



ISPAE

Volume 10/2025

MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

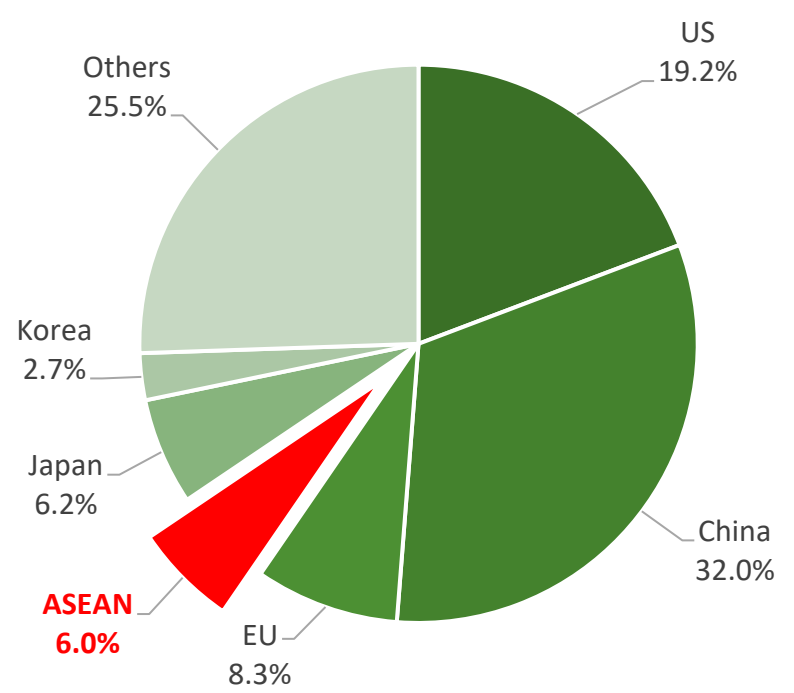
FROM VIETNAM TO **ASEAN**

Prepared by: **AGREiNFOS**



THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN SEPTEMBER 2025

Export proportion of AFF product to the ASEAN, Sep-2025



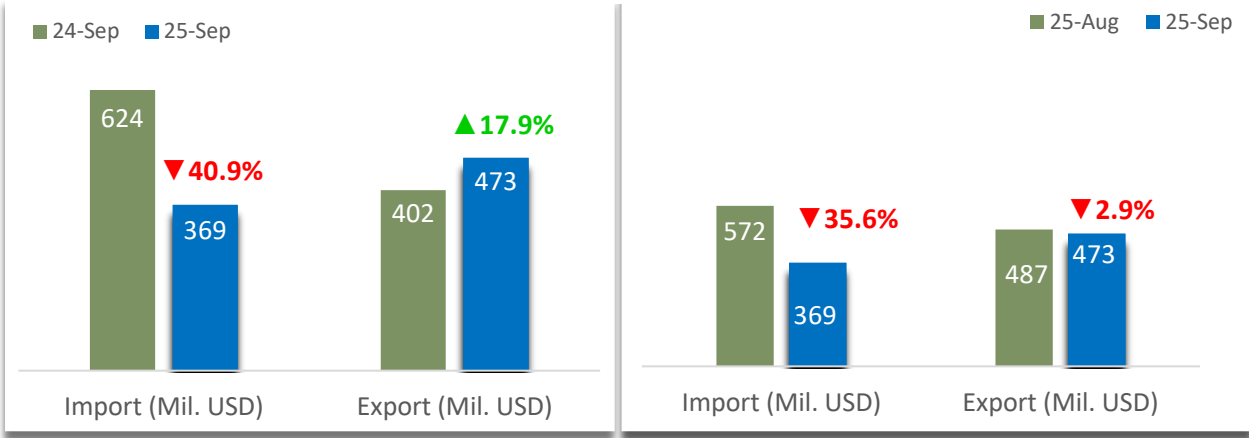
Changes in export proportion of AFF product to the ASEAN
Sep-2025 compared to Aug-25 and Sep-24

Volume (Mil.USD)	Compared to Jul 25	Compared to Aug 24	Volume (Mil.USD)
US	1,185	▼ 0.01%	▼ 1.9%
China	1,971	▲ 5.9%	▲ 5.1%
EU	513	▼ 0.02%	▲ 1.9%
ASEAN	369	▼ 3.2%	▼ 5.7%
Japan	382	▼ 1.0%	▲ 0.4%
Korea	167	▼ 0.4%	▼ 0.2%
Total Export	6.159		

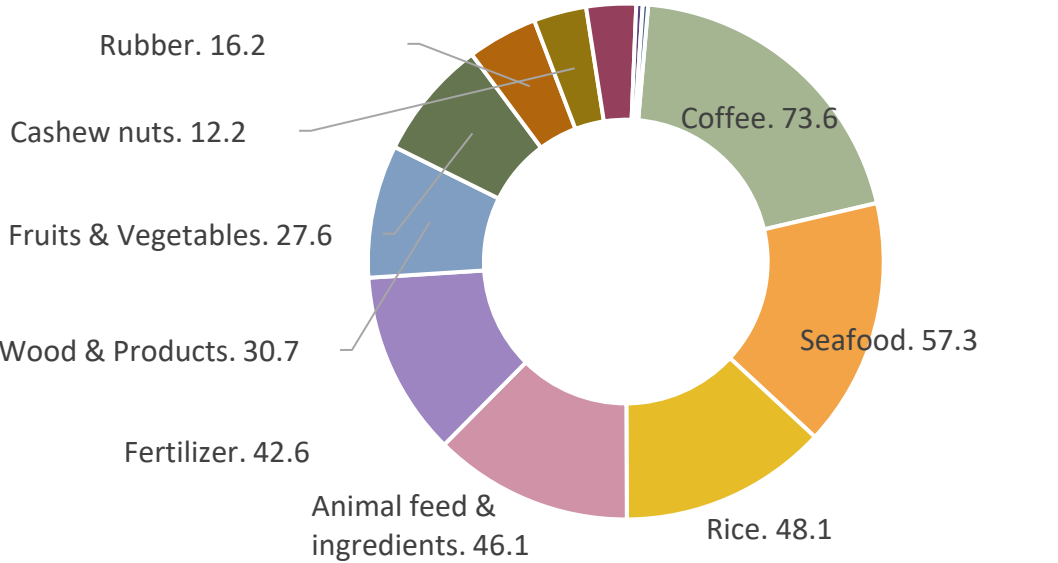
Source: Calculated from data of the Department of Customs

THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO ASEAN IN **AUGUST 2025**

AFF product import-export turnover between
Vietnam and ASEAN, Sep 2025



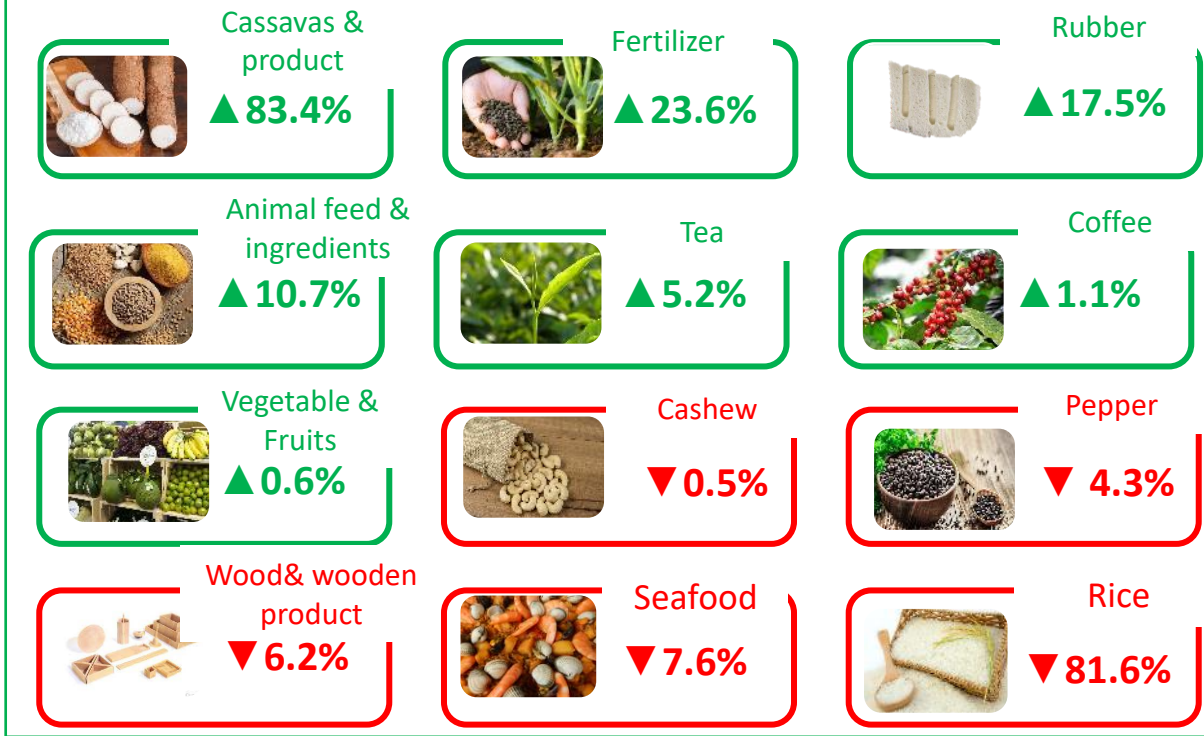
Key AFF product export Value to ASEAN , Aug 2025



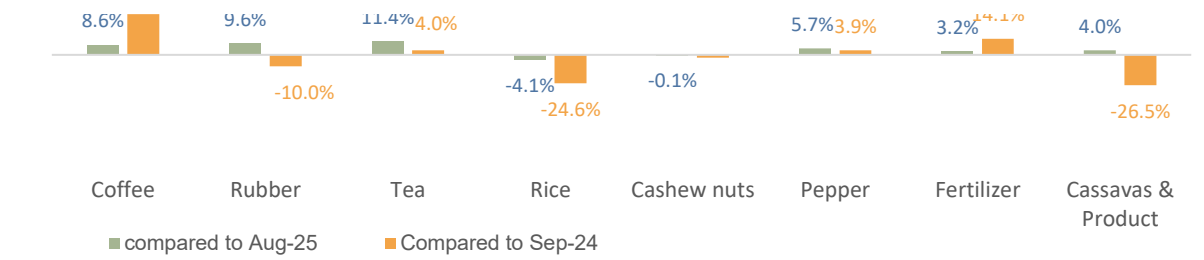
Source: Calculated from data of the Department of Customs

Unit: Mil. USD

Changes in key AFF product export Value to
ASEAN in Aug 2025 compared to Sep 2025



Changes in average export Value of key AFF products
to ASEAN in Sep 2025-25 compared to Sep-24 and compared to Aug
2025



ASEAN accelerates the Digital Economy Framework Agreement (DEFA).



ASEAN accelerates the Digital Economy Framework Agreement (DEFA).

At the special AECC meeting session on October 24, 2025, Malaysia called on ASEAN countries to enhance cooperation to finalize the Digital Economy Framework Agreement (DEFA) by 2026. The meeting focuses on discussing issues related to digital taxation, data governance, server locations, and online transactions.



Negotiations have made significant progress, demonstrating the strong commitment of member countries. Malaysia emphasized that DEFA should ensure inclusivity, enabling small businesses, startups, and individuals to benefit from a secure and reliable digital ecosystem.

DEFA is expected to affirm ASEAN's leadership role in the global digital economy, with the goal of signing the agreement in 2026 and driving digital transformation across the region.

Source: aseanvietnam.vn



Malaysia and the United States reached an agreement on the Reciprocal Trade Agreement.

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On October 26, 2025, Malaysia and the United States signed the Reciprocal Trade Agreement to expand economic cooperation. The United States committed to maintain a 19% tariff and 0% tariff exemption for 1,711 Malaysian products (including palm oil, rubber, pharmaceuticals, etc.), which account for 12% of exports to the U.S. Malaysia offers preferential treatment for U.S. industrial goods and agricultural products while removing non-tariff barriers in key sectors. The agreement includes commitments on environmental standards, labor rights, intellectual property, and a private sector investment and trade package worth over \$200 billion.

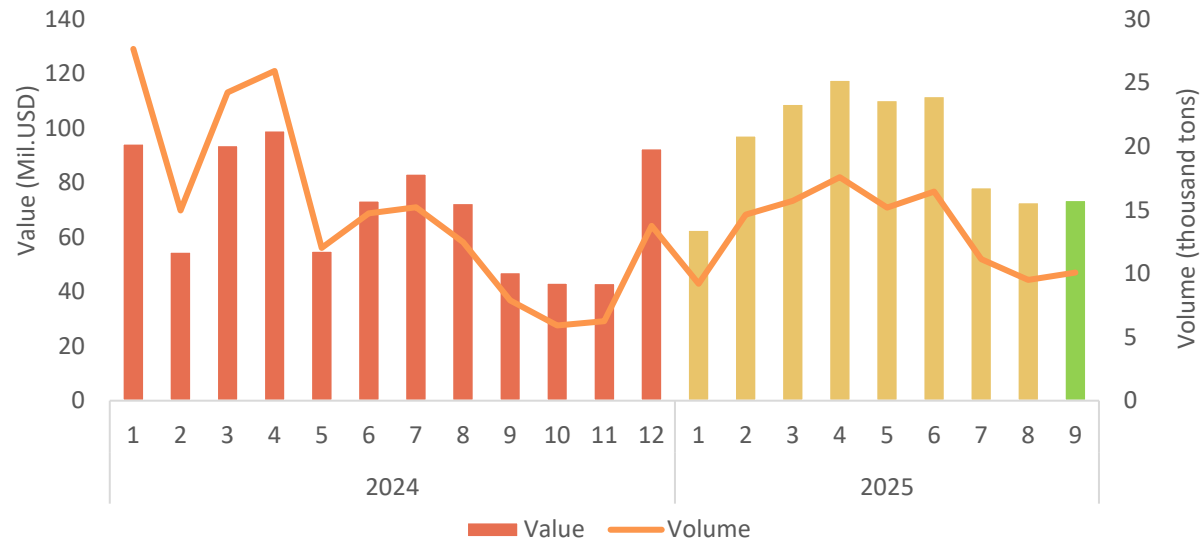
The agreement is expected to enhance industrial capacity, attract high-tech investments, and affirm Malaysia's role as a neutral and central hub within the ASEAN region.

Source: aseanvietnam.vn

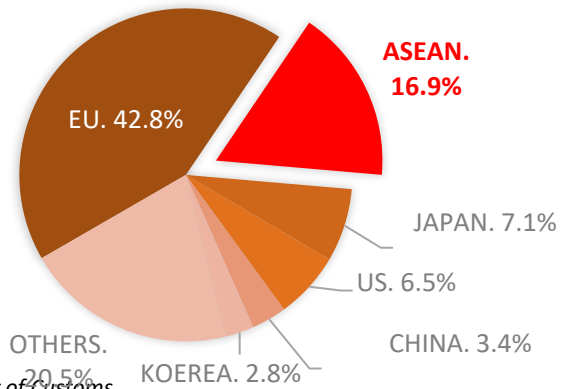


COFFEE

Export volume and value to ASEAN, Sep-2025

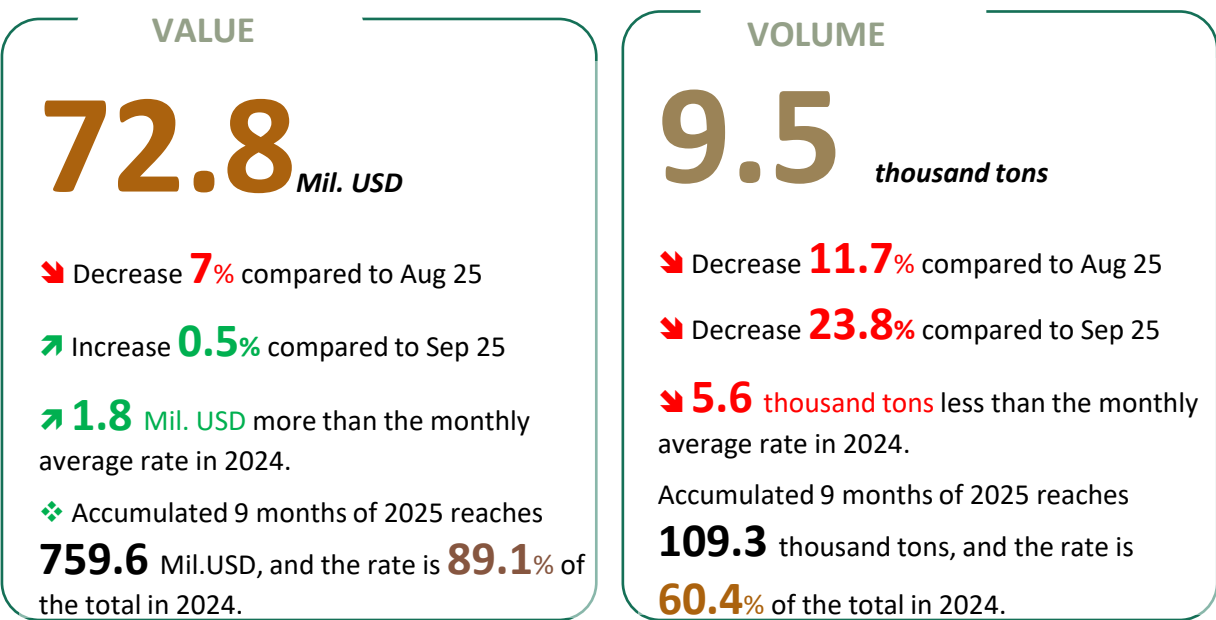


Percentage of export value to ASEAN Sep-2025

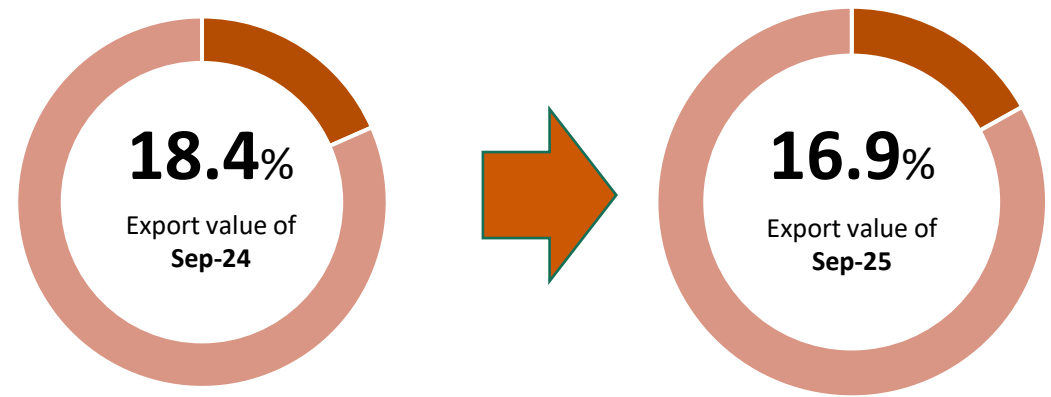


Source: Calculated from data of the Department of Customs

Export results to ASEAN Sep-2025



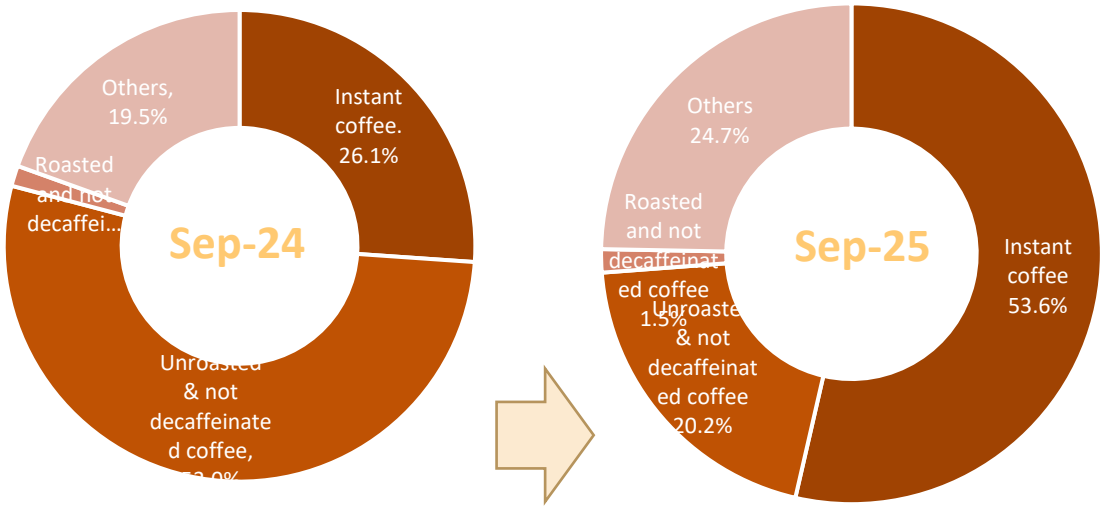
Changes in percentage of export value to ASEAN Sep-2025



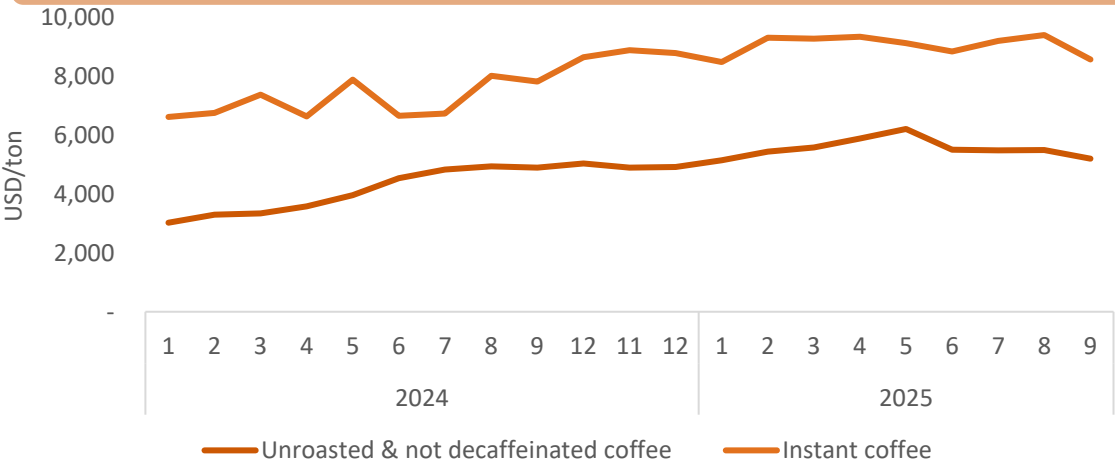


COFFEE

Structure of exports by products to ASEAN, Sep-2025



Average export price to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025



Unroasted & not decaffeinated coffee

Value: **14.9** Mil. USD
Increase **42.1%** compared to Aug 25
Decrease **40.5%** compared to Sep 25



Instant coffee

Value: **35.9** Mil. USD
Increase **9.4%** so compared to Aug 25
Increase **221%** compared to Sep 25



Others

Value: **18.1** Mil. USD
Decrease **27.2%** compared to Aug 25
Increase **96.1%** compared to Sep 25

Instant coffee

The average export price in Aug-25 is **8.566** USD/ton. **Decrease 8.8%** compared to the previous month; and **Increase 9.7%** compared to the same month in 2024.

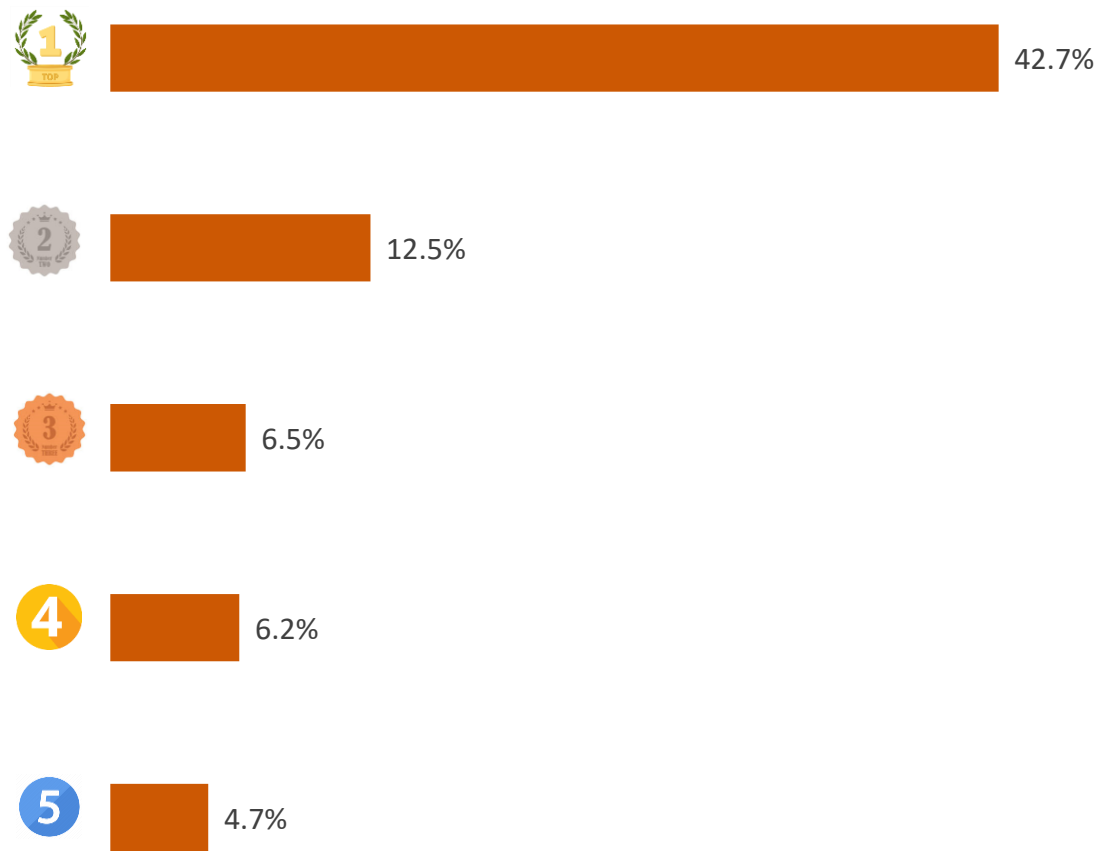
Unroasted & not decaffeinated coffee

The average export price in Aug-25 is **5.492** USD/ton; **Decrease 5.3%** compared to the previous month; and **Increase 6.2%** compared to the same month in 2024.

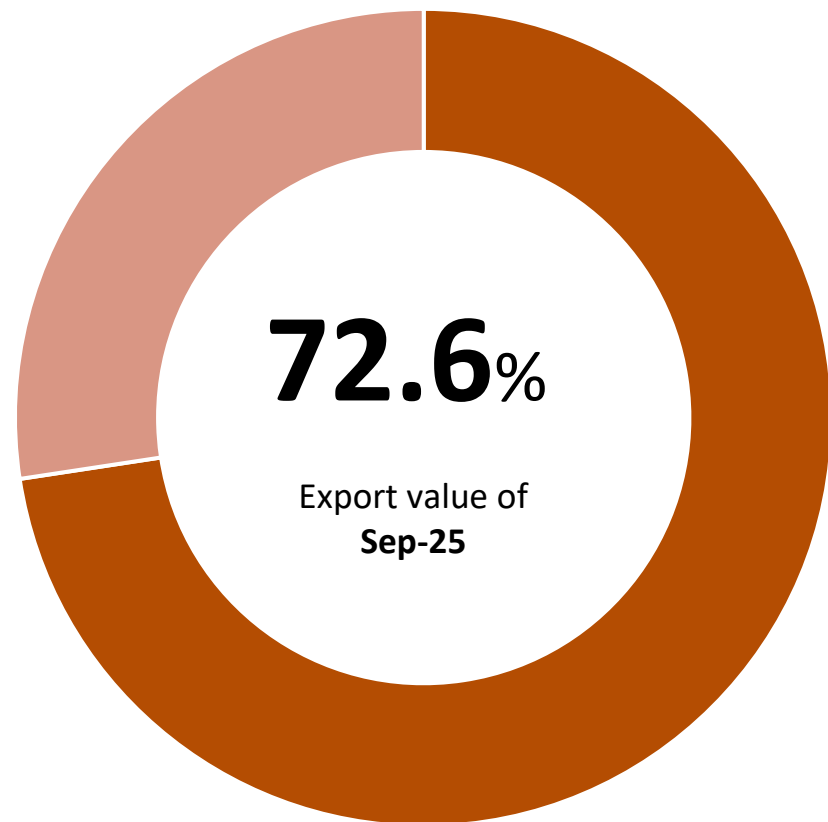


COFFEE

TOP 5 export enterprises by value to ASEAN, Aug-2025



Value ratio of TOP 5 export enterprises to ASEAN, Aug-2025



Source: Calculated from data of the Department of Customs



The Thai coffee chain Café Amazon is enhancing its international expansion strategy, targeting markets in Laos, the Philippines, Japan, Oman, and Bahrain through a franchise model. As of now, the chain operates over 5,000 stores worldwide, serving more than 107 million cups of coffee in just Q2 2025. Café Amazon sources its coffee beans locally from the Phah Lang, Pang Khon, Mae Wang, and Doi Inthanon regions in northern Thailand.

Domestically, the parent company, PTT Oil and Retail Business (OR), is expanding the OASYS complex in Ayutthaya, which includes a bakery, roasting facility, distribution center, and barista training academy. This facility operates with an environmentally friendly model, utilizing solar energy and a wastewater-free process, while also creating local employment opportunities. The "Café Amazon for Chance" program has been launched at over 430 stores in Thailand, providing job opportunities for the hearing-impaired, the elderly, and other disadvantaged groups.





According to trade data from the Indonesian government, Sumatra – the country's largest coffee-producing region – exported 594,432 bags of Robusta coffee in August 2025, a 44.98% increase compared to the same period last year (184,427 bags).

For the first five months of the 2025–2026 coffee season (from April 2025 to August 2025), Indonesia's total Robusta coffee exports reached 2,832,521 bags, marking a 162.83% increase compared to the same period of the previous season (1,754,816 bags).

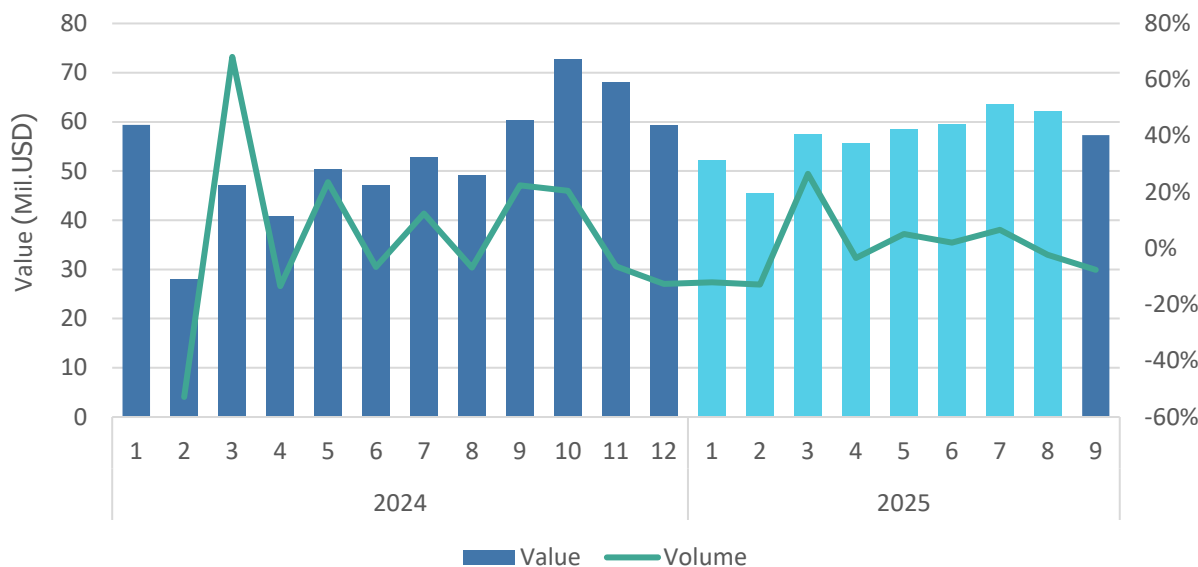
In terms of production, the 2025–2026 coffee season will be around 12 million bags, with approximately 85% of this being Robusta coffee.



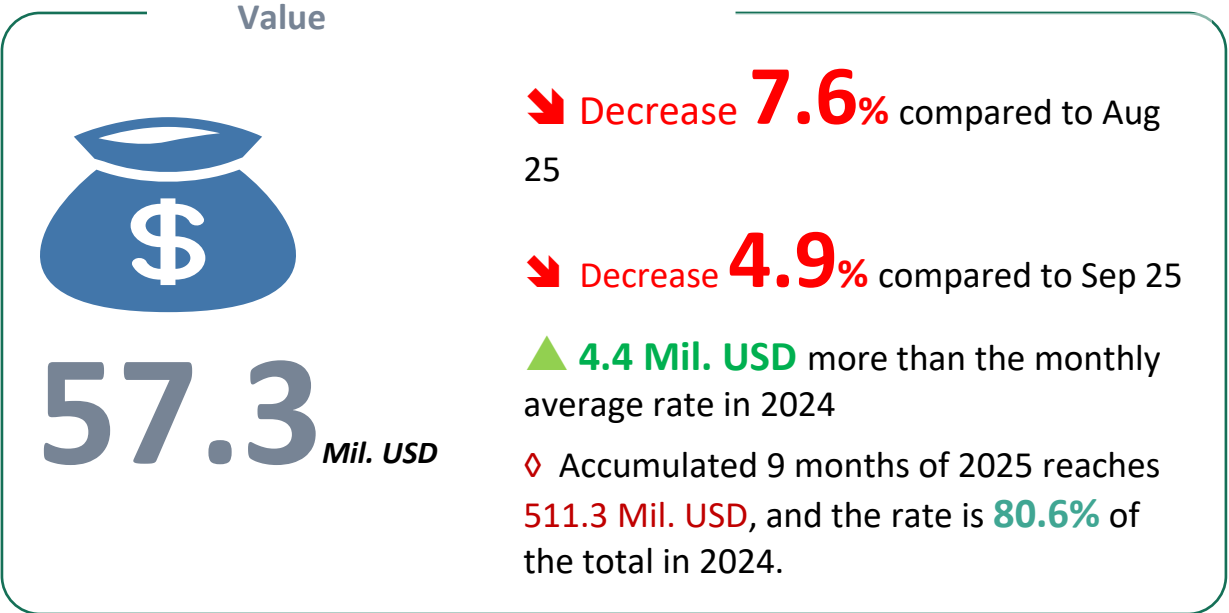


FISHERIES

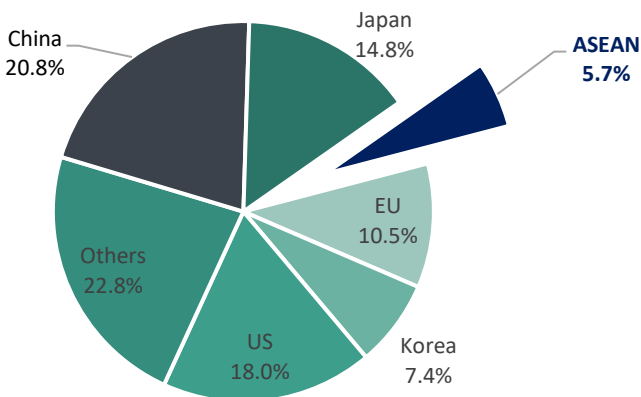
Export value to ASEAN, Sep-2025



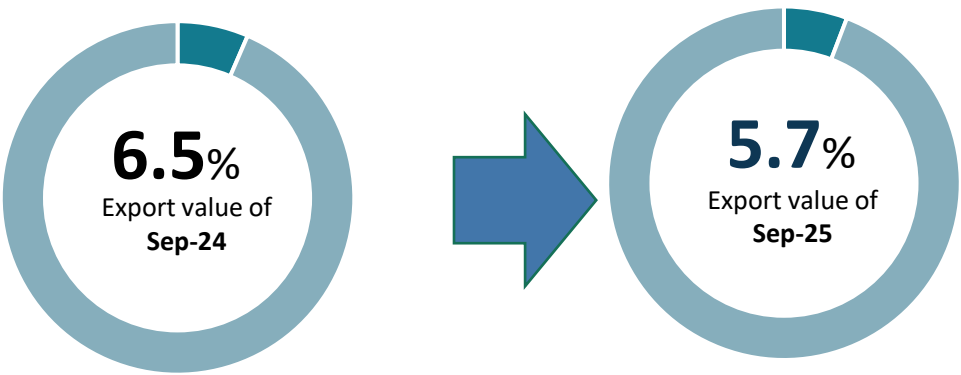
Export results to ASEAN, Sep-2025



Percentage of export value to ASEAN, Sep-2025



Change in percentage of export to ASEAN, Sep-2025

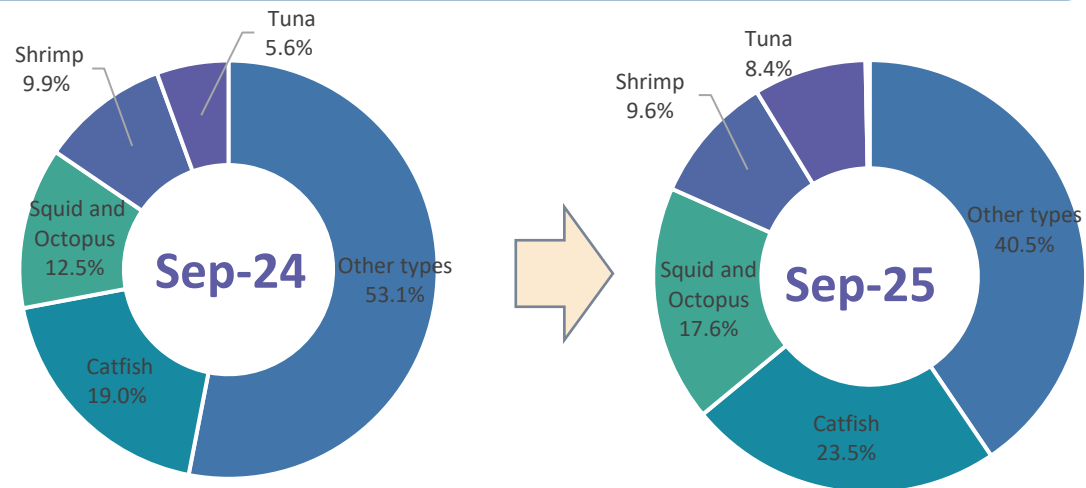


Source: Calculated from data of the Department of Customs

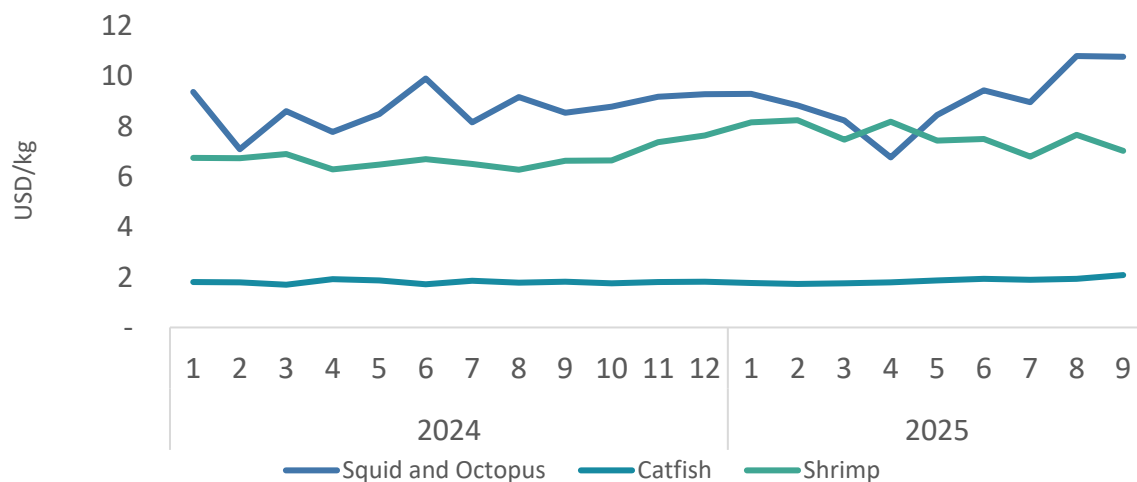


FISHERIES

Structure of exports by products to ASEAN, Sep-2025



Average export price to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025



Catfish

Value: **13.5** Mil. USD

Decrease 4.2% compared to Aug 25

Increase 17.7% compared to Sep 25



Squid & Octopus

Value: **10.1** Mil. USD

Increase 10.4% compared to Aug 25

Increase 34.5% compared to Sep 25



Shrimp

Value: **5.5** Mil. USD

Decrease 7.1% compared to Aug 25

Decrease 7.8% compared to Sep 25

Squid & Octopus

The average export price in Aug-25 is c **10.8** USD/kg; **Decrease 0.2%** compared to the previous month; and **Increase 26.1%** compared to the same month in 2024.

Catfish

The average export price in Aug-25 is c **2.1** USD/kg; **Increase 7.8%** compared to the previous month; and **Increase 14.4%** compared to the same month in 2024.

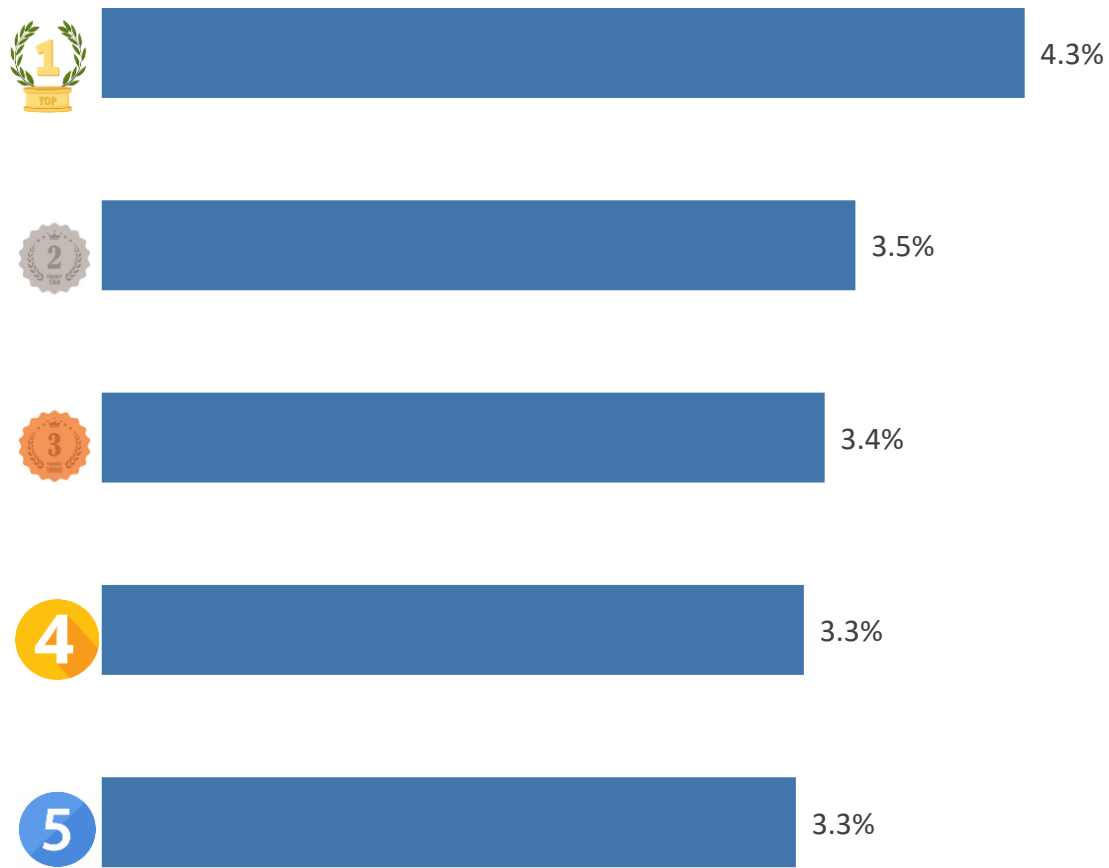
Catfish

The average export price in Aug-25 is c **7.0** USD/kg; **Decrease 8.3%** compared to the previous month; and **Increase 5.8%** compared to the same month in 2024.

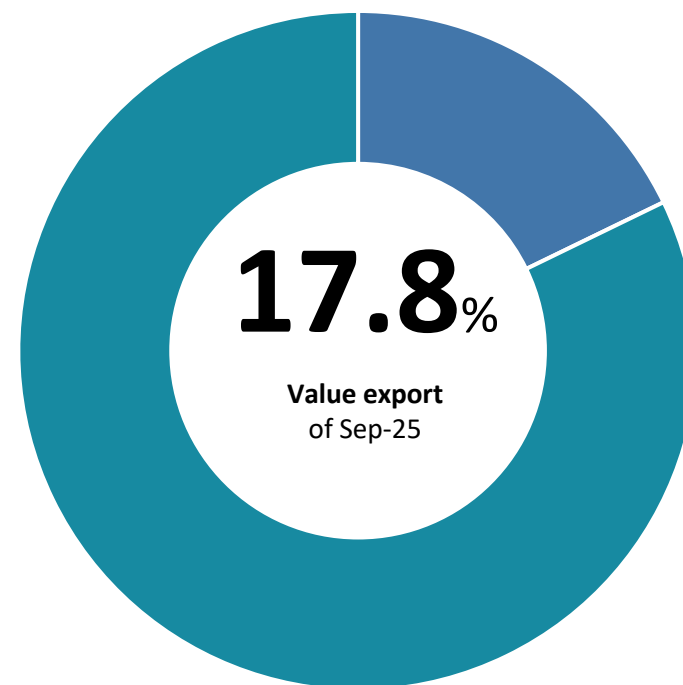


FISHERIES

TOP 5 export enterprises by value to ASEAN, Sep-2025



Value ratio of TOP 5 export enterprises to ASEAN, Sep-2025



01

Indonesia establishes a laboratory to monitor radiation in seafood products.

Indonesia's Minister of Marine Affairs and Fisheries announced plans to establish a laboratory next year to ensure that seafood products for export are free from radioactive contamination. He also requested that processing facilities use testing equipment that meets standards recognized by the United States to increase reliability for the U.S. market. Under an agreement with the U.S., Indonesia's Ministry of Marine Affairs and Fisheries will be the certifying body for shrimp and seafood products "free from Cesium-137" according to the FDA's import alert regulations. Testing will be conducted at designated laboratories, with the cost borne by the exporting companies.

This move follows the discovery by the United States of a frozen shrimp container from Indonesia contaminated with Cesium-137. The Indonesian government has set up a task force to address the risk, decontaminate, and ensure public safety.



Source: Antara



02

Vietnam continues to be the third-largest seafood supplier to Singapore.

In the first nine months of 2025, Vietnam maintained its position as the third-largest seafood supplier to Singapore, following Malaysia and Indonesia, according to data from the Singapore Business Regulatory Authority.

The value of seafood imports (HS03) from Vietnam reached \$68.2 million, a 14.5% increase compared to the same period in 2024, accounting for 10.2% of the total market share in Singapore. Among these, frozen/chilled fish fillets and fish meat (HS0304) amounted to \$34.9 million, an 8.1% increase, representing 30.3% of the market share.

Other products included crustaceans (HS0306) and mollusks (HS0307), with values of \$15.4 million and \$7.8 million, reflecting growth rates of 22.7% and 99.3%, respectively. The Vietnamese Trade Office in Singapore forecasts that exports of fish fillet products will remain stable in the near future. However, other product categories will continue to face competition from Malaysia, Indonesia, as well as from China, Japan, and India.



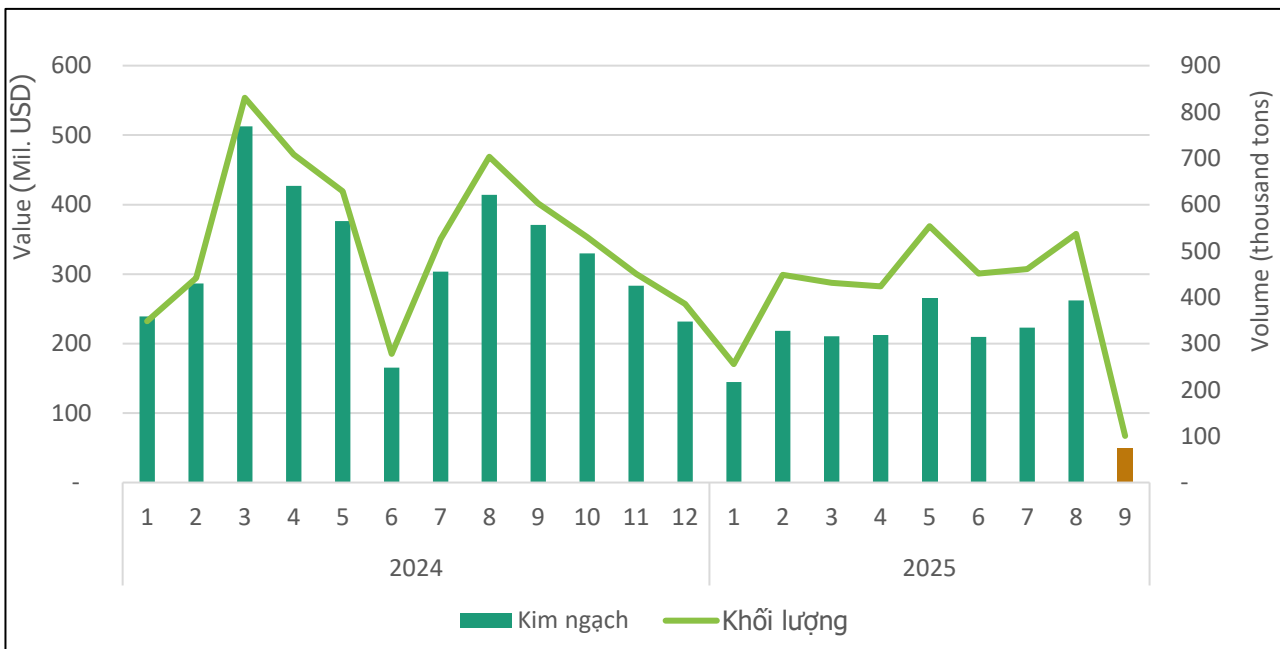
Source: thesaigontimes.vn



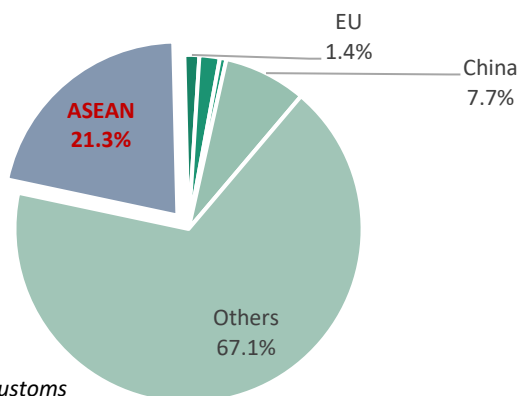


RICE

Export volume and Value to ASEAN, Sep-2025



Percentage of export Value to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025

VALUE

49.5 Mil. USD

↘ Decrease **81.1%** compared to Aug 25

↘ Decrease **86.7%** compared to Sep 24

↘ **278.8 Mil. USD** less than the monthly average rate in 2024

◇ Accumulated 9 months of 2025 reaches **1.7** Bil.USD, and the rate is **44.3%** of the total in 2024.

VOLUME

100.6 thousand tons

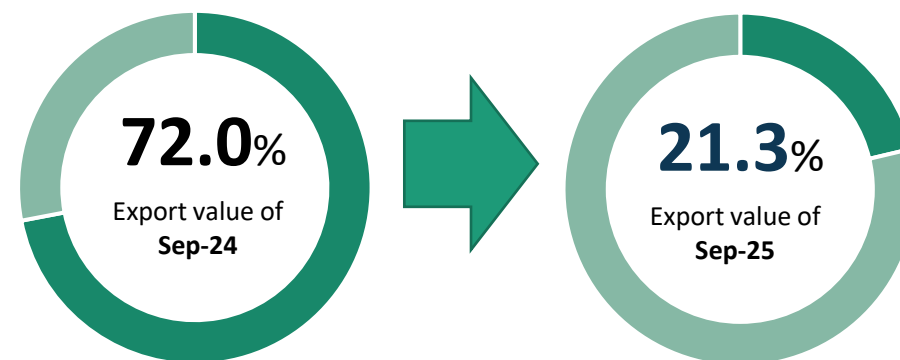
↘ Decrease **81.3%** compared to Aug 25

↘ Decrease **83.3%** compared to Sep 24

↘ **435.4 thousand tons** less than the monthly average rate in 2024

◇ Accumulated 9 months of 2025 reaches **3.6** Mil. Ton., and the rate is **55.4%** of the total in 2024.

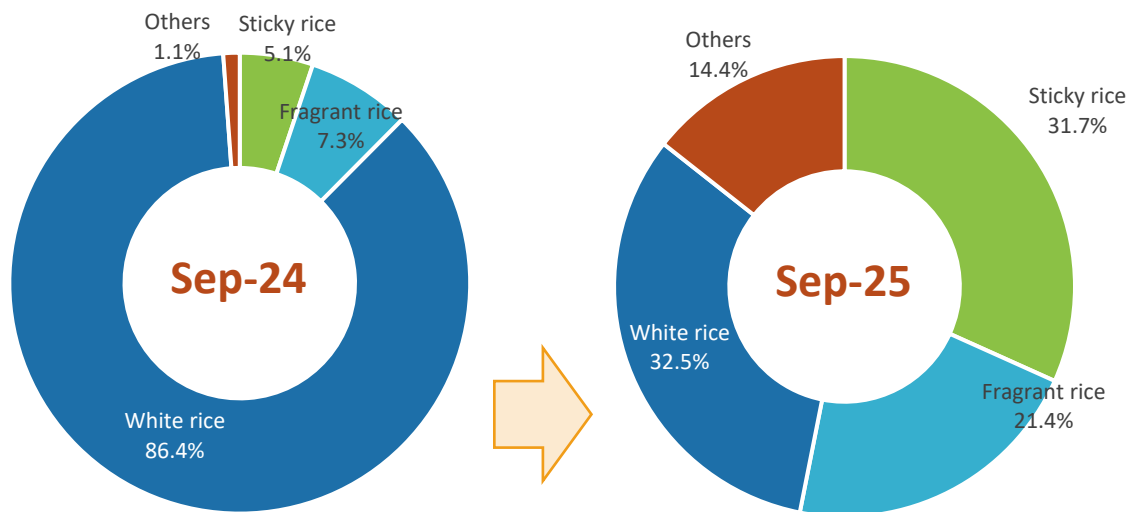
Changes in the percentage of export Value to ASEAN, Sep-2025





RICE

Structure of exports by products to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025



White rice

Value: **16.1** Mil. USD

Decrease **92%** compared to Aug 25

Decrease **95%** compared to Sep 24



Fragrant Rice

Value: **10.5** Mil. USD

Decrease **71%** compared to Aug 25

Decrease **61%** compared to Sep 24



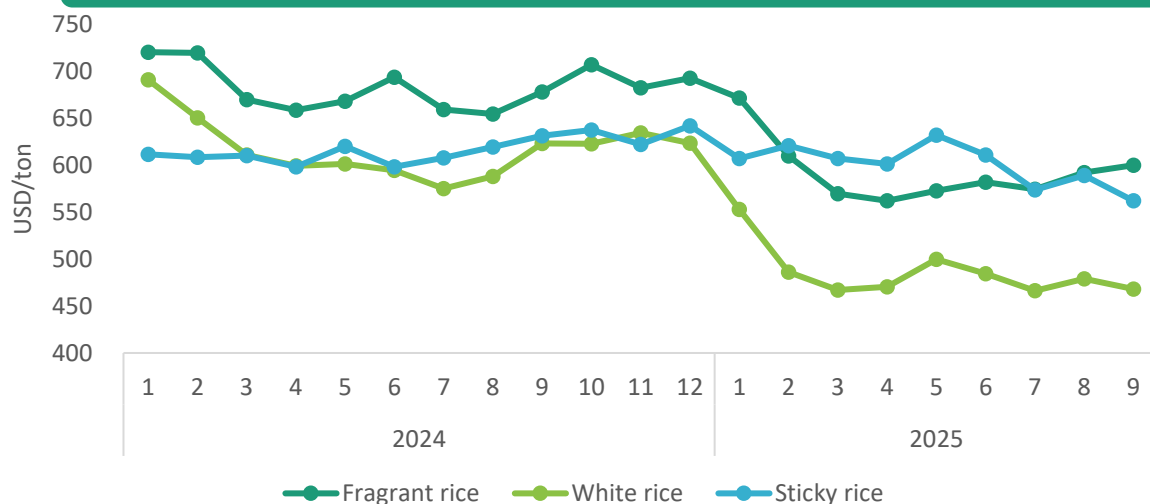
Sticky Rice

Value: **15.7** Mil. USD

Increase **24%** compared to Aug 25

Decrease **18%** compared to Sep 24

Average export price to ASEAN, Sep-2025



Sticky rice

The average export price in Sep-25 is **562** USD/ton; Decrease **5%** compared to the previous month; and Decrease **11%** compared to the same month in 2024.

Fragrant rice

The average export price in Sep-25 is **600** USD/ton; Increase **1%** compared to the previous month; and Decrease **12%** compared to the same month in 2024.

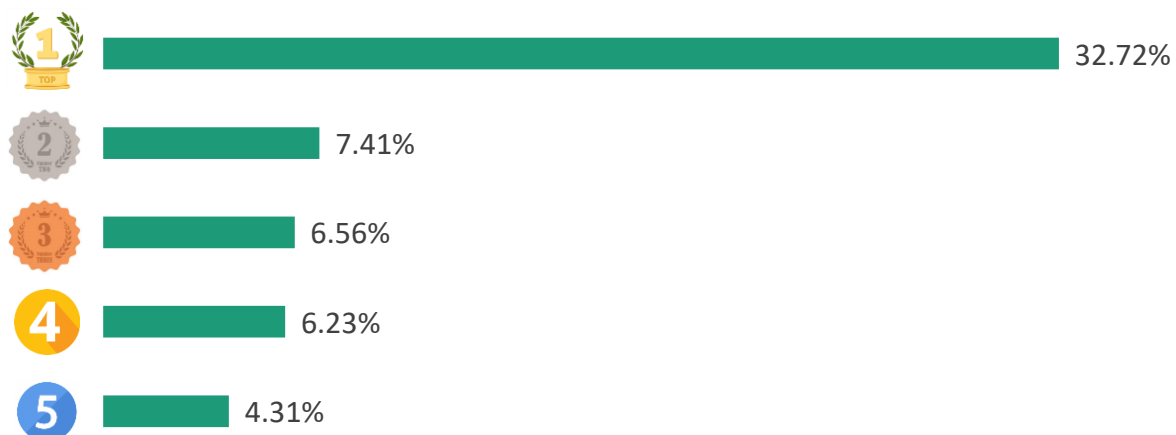
White rice

The average export price in Sep-25 is **468** USD/ton; Decrease **2%** compared to the previous month; and Decrease **25%** compared to the same month in 2024.

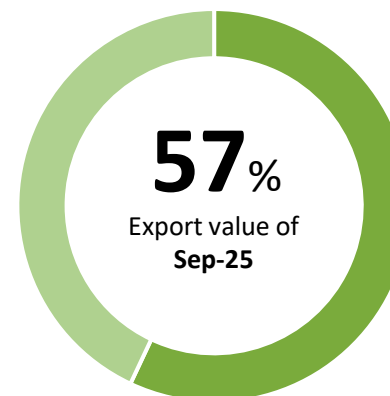


RICE

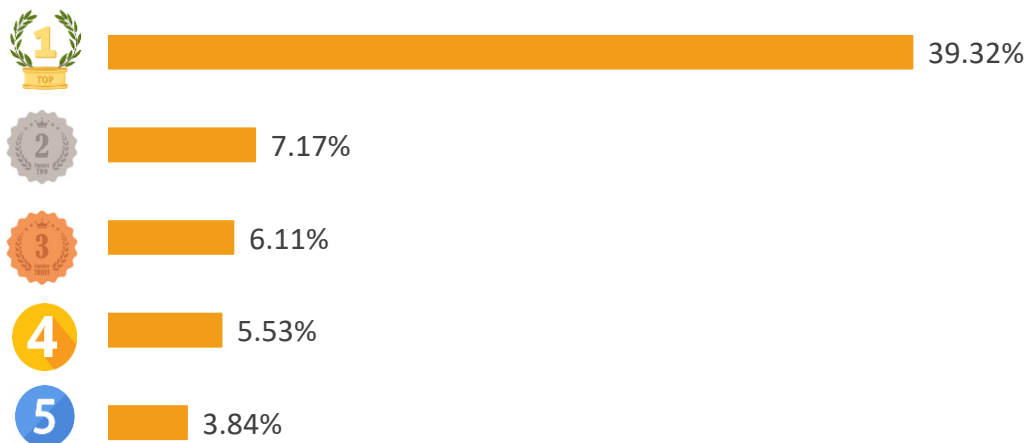
Top 5 export enterprises by Value to ASEAN, Sep-2025



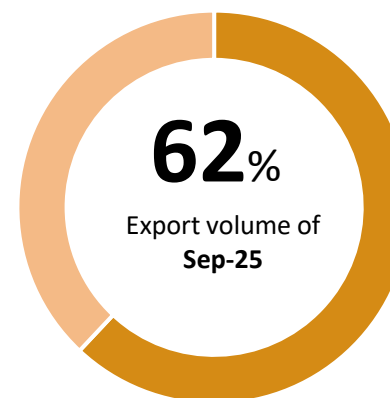
Value ratio of Top 5 export enterprise to ASEAN, Sep-2025



Top 5 export enterprises by volume to ASEAN, Sep-2025



Volume ratio of Top 5 export enterprise to ASEAN, Sep-2025





RICE

SPOTLIGHT

01



In the first nine months of 2025, Vietnam exported 6.82 million tons of rice, valued at \$3.48 billion, a 2% decrease in volume and a 20% decrease in revenue compared to the same period last year. Within ASEAN, exports to the Philippines – the largest market – dropped by 285,911 tons, or 8.8%, to 2.94 million tons. Exports to Indonesia fell by 97% from 1.03 million tons to 29,934 tons. Exports to Malaysia decreased by 42% to 363,251 tons, while exports to Cambodia dropped by 27.9% to 33,222 tons. Exports to Singapore declined by 2.1% to 121,731 tons, and exports to Brunei decreased by 24% to 66 tons.

Source: Mekongasean.vn

02

The Philippine Senate approved Resolution No. 29, officially calling on the government to restore the rice import tariff to 35% from the current 15%. Lawmakers acknowledged that the previous tax reduction was necessary at the time, but this policy has caused significant damage to the domestic rice industry. According to the Senators, reimposing a higher tariff is an urgent measure to stabilize the market, minimize losses for the production sector, and protect the livelihoods of farmers. This proposal also received support from the Philippine Department of Agriculture, which has repeatedly recommended gradually increasing the import tariff to protect the domestic market from price shocks.

Source: news.tv5.com.ph





RICE

SPOTLIGHT

03



The Philippine government approved Executive Order 102, officially extending the import ban on regular milled rice until December 31, 2025. However, this ban does not apply to specialty rice varieties. The extension aims to maintain market stability and protect domestic farmers from price pressures caused by imported rice. This decision comes in the context of a sharp decline in rice paddy prices, with some areas seeing prices as low as 8 PHP/kg (\$0.14/kg), compared to the average of 17.11 PHP/kg (\$0.29/kg) recorded in August 2025. The ban is a part of a series of measures to support the rice production sector, following President Marcos' issuance of Executive Order 101, which requires government agencies to prioritize purchasing agricultural products directly from domestic cooperatives.

Source: gmanetwork.com

04

Rice consumption in Malaysia is undergoing a notable shift, with consumers increasingly prioritizing brand and taste over price. This trend became more pronounced after the government reduced the price of imported white rice from 2,800 MYR (596 USD) per ton to 2,600 MYR (553 USD), significantly narrowing the price gap with domestically produced rice. Data from the subsidy program indicates that low prices are no longer the decisive factor for consumers; the consumption of cheaper rice only reached about 75% of the target. Based on this, Malaysia's Ministry of Agriculture is working on a proposal for a new comprehensive plan aimed at achieving a more balanced and sustainable solution for the entire rice value chain in the long term.

Source: thestar.com.my





RICE

SPOTLIGHT

05 Indonesia's Minister of Agriculture, Zulkifli Hasan, states that importing rice from Vietnam and Thailand is unreasonable for a significant agricultural potential like Indonesia. He emphasized that the situation completely changed in 2025, Indonesia achieved rice self-sufficiency and no longer to import rice in 2025, in contrast to the 4.52 million tons imported in 2024. This confidence is reinforced by data from the Central Statistics Agency (BPS), which shows that rice production in the first 11 months of 2025 is estimated to reach 33.19 million tons, a 12.62% increase compared to the same period last year, and is expected to result in a surplus of approximately 4 million tons by the end of the year.

Source: en.tempo.co





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Sep-25



Export results to the ASEAN, Sep-25

Value

29.6

Mil. USD

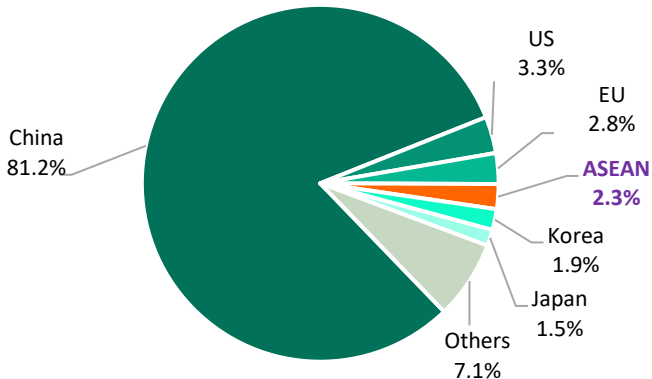
Increase **0.7%** compared to Aug 25

Decrease **41.4%** compared to Sep 24

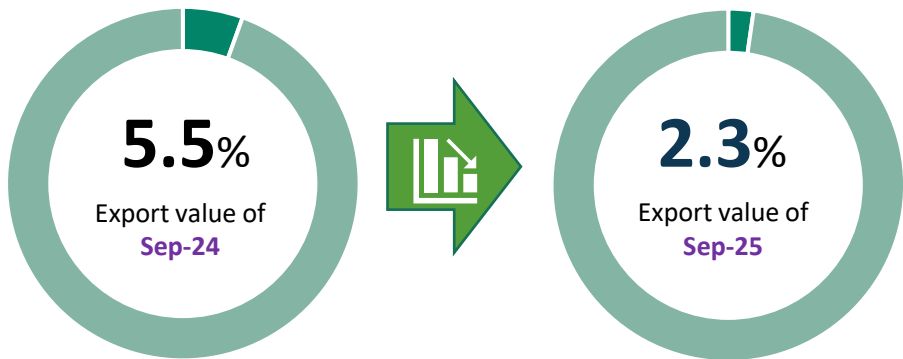
6.8 Mil. USD less than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **257.4 Mil. USD**, and the rate is **58.9%** of the total in 2024.

Percentage of export value to the ASEAN, Sep-25



Changes in percentage of export value to the ASEAN, Sep-25

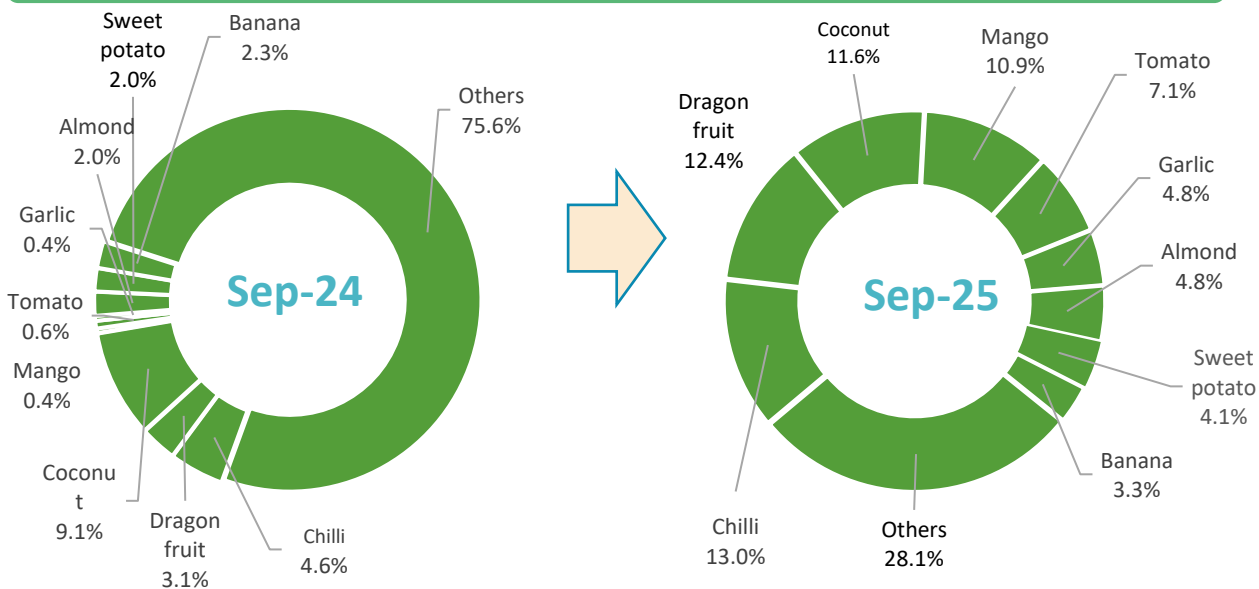


Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Sep-25



Export results to the ASEAN, Sep-25



Chillis

Value: **3.8** Mil. USD

Decrease **18.7%** compared to Aug 25

Increase **65.0%** compared to Sep 25



Dragon fruit

Value: **3.7** Mil. USD

Increase **44.1%** so với T3/2025

Increase **135.4%** compared to Sep 25



Coconuts

Value: **3.4** Mil. USD

Increase **93.8%** compared to Aug 25

Decrease **24.8%** compared to Sep 25



Mango

Value: **3.2** Mil. USD

Increase **78.1%** compared to Aug 25

Cao gấp **17 lần** compared to Sep 25



Potato

Value: **2.1** Mil. USD

Increase **54.8%** compared to Aug 25

Increase **554.7%** compared to Sep 25



Garlic

Value: **1.4** Mil. USD

Decrease **47.6%** compared to Aug 25

Increase **582.8%** compared to Sep 25



Almond

Value: **1.4** Mil. USD

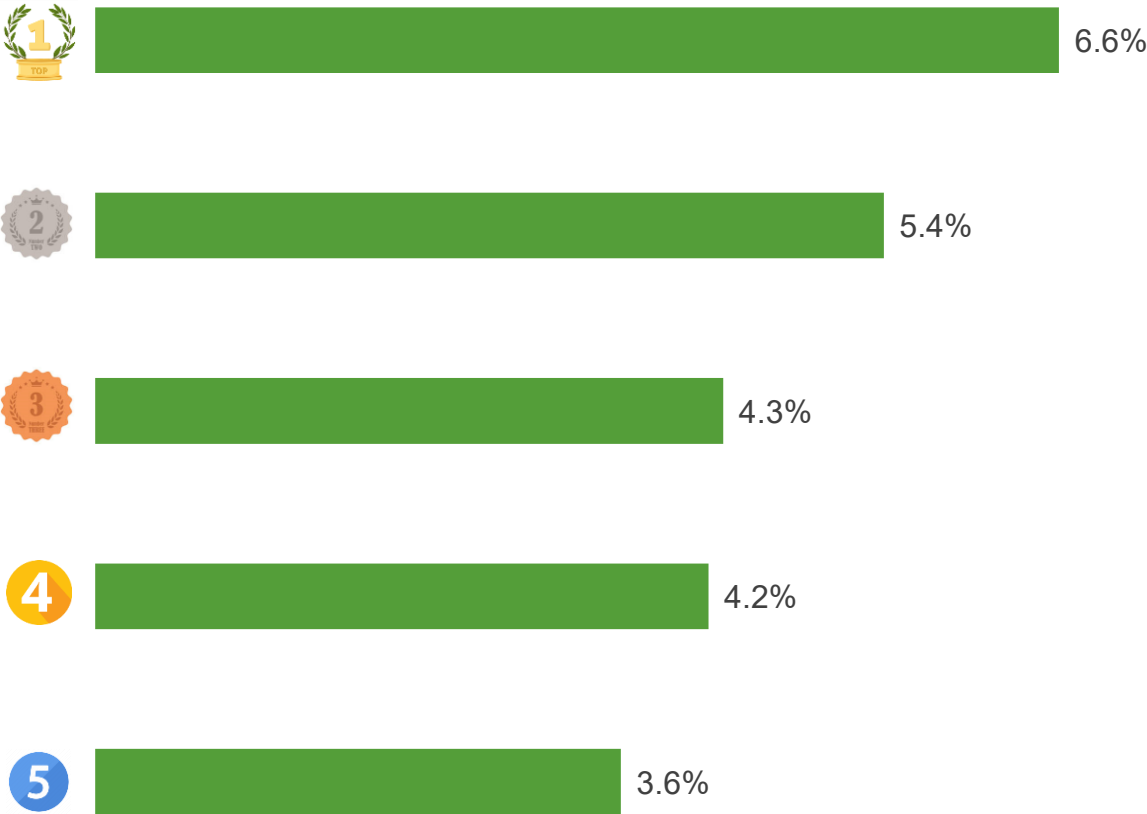
Decrease **12.6%** compared to Aug 25

Increase **38.1%** compared to Sep 25

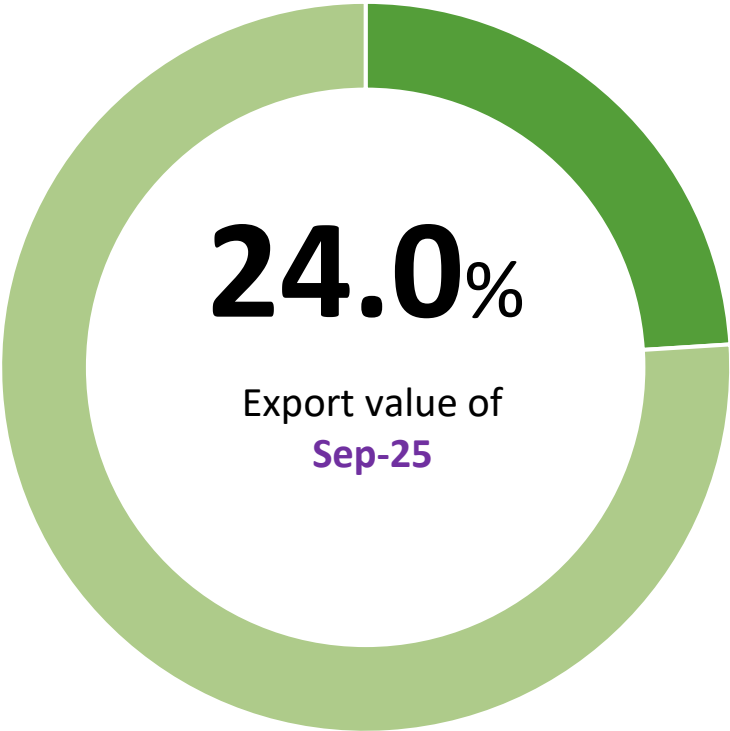


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Sep-2025



Value ratio of TOP 5 export enterprises to the ASEAN, Sep-2025



Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Sep-2025



Import results to the ASEAN, Sep-2025

VALUE



42.1

Mil. USD

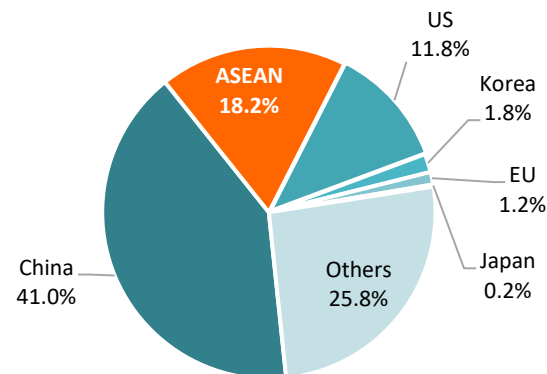
Decrease **8.8%** compared to Aug 25

Increase **65.7%** compared to Sep 25

16.3 Mil. USD more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **322.5 Mil. USD**, and the rate is **104.3%** of the total in 2024.

Percentage of import value to the ASEAN, Sep-2025



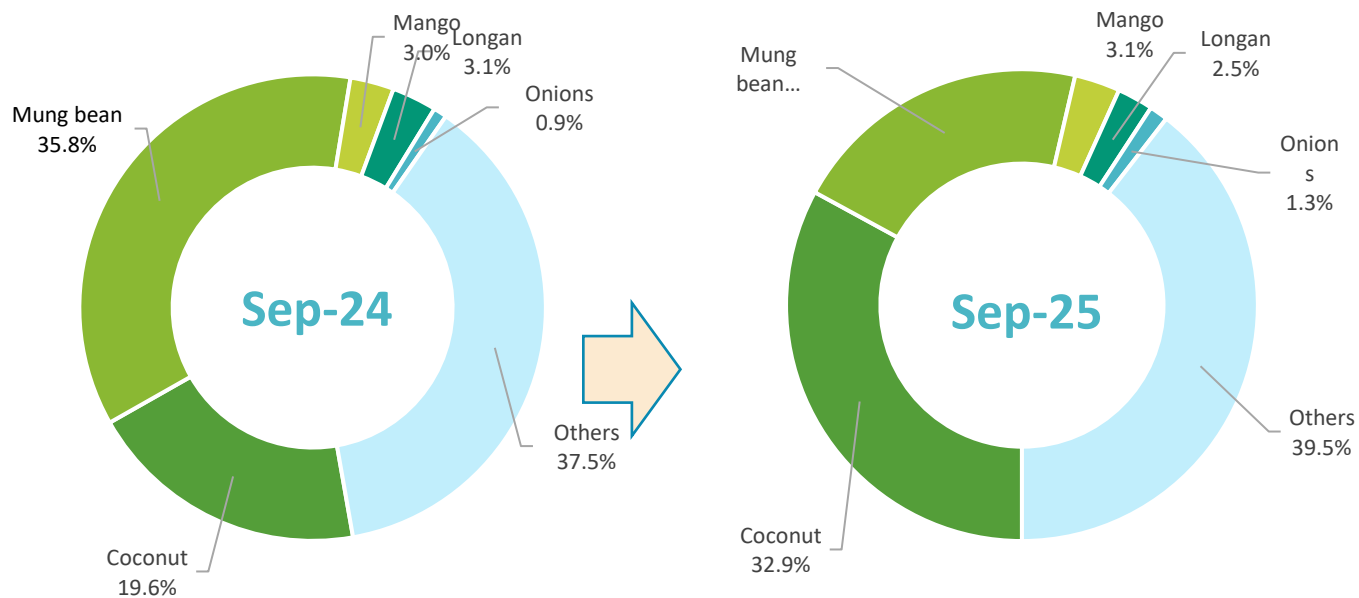
Changes in percentage of import value to the ASEAN, Sep-2025





FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Sep-2025



Mango

Value: **1.3** Mil. USD

Increase **211.6%** compared to Aug 25

Increase **70.5%** compared to Sep 25



Longan

Value: **1.0** Mil. USD

Decrease **68.6%** compared to Aug 25

Increase **31.0%** compared to Sep 25

Import results from the ASEAN, Sep-2025



Coconuts

Value: **13.9** Mil. USD

Decrease **3.7** compared to Aug 25

Increase **178.9%** compared to Sep 25



Mung bean

Value: **8.7** Mil. USD

Increase **55.1%** compared to Aug 25

Decrease **4.3%** compared to Sep 25



Onions

Value: **0.53** Mil. USD

Increase **2.9%** compared to Aug 25

Increase **125.6%** compared to Sep 25



The Philippines approves the import of onions and carrots to control price increases

The Philippine Department of Agriculture approved a plan to import red onions, white onions, and carrots to stabilize domestic retail prices. This decision has been made after the price of red onions surged to 140–160 PHP/kg (2.37–2.71 USD) amid suspicions that traders were hoarding stocks to manipulate the market. The Philippines plans to import about 3,000–5,000 tons of red onions, with delivery expected before the domestic harvest season in February. The country will also allow the import of a small quantity of carrots from China, the Netherlands, and Cambodia to mitigate rising prices domestically.

Source: Fructidor.com

Vegetable farmers in Malaysia call for applying import barriers to protect domestic farms.

Vegetable farmers in the Cameron Highlands urge the federal government to strengthen controls on vegetable imports to protect domestic production. According to the Cameron Highlands Vegetable Growers Association (CHVGA), imported vegetables are currently entering the market with low tariffs and minimal oversight, making it difficult for local farmers to compete due to higher domestic production costs. As a result, they are calling on the government to reconsider import quotas, tighten plant quarantine standards, and apply varying tariffs that would favor local products. They warn that without these measures, many small-scale farmers may completely abandon vegetable farming in favor of alternative crops or exit the industry entirely.

Source: Fructidor.com





Laos launched a durian planting project to boost exports to China.

A 25-year agricultural collaboration project between the National Agriculture and Forestry Research Institute of Laos (NAFRI) and EK Farmland is underway to develop a high-quality durian farm in Huay Kham village, Sangthong district, Vientiane. The initial phase covers 6 hectares, using advanced cultivation techniques to increase yield, reduce costs, and enhance the international competitiveness of Laotian durian. The project also aims to cooperate with local farmers, share profits, and create stable employment, contributing to the development of a sustainable supply chain. According to the plan, by 2026, Laos aims to export 400 tons of premium durian, primarily to China.

Source: Nongnghiepmoitruong.vn

Thailand introduced the premium fruit products at the 2025 China International Agricultural Trade Fair.

Thailand introduced premium fruits, processed agricultural products, and smart agriculture solutions at the 2025 China International Agricultural Trade Fair (CATF 2025), held from October 17 to 19 in Tianjin, China. This event was part of the "Thailand Agricultural Trade 2025" initiative aimed at enhancing the global presence of Thai agricultural products. The exhibition showcased a diverse range of Thai fruits, including durian, Nam Dok Mai mango, coconut, jackfruit, longkong, lychee, and pomelo, as well as processed agricultural products and dried fruits.

Source: Vietnambiz.vn





WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025

VALUE



31

Mil. USD

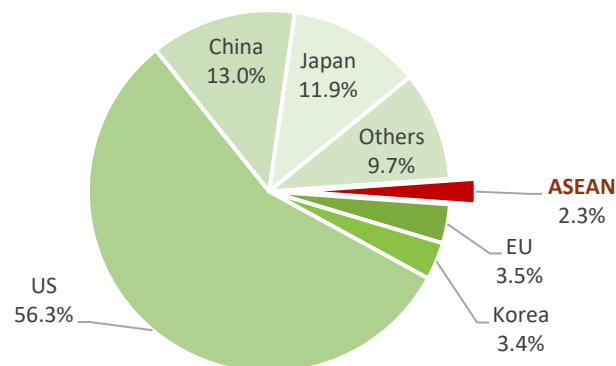
Decrease **6.2%** compared to Aug 25

Increase **50.4%** compared to Sep 24

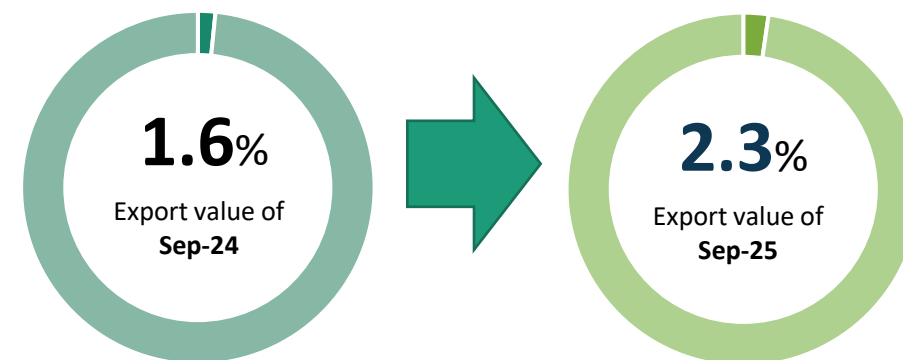
↑ **3.2 Mil. USD** more than the monthly average rate in 2024

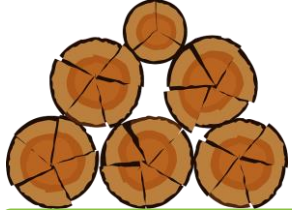
Accumulated 9 months of 2025 reaches **269.4 Mil. USD**, and the rate is **81.9%** of the total in 2024.

Percentage of export value to ASEAN, Sep-2025



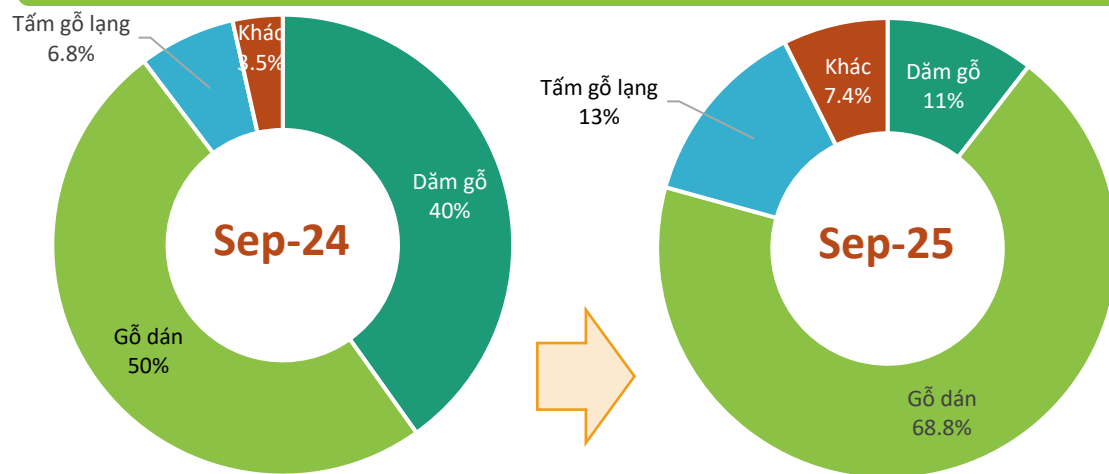
Changes in percentage of export value to ASEAN, Sep-2025





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025



Plywood

Value: **22.5** Mil. USD

Decrease **6%** compared to Aug 25

Increase **40%** compared to Sep 24



Wood chips

Value: **3.4** Mil. USD

Decrease **58%** compared to Aug 25

Decrease **73%** compared to Sep 24



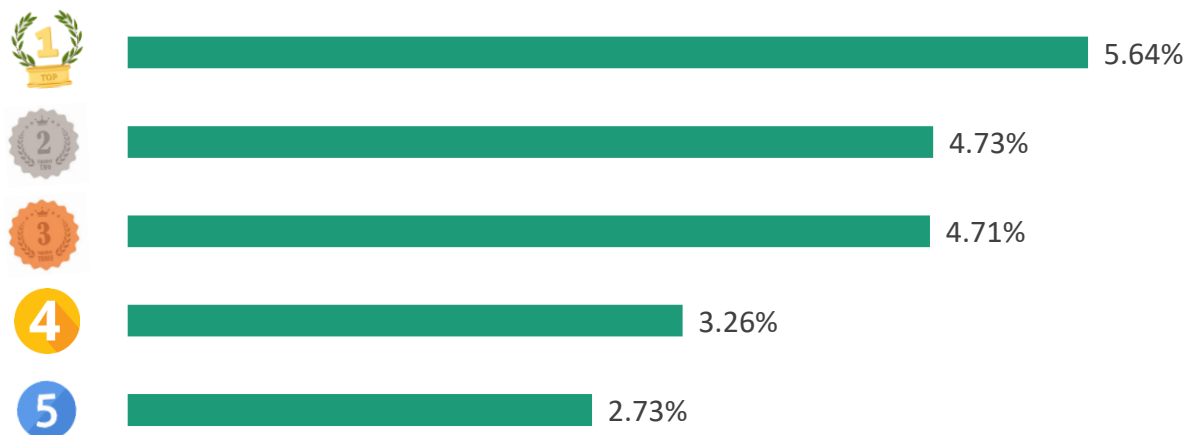
Wood slabs

Value: **4.4** Mil. USD

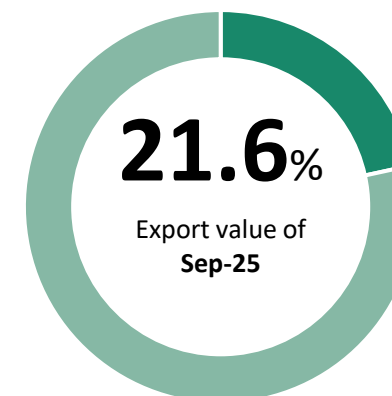
Increase **9%** compared to Aug 25

Decrease **106%** compared to Sep 24

TOP 5 export enterprises by value to ASEAN, Sep-2025



Value ratio of TOP 5 export enterprises to ASEAN, Sep-2025





Malaysia's furniture industry is facing significant pressure from the new tariff policies imposed by the United States. According to the Muar Furniture Association (MFA), finding alternative markets in the short term is challenging, as no other market can match the size and stability of demand that the U.S. offers.

Additionally, the industry faces rising domestic costs due to the SST tax and labor regulations, which weaken the international competitiveness of Malaysian wood products.



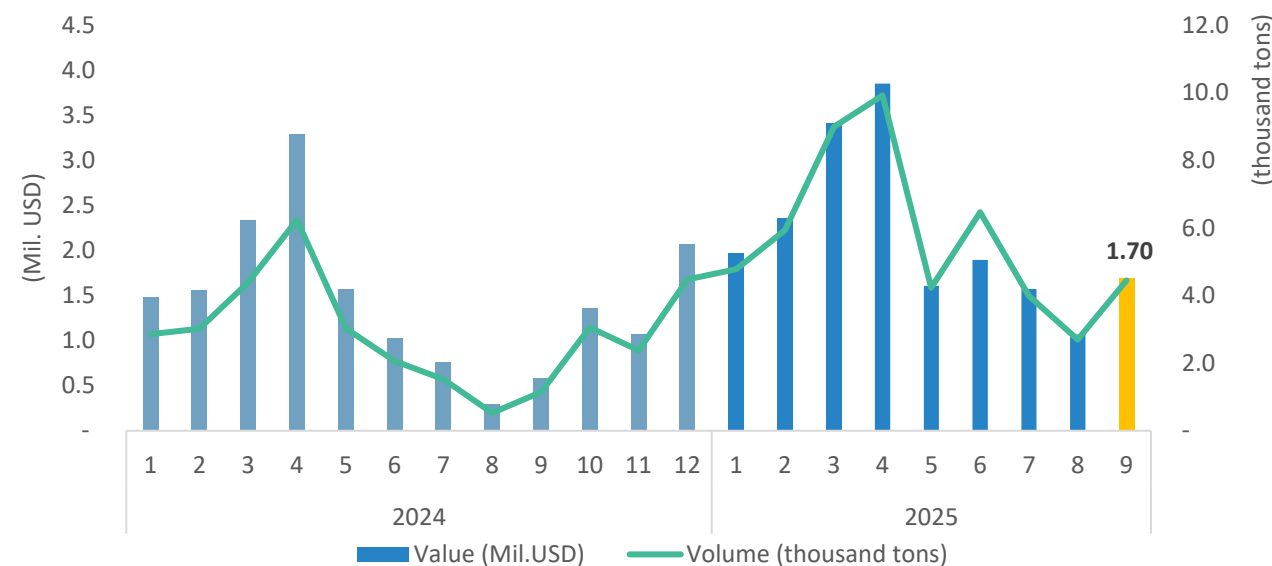
The Indonesian plywood industry is experiencing positive growth despite global economic uncertainties. According to forecasts from the Eximbank Institute of Indonesia, plywood export revenue is expected to grow by 8% in 2025 and further increase by 4% in 2026. The main driver of this growth is steady demand from key markets such as the United States.

However, the furniture industry is facing significant challenges due to the new U.S. tariff policies. The imposition of a 25% tariff on kitchen cabinets, vanities, and upholstered furniture starting from October 14, 2025, is expected to heavily impact Indonesian exporters, as the U.S. accounts for more than half of the industry's total export value. It is forecasted that orders for upholstered furniture could decline by 20-35% over the next 3-6 months, putting significant pressure on contract manufacturers.



CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Sep-25



Export results to ASEAN, Sep-25

VALUE

1.7 Mil. USD

↗ Increase **59%** compared to Aug 25

↗ Increase **84%** compared to Sep 25

↓ **0.67** Mil. USD less than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **19.4** Mil.USD, and the rate is **68.5%** Value of the total in 2024.

VOLUME

4.45 thousand tons

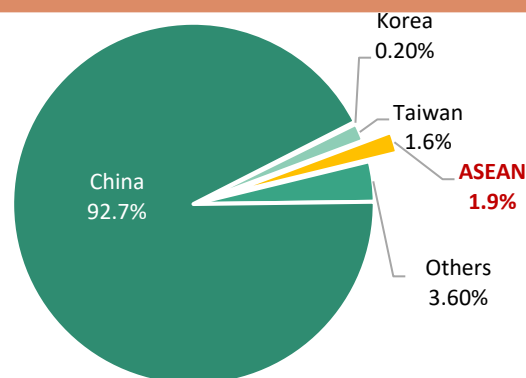
↗ Increase **65%** compared to Aug 25

↗ Increase **116%** compared to Sep 25

↓ **0.3** thousand tons less than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **51.5** thousand tons, and the rate is **90.8%** of the total in 2024.

Percentage of export value to ASEAN, Sep-25



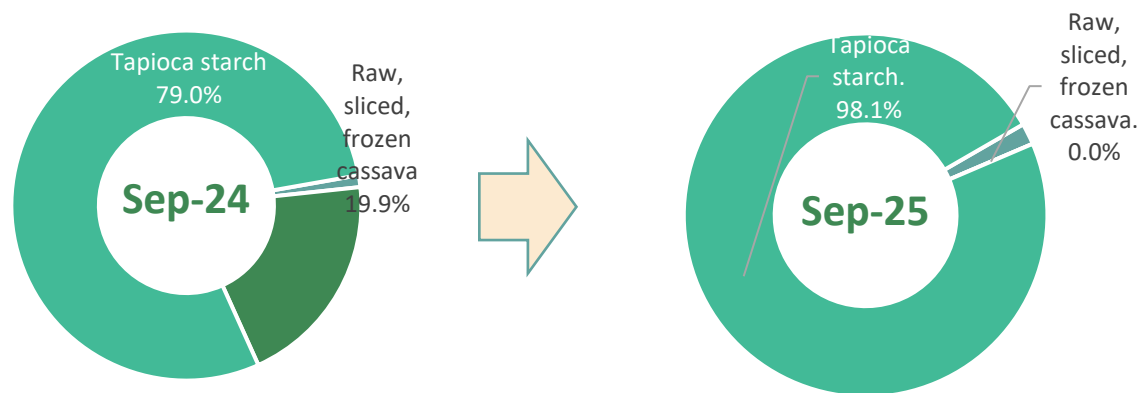
Changes in percentage of export value to ASEAN, Sep-25



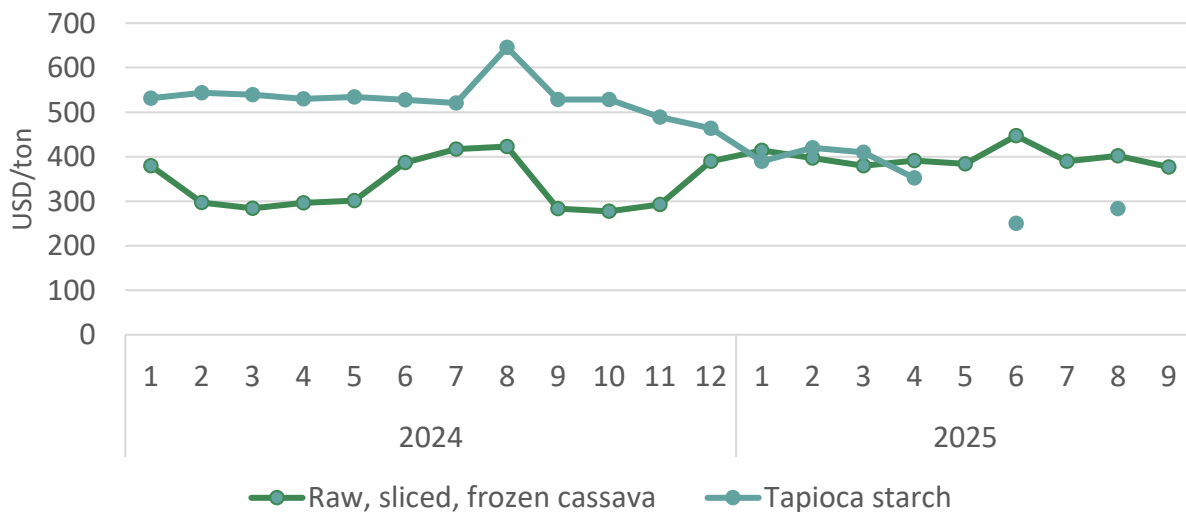


CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Sep-2025



Percentage of export value to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025



Raw, sliced, frozen cassava

Value: **32.3** nghìn USD

Decrease **19.1%** compared to Aug 25

Increase **408%** compared to Sep 25



Tapioca starch

Value: **1.66** Mil. USD

Increase **8.697 lần** compared to Aug 25

Increase **263%** compared to Sep 25

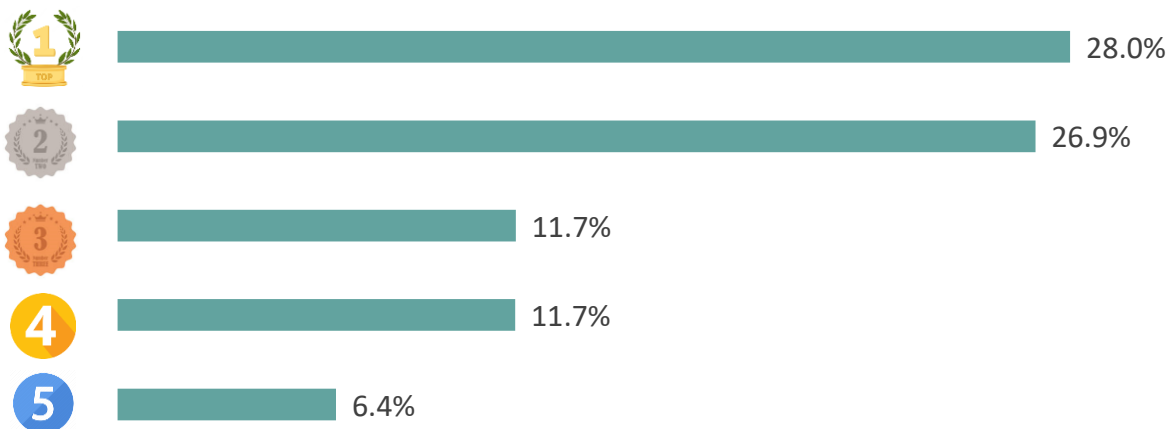
Tapioca starch

The average export price in Aug-25 is c **377** USD/ton; Decrease **6.1%** compared to the previous month; and Decrease **28.6%** compared to the same month in 2024.

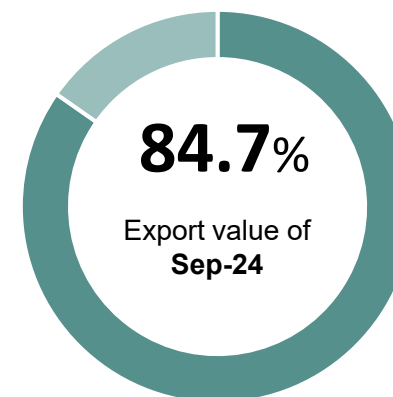


CASSAVA & CASSAVA PRODUCTS

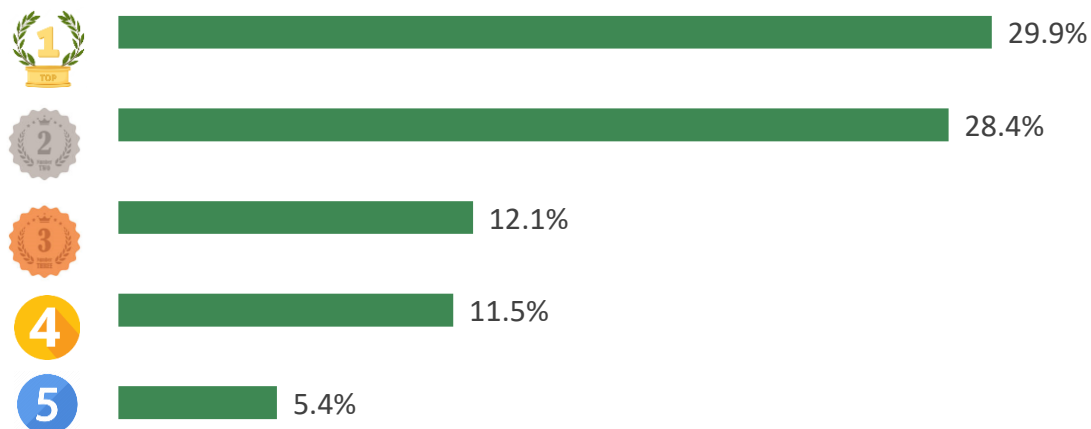
TOP 5 export enterprises by to ASEAN, Sep-2025



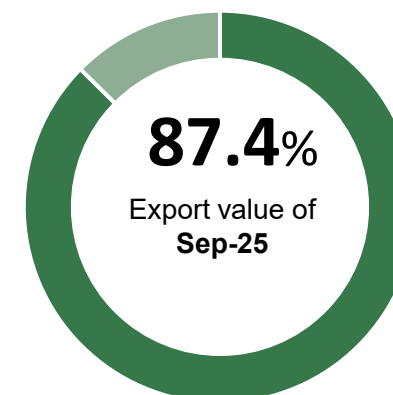
Value ratio of TOP 5 export enterprises to ASEAN, Sep-2025



TOP 5 export enterprises by volume to ASEAN, Sep-2025



Volume ratio of TOP 5 export enterprises to ASEAN, Sep-2025





Thailand promotes the development of clean cassava varieties to maintain export competitiveness.

Thai cassava producers are calling on the government to address the issues of cassava leaf mosaic disease and the shortage of clean seeds to enhance productivity and reduce production costs amidst increasing competition from neighboring countries. According to the Thai Tapioca Starch Trade Association, Thailand's cassava starch exports are facing significant pressure from Vietnam and Laos. These two countries currently host 25-26 cassava starch factories built by investors from China and Vietnam. Due to lower production costs and the depreciation of the Vietnamese dong, Vietnam's cassava starch export prices are about 40-50 USD/ton lower than Thailand's, enabling Vietnam to rapidly expand its market share in China.

In response, Thailand's Cassava Policy and Management Committee (CPMC) has approved a budget for developing clean, disease-resistant cassava varieties, while the Ministry of Commerce is focusing on expanding new export markets to Japan, the UAE, North America, and Europe. The ministry is also encouraging the development of downstream products such as animal feed, food, chemicals, adhesives, and paper to add value and reduce dependency on raw starch exports..

Source: moit.gov.kh





Indonesia tightens cassava and ethanol imports to protect domestic production.

Indonesia's Ministry of Trade has recently issued two new regulations to control over cassava and ethanol imports, with the goal of stabilizing the supply for the domestic industry while protecting the interests of local farmers and businesses.

Under the new regulations, only production companies with a valid API-P code will be allowed to import cassava products, provided that they have been approved by the Ministry of Industry or can demonstrate a genuine need for imports. Customs will closely monitor all clearance activities. The Ministry also plans to include cassava in the national commodity balancing list to manage supply and demand more effectively.

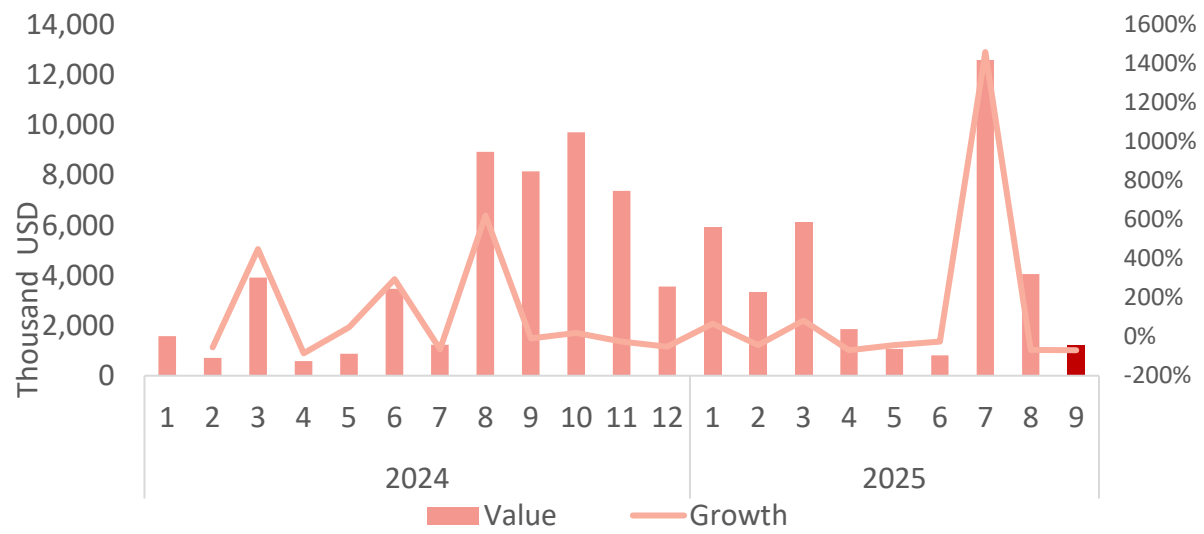
For ethanol, instead of the previous free import mechanism, companies will now need approval and will be closely monitored to prevent negative impacts on the domestic sugar market. The regulations are also designed to contribute to energy security, ensure self-sufficiency in sugar, and promote the development of a green economy..





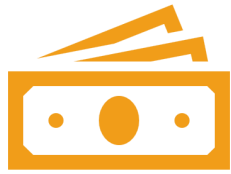
MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Sep-2025



Export results to ASEAN, Sep-2025

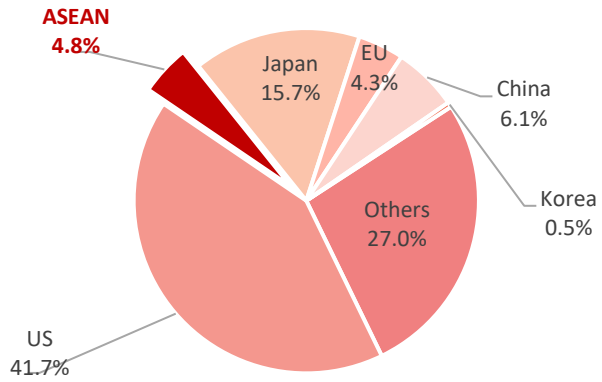
Value



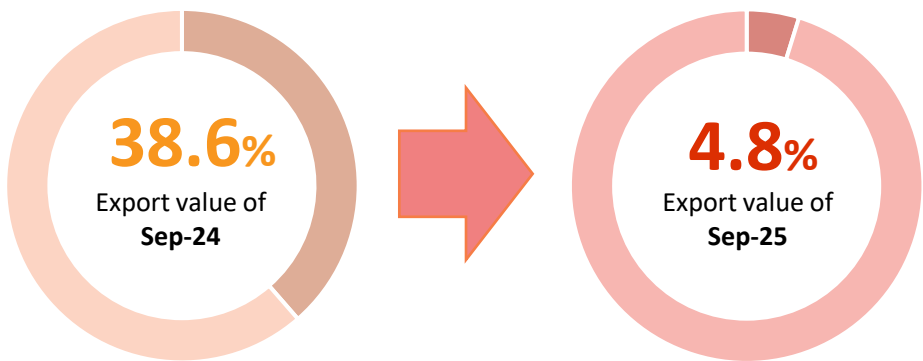
1.22
Mil.USD

- Decrease **69.8%** compared to Aug 25
- Decrease **85%** compared to Sep 25
- 2.95 Mil. USD less than the monthly average rate in 2024
- Accumulated 9 months of 2025 reaches **37.0 Mil. USD**, and the rate is **73.9%** Of the total in 2024.

Percentage of export value to ASEAN, Sep-2025



Changes in percentage of export value to ASEAN, Sep-2025

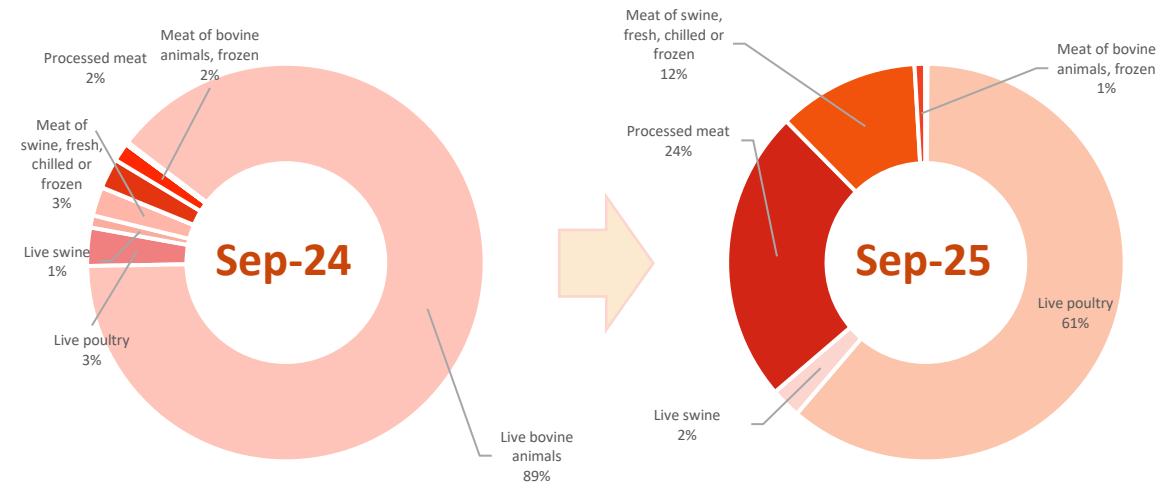


Source: Calculated from data of the Department of Customs



MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Sep-2025

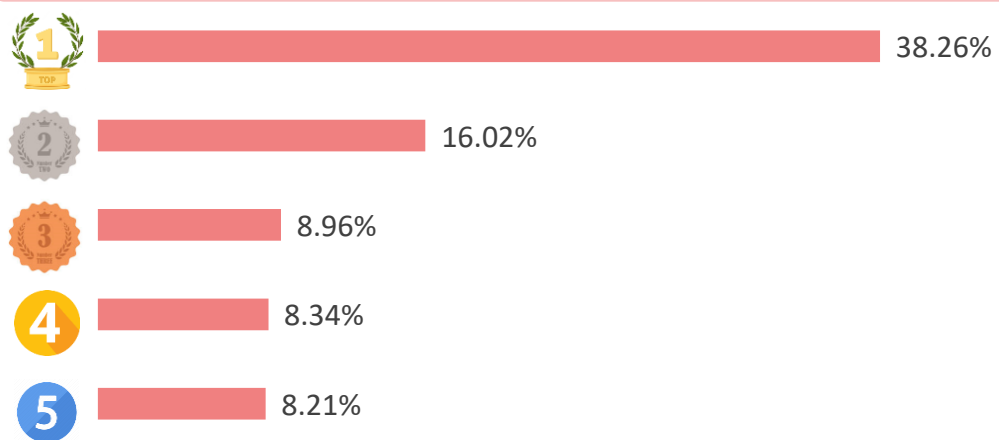


Export results to ASEAN, Sep-2025

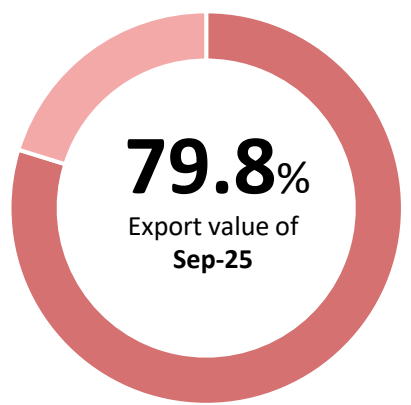


Live poultry
Value: **747** nghìn USD
Increase **12%** compared to Aug 25
Increase **194%** compared to Sep 25

Percentage of export value to ASEAN, Sep-2025



Changes in percentage of export value to ASEAN, Sep-2025

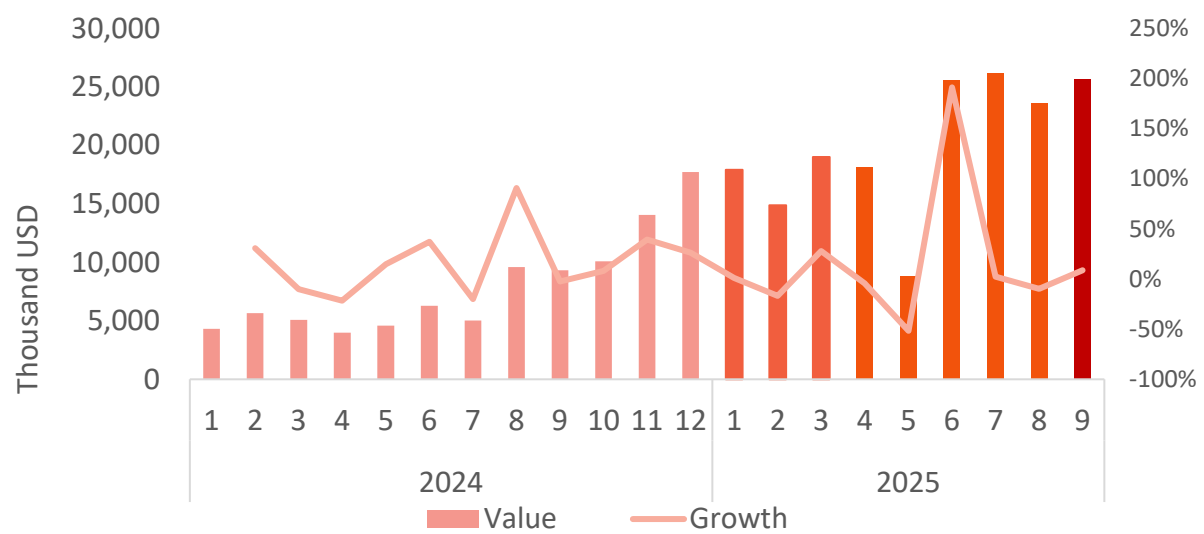


Source: Calculated from data of the Department of Customs




MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Sep-2025



Import results to ASEAN, Sep-2025

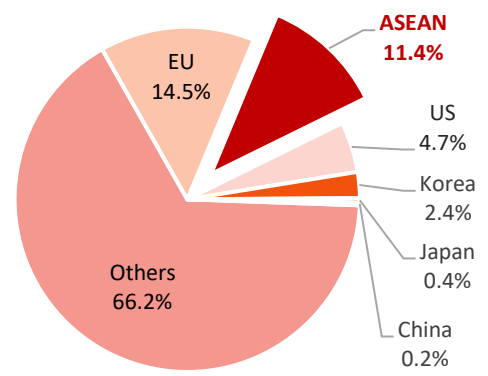


25.6
Mil. USD

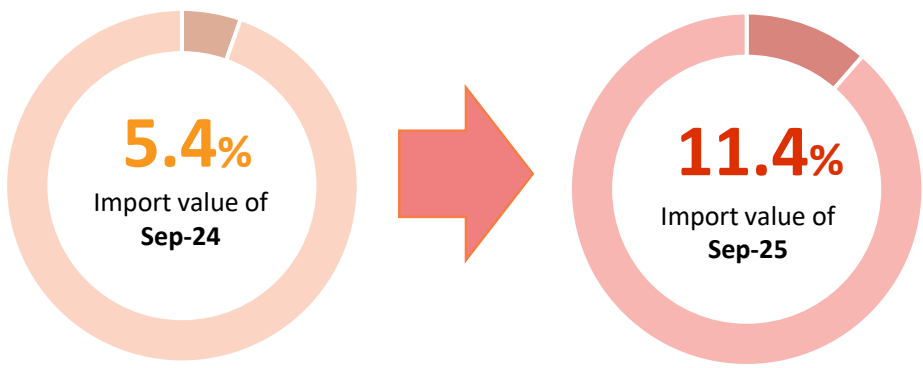
VALUE

- Increase **8.6%** compared to Aug 25
- Increase **174.4%** compared to Sep 25
- **17.6 Mil.USD** more than the monthly average rate in 2024
- ◆ Accumulated 9 months of 2025 reaches **179.6 Mil. USD**, and the rate is **188%** of the total in 2024

Percentage of import value to ASEAN, Sep-2025



Changes in percentage of import value to ASEAN, Sep-2025

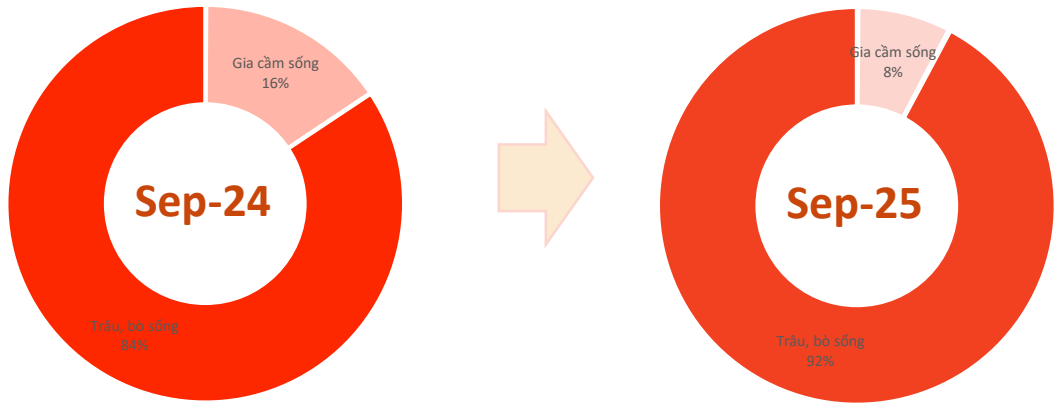


Source: Calculated from data of the Department of Customs



MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Sep-2025



Import results to ASEAN, Sep-2025



Live bovine animals

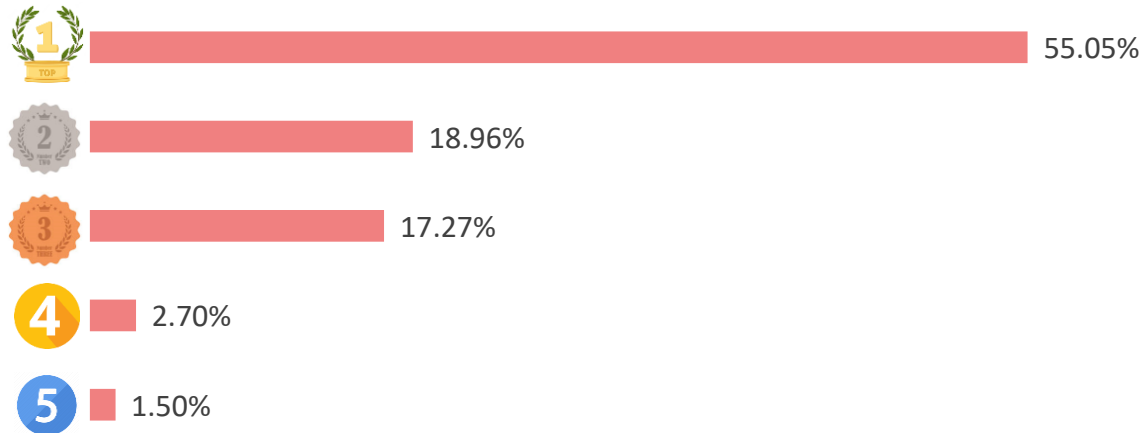
Value: **23.7** Mil. USD
Increase **12.2%** compared to Aug 25
Increase **198.9%** compared to Sep 25



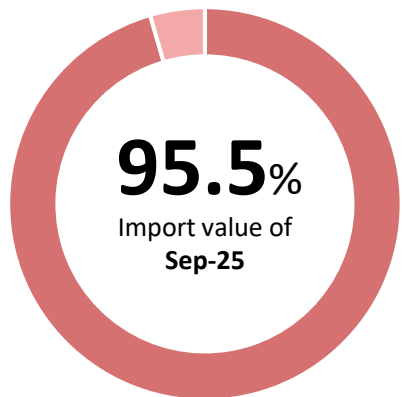
Live poultry

Value: **1.93** Mil. USD
Decrease **22.97%** compared to Aug 25
Increase **33.09%** compared to Sep 25

Percentage of import value to ASEAN, Sep-2025



Changes in percentage of import value to ASEAN, Sep-2025



Source: Calculated from data of the Department of Customs



MEAT & MEAT PRODUCTS

SPOTLIGHT



Philippines' pork production will increase by 2% in 2026, reaching approximately 980,000 tons. This growth is primarily driven by the government's efforts to enhance African Swine Fever (ASF) vaccination campaigns, strengthen biosecurity measures in livestock farming, and implement modern technologies. Additionally, the expected decrease in feed prices will help lower production costs and improve profits for farmers.

According to the Philippines Statistics Authority, due to a resurgence of ASF outbreaks in the second half of 2024, pork production in 2024 dropped by 5% compared to 2023 and continued to decline by 5.6% in the first half of 2025. By July 1, 2025, the total pig population in the country had fallen to 9.01 million, the lowest level since 2019. In 2026, pork consumption is forecast to increase by 4%, reaching about 1.73 million tons, driven by stable population growth and economic expansion. The government is also maintaining policies to control inflation within the target range, ensuring that consumers have access to affordable pork products.

Despite the challenges in domestic production due to disease outbreaks, pork imports in 2026 are expected to rise by 7%, reaching approximately 750,000 tons. The increase in demand for imports is primarily due to population growth and limited domestic supply. Brazil is forecast to be the main supplier, benefiting from its newly granted export license and competitive prices.





For feedback, please send to:

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