

Volum: May-2025

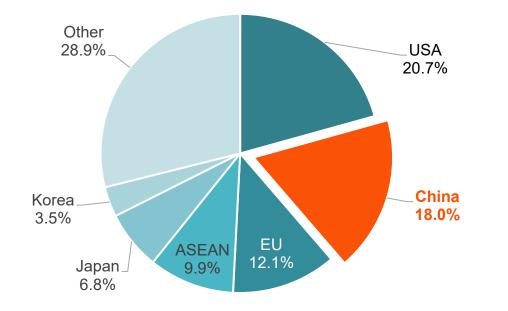
### MONTHLY REPORT ON AGRI-PRODUCT EXPORT

# FROM VIETNAM TO CHINA MARKET



Percentage of AFF product export value to the China, Apr-2025

Changes in percentage of AFF product export value to the China, Apr-2025 compared to Mar-2025 and Apr-2024



	Value (Mil.USD)	compared to Mar-2025	compared to Apr-2024
USA	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		

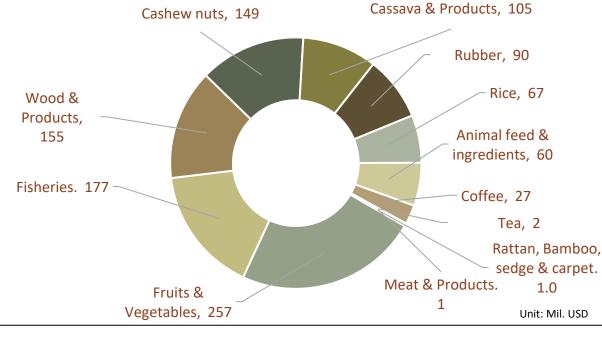


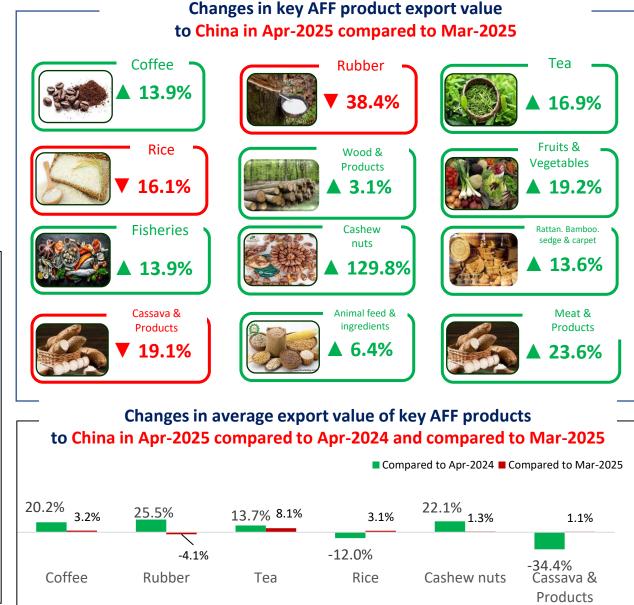


Export

Import

Import





Source: Calculated from data of the Department of Customs

Export

### China's economy grows amid trade tensions

According to China's National Bureau of the first four months of 2025. Among Statistics (NBS), industrial output in April industries, agricultural product processing increased bv 6.1% surpassing analysts' forecasts from financial data platform Wind. Retail sales also recorded a stable increase of 5.1%. Profits of industrial enterprises with Conversely, coal mining experienced the annual revenue exceeding 20 million yuan hardest hit, with profits declining by

the same period last year, higher than 2.6% in March.

Overall, industrial profits rose by 1.4% in year-on-year, and food manufacturing led with an impressive 45.6% increase, followed by non-ferrous metal processing and equipment electrical manufacturing. (\$2.78 million) grew by 3% compared to 48.9% over the four-month period. The oil

and gas extraction sector and automobile manufacturing also faced significant difficulties.



Source: Nguoiguansat.vn

### The U.S. and China agree to 90-day tariff suspension

After two days of negotiations in Geneva, Switzerland (May 10–11, 2025), the United States and China agreed to temporarily suspend certain reciprocal tariffs for 90 days. Specifically, the U.S. reduced import tariffs from 145% to 30%, while China decreased tariffs from 125% to 10%, and non-tariff barriers will also be removed.



However, on June 3, President Donald Trump signed an executive order doubling tariffs on steel and aluminum imports from 25% to 50%, effective from June 4, citing the

protection of domestic industries and national security concerns.

On June 4, at a ministerial-level meeting of the World Trade Organization (WTO) in France, China's Minister of Commerce called on the WTO to strengthen oversight of unilateral tariff measures and to develop fair, neutral trade policies.





# **FRUITS & VEGETABLES (EXPORT)**

Export volume and value to China, Apr-2025





257.

mil. USD

Export results to China, Apr-2025

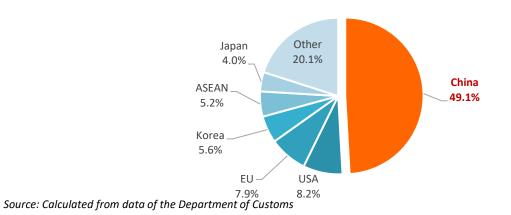
Increased **19.2**% compared to Mar-2025

Decreased **35.4**% compared to Apr-2024

**128.9 mil. USD** less than the monthly average rate in 2024

Accumulated 4 months of 2025 reaches 777.8 mil. USD. 16.8% of total 2024

### Changes in percentage of export value to China, Apr-2025





Percentage of export value to China, Apr-2025



# **FRUITS & VEGETABLES (EXPORT)**

Structure of exports by products to China, Apr-2025 Mango Mango Banana Jackfruit 11.7% 7.1% ruit Cocon 5.7% 13.1% Dragon Coconut fruit Chilli 9.8% 1.6% Chilli 4.1% Banana 2.6% Watermelo Watermelo 13.6% 2.6% 3.2% Apr-2024 Apr-2025 Pomelo Pomelo 2.5% 1.2% Passion Passion fruit fruit 2.0% 1.1% Other Other 11.4% Durian Dragon fruit 3.3% 51.2% 15.0% Durian 22.4%



### Value: 57.6 mil. USD Increased 155.7% compared to Mar-2025 Decreased **71.7%** compared to Apr-2024



Value: 38.7 mil. USD

Export results of some main products to China, Apr-2025



### Banana

Value: 35.0 mil. USD

Decreased **10.1%** compared to Decreased **22.4%** compared to Mar-2025 Decreased **1.3%** compared to

Increased **54.0%** compared to Apr-2024



Mango

Value: 30.0 mil. USD

Increased 16.2% compared to Mar-2025

Increased **5.4**% compared to Apr-2024



### Jackfruit

Value: 25.5 mil. USD

Increased **0.6**% compared to Mar-2025

Decreased **51.1%** compared to Apr-2024



Coconut Value: 12.2 mil. USD

Decreased **2.0%** compared to Mar-2025

Increased 97.0% compared to Apr-2024



Mar-2025

Apr-2024

Chilli

Value: 10.6 mil. USD Increased **104.5**% compared to Mar-2025

Increased 2.4% compared to Apr-2024



Watermelon

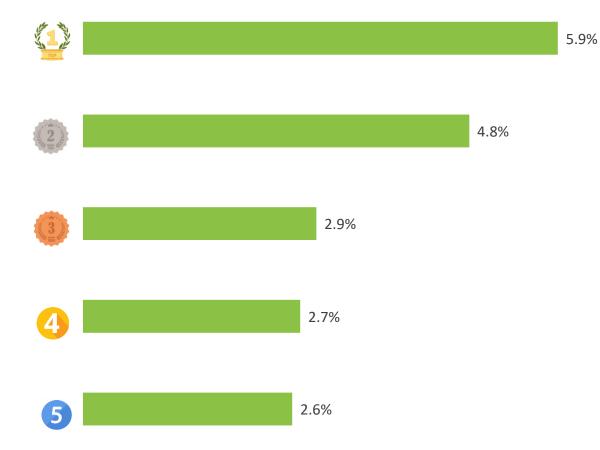
Value: 6.7 mil. USD Decreased 29.8% compared to Mar-2025 Decreased **47.8%** compared to Apr-2024



### **FRUITS & VEGETABLES (EXPORT)**

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

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







# **FRUITS & VEGETABLES (IMPORT)**



# VALUE

**59**.

mil. USD

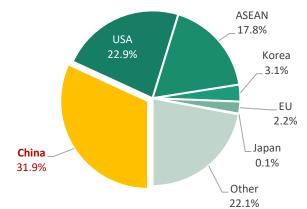
Decreased **17.7**% compared to Mar-2025

Increased 6.2% compared to Apr-2024

**23.3 mil. USD** less than the monthly average rate in 2024

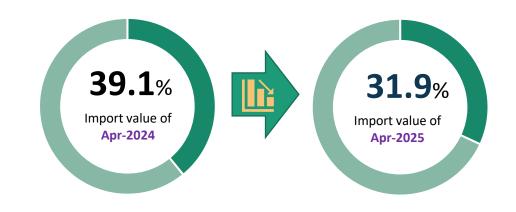
Accumulated 4 months of 2025 reaches **283.6** mil. USD. **28.5%** of total 2024

#### Percentage of import value from China, Apr-2025



Changes in percentage of import value from China, Apr-2025

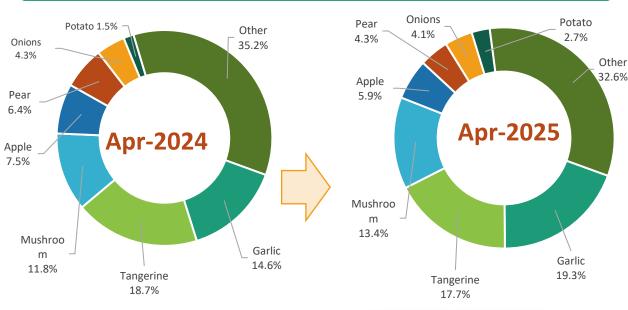
Import results from China, Apr-2025





# **FRUITS & VEGETABLES (IMPORT)**

#### Structure of imports by products from China, Apr-2025





### Apple

Value: 3.5 mil. USD

Decreased **27.3**% compared to Mar-2025

Decreased **15.9**% compared to Apr-2024



Pear

Value: 2.6 mil. USD Decreased 15.3% compared to Mar-2025 Decreased **28.3**% compared to Apr-2024

### Import results of some main products from China, Apr-2025









### Mushroom Value: 8.0 mil. USD

Decreased **24.5**% compared to Mar-2025 Increased **46.4**% compared to Apr-2024

Decreased **5.8**% compared to Mar-2025 Increased **21.0%** compared to Apr-2024



**Onions** 

Apr-2024

Value: 2.4 mil. USD Increased **16.3**% compared to Mar-2025 Increased **0.3**% compared to Apr-2024



Potato

Value: 1.6 mil. USD Increased **8.5**% compared to Mar-2025 Increased 85.2% compared to Apr-2024

### **FRUITS & VEGETABLES**

### **SPOTLIGHTS**





Vietnamese fruits and vegetables receive maximum support from China Customs

On May 28, 2025, during a meeting between Vietnam's Minister of Ministry of Agriculture and Environment and the Director-General of China's General Administration of Customs (GACC), both countries agreed on several measures to maximize facilitation for Vietnamese agricultural exports to China.

China committed to increasing personnel and extending working hours at border checkpoints, as well as establishing a "green channel" specifically for fresh fruits such as durian and lychee. Vietnam implements measures to control agricultural product quality, especially concerning levels of cadmium and the yellow O, to meet China's food safety standards. Additionally, Vietnam requested that China consider and approve additional qualified laboratories capable of analyzing cadmium and yellow O residues, facilitating quality inspections before export.

Source: Nongnghiepmoitruong.vn

### **FRUITS & VEGETABLES**

## **SPOTLIGHTS**





China Approves additional 829 durian growing areas and 131 packaging facilities from Vietnam

China recently approved an additional 829 durian growing area codes and 131 packaging facility codes from Vietnam, bringing the total to 1,469 growing areas and 188 packaging facilities authorized for official export. This represents a positive step toward expanding durian exports to China, which consumes over 90% of Vietnam's exported durian output.

However, China has also tightened technical requirements, particularly regarding food safety and traceability. Issues such as trading and counterfeiting codes persist, posing risks to Vietnam's reputation. Additionally, harvesting durian fruits prematurely— driven by quick profits—has led to customer complaints in China about the fruit's poor texture, impacting the quality, image, and branding of Vietnamese durians in the Chinese market.

Source: Nongnghiepmoitruong.vn

### **FRUITS & VEGETABLES**

## **SPOTLIGHTS**



### China exports first shipment of fresh pears to Argentina

On May 7, 2025, China successfully exported its first shipment of fresh pears—totaling 17.5 tons (2,597 boxes)—to Argentina, valued at approximately 183,000 CNY (around \$25,420). The shipment was conducted by Botou Dongfang Fruit Co., Ltd, a leading pear-exporting enterprise in China, certified as an Authorized Economic Operator (AEO).

Source: Guojiguoshu.com

### China increases to export apple to Russia

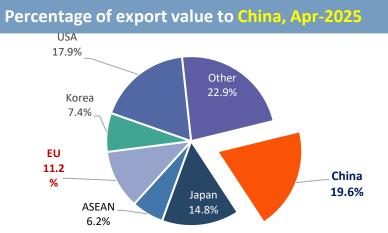
In the first quarter of 2025, the value of China's apple exports to Russia reached \$12.4 million, a 1.5-fold increase compared to the same period last year and marking the highest level since 2019. Russia now ranks 7th among the top importers of Chinese apples, moving up two positions from 2024. Other major import markets include Indonesia (\$38 million), Vietnam (\$37 million), and the Philippines (\$31 million).

Source: Freshplaza.com

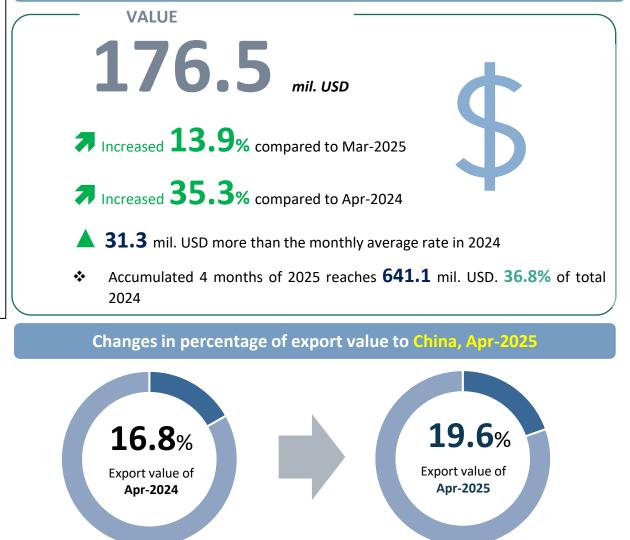








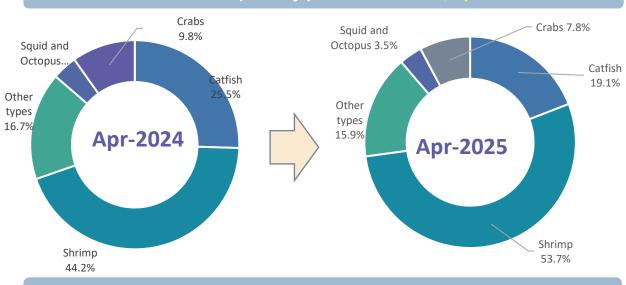
### Export results to China, Apr-2025



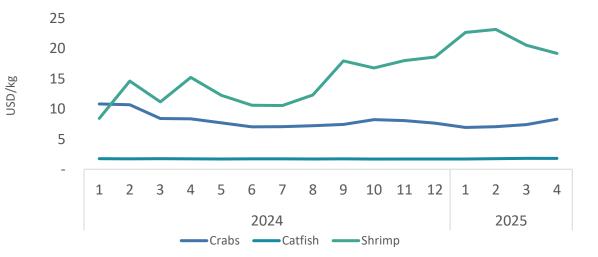


### **FISHERIES**

Structure of exports by products to China, Apr-2025



Average export seafood price to China, Apr-2025



#### Source: Calculated from data of the Department of Customs

#### Seafood exports to China, Apr-2025







Increased **25.4**% compared to

Increased **7.1%** compared to

Value: 13.7 mil. USD

Crabs

Mar-2025

Apr-2024

Catfish Shrimp Value: 33.7 mil. USD Value: 94.9 mil. USD Increased **21.6**% compared to Increased **18.4**% compared to Mar-2025 Mar-2025 Increased 64.6% compared to Increased **1.4**% compared to Apr-2024 Apr-2024

#### Crabs

The average export price in Apr-2025 is 8.3 USD/kg; increased 12.2% compared to the previous month; and decreased 0.7% compared to the

#### Catfish

same month of 2024.

The average export price in Apr-2025 is 1.8 USD/kg; increased 0.2% compared to the previous month; and increased **3.5%** compared to the same month of 2024.

#### Shrimp

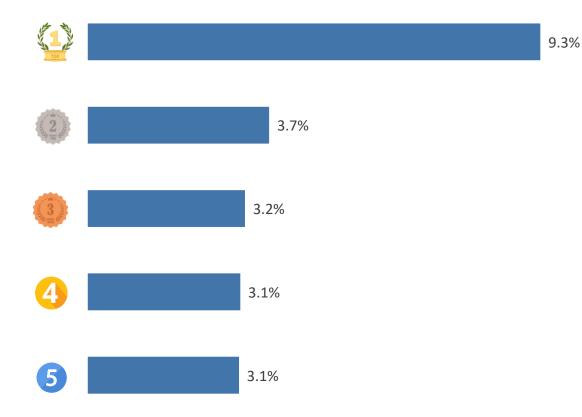
The average export price in Apr-2025 is 19.2 USD/kg; decreased 6.5% compared to the previous month; and increased 26.2% compared to the same month of 2024. (high average price due to large proportion of lobster)

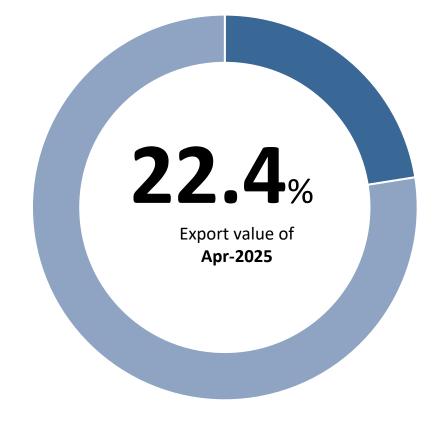




TOP 5 export enterprises by value to China, Apr-2025

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





## **FISHERIES**

# **SPOTLIGHTS**

### China's shrimp imports slightly increase

According to Chinese Customs, China imported 70,067 tons of shrimp, valued at \$356 million in April 2025, up 5% in volume and 6% in value compared to the same period last year. Ecuador continues to lead with a 75% market share, accounting for 52,295 tons. Conversely, India—the second-largest supplier—experienced an 11% decrease to 10,080 tons, marking its fourth consecutive monthly decline due to weak demand for India's headless shrimp. Overall, shrimp imports from India dropped by 21% in the first four months of the year.

Total shrimp imports to China during the first four months reached 269,689 tons, valued at \$1.45 billion, down 9% in volume but slightly up 1% in value, thanks to an average price increase of 11%. The market continues to experience a slowdown due to increased domestic shrimp production and competition from other seafood products.

#### Source: Vasep (May-2025)

### Chinese Tilapia Prices Rise Slightly Following Temporary US Tariff Reduction

After the United States announced a temporary tariff reduction on imports from China for 90 days, tilapia prices in Guangdong increased to 8.7 CNY/kg (approximately \$1.2/kg) for the 500–800g size range during the week starting May 19, 2025. However, prices in Hainan remained steady at 8.0 CNY/kg (\$1.1/kg) as factories aimed to keep costs low.

The U.S. tariff rate on Chinese tilapia decreased significantly from 170% to 55%, partially easing trade barriers. Nevertheless, new orders from the United States remain limited, with the market responding cautiously to the lower tariff rate.

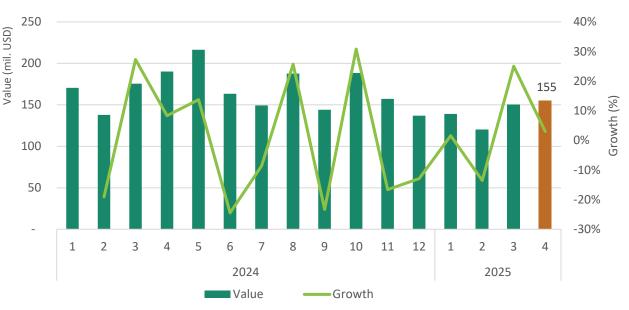




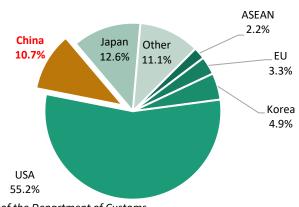


## **WOOD & WOODEN PRODUCTS**

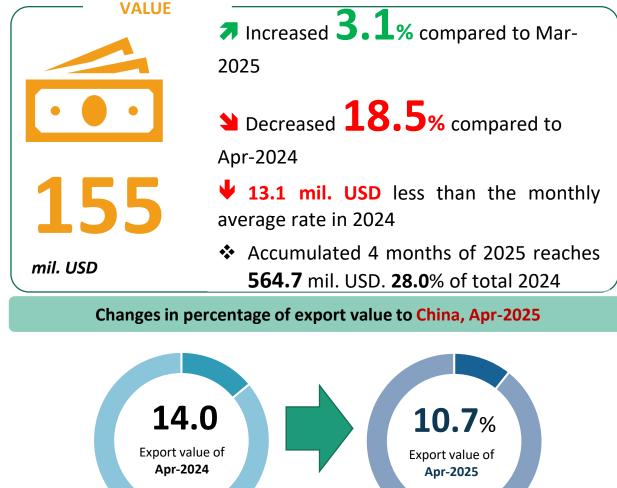
Export volume and value to China, Apr-2025



Percentage of export value to China, Apr-2025



Export results to China, Apr-2025

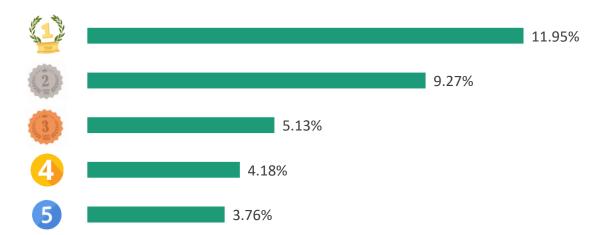




### **WOOD & WOODEN PRODUCTS**

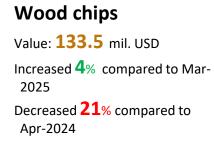
Structure of exports by products to China, Apr-2025 Timber Other 3.1% Other Timber 0.8% Wood slabs 0.8% Wood slabs 7.8% 2.7% Apr-2024 **Apr-2025** Wood chips 88%

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



#### **Export results to China, Apr-2025**







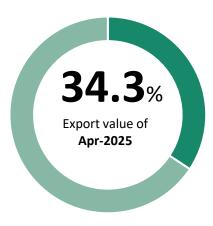
Value: 12.5 mil. USD



Wood slabs

Value: <b>12.5</b> mil. USD	Value: <b>4.0</b> mil. USD
Increased <b>25</b> % compared to Mar-2025	Decreased <b>30</b> % compared to Mar-2025
Decreased <b>113</b> % compared to Apr-2024	Decreased <b>73</b> % compared to Apr-2024

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





### **WOOD & WOODEN PRODUCTS**

## **SPOTLIGHTS**



In the first quarter of 2025, China's total log imports reached 8.07 million m<sup>3</sup>, valued at approximately \$1.352 billion, a decline of 9% in volume and 10% in value compared to the same period last year. Softwood logs accounted for 72% of total imports, decreasing by 7%, whereas hardwood log imports declined by 14%, though their average prices increased by 6%. Notably, imports of tropical logs dropped by 19% in volume and 23% in value, primarily due to weakened domestic demand stemming from a downturn in the real estate sector, policies promoting alternative materials (such as bamboo), the impact of trade tensions with the U.S. and China's cessation of log imports from the U.S. starting April 2025.

Regarding sources, New Zealand remained the largest supplier, representing 52% of total imports despite slight decreases of 2% in volume and 7% in value. While imports from Germany continued to decline, those from Japan, Canada, Latvia, the U.S., France, and Slovakia notably increased. Tropical logs were primarily imported from Papua New Guinea, the Solomon Islands, and the Republic of the Congo, collectively accounting for 76%. The reduction in tropical log imports was further influenced by the Lunar New Year holiday and adjustments in policies favoring sustainable building materials.

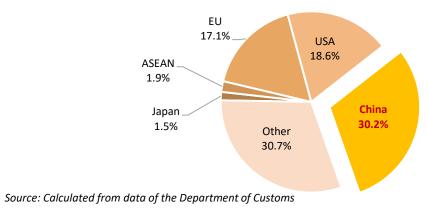






Export value and volume to China, Apr-2025

#### Changes in percentage of export value to China, Apr-2025



### Export results to China, Apr-2025

**149.1** *mil. USD*  **7** Increased **130%** compared to Mar-2025 **7** Increased **111.5%** compared to Apr-2024

VALUE

**87** mil. USD more than the monthly average rate in 2024

Accumulated 4 months of 2025 reaches
258.6 mil. USD. 35% of total 2024

**23.76** *ths. tons*  **7** Increased **127%** compared to Mar-2025

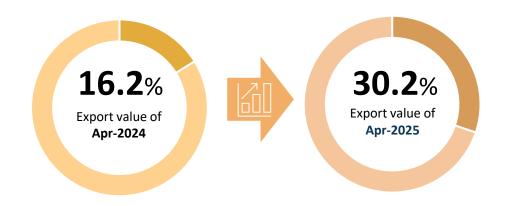
**VOLUME** 

↗ Increased 73% compared to Apr-2024

**13** ths. tons more than the monthly average rate in 2024

Accumulated 4 months of 2025 reaches 13.3
 ths. tons. 33% of total 2024

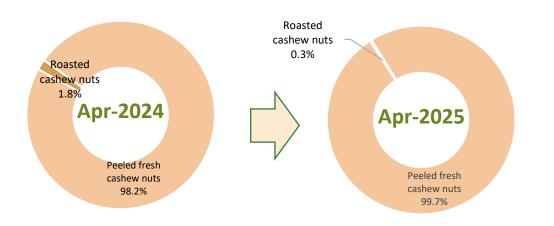
### Changes in percentage of export value to China, Nov-2023



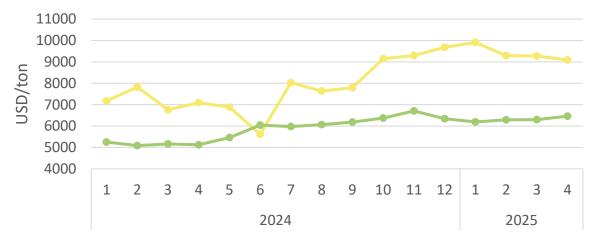


### **CASHEW NUTS**

### Structure of exports by products to China, Apr-2025



Average export cashew nuts price to China, Apr-2025



Roasted cashew nuts — Peeled fresh cashew nuts

#### **Export results to China, Apr-2025**



### Peeled fresh cashew nuts

Value: 148.6 mil. USD

Increased **133**% compared to Mar-2025 Increased **115**% compared to Apr-2024



### **Roasted cashew nuts**

Value: 0.5 mil. USD

Decreased **22**% compared to Mar-2025 Decreased **62**% compared to Apr-2024

#### Peeled fresh cashew nuts

The average export price in Apr-2025 is **6,462** USD/ton; increased **2.6**% compared to the previous month; and increased **26**% compared to the same month of 2024.

#### Roasted cashew nuts

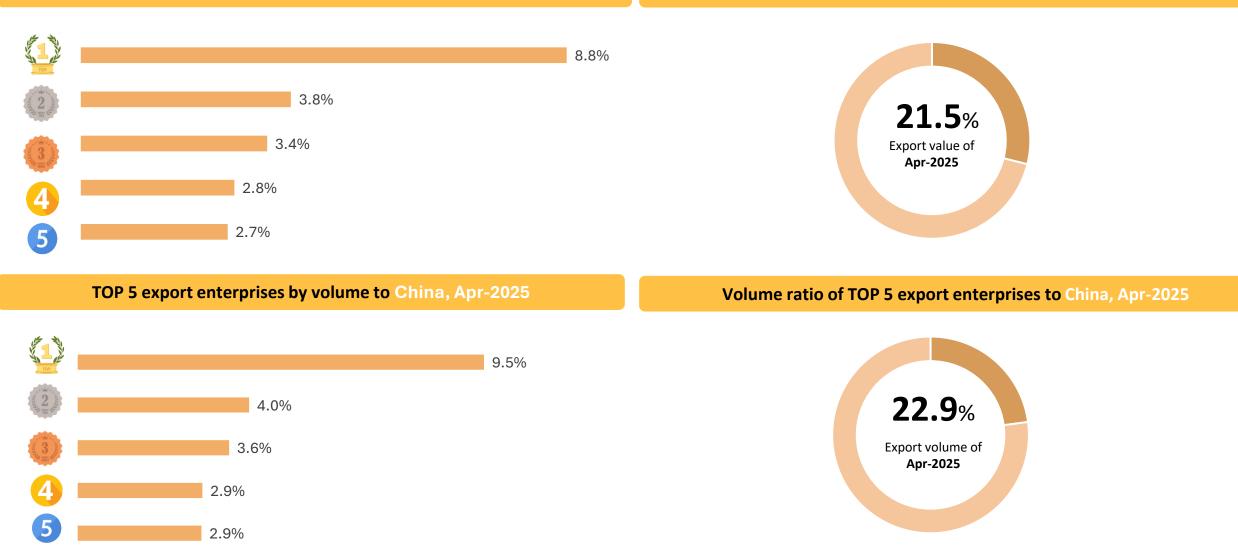
The average export price in Apr-2025 is **9,088** USD/ton; decreased **2.0**% compared to the previous month; and increased **28**% compared to the same month of 2024.





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

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



### **CASHEW NUTS**



# **SPOTLIGHTS**

### Vietnam's cashew nut exports to China significantly increase

In April 2025, China became the largest importer of Vietnamese cashew nuts. The rising demand for cashews in China leads to increase purchase of Chinese traders from Vietnam in recent months. Notably, the export price of cashews to China is higher than to the United States, as Chinese buyers have stricter quality requirements.

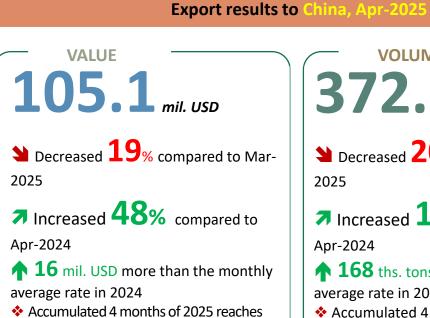
China's growing economy and increasingly busy lifestyles especially among young people—are fueling the demand for snacks in China. Cashews and related products are particularly favored due to their reputation as healthy and nutritious snacks, driving a rapid increase in demand for this item.

Source: Nongnghiepmoitruong.vn



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





455 mil\_USD, 43% of total 2024

372.6<sub>ths. tons</sub> Decreased 20% compared to Mar-

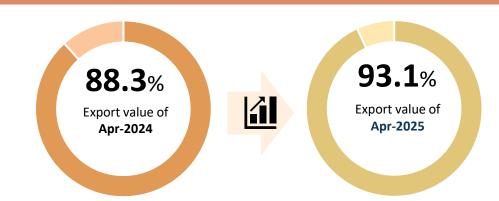
VOLUME

↗ Increased 125% compared to Apr-2024

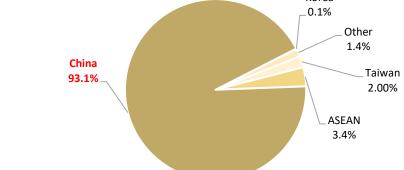
**168** ths. tons more than the monthly average rate in 2024

Accumulated 4 months of 2025 reaches 1 5 trtán. 62.5% of total 2024

### Changes in percentage of export value to China, Apr-2025



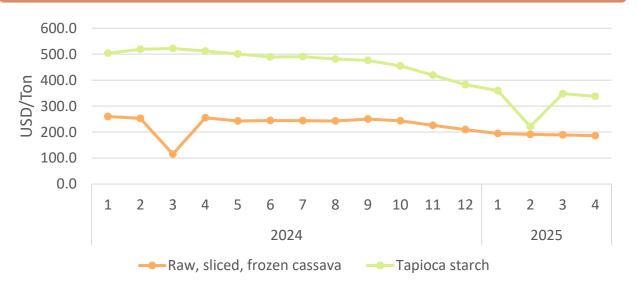
Percentage of export value to China, Apr-2025 Korea \_0.1% Other







#### Percentage of export value to China, Apr-2025



#### **Export results to China, Apr-2025**



Raw. sliced. frozen cassava Value: 25.4 mil. USD Decreased 33.5% compared to Mar-2025 Increased 13.5% compared to Apr-2024



Tapioca starch Value: 79.6 mil. USD Decreased 13.1% compared to Mar-2025 Increased 57.7% compared to Apr-2024

#### Tapioca starch

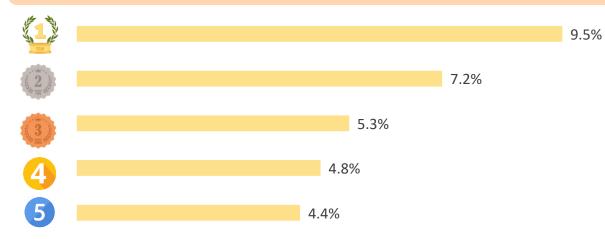
The average export price in Apr-2025 is **338** USD/ton; decreased **3%** compared to the previous month; and decreased **34%** compared to the same month of 2024.

#### Raw. sliced. frozen cassava

The average export price in Apr-2025 is **186** USD/ton; decreased **1.6%** compared to the previous month; and decreased **2.9%** compared to the same month of 2024.



TOP 5 export enterprises by value to Volume ratio of TOP 5 export enterprises to China, Apr-2025



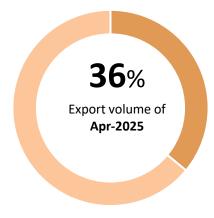
TOP 5 export enterprises by volume to China, Apr-202



**30.1%** Export value of Apr-2025

Value ratio of TOP 5 export enterprises to

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





# **SPOTLIGHTS**

China increases to import cassava starch and dried cassava chips in the first four months of 2025

### **Cassava starch:**

In the first four months of 2025, China imported nearly 1.92 million tons of cassava starch, an increase of 39.7% compared to the same period last year, despite the import value slightly decreasing by 2.7%. Vietnam remained the largest supplier with a strong increase of 77.3%, reaching 945,200 tons, while imports from Thailand rose by only 10.61%. In April 2025, China imported 470,500 tons of cassava starch (up 27.6%), with Vietnam accounting for over 42% of the total and growing by nearly 89%, whereas Thailand's exports declined by more than 25%.

### **Dried cassava**

In the first four months of 2025, China imported 1.94 million tons of dried cassava chips, valued at \$376 million, representing increases of 77.69% in volume and 31.51% in value compared to the same period last year. Thailand and Vietnam are the two main suppliers, accounting for over 98% of total imports, with both countries seeing growth rates of over 75%. In April 2025, China imported 713,100 tons of dried cassava chips, nearly doubling year-on-year. Imports from Thailand rose by 97.15%, and from Vietnam by 105%.

# **SPOTLIGHTS**



Chinese enterprise invests 110 million USD to build large-scale cassavabased paper mill in Tanzania

Goodwill Tanzania, a Chinese-owned company headquartered in Dar es Salaam, Tanzania, has announced an investment of approximately \$110 million to build a large-scale cassava-based paper mill in Mkiu Village, Mkuranga District, in Tanzania's coastal region. The new facility will produce many type of paper products using locally sourced cassava, including high-quality ceramic transfer paper, tissue paper, and environmentally friendly "green" paper.

The plant is currently under construction and expected to begin operations in May 2026. Initially, it will require around 50,000 tons of cassava per year, with demand projected to rise to 300,000 tons annually, aiming to help revitalize Tanzania's cassava industry.

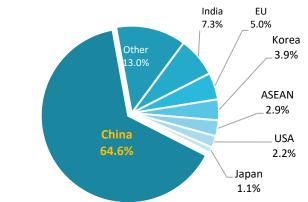
Source: News.cn



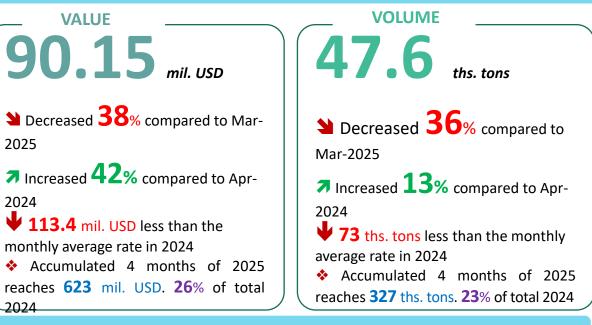
Export volume and value to China, Apr-2025



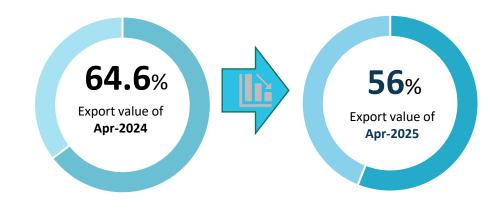
Percentage of export value to China, Apr-2025



**Export results to China, Apr-2025** 

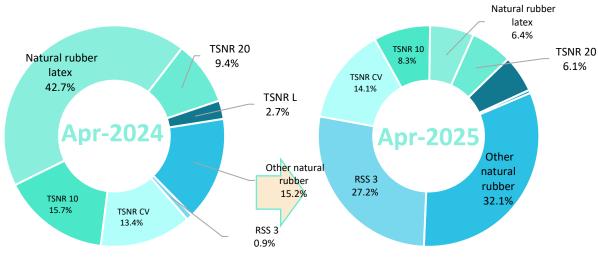


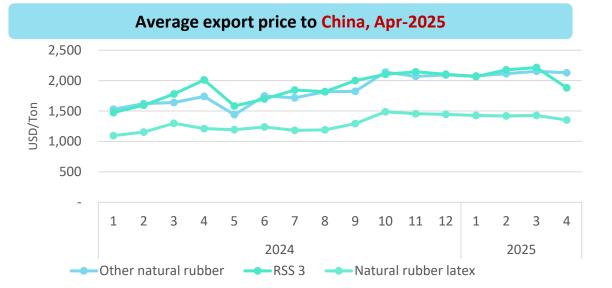
#### Changes in percentage of export value to China, Apr-2025





Structure of exports by products to China, Apr-2025





#### Export results to China, Apr-2025







Natural rubber latex	RSS 3	Other natural rubber
Value: <b>5.8</b> mil. USD	Value: 24.5 mil. USD	Value: 28.9 mil. USD
Decreased <mark>76</mark> % compared to Mar-2025	Increased <b>11</b> % compared to Mar-2025	Decreased <b>37</b> % compared to Mar-2025
Decreased <b>78</b> % compared to Apr-2024	Increased <b>4218</b> % compared to Apr-2024	Increased <b>200</b> % compared to Apr-2024

#### Natural rubber latex

The average export price in Apr-2025 is **1,353** USD/ton; decreased **0.6%** compared to the previous month; and increased **12%** compared to the same month of 2024.

#### RSS 3

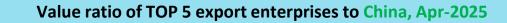
The average export price in Apr-2025 is **1,932** USD/ton; decreased **15%** compared to the previous month; and decreased **6.4%** compared to the same month of 2024.

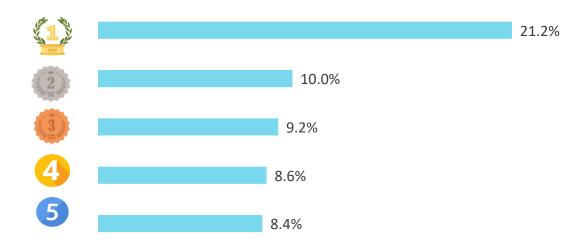
#### Other natural rubber

The average export price in Apr-2025 is **2,129** USD/ton; decreased **1.1%** compared to the previous month; and increased **15.3%** compared to the same month of 2024.

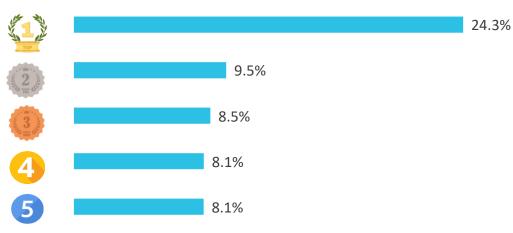


TOP 5 export enterprises by value to China, Apr-2025



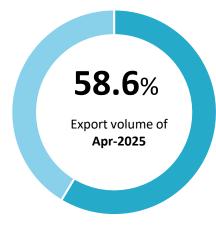


TOP 5 export enterprises by volume to China, Apr-2025





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





### **SPOTLIGHTS**

### China–Cambodia rubber manufacturing facility inaugurated

On May 8, 2025, the China–Cambodia Rubber Manufacturing Facility was officially inaugurated in Nanning, the capital of the Guangxi Zhuang Autonomous Region in southern China. Located within the Nanning Comprehensive Linkage Zone, the facility area is 7,500 m<sup>2</sup> and includes a rubber mixing production line with an annual capacity of 24,000 tons, a research and development (R&D) center, and logistics warehouse space. The project is funded by Cambodian and Thai partners, with a team of Thai experts providing on-site technical and managerial support.

By 2026, the facility is projected to reach an industrial production value of 1.08 billion CNY (approximately \$149.8 million USD) and contribute over 54 million CNY (about \$7.5 million USD) in tax revenue. The Nanning government hopes this facility will become a strategic hub for rubber processing and commodity trading, strengthening links with ASEAN markets in the near future.







### **SPOTLIGHTS**

### **Africa's "White Gold" – Chinese technology boosts Ivory Coast's rubber Industry**

The Chinese corporation Meilian is playing a key role in developing the rubber industry in Ivory Coast - the Africa's largest rubber producer. Meilian has operated three rubber processing plants with a combined current capacity of 300,000 tons/year, expected to reach 480,000 tons/year by the end of 2025. These factories use Chinese technology to enhance production efficiency—from latex collection to final processing that meets international standards—while bringing practical benefits to local communities such as reduced transport costs, higher incomes, and local job creation.

Additionally, Meilian invested in advanced wastewater treatment systems and developed low-emission production technologies, contributing to a greener, more sustainable rubber industry. Thanks to this cooperation, "white gold" is creating new pathways to prosperity for Ivorian farmers and contributing to regional economic growth.



Any comments. please send to:

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