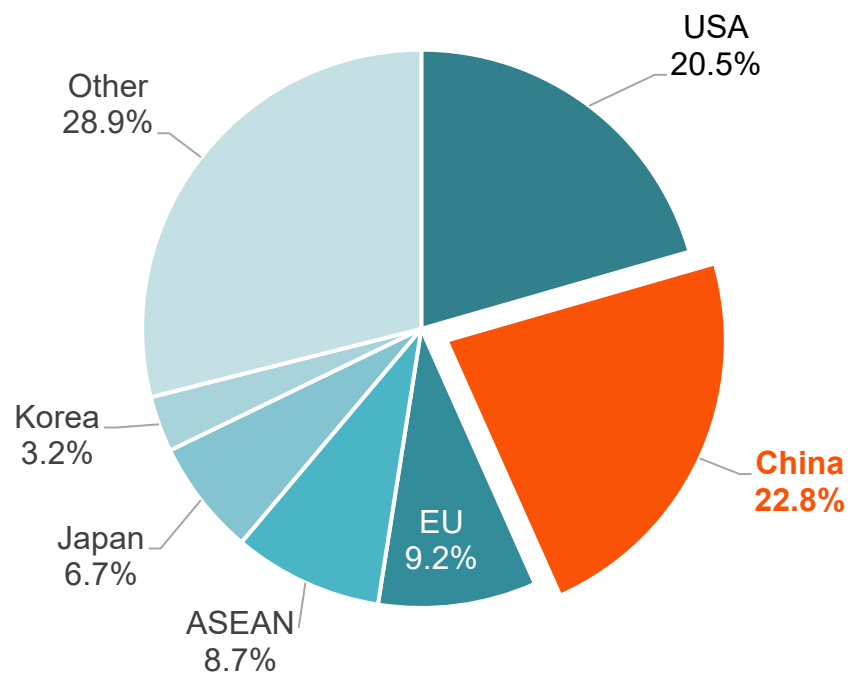


MONTHLY REPORT ON
AGRI-PRODUCT EXPORT
**FROM VIETNAM TO
CHINA MARKET**



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

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



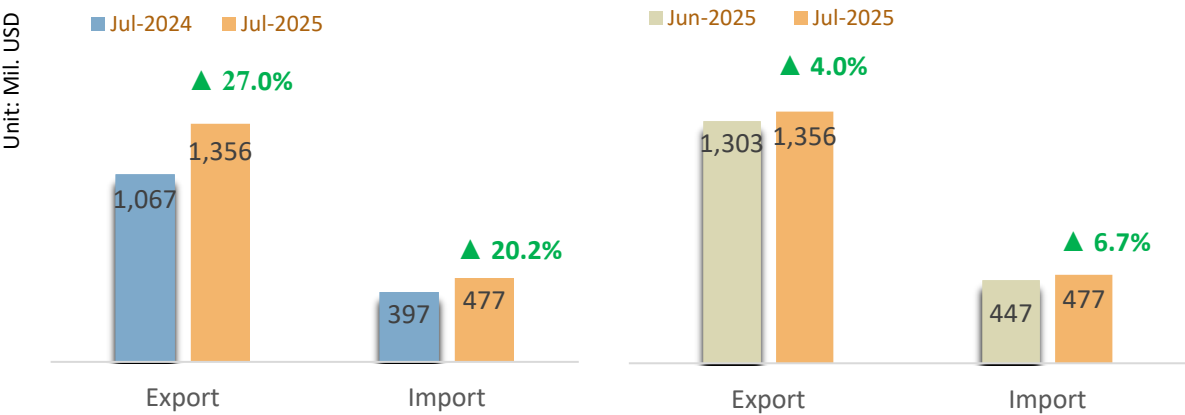
Changes in percentage of AFF product export value to the China, Jul-2025 compared to Jun-2025 and Jul-2024

Market	Value (mil. USD)	Compared to Jun-2025	Compared to Jul-2024
USA	1.222	▲ 0.3%	▼ 3.2%
China	1.356	▲ 0.1%	▲ 2.6%
EU	545	▼ 0.4%	▲ 1.3%
ASEAN	515	▲ 0.2%	▼ 2.9%
Japan	398	▼ 0.4%	▼ 0.2%
Korea	192	▼ 0.1%	▼ 0.5%
Total export value		5.950	

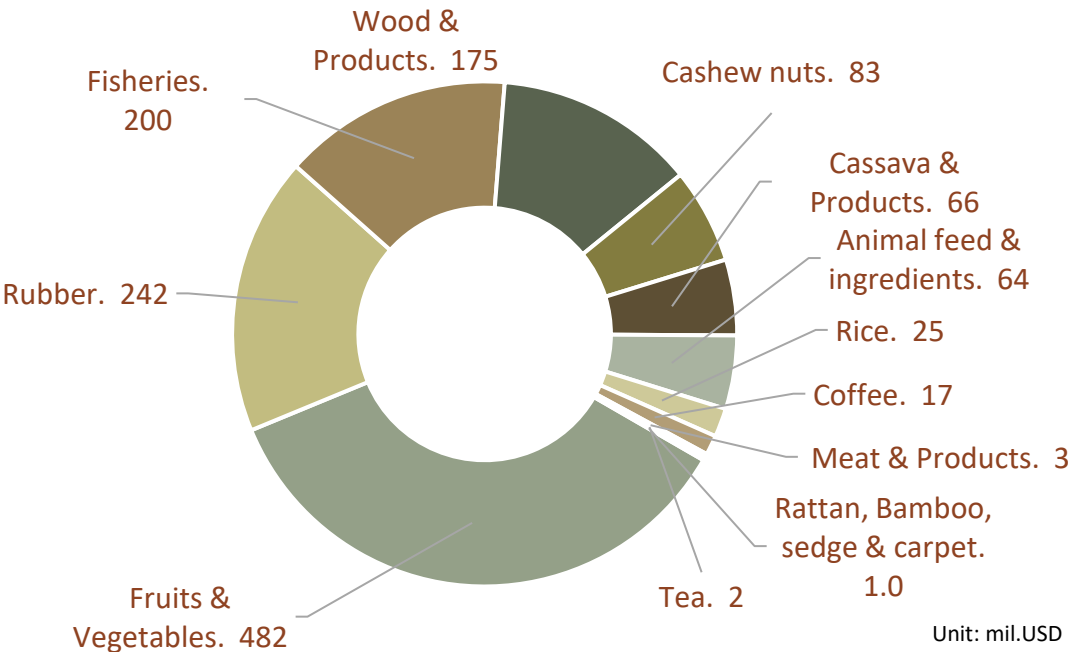
Source: Calculated from data of the Department of Customs

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

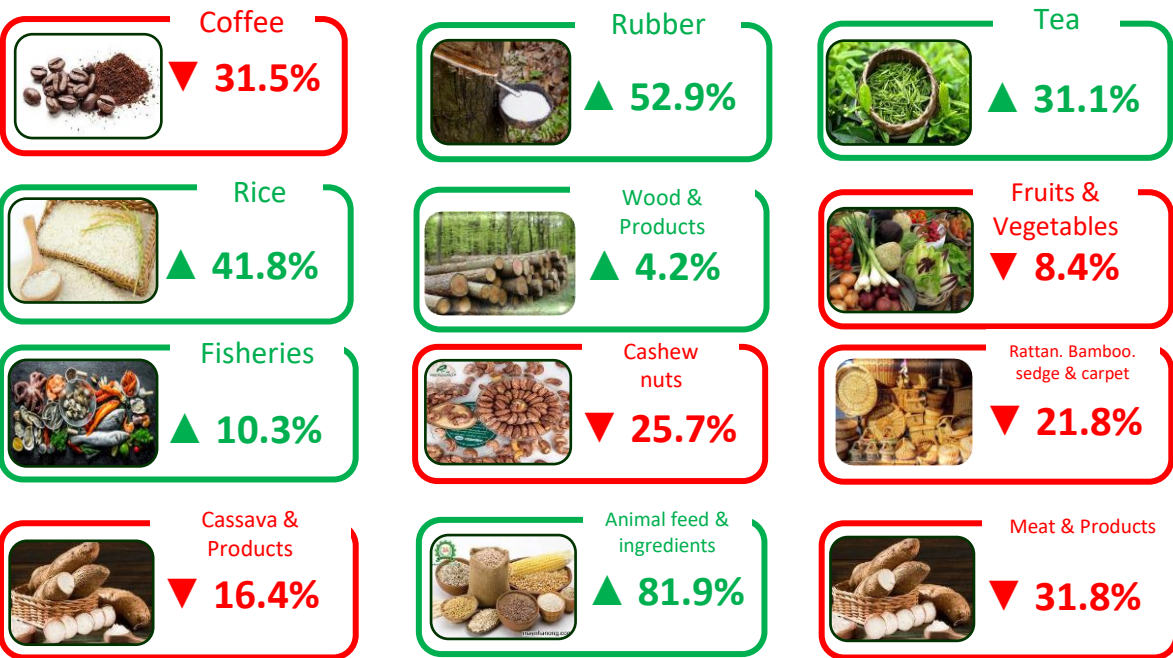
AFF product import-export turnover between Vietnam and China, Jul-2025



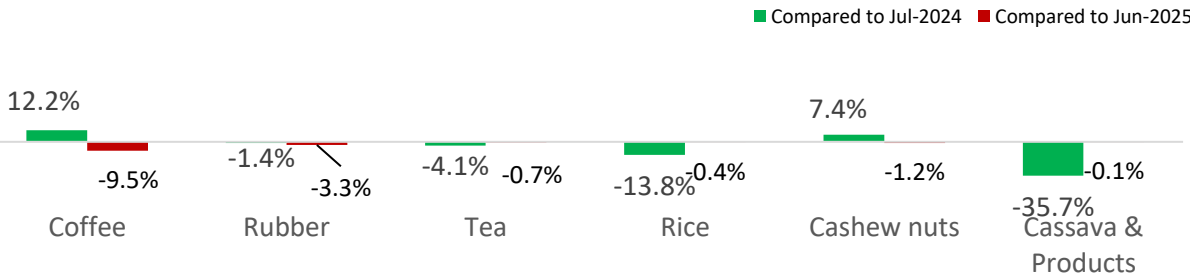
Key AFF product export value to China, Jul-2025



Changes in key AFF product export value to China in Jul-2025 compared to Jun-2025



Changes in average export value of key AFF products to China in Jul-2025 compared to Jul-2024 and compared to Jun-2025



Source: Calculated from data of the Department of Customs

China support to recover agriculture in affected regions by floods & drought

In August 2025, China allocated more than 1 billion Yuan (USD 140 million) to support agriculture in areas affected by floods and droughts. The supported regions include Beijing, Hebei, Inner Mongolia, Guangdong, Shandong, Hubei, and Henan. Henan Province —

known as China's "granary" — received 131.5 million yuan (around USD 18.5 million) to repair irrigation systems and water conservancy projects, ensuring the autumn harvest, which accounts for three-quarters of the nation's grain output.

The Ministry of Agriculture and Rural Affairs of China warned that agriculture production is facing risks from overlapping heatwaves, droughts, and

floods, while issuing 34 measures to mitigate damage and stabilize production.



Source: Reuters.com

China's production declined in August

According to China's National Bureau of Statistics, the country's Purchasing Managers' Index (PMI) was 49.4 in August, remaining below the 50-point threshold and marking the fifth consecutive month of contraction, although the decline slowed compared with July (49.3). Sub-indicators such as production, new orders, and inventories recorded slight increase, while employment continued to fall. In the non-manufacturing sector, the PMI rose from 50.1 to 50.3.

Experts noted that the economic outlook in remained months of the year will largely depend on the sustainability of exports and the level of fiscal policy support in the fourth

quarter. Amid ongoing trade uncertainties—particularly following the 90-day extension of tariff suspension with the United States—China's Vice Minister of Commerce, Li Chenggang, visited the U.S. in late August for bilateral discussions, emphasizing the principle of mutually beneficial cooperation through equal dialogue.



Source: Vnexpress.net





FRUITS & VEGETABLES (EXPORT)

Export volume and value to China, Jul-2025



Export results to China, Jul-2025



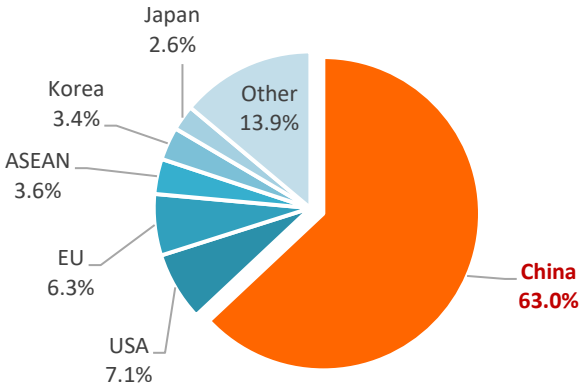
Decreased **8.4%** compared to Jun-2025

Increased **45.7%** compared to Jul-2024

95.9 mil. USD more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **2.1 bil. USD**, **45.6%** of total 2024

Percentage of export value to China, Jul-2025



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

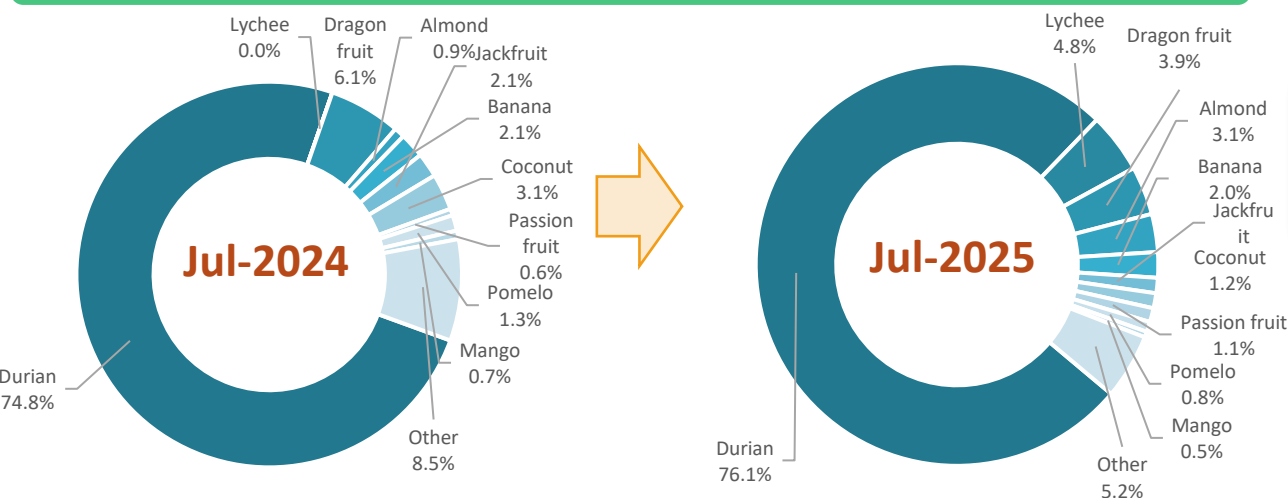


Source: Calculated from data of the Department of Customs



FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to China, Jul-2025



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



Durian

Value: **366.8** mil. USD

Decreased **12.0%** compared to Jun-2025

Increased **48.4%** compared to Jul-2024



Lychee

Value: **23.2** mil. USD

Decreased **15.5%** compared to Jun-2025

890 times compared to Jul-2024



Dragon fruit

Value: **18.8** mil. USD

Increased **23.6%** compared to Jun-2025

Decreased **6.0%** compared to Jul-2024



Almond

Value: **14.7** mil. USD

Increased **235.2%** compared to Jun-2025

Increased **401.0%** compared to Jul-2024



Banana

Value: **9.9** mil. USD

Decreased **23.2%** compared to Jun-2025

Increased **42.8%** compared to Jul-2024



Jackfruit

Value: **5.9** mil. USD

Decreased **16.7%** compared to Jun-2025

Decreased **12.8%** compared to Jul-2024



Coconut

Value: **5.8** mil. USD

Increased **17.2%** compared to Jun-2025

Decreased **42.6%** compared to Jul-2024



Passion fruit

Value: **5.4** mil. USD

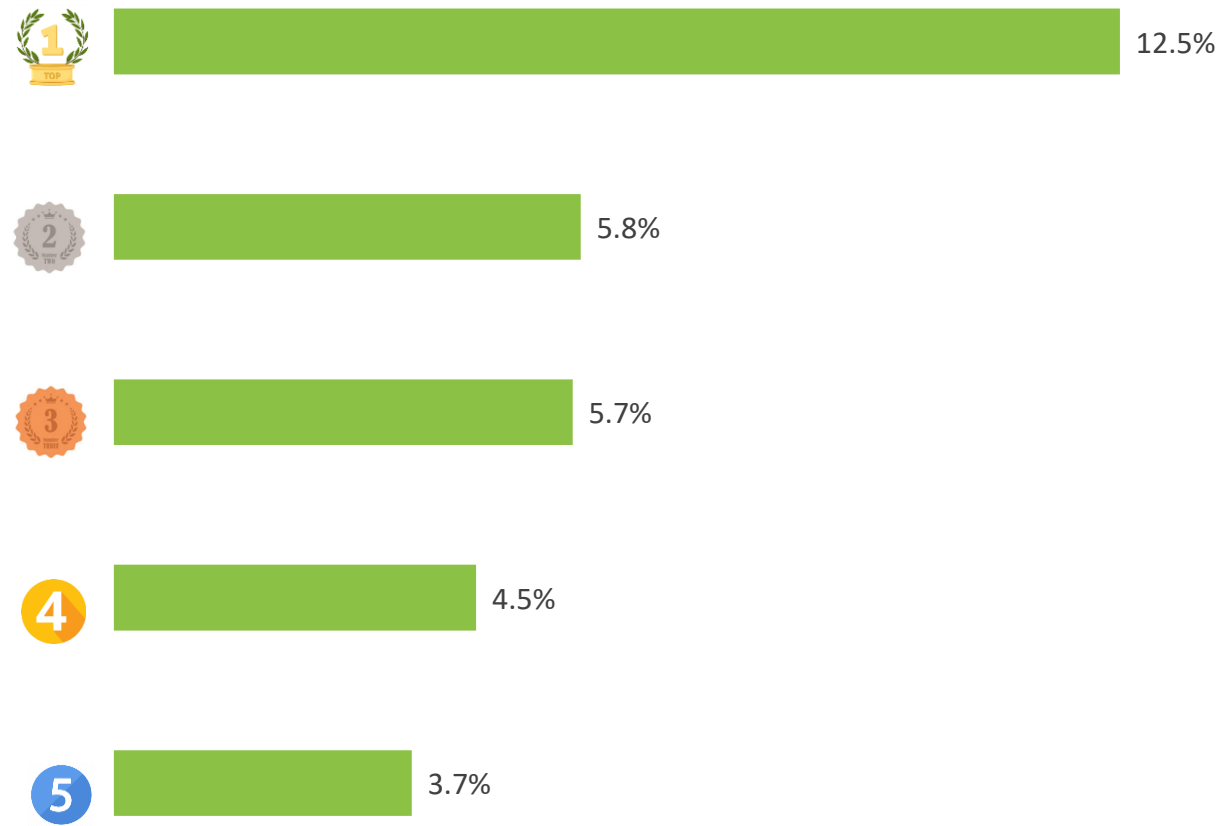
Decreased **48.7%** compared to Jun-2025

Increased **192.5%** compared to Jul-2024

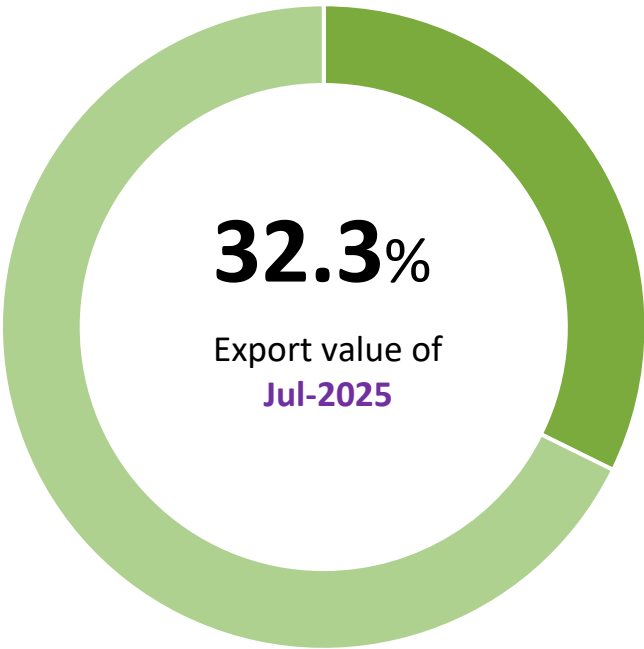


FRUITS & VEGETABLES (EXPORT)

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



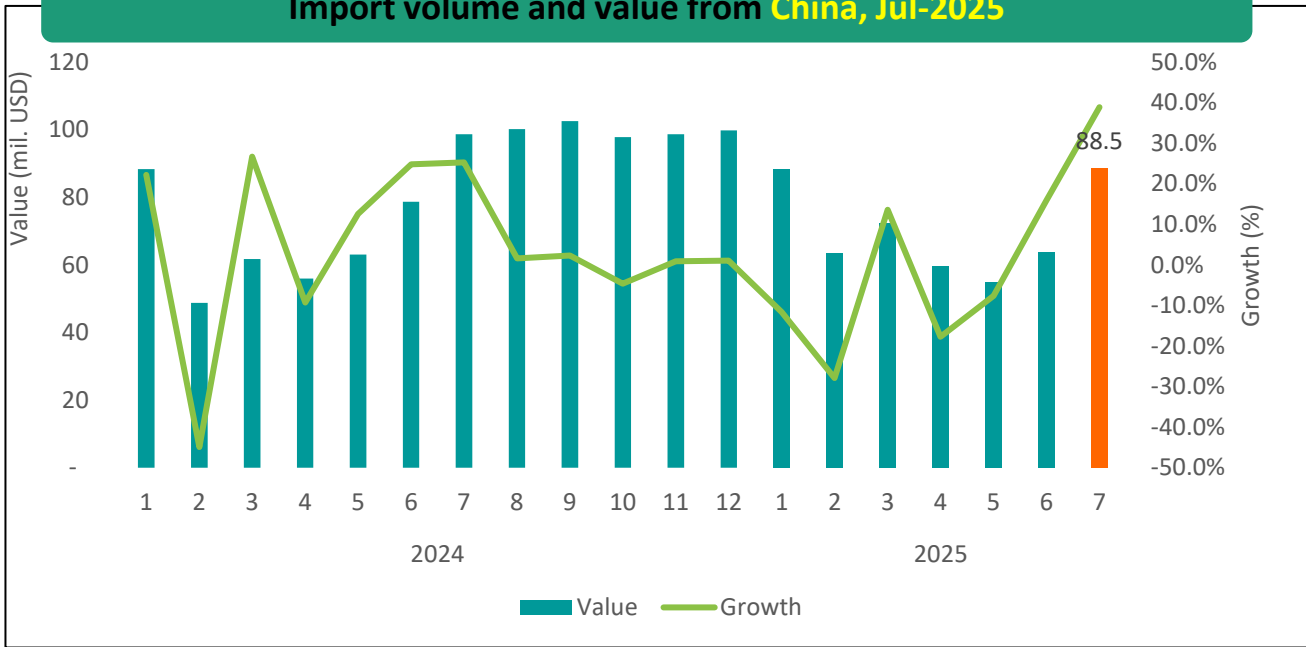
Value ratio of TOP 5 export enterprises to China, Jul-2025





FRUITS & VEGETABLES (IMPORT)

Import volume and value from China, Jul-2025



Import results from China, Jul-2025

VALUE



88.5

mil. USD

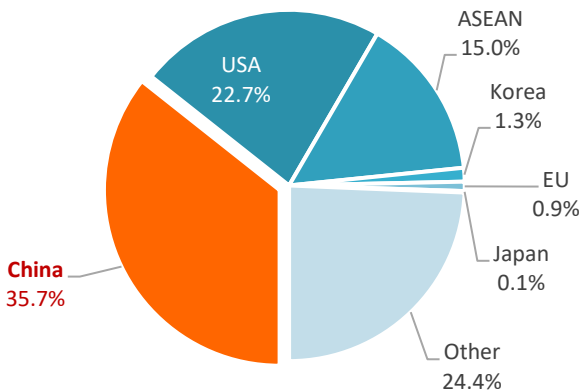
Increased **38.9%** compared to Jun-2025

Decreased **10.3%** compared to Jul-2024

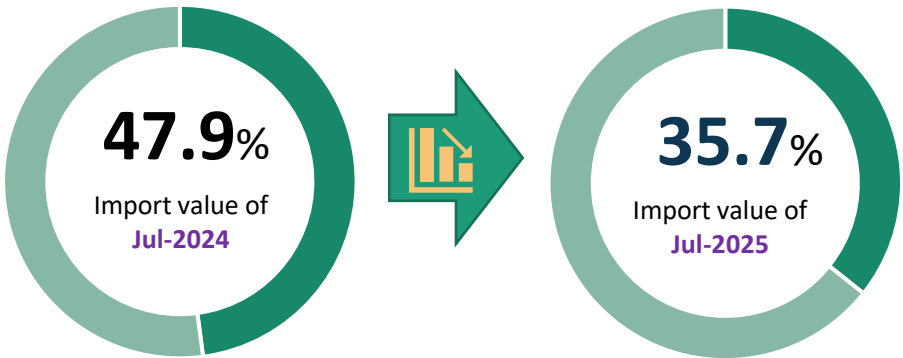
5.7 mil. USD more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **490.7 mil. USD**, **49.4%** of total 2024

Percentage of import value from China, Jul-2025



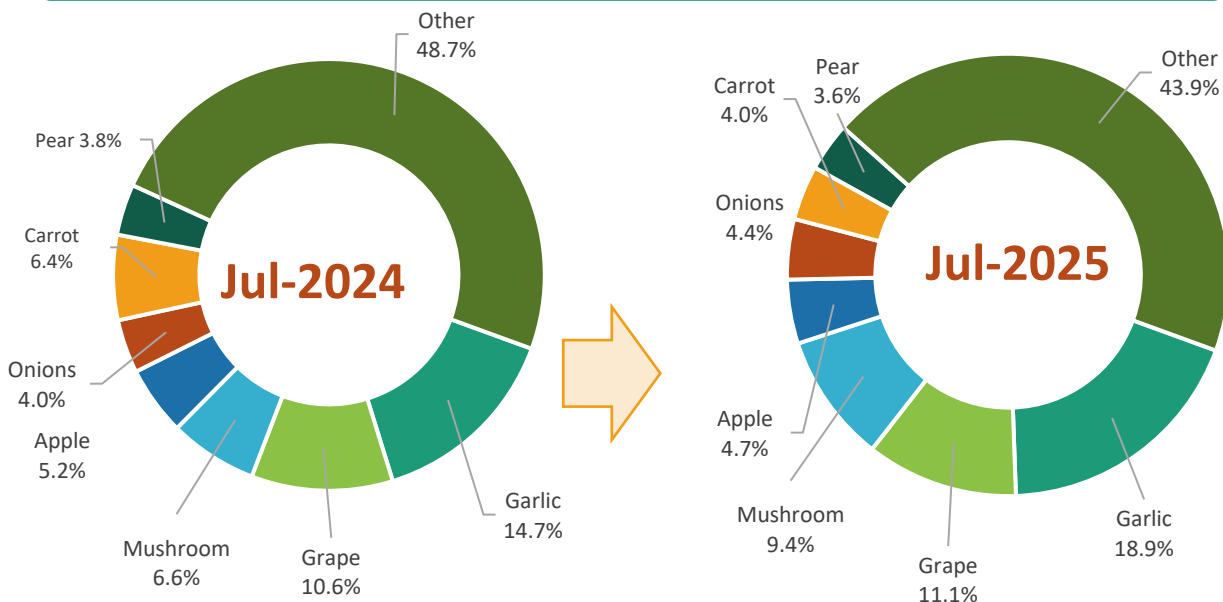
Changes in percentage of import value from China, Jul-2025





FRUITS & VEGETABLES (IMPORT)

Structure of imports by products from China, Jul-2025



Apple

Value: **4.1** mil. USD

Increased **22.5%** compared to Jun-2025

Decreased **18.7%** compared to Jul-2024



Onions

Value: **3.9** mil. USD

Increased **9.0%** compared to Jun-2025

Decreased **1.4%** compared to Jul-2024



Garlic

Value: **16.7** mil. USD

Increased **42.9%** compared to Jun-2025

Increased **15.5%** compared to Jul-2024



Grape

Value: **9.8** mil. USD

Increased **117.8%** compared to Jun-2025

Decreased **6.0%** compared to Jul-2024



Mushroom

Value: **8.3** mil. USD

Increased **20.4%** compared to Jun-2025

Increased **27.9%** compared to Jul-2024



Carrot

Value: **3.5** mil. USD

Decreased **27.0%** compared to Jun-2025

Decreased **43.8%** compared to Jul-2024



Pear

Value: **3.1** mil. USD

Increased **74.1%** compared to Jun-2025

Decreased **16.6%** compared to Jul-2024

FRUITS & VEGETABLES

SPOTLIGHTS



Chinese exports pomelos to New Zealand for the first time

China exported a shipment of 18.7 tons of pomelos to New Zealand, marking the first time that fresh Chinese pomelos entered the Southern Hemisphere market. The price of pomelos in New Zealand is about 50% higher than in traditional markets.

The shipment consisted of Fuhe pomelos from Fujian Province, renowned for their thin peel, juiciness, plump segments, and sweet flavor, with a cultivation history of more than 500 years. This pomelo variety has been exported for over 20 years, reaching markets across the European Union, North America, the Middle East, and more than 50 countries and regions. Currently, Fuhe County remains the largest pomelo production and export hub in China, with an annual export volume of around 200,000 tons.

Source: Guojiguoshu.com

Shanxi province successfully trials cultivation of Zhongjiao 9 bananas

The Guangsi Agriculture Cooperative in Yuncheng (Shanxi Province) successfully trialed the cultivation of the Zhongjiao 9 banana variety in greenhouses. This banana variety adapts well to northern soils, with yields reaching about 6,000–8,000 kilograms per 0.67 hectares, while meeting quality standards.

The cooperative has adopted a double-arch, double-film greenhouse system equipped with temperature-control devices to maintain temperatures above 10°C in winter and provide ventilation when temperatures rise above 30°C in summer. Previously, bananas grown in greenhouses at the same latitude in Shenmu (Shanxi Province) had also successfully borne fruit.

Source: Guojiguoshu.com

SPOTLIGHTS



Nearly 22 tons of fresh coconut officially were exported to China

Vietnam currently has more than 200,000 hectares of coconut plantation area, producing 2 million tons annually. In 2024, coconut export turnover exceeded USD 1 billion with more than 60 products, 35 of which were shipped to 90 countries worldwide.

Source: Vnbusiness.vn



China remains a potential market with significant opportunities for Vietnam's fruit and vegetable

In the first seven months of 2025, exports of fruits and vegetables to China accounted for 52.6% of Vietnam's total fruit and vegetable export value. China is considered as a key and promising market for Vietnamese vegetable and fruit due to its large demand and the steadily expanding official import channels for many types of fruits. However, China is tightening regulations on quality, food safety, traceability, and packaging. In addition, competition from Thailand, Laos, and Cambodia is also increasing.

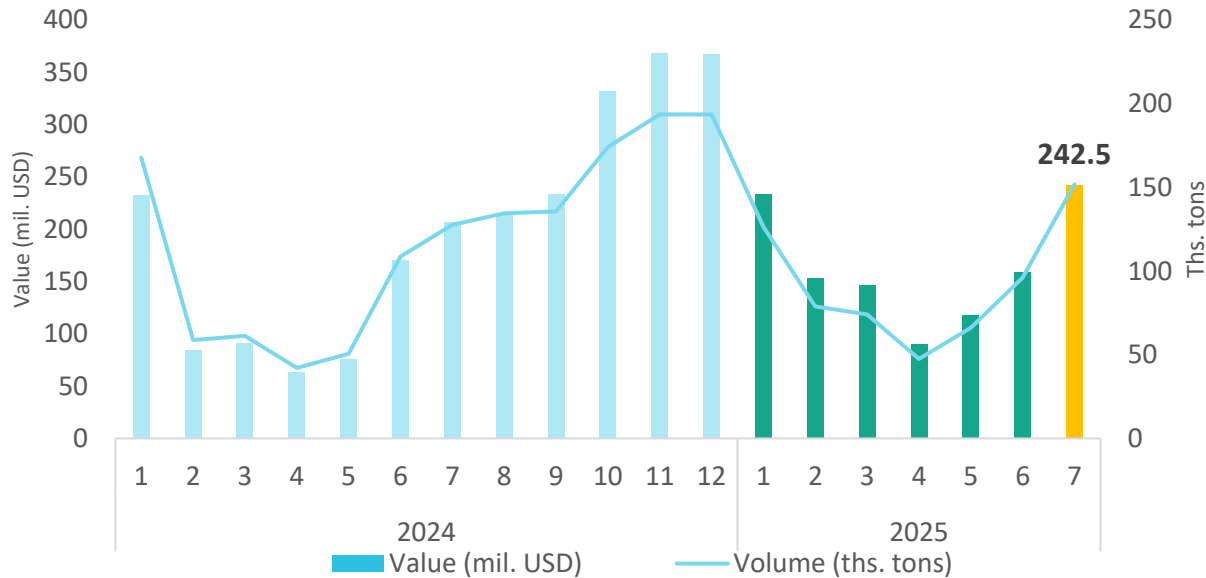
Experts recommend that Vietnamese enterprises proactively update policies, participate in seminars, conduct market surveys, and focus on processed products to enhance value and ensure stable market access. The Ministry of Industry and Trade is supporting promotion activities, including the Vietnam Fruit and Agricultural Products Festival to be held in Hunan, China, in September 2025, aimed at boosting publicity and market connections.

Source: [Vnbusiness.vn](https://vnbusiness.vn)

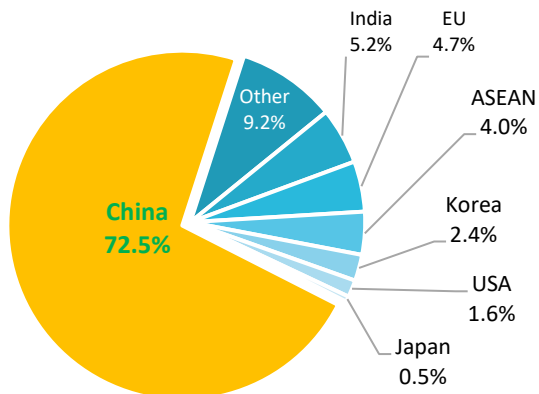


RUBBER

Export volume and value to China, Jul-2025



Percentage of export value to China, Jul-2025



Export results to China, Jul-2025

VALUE

242.5 mil. USD

Increased **52.9%** compared to Jun-2025

Increased **17.3%** compared to Jul-2024

Increased **39 mil. USD** more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **1.14 bil. USD, 46.8%** of total 2024

VOLUME

151.9 ths. tons

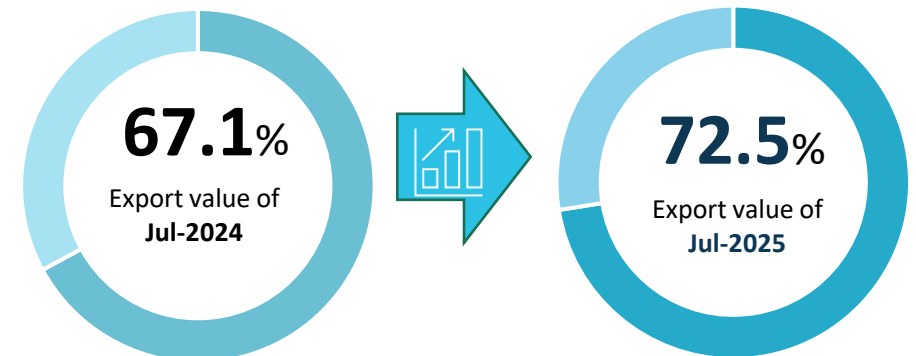
Increased **58.2%** compared to Jun-2025

Increased **19%** compared to Jul-2024

Increased **31 ths. tons** more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **641 ths. tons, 44.2%** of total 2024

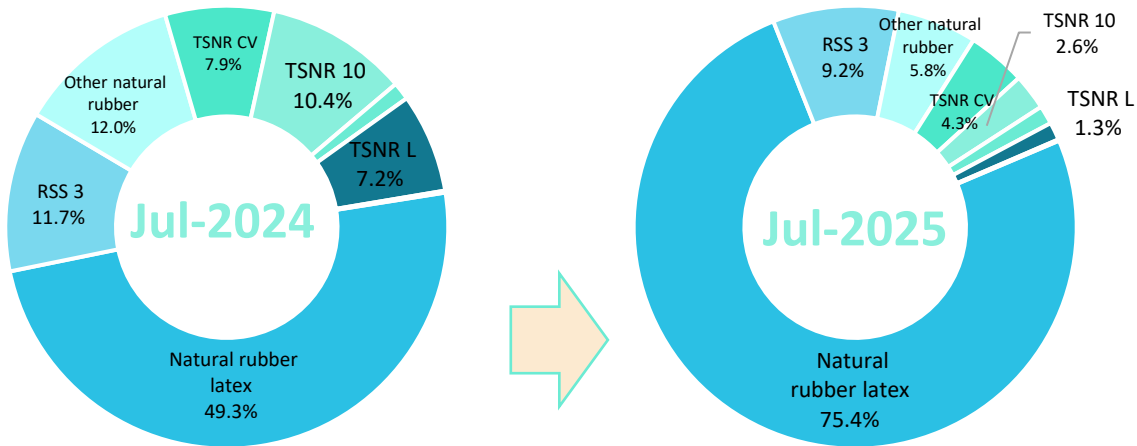
Changes in percentage of export value to China, Jul-2025



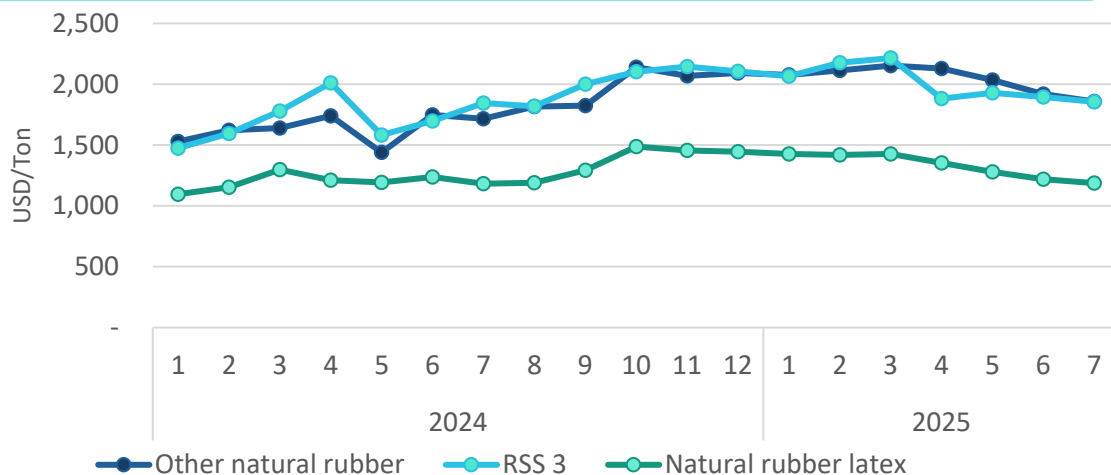


RUBBER

Structure of exports by products to China, Jul-2025



Average export price to China, Jul-2025



Export results to China, Jul-2025



Natural rubber latex

Value: **182.8** mil. USD

Increased **94%** compared to Jun-2025

Increased **79%** compared to Jul-2024



RSS 3

Value: **22.3** mil. USD

Increased **101%** compared to Jun-2025

Decreased **7.9%** compared to Jul-2024



Other natural rubber

Value: **14.1** mil. USD

Decreased **32%** compared to Jun-2025

Decreased **43%** compared to Jul-2024

Natural rubber latex

The average export price in Jul-2025 is **1.187** USD/ton; **decreased 2.6%** compared to the previous month; and **increased 0.7%** compared to the same month of 2024

RSS 3

The average export price in Jul-2025 is **1.856** USD/ton; **decreased 2.0%** compared to the previous month; and **increased 3.9%** compared to the same month of 2024

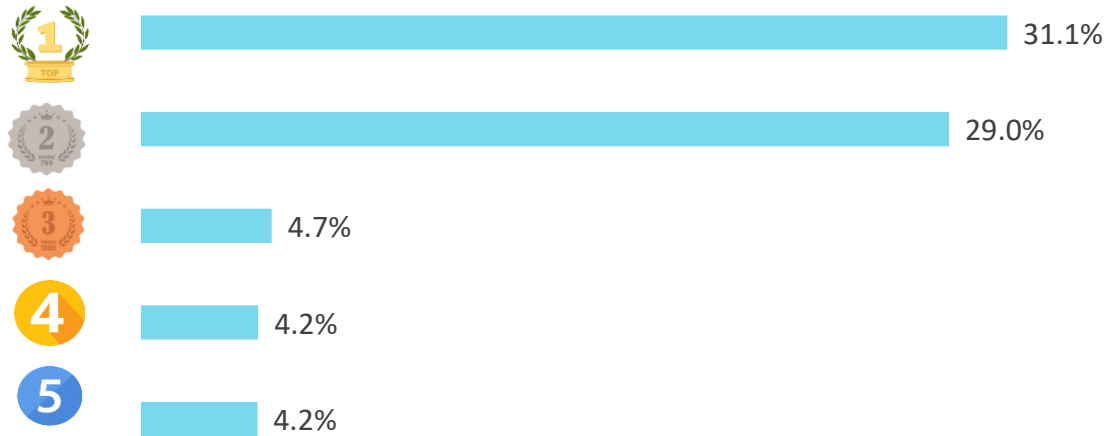
Other natural rubber

The average export price in Jul-2025 is **1.857** USD/ton; **decreased 3.2%** compared to the previous month; and **increased 0.6%** compared to the same month of 2024

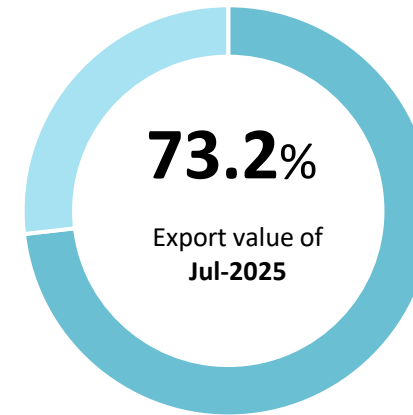


RUBBER

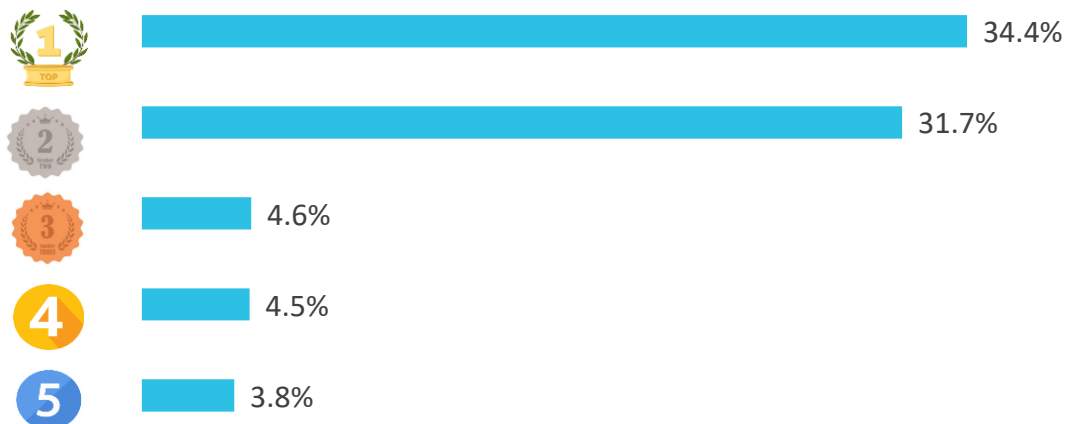
TOP 5 export enterprises by value to China, Jul-2025



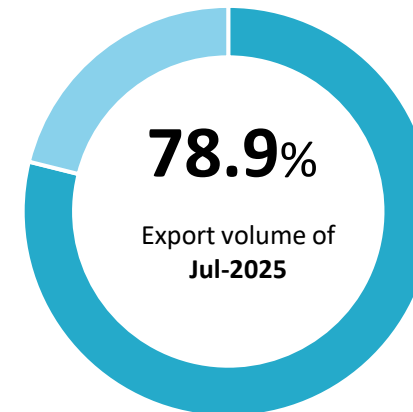
Value ratio of TOP 5 export enterprises to China, Jul-2025



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



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





RUBBER

SPOTLIGHTS

❖ China's rubber industry in the second half of 2025: domestic consumption offsets exports, accumulation in Q3 and recovery in Q4

On the supply side, global rubber output remains generally stable, with increases in China, Thailand, and India, while Indonesia, Malaysia, and Vietnam recorded declines. In China, rubber imports rose by 20.8% in the first seven months of 2025, keeping port inventories at a high level.

On the demand side, China's automobile market has been recovered thanks to rising domestic consumption, although exports have dropped sharply. Tire production reached around 7 billion units in the first seven months, up 7.2% year-on-year, but showed signs of slowing in July compared with the previous month. Nevertheless, tire exports continued to grow, demonstrating notable resilience against trade barriers.

Since early of 2025, the rubber market has been driven by macroeconomic factors, particularly international trade risks. The outlook for China's rubber industry remains positive in the near term: Q3 is expected to see modest growth, while Q4 is projected to rebound with stronger momentum.





RUBBER

SPOTLIGHTS

❖ China increases to import Vietnamese rubber in July 2025

In July 2025, China remained the Vietnam's largest rubber export market, accounting for 73.7% of total volume and 72.5% of export value. Specifically, Vietnam exported 151,900 tons of rubber to China, worth USD 242.5 million, up 19% in volume and 17.3% in value compared with the same period in 2024.

The average export price of rubber to China reached USD 1,596 per ton, down 1.4% year-on-year. The lower prices encouraged China to increase imports of rubber from Vietnam.

According to forecasts from the ANRPC, unfavorable weather conditions in major rubber-producing countries in Southeast Asia could tighten global supply, while demand from China continues to rise. These factors are expected to support rubber prices to recover in July and August 2025, following a sharp decline in the second quarter of the year.

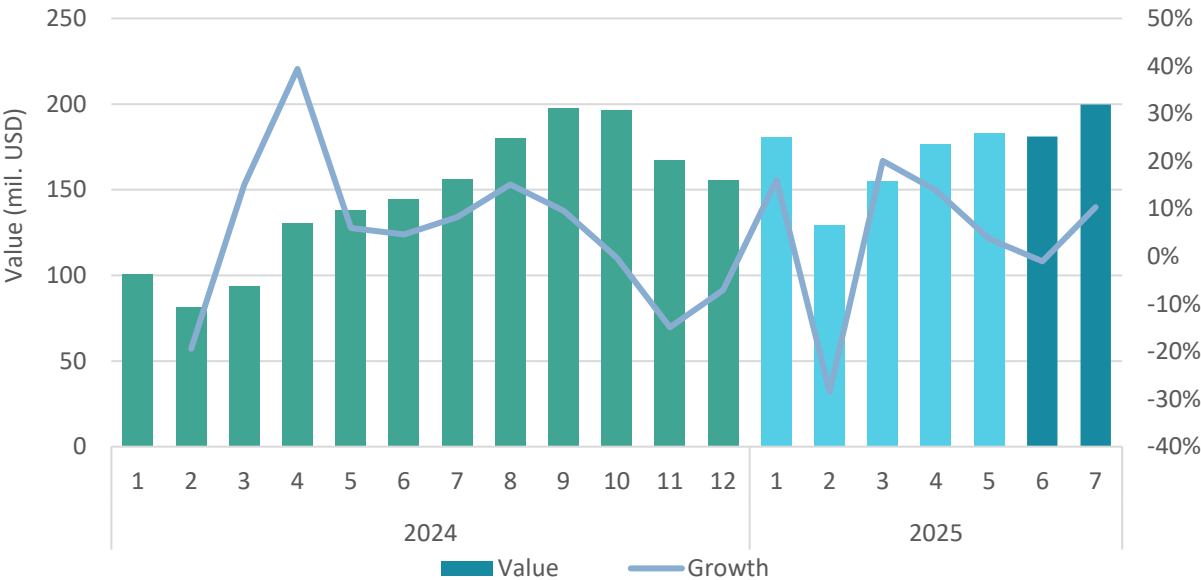
Source: Moit.gov.vn





FISHERIES

Export volume and value to China, Jul-2025



Export results to China, Jul-2025

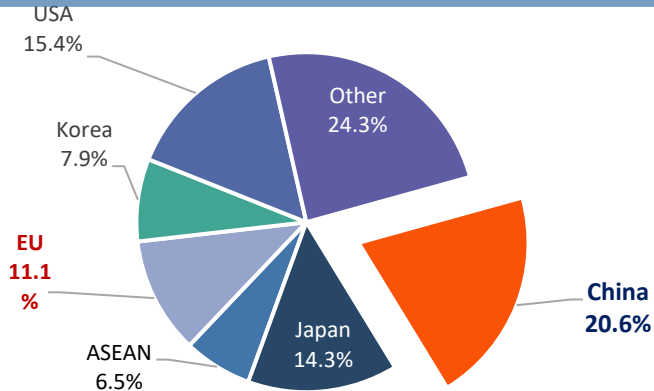
VALUE
199.8 mil. USD



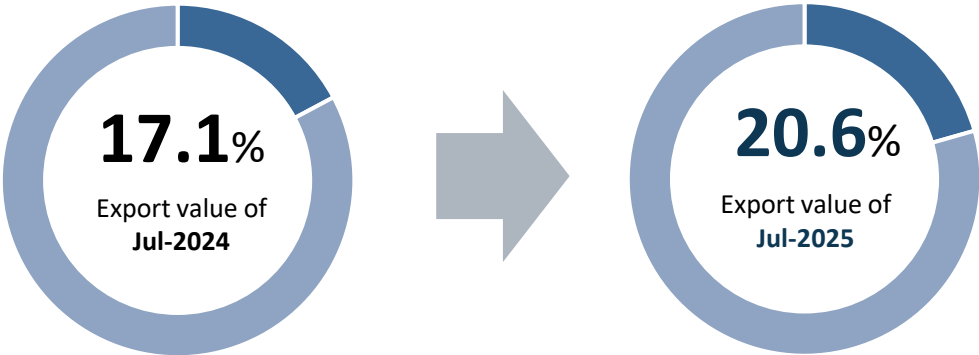
- Increased **10.3%** compared to Jun-2025
- Increased **27.7%** compared to Jul-2024
- 54.6** mil. USD more than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **1205.1** mil. USD, **69.2%** of total 2024

Percentage of export value to China, Jul-2025



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

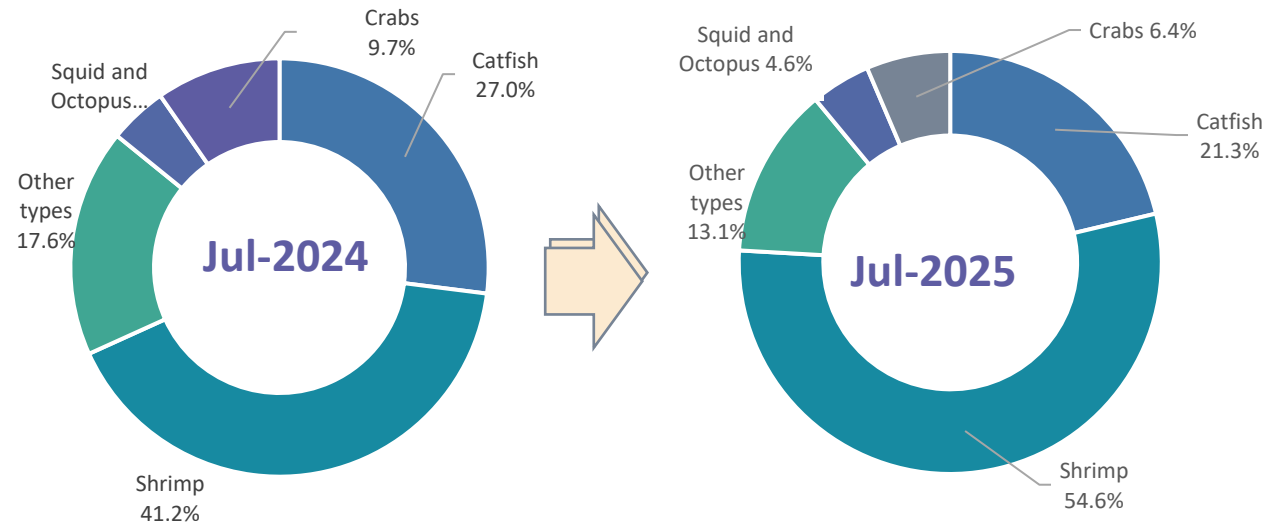


Source: Calculated from data of the Department of Customs

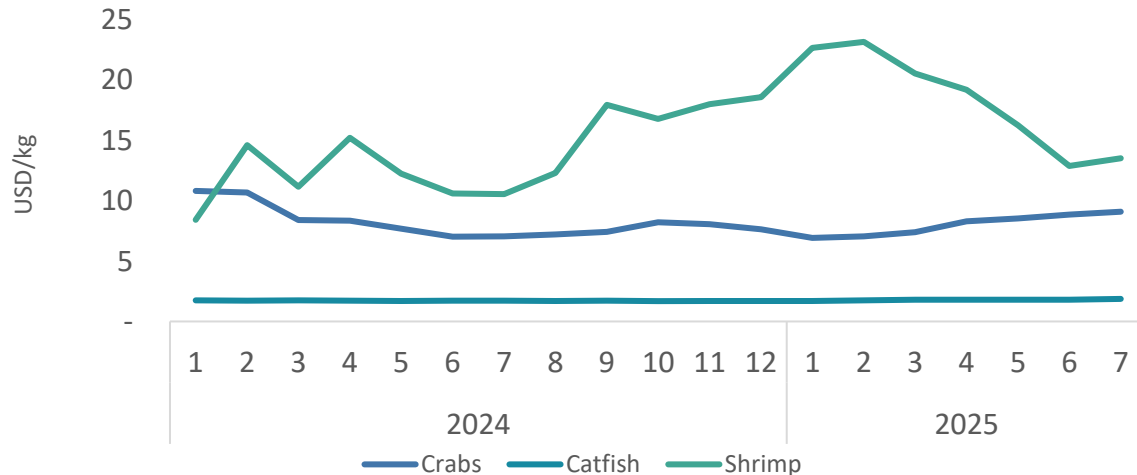


FISHERIES

Structure of exports by products to China, Jul-2025



Average export seafood price to China, Jul-2025



Seafood exports to China, Jul-2025



Catfish

Value: **42.5** mil. USD

Decreased **4.3%** compared to Jun-2025

Increased **0.7%** compared to Jul-2024



Shrimp

Value: **109.1** mil. USD

Increased **15.2%** compared to Jun-2025

Increased **69.2%** compared to Jul-2024



Crabs

Value: **12.8** mil. USD

Decreased **6.1%** compared to Jun-2025

Decreased **15.0%** compared to Jul-2024

Crabs

The average export price in Jul-2025 is **9.1** USD/kg; **increased 2.6%** compared to the previous month; and **increased 28.6%** compared to the same month of 2024

Catfish

The average export price in Jul-2025 is **1.9** USD/kg; **increased 3.3%** compared to the previous month; and **increased 8.0%** compared to the same month of 2024

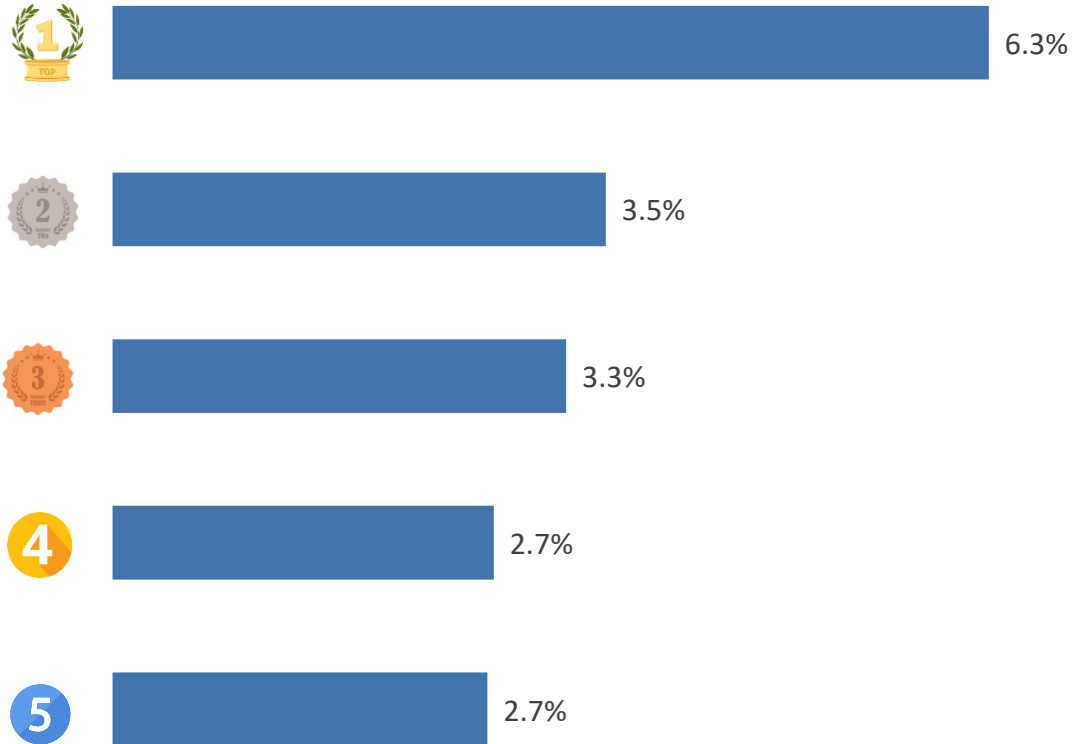
Shrimp

The average export price in Jul-2025 is **13.3** USD/kg; **increased 4.9%** compared to the previous month; and **increased 28.2%** compared to the same month of 2024

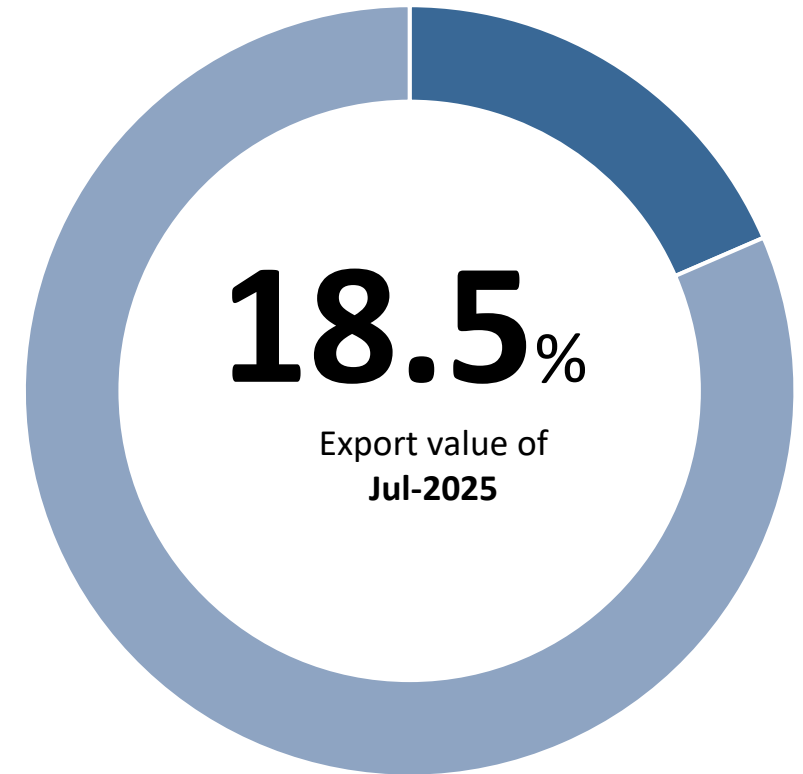


FISHERIES

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



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



China's shrimp imports in July 2025 reach highest level since early 2024

China imported 90,677 tons of frozen warm-water shrimp in July 2025, increasing 10% from July 2024, marking the highest monthly level since January 2024. By the end of July, total shrimp imports reached 519,437 tons, down 2% year-on-year, but the value rose 7% to USD 2.73 billion as average prices increased 9% to USD 5.25/kg.

Ecuador is the largest suppliers with 69,327 tons in July (+16%), accounting for 75% of imports in the first seven months (389,069 tons, worth USD 1.89 billion, +7%). India's shipments fell 7% to 14,570 tons in July, bringing the seven-month total to 76,330 tons, valued at USD 432 million (-7%).

Other suppliers have increase export, including Myanmar at 2,942 tons (+283% in July, +96% year-to-date), Argentina at 12,471 tons (+137% in July, +37% year-to-date), and Thailand at 13,958 tons (+100% in July, +13% year-to-date).

However, market conditions worsened in August as prices declined and demand weakened. Prices of Ecuadorian shrimp in China began to fall after the surge in July imports, indicating that importers had built up sufficient stocks ahead of the expected summer demand. Meanwhile, the end of the three-and-a-half-month fishing ban in the East China Sea has sharply increased domestic supply at wholesale markets.



Source: Vasep





WOOD & WOODEN PRODUCTS

Export volume and value to China, Jul-2025



Export results to China, Jul-2025

VALUE



175

mil. USD

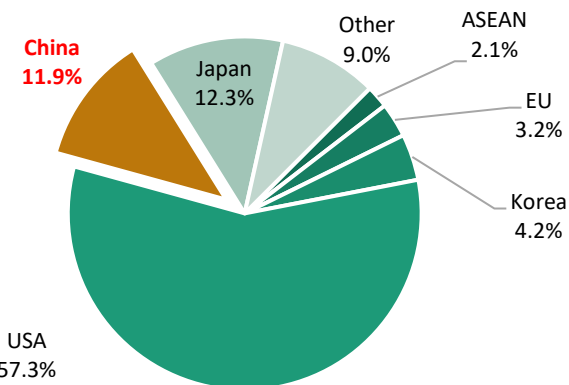
Increased **4.2%** compared to Jun-2025

Increased **17.0%** compared to Jul-2024

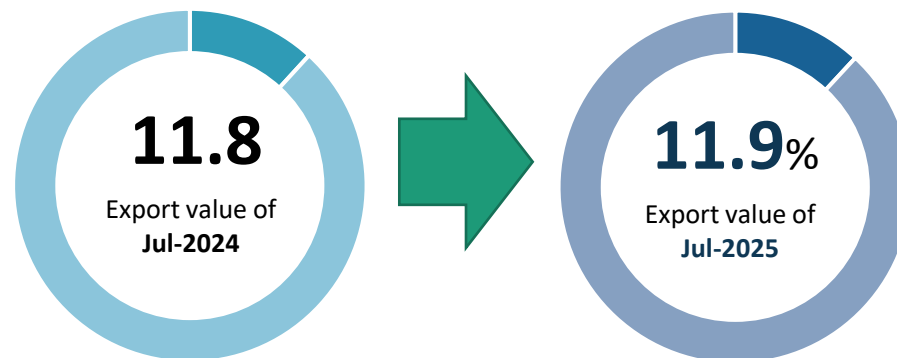
↑ Cao hơn **6.6 mil. USD** than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **1.04 bil. USD, 51.8%** of total 2024

Percentage of export value to China, Jul-2025



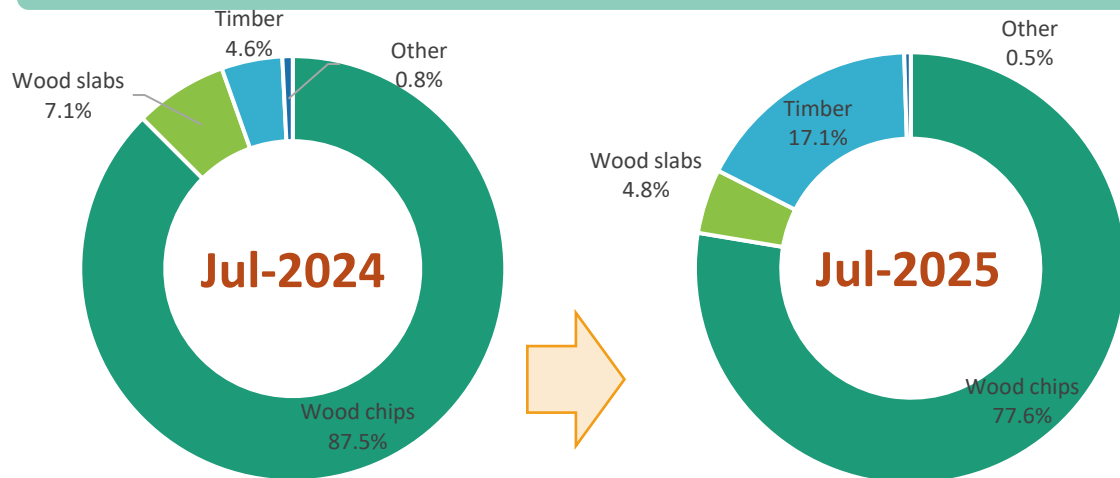
Changes in percentage of export value to China, Jul-2025



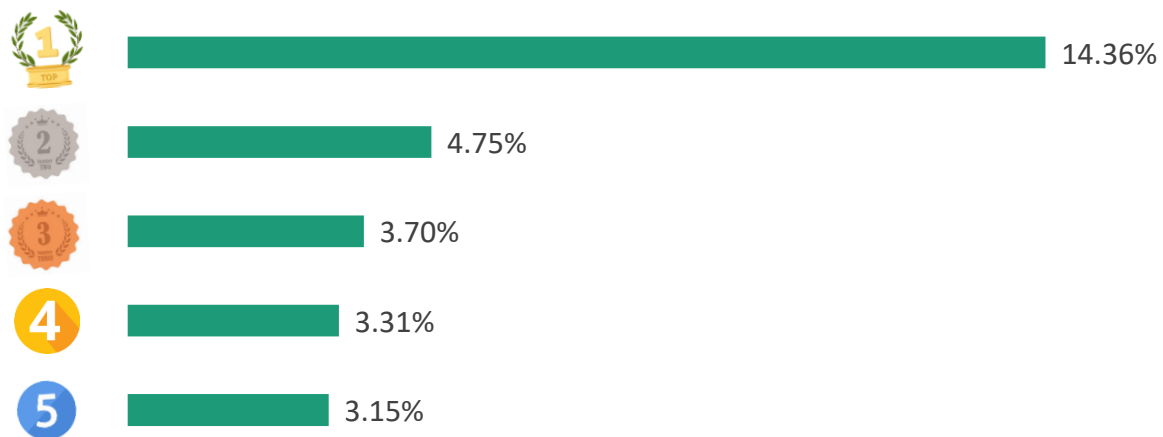


WOOD & WOODEN PRODUCTS

Structure of exports by products to China, Jul-2025



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



Export results to China, Jul-2025



Wood chips

Value: **131.9** mil. USD

Decreased **3%** compared to Jun-2025

Increased **4%** compared to Jul-2024



Timber

Value: **29.0** mil. USD

Increased **59%** compared to Jun-2025

Increased **331%** compared to Jul-2024



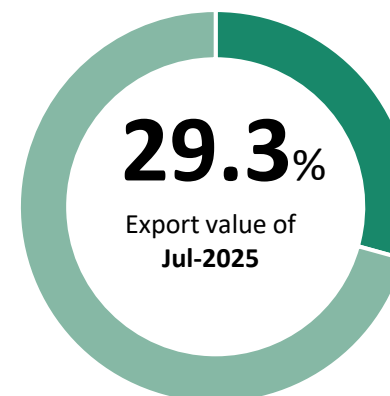
Wood slabs

Value: **8.2** mil. USD

Decreased **1%** compared to Jun-2025

Decreased **20%** compared to Jul-2024

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





SPOTLIGHTS



The slowdown in China's real estate and construction sectors directly impacted on lumber imports in the first half of 2025. According to customs data, total imports during this period fell by 13% in both volume and value, reaching only 12.15 million cubic meters. Softwood imports dropped 17%, while hardwood imports decreased 6%.

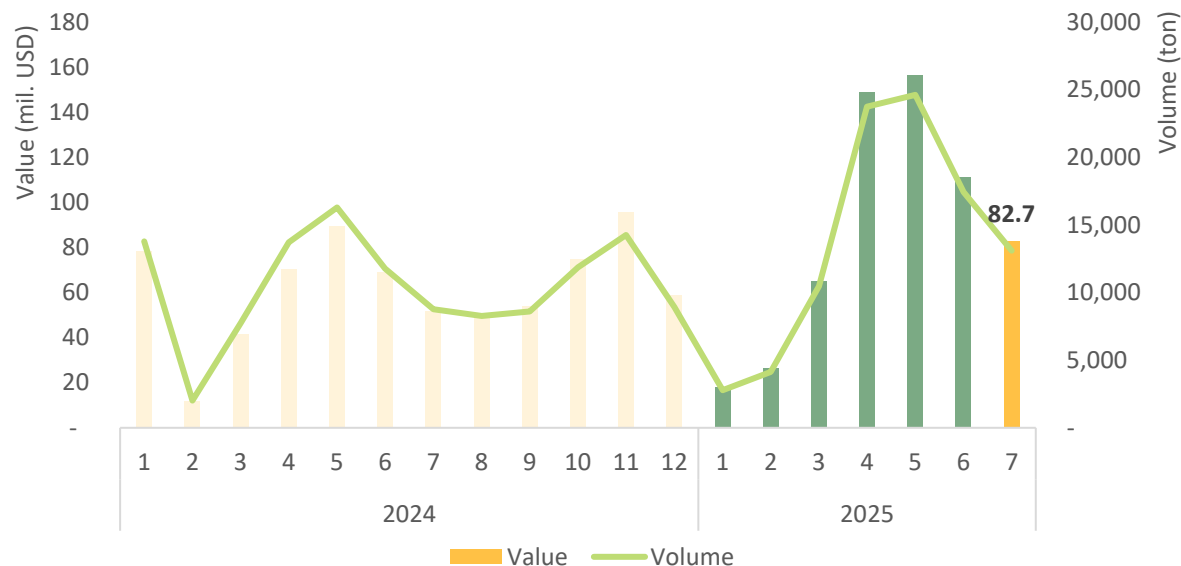
In terms of suppliers, Russia remained the largest source, but its market share fell significantly from 65% to 47% year-on-year. While imports from most major partners declined, the Philippines (+21%) and New Zealand (softwood, +41%) were notable exceptions, registering growth.

These trade figures align with industry indicators, as the Global Timber Index–China (GTI-China) dropped to 48.7% in July. Falling below the 50-point threshold for the first time in four months signaled that business activity in China's timber sector has begun to contract.



CASHEW NUTS

Export value and volume to China, Jul-2025



Export results to China, Jul-2025

VALUE

82.7 mil. USD

⬇️ Decreased **25.7%** compared to Jun-2025

⬆️ Increased **60.6%** compared to Jul-2024

⬆️ **20 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **609 mil. USD, 82%** of total 2024

VOLUME

13.1 ths. tons

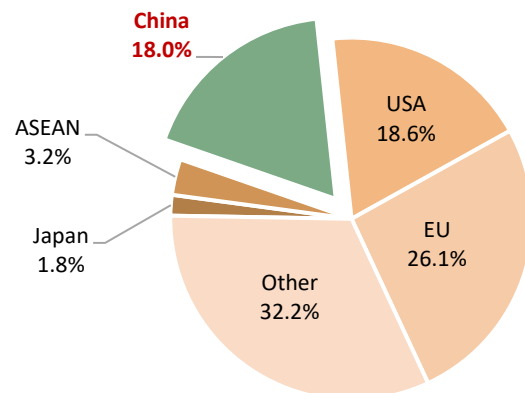
⬇️ Decreased **24.8%** compared to Jun-2025

⬆️ Increased **49.4%** compared to Jul-2024

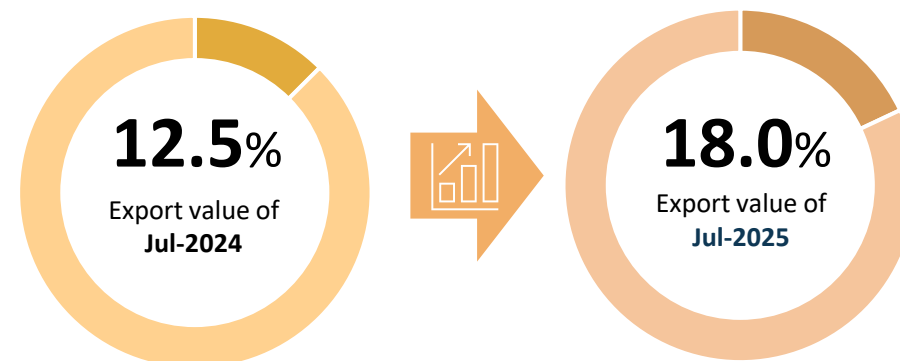
⬆️ **2.6 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **96 ths. tons, 76%** of total 2024

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



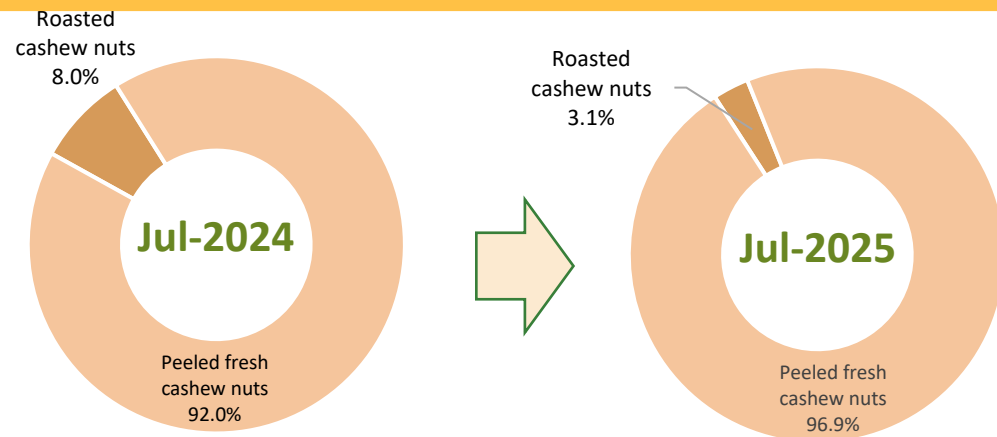
Changes in percentage of export value to China. Nov-2023



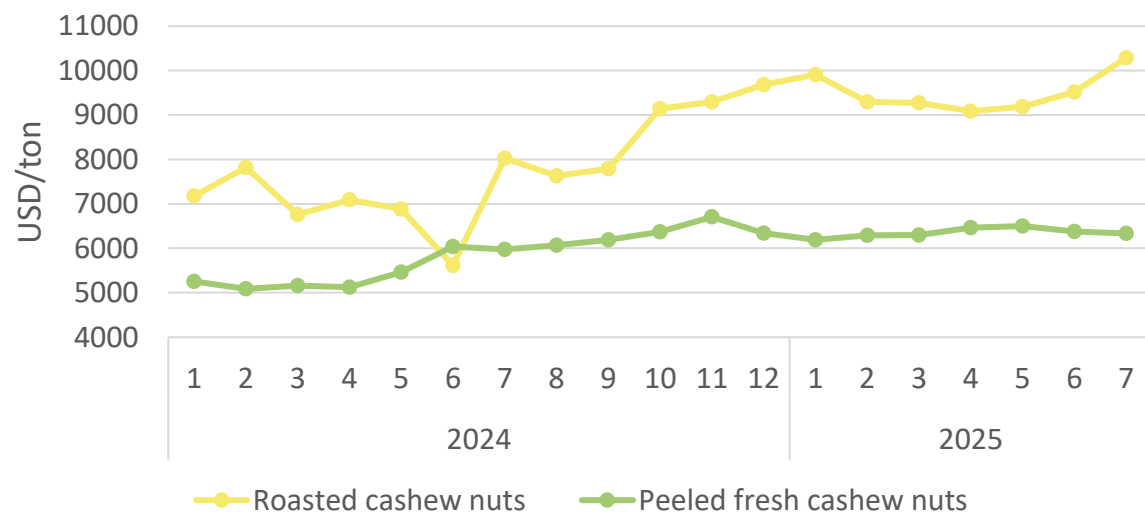


CASHEW NUTS

Structure of exports by products to China, Jul-2025



Average export cashew nuts price to China, Jul-2025



Export results to China, Jul-2025



Peeled fresh cashew nuts

Value: **80.2** mil. USD

Decreased **24.8%** compared to Jun-2025

Increased **70%** compared to Jul-2024



Roasted cashew nuts

Value: **2.5** mil. USD

Decreased **37.2%** compared to Jun-2025

Decreased **37.7%** compared to Jul-2024

Peeled fresh cashew nuts

The average export price in Jul-2025 is **6,331** USD/ton; decreased **0.7%** compared to the previous month; and increased **5.9%** compared to the same month of 2024

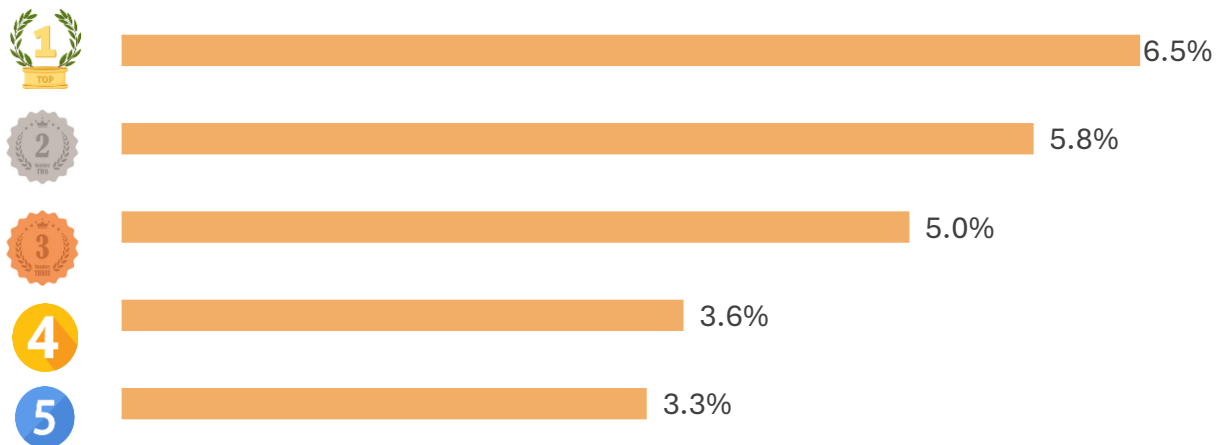
Roasted cashew nuts

The average export price in Jul-2025 is **10,288** USD/ton; increased **8.1%** compared to the previous month; and increased **28.2%** compared to the same month of 2024

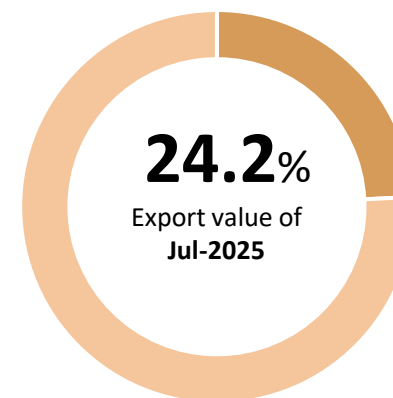


CASHEW NUTS

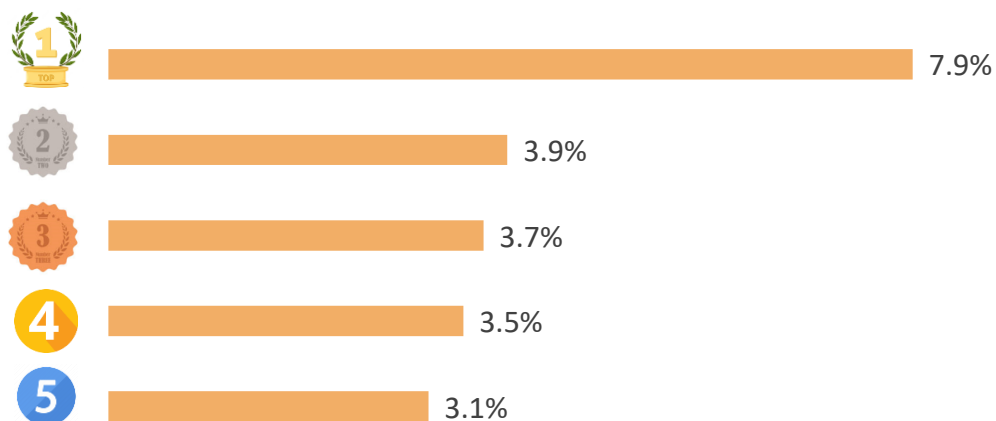
TOP 5 export enterprises by value to China, Jul-2025



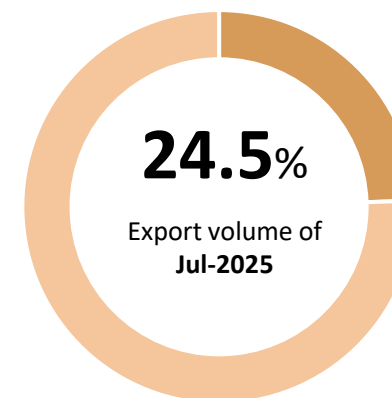
Value ratio of TOP 5 export enterprises to China, Jul-2025



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



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



CASHEW NUTS

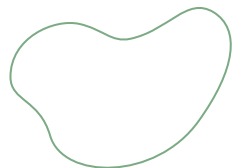


SPOTLIGHTS

In the first seven months of 2025, Vietnam exported 412,000 tons of cashew nuts, earning USD 2.8 billion. Notably, China surpassed the United States to become the Vietnam's largest cashew export market, accounting for 22.4% of total exports.

According to the Vietnam Cashew Association (VINACAS), exports to China surged in the past one to two months as Chinese traders actively stockpiled goods to meet demand for the Mid-Autumn Festival. The Import-Export Department under the Ministry of Industry and Trade also noted that this growth trend has been driven by China's economic recovery, rising consumer demand for healthy foods, and Vietnamese enterprises' increasing ability to meet partner requirements.

Source: Tienphong.vn





RICE

Export volume and value to China, Jul-2025



Export results to China, Jul-2025

VALUE
24.9 USD



Increased **41.8%** compared to Jun-2025

Increased **384.7%** compared to Jul-2024

↑ **10.9 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **251.4 mil. USD**, **149.6%** of total 2024

VOLUME
49.6 ths. tons



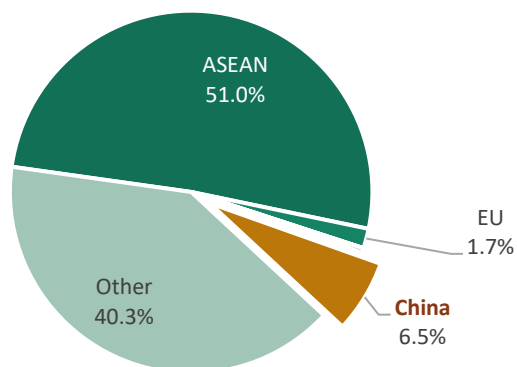
Increased **42.4%** compared to Jun-2025

Increased **462.6%** compared to Jul-2024

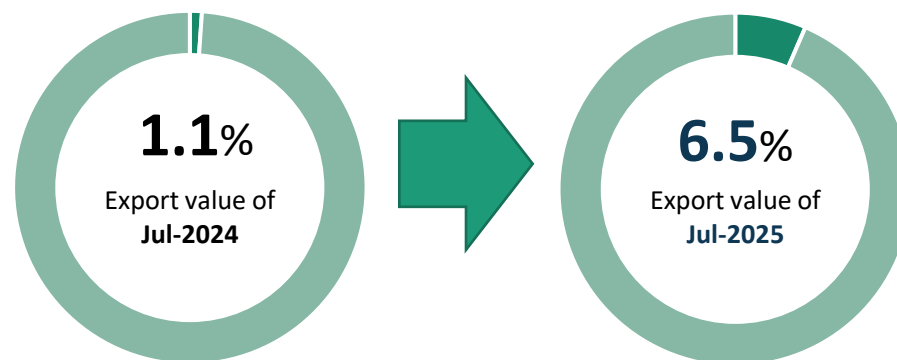
↑ **25.8 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **496.7 ths. tons**, **174.0%** of total 2024

Percentage of export value to China, Jul-2025



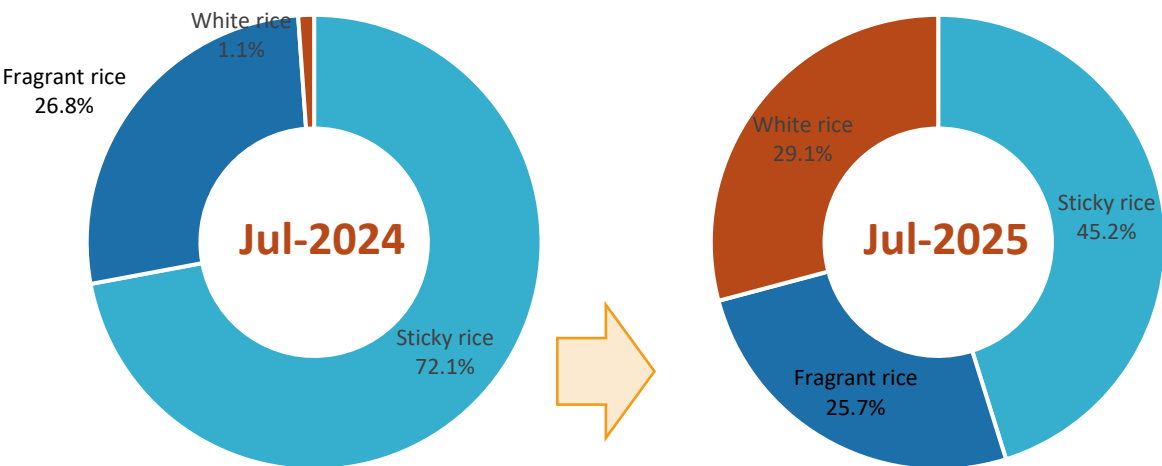
Changes in percentage of export value to China, Jul-2025



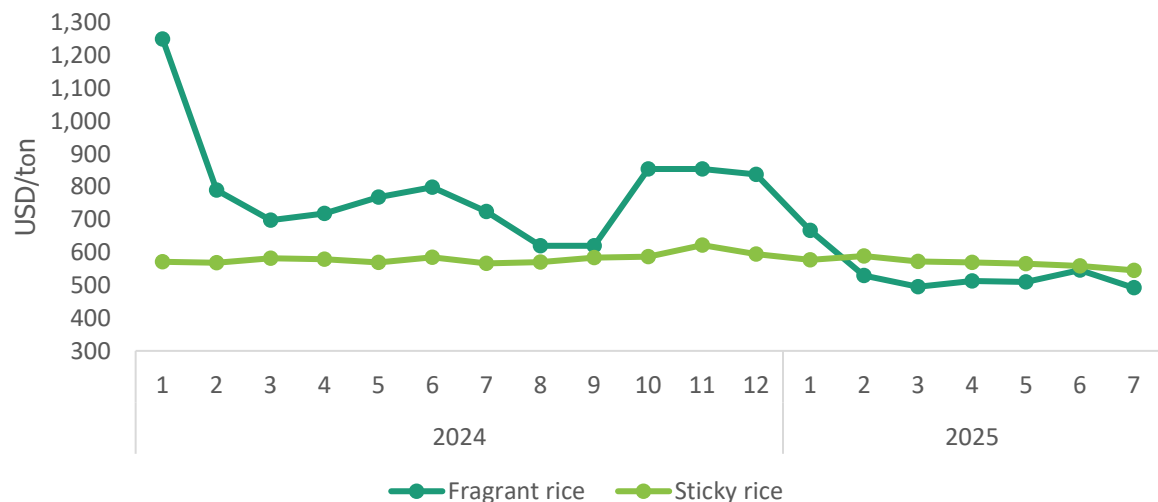


RICE

Structure of exports by products to China, Jul-2025



Average export rice price to China, Jul-2025



Export results to China, Jul-2025



Sticky rice

Value: **11.2** mil. USD

Increased **19%** compared to Jun-2025

Increased **207%** compared to Jul-2024



Fragrant rice

Value: **6.3** mil. USD

Increased **46%** compared to Jun-2025

Increased **370%** compared to Jul-2024



White rice

Value: **7.2** mil. USD

Increased **91%** compared to Jun-2025

Increased **127 times** compared to Jul-2024

Sticky rice

The average export price in Jul-2025 is **545 USD/ton**; **decreased 2%** compared to the previous month; and **decreased 4%** compared to the same month of 2024

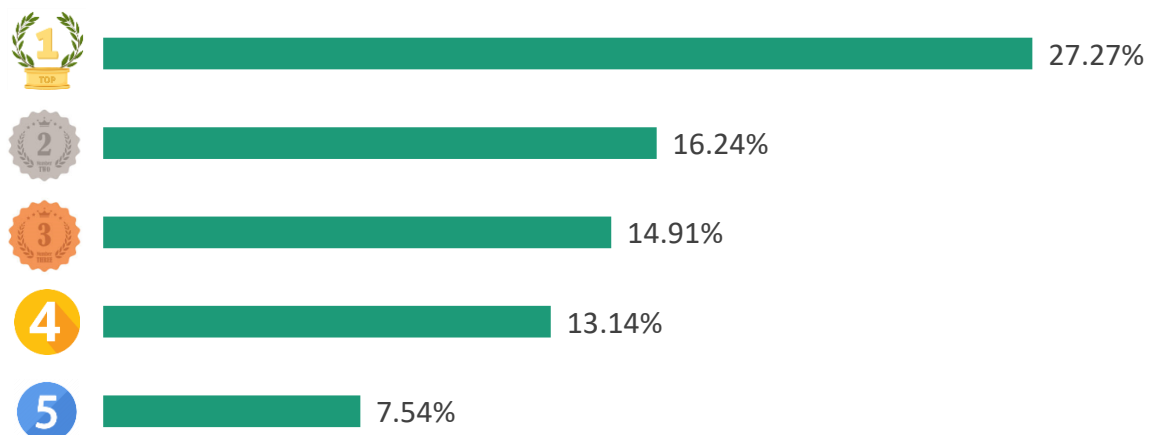
Fragrant rice

The average export price in Jul-2025 is **492 USD/ton**; **decreased 4%** compared to the previous month; and **decreased 32%** compared to the same month of 2024

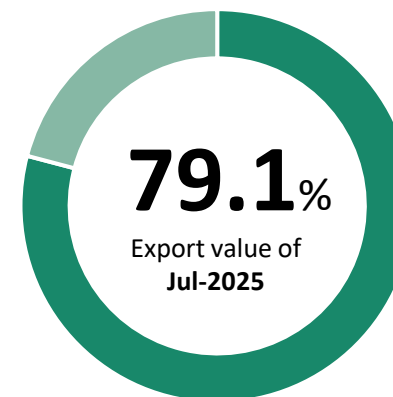


RICE

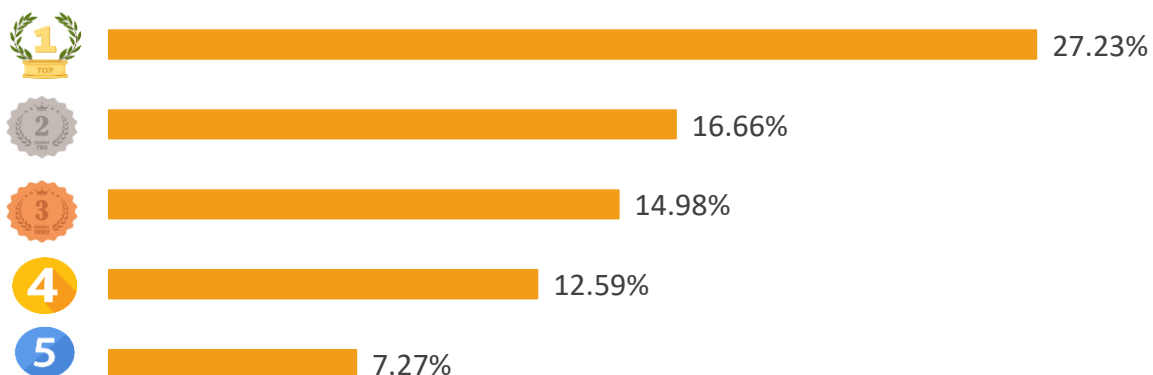
TOP 5 export enterprises by value to China, Jul-2025



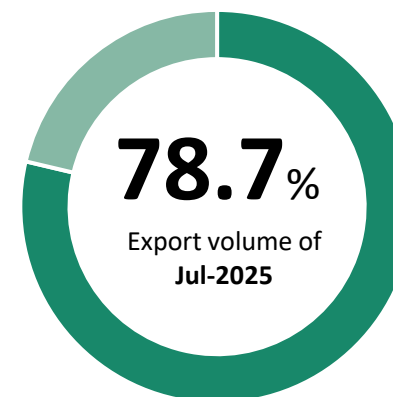
Value ratio of TOP 5 export enterprises to China, Jul-2025



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



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





RICE



SPOTLIGHTS

On August 22, 2025, China's National Bureau of Statistics (NBS) announced that early-season rice output reached 28.52 million tons, an increase of 340,000 tons, or 1.2%, compared with the same period in 2024.

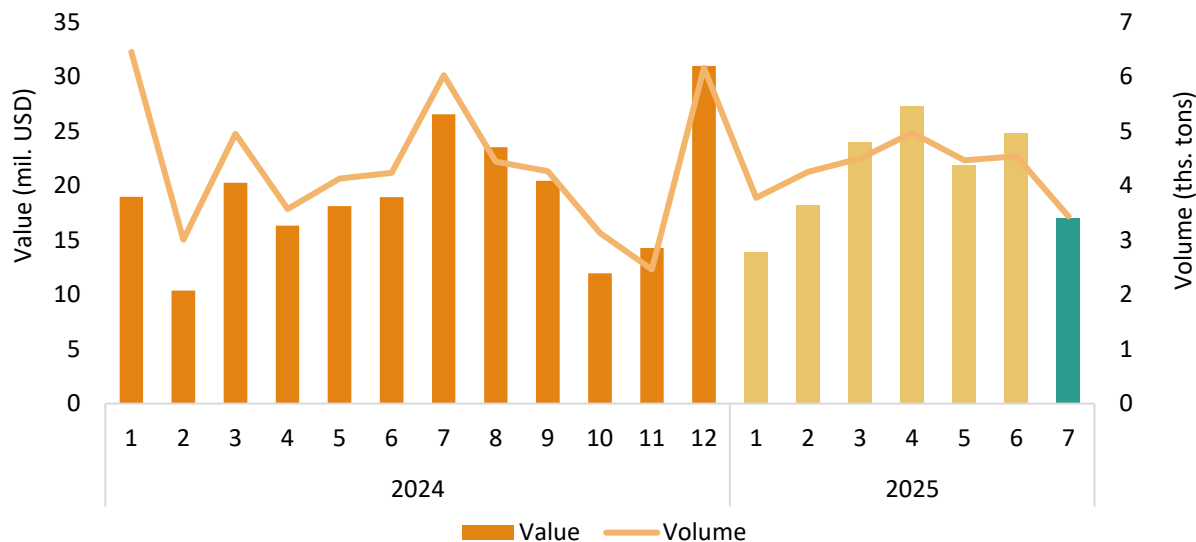
Average yield was 400.8 kilograms per mu (equivalent to 6 tons per hectare), surpassing the 400 kg per mu threshold for the first time. This represents a 1.5% increase year-on-year, despite a slight 0.3% decline in total sown area. According to the NBS, the increase was mainly due to favorable weather conditions and effective support policies. Notably, these included raising the minimum purchase price for early-season long-grain rice and offering incentive packages for key grain-producing counties.

Wei Fenghua, an NBS representative, emphasized that the rise in early-season rice output, together with stable summer rice production, has laid a solid foundation for ensuring national food security. At the same time, it contributes to supporting China's sustainable economic growth amid a complex and challenging global environment.

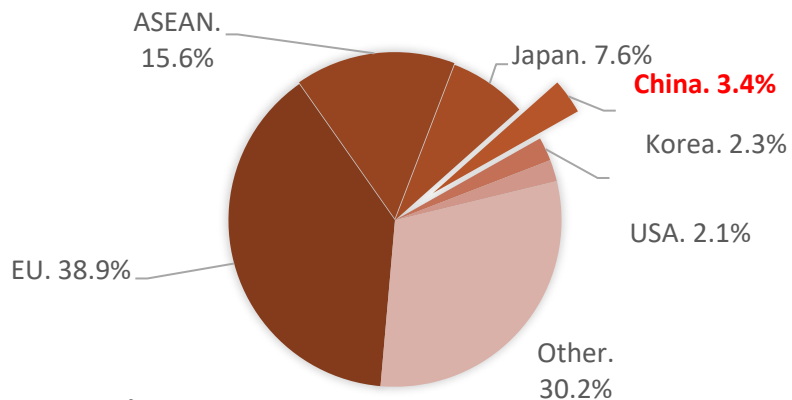


COFFEE

Export volume and value to China, Jul-2025



Percentage of export value to China, Jul-2025



Export results to China, Jul-2025

VALUE

17 mil. USD

⬇️ Decreased **31.5%** compared to Jun-2025

⬇️ Decreased **36%** compared to Jul-2024

⬇️ **2.2 mil. USD** less than the monthly average rate in 2024.

❖ Accumulated 7 months of 2025 reaches **147** mil.USD, **63.7%** of total 2024.

VOLUME

3.4 ths. tons

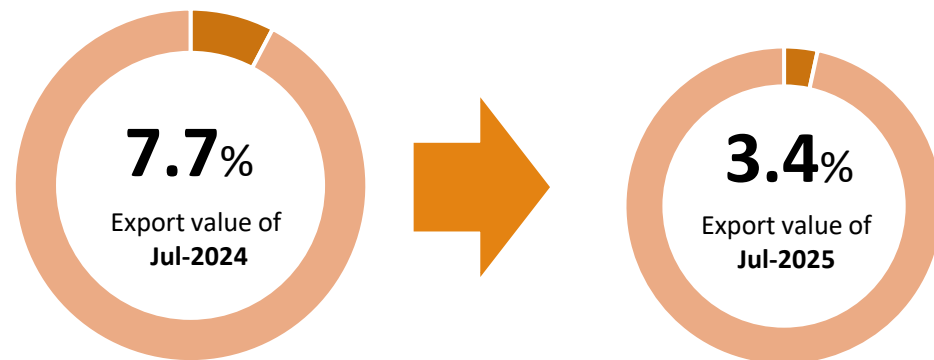
⬇️ Decreased **24.3%** compared to Jun-2025

⬇️ Decreased **42.9%** compared to Jul-2024

⬇️ **1 ths. tons** less than the monthly average rate in 2024.

❖ Accumulated 7 months of 2025 reaches **29.9** ths. tons, **56.7%** of total 2024.

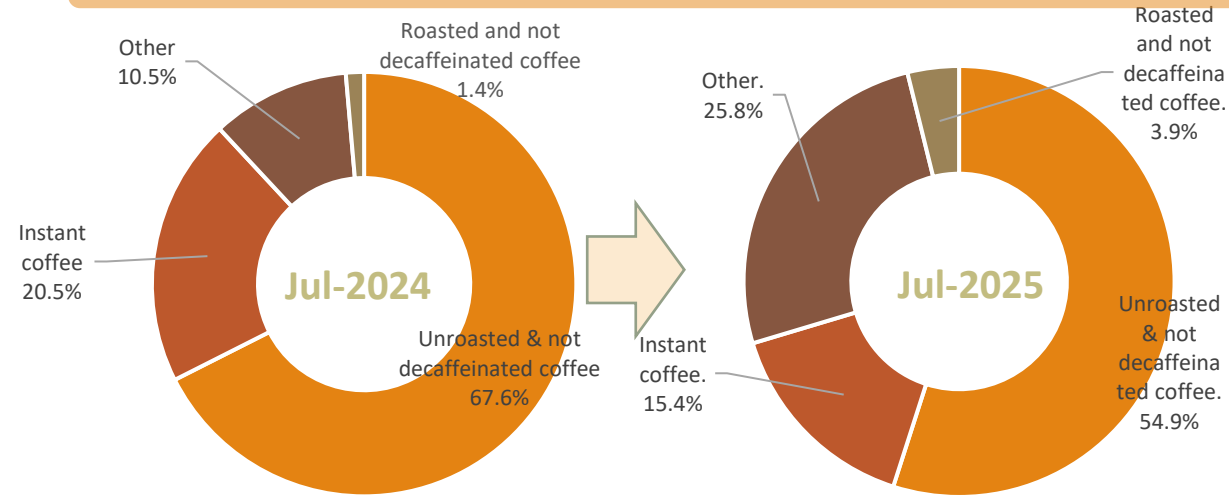
Changes in percentage of export value to China, Jul-2025



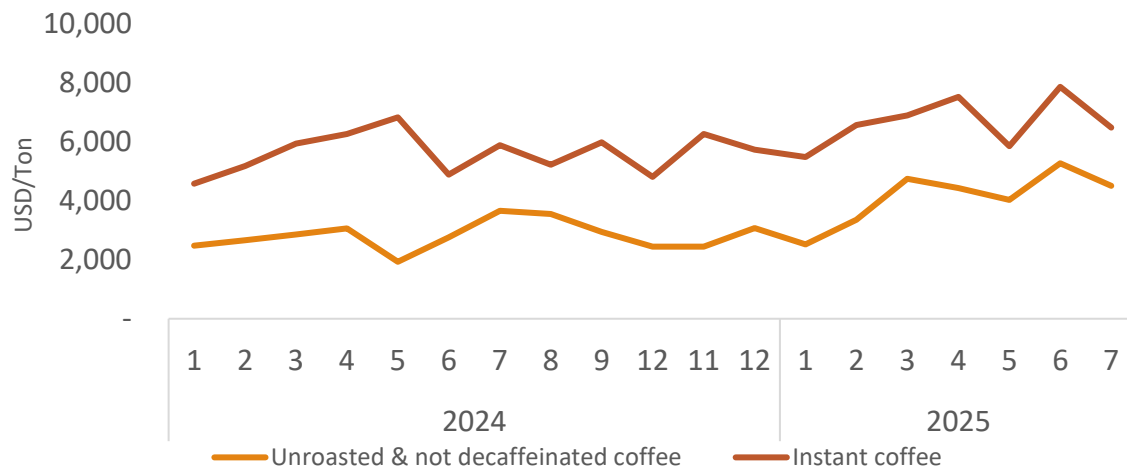


COFFEE

Structure of exports by products to China, Jul-2025



Average export price to China, Jul-2025



Export results to China, Jul-2025



Unroasted & not decaffeinated coffee

Value: **9.3** mil.USD

Decreased **42.2%** compared to Jun-2025

Decreased **38.8%** compared to Jul-2024



Instant coffee

Value: **2.6** mil.USD

Decreased **40.3%** compared to Jun-2025

Decreased **43.5%** compared to Jul-2024



Roasted and not decaffeinated coffee

Value: **0.7** mil.USD

Increased **128 %** so compared to Jun-2025

Increased **109%** compared to Jul-2024

Instant coffee

The average export price in Jul-2025 is **6,483** USD/ton, **decreased 17.6%** compared to the previous month; and **increased 10.1%** compared to the same month of 2024

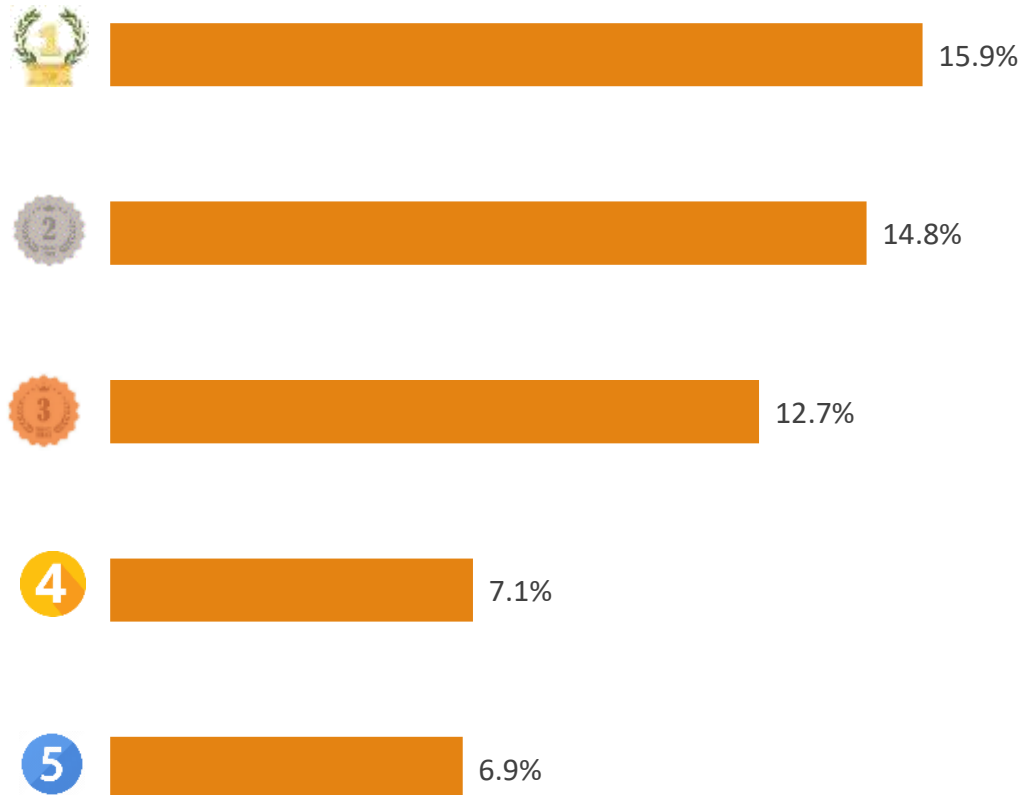
Unroasted & not decaffeinated coffee

The average export price in Jul-2025 is **4,506** USD/ton, **decreased 14.6%** compared to the previous month; and **increased 23.2%** compared to the same month of 2024

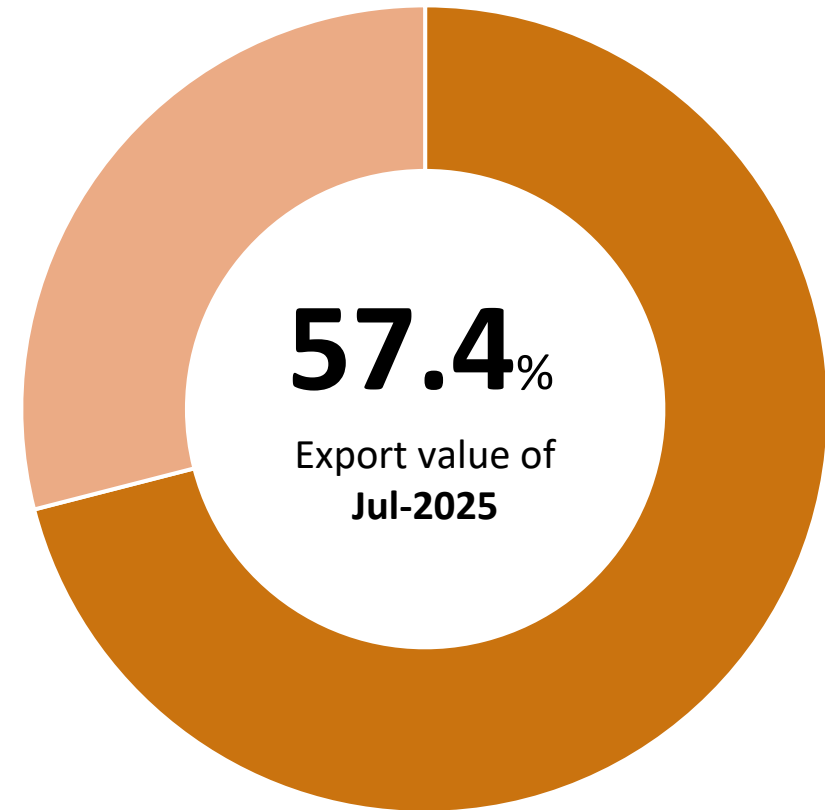


COFFEE

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



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





COFFEE

SPOTLIGHTS



On July 30, 2025, China authorized 183 Brazilian companies to export coffee to the Chinese market, with licenses valid for five years. The move came shortly after the United States announced a 50% tariff on Brazilian coffee and many other products, effective in August 6, 2025.

The measure is considered as a significant boost for Brazil's coffee industry, as the country seeks alternative markets for around 8 million bags of coffee previously exported annually to the U.S. China is currently Brazil's largest trading partner, while the U.S. remains a key importer of other Brazilian agricultural products such as beef and orange juice.

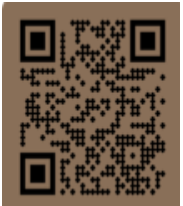
Source: Reuters.com





COFFEE

SPOTLIGHTS



A new study conducted in Yunnan Province, China, published in *NPI Natural Hazards* by Springer Nature, analyzed climate data and coffee yields over a 30-year period (1992–2022) across 29 major producing counties, which account for about 99% of the region's Arabica coffee cultivation. The results showed that frost poses the greatest threat to yields, reducing production by nearly 19% for each 1°C drop below freezing during the fruit-ripening stage.

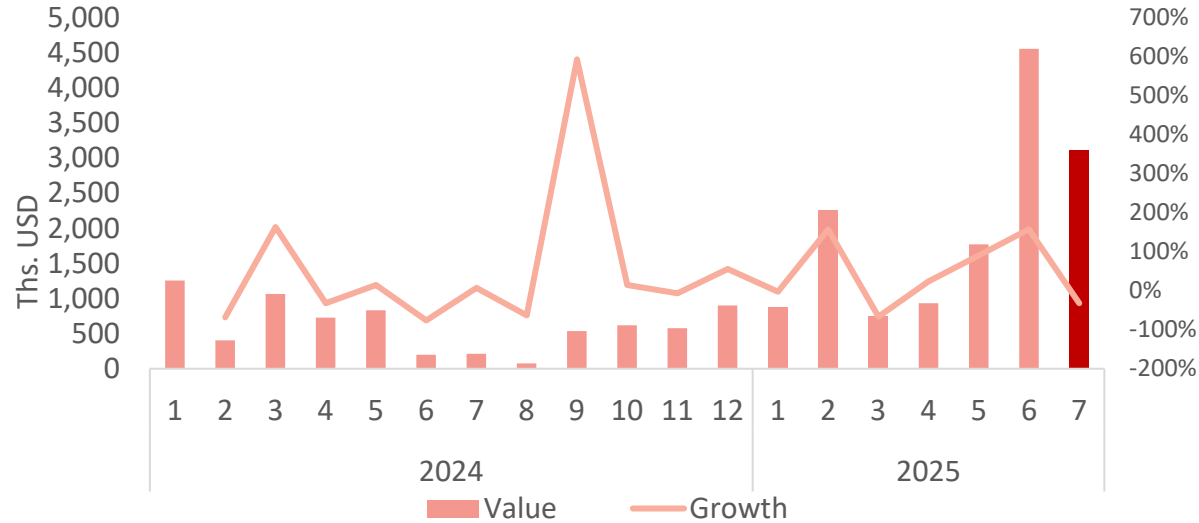
This impact was dominant in 66% of the surveyed districts. Drought—particularly during the flowering stage—has also been intensifying, while heat stress ranked third, affecting about 10% of the area. The research team recommended to expand shade tree coverage to mitigate microclimatic impacts—an approach that Yunnan authorities have been encouraging since 2012.

Source: [Dailycoffeenews.com](https://dailycoffeenews.com)



MEAT AND MEAT PRODUCTS (EXPORT)

Export value to China, Jul-2025



Export results to China, Jul-2025

VALUE



3.11
mil.USD

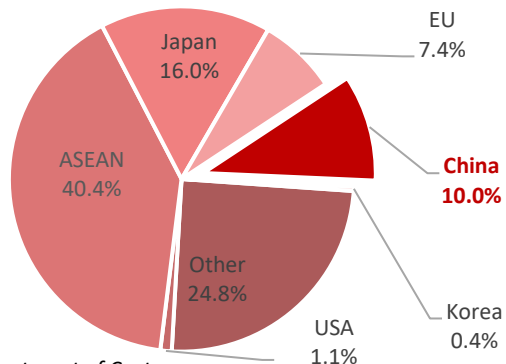
Decreased **32%** compared to Jun-2025

Increased **13 times** compared to Jul-2024

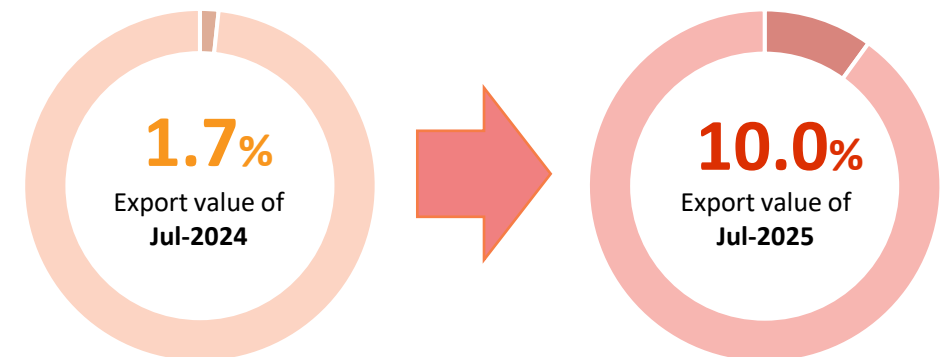
Increased **2.5 mil. USD** more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **14.3 mil. USD, 192.6%** of total 2024

Percentage of export value to China, Jul-2025



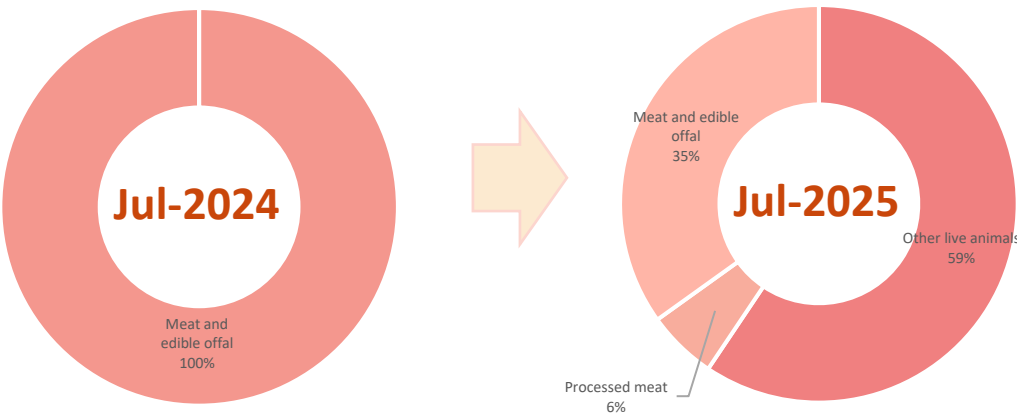
Changes in percentage of export value to China, Jul-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to China, Jul-2025



Export results to China, Jul-2025



Other live animals

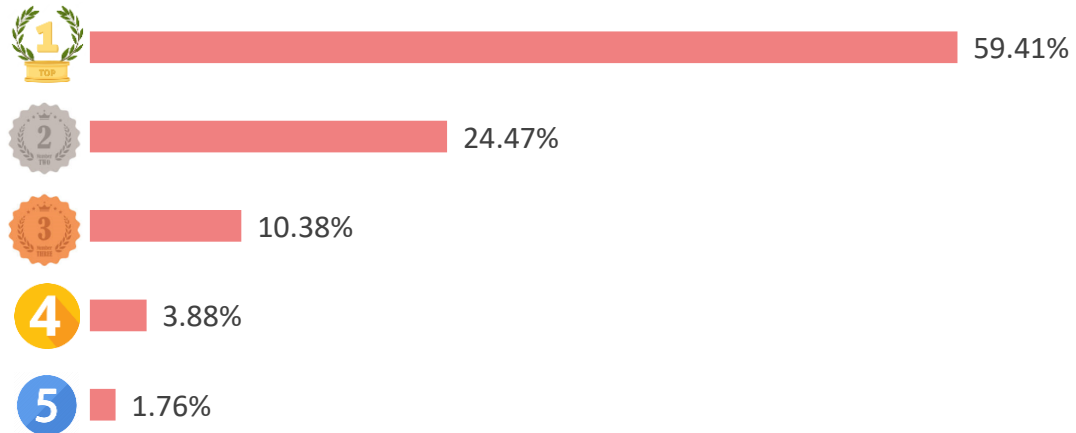
Value: **1.85** mil. USD
Decreased **51.9%** compared to Jun-2025



Meat and edible offal

Value: **1.086** mil. USD
Increased **52%** compared to Jun-2025
Increased **412%** compared to Jul-2024

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



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

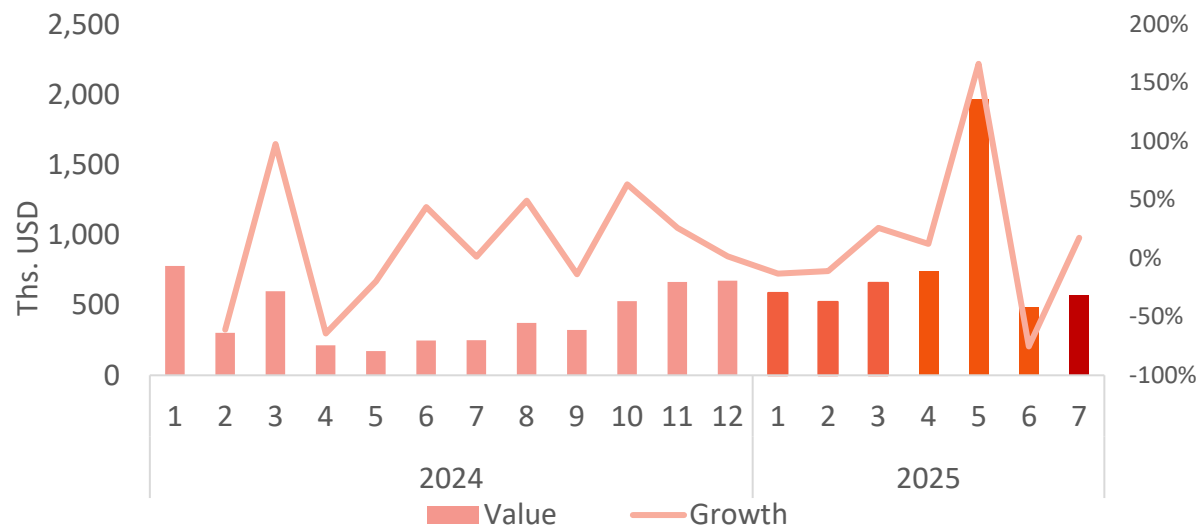


Source: Calculated from data of the Department of Customs



MEAT AND MEAT PRODUCTS (IMPORT)

Import value to China, Jul-2025



Import results to China, Jul-2025

VALUE

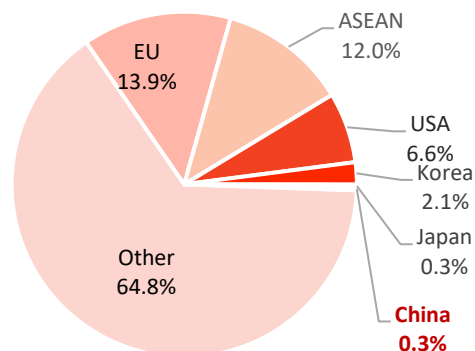


570.3

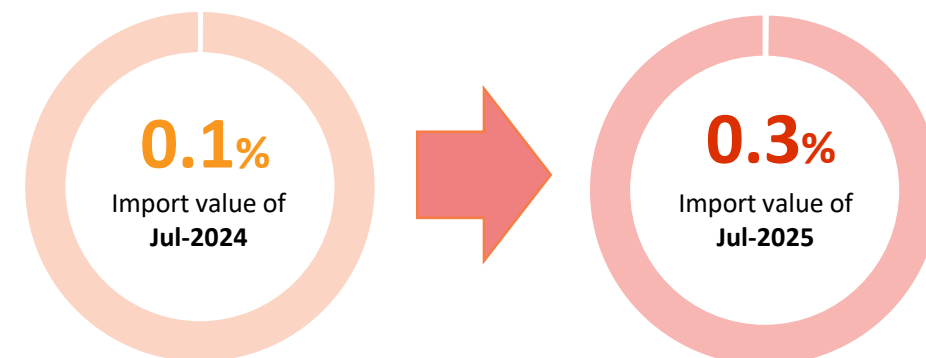
Nghìn USD

- ↗ Increased **17%** compared to Jun-2025
- ↗ Increased **128%** compared to Jul-2024
- ↗ **142.9** ths. USD more than the monthly average rate in 2024
- ◇ Accumulated 7 months of 2025 reaches **5.5 mil. USD, 107.9%** of total 2024

Percentage of import value to China, Jul-2025



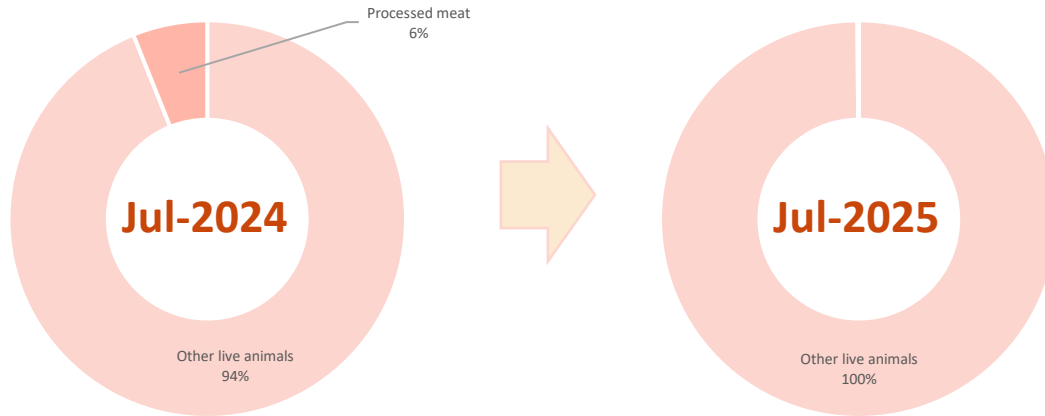
Changes in percentage of import value to China, Jul-2025





MEAT AND MEAT PRODUCTS (IMPORT)

Structure of imports by products from China, Jul-2025



Import results from China, Jul-2025



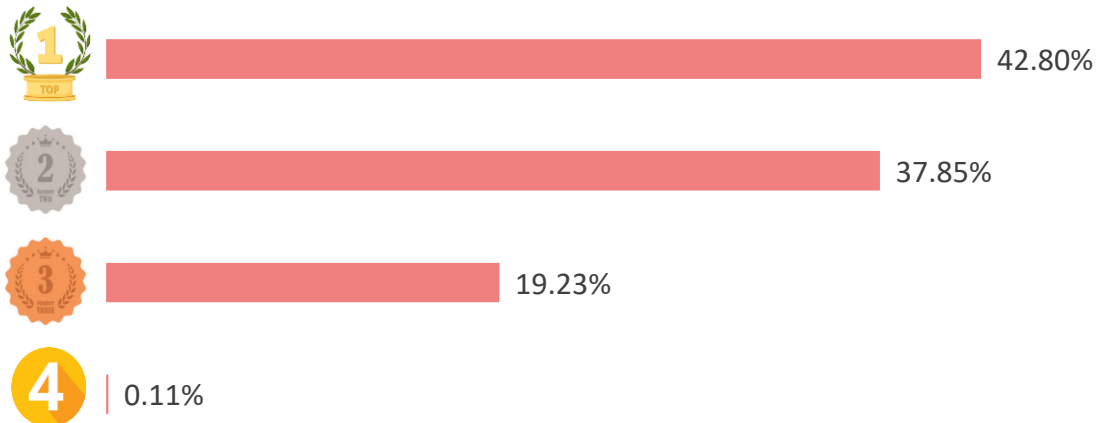
Other live animals

Value: **569.6** ths. USD

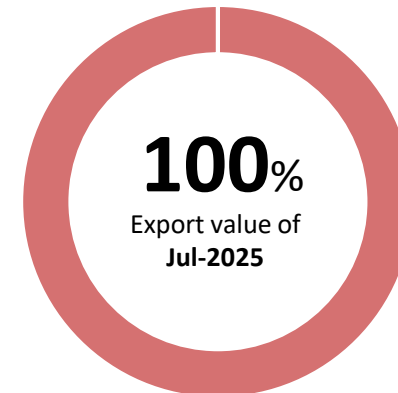
Increased **17.3%** compared to Jun-2025

Increased **141.9%** compared to Jul-2024

TOP 5 import enterprises by value from China, Jul-2025



Value ratio of TOP 5 import enterprises from China, Jul-2025





MEAT AND MEAT PRODUCTS

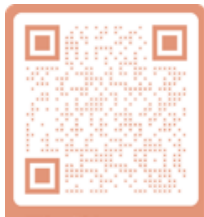
SPOTLIGHTS



China's hog farming sector is currently facing significant challenges due to oversupply and weak consumer demand. As of the end of June, the country's sow herd was 40.43 million head, above the average level of 39 million. In response, the Chinese government has implemented measures to curb "secondary fattening"—a speculative practice of extending the feeding period in anticipation of higher prices—while tightening controls on slaughter weights, with the goal of stabilizing the market.

According to Rabobank, China's pork production is expected to grow modestly in the second half of the year.

Source: Vietnambiz.vn





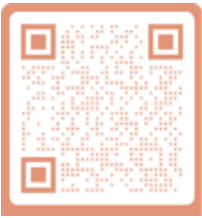
MEAT AND MEAT PRODUCTS

SPOTLIGHTS



China's Ministry of Agriculture and Rural Affairs reported that animal protein production continued to rise in Q2, pushing total output in the first half of 2025 to a record level. This result was mainly driven by poultry and beef production, which reached 12.7 million tons and 3.42 million tons, respectively. Poultry accounted for more than 60% of total output, pork about 30%, and beef around 10%.

Source: [Ukragroconsult.com](https://ukragroconsult.com)





Any comments. please send to:

CENTER FOR INFORMATION AND SERVICES IN AGRICULTURE AND ENVIRONMENT

INSTITUTE OF STRATEGY AND POLICY ON AGRICULTURE AND ENVIRONMENT

Address: 16 Thuy Khue Street. Tay Ho Wd.. Hanoi

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

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

