

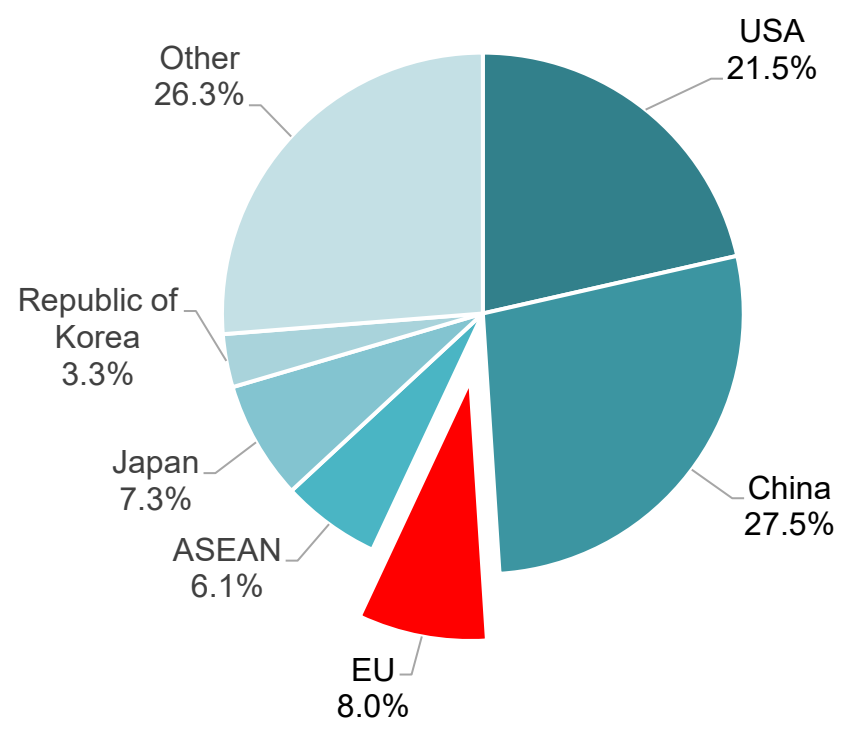


# MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

FROM VIETNAM TO **THE EU MARKET**

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

Export proportion of AFF product to the EU, Oct-2025

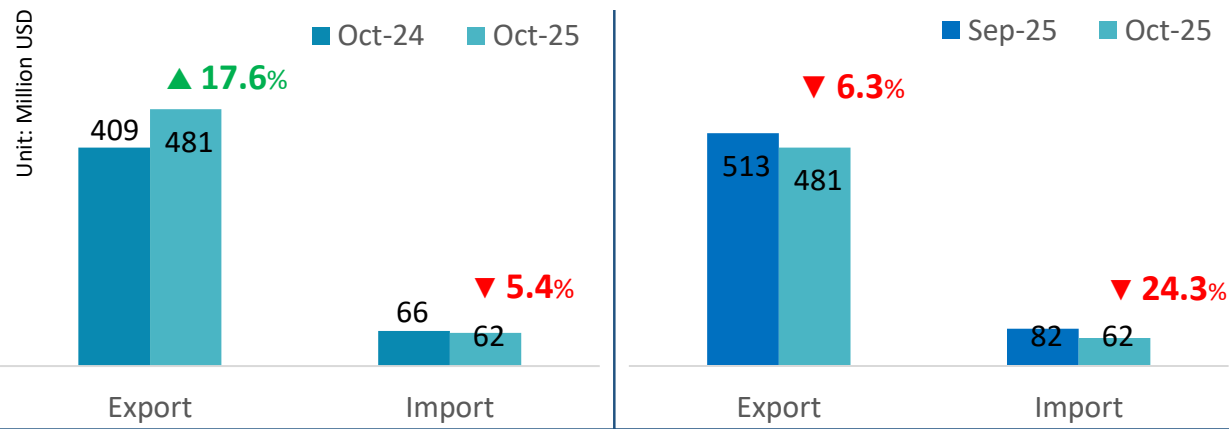


Changes in export proportion of AFF product to the EU Oct-2025 compared to Sep-2025 and Oct-2024

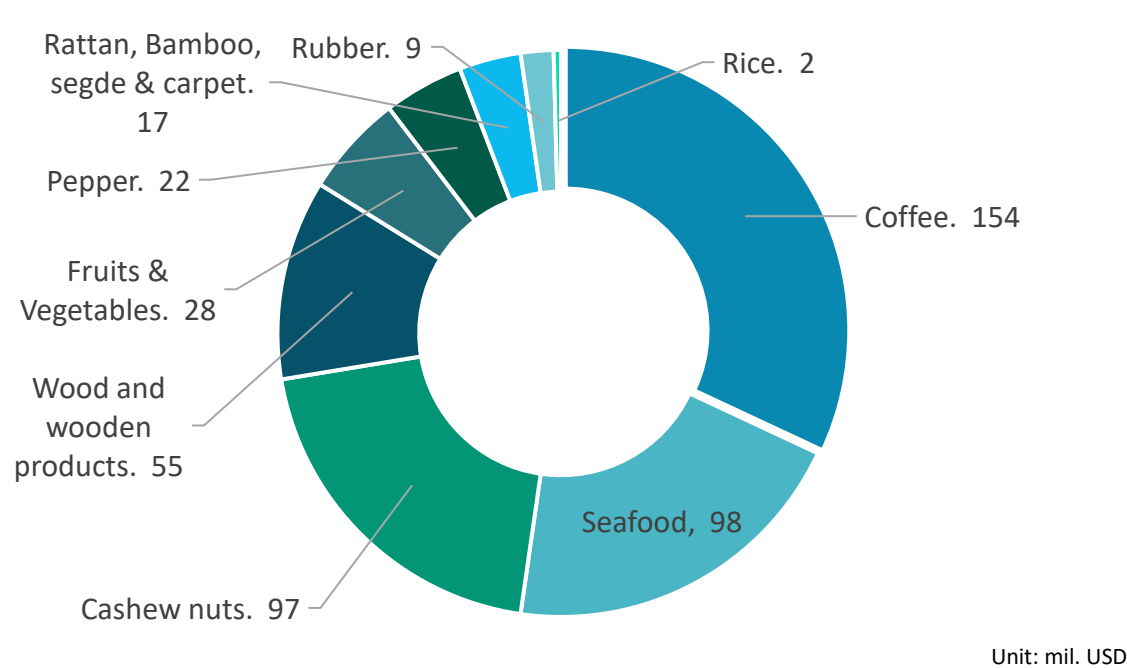
	Export value (mil. USD)	Compared to Sep-2025	Compared to Oct-2024
USA	1,292	▲ 13.2%	▲ 16.5%
China	1,658	▲ 16.7%	▲ 18.0%
EU	481	▲ 6.0%	▲ 6.3%
ASEAN	370	▼ 5.5%	▼ 6.7%
Japan	442	▲ 5.9%	▲ 6.1%
Republic of Korea	198	▲ 1.9%	▲ 1.5%
Total	6,023		

# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE EU IN OCTOBER 2025

AFF product import-export turnover between Vietnam and the EU, Oct-2025

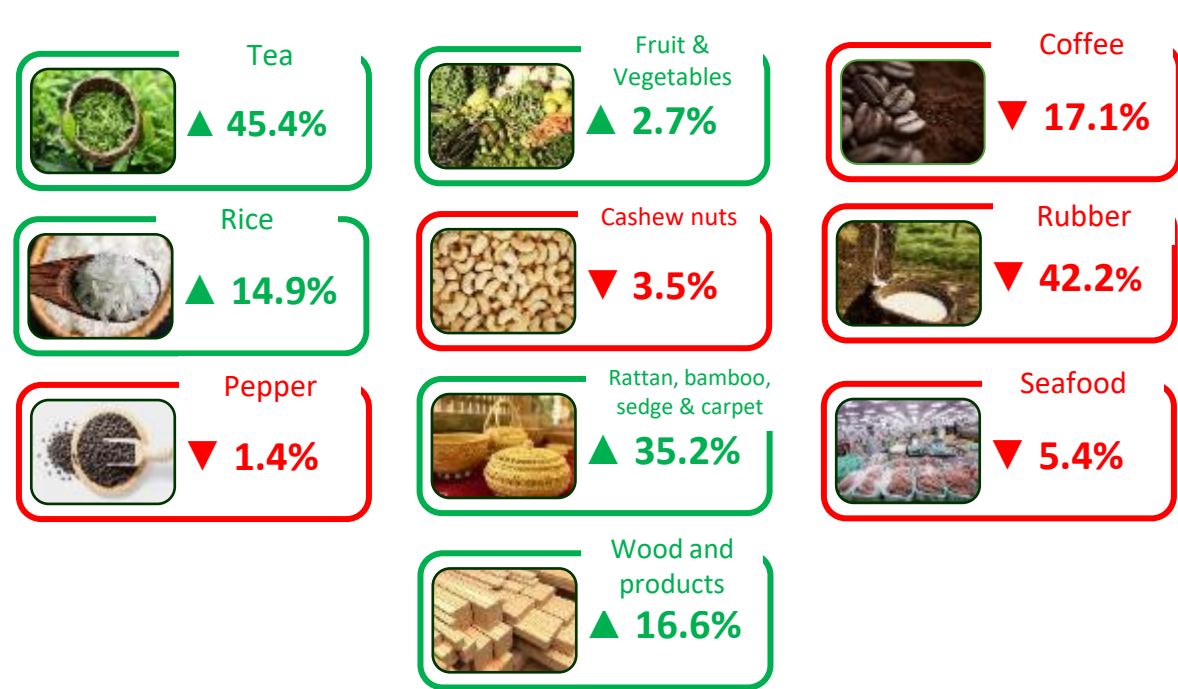


Key AFF product export value to the EU, Oct-2025

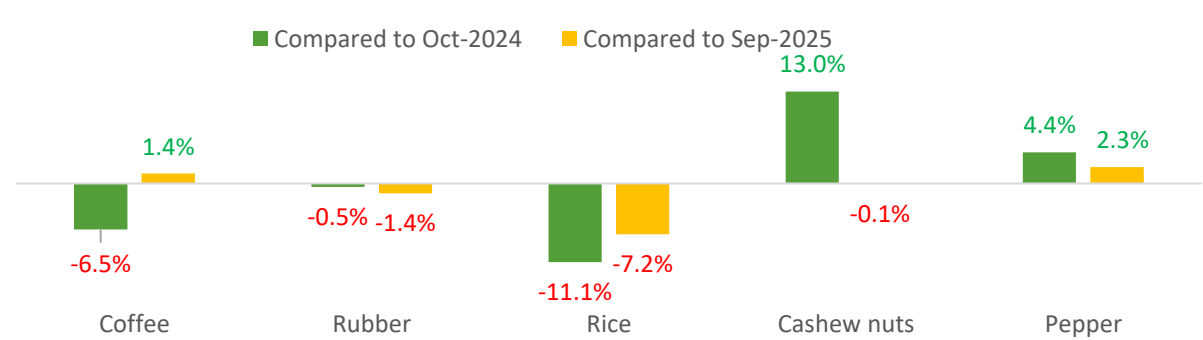


Source: Department of Customs

Changes in key AFF product export value to the EU in Oct-2025 compared to Sep-2025



Changes in average export value of key AFF products to the EU in Oct-2025 compared to Oct-2024 and Sep-2025





## The EU reduces warnings on Vietnamese agricultural products by 50%

After more than five years of implementing the EU–Vietnam Free Trade Agreement (EVFTA), agricultural trade between Vietnam and the European Union has achieved many positive results. Vietnam is currently among the countries with the fewest products

subject to border controls. Only four products remain on the inspection list: durian; okra; bell peppers; and dragon fruit. Notably, in the first nine months of this year, the number of warnings issued by the EU regarding Vietnam’s agricultural exports decreased by around 50% compared with the same period last year, reflecting improved quality control and regulatory compliance among Vietnamese exporters.

According to Mr. Ngo Xuan Nam,

Deputy Director of the Vietnam SPS Office, the 50% reduction in EU warnings is a positive signal, showing significant progress in quality control efforts by agricultural export enterprises. However, he cautioned that businesses should not become complacent, as even a single shipment violating food safety regulations could affect the reputation of the entire sector.

Source: vtv.vn



## The European economy faces numerous challenges

The European Commission’s Autumn 2025 Economic Forecast indicates that the EU economy is expected to maintain stable growth despite trade and geopolitical uncertainties. Improved export performance, recovering domestic demand, and a strong labor market continue to be the main drivers, with EU real GDP projected to grow by 1.4% during 2025–2026 and by 1.5% in 2027. Inflation in the Eurozone is expected to decline toward the ECB’s 2% target, while household consumption and investment are set to recover, particularly in construction and equipment purchases.

However, the report also highlights major challenges facing the EU. Global trade instability, elevated tariff levels, and a strong euro could weaken export competitiveness. Although some new trade agreements may help ease uncertainty, the risks to the growth outlook remain tilted to the downside, including geopolitical tensions, financial market volatility, and

the impacts of extreme weather.

On the fiscal side, rising defense expenditures are expected to slightly increase budget deficits and public debt in the coming years. Nevertheless, the European Commission notes that stronger reforms, increased investment in productive capacity within the bloc, and newly concluded trade agreements could provide additional growth momentum.

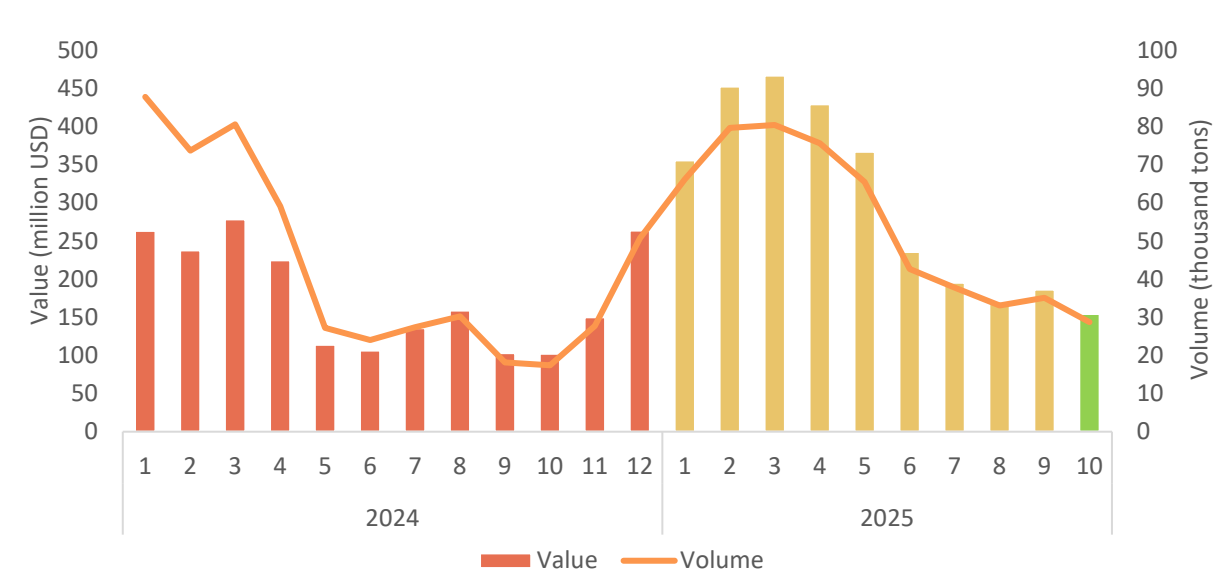
Source: lsvn.vn





# COFFEE

## Export volume and value to the EU, Oct-2025



## Export results to the EU, Oct-2025

### VALUE

**154.2** *mil. USD*

⬇️ Decrease **17.1%** compared to Sep-2025

⬆️ Increase **51.3%** compared to Oct-2024

⬇️ **23.8 mil. USD** less than compared to monthly average in 2024.

❖ Accumulated 10 months of 2025 reaches **3** billion USD, **140.9%** of total 2024.

### VOLUME

**28.7** *thousand tons*

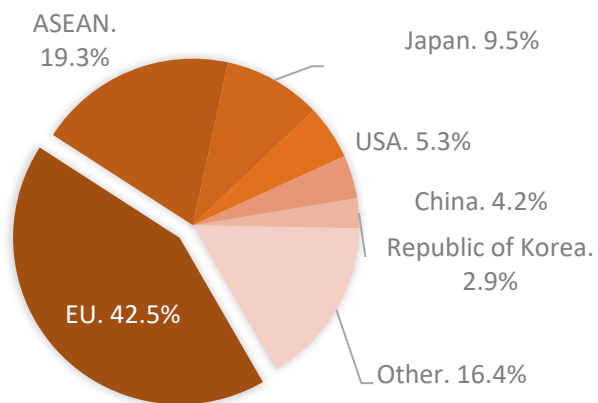
⬇️ Decrease **18.2%** compared to Sep-2025

⬆️ Increase **65%** compared to Oct-2024

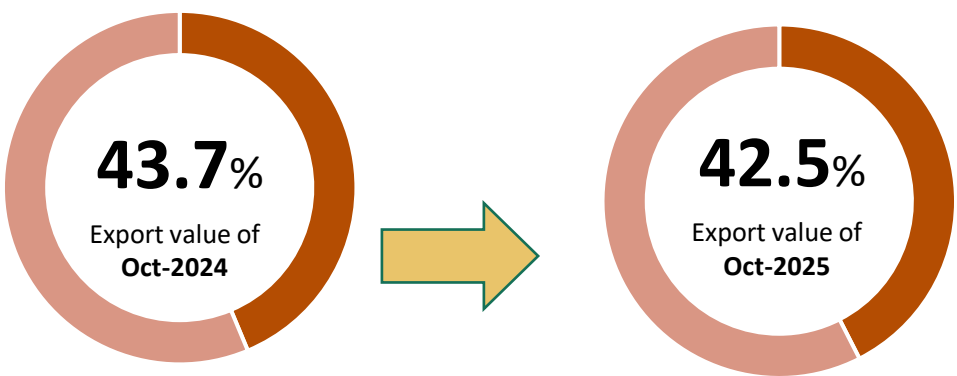
⬇️ **14.9 thousand tons** less than compared to monthly average in 2024.

❖ Accumulated 10 months of 2025 reaches **544.5** thousand tons, **104%** of total 2024.

## Percentage of export value to the EU, Oct-2025



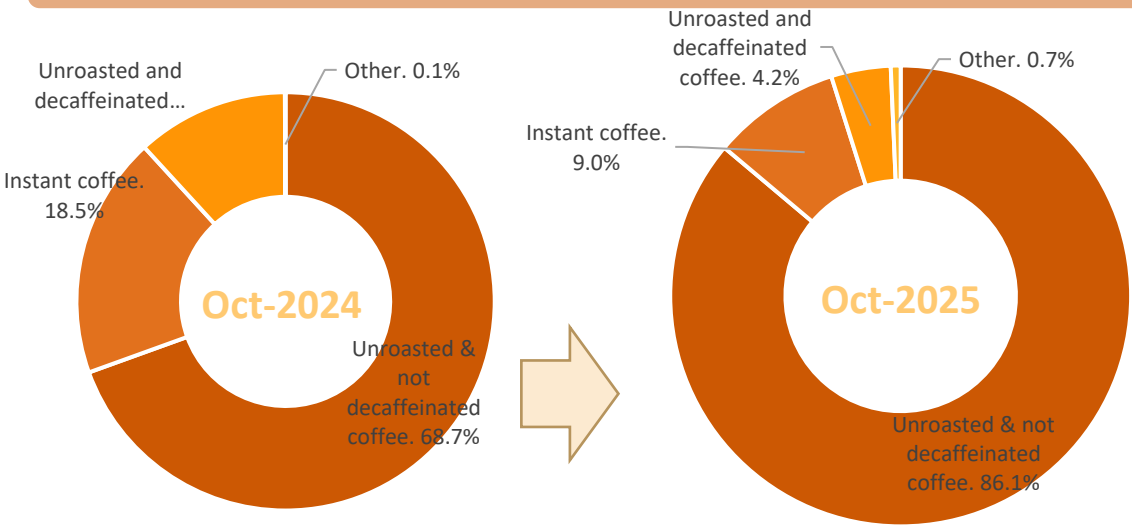
## Changes in percentage of export value to the EU, Oct-2025



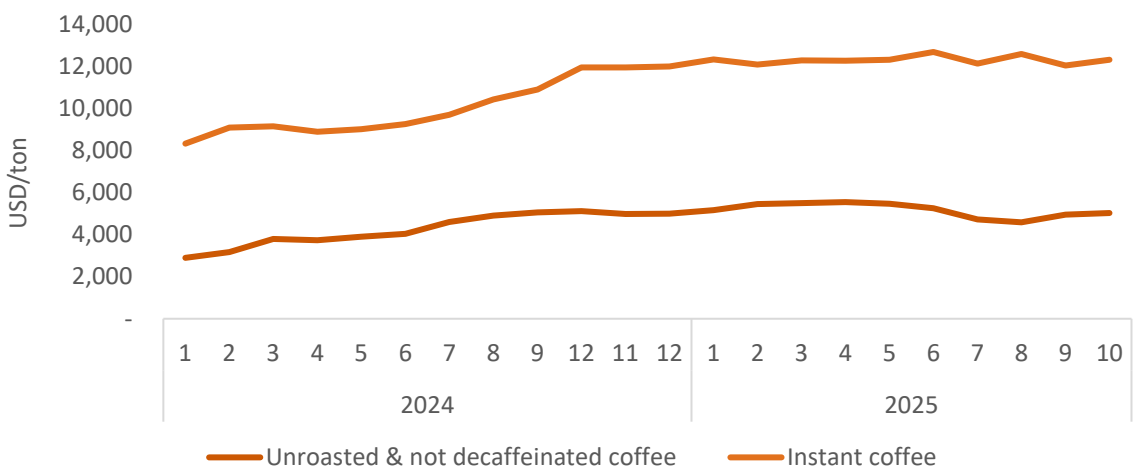


# COFFEE

## Structure of exports by products to the EU, Oct-2025



## Average export price to the EU, Oct-2025



Source: Department of Customs

## Export results to the EU, Oct-2025



### Unroasted & not decaffeinated coffee

Value: **135.3** mil. USD  
Decrease **17.7%** compared to Sep-2025  
Increase **100%** compared to Oct-2024



### Instant coffee

Value: **14.1** mil. USD  
Decrease **26.2%** compared to Sep-2025  
Decrease **22.4%** compared to Oct-2024



### Unroasted and decaffeinated coffee

Value: **6.6** mil. USD  
Increase **58.3%** compared to Sep-2025  
Decrease **42.6%** compared to Oct-2024

### Instant coffee

The average export price in Oct-2025 is **12.313** USD/ton; **increase 2.3%** compared to the previous month; and **increase 3.2%** compared to the same month of 2024.

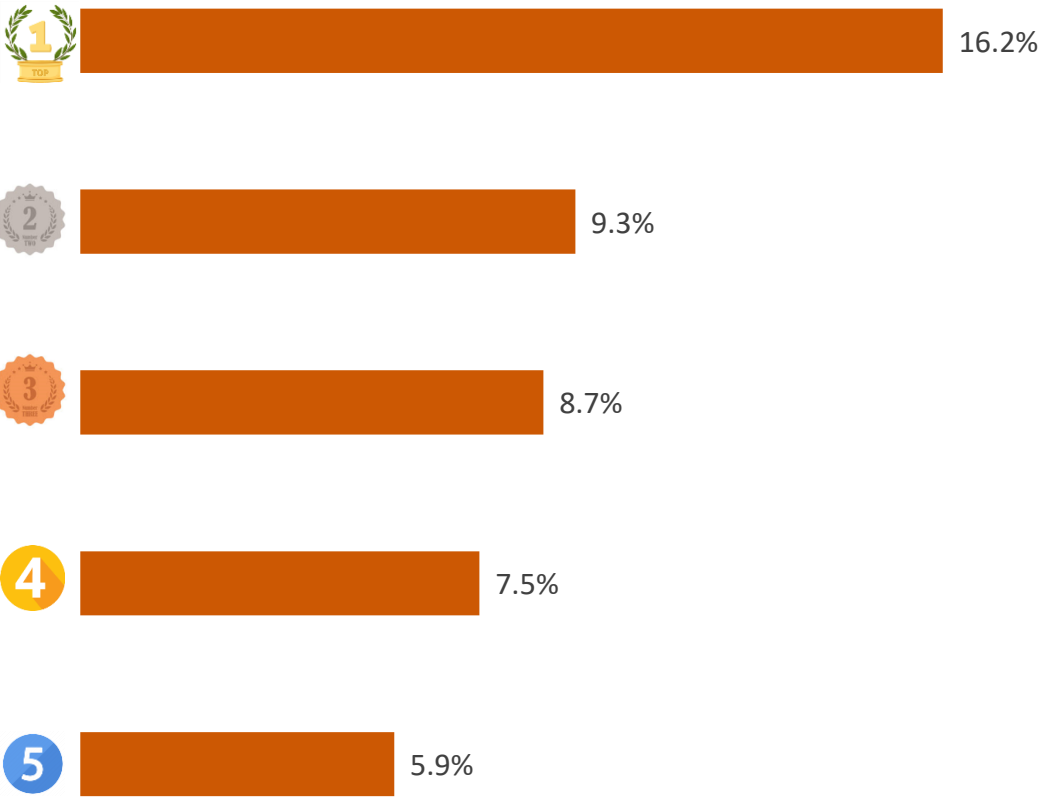
### Unroasted & not decaffeinated coffee

The average export price in Oct-2025 is **5.019** USD/ton; **increase 1.5%** compared to the previous month; and **decrease 1.8%** compared to the same month of 2024.

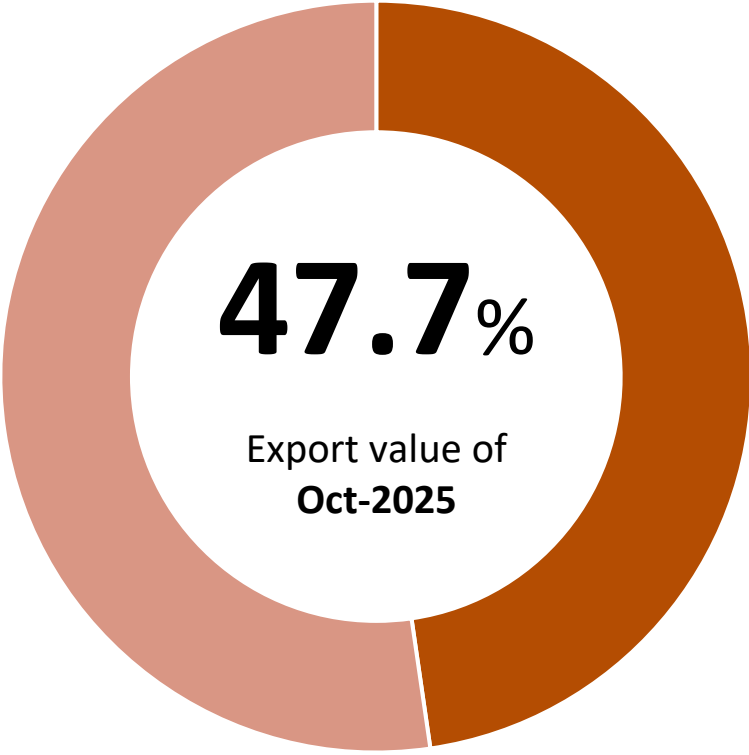


# COFFEE

TOP 5 export enterprises by value to **the EU, Sep-2024**



Value ratio of TOP 5 export enterprises to **the EU, Sep-2024**







# COFFEE

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## SPOTLIGHTS



Fairtrade International has welcomed the European Commission's new proposal to continue implementing the EUDR without delay, viewing it as a commitment to forest protection while reducing compliance burdens for small and micro-enterprises. However, Fairtrade argues that the current adjustments are still insufficient to support millions of smallholder coffee farmers outside the EU, especially those in countries not classified as "low risk" and those that do not export directly to Europe.

Fairtrade emphasizes that many producers need financial assistance, technical support, and capacity building to meet EUDR requirements. The organization also calls on EU lawmakers to design fairer solutions for smallholder farmers so that the EUDR can both protect forests and remain practical and sustainable in real-world implementation.

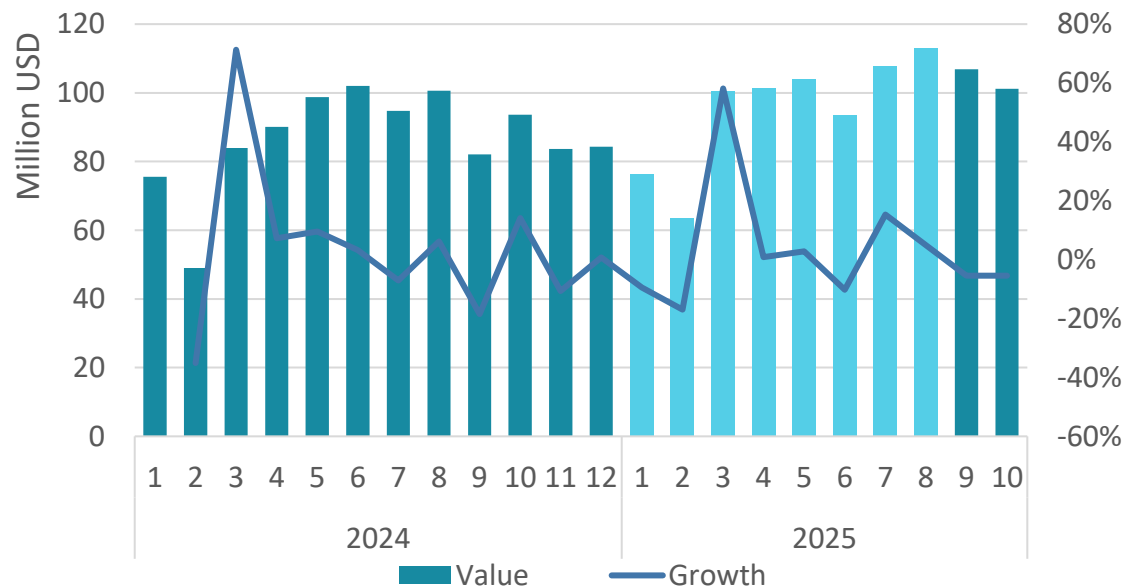






# SEAFOOD

## Export value to the EU, Oct-2025



## Export results to the EU, Oct-2025

### VALUE

**101.1** *mil. USD*



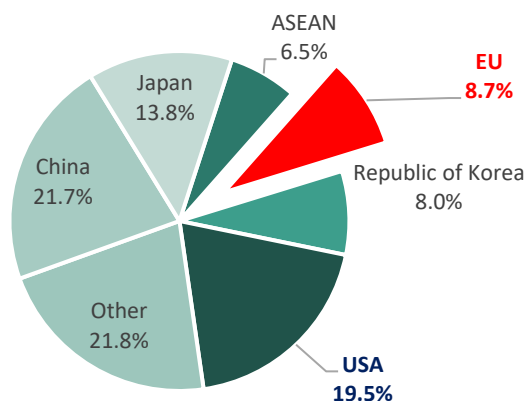
↘ Decrease **5.4%** compared to Sep-2025

↗ Increase **8.0%** compared to Oct-2024

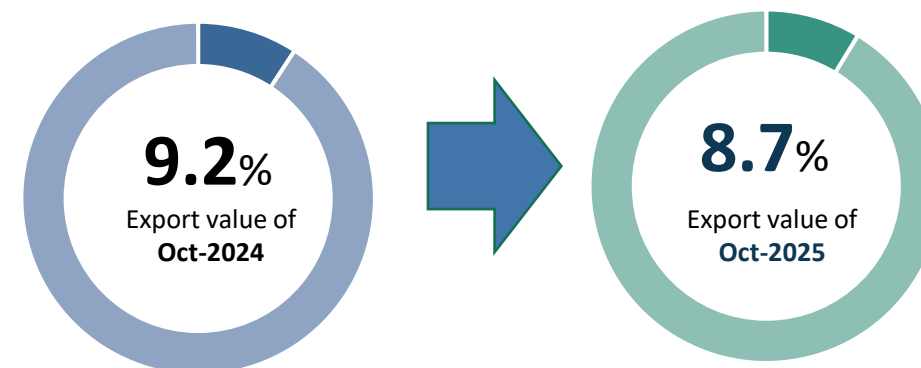
▲ **14.6 mil. USD** more than compared to average rate in 2024

❖ Accumulated 10 months of 2025 reaches **967.9** mil. USD, **93.2%** of total 2024

## Percentage of export value to the EU, Oct-2025



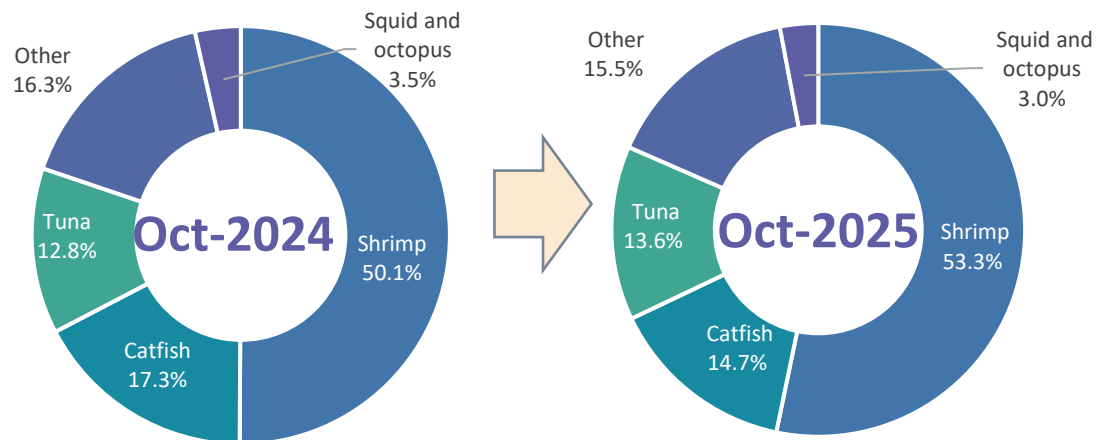
## Changes in percentage of export value to the EU, Oct-2025



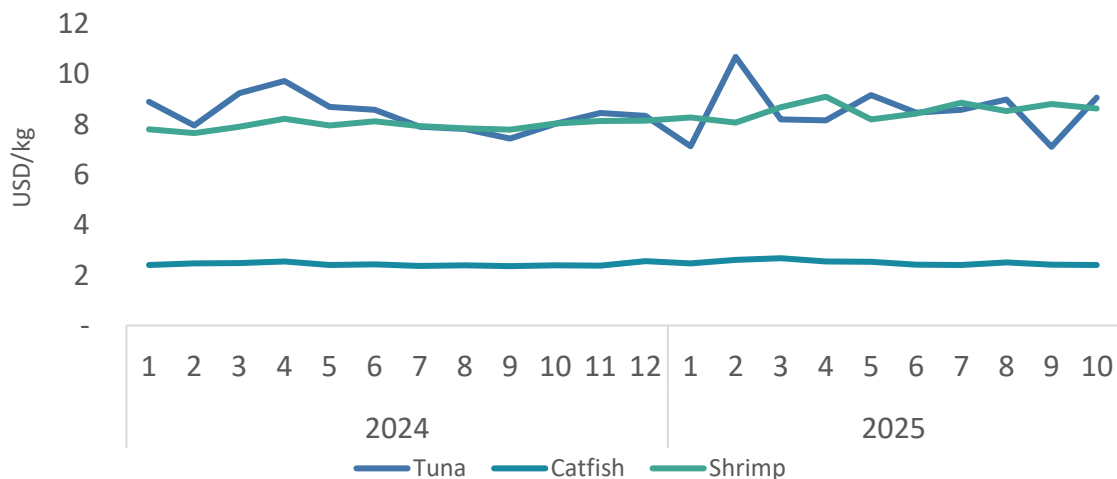


# SEAFOOD

## Structure of exports by products to the EU, Oct-2025



## Average export price to the EU, Oct-2025



## Structure of exports by products to the EU, Oct-2025



### Shrimp

Value: **53.9** mil. USD

Decrease **7.9%** compared to Sep-2025

Increase **14.8%** compared to Oct-2024



### Catfish

Value: **14.8** mil. USD

Increase **7.3%** compared to Sep-2025

Decrease **8.3%** compared to Oct-2024



### Tuna

Value: **13.8** mil. USD

Decrease **13.1%** compared to Sep-2025

Increase **14.6%** compared to Oct-2024

### Tuna

The average export price in Oct-2025 is **9.1** USD/kg; **increase 27.6%** compared to the previous month; and **increase 13.2%** compared to the same month of 2024.

### Catfish

The average export price in Oct-2025 is **2.4** USD/kg; **decrease 0.2%** compared to the previous month; and **increase 1.1%** compared to the same month of 2024.

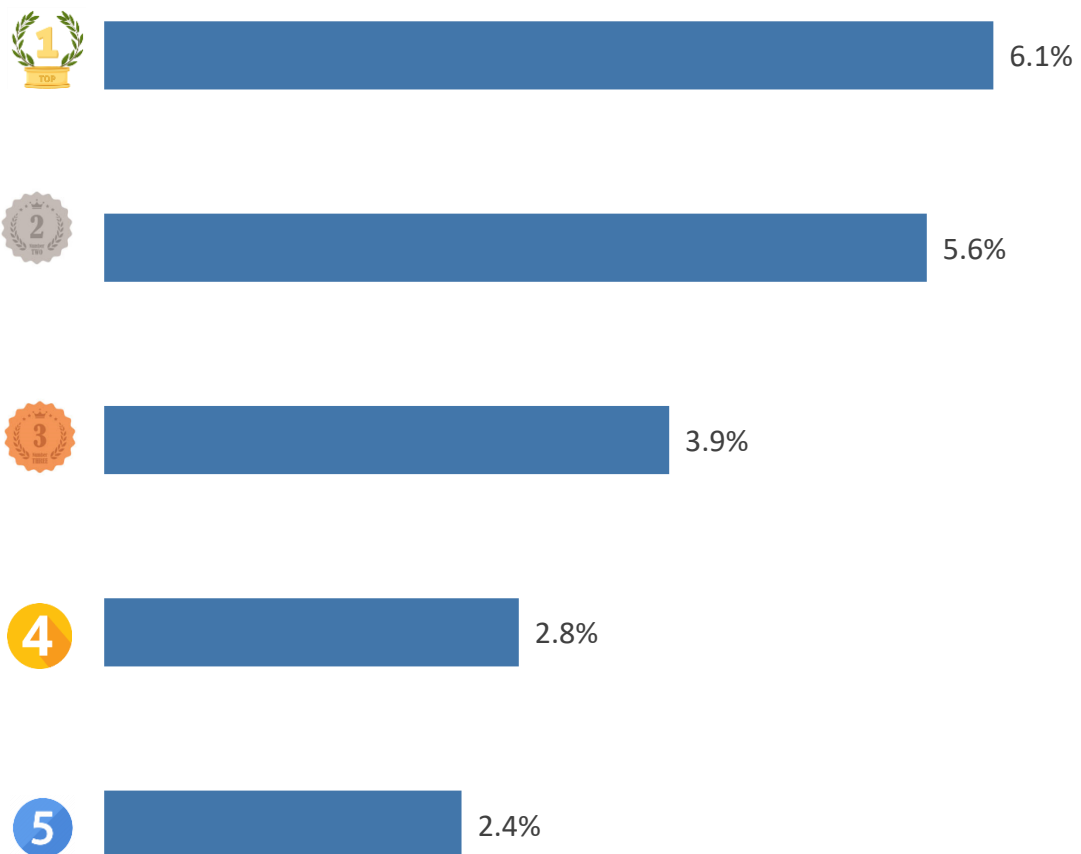
### Shrimp

The average export price in Oct-2025 is **8.6** USD/kg; **decrease 2.0%** compared to the previous month; and **increase 7.3%** compared to the same month of 2024.

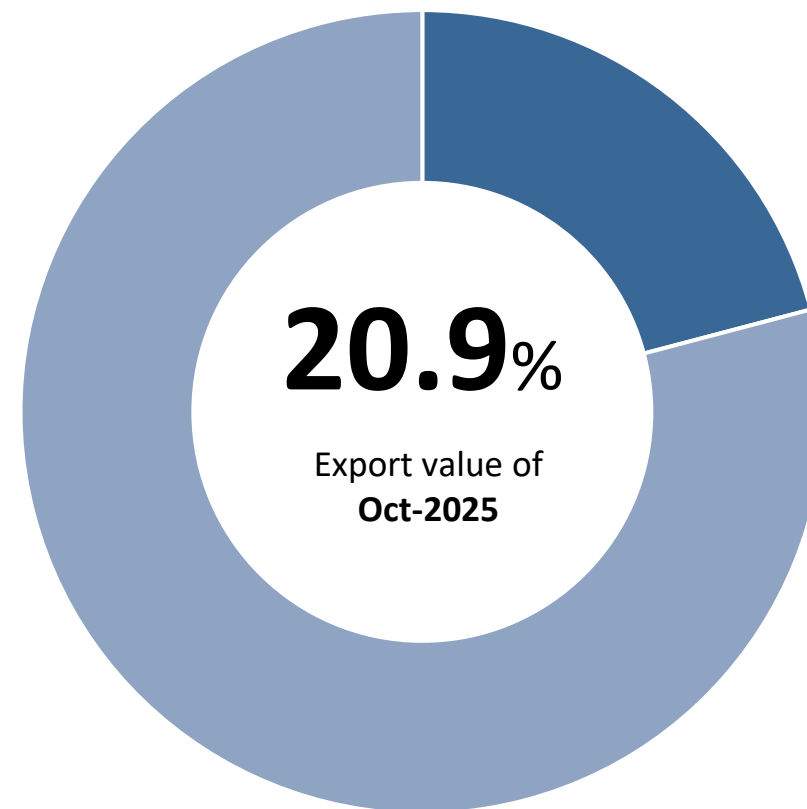


# SEAFOOD

## TOP 5 export enterprises by value to the EU, Oct-2025



## Value ratio of TOP 5 export enterprises to the EU, Oct-2025



## SPOTLIGHTS

### **The EU opens its market to 102 Indian seafood companies**

The European Union (EU) has officially authorized 102 Indian seafood enterprises to access the EU market after a nine-year interruption. This decision comes as India's seafood sector has been heavily impacted by U.S. tariff policies and the failure of the two countries to conclude a bilateral trade agreement this year. Thanks to an upgraded quality control system implemented through Quality Control Orders (QCOs), Indian companies have met the EU's stringent requirements and regained access to one of the world's most demanding markets.

In the past three months, India's seafood exports to the EU have increased significantly, helping to reduce pressure from the U.S. market. From April to October this year, India's seafood exports reached USD 4.82 billion, up from USD 4.21 billion in the same period last year, contributing to job creation and expanding business opportunities. According to India's Ministry of Commerce, the EU's reopening of the market not only boosts short-term export volumes but also reinforces India's position as a reliable supplier of high-quality seafood in the global marketplace.

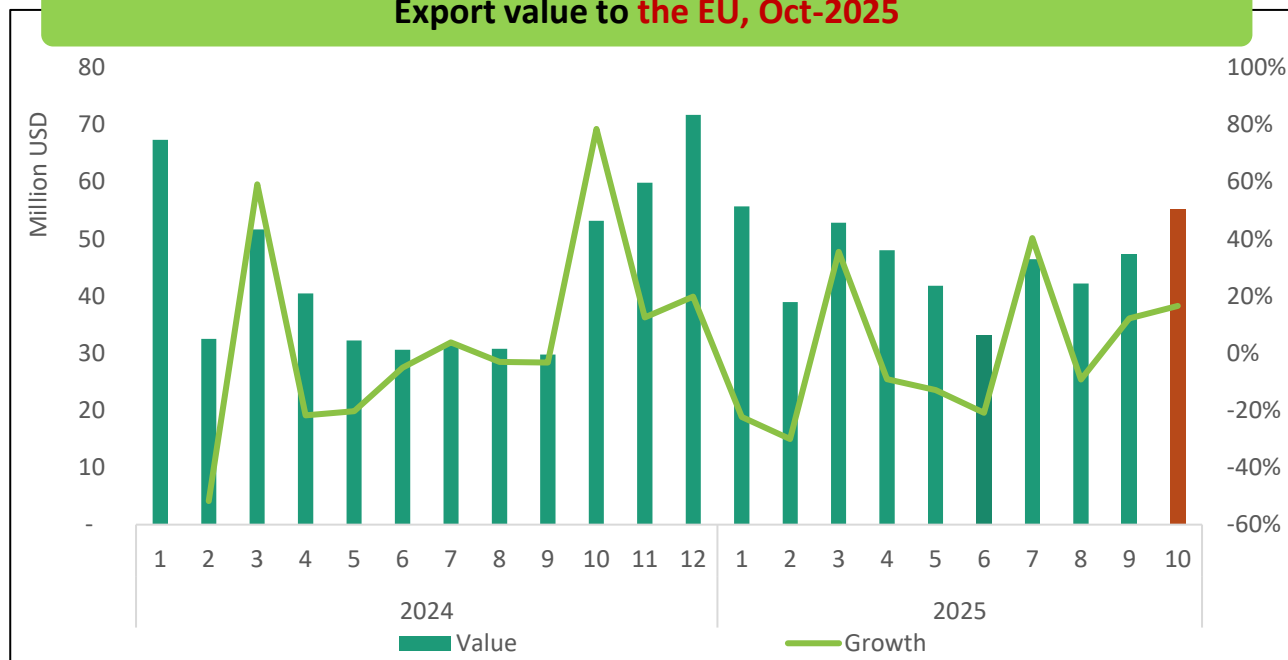






# WOOD AND WOODEN PRODUCTS

## Export value to the EU, Oct-2025



## Export results to the EU, Oct-2025

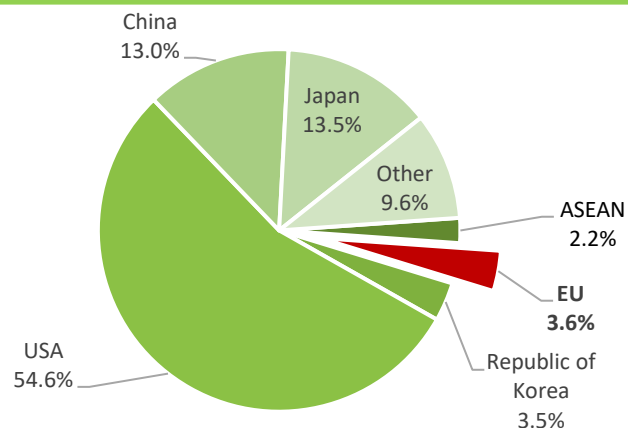
VALUE



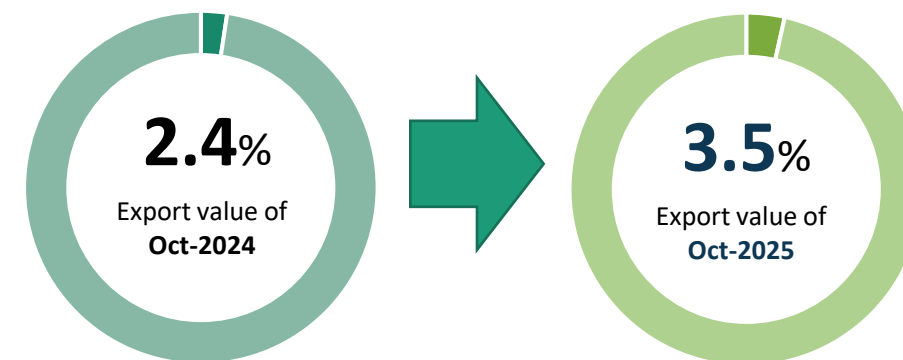
55  
mil. USD

- Increase **16.6%** compared to Sep-2025
- Increase **3.9%** compared to Oct-2024
- **10.9 mil. USD** more than compared to monthly average in 2024
- ❖ Accumulated 10 months of 2025 reaches **461.7** mil. USD, **86.8%** of total 2024

## Percentage of export value to the EU, Oct-2025



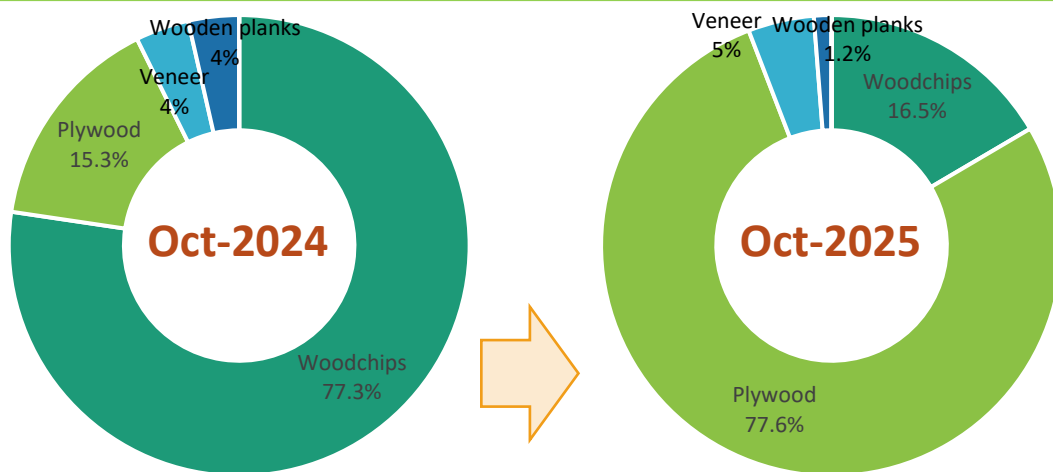
## Changes in percentage of export value to the EU, Oct-2025





# WOOD AND WOODEN PRODUCTS

## Structure of exports by products to the EU, Oct-2025



## Export results to the EU, Oct-2025



### Woodchips

Value: **1.6** mil. USD

Decrease **79%** compared to Sep-2025

Decrease **75%** compared to Oct-2024



### Plywood

Value: **7.7** mil. USD

Increase **5%** compared to Sep-2025

Increase **502%** compared to Oct-2024



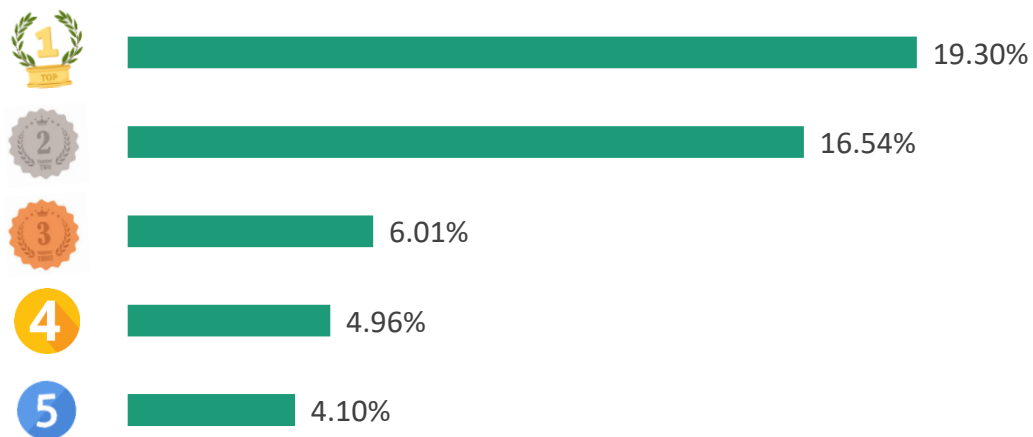
### Veneer

Value: **457** nghìn USD

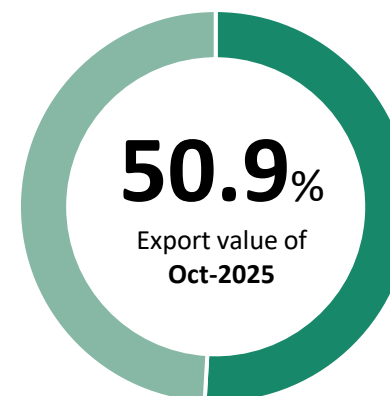
Decrease **38%** compared to Sep-2025

Increase **47%** compared to Oct-2024

## TOP 5 export enterprises by value to the EU, Oct-2025



## Value ratio of TOP 5 export enterprises to the EU, Oct-2025





## SPOTLIGHTS

The European sawn softwood industry is recovering and gradually stabilizing. According to the 73rd International Softwood Conference, EOS production remains at 78 million m<sup>3</sup>, down 10% from the 2021 peak, while demand in 2025 is expected to increase slightly but has not yet returned to pre-pandemic levels. Sawmills are facing significant pressure on profit margins due to record-high raw material prices (particularly Nordic roundwood), along with reduced spruce supply caused by climate change, forcing a shift toward pine.

Although the short-term outlook remains subdued, the market has shown some positive signs, including growing market share for wood-based materials and a modest recovery in construction activity.





# FRUITS AND VEGETABLES (EXPORT)

Export volume and value to the EU, Oct-2025



Export results to the EU, Oct-2025



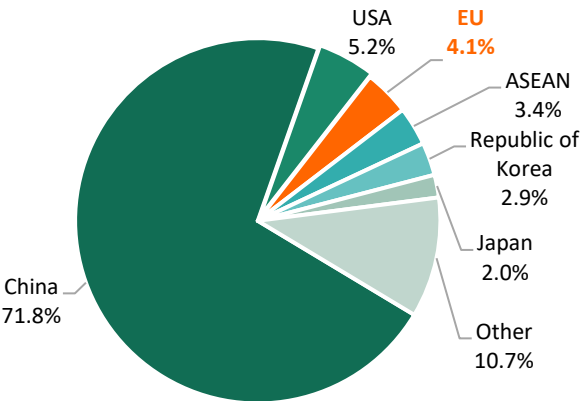
Increase **2.7%** compared to Sep-2025

Increase **53.0%** compared to Oct-2024

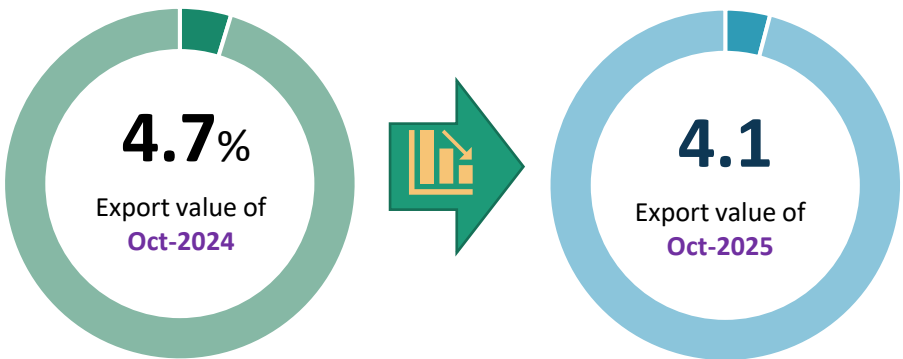
**11.3 mil. USD** more than compared to monthly average in 2024

Accumulated 10 months of 2025 reaches **403.2 mil.USD**, **127.6%** of total 2024

Percentage of export value to the EU, Oct-2025



Changes in percentage of export value to the EU, Oct-2025

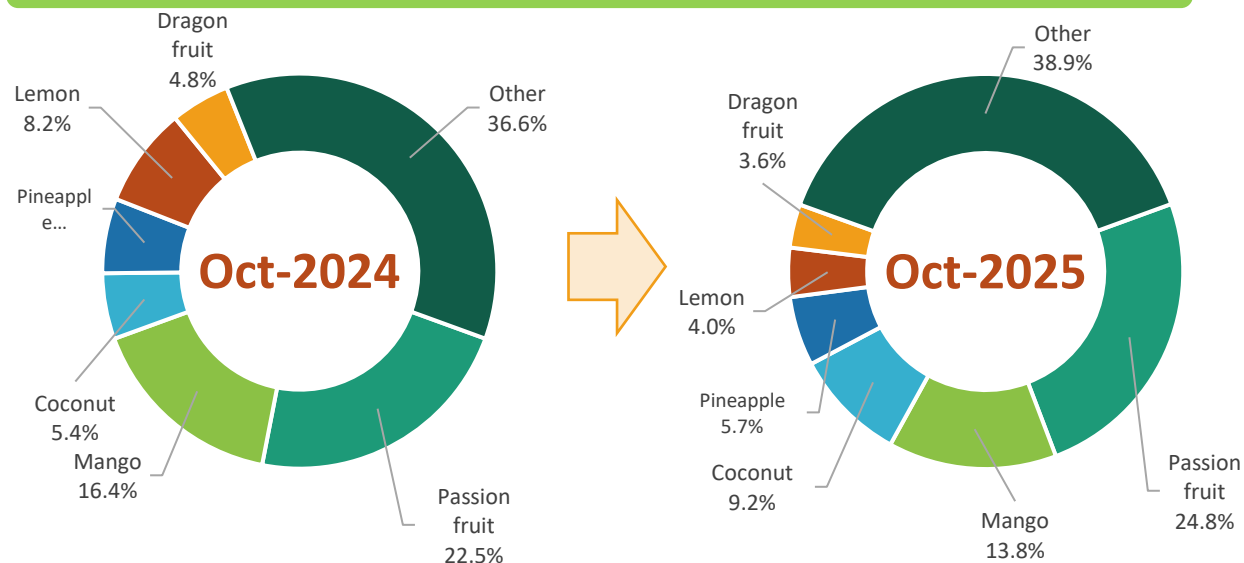






# FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the EU, Oct-2025



Export results of some main products to the EU, Oct-2025



## Passion fruit

Value: **9.3** mil. USD

Increase **7.5%** compared to Sep-2025

Increase **68.4%** compared to Oct-2024



## Mango

Value: **5.2** mil. USD

Increase **5.6%** compared to Sep-2025

Increase **29.0%** compared to Oct-2024



## Coconut

Value: **3.5** mil. USD

Increase **8.1%** compared to Sep-2025

Increase **161.9%** compared to Oct-2024



## Pineapple

Value: **2.1** mil. USD

Increase **24.3%** compared to Sep-2025

Increase **41.8%** compared to Oct-2024



## Lemon

Value: **1.5** mil. USD

Increase **23.7%** compared to Sep-2025

Decrease **24.6%** compared to Oct-2024



## Dragon fruit

Value: **1.3** mil. USD

Decrease **8.4%** compared to Sep-2025

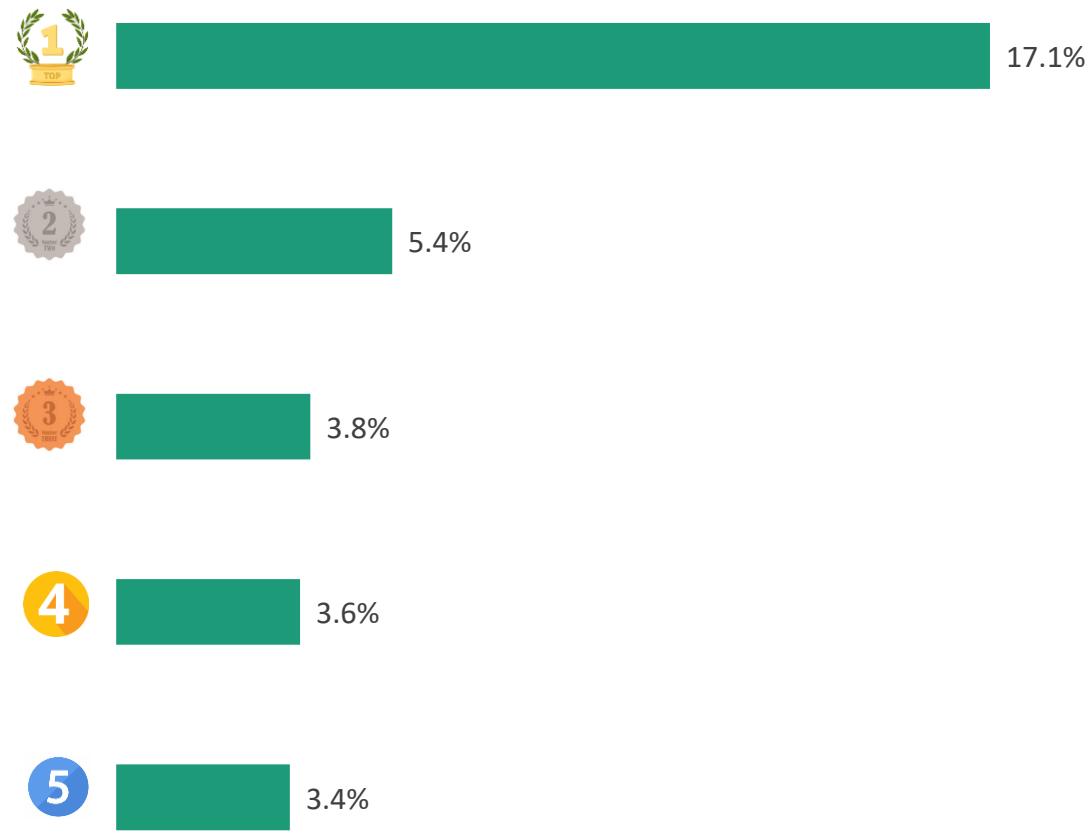
Increase **12.4%** compared to Oct-2024



# FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to the EU, Oct-2025

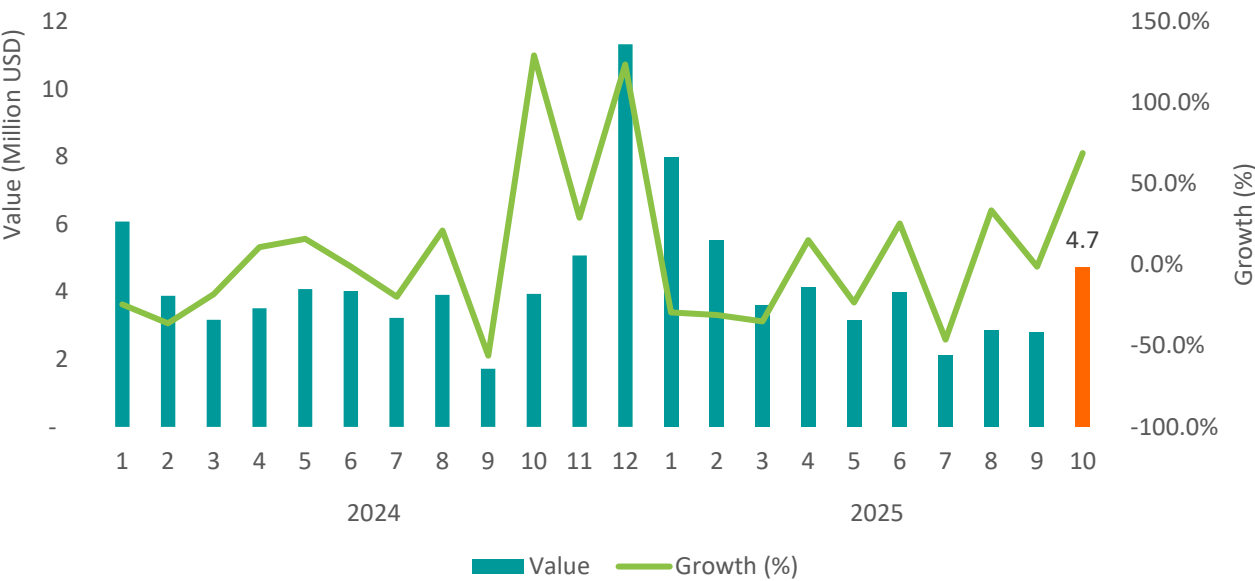
Value ratio of TOP 5 export enterprises to the EU, Oct-2025





# FRUITS AND VEGETABLES (IMPORT)

## Import value from the EU, Oct-2025



## Import results from the EU, Oct-2025

VALUE

4.7

mil. USD



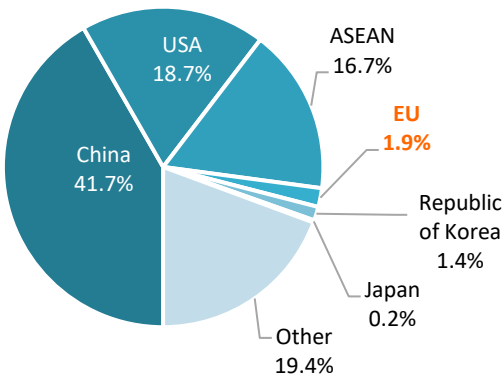
Increase **68.7%** compared to Sep-2025

Increase **20.4%** compared to Oct-2024

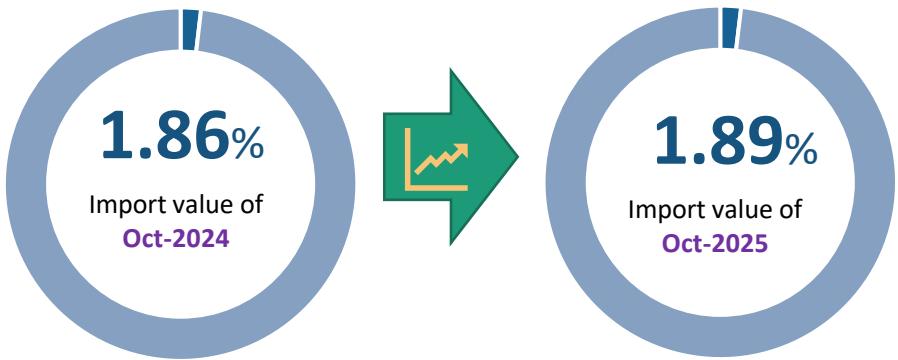
**0.24 mil. USD** more than compared to monthly average in 2024

Accumulated 10 months of 2025 reaches **40.8 mil. USD**, **75.7%** of total 2024

## Percentage of import value from the EU, Oct-2025



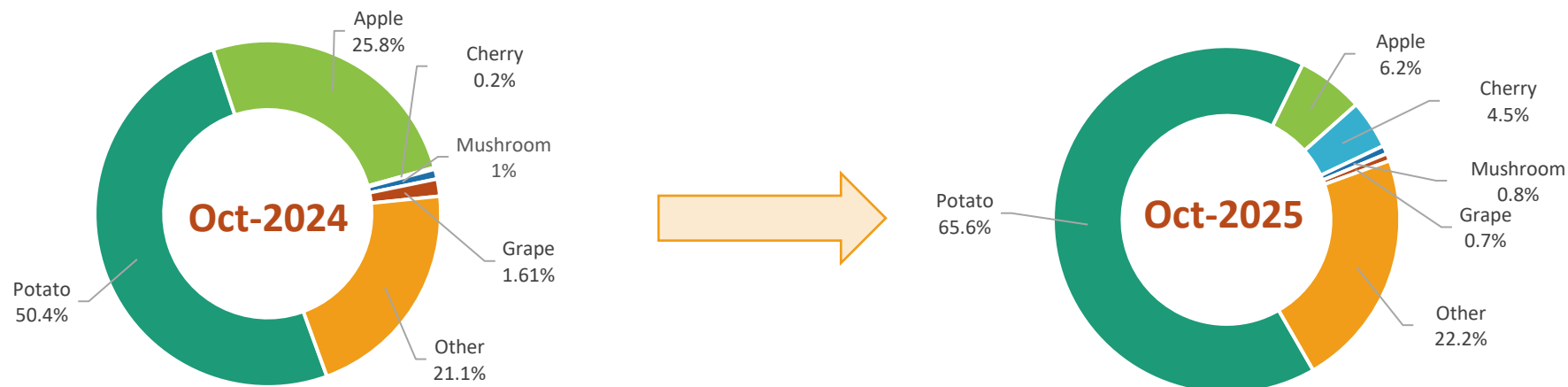
## Changes in percentage of import value from the EU, Oct-2025





# FRUITS AND VEGETABLES (IMPORT)

## Structure of imports by products from the EU, Oct-2025



## Import results of some main products from the EU, Oct-2025



### Potato

Value: **3.1** mil. USD

Increase **138.7%** compared to Sep-2025

Increase **56.6%** compared to Oct-2024



### Apple

Value: **292.7** thousand USD

Increase **450.4%** compared to Sep-2025

Decrease **71.1%** compared to Oct-2024



### Cherry

Value: **214.7** thousand USD

Increase **52 times** compared to Sep-2025

Increase **34 times** compared to Oct-2024



## SPOTLIGHTS



### **Spain approves the use of garlic extract as a nematicide for strawberries in Huelva**

Spain has approved the special use of a 100% SC-form garlic extract as a nematicide in strawberry cultivation in Huelva Province. This decision addresses the need for soil disinfection in a context of limited farmland and fixed cropping systems, which make crop rotation difficult, while nematodes and fungal diseases increasingly threaten yields. The authorization—proposed by the Andalusian Agricultural Agency due to the lack of effective alternatives—is valid until February 11, 2026, and may only be applied within Huelva under strict supervision by regional authorities.

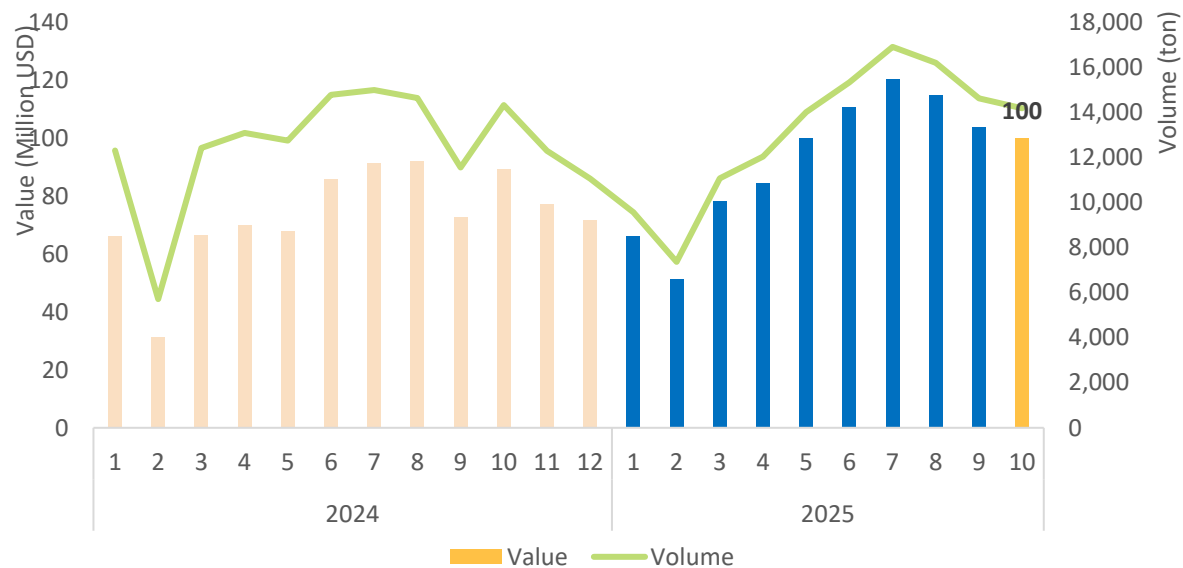
*Source: Freshplaza.com*





# CASHEW NUTS

## Export volume and value to the EU, Oct-2025



## Export results to the EU, Oct-2025

### VALUE

**100** mil. USD

⬇️ Decrease **3.5%** compared to Sep-2025

⬆️ Increase **12.1%** compared to Oct-2024

⬆️ **26.5 mil. USD** more than compared to monthly average in 2024

❖ Accumulated 10 months of 2025 reaches **929 mil.USD, 105%** of total 2024

### VOLUME

**14.2** thousand tons

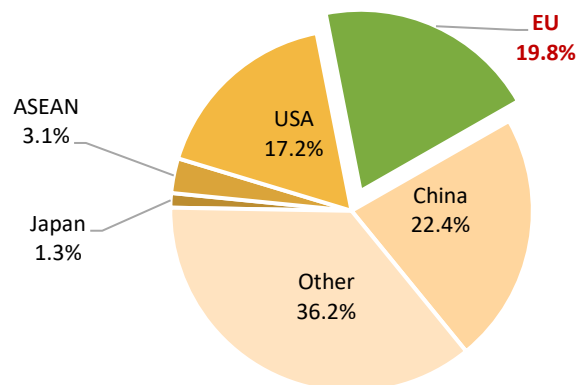
⬇️ Decrease **3.2%** compared to Sep-2025

⬇️ Decrease **1.1%** compared to Oct-2024

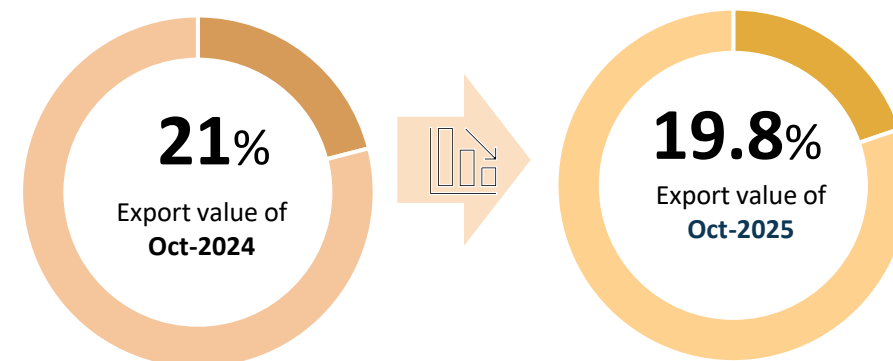
⬆️ **1.7 thousand tons** more than compared to monthly average in 2024

❖ Accumulated 10 months of 2025 reaches **131 thousand tons, 88%** of total 2024

## Percentage of export value to the EU, Oct-2025



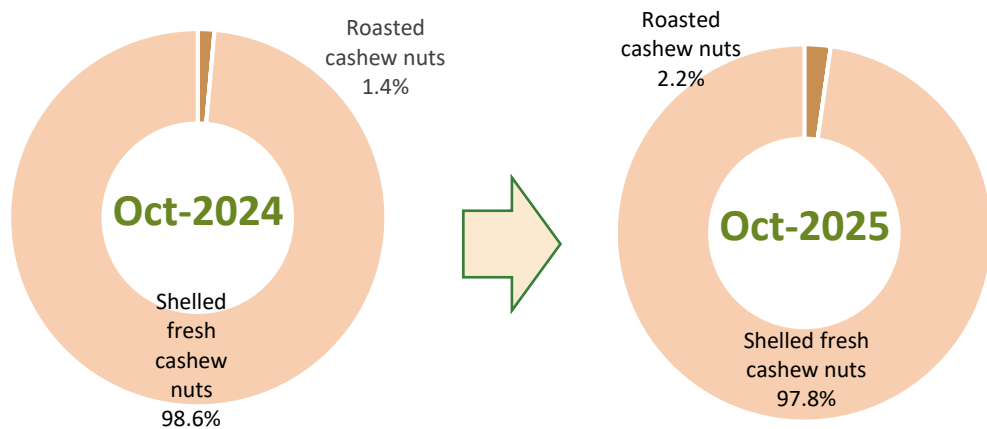
## Changes in percentage of export value to the EU, Oct-2025



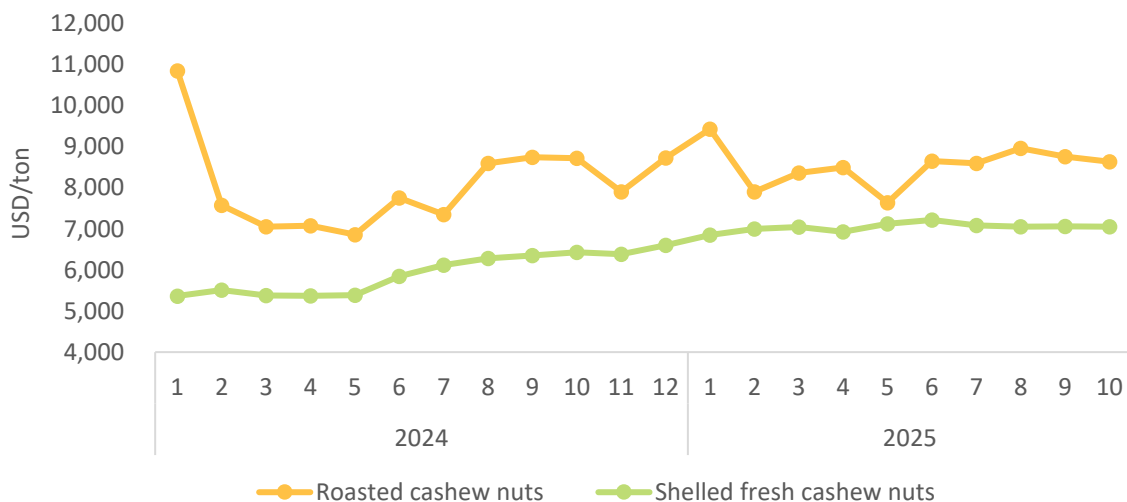


# CASHEW NUTS

## Structure of exports by products to the EU, Oct-2025



## Average export price to the EU, Oct-2025



## Export results to the EU, Oct-2025



### Shelled fresh cashew nuts

Value: **97.8** mil. USD

Decrease **2.6%** compared to Sep-2025

Increase **11.2%** compared to Oct-2024



### Roasted cashew nuts

Value: **2.2** mil. USD

Decrease **31.4%** compared to Sep-2025

Increase **76.5%** compared to Oct-2024

### Shelled fresh cashew nuts

The average export price in Oct-2025 is **7.049** USD/ton; decrease **0.15%** compared to the previous month; and increase **9.7%** compared to the same month of 2024.

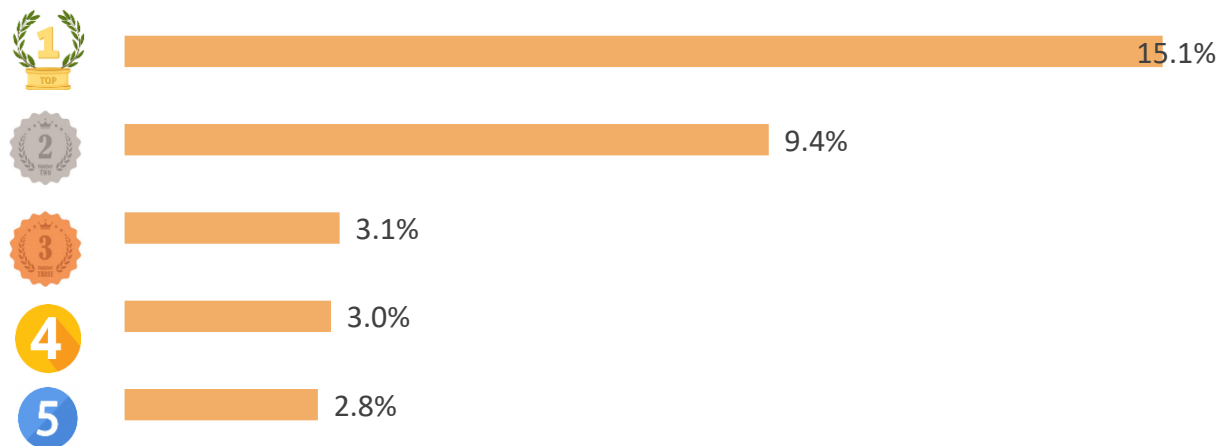
### Roasted cashew nuts

The average export price in Oct-2025 is **8.631** USD/ton; decrease **1.4%** compared to the previous month; and decrease **1.0%** compared to the same month of 2024.

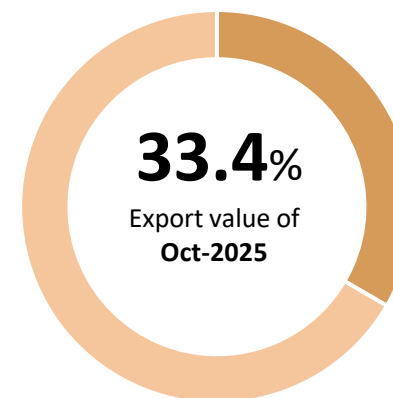


# CASHEW NUTS

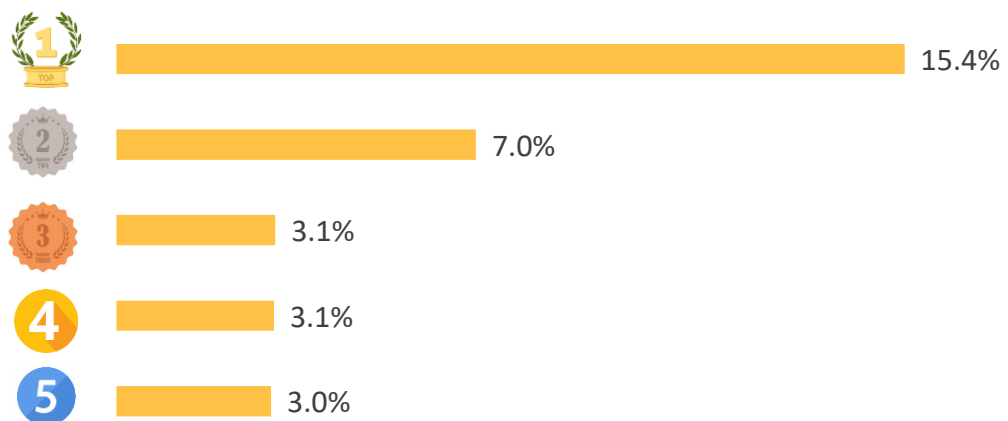
## TOP 5 export enterprises by value to the EU, Oct-2025



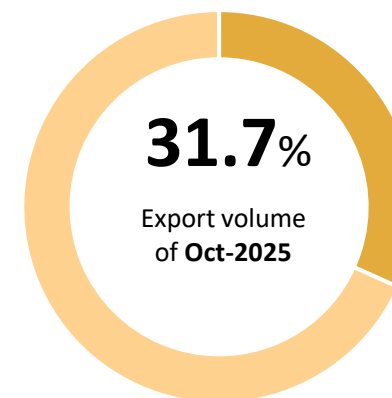
## Value ratio of TOP 5 export enterprises to the EU, Oct-2025



## TOP 5 export enterprises by volume to the EU, Oct-2025



## Volume ratio of TOP 5 export enterprises to the EU, Oct-2025





# CASHEW NUTS

## SPOTLIGHTS



### **Cambodia's cashew exports reach a new milestone in Germany**

Cambodia has achieved a significant milestone by exporting cashew nuts to Germany for the first time following its participation in the ANUGA 2025 trade fair, marking its initial presence in the EU market. HCST was one of eight companies selected to showcase products at the national pavilion organized by the Cambodian Ministry of Commerce in cooperation with the EU and Germany. Positive feedback from international buyers indicates that Cambodian cashews are increasingly recognized for their quality and traceability.

This is also Cambodia's second cashew shipment to the EU in 2025, following a 14-ton consignment to Italy in September. In the first 10 months of the year, Cambodia earned more than USD 807 million from cashew exports, a 60% increase year-on-year, demonstrating that the cashew industry is becoming one of the key growth drivers of the country's economy.

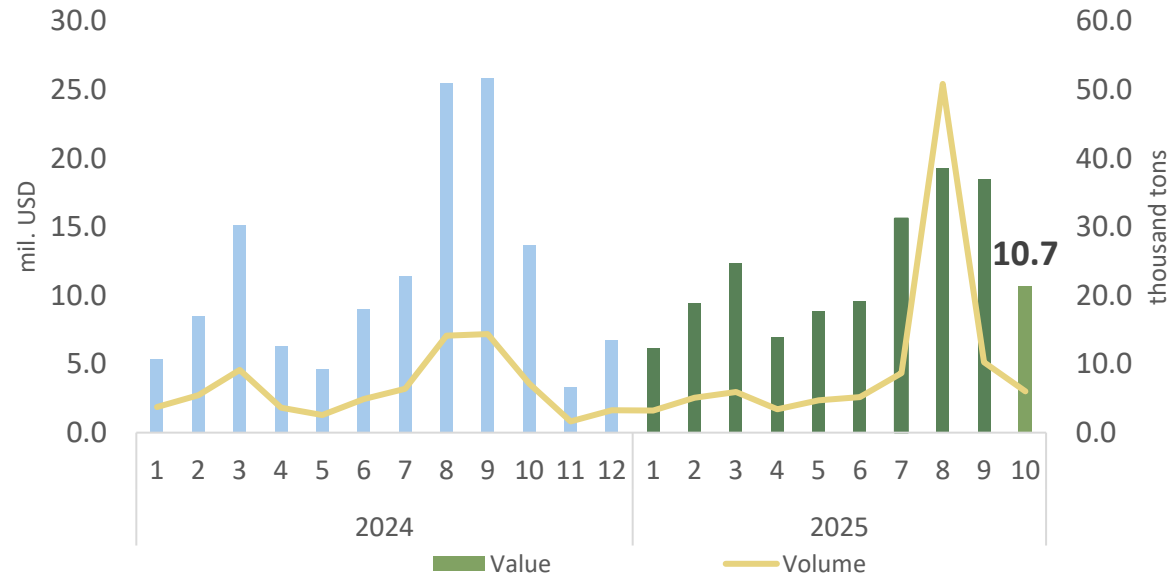
Source: [cambodianess.com](https://cambodianess.com)





# RUBBER

## Export volume and value to the EU, Oct-2025



## Export results to the EU, Oct-2025

### VALUE

**10.65** mil. USD

⬇️ Decrease **42.2%** compared to Sep-2025

⬇️ Decrease **27.9%** compared to Oct-2024

⬇️ **4.1 mil. USD** less than compared to monthly average in 2024

❖ Accumulated 10 months of 2025 reaches **117.3 mil. USD**, **66.1%** of total 2024

### VOLUME

**6.0** thousand tons

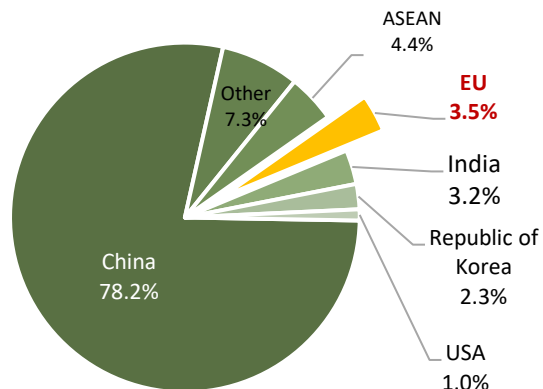
⬇️ Decrease **41.6%** compared to Sep-2025

⬇️ Decrease **21.5%** compared to Oct-2024

⬇️ **2.3 thousand tons** less than compared to monthly average in 2024

❖ Accumulated 10 months of 2025 reaches **103 thousand tons**, **103%** of total 2024

## Percentage of export value to the EU, Oct-2025



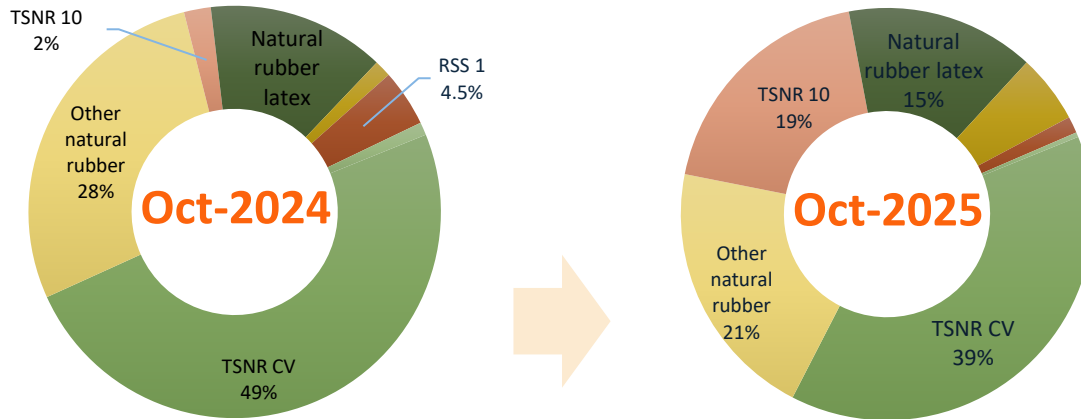
## Changes in percentage of export value to the EU, Oct-2025



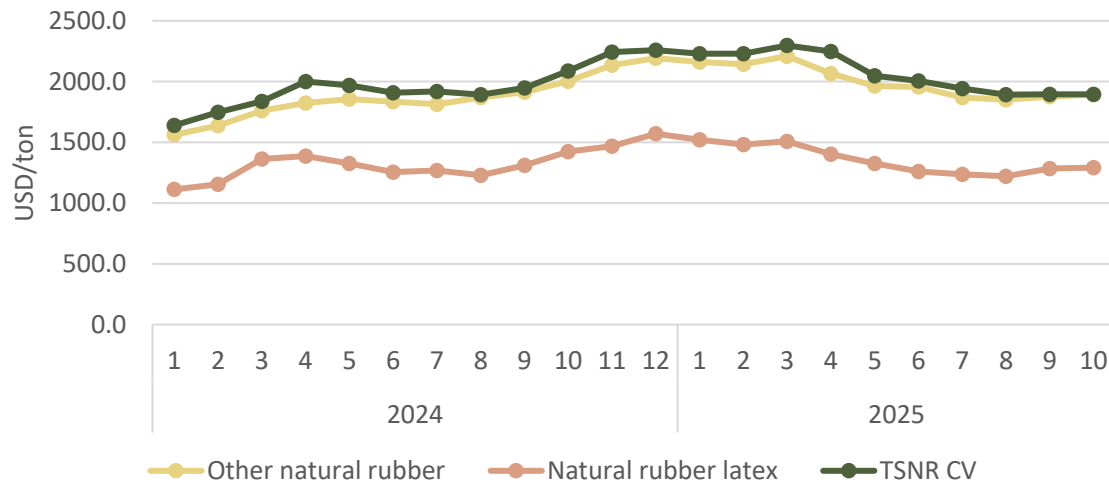


# RUBBER

## Structure of exports by products to the EU, Oct-2025



## Average export price to the EU, Oct-2025



## Export results to the EU, Oct-2025



### Other natural rubber

Value: **2.2** mil. USD

Decrease **58%** compared to Sep-2025

Decrease **42.5%** compared to Oct-2024



### TSNR CV

Value: **4.12** mil. USD

Decrease **51%** compared to Sep-2025

Decrease **39%** compared to Oct-2024



### Natural rubber latex

Value: **1.6** mil. USD

Decrease **29%** compared to Sep-2025

Decrease **17%** compared to Oct-2024

### Other natural rubber

The average export price in Oct-2025 is **1.892** USD/ton; **increase 0.8%** compared to the previous month; and **decrease 5.6%** compared to the same month of 2024.

### TSNR CV

The average export price in Oct-2025 is **1.895** USD/ton; **increase 0.1%** compared to the previous month; and **decrease 9.2%** compared to the same month of 2024.

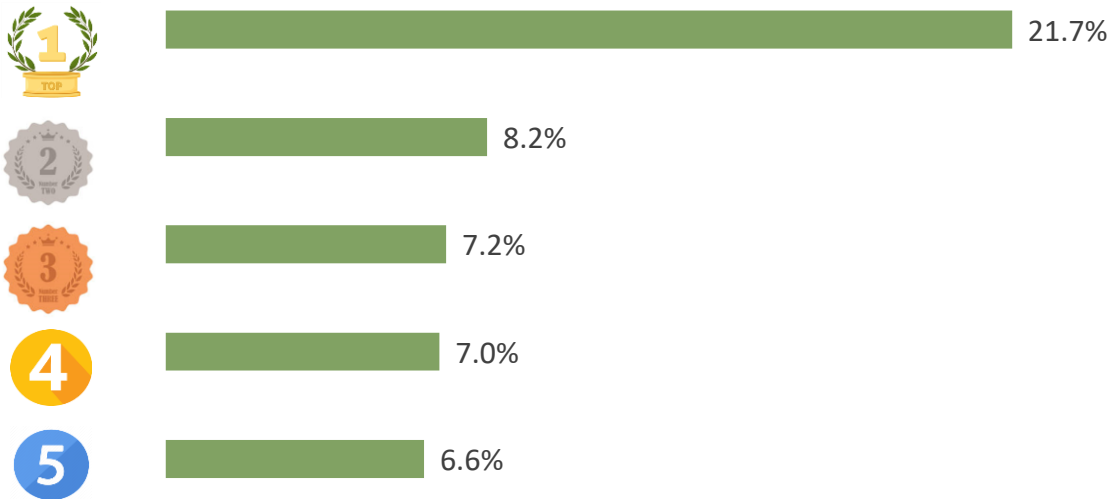
### Natural rubber latex

The average export price in Oct-2025 is **1.293** USD/ton; **increase 0.6%** compared to the previous month; and **decrease 9.2%** compared to the same month of 2024.



# RUBBER

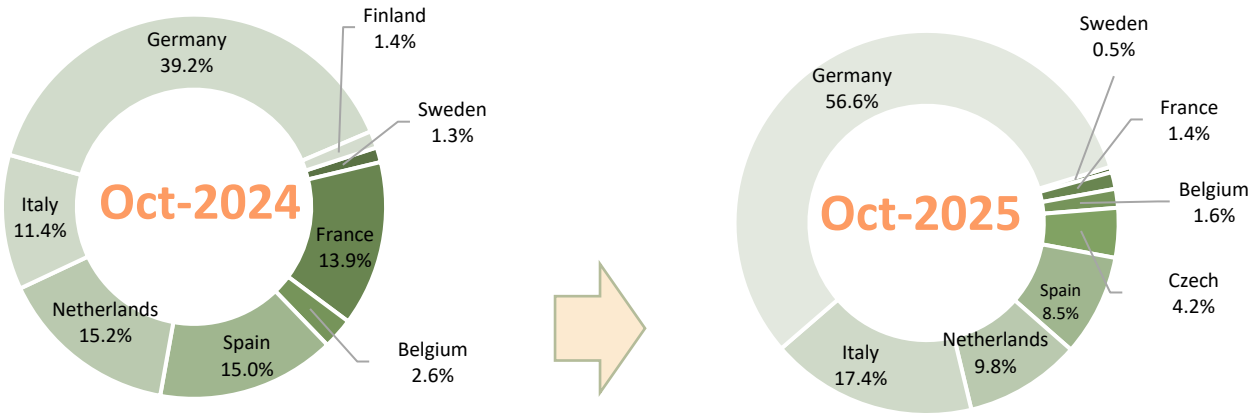
## TOP 5 export enterprises by value to the EU, Oct-2025



## Value ratio of TOP 5 export enterprises to the EU, Oct-2025



## Fluctuations in the proportion of Vietnam's rubber exports to some EU countries, Oct-2025





## SPOTLIGHTS

### Tay Ninh implements comprehensive measures to meet the EU's EUDR requirements

Tay Ninh Province is rolling out a series of coordinated measures to comply with the EU Deforestation Regulation (EUDR), ensuring that its rubber and wood products maintain Vietnam's advantage as a "low-risk" country when exporting to Europe. The province is focusing on developing an EUDR Adaptation Action Framework, standardizing and publicly disclosing forest maps as of December 31, 2020, updating rubber plantation maps and traceability data, and establishing a mechanism for data sharing with central authorities.

Provincial departments and agencies have been tasked with supporting rubber enterprises in certification, traceability, quality standards, trade promotion, and technology adoption. Local People's Committees are guiding farmers and cooperatives to update plantation information in line with EUDR requirements. The overarching goal is to ensure that Tay Ninh rubber fully meets EU regulations, avoids potential "yellow card" risks, and strengthens access to EU markets.

Source: [thuonghieucongluan.com.vn](http://thuonghieucongluan.com.vn)





For feedback, please send to:

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