

**Volume: June-2024**



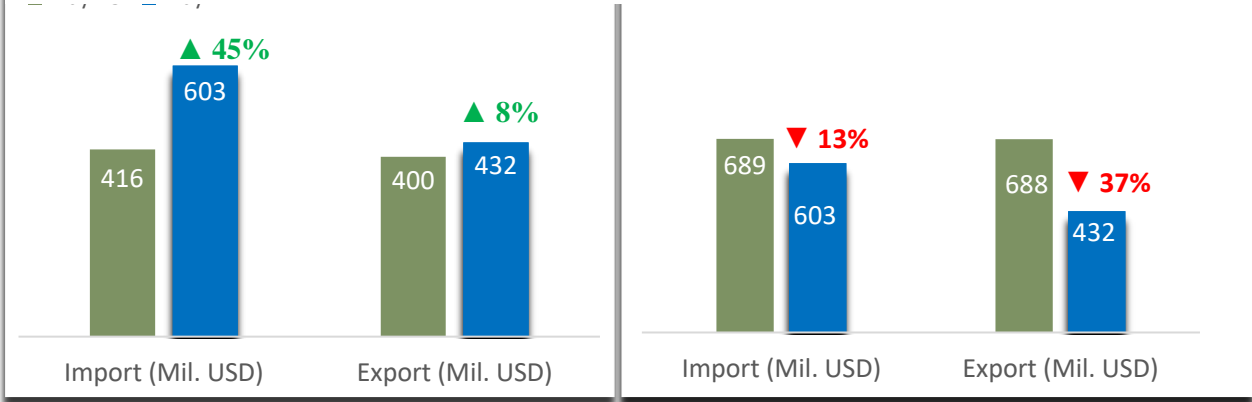
**MONTHLY REPORT ON  
AGRI-PRODUCT EXPORT**

**FROM VIETNAM TO  
ASEAN MARKET**

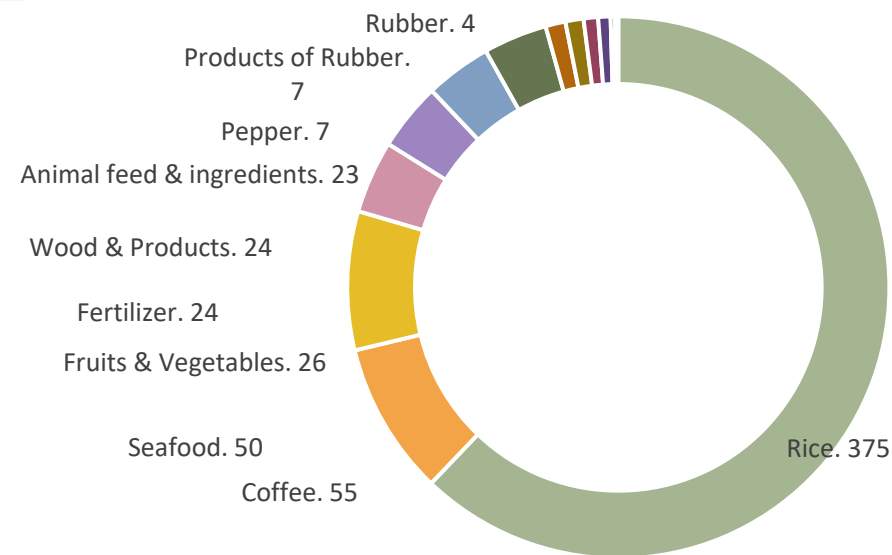


# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO ASEAN IN MAY 2024

AFF product import-export turnover between Viet Nam and ASEAN, May 2024

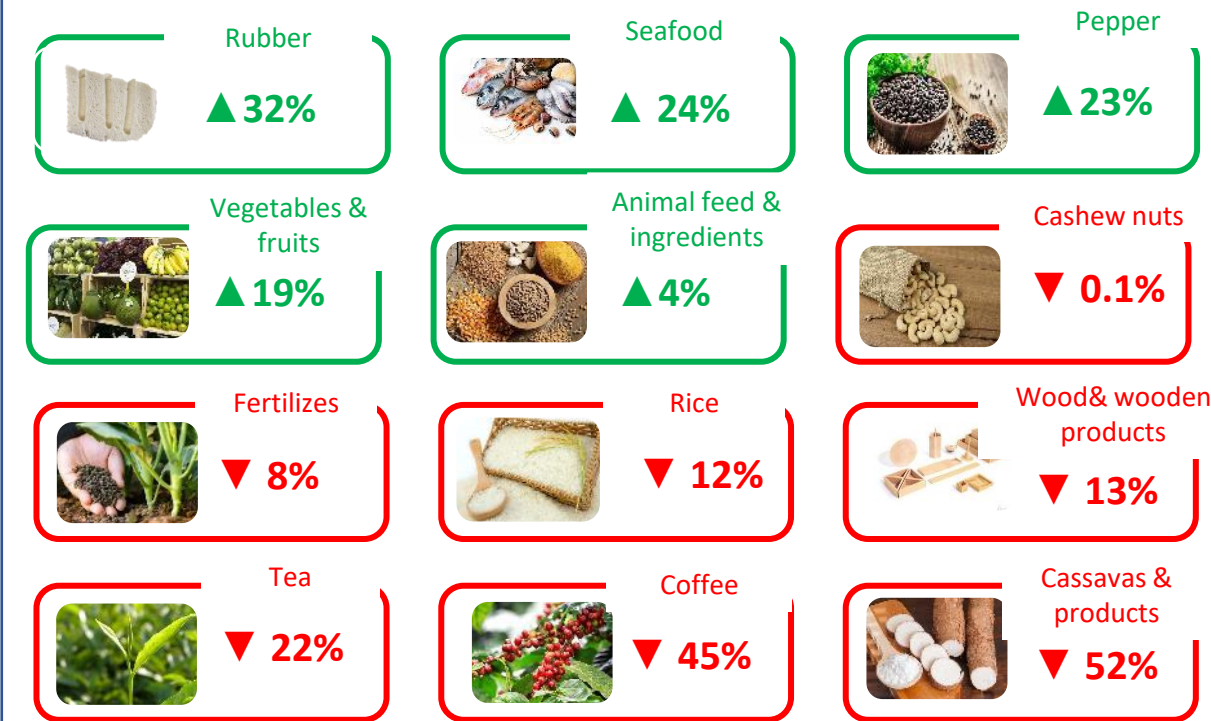


Key AFF product export value to ASEAN, May 2024

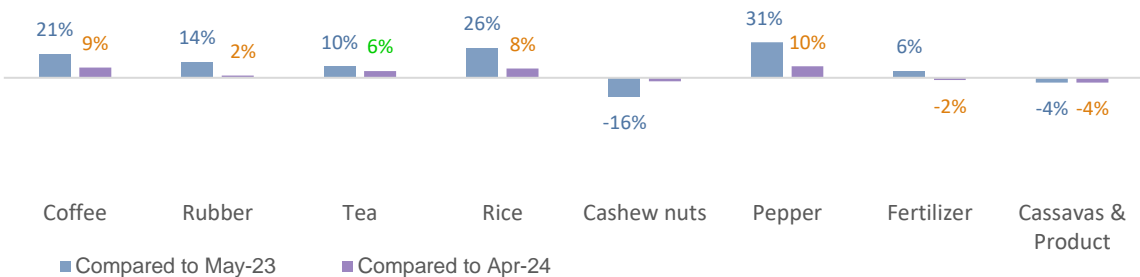


Unit: Mil.USD

Changes in key AFF product export value to ASEAN in May 2024 compared to Apr-2023



Changes in average export value of key AFF products to ASEAN in May-24 compared to May-23 and compared to Apr-24



Source: Calculated from data of the General Department of Customs



# SPOTLIGHTS



**The first ASEAN Food and Trade Fair is being held in Sweden.**



**Singapore customs warns of fraudulent impersonation of new documents.**



## The first ASEAN Food and Trade Fair is being held in Sweden.

On June 15, 2024, the ASEAN Trade and Culinary Fair 2024 was held in Stockholm, Sweden. The event was organized by the ASEAN Committee in Stockholm (ACS), in collaboration with the embassies of six ASEAN countries in Sweden, including Indonesia, Laos, Malaysia, the Philippines, Thailand, and Vietnam. The fair aims to promote ASEAN culture and cuisine to the local business community and consumers.



Source: [conghuong.vn](https://conghuong.vn)

## Singapore customs warns of fraudulent impersonation of new documents.

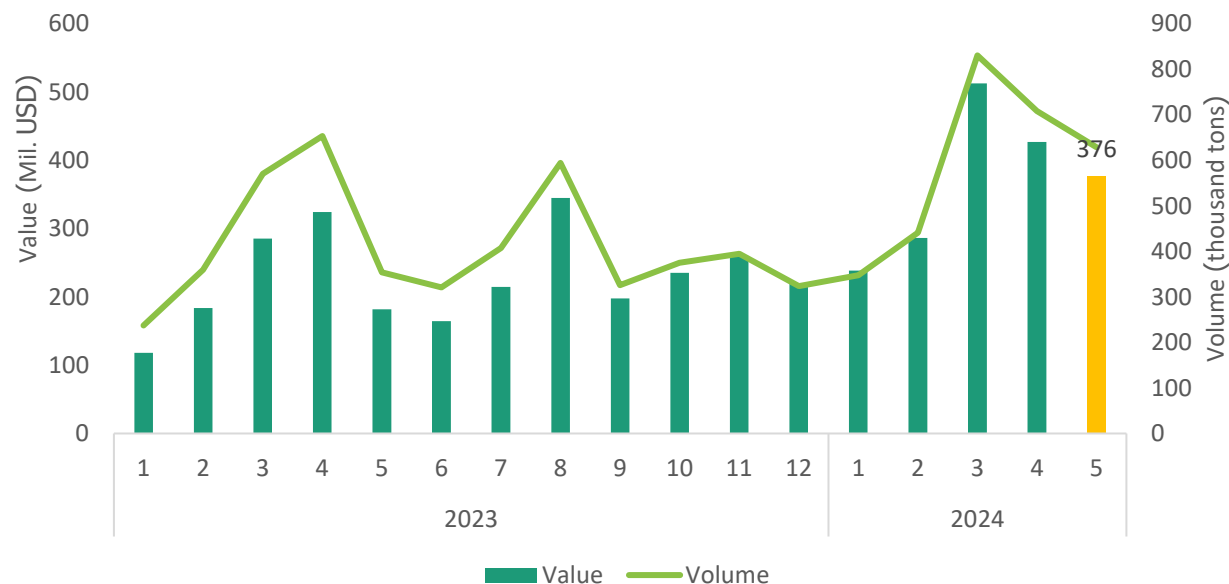
Singapore Customs is alerting the public about the emergence of a new form of document impersonation scam. The documents stipulate that the recipients must make payments to clear their goods through customs. However, Singapore Customs does not require any payment for the clearance of goods. Therefore, even if the documents bear the Customs logo or any correspondence or documents you receive instructing payments to third parties, they are likely to be fraudulent. Furthermore, Singapore Customs advises against opening any unfamiliar attachments in emails or other digital platforms, as they may contain malicious content.

Source: [aecvcci.vn](https://aecvcci.vn)



# RICE

## Export volume and value to ASEAN, May-2024



## Export results to ASEAN, May-2024

**VALUE**  
**376.2** Mil.USD

↘ Decrease **11.9%** compared to Apr-24

↗ Increase **107%** compared to May-23

↗ **148.6 Mil.USD** more than the monthly average rate in 2023

◇ Accumulated 5 months of 2024 reaches **1.8 Bil USD**, and the rate is **67.4%** of the total in 2023.

**VOLUME**  
**628.5** Thousand tons

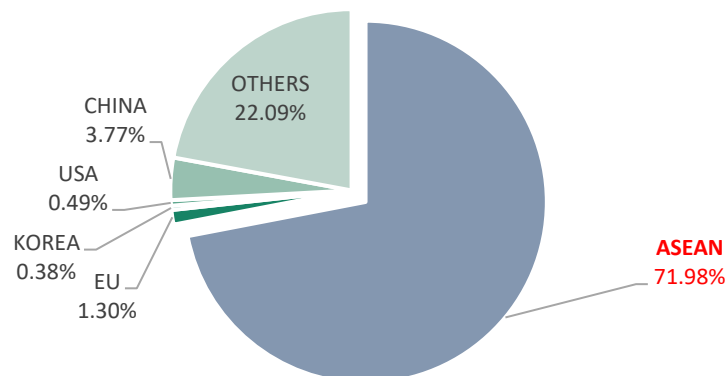
↘ Decrease **11.3%** compared to Apr-24

↗ Increase **77.6%** compared to May-23

↗ **218.7 thousand tons** more than the monthly average rate in 2023

◇ Accumulated 5 months of 2024 reaches **3.0 Mil tons**, and the rate is **60.1%** of the total in 2023.

## Percentage of export value to ASEAN, May-2024



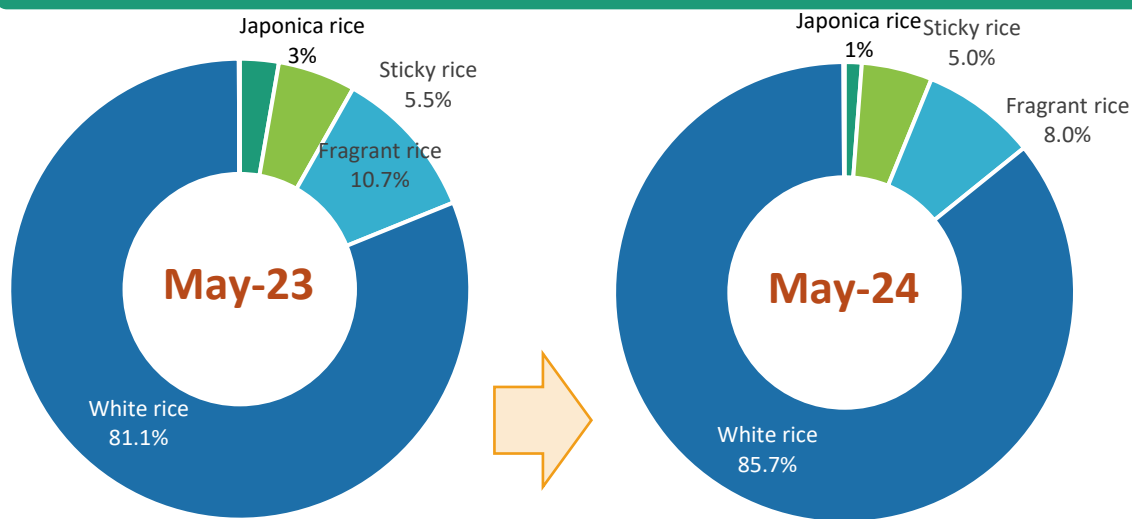
## Changes in percentage of export value to ASEAN, May-2024



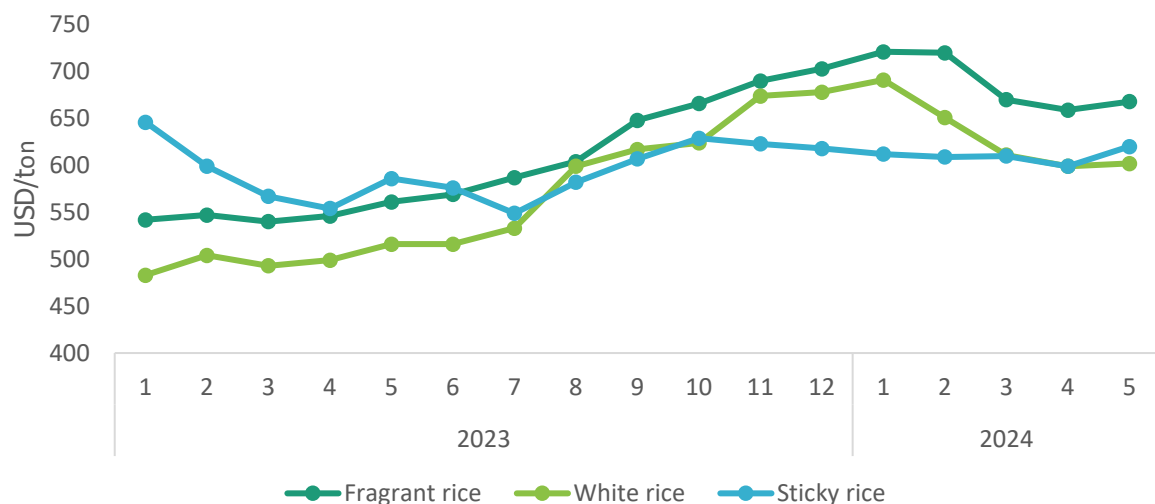


# RICE

## Structure of exports by products to ASEAN, May-2024



## Average export price to ASEAN, May-2024



## Export results to ASEAN, May-2024



### White rice

Value: **322.5** Mil.USD

Decrease **11%** compared to Apr-24

Increase **119%** compared to May-23



### Fragrant rice

Value: **30.3** Mil.USD

Decrease **29%** compared to Apr-24

Increase **56%** compared to May-23



### Sticky rice

Value: **18.6** Mil.USD

Increase **20%** compared to Apr-24

Increase **88%** compared to May-23

### Sticky rice

The average export price in May-24 is **620** USD/ton; Increase **4%** compared to the previous month and Increase **6%** compared to the same month of 2023.

### Fragrant rice

The average export price in May-24 is **668** USD/ton; Increase **1%** compared to the previous month and Increase **19%** compared to the same month of 2023.

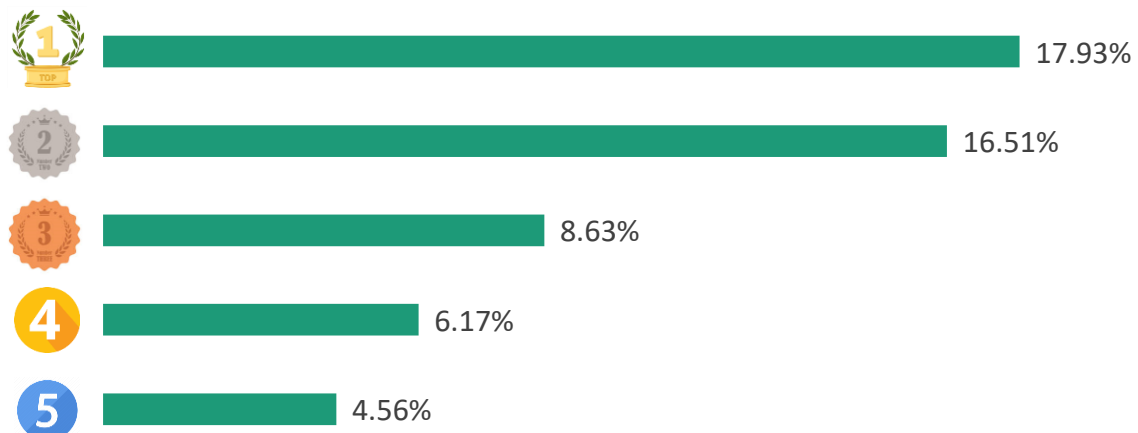
### White rice

The average export price in May-24 is **602** USD/Ton; Increase **0.4%** compared to the previous month and Increase **17%** compared to the same month of 2023.

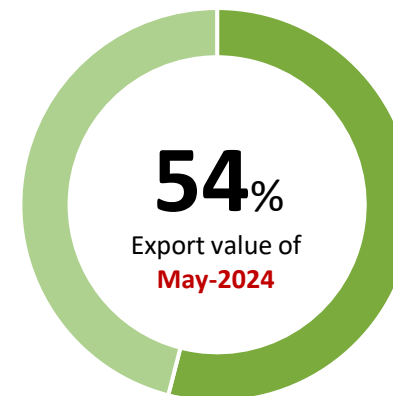


# RICE

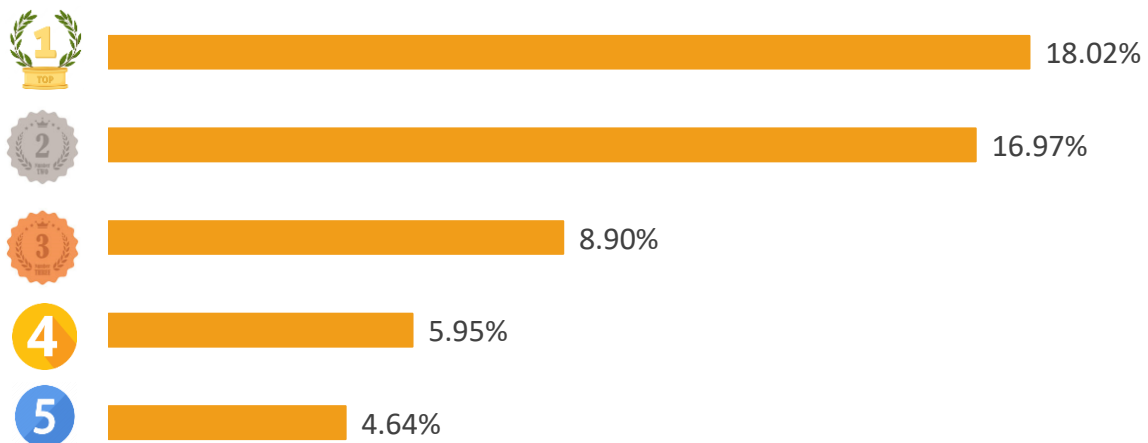
## TOP 5 export enterprises by value to the ASEAN, May-2024



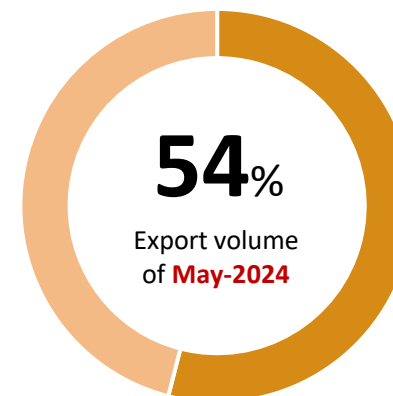
## Value ratio of TOP 5 export enterprises to the ASEAN, May-2024



## TOP 5 export enterprises by volume to the ASEAN, May-2024



## Volume ratio of TOP 5 export enterprises to the ASEAN, May-2024





# RICE

## SPOTLIGHTS

01

The Indonesian government is concerned that the drought conditions over the next four months could lead to a food crisis. The Ministry of Agriculture is implementing a program to distribute 20,000 pumps to drought-affected rice-growing areas across the country to assist farmers in extracting irrigation water from rivers and groundwater sources. The dry weather and reduced cultivated area have caused Indonesia's rice planting area to decrease by 36.9%, down to 6.55 million hectares from October 2023 to April 2024. Data from the Indonesian Ministry of Agriculture indicates that a food crisis could result in 7-16% of the population experiencing food insecurity. With Indonesia's current population at approximately 281.6 million people, about 19.7 to 45 million people could be at risk of food insecurity.

*Source: Thesaigontimes.vn*

02

On June 20, 2024, Philippine President Ferdinand R. Marcos, Jr. issued Executive Order No. 62, which mandates a reduction in import tariffs for various commodities. For rice, the import tariff will be reduced from 35% to 15%, effective until 2028. This can be seen as the latest move by the Philippine government to combat inflation, particularly the continuous rise in rice prices in the market since the beginning of the year. In Q1 2024, the Philippine economy remained relatively stable, except for the price increase of certain essential consumer goods, especially rice, which saw an increase of approximately 24.4% in Q1 2024. Rice prices account for about 9% of the Philippines' Consumer Price Index (CPI).

The effective date of Executive Order No. 62 is 30 days from the date of publication, while the reduced import tariff on rice will take effect 15 days from the date of publication. Therefore, the implementation of the new rice import tariff in the Philippines is expected to commence in early August 2024.

*Source: Moit.gov.vn*





# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024

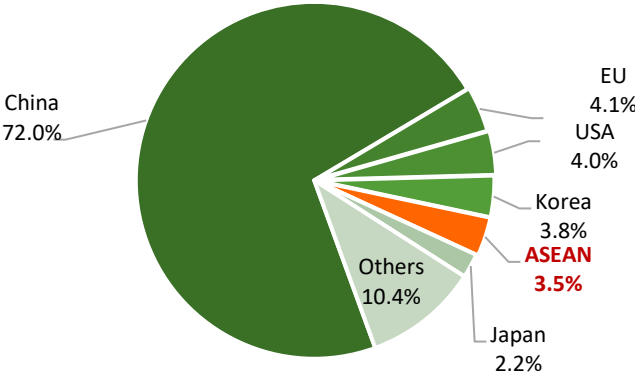
VALUE  
**27.3**  
Mil.USD

Increase **15.9%** compared to Apr-24.

Increase **43.3%** compared to May 23  
**1.4 Mil.USD** more than the monthly average rate in 2023

Accumulated 5 months of 2024 reaches **136.9 Mil.USD**, and the rate is 44.1% of the total in 2023.

## Percentage of export value to the ASEAN, May-2024



## Changes in percentage of export value to the ASEAN, May-2024

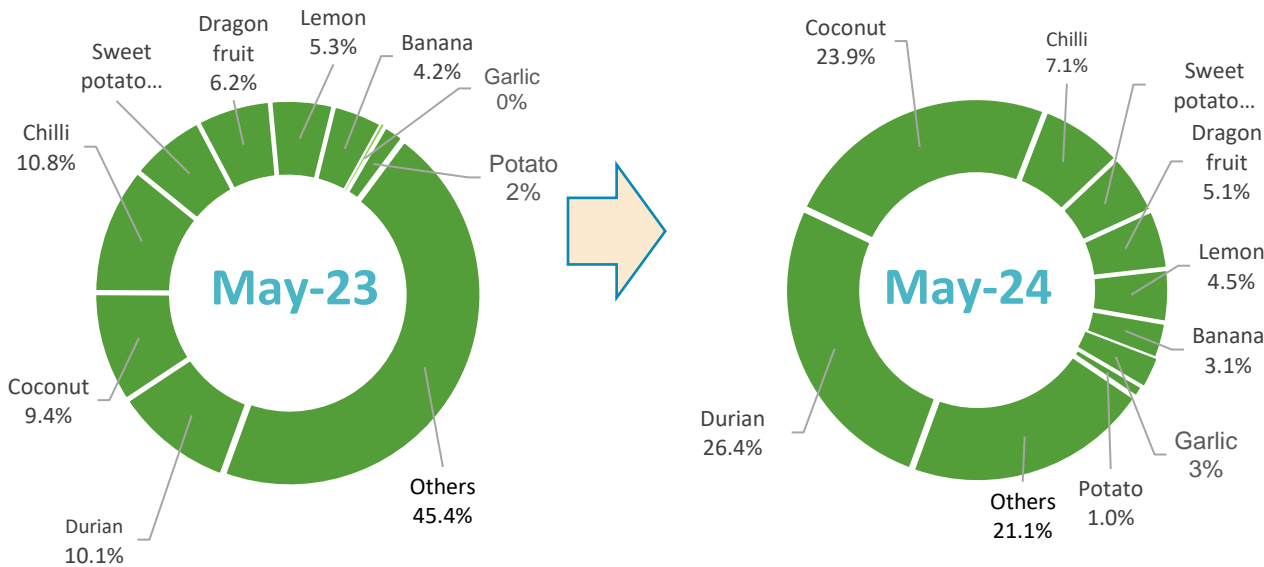






# FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, May-2024



Export results to the ASEAN, May-2024



## Durian

Value: **7.2** Mil.USD  
 Increase **63.2%** so compared to Apr-24  
 Increase **273.3%** compared to May-23



## Coconut

Value: **6.5** Mil.USD  
 Increase **16.9%** compared to Apr-24  
 Increase **264.4%** compared to May-23



## Chilli

Value: **1.9** Mil.USD  
 Increase **21.4%** compared to Apr-24  
 Decrease **5.5%** compared to May-23



## Sweet potato

Value: **1.4** Mil.USD  
 Increase **43.9%** compared to Apr-24  
 Increase **15.7%** compared to May-23



## Dragon fruit

Value: **1.4** Mil.USD  
 Decrease **24.1%** compared to Apr-24  
 Increase **16.4%** compared to May-23



## Lemon

Value: **1.2** Mil.USD  
 Decrease **28.7%** compared to Apr-24  
 Increase **21.9%** compared to May-23



## Banana

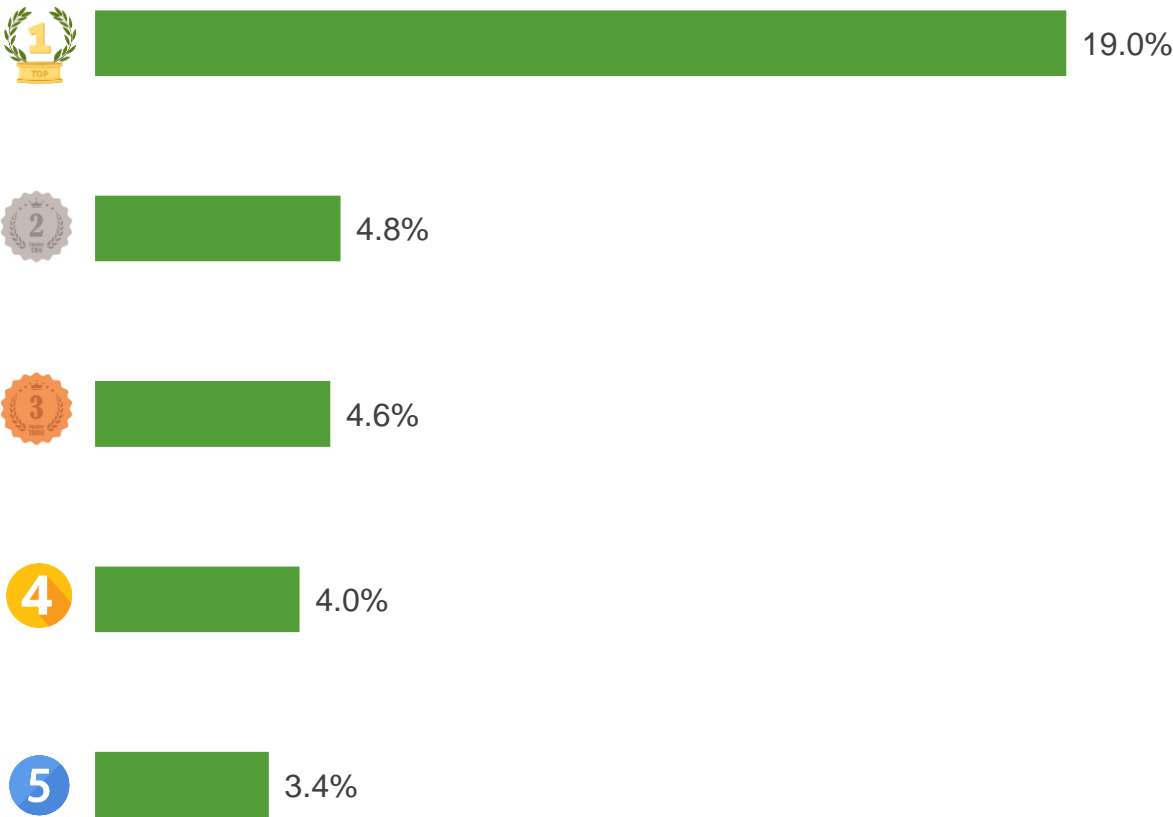
Value: **0.84** Mil.USD  
 Decrease **19.6%** compared to Apr-24  
 Increase **4.8%** compared to May-23

Source: Calculated from data of the General Department of Customs



# FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, May-2024



Value ratio of TOP 5 export enterprises to the ASEAN, May-2024

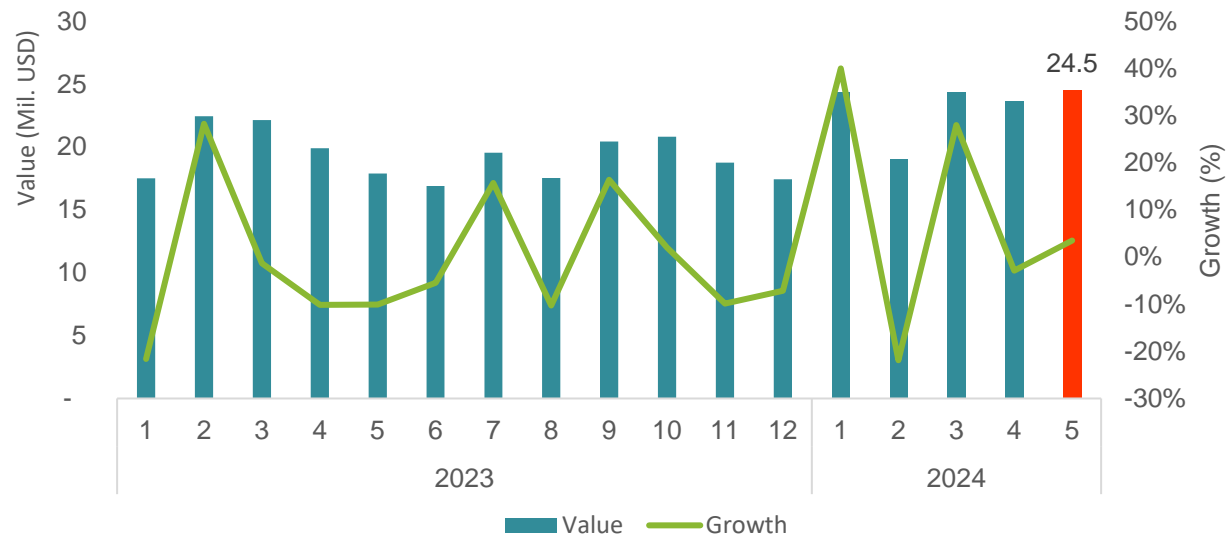


Source: Calculated from data of the General Department of Customs



# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024

### VALUE



24.5

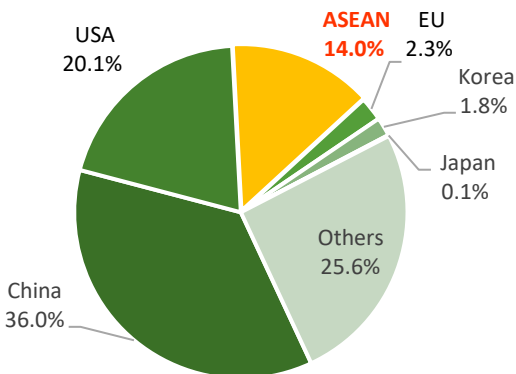
Mil.USD

Increase **3.5%** compared to Apr-24

Increase **37.2%** compared to May-23  
**5.3 Mil.USD** more than the monthly average rate in 2023

Accumulated 5 months of 2024 reaches **116.1 Mil.USD**, and the rate is **50.2%** of the total 2023.

## Percentage of export value to the ASEAN, May-2024



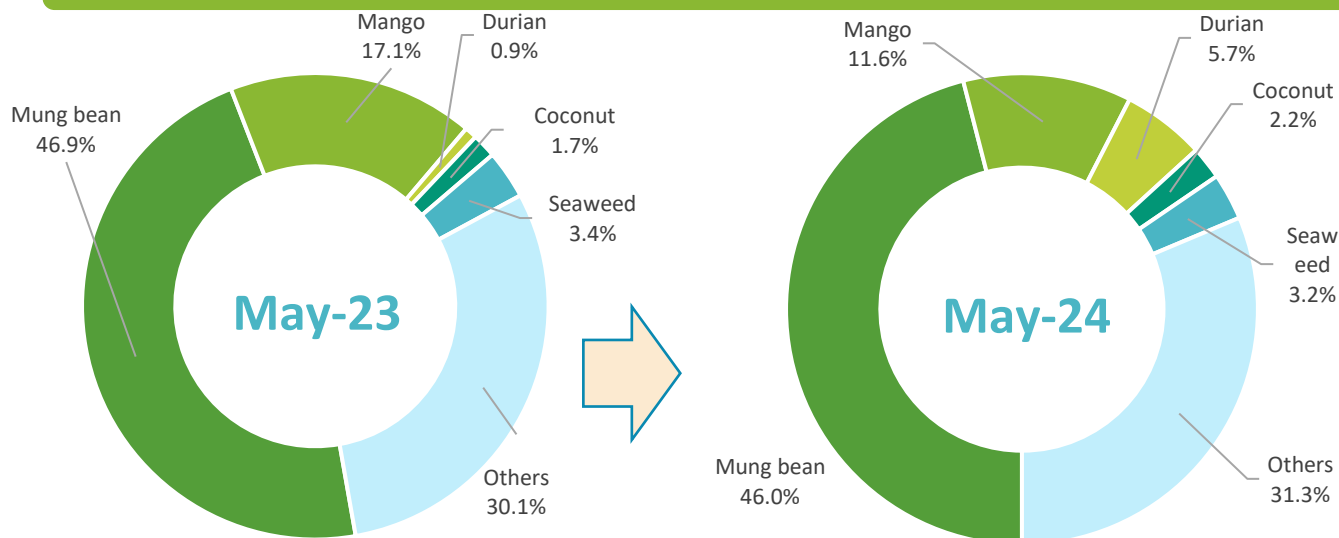
## Changes in percentage of export value to the ASEAN, May-2024





# FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, May-2024



## Durian

Value: **1.4** Mil.USD

Increase **43.4%** compared to Apr-24

Increase **812%** compared to May-23



## Seaweed

Value: **0.79** Mil.USD

Increase **40.1%** compared to Apr-24

Increase **30.1%** compared to May-23

Import results from the ASEAN, May-2024



## Mung bean

Value: **11.3** Mil.USD

Increase **30.3%** compared to Apr-24

Increase **34.5%** với May-23



## Mango

Value: **2.8** Mil.USD

Decrease **57.1%** compared to Apr-24

Decrease **7.3%** compared to May-23



## Coconut

Value: **0.55** Mil.USD

Decrease **11.9%** compared to Apr-24

Increase **83.8%** compared to May-23





### **The Philippines lists genetically modified tomatoes from Japan as conventional varieties.**

The Bureau of Plant Industry (DA-BPI) under the Philippine Department of Agriculture issued a certification (JDC No. 01 s.2021) for genetically edited tomatoes from Japan in May, identifying these genetically edited tomatoes as non-genetically modified organisms (non-GMO) and therefore not requiring a regulatory pathway for the biosafety assessment of this product. This is the second genetically edited crop in the Philippines to be classified as non-GMO.

*Source: Guojiguoshu.com*

### **Foreign durians are flooding into Cambodia; Cambodian authorities have announced the results of their investigation.**

On June 21/ 2024, the General Department of Consumer Protection, Competition, and Fraud Repression (CCF) under the Cambodian Ministry of Commerce issued a notification regarding recent information that many entrepreneurs have been importing durians from neighboring countries, soaking them in chemicals, and then selling them as locally grown durians. The traders claim that their products originate from Cambodian regions such as Kampot, Kampong Cham, Battambang, and Tbong Khmum.

However, according to preliminary investigations, a small quantity of durians has entered Cambodia from neighboring countries through several border checkpoints. The CCF urges traders not to sell durians treated with unknown chemicals to avoid endangering consumer health.

*Source: Astroawani.com*





### **Thailand proposes enhancing the quality of durians.**

According to the proposal from the Thai Trade Promotion Office in Xiamen, Thailand needs to continue developing high-quality fresh durians to maintain its dominance in the Chinese and global markets. The opportunity for importing Thai durians remains strong in China and worldwide, provided that Thai producers continue to adapt and improve in line with consumer demand.

*Source: Guojiguoshu.com*

### **Thailand organizes a durian festival to boost trade with China.**

The Durian Festival was held in Chumphon Province, Thailand, to promote Thai durians and enhance their presence in the Chinese market. The Chinese Consul General in Songkhla, Wu Dongmei, along with representatives from Chinese fruit distributors and logistics companies, attended the event. Over the past five years, the durian cultivation area in Chumphon Province has continued to grow, increasing by 17.38% in 2024 compared to 2023. Chumphon Province is projected to produce over 250,000 tons of durians in 2024, generating an income of more than 33 billion baht (approximately 899.4 million USD).

*Source: Astroawani.com*





02

### **Fresh Malaysian durians are officially exported to China.**

According to Malaysian press reports, Shabu, Director of the Malaysian Ministry of Agriculture and Food Security (MAFS), announced that representatives from China and Malaysia signed the "Protocol on Phytosanitary Requirements for Malaysian Fresh Durian Exported to China" on June 20. Malaysia's durian production in 2022 was 455,458 tons, and production is expected to increase by 11% to 505,853 tons in 2025. According to data published by the Malaysian Ministry of Agriculture, black thorn durian currently accounts for only 1% of Malaysia's total durian production, while Musang King durian accounts for up to 36%.

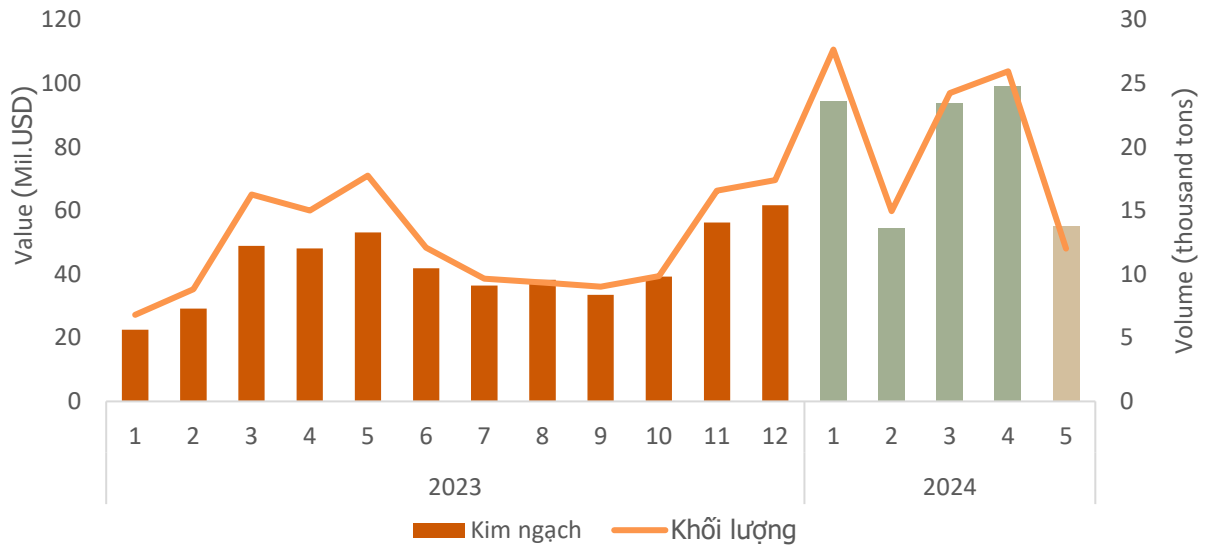
Kampung durian, mainly consumed locally, accounts for 38% of total production, and D24 durian accounts for 11%. In 2023, other countries such as Malaysia and the Philippines accounted for only 10% of the Chinese durian import market. Currently, Malaysian fresh durians have gained access, and exports to China are expected to reach higher levels.



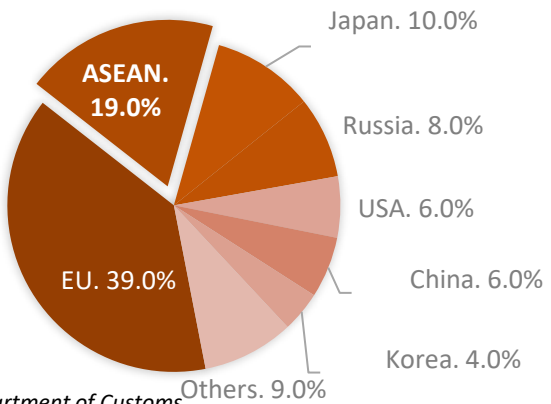


# COFFEE

## Export volume and value to the ASEAN, May-2024



## Percentage of export value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024

**VALUE**

**99.1** Mil.USD

⬇️ Decrease **44.5%** compared to Apr-24

⬆️ Increase **3.5%** compared to May-23

⬆️ **12.6** Mil.USD more than the monthly average rate in 2023.

❖ Accumulated 5 months of 2024 reaches **396.8** Mil.USD, and the rate is **78%** of the total 2023.

**VOLUME**

**25.9** nghìn tấn

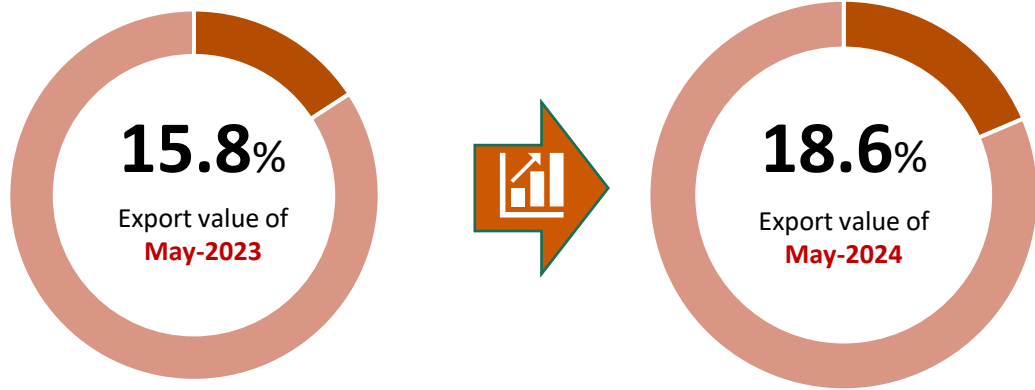
⬇️ Decrease **53.7%** compared to Apr-24

⬇️ Decrease **32.4%** compared to May-23

⬇️ **0.4** thousand tons less than the monthly average rate in 2023.

❖ Accumulated 5 months of 2024 reaches **104.8** thousand tons, and the rate is **70.6%** of the total 2023.

## Changes in percentage of export value to the ASEAN, May-2024

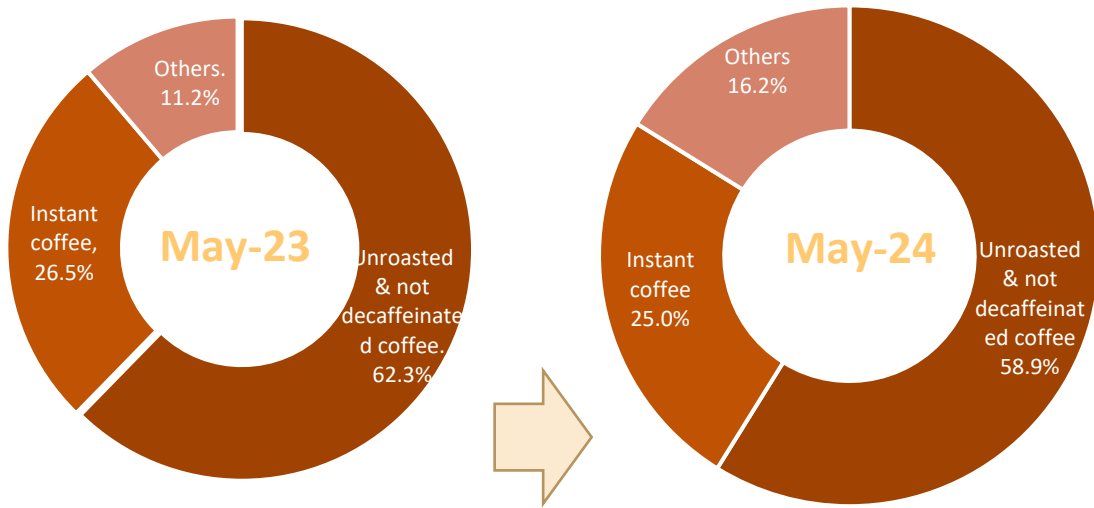


Source: Calculated from data of the General Department of Customs

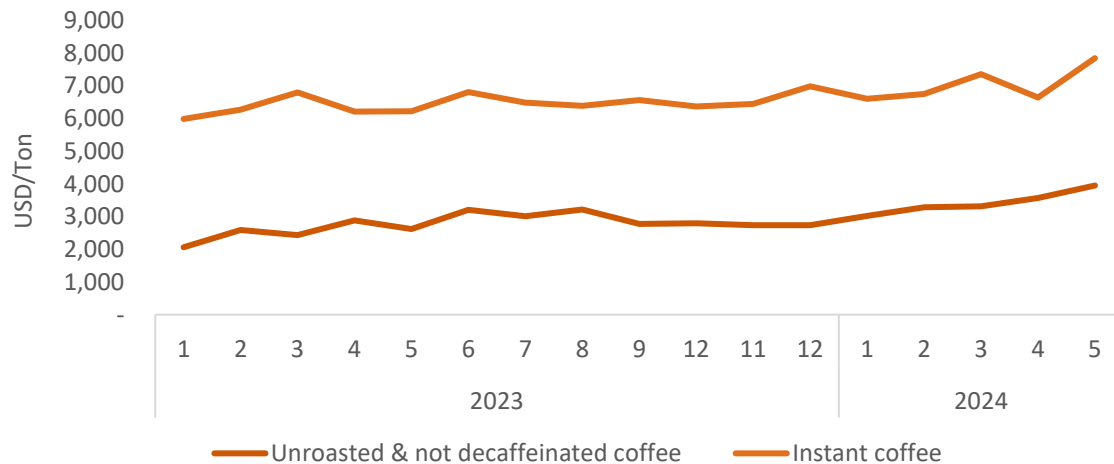


# COFFEE

## Structure of exports by products to the ASEAN, May-2024



## Average export price to to the ASEAN, May-2024



Source: Calculated from data of the General Department of Customs

## Export results to to the ASEAN, May-2024



### Unroasted & not decaffeinated coffee

Value: **32.4** Mil.USD

Decrease **58.1%** compared to Apr-24

Decrease **2.2%** compared to May-23



### Instant coffee

Value: **13.4** Mil.USD

Increase **2.8%** so compared to Apr-24

Decrease **2.3%** compared to May-23



### Others

Value: **7.4** Mil.USD

Increase **10.5%** compared to Apr-24

Increase **62.8%** compared to May-23

### Instant coffee

The average export price in May-24 is **7.838** USD/Ton. Increase **18.2%** compared to the previous month, and Increase **28.1%** compared to the same month of 2023.

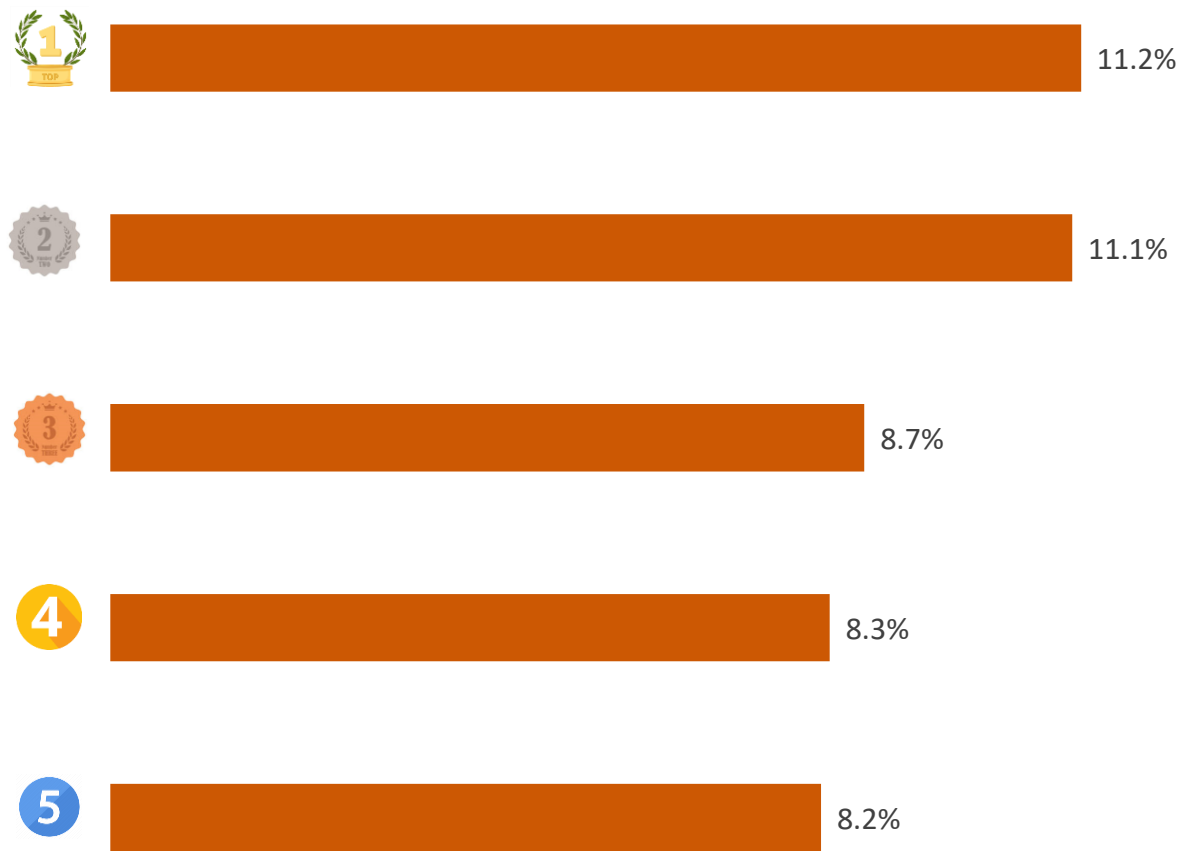
### Unroasted & not decaffeinated coffee

The average export price in May-24 is **3.947** USD/Ton; Increase **10.7%** compared to the previous month, and Increase **51%** compared to the same month of 2023.

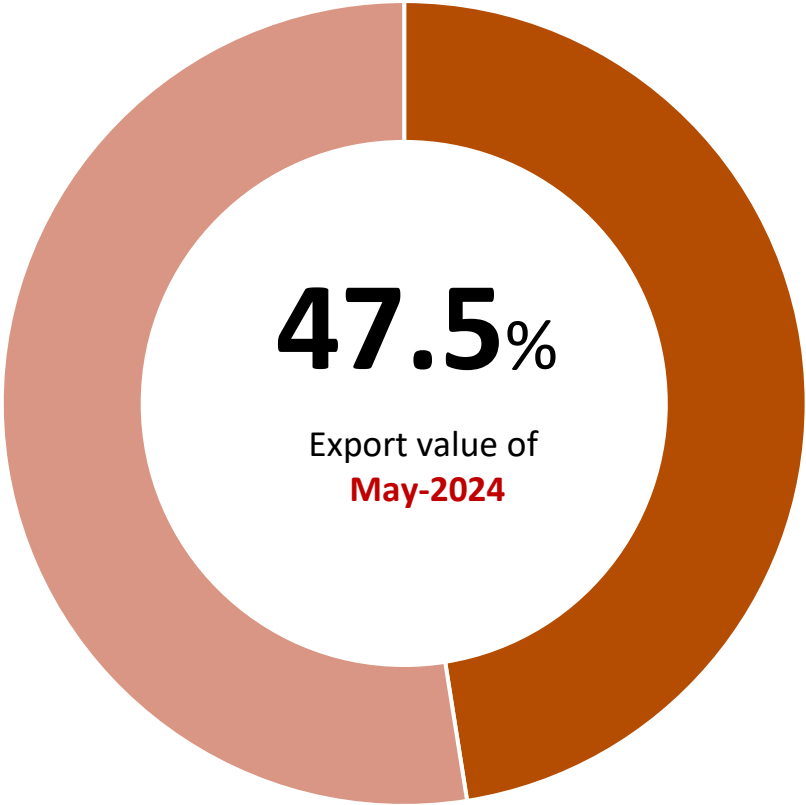


# COFFEE

TOP 5 export enterprises by value to the ASEAN, May-2024



Value ratio of TOP 5 export enterprises to the ASEAN, May-2024



Source: Calculated from data of the General Department of Customs



According to the U.S. Department of Agriculture (USDA), Indonesia's coffee production for the 2024/2025 crop year is estimated to reach 10.9 million bags, an increase of 2.8 million bags compared to the 2023/2024 crop year. Specifically, Robusta coffee production is forecasted to reach 9.5 million bags, up by 2.7 million bags from the previous crop year, due to favourable conditions in the main production regions of Sumatra and Java, where approximately 75% of the country's coffee is grown. Arabica coffee production is expected to see a slight increase to 1.4 million bags.

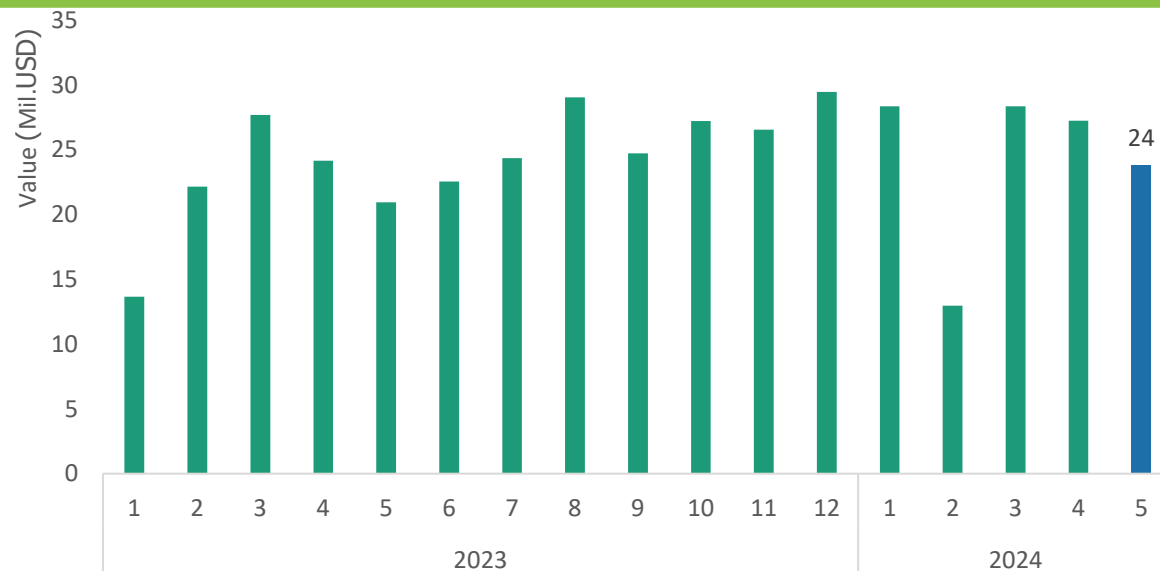
*Source: USDA (6/2024)*





# WOOD & WOODEN PRODUCTS

## Export volume and value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024



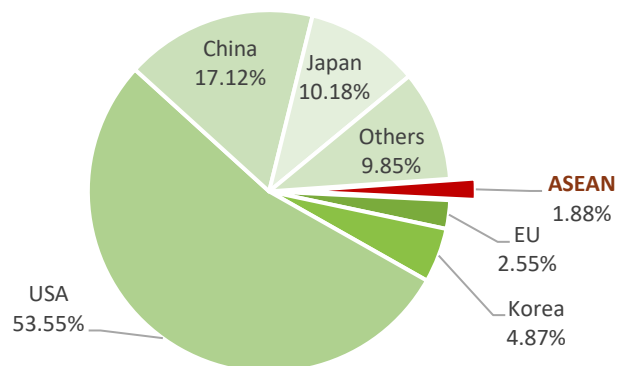
↘ Decrease **12.6%** compared to Apr-24

↗ Increase **13.6%** compared to May-23

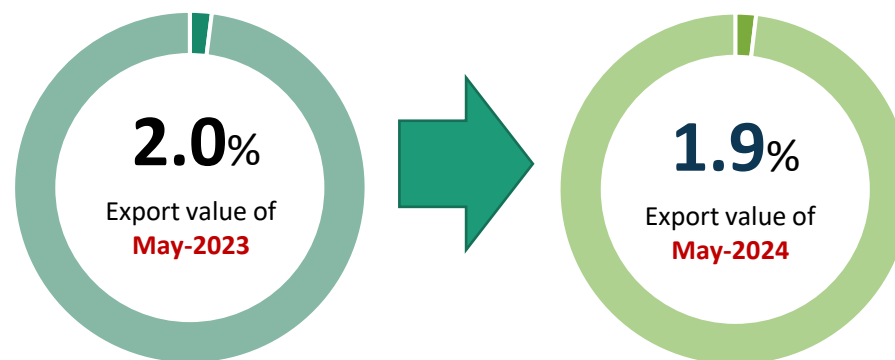
↓ **0.6 Mil.USD** less than the monthly average rate in 2023

❖ Accumulated 5 months of 2024 reaches **120.7** Mil.USD, and the rate is **41.3%** of the total in 2023.

## Percentage of export value to the ASEAN, May-2024



## Changes in percentage of export value to the ASEAN, May-2024

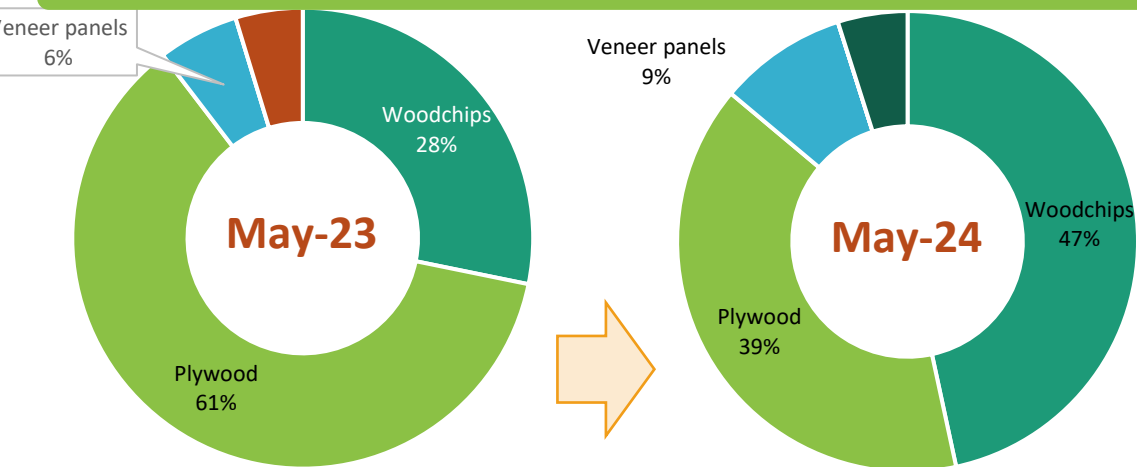






# WOOD & WOODEN PRODUCTS

## Structure of exports by products to ASEAN, May-2024



## Export results to ASEAN, May-2024



### Plywood

Value: **16.6** Mil.USD  
Decrease **23%** compared to Apr-24  
Decrease **1%** compared to May-23



### Woodchips

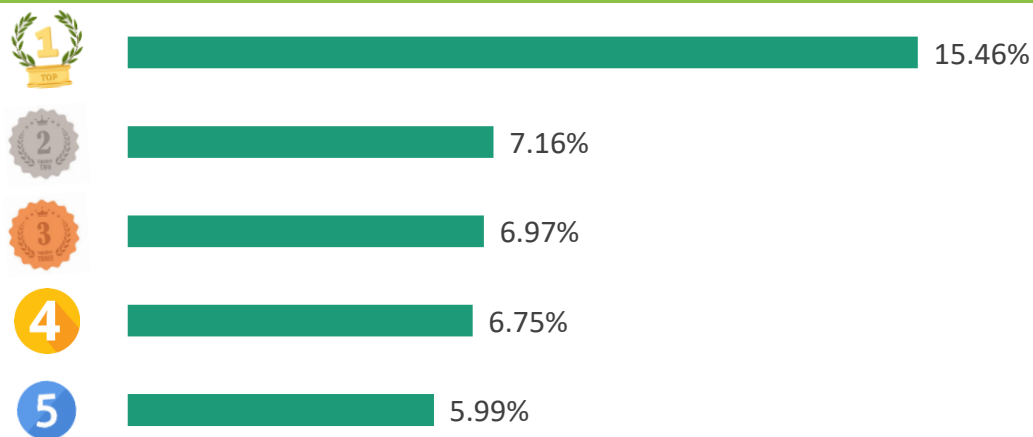
Value: **19.6** Mil.USD  
Decrease **2%** compared to Apr-24  
Increase **154%** compared to May-23



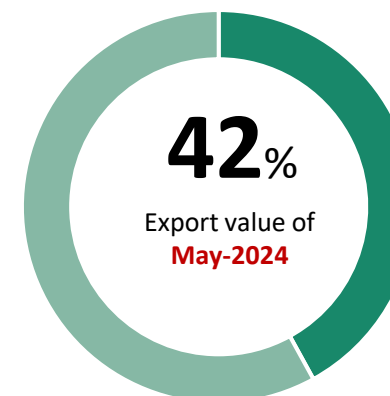
### Venner panel

Value: **3.8** Mil.USD  
Increase **77%** compared to Apr-24  
Increase **144%** compared to May-23

## TOP 5 export enterprises by value to ASEAN, May-2024



## Value ratio of TOP 5 export enterprises to ASEAN, May-2024





# WOOD & WOODEN PRODUCTS

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## SPOTLIGHTS

The Indonesian Furniture and Handicraft Association (HIMKI) is seeking government support to enhance the competitiveness of the national furniture industry. The chairman of HIMKI has called upon the government to play a more proactive role in improving industry productivity, citing examples from China and Vietnam, where significant governmental support has bolstered competitiveness.

The HIMKI chairman also identifies Indonesia's lag in the furniture sector stemming from low demand in traditional markets, particularly the USA and EU. To address this issue, Indonesia's furniture industry needs to focus on the domestic market and other potential non-traditional markets.

He emphasizes that Indonesia should learn from China's experience in increasing furniture exports. While Indonesia's annual average furniture exports have recently reached only USD 2.5 billion, China's exports have reached nearly USD 20 billion.



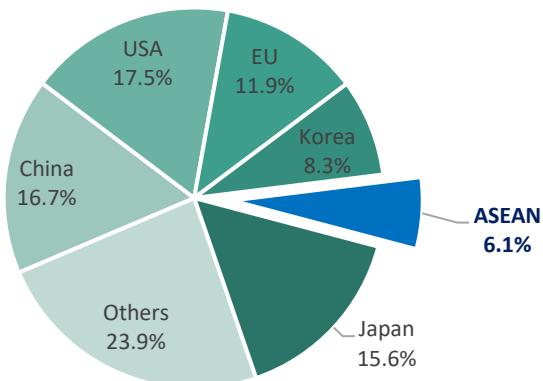


# FISHERIES

## Export value to the ASEAN, May-2024



## Percentage of export value to the ASEAN, May-2024



Source: Calculated from data of the General Department of Customs

## Export results to the ASEAN, May-2024

### VALUE



**50.3** Mil.USD

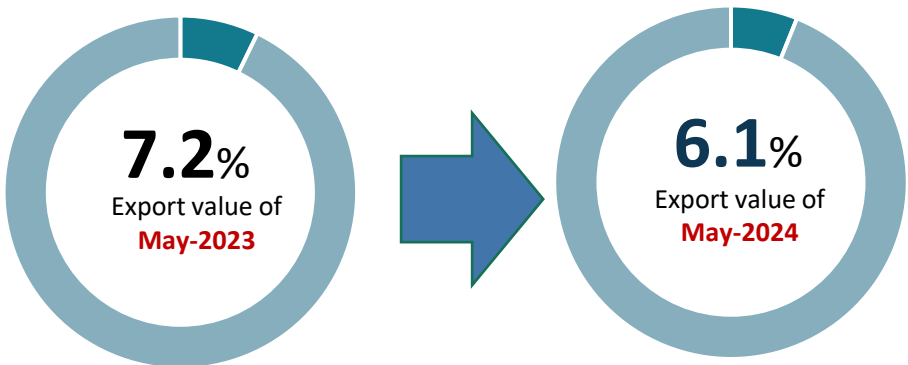
↗ Increase **23.6%** compared to Apr-24

↘ Decrease **13.9%** compared to May-23

↓ **5.8 Mil.USD** less than the monthly average rate in 2023

◇ Accumulated 5months of 2024 reaches **225.6 Mil.USD**, and the rate is **33.5%** of the total in 2023.

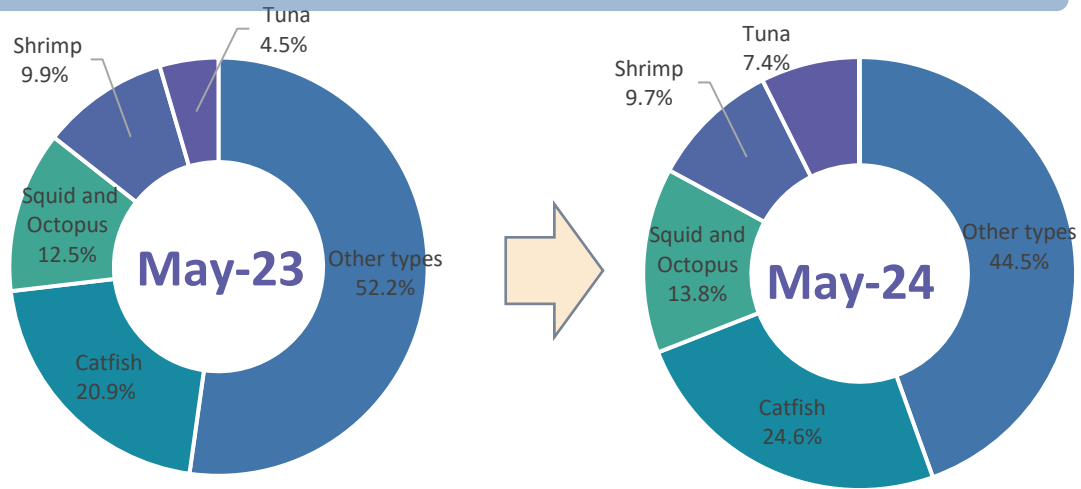
## Change in percentage of export to the ASEAN, May-2024



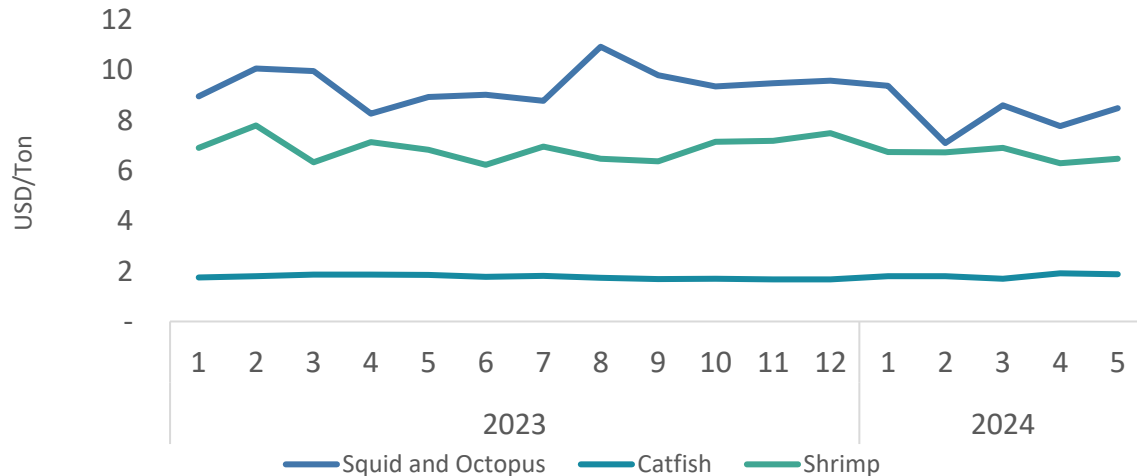


# FISHERIES

## Structure of exports by products to the ASEAN, May-2024



## Average export price to the ASEAN, May-2024



## Export results to the ASEAN, May-2024



### Catfish

Value: **12.4** Mil.USD

Increase **5.1%** compared to Apr-24

Increase **1.1%** compared to May-23



### Squid and Octopus

Value: **7.0** Mil.USD

Increase **99.4%** compared to Apr-24

Decrease **4.5%** compared to May-23



### Shrimp

Value: **4.9** Mil.USD

Increase **13.4%** compared to Apr-24

Decrease **15.5%** compared to May-23

### Squid and Octopus

The average export price in May-24 is **8.5 USD/kg**; Increase **9.2%** compared to the previous month; and Decrease **4.9%** compared to the same month of 2023.

### Catfish

The average export price in May-24 is **1.9 USD/kg**; Decrease **2.4%** compared to the previous month; and Increase **1.6%** compared to the same month of 2023.

### Shrimp

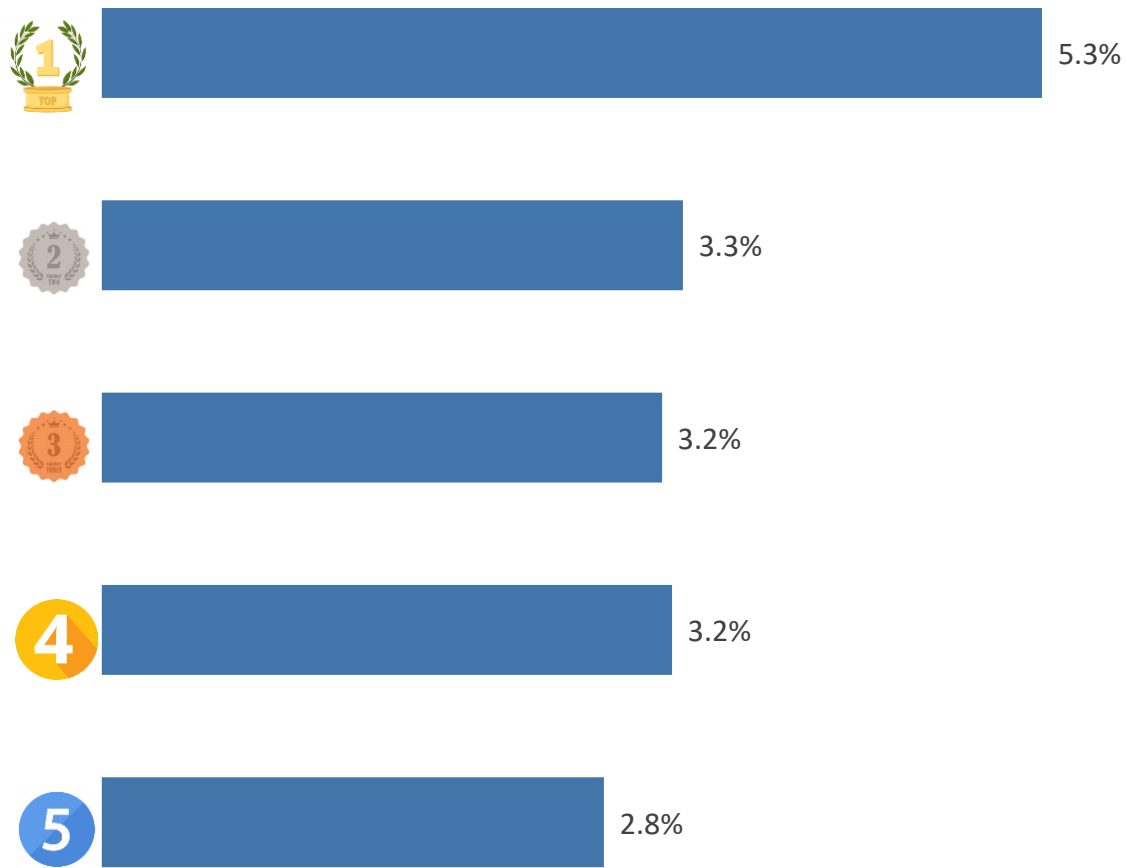
The average export price in May-24 is **6.5 USD/kg**; Increase **3.0%** compared to the previous month; and Decrease **11.8%** compared to the same month of 2023.



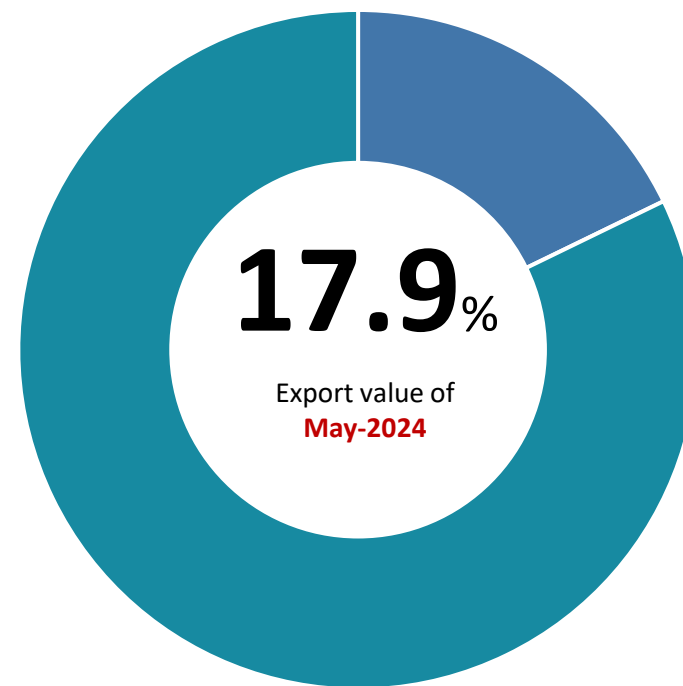


# FISHERIES

## TOP 5 export enterprises by value to the ASEAN, May-2024



## Value ratio of TOP 5 export enterprises to the ASEAN, May-2024



01

### **Thailand has tightened seafood import procedures.**

The Department of Fisheries of Thailand has issued a new notification on seafood import procedures, effective from May 7, 2024. This new notification, referred to as the Regulations, Methods, and Conditions for Applying and Issuing Import Permits for Seafood or Seafood Products, aims to tighten seafood import procedures in response to concerns over declining domestic seafood prices due to excess imports.

Key changes in the new import procedures include:

- For imports of multiple types of seafood mixed with wild-caught seafood, a packing list must be provided, except for cases where imports are in boxes listing necessary details such as species and quantity of packaged seafood.
- Importers must specify the warehouse location and seafood logistics center in regulatory documents for inspection by authorities.
- Imported goods from non-Thai fishing vessels must clearly state the import notification number in the documentation required for port entry.



Source: Vasep (6/2024)



02

### Indonesia is diversifying its shrimp export markets in response to U.S. tariffs.

After the United States issued preliminary decisions on anti-dumping and countervailing duties for shrimp imported from India, Ecuador, Indonesia, and Vietnam, the Indonesian government has planned to diversify its shrimp export markets. Targeted markets include China, Japan, Australia, and South Korea. This initiative by the Ministry of Maritime Affairs and Fisheries (KKP) aims to mitigate the impact of U.S. tariff regulations on frozen shrimp exports to that market. According to ITC Export Potential data, these four target markets could potentially generate \$800 million for Indonesia, equivalent to exporting 121,000 metric tons of frozen shrimp.

Additionally, in response to the U.S. anti-dumping and countervailing duties regulations, the Indonesian government will continue to collaborate with the shrimp industry to ensure smooth shipments to the U.S. KKP has sent letters to the Indonesian Embassy in Washington DC seeking support and information from U.S. agencies. This move paves the way for hearings to protect Indonesian frozen shrimp ahead of the U.S.'s preliminary anti-dumping decisions.

In April 2024, Indonesia was the second-largest shrimp source for the U.S., exporting 10,390 metric tons valued at \$78.5 million, down 23% in volume and 15% in value compared to the same period last year. In the first four months of the year, Indonesia exported 41,306 metric tons of shrimp to the U.S., totaling \$307.9 million, reflecting an 18% decrease in volume and 25% decrease in value compared to the same period last year.

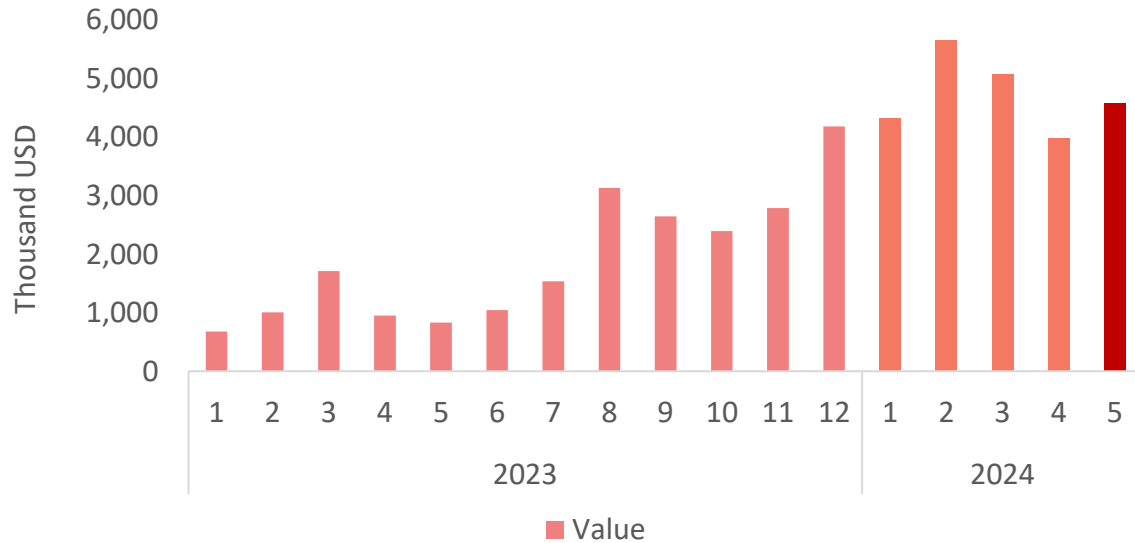
Source: Vasep (6/2024)



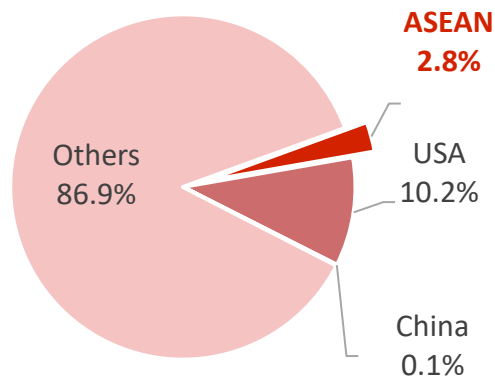


# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to the ASEAN, May-2024



## Percentage of export value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024



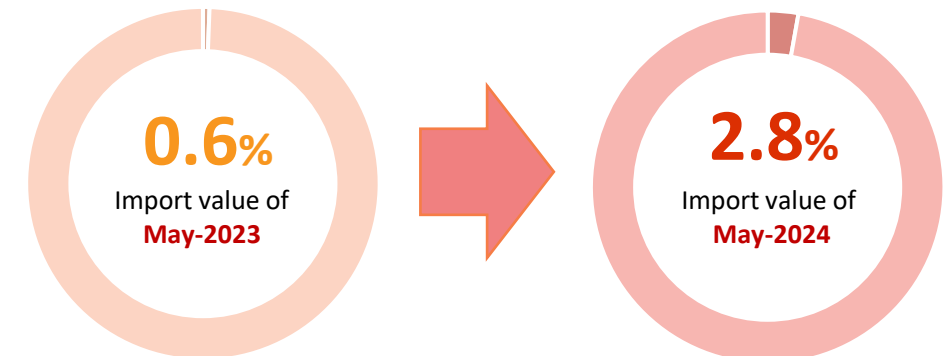
4.6

Mil.USD

Value

- ↗ Increase **15%** compared to Apr-24
- ↗ Increase **451%** compared to May-23
- ↗ **2.7 Mil.USD** more than the monthly average rate in 2023
- ◇ Accumulated 5 months of 2024 reaches **23.6 Mil.USD**, and the rate is **103%** of the total 2023.

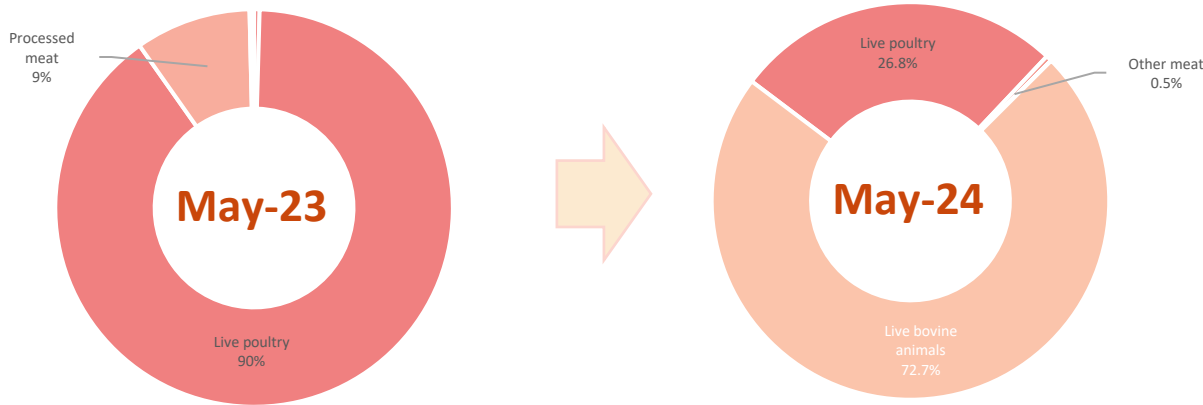
## Changes in percentage of export value to the ASEAN, May-2024





# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to the ASEAN, May-2024



## Export results to the ASEAN, May-2024



### Live bovine animals

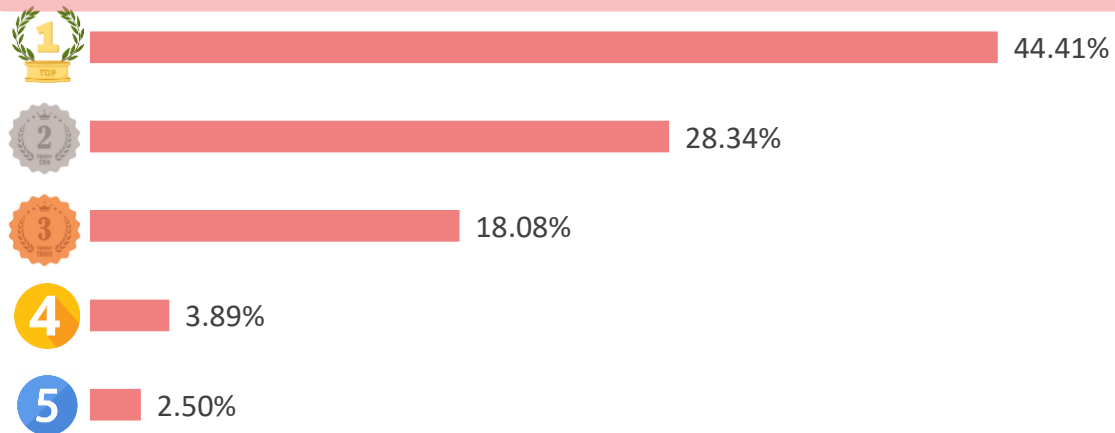
Value: **3.3** Mil.USD  
Increase **31%** compared to Apr-24



### Live poultry

Value: **1.2** Mil.USD  
Decrease **2.7%** compared to Apr-24  
Increase **64%** compared to May-23

## Percentage of export value to the ASEAN, ASEAN, May-2024



## Changes in percentage of export value to the ASEAN, May-2024



Source: Calculated from data of the General Department of Customs





# MEAT & MEAT PRODUCTS

## SPOTLIGHTS

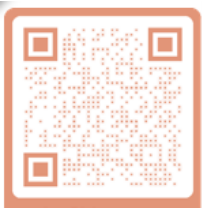


According to data from the National Meat Inspection Service of the Philippines, as of May 13th, the pork inventory in the Philippines stands at 49,899 metric tons. This inventory consists primarily of imported products.

*Source: Vietnambiz.vn*

On June 20, 2024, the Philippine Minister of Agriculture issued a ban on the importation of live goats from the United States following positive test results for Q fever in some imported goats from the U.S. Additionally, the directive allows for shipments currently in transit to enter the country under quarantine inspection rules and testing requirements.

*Source: Tridge.com*





Any comments, please send to:

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