

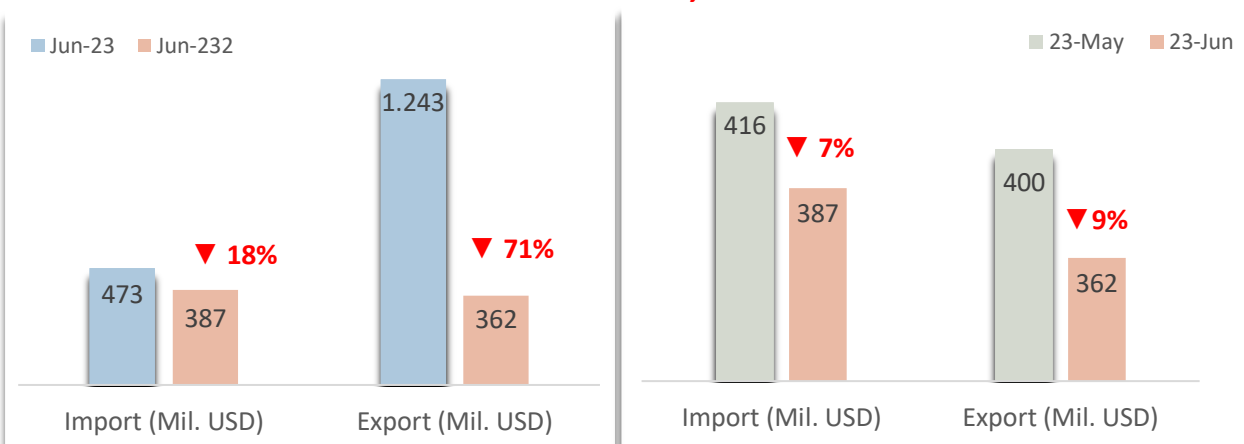
# MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **ASEAN MARKET**

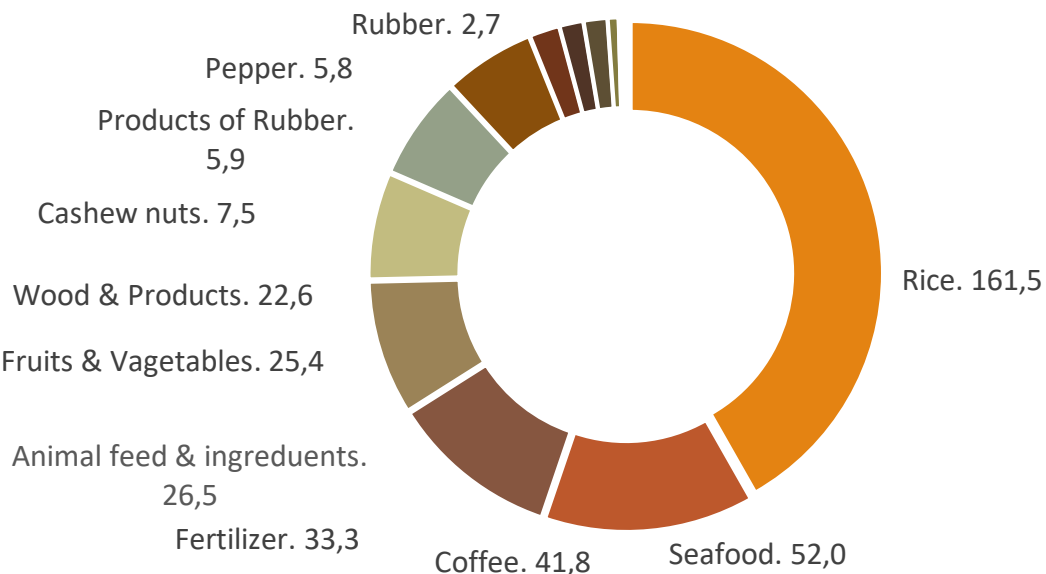


# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN JUNE 2023

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

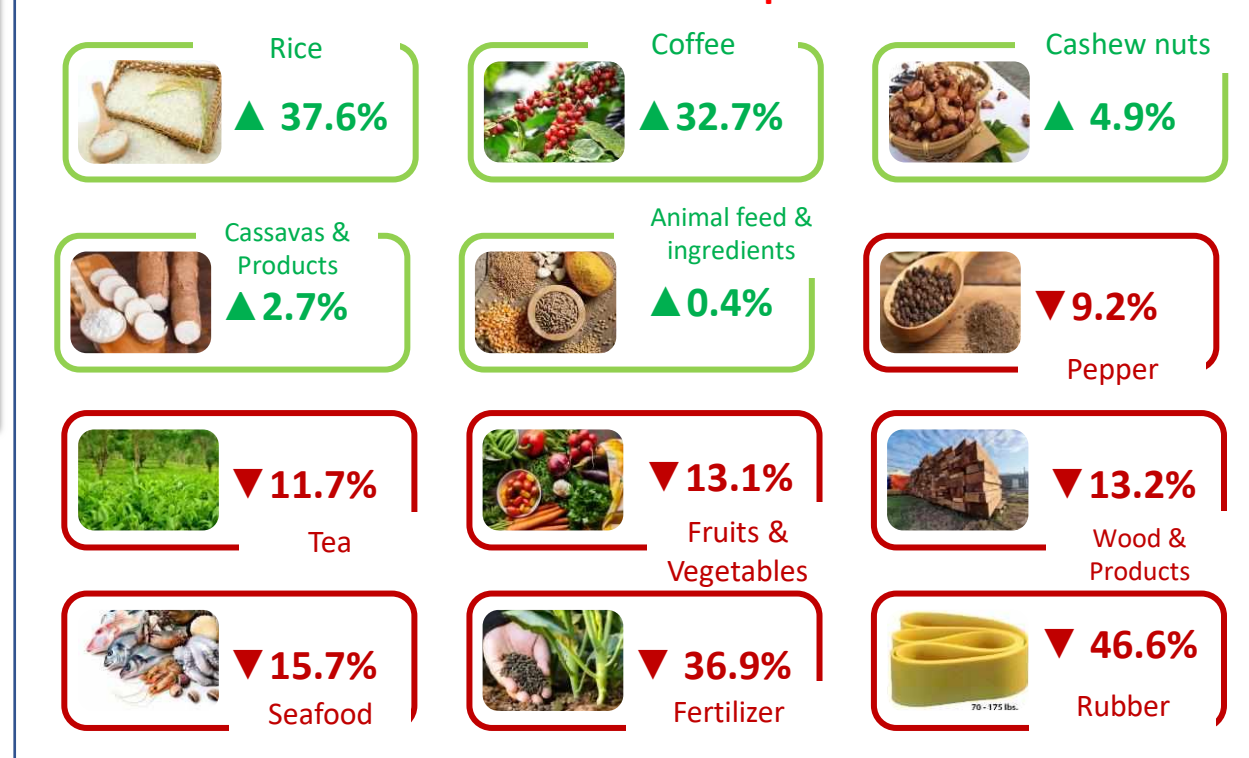


## AFF key product export value to the ASEAN, Jun-2023

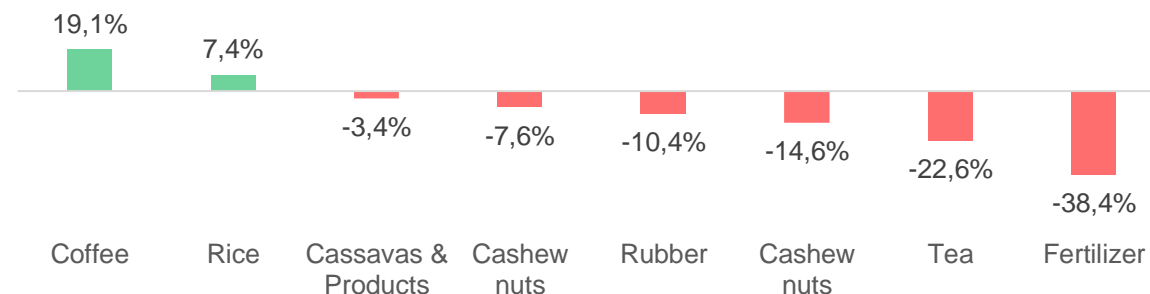


Unit: Mil. USD

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



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



Source: Calculated from data of the General Department of Customs

# SPOTLIGHTS

## Thailand confidently responds to the global food crisis



**Thailand confidently responds to the global food crisis**

Thailand is ready to face the global food security crisis. The country has established systems through the National Food Council (NFC), the body responsible for directing the nation's food policy. Thailand has also created conditions for production for domestic consumption as well as export. From January to March 2023, Thailand's export turnover of agricultural products and natural rubber to other Association of Southeast Asian Nations (ASEAN) member countries reached THB 148.736 billion (USD 4.3 billion), increased by 4.18% over the same period.



The Thai Ministry of Agriculture and Cooperatives is taking steps to improve food security by creating a comprehensive database. In addition, OAE is developing a specific crop calendar for each province. This calendar will help estimate the quantity and type of agricultural products available each month, supporting food security management during normal times as well as during times of crisis.

*Source: aecvcci.vn*

## ASEAN, China reach economic cooperation agreements worth 1.7 billion USD



**ASEAN, China reach economic cooperation agreements worth 1.7 billion USD**

On July 30, the Association of Southeast Asian Nations (ASEAN) and the Guangdong-Hong Kong-Macau Greater Bay Area of China signed 7 economic cooperation agreements, worth a total of 12.1 billion yuan (about 1.7 billion USD), related to industrial park construction projects, digital economy and agricultural cooperation. China and ASEAN are currently each other's largest trading partners. In the first 5 months of this year, trade turnover between the two sides

reached 2,600 billion CNY (about 364 billion USD), up 9.9% over the same period last year. Ambassador Hau Diem Ky said that 2023 is the year of bilateral agricultural development and food security cooperation, while other areas of cooperation such as communication, sustainable development, and tourism,... also develop strongly.

*Source : asean.org*





# RICE

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



## Export results to the ASEAN, Jun-2023

**VALE**  
**165.2** Mil. USD

↘ Decrease **9.3%** compared to May-2023

↗ Increase **8.7%** compared to Jun-2022

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

◇ Accumulated six months of 2023 reaches **1.3 Mil. USD, 76.0%** of the total 2022

**VOLUME**  
**322.8** Thousand tons

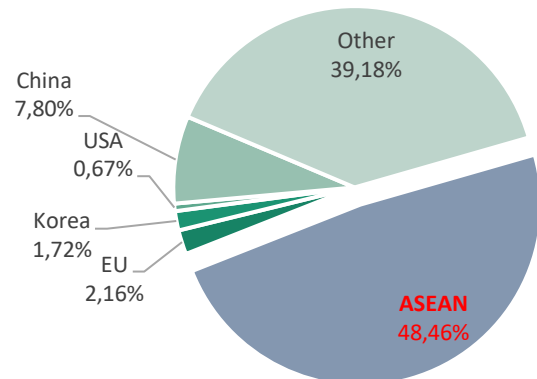
↘ Decrease **9.3%** compared to Jun 2023

↗ Increase **2.7%** compared to Jun-2022

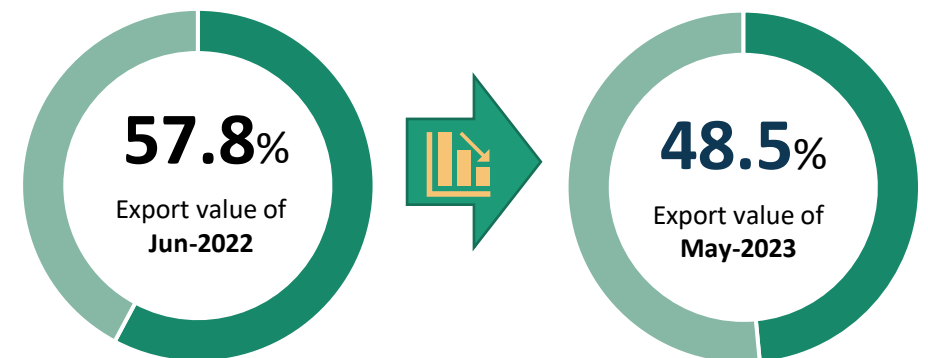
↗ **30.6 thousand tons** more than the monthly average rate in 2022

◇ Accumulated six months of 2023 reaches **2.5 Mil.ton, 71.6%** total 2022

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



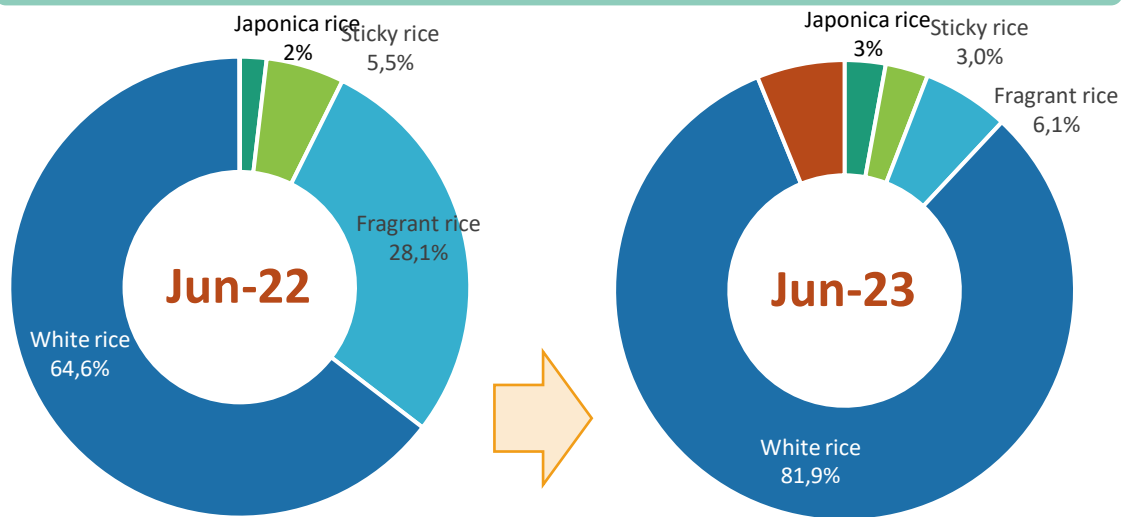
## Changes in the percentage of export value to the ASEAN, Jun-2023





# RICE

## Structure of exports by products to the ASEAN



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



### White Rice

Value: **135.2** Mil. USD  
 Decrease **8%** compared to May-2023  
 Increase **2%** compared to Jun-2022



### Fragrant rice

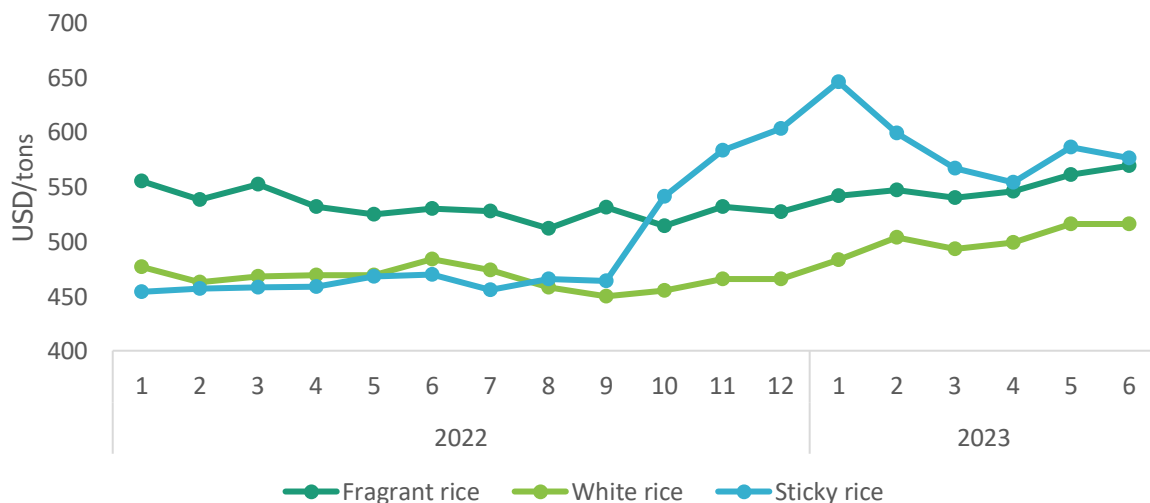
Value: **10.0** Mil. USD  
 Decrease **48%** compared to May-2023  
 Decrease **83%** compared to Jun-2022



### Sticky rice

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

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



### Sticky rice

The average export in Jun-2023 is **576** USD/tons; **Decrease 2%** compared to the previous month; and **Increase 23%** compared to the same month of 2022.

### Fragrant rice

The average export in Jun-2023 is **569** USD/tons; **Increase 1%** compared to the previous month; and **Increase 7%** compared to the same month of 2022.

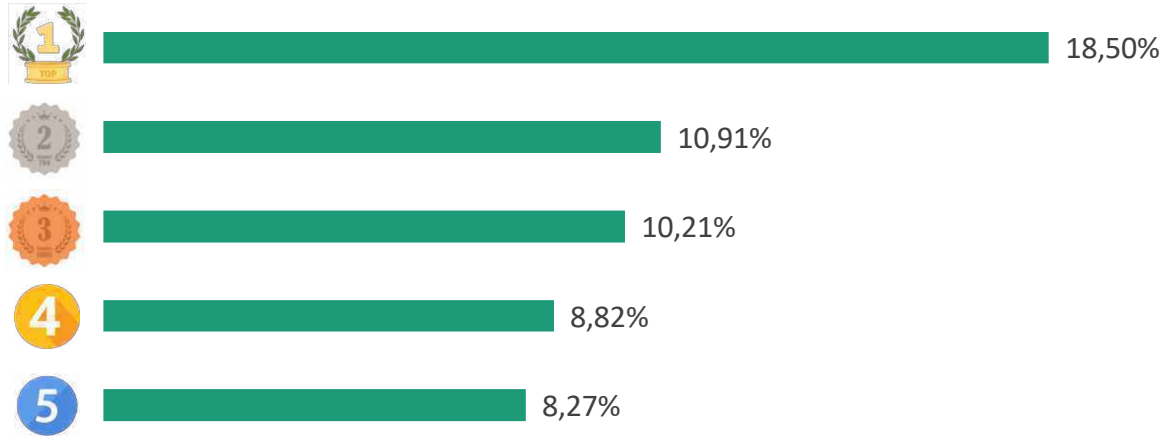
### White Rice

The average export in Jun-2023 is **516** USD/tons; **unchanged** compared to the previous month; and **Increase 6%** compared to the same month of 2022.

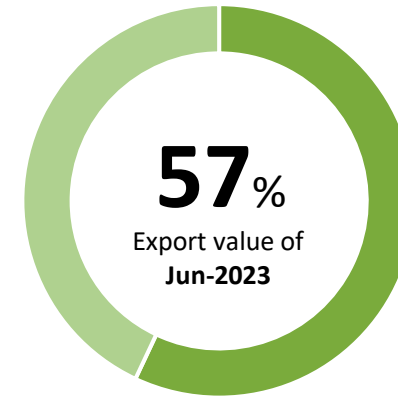


# RICE

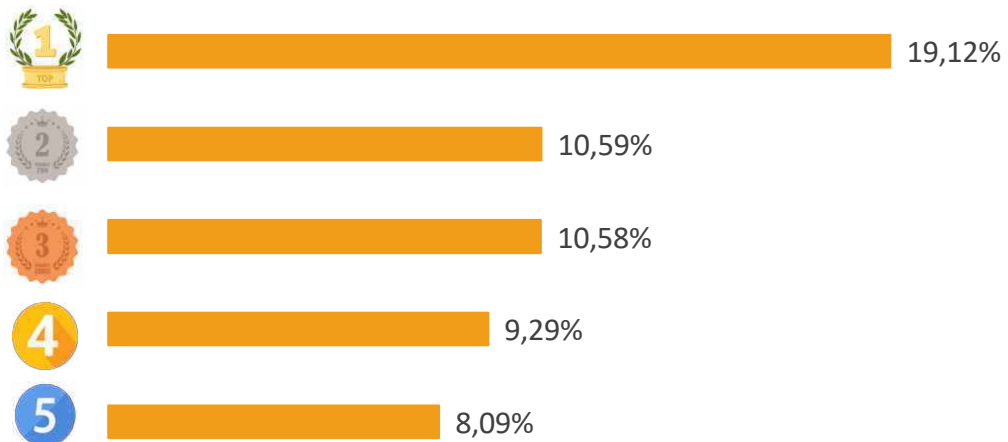
## TOP 5 export enterprises by value to the ASEAN, Jun-2023



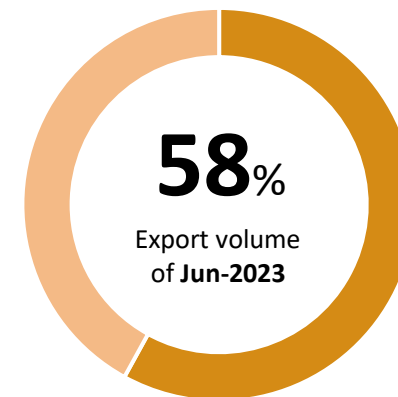
## Value ratio of TOP 5 export enterprises to the ASEAN, Jun-2023



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



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





# RICE

## SPOTLIGHTS

01

According to the Thai Rice Exporters Association, the country is likely to export 9 million tons of rice this year due to increased import demand from the world market amid concerns about the negative impact of El Nino, in the next six months. In the last months of 2023, Thailand can export 4-5 million tons of rice after exporting 4.1 million tons in the first 6 months of the year.

*Source : Bangkokpost.com*

02

According to the Philippine Department of Crop Production, the country imported 1.81 million tons of rice in the first six months of 2023, down 6.43% year-on-year. In June 2023 alone, rice imports fell by 56.13% to 187.5 thousand tons. In the first 6 months of the year, Vietnam continued to be the largest rice supplier to the Philippines with 1.61 million tons, accounting for 89.09%.

*Source : Bworldonline.com*

03

According to the Cambodian Rice Association, the country's milled rice exports in the first half of 2023 are estimated to reach 329,633 tons worth 229.23 million USD, equal to 47.09% of the export plan of 700,000 tons in 2023. Currently, rice of Cambodia is exported to 52 countries and territories through 50 export enterprises. In terms of export categories, fragrant rice accounted for 85.08%, long grain white rice 11.34%, parboiled rice 2.42%, organic rice 1.02% and short grain white rice 0.14%.

*Source : Phnompenhpost.com*





# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, Jun-2023



## Export results to the ASEAN, Jun-2023

### VOLUME

**26.9**

Mil. USD

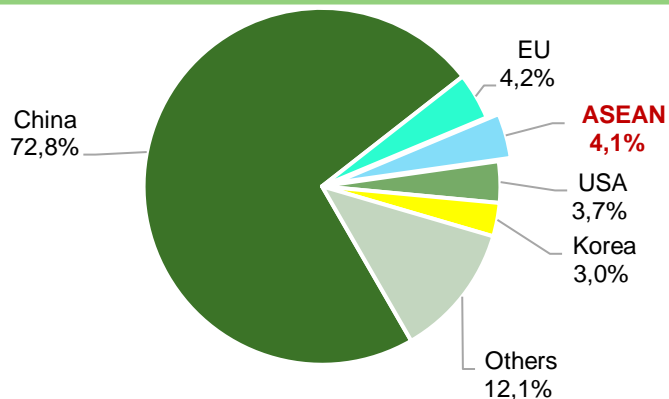
Increase **41.2%** compared to May-2023

Decrease **26.5%** compared to Jun-2022

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

Accumulated six months of 2023 reaches **134.5 Mil. USD**; **38.7%** of the total 2022

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



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

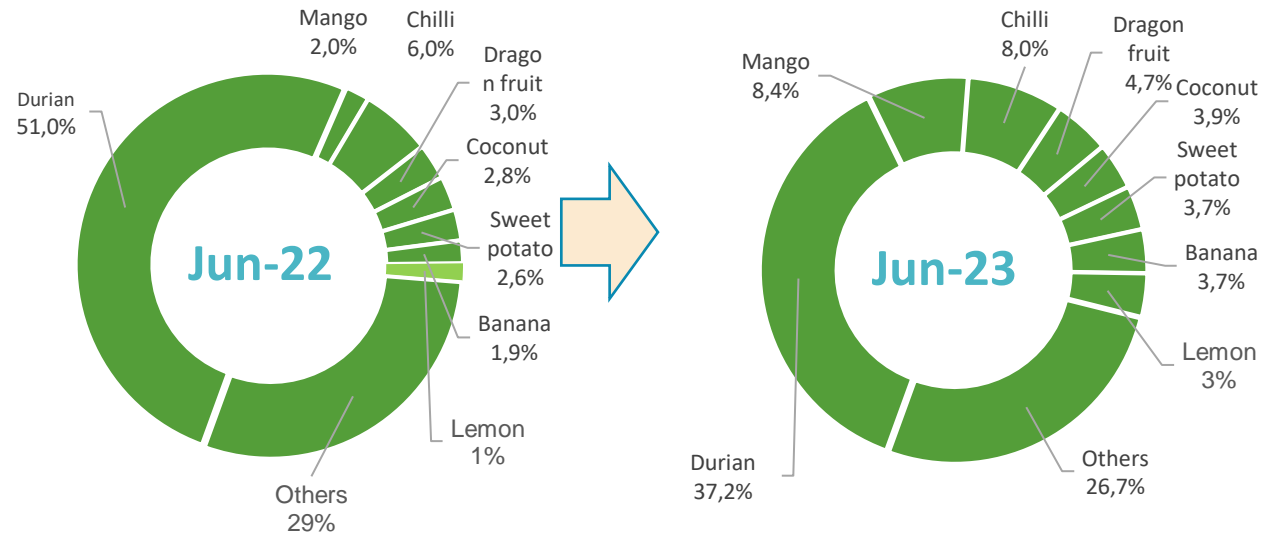






# FRUITS AND VEGETABLES (EXPORT)

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



## Export results to the ASEAN, Jun-2023



### Durian

Value: **10.0** Mil. USD

Increase **418.0%** compared to May-2023

Decrease **46.3%** compared to Jun-2022



### Pomelo

Value: **2.3** Mil. USD

Increase **7.8%** compared to May-2023  
Increase **211.2%** compared to Jun-2022



### Chilli

Value: **2.2** Mil. USD

Increase **5.2%** compared to May-2023

Decrease **1.0%** compared to Jun-2022



### Dragon fruit

Value: **1.3** Mil. USD

Increase **6.8%** compared to May-2023

Increase **15.4%** compared to Jun-2022



### Coconut

Value: **1.1** Mil. USD

Decrease **40.9%** compared to May-2023  
Increase **1.4%** compared to Jun-2022



### Sweet potato

Value: **0.99** Mil. USD

Decrease **19.1%** compared to May-2023

Increase **4.5%** compared to Jun-2022



### Banana

Value: **0.98** Mil. USD

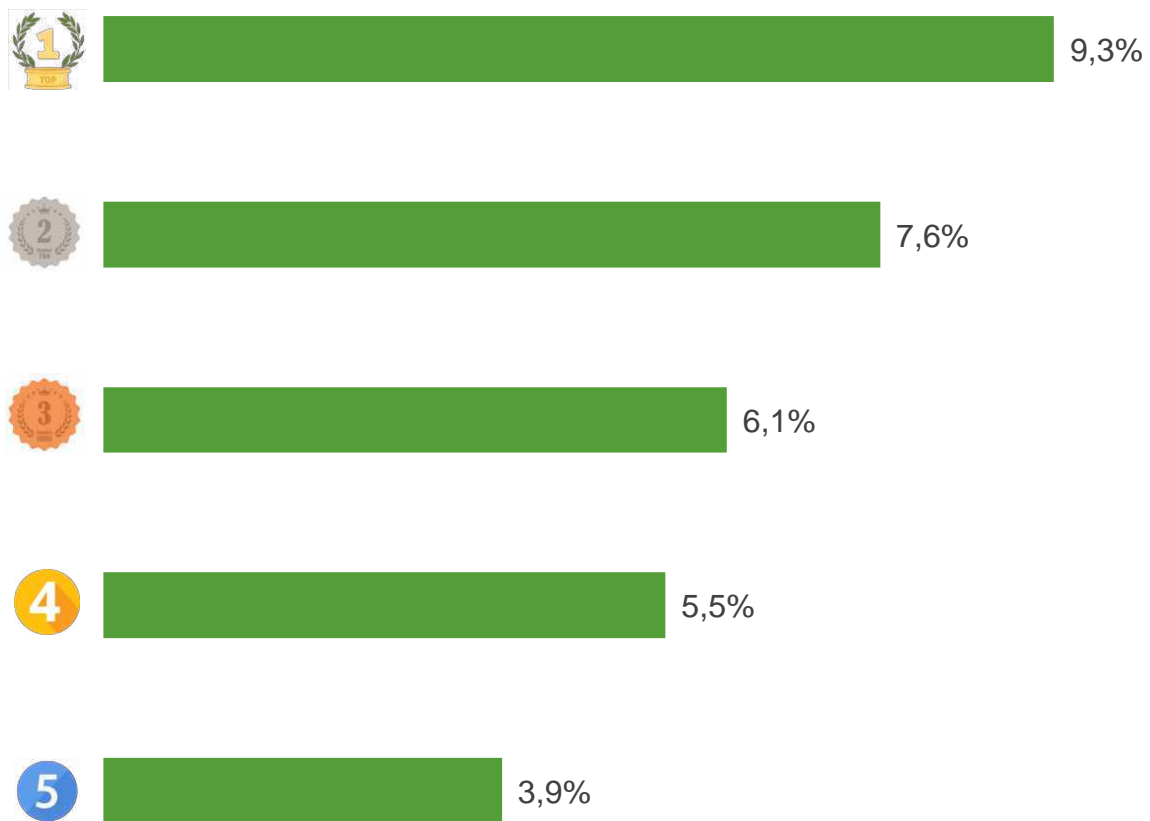
Decrease **3.2%** compared to May-2023

Increase **85.5%** compared to Jun-2022

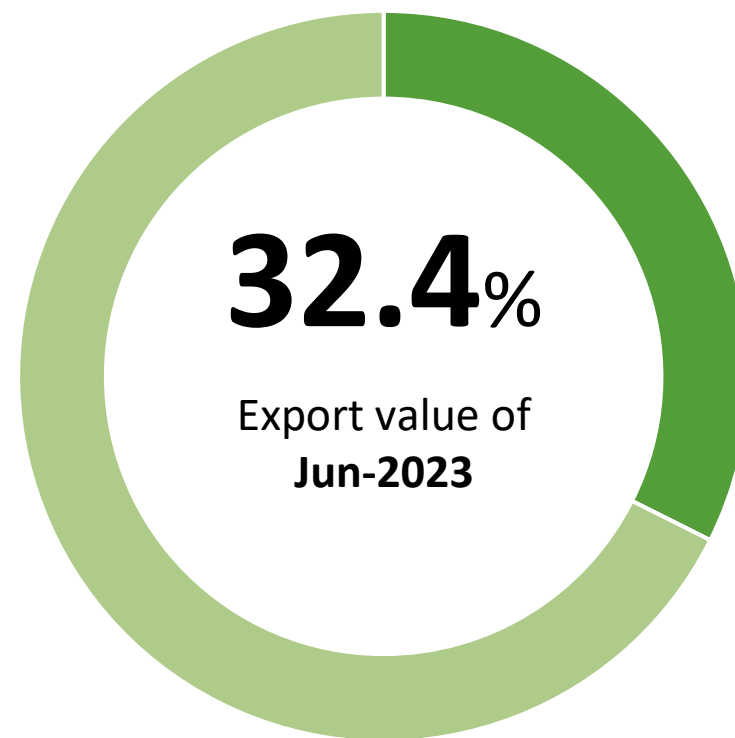


# FRUITS AND VEGETABLES (EXPORT)

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



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





# FRUITS AND VEGETABLES (IMPORT)

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



## Import results from the ASEAN, Jun-2023

### VALUE



# 16.9

Mil USD

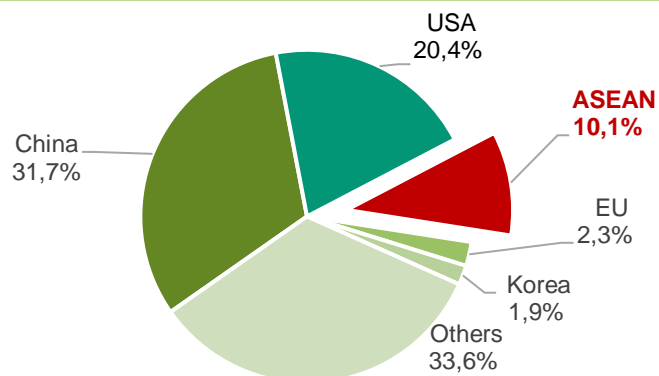
Decrease **5.5%** compared to May 2023

Decrease **30.7%** compared to Jun-2022

**5.4 mil.USD** less than the monthly average rate in 2022

Accumulated six months of 2023 reaches **116.8 Mil.USD**; **43.7%** of the total 2022

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

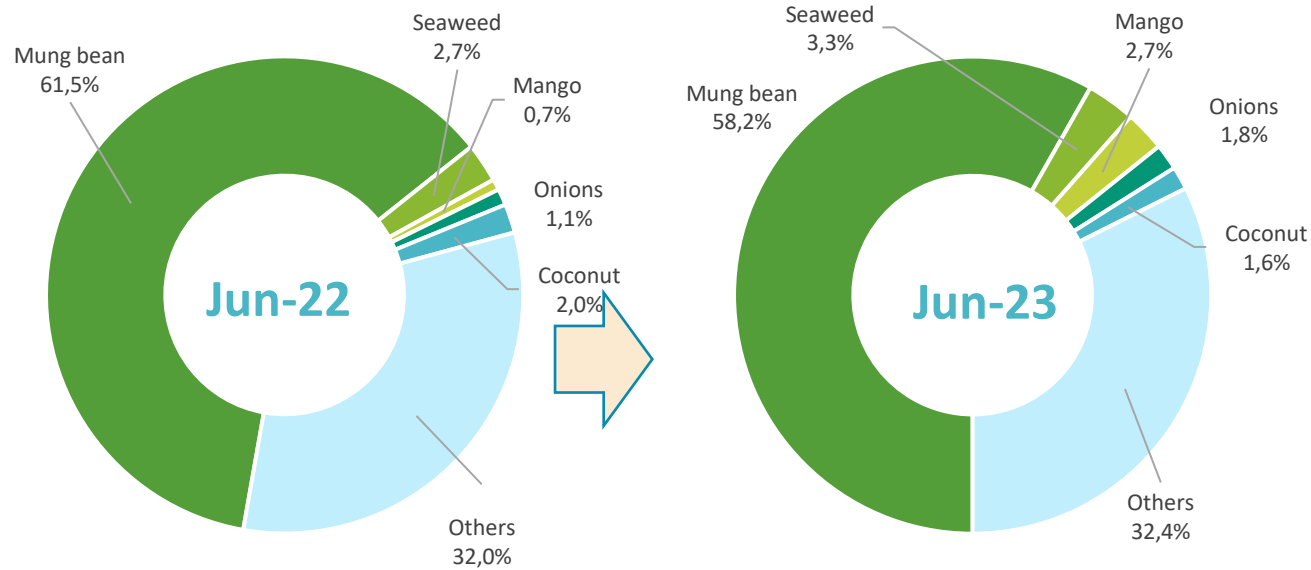


## Changes in percentage of import value from the ASEAN, Jun-2023



# FRUITS AND VEGETABLES (IMPORT)

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



### Mango

Value: **0.46** Mil. USD

Decrease **84.9%** compared to May-2023

Increase **156.3%** compared to Jun-2022



### Onions

Value: **0.3** Mil. USD

Decrease **21.2%** compared to May-2023

Increase **10.9%** compared to Jun-2022

## Import results form the ASEAN, May-2023



### Mung bean

Value: **9.8** Mil. USD

Increase **17.4%** compared to May-2023

Decrease **34.4%** compared to Jun-2022



### Seaweed

Value: **0.56** Mil. USD

Decrease **7.2%** compared to May-2023

Decrease **13.6%** compared to Jun-2022



### Coconut

Value: **0.27** Mil. USD

Decrease **11.4%** compared to May-2023

Decrease **44.2%** compared to Jun-2022

01

The Malaysian Pineapple Industry Board (MPIB) will introduce a new pineapple variety in August to boost Malaysia's annual output. There are currently 16 pineapple varieties grown in Malaysia but only 4 varieties (MD2, N36, Morris and Josephine) are exported to foreign markets. Malaysia aims to achieve pineapple production of 700,000 tons by 2025.

*Source : Freshplaza.com*

02

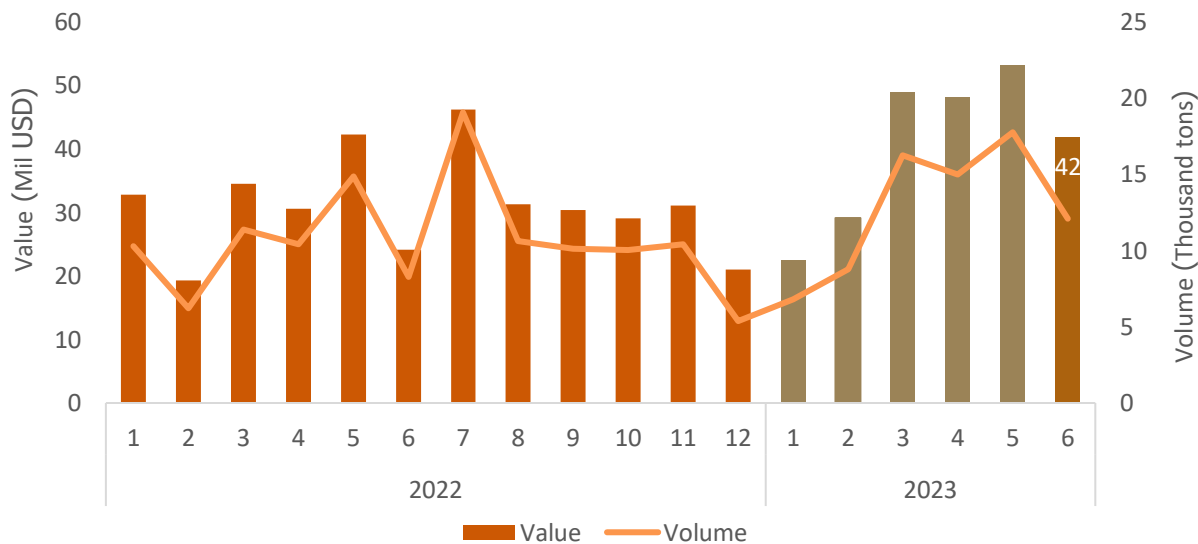
According to China.com, durian production in Southern Thailand in 2023 will reach about 670,000 tons and 45% of the production has been marketed. According to the Department of Agricultural Sciences of Thailand, from January 1 to May 25, 2023, Thailand exported 28,755 lots of fresh durian to China, with a total volume of 477,741.80 tons, equivalent to equivalent to 62.39 billion baht (\$1.8 billion), a 30-year record.

*Source : Guojiguoshu.com*



# CÀ PHÊ

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



## Export results to the ASEAN, Jun-2023

**41.8** Mil. USD

▼ Decrease **21.3%** compared to May-2023

↑ Increase **73.4%** compared to Jun-2022

↑ **10.8** Mil. USD more than the monthly average rate in 2022

◇ Accumulated six months of 2023 reaches **243.6** Mil. USD; **65.4%** of the total 2022

**12.1** Thousand tons

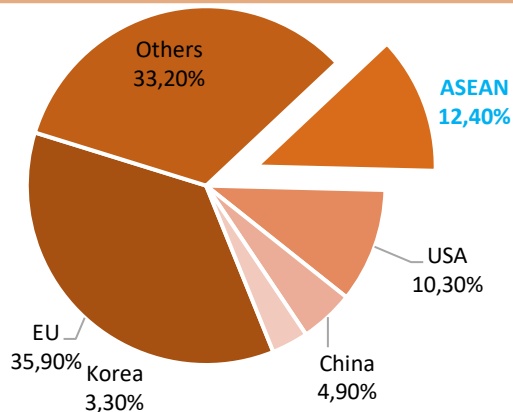
▼ Decrease **31.9%** compared to May-2023

↑ Increase **45.6%** compared to Jun-2022

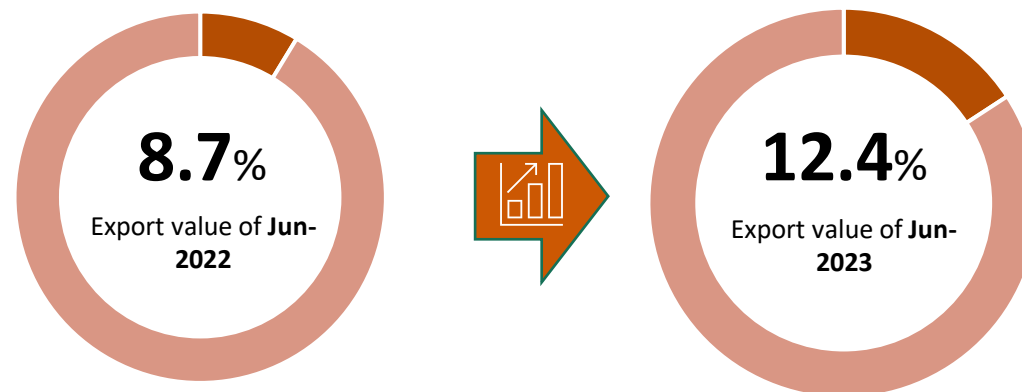
↑ **1.5** thousand tons more than the monthly average rate in 2022

◇ Accumulated six months of 2023 reaches **76.7** Thousand tons; **60.4%** of the total 2022

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

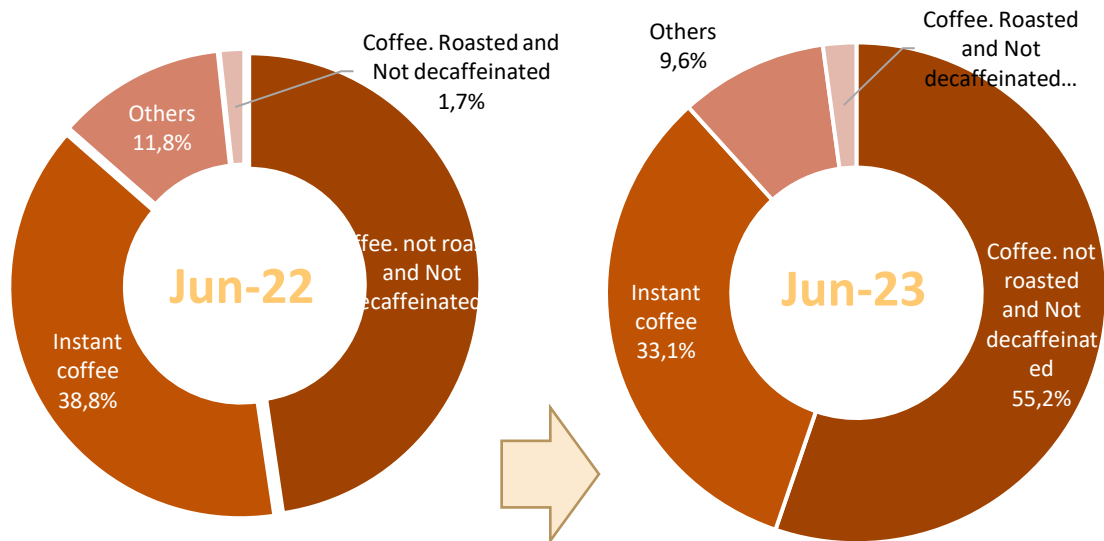


## Changes in percentage of export value to the ASEAN, Jun-2023

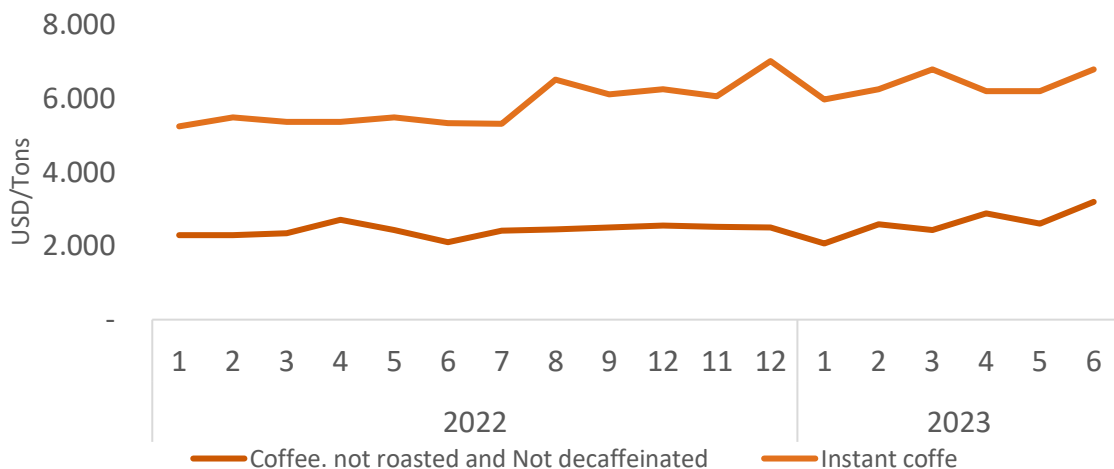


# COFFEE

## Structure of exports by products to the ASEAN



## Average export price to the ASEAN, Jun 2023



## Export results to the ASEAN. May-2023



### Coffee. not roasted and Not decaffeinated

Value: **23.1** Mil. USD  
 Decrease **30.2%** compared to May-2023  
 Increase **102%** compared to Jun-2022



### Instant coffee

Value: **13.8** Mil. USD  
 Decrease **1.8%** compared to May-2023  
 Increase **48.4%** compared to Jun-2022



### Coffee. Roasted and Not decaffeinated

Value: **0.9** Mil. USD  
 Increase **11.4%** compared to May-2023  
 Increase **114%** compared to Jun-2022

### Instant coffee

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

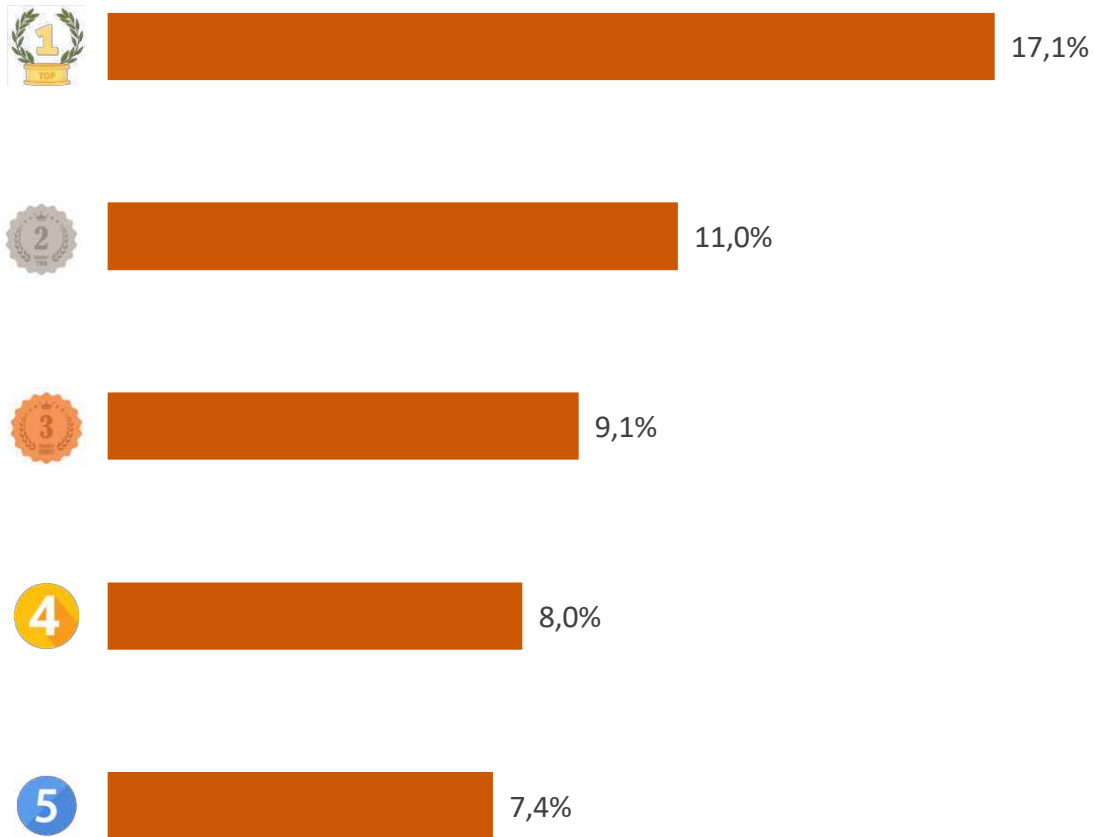
### Coffee. not roasted and Not decaffeinated

The average export in Jun-2023 is **2.613** USD/tons; Decrease **9.5%** compared to the previous month; but Increase **7%** compared to the same month of 2022.

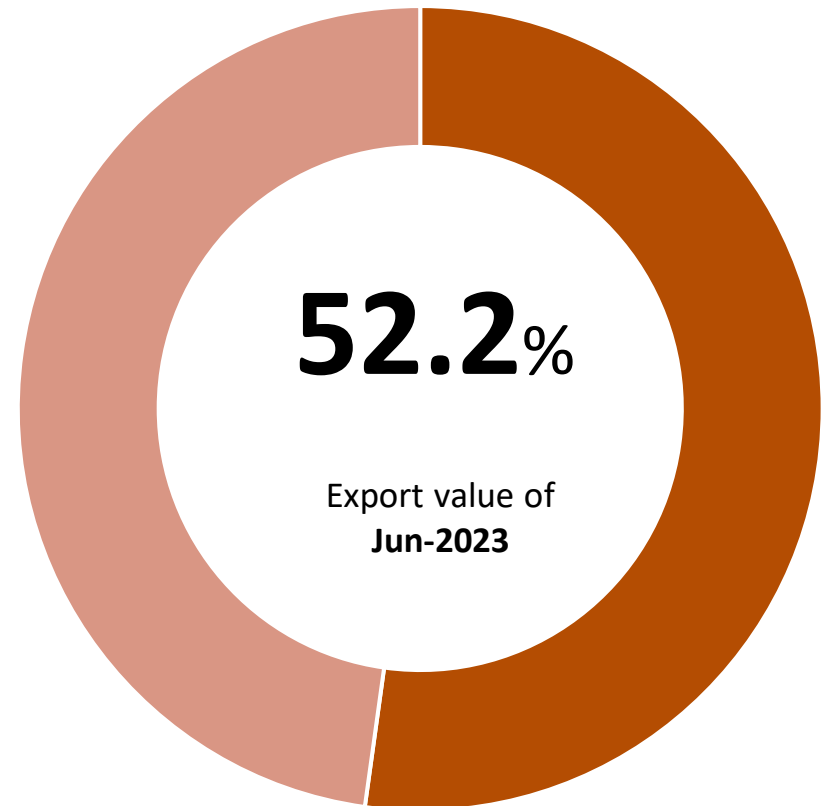


# COFFEE

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



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







## SPOTLIGHTS

### **INDONESIAN COFFEE PRODUCTION DECREASES 20% IN 2023**

The Indonesian Coffee Producers and Exporters Association (AEKI) expects that the country's coffee output will decrease by up to 20% in 2023, to 9.6 million bags due to rainy weather in the areas. main cultivation. Indonesia is currently the third-largest producer of Robusta coffee in the world.

In addition, the El Nino weather phenomenon, which is expected to develop globally in the second half of this year, also poses a greater risk to Robusta coffee than Arabica coffee.

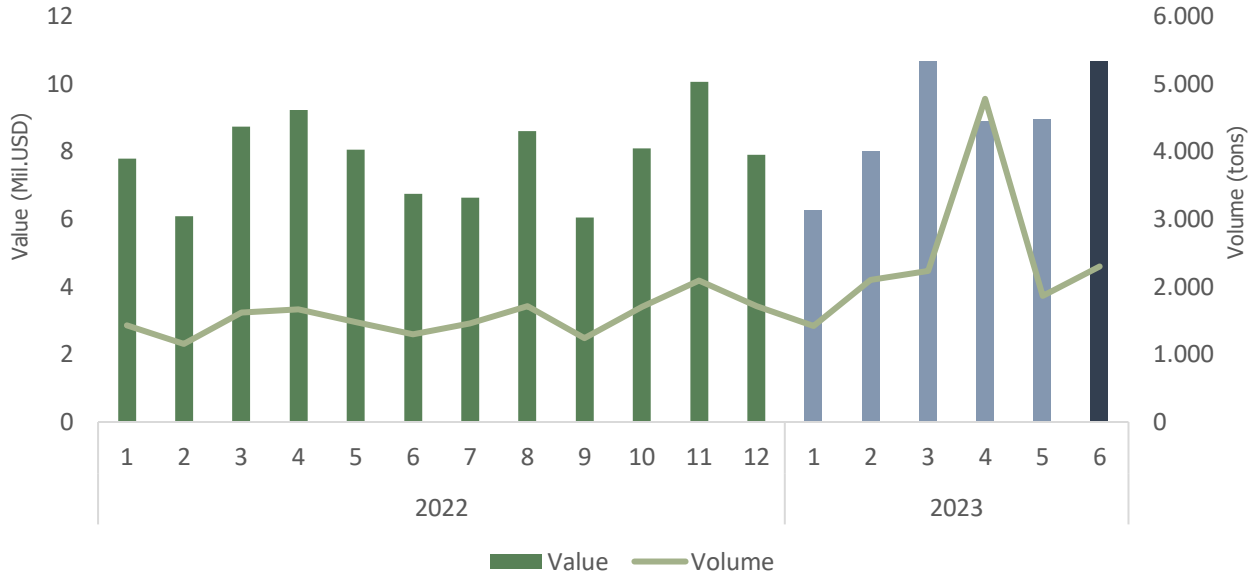
Source: Industry and Trade Magazine(7/2023)





# CASHEW NUTS

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



## Export results to the ASEAN, Jun-2023

**VALUE**  
**10.7** Mil. USD

↗ Increase **19.3%** compared to May-2023

↗ Increase **58%** compared to Jun-2022

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

Accumulated six months of 2023 reaches 53.5 Mil.USD; **57%** of the total 2022

**VOLUME**  
**2.3** Thousand tons

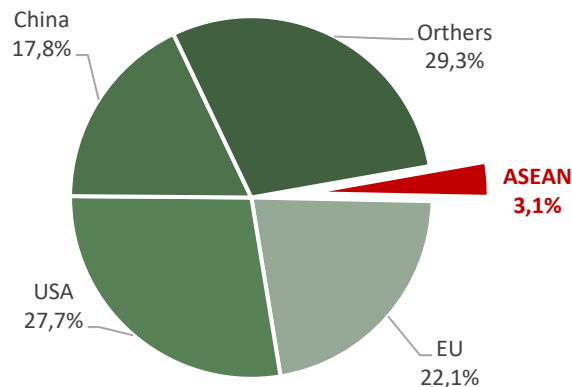
↗ Increase **23.3%** compared to May-2023

↗ Increase **78%** compared to Jun-2022

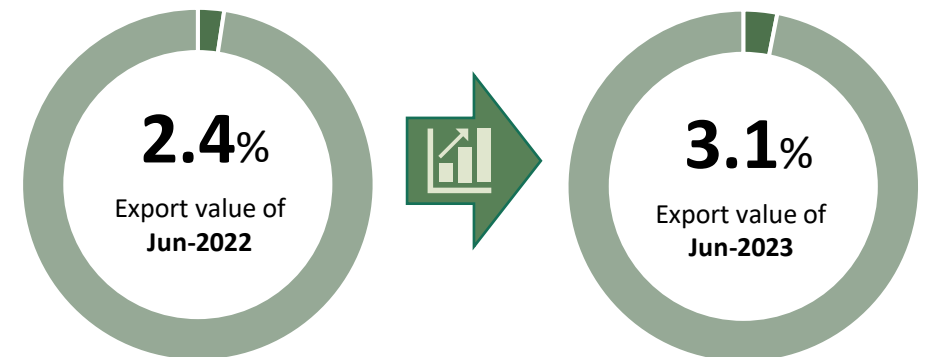
↗ **753 USD** more than the monthly average rate in 2022

Accumulated six months of 2023 reaches 14.7 thousand tons; **79%** of the total 2022

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



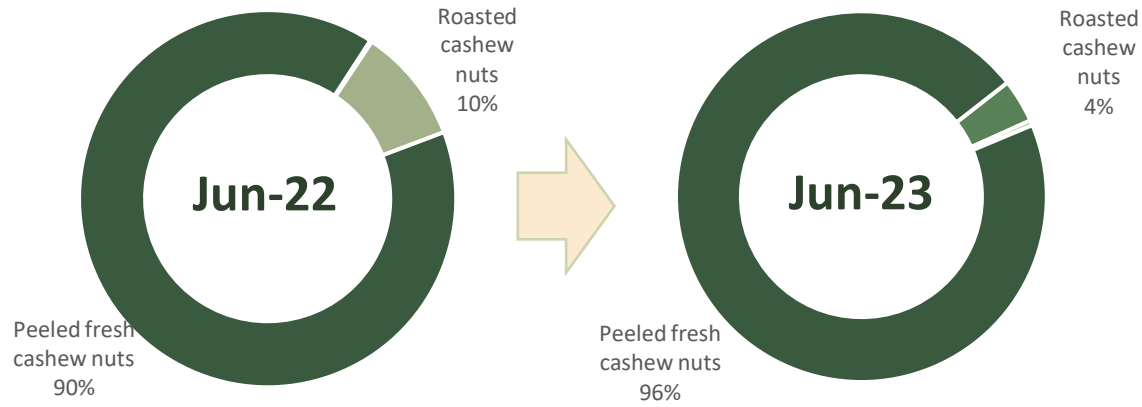
## Changes in percentage of export value to the ASEAN, Jun-2023



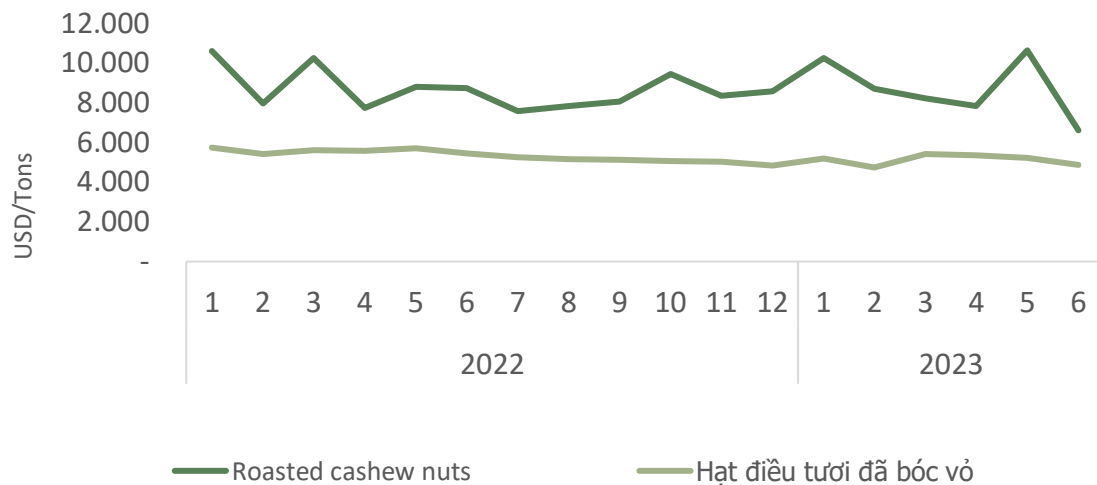


# CASHEW NUTS

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



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



## Export results to the ASEAN, Jun-2023



### Peeled fresh cashew nuts

Value: **10.2** Mil. USD  
 Increase **17.4%** compared to May-2023  
 Increase **68.1%** compared to Jun-2022



### Roasted cashew nuts

Value: **0.4** Mil. USD  
 Increase **100.7%** compared to May-2023  
 Decrease **39.4%** compared to Jun-2022

### Peeled fresh cashew nuts

The average export in Jun-2023 is **4.861** USD/tons; **Decrease 6.7%** compared to the previous month; and **Decrease 10.7%** compared to the same month of 2022.

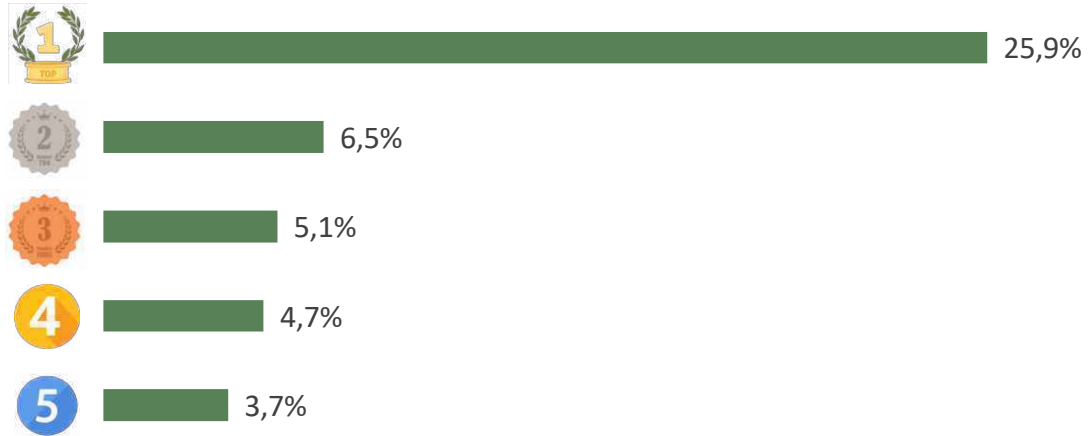
### Roasted cashew nuts

The average export in Jun-2023 is **6.612** USD/tons; **Decrease 39.7%** compared to the previous month; and **Decrease 24.3%** compared to the same month of 2022.

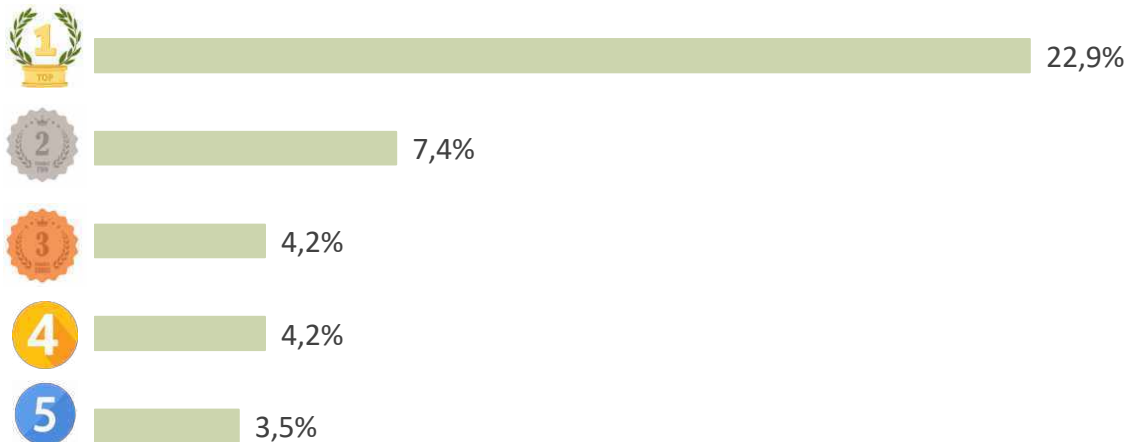


# CASHEW NUTS

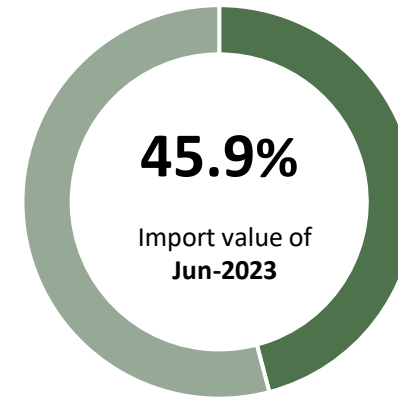
## TOP 5 export enterprises by value to the ASEAN, Jun 2023



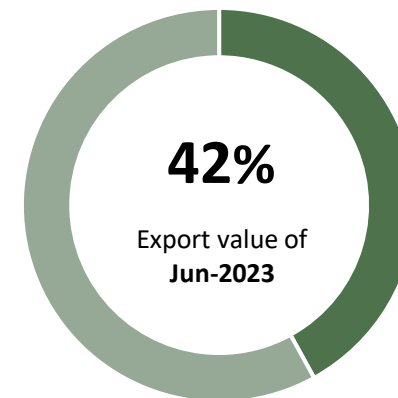
## TOP 5 export enterprises by volume to the ASEAN, Jun 2023



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



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



# CASHEW NUTS

## SPOTLIGHTS



The Ministry of Trade and the Cambodia Cashew Federation will host the World Cashew Conference in 2024 as part of efforts to promote the cashew industry and attract more investors to the sector. WCC-2024 will help raise awareness and understanding of the Cambodian cashew industry among global stakeholders, promoting exports while invigorating the Cambodian cashew industry.

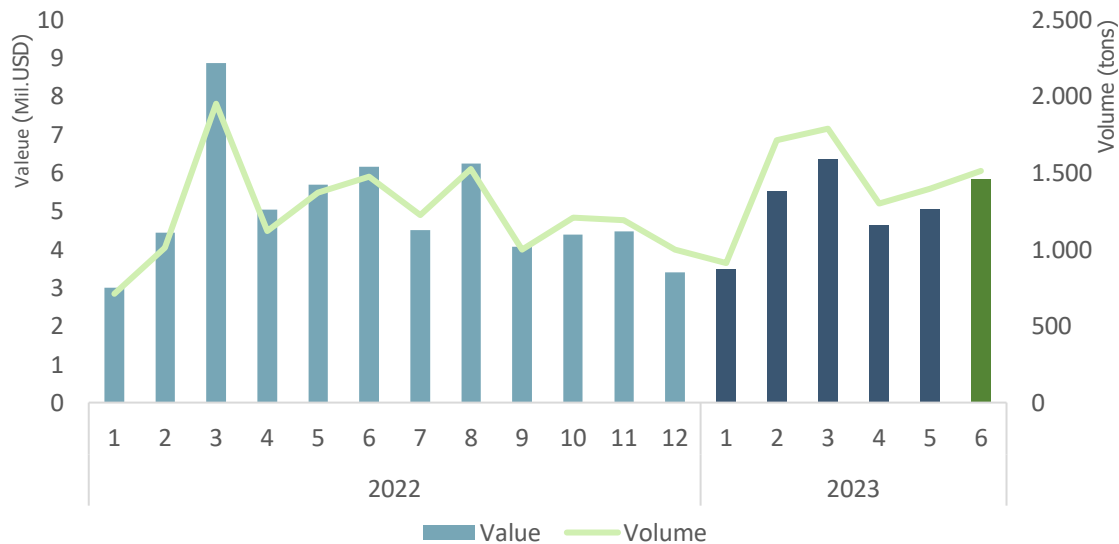
*Source: Thebettercambodia (07/2023)*





# PEPPER

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



## Export results to the ASEAN, Jun-2023

**VALUE**  
**5.8** Mil. USD

↗ Increase **15.8%** compared to May-2023

↘ Decrease **5.1%** compared to Jun-2022

↗ **824.7 thousand USD** more than the monthly average rate in 2022

Accumulated six months of 2023 reaches **30.9 Mil .USD**; **51.3%** of the total 2022

**VOLUME**  
**1.5** Thousand tons

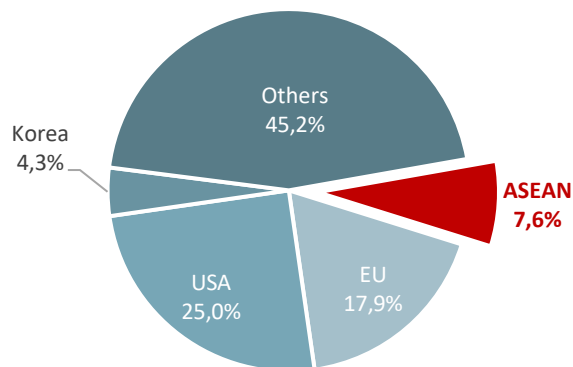
↗ Increase **8.4%** compared to May-2023

↗ Increase **2.7%** compared to Jun-2022

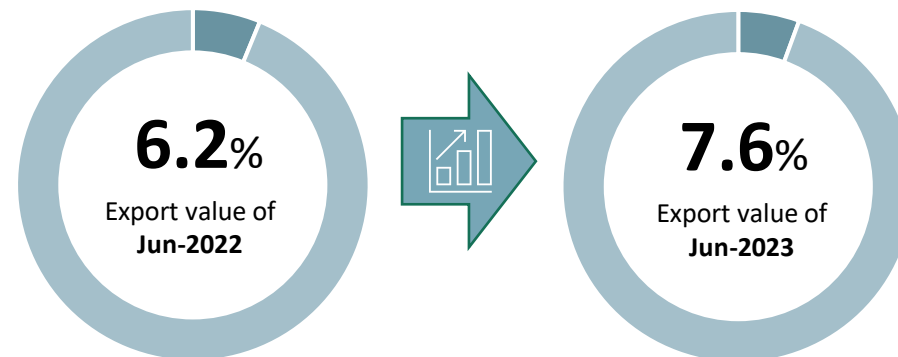
↗ **281 tons** more than the monthly average rate in 2022

Accumulated six months of 2023 reaches **8.6 thousand tons**; **58.3%** of the total 2022

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



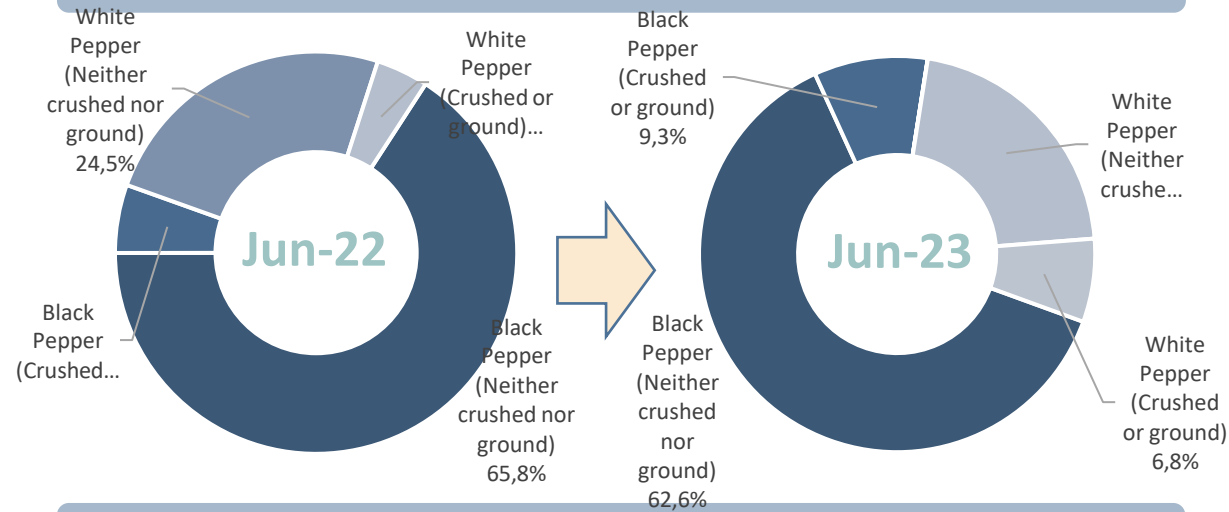
## Changes in the percentage of export value to the ASEAN, Jun-2023



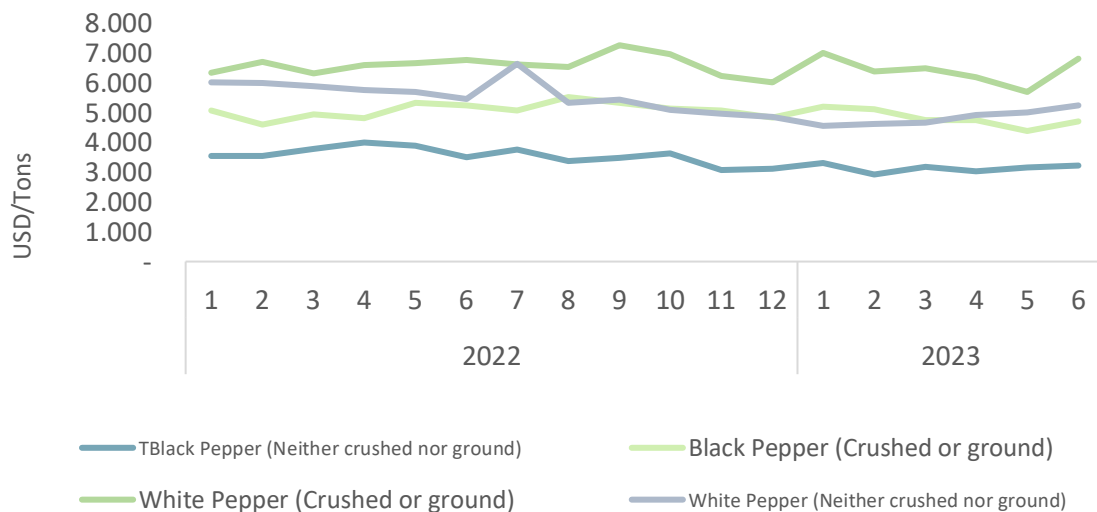


# PEPPER

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



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



## Export results to the ASEAN, Jun-2023



### Tiêu đen chưa xay

Value: **3.7** Mil. USD

Increase **4.9%** compared to May-2023

Decrease **9.7%** compared to Jun-2022



### Tiêu trắng chưa xay

Value: **1.2** Mil. USD

Increase **57.2%** compared to May-2023

Decrease **17.7%** compared to Jun-2022



### Tiêu trắng đã xay

Value: **0.4** Mil. USD

Decrease **28.4%** compared to May-2023

Increase **53.9%** compared to Jun-2022

### Black Pepper (Neither crushed nor ground)

The average export in Jun-2023 is **3.216** USD/tons; **Increase 2%** compared to the previous month; but **decrease 14%** compared to the same month of 2022.

### White Pepper (Neither crushed nor ground)

The average export in Jun-2023 is **5.236** USD/tons; **Increase 5%** compared to the previous month; but **decrease 4%** compared to the same month of 2022.

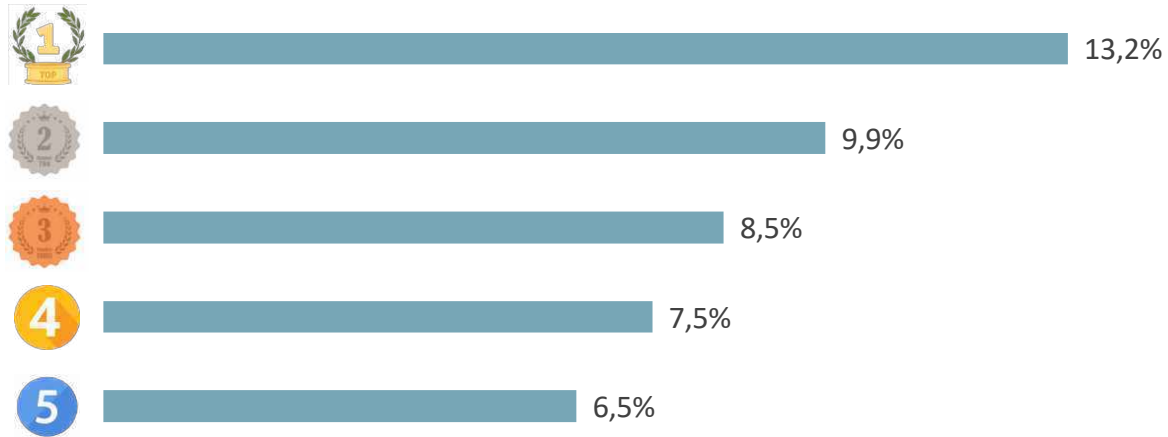
### White Pepper (Crushed or ground)

The average export in Jun-2023 is **6.816** USD/tons; **Increase 20%** compared to the previous month; and **increase 1%** compared to the same month of 2022.

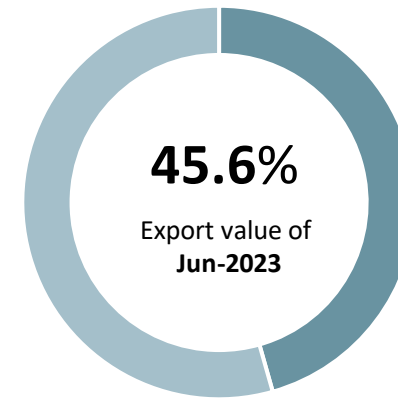


# PEPPER

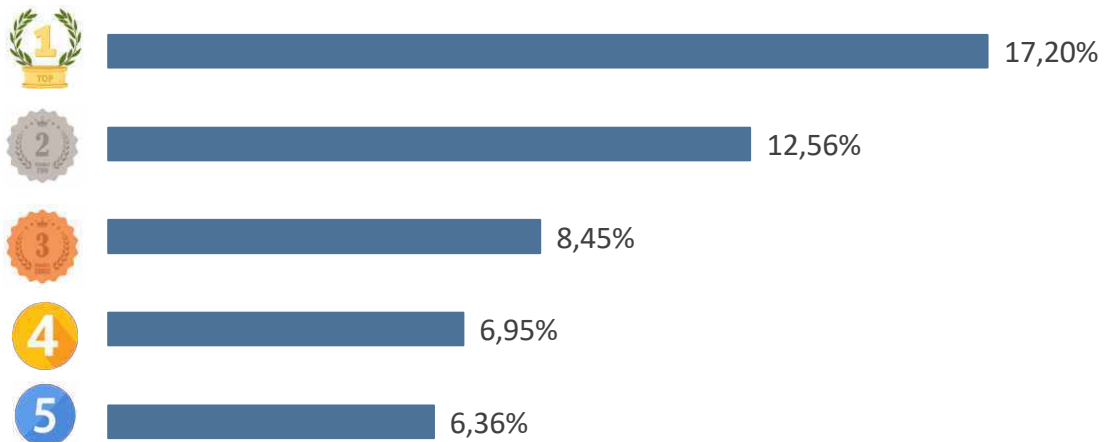
## TOP 5 export enterprises by value to the ASEAN, Jun-2023



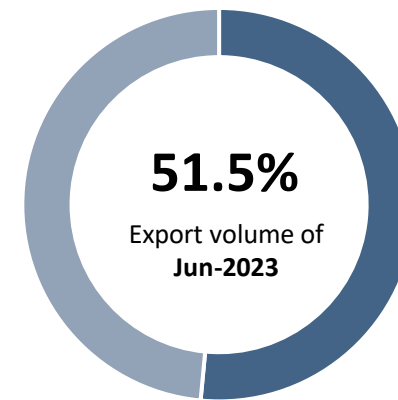
## Value ratio TOP 5 export enterprise to the ASEAN, Jun-2023



## TOP 5 enterprise by volume to the ASEAN, Jun-2023



## Volume ratio TOP 5 enterprise to the ASEAN, Jun-2023





# PEPPER



## SPOTLIGHTS

01

Currently, Cambodia is preparing the first steps to officially export pepper to China. According to the Cambodian Pepper and Spice Federation (CPSF), accessing the Chinese market will attract more interest from investors. Cambodia exports about 20,000 tons of pepper per year on average. Of which, about 80% of exports are shipped to Vietnam and the rest to other markets, such as Thailand, Japan, Taiwan, Europe and the US..

*Source : Vietnam Pepper Association(07/2023)*

02

Indonesia is the largest pepper supplier to China in the first 5 months of 2023, the volume reached over 1.6 thousand tons, worth 6.65 million USD, down 12.6% in volume and down 27.9% in value compared to the same period last year. Indonesia's pepper market share in China's total imports increased from 46.6% in the first 5 months of 2022 to 52.64% in the first 5 months of 2023.

*Source : Vietnam Pepper Association(07/2023)*

03

The 51st Annual Conference of the International Pepper Association (IPC) will be held in Sarawak, Malaysia from 6 to 9 November 2023, with two main components including a conference and exhibition. The IPC Conference is not only a gathering place for a large number of actors participating in the supply chain but also an opportunity to meet, exchange, and share experiences and information of experts in the global pepper and spice industry. bridge, including representatives from the American Spice Trade Association (ASTA), the European Spice Association (ESA), the Spice Association of China, India, Cambodia, etc. In addition to technical topics and farming trends, delegates will be updated on the latest regulations of the import market, especially reporting data on the import-export situation, consumption, and inventory. Pepper warehouses and market prices of the main pepper-producing countries in the world were presented in detail at the Conference.

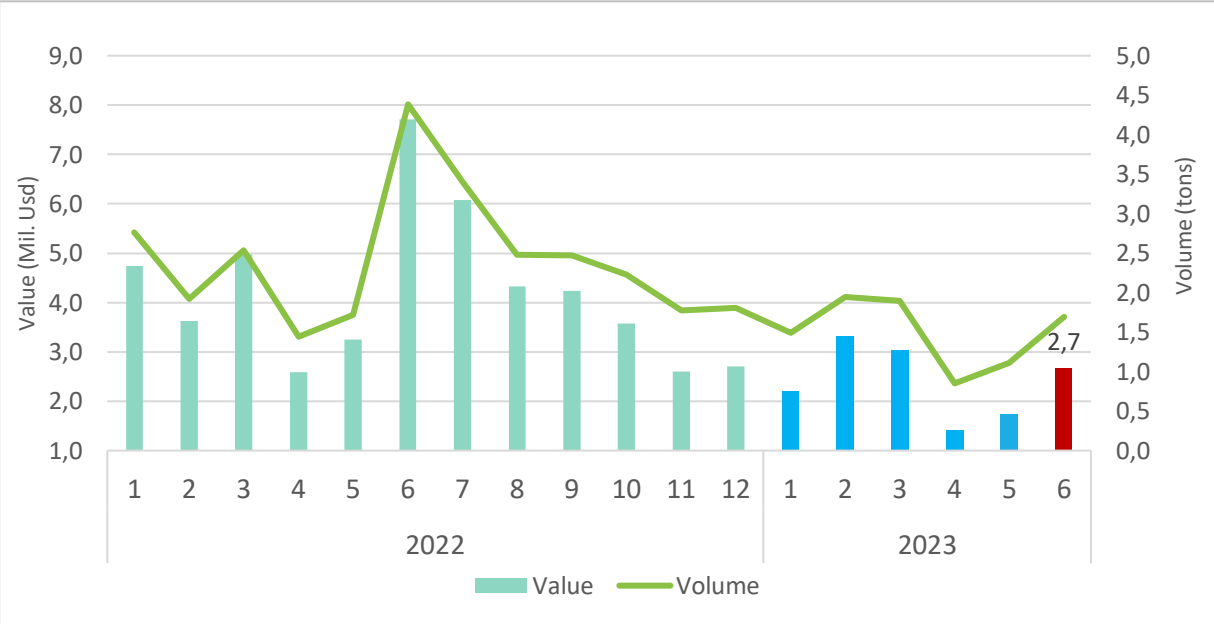
*Source : Vietnam Pepper Association(07/2023)*



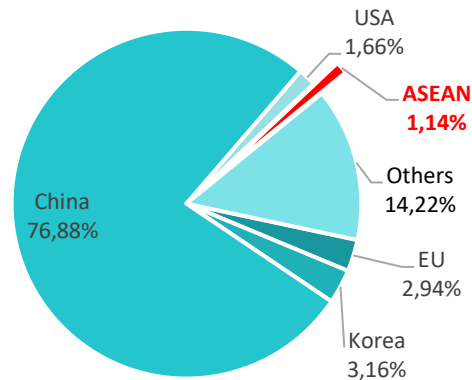


# RUBBER

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



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



## Export results to the ASEAN, Jun-2023

**VALUE**  
**2.7** Mil. USD

↗ Increase **53 %** compared to May-2023

↘ Decrease **65.4%** compared to Jun-2022

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

◊ Accumulated six months of 2023 reaches **14 Mil.USD; 28.5%** of total 2022

**VOLUME**  
**1.7** Thousand tons

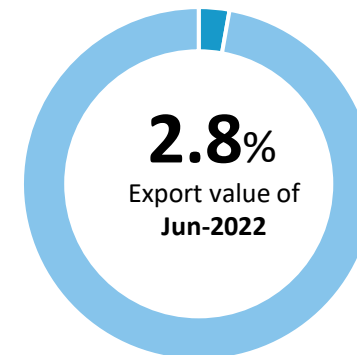
↗ Increase **52.2%** compared to May-2023

↘ Decrease **61.4%** compared to Jun-2022

↘ **0.7 Thousand tons** less than the monthly average rate in 2022

◊ Accumulated six months of 2023 reaches **9 thousand tons; 31.0%** of total 2022

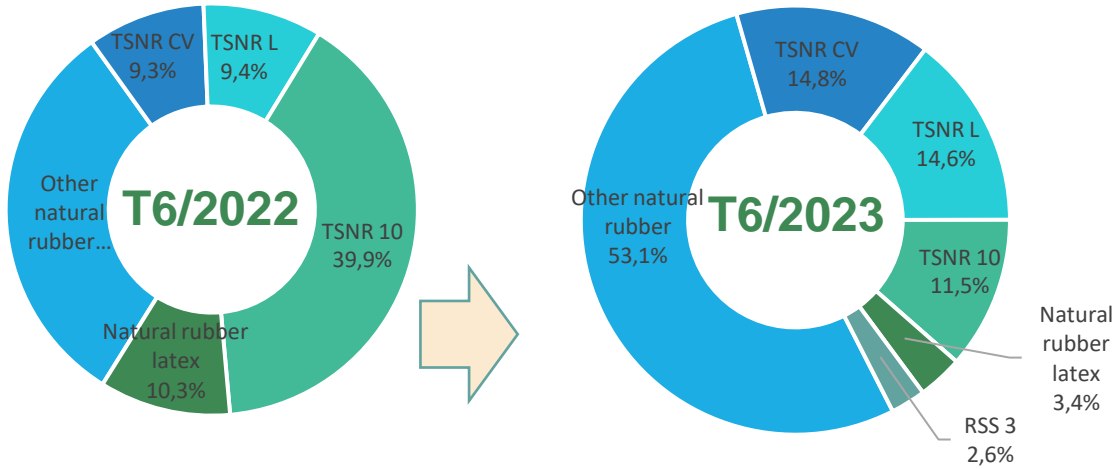
## Changes in the percentage of export value to the ASEAN, Jun-2023





# RUBBER

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



## Export results to the ASEAN, Jun-2023



### Other natural rubber

Value: **1.3** Mil. USD  
 Increase **23.4%** compared to May-2023  
 Decrease **43.1%** compared to Jun-2022



### TSNR CV

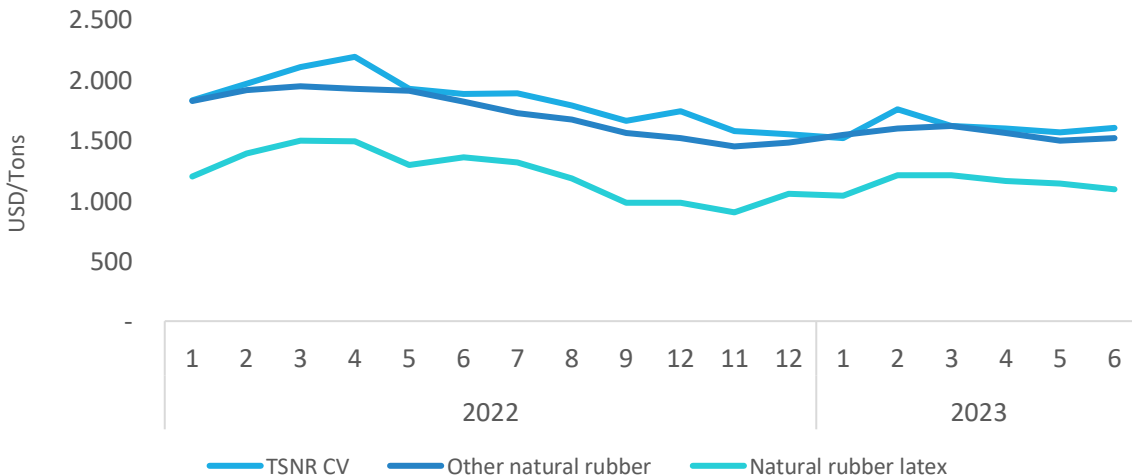
Value: **0.4** Mil. USD  
 Decrease **2.9%** compared to May-2023  
 Decrease **46.6%** compared to Jun-2022



### Natural rubber latex

Value: **0.08** Mil. USD  
 Decrease **27.2%** compared to May-2023  
 Decrease **89.0%** compared to Jun-2022

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



### Other natural rubber

The average export in Jun-2023 is **1.521** USD/tons; **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 Jun-2023 is **1.602** USD/tons; **Increase 2.2%** compared to the previous month; but **Decrease 15.1%** compared to the same month of 2022.

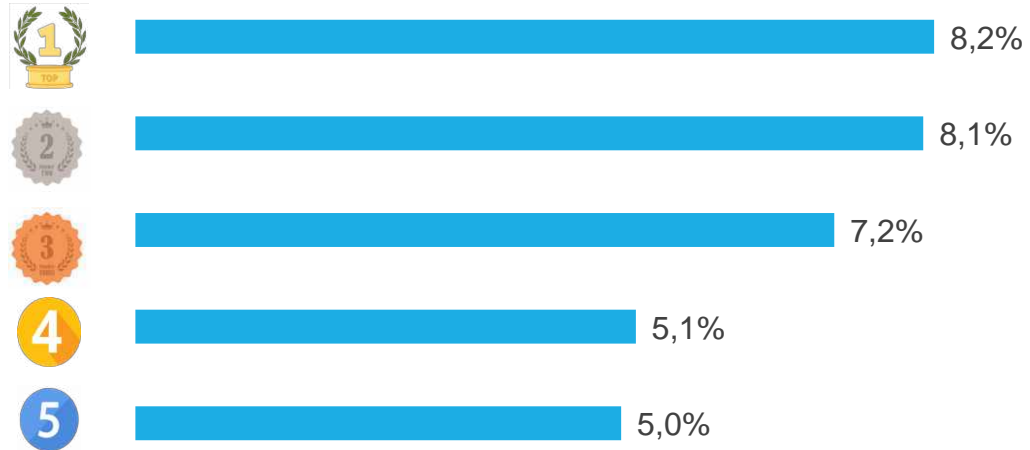
### Natural rubber latex

The average export in Jun-2023 is **1.096** USD/tons; **Decrease 4.2%** compared to the previous month; and **Decrease 19.3%** compared to the same month of 2022.

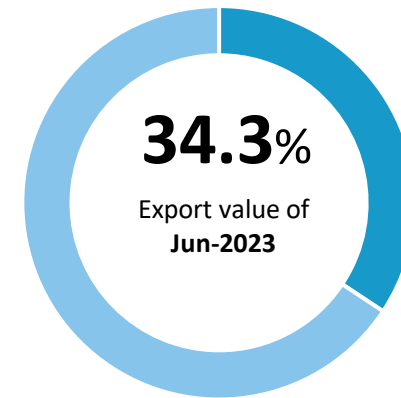


# RUBBER

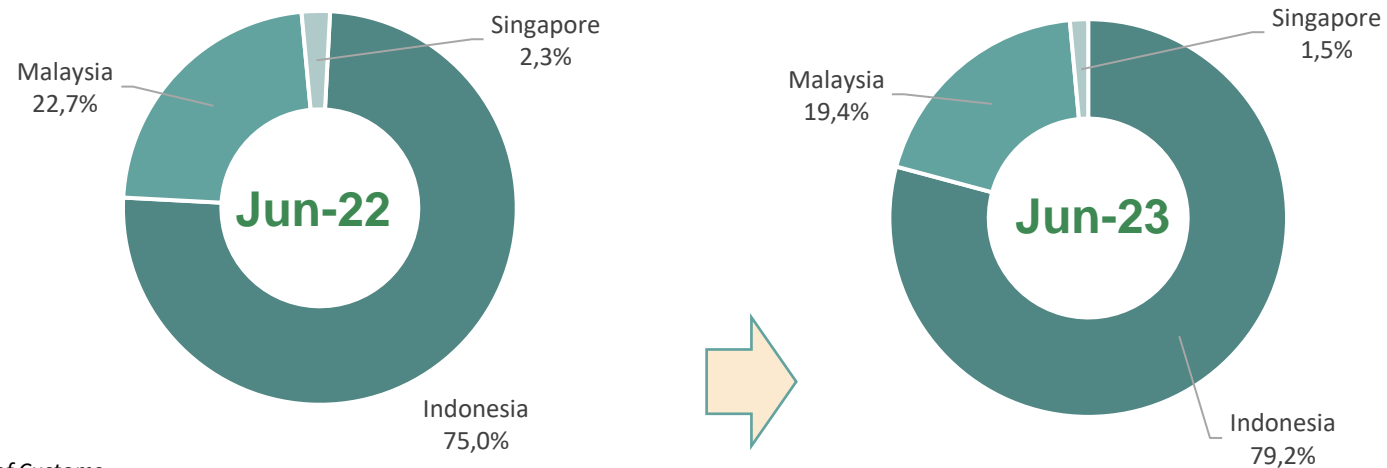
## TOP 5 export enterprises by value to the ASEAN, Jun-2023



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



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





# RUBBER

## SPOTLIGHTS

### The Thai rubber industry faces comprehensive challenges

According to the Trade Policy of the Ministry of Commerce of Thailand (TPSO), Thailand produced 4.8 million tons of rubber in 2022, accounting for 33% of the world's total rubber output, and ranked 2nd in the world after China. However, Thai rubber products are facing comprehensive challenges. One of the biggest challenges is geo-political polarization. This makes countries increasingly interested in self-sufficiency, which may reduce the demand for rubber products imported from Thailand. Another challenge is that other countries are developing new rubbers that can compete with Thai rubber in terms of price and quality.

In addition to Thailand's existing main export markets, which are China, the United States, Malaysia, and Japan, it is also important to pay attention to emerging markets such as the Middle East, India, Africa, and Latin America.

*Source: yourubber.com*

❖ Myanmar Rubber Growers and Producers Association (MRPPA) said Myanmar plans to export about 300,000 tons of natural rubber in the 2023-2024 fiscal year, 70% of which is exported to China, the majority of the rest are exported to Singapore, Indonesia, Malaysia, Vietnam, Korea, India, Japan and other countries. In the 2022-2023 fiscal year, Myanmar's total natural rubber output reached 360,000 tons, of which more than 200,000 tons were exported. It is known that the Tanintharyi region and Mon state are the areas with the largest number of natural rubber plantations in Myanmar. Currently, the natural rubber planting area in the country has exceeded 100,000 hectares, and about 190,000 tons of natural rubber are exported to China, India, Thailand, Malaysia, Indonesia, Singapore, and Korea every year.

*Source : Myanmar Rubber Growers and Producers Association (MRPPA)*





# SEAFOOD

## Export value to the ASEAN, Jun-2023



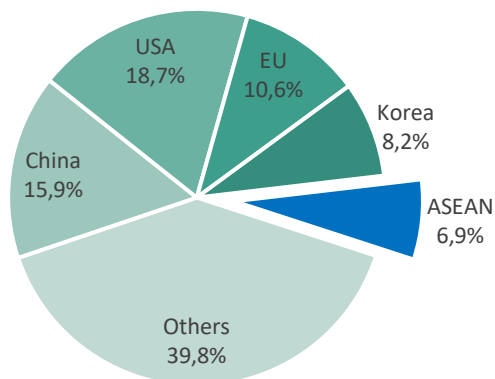
## Export results to the ASEAN, Jun-2023

**VALUE**

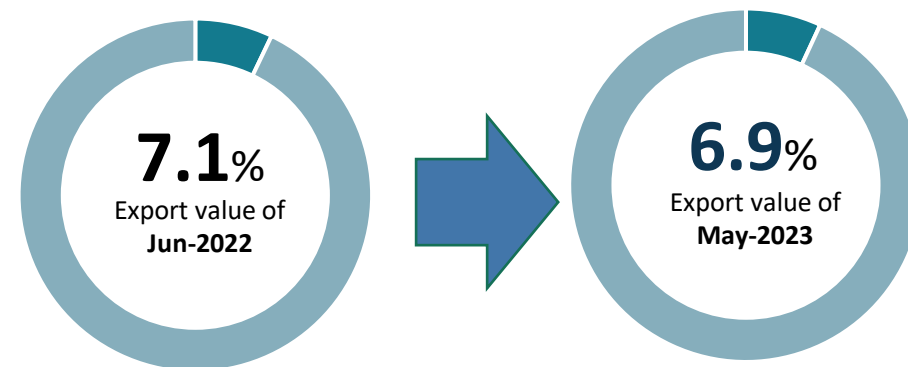
**52.7 Mil. USD**

- ↘ Decrease **9.9%** compared to May-2023
- ↘ Decrease **30.6%** compared to Jun-2022
- ↘ **12.3 Mil. USD** less than the monthly average rate in 2022
- ◇ Accumulated six months of 2023 reaches **327.9 Mil. USD**; **42.1%** of the total 2022

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



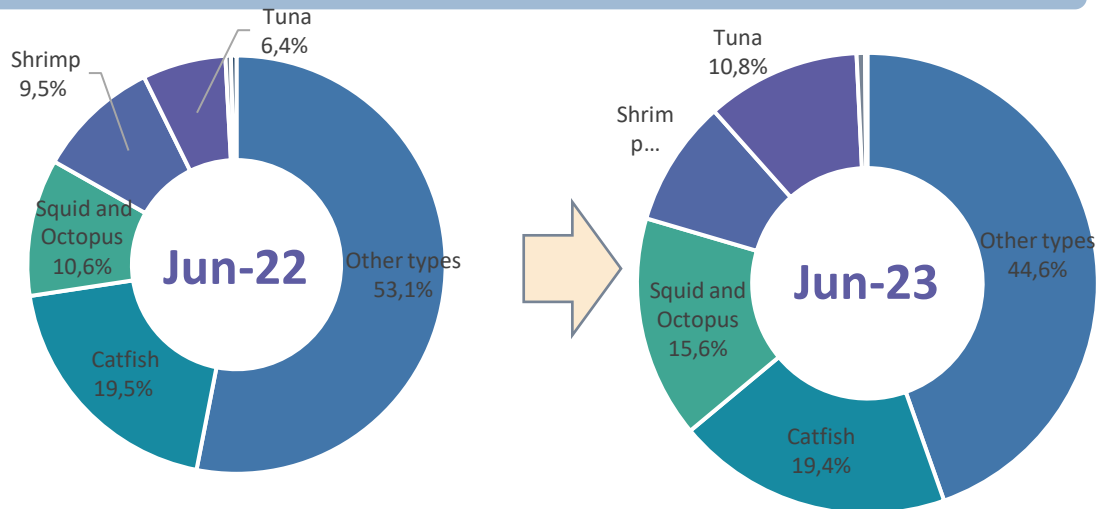
## Change in percentage of export to the ASEAN, Jun-2023



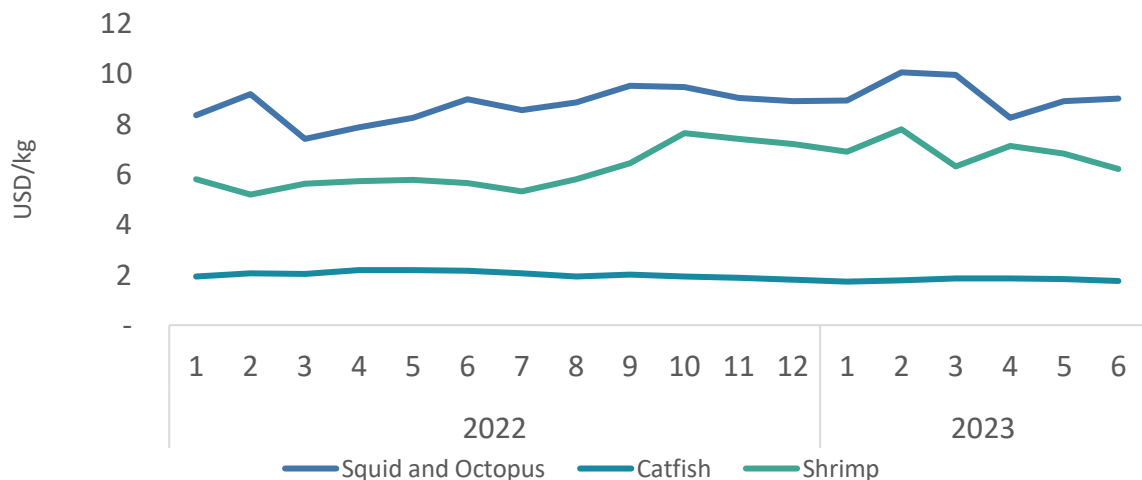
# SEAFOOD



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



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



## Export results to the ASEAN, Jun-2023



### Catfish

Value: **10.0** Mil. USD

Decrease **18.0%** compared to May-2023

Decrease **32.0%** compared to Jun-2022



### Squid and Octopus

Value: **8.1** Mil. USD

Increase **10.8%** compared to May-2023

Increase **1.1%** compared to Jun-2022



### Shrimp

Value: **4.6** Mil. USD

Decrease **20.1%** compared to May-2023

Decrease **35.9%** compared to Jun-2022

### Squid and Octopus

The average export in Jun-2023 is **9.0** USD/kg; **Increase 1.1%** compared to the previous month; and **Increase 0.3%** compared to the same month of 2022.

### Catfish

The average export in Jun-2023 is **1.8** USD/kg; **Decrease 3.6%** compared to the previous month; and **Decrease 18.1%** compared to the same month of 2022.

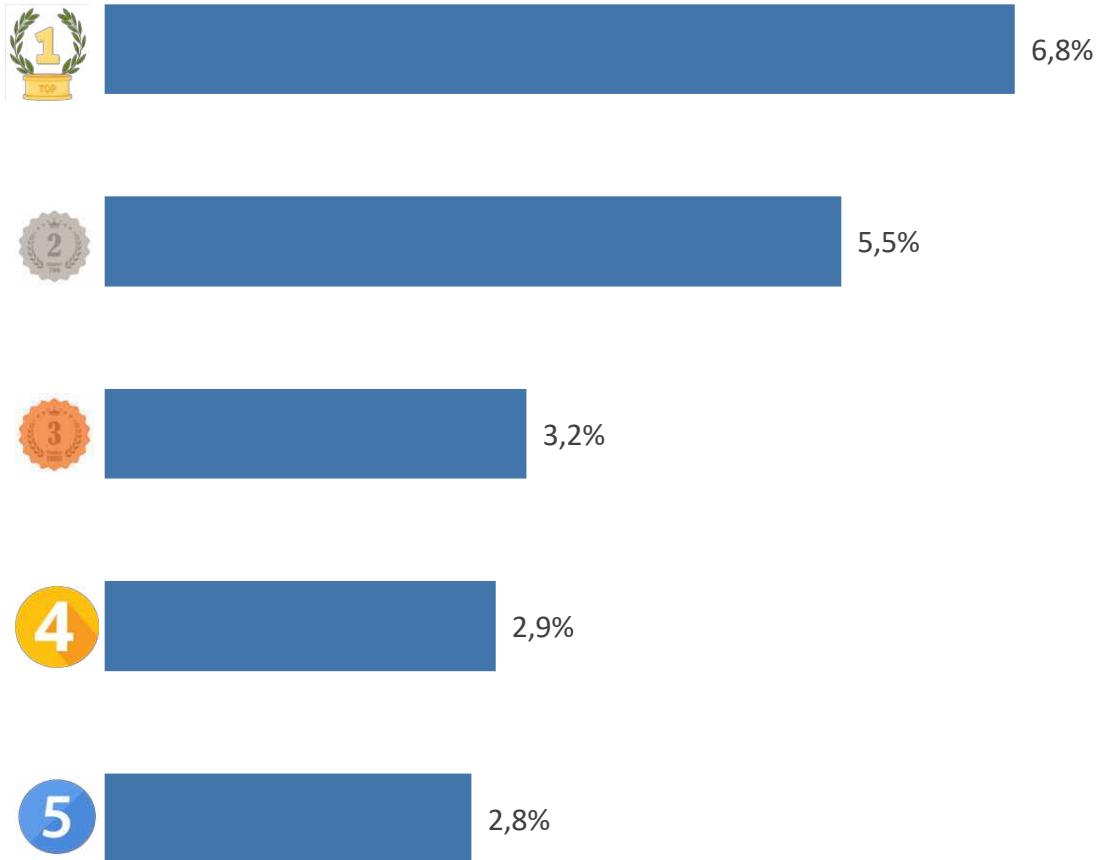
### Shrimp

The average export in Jun-2023 is **6.2** USD/kg; **Decrease 8.8%** compared to the previous month; and **Increase 10.0%** compared to the same month of 2022.

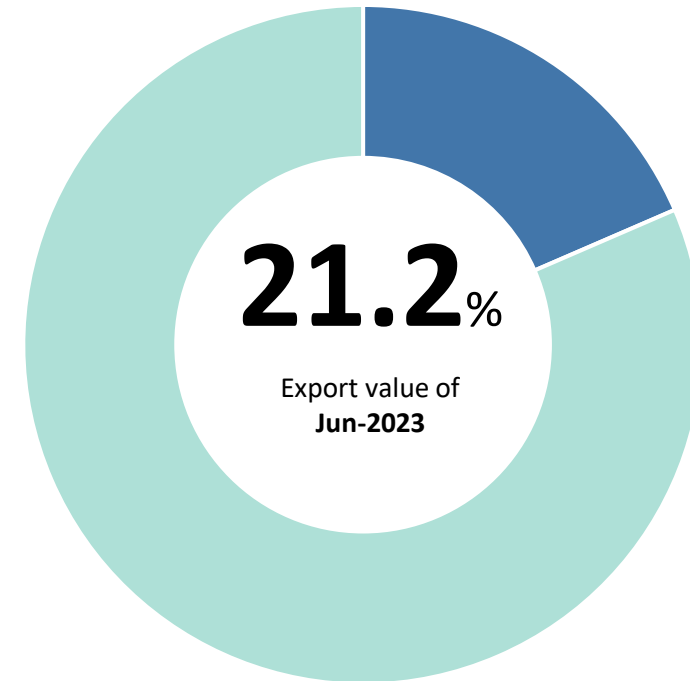


# SEAFOOD

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



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





01

### Thailand's tuna exports decrease to the lowest level in 10 years

In the 4 months of 2023, Thailand's tuna exports reached 153 thousand tons, down 14% compared to the same period in 2022. According to the World Trade Center (ITC), this is the lowest volume in the past 10 years. . The reason is that the price of raw tuna has increased to a record level, leading to an increase in canned tuna prices and high inventories of retailers in main markets such as the US and Canada. Thai tuna businesses are looking to boost exports to small and potential markets such as Middle East and Latin American countries to compensate.

*Source :Vasep (7/2023)*

02

### Indonesia plans to cut Decrease tuna fishing output to restore reserves

Indonesia's fisheries ministry recently released a document on a strategy to gradually reduce tuna catch volumes over three years, citing declining populations of skipjack and yellowfin tuna. The strategy is expected to take effect in 2026 at the latest and will be implemented through a ministerial-level decree. Indonesia currently accounts for about 16% of the world's total tuna supply, with a catch of 791,000 tons in 2021, worth 1.47 billion USD. Indonesia will reduce total tuna catch by 10% compared to 2021 levels within three years of the strategy taking effect to ensure the long-term sustainability of the country's fisheries.

*Source : Vasep(7/2023)*



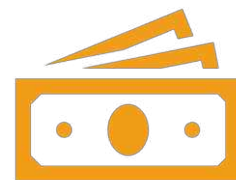


# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to the ASEAN, Jun-2023



## Export results to the ASEAN, Jun-2023



### VALUE

**6.8**  
Mil. USD

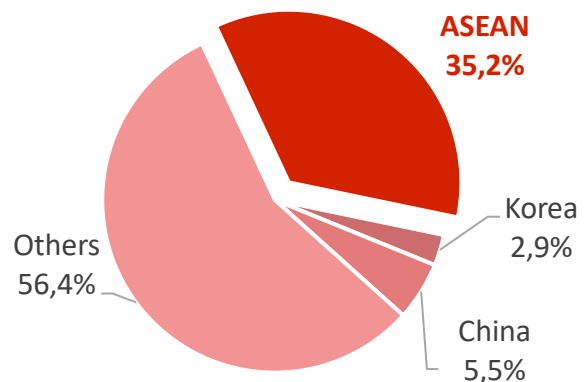
↗ Increase **167.7%** compared to May-2023

↗ Increase **65.6%** compared to Jun-2022

↑ **4.9 Mil. USD** more than the monthly average rate in 2022

◇ Accumulated six months of 2023 reaches **18.2 Mil. USD**; **79.5%** of the total 2022

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



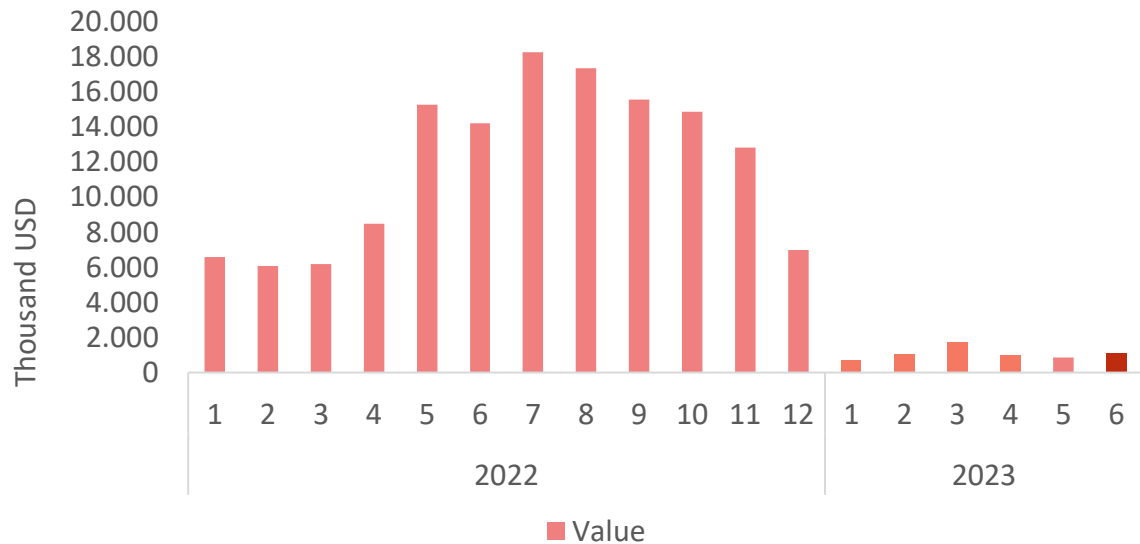
## Changes in percentage of export value to the ASEAN, Jun-2023





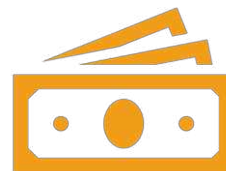
# MEAT & MEAT PRODUCTS (EXPORT)

## Import value from the ASEAN, Jun-2023



## Import results from the ASEAN, Jun-2023

### VALUE



**1.04**  
Mil. USD

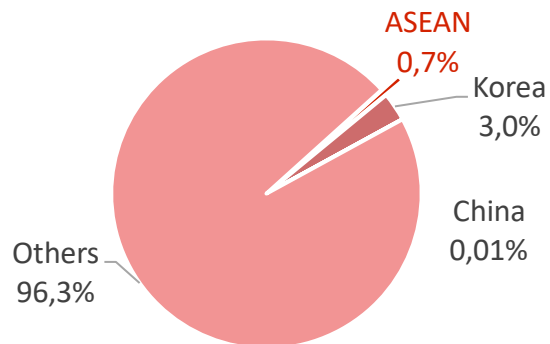
↗ Increase **25.6%** compared to May-2023

↘ Decrease **92.6%** compared to Jun-2022

↓ Decrease **10.8 Mil. USD** the monthly average rate in 2022

Accumulated 6 months of 2023 reaches **6.2 Mil. USD**; **4.4%** of the total 2022

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



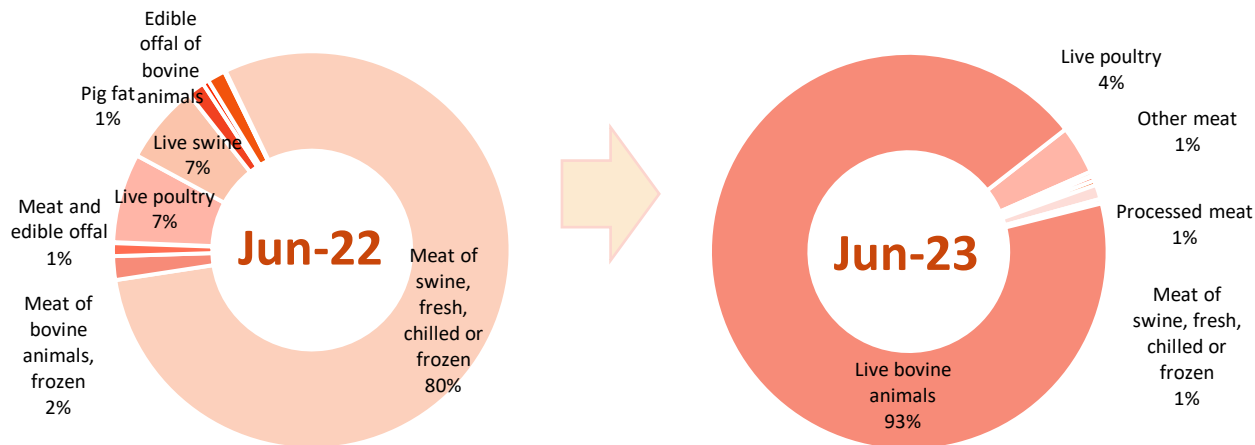
## Changes in the percentage of import value from the ASEAN, Jun-2023





# MEAT & MEAT PRODUCTS (EXPORT)

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



## Import results to the ASEAN, Jun-2023



### Live bovine animals

Value: **6.4** Mil. USD  
Increase **195%** compared to May-2023



### Live poultry

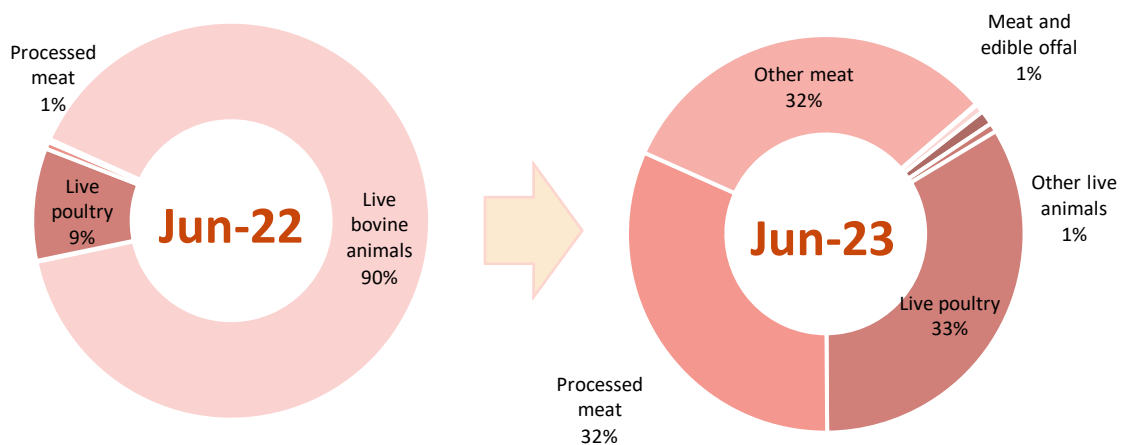
Value: **270** thousand USD  
Increase **102%** compared to May-2023  
Decrease **9.6%** compared to Jun-2022



### Live swine

Value: **79.6** thousand USD  
Increase **41 times** compared to May-2023  
Decrease **97.6%** compared to Jun-2022

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



## Export results the ASEAN, Jun-2023



### Live poultry

Value: **354** thousand USD  
Decrease **53%** compared to May-2023  
Decrease **73%** compared to Jun-2022



### Thịt chế biến

Value: **336** thousand USD  
Increase **329%** compared to May-2023  
Increase **316%** compared to Jun-2022



### Others

Value: **338** thousand USD  
Increase **864%** compared to Jun-2022

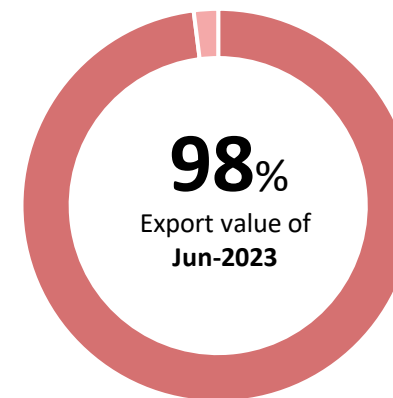


# MEAT & MEAT PRODUCTS

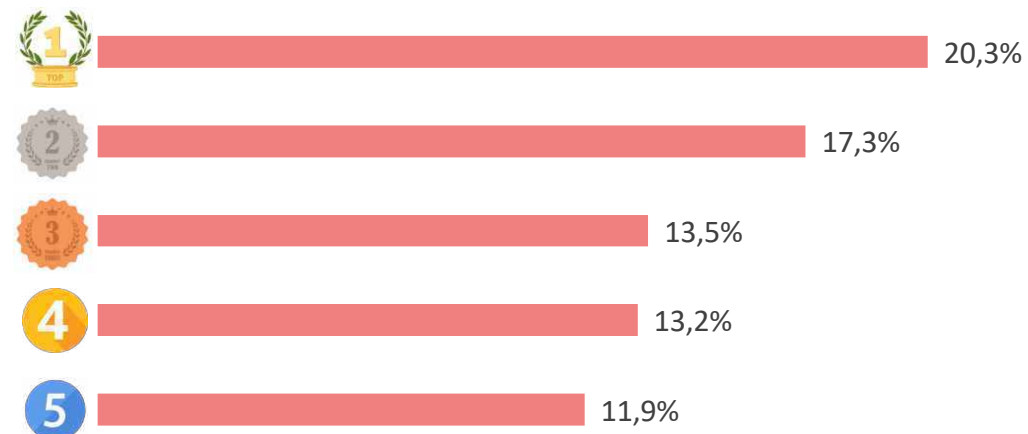
## TOP 5 export enterprises by value to the ASEAN, May 2023



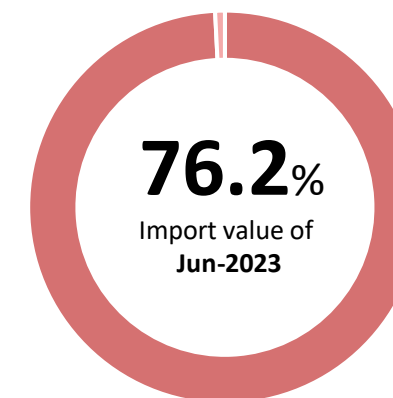
## Value ratio of TOP 5 export enterprises to the ASEAN, May 2023



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



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





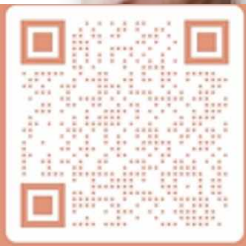
# MEAT & MEAT PRODUCTS

## SPORLIGHT



The outbreak of African swine fever (ASF) in the Philippines has had a strong impact on the country's pig industry. As of July 2023, the ASF virus has been detected in 460 towns and 54 provinces in the country, leading to the culling of more than 3 million pigs. The Philippine government has taken a number of measures to try to control the ASF outbreak, including Culling infected pigs, banning the transport of pigs and pork products, and increasing safety measures.

*Source: Selinawamucii (7/2023)*



# COMMENTS AND REVIEW

## RICE

According to the Vietnam Food Association, Vietnam's rice exports will continue to be favorable until the end of the year because India bans the export of all types of rice, and rice output in many other Asian countries is at risk of decline due to negative impacts. El Nino's movements.

Besides, India's ban on rice exports makes world rice prices continue to rise sharply in the coming time. While Vietnam is one of the leading rice exporting countries, it will have many advantages in exporting, especially in selling prices.



## CASHEW NUTS

According to IPC, Indonesia's pepper production will decrease by 15% in 2023. This decrease may cause the market share of Indonesian pepper output supplied to the world to decrease to 10% in 2023. Accordingly, exports Indonesia's exports will continue to decline in 2023.

For Malaysia, ICP said that the country's pepper output is forecast to reach 23,000 tons in 2023 and pepper exports will increase this year.



## FRUITS AND VEGETABLES

A representative of the Vietnam Trade Office in Thailand said that Thailand is considered the fruit capital of the region but also a potential market for Vietnamese lychees.

The quality and season of lychee, as well as other agricultural products, are important factors for entering the Thai market. It is expected that in 2024, fresh lychee exporters will export about 1,000-2,000 tons of lychee to the Thai market. This will contribute significantly to the growth and development of the agricultural sector





Any comments, please send to:

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INSTITUTE OF POLICY AND STRATEGY FOR AGRICULTURE AND RURAL DEVELOPMENT

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

