

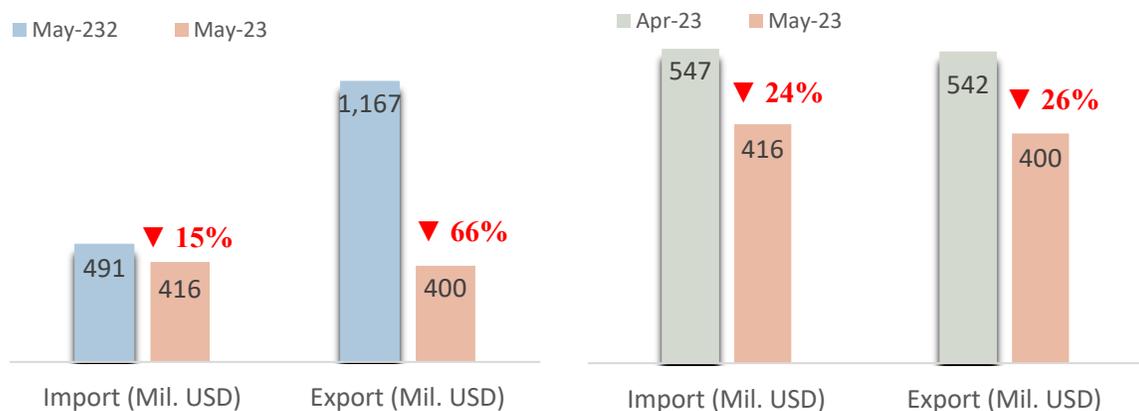
# MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **ASEAN MARKET**

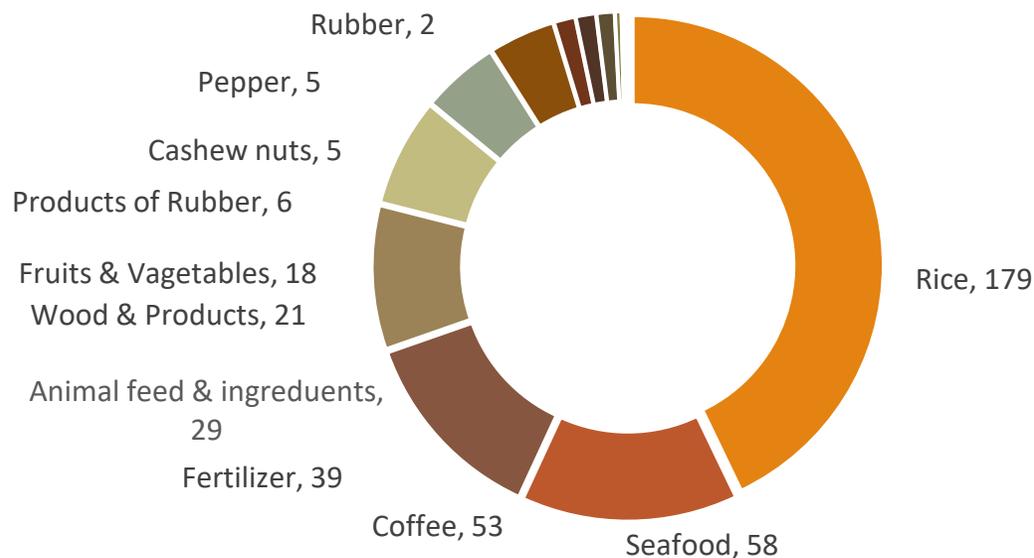


# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN APRIL 2023

## AFF product Import- Export turnover between Vietnam – ASEAN, May-2023

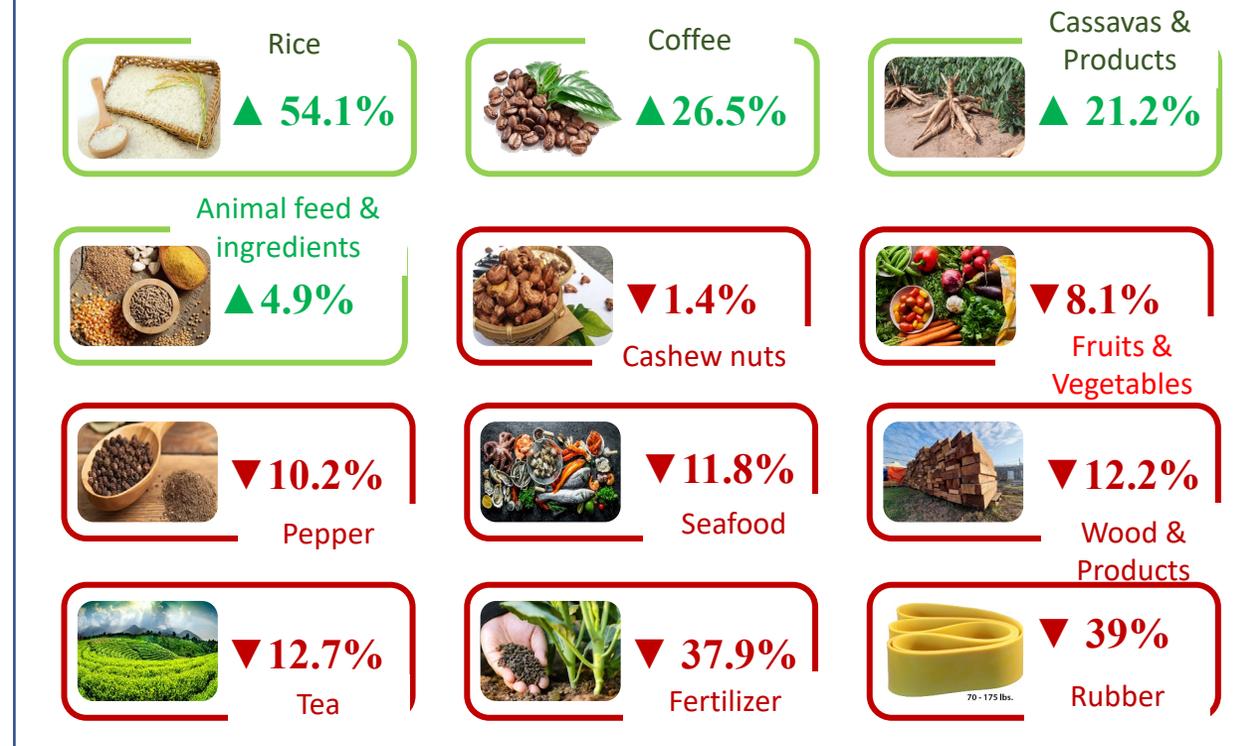


## AFF key product export value to the ASEAN, May-2023

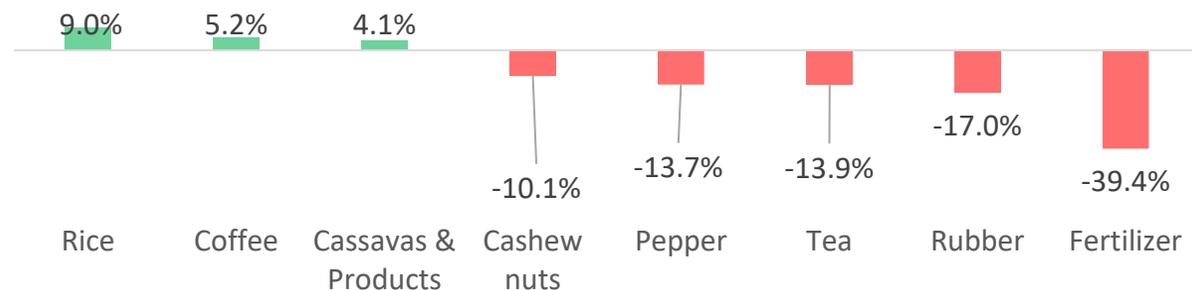


Unit: Mil. USD

## Change key product export value to the ASEAN in May-2022 compared to May-2023



## Change in average export value of key AFF products to the ASEAN in May-2022 compared to May-2023



Source: Calculated from data of the General Department of Customs

# SPOTLIGHTS

## Third Round of ASEAN-China FTA 3.0 Upgrade Negotiations

ASEAN and China convened the Third Round of the ASEAN-China FTA (ACFTA) 3.0 Upgrade Negotiations on 24 – 27 June 2023 in Kunming, China. Following the launch of the ACFTA 3.0 upgrade negotiations at the 25th ASEAN-China Summit in 2022, the ACFTA Special Joint Committee and various Working Groups have been activated to start discussions on upgrading ACFTA to build a more inclusive, modern, comprehensive, and mutually beneficial ASEAN-China FTA.

Source: [asean.org](https://asean.org)



### Third Round of ASEAN-China FTA 3.0 Upgrade Negotiations

## ASEAN promotes the development of shaping strategy for carbon neutrality

Developing an ASEAN Carbon Neutral Strategy was discussed at the recent 9th ASEAN Economic Community (AEC) Dialogue at the ASEAN Secretariat headquarters in Indonesia. The ASEAN Secretariat organized the dialogue with the support of the Australian Government through the program "Australia for the Future of ASEAN-Economics and Connectivity".

The strategy will guide policymakers to take appropriate measures to ensure the region's carbon neutralization is equitable, safe, and inclusive. This strategy aims to accelerate the region's decarbonization towards net zero emissions, provide sustainable growth and maintain the competitiveness of member countries in global trade.

Source: [asean.org](https://asean.org)



### ASEAN promotes the development of shaping strategy for carbon neutrality



# RICE

## Export volume and value of rice to the ASEAN, May-2023



## Export results to the ASEAN, May -2023

**VALUE**  
**182.1** Mil. USD

↘ Decrease **44.0%** compared to Apr-2023

↗ Increase **19.7%** compared to May-2022

↗ **43.9 Mil. USD** more than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **1.1 Bil. USD, 66.1%** of the total 2022

**VOLUME**  
**355.8** Thousand tons

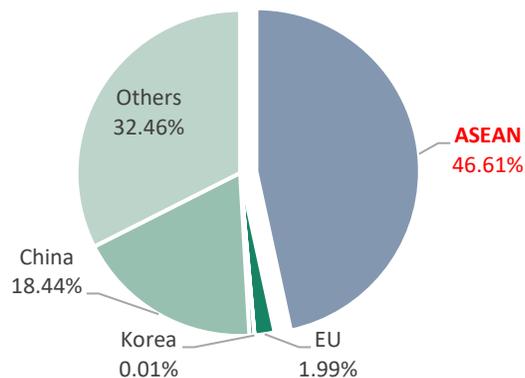
↘ Decrease **45.9%** compared to Apr-2023

↗ Increase **10.9%** compared to May-2022

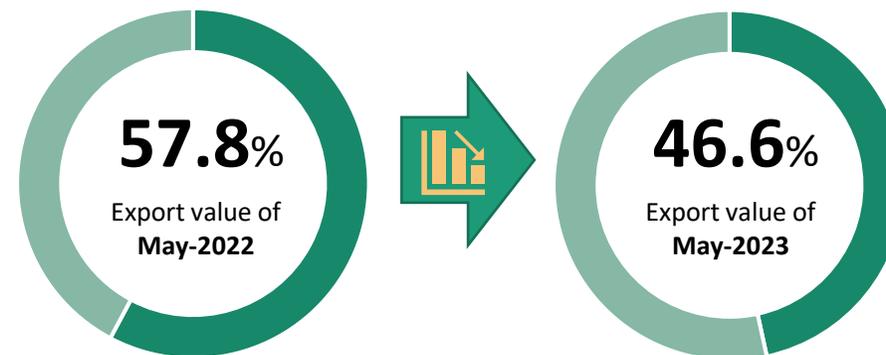
↗ **63.6 Thousand tons** more than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **2.2 Mil. tons, 62.4%** of total 2022

## Percentage of export value to the ASEAN, May-2023



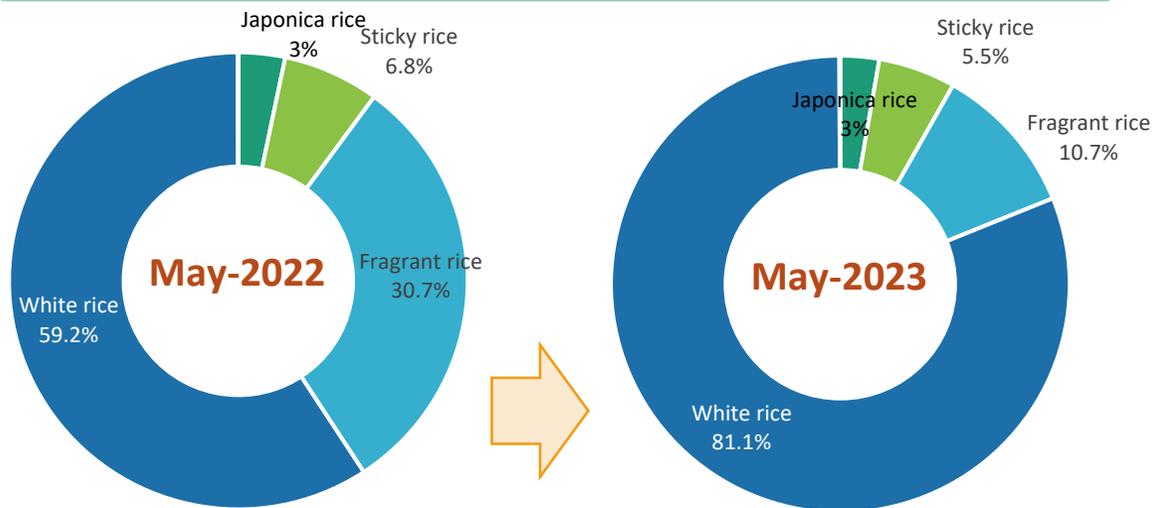
## Changes in the percentage of export value to the ASEAN, May-2023





# RICE

## Structure of exports by products to the ASEAN



## Export results to the ASEAN, May-2023



### White Rice

Value: **147.6** Mil. USD  
 Decrease **44%** compared to Apr-2023  
 Increase **24%** compared to May-2022

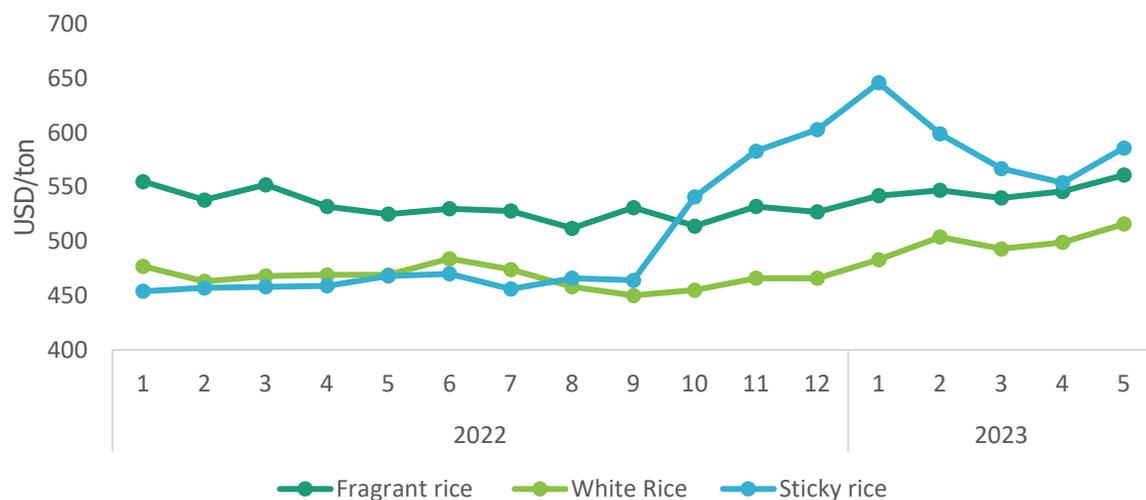
### Fragrant rice

Value: **19.4** Mil. USD  
 Decrease **58%** compared to Apr-2023  
 Decrease **68%** compared to May-2022

### Sticky rice

Value: **9.9** Mil. USD  
 Decrease **0.2%** compared to Apr-2023  
 Decrease **27%** compared to May-2022

## Average export rice price to the ASEAN, May-2023



### Sticky rice

The average export in May-2023 is **586** USD/ton; **increase 6%** compared to the previous month; and **increase 25%** compared to the same month of 2022.

### Fragrant rice

The average export in May-2023 is **561** USD/ton; **increase 3%** compared to the previous month; and **increase 7%** compared to the same month of 2022.

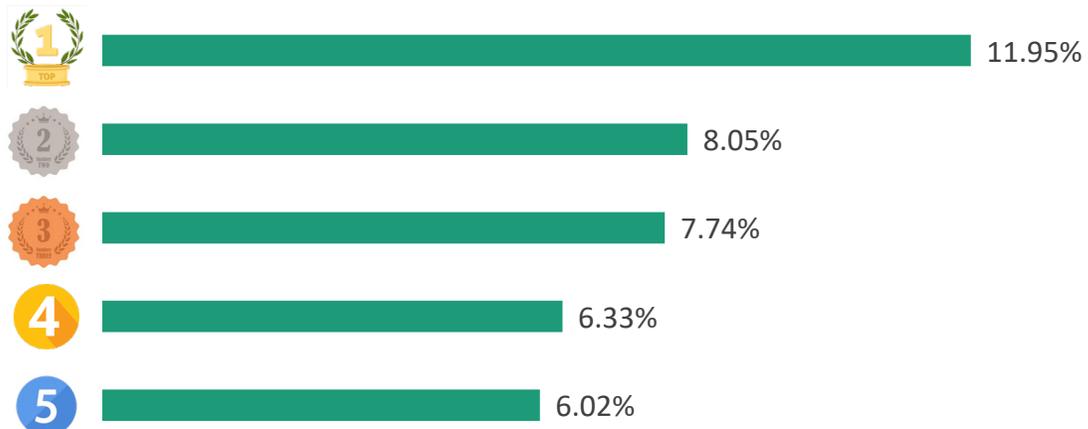
### White Rice

The average export in May-2023 is **516** USD/ton; **increase 3%** compared to the previous month; and **increase 10%** compared to the same month of 2022.

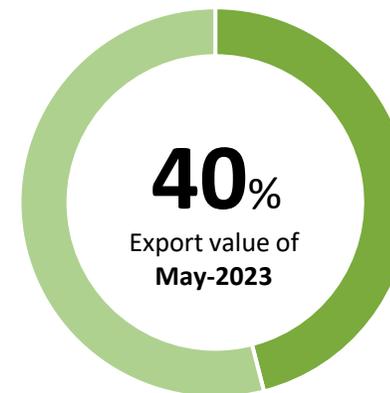


# RICE

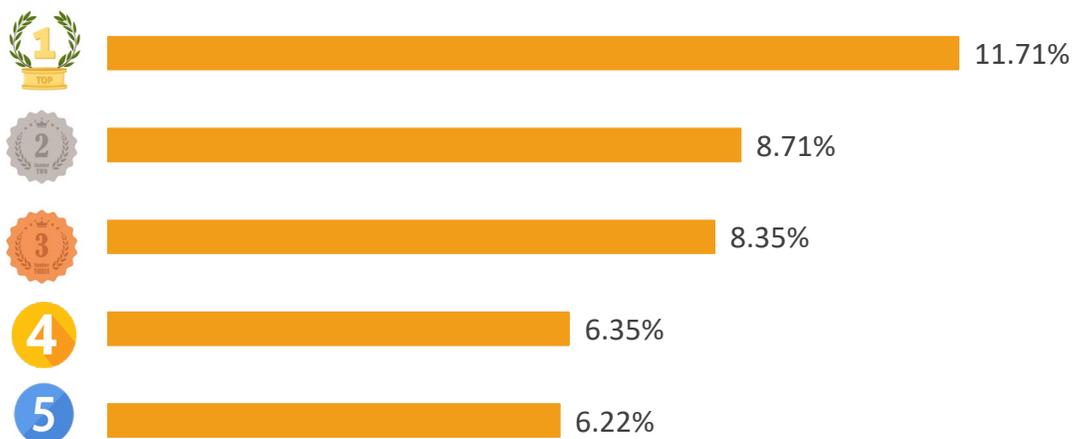
## TOP 5 export enterprises by value to the ASEAN, May 2023



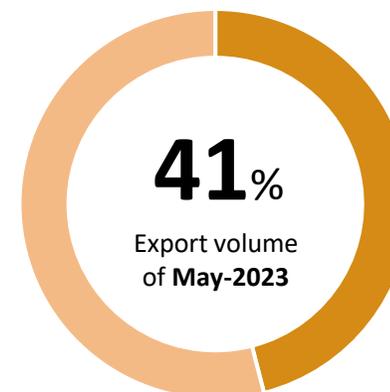
## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023



## TOP 5 export enterprises by volume to the ASEAN, May 2023



## Volume ratio of TOP 5 export enterprises to the ASEAN, May 2023





# RICE

## SPOTLIGHT

01

President Marcos has set an ambitious target for the Philippines to achieve 97.5% rice self-sufficiency within five years. This target will be pursued through a comprehensive program of agricultural initiatives aimed at supporting farmers, increasing rice production, and improving the overall performance of the rice value chain.

*Source: Philstar.com*

02

According to the Kasikorn Research Center, this year's Thai rice production is projected to decrease by 6% to a range of 25.1 to 25.6 million tons. This decline is primarily attributed to the impact of El Nino, which can lead to drought conditions and negatively affect rice crops.

*Source: Thaipbsworld.com*

03

According to the Myanmar Rice Association, the country's exports in May 2023 decreased to 46,786 tons compared with 94,691 tons in the same period last year. Broken rice exports in May 2023 stood at 63,920 tons compared with 58,816 tons in the same period in 2022. Myanmar mainly exports rice and broken rice to Turkey, Spain, Bulgaria, Poland, and Portugal.

*Source: Xinhuanet*



# COFFEE



## Export volume and value to the ASEAN, May-2023



## Export results to the ASEAN, May-2023

### VALUE

**53.1** Mil. USD

↑ Increase **10.5%** compared to Apr-2023

↑ Increase **25.6%** compared to May-2022

↑ **22.1** Mil. USD more than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **201.8** Mil. USD, **54.1%** of the total 2022

### VOLUME

**17.8** Thousand tons

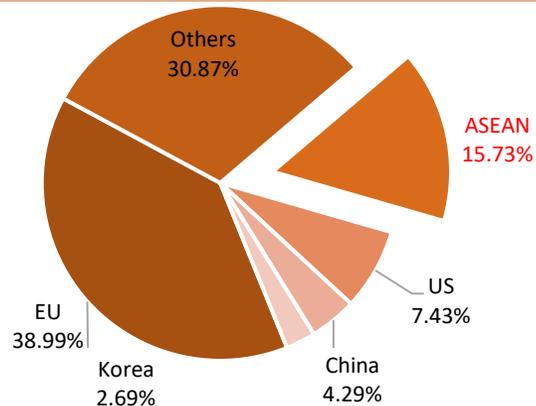
↑ Increase **18.3%** compared to Apr-2023

↑ Increase **19.4%** compared to May-2022

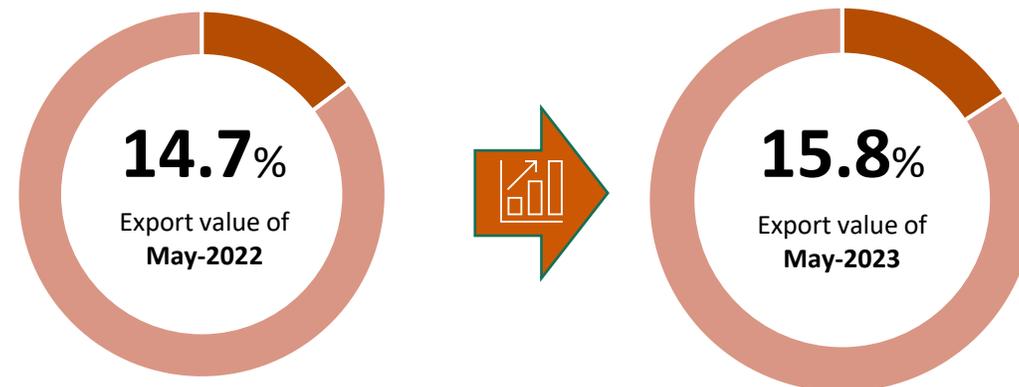
↑ **7.2** Thousand tons more than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **64.6** Thousand tons, **50.8%** of the total 2022

## Percentage of export value to the ASEAN, May-2023

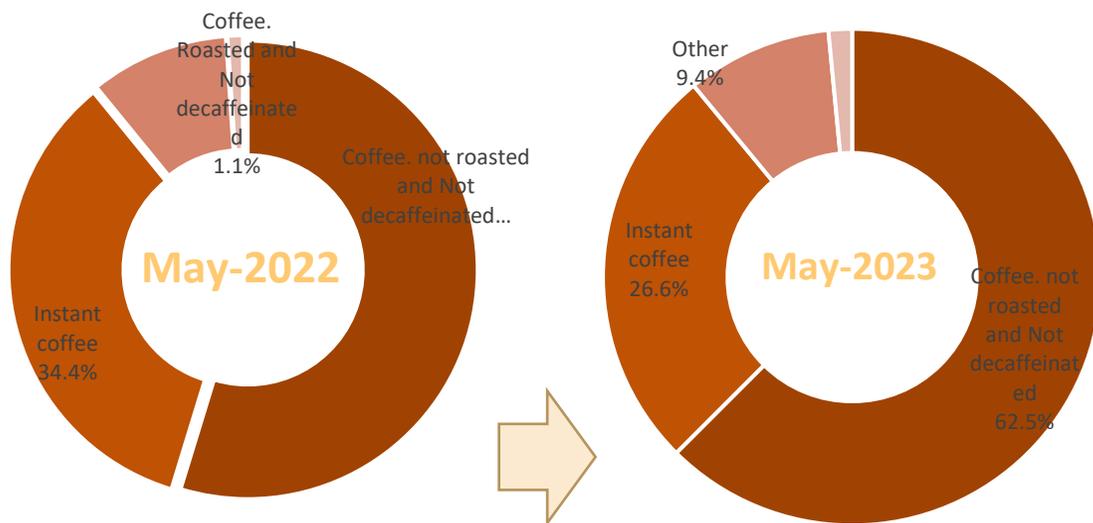


## Changes in percentage of export value to the ASEAN, May-2023

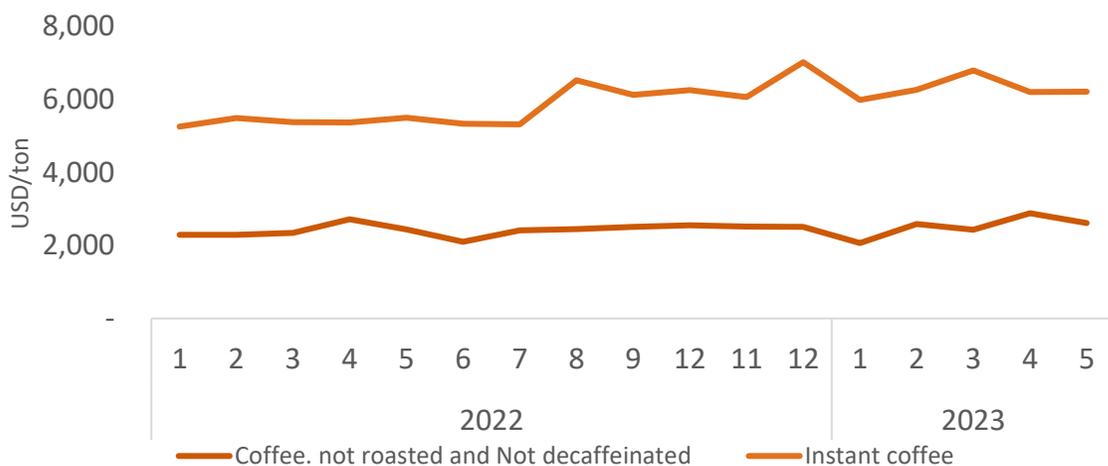


# COFFEE

## Structure of exports by products to the ASEAN



## Average export price to the ASEAN, May 2023



## Export results to the ASEAN. May-2023



### Coffee, not roasted and Not decaffeinated

Value: **33.1** Mil. USD  
 Increase **18%** compared to Apr-2023  
 Increase **43%** compared to May-2022



### Instant coffee

Value: **14.1** Mil. USD  
 Increase **11.2%** compared to Apr-2023  
 Decrease **3.4%** compared to May-2022



### Coffee, Roasted and Not decaffeinated

Value: **0.8** Mil. USD  
 Decrease **2%** compared to Apr-2023  
 Increase **76.3%** compared to May-2022

### Instant coffee

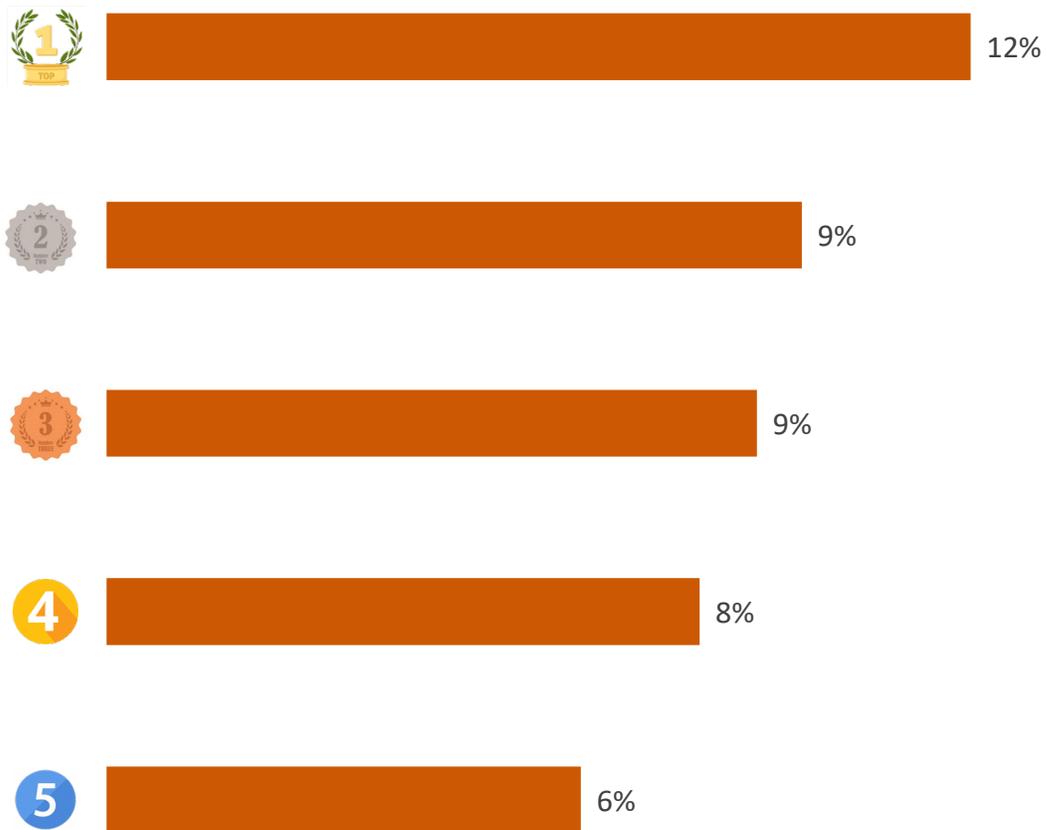
The average export in May-2023 is **6.215** USD/ton; increase **0.2%** compared to the previous month; and increase **13%** compared to the same month of 2022.

### Coffee, not roasted and Not decaffeinated

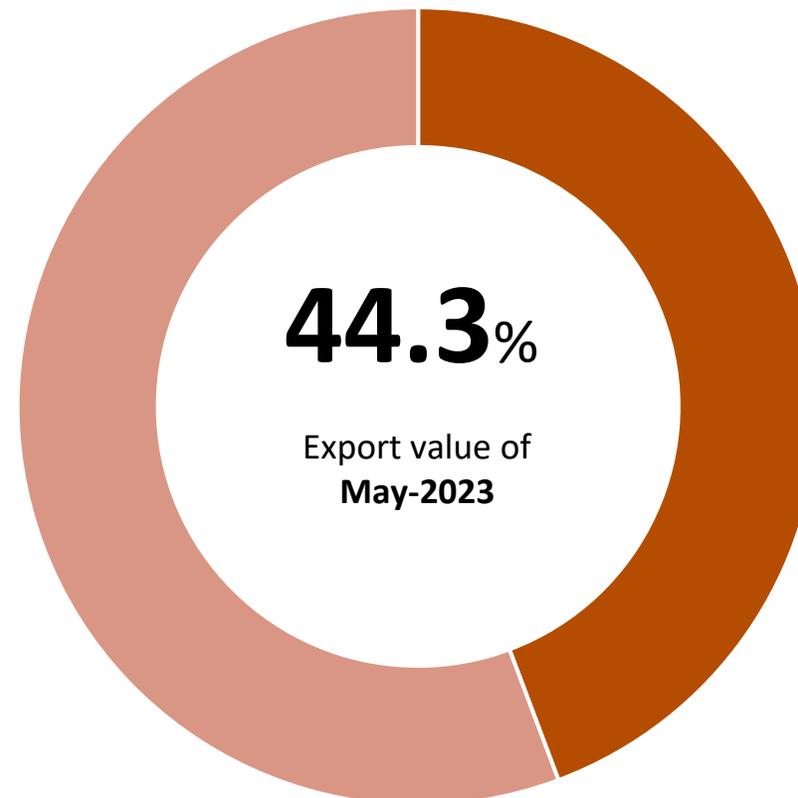
The average export in May-2023 is **2.613** USD/ton; decrease **9.5%** compared to the previous month; but increase **7%** compared to the same month of 2022.

# COFFEE

## TOP 5 export enterprises by value to the ASEAN, May 2023



## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023





## SPOTLIGHT

### **Indonesia's coffee production reaches 9.7 million bags in the crop year 2023/24**

According to USDA, Indonesia's coffee production was at 9.7 million bags in 2023/24, a decline of 18 percent from the previous year as excessive rainfall disrupted the cherry development stage, lowering yield in major Robusta-producing areas. In addition, 2023/24 Indonesia green bean exports are projected to decrease 32 percent from the previous year to 5.2 million bags on lower exportable supplies.

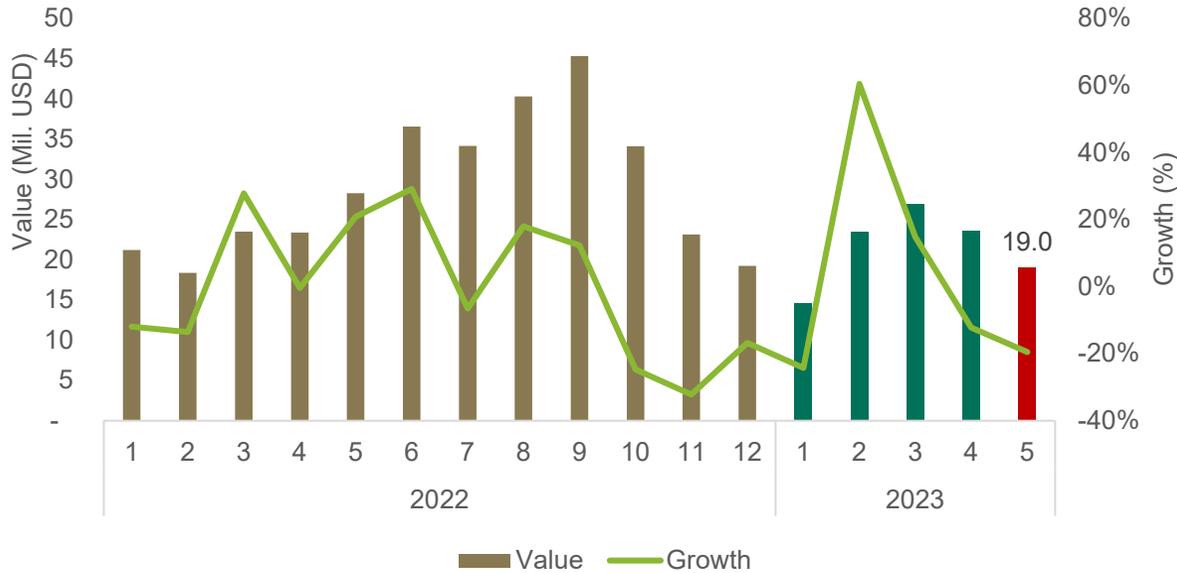
Source: *USDA(6/2023)*





# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, May-2023



## Export results to the ASEAN, May-2023

VALUE

19

Mil. USD

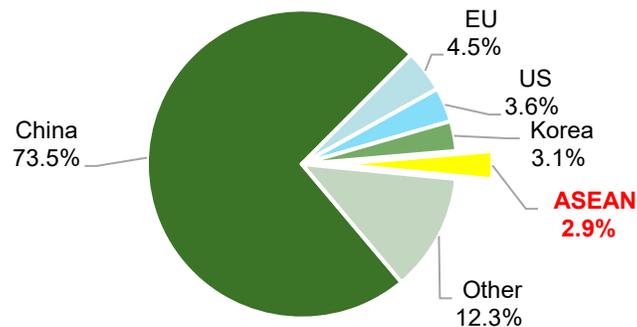
Decrease **19.5%** compared to Apr-2023.

Decrease **32.7%** compared to May-2022.

**9.95 Mil. USD** less than the monthly average rate in 2022

Accumulated five months of 2023 reaches **107.6 Mil. USD**, **30.9%** of the total 2022

## Percentage of export value to the ASEAN, May-2023



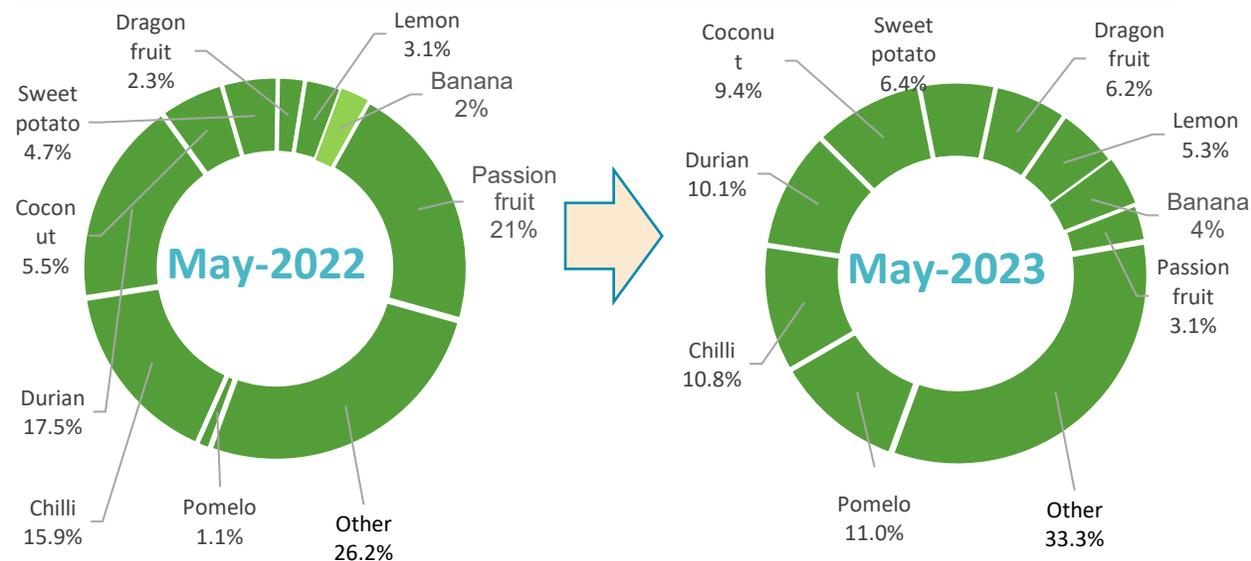
## Changes in percentage of export value to the ASEAN, May-2023





# FRUITS AND VEGETABLES (EXPORT)

## Structure of exports by products to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### Pomelo

Value: **2.1** Mil. USD  
 Decrease **18.9%** compared to Apr-2023  
 Increase **589.9%** compared to May-2022



### Chilli

Value: **2.1** Mil. USD  
 Increase **1.5%** compared to Apr-2023  
 Decrease **54.4%** compared to May-2022



### Durian

Value: **1.9** Mil. USD  
 Decrease **21.3%** compared to Apr-2023  
 Decrease **61.0%** compared to May-2022



### Coconut

Value: **1.8** Mil. USD  
 Increase **25.0%** compared to Apr-2023  
 Increase **15.5%** compared to May-2022



### Sweet potato

Value: **1.2** Mil. USD  
 Increase **22.3%** compared to Apr-2023  
 Decrease **8.6%** compared to May-2022



### Dragon fruit

Value: **1.2** Mil. USD  
 Decrease **25.6%** compared to Apr-2023  
 Increase **83.9%** compared to May-2022



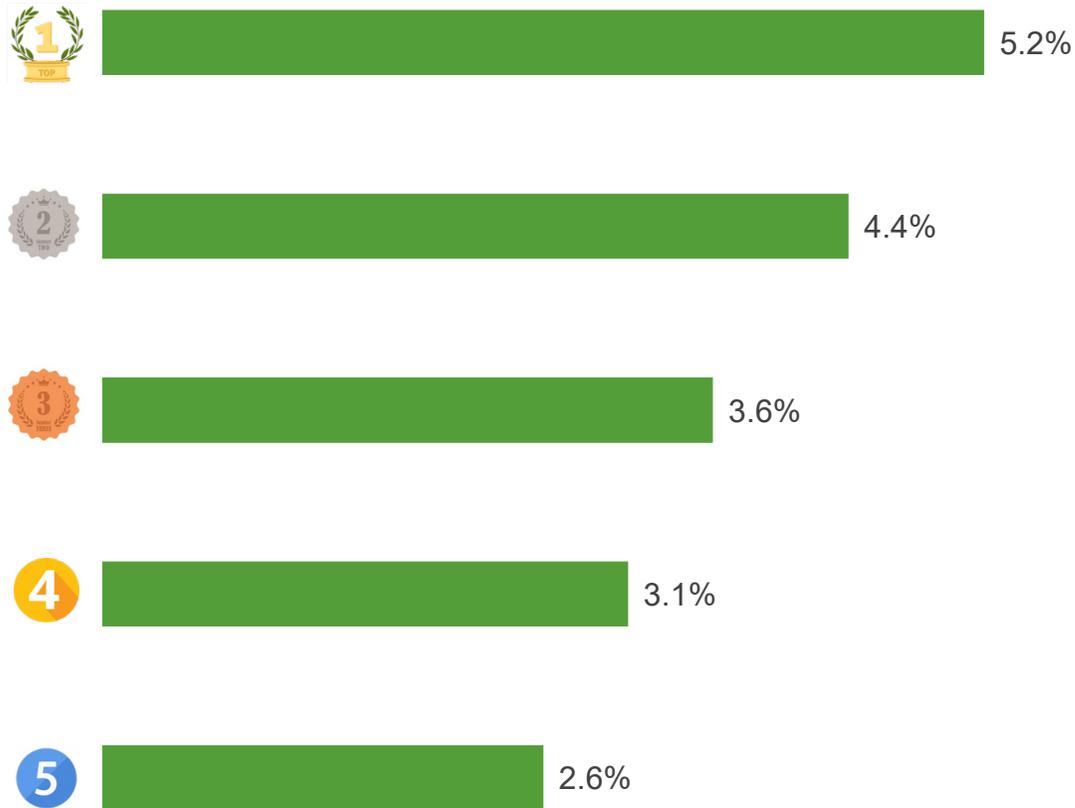
### Lemon

Value: **1.0** Mil. USD  
 Decrease **47.3%** compared to Apr-2023  
 Increase **15.3%** compared to May-2022

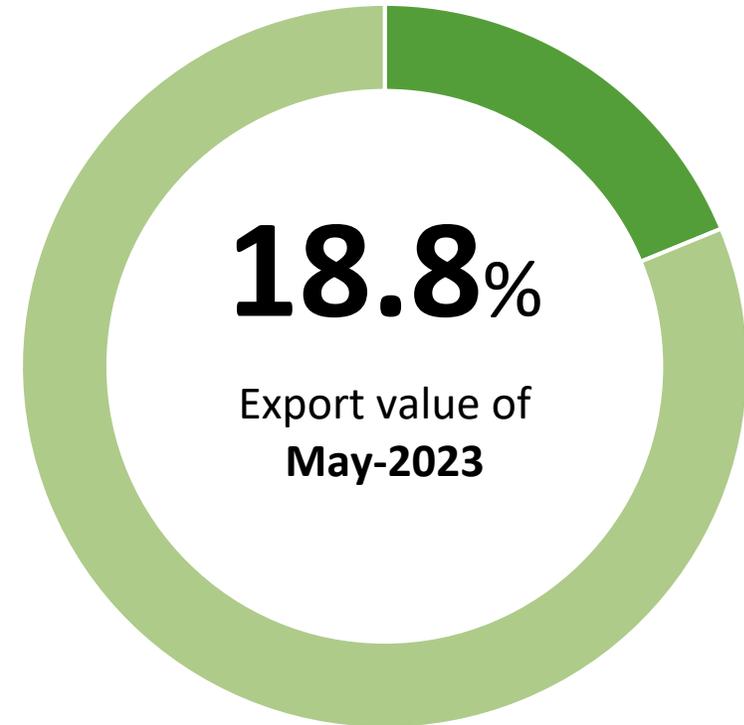


# FRUITS AND VEGETABLES (EXPORT)

## TOP 5 export enterprises by value to the ASEAN, May 2023



## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023





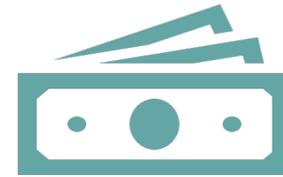
# FRUITS AND VEGETABLES (IMPORT)

## Import volume and value from the ASEAN, May-2023



## Import results from the ASEAN, May-2023

Value



17.9

Mil. USD

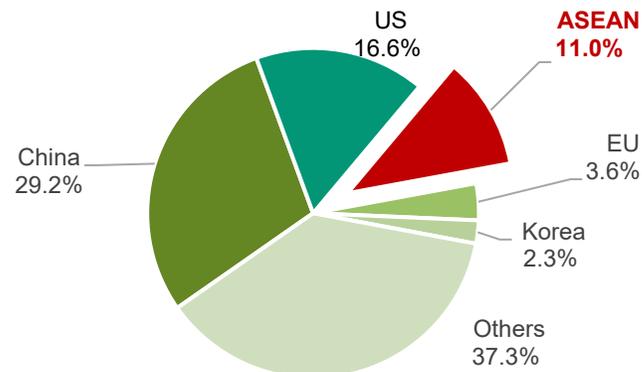
Decrease **10.1%** compared to Apr-2023

Decrease **16.0%** compared to May-2022

**4.4 Mil. USD** less than the monthly average rate in 2022

Accumulated five months of 2023 reaches **99.9 Mil. USD**, **37.4%** of the total 2022

## Percentage of import value from the ASEAN, May-2023



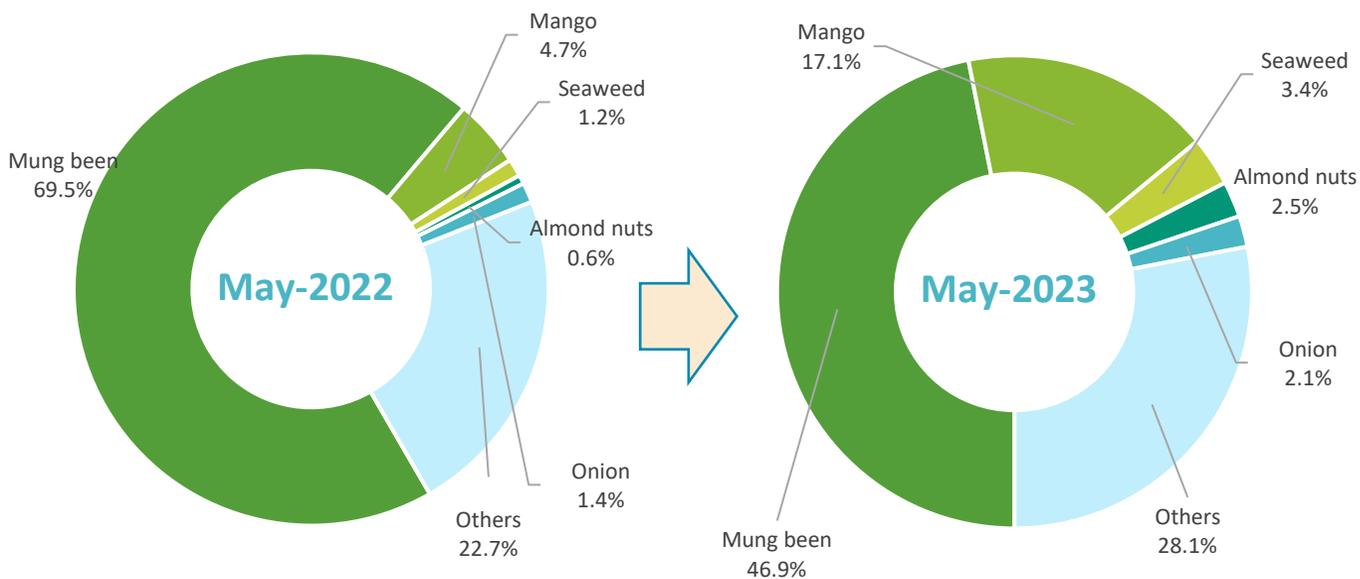
## Changes in percentage of import value from the ASEAN, May-2023





# FRUITS AND VEGETABLES (IMPORT)

## Structure of imports by products from the ASEAN, May-2023



### Seaweed

Value: **0.6** Mil. USD

Increase **51.9%** compared to Apr-2023

Increase **132.8%** compared to May-2022



### Almond nuts

Value: **0.44** Mil. USD

Increase **504 times** compared to Apr-2023

Increase **238.3%** compared to May-2022



### Onions

Value: **0.38** Mil. USD

Increase **212.6%** compared to Apr-2023

Increase **31.6%** compared to May-2022

## Import results form the ASEAN, May-2023



### Mung bean

Value: **8.4** Mil. USD

Decrease **8.5%** compared to Apr-2023

Decrease **43.3%** compared to May-2022



### Mango

Value: **3.1** Mil. USD

Decrease **19.5%** compared to Apr-2023

Increase **206.5%** compared to May-2022

# FRUITS AND VEGETABLES

## SPOTLIGHT

01

According to the Thailand Ministry of Agriculture and Cooperatives, the United States has recently granted approval for the import of freshly irradiated pomelos from Thailand. This development marks the removal of restrictions on pomelo varieties, allowing a broader range of Thai pomelos to be imported into the US market starting from June 2023. pomelo becomes the 8th Thai fruit to be allowed for importation into the United States, joining other popular Thai fruits such as mango, mangosteen, rambutan, longan, litchi, pineapple, and dragon fruit. Up to now, Thailand has exported fresh pomelo to 30 countries, with China and Malaysia serving as the main markets.

*Source: Bangkokpost*

02

According to the Bank of Thailand, the Thai durian industry is currently facing competition from other countries such as Vietnam (China set to open its market to Vietnamese durians in 2022), Laos (pending licensing), and Cambodia. The Bank of Thailand proposed that the durian industry find new export markets, especially second-tier cities in China and other countries, and apply agricultural technology to improve productivity and develop logistics systems.

*Source: Guojiguoshu.com*

03

Indonesia's National Food Authority (Bapanas) has pushed the Ministry of Commerce of this country to issue an import license so that the trading and transportation of these items will stall the survival mode and raise prices. The demand for this water is forecast to be 669,354 tons this year, about 600,000 tons of which will be answered through imports. However, only 176,000 tons of import permits were issued at the end of May, accounting for 73% of the quota.

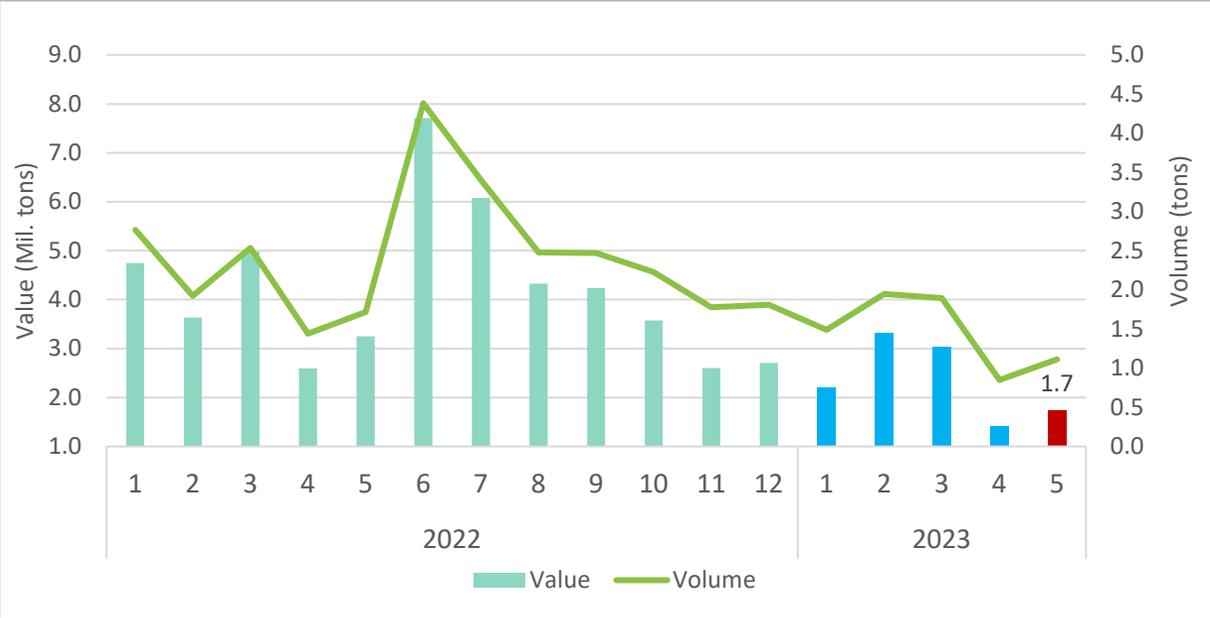
*Source: Thejakartapost.com*





# RUBBER

## Export volume and value to the ASEAN, May-2023



## Export results to the ASEAN, May-2023

### VALUE

**1.74** Mil. USD

↗ Increase **23.4%** compared to Apr-2023

↘ Decrease **46.3%** compared to May-2022

↓ **2.5 Mil. USD** less than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **11.7 Mil. USD**, **23.2%** of total 2022

### VOLUME

**1.11** Thousand tons

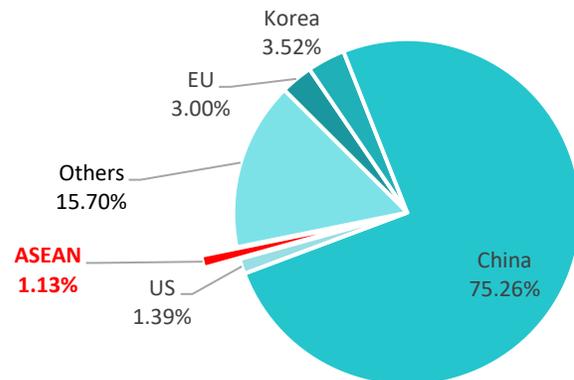
↗ Increase **31.0%** compared to Apr-2023

↘ Decrease **35.3%** compared to May-2022

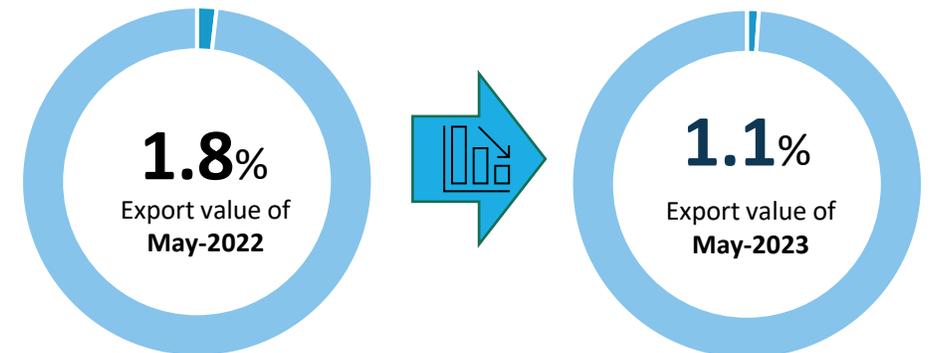
↓ **1.3 Thousand tons** less than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **7.3 Thousand tons**, **25.2%** of total 2022

## Percentage of export value to the ASEAN, May-2023



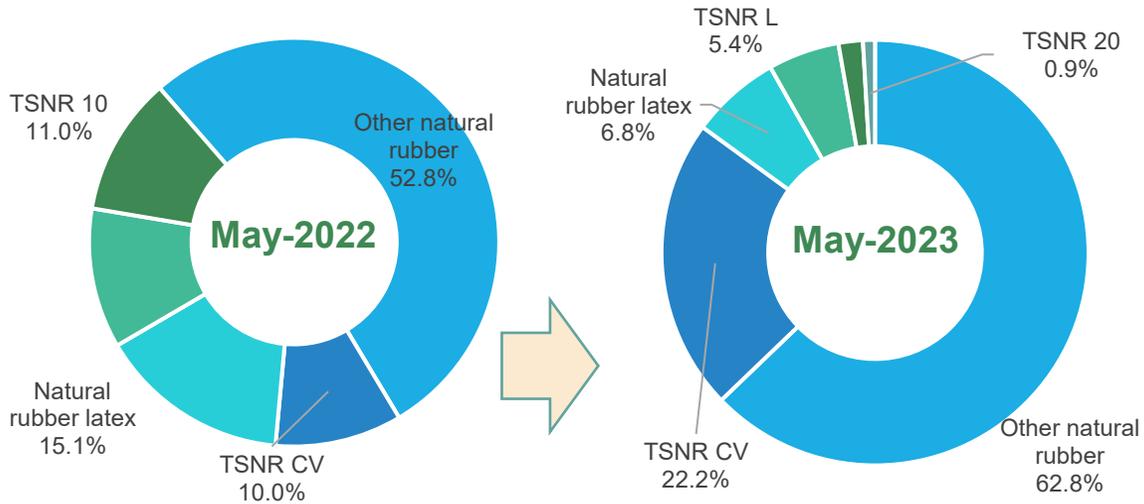
## Changes in the percentage of export value to the ASEAN, May-2023





# RUBBER

## Structure of exports by products to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### Other natural rubber

Value: **1.1** Mil. USD  
 Increase **12.8%** compared to Apr-2023  
 Decrease **27.4%** compared to May-2022



### TSNR CV

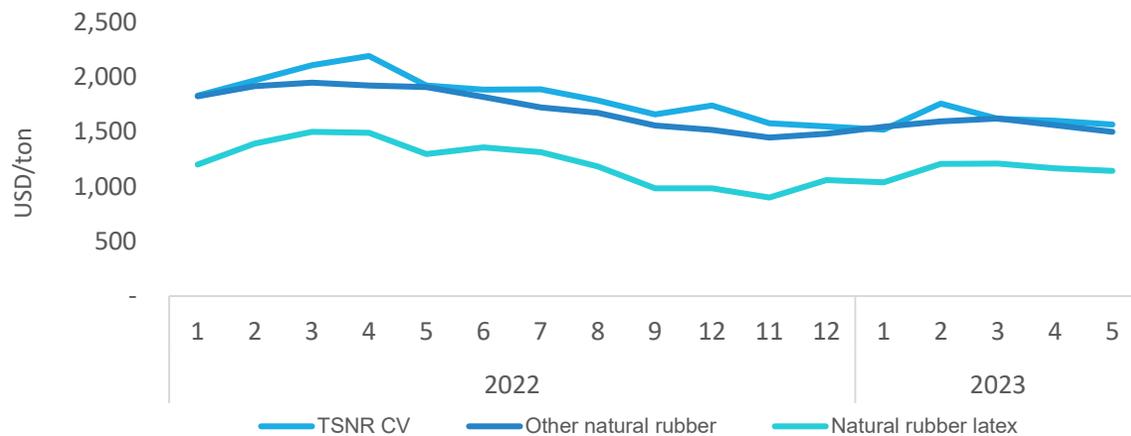
Value: **0.4** Mil. USD  
 Increase **220.7%** compared to Apr-2023  
 Increase **35.8%** compared to May-2022



### Natural rubber latex

Value: **0.11** Mil. USD  
 Increase **382.6%** compared to Apr-2023  
 Decrease **72.5%** compared to May-2022

## Average export price to the ASEAN, May-2023



### Other natural rubber

The average export in May-2023 is **1.500** USD/ton; **decrease 4.0%** compared to the previous month; and **decrease 21.5%** compared to the same month of 2022.

### TSNR CV

The average export in May-2023 is **1.567** USD/ton; **decrease 2.1%** compared to the previous month; and **decrease 18.6%** compared to the same month of 2022.

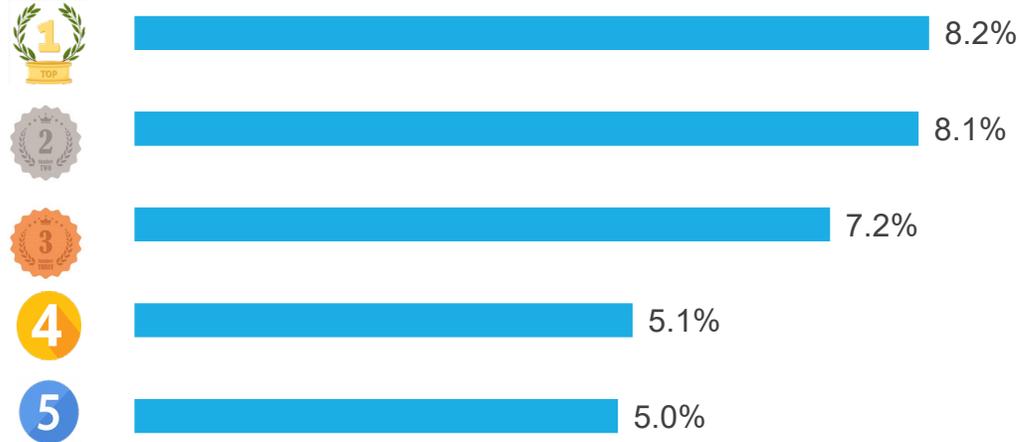
### Natural rubber latex

The average export in May-2023 is **1.144** USD/ton; **decrease 1.9%** compared to the previous month; and **decrease 11.9%** compared to the same month of 2022.

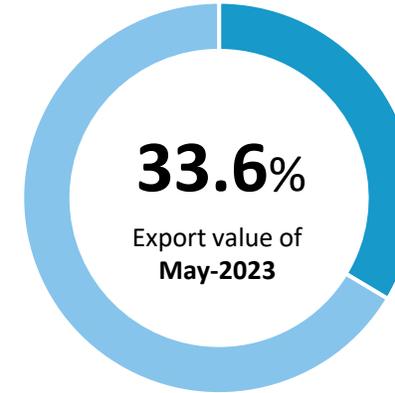


# RUBBER

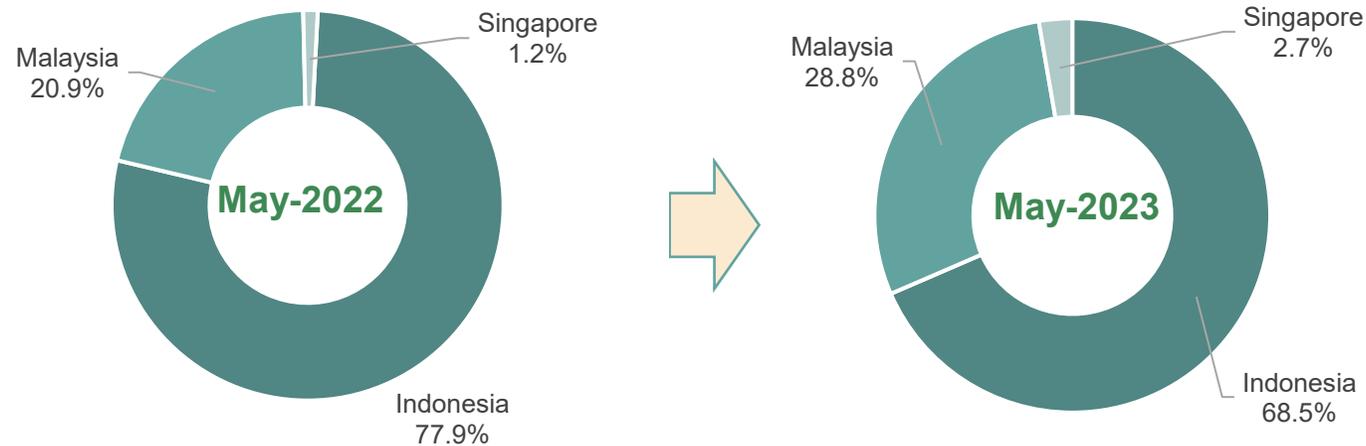
## TOP 5 export enterprises by value to the ASEAN, May-2023



## Value ratio of TOP 5 export enterprises to the ASEAN, May-2023



## Percentage of import value from some country of the ASEAN, May-2023





# RUBBER

## SPOTLIGHT



❖ The Association of Natural Rubber Producing Countries (ANRPC) has adjusted the general situation of the natural rubber market in 2023. Among the major natural rubber-producing countries in the ASEAN region, Natural rubber increased in Thailand (2.5%) and in Indonesia (1.8%). Production in Vietnam and other countries is expected to increase by 0.1% and 2.8%, respectively. Malaysia will be the country with the most prominent growth, with output expected to increase by 11.4%.

At the same time, the consumption of natural rubber in Thailand will decline sharply, with a forecast decrease of 26%. Consumption in Malaysia and Vietnam is expected to grow by 5.8% each. Consumption growth in other countries has been slower, with an expected increase of 0.6%

❖ Indonesia's natural rubber exports fell 16% in the first four months of 2023, reaching 622,000 tons. However, Indonesia's natural rubber exports to China increased by 66% year-on-year, reaching 103,000 tons. Despite the decrease in total export volume, Indonesia's high natural demand in the Chinese market has increased significantly, becoming one of the main factors driving export growth.

❖ According to the Malaysian Bureau of Statistics, in April 2023, Malaysia's natural rubber export volume dropped sharply. The natural rubber export volume was 37,728 tons, down 35.6% over the same period last year and down 17.6% from the previous month. China is the largest natural rubber importer, accounting for 48.4% of Malaysia's total exports, followed by Germany (11.7%), Pakistan (5.6%), Turkey (3.9%) and Portugal (3.3%). Meanwhile, imports in the month were 56,608 tons, down 45.9% over the same period and down 42.1% month on month. The main types of imports include standard rubber, natural rubber latex and natural rubber in other forms. Thailand, Côte d'Ivoire, the Philippines and Myanmar are the main sources of natural rubber imports from Malaysia.





# CASHEW NUTS

## Export volume and value to the ASEAN, May-2023



## Export results to the ASEAN, May-2023

**VALUE**

**8.9** Mil. USD

- ↗ Increase **0.3%** compared to Apr-2023
- ↗ Increase **11%** compared to May-2022
- ↗ **1.1 Mil. USD** more than the monthly average rate in 2022

Accumulated five months of 2023 reaches **42.8** Mil. USD, **46%** of total 2022

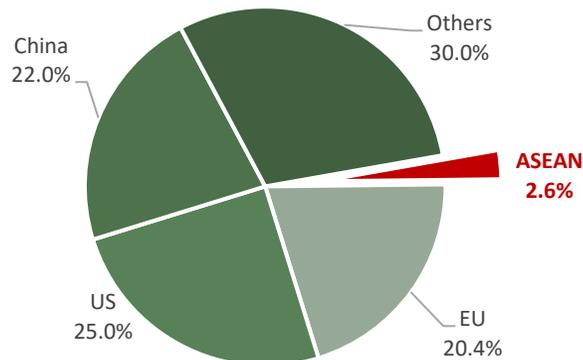
**VOLUME**

**1.9** Thousand tons

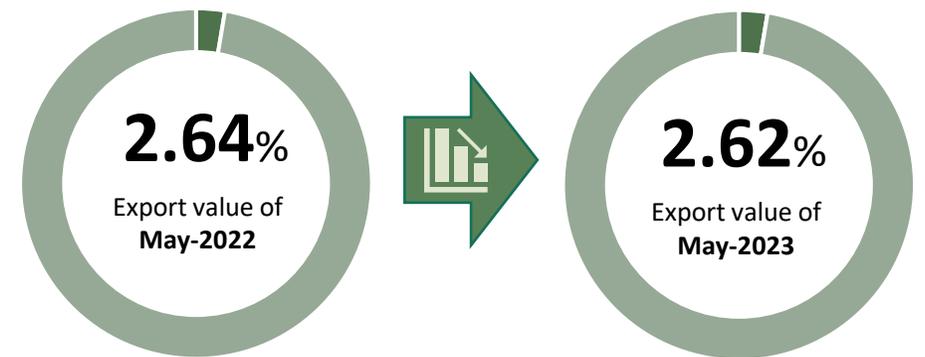
- ↘ Decrease **61%** compared to Apr-2023
- ↗ Increase **26%** compared to May-2022
- ↗ **318 USD** more than the monthly average rate in 2022

Accumulated five months of 2023 reaches **12.4** thousand tons, **67%** of total 2022

## Percentage of export value to the ASEAN, May-2023



## Changes in percentage of export value to the ASEAN, May-2023

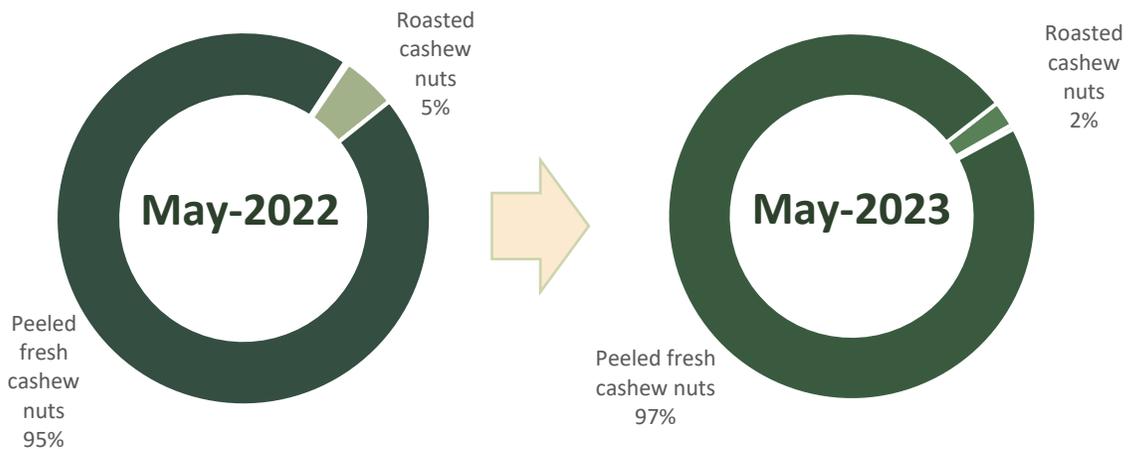


Source: Calculated from data of the General Department of Customs

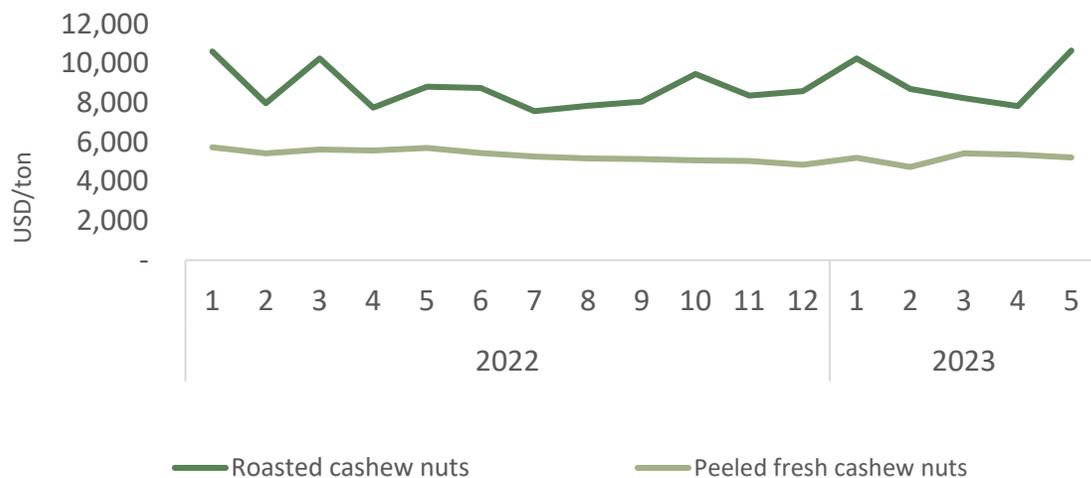


# CASHEW NUTS

## Structure of exports by products to the ASEAN, May-2023



## Average export price to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### Peeled fresh cashew nuts

Value: **8.6** Mil. USD

Increase **4.3%** compared to Apr-2023

Increase **13.9%** compared to May-2022



### Roasted cashew nuts

Value: **0.2** Mil. USD

Decrease **63.1%** compared to Apr-2023

Decrease **46.6%** compared to May-2022

### Peeled fresh cashew nuts

The average export in May-2023 is **5.212** USD/ton, **decrease 2.6%** compared to the previous month; and **decrease 7.2%** compared to the same month of 2022.

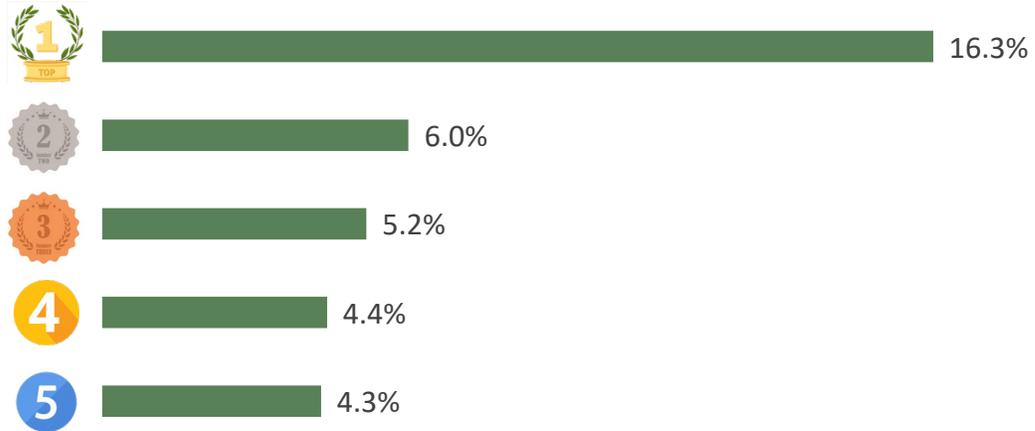
### Roasted cashew nuts

The average export in May-2023 is **7.829** USD/ton; **increase 35.9%** compared to the previous month, and **increase 3.8%** compared to the same month of 2022.

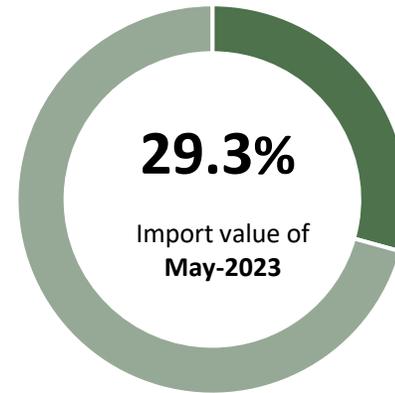


# CASHEW NUTS

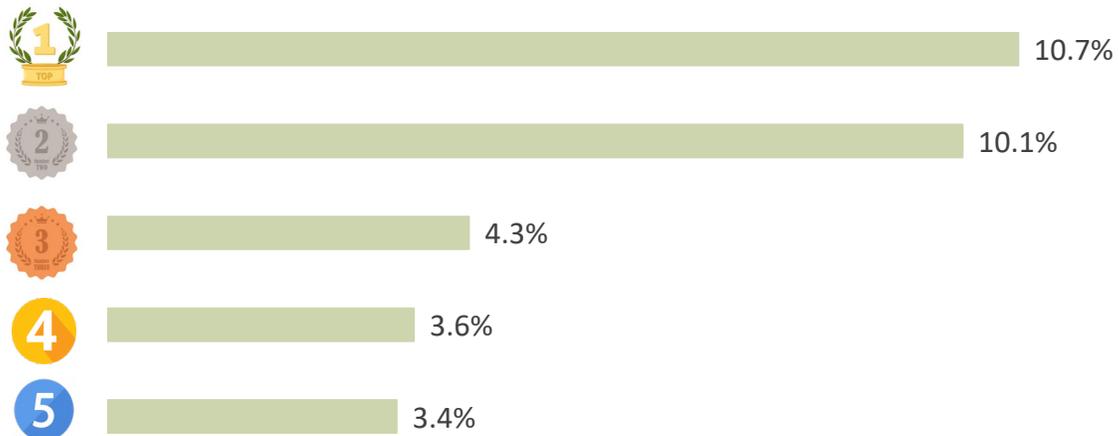
## TOP 5 export enterprises by value to the ASEAN, May 2023



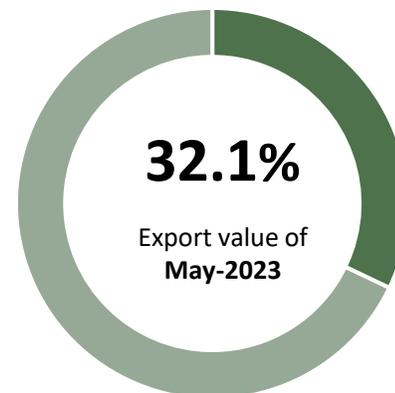
## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023



## TOP 5 export enterprises by volume to the ASEAN, May 2023



## Volume ratio of TOP 5 export enterprises to the ASEAN, May 2023



Source: Calculated from data of the General Department of Customs

# CASHEW NUTS

## SPOTLIGHT

01

In the first five months of 2023, cashew nuts were the largest import item from Cambodia to Vietnam, with a total value of 753 million USD. This import volume amounted to approximately 546,467 tons, accounting for 52% of the total import volume and 54% of the total import value between the two countries.

*Source: Vietnam cashew association(06/2023)*

02

Cambodia's national policy on the cashew industry for the period 2022-2027 is aimed at three main goals, including: increasing output and production capacity with competitive quality, promoting industrialisation, increasing value added from harvesting as well as increasing processing by-products of the treatment industry to 25% by 2027 and then to at least 50% by 2032; supporting exports through diversifying markets associated with connecting many fields in export activities. This policy aims to facilitate trade, reduce costs and enhance the strength of Cambodian cashew in the market.

This newly issued policy will support existing participants and attract more resources to invest in the production chain to develop the cashew industry to maintain the old market and expand to seek new markets. This will open up job opportunities and bring added value to the people, contribute to reducing poverty, limit the situation of going abroad to find work and boost the country's economic growth.

*Source: Bizlive Diginews (06/2023)*





# PEPPER

## Export value and volume to the ASEAN, May-2023



## Export results to the ASEAN, May-2023

**VALUE**  
**4.1** Mil. USD

↗ Increase **8.6%** compared to Apr-2023

↘ Decrease **11.3%** compared to May-2022

↗ **26.5 Thousand USD** more than the monthly average rate in 2022

Accumulated five months of 2023 reaches **20.05 Mil. USD, 41.6%** of total 2022

**VOLUME**  
**1.4** Thousand tons

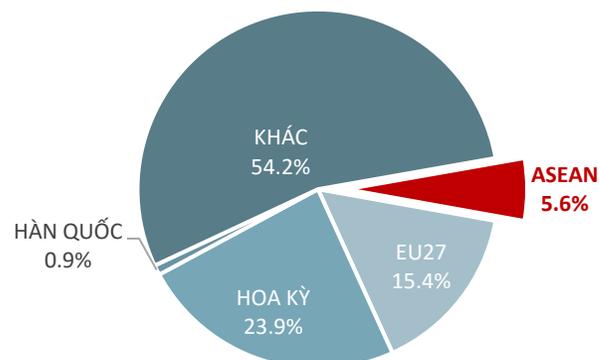
↗ Increase **8.3%** compared to Apr-2023

↗ Increase **1.9%** compared to May-2022

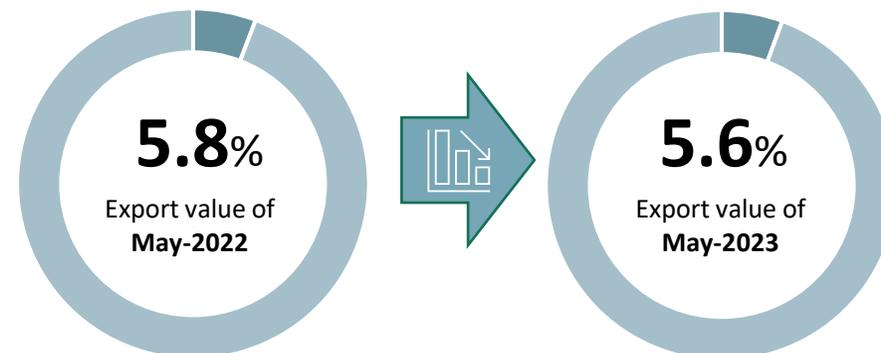
↗ **164 ton** more than the monthly average rate in 2022

Accumulated five months of 2023 reaches **7.1 Thousand tons, 48%** of total 2022

## Percentage of export value to the ASEAN, May-2023



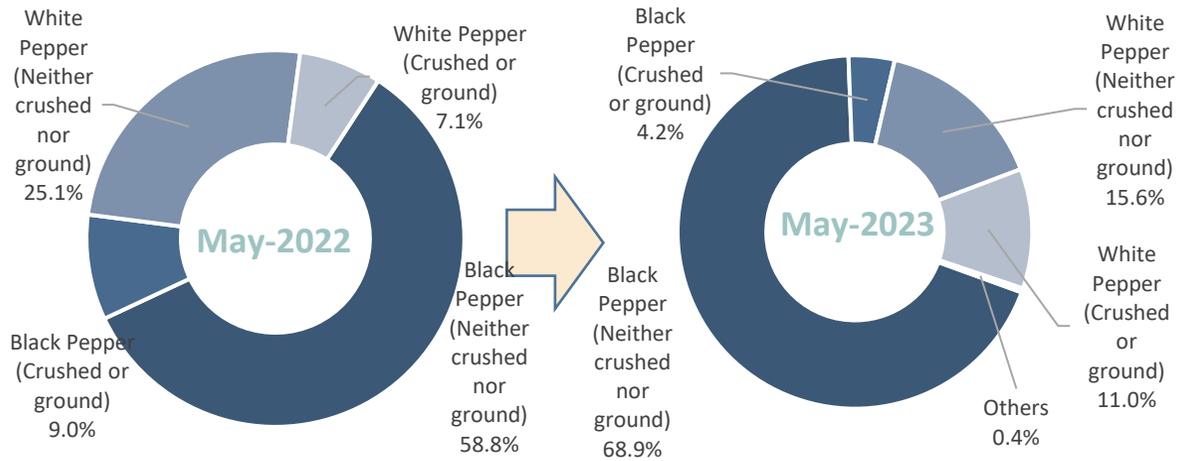
## Changes in the percentage of export value to the ASEAN, May-2023





# PEPPER

## Structure of export by-product to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### Black Pepper (Neither crushed nor ground)

Value: **3.5** Mil. USD

Increase **32.8%** compared to Apr-2023

Increase **4.1%** compared to May-2022



### White Pepper (Neither crushed nor ground)

Value: **0.8** Mil. USD

Decrease **27.5%** compared to Apr-2023

Increase **44.6%** compared to May-2022



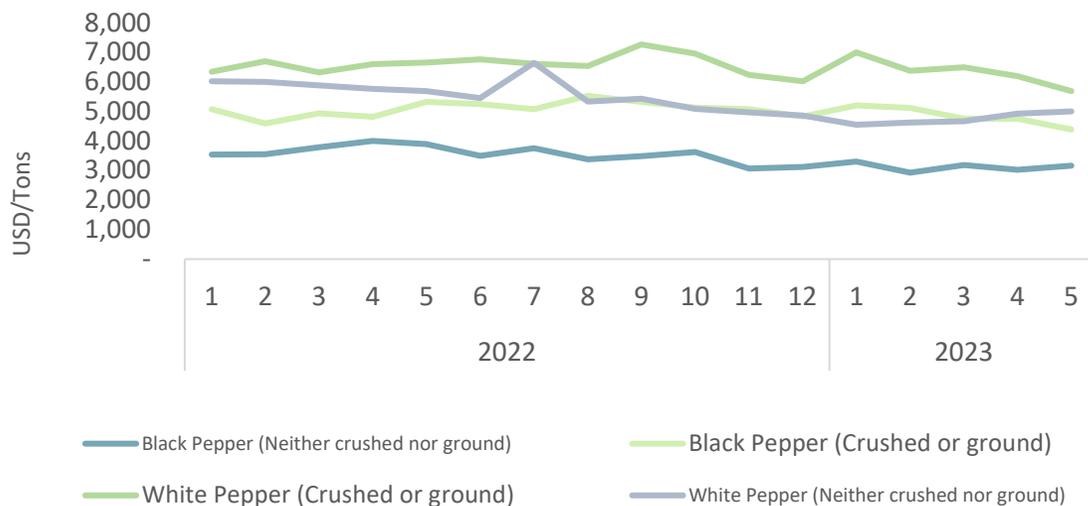
### White Pepper (Crushed or ground)

Value: **0.6** Mil. USD

Increase **23.7%** compared to Apr-2023

Increase **38.2%** compared to May-2022

## Average export price to the ASEAN- May 2023



### Black Pepper (Neither crushed nor ground)

The average export in May-2023 is **3.161** USD/ton; **increase 5%** compared to the previous month. but **decrease 9%** compared to the same month of 2022.

### White Pepper (Neither crushed nor ground)

The average export in May-2023 is **4.996** USD/ton, **increase 1%** compared to the previous month; but **decrease 12%** compared to the same month of 2022.

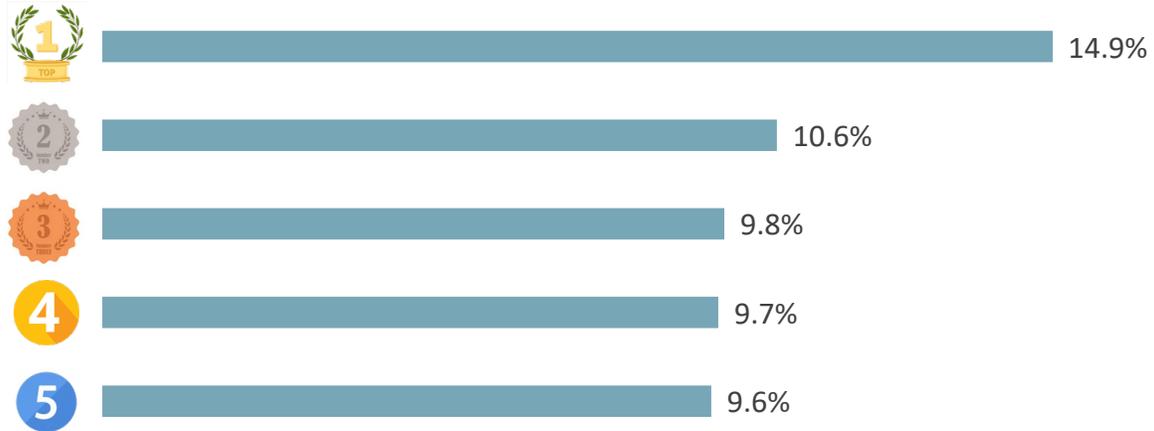
### White Pepper (Crushed or ground)

The average export in May-2023 is **5.691** USD/ton, **decrease 8%** compared to the previous month; and **decrease 15%** compared to the same month of 2022.

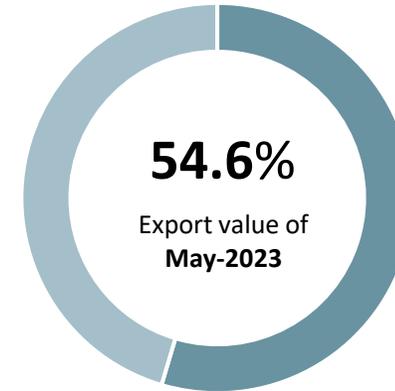


# PEPPER

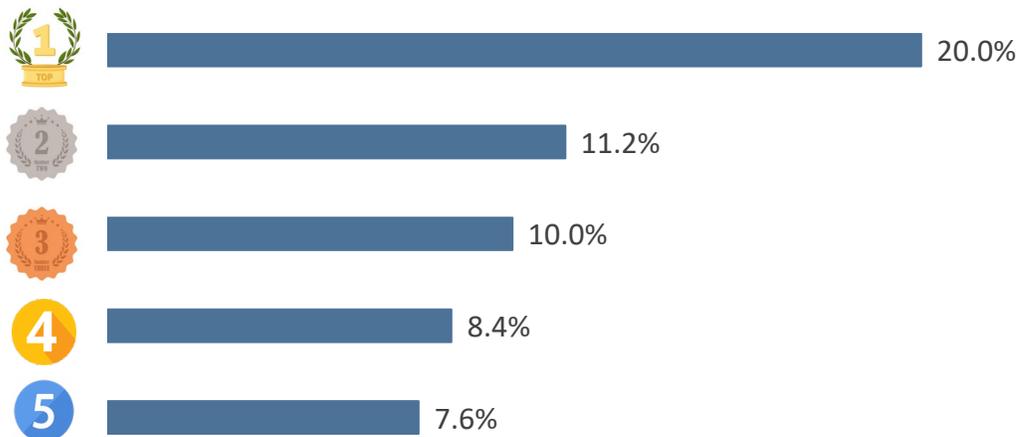
## TOP 5 export enterprises by value to the ASEAN, May 2023



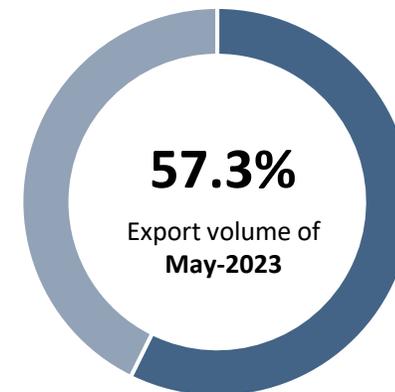
## Value ratio TOP 5 export enterprise to the ASEAN, May 2023



## TOP 5 enterprise by volume to the ASEAN, May 2023



## Volume ratio TOP 5 enterprise to the ASEAN, May 2023



# PEPPER

## SPOTLIGHT



01

The international pepper community (IPC) has chosen the theme "Balance of global pepper supply and demand - Alleviating pressure on prices" for the 51st annual meeting and conference in Malaysia, scheduled to be held in November—2023. According to IPC, the world pepper market is less affected by financial and monetary issues than other commodity markets; instead, the main impact on prices comes from the supply and demand of the market.

*Source: Vietnam pepper association(06/2023)*

02

Currently, Indonesia is considered to be in the period of decreasing pepper prices. It is estimated that the size of the 2023 crop will be about 55,000 tons, 10,000 tons less than the 2022 crop (65,000 tons). It is expected that Indonesia will harvest pepper in July-August. The reason is that Indonesian people are not interested in pepper in the context of competition with coffee when coffee prices are better.

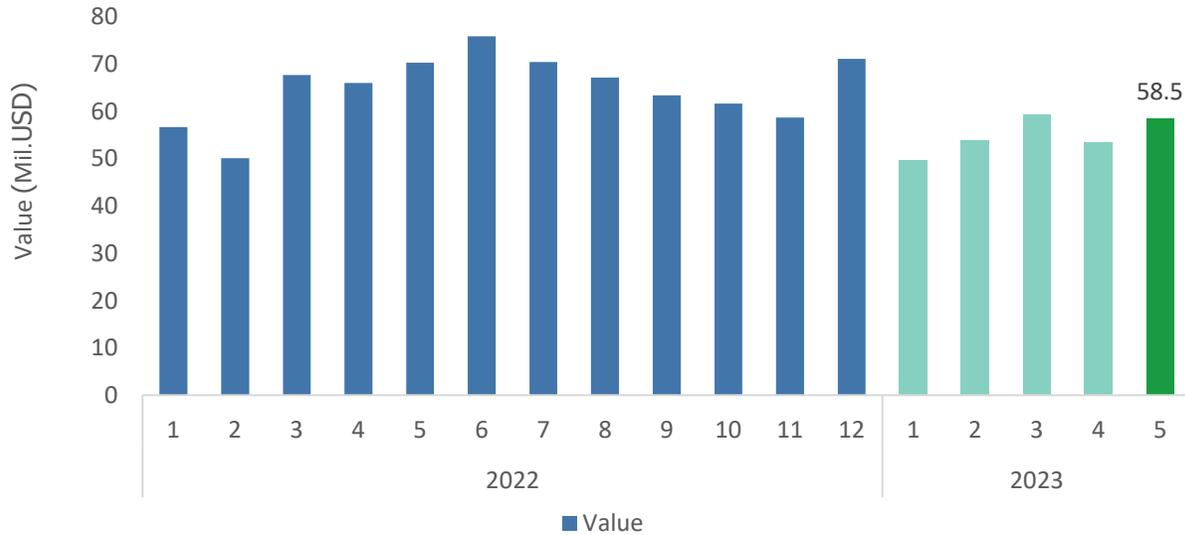
*Source: Vietnam pepper association(06/2023)*





# SEAFOOD

## Export value to the ASEAN, May-2023



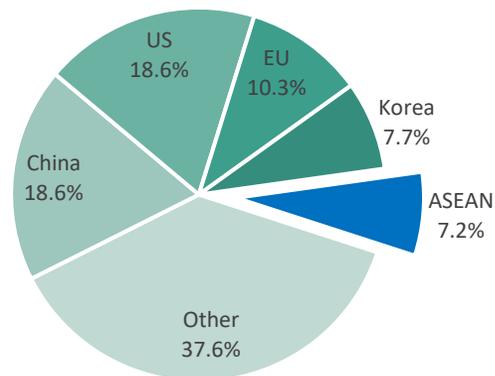
## Export results to the ASEAN, May-2023

**Value**

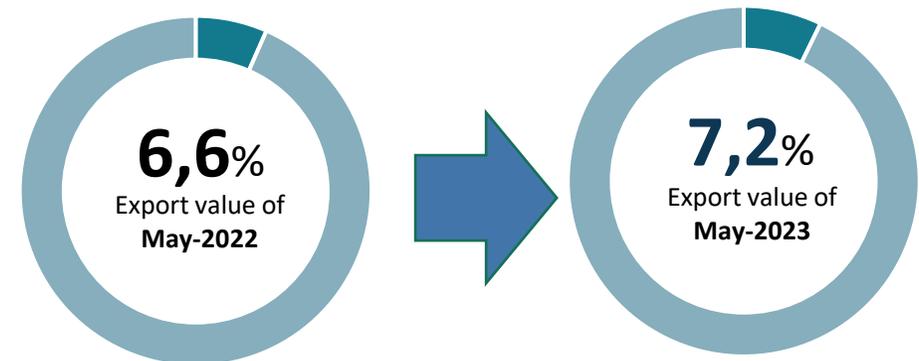
**58,5**  
Mil. USD

- ↗ Increase **9.2%** compared to Apr-2023
- ↘ Decrease **16.8%** compared to May-2022
- ↘ **6.5 Mil. USD** less than the monthly average rate in 2022
- ◇ Accumulated five months of 2023 reaches **275.2 Mil. USD**, **35.3%** of total 2022

## Percentage of export value to the ASEAN, May-2023



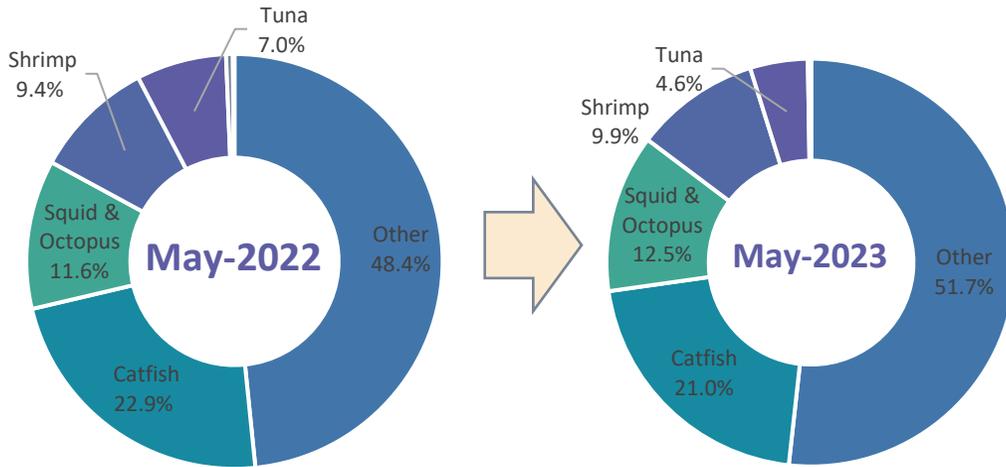
## Change in percentage of export to the ASEAN, May-2023



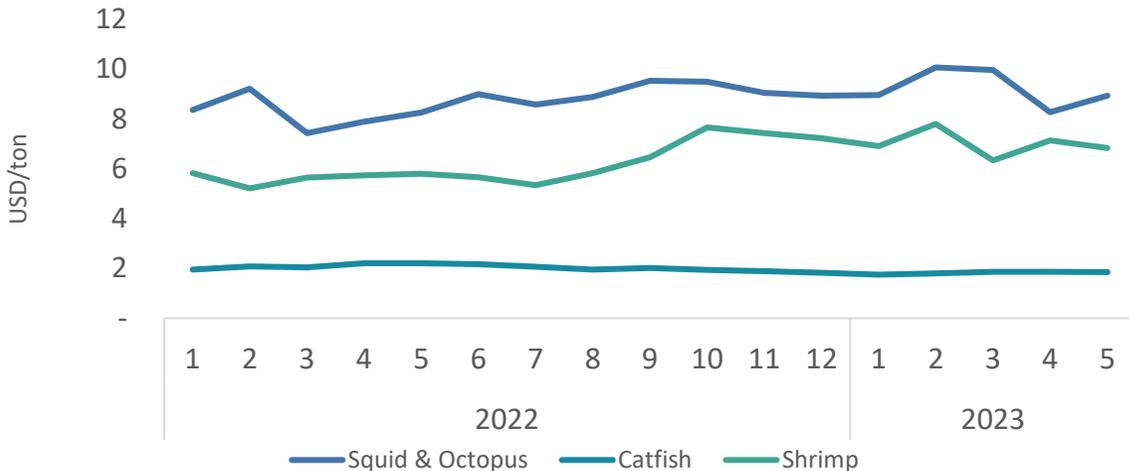


# SEAFOOD

## Structure of export by product to the ASEAN, May-2023



## Average export price to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### Catfish

Value: **12.2** Mil. USD

Increase **10.3%** compared to Apr-2023

Decrease **23.4%** compared to May-2022



### Squid and Octopus

Value: **7.3** Mil. USD

Increase **54.8%** compared to Apr-2023

Decrease **9.9%** compared to May-2022



### Shrimp

Value: **5.8** Mil. USD

Increase **21.4%** compared to Apr-2023

Decrease **12.2%** compared to May-2022

### Squid and Octopus

The average export in May-2023 is **8.9** USD/kg; **increase 8.0%** compared to the previous month; and **increase 8.1%** compared to the same month of 2022.

### Catfish

The average export in May-2023 is **1.8** USD/kg; **decrease 0.8%** compared to the previous month; and **decrease 16.6%** compared to the same month of 2022.

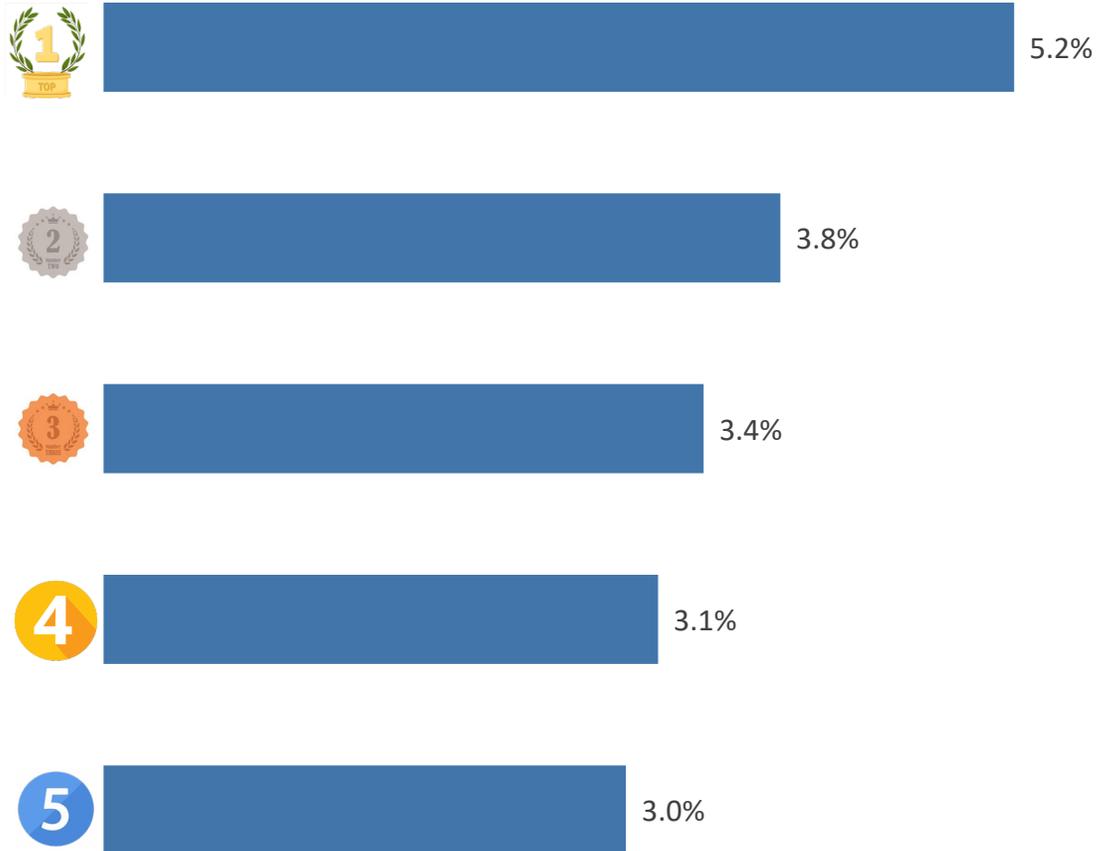
### Shrimp

The average export in May-2023 is **6.8** USD/kg; **decrease 4.2%** compared to the previous month; but **increase 17.8%** compared to the same month of 2022.

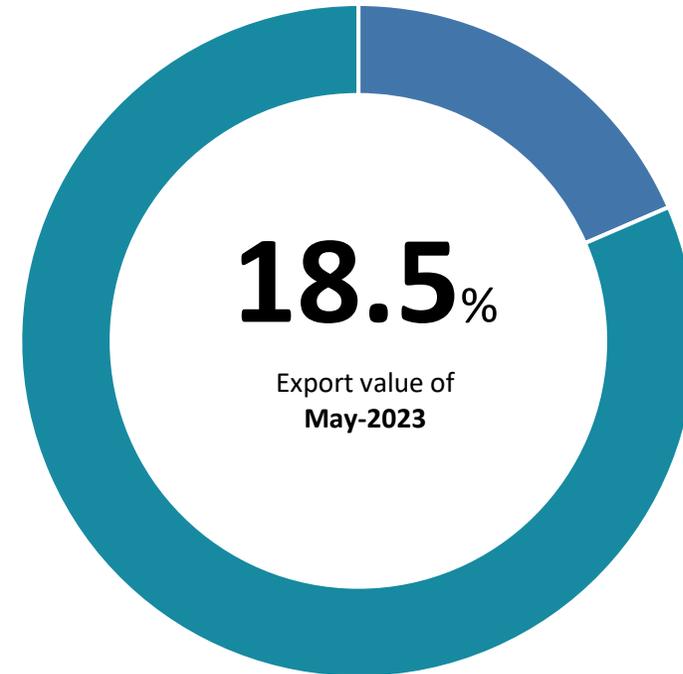


# SEAFOOD

## TOP 5 export enterprises by value to the ASEAN, May-2023



## Value ratio of TOP 5 export enterprises to the ASEAN, May-2023



01

### Thai Union cuts labor costs, focuses on VAP products

Thai Union Group has experienced a decrease in shrimp sales during the first four months of the year, with declines in key export markets such as the US, Korea, Japan, and Europe. Shrimp sales are expected to reduce by 10% this year, even if demand is expected to increase again this summer. Faced with this situation, the group has tried to decrease the number of workers by investing more in automatic processing machines and implementing a “factory of the future” project since the pandemic. The group also focuses on more complex Value Added Products (VAPs) to create a competitive advantage, such as coconut-coated shrimp or cream cheese filling. About 50% of Thai Union's shrimp are sold as VAP, but this volume is also expected to increase this number to more than 70%.

*Source: Undercurrentnews (6/2023)*

02

### Indonesian shrimp technology company Jala expands to Vietnam

Jala Tech, an Indonesian shrimp technology company, and the third-largest shrimp producer globally, is expanding into Vietnam to provide farming management software and IoT (Internet of Things) products. Jala will work closely with local farmers and businesses to help increase productivity while minimizing the environmental impact of shrimp farming.

*Source: Vasep(6/2023)*





# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to the ASEAN, May-2023



## Export results to the ASEAN, May-2023



### VALUE

↓ Decrease **11.2%** compared to Apr-2023

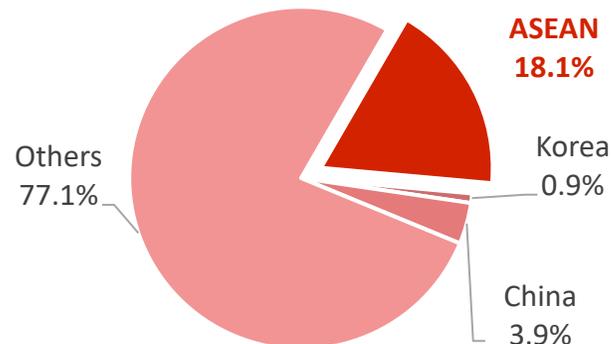
↗ Increase **33.2%** compared to May-2022

↑ **641** thousand USD more than the monthly average rate in 2022

◇ Accumulated five months of 2023 reaches **11.4 Mil. USD, 49.7%** of the total 2022

**2,5**  
Mil. USD

## Percentage of export value to the ASEAN, May-2023



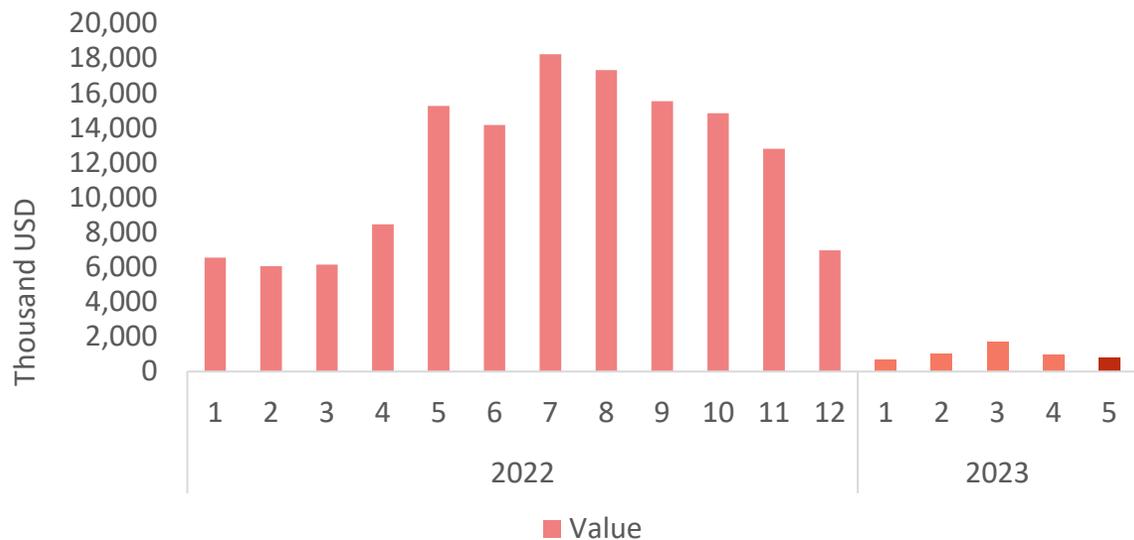
## Changes in percentage of export value to the ASEAN, May-2023





# MEAT & MEAT PRODUCTS (EXPORT)

## Import value from the ASEAN, May-2023



## Import results from the ASEAN, May-2023

### VALUE



**831**

Thousand USD

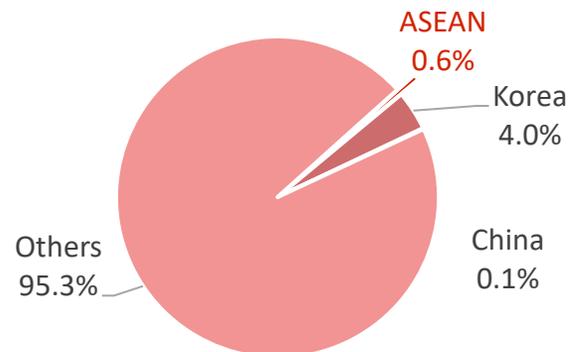
↘ Decrease **12.6%** compared to Apr-2023

↘ Decrease **94.6%** compared to May-2022

↓ **11** Mil. USD less than the monthly average rate in 2022

Accumulated 5 months of 2023 reaches **5.2** Mil. USD, **3.6%** of total 2022

## Percentage of import from the ASEAN, May-2023



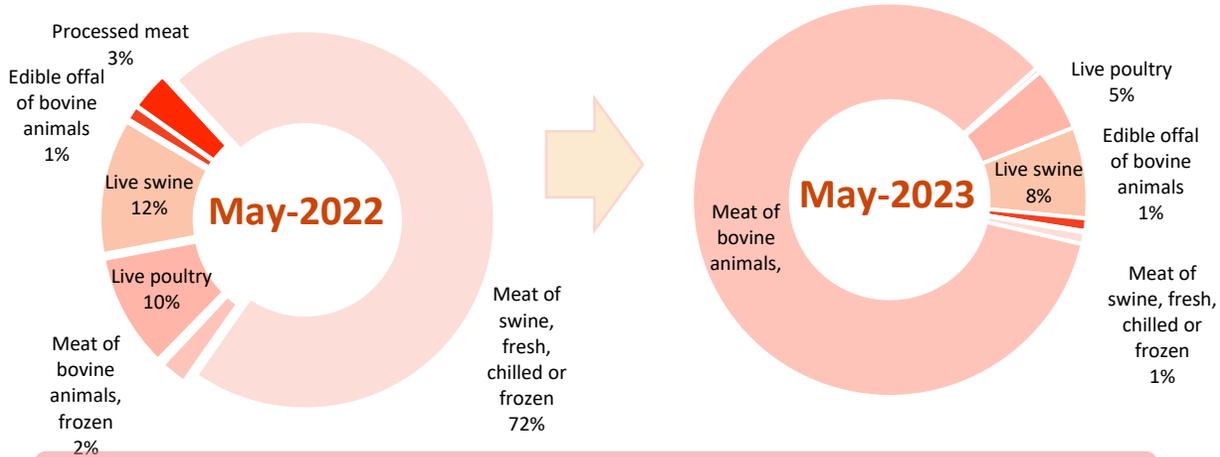
## Changes in the percentage of import value from the ASEAN, May-2023



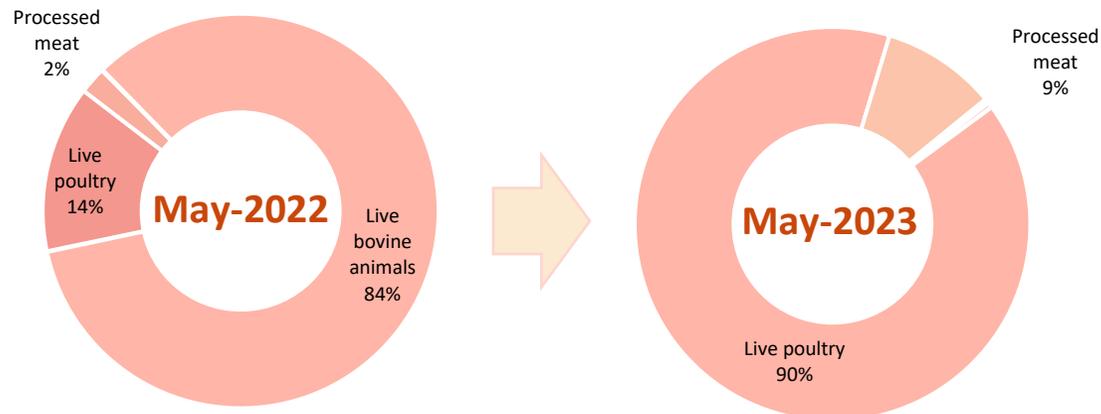


# MEAT & MEAT PRODUCTS (EXPORT)

## Structure of export value by-products to the ASEAN, May-2023



## Structure of import value by products the ASEAN, May-2023



## Import results to the ASEAN, May-2023



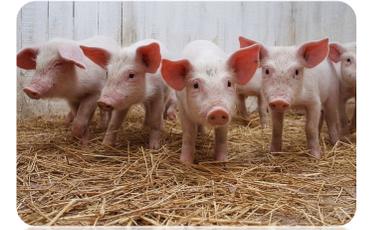
### Live bovine animals

Value: **2.2** Mil. USD  
Decrease **2.3%** compared to Apr-2023



### Live poultry

Value: **134** thousand USD  
Decrease **14.3%** compared to Apr-2023  
Decrease **28.1%** compared to May-2022



### Live swine

Value: **190** thousand USD  
Increase **138%** compared to Apr-2023  
Decrease **13.6%** compared to May-2022

## Export results the ASEAN, May-2023



### Live poultry

Value: **746** thousand USD  
Decrease **6.9%** compared to Apr-2023  
Decrease **64.34%** compared to May-2022



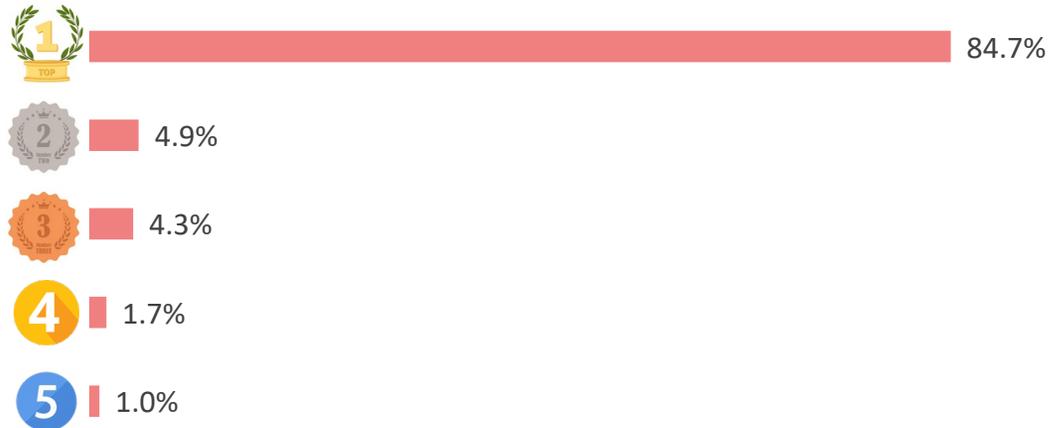
### Processed meat

Value: **130** thousand USD  
Decrease **39.9%** compared to Apr-2023  
Decrease **76.86%** compared to May-2022

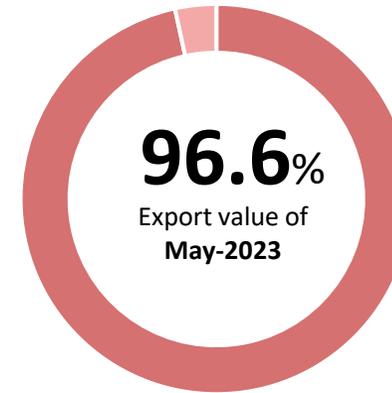


# MEAT & MEAT PRODUCTS (EXPORT)

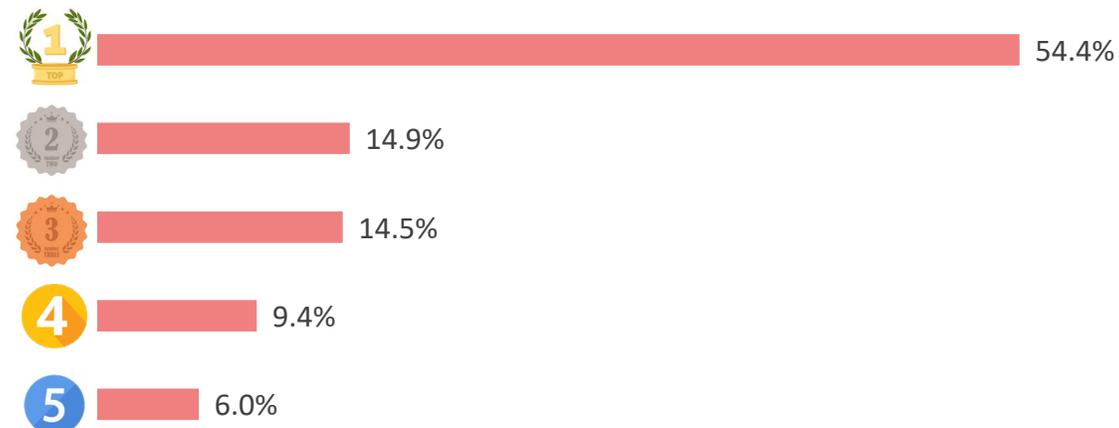
## TOP 5 export enterprises by value to the ASEAN, May 2023



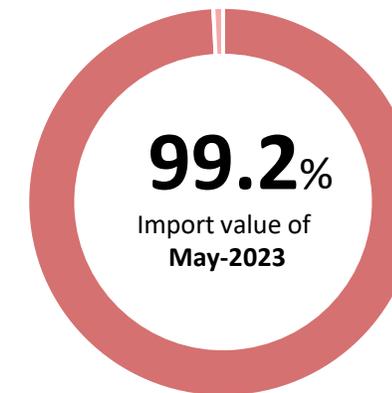
## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023



## TOP 5 import enterprises by value to the ASEAN, May 2023



## Value ratio of TOP 5 import enterprises to the ASEAN, May 2023





# MEAT & MEAT PRODUCTS

## SPORLIGHT



01

Indonesia's large population and the challenges faced by its livestock industry present significant growth opportunities for the U.S. beef and pork industry. The presence of animal health concerns, such as foot-and-mouth disease and cellulite, has led to a decline in domestic beef production in Indonesia. Additionally, the supply of imported beef from countries like Brazil and India may not meet the growing demand for high-quality beef in the country.

*Source: Lowaagribusinessradionetwork (6/2023)*

02

Thailand Customs allowed the Livestock Development Department to destroy 4,300 tons of smuggled pork. This meat was discovered in 159 out of 161 unclaimed containers at Laem Chabang port. This country's customs said that all the above shipments had no origin, no certificate of slaughter or certificate of food hygiene and safety, etc.

*Source: Asian-agribiz (6/2023)*



# COMMENTS AND REVIEW

## RICE

The potential for rice export is still significant due to global climate change and the economic restructuring of many countries towards a sharp decrease in agriculture and narrowing of the area of food crops (especially ASEAN countries such as Indonesia, Philippines, and Malaysia...). Accordingly, Vietnam's rice exports to ASEAN countries in the coming months will continue to be high compared to last year.



## SEAFOOD

Seafood exports to the ASEAN market are showing signs of recovery. Summer tourism is developing, leading to an increase in seafood consumption demand. Tourism is increasing enormously in the Thai market, and the economic stimulus after the election is expected to boost domestic consumption, creating opportunities for seafood exporters to enter this market.



## COFFEE

Coffee export prices will continue to increase next month due to limited supply from major coffee-producing countries in the ASEAN region (Vietnam and Indonesia). Besides the product demand, the demand for Robusta coffee remains high.

It is forecasted that the amount of coffee exported next month will continue to decrease due to limited coffee inventories (estimated at only 80,000 tons).





Any comments, please send to:

**INFORMATION CENTER FOR AGRICULTURE AND RURAL DEVELOPMENT**  
INSTITUTE OF POLICY AND STRATEGY FOR AGRICULTURE AND RURAL DEVELOPMENT

Address: *16 Thuy Khue Street, Thuy Khue Wd., Tay Ho Dist., Hanoi*

Email: [thongtinhitruong@ipsard.gov.vn](mailto:thongtinhitruong@ipsard.gov.vn); [info@agro.gov.vn](mailto:info@agro.gov.vn)

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

