



ISPAE

Volume 11/2025

MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

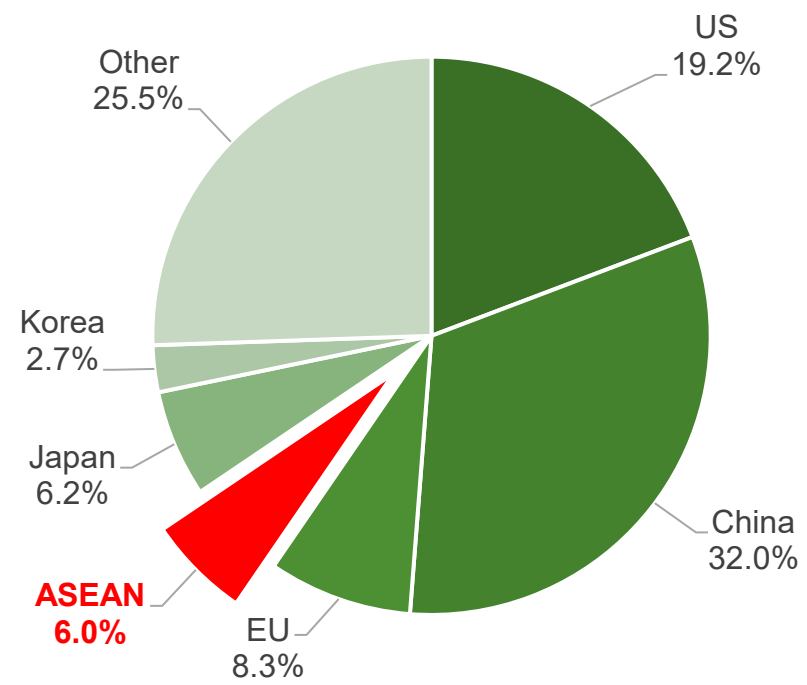
FROM VIETNAM TO **ASEAN**



Thực hiện bởi: **AGREINFOS**

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

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



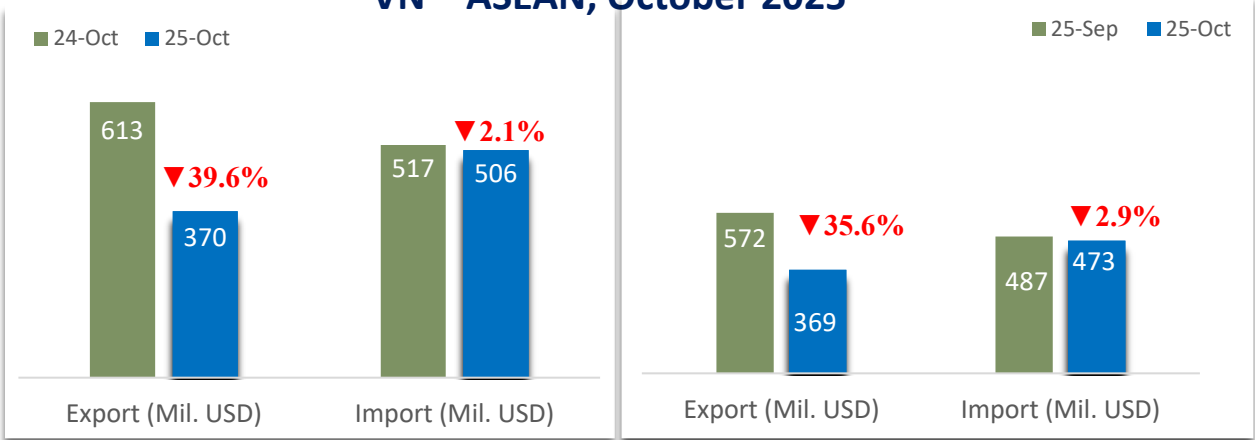
Changes in export proportion of AFF product to ASEAN Oct 25 compare to Oct 25 and Oct 24

Market	Volume (Mil.USD)	compare to Oct 25	compare to Oct 24
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 AFF Export (million USD)			6.159

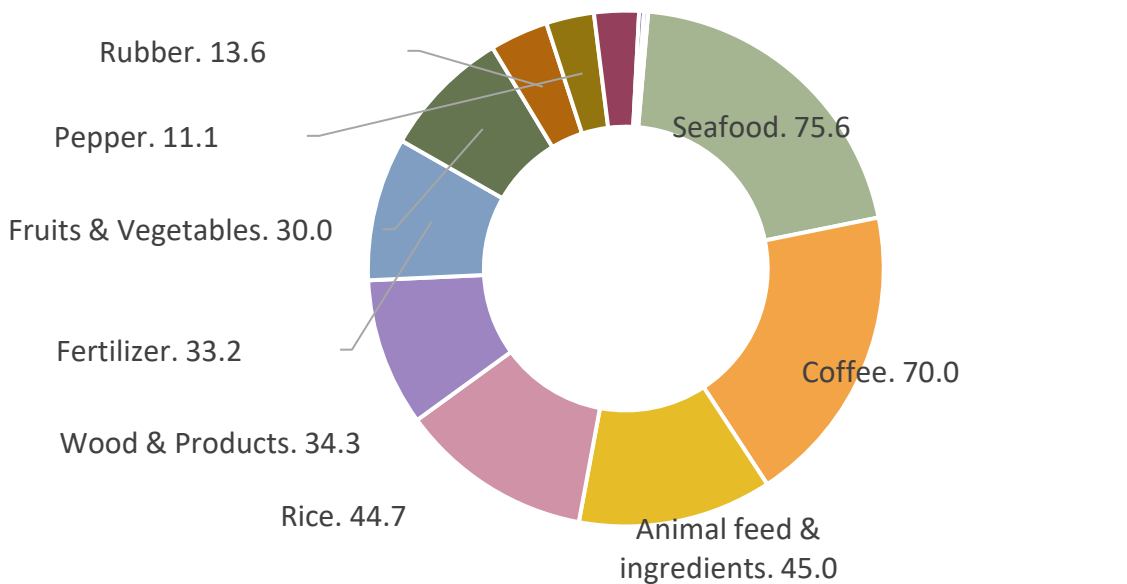
Nguồn: Tổng hợp từ số liệu của Cục Hải quan

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

AFF product import-export turnover between
VN – ASEAN, October 2025



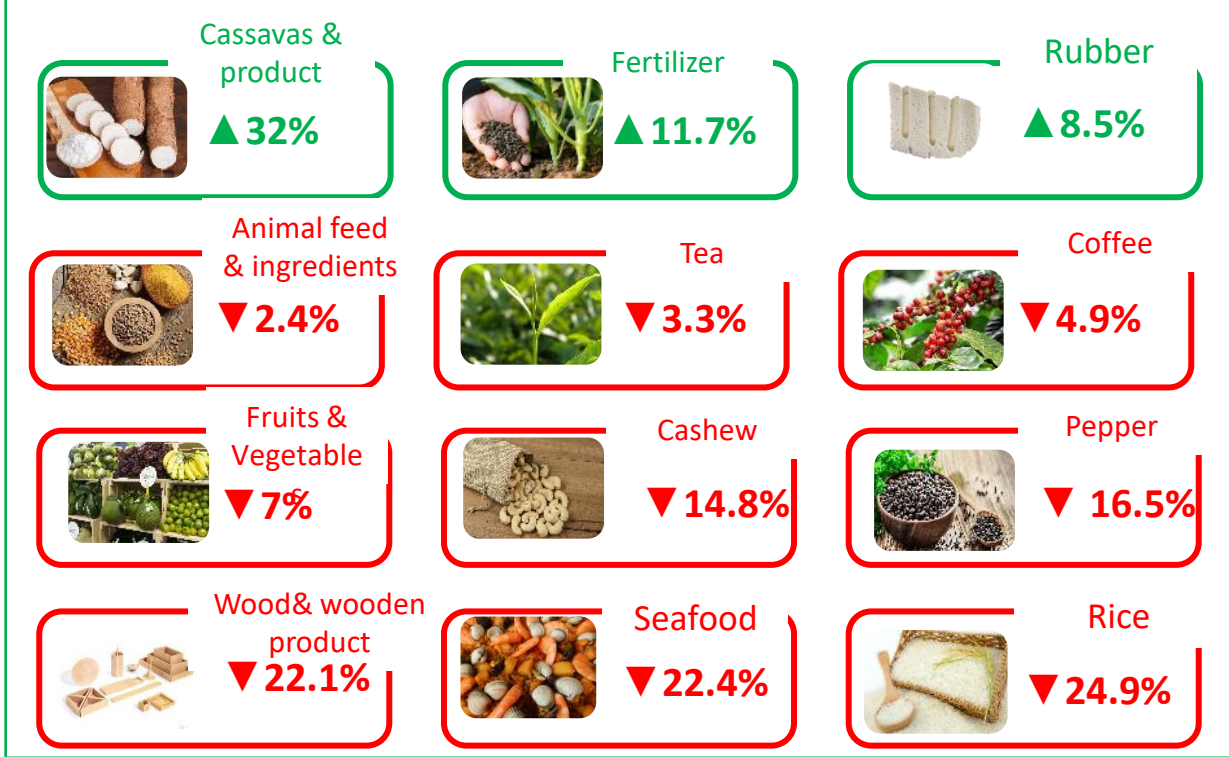
Key AFF product export Value to ASEAN, October 2025



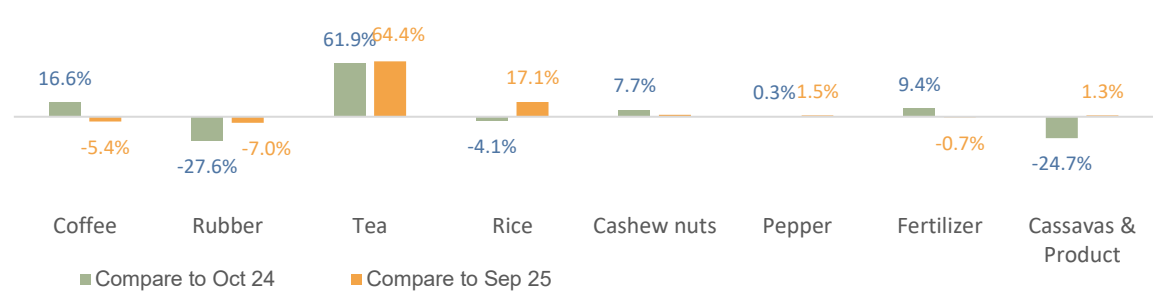
Source: Vietnam Customs

Unit: Million USD

Changes in key AFF product export Value to
ASEAN in Oct 25 compared to Oct 25



Changes in average export Value of key AFF products
To ASEAN in Oct 25 compared to Oct 24 and Oct 25



ACFTA 3.0 enhances economic collaboration between ASEAN and China.



ACFTA 3.0 enhances economic collaboration between ASEAN and China.

China-ASEAN relations are currently regarded as being at their "most favorable stage in history," with collaboration extending into new domains such as the digital economy, digital infrastructure, green economy, and artificial intelligence, all grounded in trust and dynamic exchanges. For five consecutive years, the two parties have been each other's largest trading partners, with China also serving as a significant investor in ASEAN. Additionally, tourism has rebounded robustly following the COVID-19 pandemic. The ACFTA 3.0 Upgrade Protocol introduces numerous new regulations concerning trade in goods and services and supports emerging economic sectors, thereby enhancing institutional compatibility and fostering a transparent and stable cooperative environment. This, in turn, establishes a vital foundation for businesses on both sides to strengthen collaboration and promote shared growth within the region.

Source: aseanvietnam.vn

ASEAN enhances collaboration and broadens economic connections to address global instability.



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ASEAN is enhancing economic cooperation and integration to address global uncertainties, particularly in trade. The region is advised to strengthen rules of origin, eliminate transshipment loopholes, and promptly adjust trade directions, while effectively implementing significant FTAs such as ATIGA, RCEP, and the DEFA digital economic framework to boost intra-regional supply, lower costs, and facilitate trade. Concurrently, ASEAN is diversifying its partnerships with China, Japan, South Korea, the EU, and Latin America, thereby attracting resources to broaden growth opportunities.

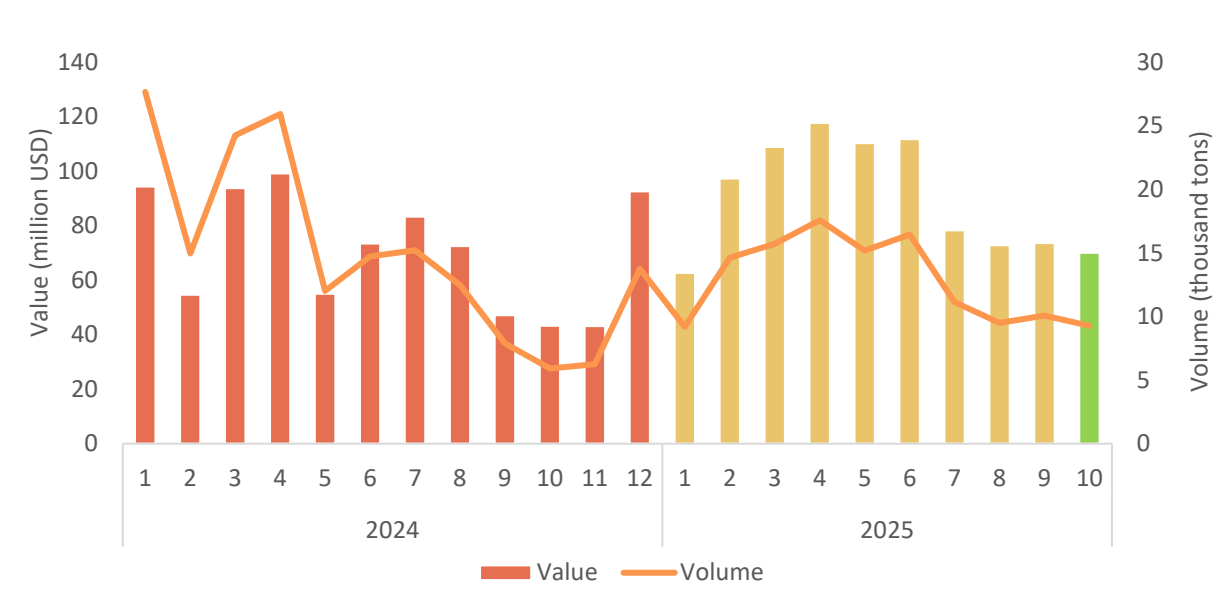
Source: aseanvietnam.vn



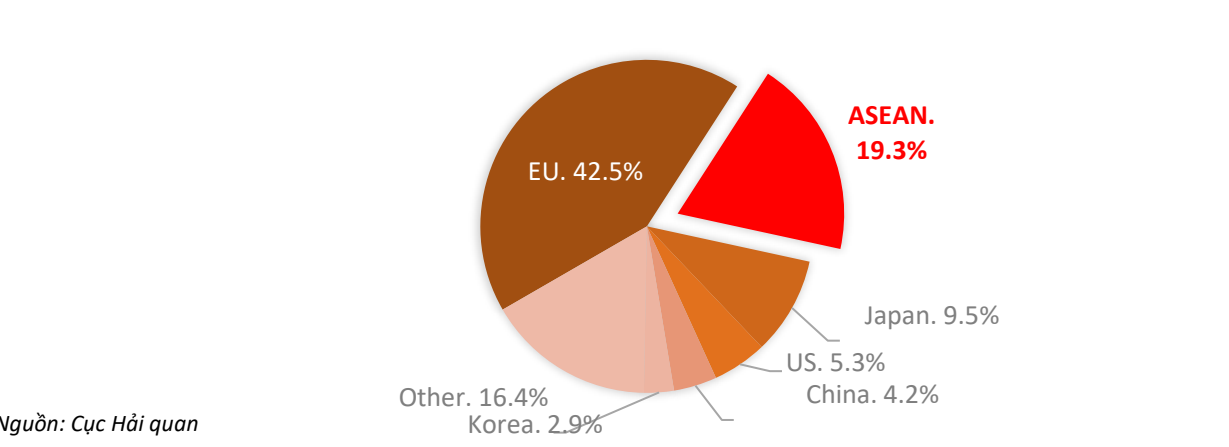


COFFEE

Export volume and value to ASEAN, Oct-2025



Percentage of export value to ASEAN, Oct-2025



Export results to ASEAN, Oct-2025

VALUE

70 million USD

↘ Decrease **4.9%** compare to Oct 25

↗ Increase **61.8%** compare to Oct 24

↘ **1** million USD less than the monthly average rate in 2024.

❖ Accumulated 10 months of 2025 reaches **903.2** Mil.USD, the rate is **106%** of the total in 2024.

VOLUME

9.3 thousand tons

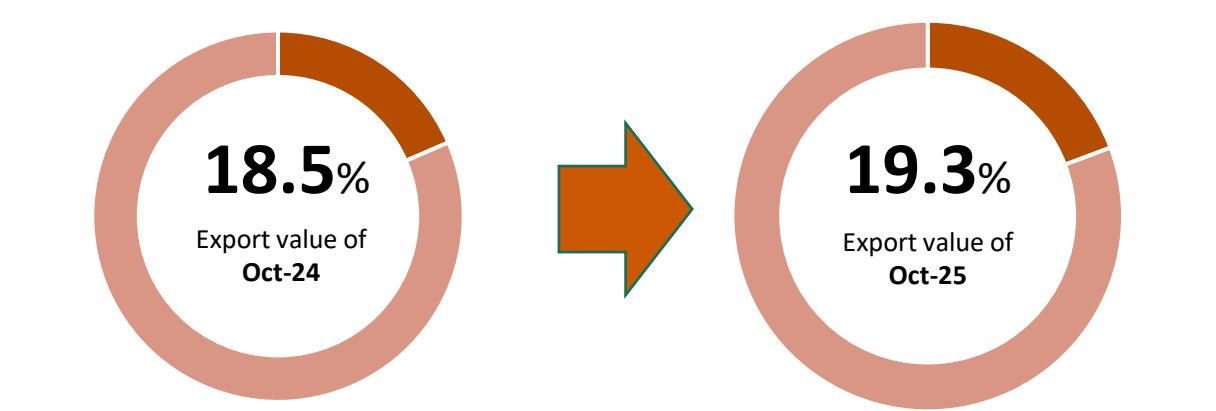
↘ decrease **8%** compare to Oct 25

↗ increase **56.8%** compare to Oct 24

↘ **5.8** thousand tons lower than the monthly average rate in 2024.

Accumulated 10 months of 2025 reaches **128.7** thousand tons, the rate is **71.1%** of the total in 2024..

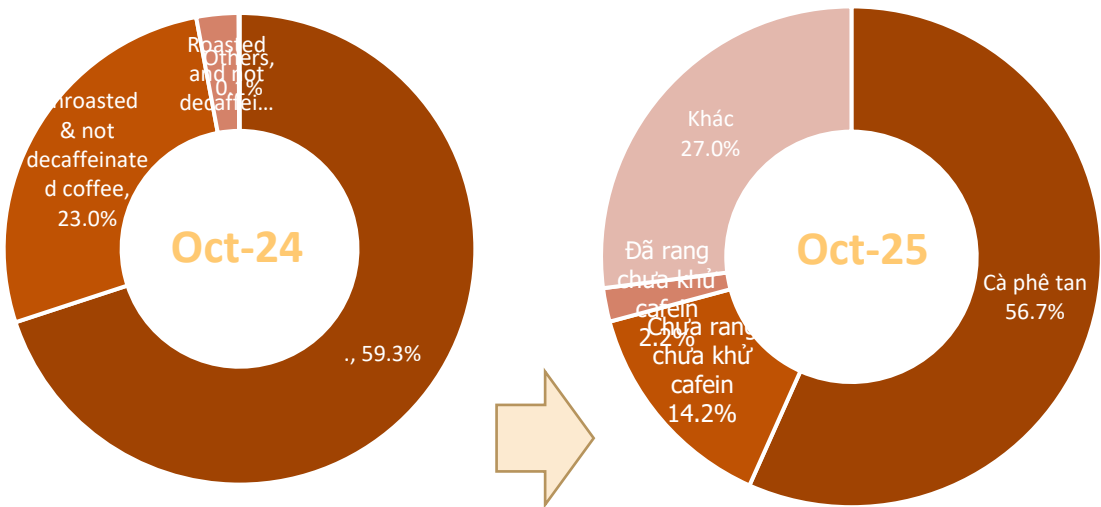
Changes in percentage of export value to ASEAN, Oct-2025



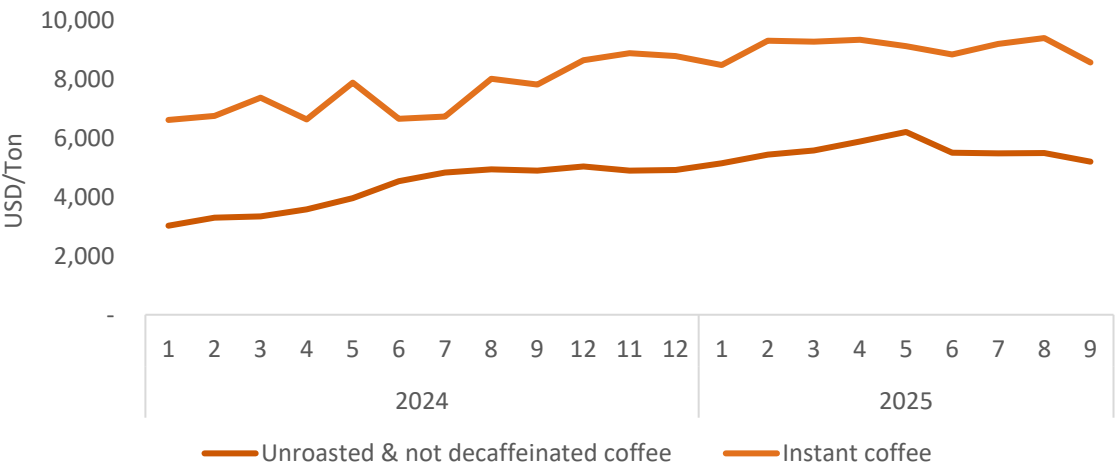


COFFEE

Structure of exports by products to ASEAN, Oct-2025



Average export price to ASEAN, Oct-2025



Export results to ASEAN, Oct-2025



Unroasted & not decaffeinated coffee

Value : **9.3** Million USD
Decrease **37.5%** compare to Oct 25
Increase **3%** compare to Oct 24



Instant coffee

Value : **37.2** Million USD
Decrease **5.7%** compare to Oct 25
Increase **3%** compare to Oct 24



Others

Value : **17.7** Million USD
Decrease **1.9%** compare to Oct 25
Increase **200%** compare to Oct 24

Instant coffee

The average export price in Oct-25 is **9.769** USD/ton. Increase **14%** compare to the previous month, and Increase **13%** compare to the same month in 2024.

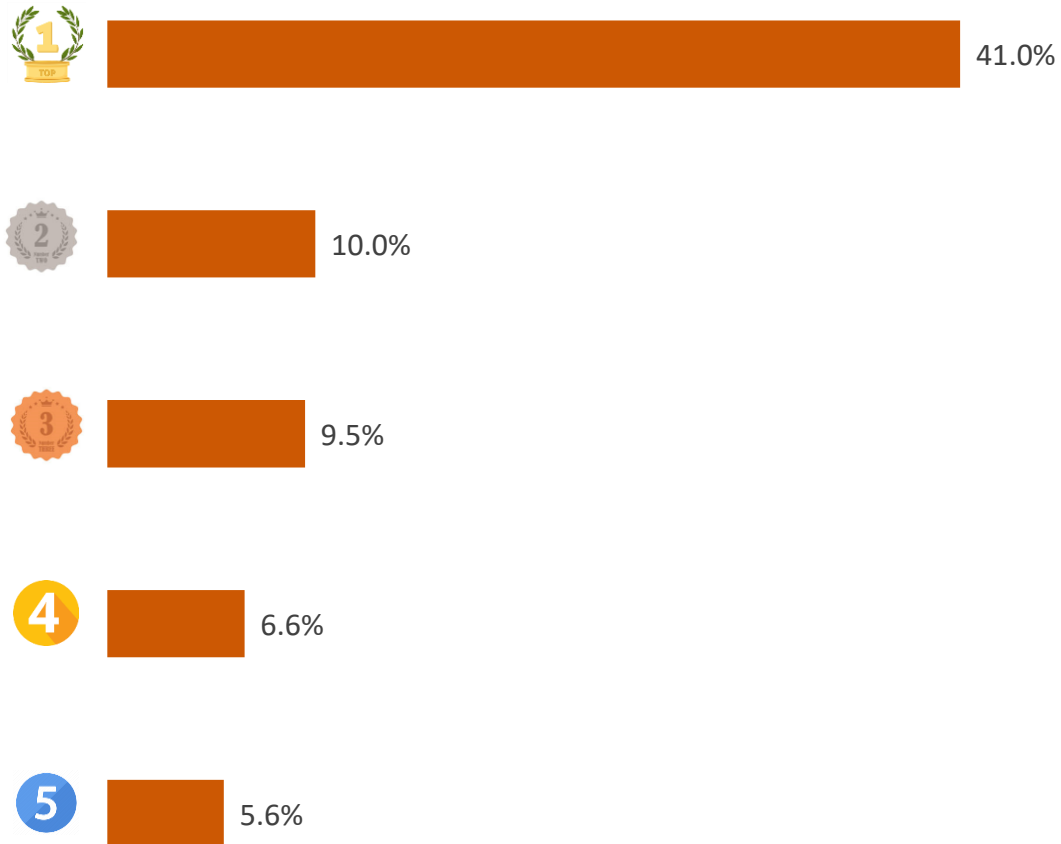
Unroasted & not decaffeinated coffee

The average export price in Oct-25 is **5.242** USD/ton. Increase **0.8%** compare to the previous month, and Increase **4.3%** compare to the same month in 2024.

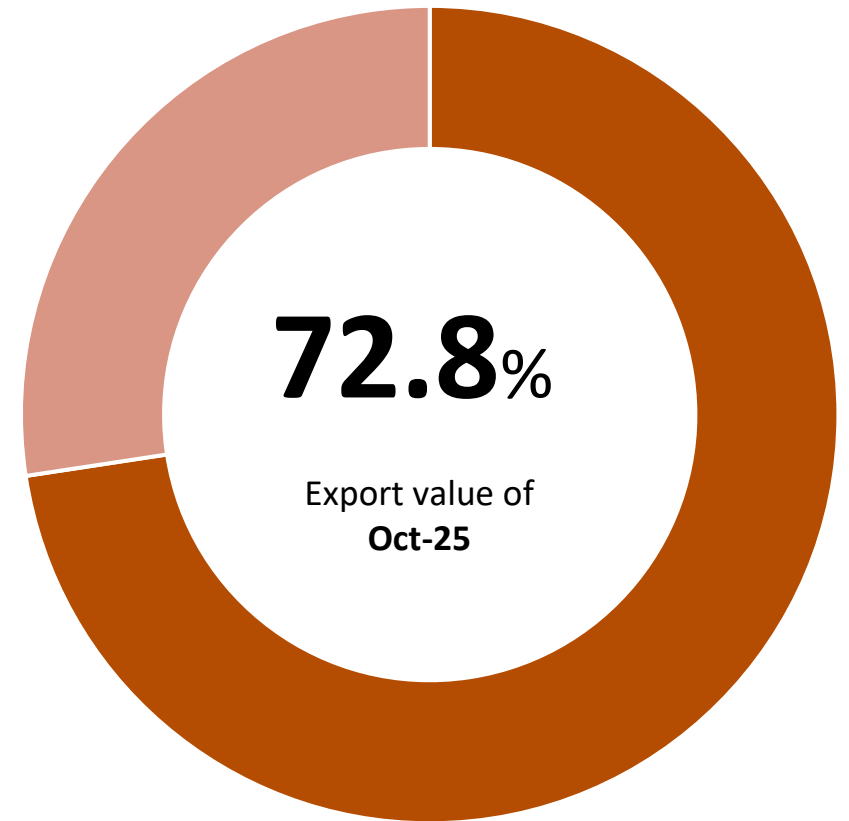


COFFEE

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



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





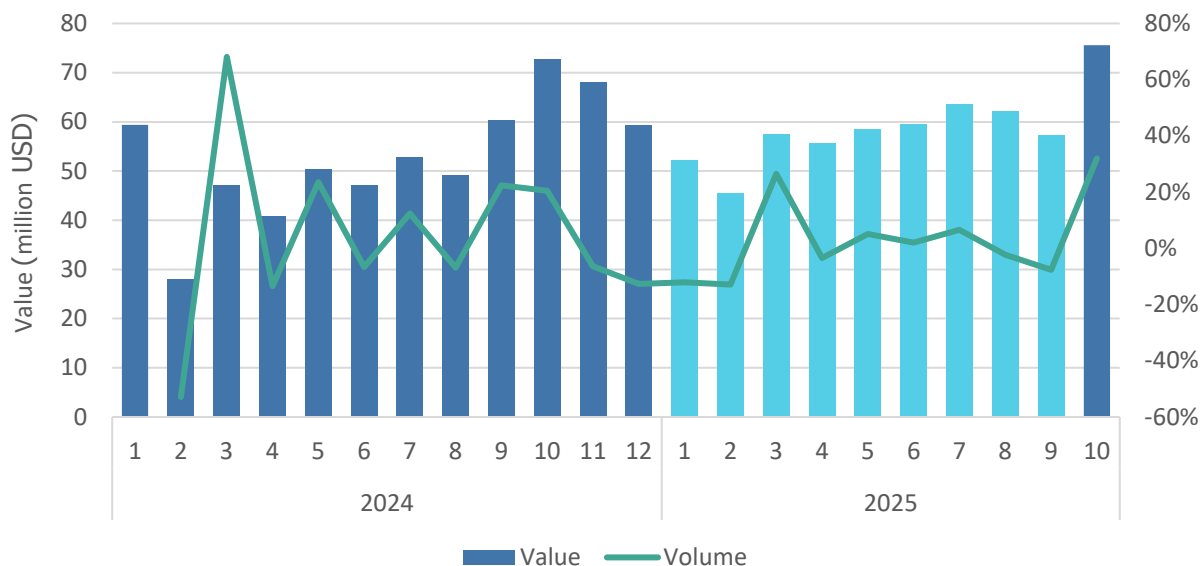
Laos is advocating for coffee as a sustainable rural livelihood and an alternative to opium poppy cultivation. In Huaphan province, 800 hectares have been converted to coffee production, resulting in the export of 12 containers between 2021 and 2025, valued at over US\$1.37 million, while also providing support to 100 opium growers through the Lao Opium Alternative Project. From 2017 to 2025, farmers will receive high-quality coffee seeds, organic fertilizers, nursery equipment, and technical training, alongside the establishment of roasting facilities, drying yards, and water tanks to enhance quality and market access. The Lao government will also collaborate with development partners to offer training in production, processing, packaging, and marketing skills, as well as to organize promotional events such as the International Coffee and Tea Day 2025.



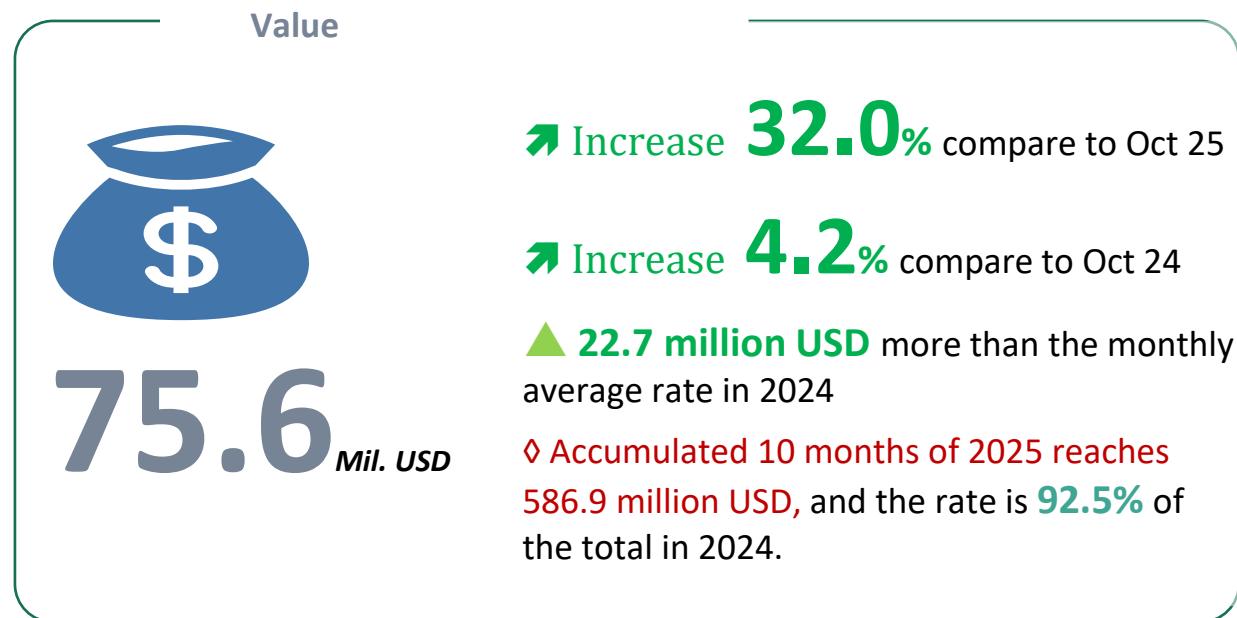


FISHERIES

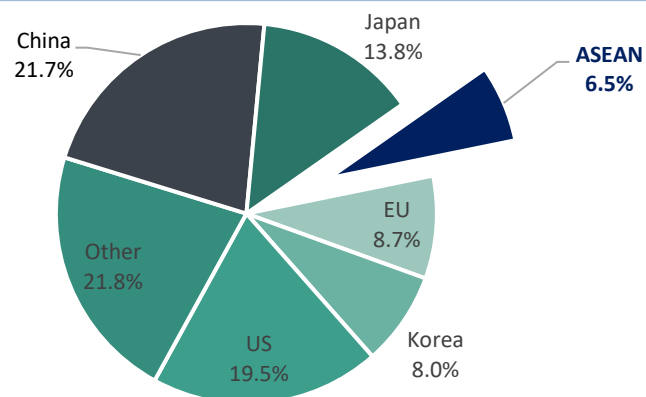
Export value to ASEAN, Oct-2025



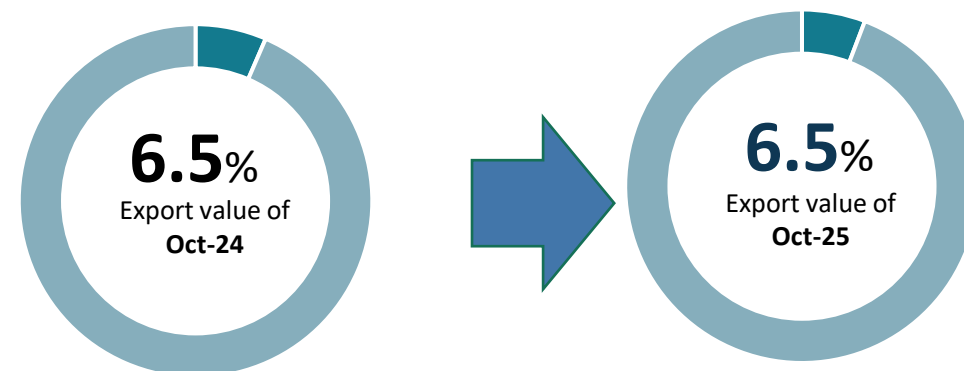
Export results to ASEAN, Oct-2025



Percentage of export value to ASEAN, Oct-2025



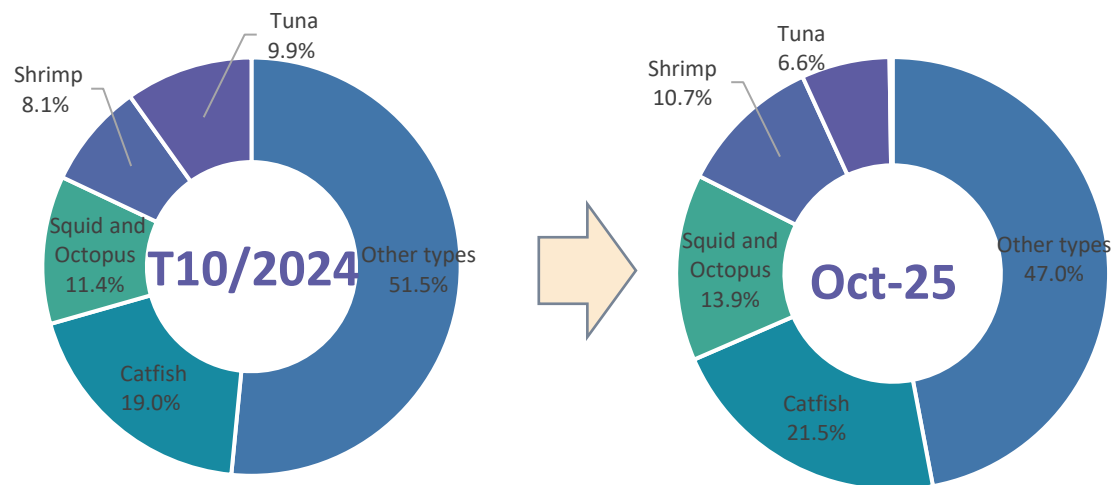
Change in percentage of export to ASEAN, Oct-2025



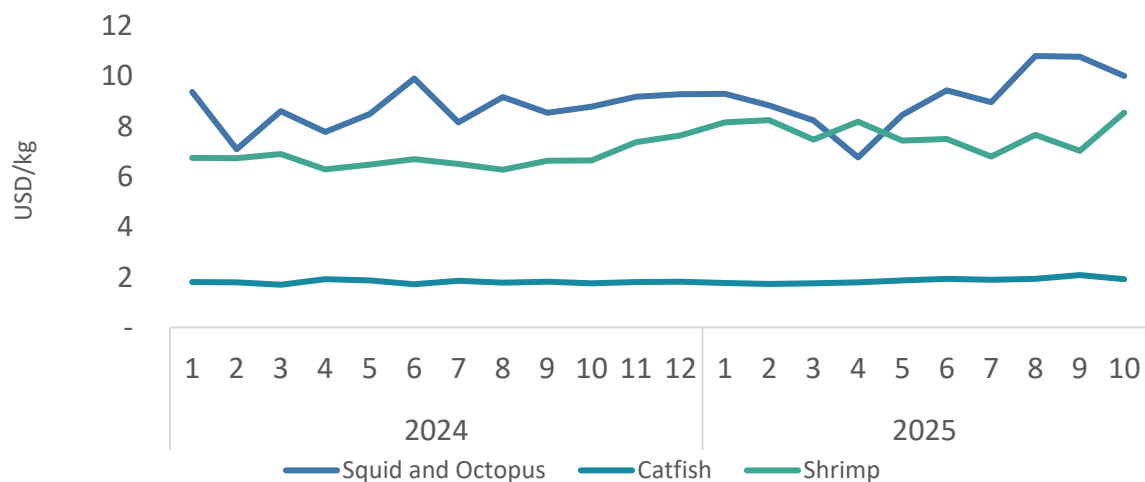


FISHERIES

Structure of exports by products to ASEAN, Oct-2025



Average export price to ASEAN, Oct-2025



Export results to ASEAN, Oct-2025



Catfish

Value: **16.2** Million USD

Increase **20.6%** compare to Oct 25

Increase **17.5%** compare to Oct 24



Squid & Octopus

Value: **10.5** Million USD

Increase **4.3%** compare to Oct 25

Increase **26.9%** compare to Oct 24



Shrimp

Value: **8.5** Million USD

Increase **47.7%** compare to Oct 25

Increase **37.8%** compare to Oct 24

Squid & Octopus

The average export price in Oct-25 is **10.0** USD/kg; **Decrease 7.1%** compare to the previous month; and **Increase 14.0%** compare to the same month in 2024.

Catfish

The average export price in Oct-25 is **1.9** USD/kg; **Decrease 7.1** compare to the previous month; and **Increase 10.0%** so compare to the same month in 2024.

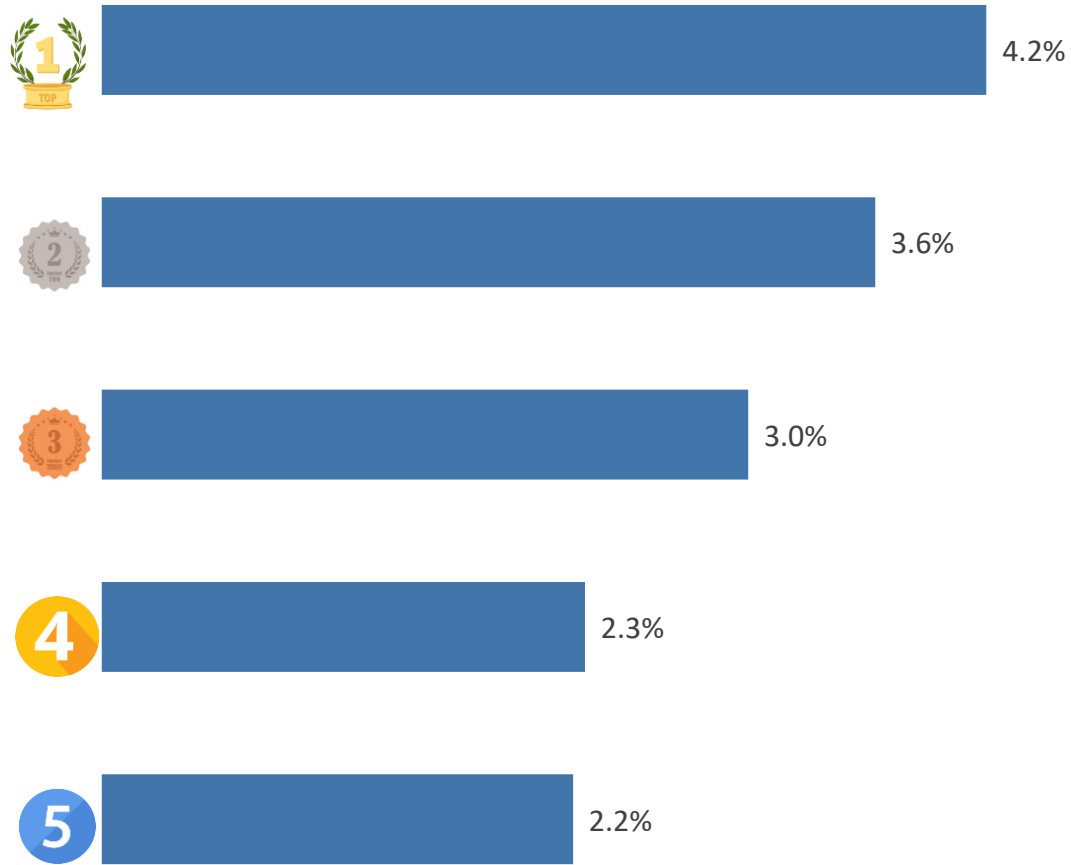
Shrimp

The average export price in Oct-25 is **8.5** USD/kg; **Increase 21.7%** compare to the previous month; and **Increase 28.7%** so compare to the same month in 2024.

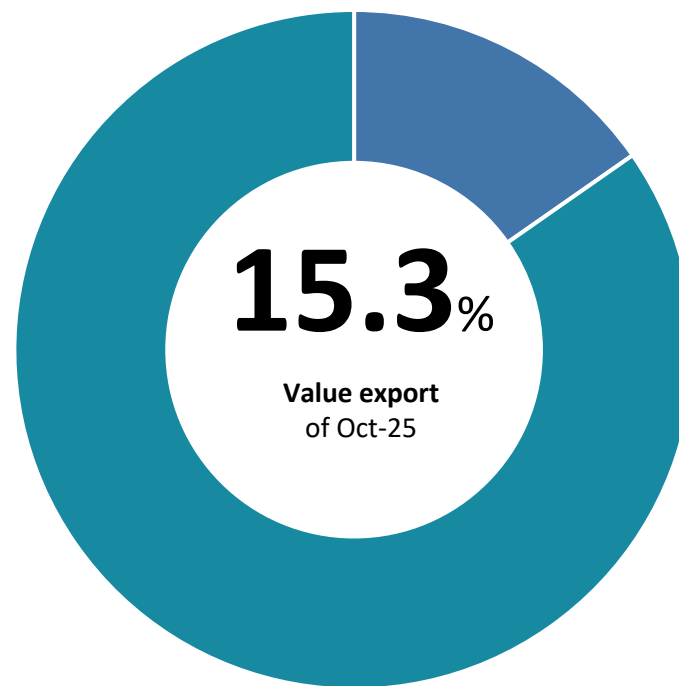


THỦY SẢN

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



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



01

Indonesia has resumed shrimp exports to the United States following the Cesium-137 contamination incident.

Indonesia has recommenced shrimp exports to the United States, with the initial 121 containers successfully passing Cesium-137 radiation testing, as reported by the Cesium-137 Task Force. The United States mandates that shrimp shipments from Indonesia's "yellow list" regions, including Java and Lampung, possess a "radiation-free" certificate issued by the Indonesian Ministry of Fisheries and Maritime Affairs (KKP) in accordance with FDA regulations. Indonesia maintains that its existing monitoring, inspection, and certification system guarantees the product's safety and compliance with the requirements for ongoing export. However, two companies, PT Bahari Makmur Sejahtera (BMS) and PT NJS, remain on the "red list" due to their prior exports of radioactive products. These companies may resume exports only upon obtaining third-party certification recognized by the FDA. The Indonesian government is contemplating the selection of an independent assessment organization to assist these companies in reinstating their export activities.



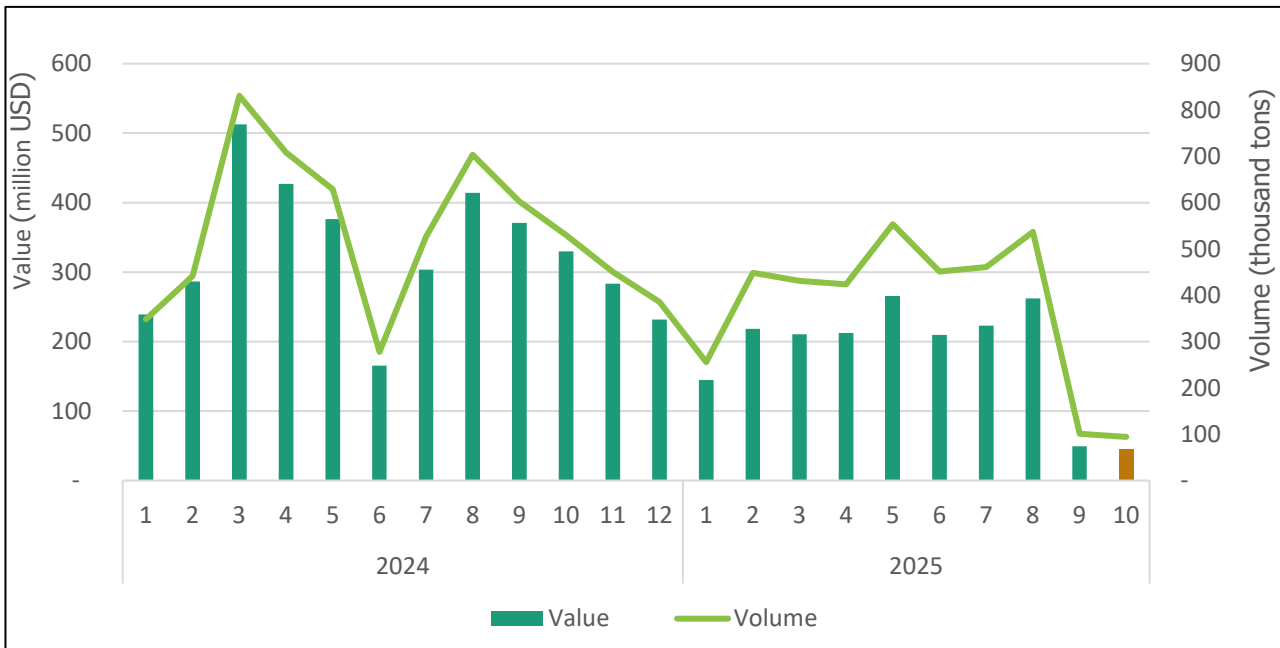
Source: Rhythm



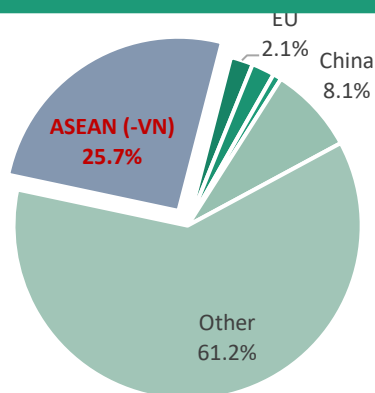


RICE

Export volume and Value to ASEAN, Oct-2025



Percentage of export Value to ASEAN, Oct-2025



Export results to ASEAN, Oct-2025

VALUE
45.5 million USD

↘ Decrease **8.1%** compare to Oct-25

↘ Decrease **86.2%** compare to Oct 24

↘ **282.8 million USD** less than the monthly average rate in 2024

◇ Accumulated 10 months of 2025 reaches **1.8 billion USD**, and the rate is **45.5%** of the total in 2024.

VOLUME
94.2 thousand tons

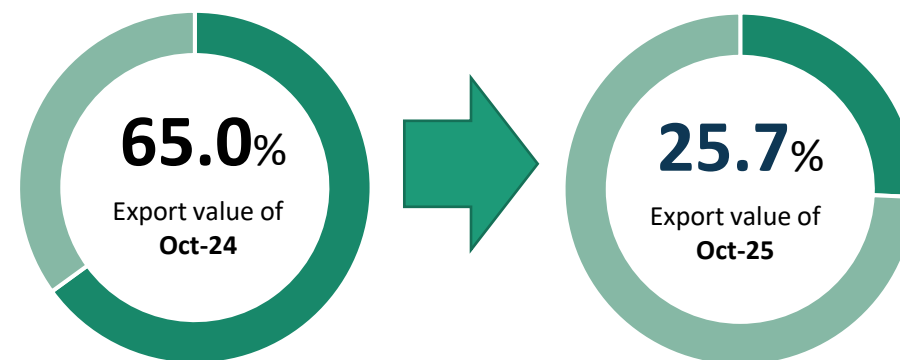
↘ Decrease **6.3%** compare to Oct-25

↘ Decrease **82.2%** compare to Oct 24

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

◇ Accumulated 10 months of 2025 reaches **3.6 million tons**, and the rate is **56.4%** of the total in 2024.

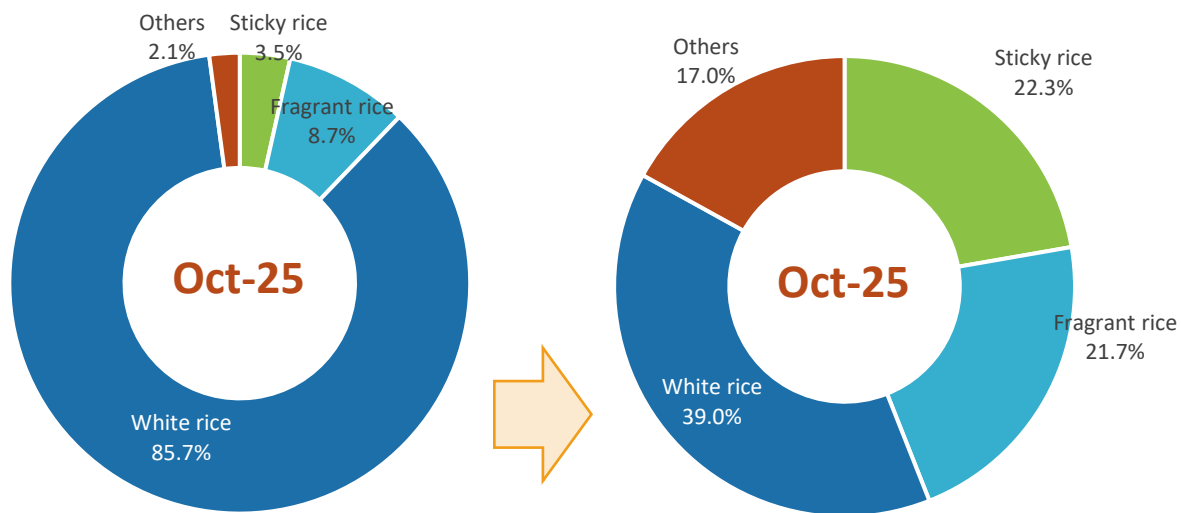
Changes in the percentage of export Value to ASEAN, Oct-2025





RICE

Structure of exports by products to ASEAN, Oct-2025



Export results to ASEAN, Oct-2025



White rice

Value: **10.2** million USD

Decrease **35** compare to Oct-25

Decrease **12%** compare to Oct-24



Fragrant Rice

Value: **9.9** million USD

Decrease **6%** compare to Oct-25

Decrease **65%** compare to Oct-24



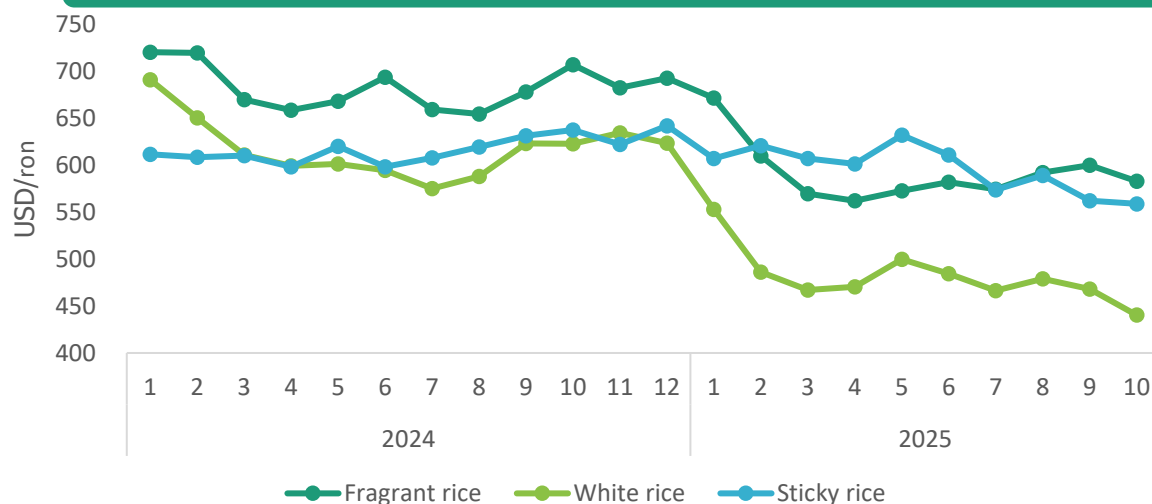
Sticky Rice

Value: **17.8** million USD

Increase **11%** compare to Oct-25

Decrease **94%** compare to Oct-24

Average export price to ASEAN, Oct-2025



Sticky rice

The average export price in Oct-25 is **559** USD/ton; **Decrease 1%** compare to the previous month; and **Decrease 12%** compare to the same month in 2024.

Fragrant rice

The average export price in Oct-25 is **583** USD/ton; **decrease 3%** compare to the previous month; and **Decrease 18%** compare to the same month in 2024.

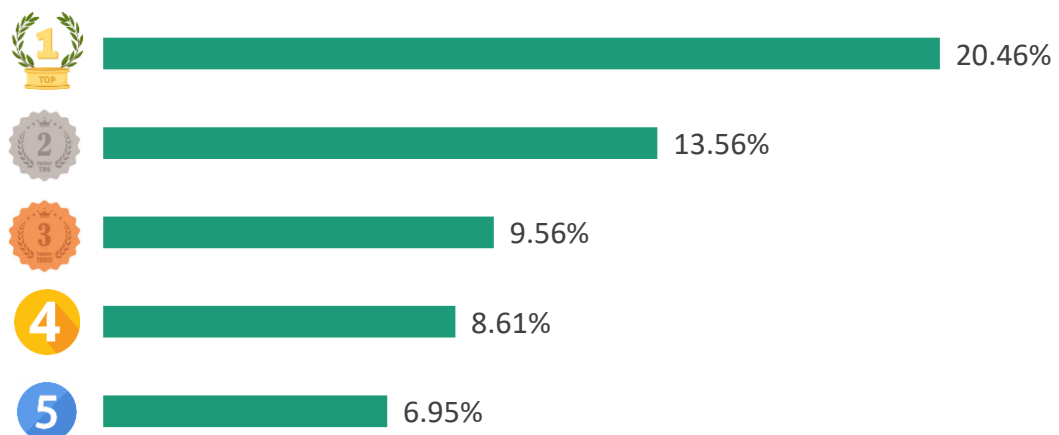
White rice

The average export price in Oct-25 is **440** USD/ton; **decrease 6%** compare to the previous month; and **Decrease 29%** compare to the same month in 2024.

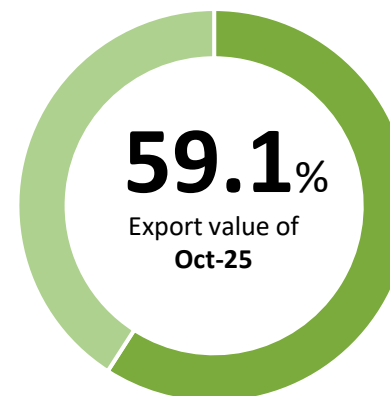


RICE

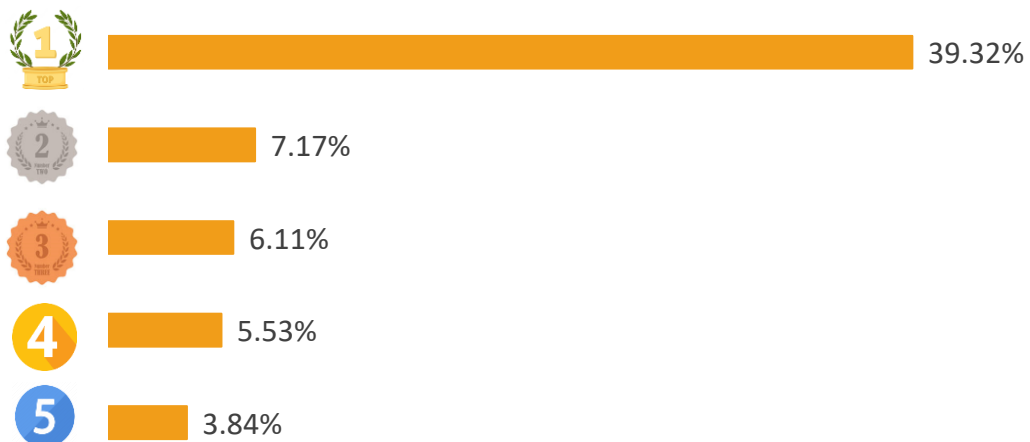
Top 5 export enterprises by Value to ASEAN, Oct-25



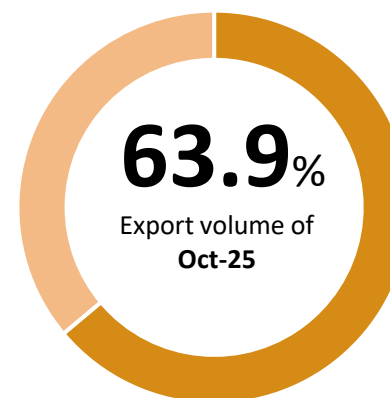
Value ratio of Top 5 export enterprise to ASEAN, Oct-25



Top 5 export enterprises by volume to ASEAN, Oct-25



Volume ratio of Top 5 export enterprise to ASEAN, Oct-25





RICE

SPOTLIGHT

01



The Philippine government is advancing its “P20 Benteng Bigas” rice price stabilization initiative, which offers rice at PHP20 per kilogram, through a newly implemented registration system designed for more efficient management and distribution. This system will establish a comprehensive, centralized, and current list of beneficiaries, enabling the Department of Agriculture (DA) to ensure that subsidies are delivered to the appropriate recipients in a timely manner. The new system is currently being piloted in 13 provinces and will be extended to all 81 provinces across the nation. Under President Marcos’ leadership, the initiative is set to continue until the conclusion of his term in June 2028, aiming to reach and support 15 million Filipino families from vulnerable and marginalized communities. The expansion of the price stabilization program is supported by a robust domestic rice supply. Statistics indicate that the total national rice reserves as of October 1, 2025, reached 2.35 million tons, reflecting a year-on-year increase of 3.2% and a month-on-month rise of 13.6%. Concurrently with the execution of the price support program, the government is prioritizing the implementation of long-term strategies to modernize the supply chain. Specifically, the Ministry of Agriculture aims to finalize the construction of 27 new rice processing facilities by the end of this year. These facilities, funded by the PHP30 billion (US\$510,187) Rice Competitiveness Enhancement Fund mechanization program, are anticipated to alleviate the deficiencies in drying and milling infrastructure, thereby enhancing post-harvest efficiency for smallholder farmers.





02

The Indonesian government has reiterated its policy to prohibit rice imports in 2025 following the discovery and seizure of a shipment containing 250 tons of smuggled rice from Thailand in Sabang, Aceh. This firm position arises as Indonesia has attained food self-sufficiency, with domestic production projected to reach 34.7 million tons and rice reserves in the warehouses of the National Logistics Agency (Bulog) amounting to 3.8 million tons. Coordinating Minister for Economic Affairs Zulkifli Hasan emphasized that the government has not granted any permissions for rice imports this year and initiated an investigation immediately upon receiving information regarding the smuggled shipment on November 13, 2025. The situation escalated when Indonesian Agriculture Minister Andi Amran Sulaiman disclosed irregularities in the process. According to the minutes from a government coordination meeting held on November 14, the request to import the shipment was denied by the appropriate officials. Nevertheless, the permit was granted by the Thai authorities, indicating that the shipment was arranged outside of official protocols. At present, the 250-ton shipment has been sealed, and an investigation is underway. This incident took place in Aceh province, which has a rice surplus of 871,400 tons this year.





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Oct-25



Export results to the ASEAN, Oct-25

KIM NGẠCH

31.9

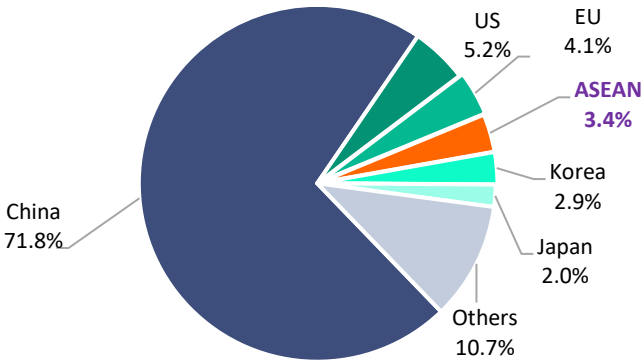
Mil. USD

Increase **7.5%** compare to Oct-25

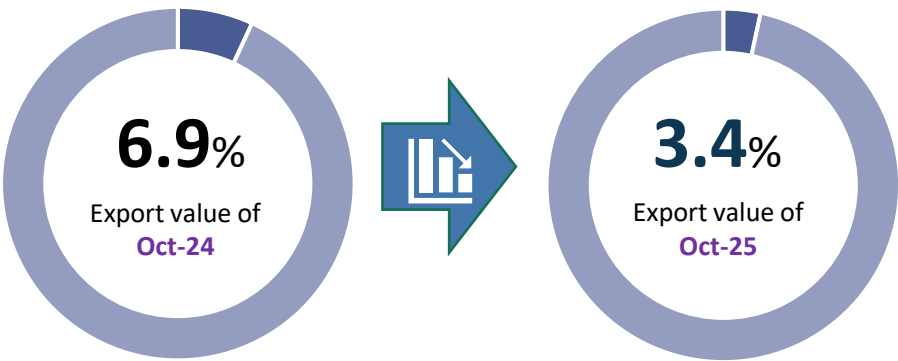
Decrease **11.5%** compare to Oct-24
4.5 million USD less than the monthly average rate in 2024

Accumulated 10 months of 2025 reaches **289.3 million USD**, and the rate is **66.2%** of the total in 2024.

Percentage of export value to the ASEAN, Oct-25



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

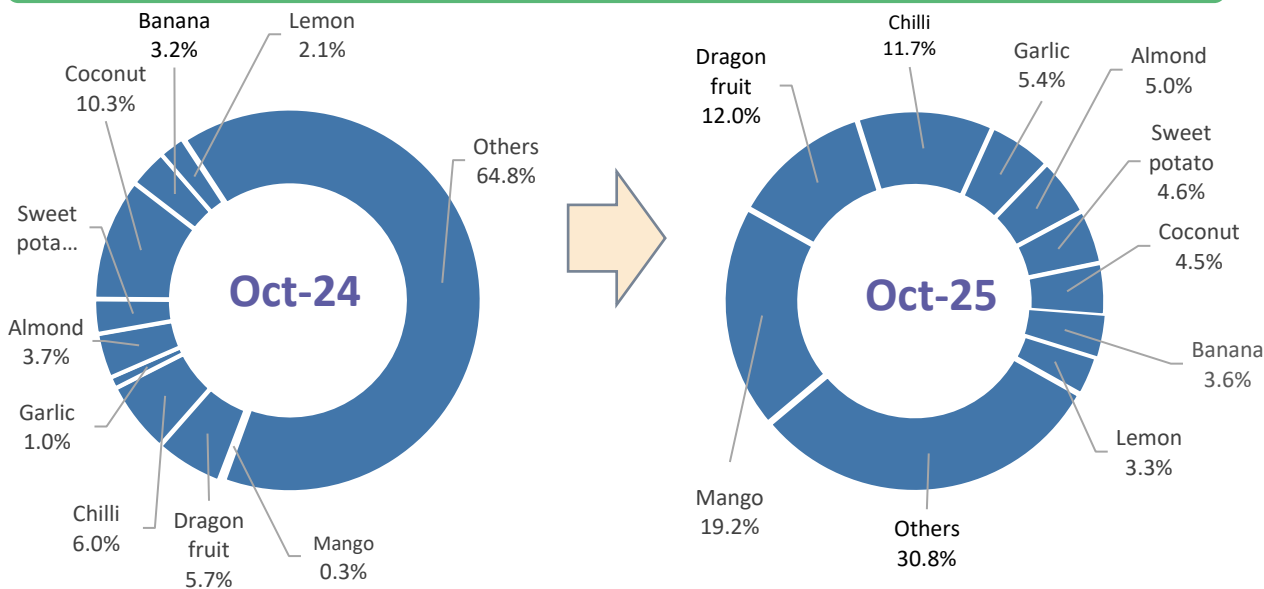


Nguồn: Tính toán từ số liệu của Cục Hải quan



FRUITS AND VEGETABLES (EXPORT)

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



Export results to the ASEAN, Oct-25



Mango

Value: **6.1** million USD

Increase **88.8%** compare to Sep 25

Increase **65.4%** compare to Oct 24



Dragon fruit

Value: **3.8** million USD

Increase **4.2%** compare to Sep 25

Increase **87.5%** compare to Oct 24



Chillis

Value: **3.7** million USD

Decrease **3.2%** compare to Sep 25

Increase **71.3%** compare to Oct 24



Garlic

Value: **1.7** million USD

Increase **22.8%** compare to Sep 25

Increase **398.7%** compare to Oct 24



Almond

Value: **1.6** million USD

Increase **12.2%** compare to Sep 25

Increase **17.1%** compare to Oct 24



Sweet potato

Value: **1.5** million USD

Increase **20.6%** compare to Sep 25

Increase **40.9%** compare to Oct 24



Coconuts

Value: **1.4** million USD

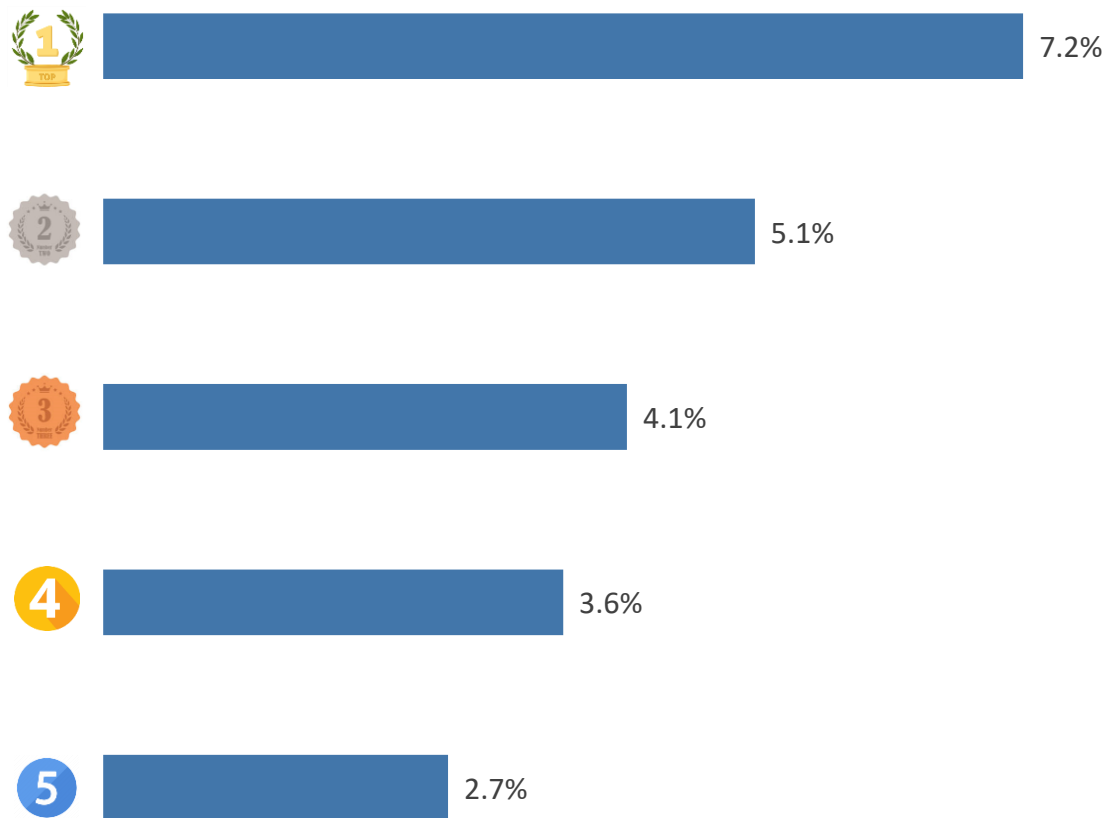
Decrease **58.8%** compare to Sep 25

Decrease **61.7%** compare to Oct 24

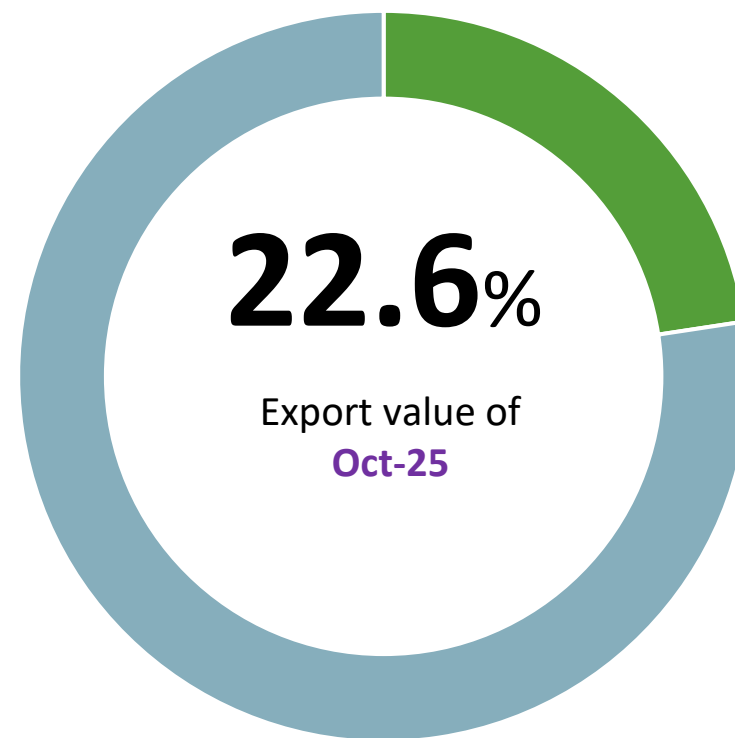


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Oct-25



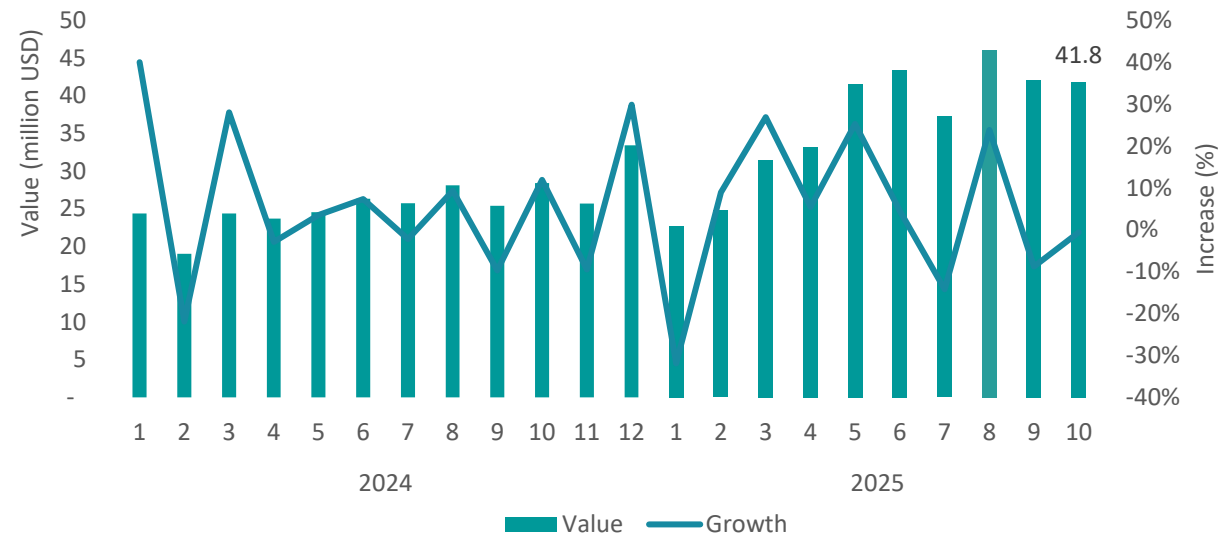
Value ratio of TOP 5 export enterprises to the ASEAN, Oct-25





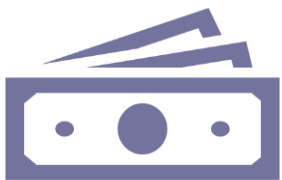
FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Oct-25



Import results to the ASEAN, Oct-25

VALUE



41.8

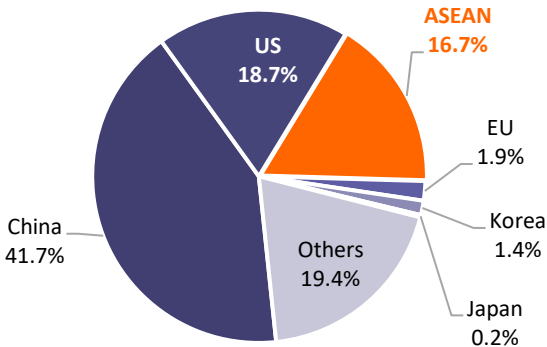
Mil. USD

Decrease **0.6%** compare to Sep-25

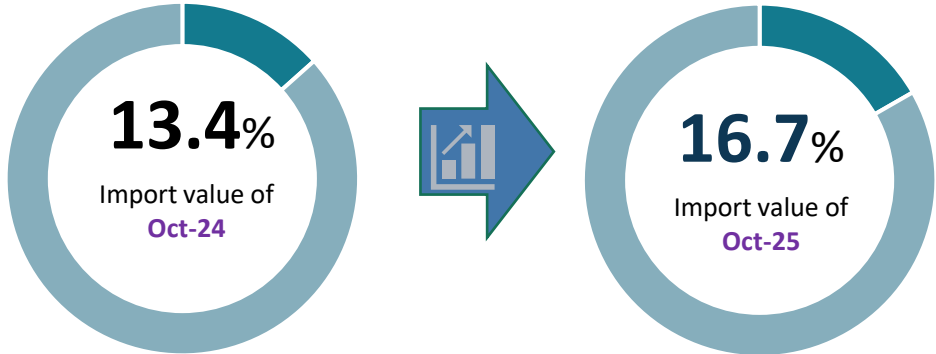
Increase **47.2%** compare to Oct-24
16.1 million USD more than the monthly average rate in 2024

Accumulated 10 months of 2025 reaches **364.4 million USD** and the rate is **117.8%** of the total in 2024.

Percentage of import value to the ASEAN, Oct-25



Changes in percentage of import value to the ASEAN, Oct-25

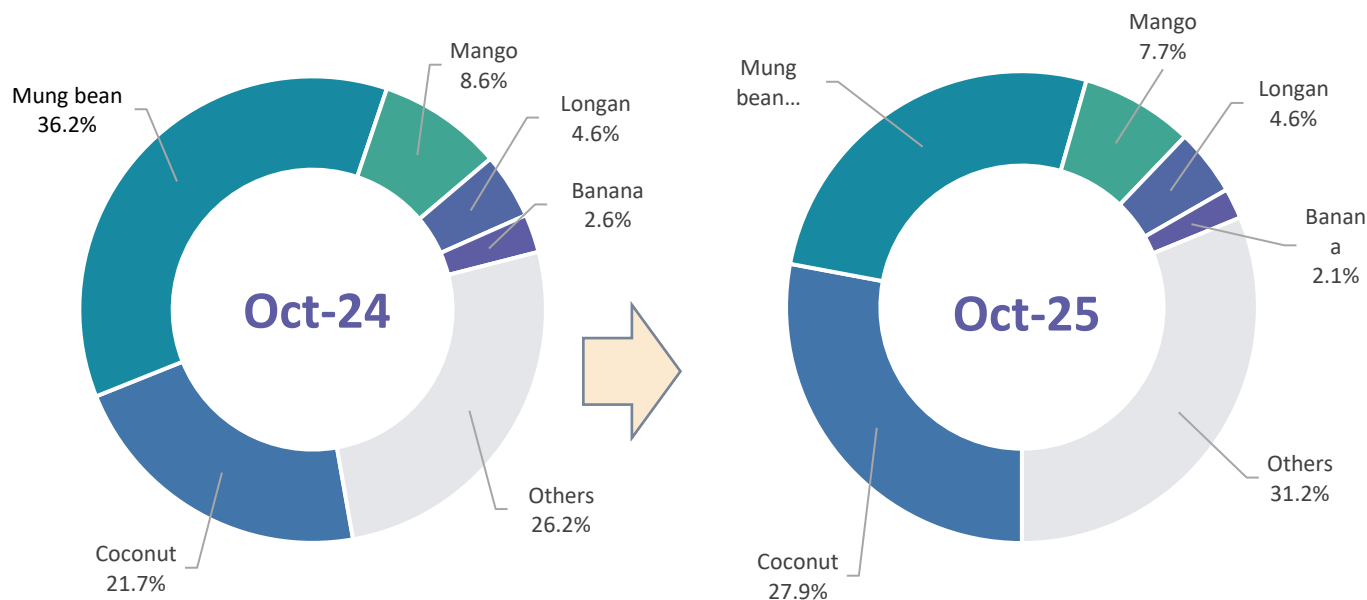


Nguồn: Tính toán từ số liệu của Cục Hải quan



FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Oct-25



Mango

Value: **3.2** million USD

Increase **145.6%** compare to Sep 25

Increase **31.5%** compare to Oct 24



Longan

Value: **1.9** million USD

Increase **84.8%** compare to Sep 25

Increase **47.5%** compare to Oct 24

Import results from the ASEAN, Oct-25



Coconuts

Value: **11.7** million USD

Decrease **15.7** compare to Sep 25

Increase **89.7%** compare to Oct 24



Mung bean

Value: **11.1** million USD

Increase **27.2%** compare to Sep 25

Increase **7.6%** compare to Oct 24



Banana

Value: **0.88** million USD

Increase **647.9%** compare to Sep 25

Increase **16.7%** compare to Oct 24



Thailand has proposed the expansion of four additional varieties of fresh fruit exports to China.

Thailand is actively seeking to broaden its fruit market in China following a meeting between Deputy Prime Minister and Agriculture Minister Thammanat Prompao and the General Administration of Customs of China (GACC) in Chongqing. In addition to durian, Thailand has proposed the inclusion of four additional fresh fruits: dates, salak, maprang, and mayong chid, with the aim of elevating its export value to China to over 160 billion baht (approximately 4.94 billion USD) annually. Since August 2025, GACC has been conducting inspections of the growing areas and packing facilities for dates and salak, and Thailand anticipates receiving approval early next year, while the other two fruits remain under review. If granted approval, initial exports are projected to reach 7,000 tonnes, valued at around 1.56 billion baht (approximately 48 million USD) per year. The two parties also collaborated to address the necessity of regulating sulfur dioxide residues in longan, consider prolonging the transition period under the 2004 protocol, and evaluate the new durian protocol to encompass the entire supply chain. Furthermore, Thailand and GACC reached an agreement to expedite the integration of the ePhyto system and traceability, with the objective of achieving complete connectivity by 2026. Minister Thammanat stated that enhancing SPS cooperation with China will assist Thailand in bolstering its competitiveness and broadening export opportunities for farmers.





Lao longan has been officially exported to China.

On November 13 in Chongqing, Laos and China convened the 9th ASEAN-China Ministerial SPS Cooperation Conference to enhance agricultural trade collaboration. During the event, Lao Deputy Minister of Agriculture and Environment Kikeo Singnavong and Chinese Deputy Minister of General Administration of Customs Zhao Zenglian formalized the new SPS Protocol. Under the new protocol, Laos is officially permitted to export longan to China, increasing the total number of Lao agricultural products authorized for this market to 40. The two parties also reached an agreement to open the Chinese market to durian, with plans to export approximately 400 tons of high-quality durian by 2026. China mandates that Lao enterprises adhere strictly to food quality and safety standards. Furthermore, the two nations deliberated on the expansion of agricultural trade, the simplification of market access procedures, and the enhancement of coordination in SPS management. To date, the two parties have executed 39 SPS protocols, enabling Laos to export 35 varieties of plant products and 4 types of animal products to China.





WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, Oct-25



Export results to ASEAN, Oct-25



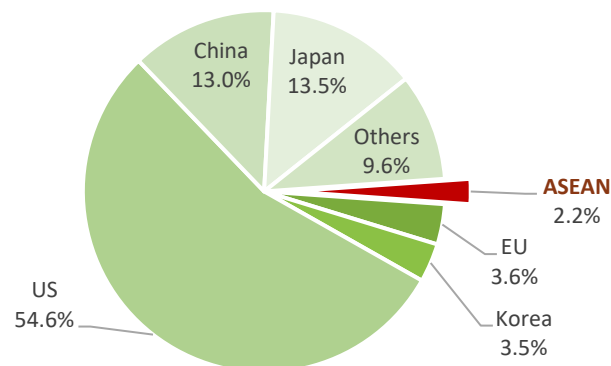
↗ Increase **27.8%** compare to Sep-25

↗ Increase **21.2%** compare to Oct-24

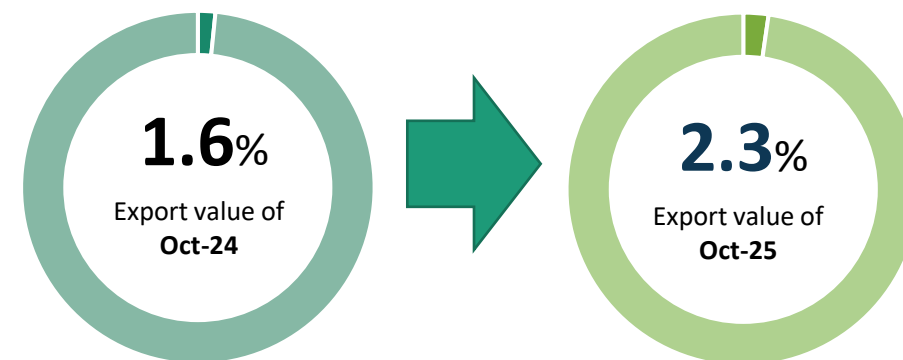
↑ **6.9 million USD** more than the monthly average rate in 2024

Accumulated 10 months of 2025 reaches **303.6** million USD, and the rate is **92.4%** of the total in 2024.

Percentage of export value to ASEAN, Oct-25



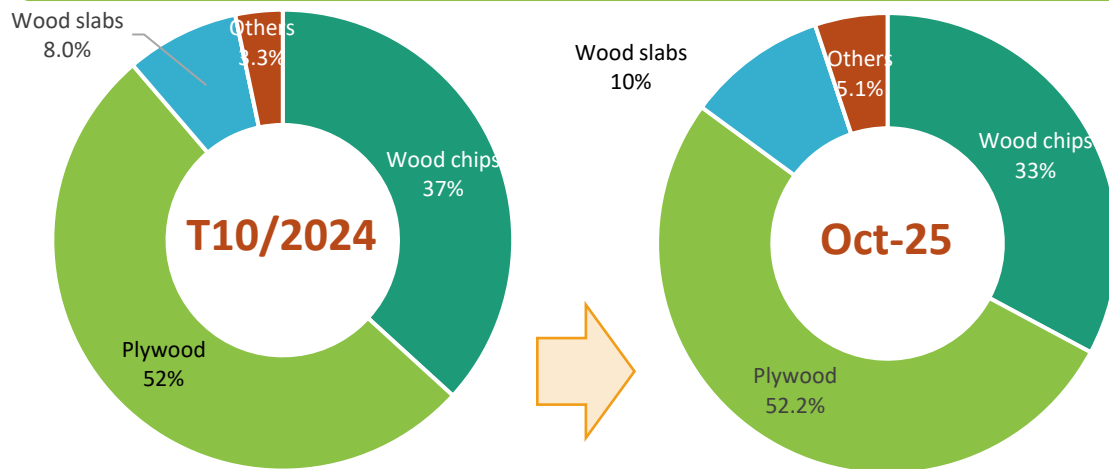
Changes in percentage of export value to ASEAN, Oct-25





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Oct-25



Export results to ASEAN, Oct-25



Plywood

Value: **24.6** million USD

Increase **9%** compare to Sep-25

Increase **9%** compare to Oct-24



Wood chips

Value: **15.5** million USD

Increase **350%** compare to Sep-25

Decrease **3%** compare to Oct-24



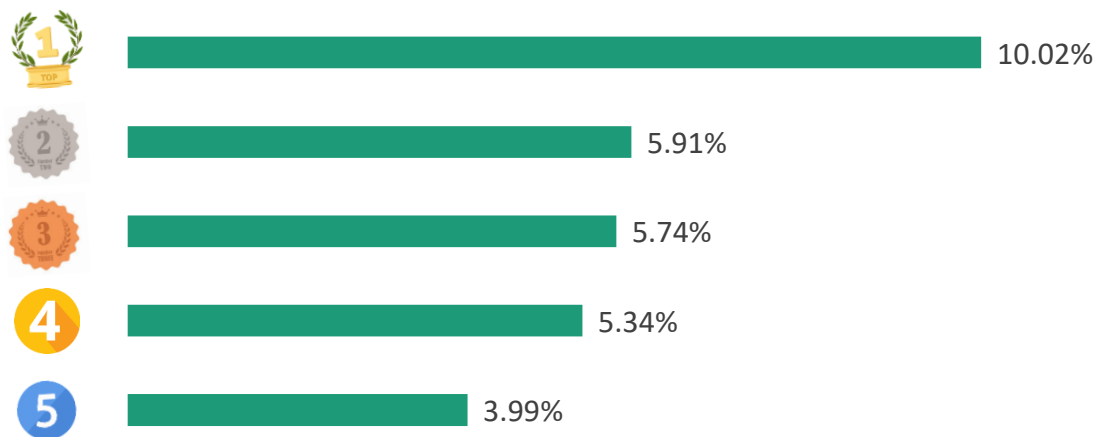
Wood slabs

Value: **4.6** million USD

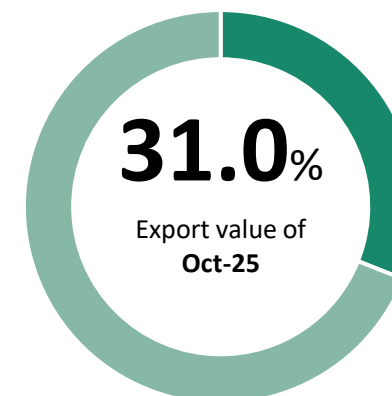
Increase **6%** compare to Sep-25

Increase **34%** compare to Oct-24

TOP 5 export enterprises by value to ASEAN, Oct-25



Value ratio of TOP 5 export enterprises to ASEAN, Oct-25





A notable advancement in trade is the establishment of a “Reciprocal Trade Agreement” between Malaysia and the United States. Under this agreement, Malaysia has pledged to offer substantial market access incentives for US goods, while the US will uphold a 19% reciprocal tariff on imports from Malaysia, with certain exceptions allowing for full duty exemption. This agreement is anticipated to further enhance bilateral trade, which has already experienced a 15.4% increase in the first nine months of the year. Furthermore, the Malaysian government is actively pursuing green finance initiatives and striving for recognition as a “low-risk” country under the EUDR Regulation.



The Indonesian government has taken significant steps to enhance the credibility of the Timber Legality and Sustainability Verification System (SVLK), while clarifying that not all deforestation is deemed illegal under the nation's laws. Economically, the furniture industry is exhibiting signs of recovery with orders from Japan and the EU, yet it continues to confront uncertainties stemming from US tariffs and forthcoming EUDR requirements. On the international stage, Indonesia has committed to investing \$1 billion in the Brazil-initiated Tropical Forest Forever Fund (TFFF).

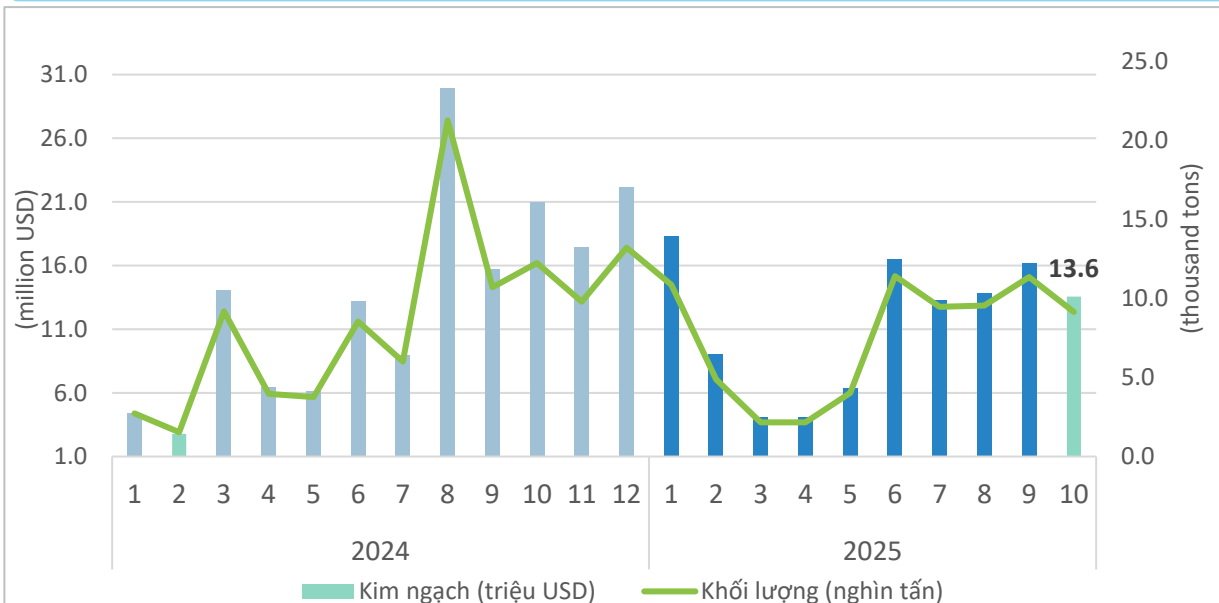


Myanmar's timber industry is presently experiencing a recession. The Myanmar Timber Enterprise (MTE) is facing challenges in marketing logs and sawn timber on the international stage and is increasingly focusing on domestic sales in MMK. Exports have significantly decreased, leading some sawmills to halt production aimed at export markets. This downturn occurs amid increasingly intricate economic conditions, characterized by escalating conflict and heightened economic sanctions in anticipation of the general elections scheduled for December 2025.

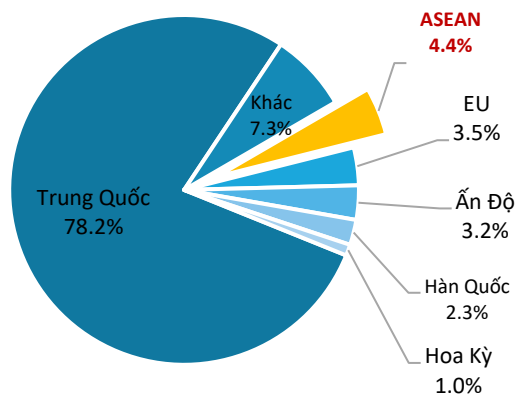


RUBBER

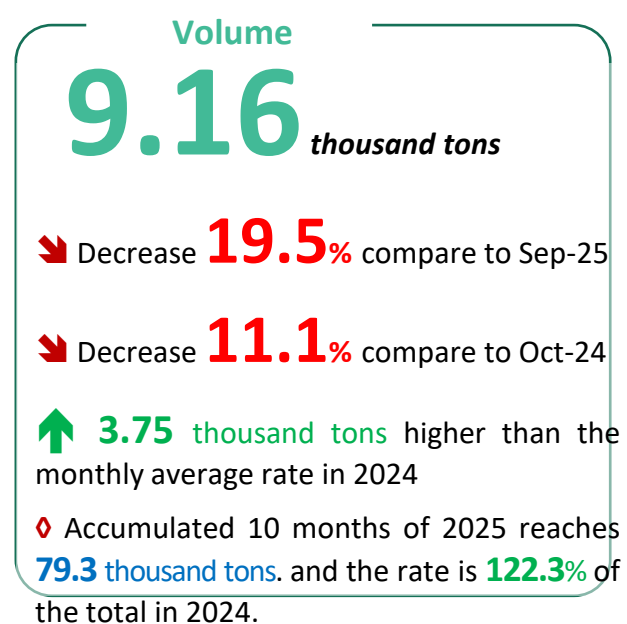
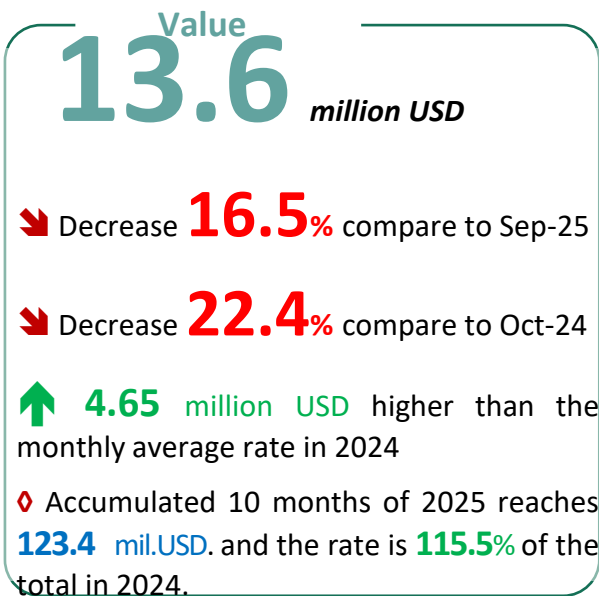
Import value to the ASEAN, Oct-25



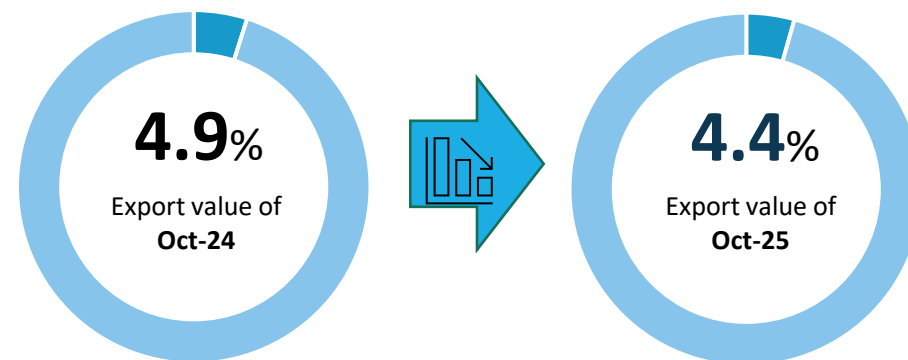
Percentage of import value to the ASEAN, Oct-25



Import results to the ASEAN, Oct-25



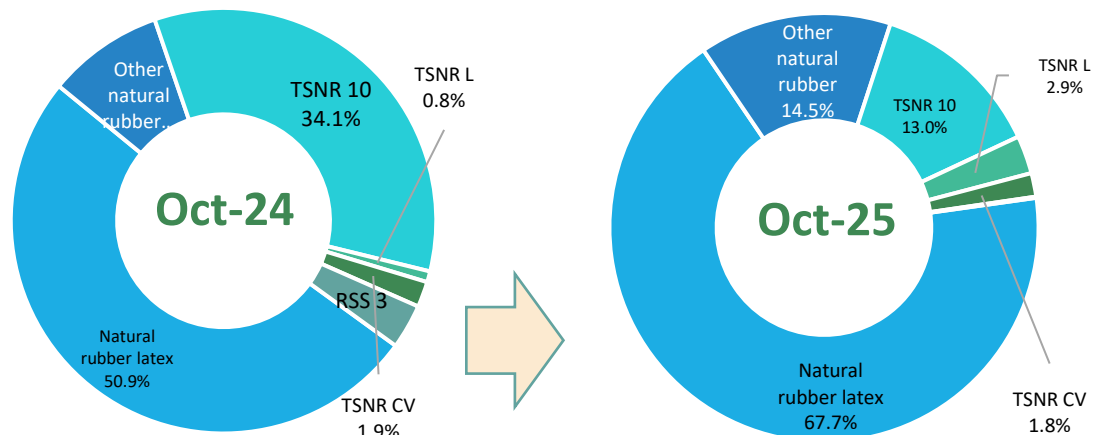
Changes in the percentage of export Value to ASEAN, Oct-25





RUBBER

Structure of exports by products to ASEAN, Oct-25



Export results to ASEAN, Oct-25



Other natural rubber

Value: **1.95** million USD

Decrease **0.9%** compare to Sep-25

Increase **5.7%** compare to Oct-24



TSNR 10

Value: **2.1** million USD

Increase **19.7%** compare to Sep-25

Decrease **64%** compare to Oct-24



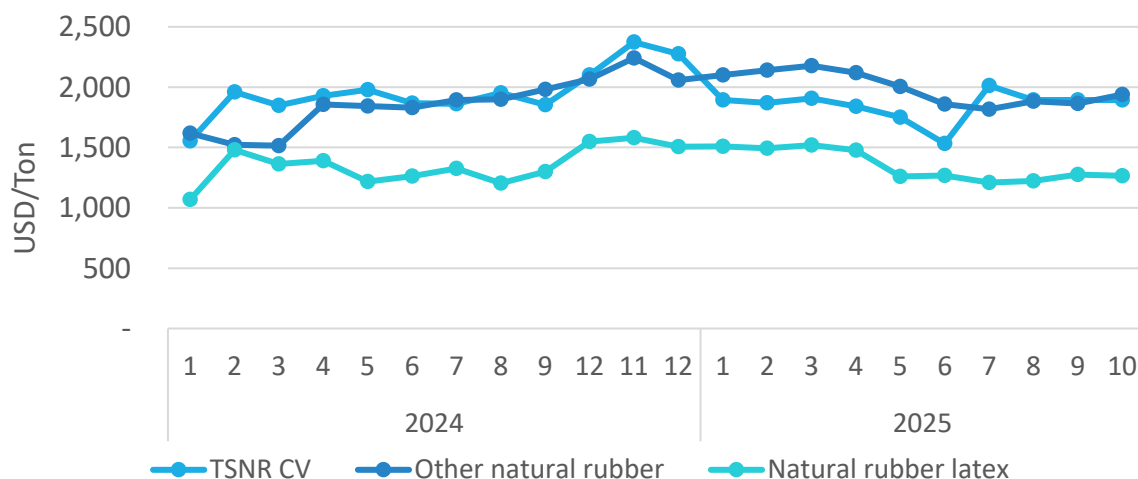
Natural rubber latex

Value: **7.2** million USD

Decrease **22%** compare to Sep-25

Decrease **14%** compare to Oct-24

Average export price to ASEAN, Oct-25



Other natural rubber

The average export price in Oct-25 is **1.940** USD/tấn; Increase **4.0%** compare to the previous month; and Decrease **6.1%** compare to the same month in 2024.

TSNR CV

The average export price in Oct-25 is **1.895** USD/tấn; Increase **0.1%** compare to the previous month; and Decrease **9.8%** compare to the same month in 2024.

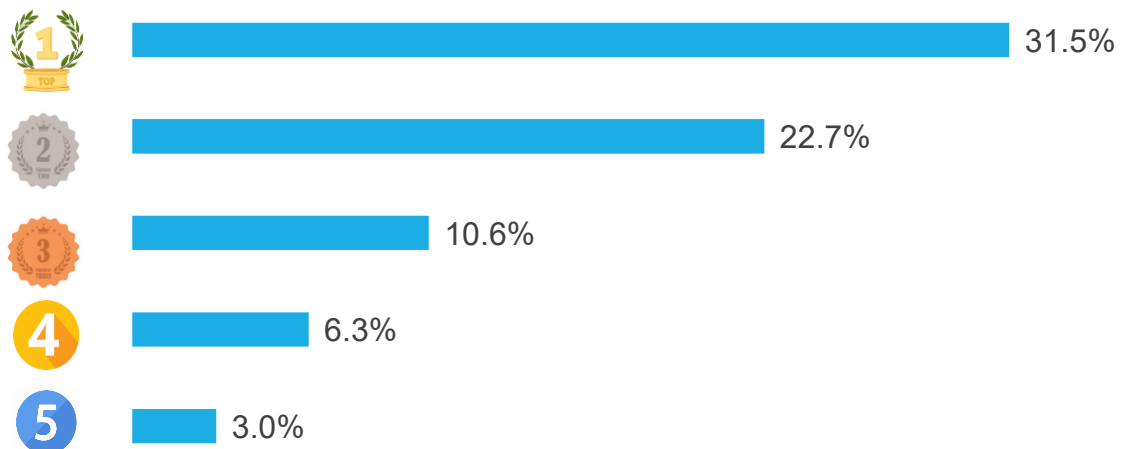
Natural rubber latex

The average export price in Oct-25 is **1.265** USD/tấn; Decrease **0.9** compare to the previous month; and decrease **18.4%** compare to the same month in 2024.

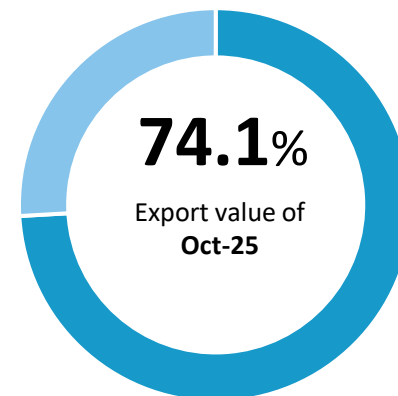


RUBBER

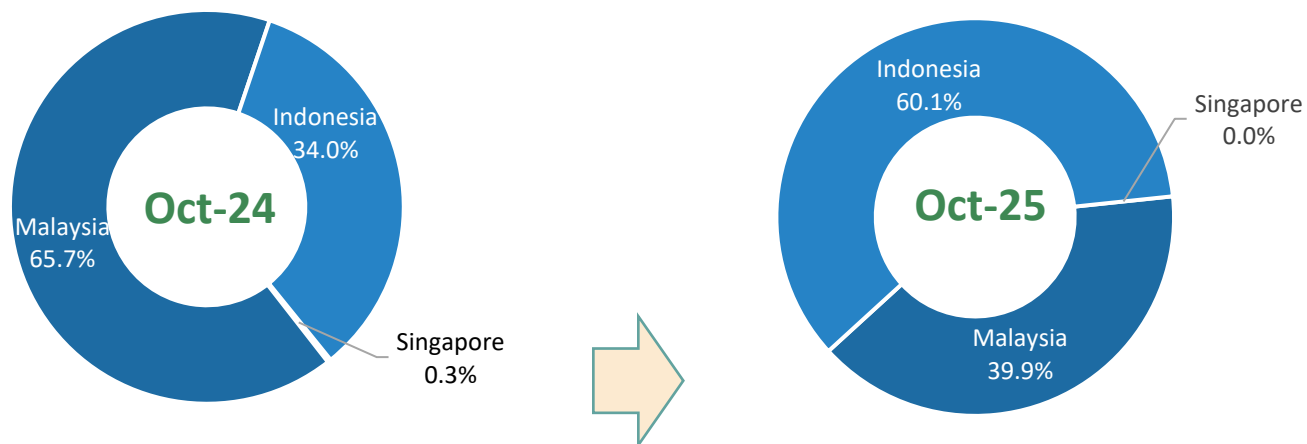
Top 5 export enterprises by Value to ASEAN, Oct-25



Value ratio of Top 5 export enterprise to ASEAN. Oct-25



Change in percentage of export to ASEAN, Oct-25



Vietnamese rubber 'swims against the current' in Southeast Asia as traditional markets decline.

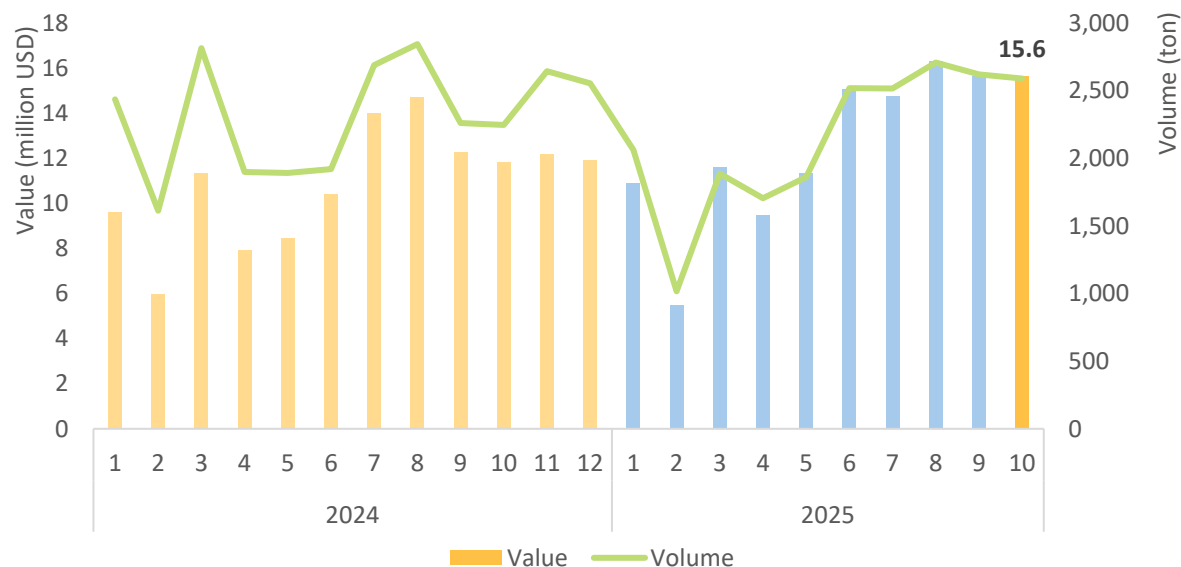
The significant decrease in demand from key partners, including India and the United States, along with indications of a slowdown in China, is being counterbalanced by a robust surge in purchases from Southeast Asia, where Vietnamese rubber has secured a new pricing benchmark. Malaysia and Indonesia are emerging as pivotal players in Vietnam's rubber industry. Over the past ten months, Malaysia has augmented its rubber imports from Vietnam by 63.7%, while Indonesia has experienced an even more substantial increase of 106%. This development enables the Southeast Asian region to gradually supplant the diminishing role of traditional markets. In addition to the rise in volume, Vietnamese rubber is also establishing a strong price position in the Malaysian market, with the average export price reaching 1,943 USD per ton, significantly surpassing that of Thailand and the Ivory Coast. This trend indicates that Vietnam is transitioning from a focus on low pricing to an emphasis on quality, supply capacity, and consistent standards. The remarkable growth in Malaysia and Indonesia is creating a strategic pathway, enabling the Vietnamese rubber industry to diminish its reliance on a singular market and enhance its resilience to global fluctuations.



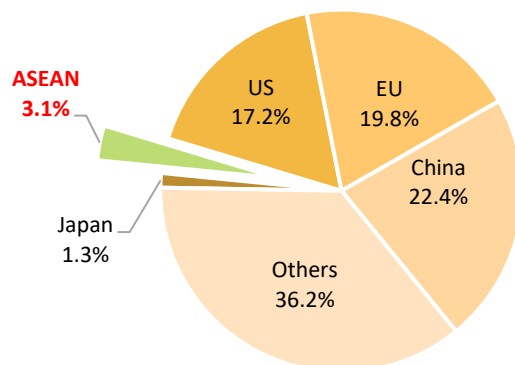


CASHEW

Export volume and value to ASEAN, Oct-2025



Percentage of export value to ASEAN Oct-25



Export results to ASEAN Oct-25

Value
15.65 Mil. USD

↘ Decrease **0.04%** compare to Sep-25

↗ Increase **32.2%** compare to Oct-24

↑ **4.8 million USD** more than the monthly average rate in 2024.

❖ Accumulated 10 months of 2025 reaches **126 Mil.USD**, and the rate is **97%** of the total in 2024.

Volume
2.6 thousand tons

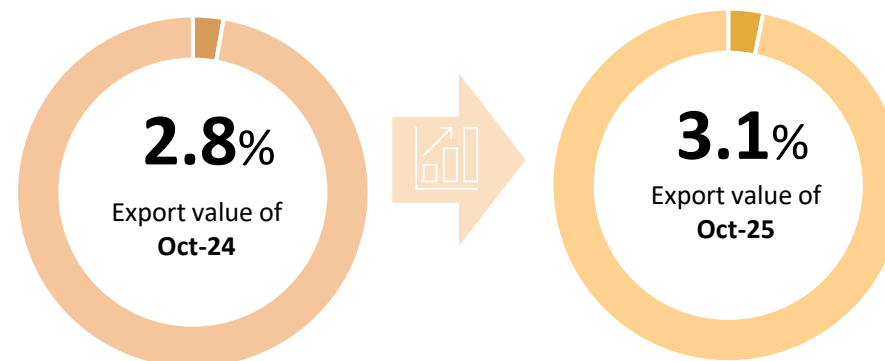
↘ Decrease **1.2%** compare to Sep-25

↗ Increase **13.6%** compare to Oct-24

↑ **260 tons** more than the monthly average rate in 2024.

❖ Accumulated 10 months of 2025 reaches **21.5 thousand tons**, and the rate is **77%** of the total in 2024.

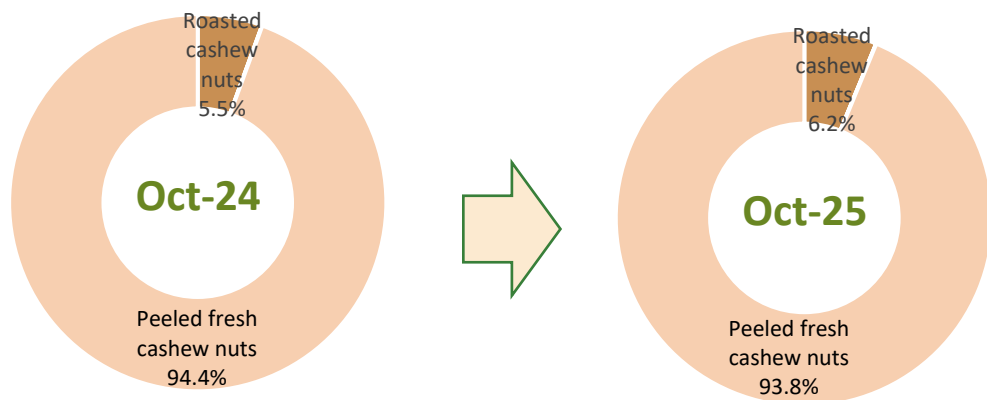
Changes in percentage of export value to ASEAN Oct-25





CASHEW

Structure of exports by products to ASEAN, Oct-25



Export results to ASEAN, Oct-25



Peeled fresh cashew nuts

Value: **14.67** million USD

Increase **0.7%** compare to Sep-25

Increase **31.3%** compare to Oct-24



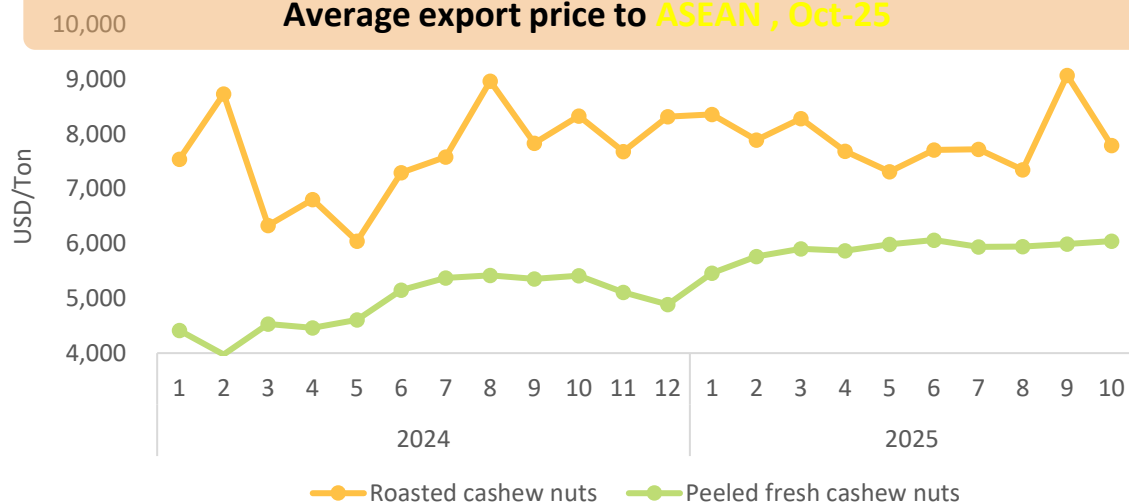
Roasted cashew nuts

Value: **0.97** million USD

Decrease **8.5%** compare to Sep-25

Increase **48%** compare to Oct-24

Average export price to ASEAN, Oct-25



Peeled fresh cashew nuts

The average export price in Oct-25 is **6.045** USD/ton; Increase **0.9%** compare to the previous month; and Increase **11.7%** compare to the same month in 2024.

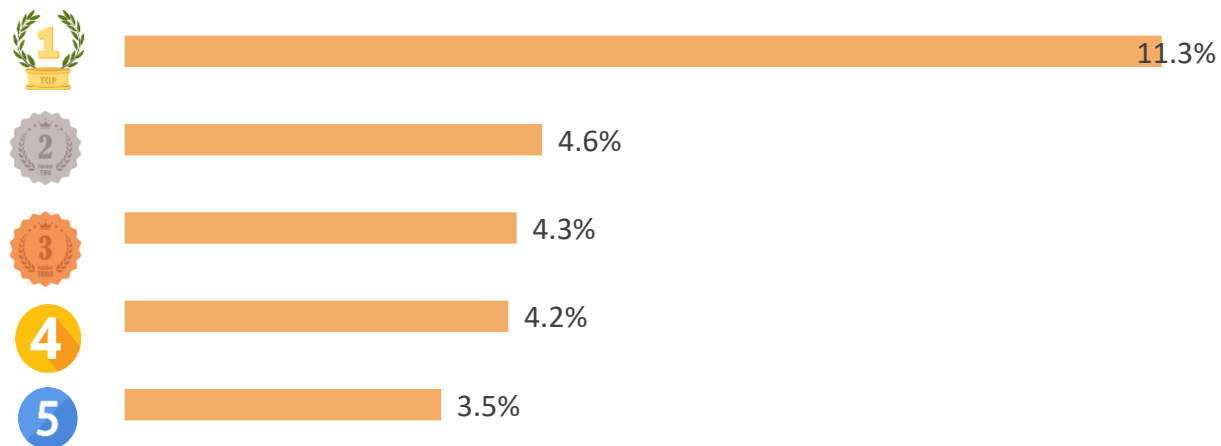
Roasted cashew nuts

The average export price in Oct-25 is **7.788** USD/ton; Decrease **14.1%** compare to the previous month; and Decrease **6.5%** compare to the same month in 2024.

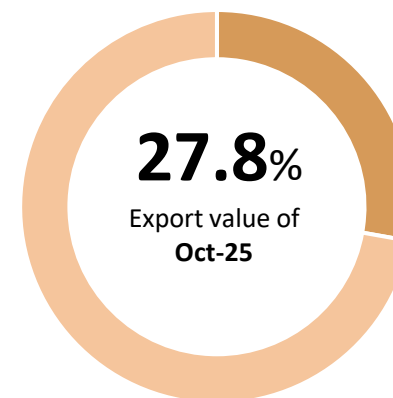


CASHEW

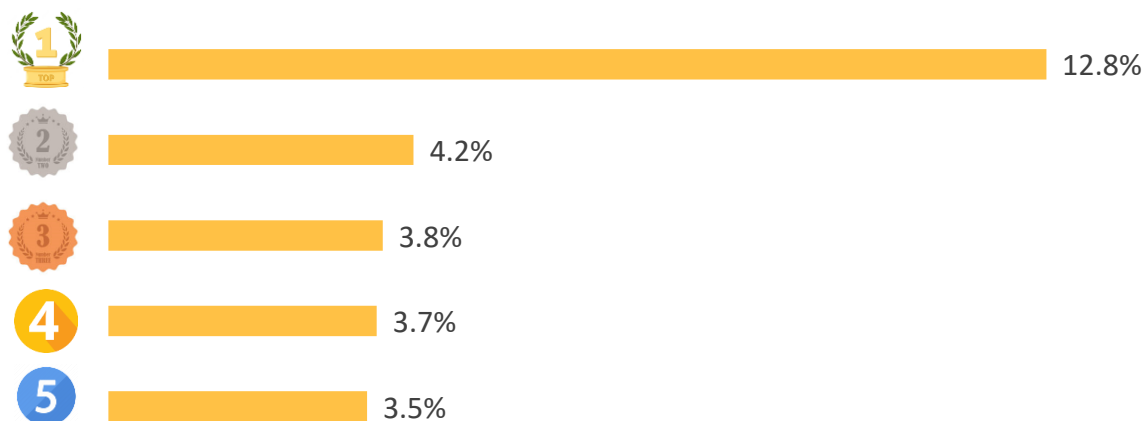
Top 5 export enterprises by Value to ASEAN, Oct-25



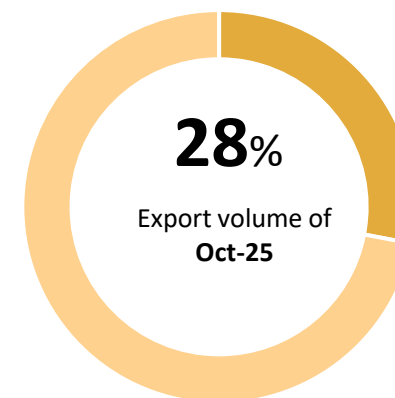
Value ratio of Top 5 export enterprise to ASEAN, Oct-25



Top 5 export enterprises by volume to ASEAN, Oct-25



Volume ratio of Top 5 export enterprise to ASEAN, Oct-25



Cambodia has emerged as a pivotal source of cashews amid global turmoil.



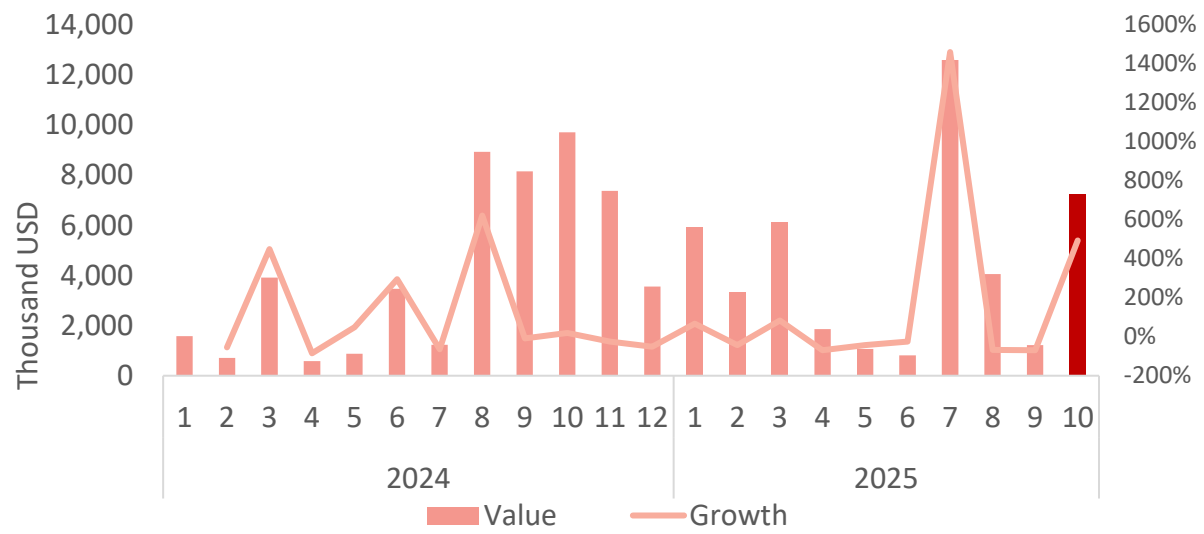
Cambodia is experiencing direct repercussions from the political unrest in Tanzania, as the East African nation's cashew harvest has been interrupted, resulting in a global supply shortage. Consequently, raw cashew prices in Cambodia have surged, reaching \$2,050 per ton in October 2025, a significant rise that starkly contrasts with the typical seasonal decline observed from September to January. In the domestic market, competition for raw materials has intensified between Vietnamese and Indian traders. Vietnam is willing to pay higher prices due to its proximity to transportation, while India retains an advantage through its longstanding relationships and consistent import activities. In this volatile context, Cambodia is emerging as a significant source of cashew nuts in the region, with 941,000 tonnes exported in the first eight months of 2025, generating US\$1.4 billion. However, the majority of production is still exported to China through third countries, which limits value addition. In the long term, the outlook for the Cambodian cashew industry is assessed positively, with the cashew cultivation area expected to reach 600,000 hectares by the end of 2025 and production likely to exceed 1 million tonnes per year, underscoring Cambodia's increasingly vital role in the global cashew supply chain.






MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Oct-25



Export results to ASEAN, Oct-25



Value

7.25
Triệu USD

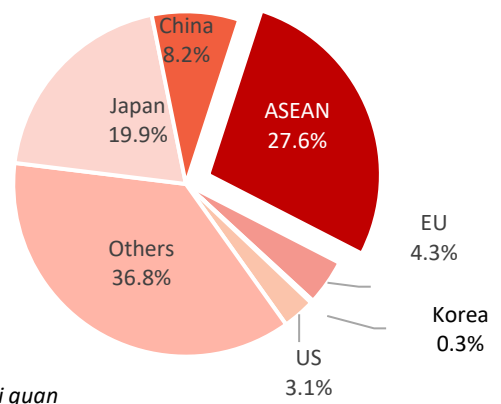
↗ Increase **493%** compare to Sep-25

↘ Decrease **25%** compare to Oct-24

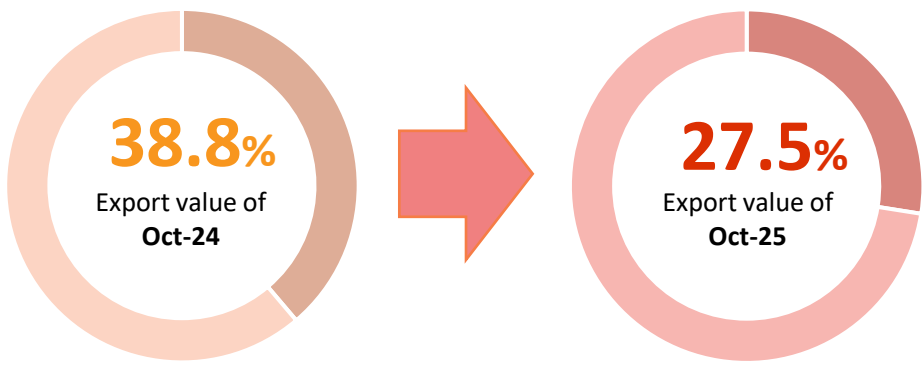
↘ **3.1 million USD** less than the monthly average rate in 2024

◇ Accumulated 10 months of 2025 reaches **44.3 million USD**, and the rate is **88.3%** of the total in 2024.

Percentage of export value to ASEAN, Oct-25



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

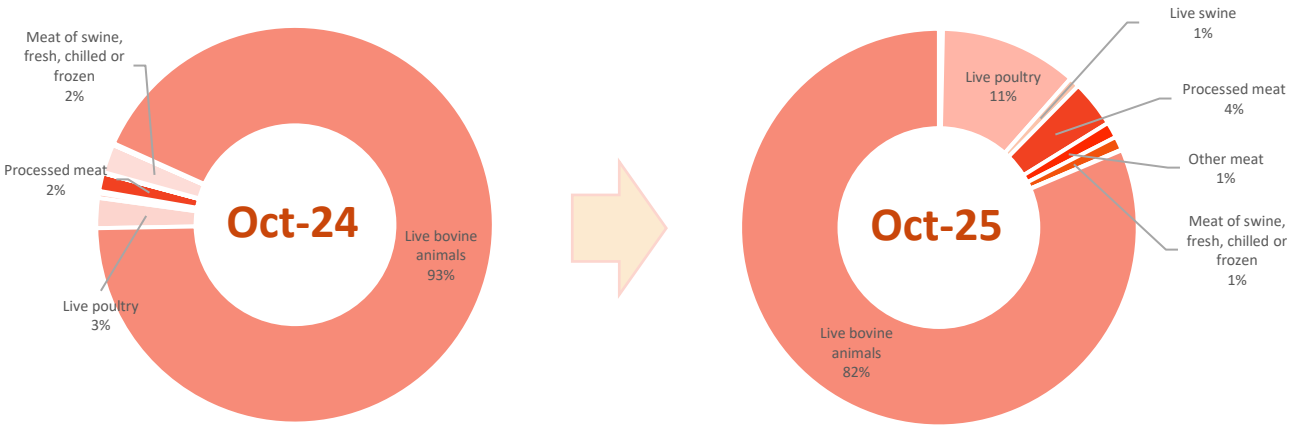


Nguồn: Tổng hợp từ số liệu của Cục Hải quan



MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Oct-25



Export results to ASEAN, Oct-25



Live bovine animals

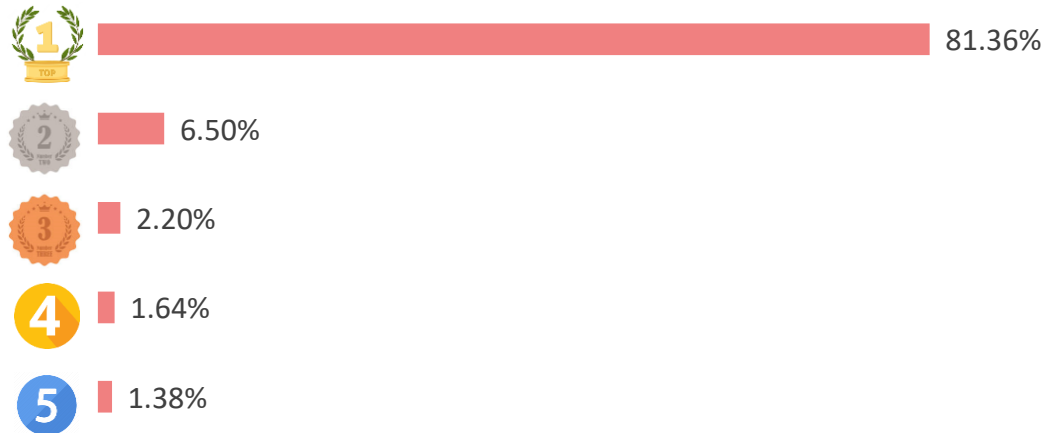
Value: **5.9** million USD
Decrease **34.7%** compare to Oct 24



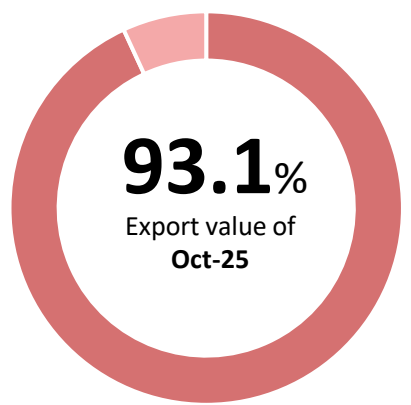
Live poultry

Value: **811** nghìn USD
Increase **8.5%** compare to Sep-25
Increase **241.7%** compare to Oct-24

Percentage of export value to ASEAN, Oct-25



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

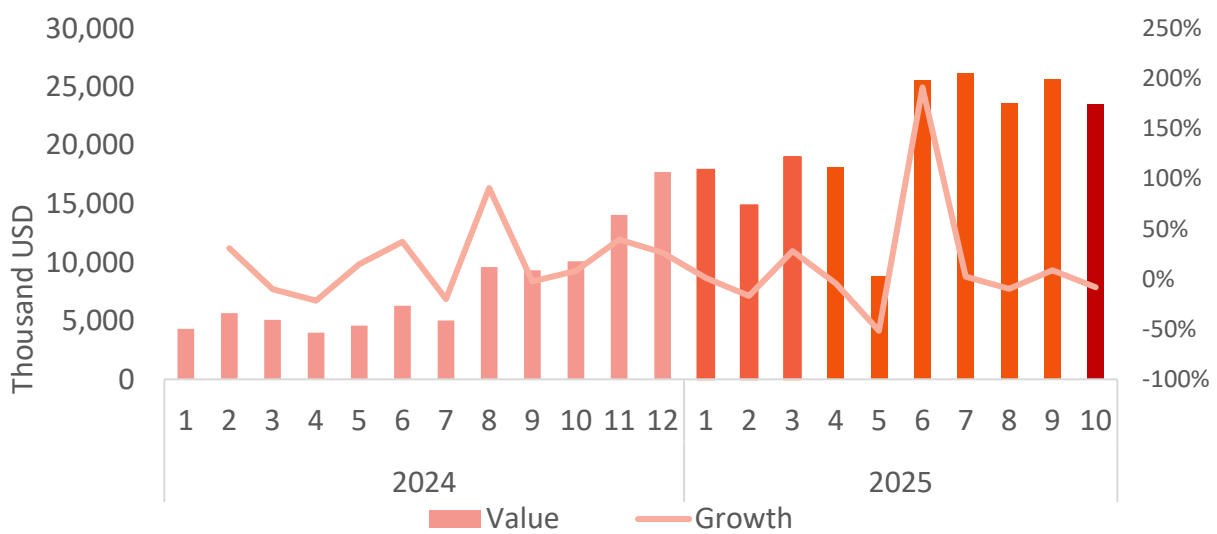


Nguồn: Tổng hợp từ số liệu của Cục Hải quan




MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Oct-25



Import results to ASEAN, Oct-25

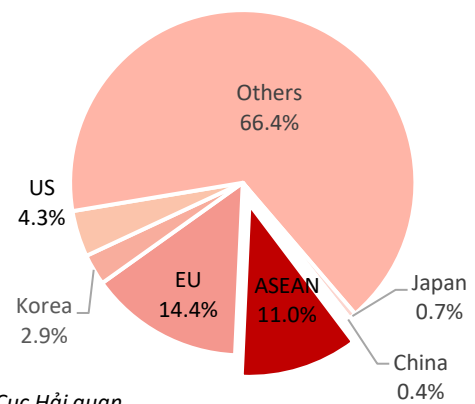


23.5
MillionUSD

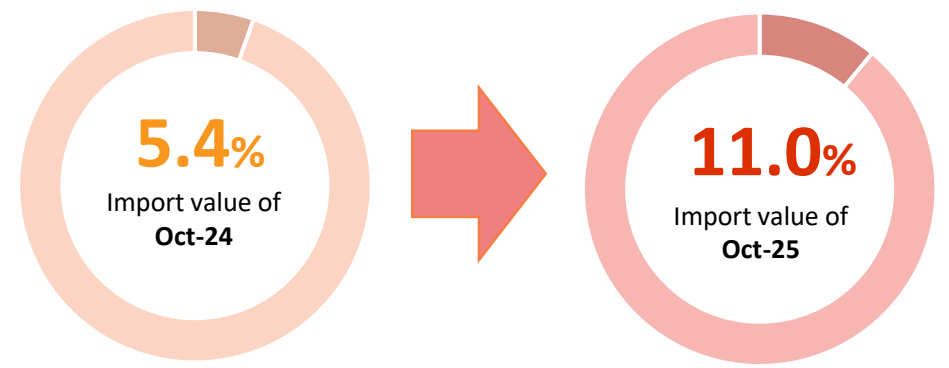
Value

- Decrease **8.3%** compare to Sep-25
- Increase **132.9%** compare to Oct-24
- 15.5 triệu USD more than the monthly average rate in 2024
- Accumulated 10 months of 2025 reaches **203.03 million USD**, and the rate is **212%** of the total in 2024

Percentage of import value to ASEAN, Oct-25



Changes in percentage of import value to ASEAN, Oct-25

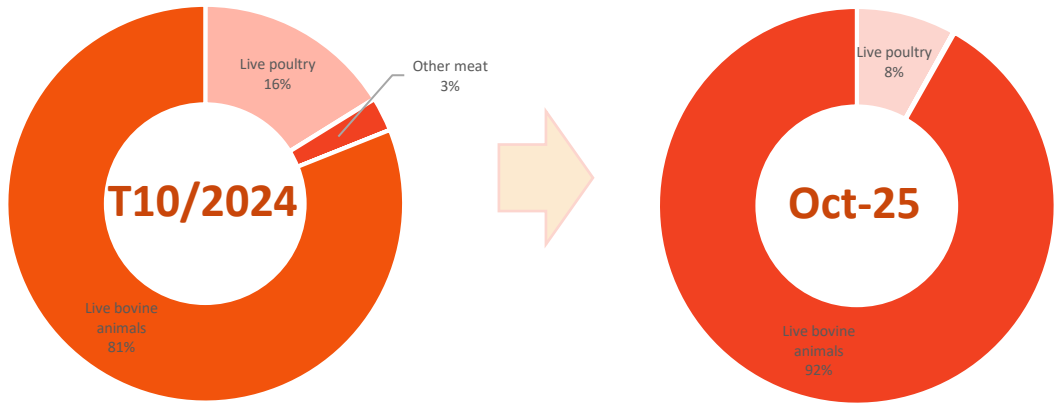


Nguồn: Tổng hợp từ số liệu của Cục Hải quan



MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Oct-25



Import results to ASEAN, Oct-25



Live bovine animals

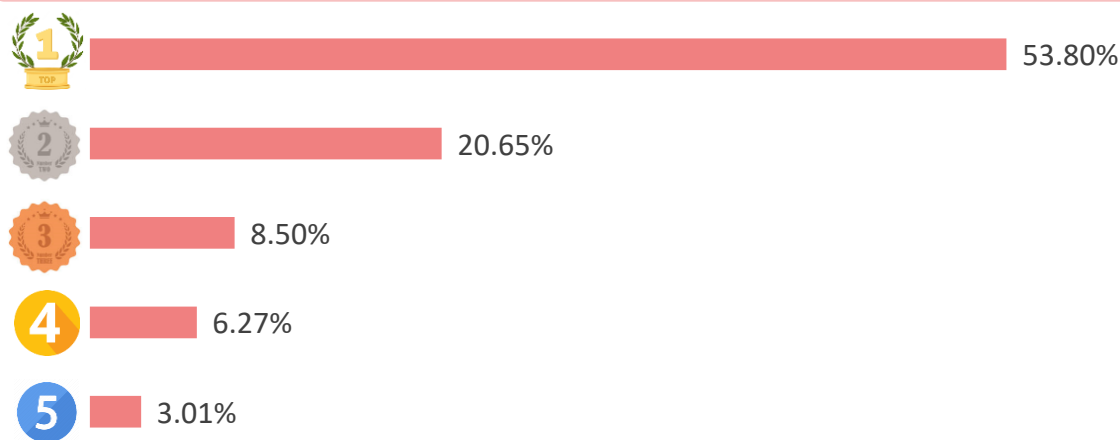
Value: **21.5** million USD
Decrease **8.7%** compare to Sep-25
Increase **163.8%** compare to Oct-24



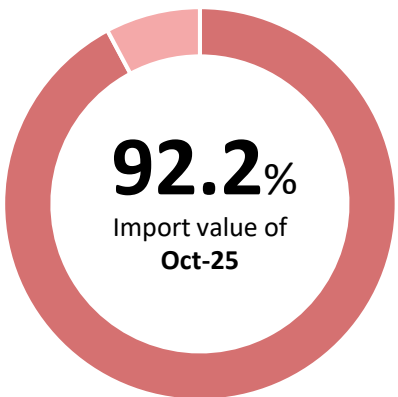
Live poultry

Value: **1.89** million USD
Decrease **1.96%** compare to Sep-25
Increase **16.4%** compare to Oct-24

Percentage of import value to ASEAN, Oct-25



Changes in percentage of import value to ASEAN, Oct-25





MEAT & MEAT PRODUCTS

SPOTLIGHT



At the APEC 2025 Summit in Gyeongju, South Korea, Singapore finalized quarantine negotiations, thereby officially permitting the importation of Jeju Hanwoo beef and pork. This decision took effect immediately following the summit on November 2. Slaughterhouses and processing facilities in Jeju—including the Jeju Livestock Auction Market, Jeju Pork Producers Association, Daehan F&B, and Seogwipo Livestock Export Cooperative—were inspected and authorized by Singaporean authorities during an inspection visit in August, facilitating the pathway for official exports.

Source: baomoi.com





Ý kiến góp ý. xin vui lòng gửi đến:

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VIỆN CHIẾN LƯỢC. CHÍNH SÁCH NÔNG NGHIỆP VÀ MÔI TRƯỜNG

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Website: <http://agro.gov.vn/>



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