

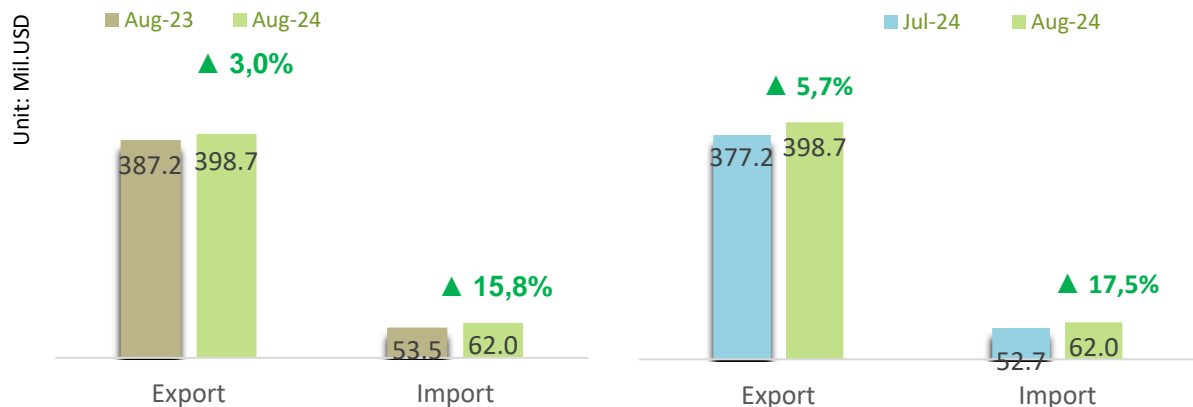
MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

**FROM VIETNAM TO
JAPAN MARKET**

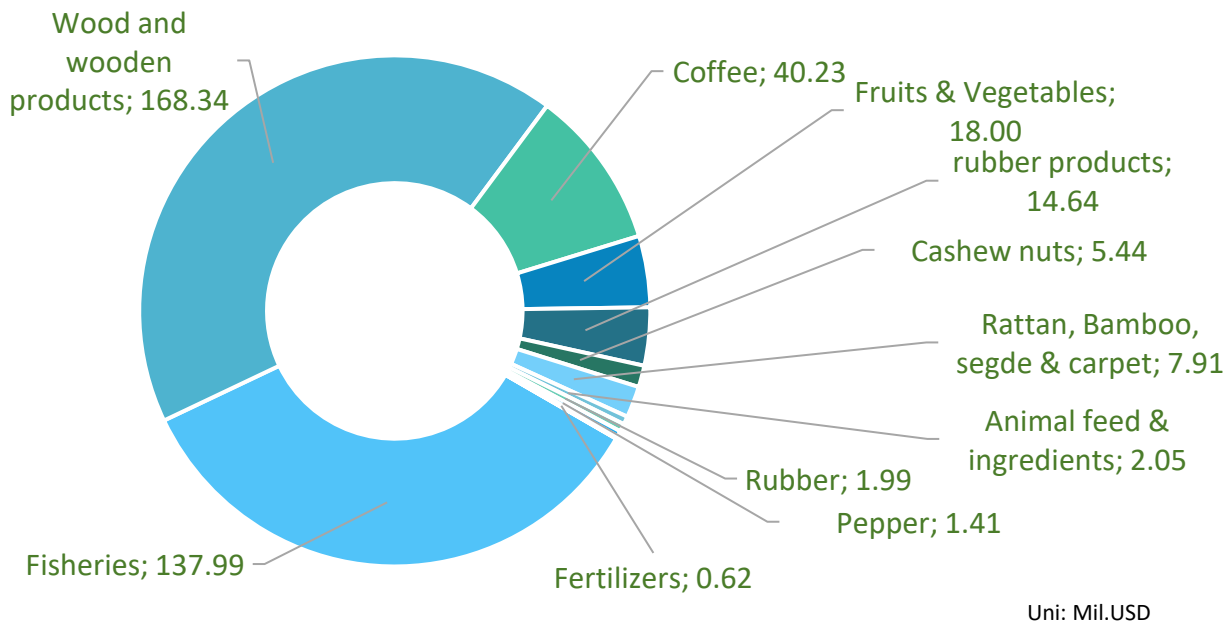


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO JAPAN IN AUGUST 2024

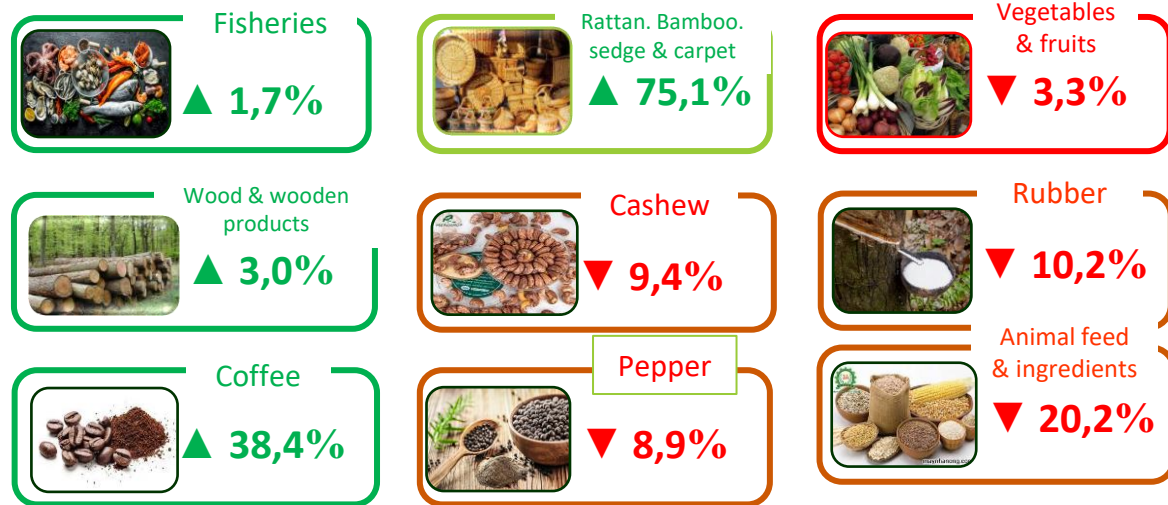
AFF product import-export turnover between Vietnam and Japan, Aug-2024



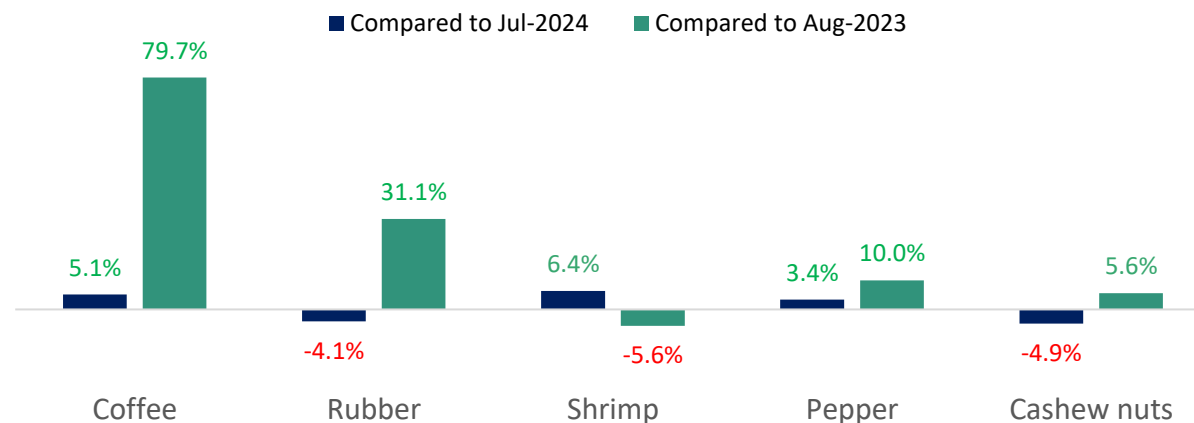
Key AFF product export value to Japan, Aug-2024



Changes in key AFF product export value to Japan, Aug-2024 compared to Jul-2024



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



Japan faces rice shortage pressure

Japan is facing its worst rice shortage in three decades, with prices skyrocketing and rice often missing from supermarket shelves. Several factors contribute to the crisis, including the hottest summer on record, rising demand for sushi due to an influx of foreign tourists, and years of flawed agricultural policies. Many supermarkets are now restricting customers to one bag of rice, while online orders are frequently canceled or subject to lotteries.

In June, private-sector rice inventories hit their lowest levels since 1999. A standard 5 kg bag of rice now costs 3,000 yen (USD 21), marking a 60% increase from last year. Japanese government officials are reexamining the nation's food system. Japan is only 38% self-sufficient in food production overall but is fully self-sufficient in rice. However, strict government control over rice imports and limits on domestic production to keep prices high have left the country vulnerable to supply disruptions.

Although the upcoming summer rice harvest is expected to alleviate the shortage, experts warn it may lead to renewed

shortages next year. With the number of rice farmers in decline, concerns are growing over Japan's ability to secure a stable rice supply in the future.

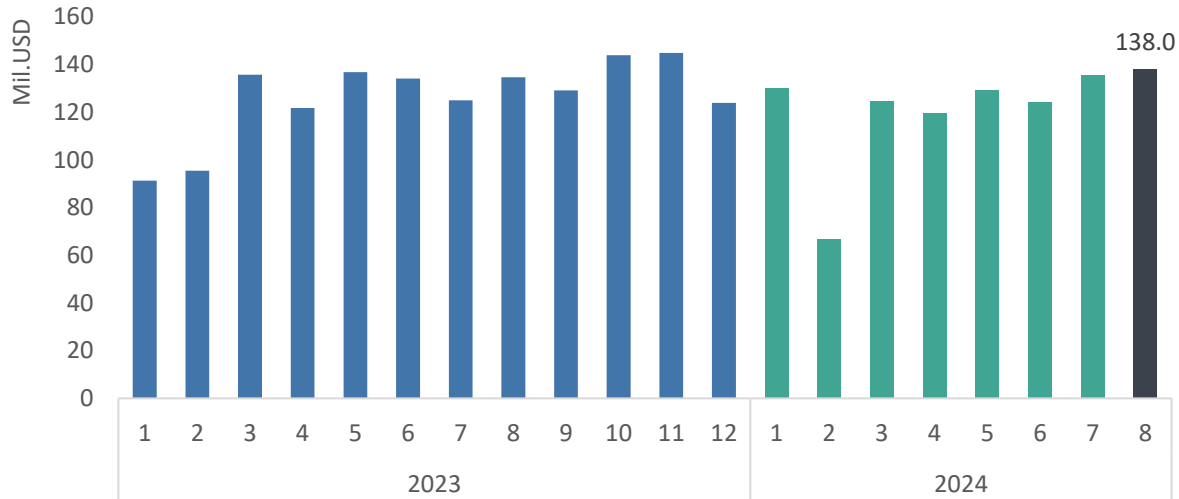
Source: Vneconomy.vn





FISHERIES

Export value to Japan, Aug-2024



Export results to Japan, Aug-2024

Value
138,0 Mil.USD



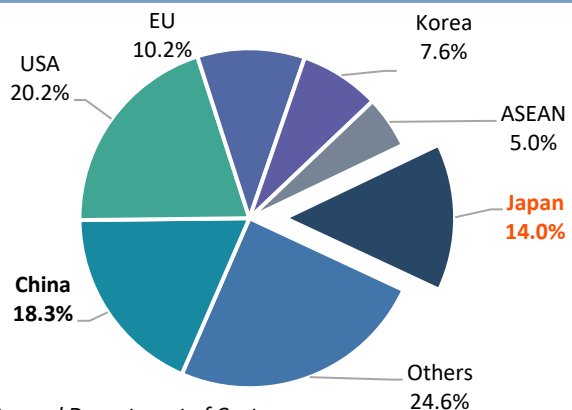
➔ Increase **1,7%** compared to Jul-2024

➔ Increase **2,5%** compared to Aug-2023

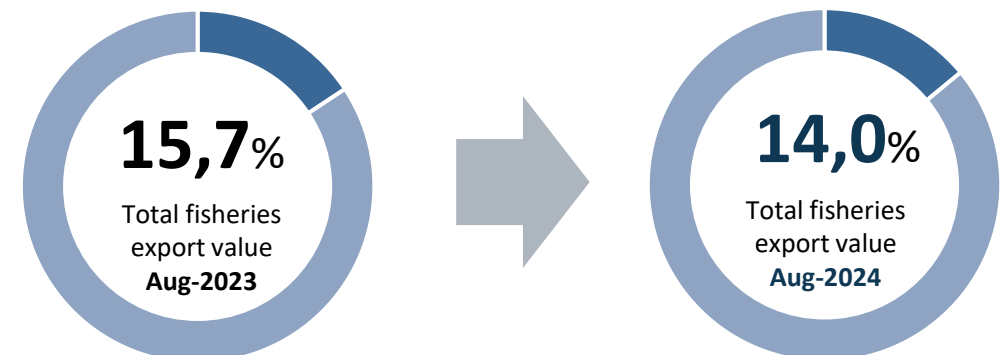
▲ **11,6** Mil.USD higher than monthly average in 2023

❖ Accumulated 8 months 2024 reached **968,4** Mil.USD, equal to **63,9%** of value in 2023

Percentage of export value to Japan, Aug-2024



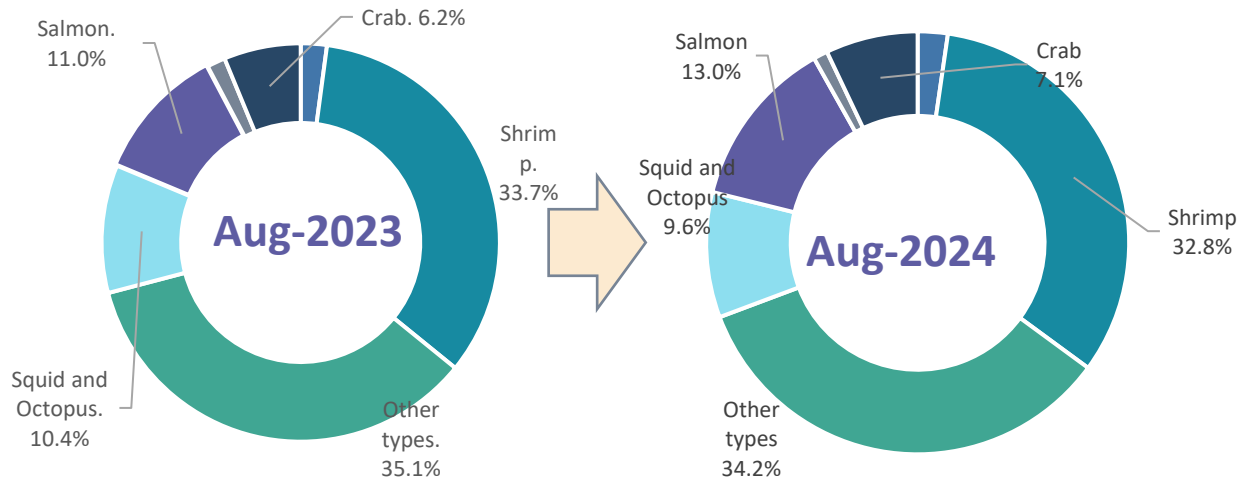
Changes in percentage of export results to Japan, Aug-2024





FISHERIES

Structure of exports by products to Japan, Aug-2024



Export results to Japan, Aug-2024



Salmon

Value: **17,9** Mil.USD

Increase **4,5%** compared to Jul-2024

Increase **21,5%** compared to Aug-2023



Shrimp

Value: **45,2** Mil.USD

Decrease **6,9%** compared to Jul-2024

Decrease **0,4%** compared to Aug-2023



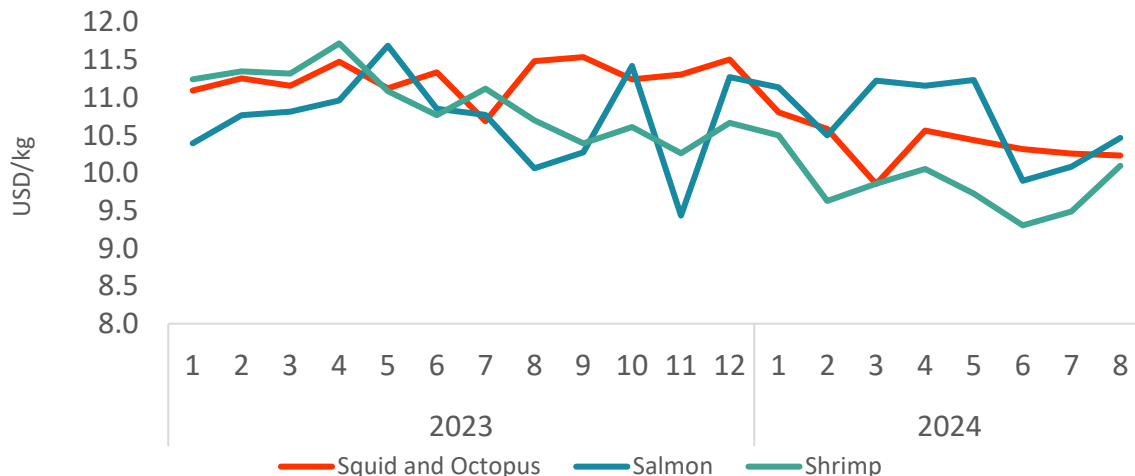
Squid and Octopus

Value: **13,2** Mil.USD

Increase **18,3%** compared to Jul-2024

Decrease **5,5%** compared to Aug-2023

Average export price to Japan, Aug-2024



Squid and Octopus

The average export price in Jul-2024 is **10,2** USD/kg; Increase **6,4%** compared to the previous month; and Decrease **10,9%** compared to the same month of 2023.

Salmon

The average export price in Jul-2024 is **10,5** USD/kg; Increase **3,8%** compared to the previous month; and Increase **4,0%** compared to the same month of 2023.

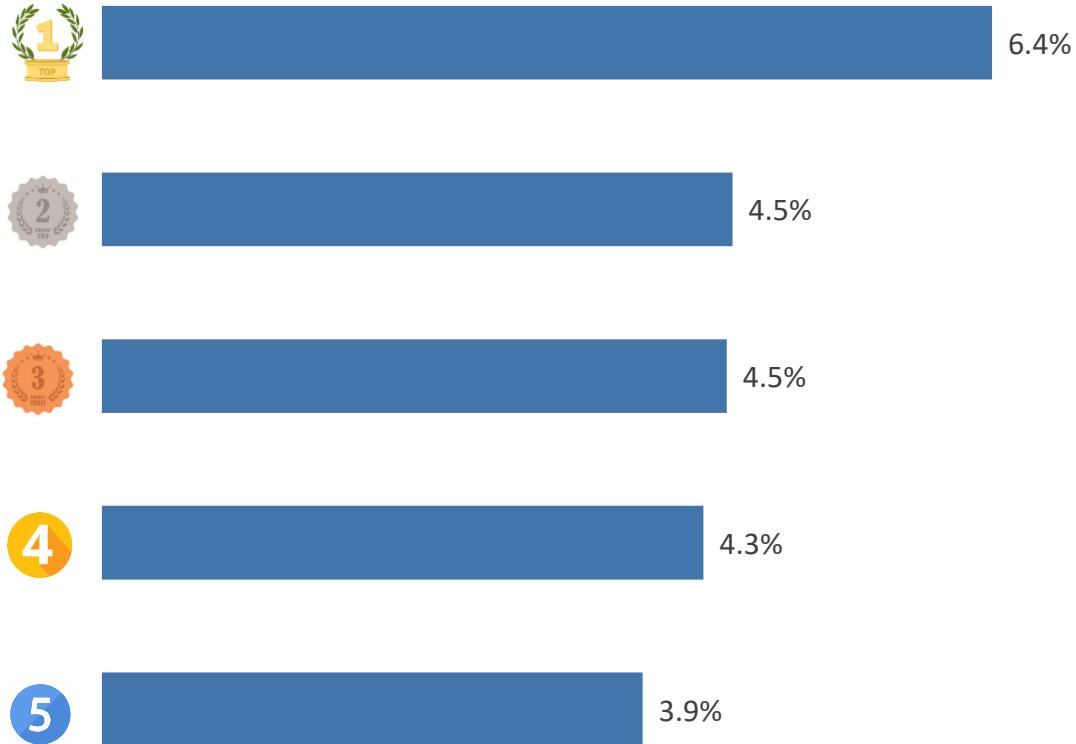
Shrimp

The average export price in Jul-2024 is **10,1** USD/kg; Increase **6,4%** compared to the previous month; and Decrease **5,6%** compared to the same month of 2023.

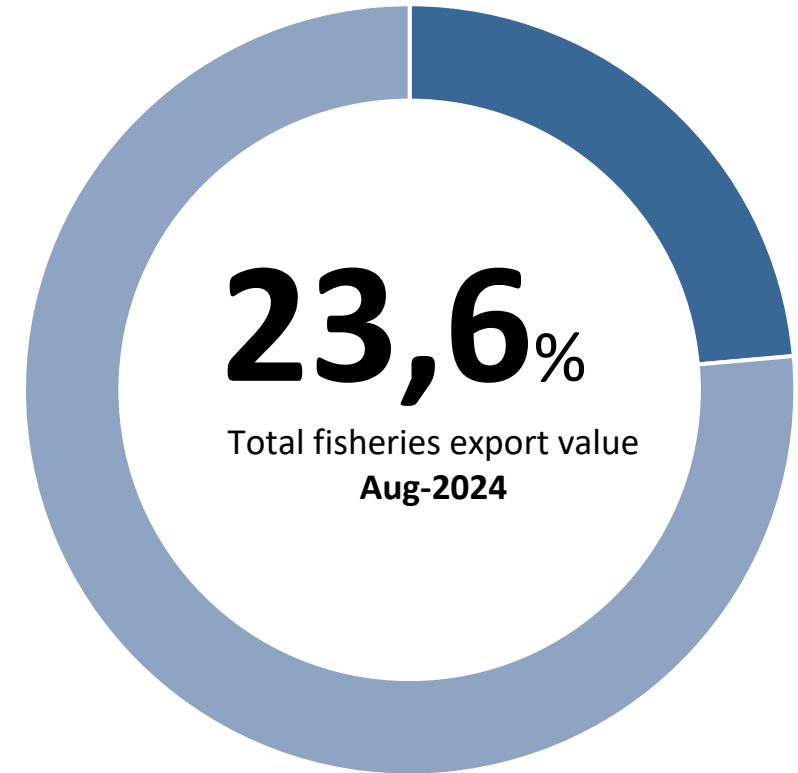


FISHERIES

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



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



Japan agrees to stricter monitoring of treated water from Fukushima plant

On September 20, 2024, Japan agreed to extend long-term monitoring of the treated water from the Fukushima Daiichi nuclear power plant, including inspections by third-party officials, such as those from China. This step aims to encourage China to lift its ban on Japanese seafood imports, according to Prime Minister Fumio Kishida.

China's Ministry of Foreign Affairs welcomed the agreement, stating it would "gradually resume imports" if the agreed conditions are met. However, China still opposes the discharge of water from the Fukushima plant into the Pacific Ocean.

Japan's fishing industry has been heavily affected by China's import ban, and the potential lifting of the ban is seen as a positive development for Japanese fishermen. While the exact timeline for fully removing the ban remains uncertain, Japan hopes the enhanced monitoring system will reassure Beijing and lead to the resumption of seafood trade between the two countries.

Source: The Japantimes





FRUITS & VEGETABLES (EXPORT)

Export value to Japan, Aug-2024



Export results to Japan, Aug-2024

Value
18,0
Mil.USD

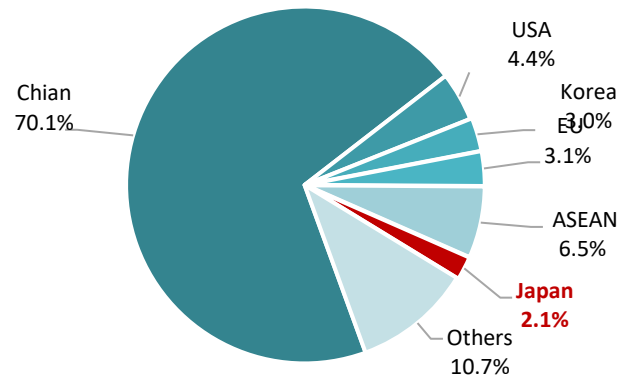
Decrease **3,3%** compared to Jul-2024

Increase **3,8%** compared to Aug-2023

3,3 Mil.USD higher than monthly average in 2023

Accumulated 8 months 2024 reached **135,5 Mil.USD**, equal to **76,9%** of value in 2023

Percentage of export value to Japan, Aug-2024



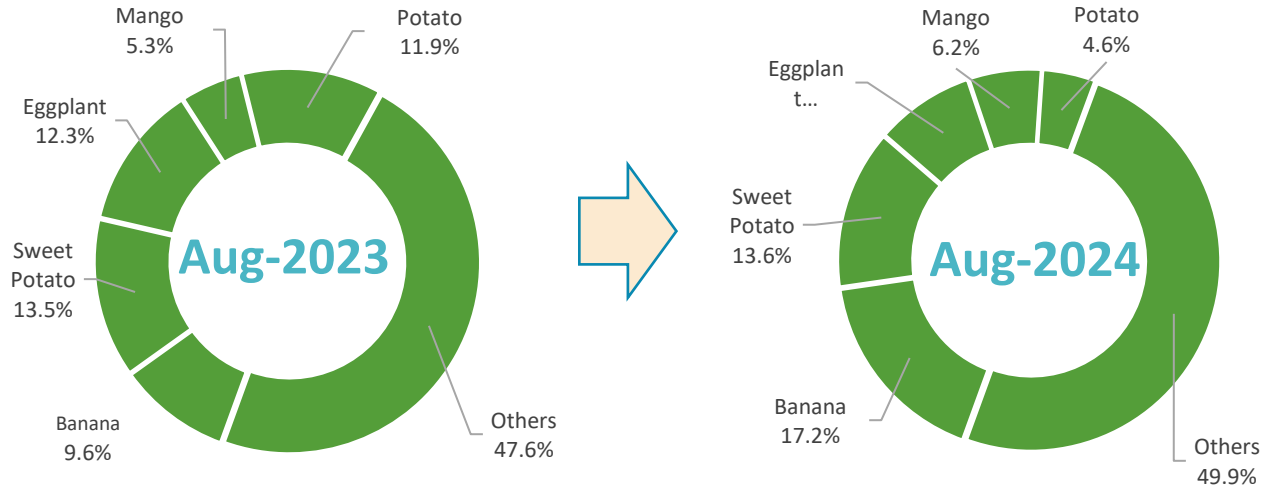
Changes in percentage of export results to Japan, Aug-2024





FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to Japan, Aug-2024



Export results to Japan, Aug-2024



Banana

Value: **3,1** Mil.USD

Increase **1,6%** compared to Jul-2024

Increase **86,1%** compared to Aug-2023



Sweet Potato

Value: **2,5** Mil.USD

Increase **16,8%** compared to Jul-2024

Increase **4,8%** compared to Aug-2023



Eggplant

Value: **1,5** Mil.USD

Decrease **8,7%** compared to Jul-2024

Decrease **28,1%** so compared to Aug-2023



Mango

Value: **1,1** Mil.USD

Decrease **35,3%** compared to Jul-2024

Increase **23,2%** compared to Aug-2023



Potato

Value: **0,82** Mil.USD

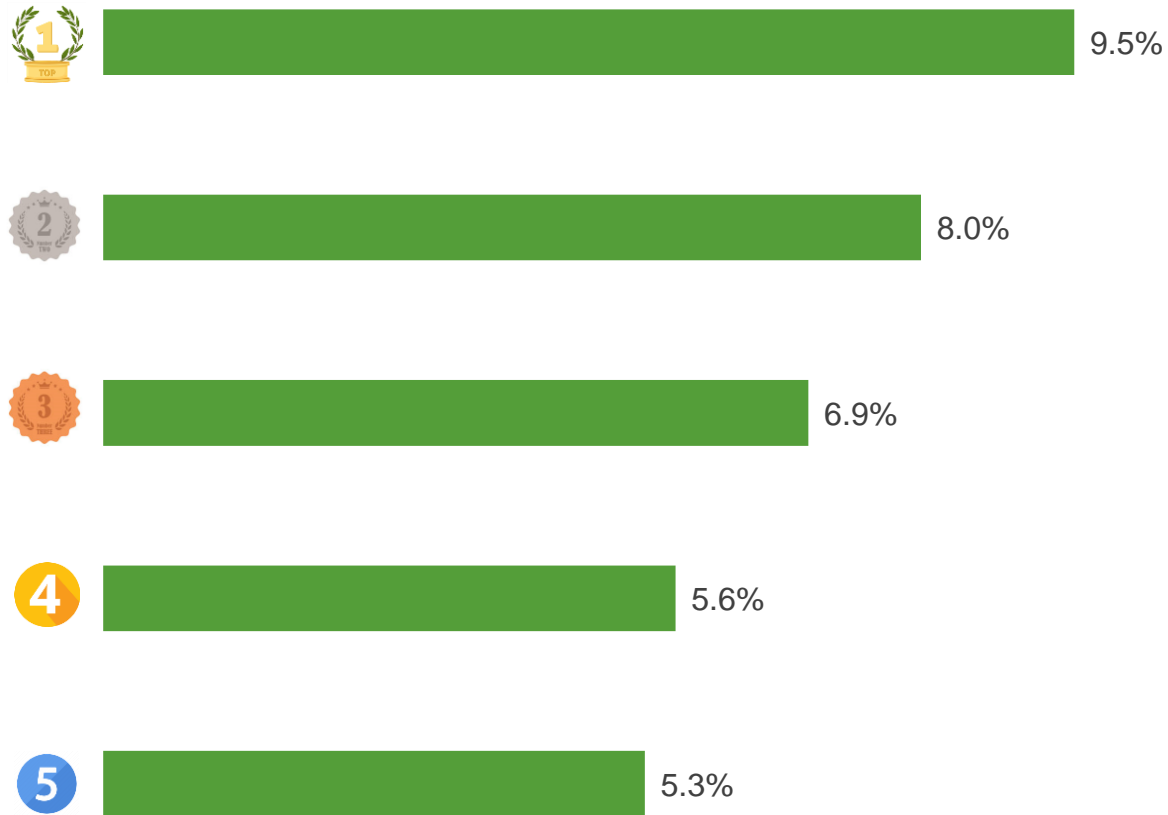
Increase **40,9%** compared to Jul-2024

Decrease **60,2%** compared to Aug-2023

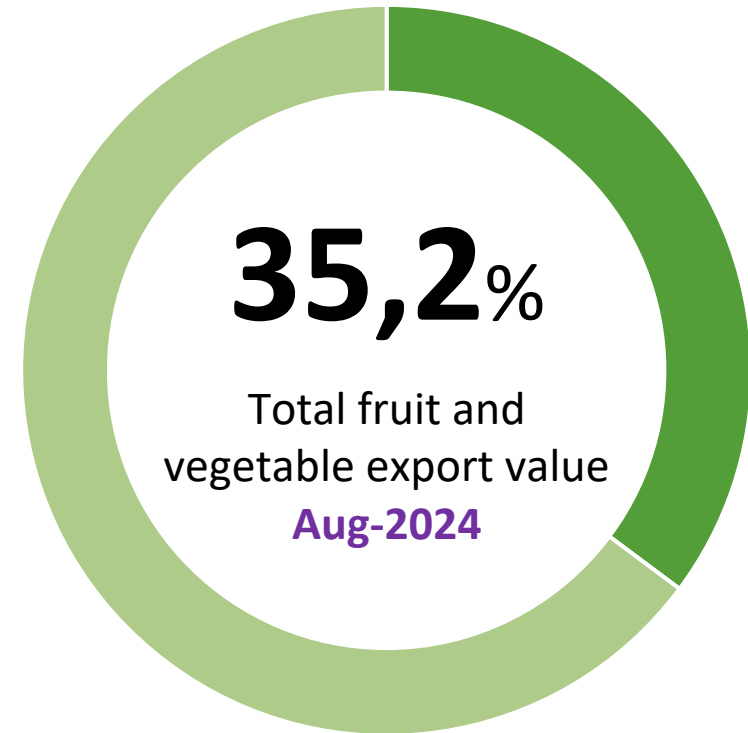


FRUITS & VEGETABLES (EXPORT)

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



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





FRUITS & VEGETABLES (IMPORT)

Import value from Japan, Aug-2024



Import results from Japan, Aug-2024

Value



0,3

Mil.USD

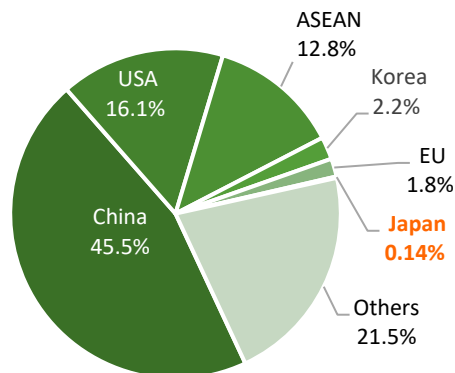
Decrease **1,5%** compared to Jul-2024

Decrease **33,6%** compared to Aug-2023

241,9 Thous.USD lower than monthly average in 2023

Accumulated 8 months 2024 reached **3,5 Mil.USD**, equal to **53,7%** of value in 2023

Percentage of import value from Japan, Aug-2024



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





01

Japan opens market for Brazilian Hass avocados

The Japanese government has approved the import of Hass avocados from Brazil. This decision provides Japanese consumers with more fruit options and strengthens Brazil's position in this premium market. Japan's fruit imports from Brazil reached a value of USD 3.29 million in the first seven months of 2024.

Source: Freshplaza.com

02

Japan still rejects fresh potatoes from the U.S

The U.S. has been exporting frozen potatoes to Japan for making French fries since 2006, but has yet to export fresh potatoes, despite first requesting market access nearly 30 years ago.

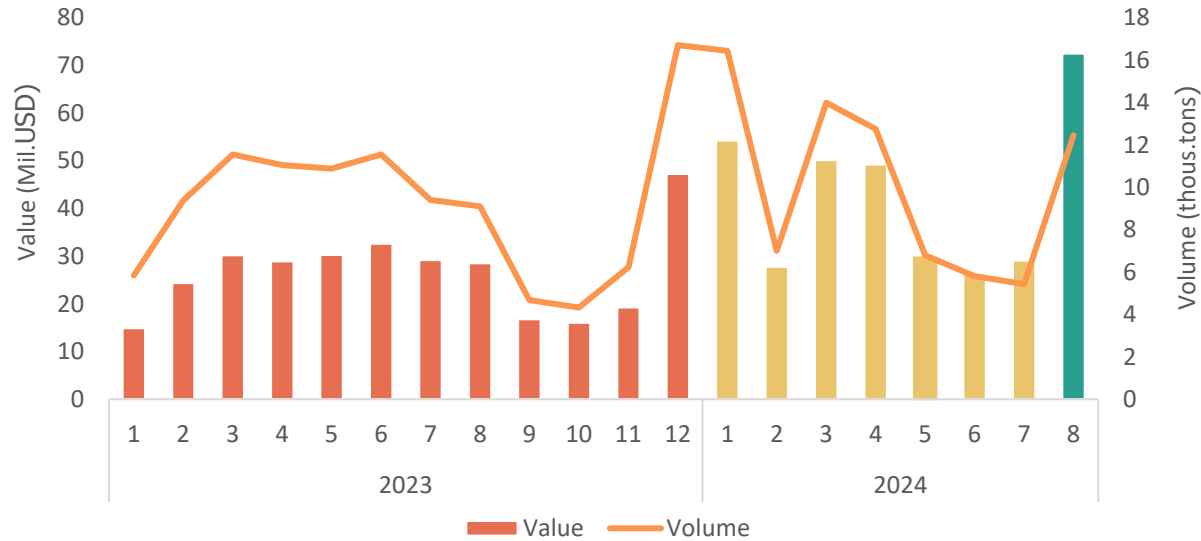
According to a representative of the Idaho Potato Commission (U.S.), Japan is delaying trade processes to protect its domestic potato industry.

Source: Idahocapitalsun.com



COFFEE

Export volume and value to Japan, Aug-2024



Export results to Japan, Aug-2024

Value

40,2 Mil.USD

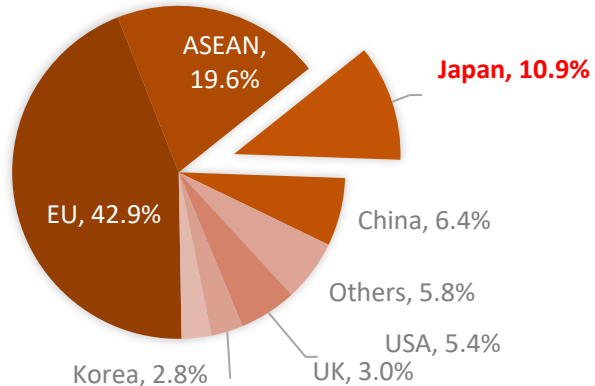
- ↗ Increase **38,4%** compared to Jul-2024
- ↗ Increase **41,1%** compared to Aug-2023
- ↗ **13,7 Mil.USD** higher than monthly average in 2023
- ❖ Accumulated 8 months 2024 reached **306,7 tr.USD**, equal to **96,4%** of value in 2023

Volume

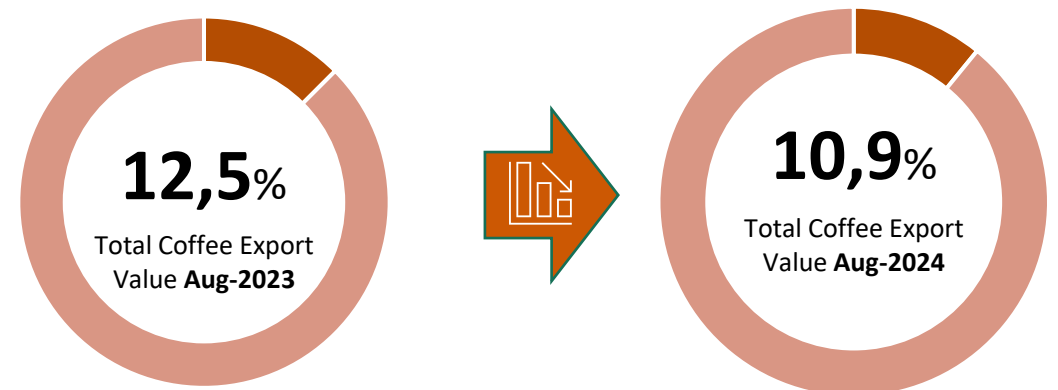
7,1 Thous.tons

- ↗ Increase **31,6%** compared to Jul-2024
- ↘ Decrease **21,5%** compared to Aug-2023
- ↘ **2,1 Thous.tons** Lower than monthly average in 2023
- ❖ Accumulated 8 months 2024 reached **75,4 Thous.tons**, equal to **68,1%** of volume in 2023

Percentage of export value to Japan, Aug-2024



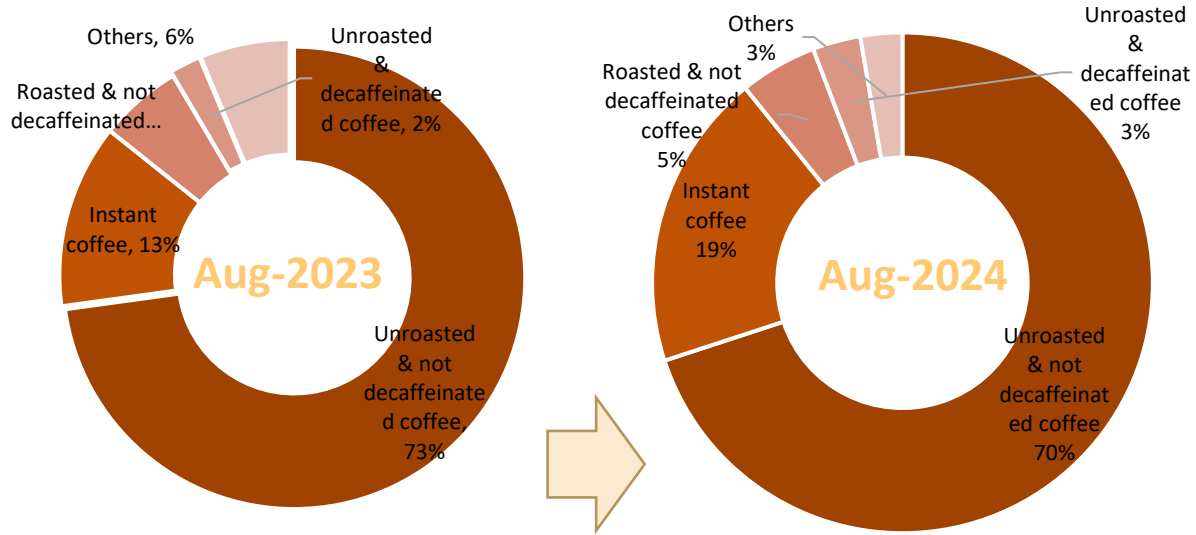
Changes in percentage of export results to Japan, Aug-2024



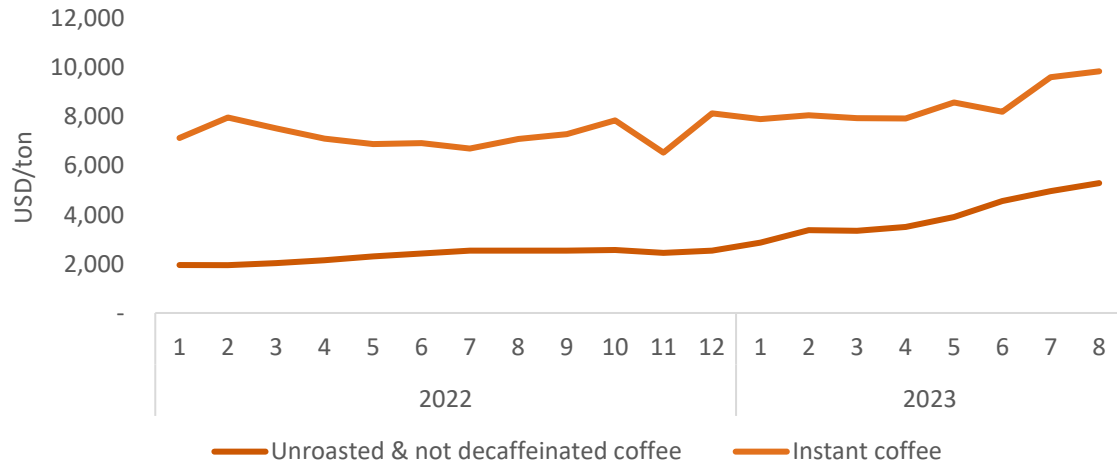


COFFEE

Structure of exports by products to Japan, Aug-2024



Average export price to Japan, Aug-2024



Export results to Japan, Aug-2024



Unroasted & not decaffeinated coffee

Value: **26,6** Mil.USD
 Increase **44%** compared to Jul-2024
 Increase **48,3%** compared to Aug-2023



Instant coffee

Value: **7,4** Mil.USD
 Increase **77%** so compared to Jul-2024
 Increase **130%** compared to Aug-2023



Others

Value: **1** Mil.USD
 Decrease **50,2%** compared to Jul-2024
 Decrease **32,6%** compared to Aug-2023

Instant coffee

The average export price in Jul-2024 is **9.843** USD/ton, Increase **13,3%** compared to the previous month; and Increase **47,4%** compared to the same month of 2023.

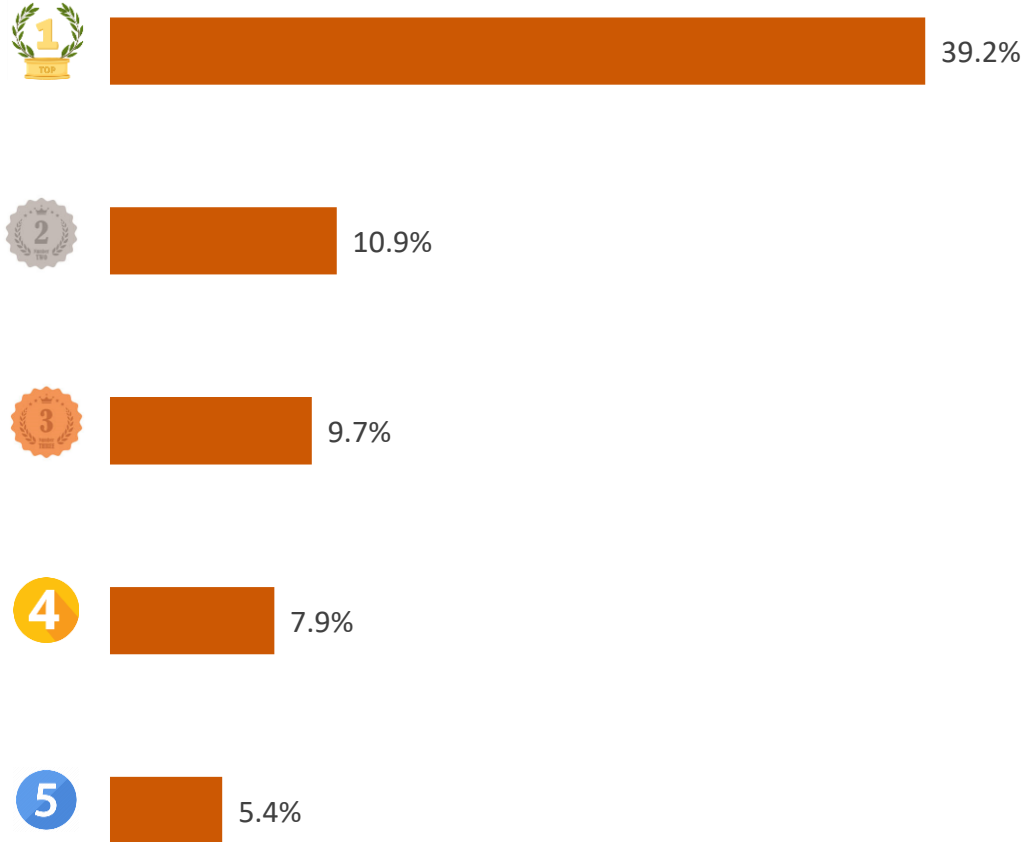
Unroasted & not decaffeinated coffee

The average export price in Jul-2024 is **5.290** USD/ton; Increase **6,8%** compared to the previous month; and Increase **108,2%** compared to the same month of 2023.

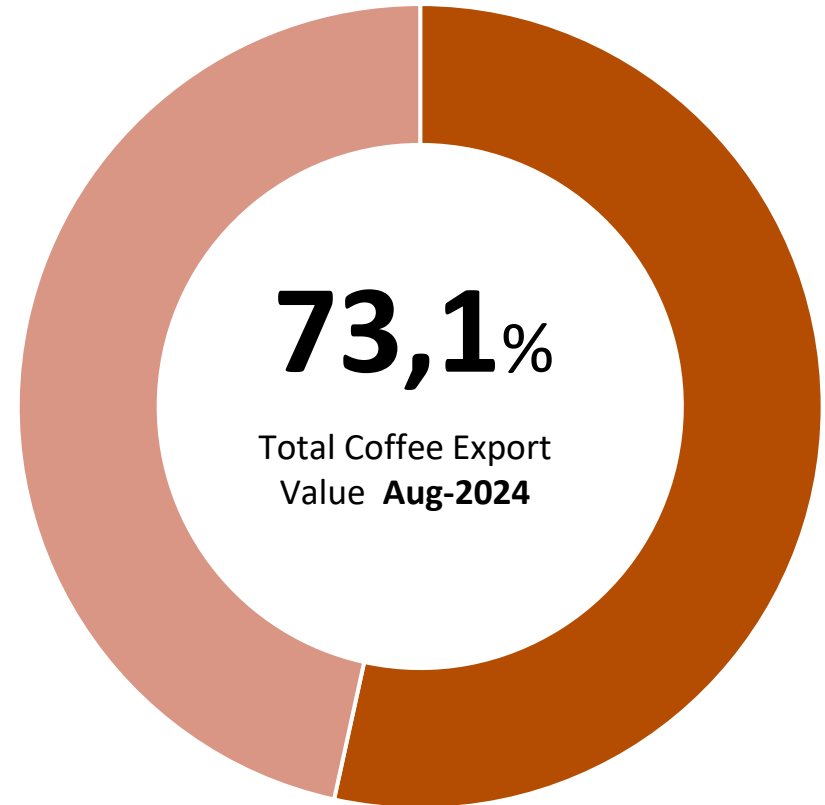


COFFEE

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



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





Japan's annual coffee consumption exceeds 450,000 tons

Annual coffee consumption in Japan has surpassed 450,000 tons, driving continuous market growth. The ready-to-drink (RTD) coffee market alone is valued at approximately USD 15 billion, thanks to innovations in flavor and packaging.

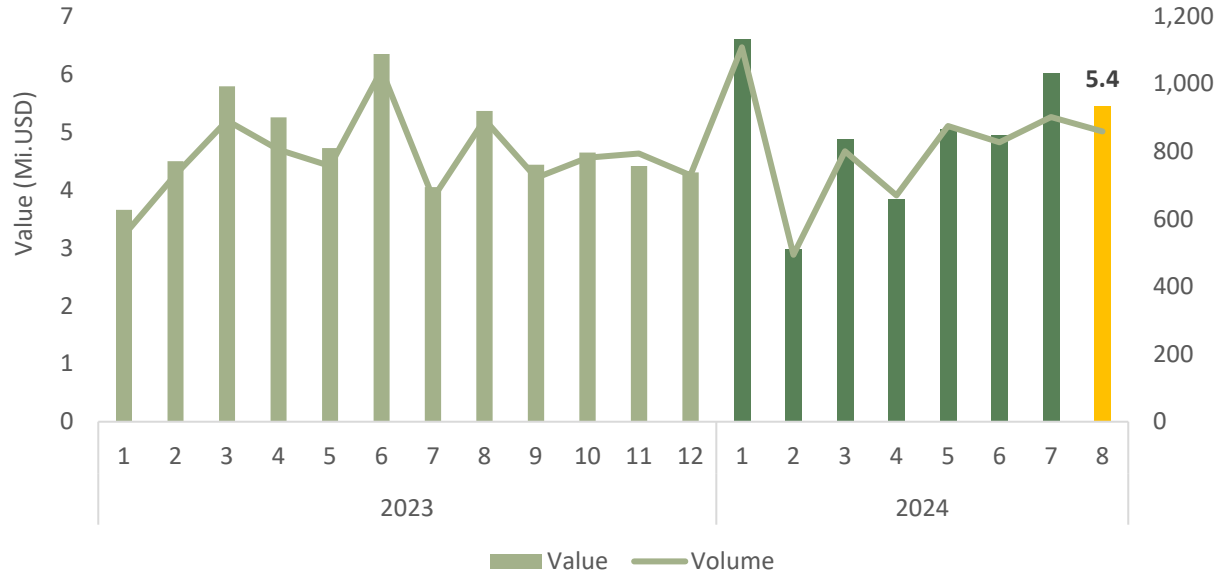
Japan is also focusing on functional RTD products, enriched with vitamins and collagen, catering to the health-conscious consumer trend. RTD coffee exports are growing rapidly, particularly within Asia. Sustainable strategies, such as recycled packaging and fair trade practices, have further strengthened Japan's position in the coffee industry.



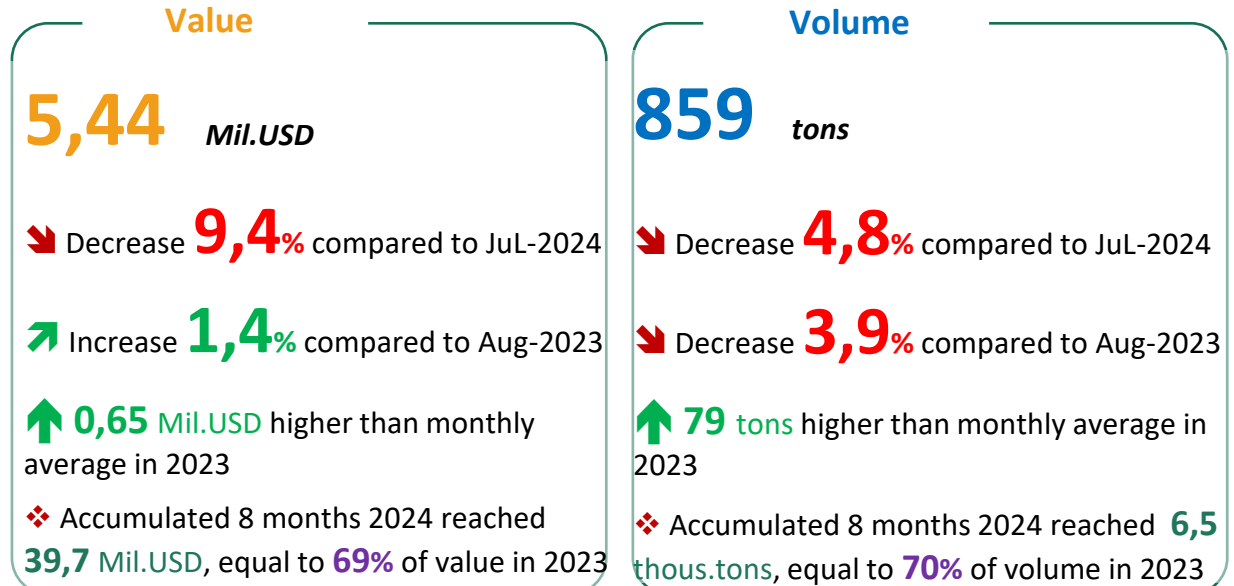


CASHEW NUTS

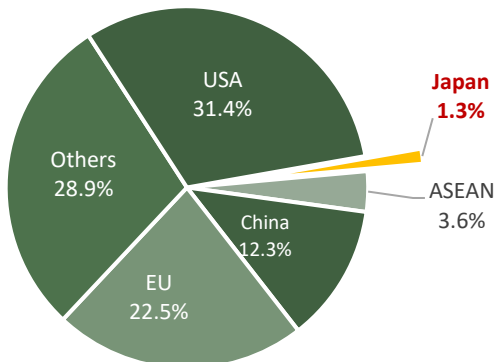
Export volume and value to Japan, Aug-2024



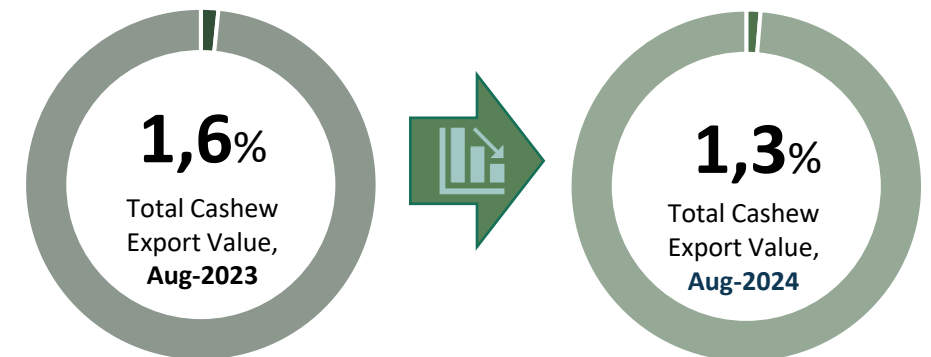
Export results to Japan, Aug-2024



Percentage of export value to Japan, Aug-2024



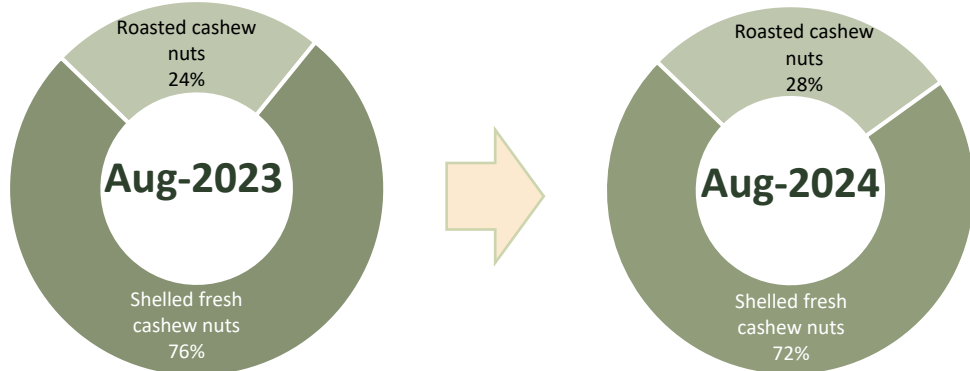
Changes in percentage of export results to Japan, Aug-2024



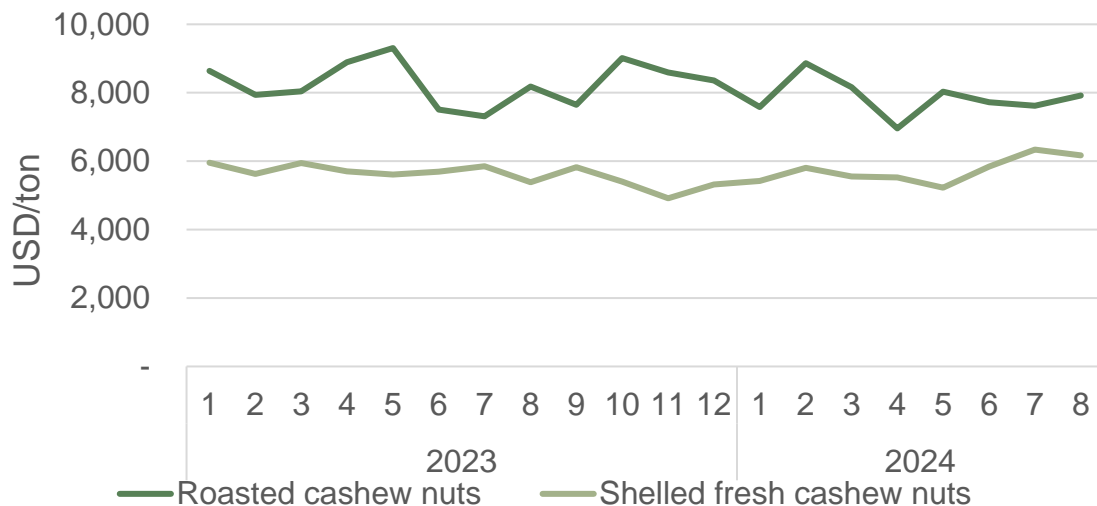


CASHEW NUTS

Structure of exports by products to Japan, Aug-2024



Average export price to Japan, Aug-2024



Export results to Japan, Aug-2024



Shelled fresh cashew nuts

Value: **3,86** Mil.USD

Decrease **14,6%** compared to Jul-2024

Decrease **4,9%** compared to Aug-2023



Roasted cashew nuts

Value: **1,49** Mil.USD

Decrease **0,3%** compared to Jul-2024

Increase **18,6%** compared to Aug-2023

Shelled fresh cashew nuts

The average export price in Jul-2024 is **6.174** USD/ton; **Decrease 2,6%** compared to the previous month; and **Increase 14,7%** compared to the same month of 2023.

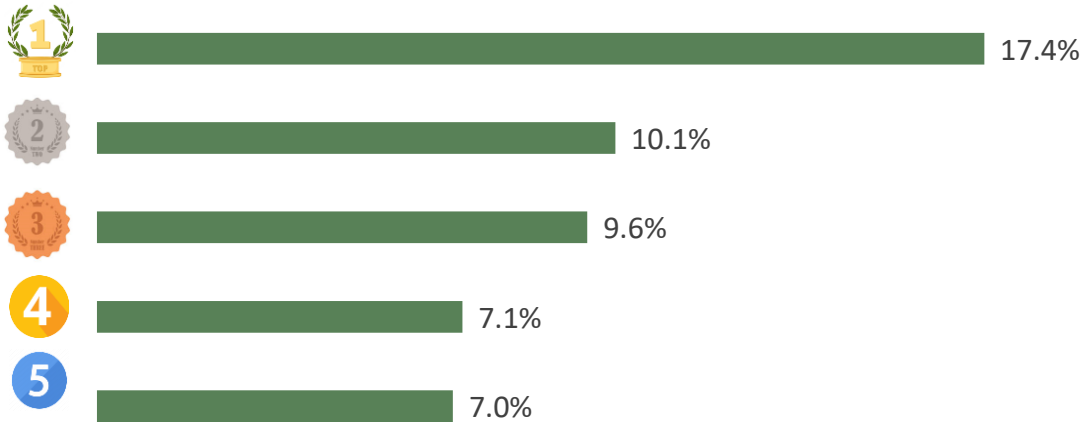
Roasted cashew nuts

The average export price in Jul-2024 is **7.919** USD/ton; **Increase 4,0%** compared to the previous month; and **Decrease 3,2%** compared to the same month of 2023.

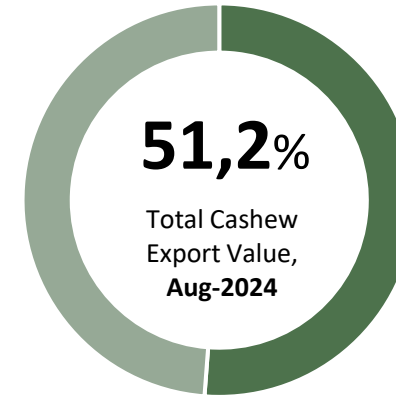


CASHEW NUTS

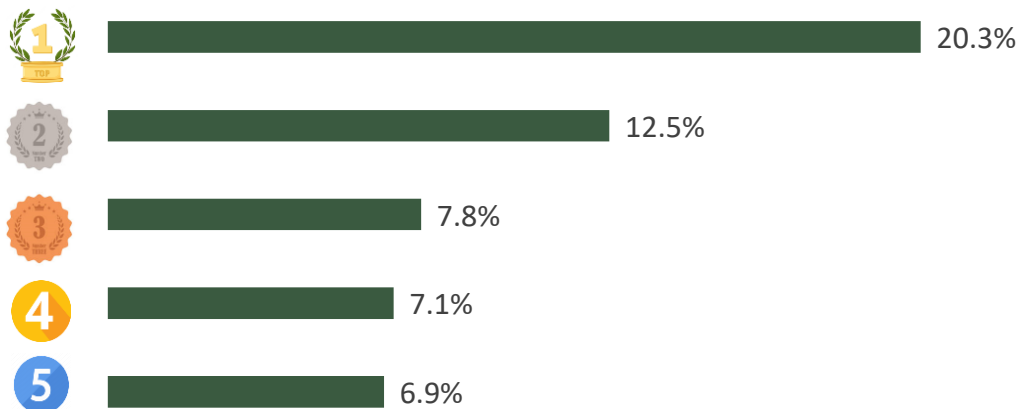
TOP 5 export enterprises by value to Japan, Aug-2024



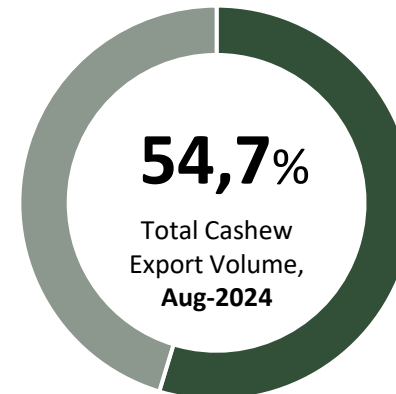
Value ratio of TOP 5 export enterprises to Japan, Aug-2024



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



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



CASHEW NUTS

SPOTLIGHTS



For the first time, Japan's MIRATH Agri-Tech will export cashews processed in Kampong Thom Province, Cambodia, to the European market, starting in October 2024, with a volume of around 250 tons.

MIRATH Agri-Tech stated that the cashew processing for the European market has been fully completed, with an export price of approximately USD 8 per kilogram. This export price allows Cambodia to remain competitive in the European cashew market against other countries. Europe is MIRATH's second-largest cashew market after Japan, followed by Singapore, Hong Kong, and Thailand. The company plans to further expand its exports to the European market next year.

In June, MIRATH Agri-Tech Co., Ltd established a medium-sized cashew processing plant headquartered in Kampong Svay District, Kampong Thom Province. The plant currently has a processing capacity of 20 tons of cashews per day.

Source: cambonomist.com





WOOD & WOODEN PRODUCTS

Export value to Japan, Aug-2024



Export results to Japan, Aug-2024

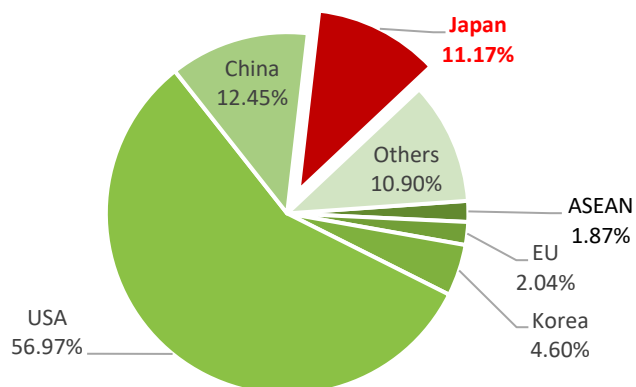


168

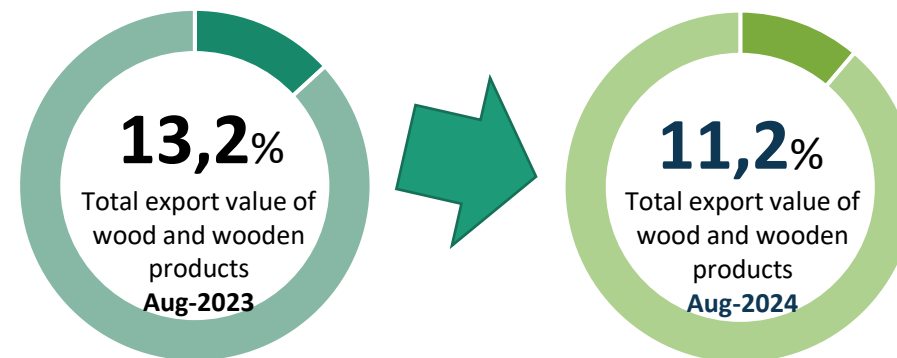
Mil.USD

- ➔ Increase **3,0%** compared to Jul-2024
- ➡ Decrease **1,3%** compared to Aug-2023
- ➔ **28,5 Mil.USD** higher than monthly average in 2023
- ❖ Accumulated 8 months 2024 reached **1,1 Bil.USD**, equal to **67,2%** of value in 2023

Percentage of export value to Japan, Aug-2024



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





WOOD & WOODEN PRODUCTS

Structure of exports by products to Japan, Aug-2024



Export results to Japan, Aug-2024



Wood chips

Value: **115,3** Mil.USD

Increase **5%** compared to Jul-2024

Increase **3%** compared to Aug-2023

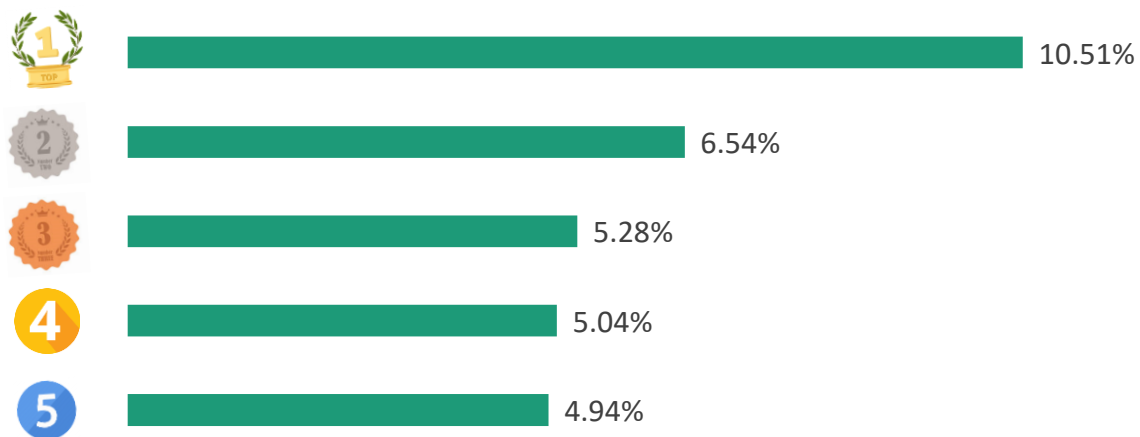
Plywood

Value: **7,2** Mil.USD

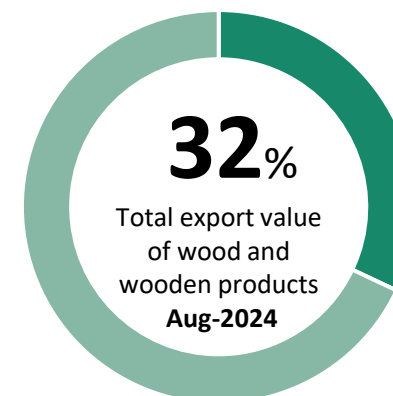
Decrease **1%** compared to Jul-2024

Increase **1%** compared to Aug-2023

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



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





WOOD & WOODEN PRODUCTS

SPOTLIGHTS



In June 2024, Japan's import value of office furniture (HS 940330) decreased by 5% compared to the previous month and by 15% compared to the same period last year. China was the largest supplier, accounting for 70% of the total import value, followed by Malaysia with 9% and Italy with 5%. For kitchen furniture (HS 940340), the import value decreased by 6% compared to the previous month and remained stable compared to the same period last year, with the Philippines accounting for 50% and Vietnam 32% of the total import value.

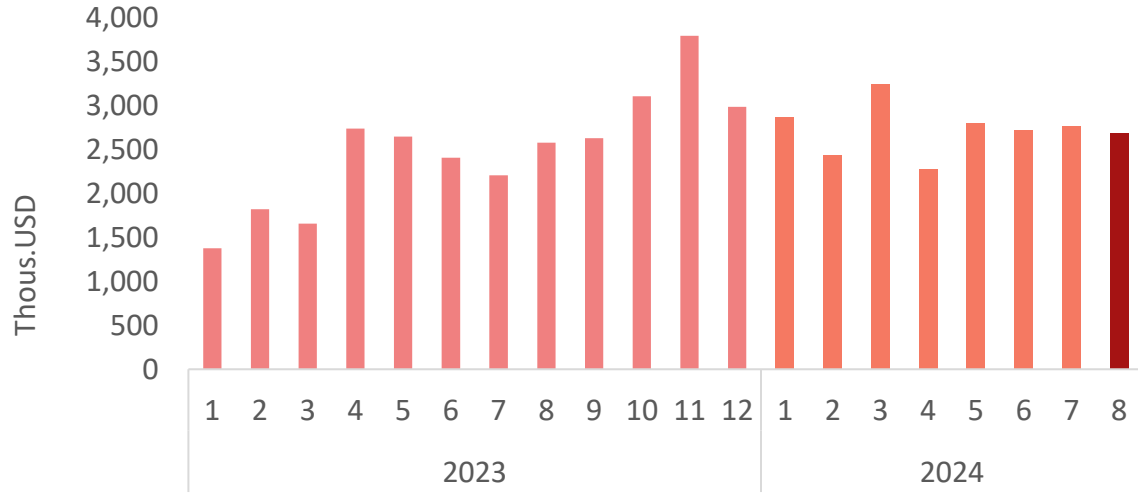
Source: ITTO





MEAT AND MEAT PRODUCTS (EXPORT)

Export value to Japan, Aug-2024



Export results to Japan, Aug-2024



2,73
Mil.USD

Value

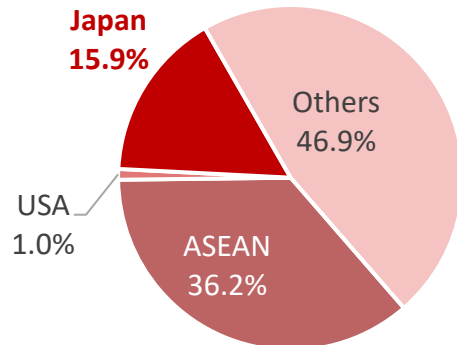
↘ Decrease **3%** compared to Jul-2024

↗ Increase **4,1%** compared to Aug-2023

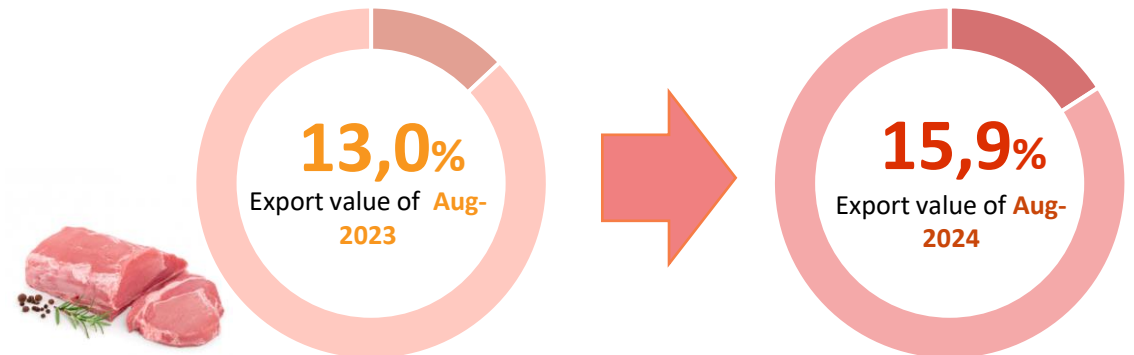
↗ r**189,1 Thous.USD** higher than monthly average in 2023

◇ Accumulated 8 months 2024 reached **21,8 Mil.USD**, equal to **72,7%** of value in 2023

Percentage of export value to Japan, Aug-2024



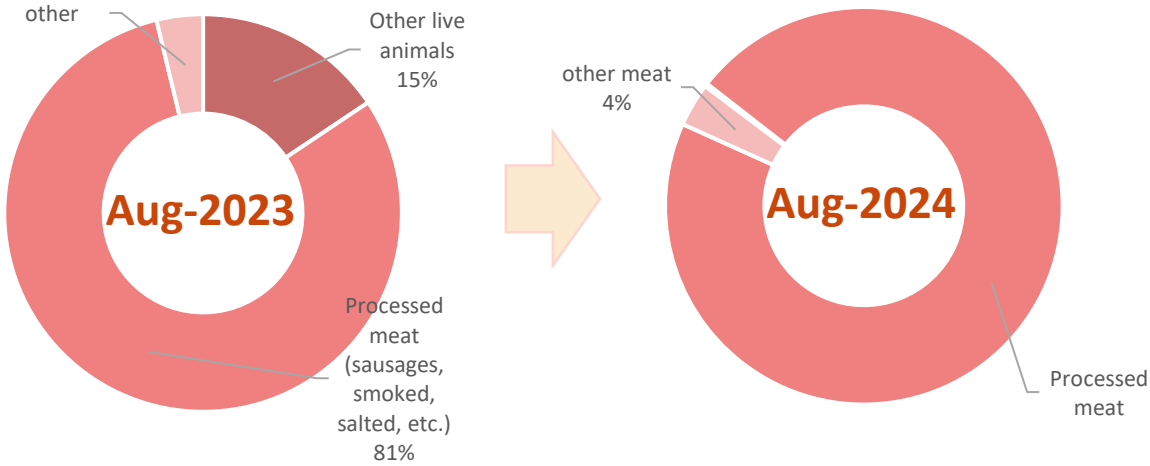
Changes in percentage of export results to Japan, Aug-2024





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, Aug-2024



Export results to Japan, Aug-2024



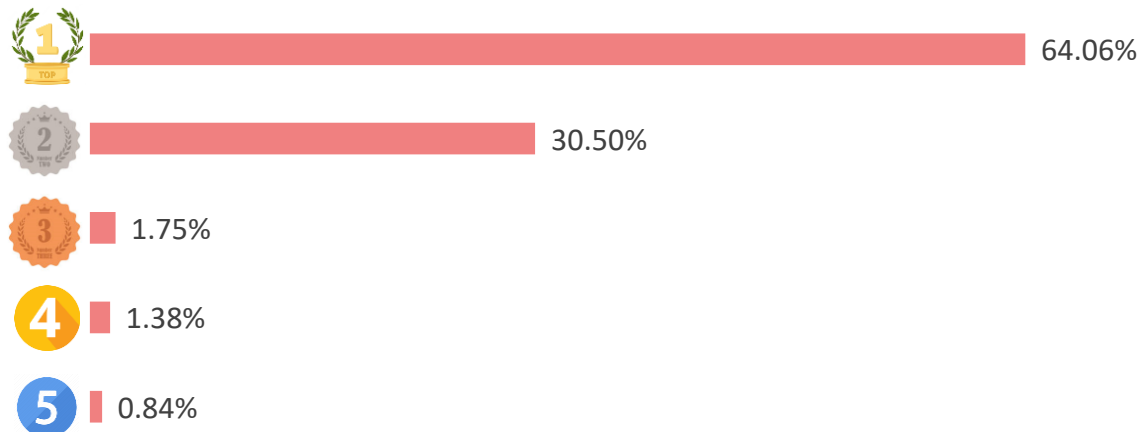
Processed meat (sausages, smoked, salted, etc.)

Value: **2,59** Mil.USD

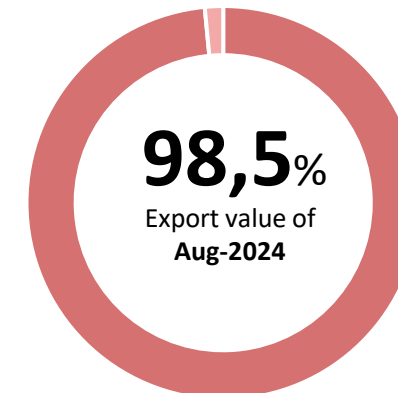
Decrease **3,8%** compared to Jul-2024

Increase **24,2%** compared to Aug-2023

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



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





Any comments, please send to:

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