

Volum: June-2025

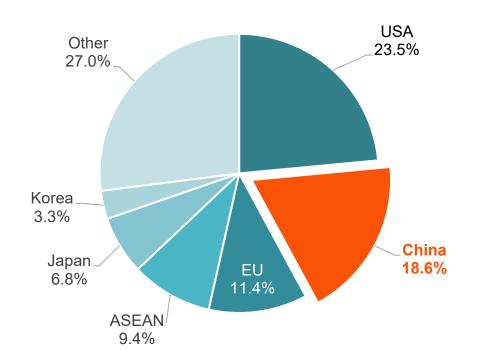
### MONTHLY REPORT ON AGRI-PRODUCT EXPORT

# FROM VIETNAM TO CHINA MARKET



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

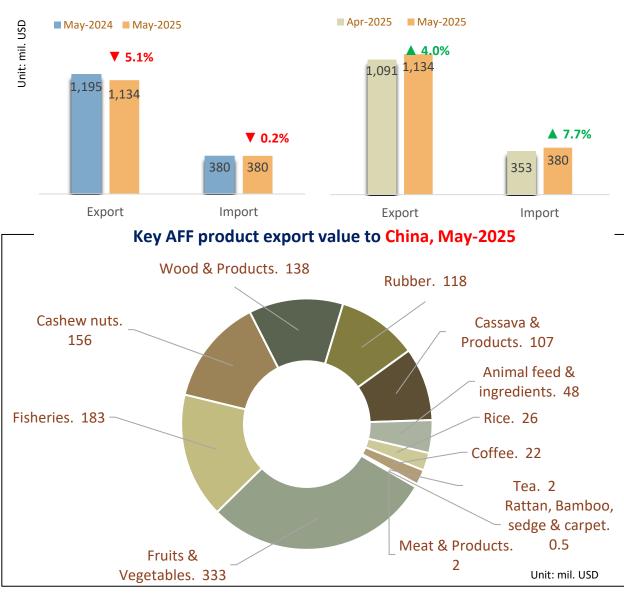
Changes in percentage of AFF product export value to the China, May-2025 compared to Apr-2025 and May-2024

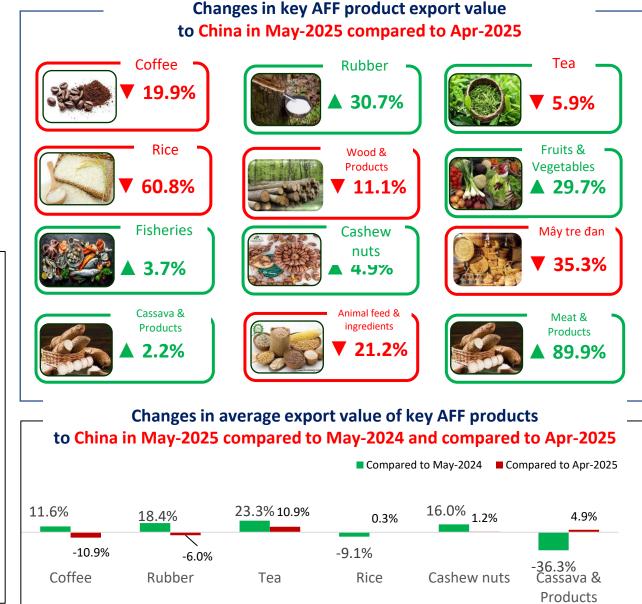


Market	Value (mil. USD)	Compared to Apr-2025	Compared to May-2024
USA	1.434	▲ 2.8%	▲ 2.4%
China	1.134	▲ 0.6%	▼ 4.3%
EU	696	▼ 0.7%	▲ 3.8%
ASEAN	576	▼ 0.5%	▼ 2.3%
Japan	413	▼ 0.1%	▲ 0.3%
Korea	200	▼ 0.2%	▼ 0.6%
Total export	6.101		

#### THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO CHINA IN MAY-2025

#### AFF product import-export turnover between Vietnam and China, May-2025





# China's Exports Slowed in May

In May 2025, China's exports increased by 4.8% year-on-year, but this growth was lower than expectations and one in April. Notably, exports to the United States plummeted by 34.5%, following a 21% decline in the previous month, despite the recently reached "tariff truce" agreement. Imports from the U.S. also dropped by 18.1%, indicating that bilateral trade relations have yet to improve.

Meanwhile, exports to Europe and ASEAN countries continued to grow positively by more than 10%—helping China maintain a high trade surplus of USD 103.2 billion.

However, overall imports fell by 3.4%, and the Consumer Price Index (CPI) decreased

by 0.1%—marking the fourth consecutive month of decline—reflecting weak domestic demand and the risk of deflation.



Source: Nguoiquansat.vn

# China's Manufacturing Activity Declines in the Third Consecutive Month

China's manufacturing activity continued to decline in June, marking the third consecutive month with the Purchasing Managers' Index (PMI) remaining below the threshold of 50.

New orders showed signs of recovery, rising to 50.2 points, but inventories and labor in the manufacturing sector remained noticeably weak. Meanwhile, the construction and services sectors were more positive, with their PMI increasing from 50.3 to 50.5 points.



Regarding exports, the new export order index rose to 47.5 points thanks to some positive signals following the tariff

reduction agreement with the U.S. in May. However, exports to the U.S. still dropped sharply by 34.5% year-on-year in May. Experts attributed the continued weakness to sluggish domestic demand and persistent overcapacity.

In a speech at the World Economic Forum (WEF) in Tianjin on June 26, Chinese Premier Li Qiang stated that Beijing is continuing its efforts to boost domestic demand and transform China into a "consumer powerhouse."



Source: Vnexpress.net



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

Export volume and value to China, May-2025





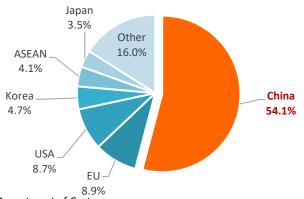
mil. USD

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

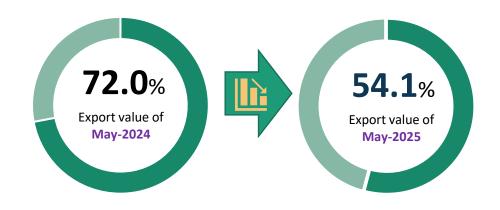
Increased **29.7**% compared to Apr-2025 Decreased **39.7**% compared to May-2024 **52.6 mil. USD** less than the monthly

average rate in 2024 Accumulated 5 months of 2025 reaches **1.1** billion USD, **24.0%** of total 2024

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



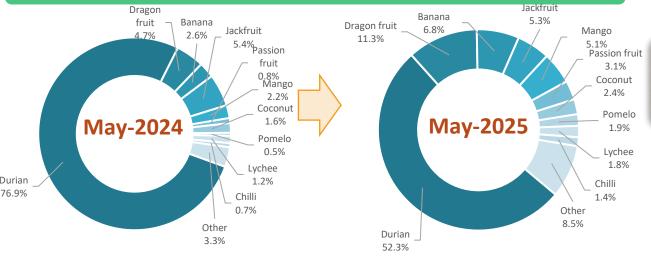
Changes in percentage of export value to China, May-2025





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

Structure of exports by products to China, May-2025





#### Durian

Value: 174.3 mil. USD Increased 202.5% compared to Apr-2025

Decreased **59.0%** compared to May-2024



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

#### **Dragon fruit**

Value: 37.8 mil. USD Decreased **2.2%** compared to Apr-2025

Increased **44.5**% compared to May-2024



#### Banana

Value: 22.7 mil. USD

Decreased **35.0%** compared to Apr-2025

Increased **56.8%** compared to May-2024



#### Jackfruit

Value: 17.8 mil. USD Decreased **30.2%** compared to Apr-2025 Decreased **40.8%** compared to

May-2024



#### Mango

Value: 17.0 mil. USD

Decreased 43.2% compared to Apr-2025

Increased **42.0%** compared to May-2024



**Passion fruit** Value: 10.3 mil. USD Increased **101.4%** compared to Apr-2025

Increased **119.5%** compared to May-2024



Coconut Value: 8.1 mil. USD

Decreased **33.8%** compared to Apr-2025

Decreased **9.8%** compared to May-2024



**Pomelo** 

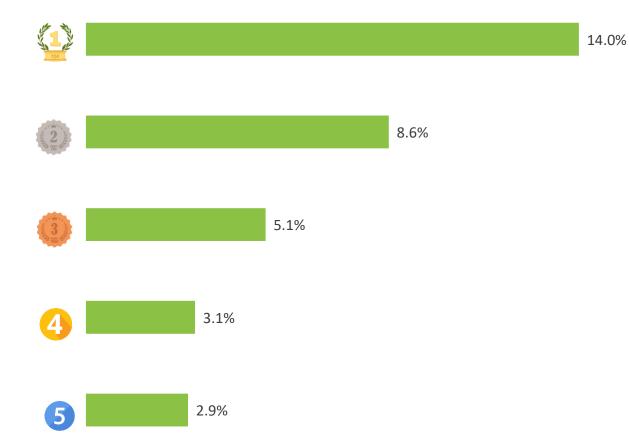
Value: 6.2 mil. USD Decreased **2.9%** compared to Apr-2025 Increased **117.9%** compared to May-2024

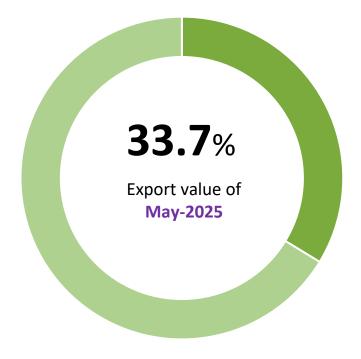


### **FRUITS & VEGETABLES (EXPORT)**

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

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







## **FRUITS & VEGETABLES (IMPORT)**



# VALUE

55.0 mil. USD

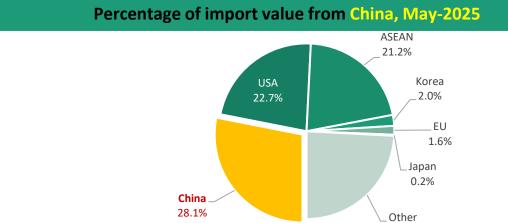
Import results from China, May-2025

Decreased **7.6**% compared to Apr-2025

Decreased **12.9**% compared to May-2024

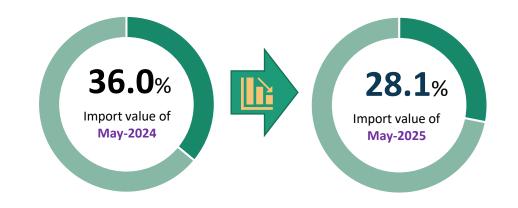
27.8 mil. USD less than the monthly average rate in 2024

Accumulated 5 months of 2025 reaches 338.6 mil. USD, 34.1% of total 2024



24.2%

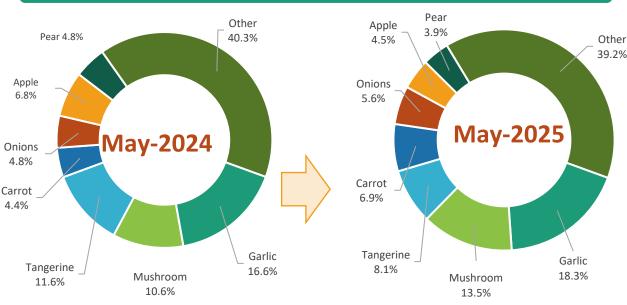
Changes in percentage of import value from China, May-2025





# **FRUITS & VEGETABLES (IMPORT)**

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





#### Carrot

Value: 3.8 mil. USD

**15.5** times compared to Apr-2025

Increased **35.3**% compared to May-2024

Onions

Value: **3.1** mil. USD Increased **27.1**% compared to Apr-2025 Increased **2.0**% compared to May-2024

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









#### Mushroom Value: 7.4 mil. USD Decreased 7.4% compared to Apr-2025 Increased 10.6% compared to May-2024

Tangerine Value: 4.4 mil. USD Decreased 57.7% compared to Apr-2025 Decreased 39.3% compared to May-2024



Apple

Value: 2.5 mil. USD

Decreased **30.2**% compared to Apr-2025

Decreased **42.4**% compared to May-2024



Pear

Value: 2.2 mil. USD Decreased 15.4% compared to Apr-2025 Decreased 28.6% compared to May-2024

### **FRUITS & VEGETABLES**

### **SPOTLIGHTS**





#### Hainan's durian output expected to reach 1,000 tons

Currently, durian cultivation in China mainly relies on imported varieties, as domestic cultivars have yet to be bred and widely adopted. To address this, the Fruit Research Institute under the Hainan Academy of Agricultural Sciences has collected over 60 high-quality genetic sources from Malaysia, Thailand, Vietnam, and other countries. The institute is applying techniques such as crossbreeding and radiation-induced mutation to select varieties with strong climate resilience and high quality.

Durian in Hainan enters the harvest season from late June. The estimated output is over 1,000 tons—double that of last year. The total durian cultivation area in Hainan is about 50,000 mu (approximately 3,333 hectares), with around 667 hectares currently haversting fruit.

Source: Guojiguoshu.com

### **FRUITS & VEGETABLES**

### **SPOTLIGHTS**





#### Vietnam Exports the First Shipment of Frozen Durian to China

On June 3, 2025, Vietnam officially exported the first shipment of frozen durian—over 22 tons from Lam Dong Province—to China via the Bac Luan II border gate. The durians were treated using rapid freezing technology, reaching minus 18°C with liquid nitrogen, which extends shelf life and facilitates long-distance transportation and long-term preservation.

Earlier, on May 28, Vietnam's Minister of Agriculture and Environment discussed with the Director-General of China Customs to resolve obstacles in the export of agricultural, forestry, and fishery products—particularly durian. So far, the two countries have signed 28 agreements related to agricultural trade. Frozen durian is currently favored by Chinese consumers and food processing companies, opening a new development path for Vietnamese agricultural products in the international market.

Source: Vtv.vn

### **FRUITS & VEGETABLES**

## **SPOTLIGHTS**





#### China's Durian-Growing Regions Suffer Major Damage from Typhoon Wutip

Typhoon Wutip made landfall in southern Hainan Island in mid-June— the durian harvest season was approaching—causing severe damage in areas such as Sanya, Ledong, and Baoding. Many trees were uprooted or broken, and fruits fell in large quantities. In Baoding alone, more than 40 six-year-old durian trees were uprooted. Currently, the province has about 40,000 mu of durian (approximately 2,667 hectares), with harvesting expected to begin in late June. However, the yield may be significantly affected following the storm.

#### China's durian imports drop in the first five months of the year

In the first five months of 2025, China's fresh durian imports dropped sharply due to stricter border inspections, particularly regarding pesticide residue levels. Import value fell by 32.5% to USD 1.93 billion, while volume declined by 32.9% to 390,900 tons. Vietnam was the most heavily affected, with both value and volume falling by nearly 62%, reaching only USD 254 million. Thailand remained the top supplier but also saw a 24% decrease. Exporters will need time to adapt to China Customs' new standards. Durian continues to be a premium product in China, especially favored by the middle class and as a popular gift during holidays.

Source: Vietnambiz.vn

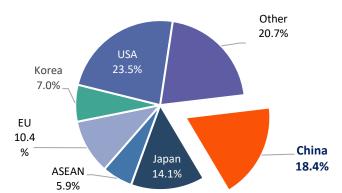




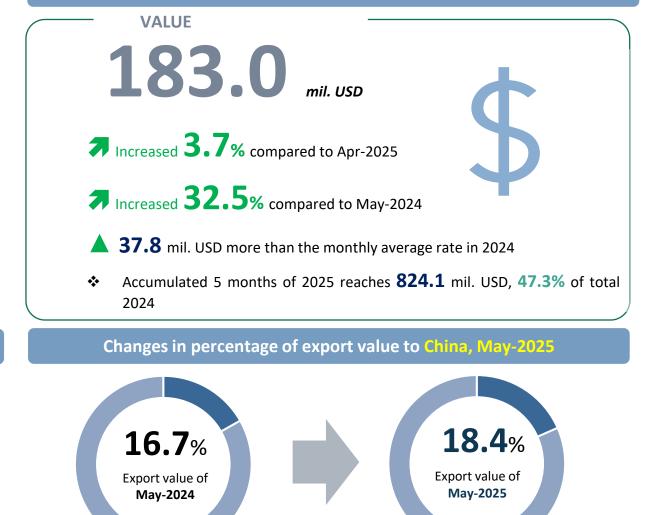
Export volume and value to China, May-2025



Percentage of export value to China, May-2025



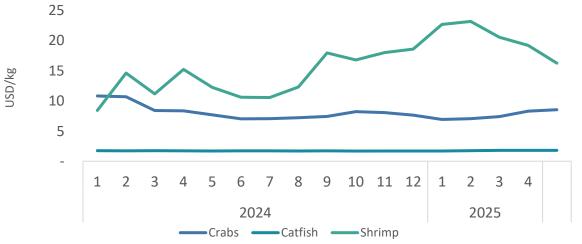
Export results to China, May-2025





### **FISHERIES**

Structure of exports by products to China, Nay-2025 Squid and Crabs Crabs 8.3% Octopus 4.5% 7.6% Squid and Octopus. Catfish Other Other 19.6% atfish types types 29 1% 15.1% 13.7% May-2024 May-2025 Shrimp Shrimp 53.9% 43.9% Average export seafood price to China, May-2025



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

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







Shrimp Value: 98.7 mil. USD Increased **4.1**% compared to Increased 6.2% compared to Apr-2025 Increased 62.8% compared to Decreased **11.0%** compared May-2024

Crabs Value: 15.2 mil. USD Increased **10.5**% compared to Apr-2025 Increased **44.9**% compared to May-2024

#### Crabs

to May-2024

Value: 35.8 mil. USD

Catfish

Apr-2025

The average export price in May-2025 is 8.5 USD/kg; increased 2.9% compared to the previous month; and increased 11.1% compared to the same month of 2024

#### Catfish

The average export price in May-2025 is **1.8** USD/kg; increased **0.4**% compared to the previous month; and increased 5.9% compared to the same month of 2024

#### Shrimp

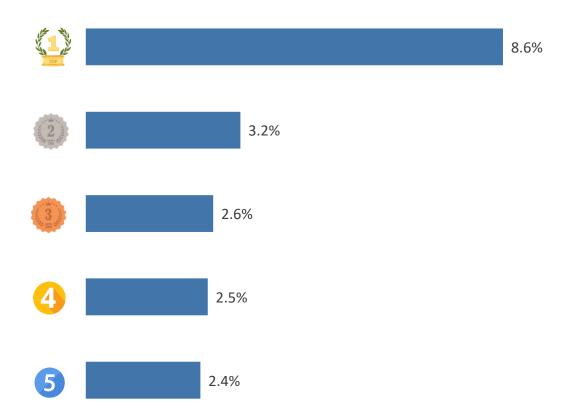
The average export price in May-2025 is **16.3** USD/kg; decreased 15.3% compared to the previous month; and increased 32.7% compared to the same month of 2024 (high average price due to large proportion of lobster)

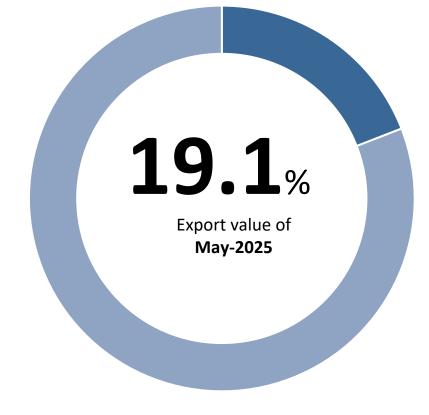




TOP 5 export enterprises by value to China, May-2025

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





# **FISHERIES**

# **SPOTLIGHTS**

#### China Lifts Ban on Japanese Seafood Imports After Nearly Two Years

On June 30, 2025, China officially lifted its ban on seafood imports from Japan, ending nearly two years of trade disruption caused by concerns over Japan's release of treated wastewater from the Fukushima nuclear power plant into the ocean. The ban, which had been in place since August 2023, was a major blow to Japan's key seafood exports such as scallops and sea cucumbers, as China is the country's largest consumer market.

The resumption of imports comes as both countries are making efforts to improve bilateral relations—particularly amid economic uncertainties arising from new U.S. tariff policies. Japan's Minister of Agriculture, Forestry, and Fisheries, Shinjiro Koizumi, called the move a "significant turning point" for Japan's seafood export sector, which regards China as a strategic market.

Source: APnews

#### China's shrimp imports decline

In the first five months of 2025, China imported a total of 343,787 tons of shrimp, down 7% compared to the same period last year. However, due to rising prices, the import value increased by 2%, reaching USD 1.82 billion.

May 2025 marked the largest month for shrimp imports this year, with 74,097 tons—up 6% from May last year. The import value reached USD 376 million, up 10%. Ecuador remained the leading supplier, accounting for over 70% of market share, followed by India and Thailand..





Source: Vasep

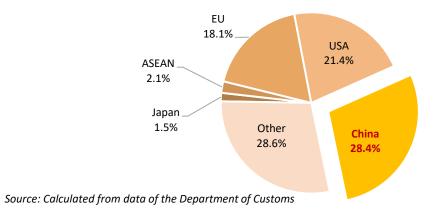


### **CASHEW NUTS**

Value (mil. USD) 160 (mil. USD) 140 120 100 100 30,000 (%) 25,000 guodala 156 20,000 100 15,000 80 60 10,000 40 5,000 20 2 3 5 10 11 12 1 4 6 8 9 1 2 3 4 5 2024 2025 Value — Volume

Export value and volume to China, May-2025

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



### VALUE VOLUME 156.4 mil. USD P Increased 4.9% compared to Apr-2025 Increased 75.3% compared to May-2024 94 mil. USD more than the monthly average rate in 2024

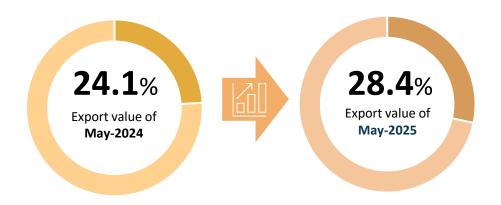
Accumulated 5 months of 2025 reaches 415 tr.USD, 56% of total 2024

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

24.6 ths. tons
Increased 3.7% compared to Apr-2025
Increased 51.1% compared to May-2024
14 ths. tons more than the monthly average rate in 2024

Accumulated 5 months of 2025 reaches 66
 ths. tons. 52% of total 2024

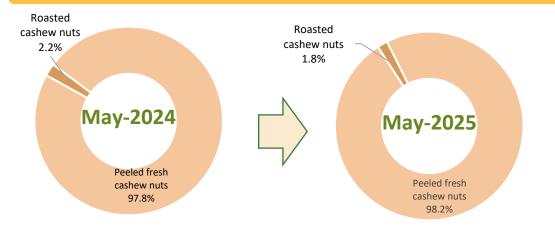
#### Changes in percentage of export value to China, Nov-2023





### **CASHEW NUTS**

#### **Structure of exports by products to China, May-2025**



Average export cashew nuts price to China, May-2025



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



Peeled fresh cashew nuts Value: 153.5 mil. USD Increased 3.2% compared to Apr-2025 Increased 74.2% compared to May-2024



Roasted cashew nuts Value: 2.8 mil. USD Increased 472% compared to Apr-2025 Increased 43.2% compared to May-2024

#### Peeled fresh cashew nuts

The average export price in May-2025 is **6,499** USD/ton; increased **0.6**% compared to the previous month; and increased **19**% compared to the same month of 2024

#### Roasted cashew nuts

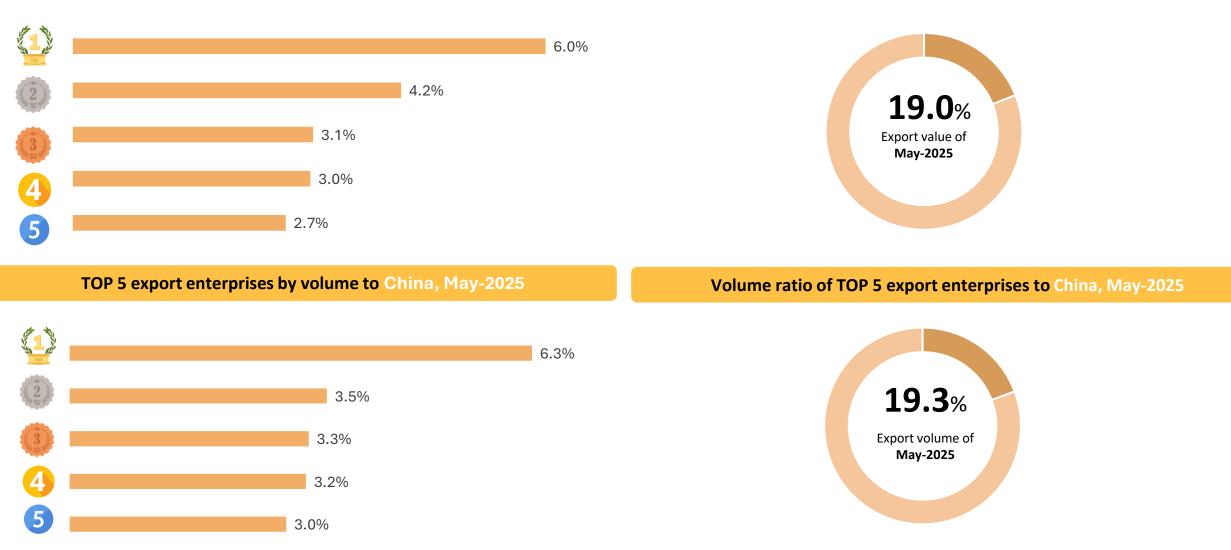
The average export price in May-2025 is **9,186** USD/ton; increased **1.1**% compared to the previous month; and increased **33**% compared to the same month of 2024





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

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



### **CASHEW NUTS**



# **SPOTLIGHTS**

China issues quarantine and sanitary regulations for cashew imports from Gambia

The General Administration of Customs of China issued Notice No. 135 of 2025, officially allowing the import of cashew nuts from Gambia into the Chinese market. This is conditional upon compliance with all inspection, quarantine, and food safety regulations, as stipulated in the bilateral protocol signed between the two countries on June 12, 2025.

Only Gambian enterprises that have been approved by Chinese authorities are eligible to export. The list of approved exporters will be published and publicly accessible on the official website of China's General Administration of Customs.

The issuance of this notice not only confirms China's formal market opening for Gambian cashew nuts but also establishes a stringent system of standards for quality, safety, and quarantine for imports from Gambia.

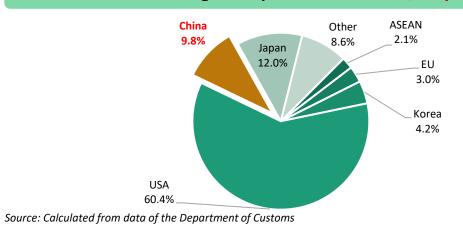
Source: Customs.gov.cn

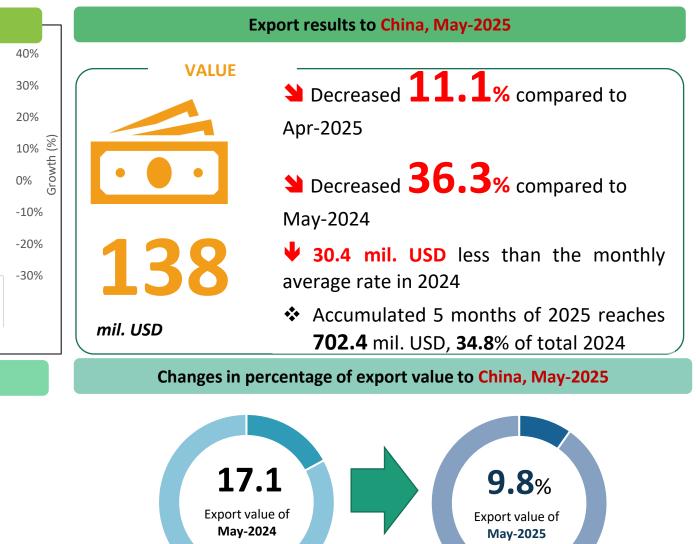


### **WOOD & WOODEN PRODUCTS**

Export volume and value to China, May-2025 40% Value (mil. USD) 30% 20% 10% 0% -10% -20% -30% Value Growth

Percentage of export value to China, May-2025

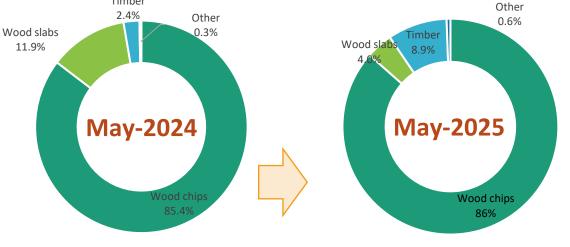




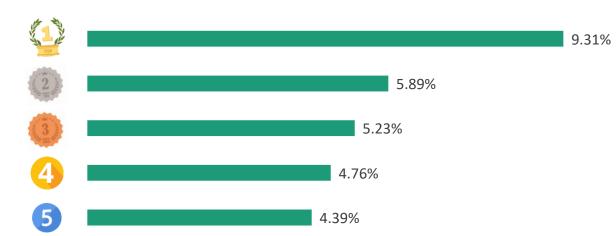


### **WOOD & WOODEN PRODUCTS**

Structure of exports by products to China, May-2025



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



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









Wood slabs

Value: 5.4 mil. USD	
Increased <b>33</b> % compared to Apr-2025	
Decreased <mark>79%</mark> compared to May-2024	

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





#### **WOOD & WOODEN PRODUCTS**

## **SPOTLIGHTS**

Two new national standards of China on wood products officially came into effect on June 1, 2025. The first standard defines the method for determining the total organic carbon content in engineered wood products and finished goods, aiming to provide a scientific basis for accurately measuring carbon storage capacity. The second standard—"Green Product Evaluation for Engineered Wood Panels and Wood Flooring" (GB/T 35601-2024)—outlines the requirements and evaluation methods for green products used in interior spaces. The implementation of these standards is expected to accelerate the transformation and upgrading of production while meeting the growing demand for sustainable consumption.

Source: Itto.int

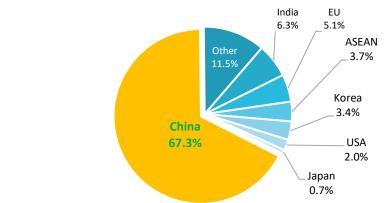
China imported 5.99 million cubic meters of logs and sawn timber in May 2025, equivalent to the same period last year. However, from January to May 2025, total imports reached 24.146 million cubic meters, down 13.3% compared to the same period in 2024. In terms of value, the import turnover in May reached USD 125.5 million, almost unchanged from the same period last year. From the beginning of the year to the end of May, the total import value amounted to USD 48.937 billion, down 15.2% year-on-year.



Export volume and value to China, May-2025

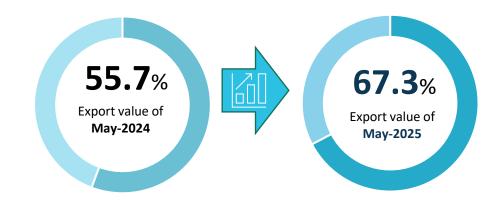


Percentage of export value to China, May-2025



**Export results to China, May-2025** VALUE VOLUME 117.8 66.1 ↗ Increased 39% compared to Apr-↗ Increased 31% compared to Apr-2025 2025 ↗ Increased 31% compared to May-↗ Increased 55% compared to May-2024 2024 **54.5** ths. tons less than the **86** mil. USD less than the monthly monthly average rate in 2024 average rate in 2024 ♦ Accumulated 5 months of 2025 ♦ Accumulated 5 months of 2025 reaches 393 ths. tons. 27.1% of total reaches 741 mil. USD, 30.3% of total 2024 2024

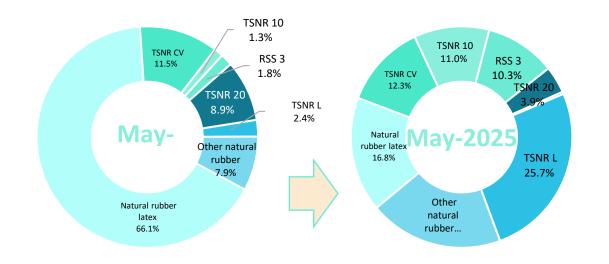
#### Changes in percentage of export value to China, May-2025





# RUBBER

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



Average export price to China, May-2025 2,500 2,000 USD/Ton 1,500 .000 500 10 11 12 5 1 2 3 6 8 9 2 3 1 2024 2025 ---- Other natural rubber ---- RSS 3 -----Natural rubber latex

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

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







Natural rubber latex	RSS 3	Other natural rubber
Value: 19.8 mil. USD	Value: 12.2 mil. USD	Value: 23.1 mil. USD
Increased <b>242</b> % compared to Apr-2025	Increased <b>50</b> % compared to Ap 2025	r-Decreased <mark>20</mark> % compared to Apr-2025
Decreased <b>61</b> % compared to May-2024	Increased <b>801</b> % compared to May-2024	Increased <b>283</b> % compared to May-2024

#### Natural rubber latex

The average export price in May-2025 is **1,278** USD/ton; decreased **5.5**% compared to the previous month; and increased **7.0**% compared to the same month of 2024

#### RSS 3

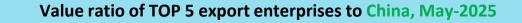
The average export price in May-2025 is **1,930** USD/ton; increased **2.5**% compared to the previous month; and increased **21.4**% compared to the same month of 2024

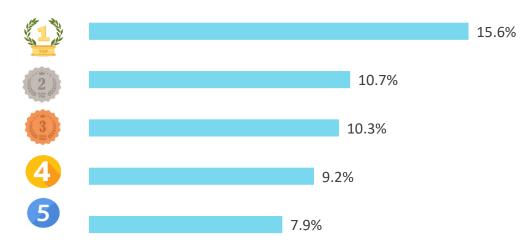
#### Other natural rubber

The average export price in May-2025 is **2,035** USD/ton; decreased **4.4%** compared to the previous month; and increased **6.2%** compared to the same month of 2024

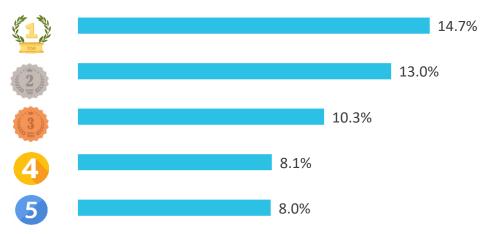


TOP 5 export enterprises by value to China, May-2025

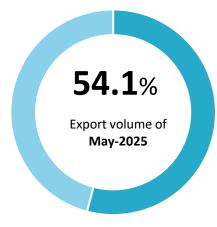




TOP 5 export enterprises by volume to China, May-2025



53.7% Export value of May-2025 Volume ratio of TOP 5 export enterprises to China, May-2025







### **SPOTLIGHTS**

### In May 2025, China Increased to Import Rubber to Meet Industrial Demand, Especially from the Tire Manufacturing Sector

In May 2025, China imported a total of 607,000 tons of natural and synthetic rubber (including latex), a 25.2% increase compared to the same period in 2024 (485,000 tons), continuing the upward trend in recent months. Total imports during five months of the year reached 3,476,000 tons, up 23.5% from the same period in 2024 (2,814,000 tons). In terms of pricing, the average import price of rubber in May slightly declined compared to April 2025.

The continuous increase in rubber imports clearly reflects the growing demand from China's rubberconsuming industries. In particular, the tire manufacturing sector—which accounts for the largest share of rubber consumption—has been expanding its production capacity in recent years, driving up demand for raw materials like rubber.

In Southeast Asia, although latex harvesting activities in some regions were disrupted due to seasonal rains, the region's overall export volume remained stable, helping ensure a supply for China.

Source: Chnrubber.org







# **SPOTLIGHTS**

 Yokohama rubber launches world's first self-healing tire manufacturing technology in China

In the context of increasing global focus on tire supply-demand balance and safety, Yokohama Rubber Company (YRC) announced plans to manufacture the world's first self-healing tires at its factory in Suzhou, China, by the end of 2025. This technology reduces the risk of tire blowouts caused by sharp objects, enhancing vehicle safety.

The project was announced during a signing ceremony for a cooperation agreement with Suzhou University of Science and Technology. YRC will begin investing in the production line in September 2025, with an initial production value exceeding 10 million RMB (approximately USD 1.38 million). At the same time, the two parties will establish a joint laboratory to research and address technical challenges in the sector, aiming to bring practical applications to manufacturing.



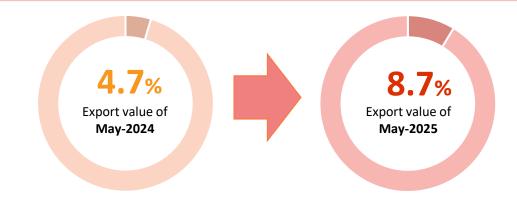
### **MEAT AND MEAT PRODUCTS (EXPORT)**

Export value to China, May-2025

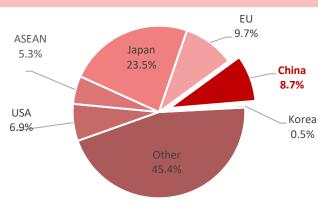




#### Changes in percentage of export value to China, May-2025



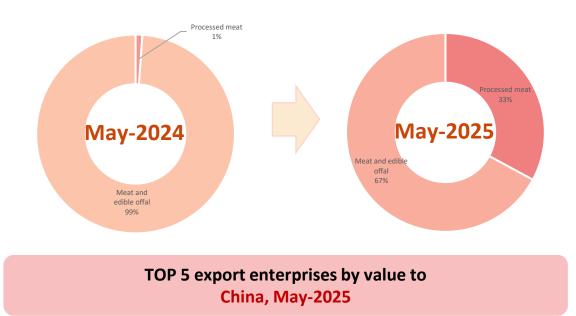
Percentage of export value to China, May-2025

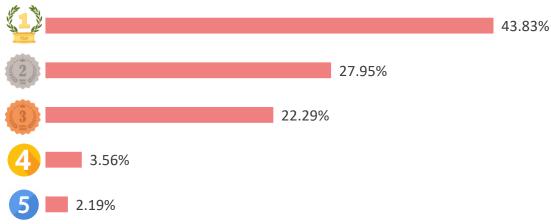




### **MEAT AND MEAT PRODUCTS (EXPORT)**

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





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

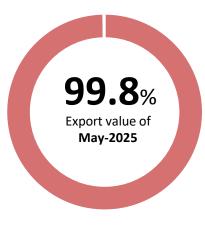


Meat and edible offal Value: 1.19 mil. USD Increased 73% compared to Apr-2025 Increased 44.6% compared to May-2024



Processed meat Value: 582.6 ths. USD Increased 137.5% compared to Apr-2025 Increased 626 times compared to May-2024

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



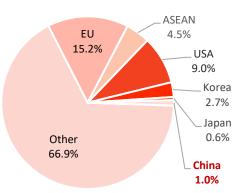


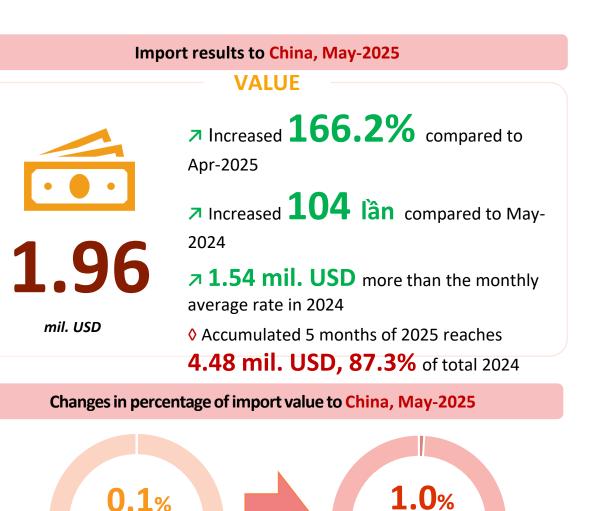
### **MEAT AND MEAT PRODUCTS (IMPORT)**

Import value to China, May-2025



#### Percentage of import value to China, May-2025





Import value of

May-2025

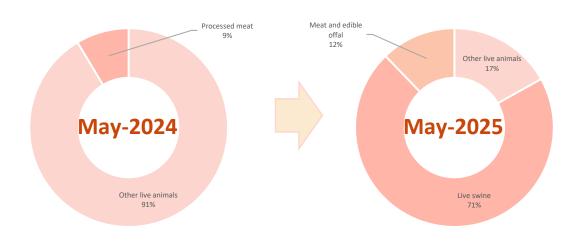
Import value of

May-2024



### **MEAT AND MEAT PRODUCTS (IMPORT)**

#### Structure of imports by products to China, May-2025



#### import results to China, May-2025



Live swine Value: 1.4 mil. USD



Other live animals Value: 240.2 ths. USD Increased 100% compared to Apr-2025



Value ratio of TOP 5 import enterprises to China, May-2025





### **MEAT AND MEAT PRODUCTS**

# **SPOTLIGHTS**



According to the latest quarterly report by Rabobank, pork production in China will increase slightly by 1% to 2% this year.

Imports account for less than 5% of total supply, but China remains the world's largest importer of pork. China's imposition of high tariffs on imported pork offal from the United States may shift sourcing patterns and exacerbate supply shortages, pushing up prices and encouraging smuggling activities via intermediary routes such as Vietnam and Hong Kong.

This shift in trade flows is creating new opportunities for exporters from Latin America and Europe, while U.S. companies face the risk of declining export value and profits.

Source: The Ministry of Industry and Trade



### **MEAT AND MEAT PRODUCTS**

### **SPOTLIGHTS**



According to data from China's Customs Authority, in the first four months of 2025, the country imported 350,090 tons of pork, with a total value of USD 706.24 million—up 3.6% in volume and 7.6% in value compared to the same period in 2024. China's main pork suppliers remained Spain, Brazil, the Netherlands, Canada, the United Kingdom, Chile, the United States, and Denmark. Notably, while most markets recorded positive growth, Brazil was the only country whose pork exports to China declined compared to the same period last year.

Source: The Ministry of Industry and Trade



Any comments. please send to:

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