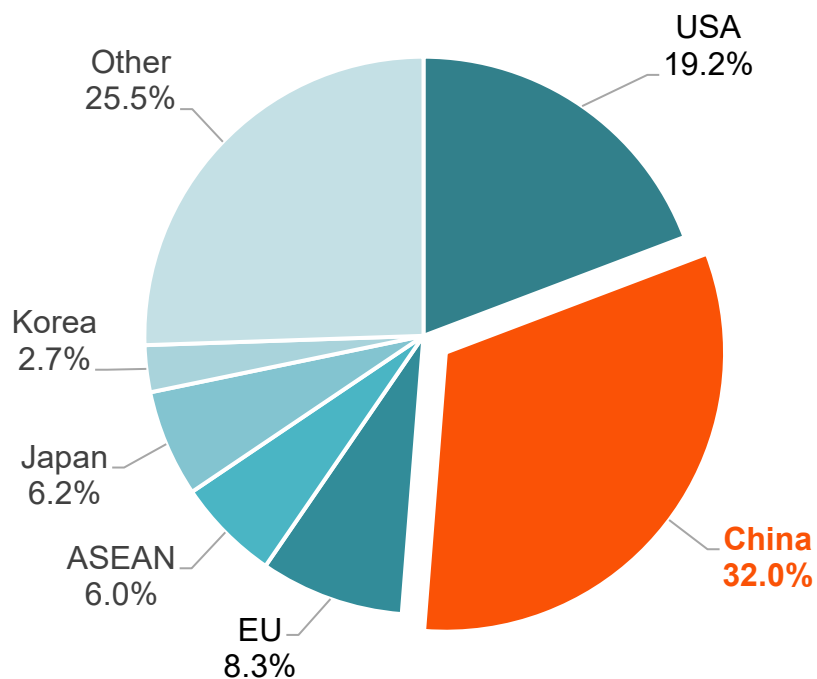


MONTHLY REPORT ON
AGRI-PRODUCT EXPORT
**FROM VIETNAM TO
China MARKET**



THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO THE CHINA IN SEP-2025

Percentage of AFF product export value to the China, Sep-2025



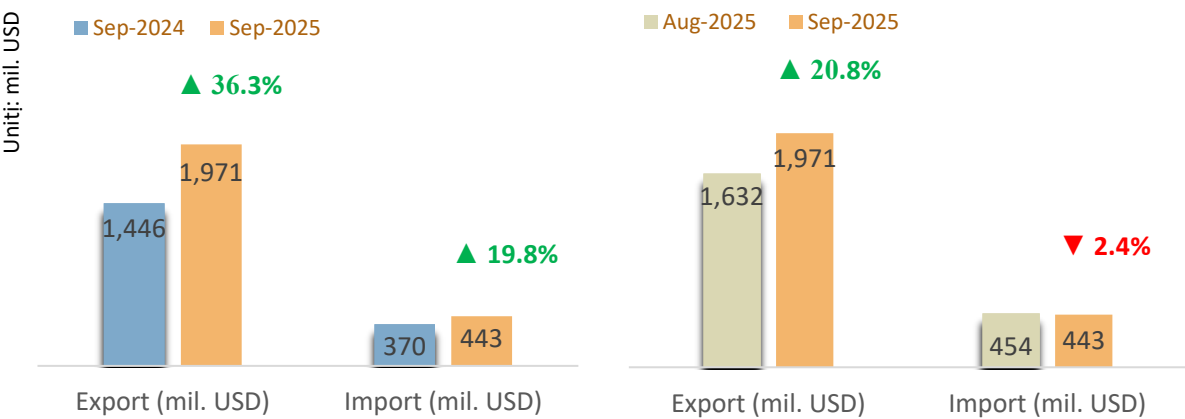
Changes in percentage of AFF product export value to the China, Sep-2025 compared to Aug-2025 and Sep-2024

| Market | Value (mil. USD) | Compared to Aug-2025 | Compared to Sep-2024 |
|----------------|-------------------|----------------------|----------------------|
| USA | 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 value of | 6.159 | | |

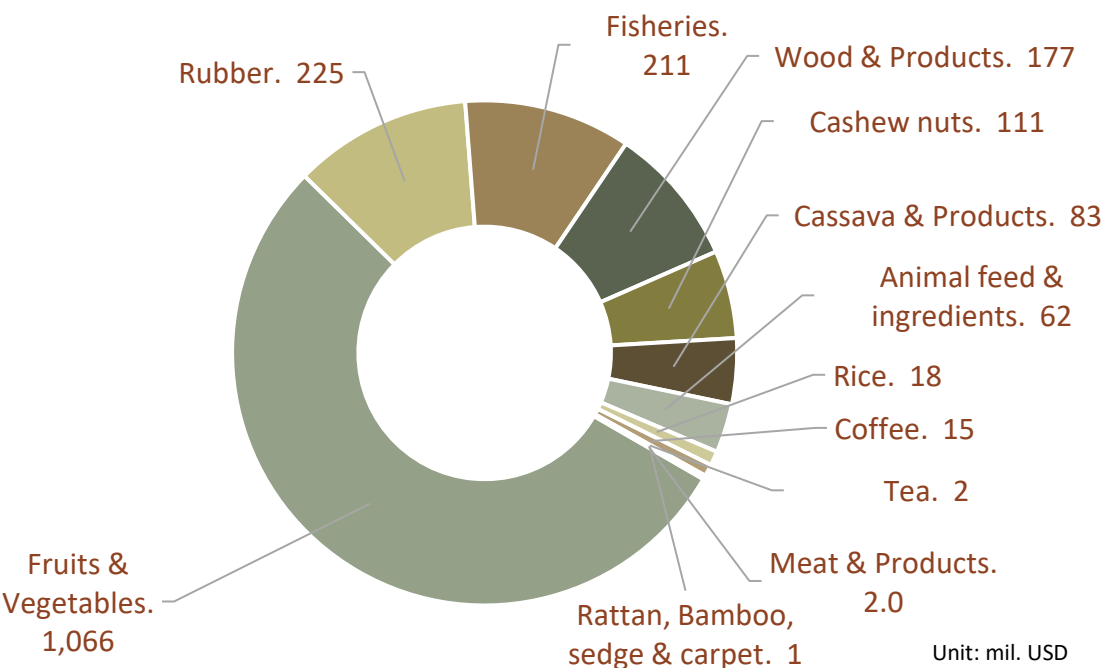
Source: Calculated from data of the Department of Customs

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

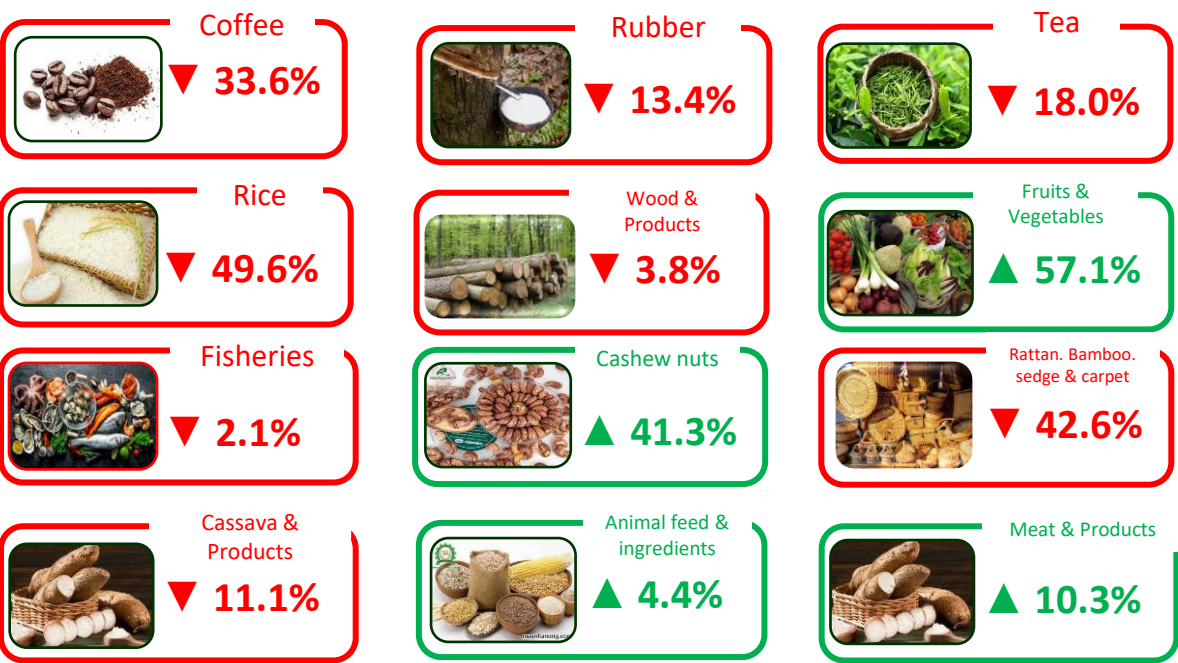
AFF product import-export turnover between Vietnam and China, Sep-2025



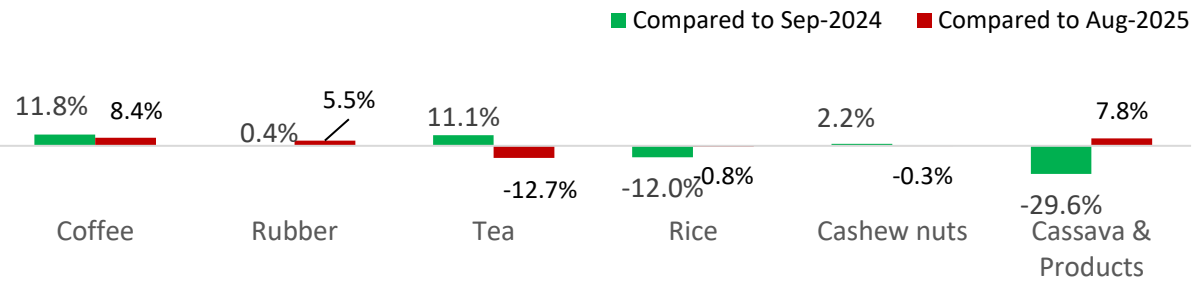
Key AFF product export value to China, Sep-2025



Changes in key AFF product export value to China in Jul-2025 compared to Jun-2025



Changes in average export value of key AFF products to China in Sep-2025 compared to Sep-2024 and compared to Aug-2025



Source: Calculated from data of the Department of Customs

China announces new five-year economic plan

On October 23, at the Fourth Plenary Session of the Central Committee, China announced its 15th Five-Year Economic Plan (2026–2030), continuing to pursue high-quality economic development, deepening reforms, and enhancing effective coordination between the market and government, while also ensuring national security.

The key goals of the plan include:

promoting high-quality growth, strengthening science and technology self-reliance, advancing institutional reforms, improving people's living standard, safeguarding national security, and fostering sustainable development under the vision of a "Beautiful China."

To achieve these objectives, Beijing aims to build a modern industrial system, boost technological innovation and self-sufficiency, expand the domestic market, support new growth models, and

accelerate opening-up and international cooperation. The plan also emphasizes modernizing agriculture and rural areas and advancing green transformation. The full details of the plan will be released at the National People's Congress in March 2026.



Source: Vnexpress.net

China tightens regulations on agricultural imports

The General Administration of Customs of China (GACC) issued Decree No. 280, replacing Decree No. 248, effective June 1, 2026, with stricter regulations on the registration of agriculture and food exporters.

According to Decree 280, only products in the list that announced by Chinese agencies are eligible for registration through competent authorities, instead of the self-registration mechanism used previously. Product categories outside the approved list will not be cleared for customs, requiring businesses to closely monitor regulatory updates to avoid producing goods that do not meet export

requirements. Enterprises that change their legal information (such as address, representative, or business license) will be suspended their export registration codes and must reapply. The validity period of export codes will be adjusted flexibly and automatically renewed, depending on the product type. Additionally, China tightens food safety and quarantine measures, with particular focus on packaging standards and disease control procedures.



Source: Vnexpress.net





FRUITS & VEGETABLES (EXPORT)

Export volume and value to China, Sep-2025



Export results to China, Sep-2025

VALUE



1.066

mil. USD

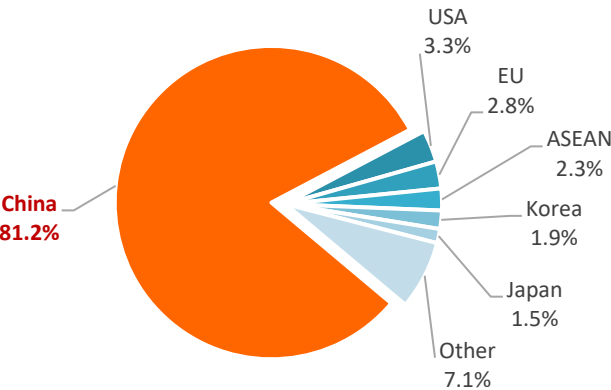
Increases **57.1%** compared to Aug-2025

Increases **50.1%** compared to Sep-2024

679.7 mil. USD more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **3.9 bil. USD**, **83.3%** of total 2024

Percentage of export value to China, Sep-2025



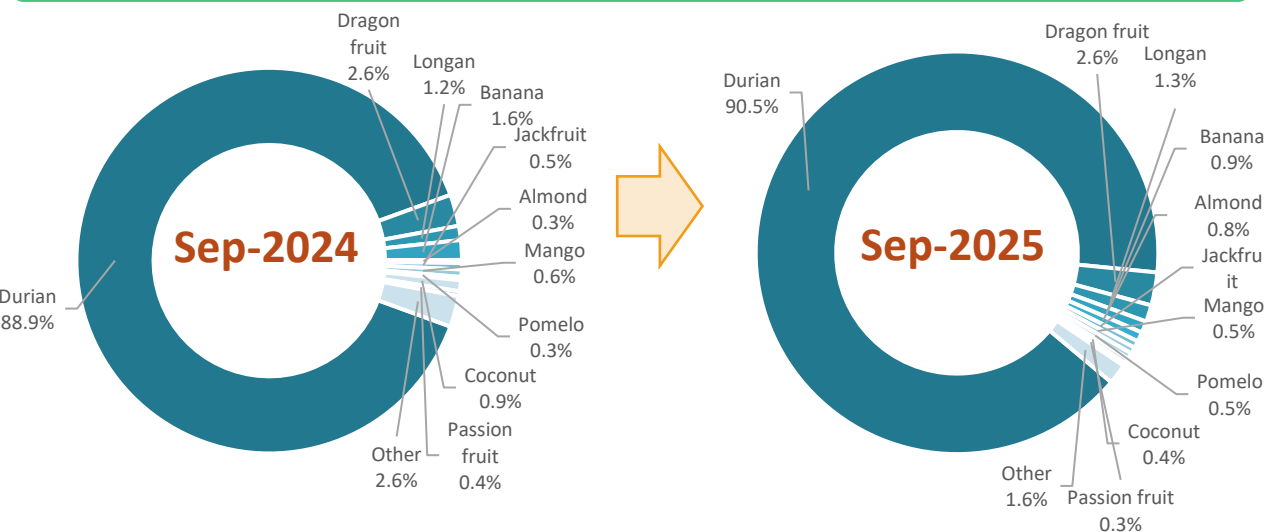
Changes in percentage of export value to China, Sep-2025





FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to China, Sep-2025



Export results of some main products to China, Sep-2025



Durian

Value: **963.9** mil. USD

Increases **68.1%** compared to Aug-2025

Increases **52.7%** compared to Sep-2024



Dragon fruit

Value: **28.2** mil. USD

Increases **42.4%** compared to Aug-2025

Increases **50.5%** compared to Sep-2024



Longan

Value: **14.3** mil. USD

Increases **10.8%** compared to Aug-2025

Increases **68.6%** compared to Sep-2024



Banana

Value: **9.9** mil. USD

Decreases **17.5%** compared to Aug-2025

Decreases **15.3%** compared to Sep-2024



Almond

Value: **8.2** mil. USD

Decreases **6.2%** compared to Aug-2025

Increases **344.5%** compared to Sep-2024



Jackfruit

Value: **6.0** mil. USD

Decreases **13.7%** compared to Aug-2025

Increases **58.9%** compared to Sep-2024



Mango

Value: **5.5** mil. USD

Increases **73.7%** compared to Aug-2025

Increases **25.6%** compared to Sep-2024



Pomelo

Value: **5.2** mil. USD

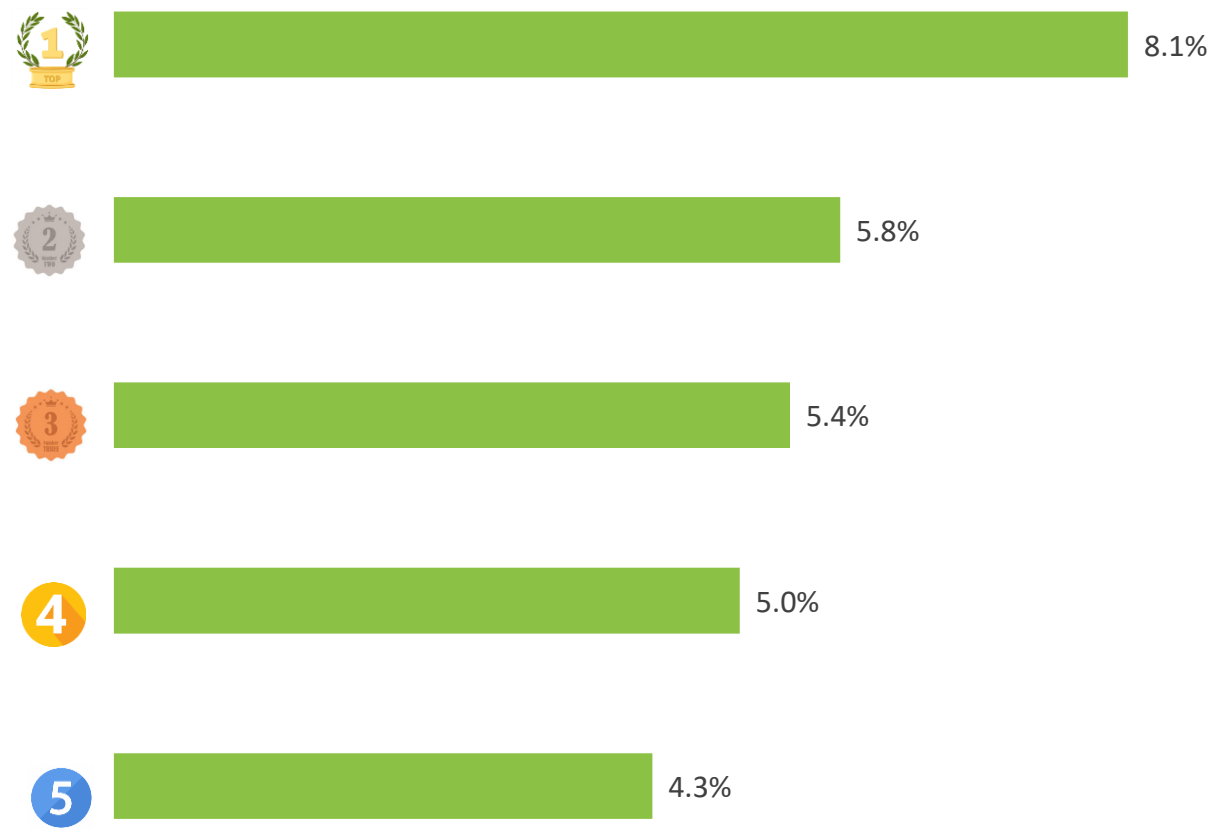
Increases **29.9%** compared to Aug-2025

Increases **170.6%** compared to Sep-2024

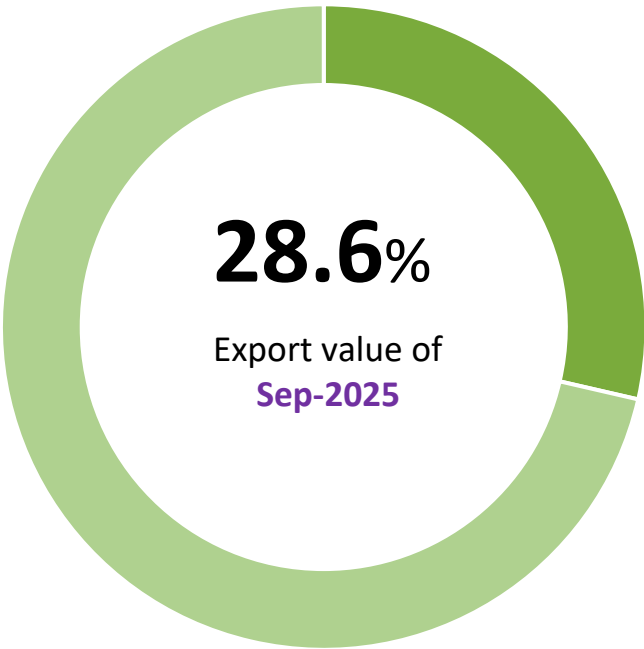


FRUITS & VEGETABLES (EXPORT)

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



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



Source: Calculated from data of the Department of Customs



FRUITS & VEGETABLES (IMPORT)

Import volume and value from China, Sep-2025



Import results from China, Sep-2025

VALUE



94.6

mil. USD

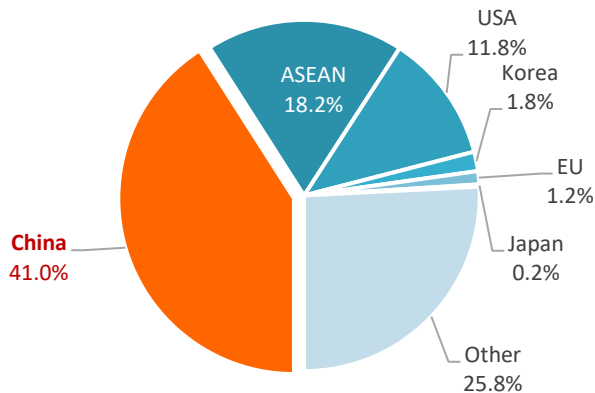
Increases **13.5%** compared to Aug-2025

Decreases **7.7%** compared to Sep-2024

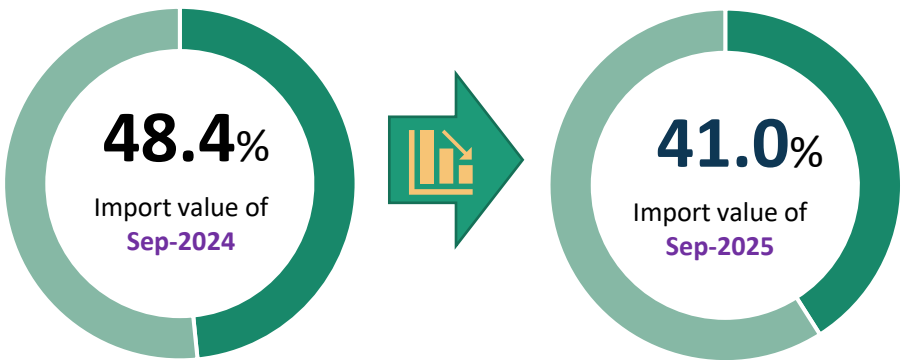
11.8 mil. USD more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **668.6 mil. USD**, **67.3%** of total 2024

Percentage of import value from China, Sep-2025



Changes in percentage of import value from China, Sep-2025

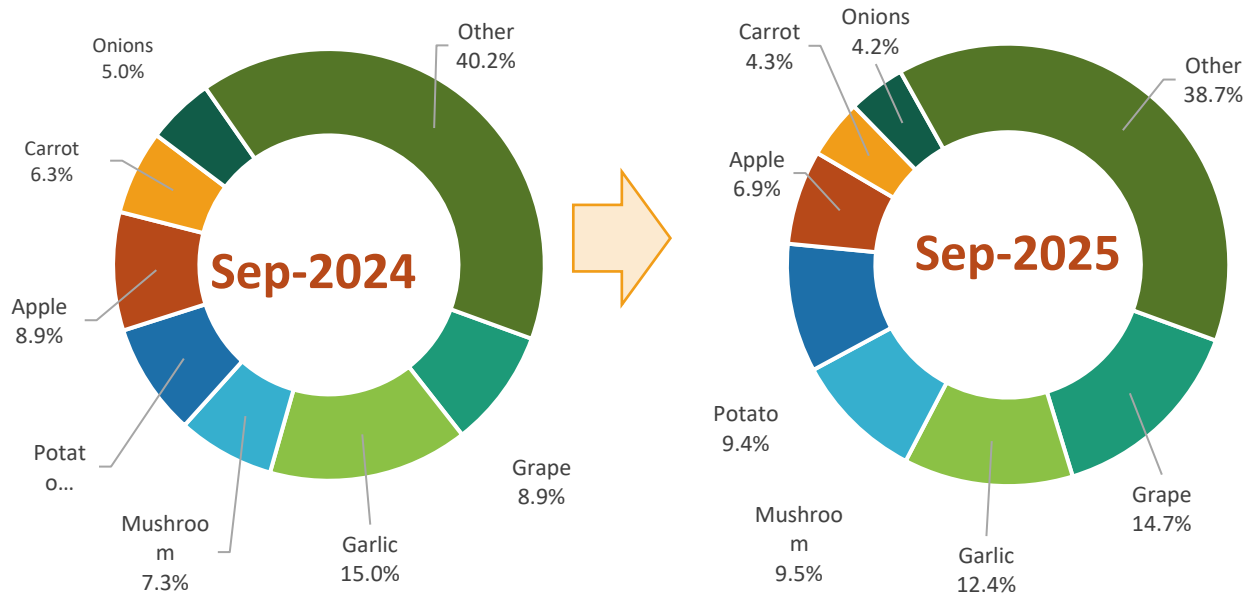




FRUITS & VEGETABLES (IMPORT)

Structure of imports by products from China, Sep-2025

Import results of some main products from China, Sep-2025



Grape
 Value: **13.9** mil. USD
 Increases **26.5%** compared to Aug-2025
 Increases **53.5%** compared to Sep-2024



Garlic
 Value: **11.7** mil. USD
 Decreases **4.6%** compared to Aug-2025
 Decreases **23.8%** compared to Sep-2024



Mushroom
 Value: **9.0** mil. USD
 Increases **11.1%** compared to Aug-2025
 Increases **20.4%** compared to Sep-2024



Potato
 Value: **8.9** mil. USD
 Increases **209.4%** compared to Aug-2025
 Increases **3.0%** compared to Sep-2024



Apple
 Value: **6.5** mil. USD
 Increases **18.2%** compared to Aug-2025
 Decreases **28.1%** compared to Sep-2024



Carrot
 Value: **4.1** mil. USD
 Increases **27.9%** compared to Aug-2025
 Decreases **37.3%** compared to Sep-2024



Onions
 Value: **4.0** mil. USD
 Increases **6.3%** compared to Aug-2025
 Decreases **23.6%** compared to Sep-2024

Source: Calculated from data of the Department of Customs



China spends over USD 1 billion on importing Vietnamese fruits and vegetables in September

Vietnam's fruit and vegetable exports to China continued to grow strongly, reaching nearly USD 1.1 billion in September, up 50% year-on-year compared to the same period in 2024. Over the first nine months of 2025, China spends more than USD 3.8 billion on importing Vietnamese fruits and vegetables — an increase of 2% from 2024 — accounting for nearly 60% of the sector's total export value.

The main growth driver is durian, with estimated revenue at USD 2.5–2.6 billion in the nine-month period, representing more than half of Vietnam's fruit and vegetable export value to China. Alongside bananas, mangoes, jackfruit, coconuts and processed products continues to serve as the pillar of the sector's growth.

Beyond fresh fruit, an increasing number of frozen and processed Vietnamese products have been granted import approval by China, helping export turnover continue to rise in the final months of the year. According to the Vietnam Fruit and Vegetable Association (Vinafruit), exports to China alone could reach USD 5.5 billion this year, far exceeding the USD 4.63 billion recorded in 2024.

Source: Vnexpress.net



Nearly 2,000 durian containers stuck temporary suspension of testing

In the second half of October, around 2,000 containers of durians from Đắk Lắk were stuck at border gates and storage facilities after testing laboratories temporarily suspended checks for two mandatory export criteria — Cadmium (Cd) and Auramine O — required for shipments to China.

The suspension of sample intake and delays in test results prevented exporters from obtaining the necessary food safety certificates, forcing them to halt purchases during the peak harvest season. As a result, the supply chain was disrupted, leaving thousands tons of ripe durians unsold; many batches stored for 10–15 days faced risks of spoilage, cracked shells, and quality deterioration.

On the afternoon of October 24, the Ministry of Agriculture and Environment held an emergency meeting with testing laboratories to resolve the issue. Later that evening, some labs resumed issuing test results for the backlogged shipments, allowing for initial clearance of the delayed containers. However, new sample processing remains unstable, and exporters are still waiting for detailed guidance from the authorities.

Source: Vnexpress.net

FRUITS & VEGETABLES

SPOTLIGHTS



China opens market for five types of stone fruits from South Africa

China signed a protocol agreement with South Africa, allowing to import five types of stone fruits from South Africa, including apricots, peaches, nectarines, fresh plums, and dried plums. This marks the first time that China opened market to multiple stone fruit varieties from a single country. The two nations also discussed logistics and export facilitation, with a focus on Chinese investment in South Africa's transport and port infrastructure, linked to the Belt and Road Initiative. Both sides committed to strengthening agricultural trade relations and expanding cooperation in the fruit sector.

Source: Freshplaza.com

China is preparing to open market to hazelnuts and almonds from Azerbaijan

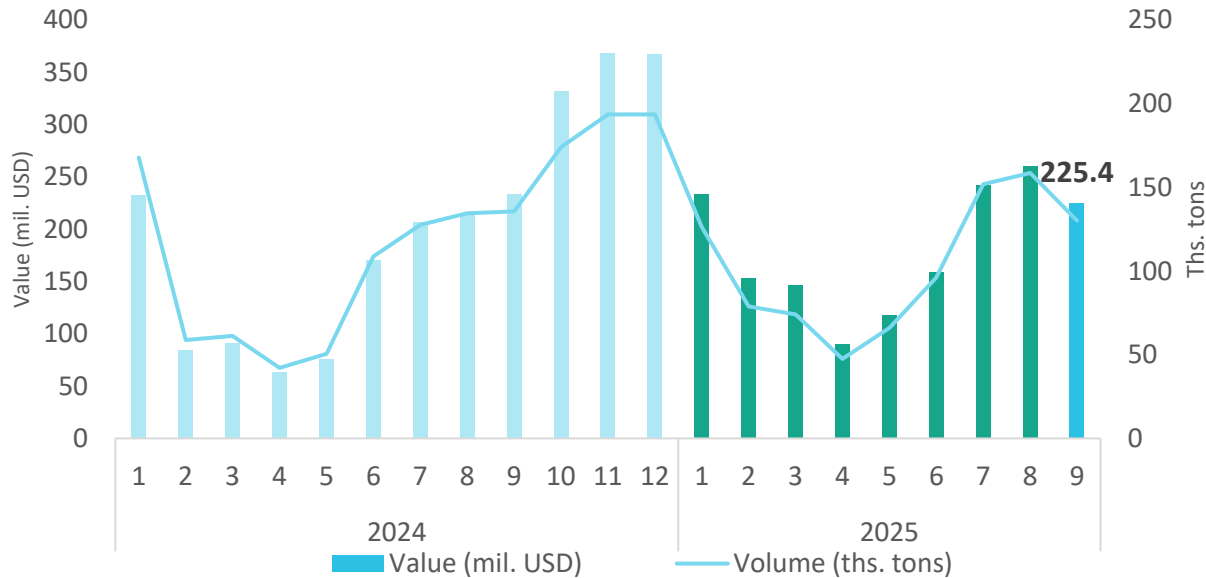
The General Administration of Customs of China (GACC) and the Azerbaijan Food Safety Agency (AQTA) have signed a draft protocol on quarantine, inspection, and hygiene requirements for the export of hazelnuts and almonds from Azerbaijan to China. In addition, both sides signed a draft document establishing a cooperation mechanism in the field of food safety related to import and export activities, and discussed expanding export opportunities for other Azerbaijani products such as cherries, apples, persimmons, and pomegranates.

Source: Guojiguoshu.com

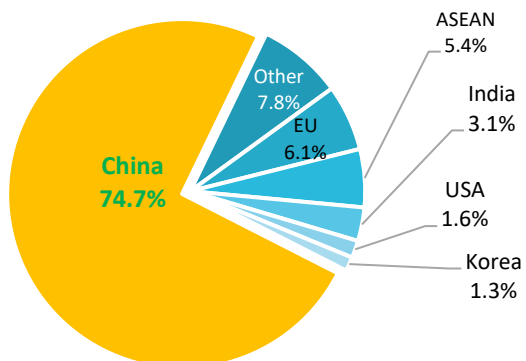


RUBBER

Export volume and value to China, Sep-2025



Percentage of export value to China, Sep-2025



Export results to China, Sep-2025

VALUE
225.4 *mil. USD*

Decreases **13.4%** compared to Aug-2025

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

Increases **21 mil. USD** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **1.63 bil. USD**, **66.6%** of total 2024

VOLUME
130.2 *ths. tons*

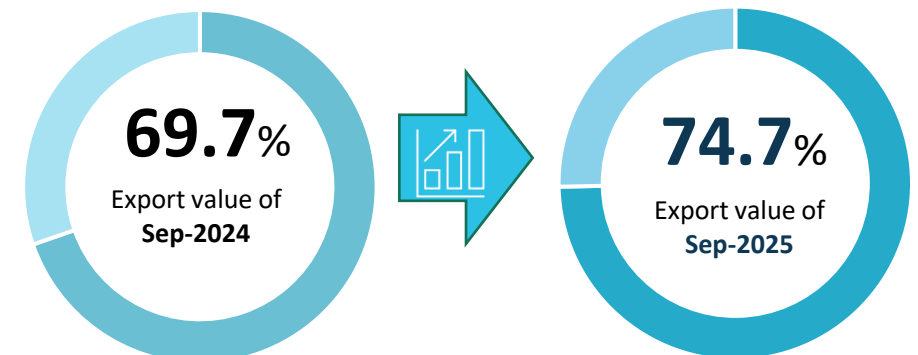
Decreases **17.9%** compared to Aug-2025

Decreases **4.0%** compared to Sep-2024

Increases **9.5 ths. tons** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **930 ths. tons**, **64.2%** of total 2024

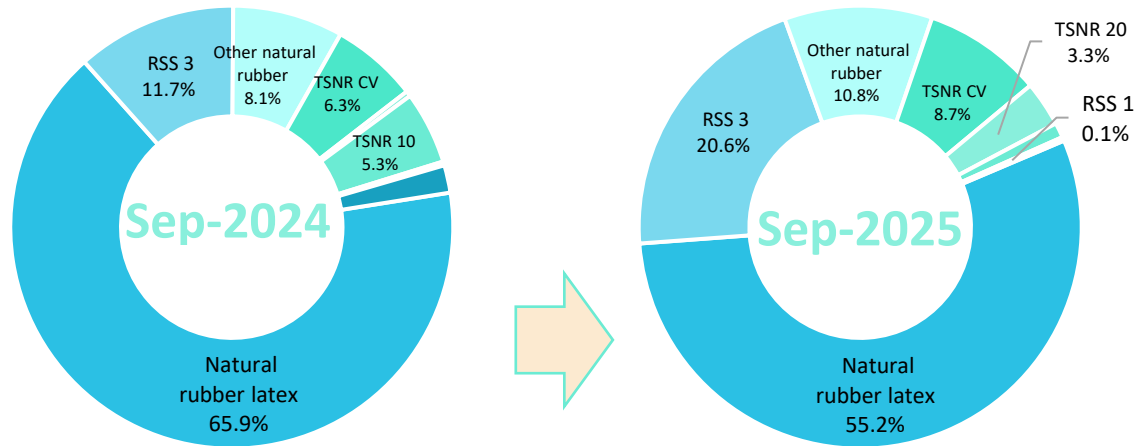
Changes in percentage of export value to China, Sep-2025



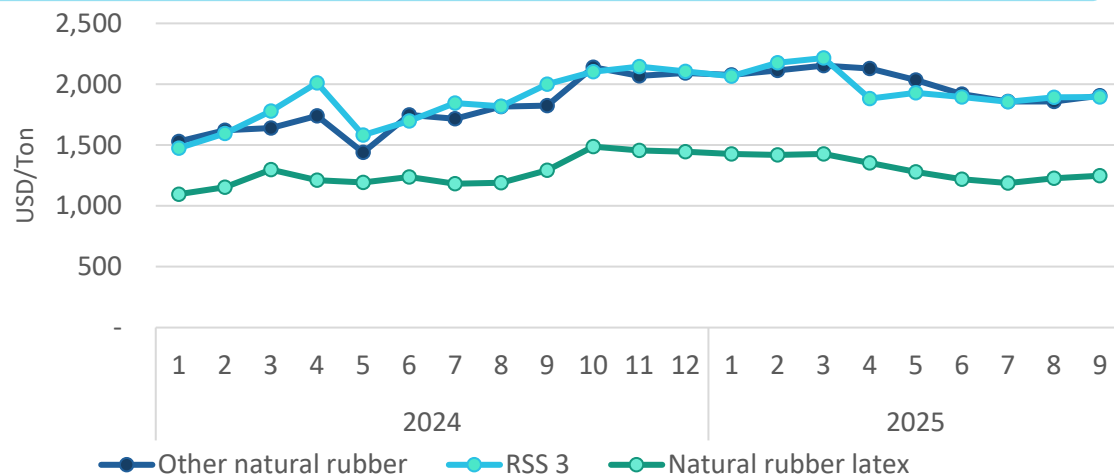


RUBBER

Structure of exports by products to China, Sep-2025



Average export price to China, Sep-2025



Export results to China, Sep-2025



Natural rubber latex

Value: **124.4** mil. USD

Decreases **32.2%** compared to Aug-2025

Decreases **19.3%** compared to Sep-2024



RSS 3

Value: **46.5** mil. USD

Increases **80%** compared to Aug-2025

Increases **70.1%** compared to Sep-2024



Other natural rubber

Value: **24.4** mil. USD

Increases **16.4%** compared to Aug-2025

Increases **29%** compared to Sep-2024

Natural rubber latex

The average export price in Sep-2025 is **1,249** USD/ton; **increases 1.7%** compared to the previous month; and **decreases 3.4%** compared to the same month of 2024

RSS 3

The average export price in Sep-2025 is **1,894** USD/ton; **increases 0.1%** compared to the previous month; and **decreases 5.3%** compared to the same month of 2024

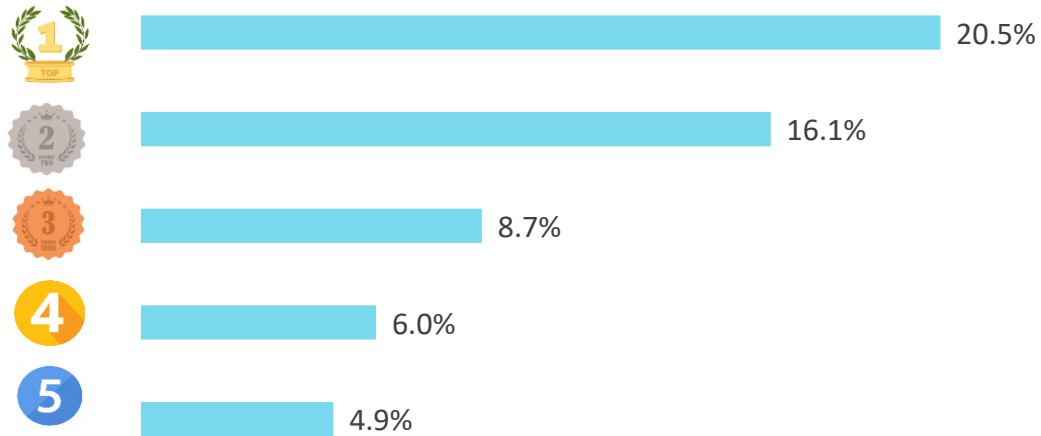
Other natural rubber

The average export price in Sep-2025 is **1,906** USD/ton; **increases 2.6%** compared to the previous month; and **increases 4.5%** compared to the same month of 2024

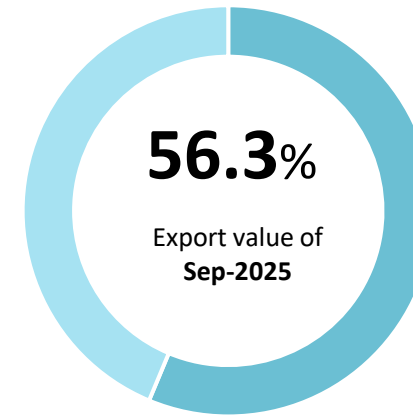


RUBBER

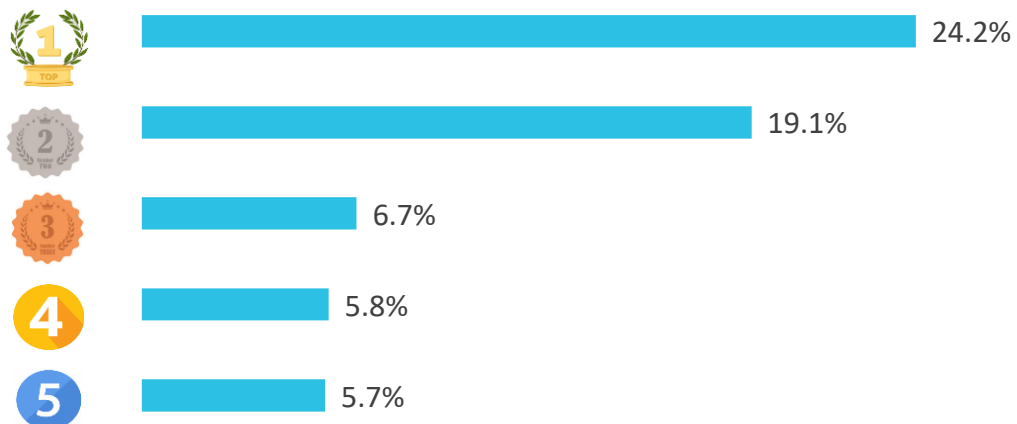
TOP 5 export enterprises by value to China, Sep-2025



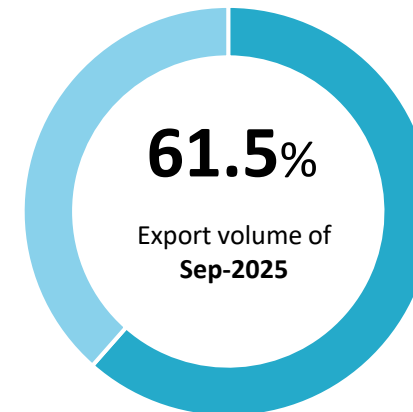
Value ratio of TOP 5 export enterprises to China, Sep-2025



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



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





RUBBER

SPOTLIGHTS

❖ Vietnam's rubber exports to China increased over the first nine months

In the first nine months of 2025, Vietnam's rubber exports to China reached 925,965 tons, valued at USD 1.62 billion, up 4.3% in volume and 17.9% in value compared to the same period in 2024. China remains the Vietnam's largest market, accounting for 71.7% of the country's total rubber exports, higher than 67.4% in the same period last year. The growth was mainly driven by strong demand for rubber used in tire manufacturing, amid the rapid expansion of China's electric vehicle industry. However, Vietnam's market share in China's total rubber imports declined from 15.4% to 13.7% during the same period. According to the Import-Export Department (Ministry of Industry and Trade), although China's rubber import demand remains high, the global decline in rubber prices—which have fallen to their lowest levels in months—could negatively affect Vietnam's export revenue in the final months of 2025.

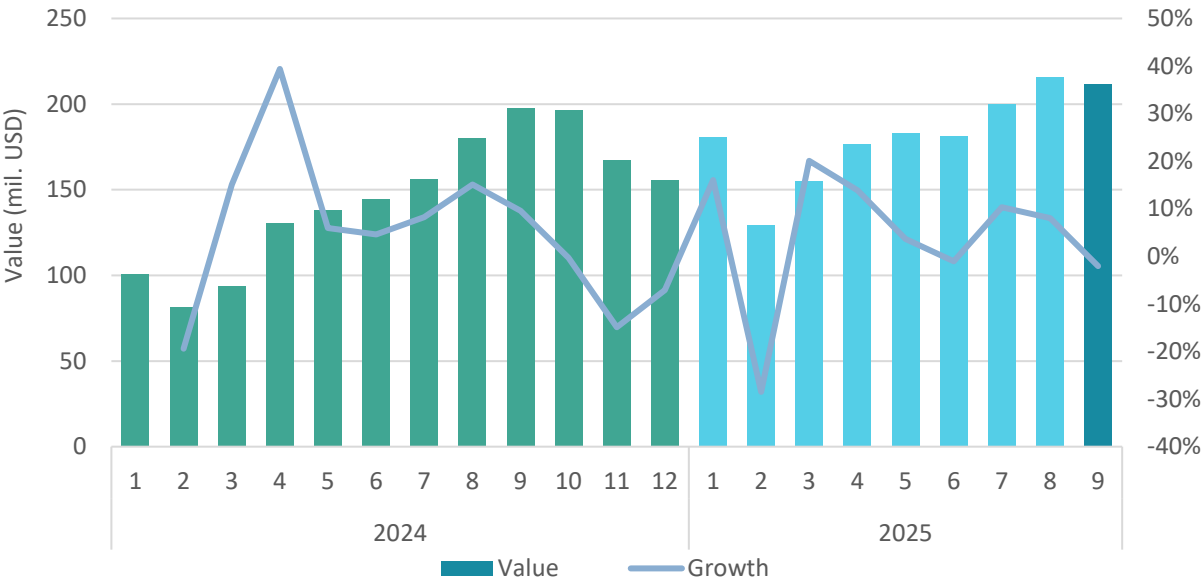
Source: Doannghieptiepthi.vn





FISHERIES

Export volume and value to China, Sep-2025



Export results to China, Sep-2025

VALUE

211.4 mil. USD

Decreases **2.1%** compared to Aug-2025

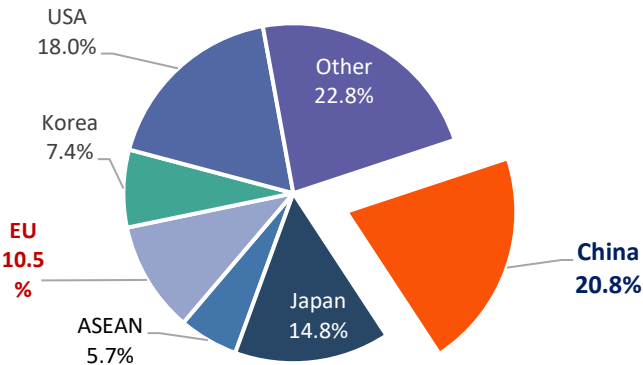
Increases **7.1%** compared to Sep-2024

66.2 mil. USD more than the monthly average rate in 2024

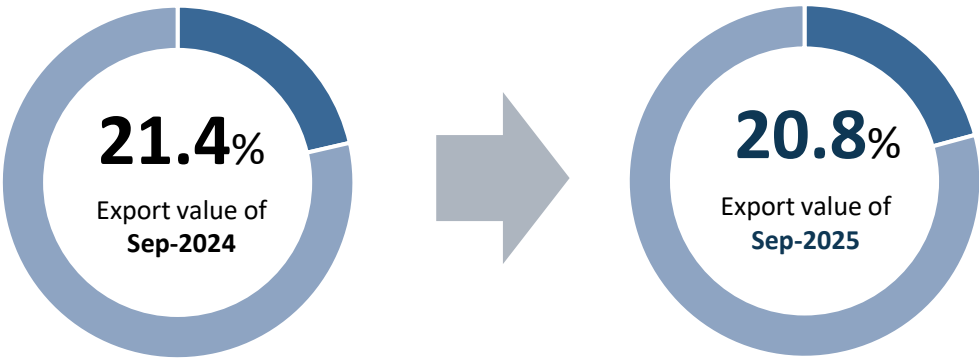
Accumulated 9 months of 2025 reaches **1632.3** mil. USD, **93.7%** of total 2024

\$

Percentage of export value to China, Sep-2025



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

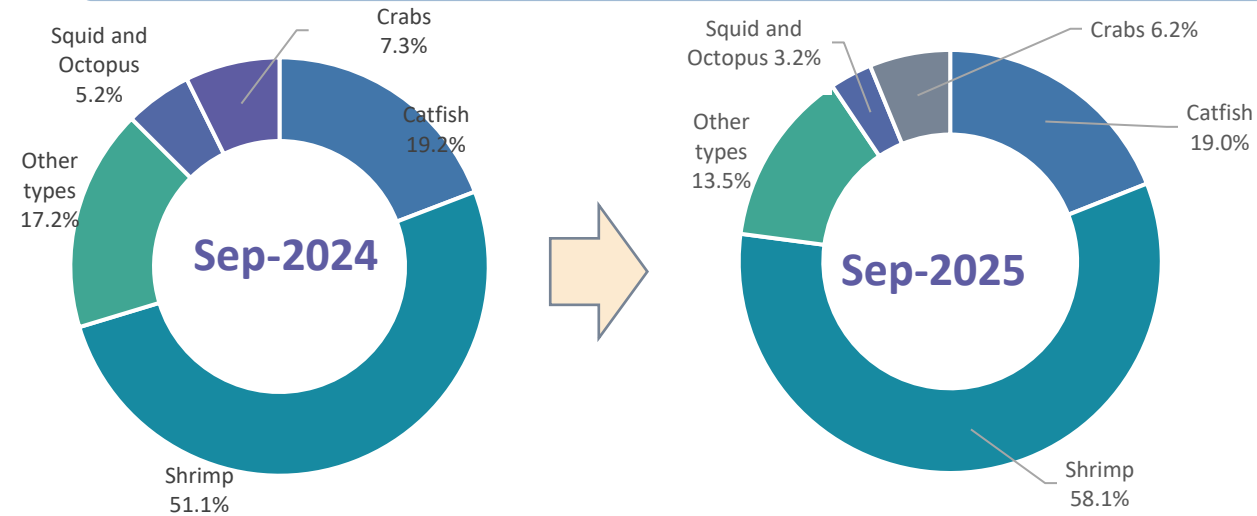


Source: Calculated from data of the Department of Customs

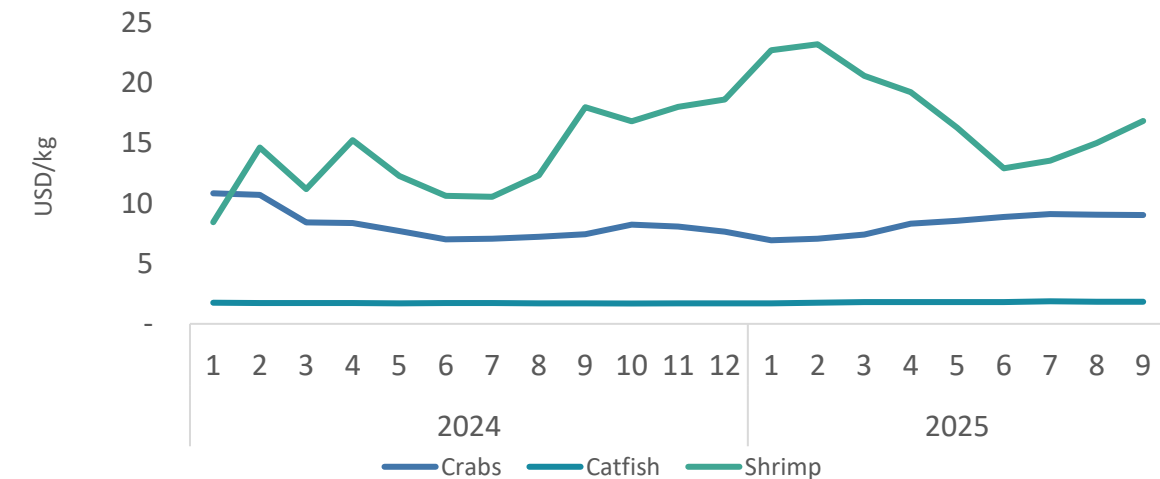


FISHERIES

Structure of exports by products to China, Sep-2025



Average export seafood price to China, Sep-2025



Seafood exports to China, Sep-2025



Catfish

Value: **40.2** mil. USD

Decreases **7.1%** compared to Aug-2025

Increases **6.1%** compared to Sep-2024



Shrimp

Value: **122.8** mil. USD

Increases **6.6%** compared to Aug-2025

Increases **21.7%** compared to Sep-2024



Crabs

Value: **13.1** mil. USD

Increases **3.2%** compared to Aug-2025

Decreases **9.4%** compared to Sep-2024

Crabs

The average export price in Sep-2025 is **9.0 USD/kg**; decreases **0.1%** compared to the previous month; and increases **21.4%** compared to the same month of 2024

Catfish

The average export price in Sep-2025 is **1.8 USD/kg**; decreases **0.5%** compared to the previous month; and increases **7.0%** compared to the same month of 2024

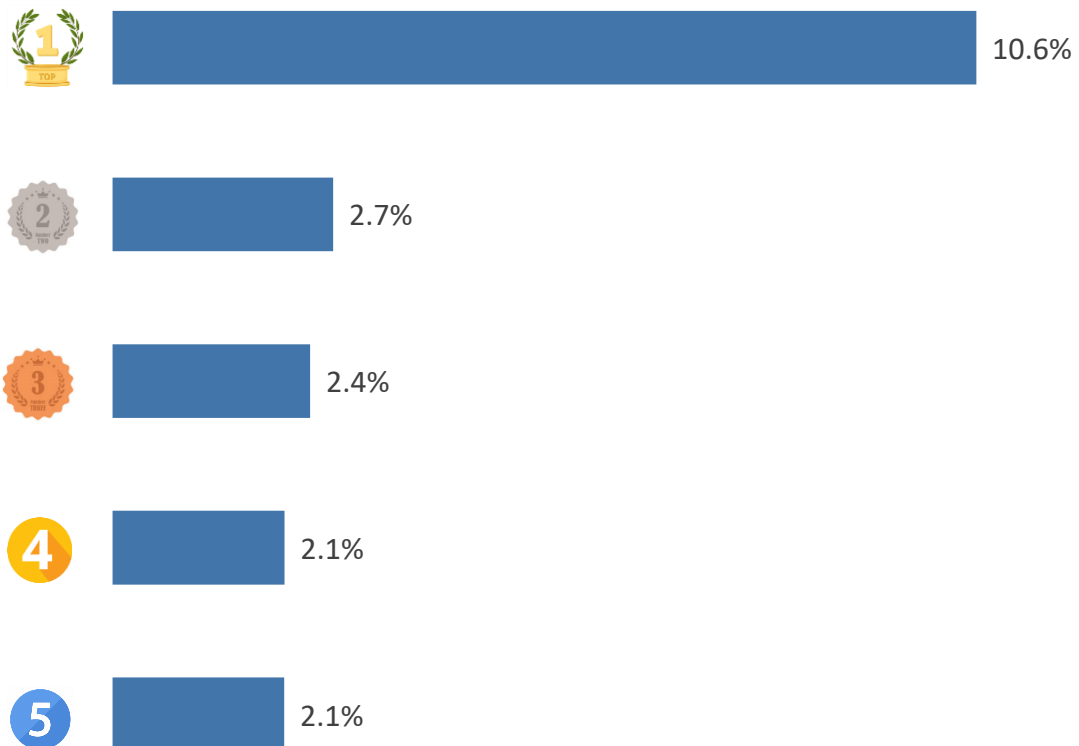
Shrimp

The average export price in Sep-2025 is **16.8 USD/kg**; increases **12.1%** compared to the previous month; and decreases **6.4%** compared to the same month of 2024

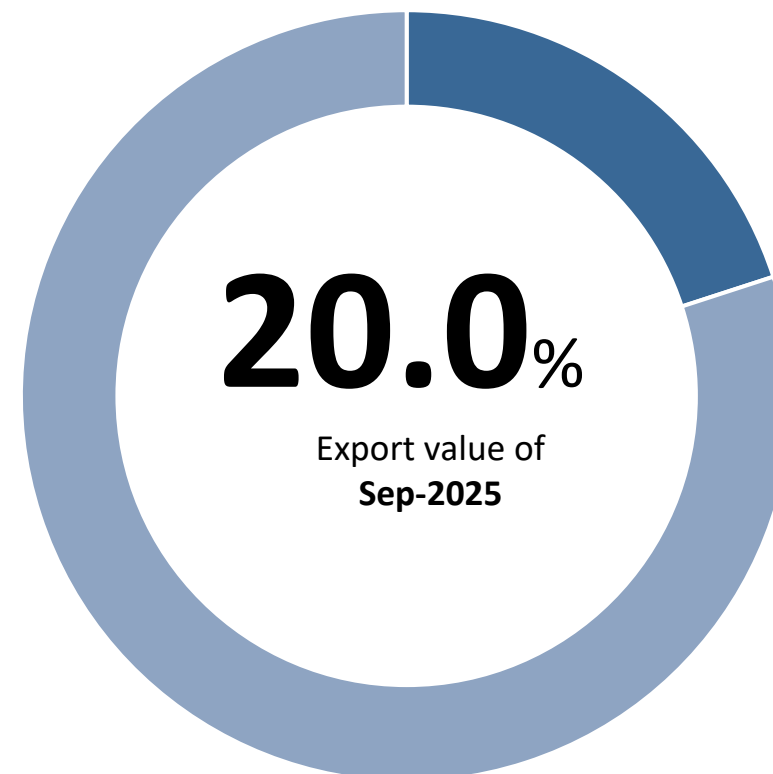


FISHERIES

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



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



China's whitefish processing industry faces difficulties due to rising raw material costs and trade instability

China's whitefish processing industry is facing a challenging business environment as raw material prices surge and trade tensions with the United States show no signs of easing. Prices of cod, black cod, and pollock have risen sharply, while unstable tariffs have forced many factories to cut production by 20–50% and shift their focus to the domestic market.

According to the Norwegian Seafood Council (NSC), Norway's reduced fishing quotas and progressive U.S. tariff increases since March 2025 have driven raw material prices to record highs, significantly reducing cod export volumes to China. This has disrupted the traditional processing and re-export supply chain to the U.S., which had been a dominant model for years.

By the end of September, imports of frozen whole cod from Norway to China had dropped sharply, adding cost pressure and raising the risk of losing export orders. In the coming months, China's whitefish processors are expected to continue facing reduced capacity, shrinking profit margins, and need to diversify markets to sustain operations.

Source: Vasep



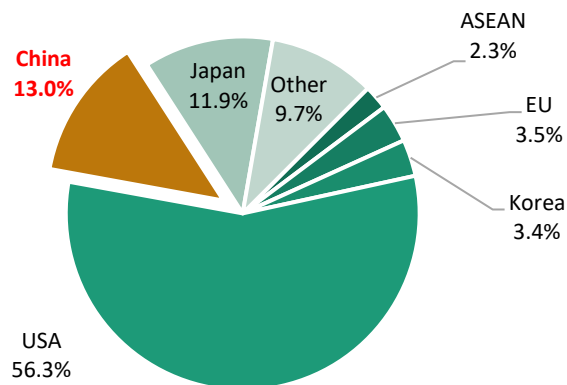


WOOD & WOODEN PRODUCTS

Export volume and value to China, Sep-2025



Percentage of export value to China, Sep-2025



Export results to China, Sep-2025



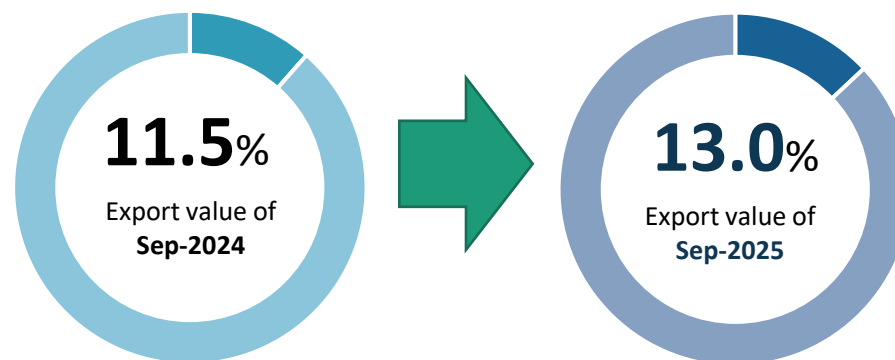
Decreases **3.8%** compared to Aug-2025

Increases **23.2%** compared to Sep-2024

↑ **9.4 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **1.4 bil. USD, 69.7%** of total 2024

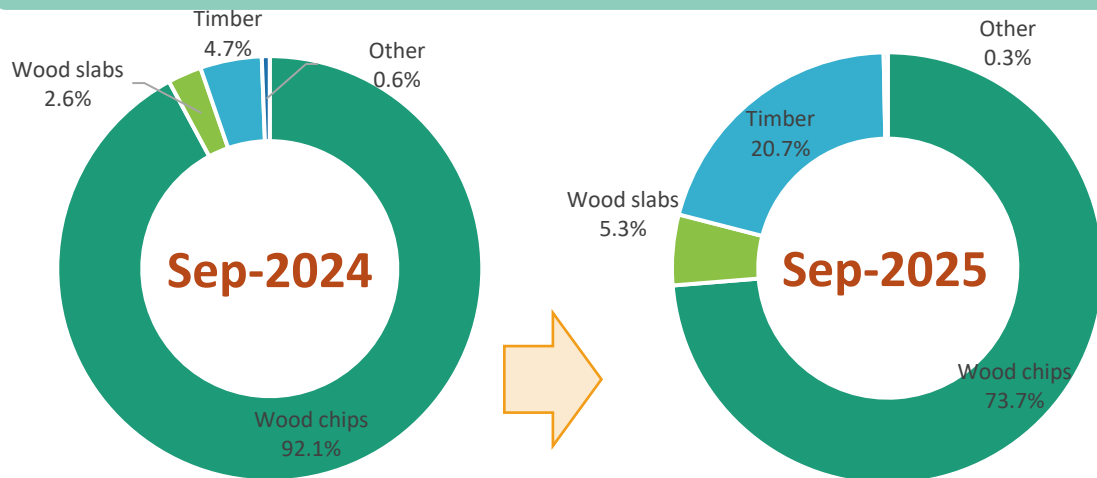
Changes in percentage of export value to China, Sep-2025



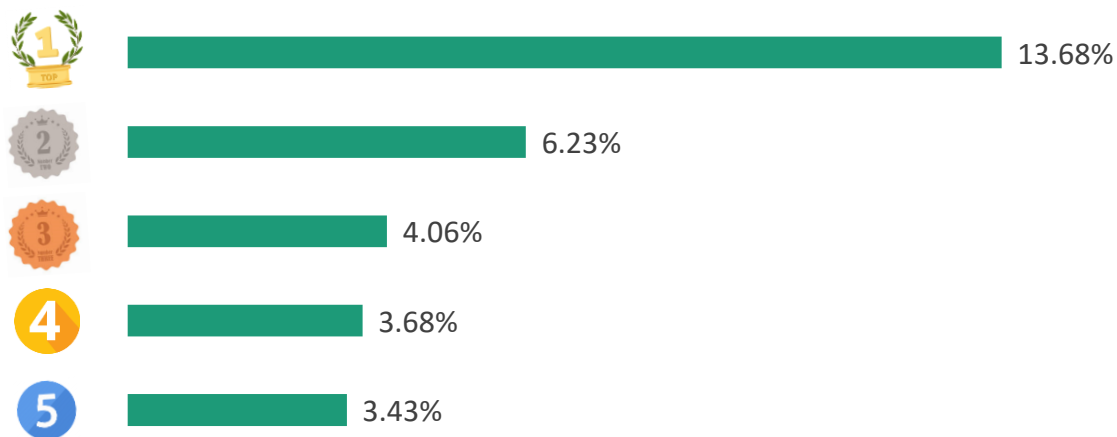


WOOD & WOODEN PRODUCTS

Structure of exports by products to China, Sep-2025



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



Export results to China, Sep-2025



Wood Teaips

Value: **138.7** mil. USD

Increases **5%** compared to Aug-2025

Decreases **18%** compared to Sep-2024



Timber

Value: **30.8** mil. USD

Increases **6%** compared to Aug-2025

Increases **319%** compared to Sep-2024



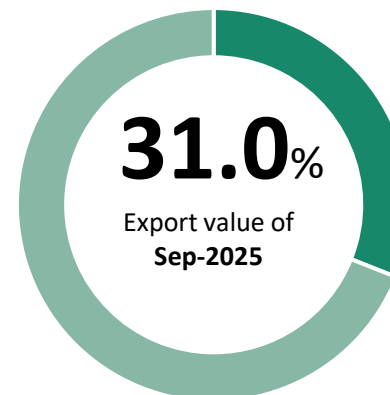
Wood slabs

Value: **7.0** mil. USD

Giảm **14%** compared to Aug-2025

Increases **55%** compared to Sep-2024

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





SPOTLIGHTS

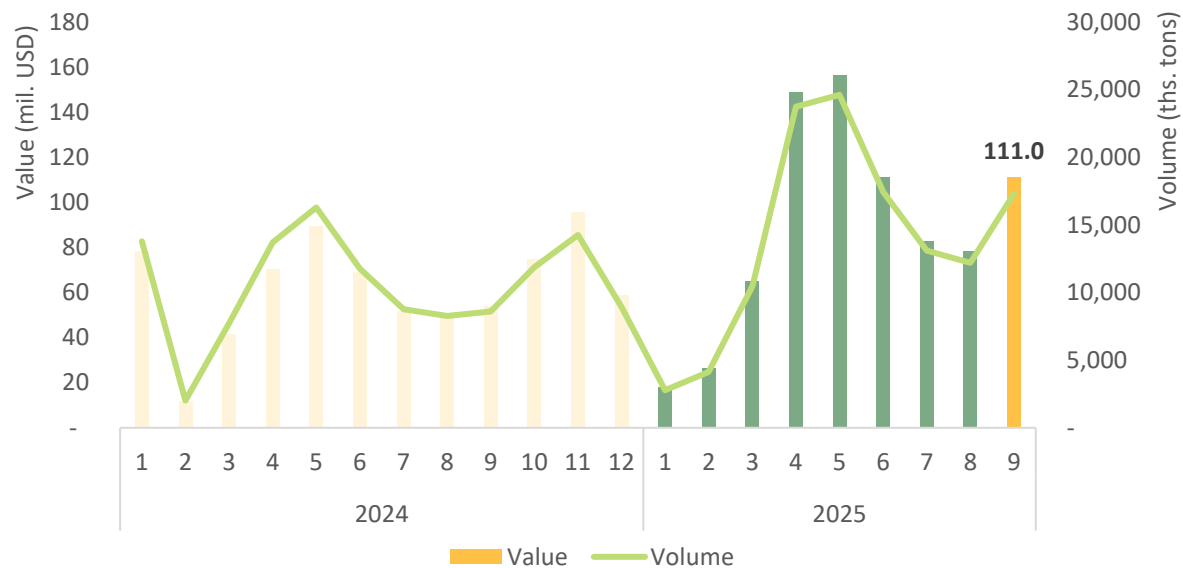
According to the summary of the implementation phase of China's 15th Five-Year Plan, the country's wood-based panel industry become one of the world's largest centers for the production, consumption, and trade of wood and bamboo products, with panel output reaching 349 million cubic meters in 2024. However, the industry faces a major challenge of excess production capacity, particularly in the particleboard segment, requiring structural adjustments and improvements in product quality.

Recent indicators show early signs of recovery in the sector. Specifically, the Global Timber Index – China (GTI-China) rose to 51.7% in September 2025, returning to the expansion zone after a month of decline. This rebound coincides with the government's release of the "Work Plan for Stabilizing Growth in the Building Materials Industry (2025/26)", which introduces stimulus measures such as promoting the use of green building materials in rural areas, aiming to generate over 300 billion CNY (approximately USD 42.1 billion) in revenue by 2026.



CASHEW NUTS

Export value and volume to China, Sep-2025



Export results to China, Sep-2025

VALUE
111 mil. USD

↗ Increases **41.3%** compared to Aug-2025

↗ Increases **105.6%** compared to Sep-2024

↑ **49 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **798 mil. USD, 107%** of total 2024

VOLUME
17.3 ths. tons

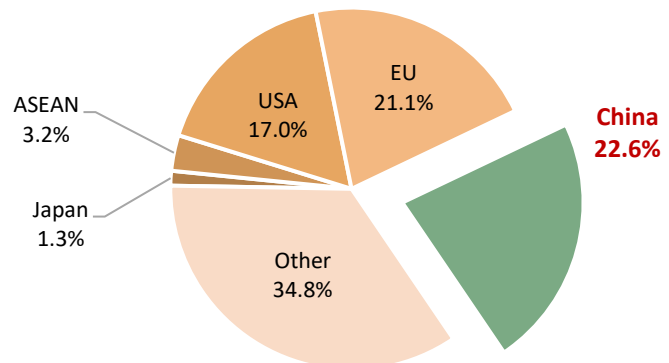
↗ Increases **41.7%** compared to Aug-2025

↗ Increases **101.2%** compared to Sep-2024

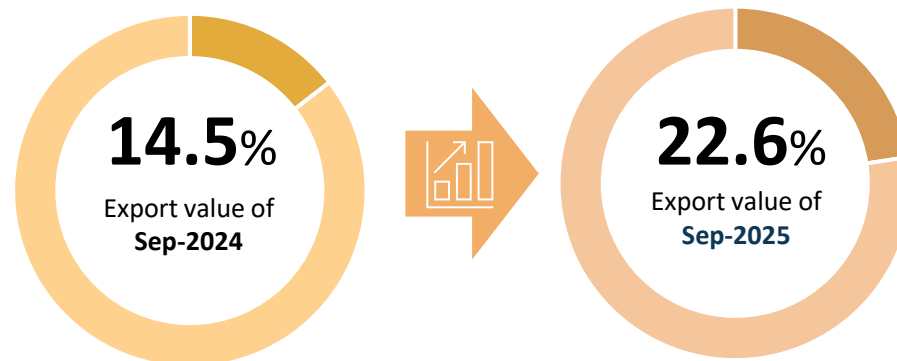
↑ **6.8 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **126 ths. tons, 100%** of total 2024

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



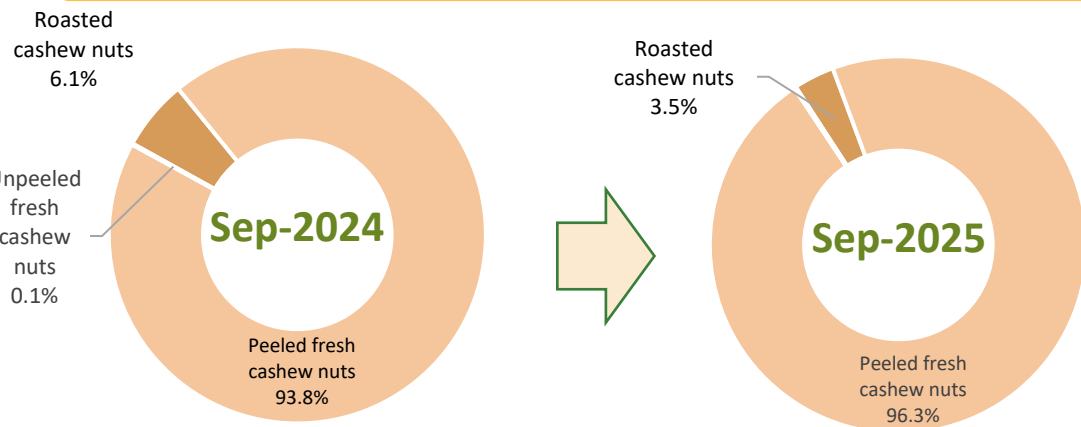
Changes in percentage of export value to China. Nov-2023



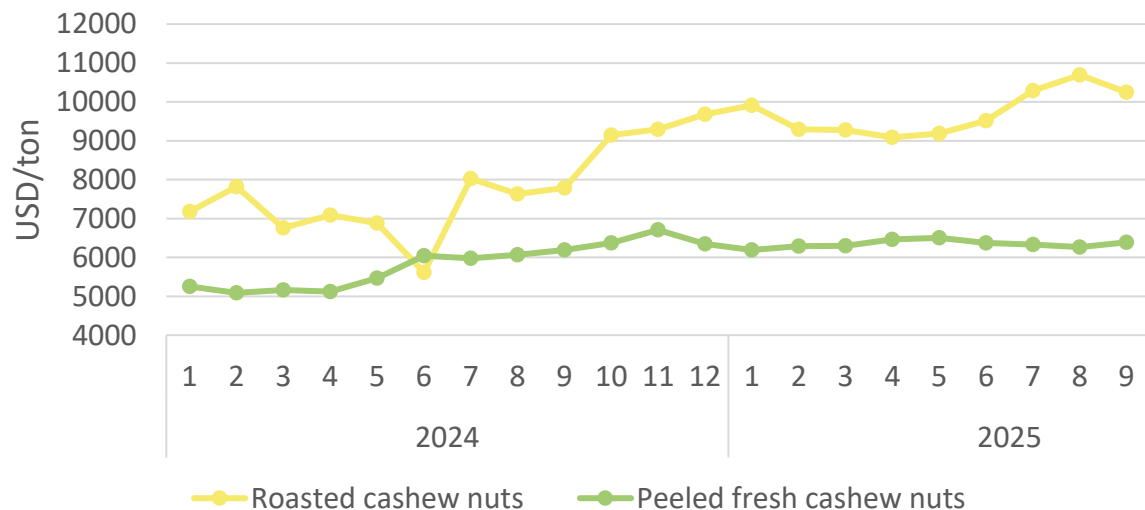


CASHEW NUTS

Structure of exports by products to China, Sep-2025



Average export cashew nuts price to China, Sep-2025



Export results to China, Sep-2025



Peeled fresh cashew nuts

Value: **107** mil. USD

Increases **49%** compared to Aug-2025

Increases **111%** compared to Sep-2024



Roasted cashew nuts

Value: **3.9** mil. USD

Decreases **5.1%** compared to Aug-2025

Increases **19%** compared to Sep-2024

Peeled fresh cashew nuts

The average export price in Sep-2025 is **6,389** USD/ton; **increases 2.1%** compared to the previous month; and **increases 3.3%** compared to the same month of 2024

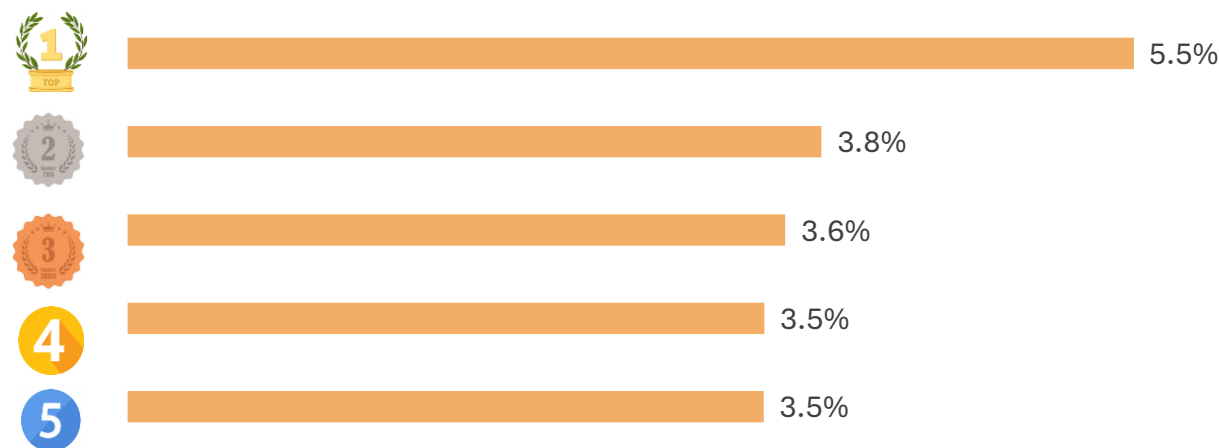
Roasted cashew nuts

The average export price in Sep-2025 is **10,245** USD/ton; **decreases 4.2%** compared to the previous month; and **increases 31.5%** compared to the same month of 2024



CASHEW NUTS

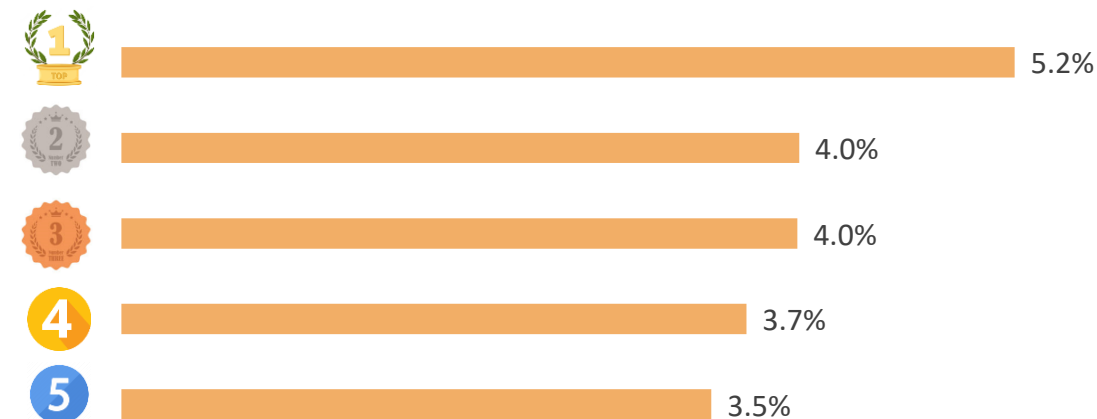
TOP 5 export enterprises by value to China, Sep-2025



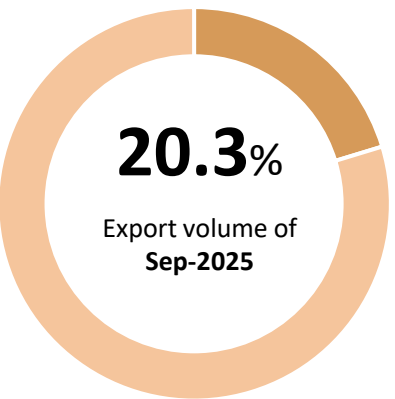
Value ratio of TOP 5 export enterprises to China, Sep-2025



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



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



Source: Calculated from data of the Department of Customs

CASHEW NUTS



SPOTLIGHTS

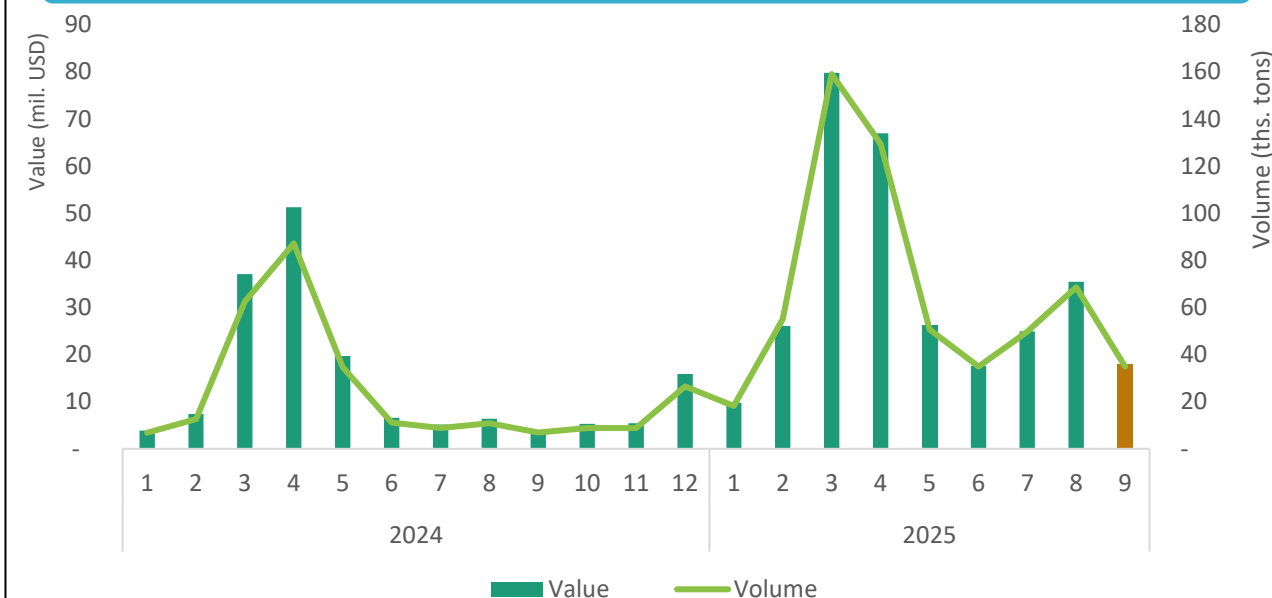
The Chinese market continues to be a major bright spot for Vietnam's cashew sector this year. In the first nine months of 2025, exports to China reached 125,690 tons, worth USD 797.42 million, marking sharp increases of 54.1% in value and 37.4% in volume compared to the same period last year. Exporting companies report a rapid rise in orders, particularly from China, while many Chinese importers note that domestic cashew consumption has surged by as much as 80% year-on-year.

According to the Vietnam Cashew Association (VINACAS), the fourth quarter of each year is traditionally the "golden season" for the cashew industry, as consumption demand in major markets like China rises sharply to serve the year-end festive season, including Christmas, New Year, and Lunar New Year celebrations.



RICE

Export volume and value to China, Sep-2025



Export results to China, Sep-2025

VALUE
17.8 mil. USD \$

Decreases **49.6%** compared to Aug-2025

Increases **344.6%** compared to Sep-2024

Increases **3.9 mil. USD** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **304.7 mil. USD, 181.4%** of total 2024

VOLUME
34.9 ths. tons

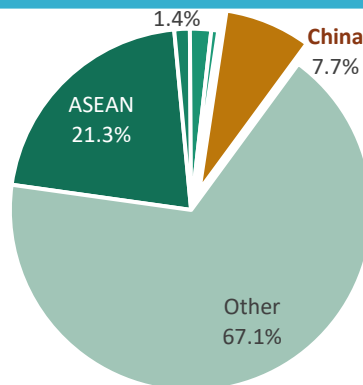
Decreases **49.2%** compared to Aug-2025

Increases **405.5%** compared to Sep-2024

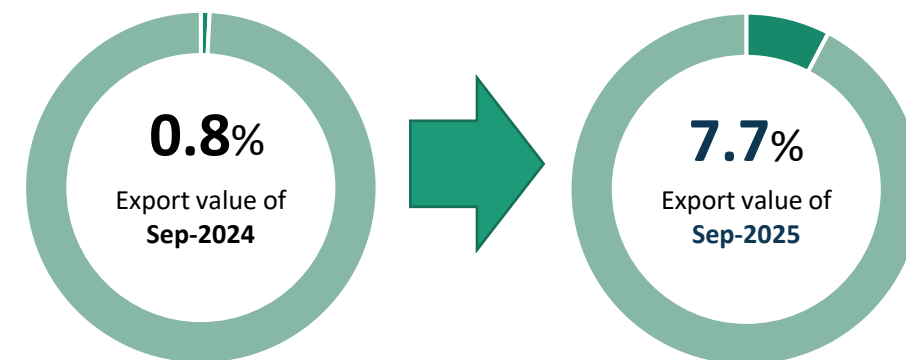
Increases **11.1 ths. tons** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **600.2 ths. tons, 210.2%** of total 2024

Percentage of export value to China, Sep-2025



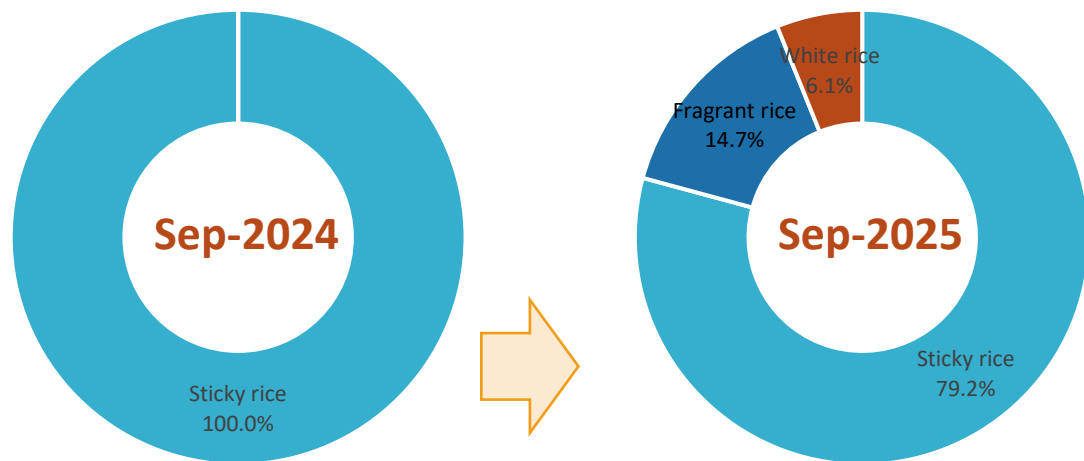
Changes in percentage of export value to China, Sep-2025



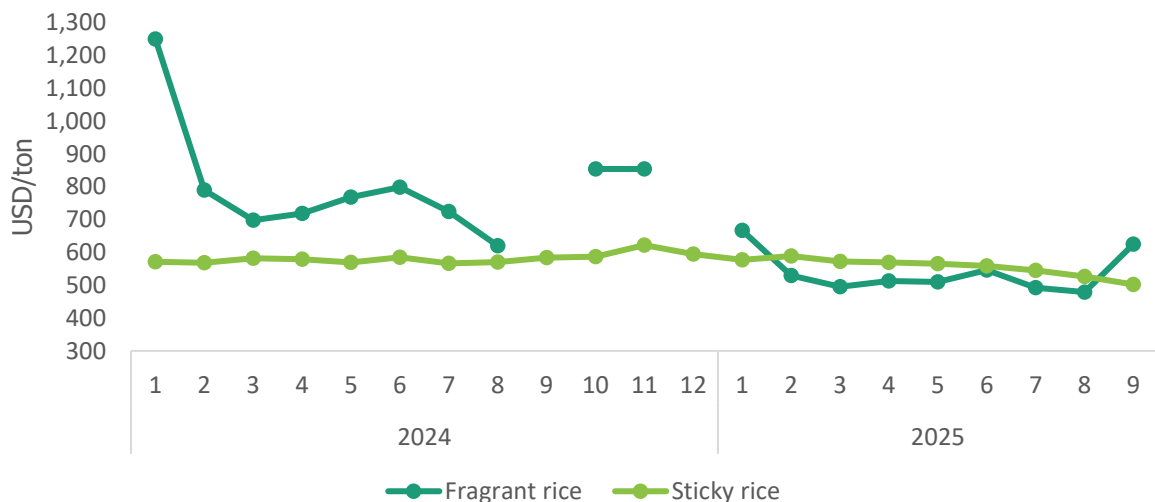


RICE

Structure of exports by products to China, Sep-2025



Average export rice price to China, Sep-2025



Export results to China, Sep-2025



Sticky rice

Value: **14.1** mil. USD

Decreases **54%** với T08/2025

Increases **251%** compared to Sep-2024



Fragrant rice

Value: **2.6** mil. USD

Increases **11%** compared to Aug-2025

Increases N/A compared to Sep-2024



White rice

Value: **2.7** mil. USD

Decreases **60%** compared to Aug-2025

Increases N/A compared to Sep-2024

Sticky rice

The average export price in Sep-2025 is **502** USD/ton; **decreases 5%** compared to the previous month; and **increases 30%** compared to the same month of 2024

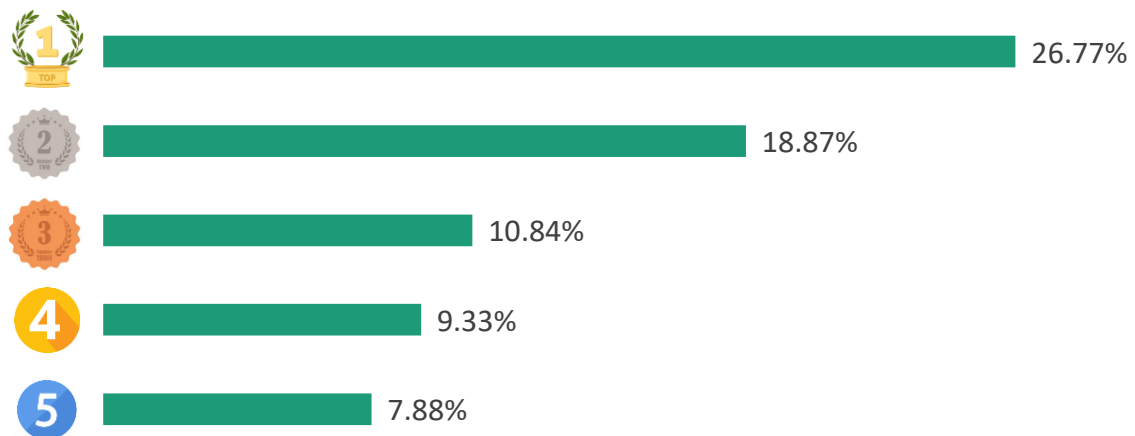
Fragrant rice

The average export price in Sep-2025 is **624** USD/ton; **decreases 14%** compared to the previous month

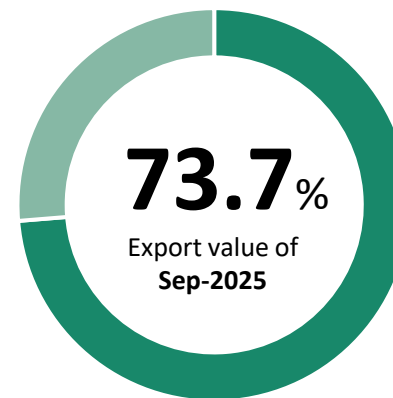


RICE

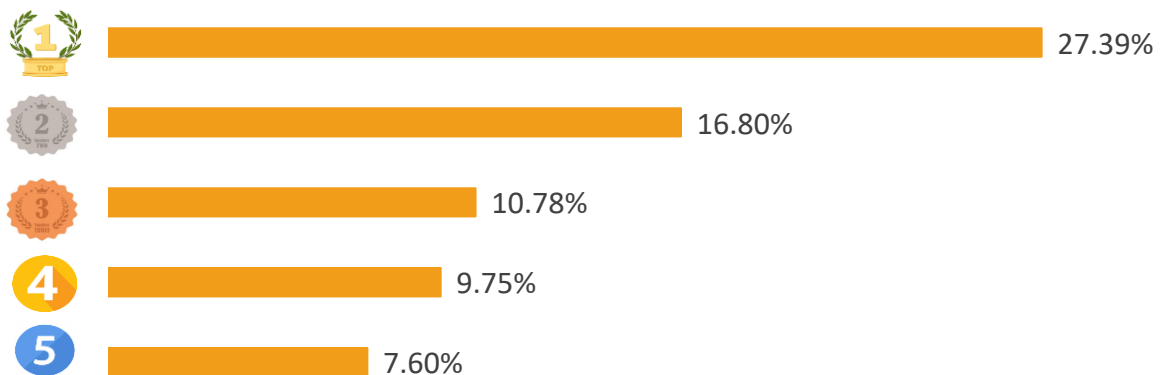
TOP 5 export enterprises by value to China, Sep-2025



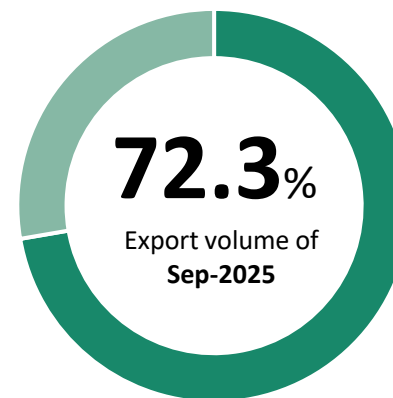
Value ratio of TOP 5 export enterprises to China, Sep-2025



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



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





RICE



SPOTLIGHTS

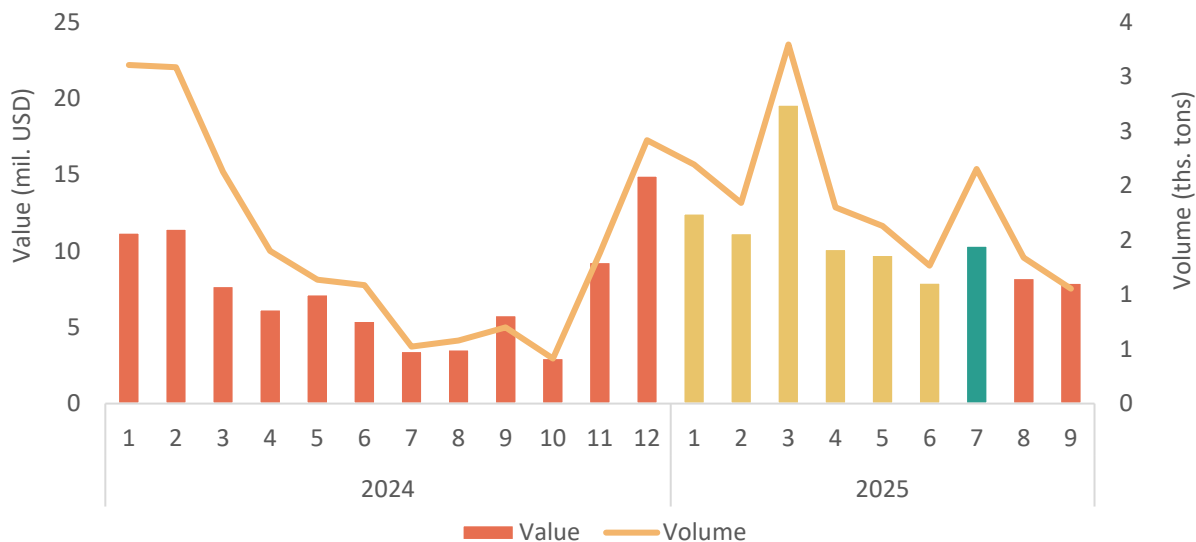
In October 2025, China's rice import demand rose sharply — particularly from Pakistan — helping to stabilize prices amid global oversupply. According to S&P Global Commodity Insights, Chinese importers purchased large volumes of 100% broken white rice and 5% broken rice from Pakistan at prices of USD 305 per ton and USD 345–350 per ton, respectively, with delivery expected in November 2025. The price of Pakistan 5% broken rice was USD 347 per ton, up USD 3 from the previous week, reflecting strong Chinese demand, which helped slow the regional price decline in South Asia.

During the first half of fiscal year 2025/2026, China imported 594,904 tons of rice and broken rice from Myanmar, according to the Myanmar Rice Federation (MRF). The price of Myanmar 5% white rice currently stands at USD 320 per ton FOB FCL, up USD 6 per ton from the previous week. Overall, steady Chinese purchasing is viewed as a key factor stabilizing rice prices in the region, despite global oversupply pressures and weak international demand.

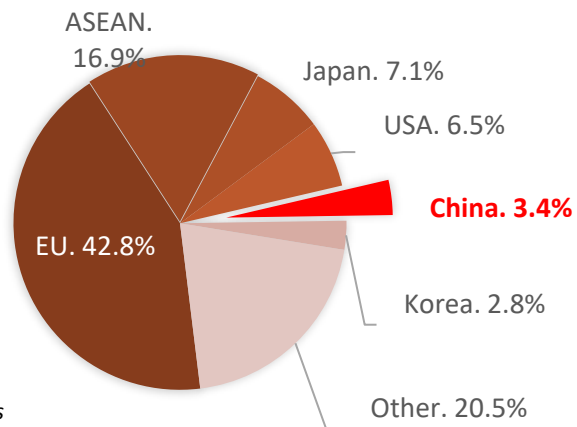


COFFEE

Export volume and value to China, Sep-2025



Percentage of export value to China, Sep-2025



Source: Calculated from data of the Department of Customs

Export results to China, Sep-2025

VALUE
7.9 mil. USD

⬇ Decreases **3.8%** compared to Aug-2025

⬆ Increases **36.5%** compared to Sep-2024

⬆ **0.5 mil. USD** more than the monthly average rate in 2024.

❖ Accumulated 9 months of 2025 reaches **97.4** mil. USD, **109.4%** of total 2024.

VOLUME
1.1 ths. tons

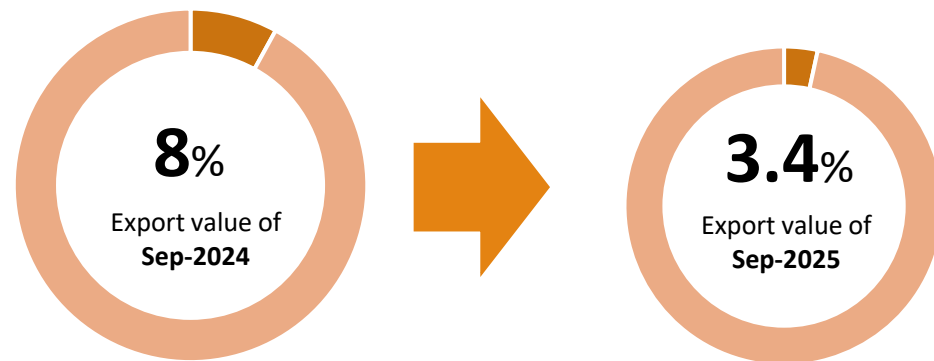
⬇ Decreases **21.2%** compared to Aug-2025

⬆ Increases **50.9%** compared to Sep-2024

⬇ **0.4 ths. tons** less than the monthly average rate in 2024.

❖ Accumulated 9 months of 2025 reaches **16.6** ths. tons, **92.3%** of total 2024.

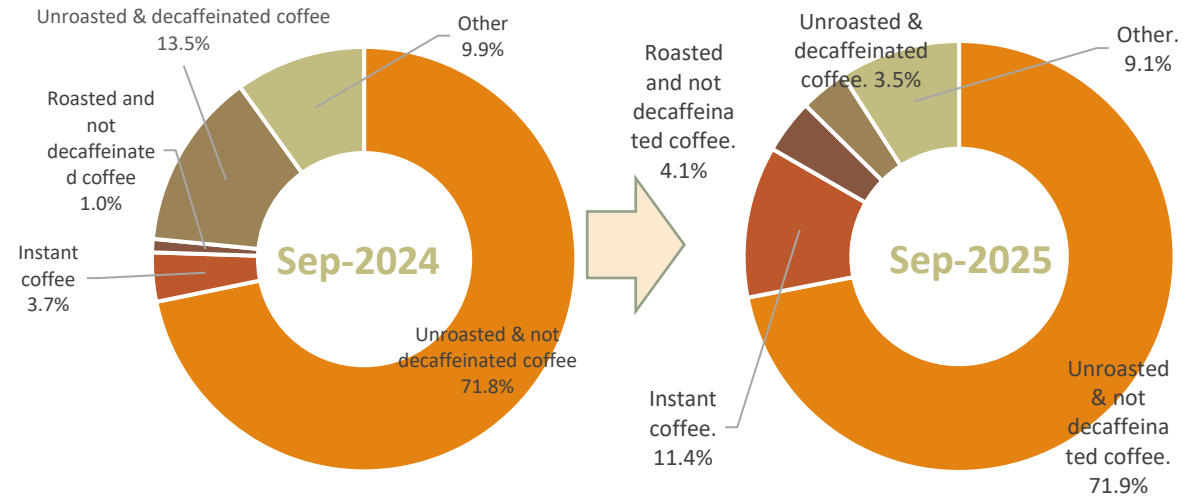
Changes in percentage of export value to China, Sep-2025



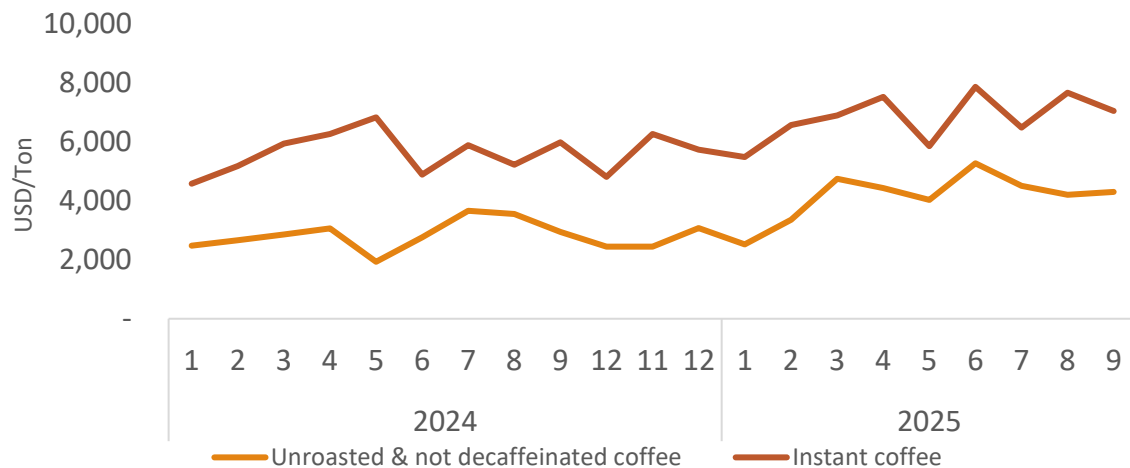


COFFEE

Structure of exports by products to China, Sep-2025



Average export price to China, Sep-2025



Export results to China, Sep-2025



Unroasted & not decaffeinated coffee

Value: **5.3** mil. USD
Decreases **55.8%** compared to Aug-2025
Decreases **48.6%** compared to Sep-2024



Instant coffee

Value: **4.7** mil. USD
Increases **28.3%** compared to Aug-2025
Decreases **10.9%** compared to Sep-2024



Roasted and not decaffeinated coffee

Value: **05** mil. USD
Decreases **36.8%** so compared to Aug-2025
Decreases **54.6%** compared to Sep-2024

Instant coffee

The average export price in Sep-2025 is **7,056** USD/ton. **decreases 8%** compared to the previous month; and **increases 2.3%** compared to the same month of 2024

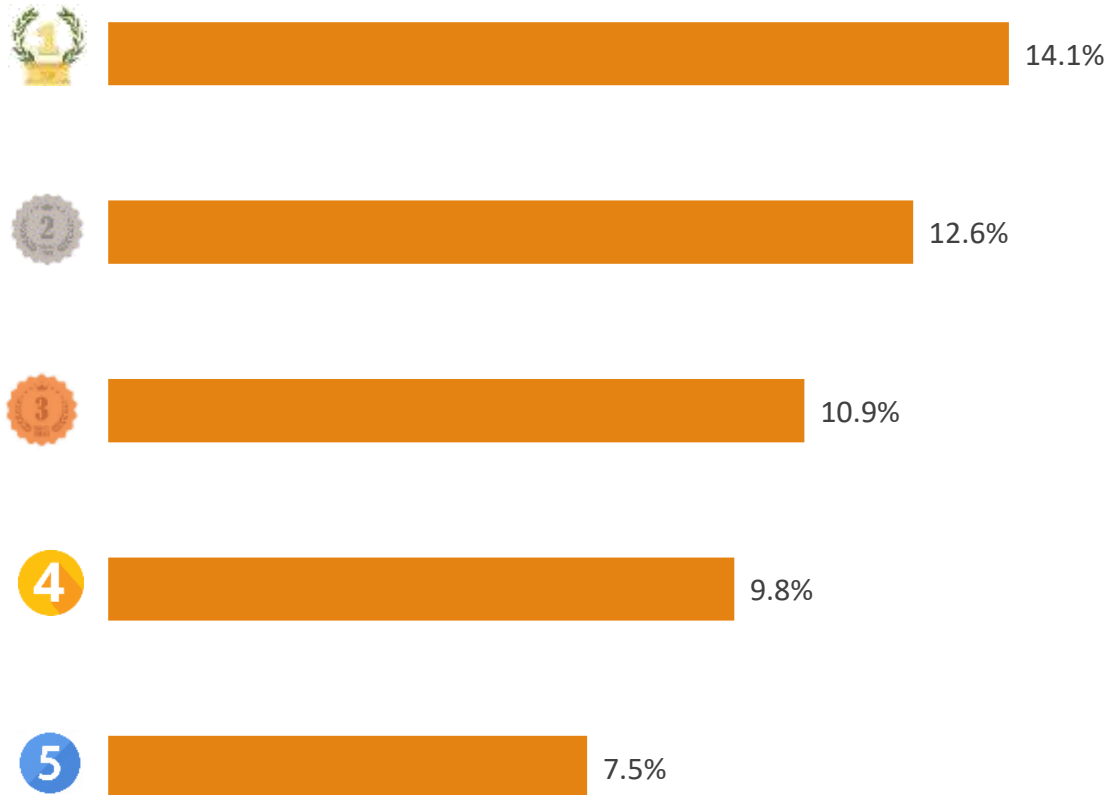
Unroasted & not decaffeinated coffee

The average export price in Sep-2025 is **4,303** USD/ton. **increases 17.9%** compared to the previous month; and **increases 45.8%** compared to the same month of 2024

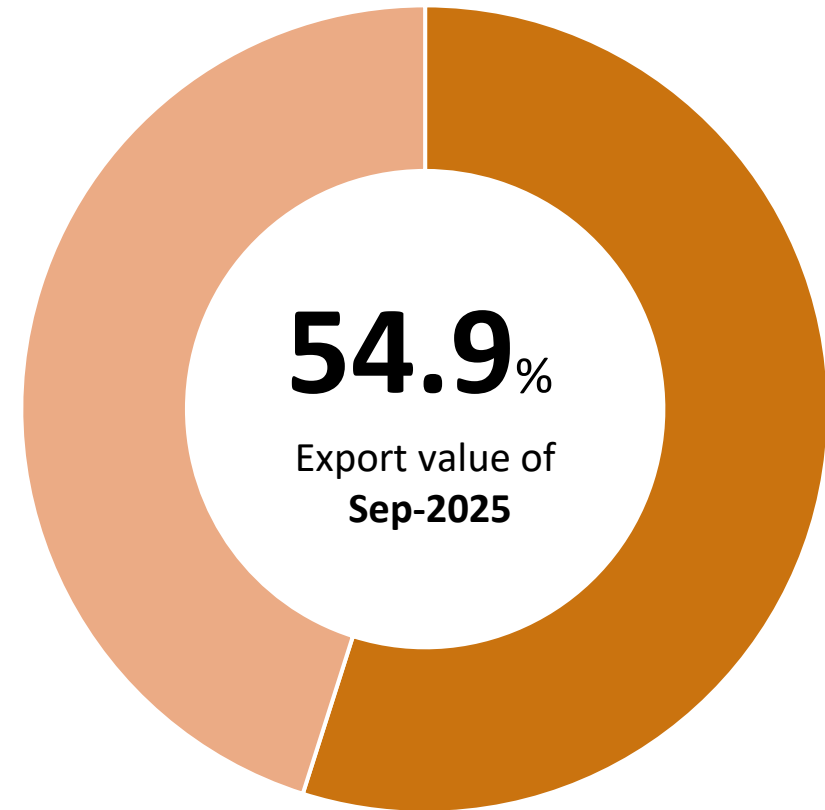


COFFEE

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



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





COFFEE

SPOTLIGHTS

Yunnan Province, the China's coffee production hub, has seen a sharp surge in exports in 2025 thanks to rising global coffee prices and strong import demand from more than 30 countries, including Germany and Vietnam.

In the first eight months of 2025, Yunnan's coffee and processed coffee exports reached 7.7 billion yuan (about USD 1.1 billion) — the highest level nationwide. Local processing plants are upgrading technology to meet international market preferences. Yunnan currently has 1.2 million mu (approximately 197,000 hectares) of coffee plantations, accounting for nearly all of China's coffee output.

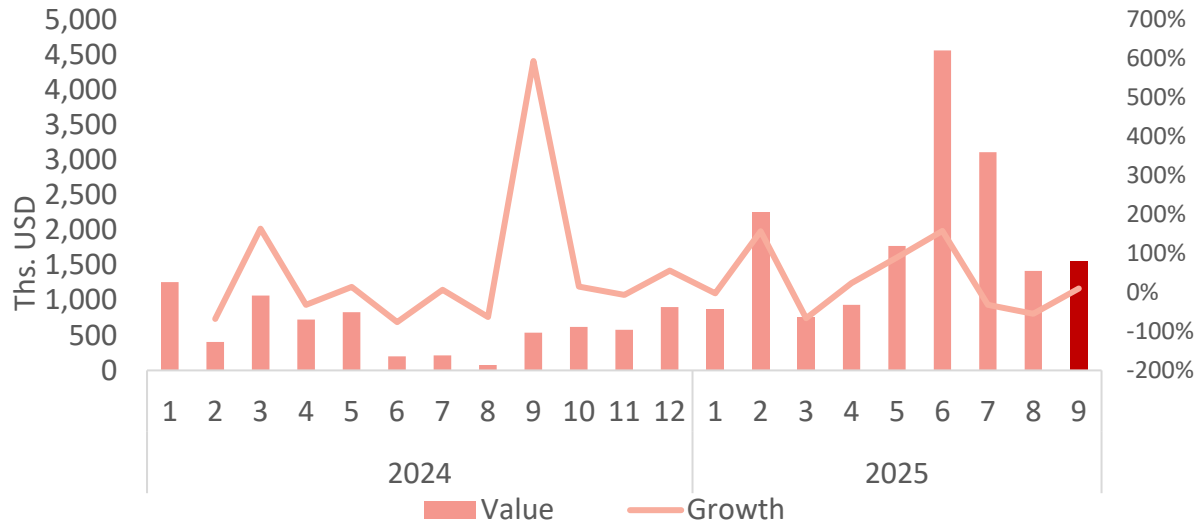
A decline in supply from major producers such as Brazil has driven international coffee futures to their highest levels in 50 years, pushing Yunnan's raw coffee bean prices from USD 5.56/kg at the end of 2024 to USD 9.17/kg in May 2025. In 2024, Yunnan exported 32,500 tons of coffee, a 358% increase from the previous year, according to Kunming Customs.





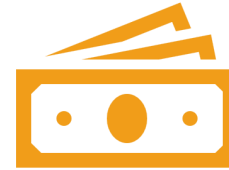
MEAT AND MEAT PRODUCTS (EXPORT)

Export value to China, Sep-2025



Export results to China, Sep-2025

VALUE



1.56

mil. USD

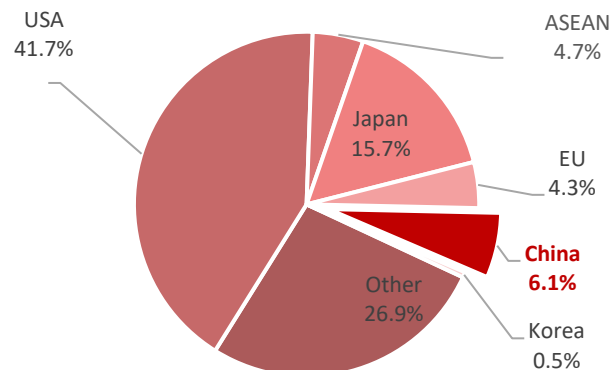
Increases **10.3%** compared to Aug-2025

Increases **190.5%** compared to Sep-2024

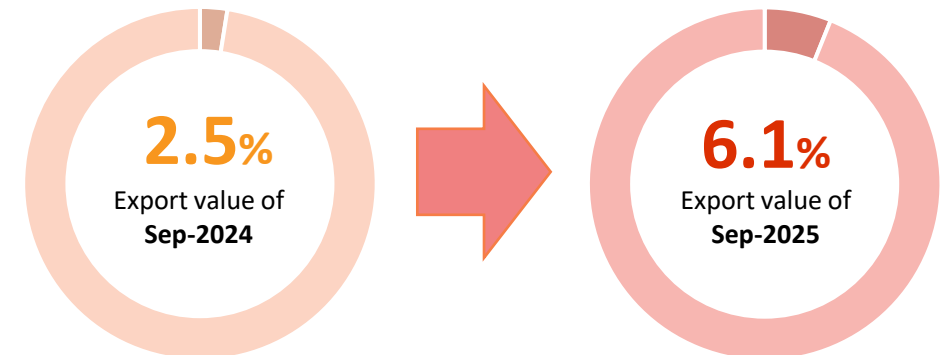
Increases **945.4 ths. USD** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **17.2 mil. USD, 232.8%** of total 2024

Percentage of export value to China, Sep-2025



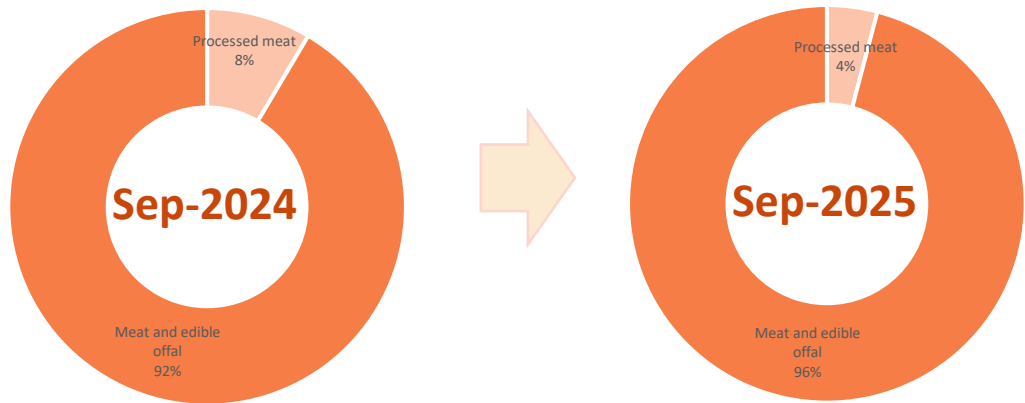
Changes in percentage of export value to China, Sep-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to China, Sep-2025



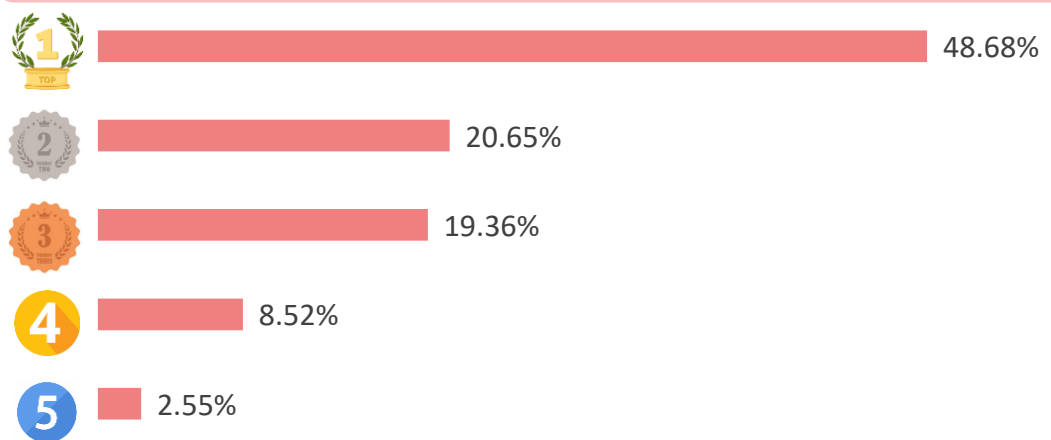
Export results to China, Sep-2025



Meat and edible offal

Value: **1.498** mil. USD
Increases **5.9%** compared to Aug-2025
Increases **184%** compared to Sep-2024

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



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

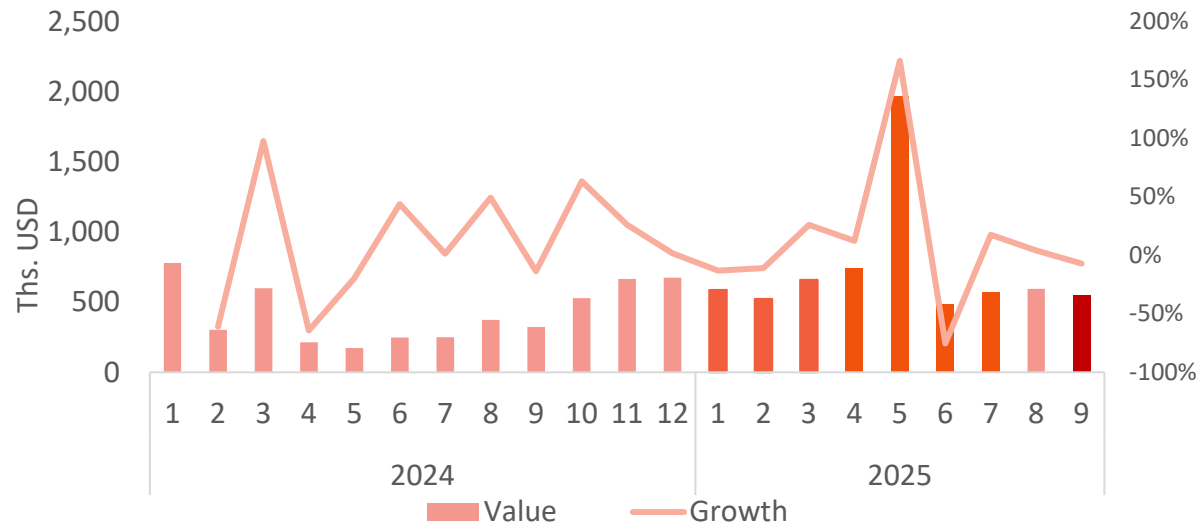


Source: Calculated from data of the Department of Customs



MEAT AND MEAT PRODUCTS (IMPORT)

Import value to China, Sep-2025



Import results to China, Sep-2025

VALUE



51.97

ths. USD

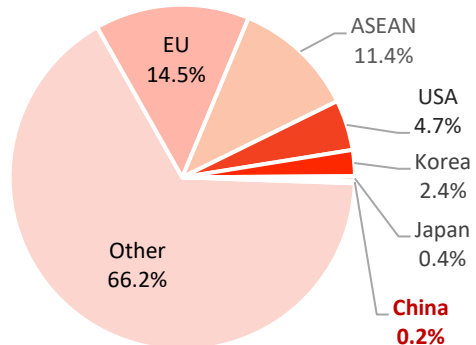
Decreases **7%** compared to Aug-2025

Increases **71%** compared to Sep-2024

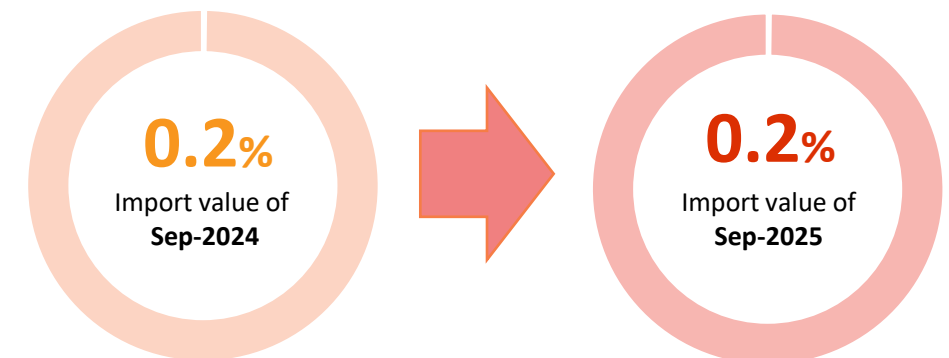
Increases **124.7 ths. USD** more than the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **6.7 mil. USD, 130.2%** of total 2024

Percentage of import value to China, Sep-2025



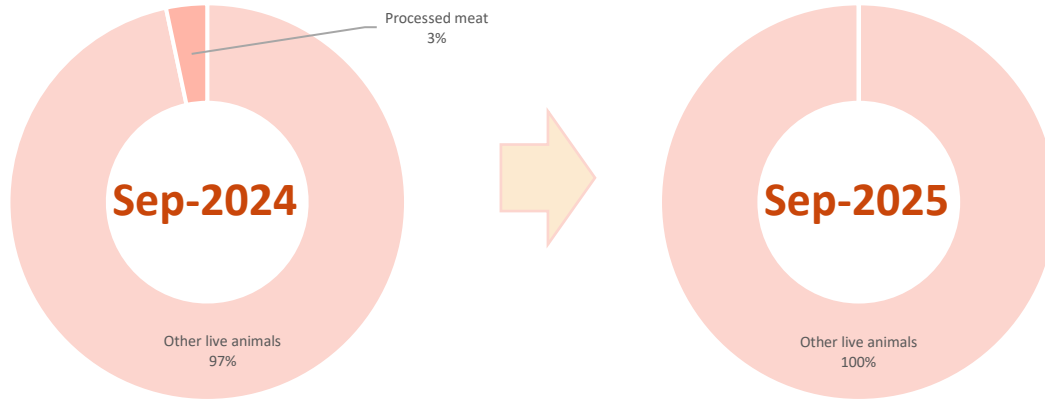
Changes in percentage of import value to China, Sep-2025





MEAT AND MEAT PRODUCTS (IMPORT)

Structure of imports by products from China, Sep-2025



Import results from China, Sep-2025



Other live animals

Value: **552** ths. USD

Decreases **6.7%** compared to Aug-2025

Increases **76.9%** compared to Aug-2025

TOP 5 import enterprises by value from China, Sep-2025



Value ratio of TOP 5 import enterprises from China, Sep-2025





MEAT AND MEAT PRODUCTS

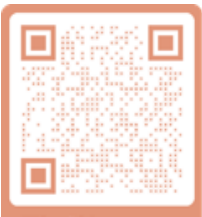
SPOTLIGHTS



China suspended beef imports from the United States since March 2025, disrupting trade valued at approximately USD 1.55 billion. Although no official announcement was made, export licenses for hundreds of U.S. meat processors have not been renewed. This move is seen as part of Beijing's broader strategy to leverage its position as the world's largest agricultural importer to apply pressure in trade relations with the U.S.

The suspension comes as China intensifies agricultural trade controls to protect domestic interests and diversify supply sources, shifting toward partners such as Brazil and Australia. This policy not only reduces market opportunities for U.S. beef but also significantly alters the global supply-demand balance, reinforcing China's influence in shaping international agricultural markets and prices.

Source: Graintrade.com.ua





MEAT AND MEAT PRODUCTS

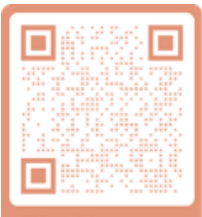
SPOTLIGHTS



In the context of ongoing trade tensions with the United States, China has sharply increased beef imports from Brazil to ensure a stable domestic supply. In September, China imported 187,340 tons of beef from Brazil, up 38% year-on-year, accounting for nearly half of Brazil's total beef exports — a record high, underscoring China's growing role as the leading consumer market for Brazil's beef industry.

The increasing imports happens as Beijing intensifies efforts to diversify supply sources, reduce dependence on the U.S., and navigate global trade frictions. Driven by strong Chinese demand, Brazil's beef export revenues in September reached USD 1.92 billion, a 49% increase from the same period last year, highlighting China's powerful purchasing influence, which continues to be a key driver of global beef trade growth.

Source: Ggromeat.com





Any comments. please send to:

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