

Volume: Jan-2024



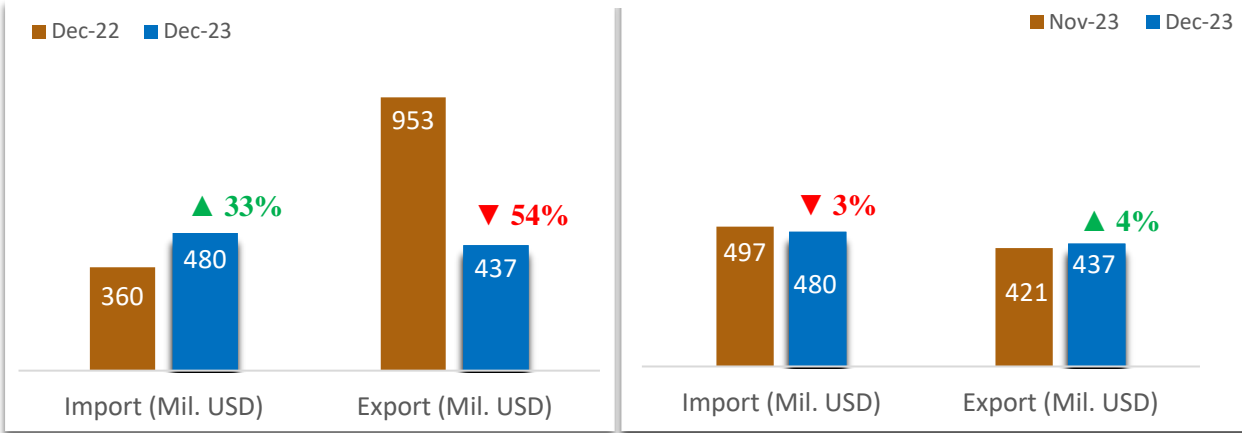
## MONTHLY REPORT ON AGRI-PRODUCT EXPORT

## FROM VIETNAM TO ASEAN MARKET

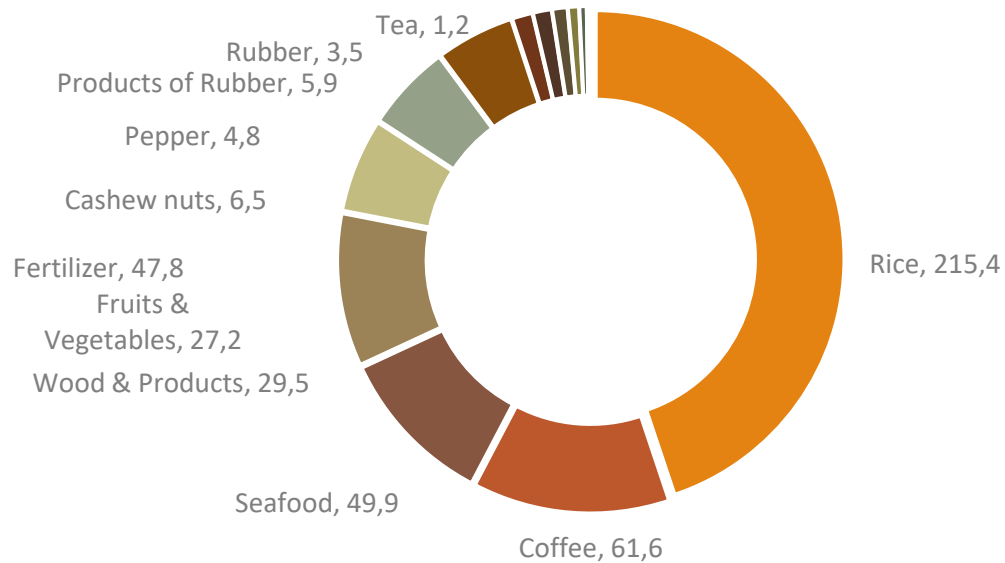


# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN DECEMBER 2023

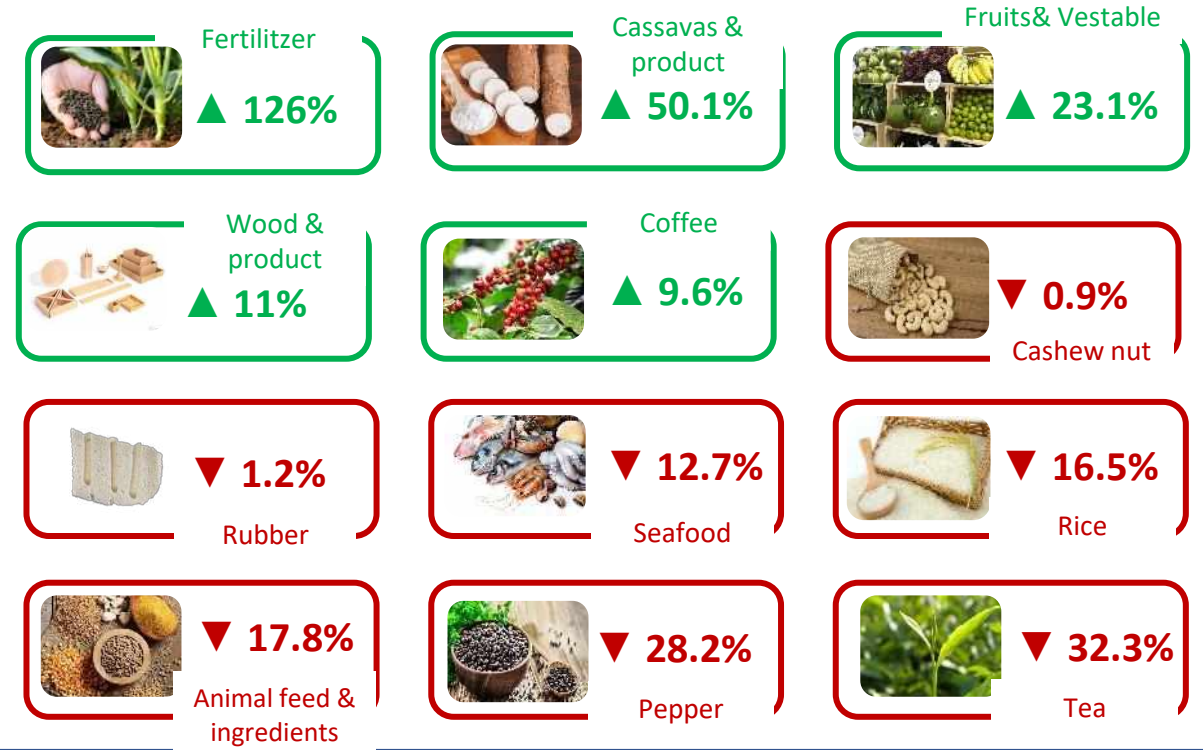
## AFF products Import- Export turnover between Vietnam – ASEAN, Dec-2023



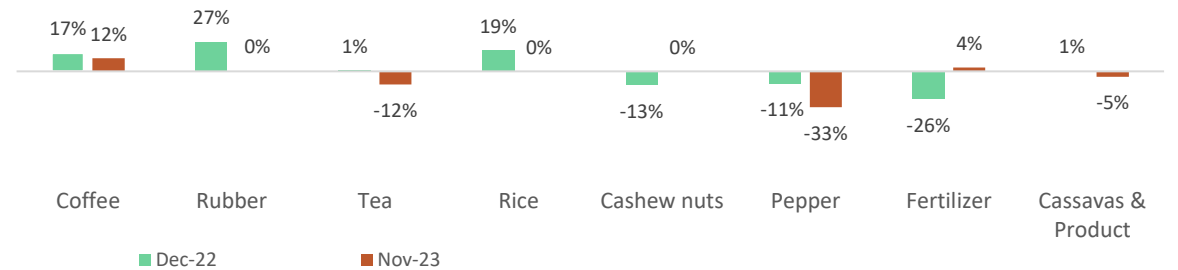
## AFF key product export value to the ASEAN, Dec-2023



## Changes in key product export value to the ASEAN in Oct-2023 compared to Nov-2023



## Change in average export value of key AFF products to the ASEAN in Oct-2023 compared to Dec-2022, and Nov 2023



Source: Calculated from data of the General Department of Customs

Unit: Mil.USD



## The economic growth forecast for ASEAN in 2024

## The economic growth forecast for ASEAN in 2024

The Asian Development Bank (ADB) forecasts a growth rate of 4.7% for ASEAN in 2024. According to the organization, the Philippines is projected to have the highest growth in the ASEAN region at 6.2% in 2024, followed by Vietnam at 6%. Meanwhile, the economy with the largest GDP in the ASEAN region, Indonesia, is expected to grow at a rate of 5%, while Singapore is anticipated to have the lowest growth at 2.5% in the coming year.



Source: [mekongasean.vn](http://mekongasean.vn)



## ASEAN is China's largest trading partner

## ASEAN is China's largest trading partner

According to the General Administration of Customs of China, in 2023, ASEAN continued to be China's largest trading partner for the fourth consecutive year, reaching 6.41 trillion CNY (910 billion USD). The trade volume between China and ASEAN has increased 16.8 times over the past 20 years, exceeding 380 billion USD.

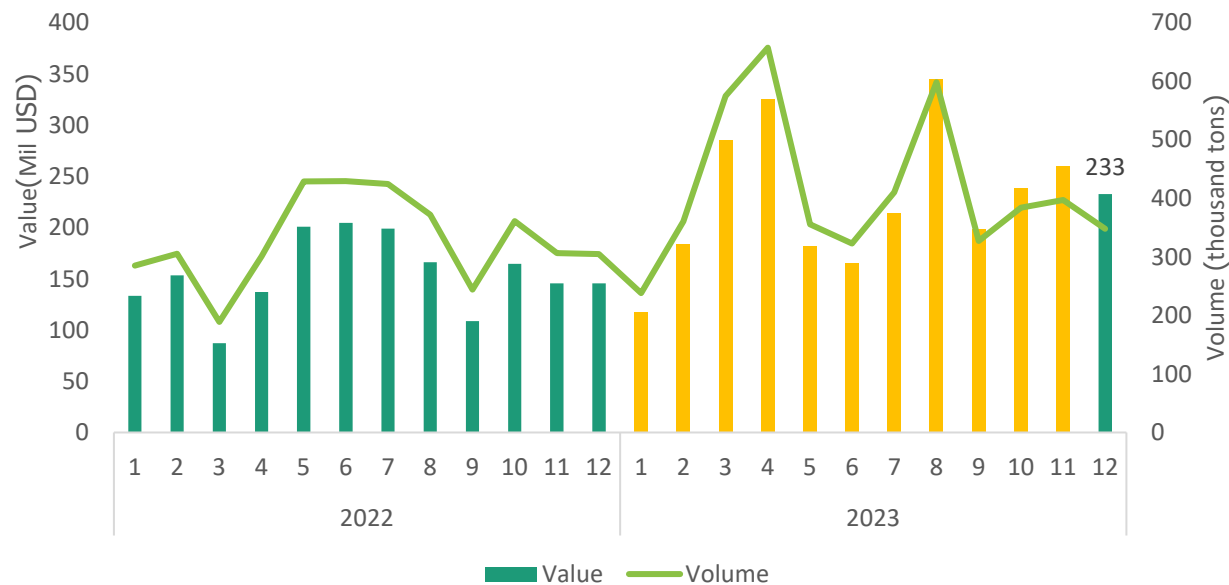
The value of goods imported and exported through the Huu Nghi Quan border gate (China) reached 423.22 billion CNY in 2023, a 111.6% increase compared to the same period. The value of agricultural exports from ASEAN countries to China reached 24.12 billion CNY, marking a significant increase of 261.9%.

Source: [vov.vn](http://vov.vn)



# RICE

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



## Export results the ASEAN, Dec-2023

### VALUE

**232.6** Mil. USD

↘ Decrease **10.5%** compared to Nov-2023

↗ Increase **59.8%** compared to Dec-2022

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

◇ The total exported value in 2023 reached **2.7 Bil. USD; 148.9%** of the total 2022

### VOLUME

**347.8** Thousand tons

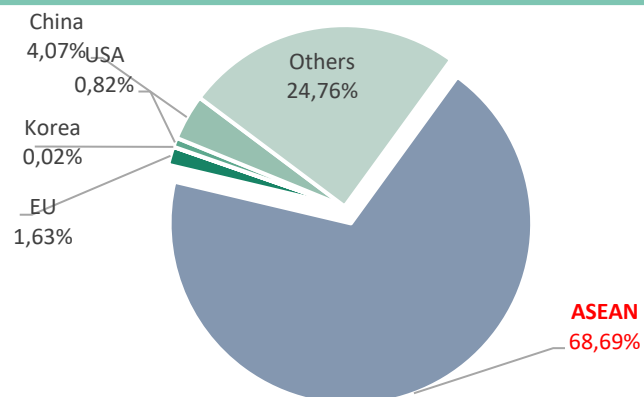
↘ Decrease **12.4%** compared to Nov-2023

↗ Increase **14.1%** compared to Dec-2022

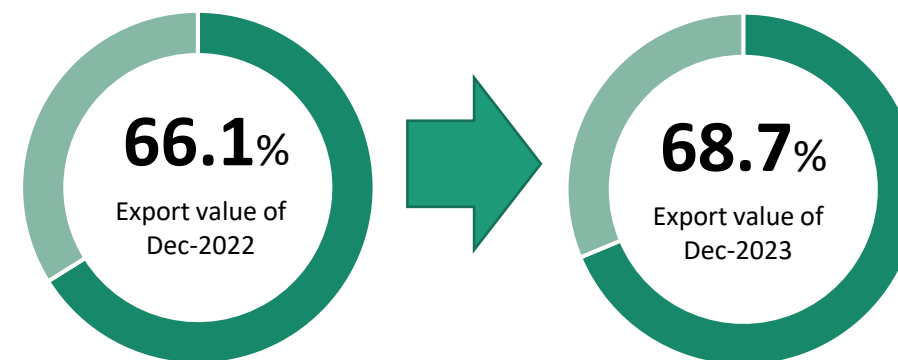
↗ **18.5 thousand tons** more than the monthly average rate in 2022.

◇ The total exported volume in 2023 reached **5 Mil tons; 125.9%** of the total 2022.

## Percentage of export value the ASEAN, Dec-2023



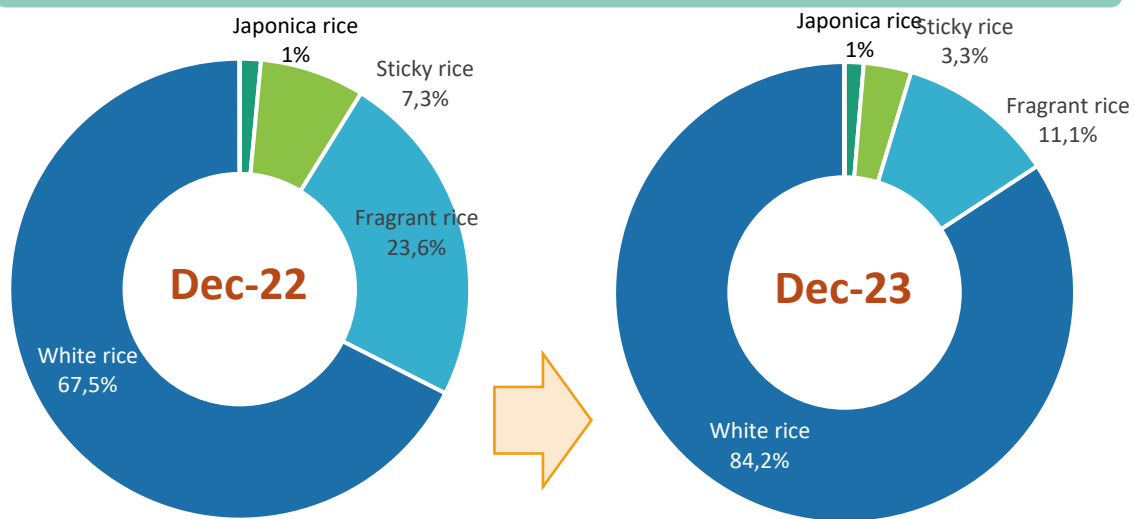
## Changes in the percentage of export value the ASEAN, Dec-2023





# RICE

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



## Average export rice price the ASEAN, Dec - 2023



### White rice

Value: **195.9** Mil.USD  
 Decrease **14%** compared to Nov-23  
 Increase **99%** compared to Dec-22



### Fangrant rice

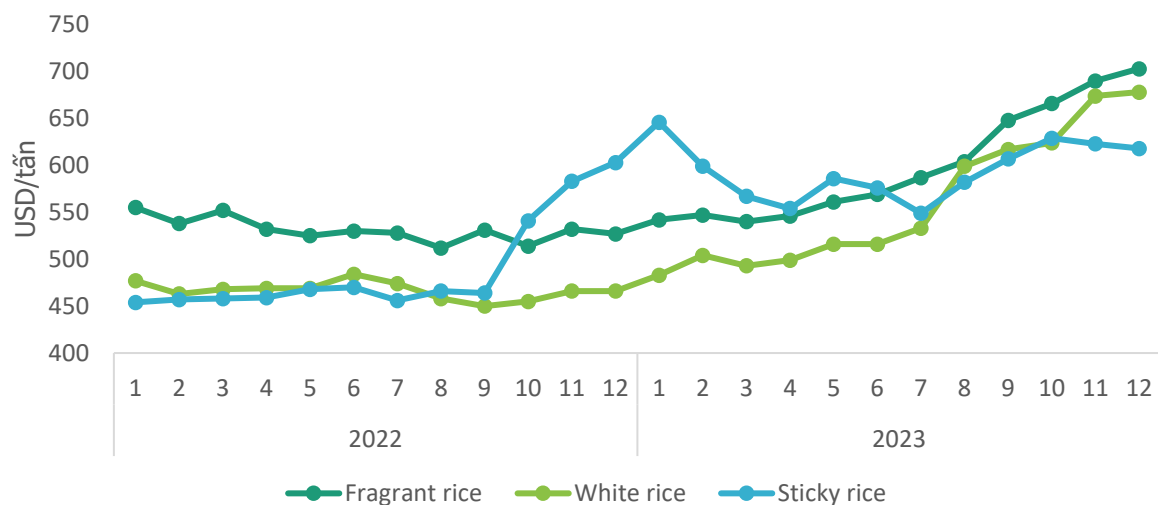
Value: **25.8** Mil.USD  
 Increase **27%** compared to Nov-23  
 Decrease **25%** compared to Dec-22



### Sticky rice

Value: **7.8** Mil.US  
 Increase **4%** compared to Nov-2  
 Decrease **27%** compared to Dec-22

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



### Sticky rice

The average export price in Dec-23 is **618** USD/ton; decrease **1%** compared to the previous month, but increase **3%** compared to the same month of 2022.

### Fangrant rice

The average export price in Dec-23 is **703** USD/ton; increase **2%** compared to the previous month, and increase **33%** compared to the same month of 2022.

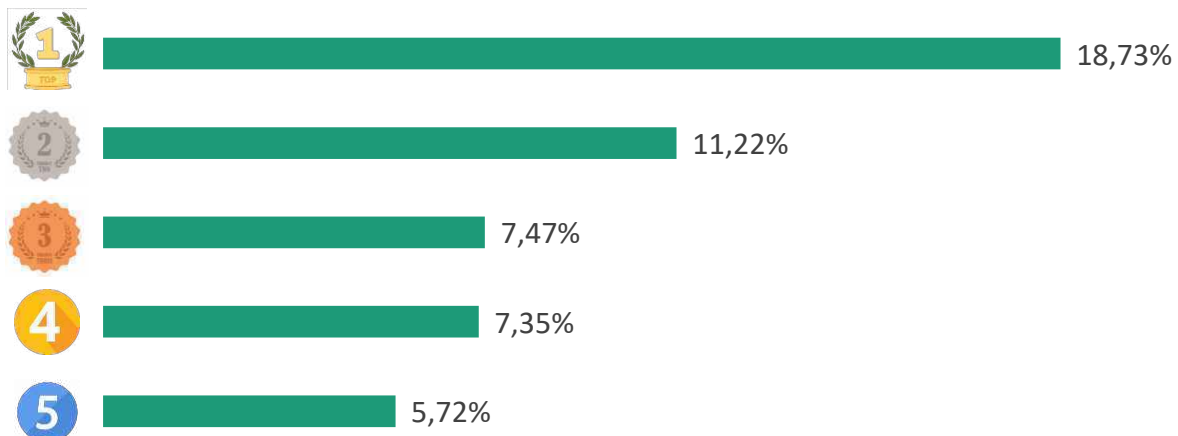
### White rice

The average export price in Dec-23 is **678** USD/ton; increase **1%** compared to the previous month, and increase **45%** compared to the same month of 2022.



# RICE

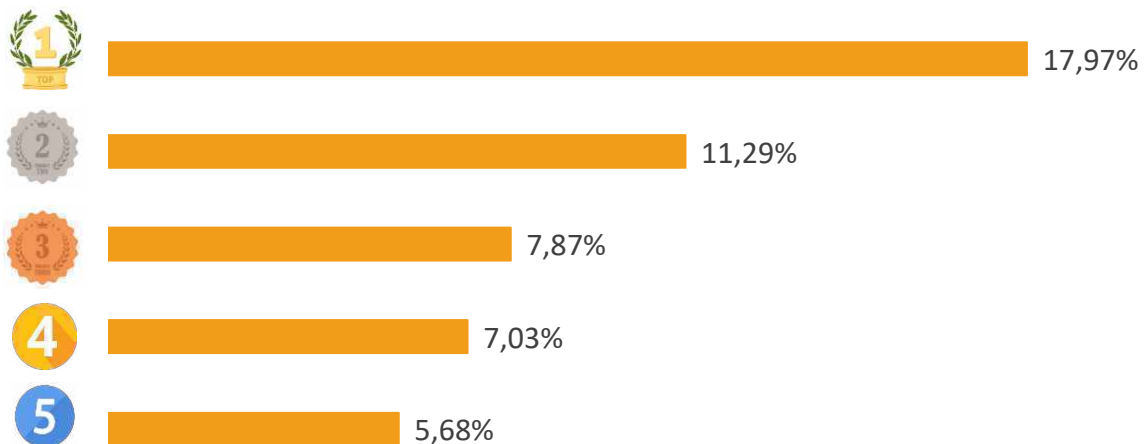
## TOP 5 export enterprises by value to the ASEAN, Dec-2023



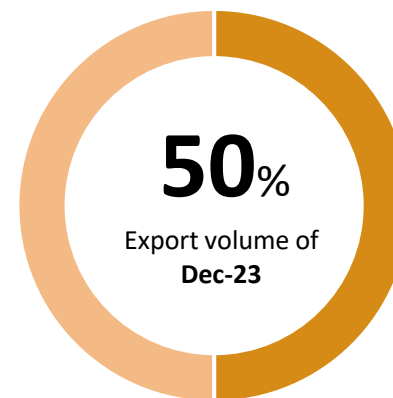
## Value ratio of TOP 5 export enterprises to the ASEAN, Dec-2023



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



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





# RICE

## SPOTLIGHT

01

The Indonesian government has approved the allocation of 2 million tons of rice imports by the State Logistics Agency (Bulog) in 2024, according to a statement from Bulog. This move aims to ensure the stability of the national rice reserve and address potential shortages arising from unrecovered domestic production conditions. Currently, Bulog's warehouses safely maintain the government's rice reserves. Starting from January 2024, Bulog will ensure the supply of 1.3 million tons of rice reserves for market operations and distribution of rice aid.

*Source: Bnews.vn*

02

According to the Philippines Department of Agriculture, the total volume of rice imports in 2023 amounted to 3.6 million tons, with a significant portion originating from Vietnam, Thailand, and Pakistan. The Philippines Department of Agriculture anticipates the importation of 500,000 tons of rice in February of this year. In the context of the El Niño phenomenon causing drought conditions and threatening the country's food supply, the Philippine government continues to explore ways to augment essential commodities, particularly rice, in its reserve stocks. A report from the USDA forecasts an increase in rice procurement by the Philippines in 2024, reaching a record import volume of 3.8 million tons.

*Source: Vov.vn*

03

On January 9, 2024, the Chairman of the Thai Rice Exporters Association reported that Thailand's rice exports in November 2023 reached 1.007 million tons, a 19.9% increase, generating 23.01 billion baht (657.79 million USD), up by 23.3% compared to October 2023. The surge in rice exports in November 2023 was predominantly driven by polished and fragrant rice varieties, as importers sought to replenish dwindling inventory levels amid global rice prices reaching their highest point in 15 years.

Polished rice exports in November 2023 reached 659,694 tons, a 31% increase compared to October. Major markets for Thai polished rice include Indonesia, the Philippines, Algeria, Iraq, Malaysia, Japan, Brazil, and Cameroon. Conversely, the volume of parboiled rice exports in November 2023 was 91,303 tons, a decrease of 11.2% compared to October, generating 4.61 million USD. In the first 11 months of 2023, Thailand exported a total of 7.945 million tons of rice, marking a 14.7% increase compared to the same period in 2022.

Citing data from the Thai Rice Exporters Association, Thailand's rice exports for December 2023 are estimated at 800,000-900,000 tons. This promising figure adds to the association's belief that Thailand will surpass its initial goal of exporting 8.5 million tons of rice in 2023.

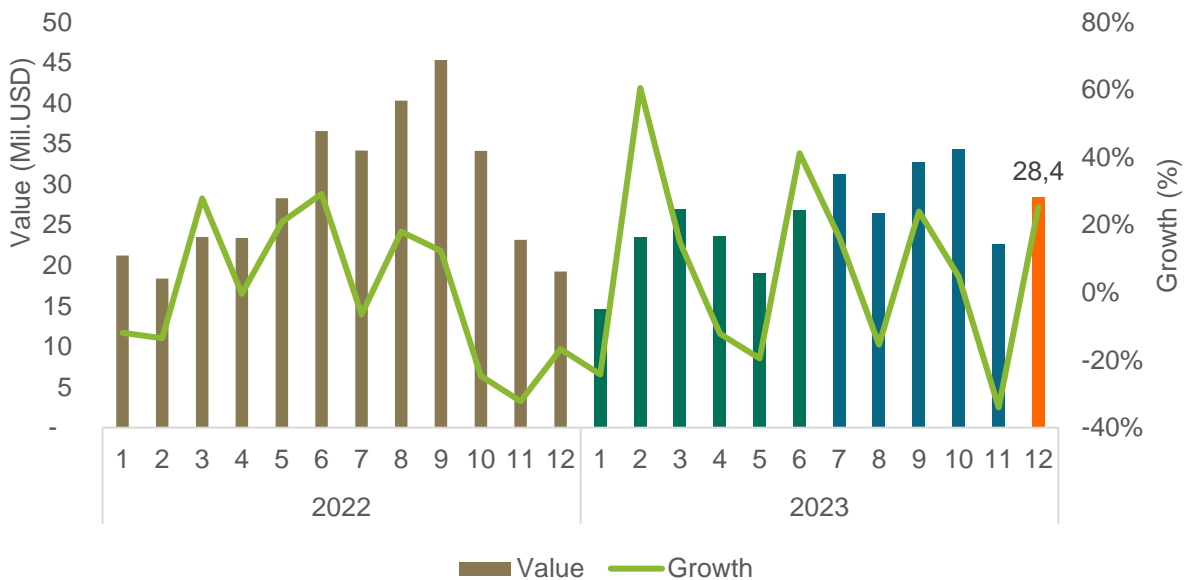
*Source: Nongnghiep.vn*





# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, Dec-2023



## Export results to the ASEAN, Dec-2023

**VALUE**

# 28.4

**Mil.USD**

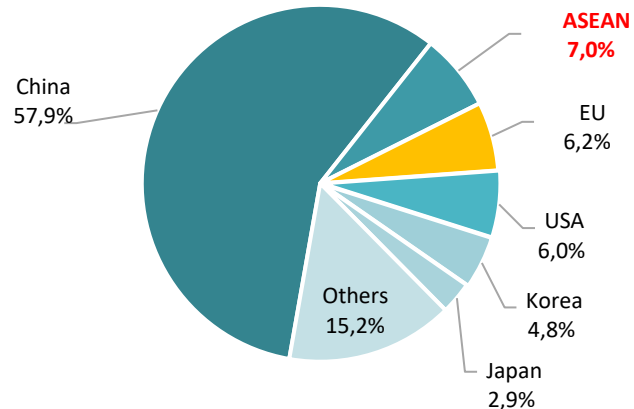
Increase **25.3%** compared to Nov-23

Increase **47.4%** compared to Dec-22

**0.58 Mil.USD** less than the monthly average in 2022.

The total value of exports in 2023 reached **310.3 Mil. USD**; **89.2%** of the total 2022.

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



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

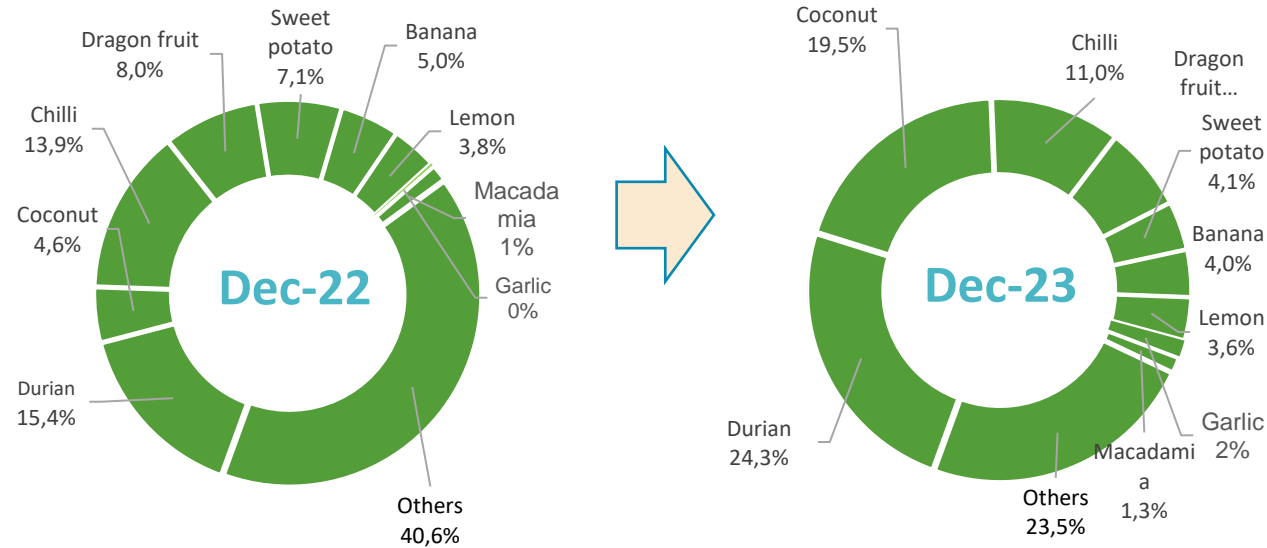


Source: Calculated from data of the General Department of Customs



# FRUITS AND VEGETABLES (EXPORT)

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



## Export results to the ASEAN, Dec-2023



### Durian

Value: **6.9** Mil.USD

Increase **10.7%** compared to Nov-23

Increase **132.9%** compared to Dec-22



### Coconuts

Value: **5.5** Mil.USD

Increase **34.2%** compared to Nov-23

Increase **523.3%** compared to Dec-22



### Chili

Value: **3.1** Mil.USD

Increase **25.8%** compared to Nov-23

Increase **16.8%** compared to Dec-22



### Dragon fruit

Value: **2.0** Mil.USD

Increase **13.1%** compared to Nov-23

Increase **31%** compared to Dec-22



### Sweet potato

Value: **1.2** Mil.USD

Increase **18.7%** compared to Nov-23

Decrease **14.3%** compared to Dec-22



### Banana

Value: **1.1** Mil. USD

Increase **8.2%** compared to Nov-23

Increases **18.4%** so với T12/2022



### Lemon

Value: **1.0** Mil.USD

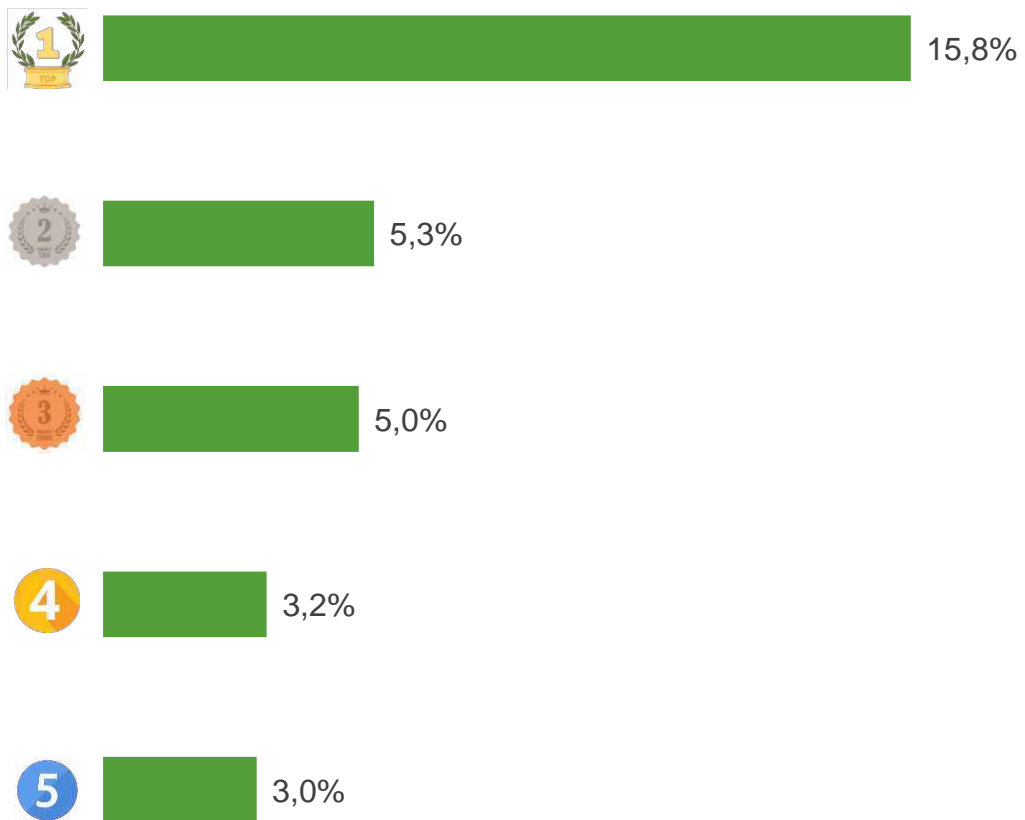
Increase **14.0%** compared to Nov-23

Increase **41.4%** compared to Dec-22

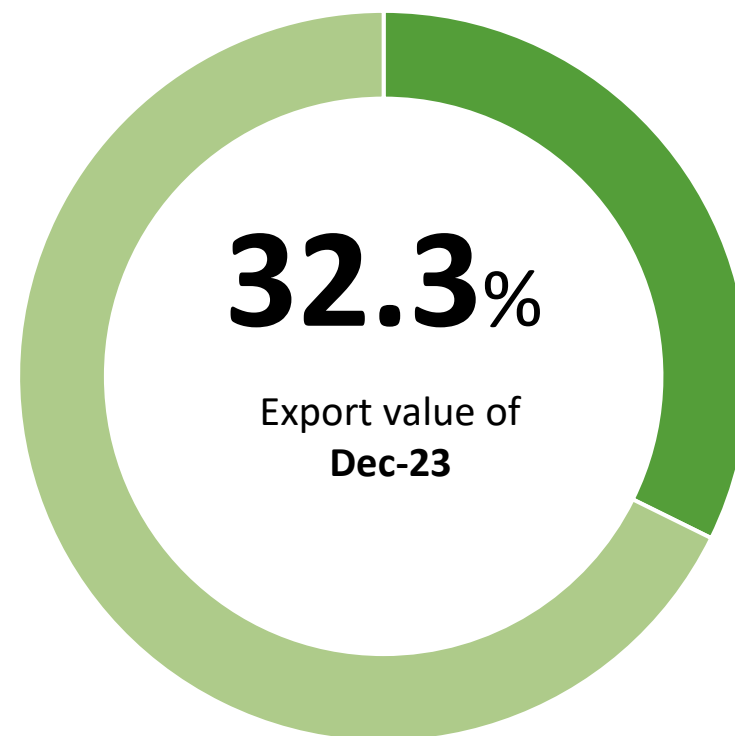


# FRUITS AND VEGETABLES (EXPORT)

## TOP5 export enterprises by value to the ASEAN, Dec-2023



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





# FRUITS AND VEGETABLES (IMPORT)

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



## Import results from the ASEAN, Dec-2023

### VALUE



# 18.8

Mil. USD

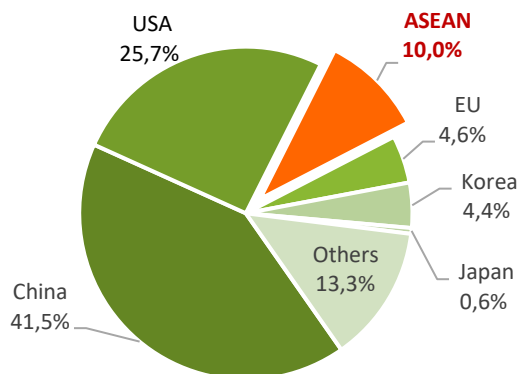
Decrease **7.2%** compared to Nov-23

Decrease **22.0%** compared to Dec-22

**4.9 Mil.USD** less than the monthly average in 2022

The total value of imports in 2023 reached **231.3 Mil.USD**; **86.5%** of the total 2022

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



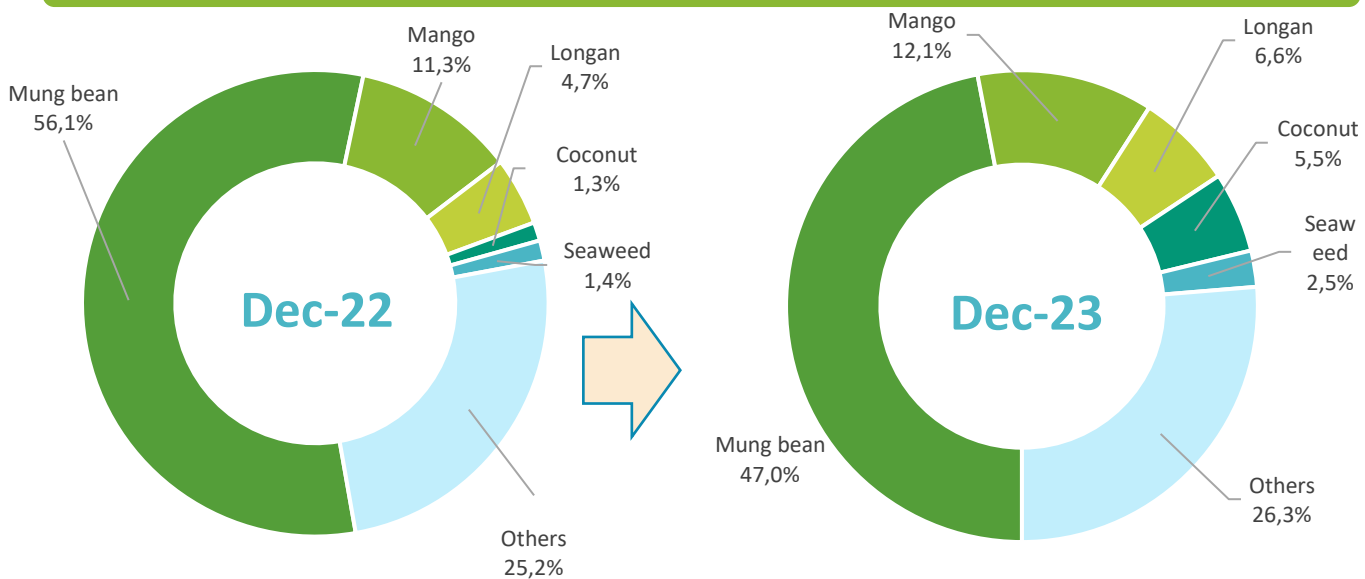
## Changes in percentage of import value from the ASEAN, Dec-2023





# FRUITS AND VEGETABLES (IMPORT)

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



### Longan

Value: **1.2** Mil. USD  
 Decrease **2.3%** compared to Nov-22  
 Increase **8.7%** compared to Dec-23



### Coconut

Value: **0.96** Mil.USD  
 Decrease **53.2%** compared to Nov-22  
 Increase **236.1%** compared to Dec-23



### Seaweed

Value: **0.43** Mil. USD  
 Decrease **31.8%** compared to Nov-22  
 Increase **38.2%** compared to Dec-23

## Import results from the ASEAN, Dec-2023



### Mung bean

Value: **8.2** Mil.USD  
 Decrease **3.2%** compared to Nov-22  
 Decrease **34.7%** compared to Dec-23



### Mango

Value: **2.1** Mil.USD  
 Increase **15.3%** compared to Nov-22  
 Decrease **16.7%** compared to Dec-23

# FRUITS AND VEGETABLES

## SPOTLIGHT



01

According to the Deputy Minister of the Malaysian Ministry of Agriculture and Food Security, the anticipated timing for Malaysia's durian exports to China coincides with the commemoration of the 50th anniversary of diplomatic relations between the two countries, scheduled for May 31, 2024.

*Source: Vietnambiz.vn*

02

The Philippines has temporarily suspended the import of onions until May or July 2024. This decision was made following a proposal from the Philippine Department of Agriculture and Food to implement these measures in order to prevent further domestic onion price reductions.

*Source: Bloomberg.com*

03

According to the Food and Agriculture Organization of the United Nations (FAO), the total banana production in the Philippines in 2023 reached 2.206 million tons, marking a 3% decrease compared to 2022. The decline in the volume of banana exports from the Philippines in 2023 is primarily attributed to the spread of the Tropical Race 4 (TR4) strain of Fusarium Wilt disease and logistical challenges. Nevertheless, the Philippines remains the third-largest global exporter of bananas, following Guatemala and Ecuador.

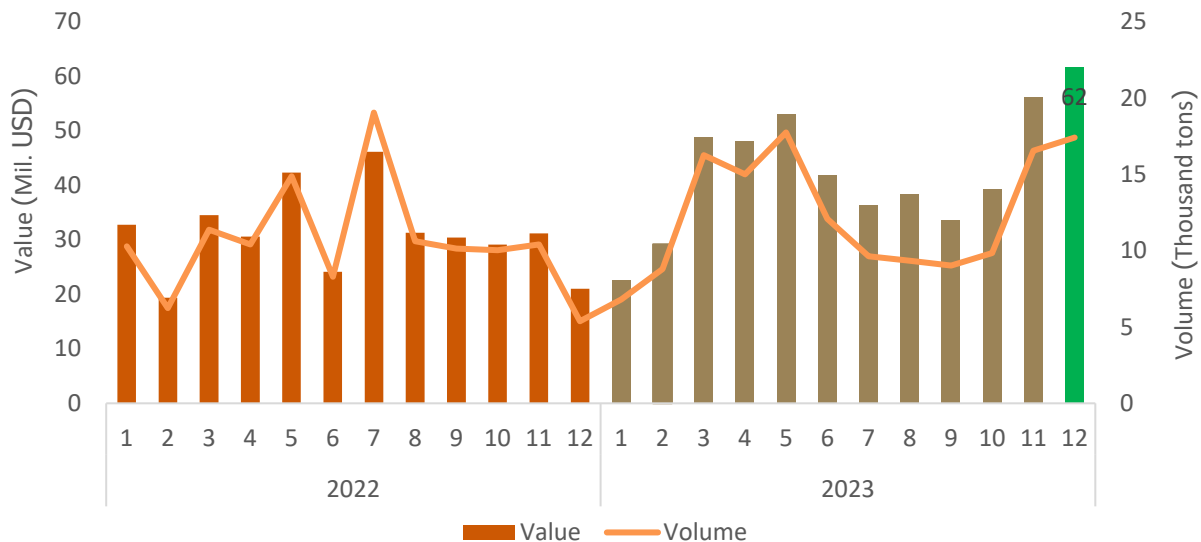
*Source: Freshplaza.com*



# COFFEE



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



## Export results to the ASEAN, Dec-2023

### VALUE

**61.6** Mil. USD

↗ Increase **9.6%** compared to Nov-23

↗ Increase **193.3%** compared to Dec-22

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

❖ The total value of exports in 2023 reached **508.8** Mil.USD; **136.5%** of the total 2022.

### VOLUME

**17.4** Thousand tons

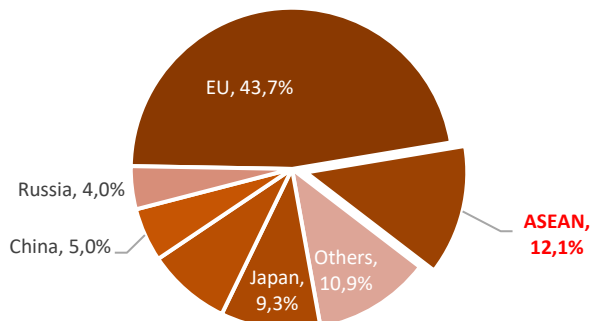
↗ Increase **5.1%** compared to Nov-23

↗ Increase **223.4%** compared to Dec-22

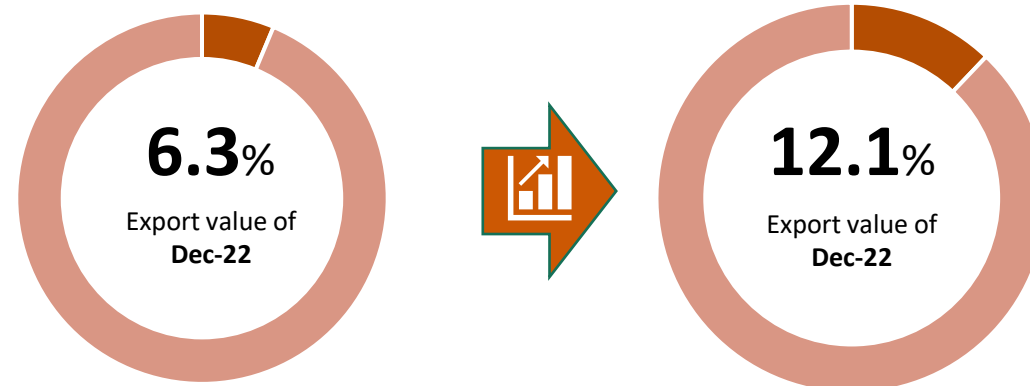
↗ **6.8** thousand tons more than the monthly average rate in 2022.

❖ The total volume of exports in 2023 reached **148.5** thousand tons, **116.8%** of the total 2022.

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

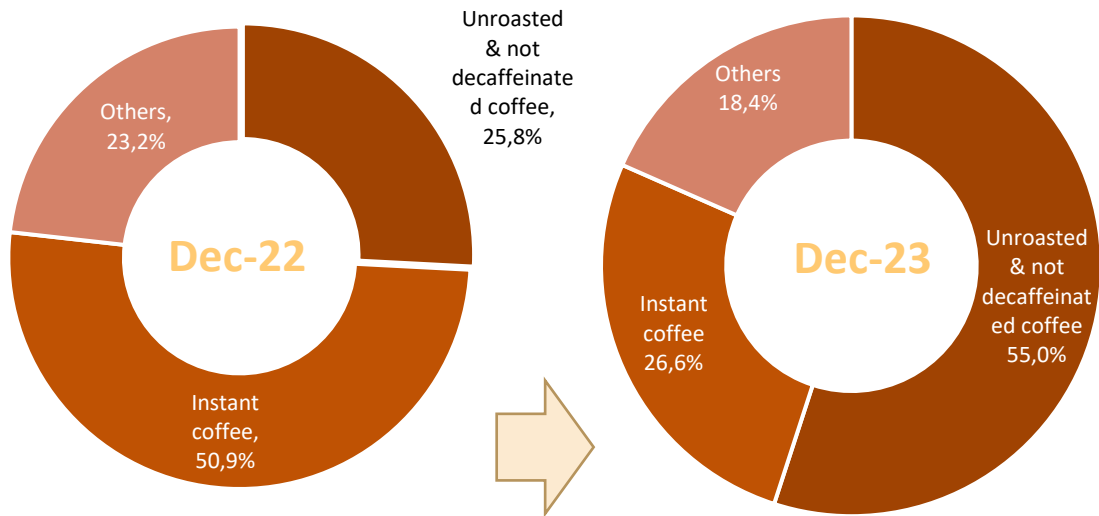


## Changes in percentage of export value to the ASEAN, Dec-2023

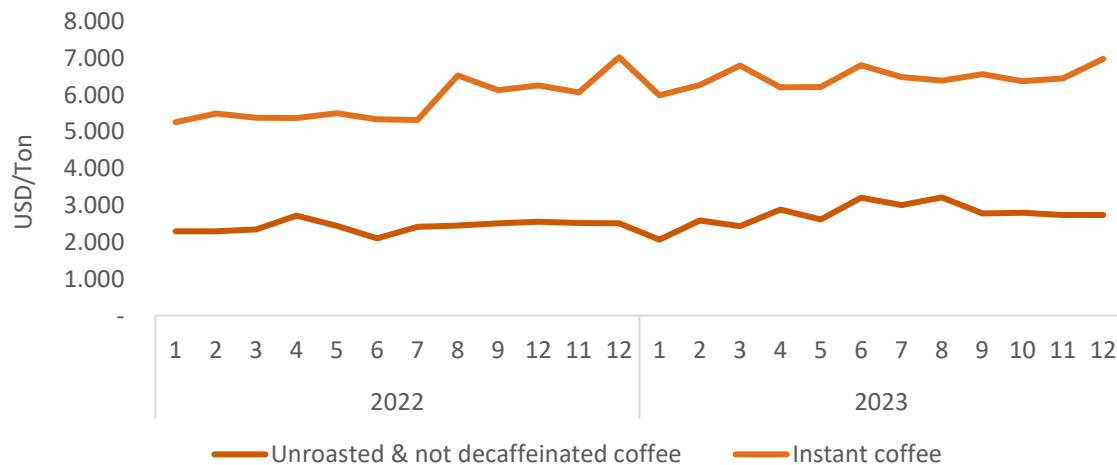


# COFFEE

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



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



## Export results to the ASEAN, Dec-2023



### Unroasted & not decaffeinated coffee

Value: **33.9** Mil.USD

Increase **0.9%** compared to Nov-23

Increase **524%** compared to Dec-22



### Instant coffee

Value: **16.4** Mil.USD

Increase **10.8%** compared to Nov-23

Increase **53%** compared to Dec-22



### Roasted and not decaffeinated coffee

Value: **10.6** Mil.USD

Increase **68.9%** compared to Nov-23

Increase **155%** compared to Dec-22

### Instant coffee

The average export price in Dec-23 is **6,980** USD/ton, increase **8.3%** compared to the previous month, but decrease **0.1%** compared to the same month of 2022.

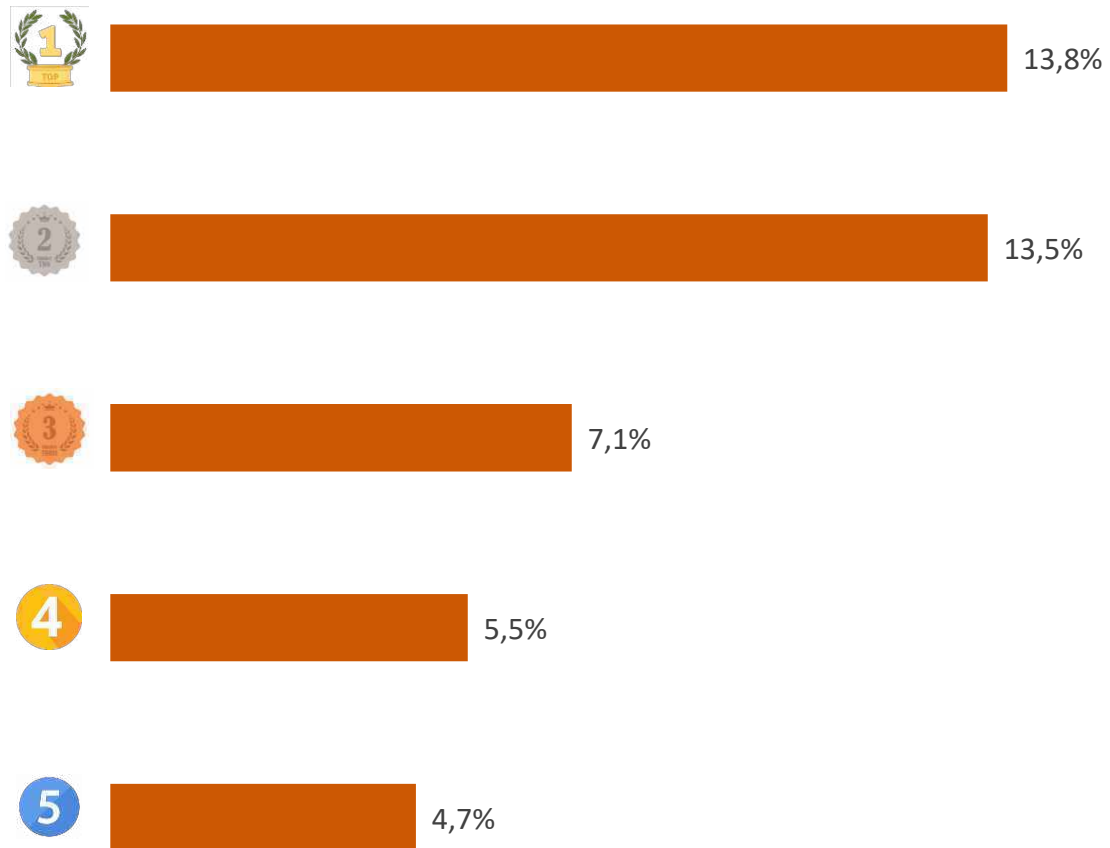
### Unroasted & not decaffeinated coffee

The average export price in Dec-23 is **2,733** USD/ton; decrease **0.5%** compared to the previous month, but increase **8.8%** compared to the same month of 2022.

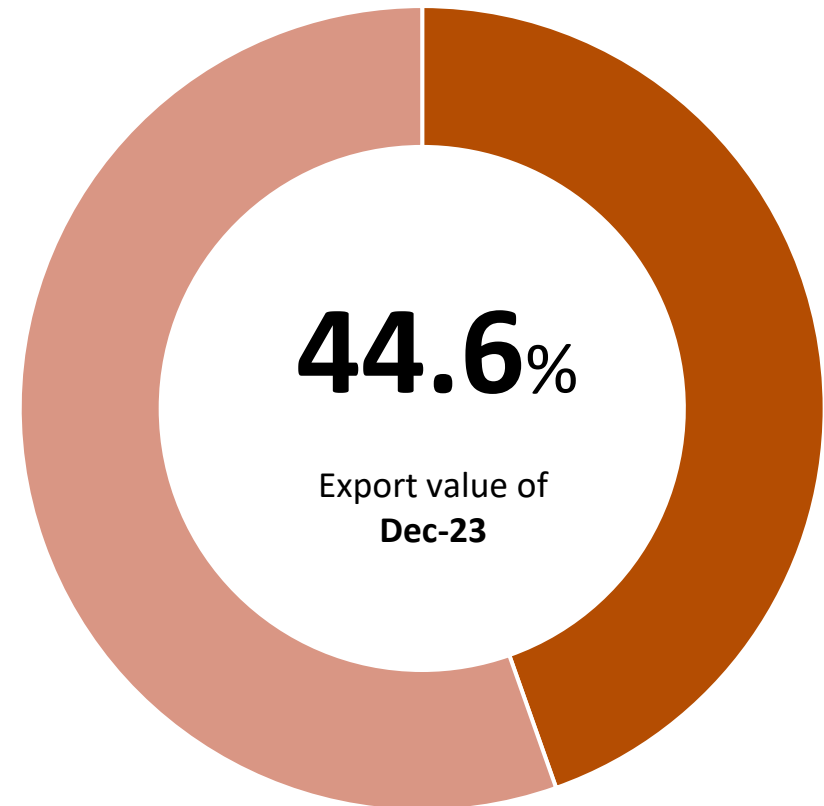


# COFFEE

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



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







According to Statista, in 2024, coffee revenue in the ASEAN market is projected to reach approximately 8.9 billion USD. The growth rate for the period 2024-2028 is estimated to be 7.76% per year. By 2028, coffee consumption in this market is forecasted to reach 0.7 million tons. In 2024, the expected average coffee consumption is projected to be 0.35 kg per person.

*Source: statista.com (1/2024)*

The U.S. Department of Agriculture (USDA) forecasts that Indonesia's coffee production will reach 9.7 million bags (60kg per bag) in the 2023/2024 crop year, a decrease of 2.2 million bags compared to the previous year. Specifically, Robusta coffee production is expected to reach 8.4 million bags, a decrease of 2.1 million bags, while Arabica coffee production is projected to reach 1.3 million bags. Indonesia's green coffee bean exports in the 2023/2024 crop year are estimated to reach 5 million bags, a decrease of 2.7 million bags compared to the 2022/2023 crop year.

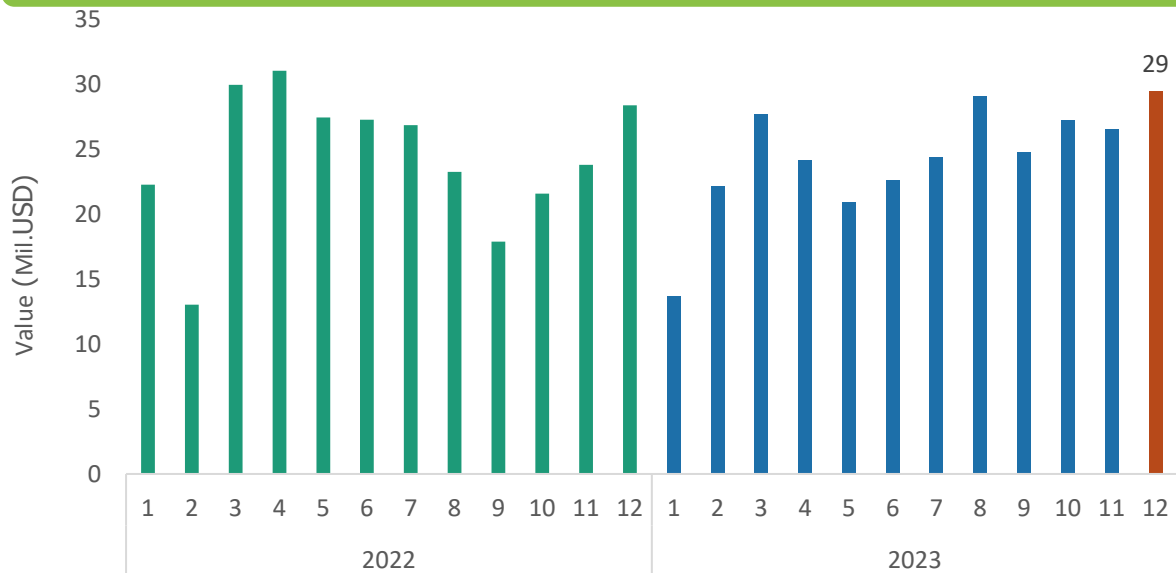
*Source: USDA (1/2024)*





# WOOD & WOODEN PRODUCTS

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



## Export results to the ASEAN, Dec-2023

### VALUE

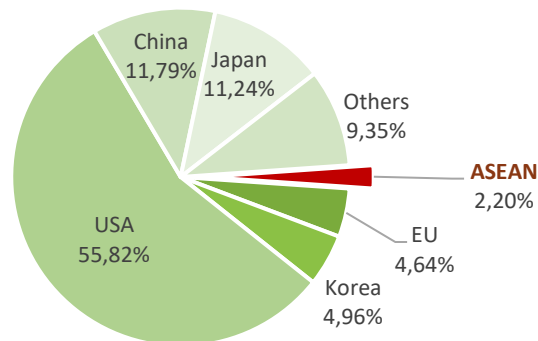


30

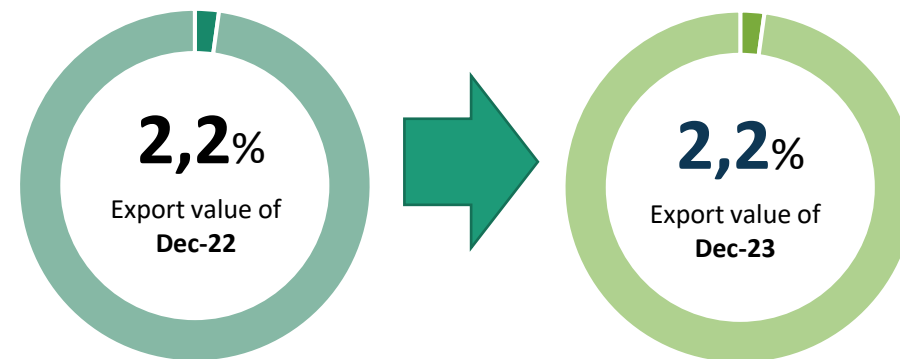
Mil. USD

- Increase **11.0%** compared to Nov-22
- Increase **3.8%** compared to
- **5 Mil. USD** more than the monthly average rate in 2022
- ❖ The total export value in 2023 reaches **293** Mil.USD; **99.9%** of the total 2022.

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



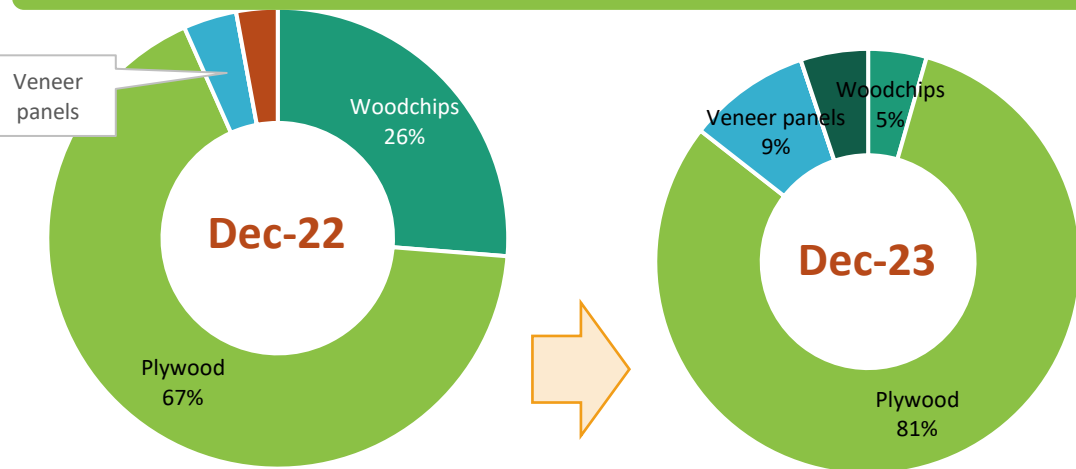
## Changes in percentage of export value to the ASEAN, Dec-2023





# WOOD & WOODEN PRODUCTS

## Structure of exports by products to China, Dec-2023



## Export results to China, Dec-2023



### Plywood

Value: **22.2** Mil. USD

Increase **11%** compared to Nov-23

Decrease **3%** compared to Dec-22



### Wood slabs

Value: **2.5** Mil. USD

Decrease **28%** compared to Nov-23

Increase **99%** compared to Dec-22



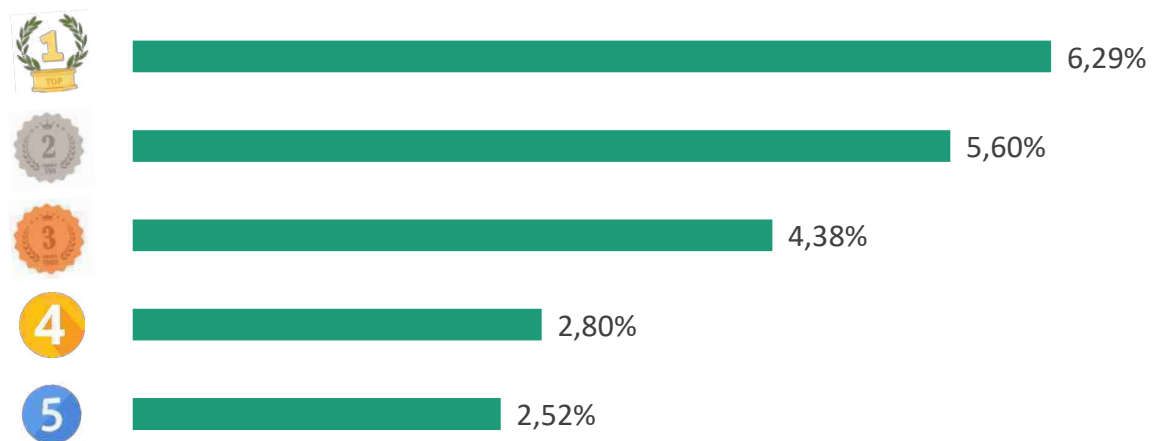
### Woodchips

Value: **1.2** Mil. USD

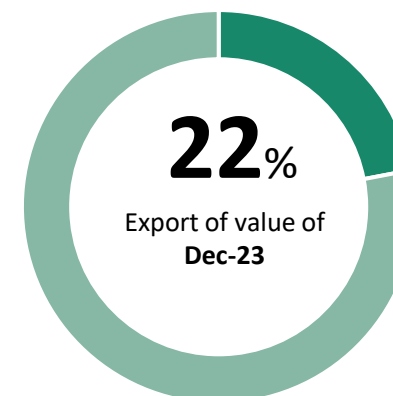
Decrease **35%** compared to Nov-23

Decrease **86%** compared to Dec-22

## TOP 5 export enterprises by value to China, Dec-2023



## Value ratio of TOP 5 export enterprises to China, Dec-2023





# WOOD & WOODEN PRODUCTS



## SPOTLIGHT

The Indonesian government is planning to establish a Special Economic Zone for the timber industry to increase wood production and enhance the competitiveness of Indonesia's wood and furniture products. This decision aims to address Indonesia's competitive disadvantage compared to Vietnam in the export of wood products, as Vietnam's total export value significantly surpasses that of Indonesia.

*Source: Antaranews.com*

According to the Indonesian Furniture Association, Indonesia's furniture exports in 2023 decreased by 28% compared to the previous year. This decline is attributed to political tensions, high inflation in export markets, and increased domestic raw material prices.

*Source: ITTO*





# WOOD & WOODEN PRODUCTS



## SPOTLIGHT

The export value of wood products from Sarawak, Malaysia, in 2023 decreased to USD 655.5 million from USD 824.6 million in 2022. The export of roundwood is estimated to reach USD 118.2 million, constituting 18% of the total wood export turnover. Japan continues to be the largest export market for Sarawak, accounting for 53%. Plywood is the largest exported wood product, comprising 48% of the total export value of wood products from Sarawak.

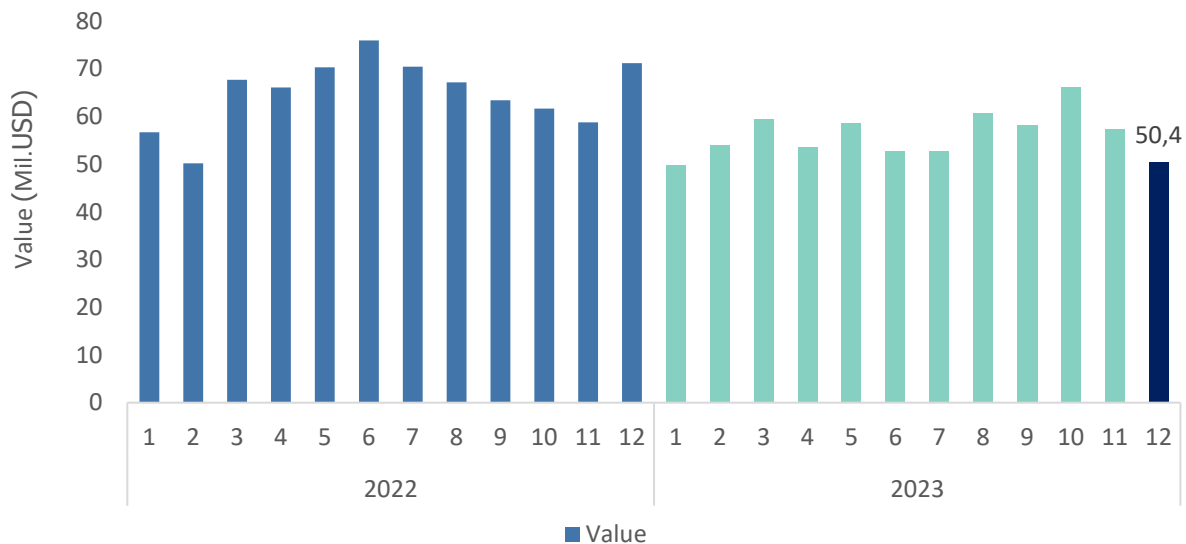
*Source: ITTO*





# FISHERIES

## Export value to the ASEAN, Dec-2023



## Export results to the ASEAN, Dec-2023

### VALUE



**50.4** Mil.USD

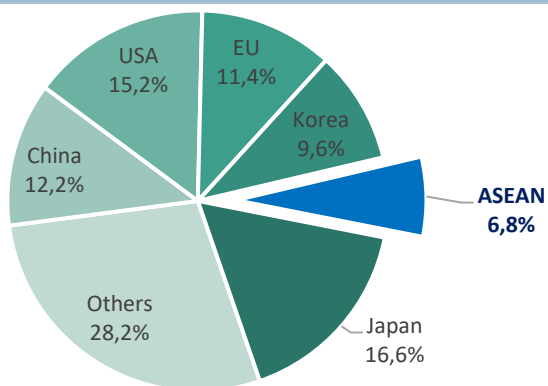
↘ Decrease **12.3%** compared to Nov-23

↘ Decrease **29.2%** so với T12/2022

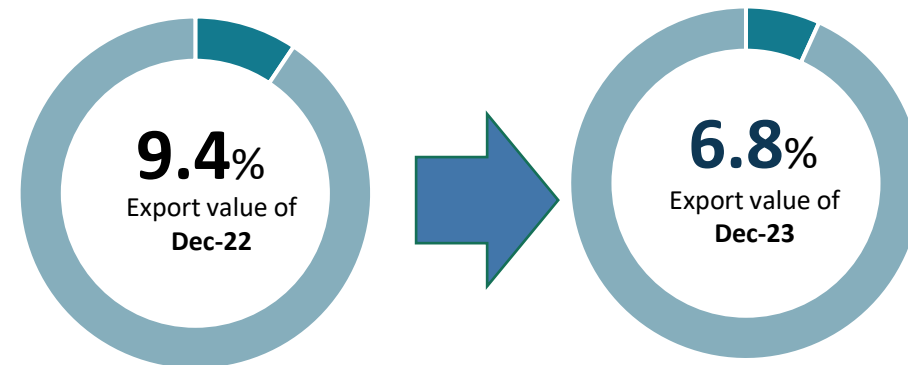
↘ **14.6 Mil.USD** less than the monthly average rate in 2022.

◇ The total value of exports in 2023 reached **673.6** Mil.USD; **86,4%** of the total 2022

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



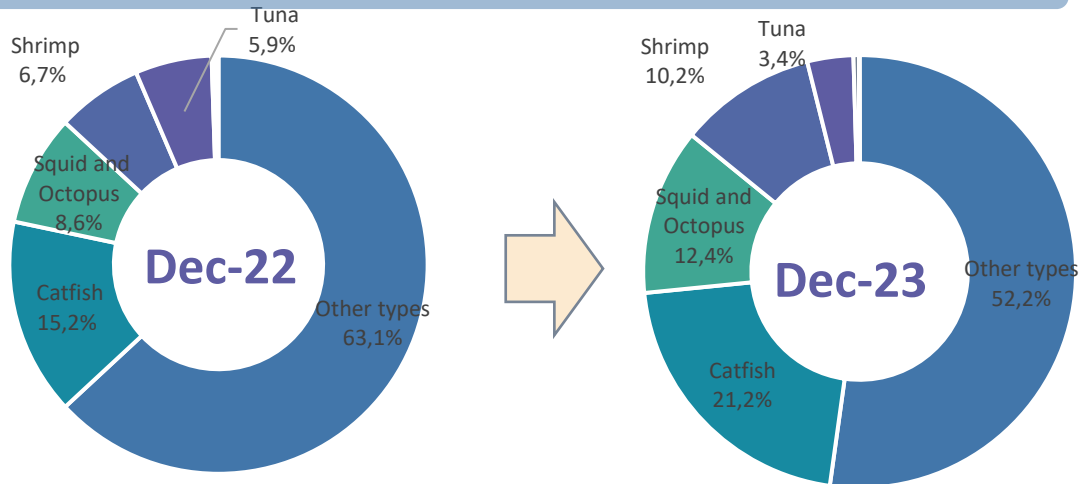
## Change in percentage of export to the ASEAN, Dec-2023



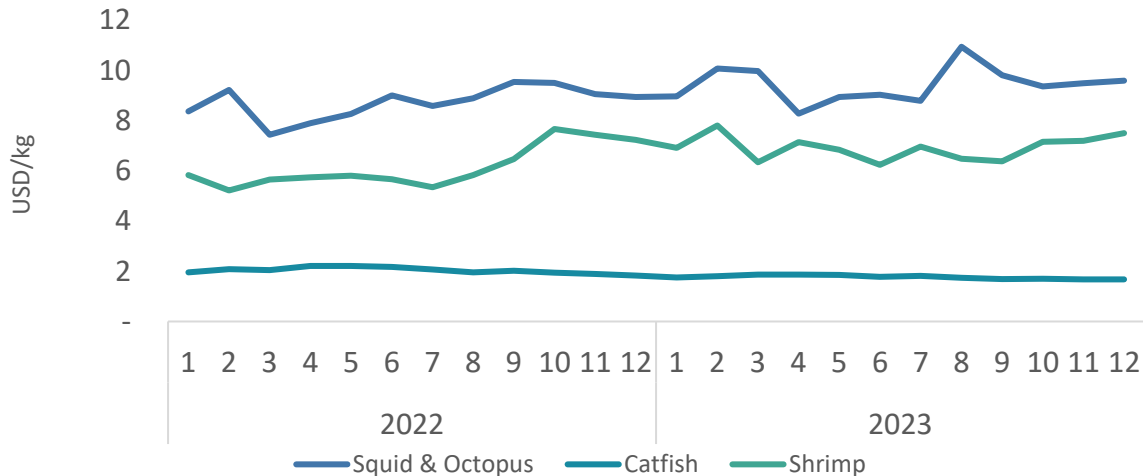


# FISHERIES

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



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



## Export results to the ASEAN, Dec-2023



### Catfish

Value: **10.6** Mil. USD

**Decrease 15.2%** compared to Nov-23

**Decrease 2.2%** compared to Dec-22



### Squid & Octopus

Value: **6.2** Mil. USD

**Decrease 19.8%** compared to Nov-23

**Increase 1.5%** compared to Dec-22



### Shrimp

Value: **5.1** Mil. USD

**Increase 1.9%** compared to Nov-23

**Increase 7.9%** compared to Dec-22

### Squid & Octopus

The average export price in Dec-23 is **9.6** USD/kg; **increase 1%** compared to previous month; and **increase 7.2%** compared to the same month of 2022.

### Catfish

The average export price in Dec-23 is **1.7** USD/kg; **decrease 0.2%** compared to previous month; and **decrease 8.2%** compared to the same month of 2022.

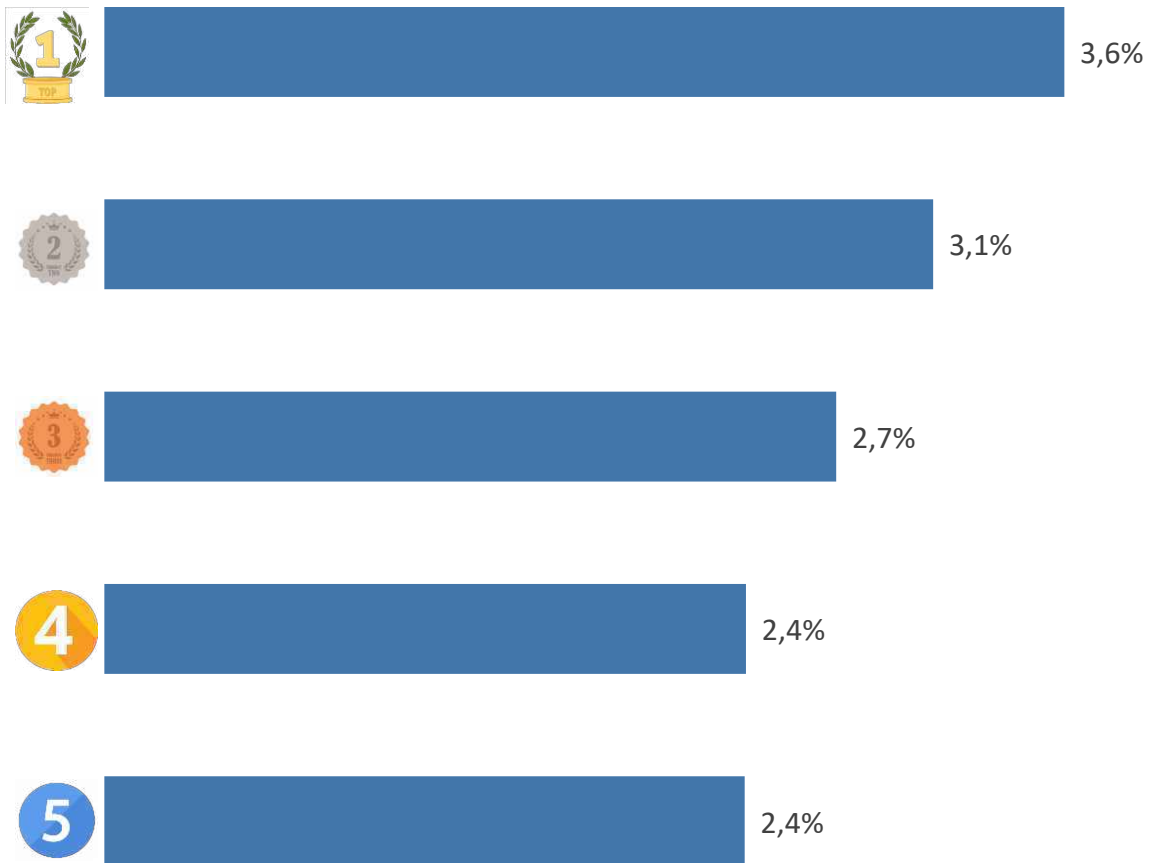
### Shrimp

The average export price in Dec-23 is **7.5** USD/kg; **increase 4.2%** compared to previous month; and **increase 3.2%** compared to the same month of 2022.

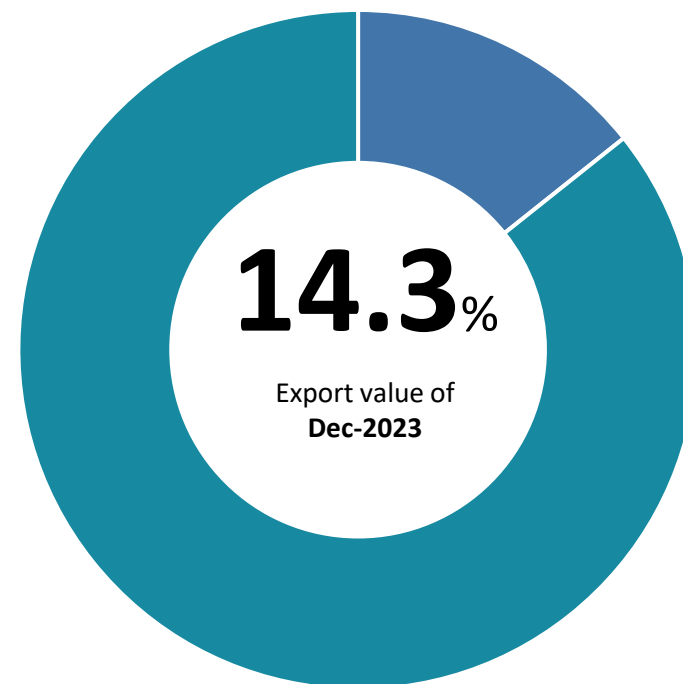


# FISHERIES

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



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





01

### **Indonesia proposes exporting lobster seeds to Vietnam in exchange for investment.**

During the visit to Hanoi, the Minister of Fisheries of Indonesia called for investment from Vietnam to develop Indonesia's fisheries sector, particularly in shrimp farming. In return, Indonesia could supply up to 300 million shrimp fry to Vietnam, thereby reducing the incidence of illegal fishing by Vietnamese vessels in Indonesian waters. Indonesia's waters are considered the sole breeding ground for naturally occurring shrimp fry in the region. However, Indonesia's shrimp farming sector lags behind other countries like Vietnam due to a lack of government support policies and fishermen lacking the skills required for shrimp cultivation.

*Source: Mongabay(1/2024)*

02

### **Thailand is developing two new shrimp breeds resistant to diseases.**

The Ministry of Agriculture and Fisheries of Thailand has successfully developed two new strains of whiteleg shrimp, namely Petchada 1 (rapid growth) and Sida 1 (disease-resistant). These are considered significant solutions by the Thai shrimp industry to strengthen and revive domestic shrimp farms, particularly after the decline caused by the disease outbreak in 2012.

*Source: Bangkokpost (1/2024)*





# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to the ASEAN, Dec-2023



## Export results to the ASEAN, Dec-2023



### VALUE

↗ Increase **164%** compared to Nov-23

↗ Increase **22%** compared to Dec-22

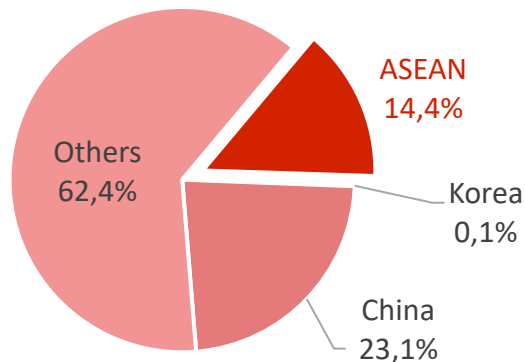
# 5.1

Mil.USD

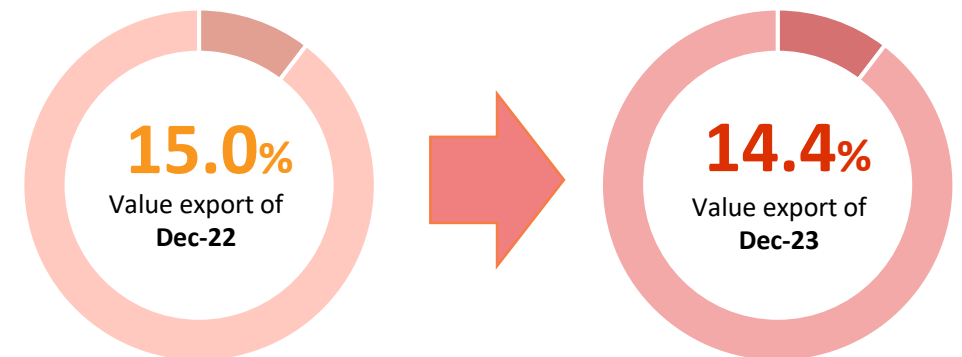
↗ **3.2 Mil.USD** more than the monthly average rate in 2022.

◆ The total value of exports in 2023 reached **47.3 Mil. USD**, **207%** of the total 2022.

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



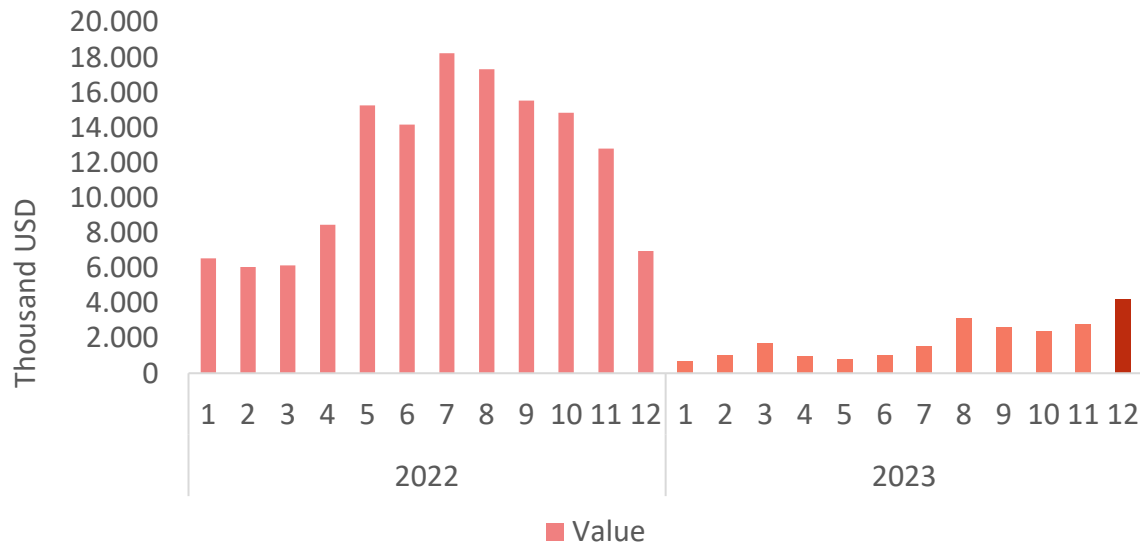
## Changes in percentage of export value to the ASEAN, Dec-2023





# MEAT & MEAT PRODUCTS (IMPORT)

## Import value from the ASEAN, Dec-2023



## Import results from the ASEAN, Dec-2023

### VALUE



# 4.2

Mil.USD

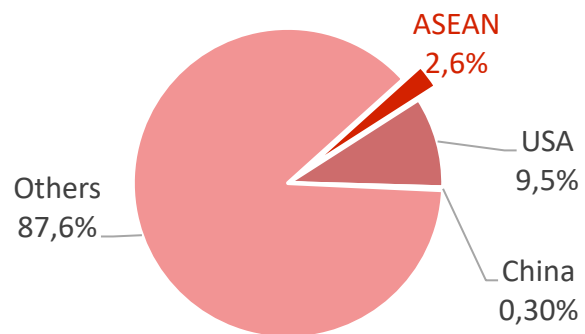
↗ Increase **50%** compared to Nov-23

↘ Increase **40%** compared to Dec-22

↓ **7.7 Mil. USD** less than the monthly average rate of 2022.

◇ The total value of imports in 2023 reached **22.9 Mil.USD, 16,1%** of the total 2022.

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



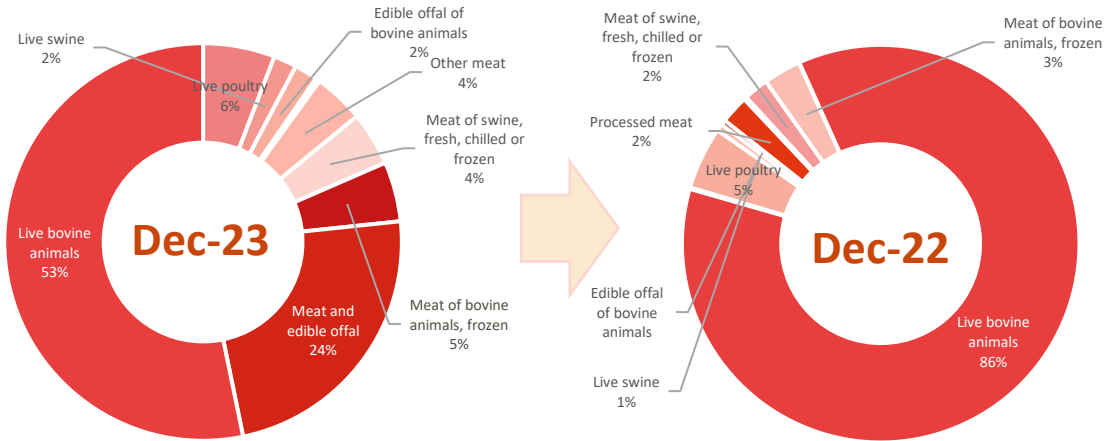
## Changes in the percentage of import value from the ASEAN, Dec-2023





# MEAT & MEAT PRODUCTS

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



## Import results to the ASEAN, Oct-2023



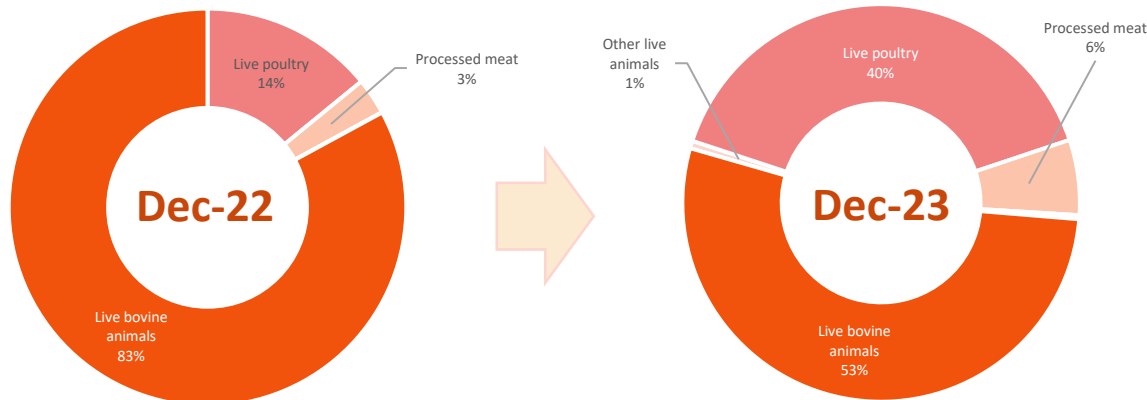
### Live bovine animals

Value: **4.4** Mil.USD

Decrease **92.5%** compared to Nov-23

Decrease **99.9%** compared to Nov-22

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



## Export results the ASEAN, Oct-2023



### Live poultry

Value: **1.7** Mil.USD

Increase **18.8%** compared to Nov-23

Increase **70.1%** compared to Dec-22



### Live bovine animals

Value: **2.2** Mil. USD

Increase **100.7%** compared to Nov-23

Decrease **61%** compared to Dec-22

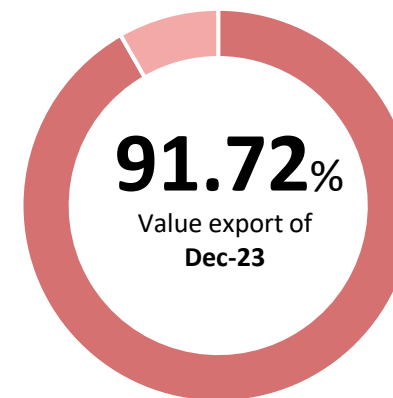


# MEAT & MEAT PRODUCTS

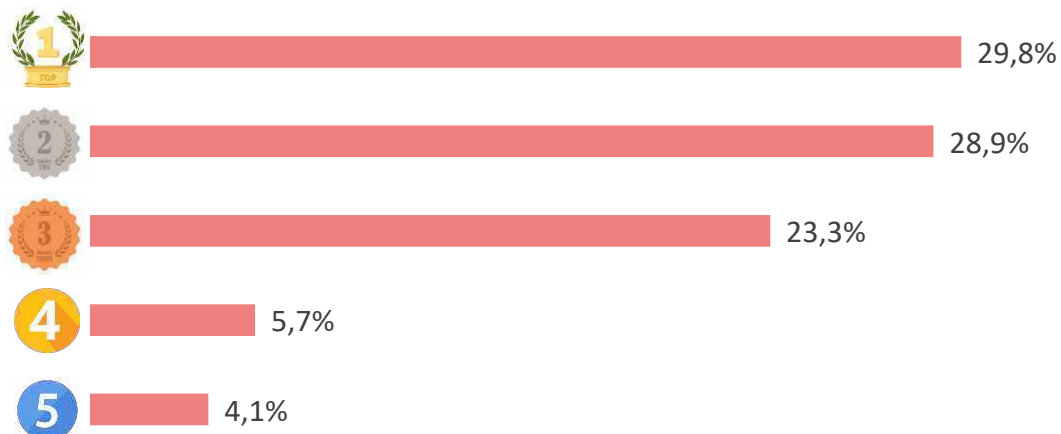
## Structure of export value by-products to the ASEAN, Dec-2023



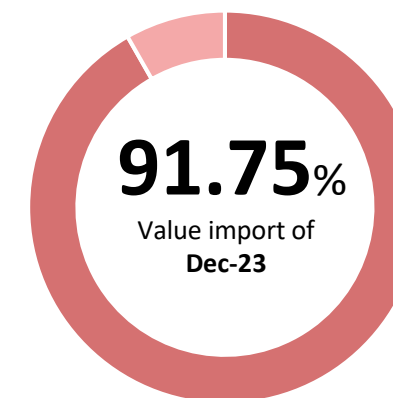
## Export results to the ASEAN, Dec-2023



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



## Import results of the ASEAN, Dec-2023





# MEAT & MEAT PRODUCTS

## SPOTLIGHT



On January 12, 2024, the Ministry of Commerce (MOC) and the Ministry of Agriculture, Forestry, and Fisheries (MAFF) of Cambodia jointly issued a public announcement regarding the temporary ban on the import of offal and frozen meat. This ban is effective from March 12, 2024, to September 12, 2024. The policy applies to all import-export businesses, except for qualified investment projects importing goods as inputs for export production. The prohibited items include:

- Frozen Ox and Buffalo's Tongue, lung, and other edible offal parts
- Frozen Pig's lung and other edible offal parts
- Edible frozen Chicken meat and offal, except wing, thigh, mechanically deboned or separated meat
- Fresh, Frozen, Salted, Marinated, Dried, or Roasted of Intestine, bladder, stomach, whole or parts of all animals, Except fish.

*Source: Bccambodia,*





Any comments, please send to:

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