

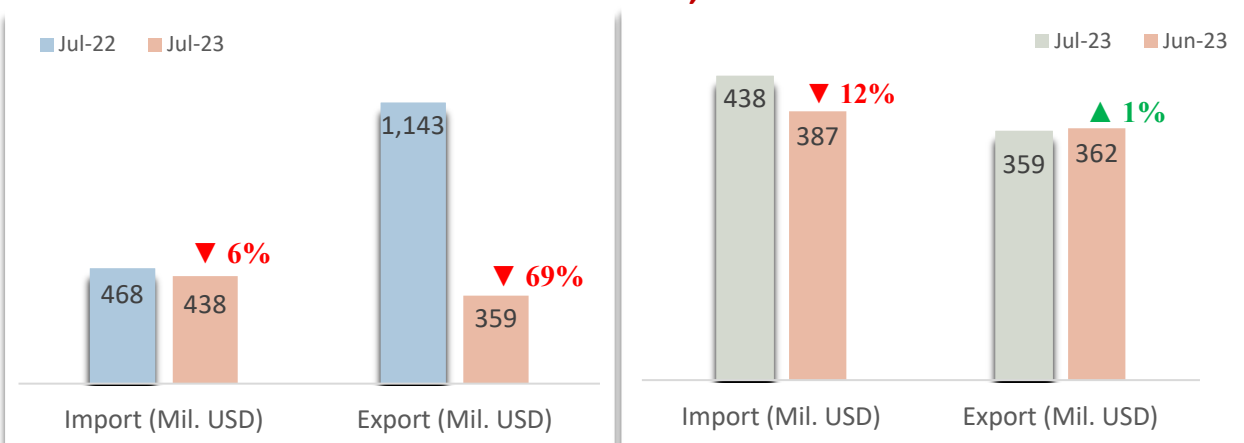
MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **ASEAN MARKET**

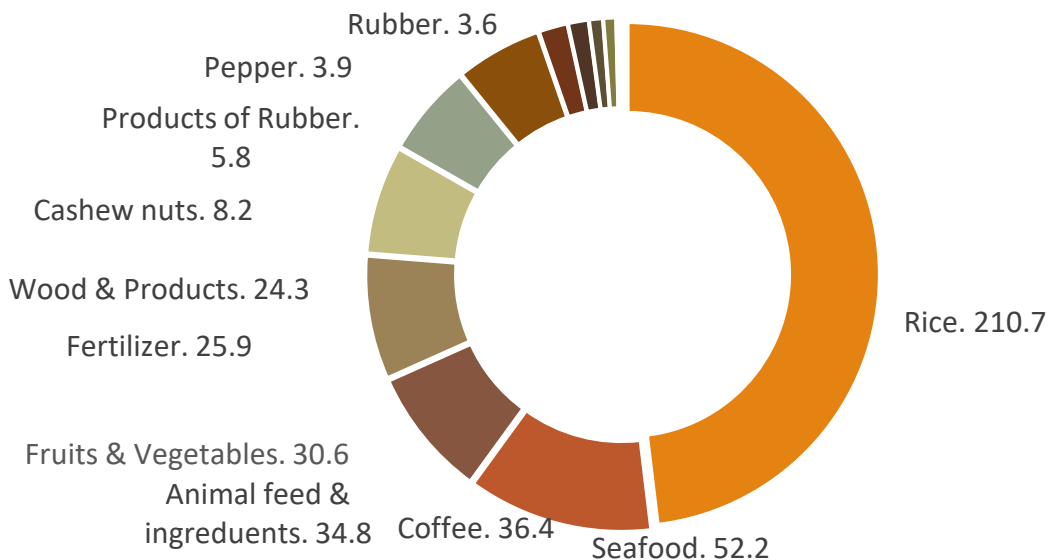


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN JULY 2023

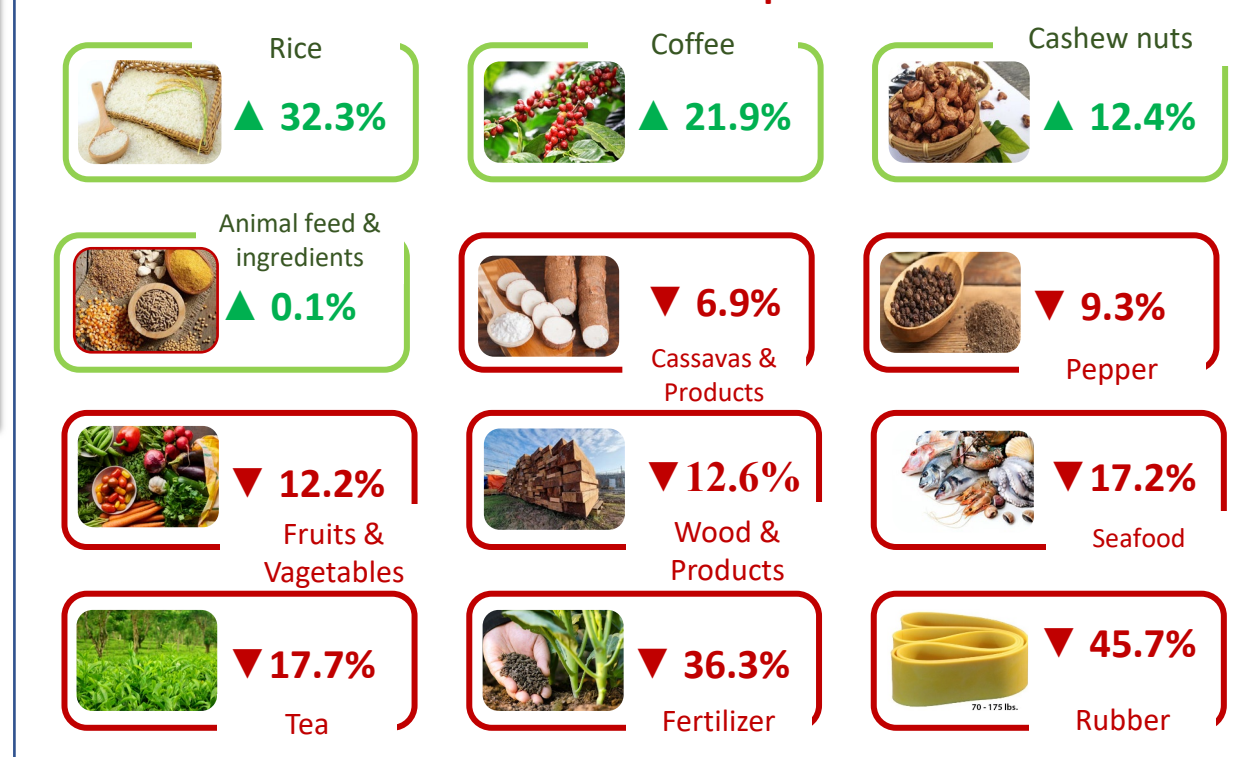
AFF product Import- Export turnover between Vietnam – ASEAN, Jul-2023



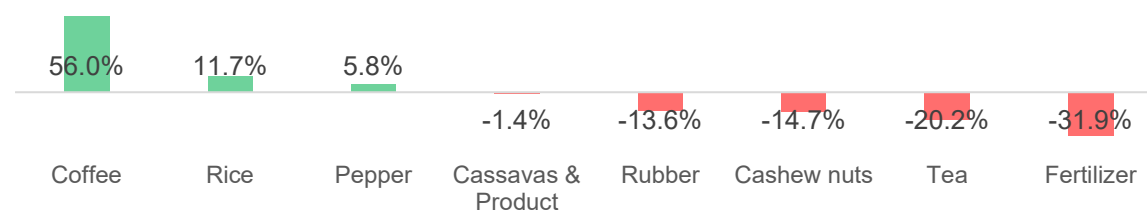
AFF key product export value to the ASEAN, Jul-2023



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



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



SPOTLIGHTS

ASEAN: Promoting cross-border electricity trade

The 4th ASEAN Online Sales Day (AOSD) 2023 takes place in two weeks, from August 8 to August 22, 2023, organized by the ASEAN Coordinating Committee on E-commerce. This is the largest online shopping event in Southeast Asia, bringing together the best goods and services from across the region on a single e-commerce platform at onlineasean.com. AOSD has two levels:

- Level for domestic transactions: Reputable businesses and e-commerce platforms in 10 ASEAN countries deploy a series of special discount shopping programs for consumers in that country.
- The level of cross-border transactions, businesses, and platforms will coordinate the implementation of cross-border online shopping programs among ASEAN countries

AOSD hopes to drive the region towards digital platforms, encourage consumers and businesses to participate in e-commerce, promote digital commerce in the area, and strengthen cooperation among stakeholders.

Source: aecvcci.vn



ASEAN: Promoting cross-border electricity trade



ASEAN and China reached economic cooperation agreements worth 1.7 billion USD

ASEAN and China reached economic cooperation agreements worth 1.7 billion USD

ASEAN and the Guangdong-Hong Kong-Macau Greater Bay Area of China have signed seven economic cooperation agreements worth 1.7 billion USD. These agreements include industrial park construction projects, digital economy, and agricultural cooperation. The signing was completed within the framework of the 2023 ASEAN-China Greater Bay Economic Cooperation (Qianhai) Forum, taking place from July 29-30 in Shenzhen, Southern China.

This year's forum marks the establishment of the Greater Bay Area - ASEAN International Chamber of Commerce Alliance and the China-ASEAN Partnership Think Tank. The parties agreed to promote an initiative to develop the Greater Bay Area - ASEAN economic partnership more closely.

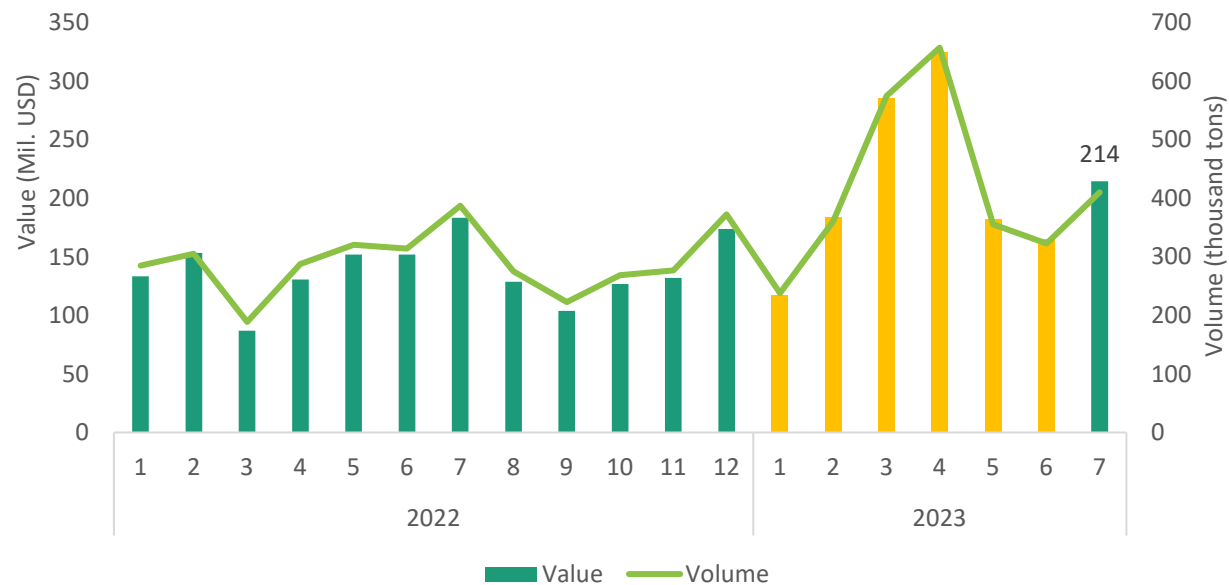
Source: aecvcci.vn





RICE

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



Export results to the ASEAN, Jul-2023

VALUE

214.5 Mil. USD

↗ Increase **29.9%** compared to Jun 2023

↗ Increase **17.0%** compared to Jul 2022

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

◇ Accumulated seven months of 2023 reaches **1.5 bil. USD; 89.0%** of the total 2022

VOLUME

410.6 thousand tons

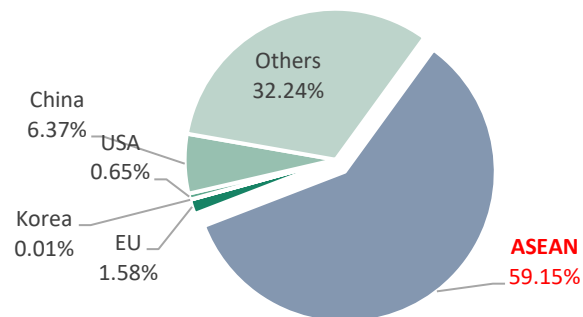
↗ Increase **27.2%** compared to Jun 2023

↗ Increase **6.0%** compared to Jul 2022

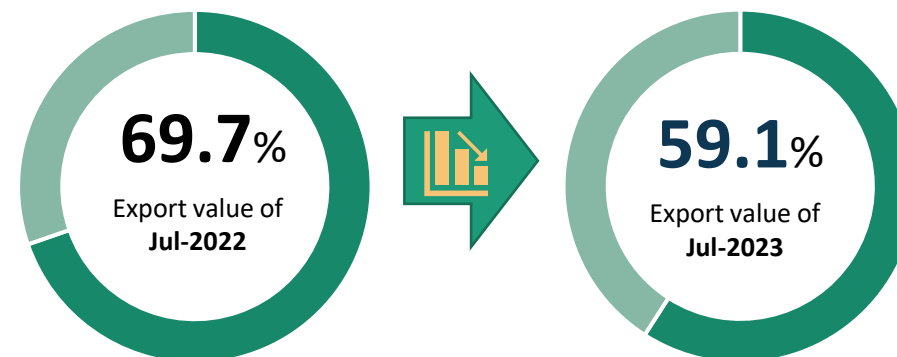
↗ **118.4 thousand tons** more than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **2.9 mil. tons; 83.3%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



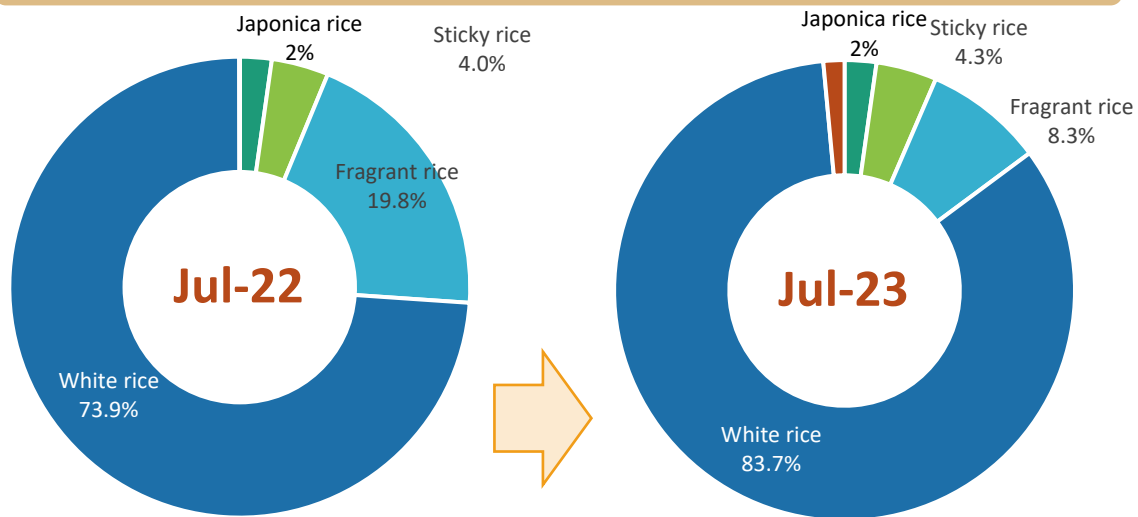
Changes in the percentage of export value to the ASEAN, Jul-2023





RICE

Structure of exports by products to the ASEAN



Average export rice price to the ASEAN, Jun-2023



White rice

Value: **179.5** Mil. USD

Increase **33%** compared to Jun 2023

Increase **22%** compared to Jul 2022

Fragrant rice

Value: **17.9** Mil. USD

Increase **78%** compared to Jun 2023

Decrease **55%** compared to Jul 2022

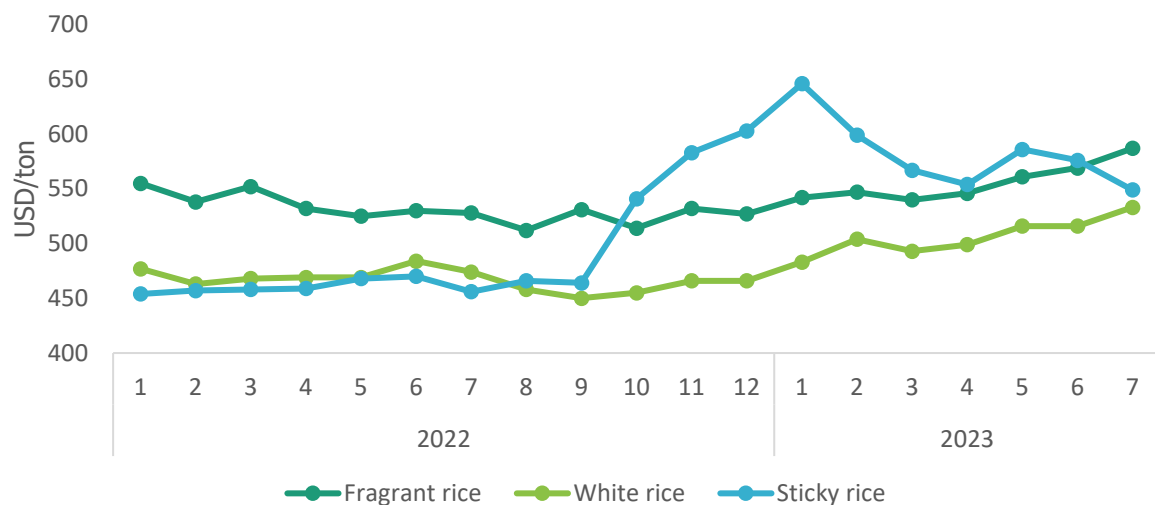
Sticky rice

Value: **9.1** Mil. USD

Increase **84%** compared to Jun 2023

Increase **14%** compared to Jul 2022

Average export rice price to the ASEAN, Jun-2023



Sticky rice

The average export in Jul-2023 is **549** USD/Ton; **Decrease 5%** compared to the previous month; and **Increase 20%** compared to the same month of 2022.

Fragrant rice

The average export in Jul-2023 is **587** USD/Ton; **Increase 3%** compared to the previous month; and **Increase 11%** compared to the same month of 2022.

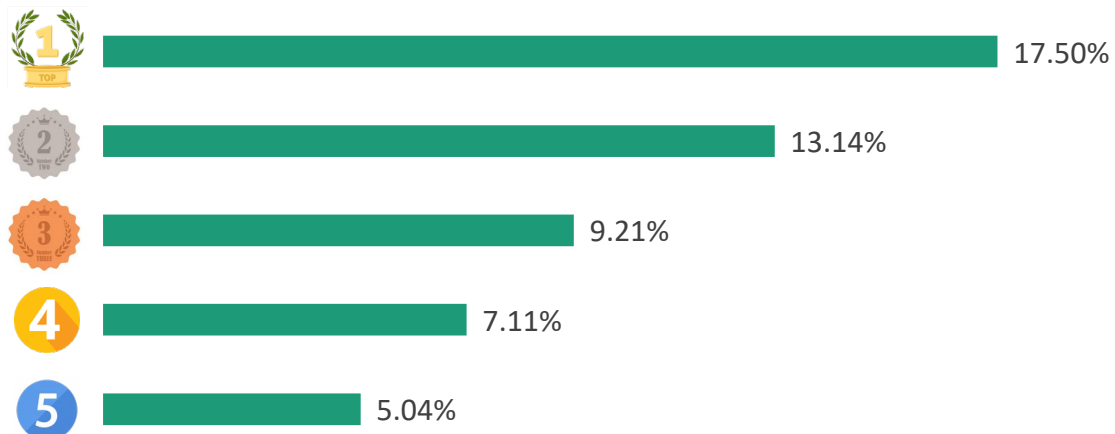
White rice

The average export in Jul-2023 is **533** USD/Ton; **Increase 3%** compared to the previous month; and **Increase 12%** compared to the same month of 2022.

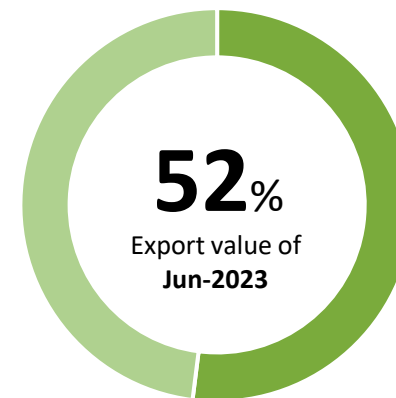


RICE

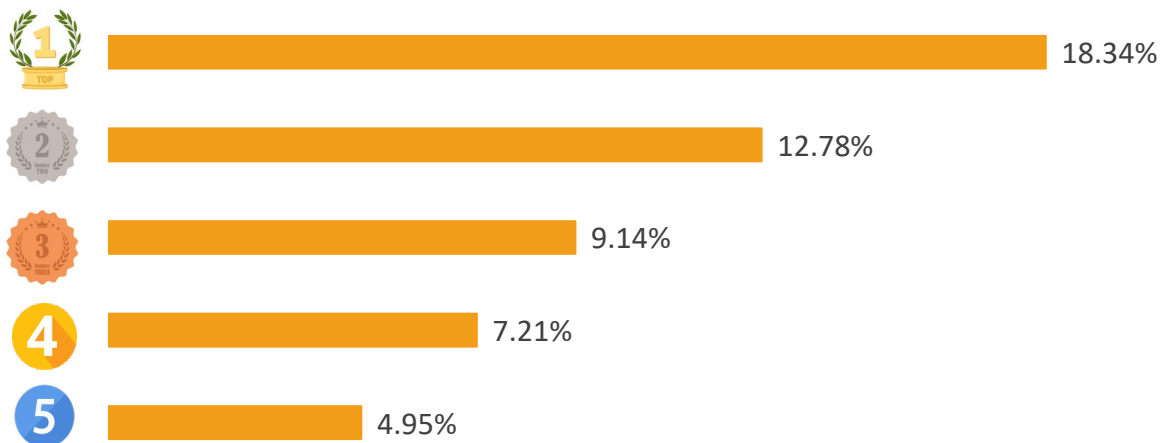
TOP 5 export enterprises by value to the ASEAN, Jul-2023



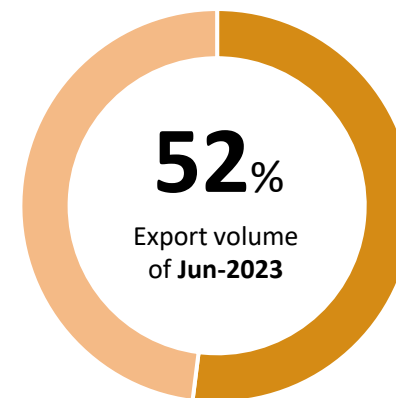
Value ratio of TOP 5 export enterprises to the ASEAN, Jul-2023



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



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





RICE

SPOTLIGHTS

01

Indonesia's state-owned food purchasing company, Bulog, plans to import Binh from Cambodia and Myanmar to add to the government's stockpile. This move is in anticipation of potential disruptions to production due to the impact of El Nino. On March 24, 2023, Indonesia announced an import quota of 2 million tons of crystal for 2023.

Source: Nasdaq.com

02

The Philippines received lower quotes from 30 USD to 40 USD per ton of rice from Vietnamese exporters. Besides, the Philippines is negotiating with India to buy more rice. The Philippines wants India to export rice on humanitarian grounds. This will allow the Philippines to import an additional 300,000 tons to 500,000 tons of rice this year.

Source: Thanhnien.vn

03

According to the Myanmar Rice Federation, this country exported 58,334 tons of rice and broken rice in July 2023. Myanmar has exported rice to 20 countries, including the Philippines, Spain, Poland, China, Belgium and the Netherlands. In the 2022/23 calendar year (from April 2022 to March 2023), this country exported more than 2.2 million tons of rice and rice valued at 853,472 million USD.

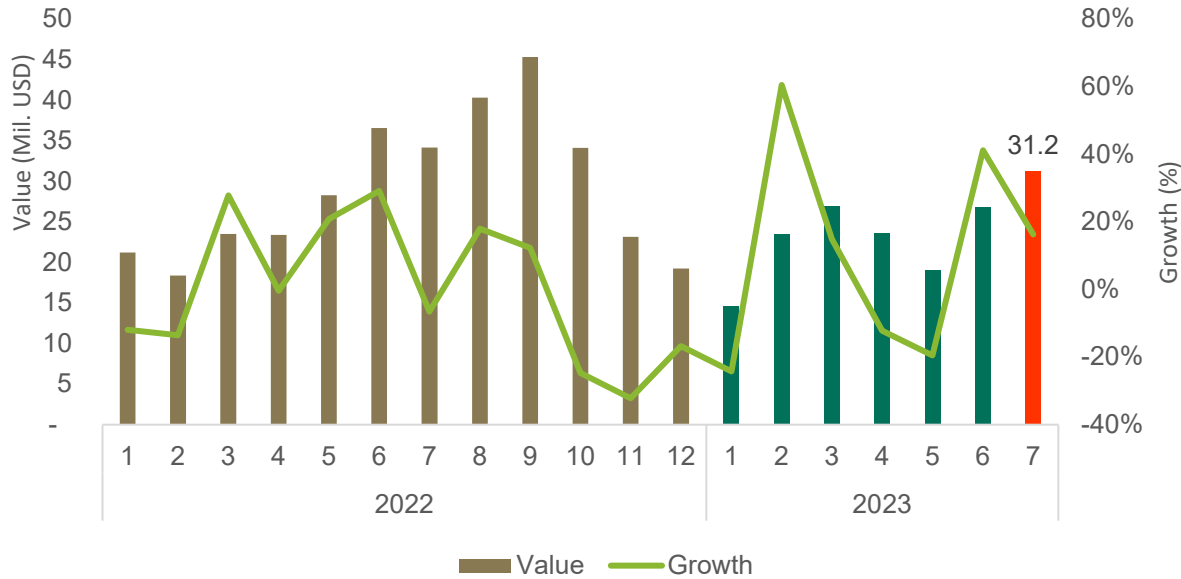
Source: Xinhuanet





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE
31.2
Mil. USD

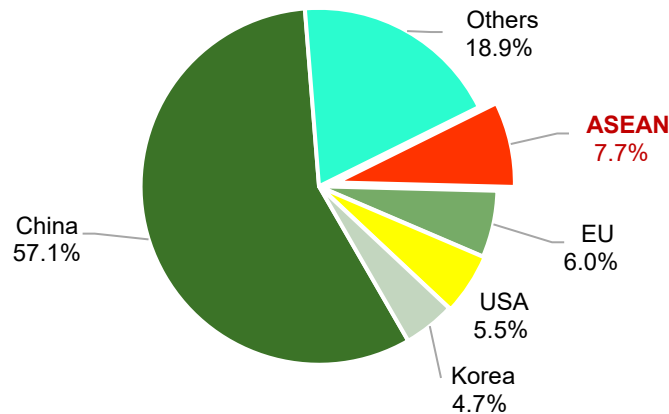
Increase **16.3%** compared to Jun 2023

Decrease **8.6%** compared to Jul 2022

2.3 Mil. USD more than the monthly average rate in 2022

Accumulated seven months of 2023 reaches **165.7 Mil. USD**; **47.7%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



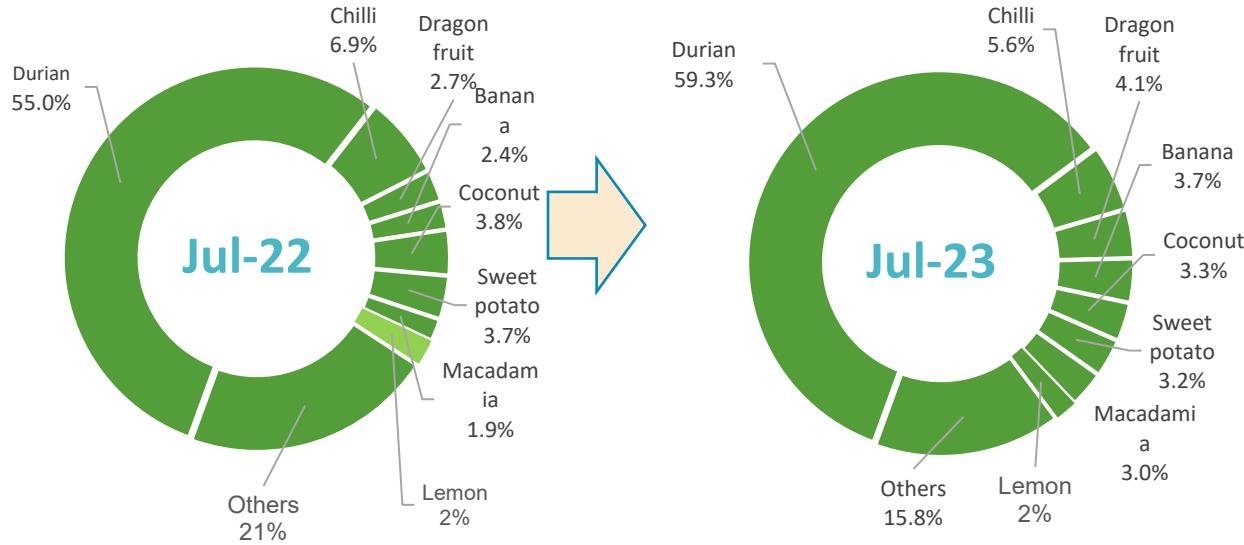
Changes in percentage of export value to the ASEAN, Jul-2023





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023



Durian

Value: **18.5** Mil. USD

Increase **85.3%** compared to Jun 2023

Decrease **1.4%** compared to Jul 2022



Chilli

Value: **1.8** Mil. USD

Decrease **18.7%** compared to Jun 2023

Decrease **26.0%** compared to Jul 2022



Dragon fruit

Value: **1.3** Mil. USD

Increase **1.2%** compared to Jun 2023

Increase **37.9%** compared to Jul 2022



Banana

Value: **1.2** Mil. USD

Increase **17.7%** compared to Jun 2023

Increase **41.8%** compared to Jul 2022



Coconut

Value: **1.0** Mil. USD

Decrease **3.5%** compared to Jun 2023

Decrease **22.4%** compared to Jul 2022



Sweet potato

Value: **1.0** Mil. USD

Increase **2.3%** compared to Jun 2023

Decrease **19.6%** compared to Jul 2022



Macadamia

Value: **0.95** Mil. USD

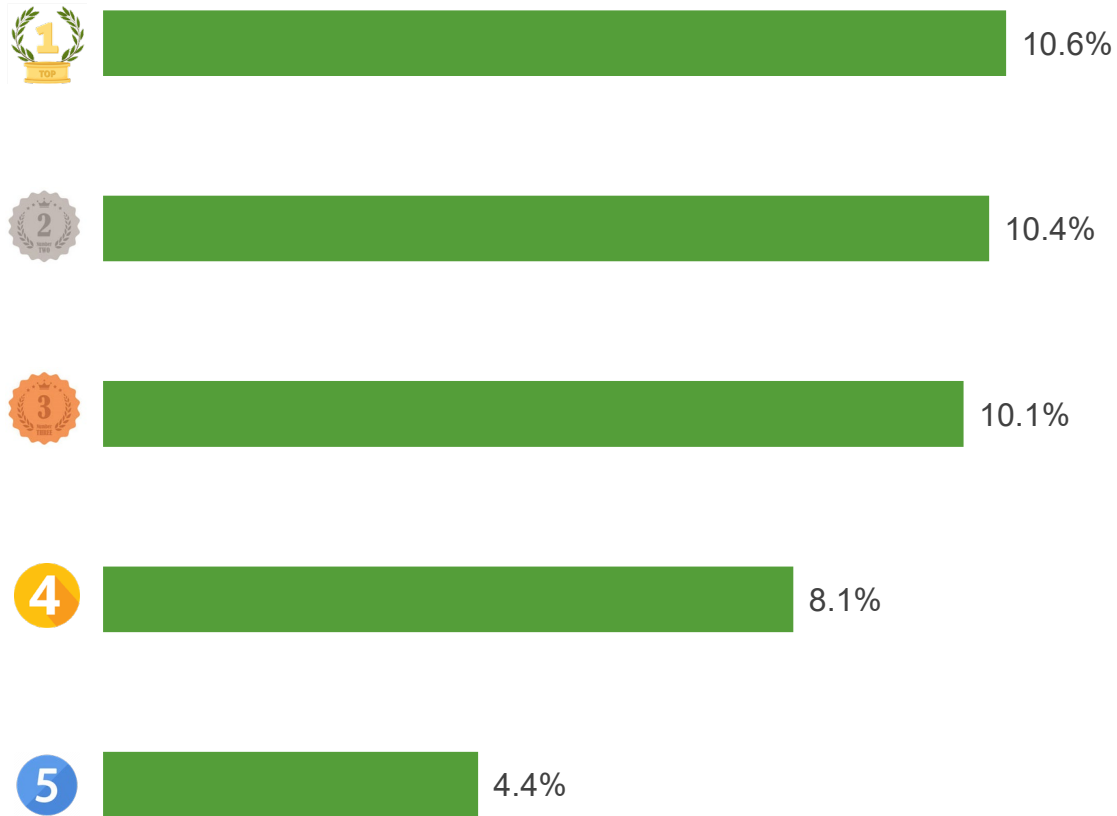
Increase **295.0%** compared to Jun 2023

Increase **48.6%** compared to Jul 2022

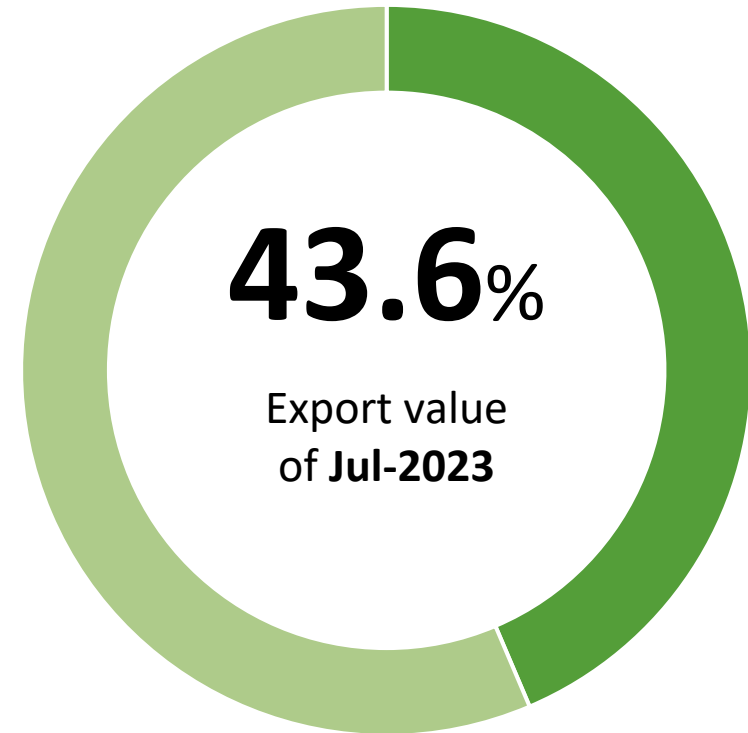


FRUITS AND VEGETABLES (EXPORT)

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



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





FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the ASEAN, Jul-2023



Import results from the ASEAN, Jul-2023

VALUE



19.6

Mil. USD

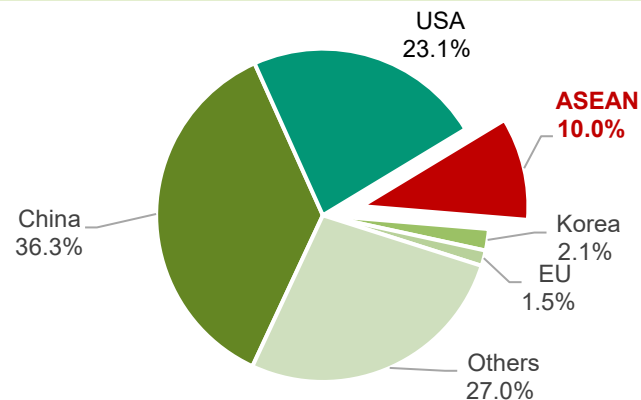
Increase **15.7%** compared to Jun 2023

Decrease **16.9%** compared to Jul 2022

2.7 Mil. USD less than the monthly average rate in 2022

Accumulated seven months of 2023 reaches **136.4 Mil. USD**; **51.0%** of the total 2022

Percentage of import value from the ASEAN, Jul-2023



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

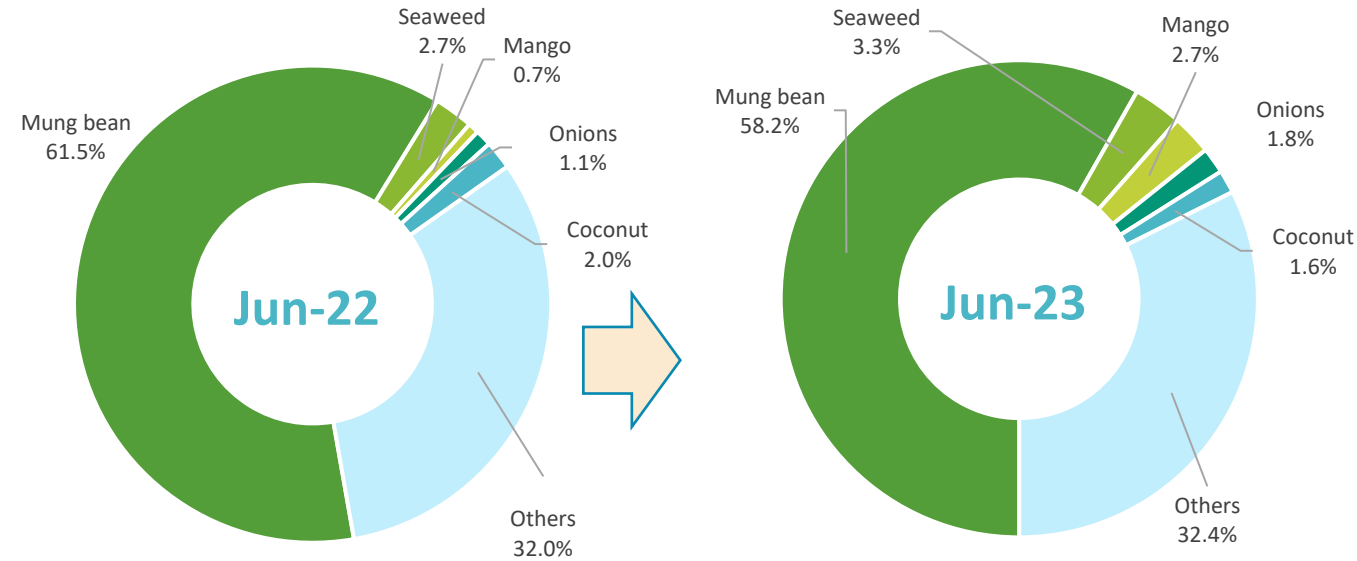




FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Jul-2023

Import results form the ASEAN, Jul-2023



Mung bean

Value: **9.8** Mil. USD

Increase **17.4%** compared to Jun 2023

Decrease **34.4%** compared to Jul 2022



Seaweed

Value: **0.56** Mil. USD

Decrease **7.2%** compared to Jun 2023

Decrease **13.6%** compared to Jul 2022



Mango

Value: **0.46** Mil. USD

Decrease **84.9%** compared to Jun 2023

Increase **156.3%** compared to Jul 2022



Onions

Value: **0.3** Mil. USD

Decrease **21.2%** compared to Jun 2023

Increase **10.9%** compared to Jul 2022



Coconut

Value: **0.27** Mil. USD

Decrease **11.4%** compared to Jun 2023

Decrease **44.2%** compared to Jul 2022

FRUITS AND VEGETABLES

SPOTLIGHT

01

According to a report from the Ministry of Agriculture, Forestry and Fisheries of Cambodia, in the first half of 2023, Cambodia's total fresh banana exports reached 165.6 thousand tons, down 24.4% compared to the same period in 2022. The reason for the decrease is due to the market. Unstable exports and climate change affect product quality.

Source: Freshplaza.com

02

According to Thailand's National Bureau of Food and Agricultural Commodities Standards, Japan has exempted steam heat treatment regulations for mangosteens imported from Thailand. The exemption was approved under the Japan-Thailand Economic Partnership Agreement (JTEPA). The first batch of mangosteen without steam heat treatment will be inspected and certified by Japanese officials in the third week of August. This exemption will help Thai mangosteen exporters reduce costs and help fruit stay fresh longer.

Source: Guojiguoshu.com

03

The Philippine government is urging traders to refrain from hoarding red onions as this could lead to a shortage of fake persimmons, causing the price of the onion to rise even higher. If the workers were not released, the government would be forced to import more to the West to stabilize prices.

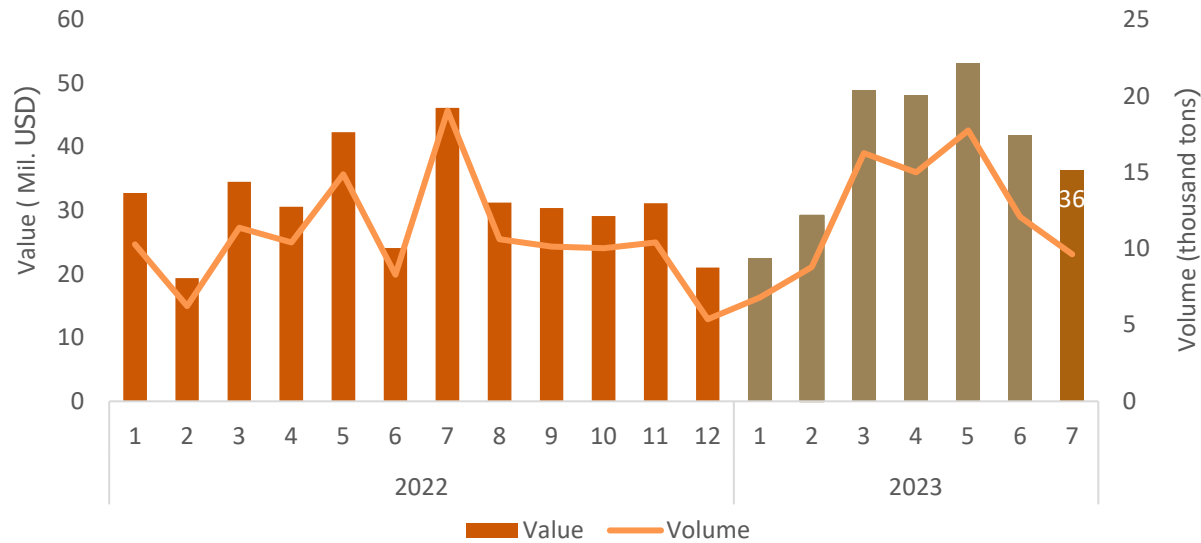
Source: Freshplaza.com





COFFEE

Export volume and value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE
36.4 Mil. USD

▼ Decrease **13%** compared to Jun 2023

▼ Decrease **21.1%** compared to Jul 2022

↑ **5.3** Mil. USD more than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **280** Mil.USD; **75.1%** of the total 2022

VOLUME
9.6 Thousand tons

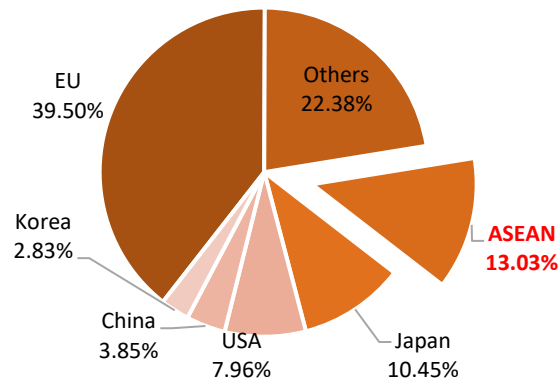
▼ Decrease **20.3%** compared to Jun 2023

▼ Decrease **49.5%** compared to Jul 2022

▼ **1** thousand tons less than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **86.3** thousand tons; **67.9%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



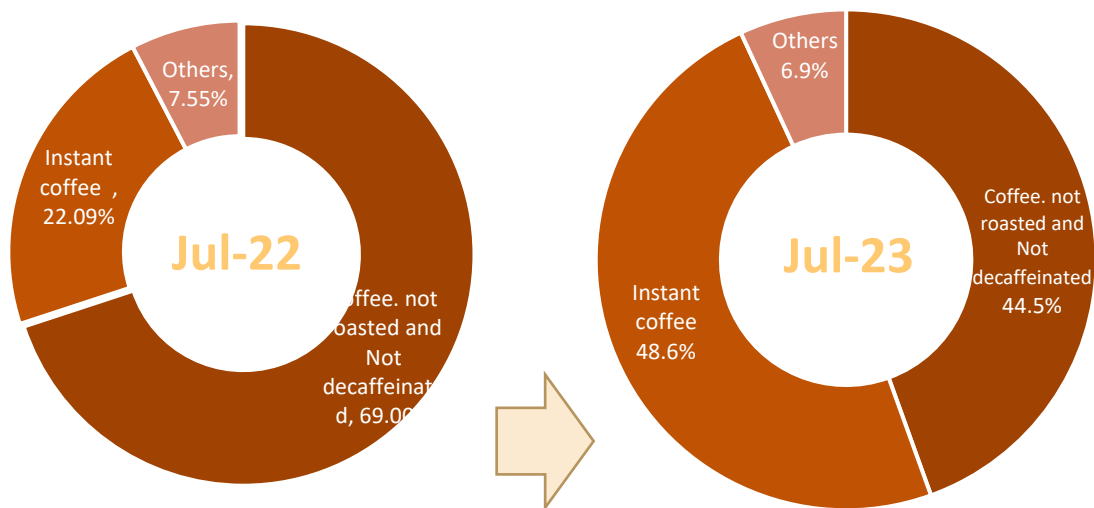
Changes in percentage of export value to the ASEAN, Jul-2023



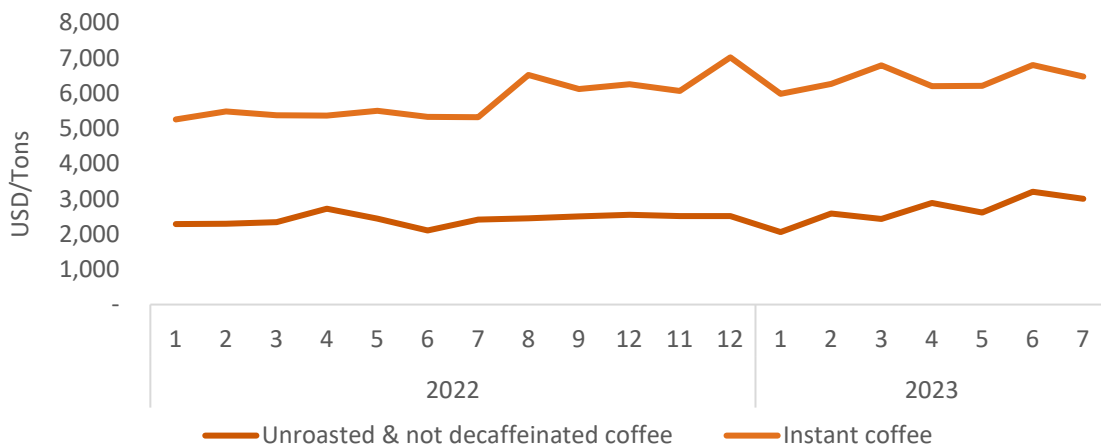


COFFEE

Structure of exports by products to the ASEAN



Average export price to the ASEAN, Jul 2023



Export results to the ASEAN, Jul 2023



Unroasted & not decaffeinated coffee

Value: **15.5** Mil. USD
 Decrease **33%** compared to Jun 2023
 Decrease **51.4%** compared to Jul 2022



Instant coffee

Value: **16.9** Mil. USD
 Increase **22.2%** compared to Jun 2023
 Increase **65.7%** compared to Jul 2022



Roasted and not decaffeinated coffee

value: **1** Mil. USD
 Increase **7.3%** compared to Jun 2023
 Increase **69.9%** compared to Jul 2022

Instant coffee

The average export in Jul-2023 is **6.478** USD/tons; **Decrease 4.8%** compared to the previous month; and **Decrease 6.2%** compared to the same month of 2022.

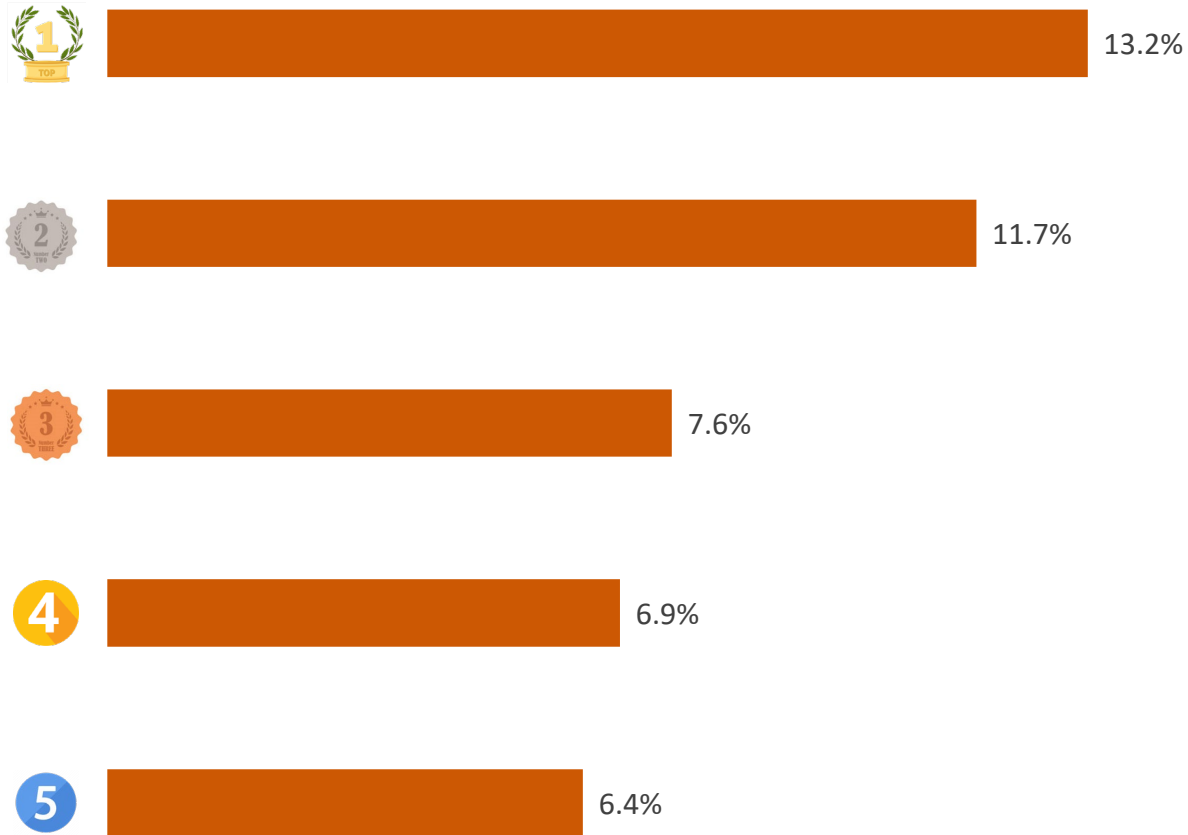
Unroasted & not decaffeinated coffee

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

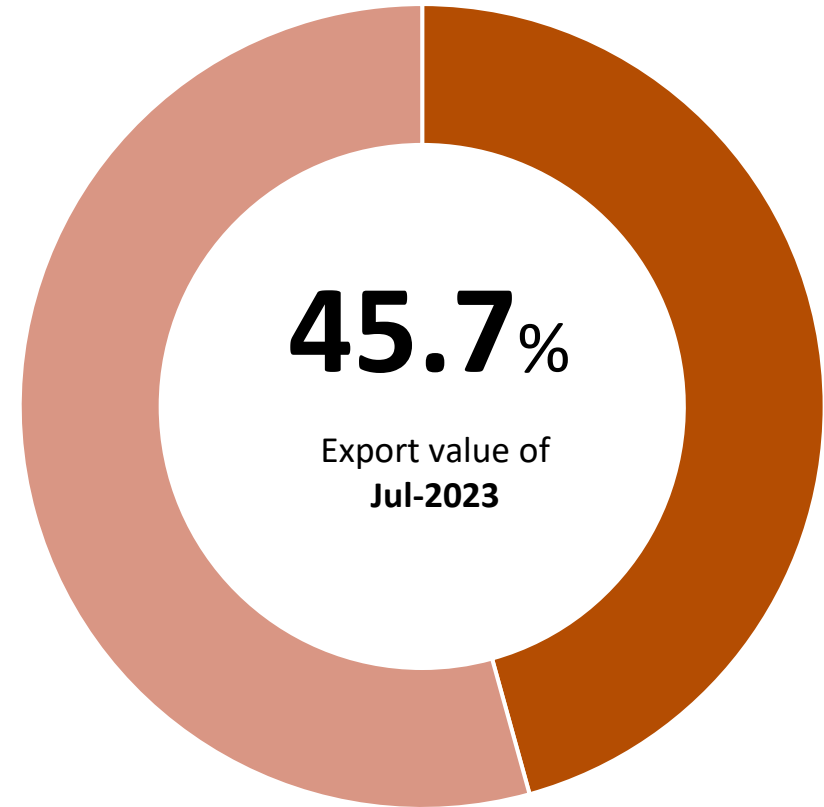


COFFEE

TOP 5 export enterprises by value to the ASEAN, Jul 2023



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



COFFEE



SPOTLIGHT

Indonesian coffee faces El Nino shock.

The Indonesian weather agency (BMKG) said the El Nino phenomenon usually brings prolonged hot and dry weather and has affected more than two-thirds of the country, including Java and parts of Sumatra, which are also two regions—Indonesia's important coffee-producing sector.

In 2023/24, Indonesia's coffee production is forecast at 9.7 million bags (60 kg), down 2.15 million bags from 11.85 million bags a year earlier and the lowest since 2011/12.

Source: Economictimes(8/2023)





CASHEW NUTS

Export volume and value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE

11.2 Mil. USD

- ↗ Increase **5.4%** compared to Jun 2023
- ↗ Increase **69%** compared to Jul 2022
- ↗ Cao hơn **3.4 Mil. USD** the monthly average rate in 2022

Accumulated seven months of 2023 reaches **53.5 mil.USD; 69%** of the total 2022

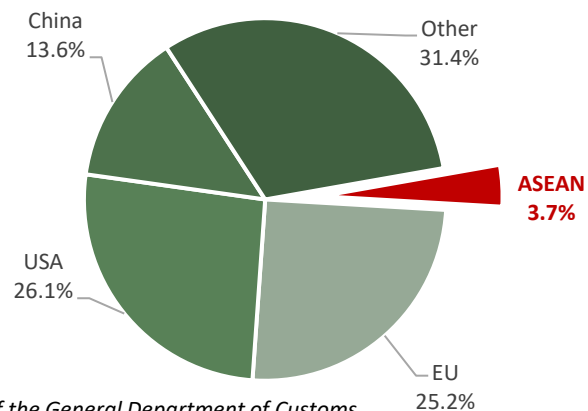
VOLUME

2.4 thousand tons

- ↗ Increase **5.2%** compared to Jun 2023
- ↗ Increase **66%** compared to Jul 2022
- ↗ **873 tons** more than the monthly average rate in 2022

Accumulated seven months of 2023 reaches **17.1 thousand tons; 92%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



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

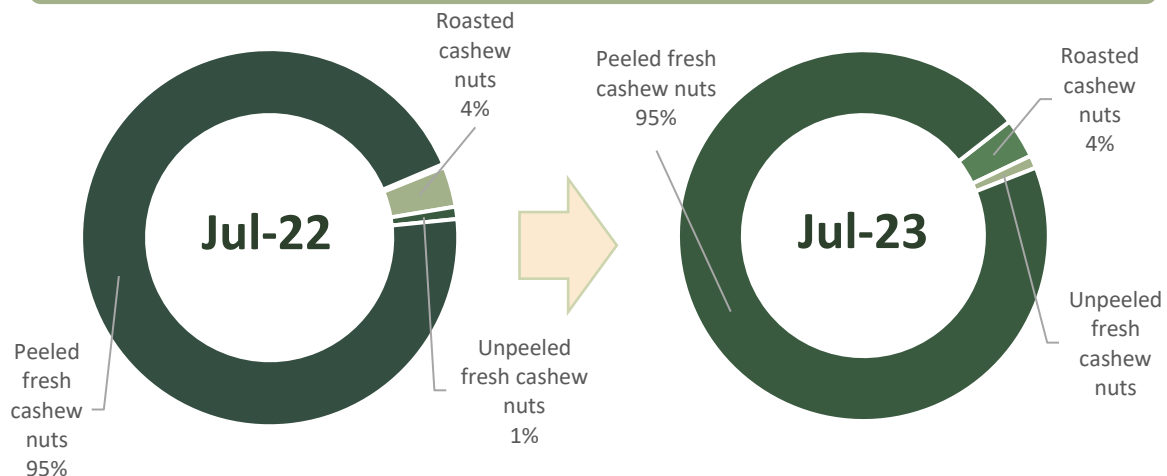


Source: Calculated from data of the General Department of Customs



CASHEW NUTS

Structure of exports by products to the ASEAN, Jul-2023



Average export price to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023



Peeled fresh cashew nuts

Value: **10.7** Mil. USD

Increase **5.1%** compared to Jun 2023

Increase **69.8%** compared to Jul 2022



Roasted cashew nuts

Value: **0.4** Mil. USD

Decrease **4.1%** compared to Jun 2023

Increase **69.6%** compared to Jul 2022

Peeled fresh cashew nuts

The average export in Jul-2023 is **4.669** USD/ton; **Decrease 3.9%** compared to the previous month; and **Decrease 11.3%** compared to the same month of 2022.

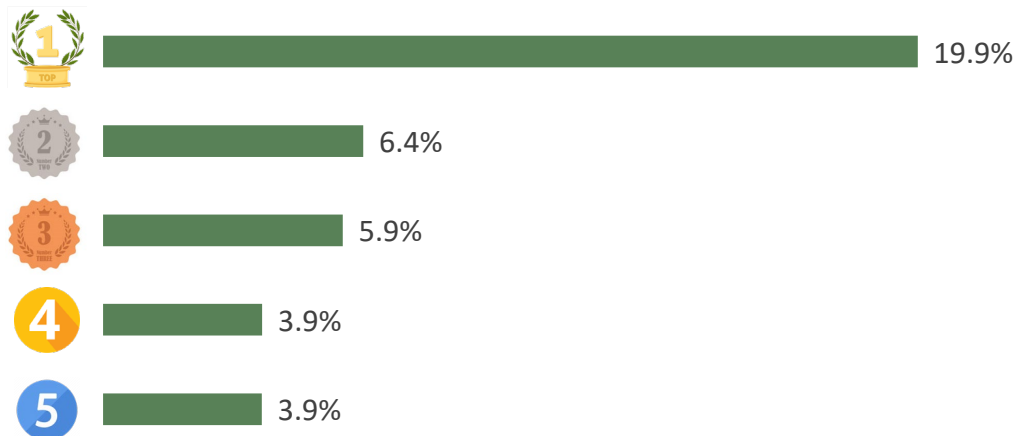
Roasted cashew nuts

The average export in Jul-2023 is **6.086** USD/ton; **Decrease 8%** compared to the previous month; and **Decrease 19.6%** compared to the same month of 2022.

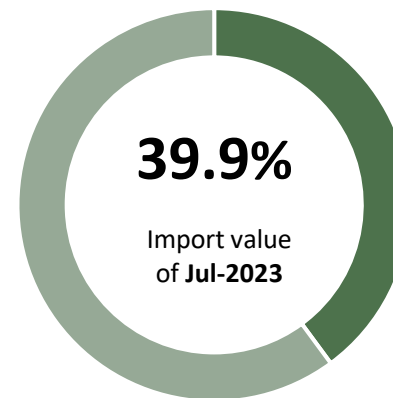


CASHEW NUTS

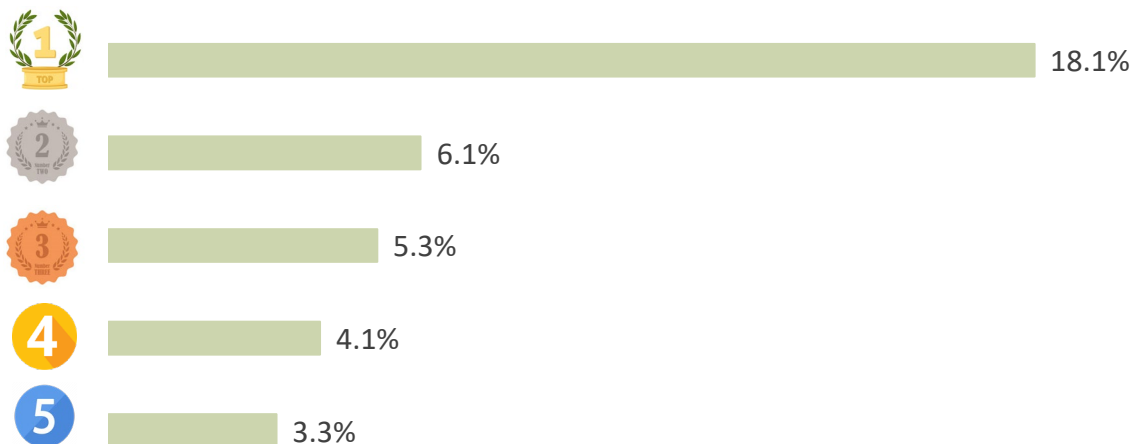
TOP 5 export enterprises by value to the ASEAN , Jul 2023



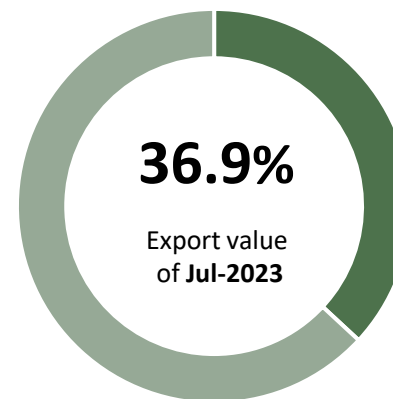
Value ratio of TOP 5 export enterprises to the ASEAN , Jul 2023



TOP 5 export enterprises by volume to the ASEAN , Jul 2023



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



CASHEW NUTS

SPOTLIGHTS

01

According to the president of the Cambodia Cashew Association, more than 90% of Cambodia's raw cashew nuts are exported to neighboring countries for processing into final products. Cambodia currently has about 30 small-scale cashew processing factories and three medium-scale factories in the provinces of Kampong Thom, Kampong Cham, and Preah Vihear. The Cambodian government set a target of building a minimum of 50 moderately regulated grain manufacturers by 2027 to enhance domestic transformation efficiency.

02

From January to July 2023, Vietnam experienced a decline in its import of cashew nuts from Cambodia. The volume of imports decreased by 14.5%, and the value decreased by 23.47% compared to the same period in the previous year. Cambodia supplied a total of 587,160 tons of cashew nuts, generating a turnover of 802.3 million USD. In contrast, Indonesia saw a significant increase in cashew nut imports, with a volume of 3,881 tons and a turnover of 4.7 million USD. This represents a 109.2% increase in volume and a 69.6% increase in value compared to the same period in the previous year.

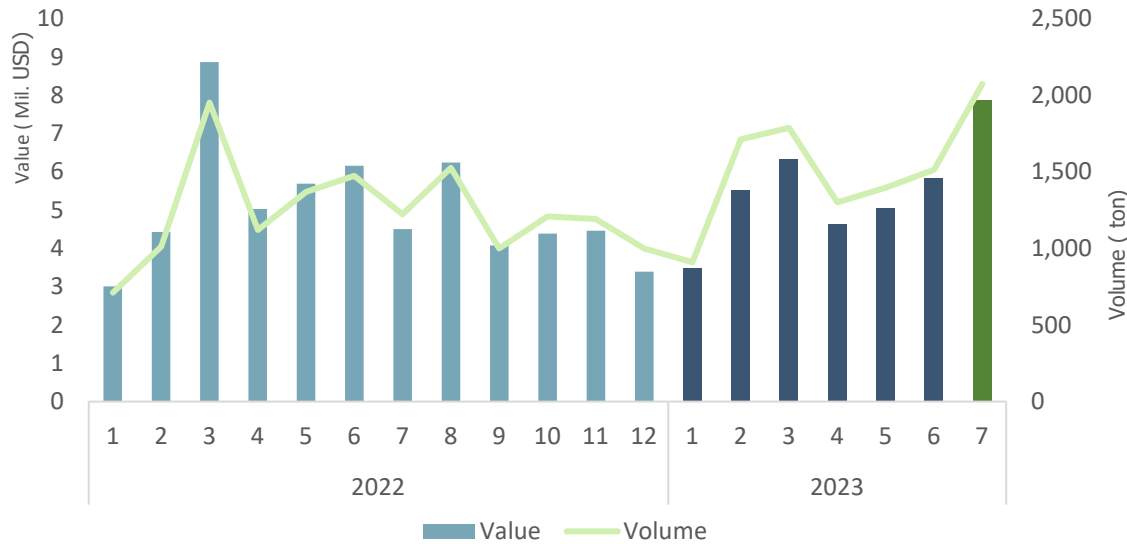
Source: Markettimes (08/2023)





PEPPER

Export value and volume to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE
7.9 Mil. USD

↗ Increase **34.7%** compared to Jun 2023

↗ Increase **74.8%** compared to Jul 2022

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

Accumulated seven months of 2023 reaches **38.9** Mil.USD; **64.3%** of the total 2022

VOLUME
2.1 Thousand tons

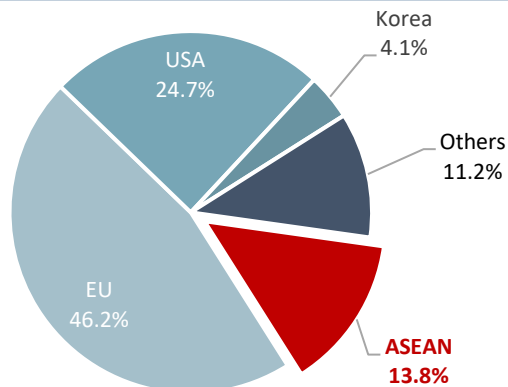
↗ Increase **37%** compared to Jun 2023

↗ Increase **69.5%** compared to Jul 2022

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

Accumulated seven months of 2023 reaches **10.7** thousand tons; **72.3%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



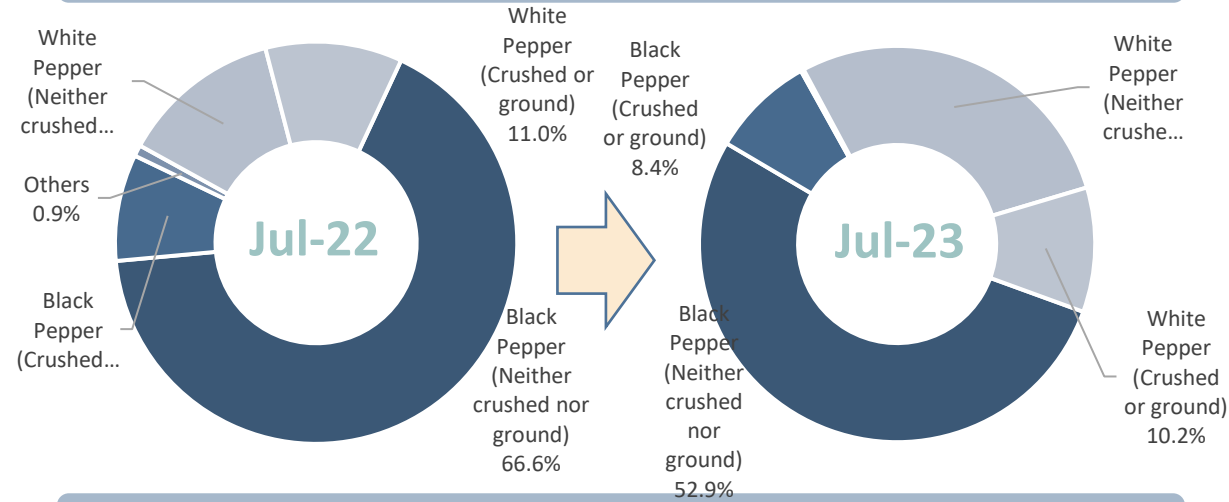
Changes in the percentage of export value to the ASEAN, Jul-2023



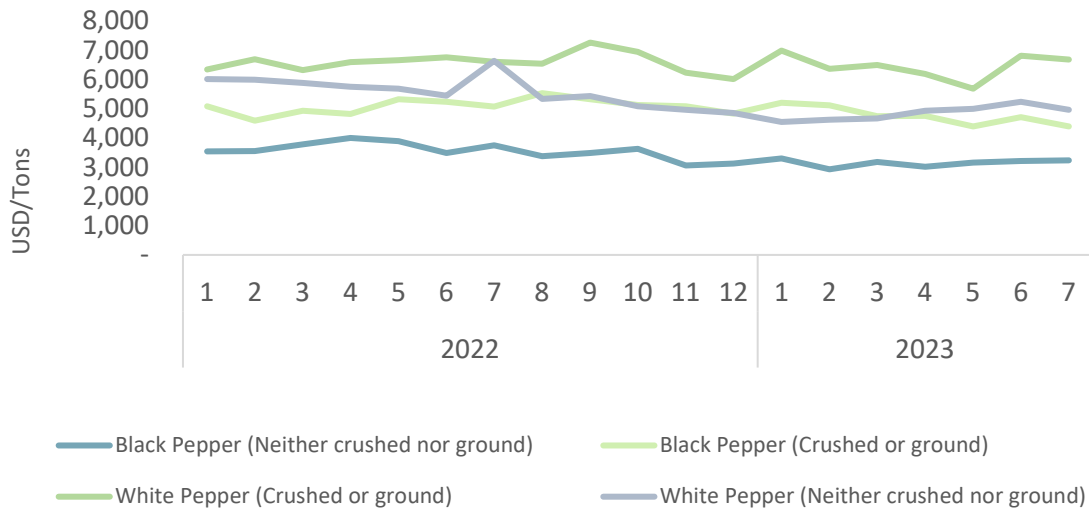


PEPPER

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



Black Pepper (Neither crushed nor ground)

Value : **4.2** Mil. USD

Increase **13.8%** compared to Jun 2023

Increase **38.9%** compared to Jul 2022



White Pepper (Neither crushed nor ground)

Value : **2.2** Mil. USD

Increase **78.7%** compared to Jun 2023

Increase **282%** compared to Jul 2022



White Pepper (Crushed or ground)

Value : **0.8** Mil. USD

Increase **101.4%** compared to Jun 2023

Increase **61.5%** compared to Jul 2022

Black Pepper (Neither crushed nor ground)

The average export in Jul-2023 is **3.233** USD/ton; **Increase 1%** compared to the previous month; and **Decrease 4%** compared to the same month of 2022.

White Pepper (Neither crushed nor ground)

The average export in Jul-2023 is **4.966** USD/ton; **Decrease 5%** compared to the previous month; and **Decrease 25%** compared to the same month of 2022.

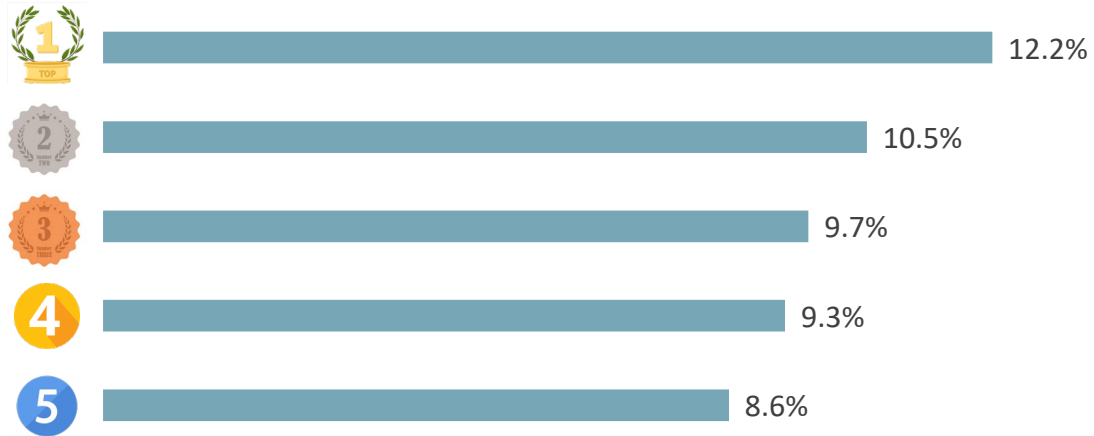
White Pepper (Crushed or ground)

The average export in Jul-2023 is **6.685** USD/ton; **Decrease 2%** compared to the previous month; but **Increase 1%** compared to the same month of 2022.

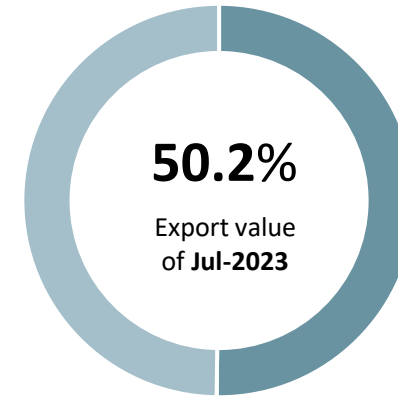


PEPPER

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



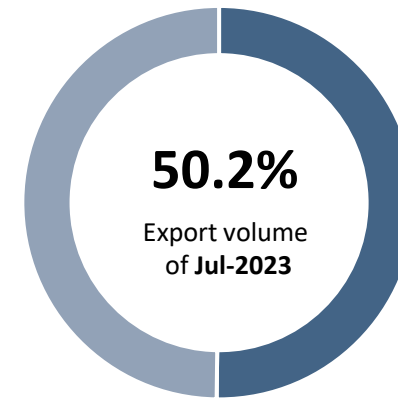
Value ratio TOP 5 export enterprise to the ASEAN, Jul-2023



TOP 5 enterprise by volume to the ASEAN, Jul-2023



Volume ratio TOP 5 enterprise to the ASEAN, Jul-2023



PEPPER



SPOTLIGHTS

01

According to the International Pepper Association (IPC), Indonesia produced 83,000 tons of pepper in 2021, but this figure decreased to 65,000 tons in 2022. Experts predict that the trend will continue in 2023, with projected production dropping to 55,000 tons. This decline is attributed to a lack of interest in pepper trees due to higher coffee prices and a shift towards palm trees. This shift has also impacted the country's export volumes. According to the Indonesian Central Bureau of Statistics (BPS), pepper exports in the first five months of this year only amounted to 10,545 tons, representing a 31.2% decrease compared to the same period last year.

Source: Vietnam Pepper Association (08/2023)

02

According to Cambodia's Ministry of Agriculture, Forestry and Fisheries, in the first half of 2023, this country's pepper exports reached 4,300 tons, a decrease of more than 31% compared to the same period last year. The main reason is the global economic recession leading to a reduction in orders for goods, including pepper. Market uncertainty and climate change have affected crop productivity and quality. In addition, illegal exports through corridors of Vietnam and Thailand are other factors contributing to the impact on the market.

Source: vietnambiz (08/2023)





RUBBER

Export volume and value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE

3.6 *Mil. USD*

↗ Increase **33.2%** compared to Jun 2023

↘ Decrease **41.6%** compared to Jul 2022

↓ **0.7 Mil. USD** less than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **18 Mil.USD**; **35.5%** of the total 2022

VOLUME

2.3 *thousand tons*

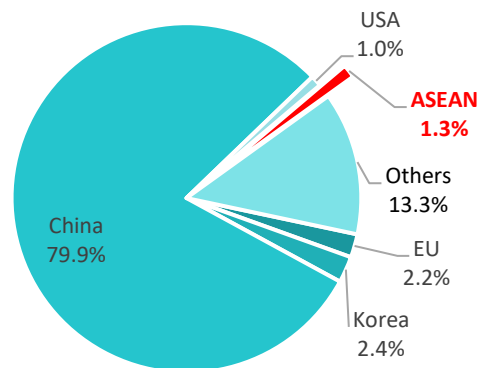
↗ Increase **36%** compared to Jun 2023

↘ Decrease **32.4%** compared to Jul 2022

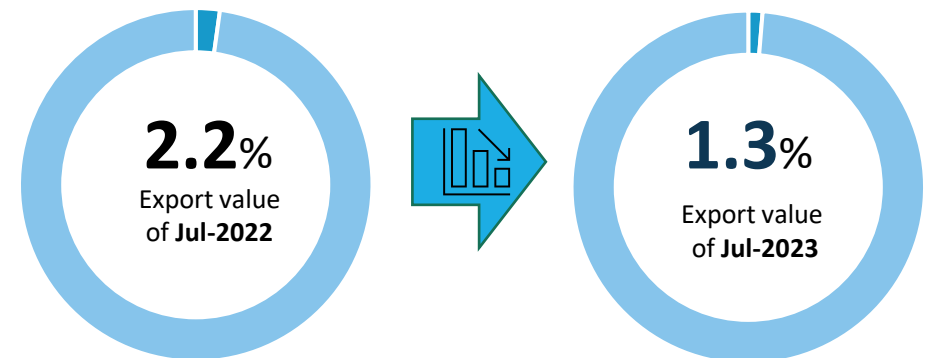
↓ **0.1 thousand tons** less than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **11 thousand tons**; **39%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



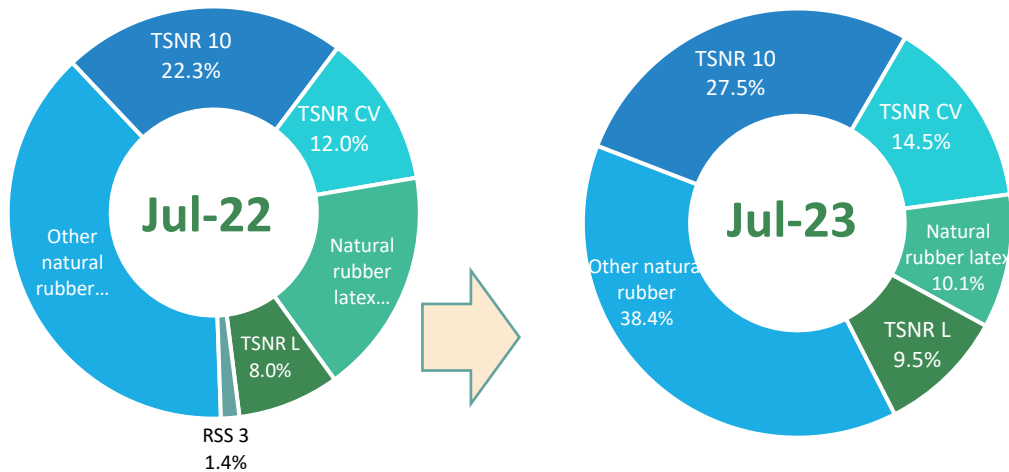
Changes in the percentage of export value to the ASEAN, Jul-2023



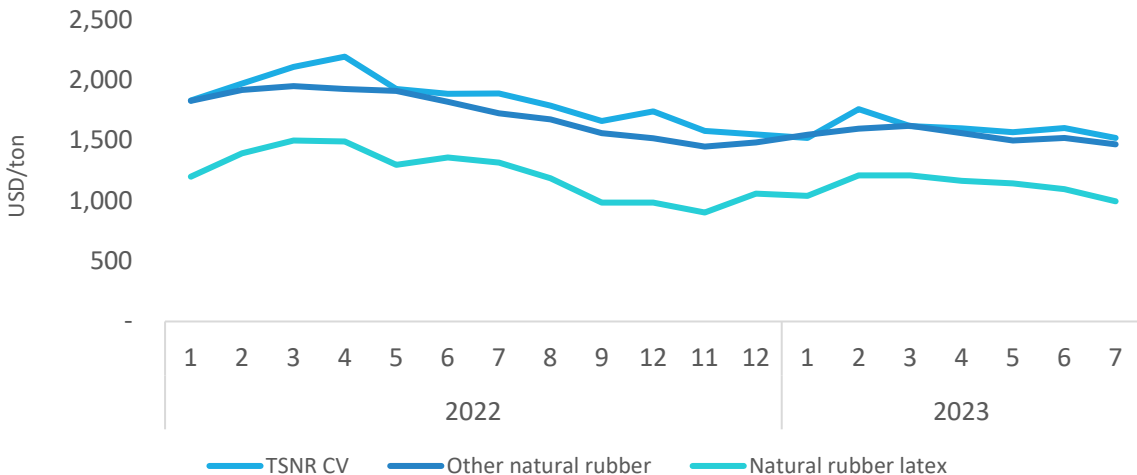


RUBBER

Structure of exports by products to the ASEAN, Jul-2023



Average export price to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023



Other natural rubber

Value: **0.95** Mil. USD

Decrease **26.6%** compared to Jun 2023

Decrease **50.1%** compared to Jul 2022

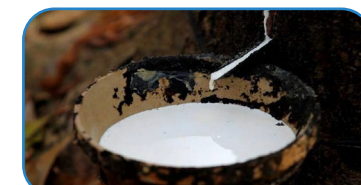


TSNR CV

Value: **0.36** Mil. USD

Decrease **0.7%** compared to Jun 2023

Decrease **40%** compared to Jul 2022



Natural rubber latex

Value: **0.25** Mil. USD

Increase **202%** compared to Jun 2023

Decrease **71.5%** compared to Jul 2022

Other natural rubber

The average export in Jul-2023 is **1.467** USD/ton; **Decrease 3.6%** compared to the previous month; and **Decrease 15.0%** compared to the same month of 2022.

TSNR CV

The average export in Jul-2023 is **1.520** USD/ton; **Decrease 5.2%** compared to the previous month; and **Decrease 19.6%** compared to the same month of 2022.

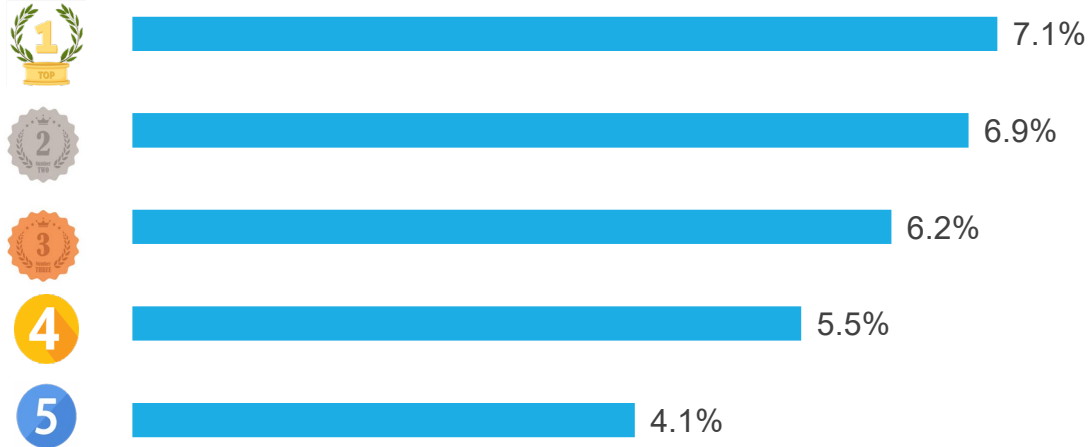
Natural rubber latex

The average export in Jul-2023 is **995** USD/ton; **Decrease 9.3%** compared to the previous month; and **Decrease 24.4%** compared to the same month of 2022.

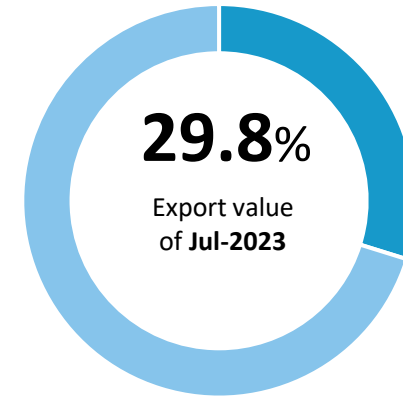


RUBBER

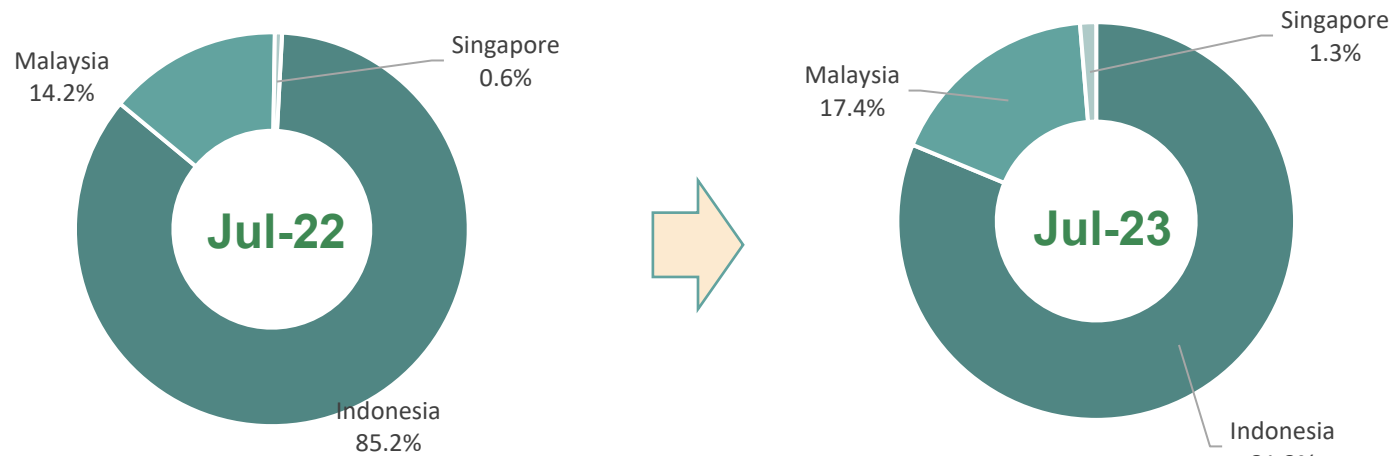
TOP 5 export enterprises by value to the ASEAN, Jun-2023



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 Statistics Departments of Malaysia have reported that in June 2023, the country's natural rubber exports decreased by 16.7% compared to the same period in 2022, totaling 48,857 tons. However, there was an increase of 31.8% from the previous month. China remained the largest export market with 50.6%, followed by Germany (7.8%), the United States (4.9%), Pakistan (3.1%), and Iran (2.5%). The natural rubber output in Malaysia for the second quarter of 2023 decreased by 7.6% compared to the first quarter of 2023, reaching 77,453 tons. Despite this decline, there was still a 3.8% increase compared to the same period in 2022.

Source: Department of Statistics Malaysia

❖ Indonesia's natural rubber exports in the first 7 months of 2023 reached a total of 1,081 million tons, down 17% compared to the same period in 2022. Of which, standard rubber exports reached 1,053 million tons, down 17%; Smoked rubber sheet exports reached 24,000 tons, down 19%, and rubber latex exports reached 2,500 tons, up 75%.

Source: tanhei.com

❖ Indonesia's natural rubber exports in the first seven months of 2023 reached a total of 1,081 million tons, down 17% compared to the same period in 2022. Of which, standard rubber exports reached 1,053 million tons, down 17%; Smoked rubber sheet exports reached 24,000 tons, down 19%, and rubber latex exports reached 2,500 tons, up 75%.

Source: tanhei.com

❖ Cambodia exported 170,968 tons of rubber in the first seven months of 2023, an increase of 3% over the same period last year. Cambodia's main export markets are Malaysia, Vietnam, Singapore and China. Cambodia has 404,578 hectares of rubber plantations, of which 315,332 hectares (78%) are harvestable.

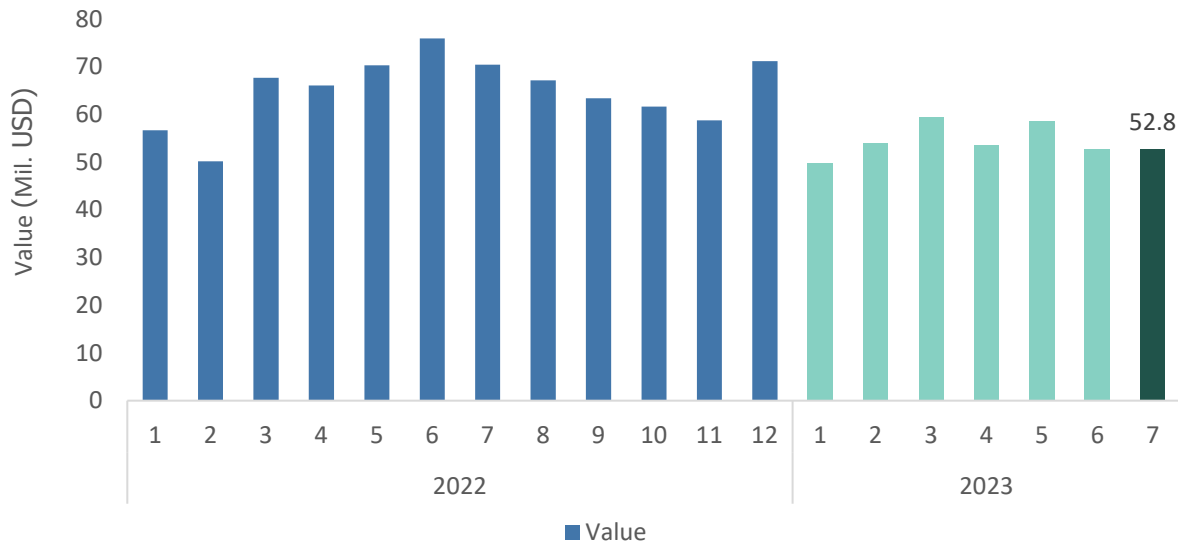
Source: General Department of Rubber of Cambodia





SEAFOOD

Export value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023

VALUE



52.8 Mil. USD

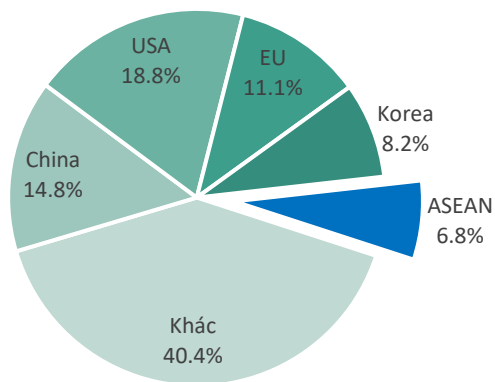
↗ Increase **0.2%** compared to Jun 2023

↘ Decrease **25.1%** compared to Jul 2022

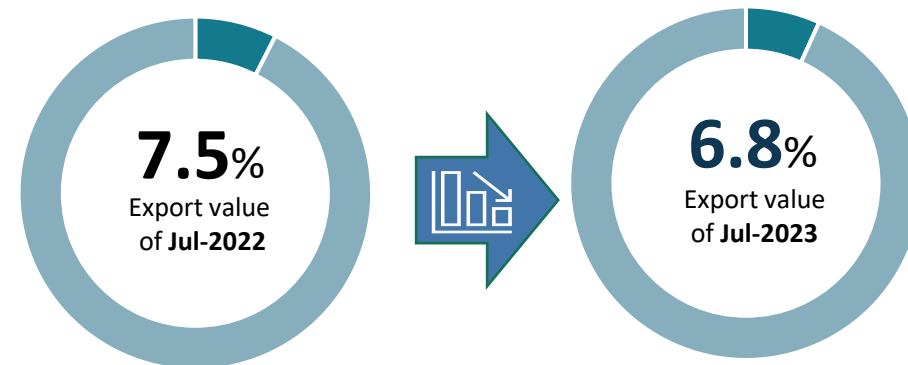
↘ **12.2 Mil. USD** less than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **380.7** Mil.USD; **48.8%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



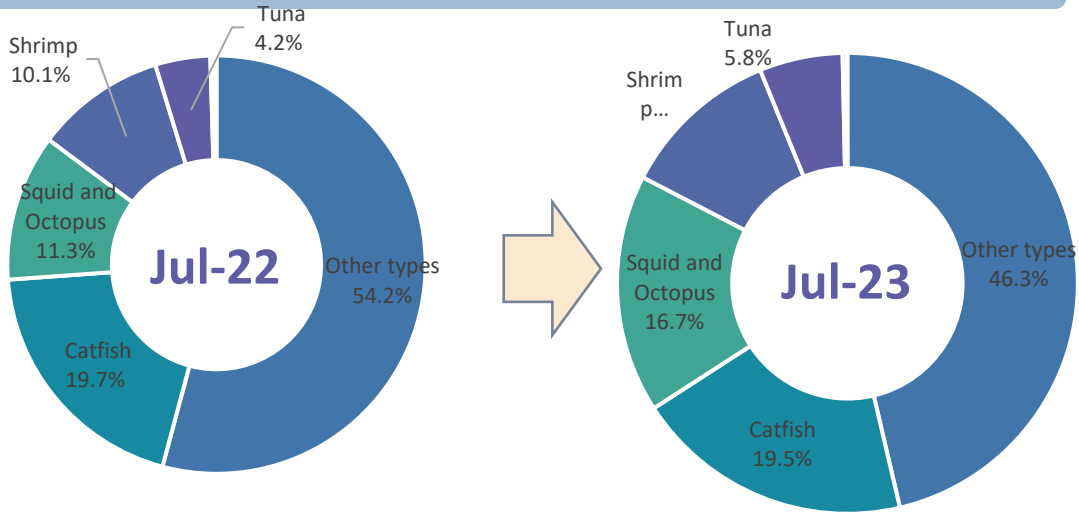
Change in percentage of export to the ASEAN, Jul-2023



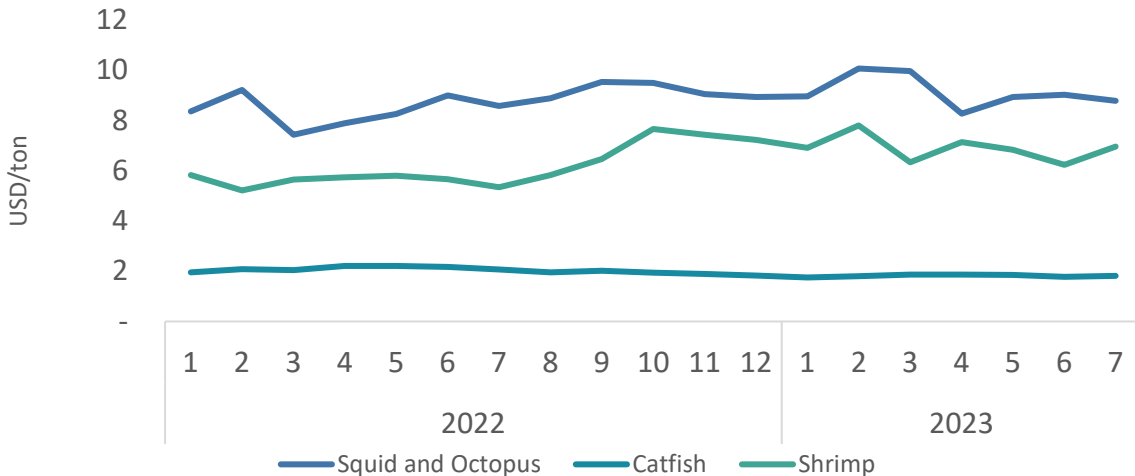


SEAFOOD

Structure of export by product to the ASEAN, Jul-2023



Average export price to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023



Catfish

Value: **10.2** Mil. USD
 Increase **1.3%** compared to Jun 2023
 Decrease **26.4%** compared to Jul 2022



Squid and Octopus

Value: **8.7** Mil. USD
 Increase **7.7%** compared to Jun 2023
 Increase **9.5%** compared to Jul 2022



Shrimp

Value: **5.8** Mil. USD
 Increase **26.7%** compared to Jun 2023
 Decrease **17.5%** compared to Jul 2022

Squid and Octopus

The average export in Jul-2023 is **8.8** USD/kg; **Decrease 2.8%** compared to the previous month; but **Increase 2.3%** compared to the same month of 2022.

Catfish

The average export in Jul-2023 is **1.8** USD/kg; **Increase 1.9%** compared to the previous month; but **Decrease 12.4%** compared to the same month of 2022.

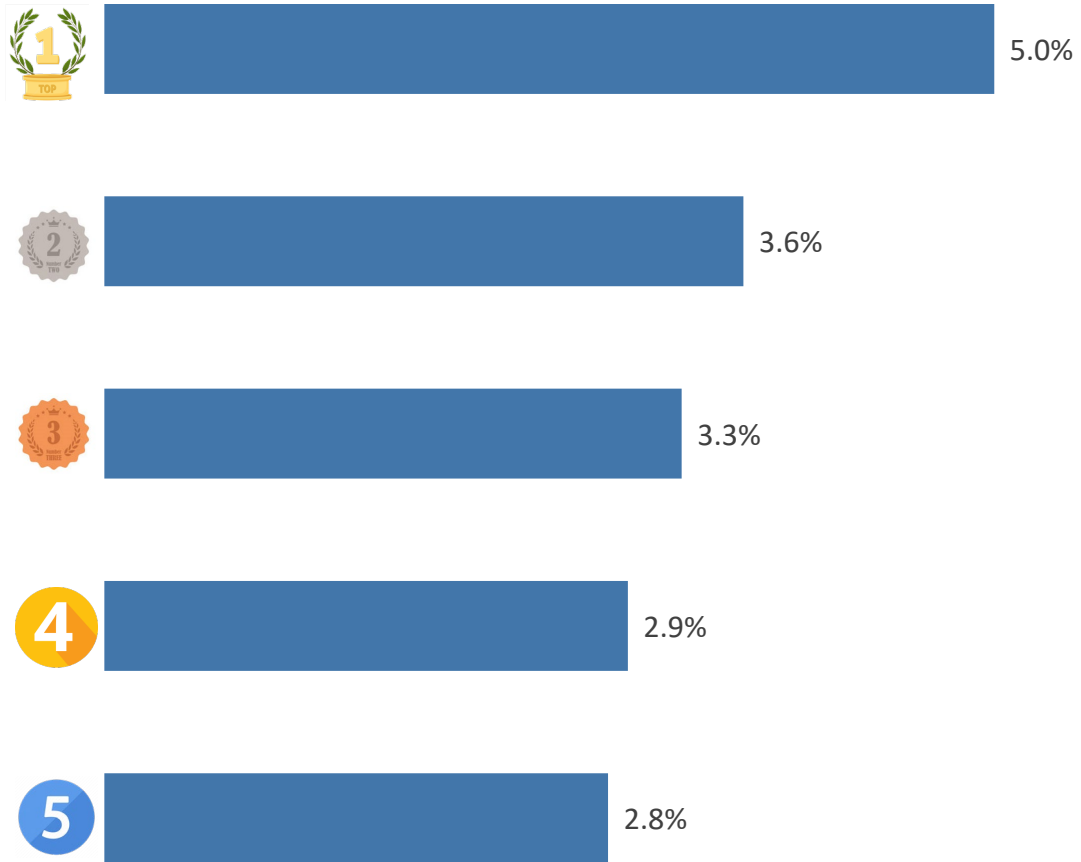
Shrimp

The average export in Jul-2023 is **7.0** USD/kg; **Increase 11.6%** compared to the previous month; and **Increase 30.2%** compared to the same month of 2022.

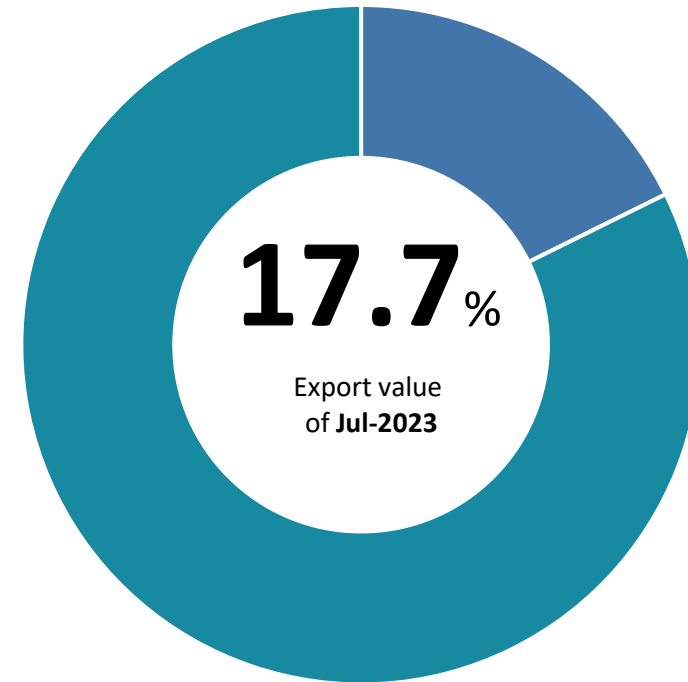


SEAFOOD

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



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



01 **Thai Union announces a \$200 million sustainability initiative.**

Thai Union, the company, arranged a 6.9 billion THB (200 million USD) investment account with the SeaChange 2030 sustainable architecture, ensuring that by 2030, 100% of the company's seafood comes from responsible sources. SeaChange 2030 is set to expand Thai Union's snail fish sustainability efforts to other wild-caught species, such as mackerel, herring, salmon, blue crab, and shrimp. Currently, 88% of the company's fish come from responsible sources.

Source: Vasep (8/2023)

02 **Indonesia's white-leg shrimp exports decreased in the first half of this year**

The export value to Indonesia's main market, the United States, decreased by 41% in the first five months of the year. Indonesia's total shrimp export output in the first two quarters of this year reached 87,638 tons, down 19% over the same period in 2022 and the lowest volume since 2019.

Source: Vasep(8/2023)

03 **Indonesia calls on Singapore to cooperate more closely in combating smuggling of lobster larvae**

Indonesia calls on Singapore to commit to closing its borders to illegal exports of lobster larvae. Indonesia has banned the export of wild-caught lobster larvae from 2021, but Singapore still allows imports. The most recent case was reported in early July when customs officers in Batam seized a shipment of nearly 50,000 lobster larvae being transported to Singapore. The illegal export of larvae and baby lobsters causes the country to lose billions of rupiah in revenue and threatens the dwindling number of wild lobsters.

Source: Mongabay (8/2023)





MEAT & MEAT PRODUCTS (EXPORT)

Export value to the ASEAN, Jul-2023



Export results to the ASEAN, Jul-2023



VALUE

↘ Decrease **48.1%** compared to Jun 2023

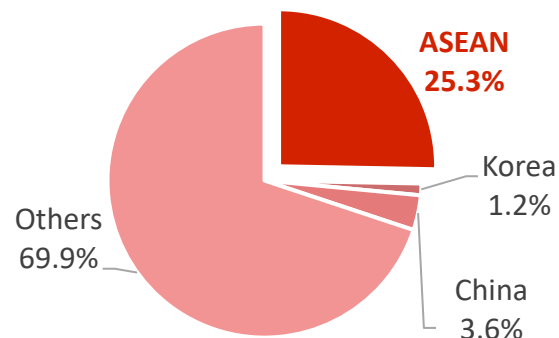
↗ Increase **61.1%** compared to Jul 2022

↑ **1.6 Tr.USD** more than the monthly average rate in 2022

3.5
Mil. USD

◇ Accumulated seven months of 2023 reaches **21.7 mil. USD; 95%** of the total 2022

Percentage of export value to the ASEAN, Jul-2023



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





MEAT & MEAT PRODUCTS (EXPORT)

Import value from the ASEAN, Jul-2023



Import results from the ASEAN, Jul-2023

VALUE



1.53
Mil. USD

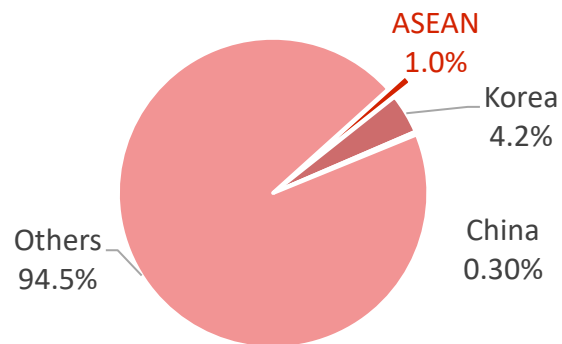
↗ Increase **47.1%** compared to Jun 2023

↘ Decrease **91.6%** compared to Jul 2022

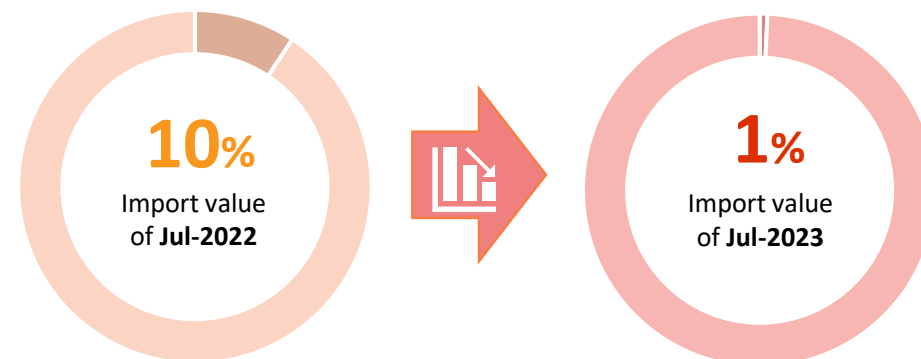
↓ **10.3 Mil. USD** less than the monthly average rate in 2022

◇ Accumulated seven months of 2023 reaches **7.8 Mil. USD; 5.5%** of the total 2022

Percentage of import from the ASEAN, Jul-2023



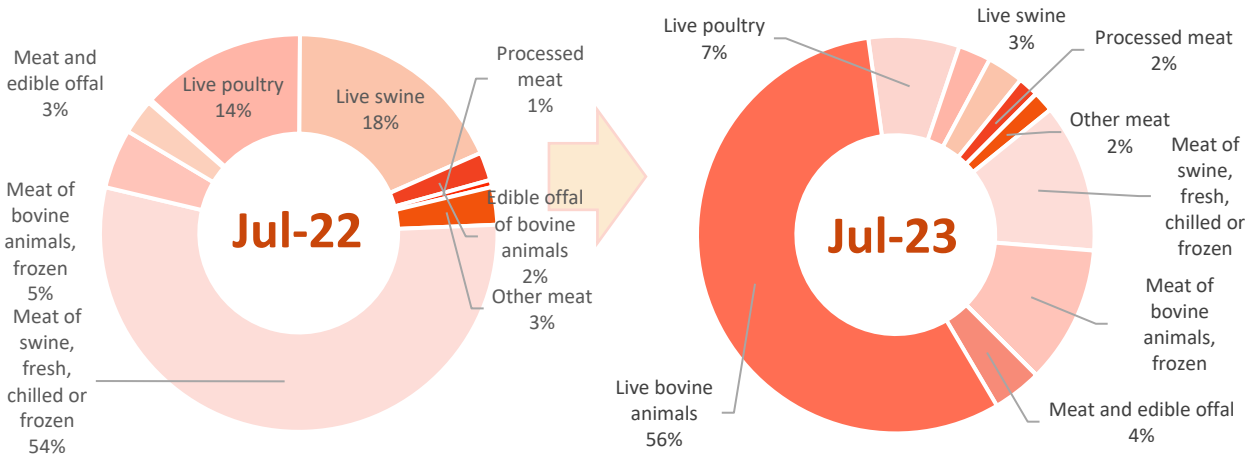
Changes in the percentage of import value from the ASEAN, Jul-2023





MEAT & MEAT PRODUCTS

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



Import results to the ASEAN, Jun-2023



Live bovine animals

Value: **1.99** Mil. USD

Decrease **68.7%** compared to Jun 2023



Meat of bovine animals, frozen

Value: **397** thousand USD

Increase **16 times** compared to Jun 2023

Increase **273%** compared to Jul 2022



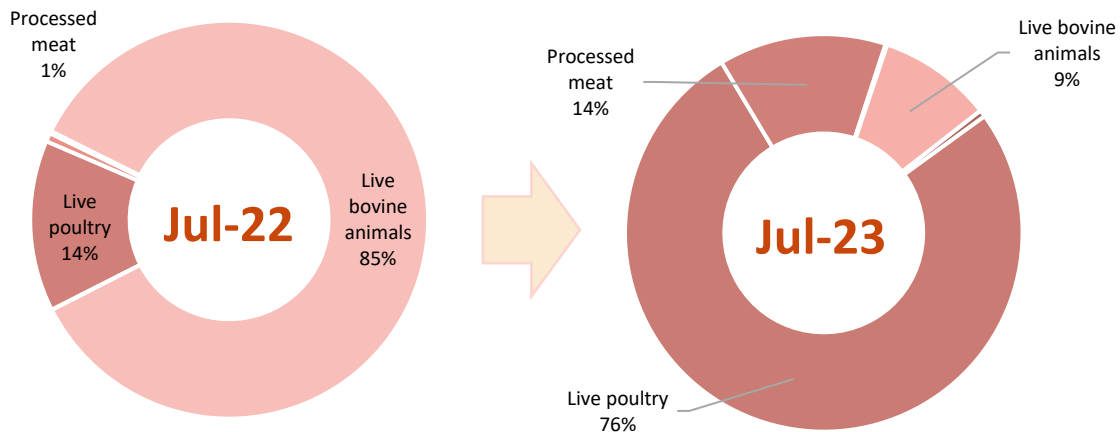
Meat of swine, fresh, chilled or frozen

Value: **429** thousand USD

Increase **438%** compared to Jun 2023

Decrease **64%** compared to Jul 2022

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



Export results the ASEAN, Jun-2023



Live poultry

Value: **1.2** Mil. USD

Increase **231%** compared to Jun 2023

Decrease **54%** compared to Jul 2022



Processed meat

Value: **209** thousand USD

Decrease **37.7%** compared to Jun 2023

Increase **63.8%** compared to Jul 2022

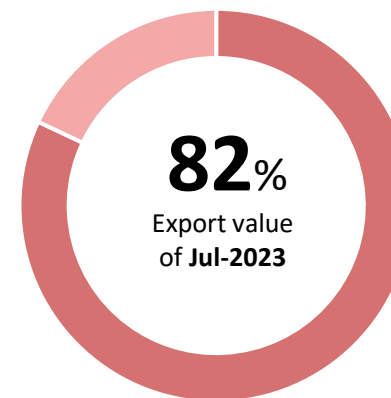


MEAT & MEAT PRODUCTS

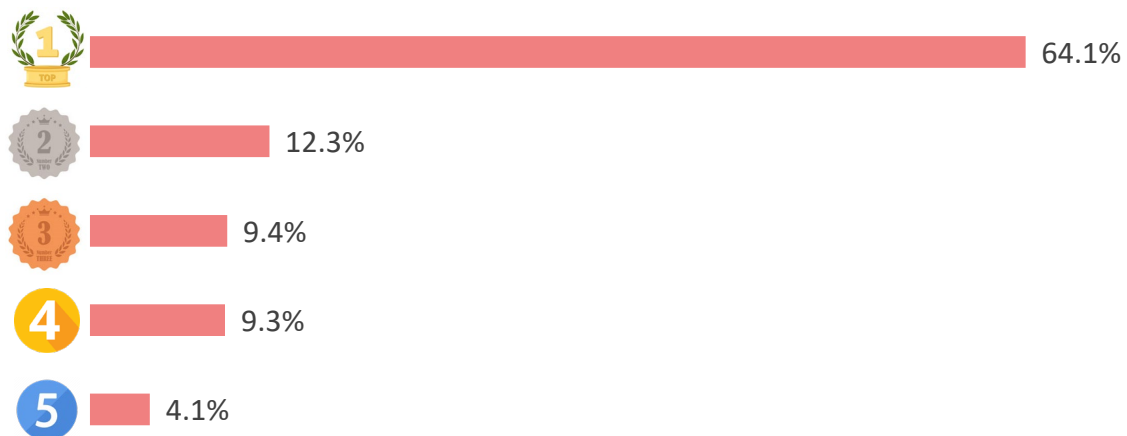
TOP 5 export enterprises by value to the ASEAN , Jul 2023



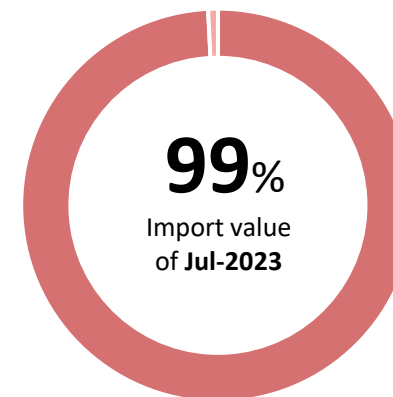
Value ratio of TOP 5 export enterprises to the ASEAN , Jul 2023



TOP 5 import enterprises by value to the ASEAN , Jul 2023



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





MEAT & MEAT PRODUCTS

SPOTLIGHTS

01

Cambodian beef farmers are concerned about falling prices and smuggling

During the past month, beef farmers in Cambodia have continuously complained about falling cow prices and the lack of traders buying cows. According to the Chairman of the Cambodian Livestock Association (CLRA), the decrease in Cambodian beef prices may be due to the impact of illegal imports of frozen meat (including beef, pork, chicken, duck meat, and animal organs). animals) from neighboring countries.

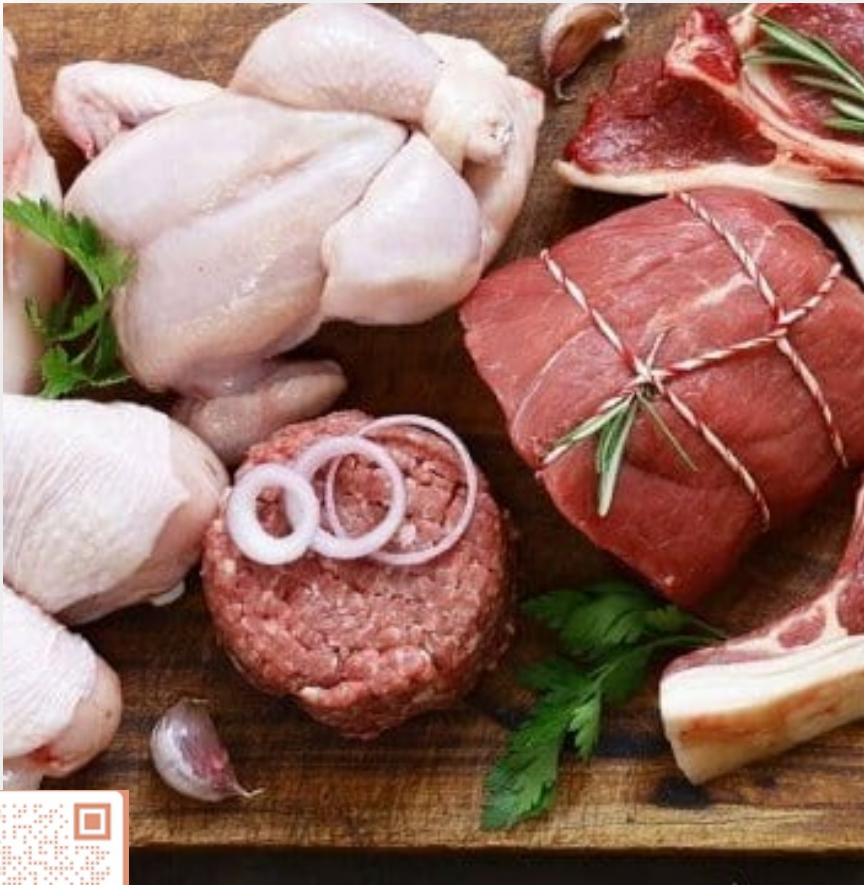
Source: Thesta (8/2023)

02

Cambodia plans to export pork to Vietnam

According to the president of the Cambodian Pig Breeding Association (CLRA), Cambodia is considering exporting pigs to Vietnam to solve the pork surplus situation. The Cambodian Ministry of Agriculture, Forestry, and Fisheries will support providing export documents after the two sides agree on the price.

Source: Cambodian (8/2023)



COMMENTS AND REVIEW

RICE

The Vietnam Food Association predicts that the demand for Vietnamese rice will rise by over 1 million tons in 2023, compared to the yearly average. This means that the market outlook is favorable for the rest of the year. The Vietnam Commodity News Center reports that global rice prices are expected to remain high due to the current supply situation.



PEPPER

The Cambodian Pepper and Spice Federation (CPSF) reports that the decrease in pepper exports is due to a drop in pepper prices in the market. Despite this, pepper output remains steady. As a result, some farmers have decided to temporarily halt sales and dry their pepper until prices improve. Unfavorable weather conditions have also caused some farmers to abandon planting, which may result in a decrease in pepper production in the upcoming year.



SEAFOOD

VASEP forecasts that in 2023, Vietnam's seafood exports to some ASEAN markets, such as Thailand, will decrease by 11-23% compared to 2022. This market has shown more positive signs as it has increased compared to the previous year. Last month, on the export value of key products such as shrimp, pangasius, squid, and octopus.





Any comments, please send to:

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