

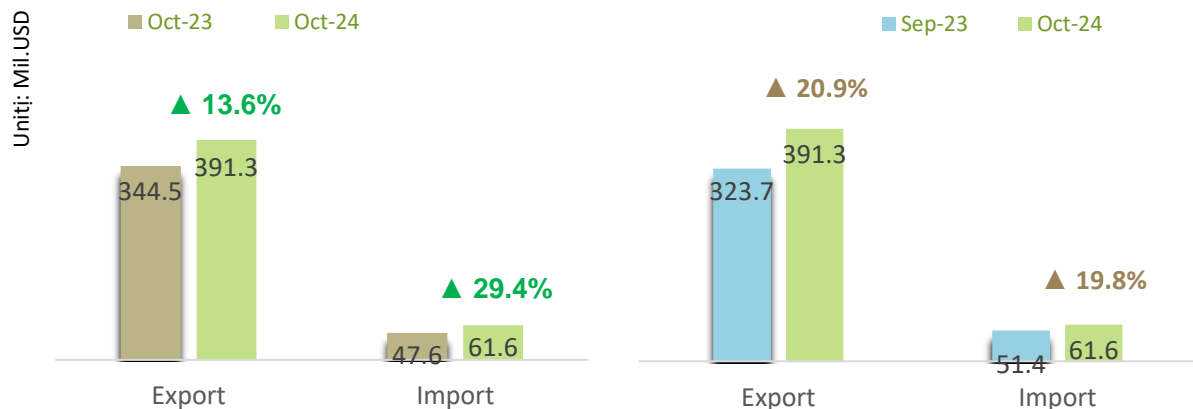
MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

**FROM VIETNAM TO
JAPAN MARKET**

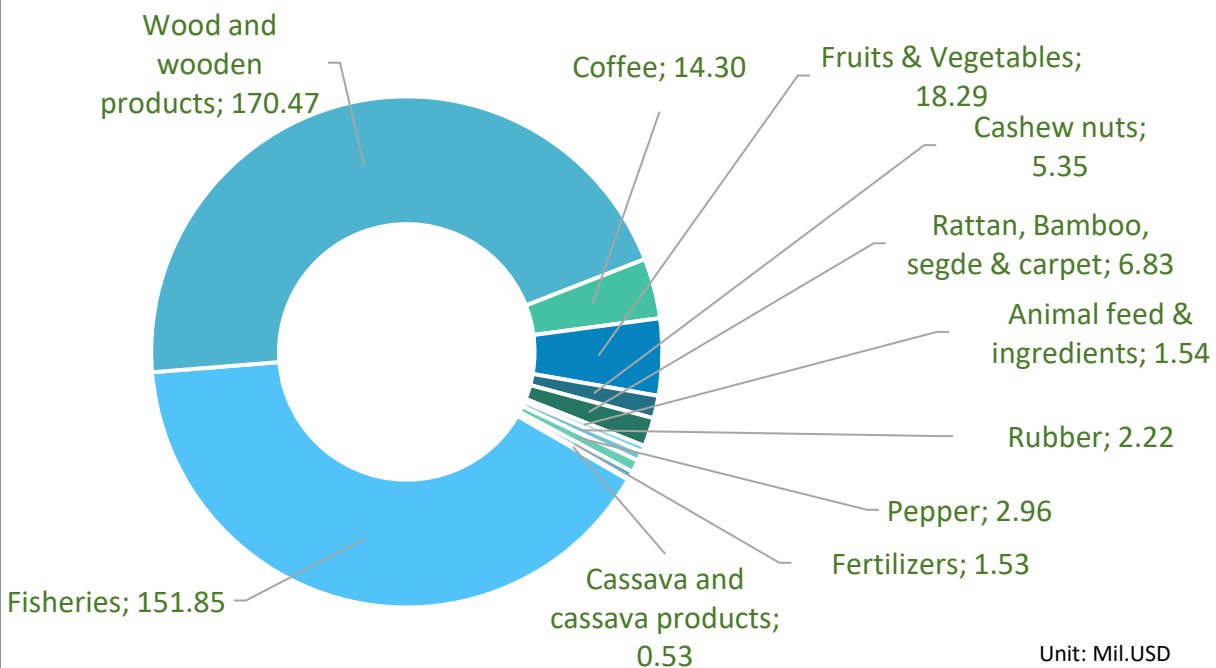


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO JAPAN IN OCTOBER 2024

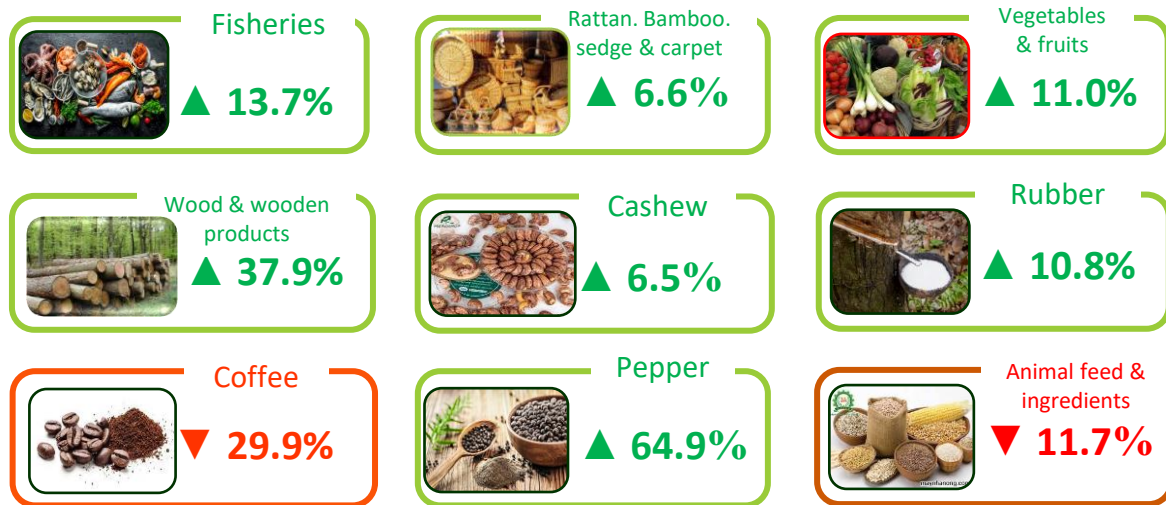
AFF product import-export turnover between Vietnam and Japan, Oct-2024



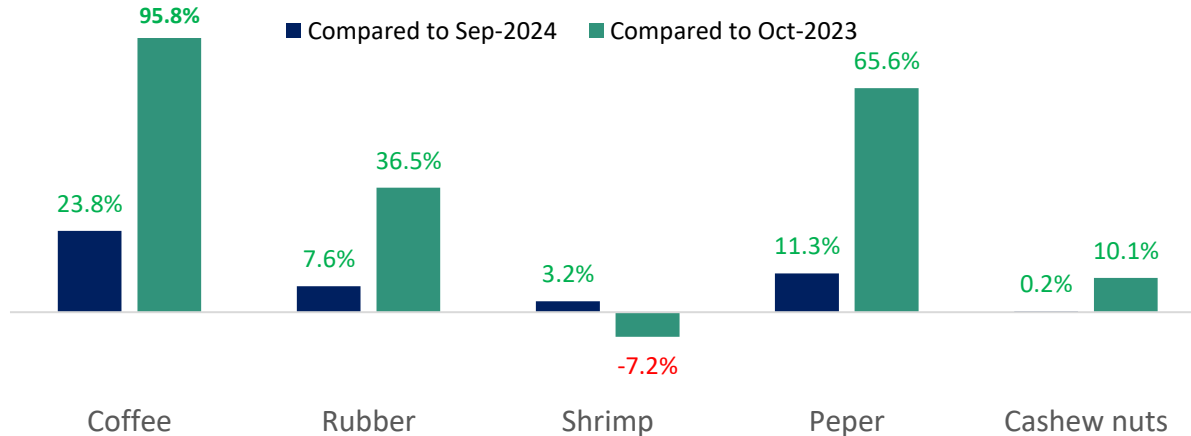
Key AFF product export value to Japan, Oct-2024



Changes in key AFF product export value to Japan, Oct-2024 compared to Sep-2024



Changes in average export value of key AFF products to Japan, Oct-2024 compared to Sep-2024 and Oct-2023



SPOTLIGHTS

Japan Issues Economic Stimulus Package

On November 22, 2024, the Japanese government approved an economic stimulus package worth 39 trillion Yen (approximately USD 253 billion) to mitigate the impact of inflation, ensuring public security, and promoting economic growth.

This stimulus package includes measures to promote sustainable wage increases and investments in the semiconductor and artificial intelligence industries. The government will support low-income households by subsidizing gas and electricity bills starting from January 2025 and commitment to increasing disposable income by raising the tax-exempt income threshold..

Source: CafeF



New Prime Minister's Policies on Agriculture, Forestry, and Fisheries

Prime Minister – Mr Ishiba Shigeru pledged that Japanese government will promote exporting agricultural, forestry, and fishery products and safeguarding domestic production capacity. The government implement measures for fostering a sustainable food industry to ensure a stable and safe food supply for its citizens and developing agricultural, forestry, and fishery sectors in harmony with the environment protection.

Specifically, the government encourages circular and regenerative practices to protect and restore forest resources, boost sustainable timber production, and improve natural forest management and conservation.

In the fisheries sector, the government focuses on transitioning to sustainable fishing and aquaculture practices, applying modern technologies to preserve resources and ensure the long-term development of the fishery sector.

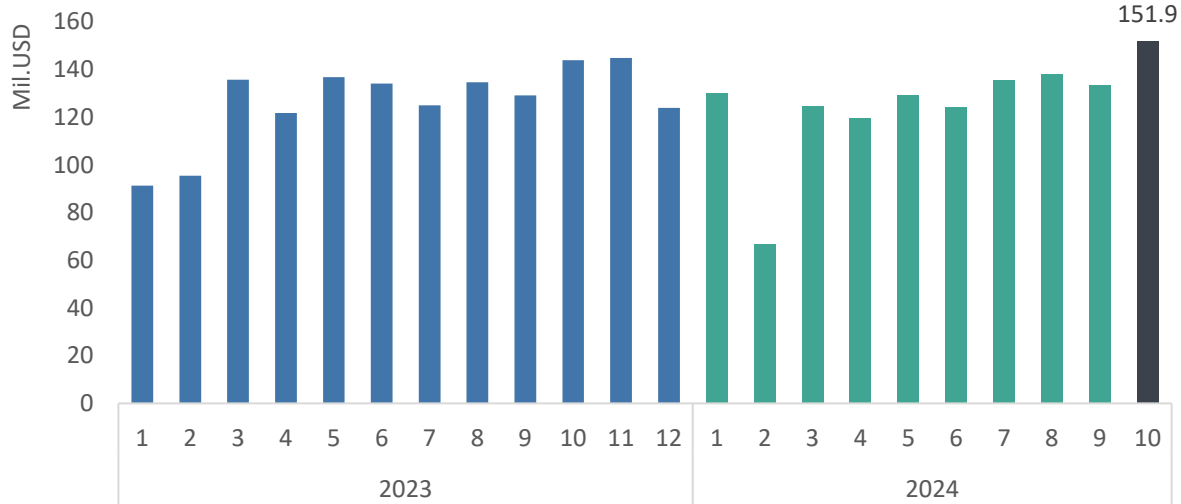
Source: japan.go.jp





FISHERIES

Export value to Japan, Oct-2024



Export results to Japan, Oct-2024

Value
151.9 Mil.USD



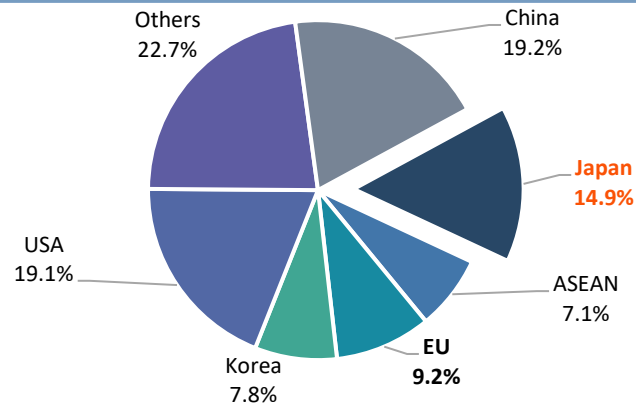
➔ Increase **13.7%** compared to Sep-2024

➔ Increase **5.5%** compared to Oct-2023

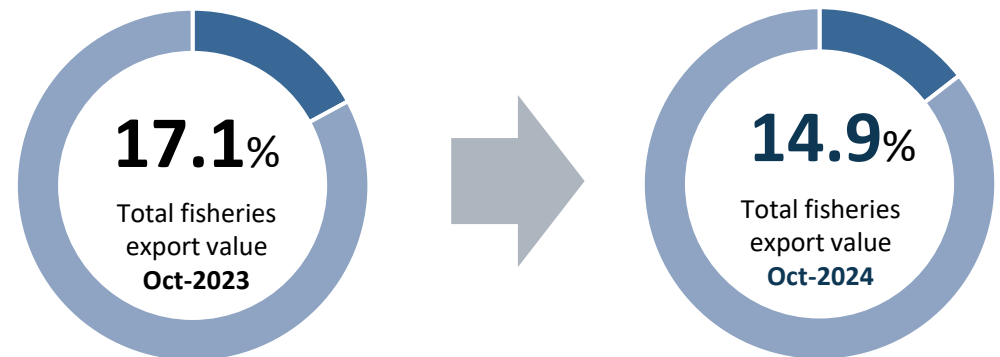
▲ **25.5** Mil.USD higher than monthly average in 2023

❖ Accumulated 10 months 2024 reached **1253.0** Mil.USD, equal to **82.7%** of value in 2023

Percentage of export value to Japan, Oct-2024



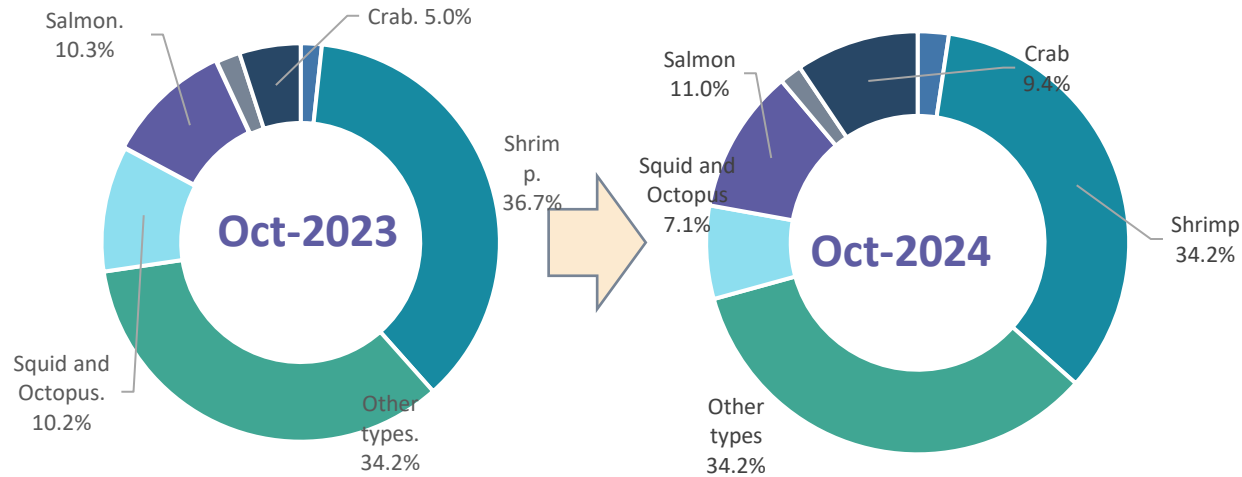
Changes in percentage of export results to Japan, Oct-2024





FISHERIES

Structure of exports by products to Japan, Oct-2024



Export results to Japan, Oct-2024



Salmon

Value: **16.8** Mil.USD

Increase **9.5%** compared to Sep-2024

Increase **13.4%** compared to Oct-2023



Shrimp

Value: **51.9** Mil.USD

Increase **7.2%** compared to Sep-2024

Decrease **1.8%** compared to Oct-2023



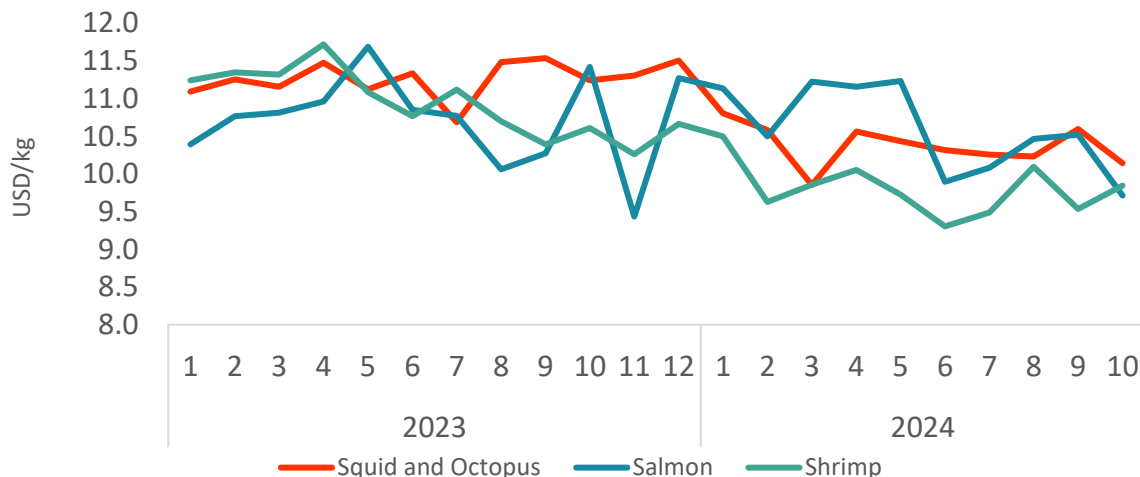
Squid and Octopus

Value: **10.8** Mil.USD

Decrease **3.6%** compared to Sep-2024

Decrease **26.0%** compared to Oct-2023

Average export price to Japan, Oct-2024



Squid and Octopus

The average export price in Oct-2024 is **10.1** USD/kg; decrease **4.3%** compared to the previous month; and decrease **8.1%** compared to the same month of 2023.

Salmon

The average export price in Oct-2024 is **9.7** USD/kg; decrease **7.7%** compared to the previous month; and decrease **14.9%** compared to the same month of 2023.

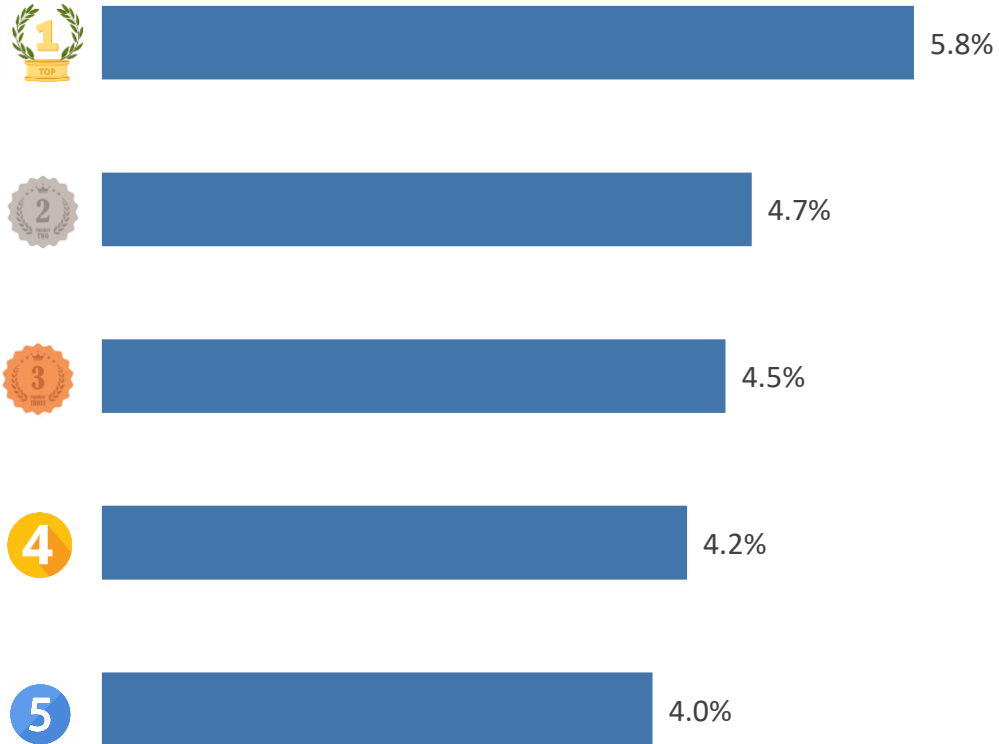
Shrimp

The average export price in Oct-2024 is **9.8** USD/kg; increase **3.2%** compared to the previous month; and decrease **7.2%** compared to the same month of 2023.

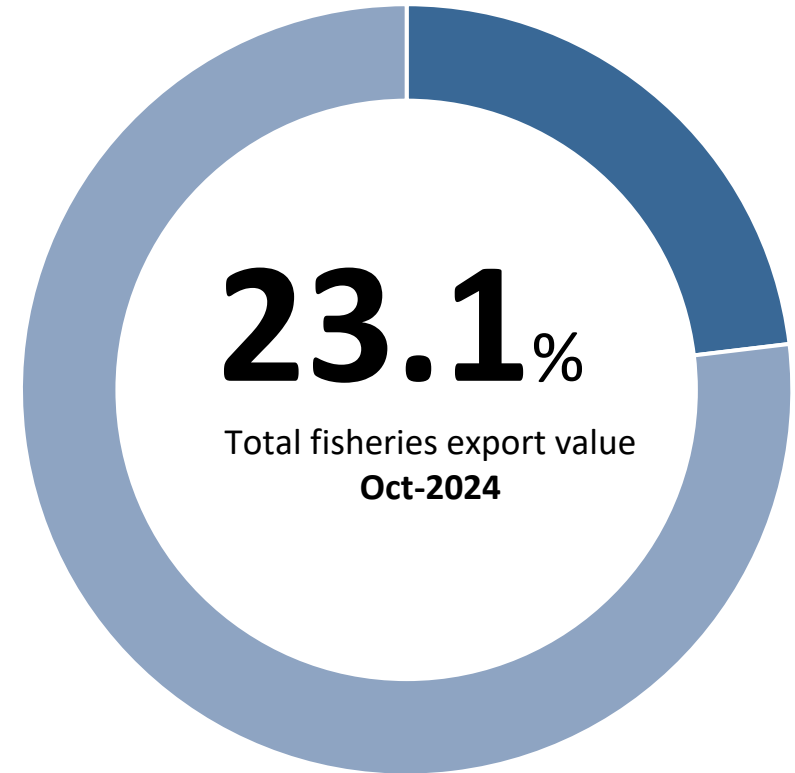


FISHERIES

TOP 5 export enterprises by value to Japan, Oct-2024



Value ratio of TOP 5 export enterprises to Japan, Oct-2024



Japan's Pacific Bluefin Tuna Quotas Increase from 2025

The Western and Central Pacific Fisheries Commission (WCPFC) decided to increase Japan's Pacific bluefin tuna quotas from 2025. Japan's quota for large bluefin tuna (over 30 kg) and for smaller bluefin tuna will increase by 50% and 10%, respectively. This decision followed a meeting of the WCPFC Northern Committee in Kushiro, Hokkaido, in July and was officially approved at the annual meeting in Fiji.

In recent years, the Pacific bluefin tuna population has recovered so that Japan sent a request to increase its fishing quota. The new quotas will be at 8,421 tons for large bluefin tuna and 4,407 tons for smaller tuna. The WCPFC also decided to review these quotas again in 2026..

Source: Japantimes

Leading Japanese Seafood Corporation Invests in Processing Facility in Vietnam

Kyokuyo Corporation, one of Japan's top three seafood processing companies, invested USD 12.65 million in establishing a processing facility in Long An Province, Vietnam. The facility will produce crab and fish fillets, with an expected annual capacity of 5,000 tons and create approximately 800 jobs. Most of the products will be exported back to Japan and other Southeast Asian markets.

This is a strategic action to diversify Kyokuyo's supply chain and reduce its dependence on the Chinese market, following China's seafood import ban related to the Fukushima incident. The processing facility will begin to operate in February 2025.

Source: kinhthedoithi





FRUITS & VEGETABLES (EXPORT)

Export value to Japan, Oct-2024



Export results to Japan, Oct-2024

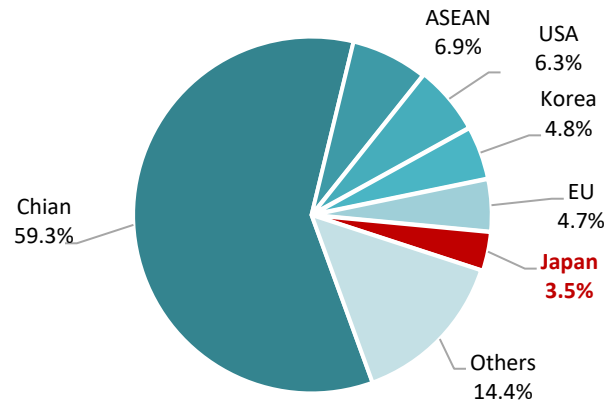
Value
18.3
Mil.USD

Increase **11.0%** compared to Sep-2024

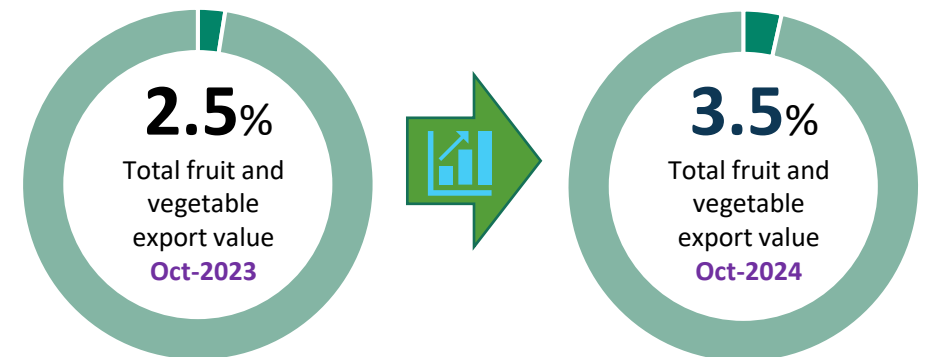
Increase **19.8%** compared to Oct-2023
3.6 Mil.USD higher than monthly average in 2023

Accumulated 10 months 2024 reached **170.3 Mil.USD**, equal to **96.7%** of value in 2023

Percentage of export value to Japan, Oct-2024



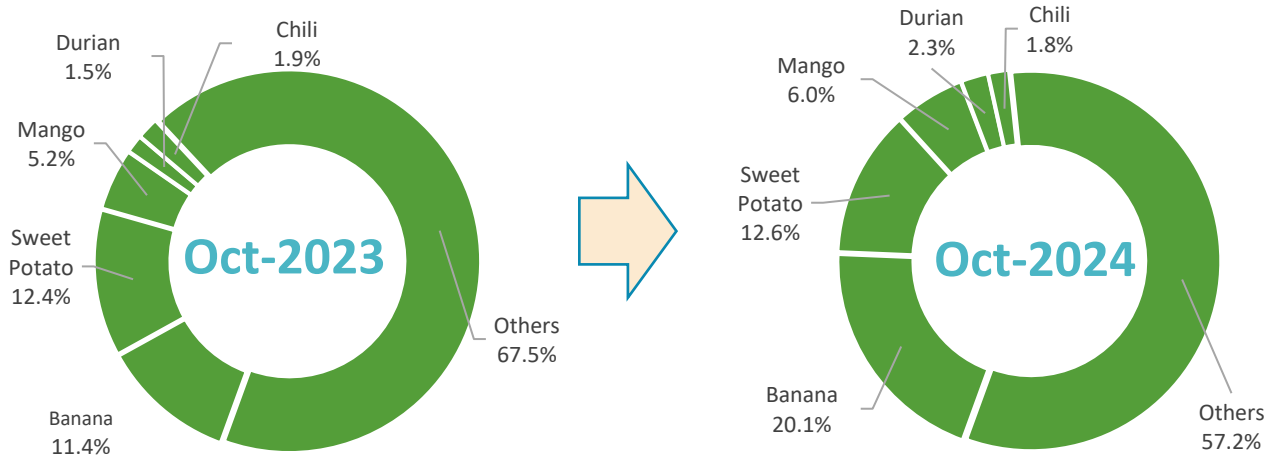
Changes in percentage of export results to Japan, Oct-2024





FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to Japan, Oct-2024



Export results to Japan, Oct-2024



Banana

Value: **3.7** Mil.USD

Increase **17.0%** compared to Sep-2024

Increase **111.1%** compared to Oct-2023



Sweet Potato

Value: **2.3** Mil.USD

Increase **14.5%** compared to Sep-2024

Increase **21.3%** compared to Oct-2023



Mango

Value: **1.1** Mil.USD

Increase **3.8%** compared to Sep-2024

Increase **36.3%** so compared to Oct-2023



Durian

Value: **0.43** Mil.USD

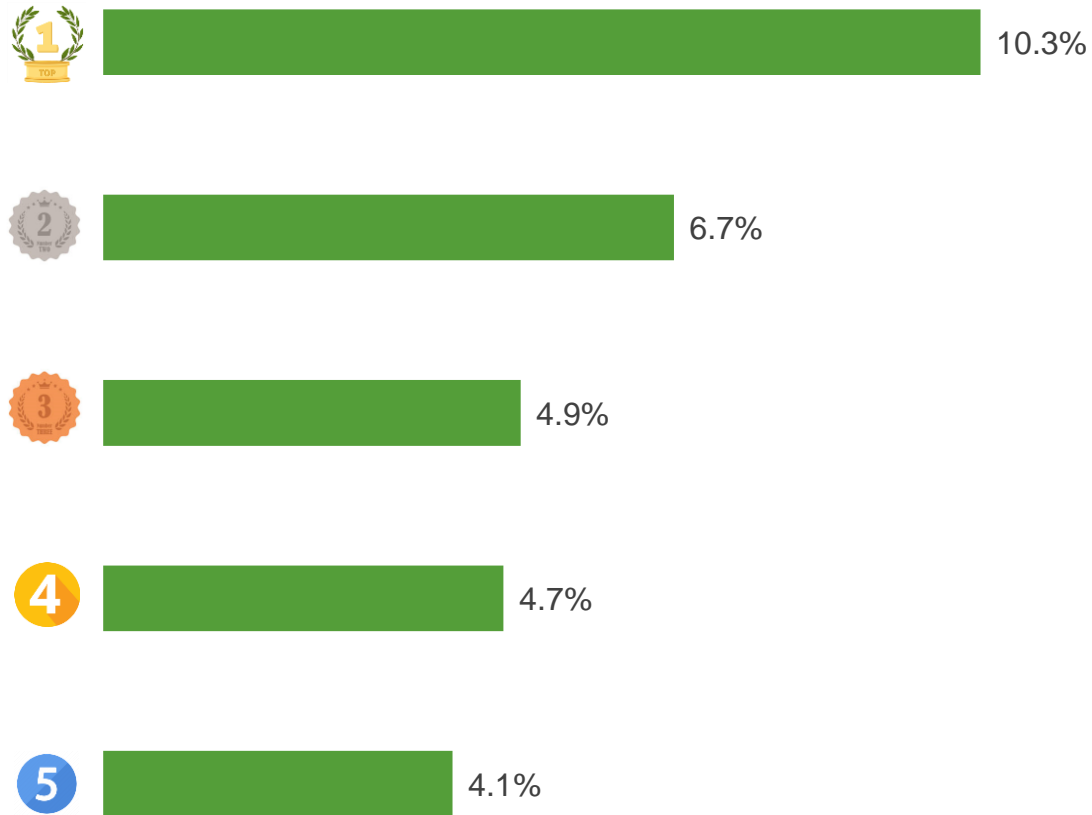
Increase **56.4%** compared to Sep-2024

Increase **81.7%** compared to Oct-2023

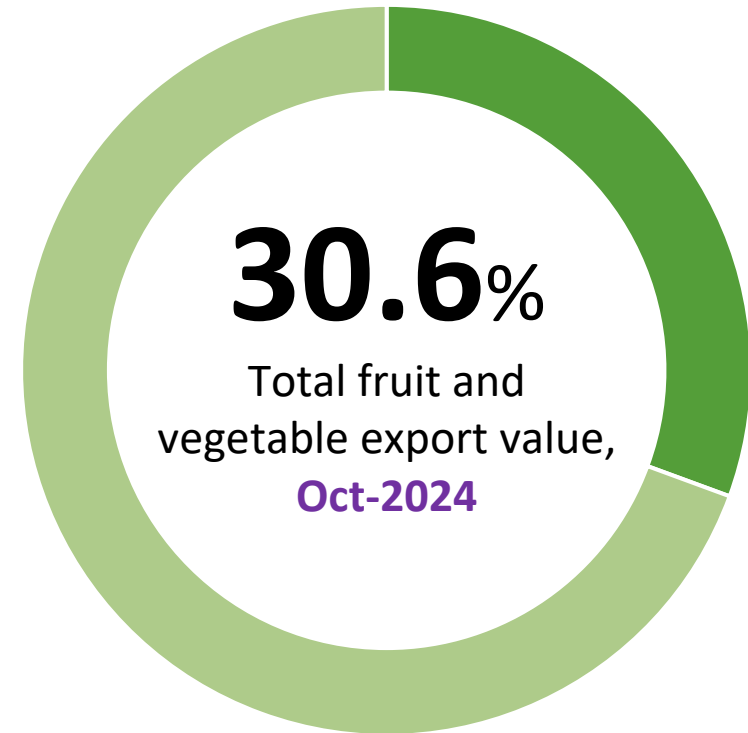


FRUITS & VEGETABLES (EXPORT)

TOP 5 export enterprises by value to Japan, Oct-2024



Value ratio of TOP 5 export enterprises to Japan, Oct-2024





FRUITS & VEGETABLES (IMPORT)

Import value from Japan, Oct-2024



Import results from Japan, Oct-2024

Value



0.5

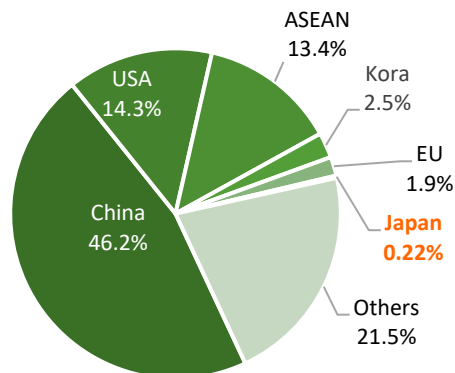
Mil.USD

Decrease **28.5%** compared to Sep-2024

Decrease **18.4%** compared to Oct-2023
lower **73.5 Thous.USD** than monthly average in 2023

Accumulated 10 months 2024 reached **4.7 Mil.USD**, equal to **71.0%** of value in 2023

Percentage of import value from Japan, Oct-2024



Changes in percentage of import results from Japan, Oct-2024





01

Japan Opens Market for Philippines' Hass Avocados

Japan approved to import Hass avocados from Philippines, following previous approvals for bananas and pineapples. As a major importer of Hass avocados, Japan recorded an import value of USD 160 million (61,000 tons) in 2023. Key suppliers of Hass avocados to Japan include Mexico, Peru, Australia, New Zealand, and the United States..

Source: Fruitnet.com

02

Japan's Pear Production is Declining

The cultivated area and production of pears in Japan decreased by 20% and 30%, respectively, over the past decade. The main reason is due to an aging agricultural population—many farmers are over 65 years old—and a 40% reduction in the number of farmers. Additionally, global warming has increasingly impacted autumn pear varieties like Niitaka, which are more susceptible to high temperatures.

In response to climate change, researchers at Tottori University are crossbreeding Japanese pears with Taiwanese varieties to develop heat-resistant pear varieties. However, these new varieties require many years of piloting before they can be introduced into production..

Source: Freshplaza.com



COFFEE

Export value and volume to Japan, Oct-2024



Export results to Japan, Oct-2024

Value

14.3 Mil.USD

↘ Decrease **29.9%** compared to Sep-2024

↘ Decrease **10.9%** compared to Oct-2023

↘ **12.2** Mil.USD lower than monthly average in 2023

❖ Accumulated 10 months 2024 reached **341.4** Mil.USD, equal to **102.8%** of value in 2023

Volume

2 thous.tons

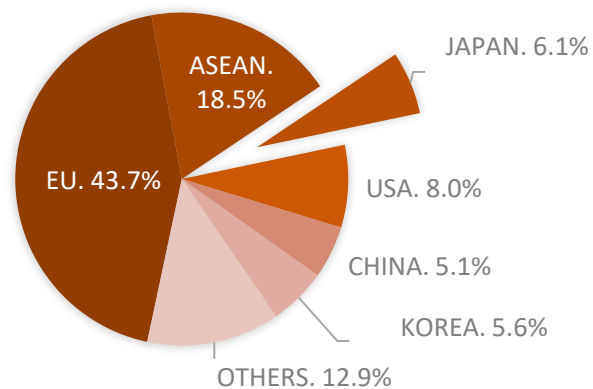
↘ Decrease **43.4%** compared to Sep-2024

↘ Decrease **54.5%** compared to Oct-2023

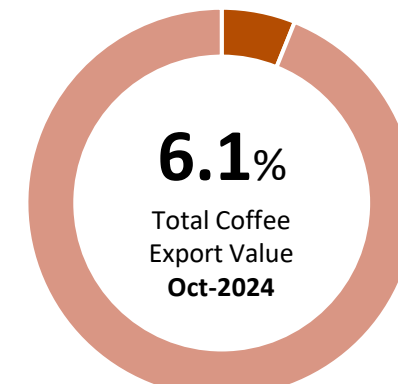
↘ **7.3** thous.tons lower than monthly average in 2023

❖ Accumulated 10 months 2024 reached **80.8** thous.tons, equal to **73%** of volume in 2023

Percentage of export value to Japan, Oct-2024

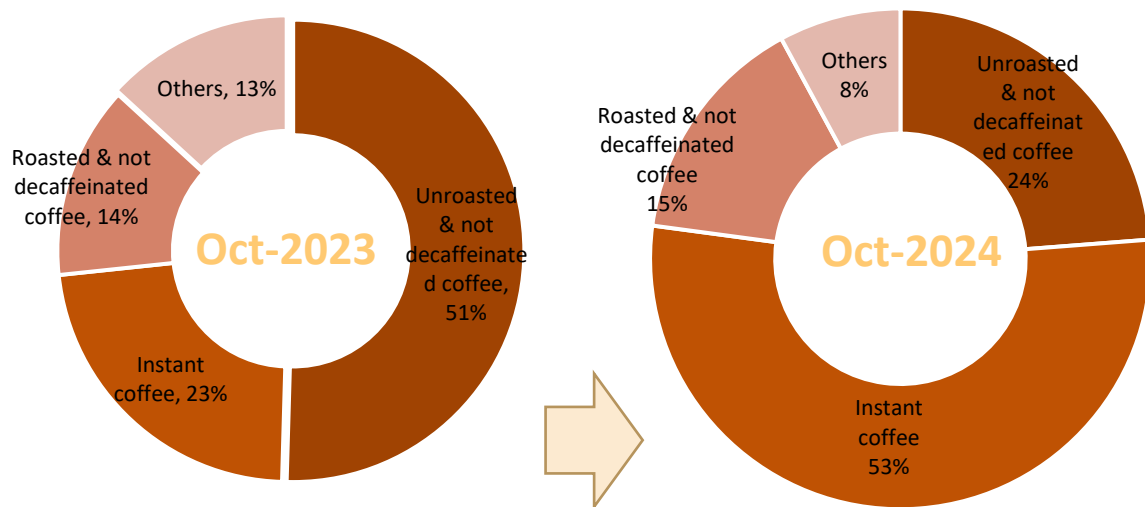


Changes in percentage of export results to Japan, Oct-2024

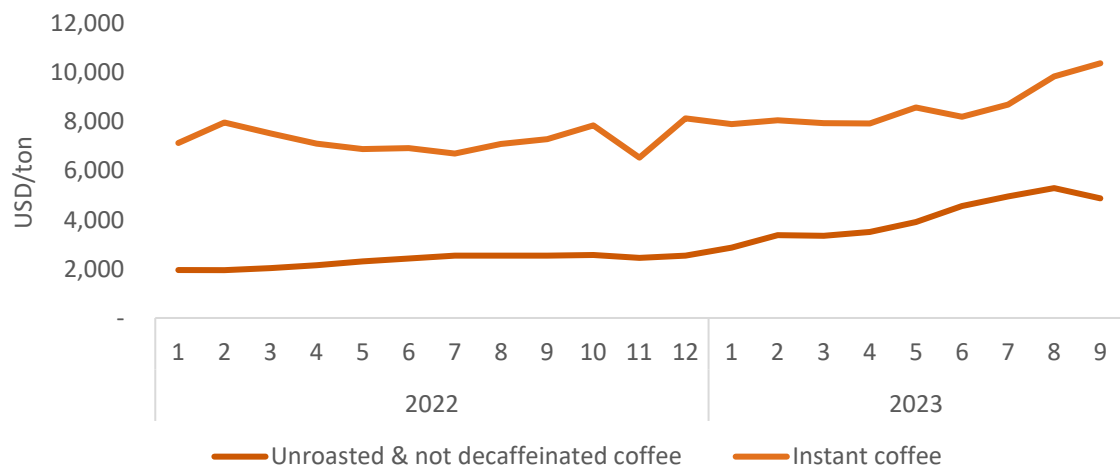


COFFEE

Structure of exports by products to Japan, Oct-2024



Average export price to Japan, Oct-2024



Export results to Japan, Oct-2024



Unroasted & not decaffeinated coffee

Value: **3.2** Mil.USD
 Decrease **73.5%** compared to Sep-2024
 Decrease **58.5%** compared to Oct-2023



Instant coffee

Value: **7.2** Mil.USD
 Increase **78.7%** so compared to Sep-2024
 Increase **104%** compared to Oct-2023



Roasted & not decaffeinated coffee

Value: **2** Mil.USD
 Increase **2.9%** compared to Sep-2024
 Decrease **2.6%** compared to Oct-2023

Instant coffee

The average export price in Oct-2024 is **12,483** USD/ton. Increase **20.3%** compared to the previous month; and Increase **88.5%** compared to the same month of 2023.

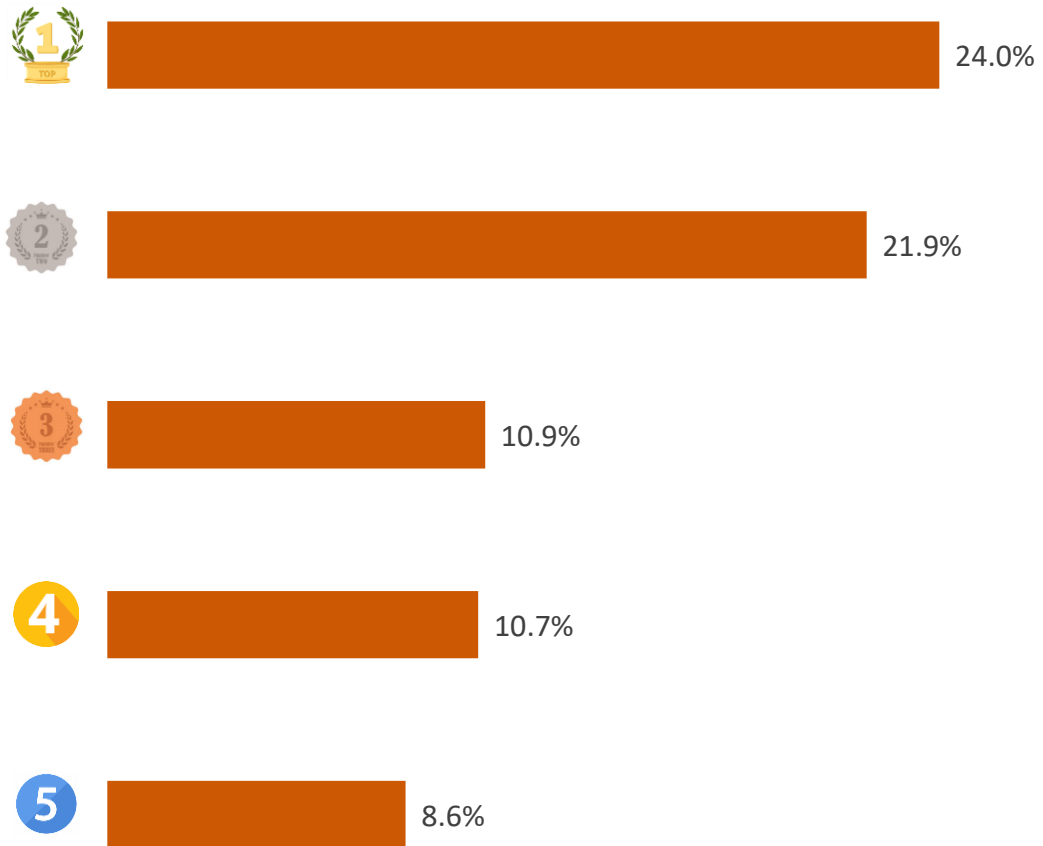
Unroasted & not decaffeinated coffee

The average export price in Oct-2024 is **5,294** USD/ton; Increase **8.6%** compared to the previous month; and Increase **106%** compared to the same month of 2023.

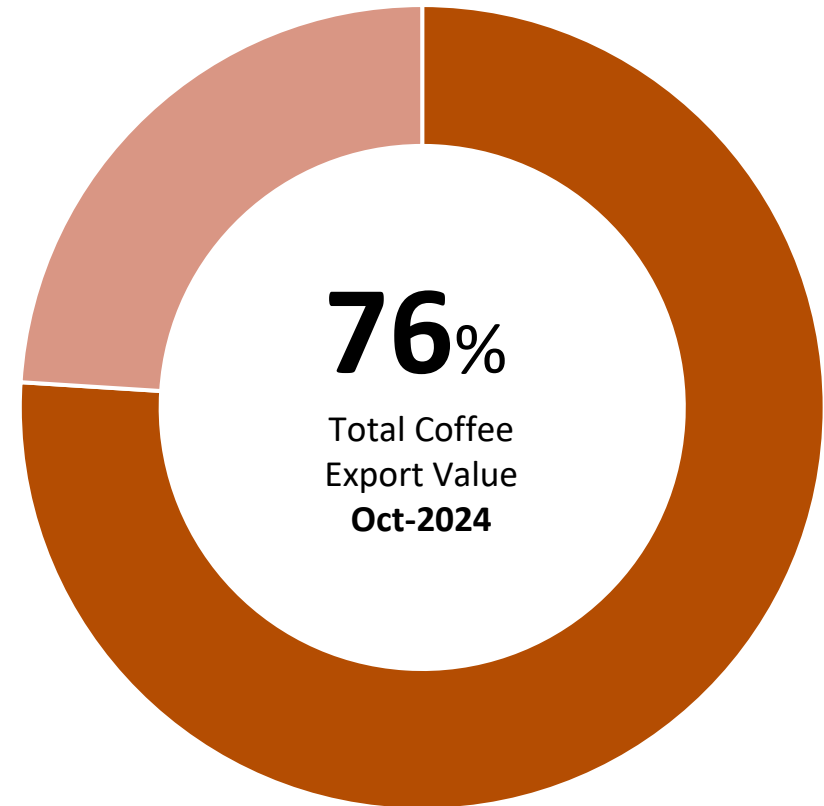


COFFEE

TOP 5 export enterprises by value to Japan, Oct-2024



Value ratio of TOP 5 export enterprises to Japan, Oct-2024





Decaffeinated coffee is more popular in Japan. Currently, cafés in Tokyo offer decaffeinated and half-caFFEinated coffee options to cater to consumers seeking healthier coffee choices. This trend allows customers to manage their caffeine intake and avoid side effects like insomnia or stomach discomfort.

CHOOZE COFFEE cooperated with Tohoku University to apply technology to remove caffeine while preserving flavor, many customers. A research study revealed that many consumers are interested in controlling caffeine level. Additionally, Nescafé Gold Blend has introduced a half-caFFEine coffee products to meet this new trend in Japan market.

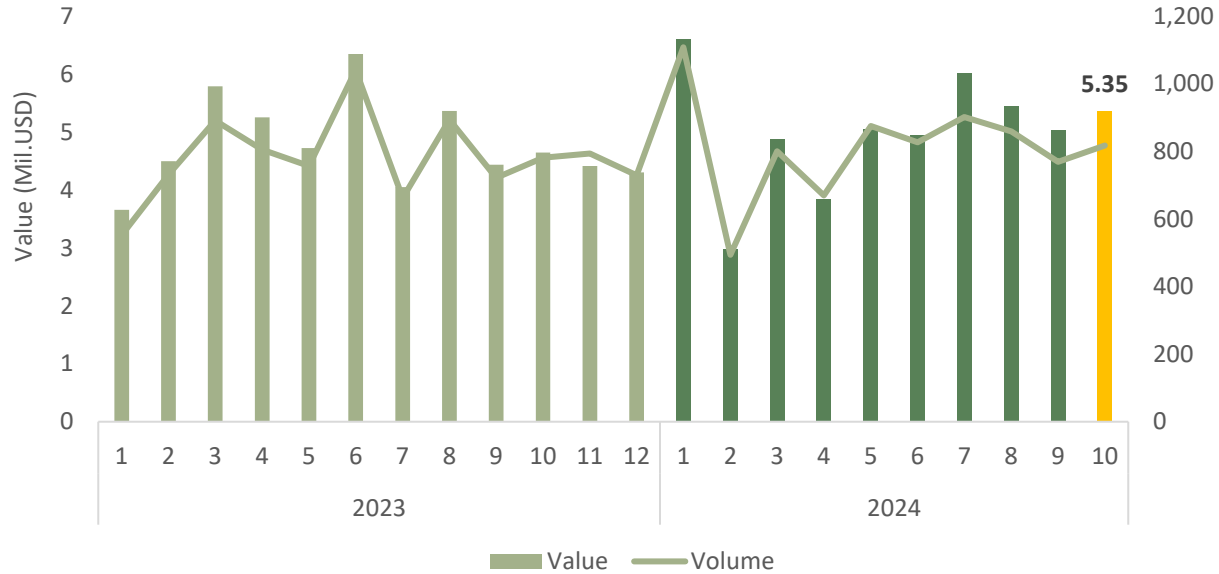
Source: japan-forward.com (11/2024)





CASHEW NUTS

Export value and volume to Japan, Oct-2024



Export results to Japan, Oct-2024

Value

5.35 Mil.USD

↗ Increase **6.5%** compared to Sep-2024

↗ Increase **15.2%** compared to Oct-2023

↑ **0.56 Mil.USD** higher than monthly average in 2023

❖ Accumulated 10 months 2024 reached **50 Mil.USD**, equal to **87%** of value in 2023

Volume

817 tons

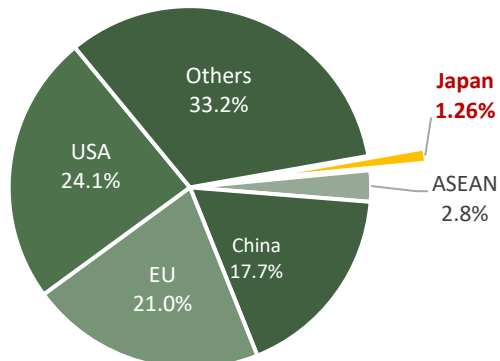
↘ Decrease **6.2%** compared to Sep-2024

↗ Increase **4.2%** compared to Oct-2023

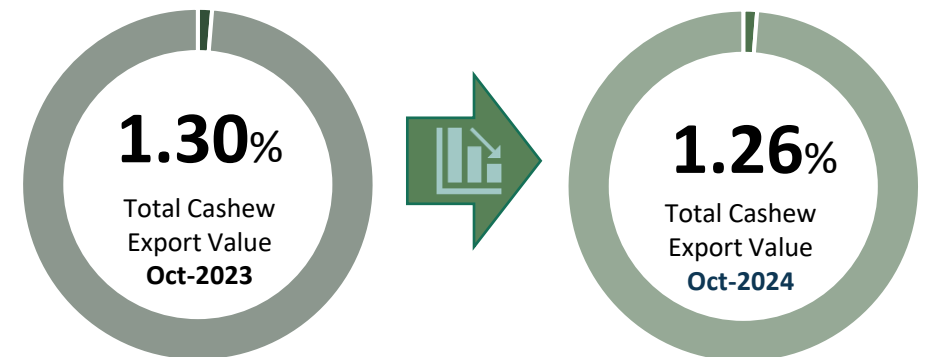
↑ **37 tons** higher than monthly average in 2023

❖ Accumulated 10 months 2024 reached **8.1 thous.tons**, equal to **87%** of volume in 2023

Percentage of export value to Japan, Oct-2024



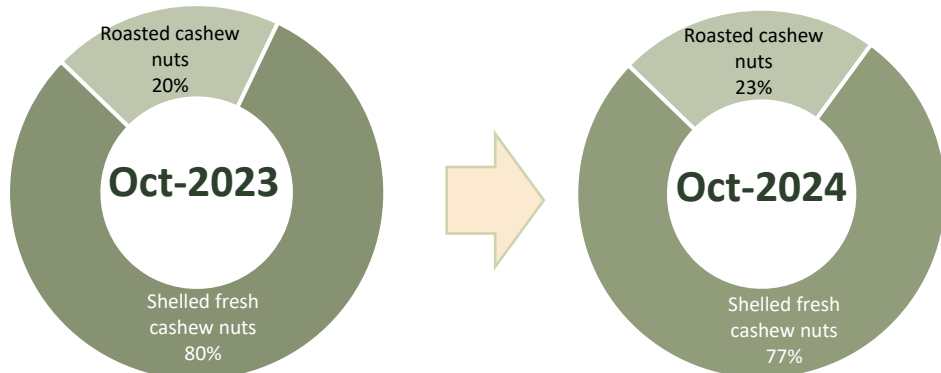
Changes in percentage of export results to Japan, Oct-2024



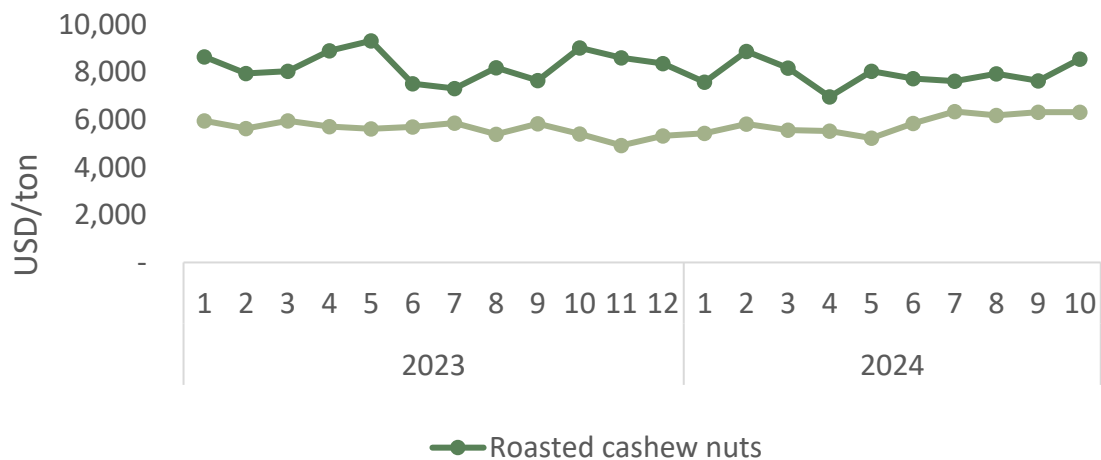


CASHEW NUTS

Structure of exports by products to Japan, Oct-2024



Average export price to Japan, Oct-2024



Export results to Japan, Oct-2024



Shelled fresh cashew nuts

Value: **4.18** Mil.USD

Increase **14%** compared to Sep-2024

Increase **12%** compared to Oct-2023



Roasted cashew nuts

Value: **1.24** Mil.USD

Decrease **8.4%** compared to Sep-2024

Increase **34%** compared to Oct-2023

Shelled fresh cashew nuts

The average export price in Oct-2024 is **6.317** USD/ton; increase **0.02%** compared to the previous month; and increase **17%** compared to the same month of 2023.

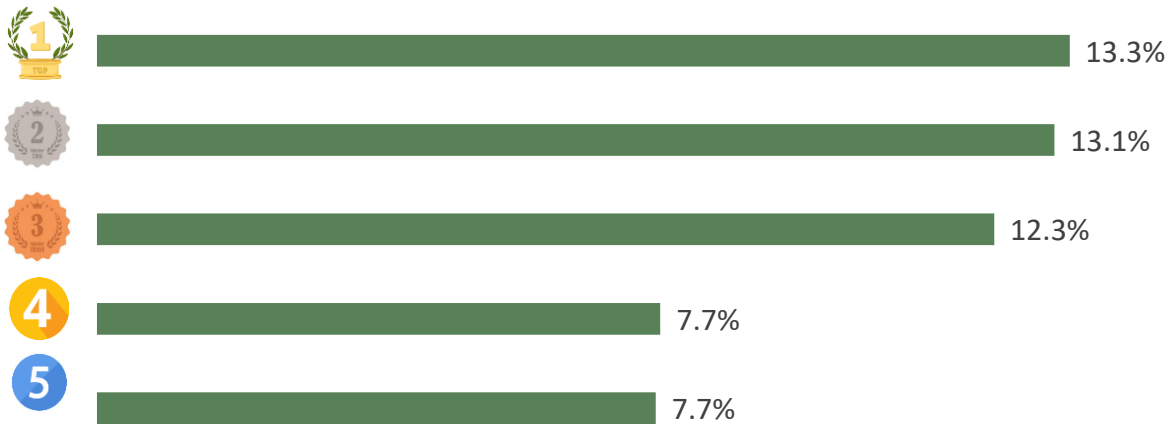
Roasted cashew nuts

The average export price in Oct-2024 is **8.544** USD/ton; increase **12%** compared to the previous month; and decrease **5.2%** compared to the same month of 2023.

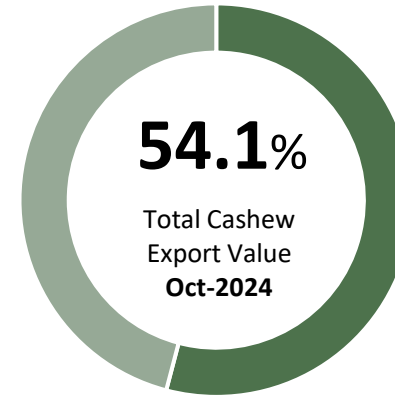


CASHEW NUTS

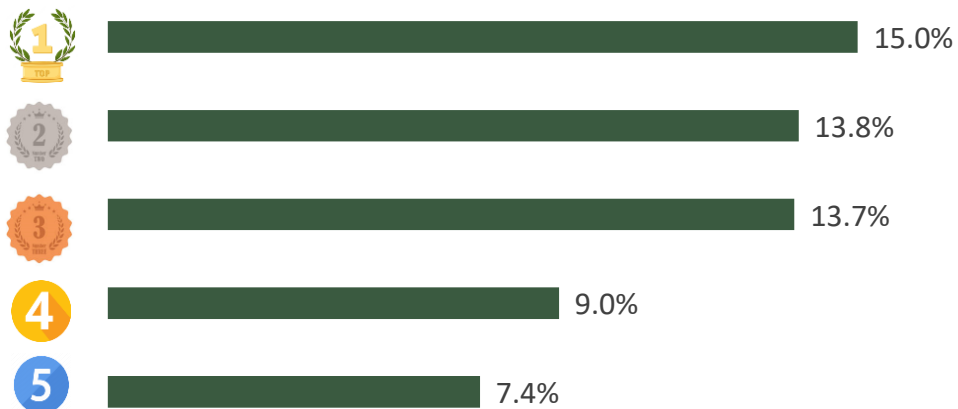
TOP 5 export enterprises by value to Japan, Oct-2024



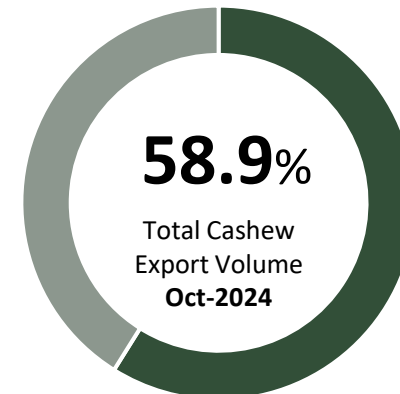
Value ratio of TOP 5 export enterprises to Japan, Oct-2024



TOP 5 export enterprises by volume to Japan, Oct-2024



Volume ratio of TOP 5 export enterprises to Japan, Oct-2024



CASHEW NUTS

SPOTLIGHTS



Japan Considers Mandatory Allergen Labeling for Cashew Nuts

The Consumer Affairs Agency of Japan is considering to add cashew nuts to the list of products requiring mandatory allergen warnings on packaging, following a rise in allergy cases associated with their consumption.

Last year, cashew nuts were reason of 279 in total 6,033 allergy cases, representing 4.6% of incidents, making them become the seventh most common allergenic food. This marks a significant increase from 0.6% in a 2012 survey, when cashews ranked 14th among allergenic foods.

Japan's Digital Agency has plan to establish an expert council at the end of March next year to discuss the proposed mandatory labeling for cashew nuts.

Source: Japan Digital Ministry





WOOD AND WOODEN PRODUCTS

Export value to Japan, Oct-2024



Export results to Japan, Oct-2024



170

Mil.USD

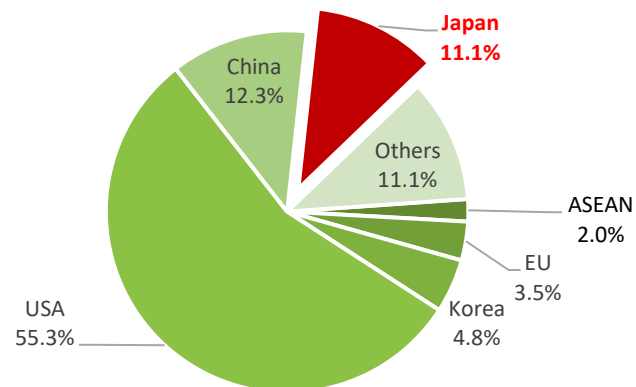
➔ Increase **37.9%** compared to Sep-2024

➔ Increase **26.7%** compared to Oct-2023

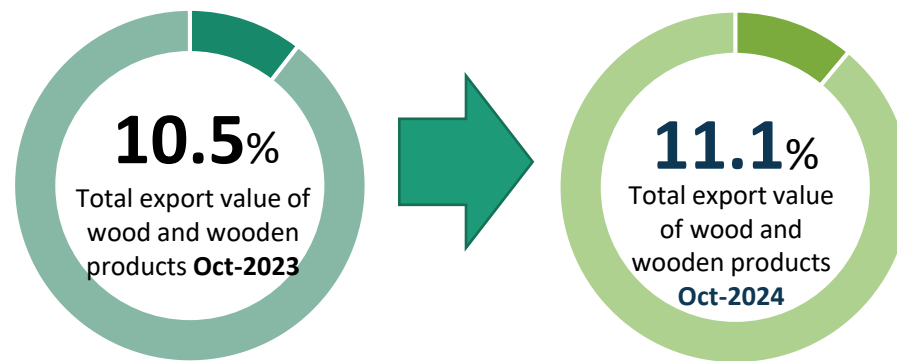
➔ **30.6 Mil.USD** higher than monthly average in 2023

❖ Accumulated 10 months 2024 reached **1.4 Bil. USD**, equal to **84.7%** of value in 2023

Percentage of export value to Japan, Oct-2024



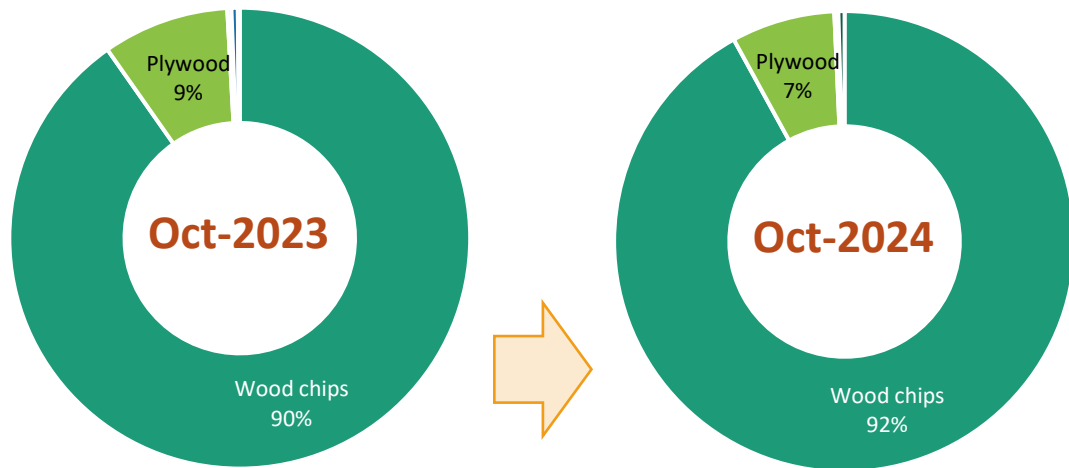
Changes in percentage of export results to Japan, Oct-2024





WOOD AND WOODEN PRODUCTS

Structure of exports by products to Japan, Oct-2024



Export results to Japan, Oct-2024



Wood chips

Value: **110.9** Mil.USD

Increase **52%** compared to Sep-2024

Increase **43%** compared to Oct-2023



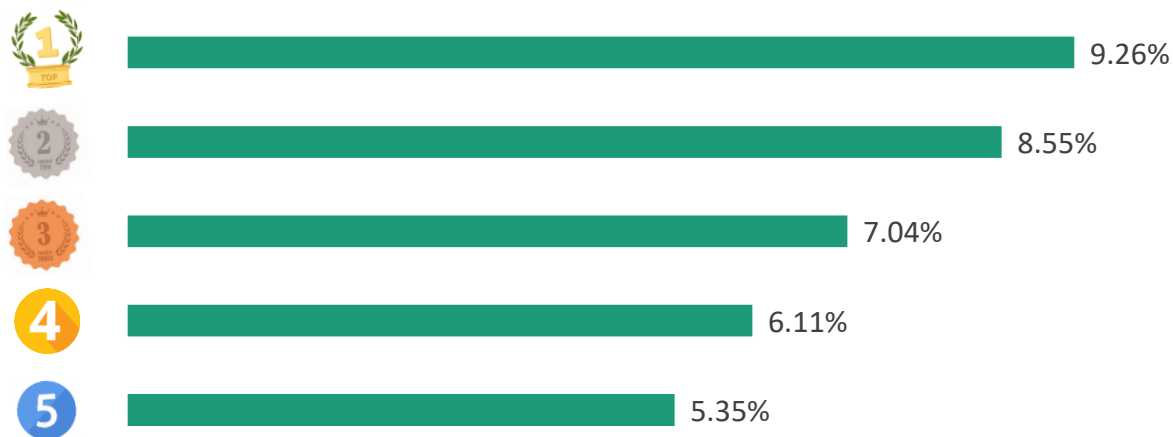
Plywood

Value: **8.8** Mil.USD

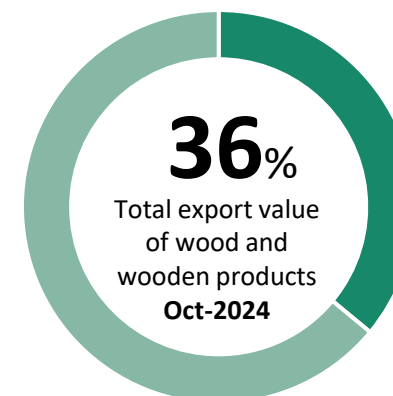
Increase **48%** compared to Sep-2024

Increase **15%** compared to Oct-2023

TOP 5 export enterprises by value to Japan, Oct-2024



Value ratio of TOP 5 export enterprises to Japan, Oct-2024





WOOD AND WOODEN PRODUCTS

SPOTLIGHTS



In September 2024, the import value of assembled wood flooring (HS441871-79) in Japan increased by 14% compared to the previous month but declined by 9% year-on-year. Among these, HS441875 was the largest imported category, accounting for 73% of the total import value, followed by HS441879 (16%) and HS441873 (9%)..

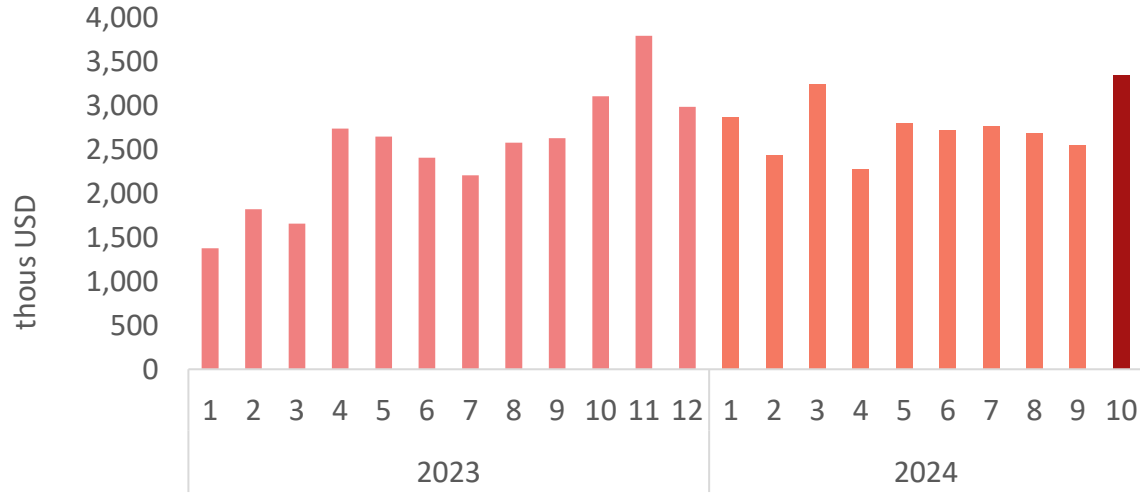
Meanwhile, the import volume of plywood (HS441210-39) remained steady at 130,998 m³ compared to August 2024 but decreased by 8% year-on-year. In September, plywood imports from China and Vietnam declined compared to the previous month, while imports from Malaysia unchanged.





MEAT AND MEAT PRODUCTS

Export value to Japan, Oct-2024



Export results to Japan, Oct-2024



3.35
Mil.USD

Value

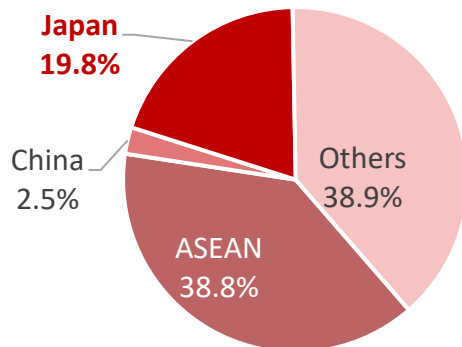
↗ Increase **31.4%** compared to Sep-2024

↗ Increase **7.6%** compared to Oct-2023

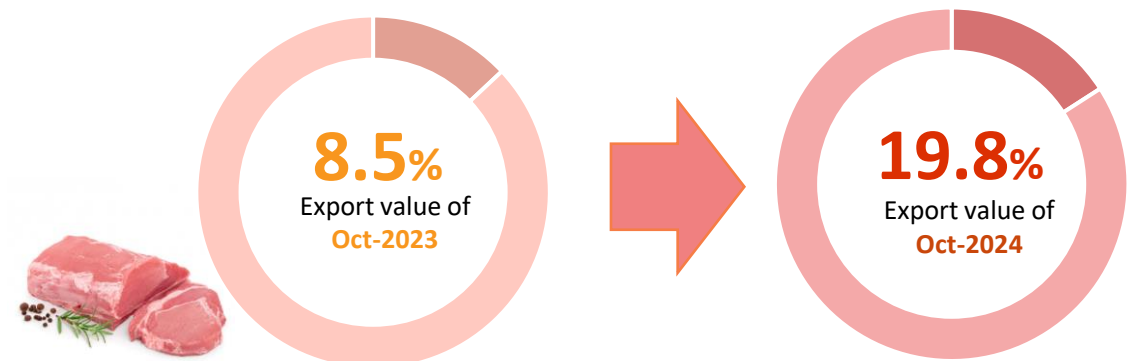
↗ **849.9** Thous.USD higher than monthly average in 2023

◇ Accumulated 10 months 2024 reached **27.7** Mil.USD, equal to **92.4%** of value in 2023

Percentage of export value to Japan, Oct-2024



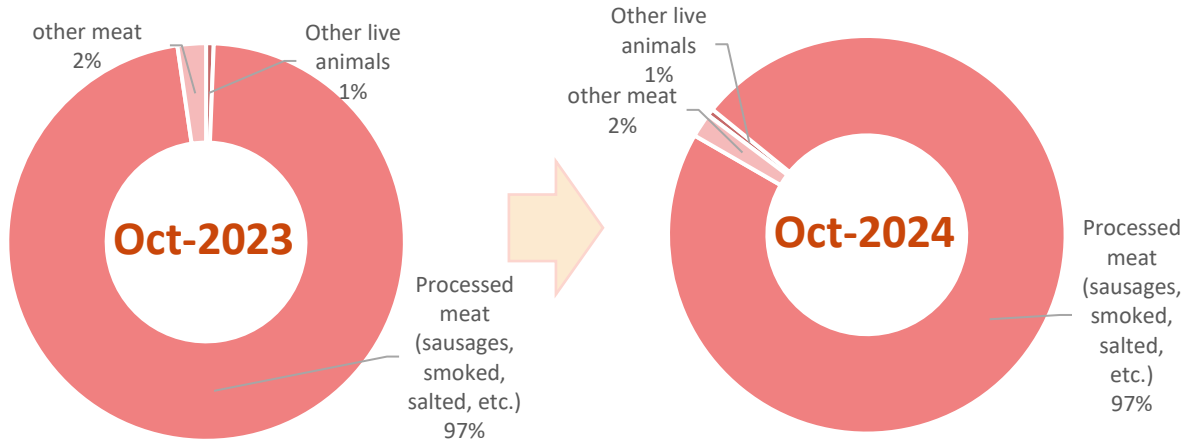
Changes in percentage of export results to Japan, Oct-2024





MEAT AND MEAT PRODUCTS

Structure of exports by products to Japan, Oct-2024



Export results to Japan, Oct-2024



Processed meat (sausages, smoked, salted, etc.)

Value: **3.365** Mil.USD

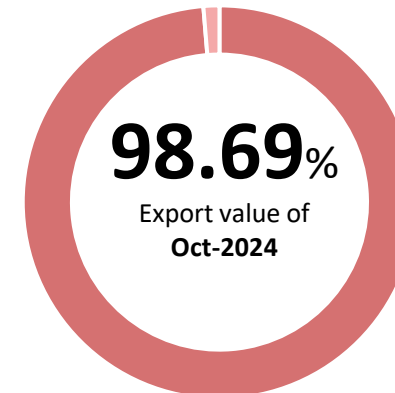
Increase **30.8%** compared to Sep-2024

Increase **8.1%** compared to Oct-2023

TOP 5 export enterprises by value to Japan, Oct-2024



Value ratio of TOP 5 export enterprises to Japan, Oct-2024





Any comments, please send to:

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