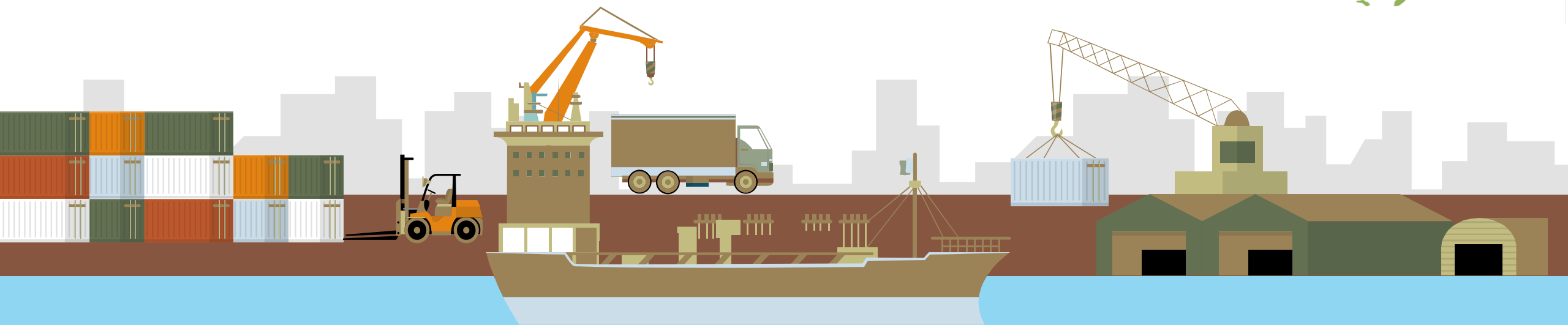


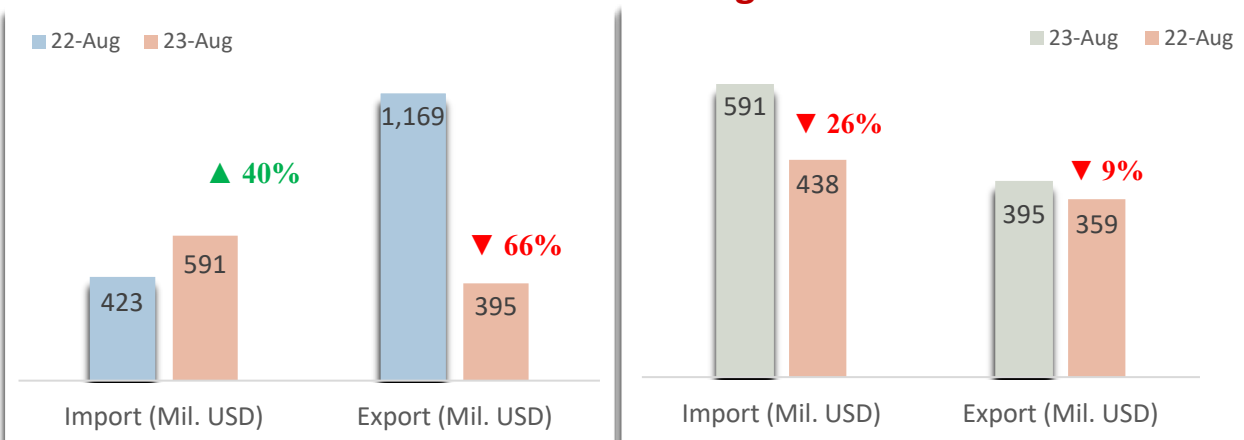
MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **ASEAN MARKET**

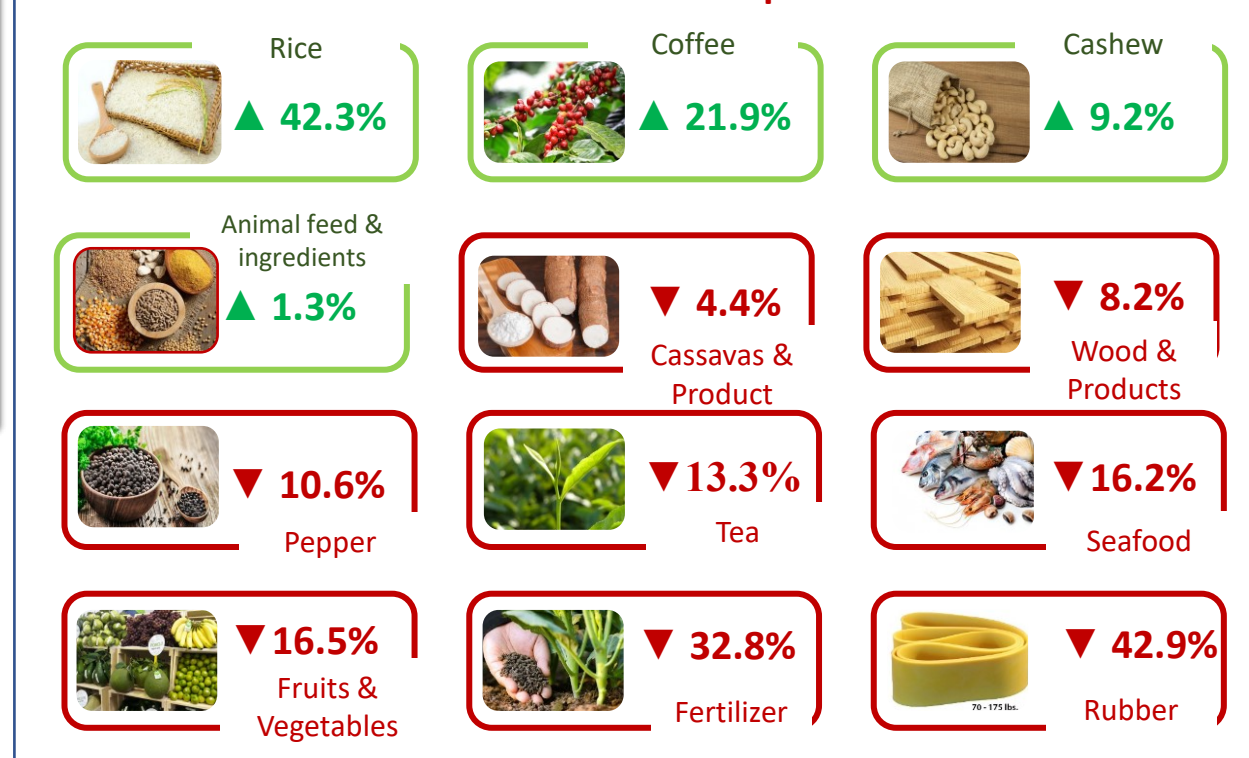


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN AUGUST 2023

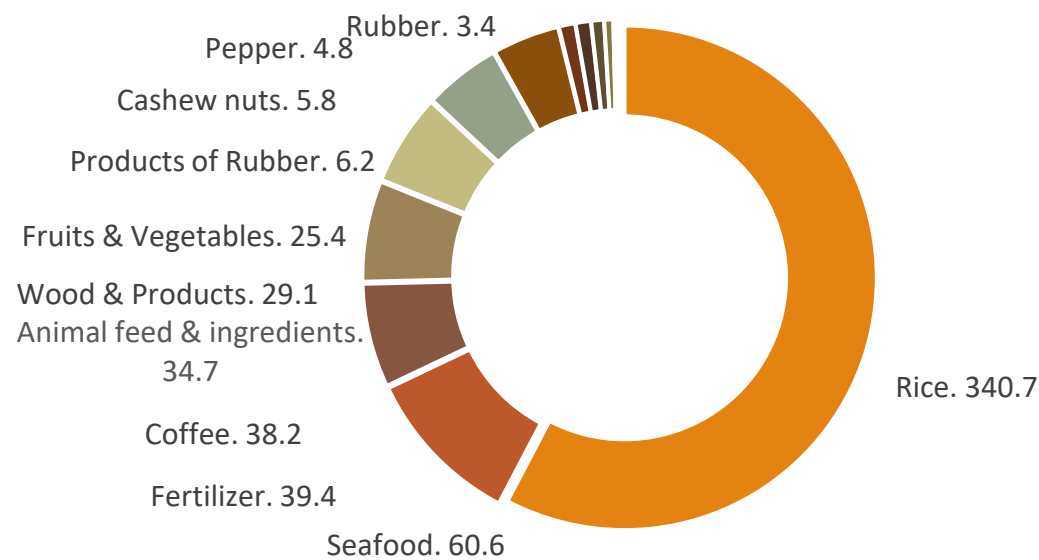
AFF product Import- Export turnover between Vietnam – ASEAN. Aug-2023



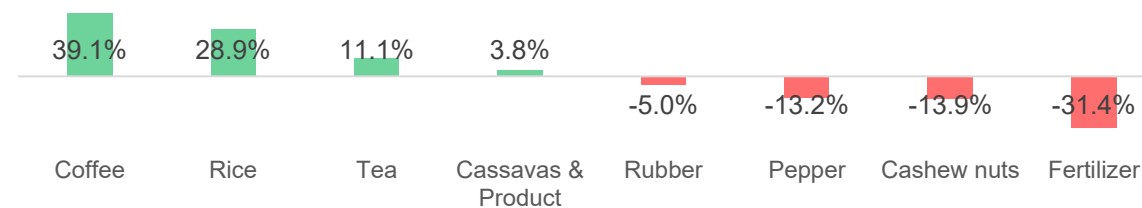
Change key product export value to the ASEAN in Jul-2022 compared to Jul-2022



AFF key product export value to the ASEAN. Aug-2023



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



SPOTLIGHT

Australia Unveils Southeast Asia Economic Strategy to 2040

On September 6, 2023, the Australian government announced the Australia-ASEAN Economic Strategy 2040, which aims to strengthen economic and trade relations with the region. The strategy aims to strengthen economic and trade ties between the two sides. The strategy identifies six priority areas, including agriculture and food, green energy, infrastructure, health, the digital economy, and education.

Australia is currently a major contributor to the food security needs of Southeast Asia, especially wheat, beef, and live cattle. About half of the country's wheat exports go to Southeast Asia, mainly Indonesia, Vietnam, and Philippines.

Source: aseanbriefing.com



Australia Unveils Southeast Asia Economic Strategy to 2040

Philippines and South Korea Sign Free Trade Agreement

On September 7, 2023, the Philippines and South Korea signed a free trade agreement (FTA) to strengthen relations between the two countries. The FTA includes a variety of provisions, including tariff reductions, capacity building, and technical cooperation.

The two countries have committed to significant tariff reductions, with South Korea eliminating tariffs on approximately 94.8% of Philippine products and the Philippines eliminating tariffs on approximately 96.5% of South Korean products.

Expected impact on the agricultural sector, the FTA opens up better market access for agricultural products of Philippines such as bananas, processed pineapples, and various fruits. Philippines agricultural producers can expect increased exports and enhanced competitiveness in the South Korean market.

Source: aseanbriefing.com



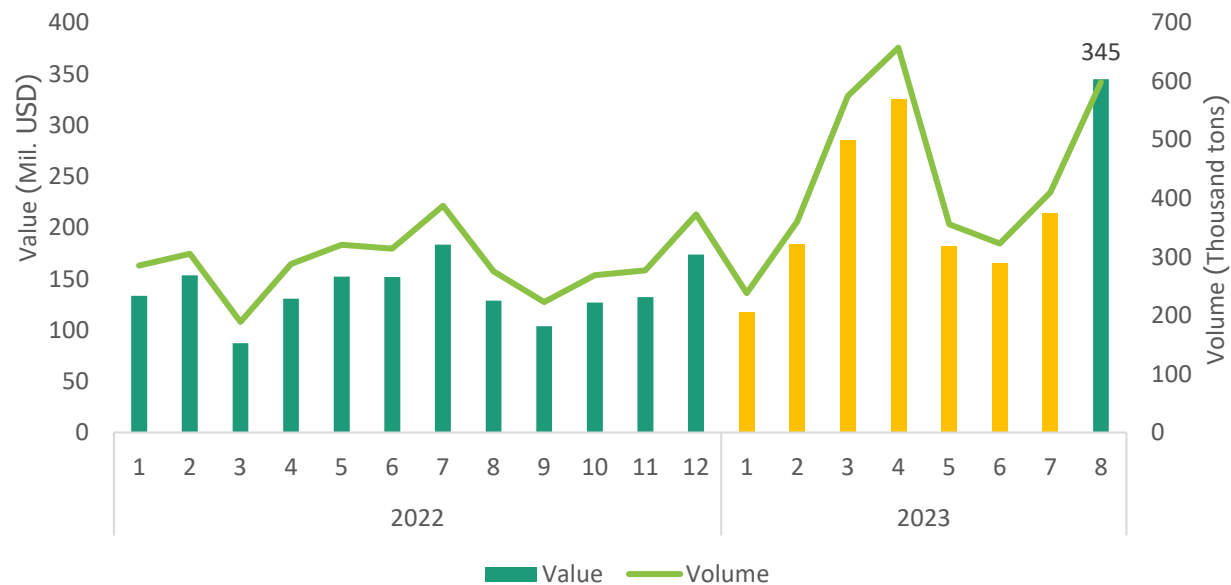
Philippines and South Korea Sign Free Trade Agreement





RICE

Export volume and value of rice the ASEAN, Aug-2023



Export results the ASEAN, Aug-2023

VALUE
344.9 Mil.USD

↗ Increase **60.8%** compared to Jul 2023

↗ Increase **167.9%** compared to Aug 2023

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

◇ Accumulated eight months of 2023 reaches **1.8** Bil. USD; **109.8%** of the total 2022

VOLUME
598.5 Thousand Tons

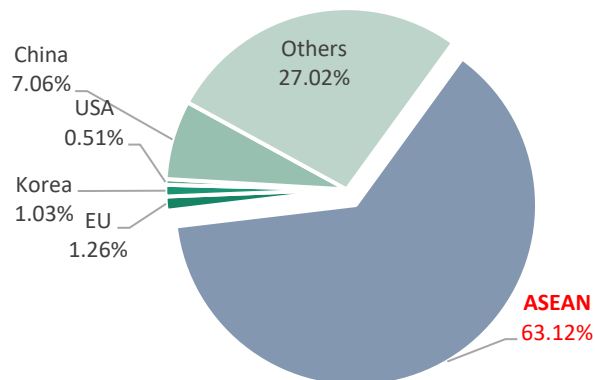
↗ Increase **45.8%** compared to Jul 2023

↗ Increase **117.5%** compared to Aug 2023

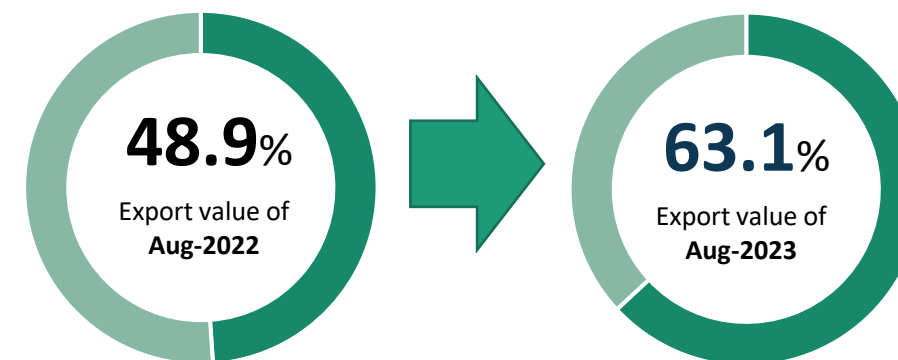
↗ **306.3** Thousand Tons more than the monthly average rate in 2022

◇ Accumulated eight months of 2023 reaches **3.5** Mil. Tons; **100.4%** of the total 2022

Percentage of export value the ASEAN, Aug-2023



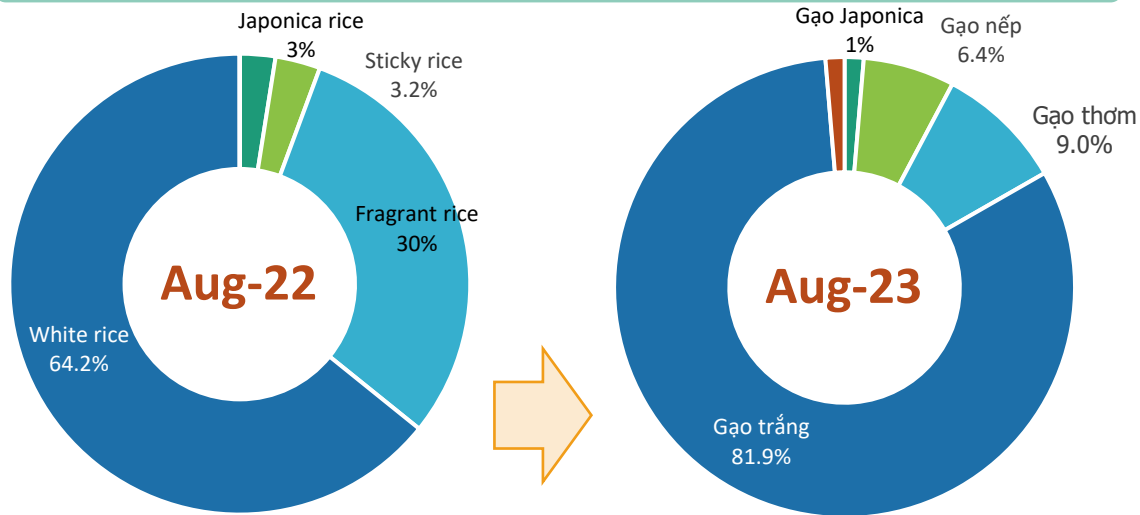
Changes in the percentage of export value the ASEAN, Aug-2023



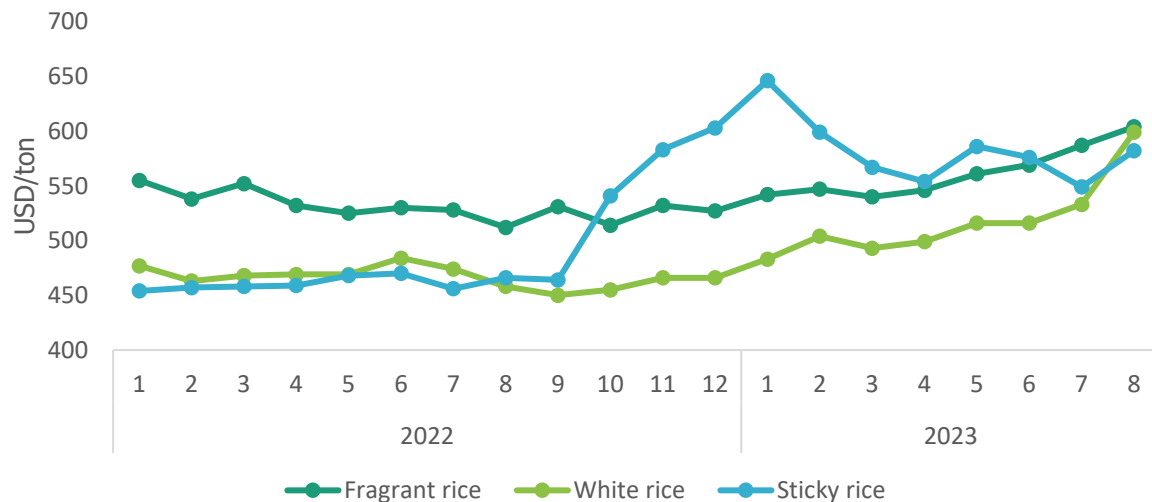


RICE

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



Average export rice price to the ASEAN, Aug-2023



Average export rice price the ASEAN, Aug-2023



White rice

Value: **282.6** Mil.USD
 Increase **57%** compared to Jul-23
 Increase **165%** compared to Aug-22



Fragrant rice

Value: **30.9** Mil.USD
 Increase **73%** compared to Jul-23
 Decrease **38%** compared to Aug-22



Sticky rice

Value: **22.1** Mil.USD
 Increase **142%** compared to Jul-23
 Increase **322%** compared to Aug-22

Sticky rice

The average export in Aug-23 is **582** 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 Aug-23 is **604** USD/ton; **Increase 3%** compared to the previous month; and **Increase 18%** compared to the same month of 2022.

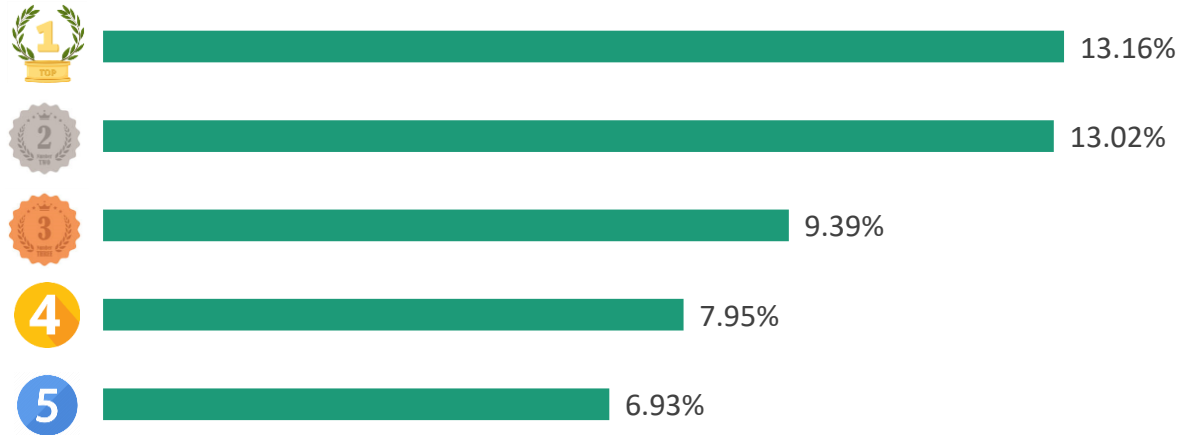
White rice

The average export in Aug-23 is **599** USD/ton; **Increase 13%** compared to the previous month; and **Increase 31%** compared to the same month of 2022.

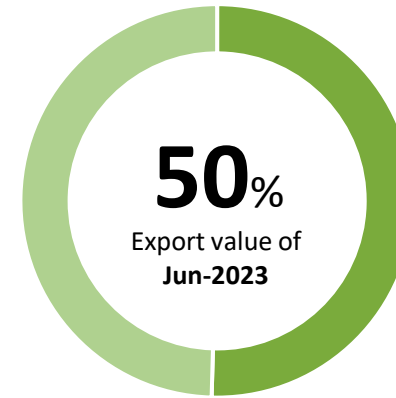


RICE

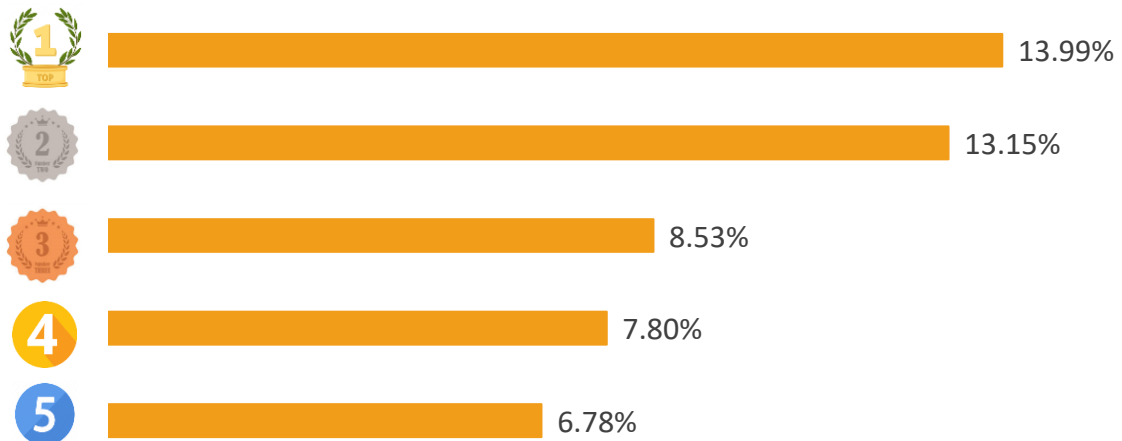
TOP 5 export enterprises by value to the ASEAN, Aug-2023



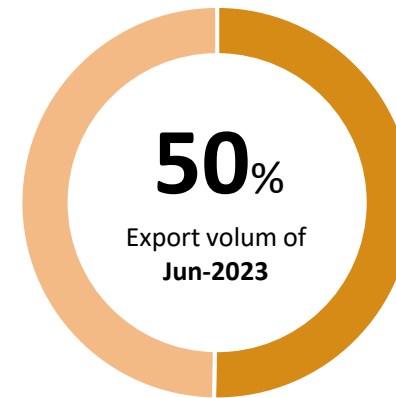
Value ratio of TOP 5 export enterprises to the ASEAN, Aug-2023



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



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





RICE

SPOTLIGHT

01

On September 26, 2023, the head of Indonesia's National Food Agency (Bapanas), Arief Prasetyo Adiannounced that President Jokowi instructed the import of one million tons of rice from China to increase the government's rice reserves for 2024 due to declining domestic production because of El Niño, which resulted in a 5% decrease in rice production.

Source: Vietnamplus.vn

02

The latest forecast from the Agricultural Economic Office under the Ministry of Agriculture and Cooperatives of Thailand shows that the country's rice production is expected to decrease by 871,000 tons, or 3.27%, to 25.8 million tons in the 2023-2024 harvest season, mainly due to the El Niño weather phenomenon.

Source : Thanhnien.vn

03

Malaysia is working to increase domestic production. Producers are being asked to increase production by 20% in one year. They are implementing projects to increase productivity to an average of 7 tons per hectare (from 5 tons) in some large-scale fields and increase the number of cropping seasons. The government has introduced a new initiative to increase rice production and income for rice farmers, with the planting of rice five times in two years, aimed at increasing productivity and bringing the national rice self-sufficiency rate to 80% by 2030 (currently at 70%).

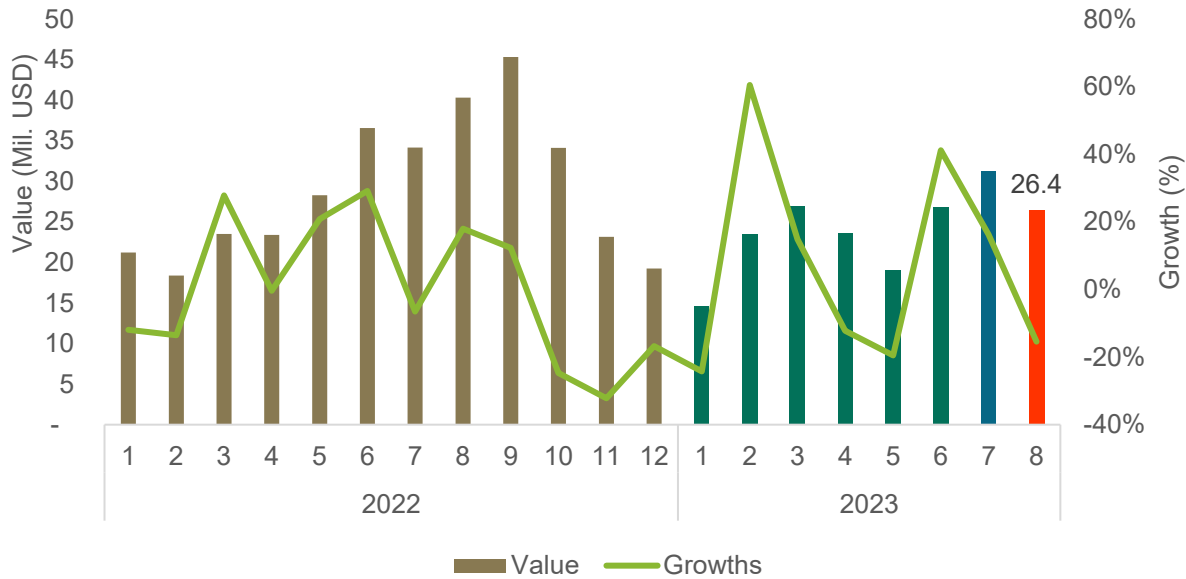
Source : Vnexpress.net





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

VALUE
26.4
Mil.USD

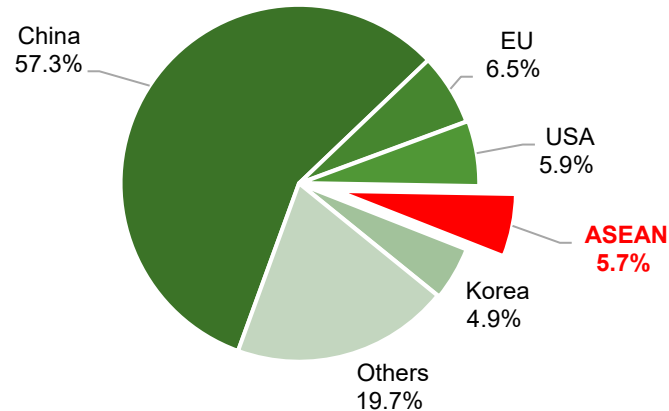
Decrease **15.4%** compared to Jul 2023

Decrease **34.5%** compared to Aug 2022

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

Accumulated eight months of 2023 reaches **192.2 Mil.USD; 55.3%** of the total 2022

Percentage of export value to the ASEAN, Aug-2023



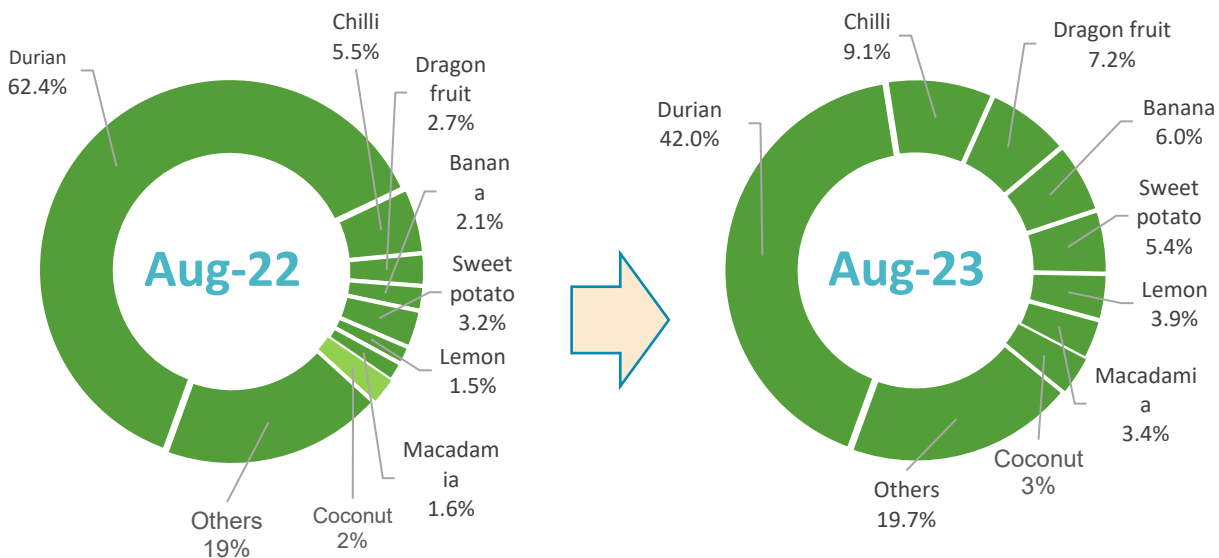
Changes in percentage of export value to the ASEAN, Aug-2023





FRUITS AND VEGETABLES (EXPORT)

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



Export results to the ASEAN, Aug-2023



Durian

Value: **10.5** Mil.USD

Decrease **43.1%** compared to Jul-23

Decrease **58.2%** compared to Aug-22



Chilli

Value: **2.3** Mil.USD

Increase **30.8%** compared to Jul-23

Increase **2.9%** compared to Aug-22



Dragon fruit

Value: **1.8** Mil.USD

Increase **40.5%** compared to Jul-23

Increase **54.5%** compared to Aug-22



Banana

Value: **1.5** Mil.USD

Increase **30.7%** compared to Jul-23

Increase **81.5%** compared to Aug-22



Sweet potato

Value: **1.4** Mil.USD

Increase **34.1%** compared to Jul-23

Increase **6.4%** compared to Aug-22



Lemon

Value: **0.1** Mil.USD

Increase **64.6%** compared to Jul-23

Increase **62.3%** compared to Aug-22



Macadamia

Value: **0.82** Mil.USD

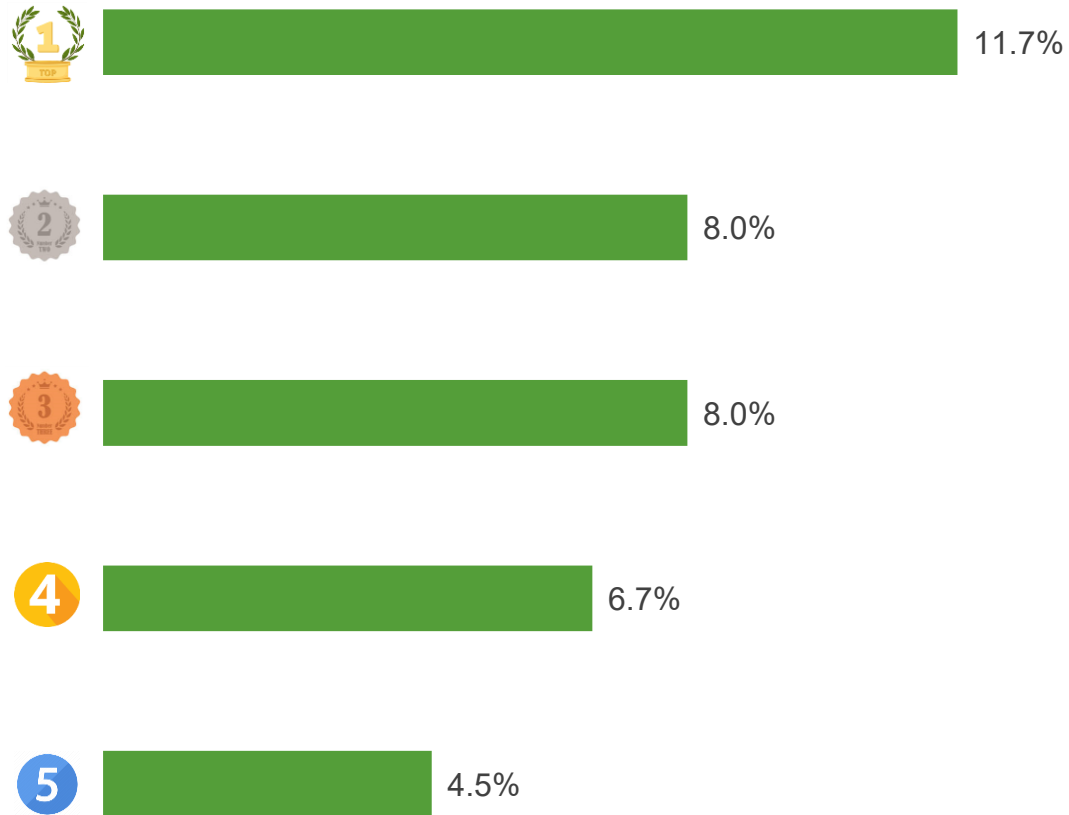
Decrease **9.5%** compared to Jul-23

Increase **35.4%** compared to Aug-22

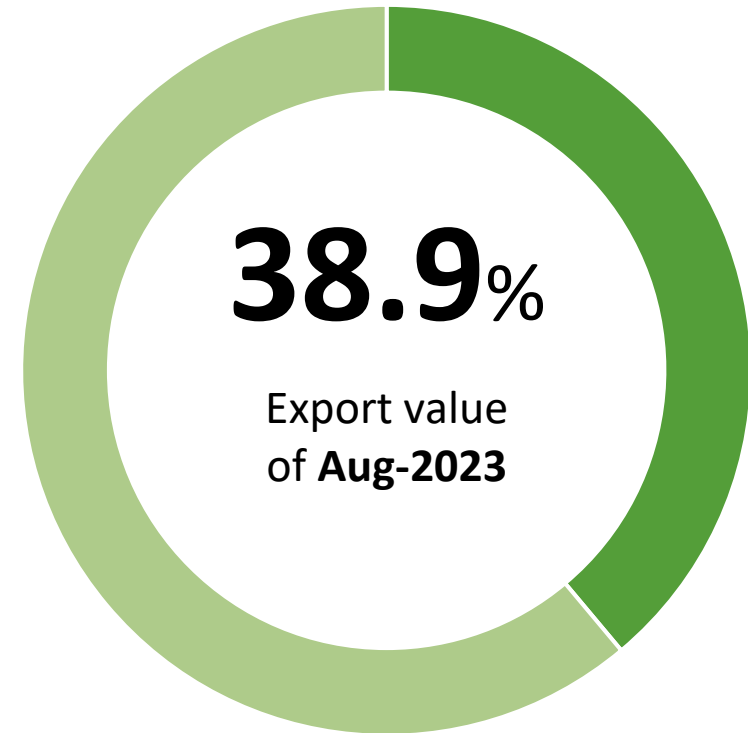


FRUITS AND VEGETABLES (EXPORT)

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



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





FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the ASEAN, Aug-2023



Import results from the ASEAN, Aug-2023

VALUE



17.5

Mil.USD

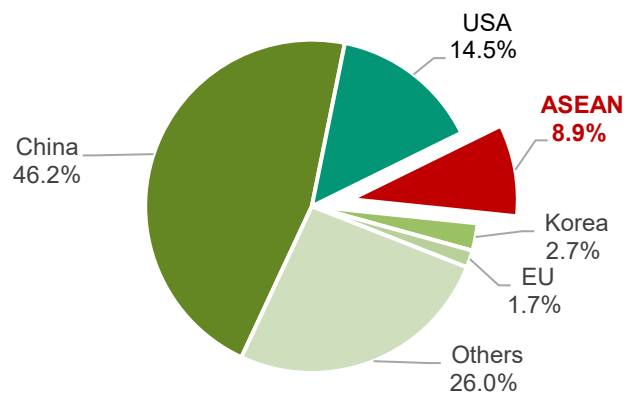
Decrease **10.3%** compared to Jul 2023

Decrease **4.6%** compared to Aug 2023

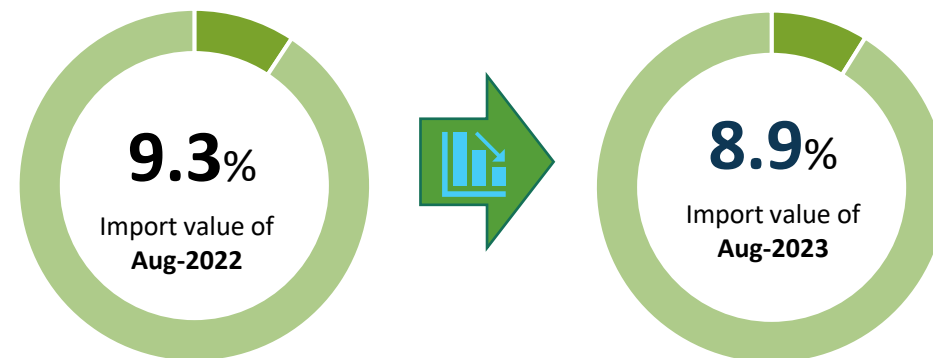
4.7 Mil.USD less than the monthly average rate in 2022

Accumulated eight months of 2023 reaches **153.9 Mil.USD** **57.5%** of the total 2022

Percentage of import value from the ASEAN, Aug-2023



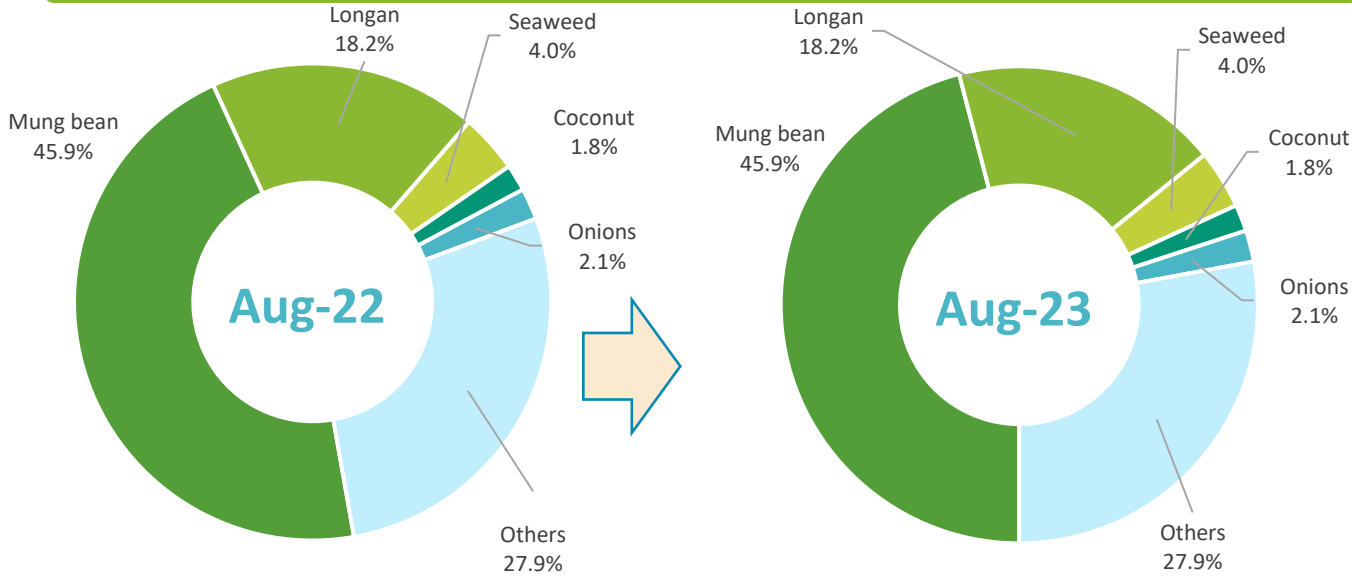
Changes in percentage of import value from the ASEAN, Aug-2023





FRUITS AND VEGETABLES (IMPORT)

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



Seaweed

Value: **0.53** Mil.USD

Increase **58.6%** compared to Jul-23

Decrease **27.6%** compared to Aug-22



Coconut

Value: **0.36** Mil.USD

Increase **247.5%** compared to Jul-23

Increase **9.3%** compared to Aug-22



Onions

Value: **0.36** Mil.USD

Increase **2.4%** compared to Jul-23

Decrease **7.8%** compared to Aug-22

Import results from the ASEAN, Aug-2023



Mung bean

Value: **5.3** Mil.USD

Decrease **53.7%** compared to Jul-23

Decrease **37.6%** compared to Aug-22



Longan

Value: **2.3** Mil.USD

Increase **612.5%** compared to Jul-23

Decrease **31.7%** compared to Aug-22

FRUITS AND VEGETABLES

SPOTLIGHT



01

According to the Philippines Department of Foreign Affairs (DFA), South Korea announced on September 8 that it would allow the import of Hass avocados from the Philippines, following the release of the Official Notice 2023-33 of the South Korean Ministry of Agriculture, Food and Rural Affairs on the import approval process for tropical fruits. Fresh Hass avocados from the Philippines to be exported to South Korea are expected to be harvested and packed by Dole Philippines in Davao, Bukidnon, and South Cotabato.

Source: Freshplaza.com

02

According to the Fruit Commodity Exchange at the Muse border crossing, watermelon exports from Myanmar to China via the border trade route reached over 113,000 tons from January to August this year.

Source: China.org.cn

03

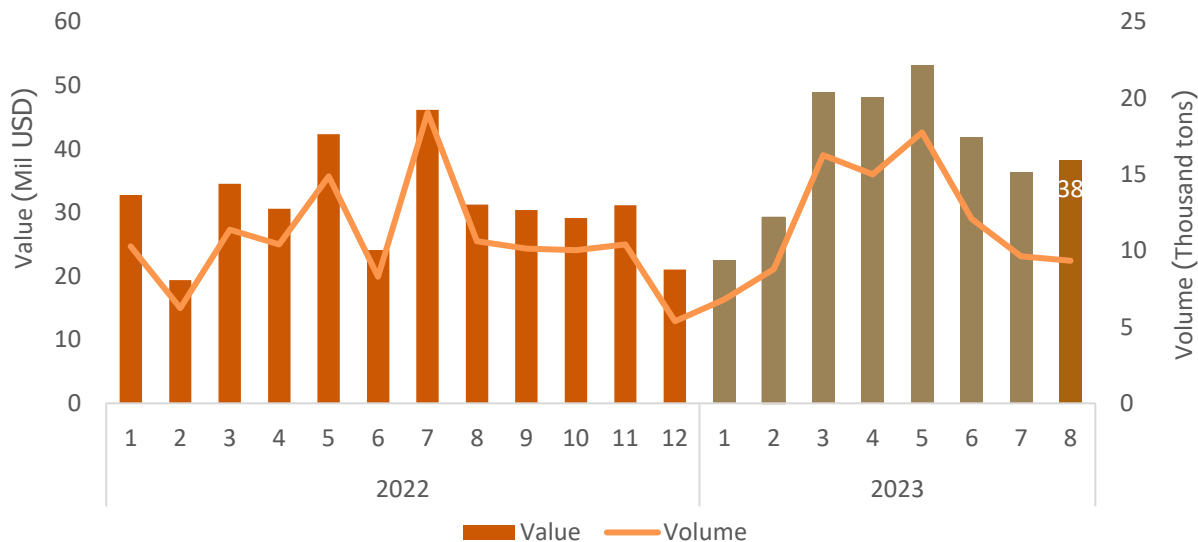
According to the Ministry of Agriculture, Forestry and Fisheries of Cambodia, exports of fresh mangoes from Cambodia to China reached 8,118 tons in the first eight months of 2023, an increase of more than 3,720% over the same period last year.

Source: Freshplaza.com



COFFEE

Export volume and value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

VALUE

38.2 Mil.USD

↑ Increase **5.1%** compared to Jul 2023

↑ Increase **22.4%** compared to Aug 2022

↑ **7.2** Mil.USD more than the monthly average rate in 2022

◇ Accumulated eight months of 2023 reaches **318.2** tr.USD; **85.4%** of the total 2022

VOLUME

9.3 Thousand Tons

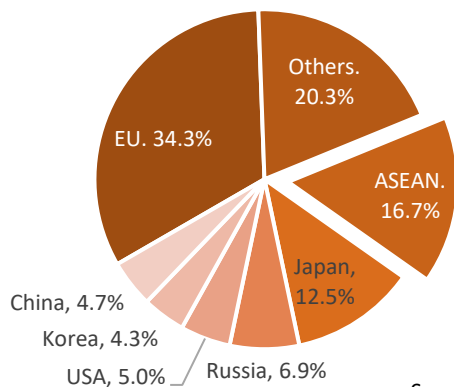
▼ Decrease **3.1%** compared to Jul 2023

▼ Decrease **12%** compared to Aug 2022

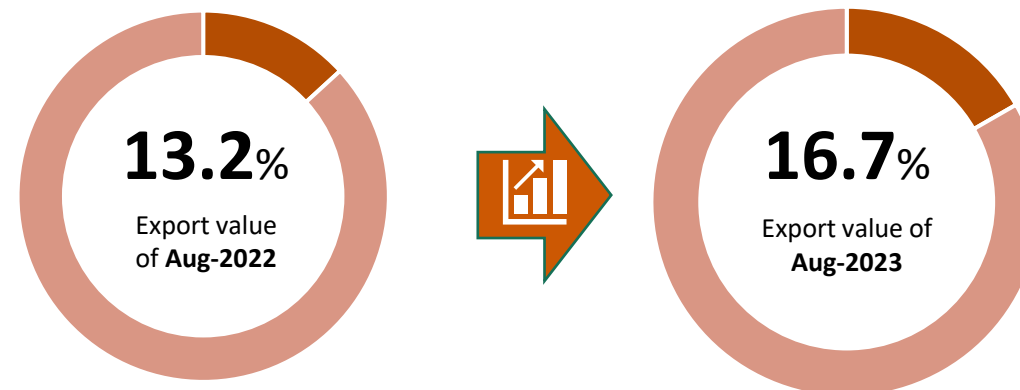
▼ **1.3** Thousand Tons less than the monthly average rate in 2022

◇ Accumulated eight months of 2023 reaches **95.7** Thousand Tons; **75.3%** of the total 2022

Percentage of export value to the ASEAN, Aug-2023



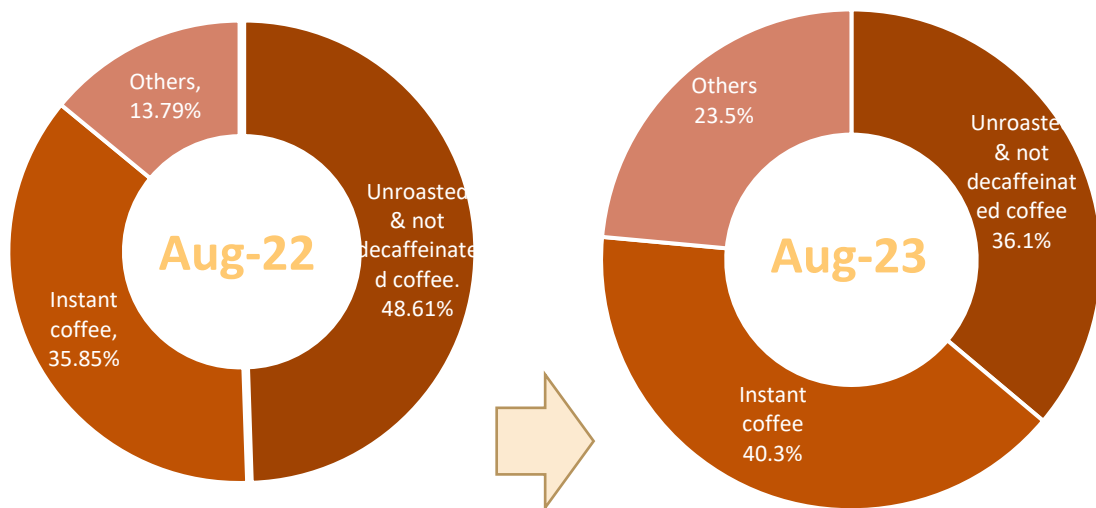
Changes in percentage of export value to the ASEAN, Aug-2023



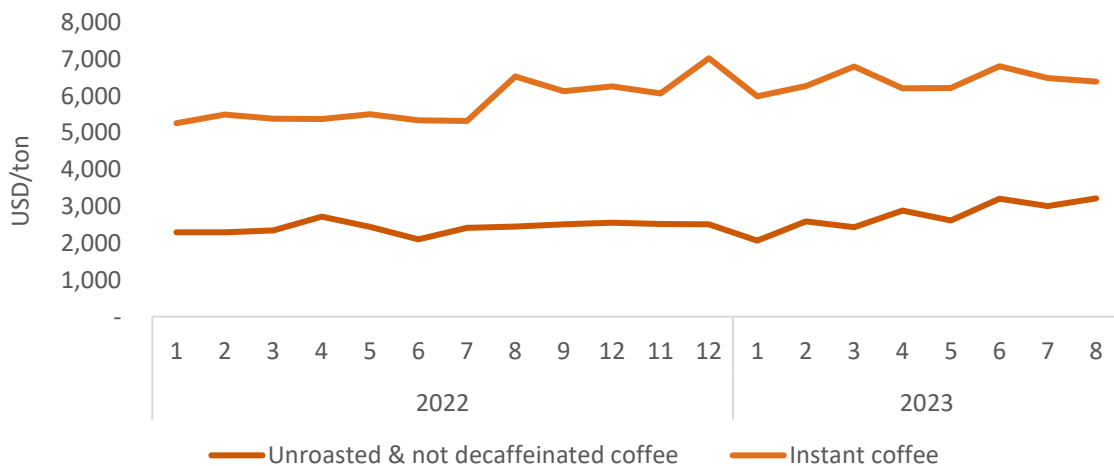
Source: Calculated from data of the General Department of Customs

COFFEE

Structure of exports by products to Aug-2023



Average export price to the ASEAN, Aug 2023



Export results to the ASEAN, Aug-2023



Unroasted & not decaffeinated coffee

Value: **12.4** Mil.USD
 Decrease **19.7%** compared to Jul-23
 Decrease **18.2%** compared to Aug-22



Instant coffee

Value: **13.9** Mil.USD
 Decrease **17.9%** compared to Jul-23
 Increase **23.9%** compared to Aug-22



Roasted and not decaffeinated coffee

Value: **1** Mil.USD
 Increase **6.6%** compared to Jul-23
 Increase **88.2%** compared to Aug-22

Instant coffee

The average export in Aug-23 is **6.381** USD/ton; Decrease **1.5%** compared to the previous month; but Increase **6.8%** compared to the same month of 2022.

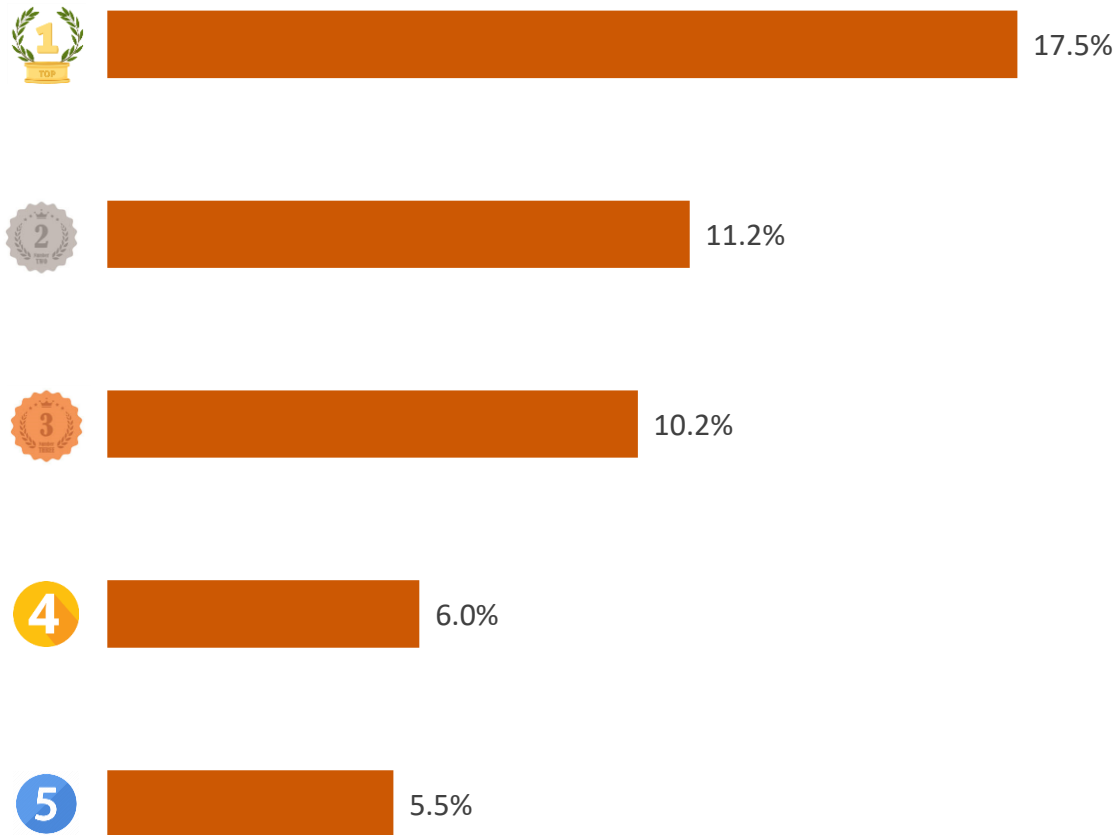
Unroasted & not decaffeinated coffee

The average export in Aug-23 is **3.211** USD/ton; Decrease **2.2%** compared to the previous month; but Increase **31%** compared to the same month of 2022.

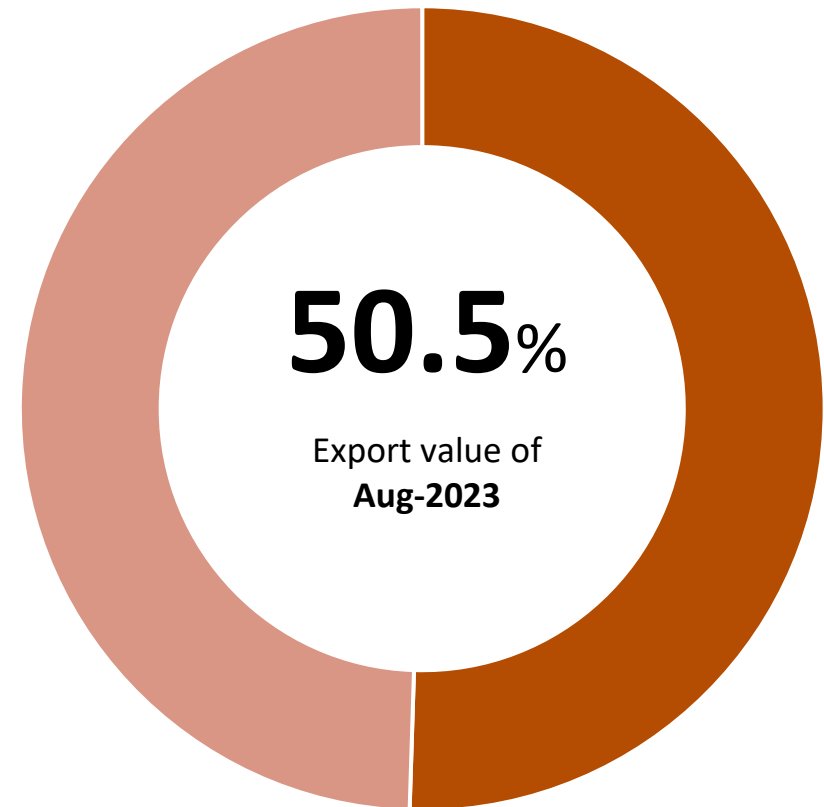


COFFEE

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



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



COFFEE



SPOTLIGHT

According to trade data from Sumatra, Indonesia, Robusta coffee exports from Sumatra in July 2023 fell 10.26% from the same month last year, reaching 252,226 bags. In the first four months of the 2023/24 crop year (from April 2023 to March 2024), export volume fell by 144,271 bags, or 14.54% from last year. The decline was due to falling Robusta coffee prices and lower demand.

The new coffee crop in Indonesia is still providing domestic coffee to meet the rising demand. The estimated production for the 2023/24 coffee year is 10.3 million bags (of which about 8.8 million bags will be Robusta coffee and 1.5 million bags will be Arabica coffee), slightly lower than the average production in the past three years (11.8 million bags).

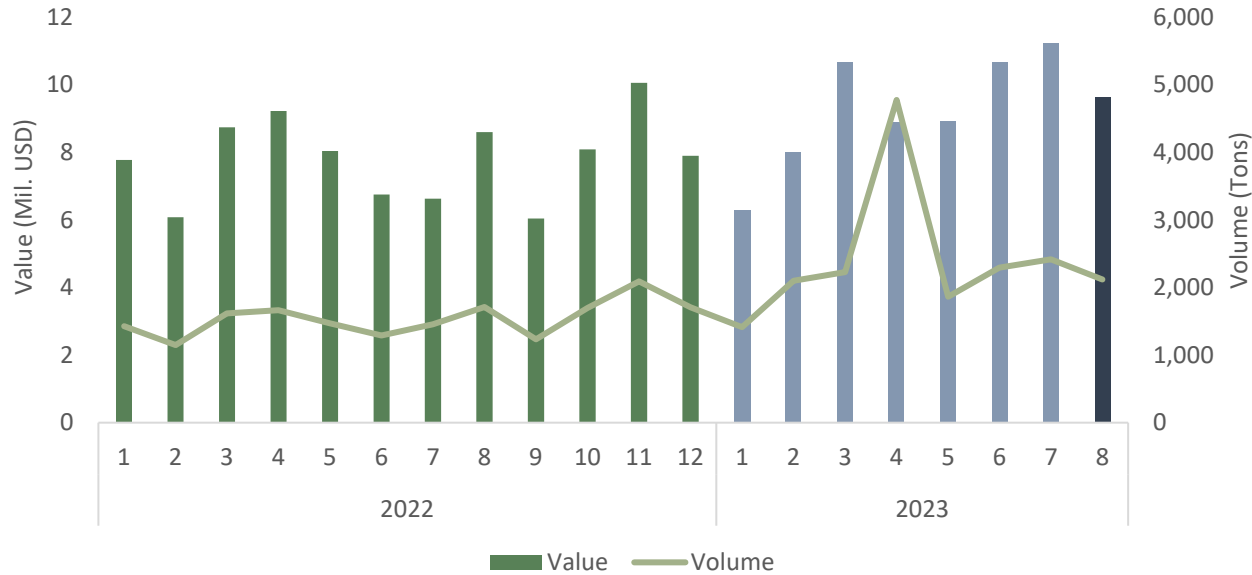
Source *iandmsmith.com* (9/2023)





CASHEW NUTS

Export volume and value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

VALUE
9.3 Mil.USD

↓ Decrease **14.3%** compared to Jul 2023

↗ Increase **12%** compared to Aug 2023

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

Accumulated eight months of 2023 reaches **74.3** Mil.USD; **79%** of the total 2022

VOLUME
2.1 Thousand Tons

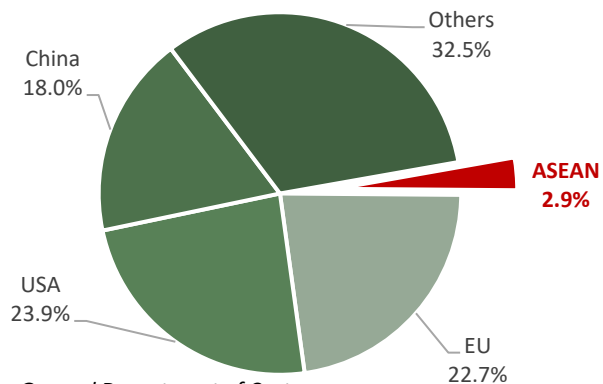
↓ Decrease **12.2%** compared to Jul 2023

↗ Increase **24%** compared to Aug 2023

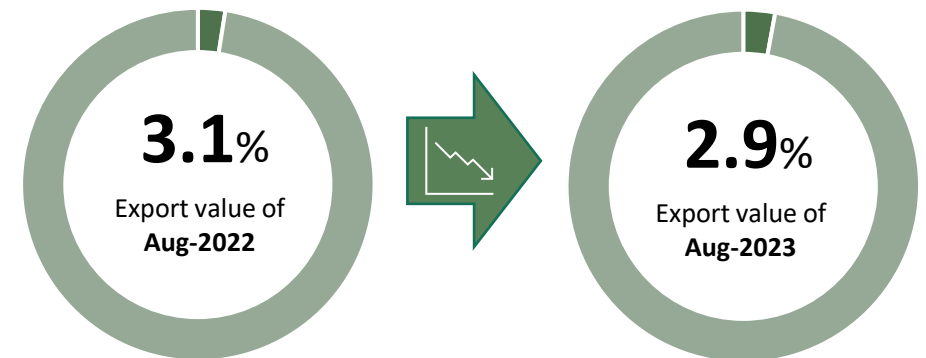
↗ **577 Tons** more than the monthly average rate in 2022

Accumulated eight months of 2023 reaches **19.2** Thousand Tons; **104%** of the total 2022

Percentage of export value to the ASEAN, Aug-2023



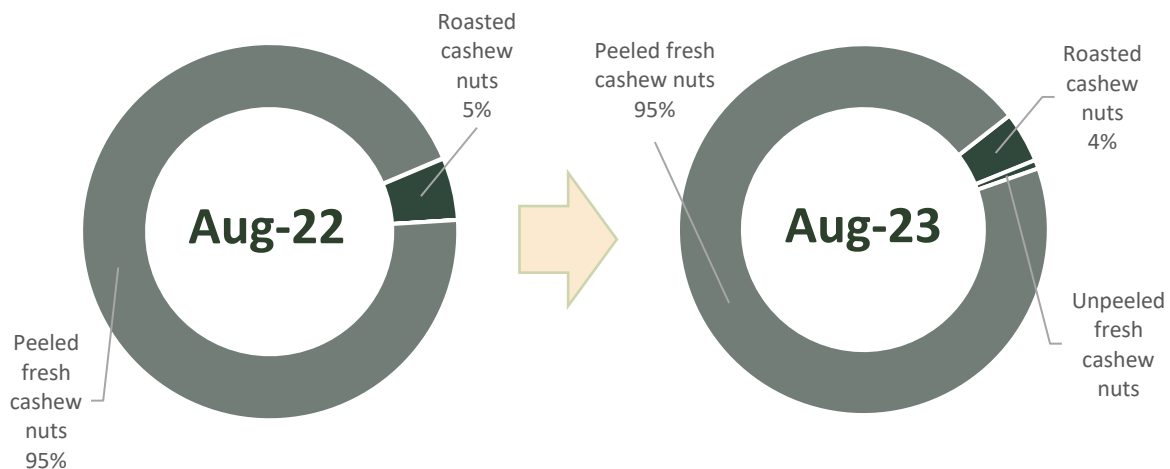
Changes in percentage of export value to the ASEAN, Aug-2023





CASHEW NUTS

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



Average export price to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023



Peeled fresh cashew nuts

Value: **9.1** Mil.USD

Decrease **14.8%** compared to Jul-23

Increase **12.3** compared to Aug-22



Roasted cashew nuts

Value: **0.4** Mil.USD

Increase **9.6%** compared to Jul-23

Decrease **7%** compared to Aug-22

Peeled fresh cashew nuts

The average export in Aug-23 is **8.882** USD/ton; Increase **4.6%** compared to the previous month; but Decrease **5.3%** compared to the same month of 2022.

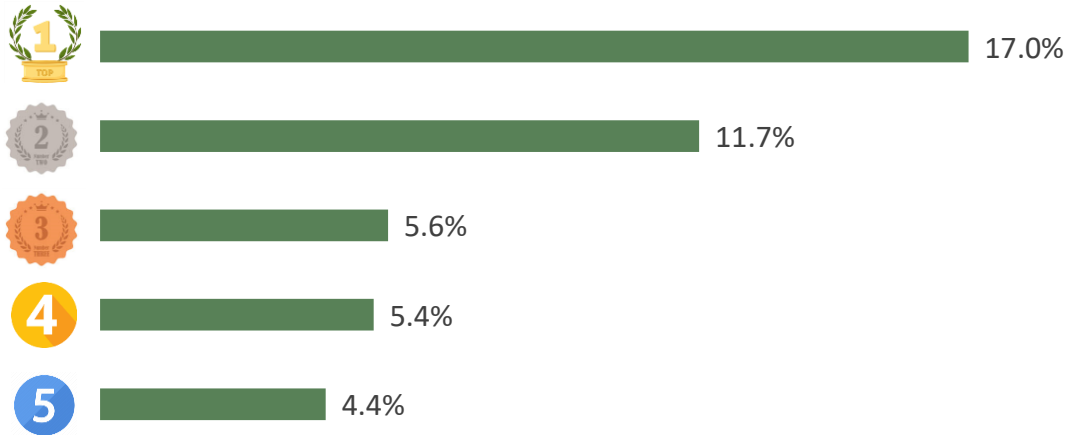
Roasted cashew nuts

The average export in Aug-23 is **6.086** USD/ton; Increase **45.9%** compared to the previous month; and Increase **13.4%** compared to the same month of 2022.

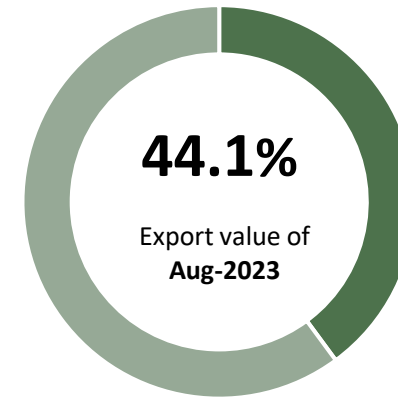


CASHEW NUTS

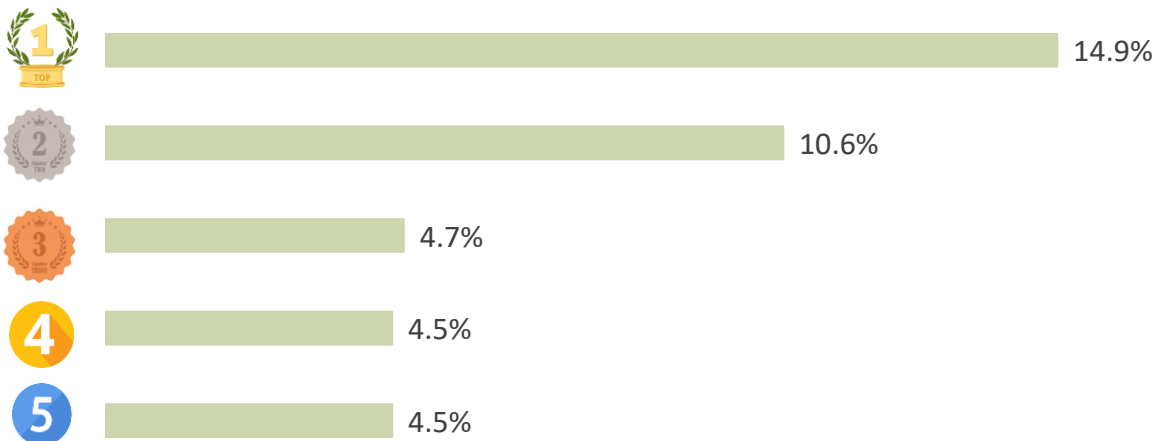
TOP 5 export enterprises by value to the ASEAN , Aug-2023



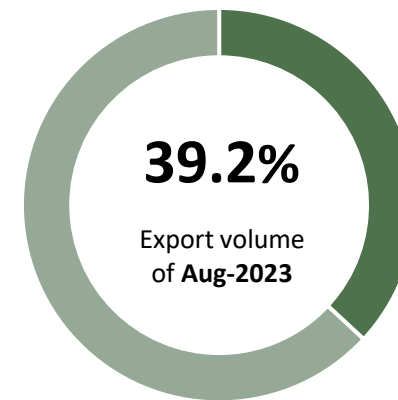
Value ratio of TOP 5 export enterprises to the ASEAN , Aug-2023



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



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



CASHEW NUTS

SPOTLIGHT

Cambodia's cashew exports to Vietnam fell sharply in the first 7 months of the year

In the first 7 months of 2023, Cambodia exported 587,160 tons of cashew nuts to Vietnam, down 14% in volume and 23% in value from the same period in 2022. The export turnover reached over USD 802.3 million.

Cambodia remains the largest supplier of cashew nuts to Vietnam, accounting for over 34% in volume and 38% in value in Vietnam's import structure.

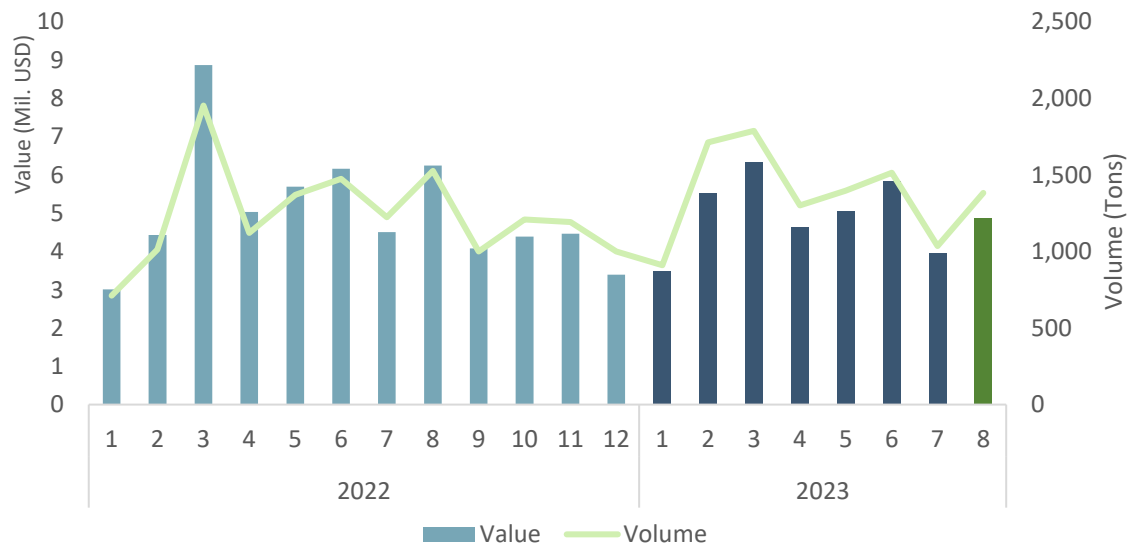
Source: Danviet.vn (09/2023)





PEPPER

Export value and volume to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

VALUE
4.9 Mil.USD

↗ Increase **23.4%** compared to Jul 2023

↘ Decrease **21.9%** compared to Aug 2023

↘ **142.1 Thousand USD** less than the monthly average rate in 2022
Accumulated eight months of 2023 reaches **39.7** Mil.USD; **65.9%** of the total 2022

VOLUME
1.4 Thousand Tons

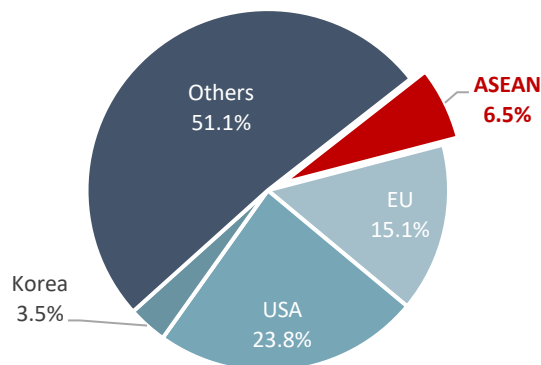
↗ Increase **33.2%** compared to Jul 2023

↘ Decrease **9.5%** compared to Aug 2023

↗ **149 Ton** more than the monthly average rate in 2022

Accumulated eight months of 2023 reaches **11** Thousand Tons; **74.6%** of the total 2022

Percentage of export value to the ASEAN, Aug-2023



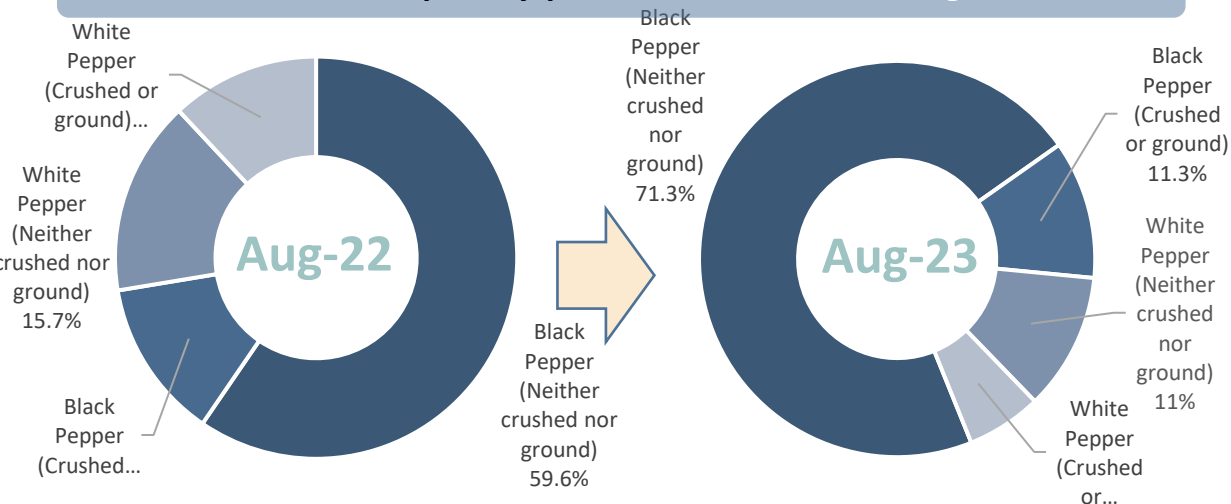
Changes in the percentage of export value to the ASEAN, Aug-2023



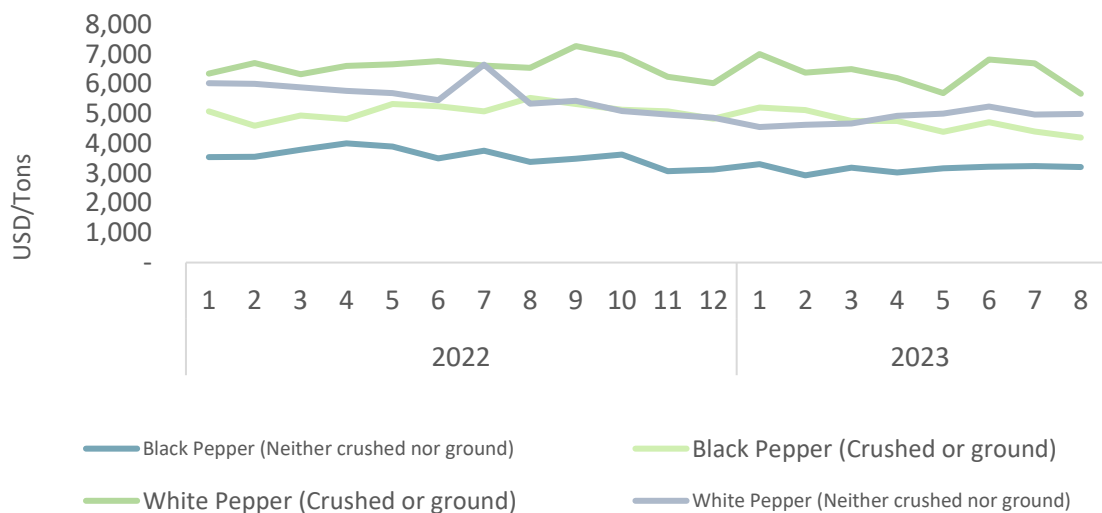


PEPPER

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



Average export price to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023



Black Pepper (Neither crushed nor ground)

Value: **3.5** Mil.USD
 Increase **67%** compared to Jul-23
 Increase **6.4** compared to Aug-22



White Pepper (Neither crushed nor ground)

Value: **0.5** Mil.USD
 Decrease **51%** compared to Jul-23
 Decrease **44%** compared to Aug-22



Black Pepper (Crushed or ground)

Value: **0.5** Mil.USD
 Increase **66%** compared to Jul-23
 Decrease **31.2%** compared to Aug-22

Black Pepper (Neither crushed nor ground)

The average export in Aug-23 is **3.206** USD/ton; **Decrease 1%** compared to the previous month; and **Decrease 8%** compared to the same month of 2022.

White Pepper (Neither crushed nor ground)

The average export in Aug-23 is **4.993** USD/ton; **Increase 1%** compared to the previous month; but **Decrease 6%** compared to the same month of 2022.

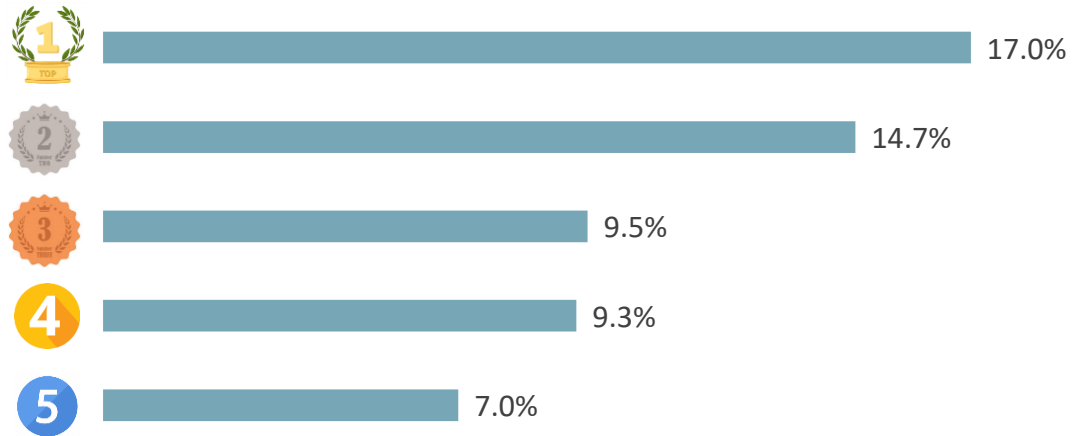
White Pepper (Crushed or ground)

The average export in Aug-23 is **5.663** USD/ton; **Decrease 15%** compared to the previous month; but **Decrease 13%** compared to the same month of 2022.

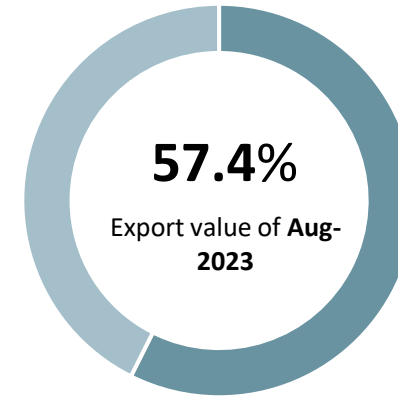


PEPPER

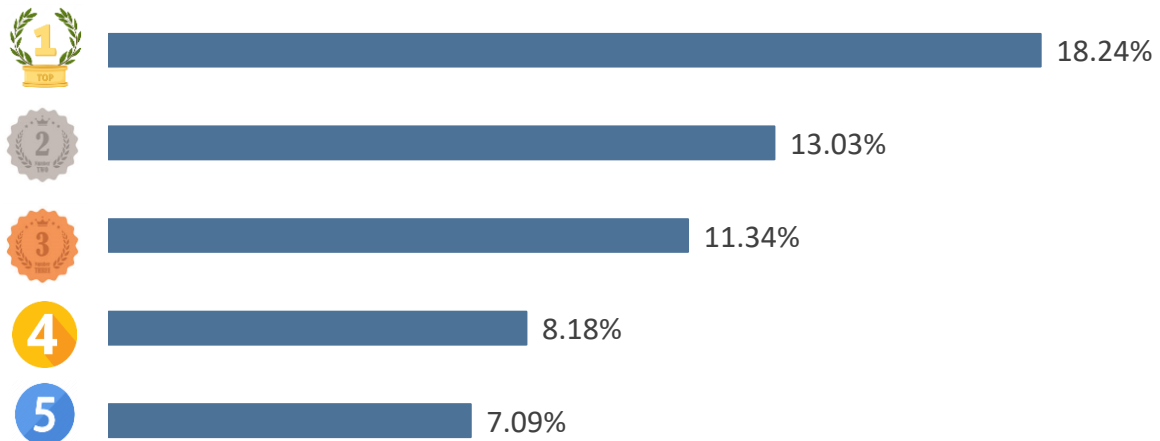
TOP 5 export enterprises by value to the ASEAN, Aug-2023



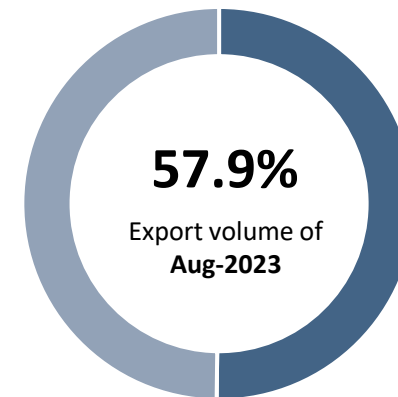
Value ratio TOP 5 export enterprise to the ASEAN, Aug-2023



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



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



PEPPER



SPOTLIGHT

01

In ASEAN, Vietnam is the largest buyer of pepper from Cambodia, accounting for about 70% of Cambodia's total pepper exports. However, despite many regional and bilateral free trade agreements, tariff barriers and plant quarantine issues remain.

The Kampot Pepper Promotion Association said demand for Kampot pepper remains strong, especially from buyers in the European market. However, the high costs of maintaining pepper plantations have forced some farmers to quit, reducing the number of association members from 460 households to just over 350 households..

Source: Vietnam Pepper Association (09/2023)

02

By the end of August 2023, Cambodia's Kampot pepper exports reached about 62 tons, a slight increase over the same period in 2022. The Kampot Pepper Promotion Association (KPPA) expects this number to reach more than 100 tons in 2023. Recently, a company purchased 26 tons of Kampot pepper from farmers and requested import documents. Therefore, Kampot pepper exports could reach about 90 tons in September and more than 100 tons as expected by the end of 2023.

Despite the El Nino phenomenon threatening agricultural production in Southeast Asia, the Kampot Pepper Promotion Association still affirms that this does not affect the cultivation and productivity of Kampot pepper trees. The total area of Kampot pepper in Cambodia is about 24,000 hectares. This year's Kampot pepper harvest has ended.

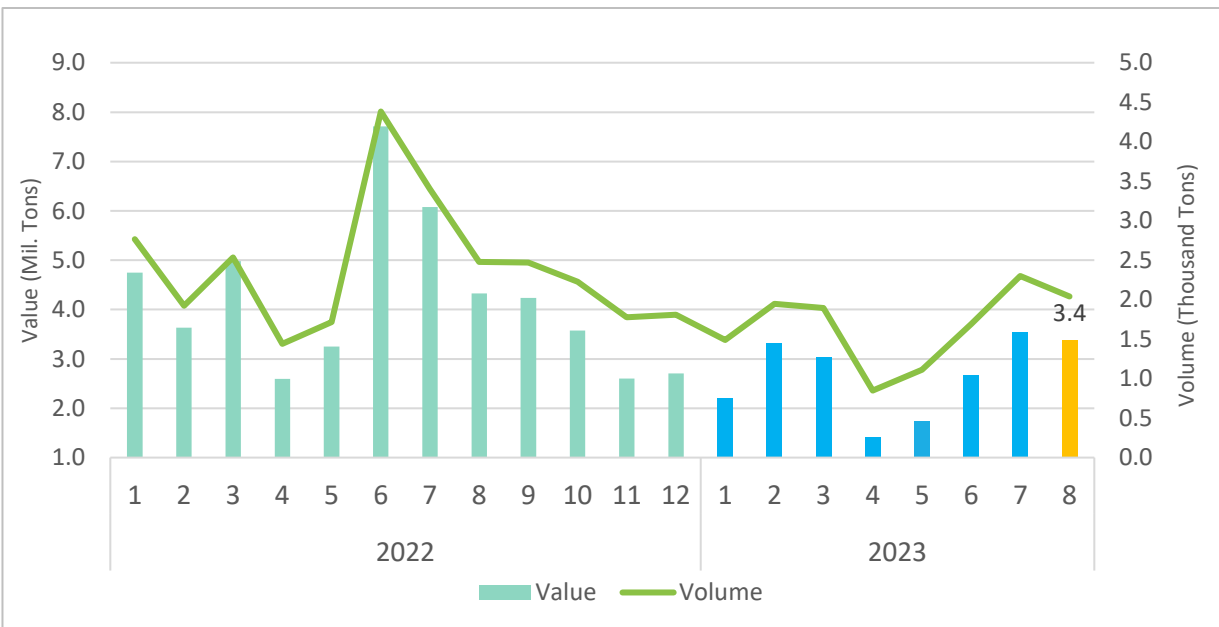
Source : Vietnambiz (09/2023)



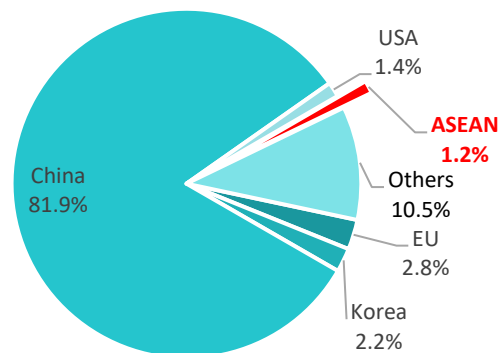


RUBBER

Export volume and value to the ASEAN, Aug-2023



Percentage of export value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

VALUE

3.4 Mil.USD

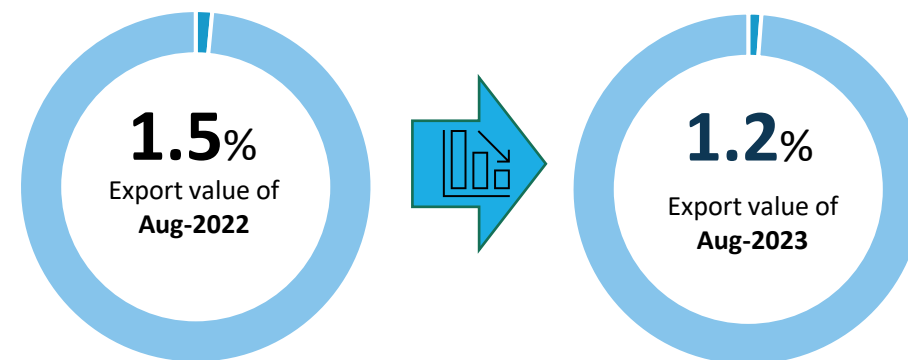
- ↘ Decrease **4.7%** compared to Jul 2023
- ↘ Decrease **21.8%** compared to Aug 2023
- ↓ **0.8** Mil.USD less than the monthly average rate in 2022
- ◇ Accumulated eight months of 2023 reaches **21** Mil.USD; **42%** of the total 2022

VOLUME

2.0 Thousand Tons

- ↘ Decrease **11.3%** compared to Jul 2023
- ↘ Decrease **17.7%** compared to Aug 2023
- ↓ **0.4** Thousand Tons less than the monthly average rate in 2022
- ◇ Accumulated eight months of 2023 reaches **13** Thousand Tons; **46%** of the total 2022

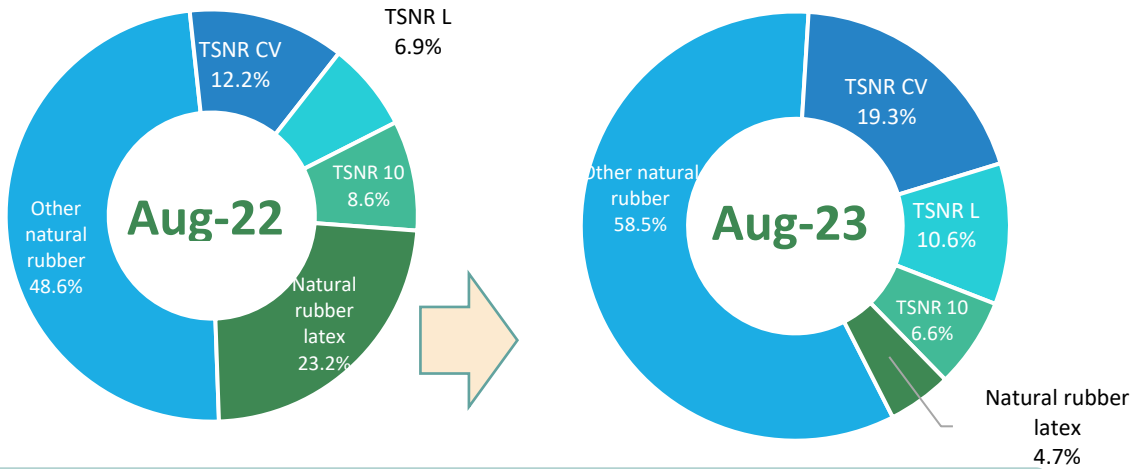
Changes in the percentage of export value to the ASEAN, Aug-2023



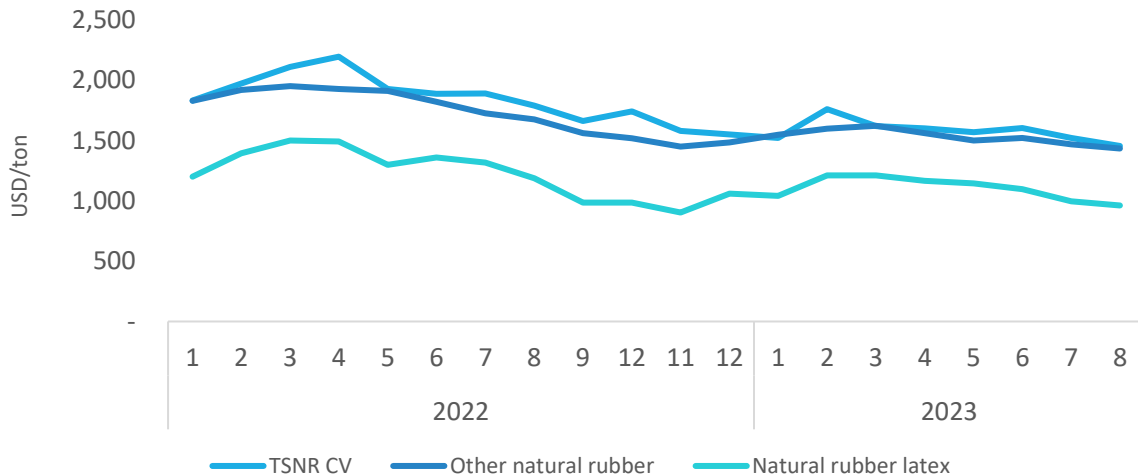


RUBBER

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



Average export price to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023



Other natural rubber

Value: **1.4** Mil.USD
 Increase **48%** compared to Jul-23
 Decrease **12%** compared to Aug-22



TSNR CV

Value: **0.46** Mil.USD
 Increase **29%** compared to Jul-23
 Increase **16%** compared to Aug-22



Natural rubber latex

Value: **0.12** Mil.USD
 Decrease **54%** compared to Jul-23
 Decrease **85%** compared to Aug-22

Other natural rubber

The average export in Aug-23 is **1.433** USD/ton; **Decrease 2.3%** compared to the previous month; and **Decrease 14.4%** compared to the same month of 2022.

TSNR CV

The average export in Aug-23 is **1.454** USD/ton; **Decrease 4.3%** compared to the previous month; and **Decrease 18.7%** compared to the same month of 2022.

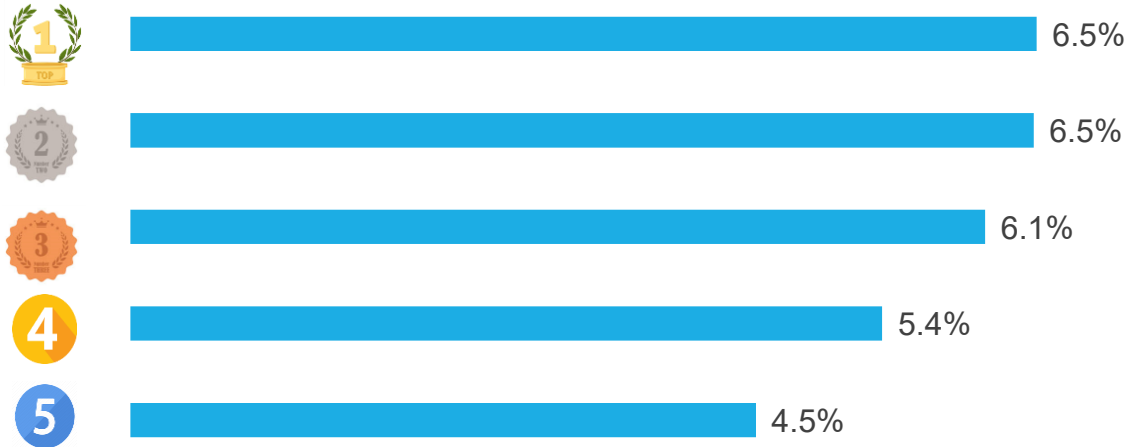
Natural rubber latex

The average export in Aug-23 is **961** USD/ton; **Decrease 3.4%** compared to the previous month; and **Decrease 19%** compared to the same month of 2022.

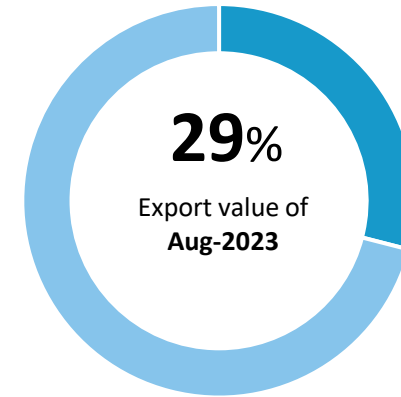


RUBBER

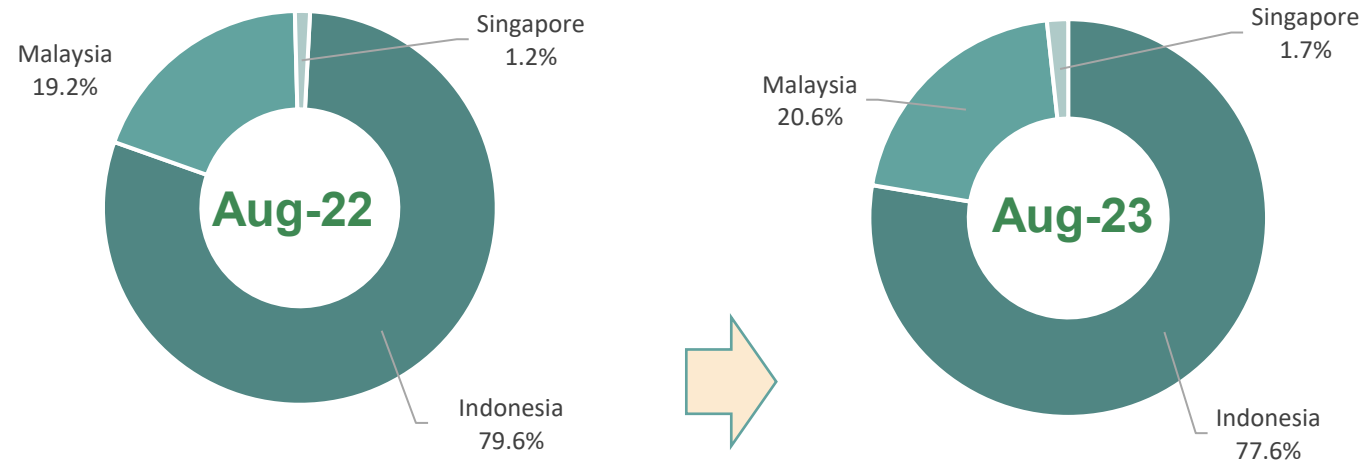
TOP 5 export enterprises by value to the ASEAN, Aug-2023



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



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





RUBBER

SPOTLIGHT



❖ According to the Malaysian Department of Statistics, the amount of natural rubber exported in July 2023 decreased by 3.7% over the same period to 51,785 tons, an increase of 6% over the previous month. Out of the total export, 42.8% went to China, followed by 9.5% to Germany, 4.4% to Pakistan, 3.3% to the United States, and 2.2% to Brazil..

Source: Department of Statistics Malaysia

❖ In the first eight months of 2023, Thailand exported 2.99 million tons of natural and mixed rubber, down 8.5% over the same period last year. Thailand exported natural rubber, reaching 1.759 million tons, down 23% over the same period the previous year.

In the Chinese market, from January to August, Thailand's export volume of natural rubber and mixed rubber reached 1.887 million tons, up 13% over the same period last year. Natural rubber exports to China alone reached 666,000 tons, down 3% over the same period the previous year.

Source : Ministry of Commerce of Thailand

❖ According to the General Department of Customs of Cambodia, from January to August 2023, Cambodia's export value of rubber and rubber products reached 479.396 million USD. In August 2023, Cambodia's rubber export value reached more than 94 million USD, an increase of 139% over the same period in 2022. Cambodia's main rubber export markets are Vietnam, Malaysia, China, and Singapore, Japan, S.Korea, and the European Union.

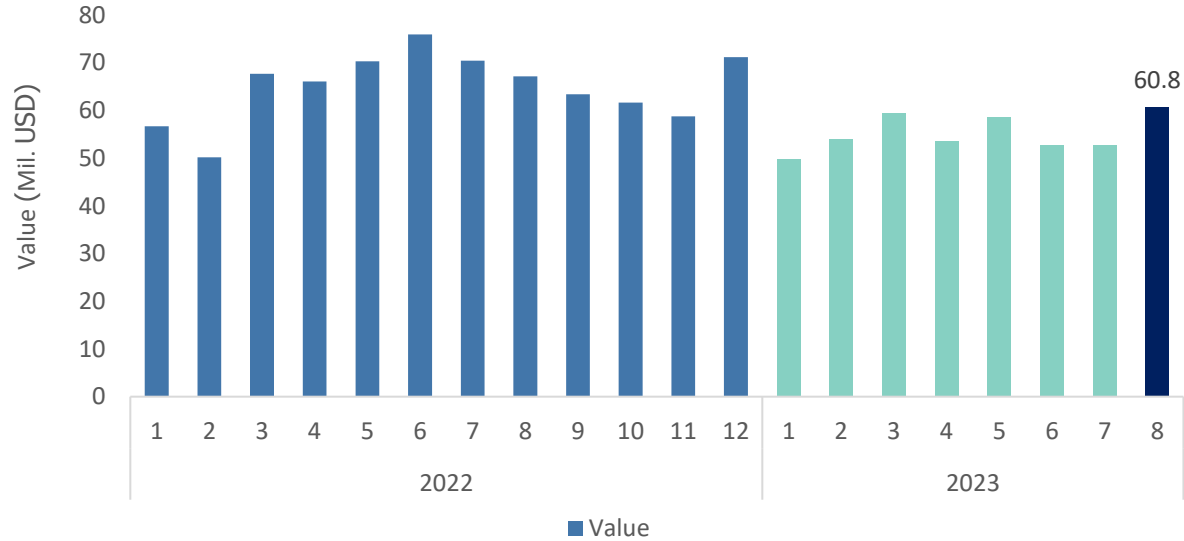
Source : General Department of Customs of Cambodia





SEAFOOD

Export value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023

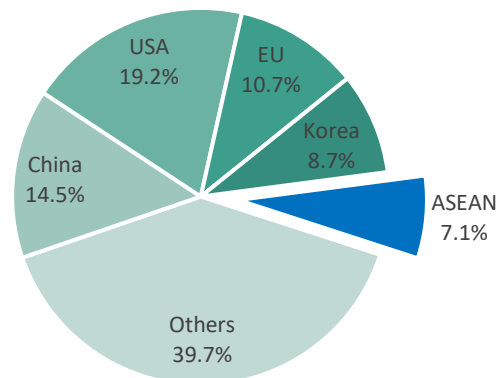
VALUE



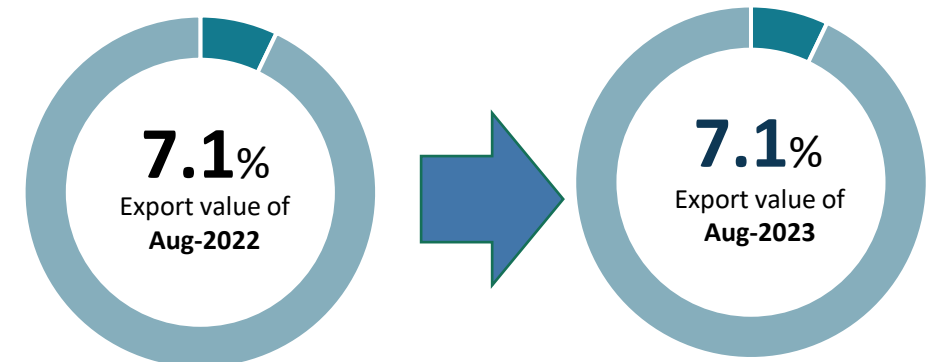
60.8 Mil.USD

- ↗ Increase **15.2%** so với T7/2023
- ↘ Decrease **9.5%** compared to Aug 2023
- ↘ **4.2 Mil.USD** less than the monthly average rate in 2022
- ◇ Accumulated eight months of 2023 reaches **411.5 tr.USD** **56.6%** of the total 2022

Percentage of export value to the ASEAN, Aug-2023



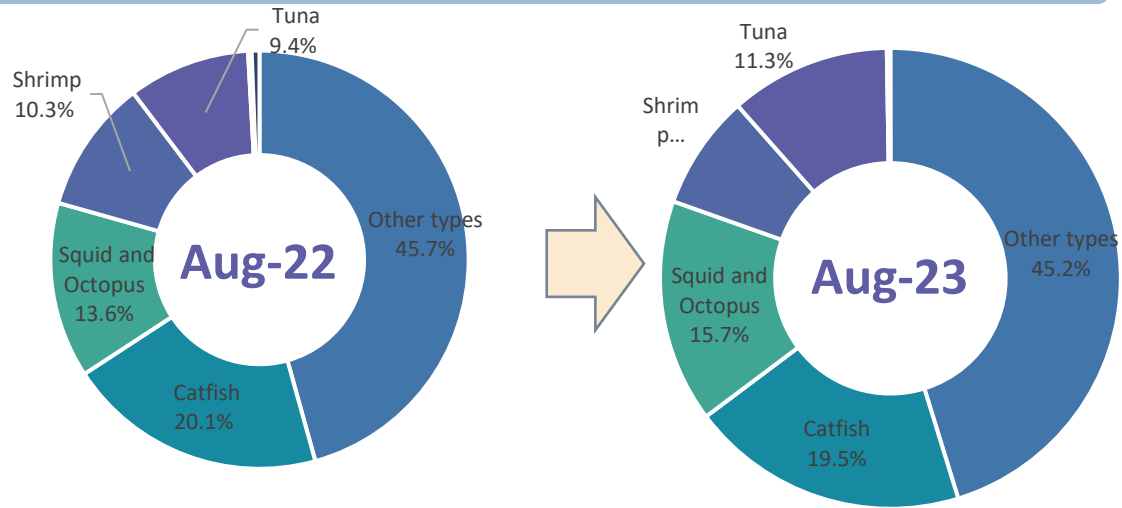
Change in percentage of export to the ASEAN, Aug-2023



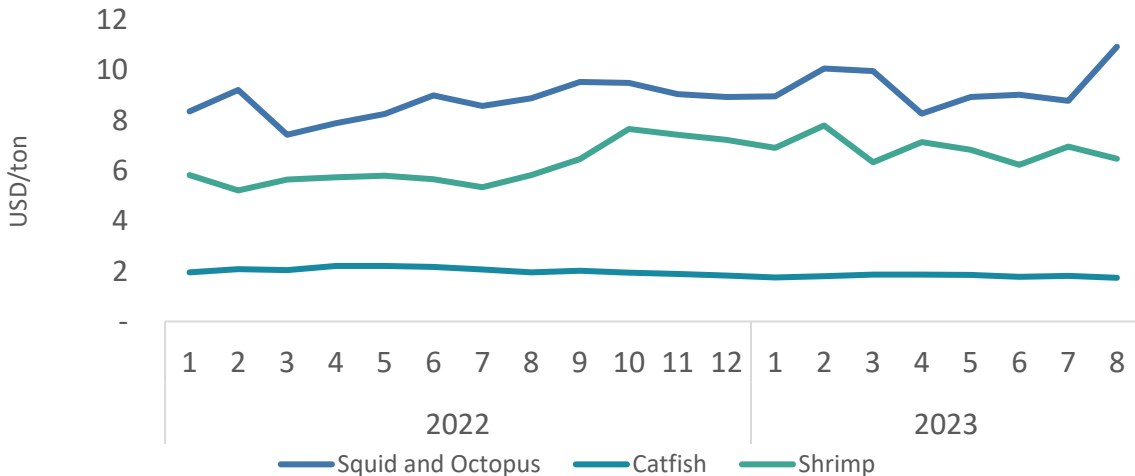


SEAFOOD

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



Average export price to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023



Catfish

Value: **11.7** Mil.USD

Increase **15.2%** compared to Jul-23

Decrease **12.6%** compared to Aug-22



Squid and Octopus

Value: **9.4** Mil.USD

Increase **8.0%** compared to Jul-23

Increase **3.8%** compared to Aug-22



Shrimp

Value: **4.8** Mil.USD

Decrease **17.1%** compared to Jul-23

Decrease **29.7%** compared to Aug-22

Squid and Octopus

The average export in Aug-23 is **10.9** USD/kg; Increase **24.5%** compared to the previous month; and Increase **23%** compared to the same month of 2022.

Catfish

The average export in Aug-23 is **1.7** USD/kg; Decrease **4.2%** compared to the previous month; and Decrease **11.3%** compared to the same month of 2022.

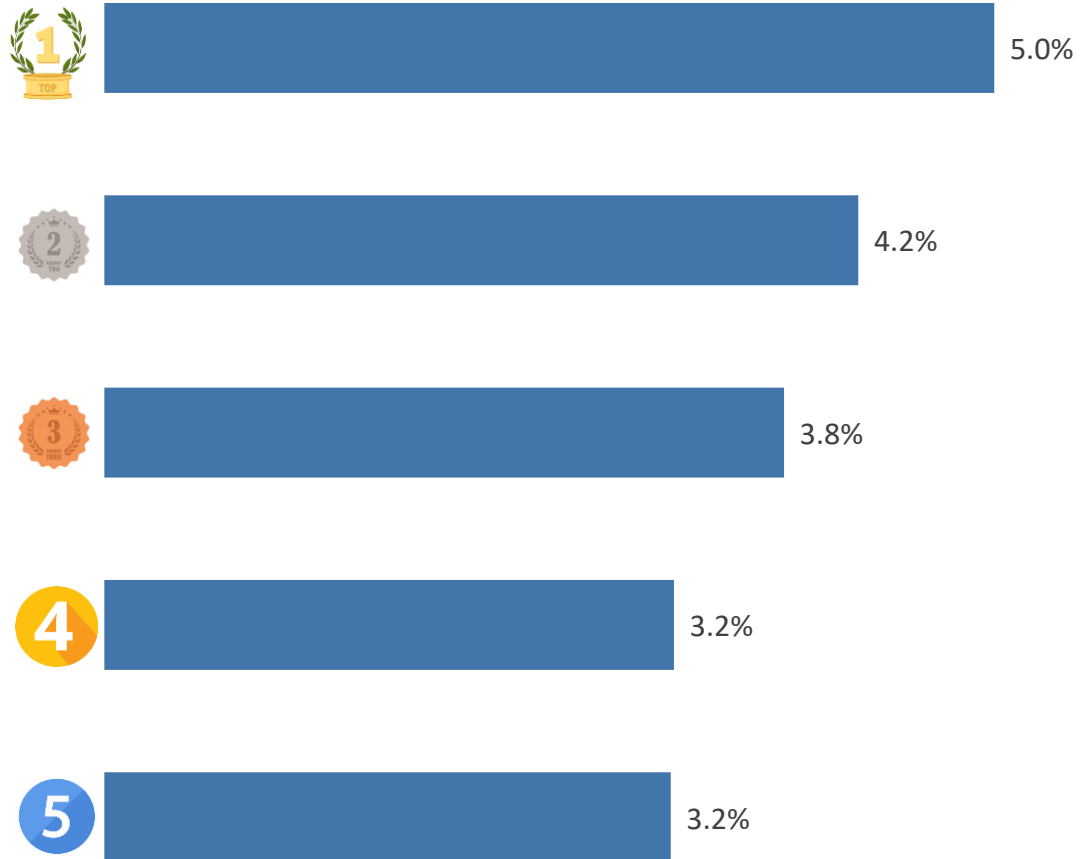
Shrimp

The average export in Aug-23 is **6.5** USD/kg; Decrease **6.9%** compared to the previous month; but Increase **11.3%** compared to the same month of 2022.

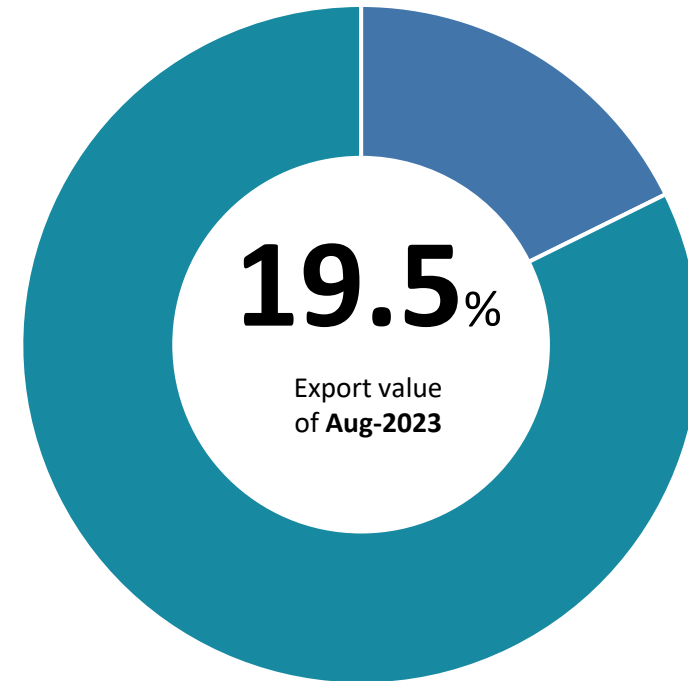


SEAFOOD

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



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



01

Skipjack tuna prices fall in Thailand.

In August, the average price of frozen whole skipjack tuna delivered in Bangkok was 1,900 USD/ton, which was lower than the previous price of 2,050 USD/ton. In September 2023, the price of raw skipjack tuna is expected to decrease by about 150 USD USD/ton compared to the August price. Meanwhile, in Manta, Ecuador, the cost of tuna delivered on board is still higher than in Bangkok, at 1,900 - 1,950 USD/ton.

Source: Vasep (9/2023)

02

Indonesia asked Japan to remove the export tax on canned fish

The Indonesian Ministry of Trade has asked Japan to remove four tax rates on Indonesian canned tuna products as part of the Protocol amending the economic cooperation agreement between Japan and Indonesia. The Indonesian Minister of Trade said that this move was necessary to complete negotiations and was optimistic that both countries would sign the expected protocol at Thursday's ASEAN-Japan 50th Anniversary Summit in Tokyo in December 2023.

Source: Vasep(9/2023)





MEAT & MEAT PRODUCTS (EXPORT)

Export value to the ASEAN, Aug-2023



Export results to the ASEAN, Aug-2023



VALUE

↗ Increase **82%** so với T7/2023

↗ Increase **319%** compared to Aug 2023

↑ **4.5 Tr.USD** more than the monthly average rate in 2022

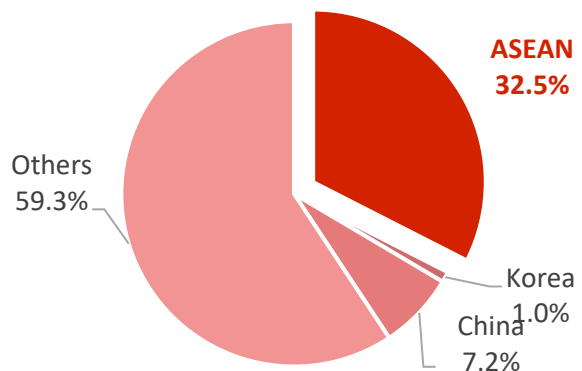
◇ Accumulated eight months of 2023 reaches

6.5

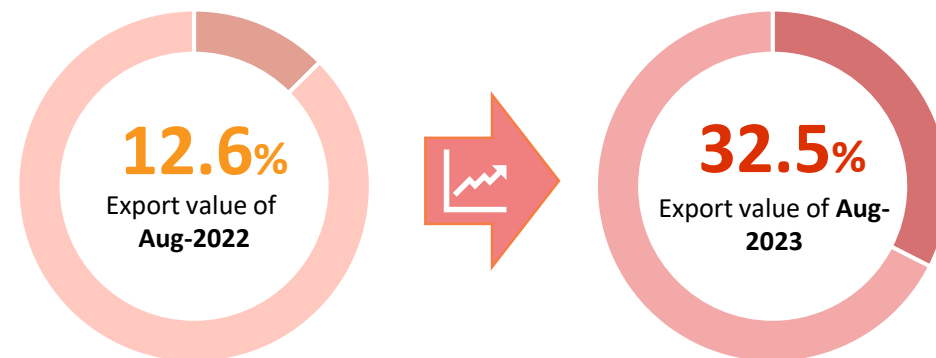
Mil.USD

28.2 Mil.USD; 123% of the total 2022

Percentage of export value to the ASEAN, Aug-2023



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





MEAT & MEAT PRODUCTS (EXPORT)

Import value from the ASEAN, Aug-2023



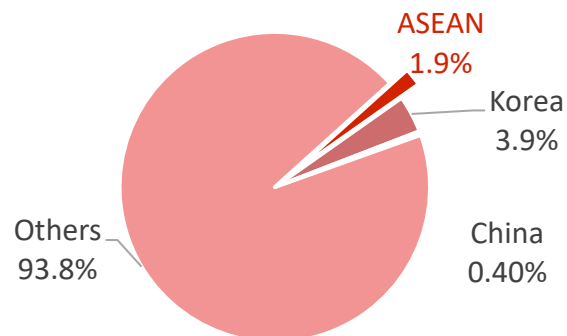
Import results from the ASEAN, Aug-2023

VALUE

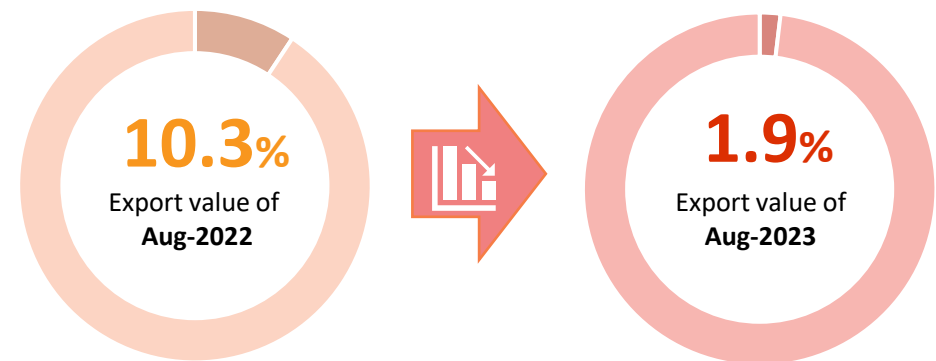
- ↗ Increase **104%** so với T7/2023
- ↘ Decrease **82%** compared to Aug 2023
- ↘ **8.7 Mil.USD** the monthly average rate in 2022
- ◇ Accumulated eight months of 2023 reaches **10.9 Mil.USD**; **7.7%** of the total 2022

3.13
Mil.USD

Percentage of import from the ASEAN, Aug-2023



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

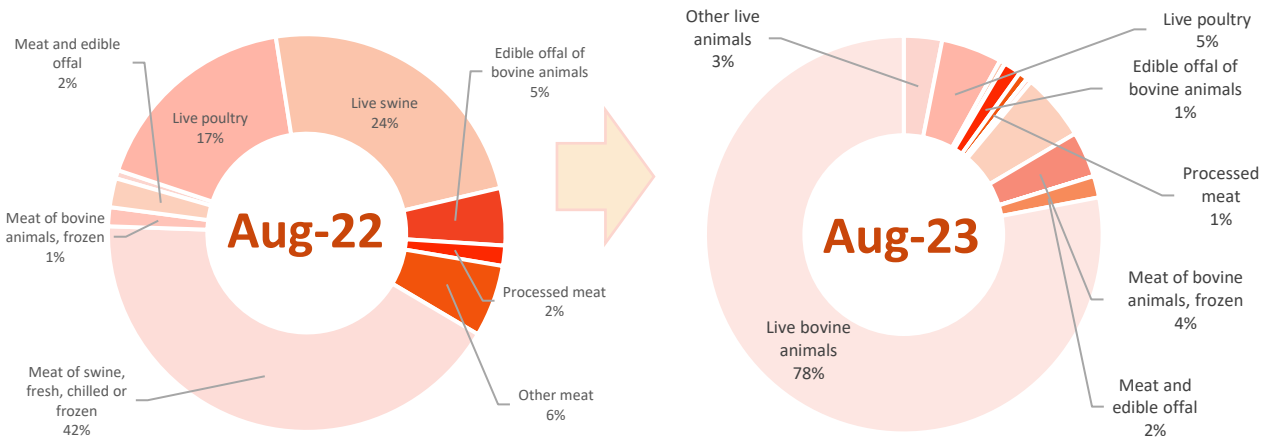


Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS

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



Import results to the ASEAN, Aug-2023



Live bovine animals
 Value: **5.0** Mil.USD
 Increase **153%** compared to Jul-23

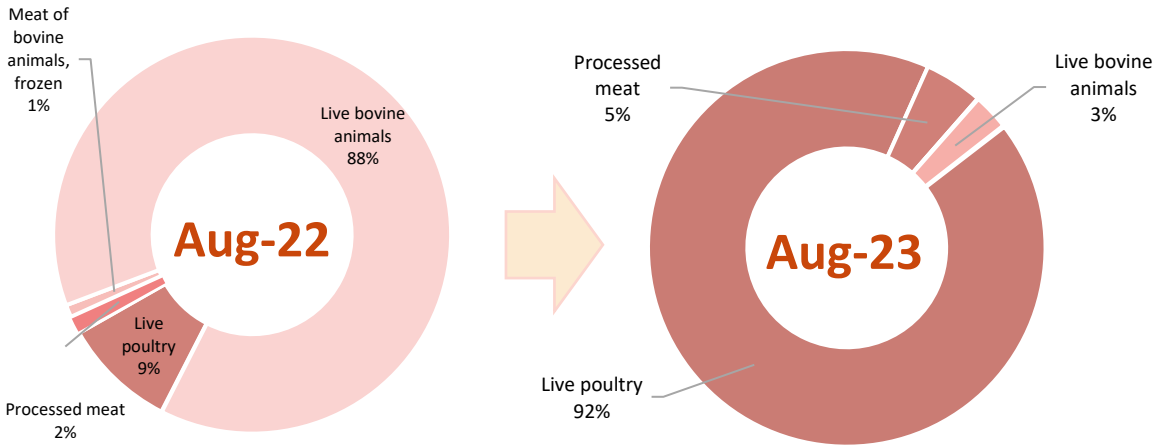


Meat of bovine animals, frozen
 Value: **239** Thousand USD
 Increase **40%** compared to Jul-23
 Increase **907%** compared to Aug-22



Live poultry
 Value: **319** Thousand USD
 Increase **21.4%** so compared to Jul-23
 Increase **19%** compared to Aug-22

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



Export results the ASEAN, Aug-2023



Live poultry
 Value: **2.9** Mil.USD
 Increase **146%** compared to Jul-23
 Increase **80%** compared to Aug-22



Processed meat Value: **149** Thousand USD
 Decrease **29%** compared to Jul-23
 Decrease **36%** compared to Aug-22

Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS

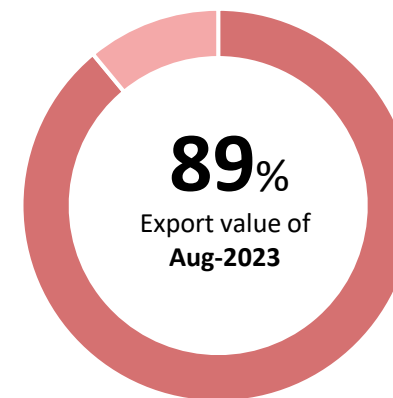
Structure of export value by-products to the ASEAN, Aug-2023



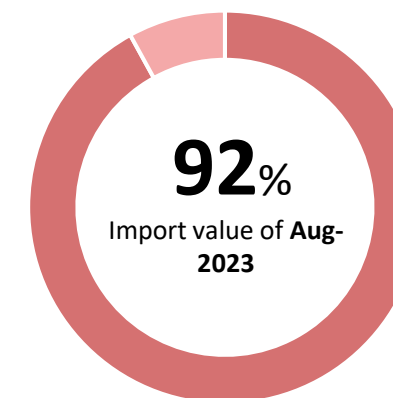
Structure of import value by products the ASEAN, Aug-2023



Import results to the ASEAN, Aug-2023



Export results of the ASEAN, Aug-2023





MEAT & MEAT PRODUCTS

SPOTLIGHT

01

The Asian Infrastructure Investment Bank (AIIB) has signed a \$43 million financing agreement to enhance livestock health in Cambodia. The funding package includes \$33 million in concessional funding from the AIIB and \$10 million from the Pandemic Prevention, Preparedness and Response Facility Trust Fund.

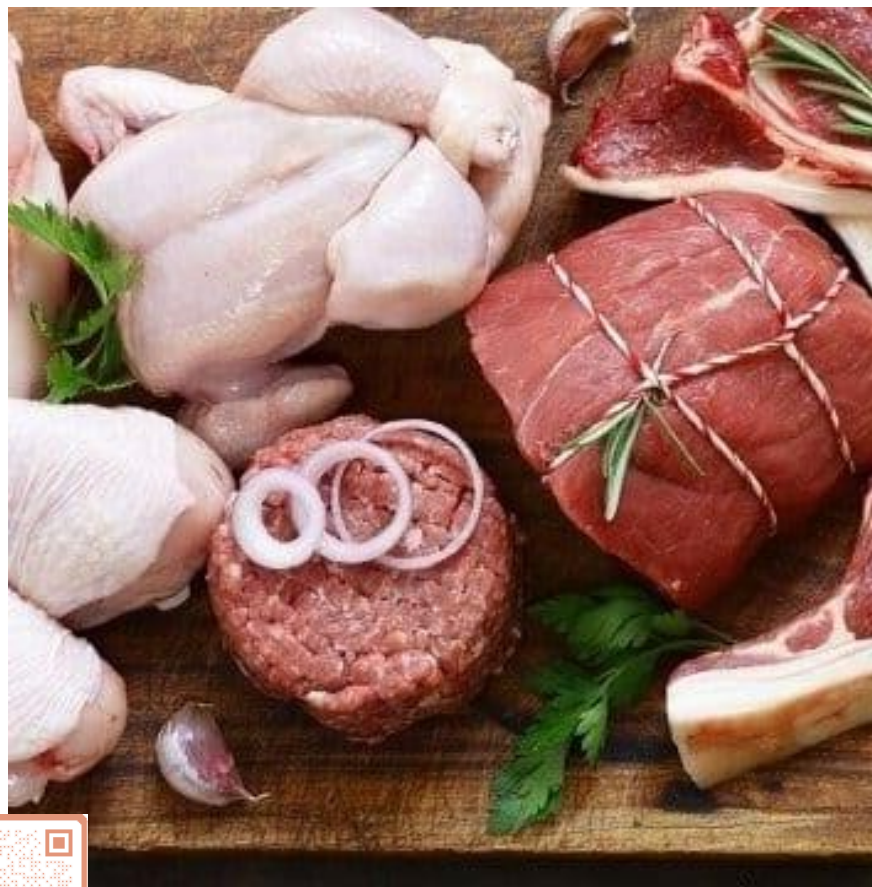
The project aims to improve quality and hygienic animal production and husbandry, enhance the safety and health of animals and humans, and prevent and control infectious diseases.

Source: China.org.cn (9/2023)

02

Indonesia resumed importing live cattle from Australia after months of halting trade due to disease concerns. As a result, Australian livestock producers will be able to continue to trade live buffalo and cattle with Indonesia once additional biosecurity measures have been fully implemented.

Source : Abc.net.au (9/2023)



COMMENTS AND REVIEW

RICE

According to GLE Logistics Company, the opportunity to export rice from now until the end of the year is still tremendous as countries are still increasing rice imports for reserve. In particular, rice production in Malaysia still needs to import up to 30% to ensure domestic consumption and reserve requirements.



COFFEE

According to the Vietnam Coffee-Cocoa Association (VICOFA), Vietnam's coffee output in the 2023 - 2024 crop year is expected to reach about 30 million tons, an increase of 2% compared to the previous crop year. Of which, Robusta coffee output is expected to reach about 26 million tons, an increase of 2.5%, and Arabica coffee output is expected to reach about 4 million tons, an increase of 1.5%.

Coffee exports to the ASEAN market are expected to increase again from November when Vietnam enters the coffee harvest of the 2023 - 2024 crop year (in the fourth quarter of 2023 and the beginning of the first quarter of 2024).



SEAFOOD

According to Vasep, the ASEAN market continues to progress in the last months of the year. However, shrimp, one of the main products, has a sharp decline compared to the beginning of the year and the same period last year, showing that businesses need to continue to improve their ability to compete with cheap shrimp from Ecuador and India.





Any comments, please send to:

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