



ISPAE

Volume: 11/2025

MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

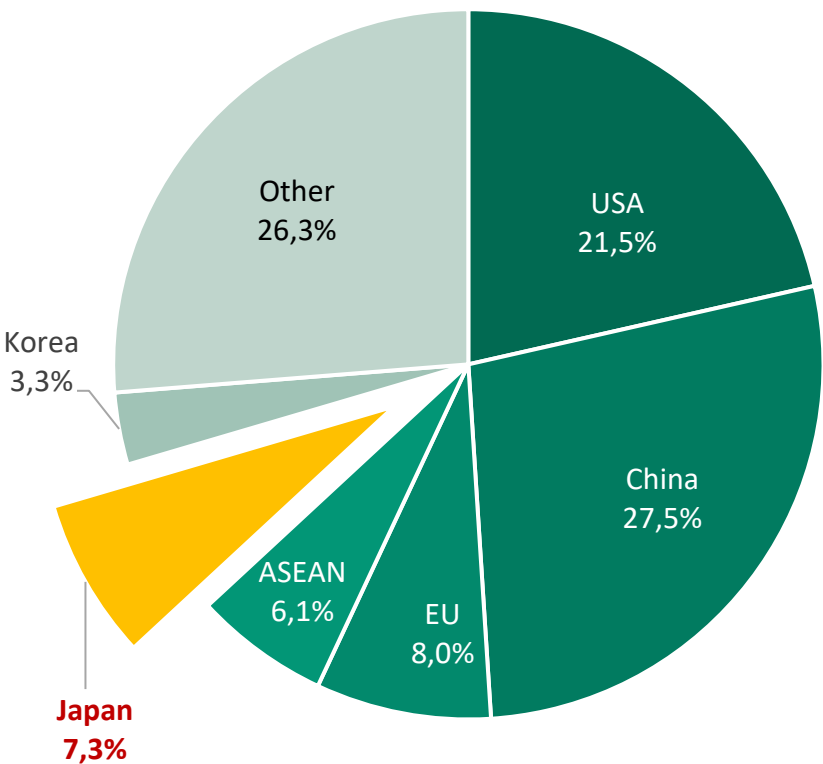
FROM VIETNAM TO JAPAN MARKET

Prepared by: **AGREINFOS**



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

Share of AFF product export to Japan in Oct-2025



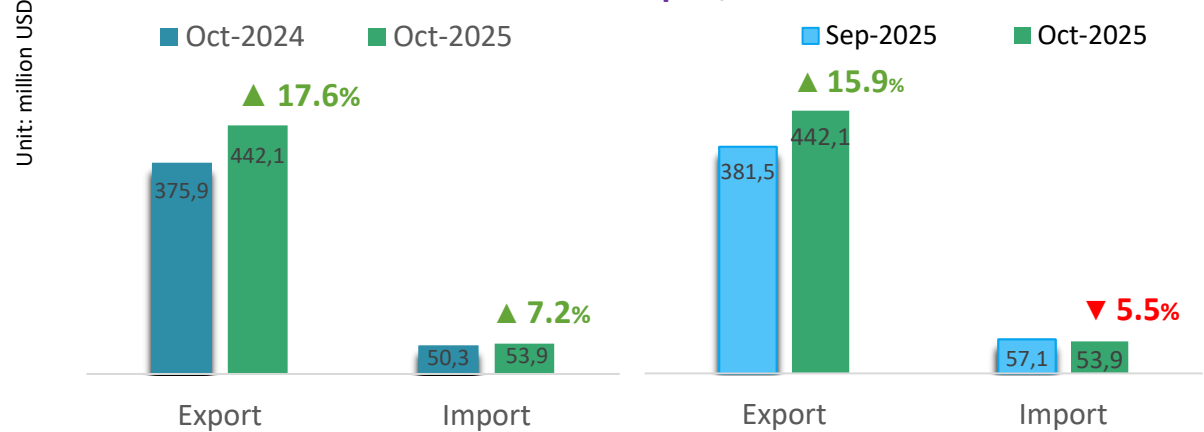
Changes in the share of AFF product export to Japan in Oct-2025 compared to Sep-2025 and Oct-2024

Market	Export value (million 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%
Korea	198	▲ 1,9%	▲ 1,5%
Total export	6.023		

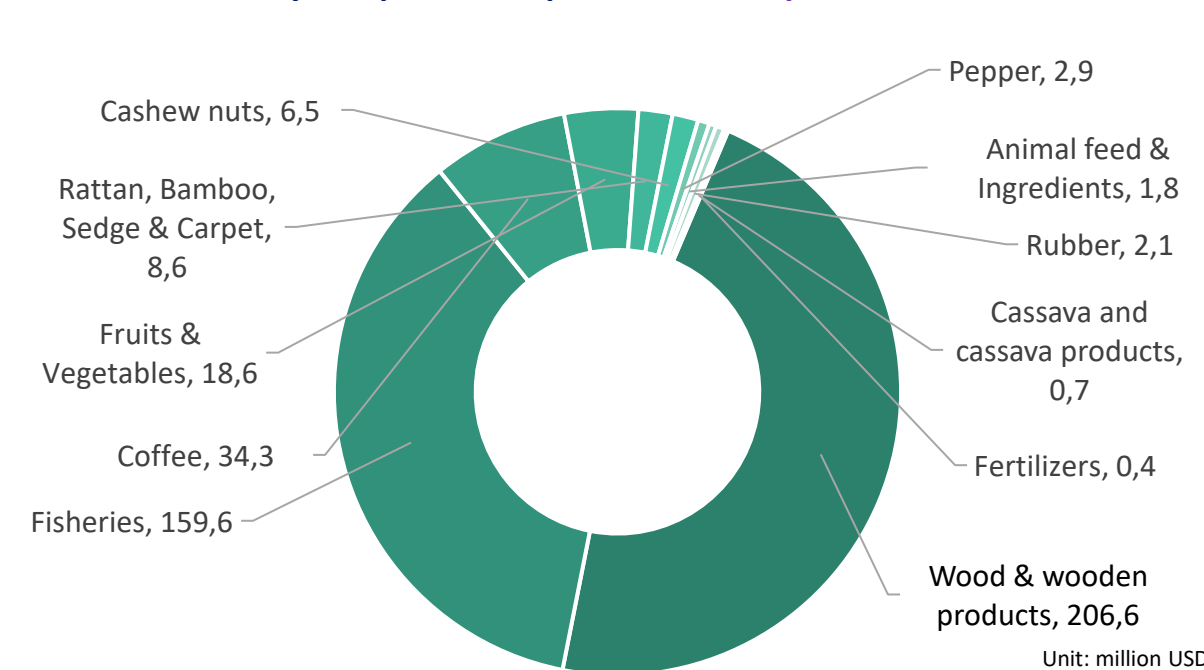
Source: Calculated from data of the Department of Customs

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

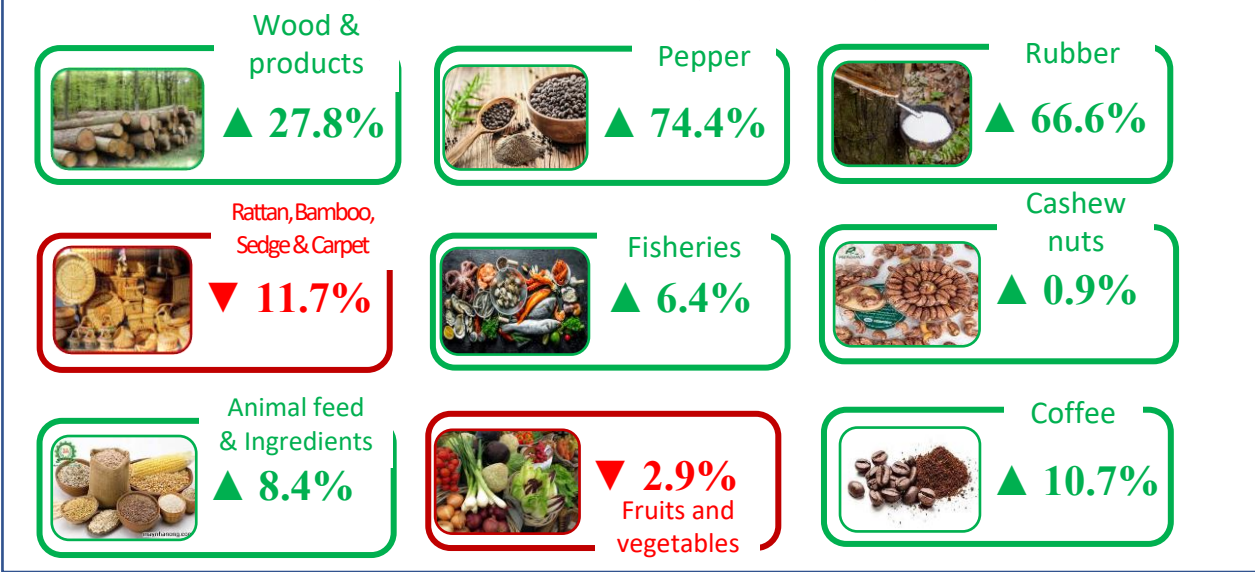
AFF product import-export value between Viet Nam and Japan, Oct-2025



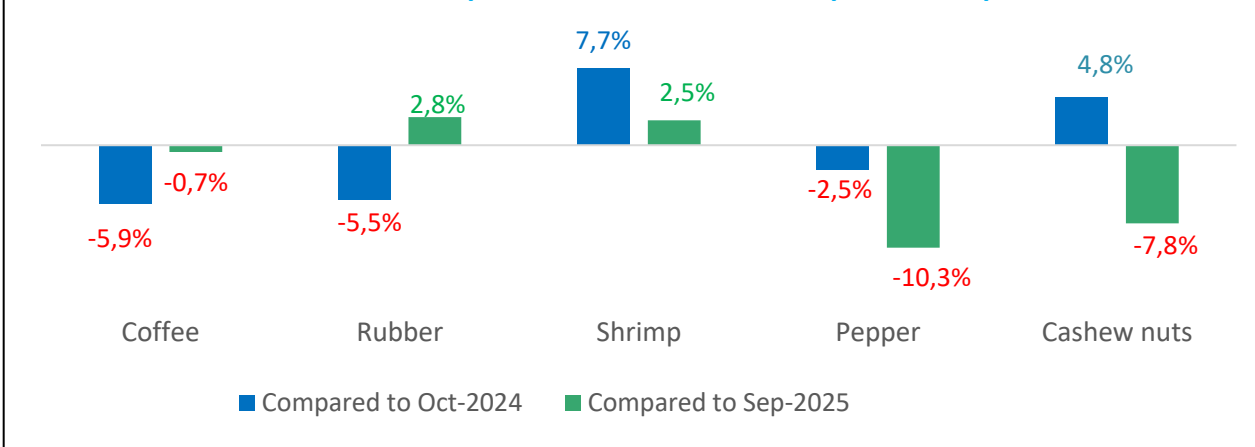
Key AFF product export value to Japan, Oct-2025



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



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



Source: Calculated from data of the General Department of Customs

Japan's economy is recovering at a moderate pace

On November 26, the Japanese government maintained its assessment that the domestic economy is recovering at a moderate pace, but it also warned that higher tariffs imposed by the United States continue to put pressure on the automobile industry.

Prime Minister Sanae Takaichi's Cabinet has approved the largest supplementary

spending package since the COVID-19 pandemic, worth 21.3 trillion yen (approximately USD 135.5 billion), which includes a wide range of measures from price support to promoting investment in priority sectors.

Experts note that the impact of the U.S. tariff reductions on automobiles became more visible in October 2025 and is likely to improve further in the coming period. However, expectations for a strong export recovery remain limited due to China's

weak economic performance.



Source: vietnamplus.vn

Japan's exports grow beyond expectations thanks to a weaker yen

On November 21, the Japanese government announced that the country's exports in October rose 3.6%, marking the second consecutive monthly increase and significantly surpassing forecasts, supported by stable demand from the United States, Asia, and the EU, as well as a weaker yen. Core CPI rose 3%, continuing to exceed the 2% target and increasing the likelihood that the Bank of Japan

may soon raise interest rates. GDP in the third quarter posted its first decline in six quarters due to the impact of U.S. tariffs, although domestic demand remained relatively resilient.

The U.S. reduction of automobile tariffs to 15% from September helped ease pressure on Japanese manufacturers. In October, imports edged up 0.7%, and Japan recorded a trade deficit of 231.8 billion yen, smaller than expected.

According to experts, Japan's economy is showing signs of recovery but still faces risks from

trade policy and inflation in the coming months.



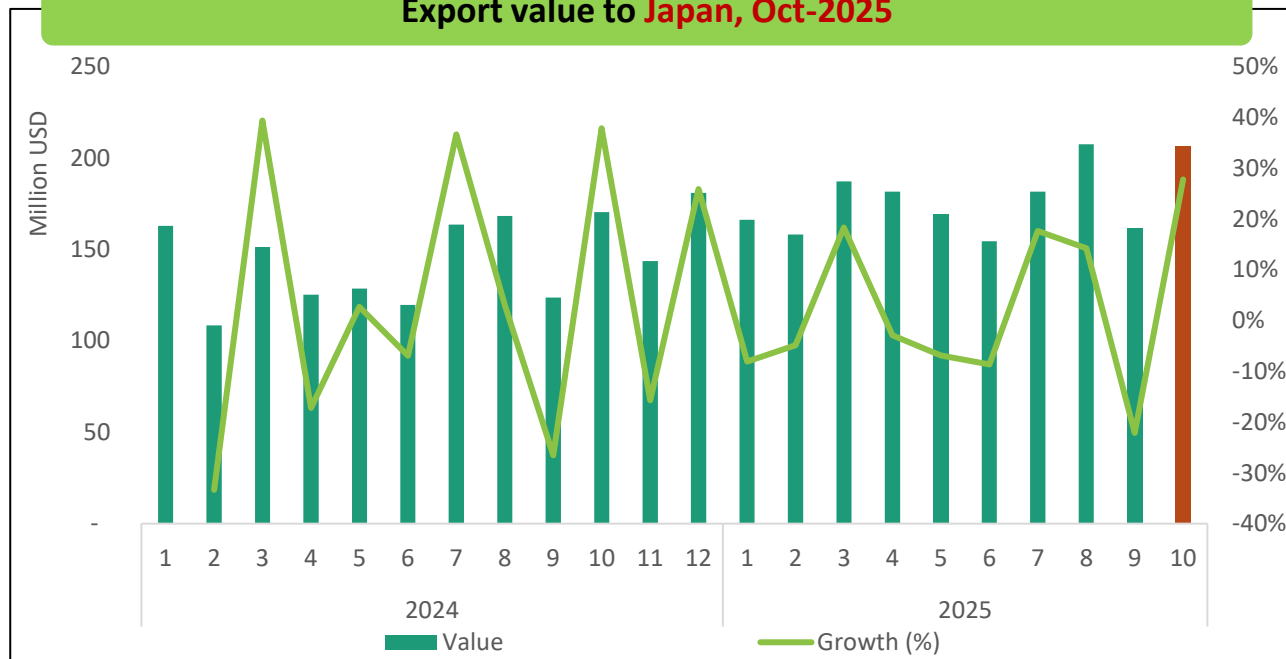
Source: vneconomy.vn





WOOD AND WOOD PRODUCTS

Export value to Japan, Oct-2025



Export results to Japan, Oct-2025



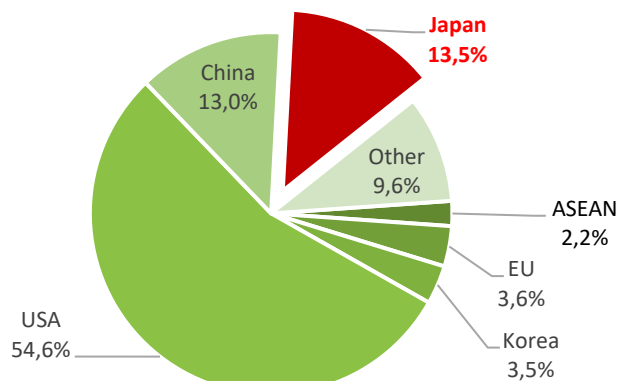
➔ Increase **27.8%** compared to Sep-2025

➔ Increase **21.2%** compared to Oct-2024

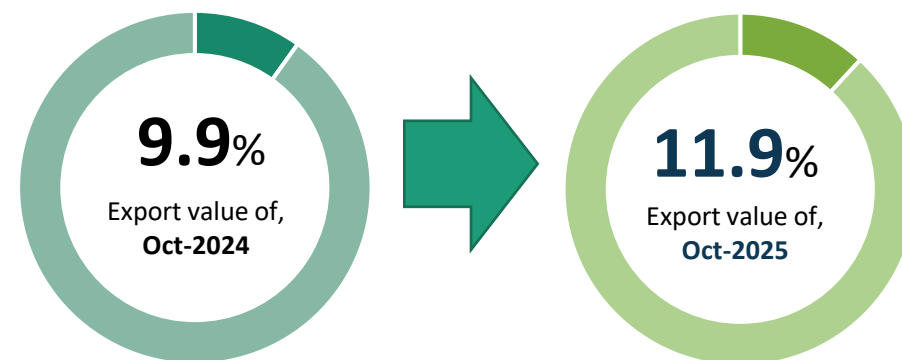
⬆ **60.9 million USD** more than the monthly average rate in 2024

❖ Accumulated 10 months of 2025 reaches **1.8 billion USD, 101.6%** of total 2024

Percentage of export value to Japan, Oct-2025



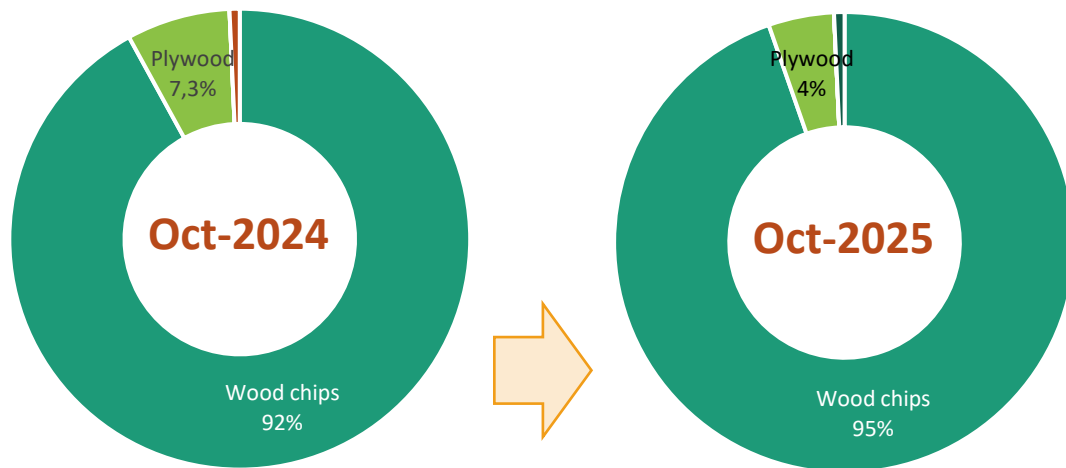
Changes in percentage of export value to Japan, Oct-2025





WOOD AND WOOD PRODUCTS

Structure of exports by products to Japan, Oct-2025



Export results to Japan, Oct-2025



Wood chips

Value: **152.8** million USD

Increase **39%** compared to Sep-2025

Increase **38%** compared to Oct-2024



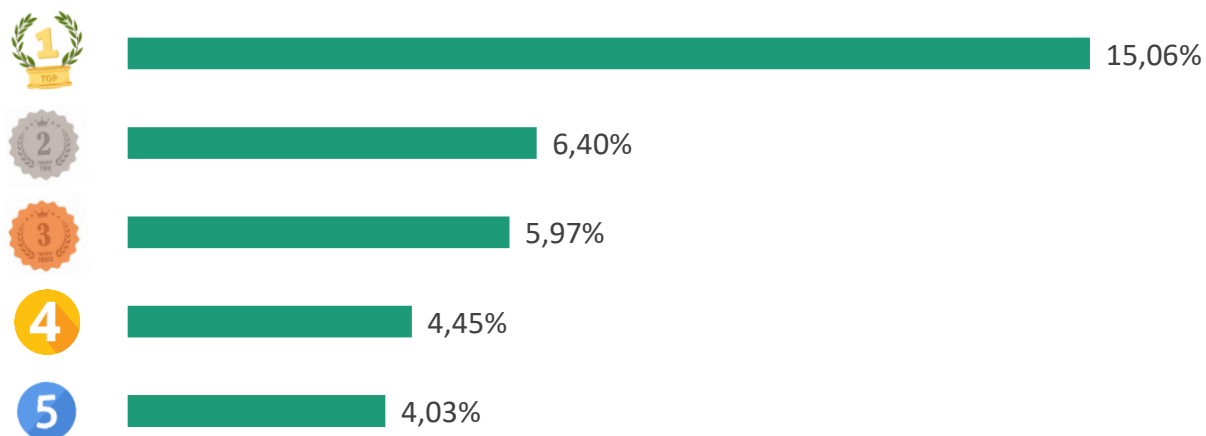
Plywood

Value: **7.4** million USD

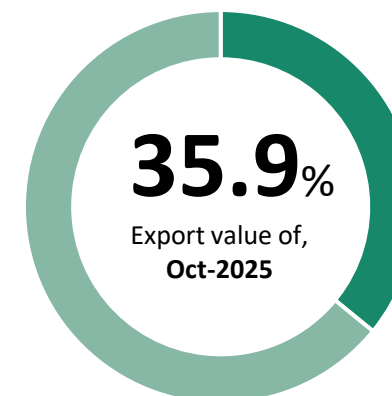
Increase **9%** compared to Sep-2025

Decrease **15%** compared to Oct-2024

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



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





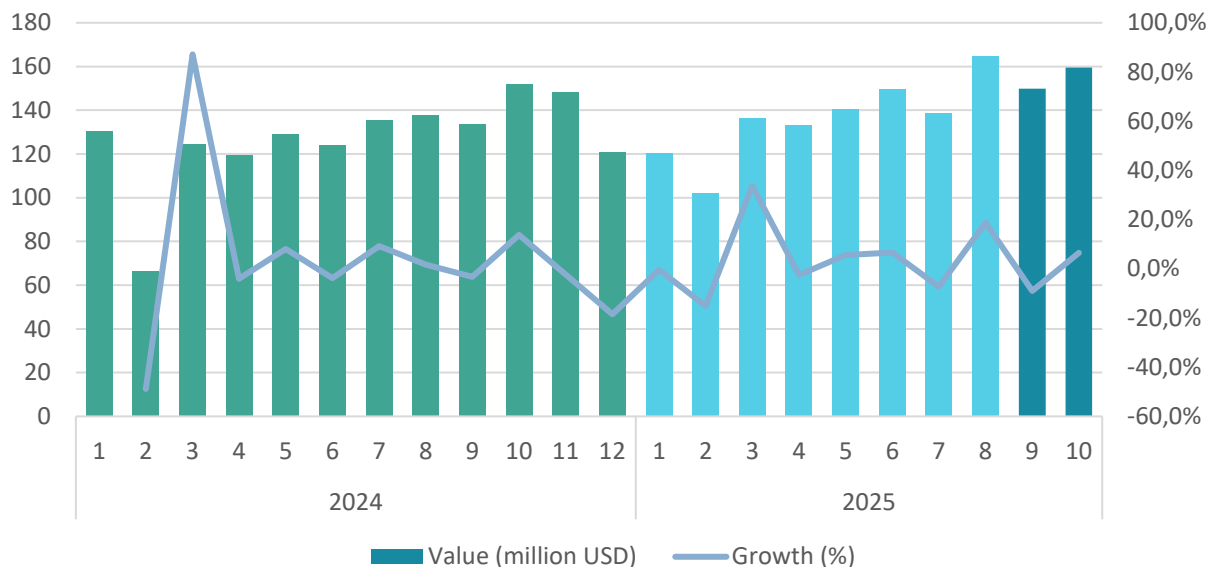
In October 2025, Japan's plywood market recorded an increase in import prices from major tropical supply sources, specifically Malaysia (film-faced formwork plywood 12mm reaching USD 600–610/m³ C&F) and Indonesia (Falcata-combined plywood ranging from USD 850–970/m³ depending on thickness). However, this rise in input costs contrasts with subdued domestic consumption; importers and downstream buyers remain cautious, purchasing only to meet actual demand due to exchange-rate pressures and sluggish construction activity. As a result, domestic softwood plywood producers face significant obstacles in their efforts to raise selling prices.

From a regulatory perspective, a notable development is the ongoing revision of the Japanese Agricultural Standards (JAS) by the Ministry of Agriculture, Forestry and Fisheries (MAFF). The reform aims to eliminate manual stamping and shift to ink-jet printing or coded labeling technologies to enhance traceability and prevent commercial fraud, with implementation expected from the summer of 2026.



FISHERIES

Export value to Japan, Oct-2025



Export results to Japan, Oct-2025

VALUE
159.6 million USD



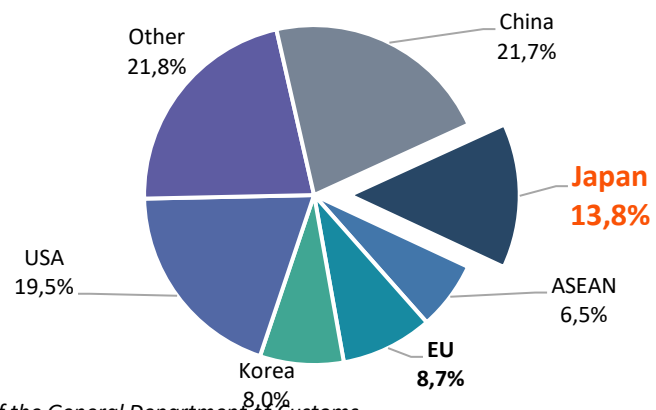
➤ Increase **6.4%** compared to Sep-2025

➤ Increase **5.1%** compared to Oct-2024

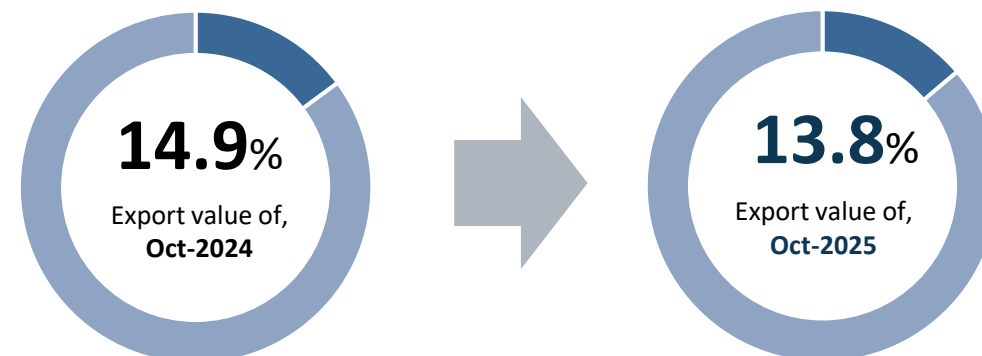
▲ **32.7** million USD more than the monthly average rate in 2024

❖ Accumulated 10 months of 2025 reaches **1395.5** million USD, **91.6%** of total 2024

Percentage of export value to Japan, Oct-2025



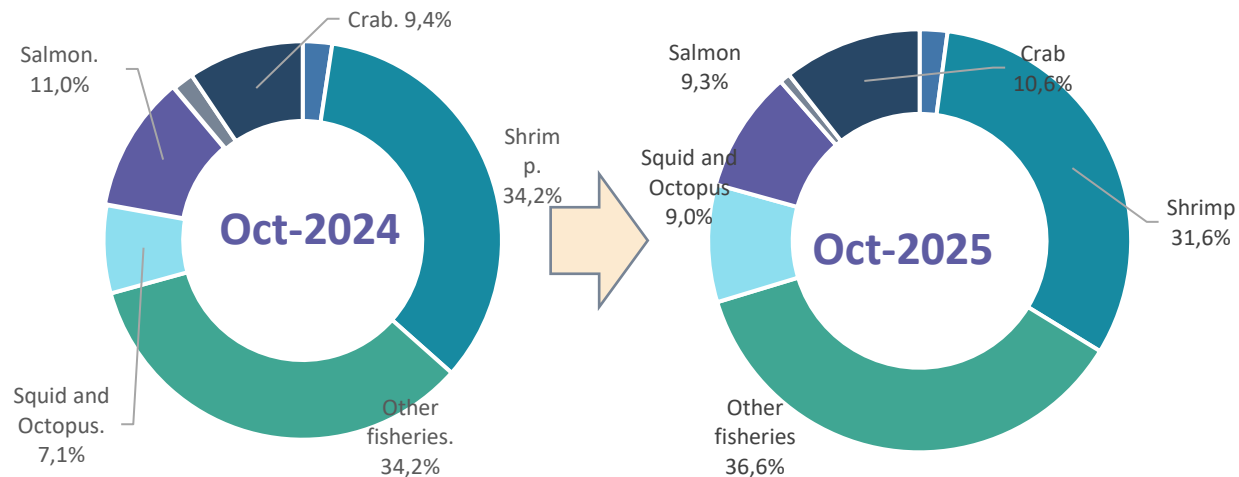
Changes in percentage of export value to Japan, Oct-2025



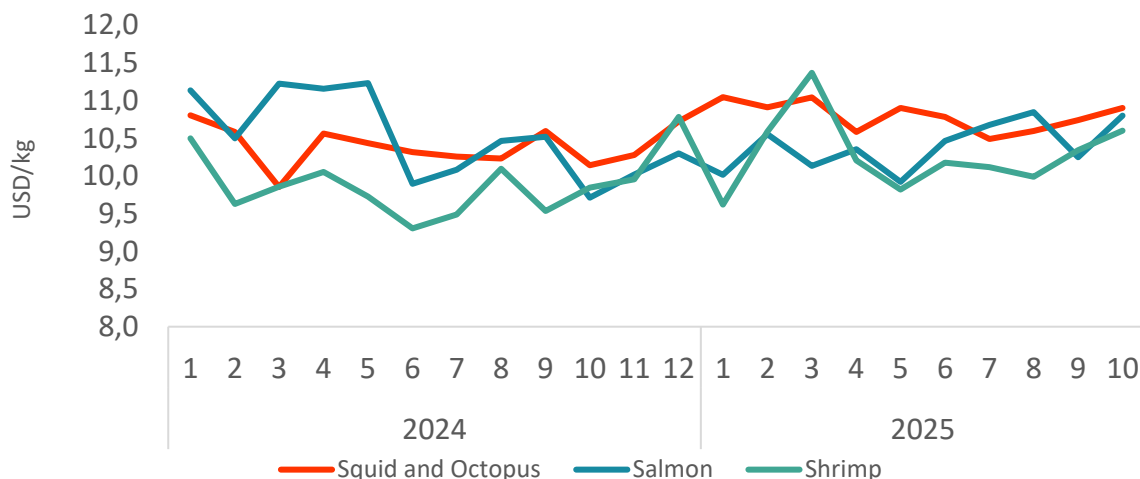


FISHERIES

Structure of exports by products to Japan, Oct-2025



Average export fisheries price to Japan, Oct-2025



Export results to Japan, Oct-2025



Salmon

Value: **14.8** million USD

Decrease **14.3%** compared to Sep-2025

Decrease **11.6%** compared to Oct-2024



Shrimp

Value: **50.5** million USD

Increase **4.6%** compared to Sep-2025

Decrease **2.8%** compared to Oct-2024



Squid and Octopus

Value: **14.3** million USD

Increase **7.2%** compared to Sep-2025

Increase **32.6%** compared to Oct-2024

Squid and Octopus

The average export price in Oct-2025 is **10,9 USD/kg**; Increase **1.1%** compared to previous month; and Increase **7.0%** compared to the same month of 2024.

Salmon

The average export price in Oct-2025 is **10,8 USD/kg**; Increase **5.1%** compared to previous month; and Increase **10.9%** compared to the same month of 2024.

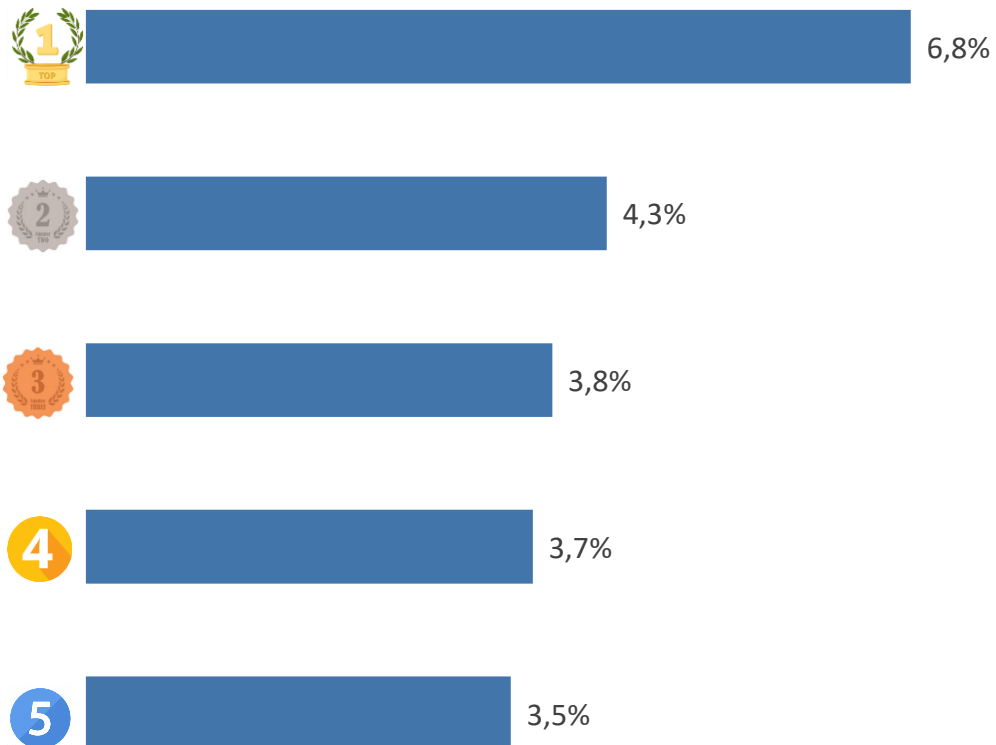
Shrimp

The average export price in Oct-2025 is **10.6 USD/kg**; Increase **2.2%** compared to previous month; and Increase **7.4%** compared to the same month of 2024.

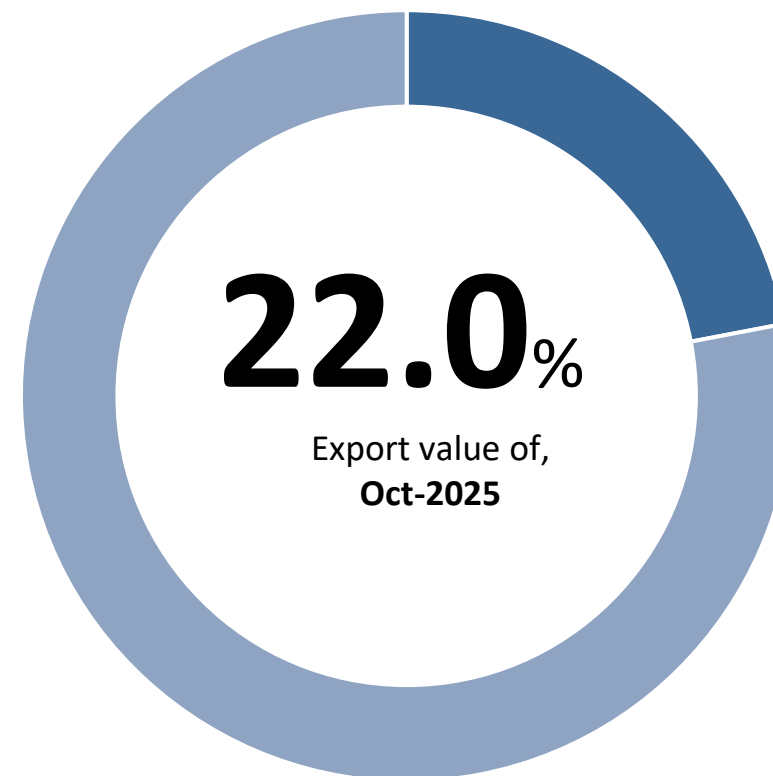


FISHERIES

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



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



Hong Kong bans imports of seafood from 10 Japanese prefectures over radiation safety concerns:

On 28 November 2025, the Hong Kong SAR Government announced a ban on all imports of seafood, sea salt, and seaweed originating from 10 Japanese prefectures—Tokyo, Fukushima, Ibaraki, Miyagi, Chiba, Gunma, Tochigi, Niigata, Nagano, and Saitama. The measure was introduced in response to Japan's continued discharge of treated radioactive wastewater from the Fukushima Daiichi nuclear power plant into the ocean. The ban was enacted under the Food Safety Order issued by Hong Kong's Centre for Food Safety (CFS) of the Food and Environmental Hygiene Department.

For seafood and seaweed products from other parts of Japan that are not covered by the ban, Hong Kong will strengthen oversight by conducting comprehensive radiation testing before the products are allowed to enter the market. Within the 24-hour period from noon on 27 November to noon on 28 November, the Centre for Food Safety tested 241 samples of imported Japanese food products and found no radiation levels exceeding permissible limits. Since 24 August 2023, Hong Kong has tested more than 183,800 imported Japanese food samples and 41,064 samples from local catches, all of which have met safety standards.

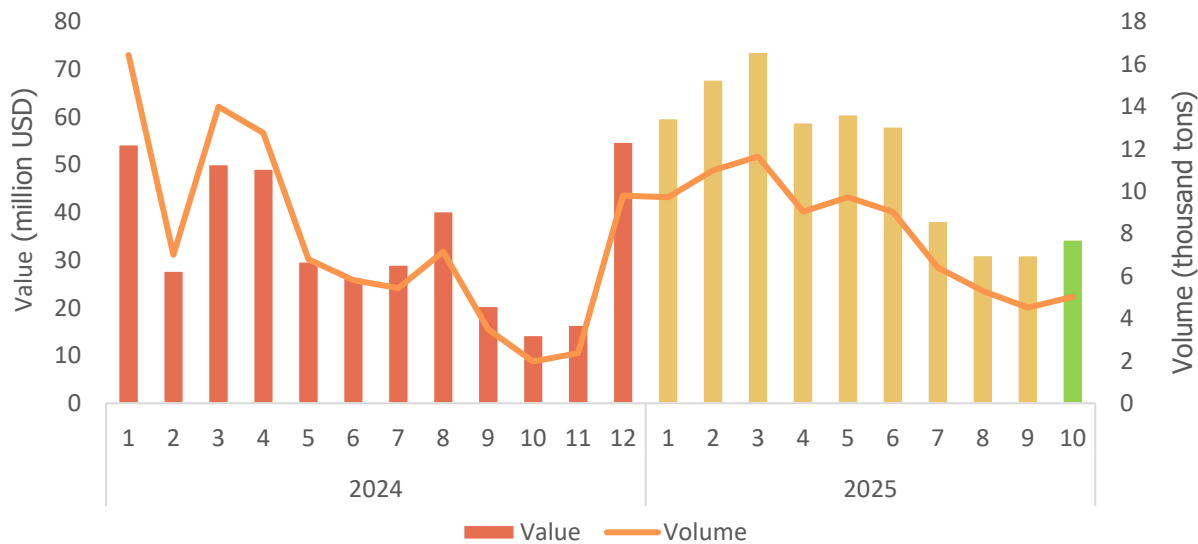
Source: Globaltime.cn



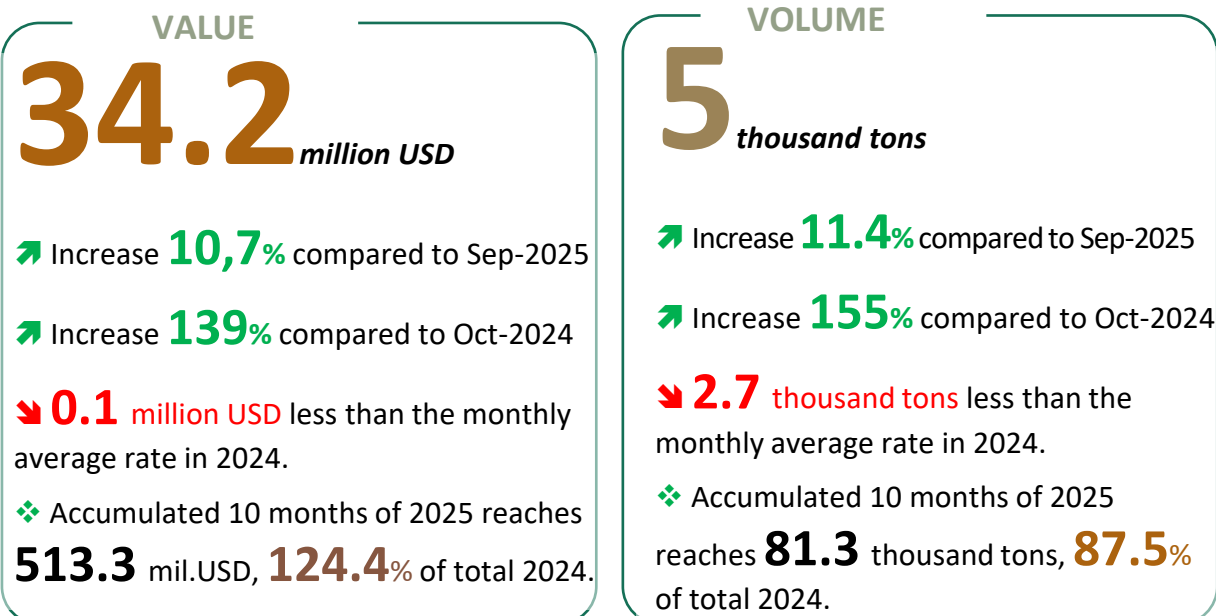


COFFEE

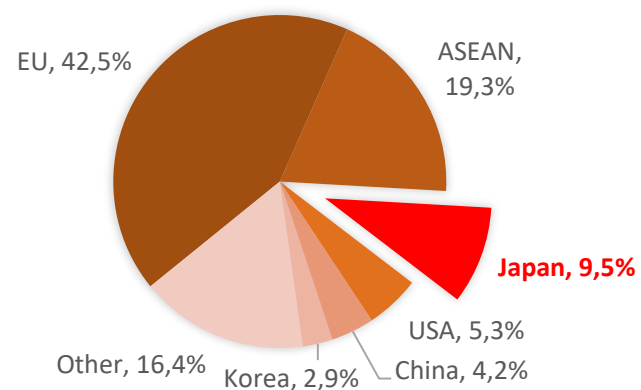
Export value and volume to Japan, Oct-2025



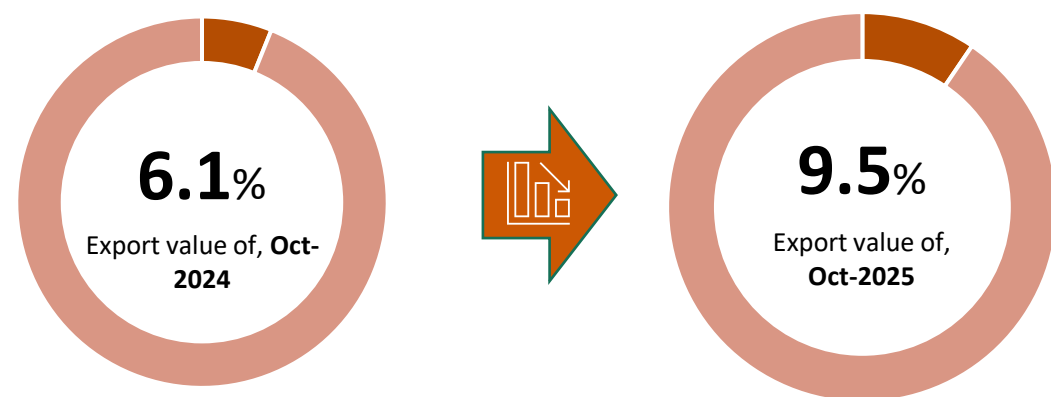
Export results to sang Japan, Oct-2025



Percentage of export value to Japan, Oct-2025



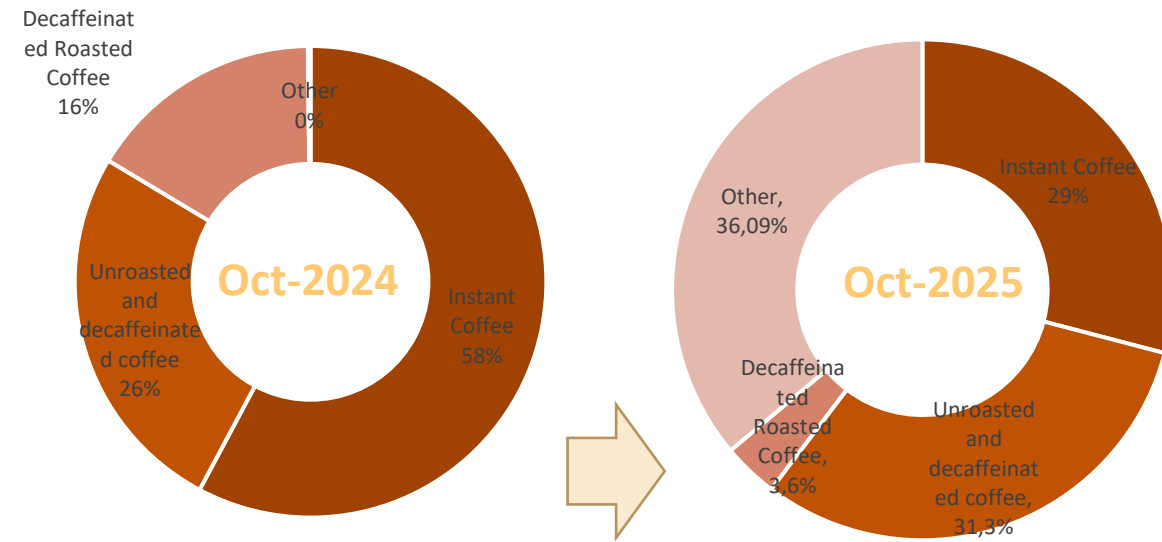
Changes in percentage of export value to Japan, Oct-2025



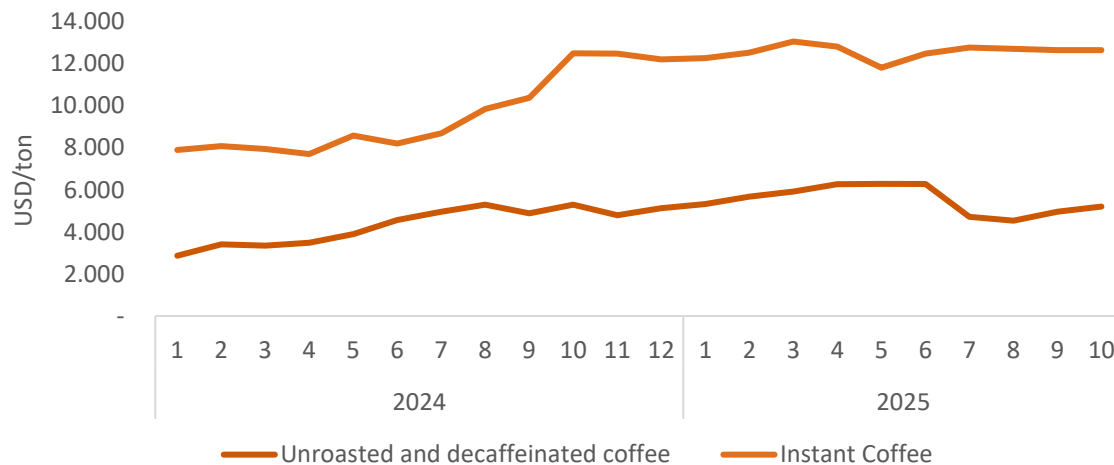
Source: Calculated from data of the General Department of Customs

COFFEE

Structure of exports by products to Japan, Oct-2025



Average export coffee price to Japan, Oct-2025



Source: Calculated from data of the General Department of Customs

Export results to Japan, Oct-2025



Unroasted and decaffeinated coffee

Value: **14.1** million USD

Increase **8.9%** compared to Sep-2025

Increase **333%** compared to Oct-2024



Instant Coffee

Value: **13.1** million USD

Decrease **4.1%** so compared to Sep-2025

Increase **82.4%** compared to Oct-2024



Decaffeinated Roasted Coffee

Value: **1.6** million USD

Decrease **13.4%** compared to Sep-2025

Decrease **19.8%** compared to Oct-2024

Instant Coffee

The average export price in Oct-2025 is **12,628** USD/ton, decrease **0.1%** compared to previous month; and increase **1.2%** compared to the same month of 2024.

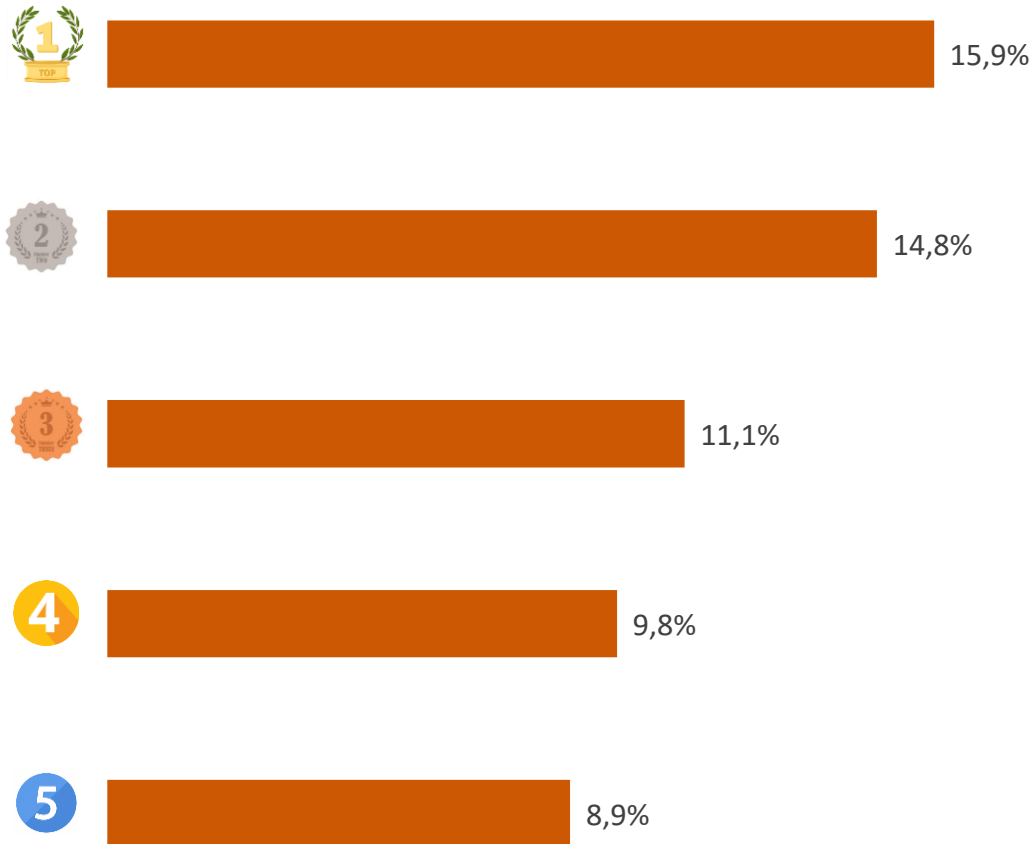
Unroasted and decaffeinated coffee

The average export price in Oct-2025 is **5,193** USD/ton; increase **4.8%** compared to previous month; and decrease **1.9%** compared to the same month of 2024.

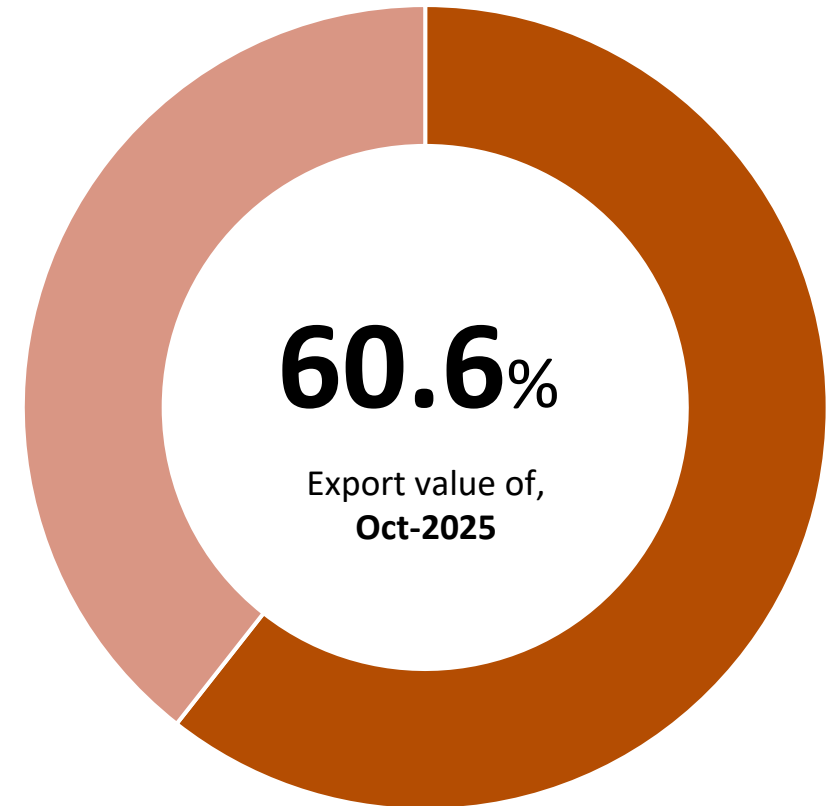


COFFEE

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



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





Japanese-style coffee chains are accelerating expansion into India and Southeast Asia to compete with Starbucks, targeting middle-class and affluent consumers who prefer table service, longer stays, dining, and working in-store. Coffee-Kan (under C-United) plans to open its first store in India around 2027 and aims for 60 outlets across India and Southeast Asia by 2030, with average spending in India expected to exceed 2,000 yen per customer—double the level in Japan. This expansion comes as India's coffee chain market is growing rapidly; Starbucks remains the leader but offers counter service only, while full-service cafés are seen as having substantial room for growth as the share of middle- to upper-income consumers is projected to surpass 40% of the population by 2030. Doutor Nichires Holdings is preparing to launch its Kanno Coffee concept overseas for the first time in Taiwan (March 2026), emphasizing matcha-based beverages, complementing its existing Hoshino Coffee network already present in Taiwan and the Philippines. Komeda is also accelerating its expansion in Taiwan and Indonesia, raising its overseas store count to around 80 (compared with 18 at the start of 2021), reflecting a broader wave of Japanese coffee brands “exporting not just products but the entire café ambiance and service culture” to the region.





FRUITS & VEGETABLES (EXPORT)

Export value to Japan, Oct-2025



Export results to Japan, Oct-2025

VALUE

18.6

million USD

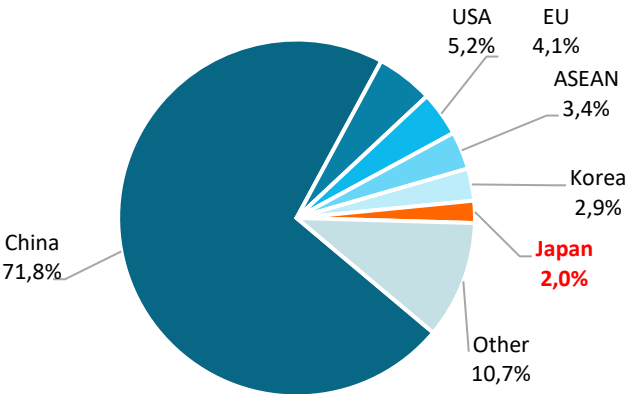
Decrease **2.9%** compared to Sep-2025

Increase **1.9%** compared to Oct-2024

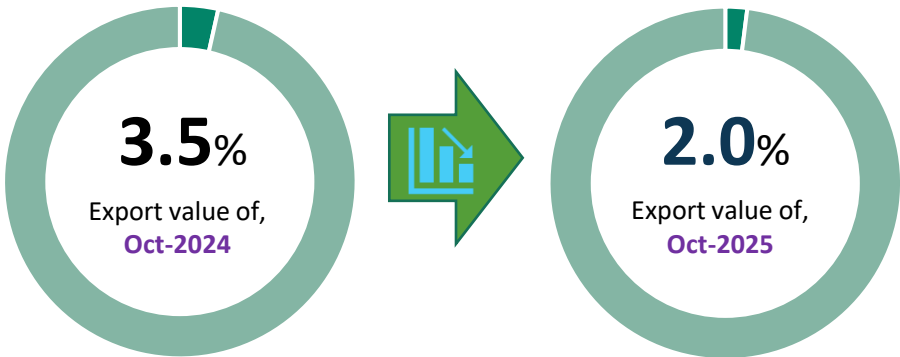
1.7 million USD more than the monthly average rate in 2024

Accumulated 10 months of 2025 reaches **201.2 million USD**, **99.0%** of total 2024

Percentage of export value to Japan, Oct-2025



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

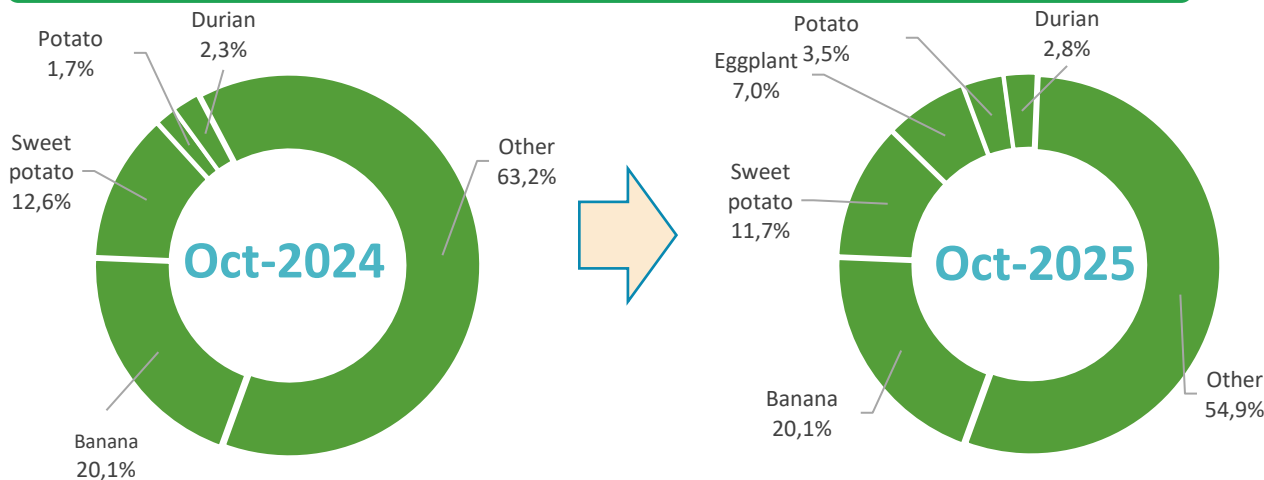


Source: Calculated from data of the General Department of Customs



FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to Japan, Oct-2025



Sweet potato

Value: **2.2** million USD
Decrease **10.0%** compared to Sep-2025
Decrease **5.8%** compared to Oct-2024



Eggplant

Value: **1.3** million USD
Decrease **4.4%** compared to Sep-2025



Potato

Value: **1.1** million USD
Decrease **17.4%** compared to Sep-2025
Increase **106.8%** compared to Oct-2024

Export results to Japan, Oct-2025



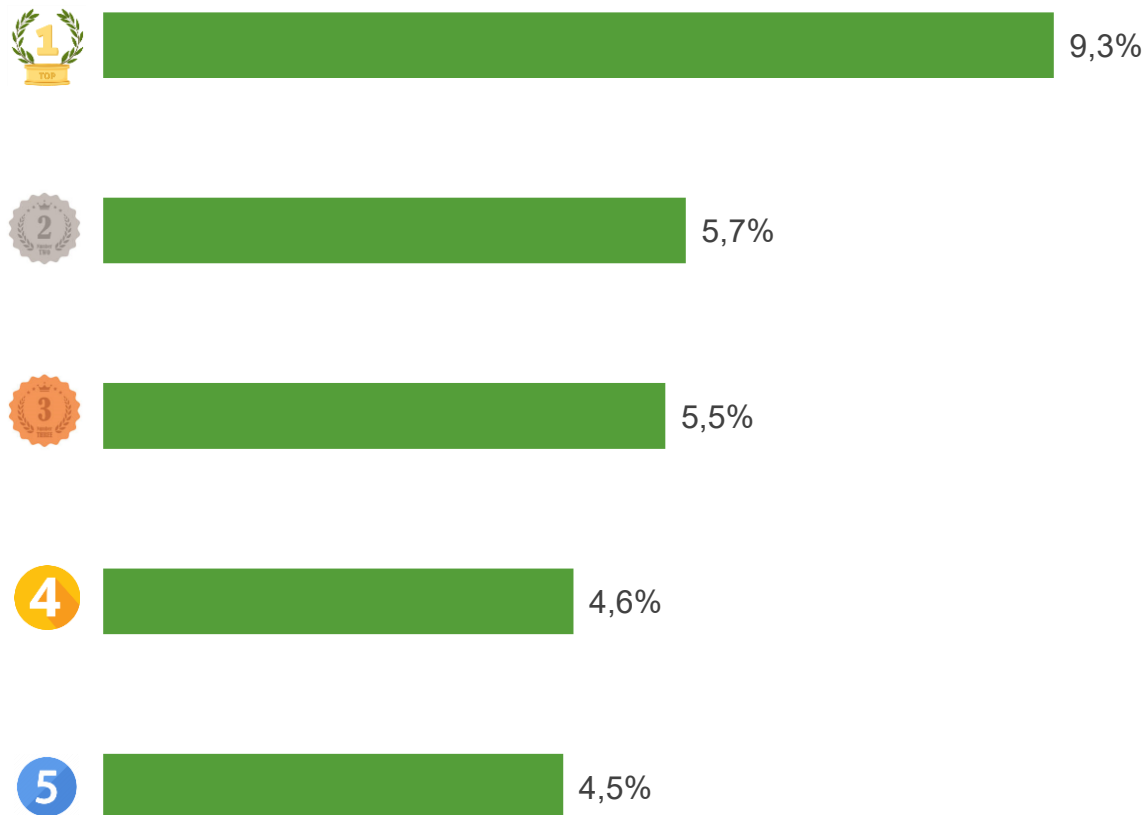
Banana

Value: **3.7** million USD
Increase **3.4%** compared to Sep-2025
Increase **1.9%** compared to Oct-2024

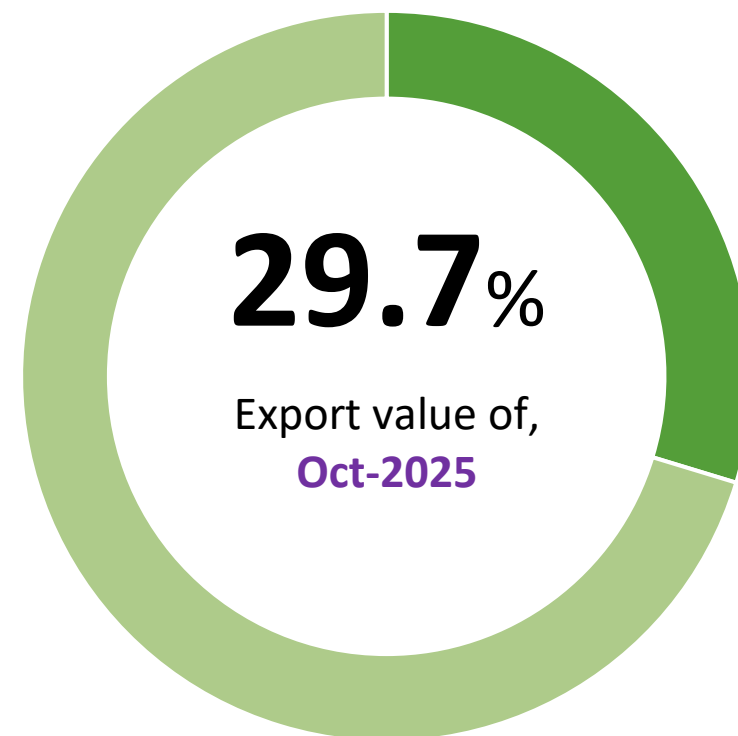


FRUITS & VEGETABLES (EXPORT)

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



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





FRUITS AND VEGETABLES (IMPORT)

Import value from Japan, Oct-2025



Import results from Japan, Oct-2025



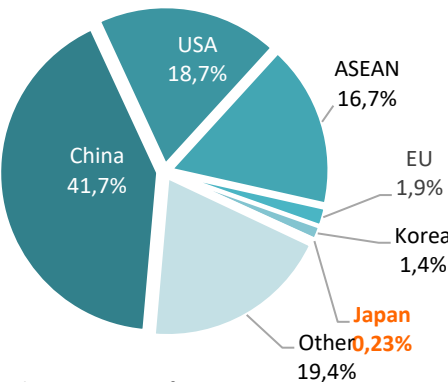
Increase **15.2%** compared to Sep-2025

Increase **19.1%** compared to Oct-2024

6.4 nghìn USD more than the monthly average rate in 2024

Accumulated 10 months of 2025 reaches **4.2 million USD**, **62.9%** of total 2024

Percentage of import value from Japan, Oct-2025



Changes in percentage of import value from Japan, Oct-2025



Source: Calculated from data of the General Department of Customs



Japan's import demand for blueberries is steadily rising

Japan's import value of blueberries has been increasing as consumers show a growing preference for health-oriented products and functional foods. In 2024, global blueberry import turnover reached USD 7.35 billion, up 30% from 2023. Japan ranked 26th, with a 6% increase. Blueberries are consumed in Japan in various forms, including fresh, frozen, dried, and as ingredients in juices, jams, and dietary supplements. Japan's major suppliers include the United States, Mexico, Chile, Canada, the United Kingdom, the United Arab Emirates, New Zealand, and China.

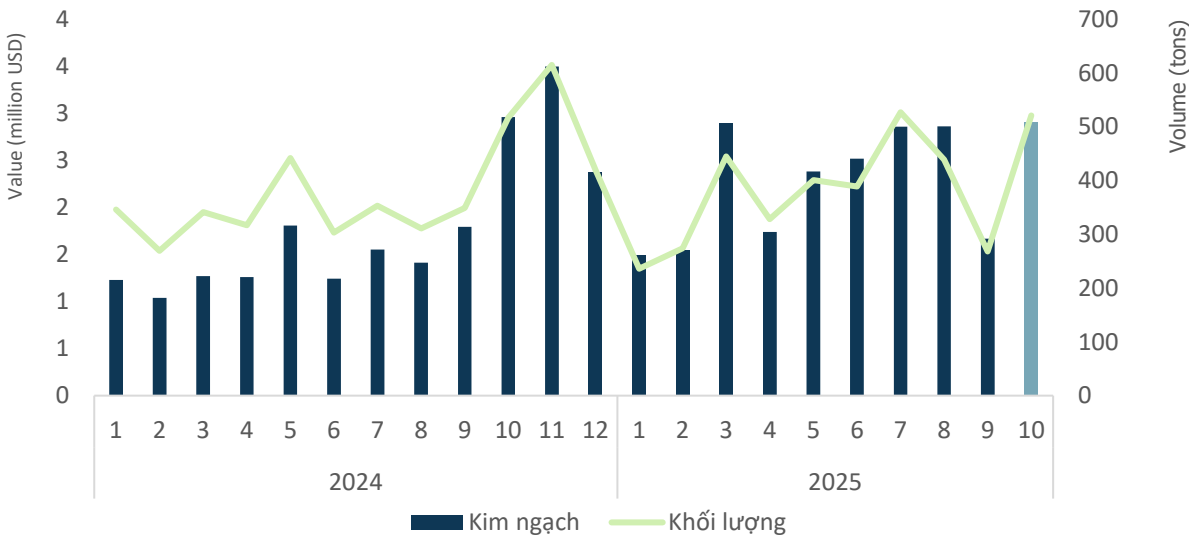
Source: Freshplaza.com



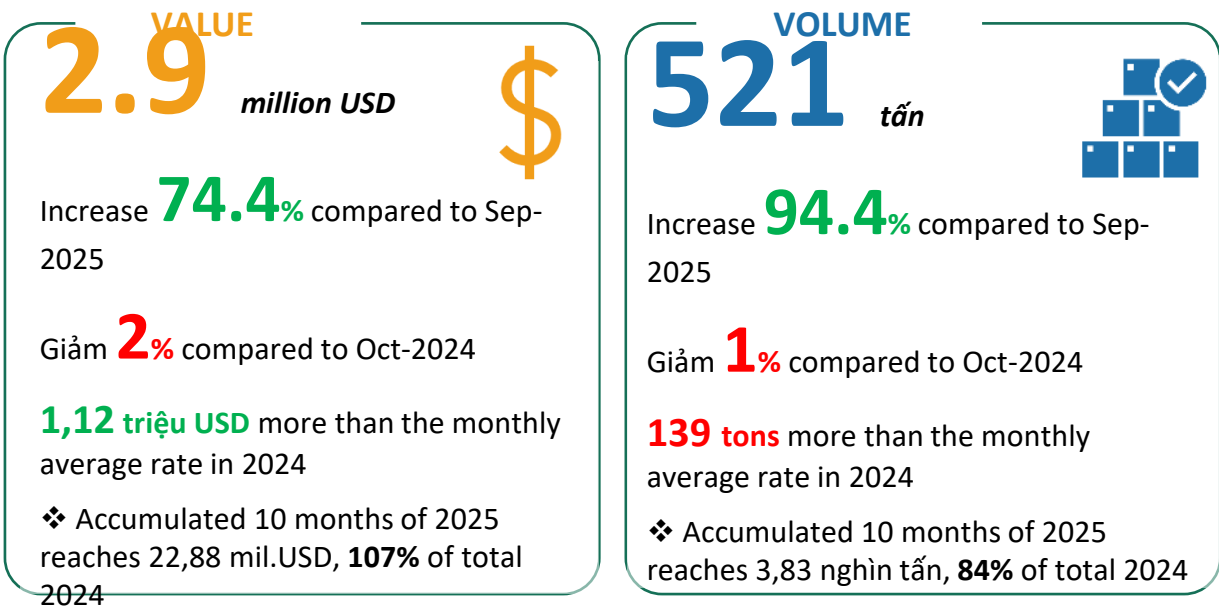


PEPPER

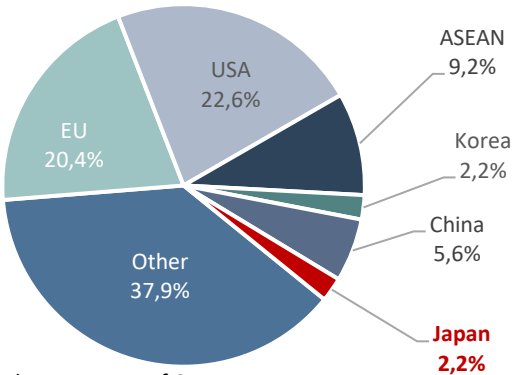
Export value and volume to Japan, Oct-2025



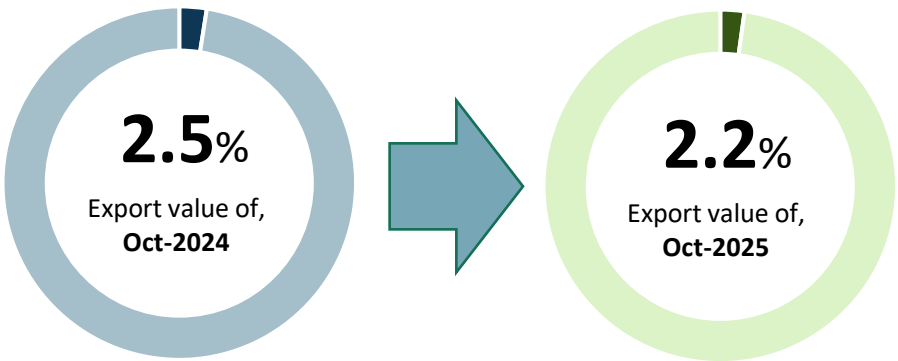
Export results to Japan, Oct-2025



Percentage of export value to Japan, Oct-2025



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

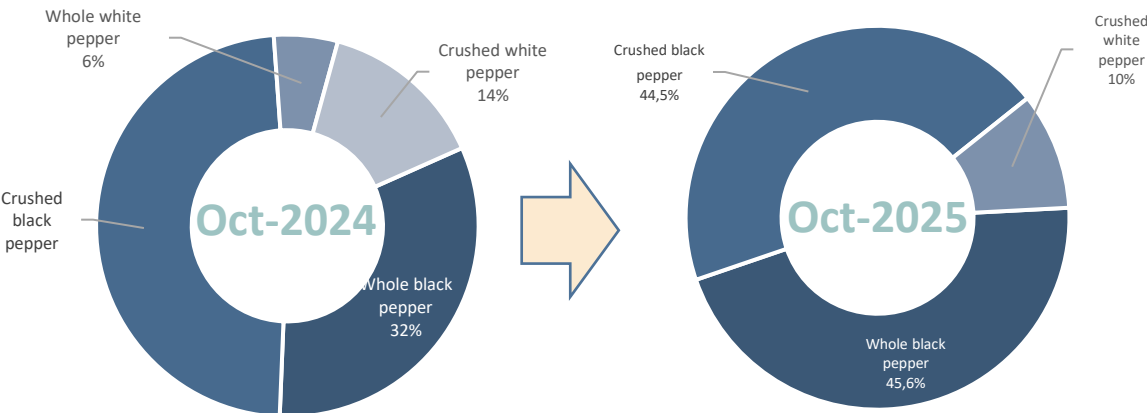


Source: Calculated from data of the General Department of Customs

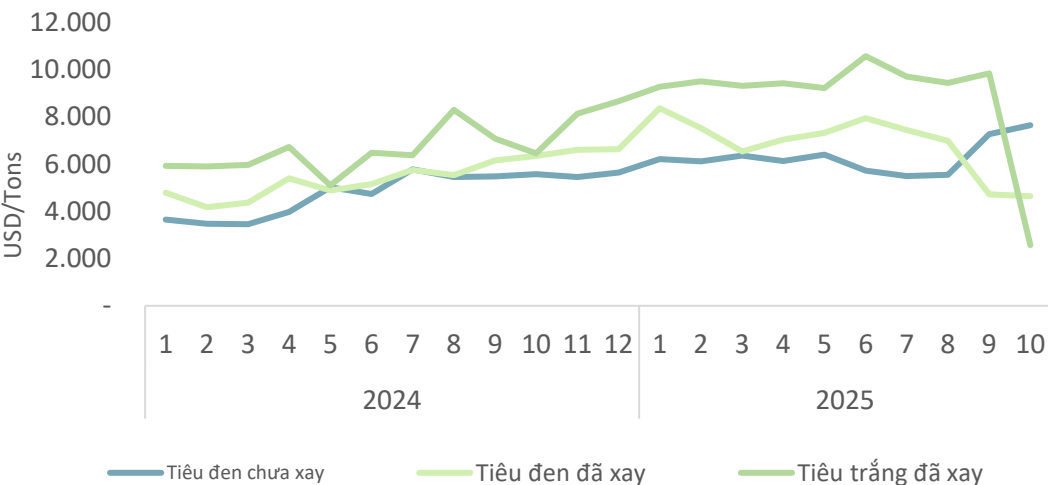


PEPPER

Structure of exports by products to Japan, Oct-2025



Average export pepper price to Japan, Oct-2025



Export results to Japan, Oct-2025



Crushed black pepper

Value: **1,224** million USD

Increase **99%** compared to Sep-2025

Giảm **14%** compared to Oct-2024



Whole black pepper

Value: **1,253** million USD

Increase **25%** compared to Sep-2025

Increase **31%** compared to Oct-2024

Whole black pepper

The average export price in Oct-2025 is **7.644** USD/ton; Increase **5,2%** compared to previous month; and giảm **9,1%** compared to the same month of 2024.

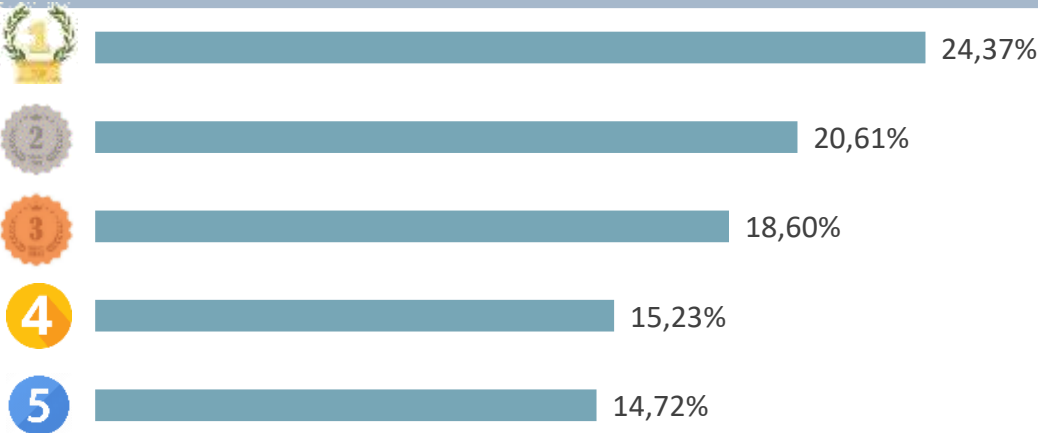
Crushed black pepper

The average export price in Oct-2025 is **4.633** USD/ton; Decrease **1,7%** compared to previous month; and Increase **9,7%** compared to the same month of 2024.



PEPPER

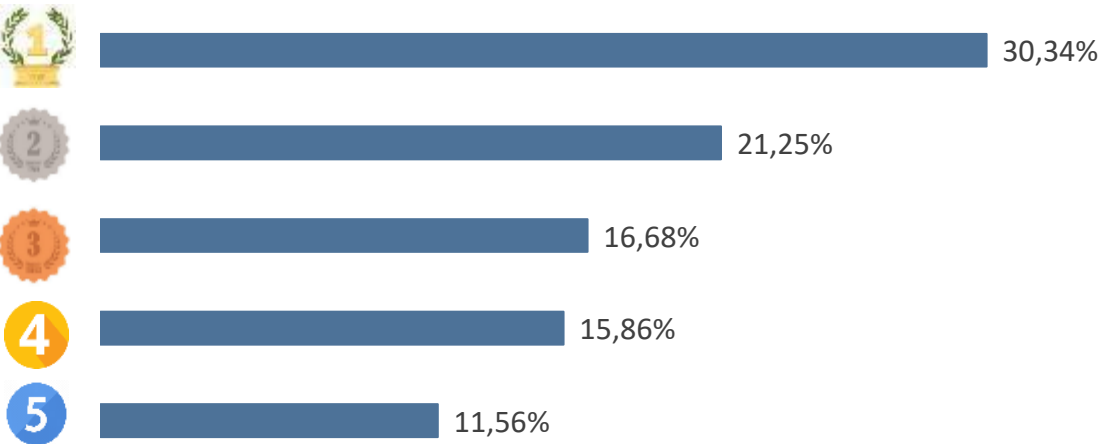
TOP 5 export enterprises by value to Japan, Oct-2025



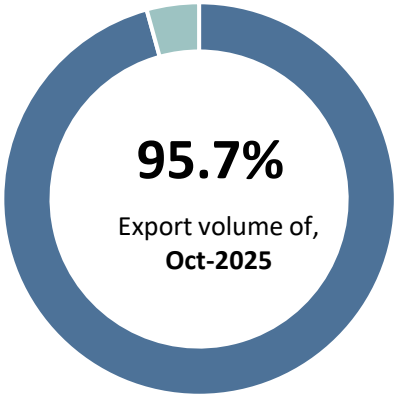
Value ratio of TOP 5 export enterprises to Japan, Oct-2025



TOP 5 export enterprises by volume to Japan, Oct-2025



Volume ratio of TOP 5 export enterprises to Japan, Oct-2025

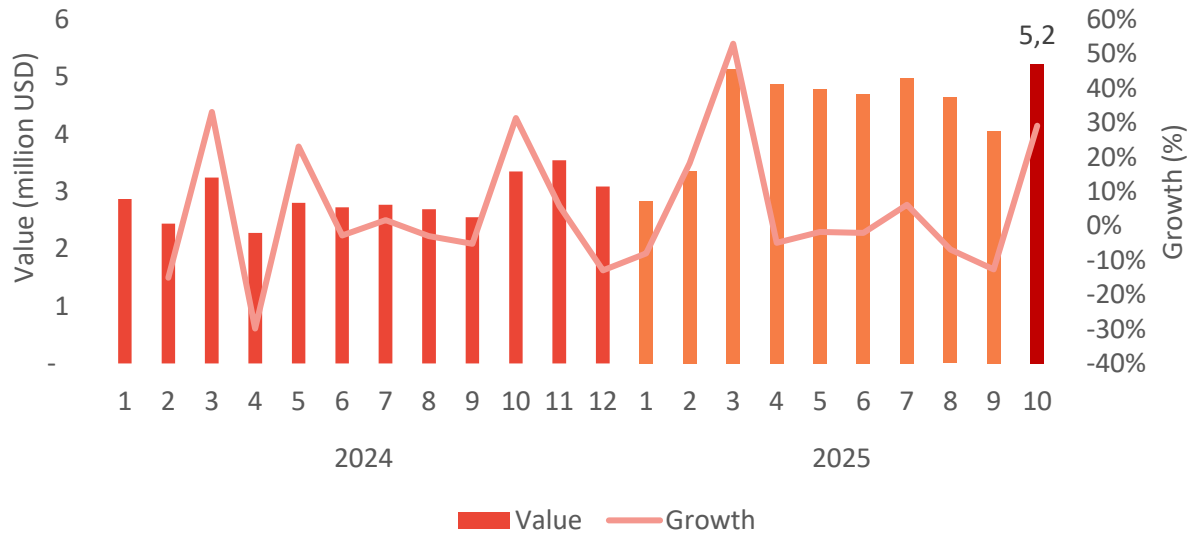


Source: Calculated from data of the General Department of Customs



MEAT AND MEAT PRODUCTS (EXPORT)

Export value to Japan, Oct-2025



Export results to Japan, Oct-2025



5.2
million USD

VALUE

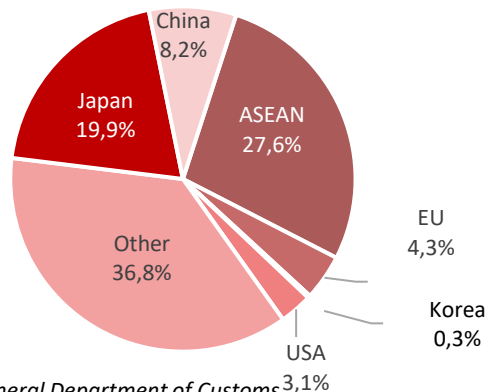
↗ Increase **29.1%** compared to Sep-2025

↗ Increase **56.1%** compared to Oct-2024

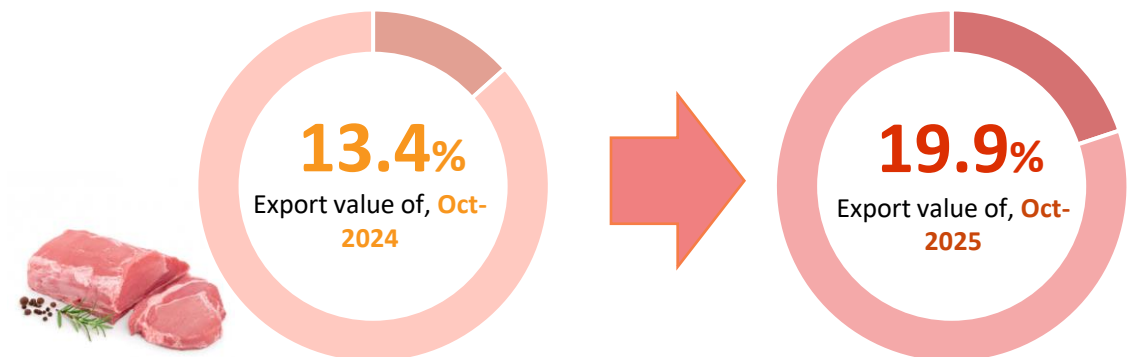
↗ **2.4 million USD** more than the monthly average rate in 2024

◇ Accumulated 10 months of 2025 reaches **44.6 million USD, 129.8%** of total 2024

Percentage of export value to Japan, Oct-2025



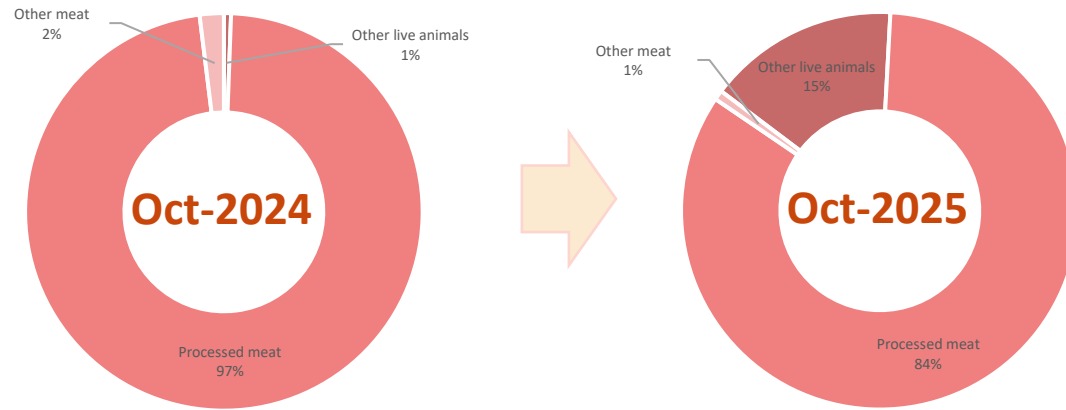
Changes in percentage of export value to Japan, Oct-2025



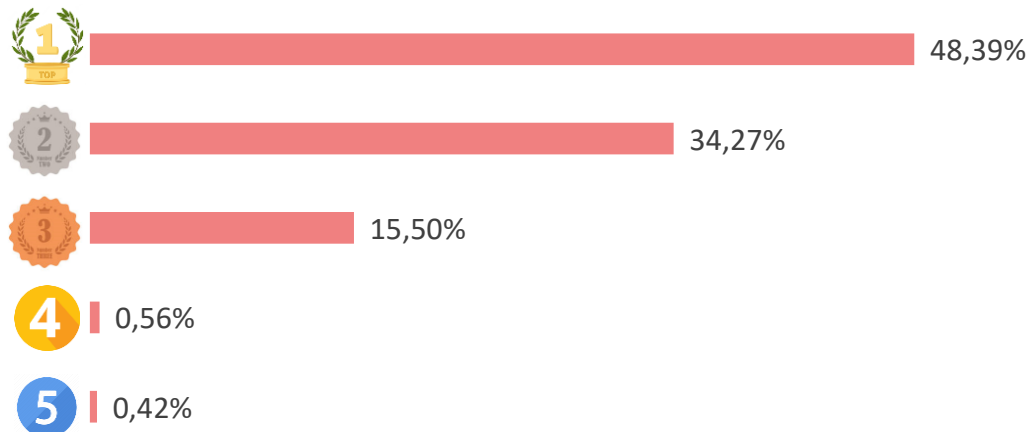


MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, Oct-2025



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



Export results to Japan, Oct-2025



Processed meat

Value: **4.37** million USD

Increase **11.66%** compared to Sep-2025

Increase **64.4%** compared to Oct-2024

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



MEAT AND MEAT PRODUCTS

SPOTLIGHTS



Japan is nearing a decision to open its market to Brazilian beef this year, after completing animal-health risk assessments and inspections of production conditions. Following an initial inspection in June, Japanese authorities will conduct a final review in November at Brazil's meat-processing plants. The WTO's recognition of Brazil as free from foot-and-mouth disease without vaccination has removed one of the major barriers, paving the way for Japan to potentially approve imports. According to Japanese assessments, the evaluation process is progressing on schedule, and a decision to open the market could be made within the year.

Source: vtv.vn





Any comments. please send to:

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