to the culling of 300 sows, causing a significant disruption in the pork supply chain. As a result, the price of fresh pork belly in the Klang Valley has surged to 40 ringgit per kilogram—an increase of 33% compared to 2020—marking the highest level in two years. In response to the rising prices, many consumers have shifted to more affordable protein sources such as chicken and fish to manage household expenses.

Source: vietnambiz.vn





For feedback, please send to:

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(AGREINFOS)**

Institute of Strategy and Policy on Agriculture and Environment

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