



**ISPAE**

**Volume: Dec-2025**

MONTHLY REPORT ON  
AGRI-PRODUCT EXPORT

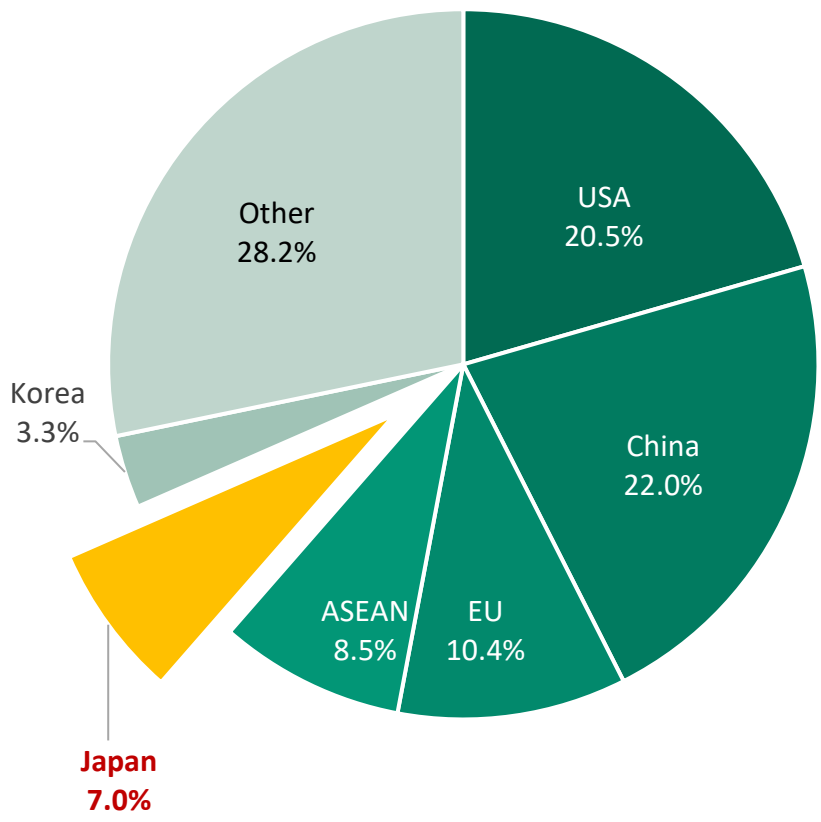
**FROM VIETNAM TO  
JAPAN MARKET**

Prepared by: **AGREINFOS**



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

Share of AFF product export to Japan in Nov-2025



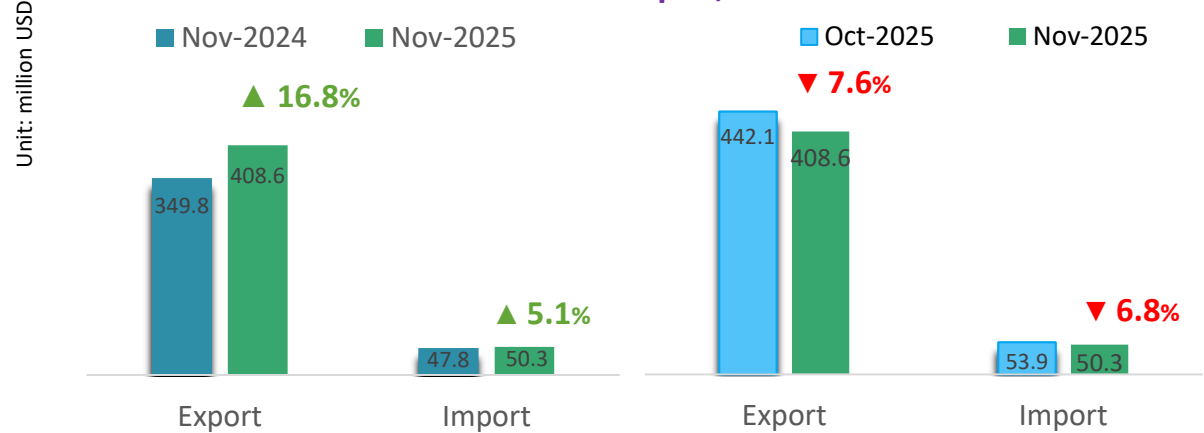
Changes in the share of AFF product export to Japan in Nov-2025 compared to Oct-2025 and Nov-2024

Market	Export value (million USD)	Compared to Oct-2025	Compared to Nov-2024
USA	1.191	▼ 0,9%	▼ 2,0%
China	1.276	▼ 5,5%	▲ 0,1%
EU	605	▲ 2,4%	▲ 2,5%
ASEAN	490	▲ 2,3%	▼ 2,2%
Japan	407	▼ 0,3%	▲ 0,5%
Korea	192	▲ 0,03%	▼ 0,7%
Total export	6.159		

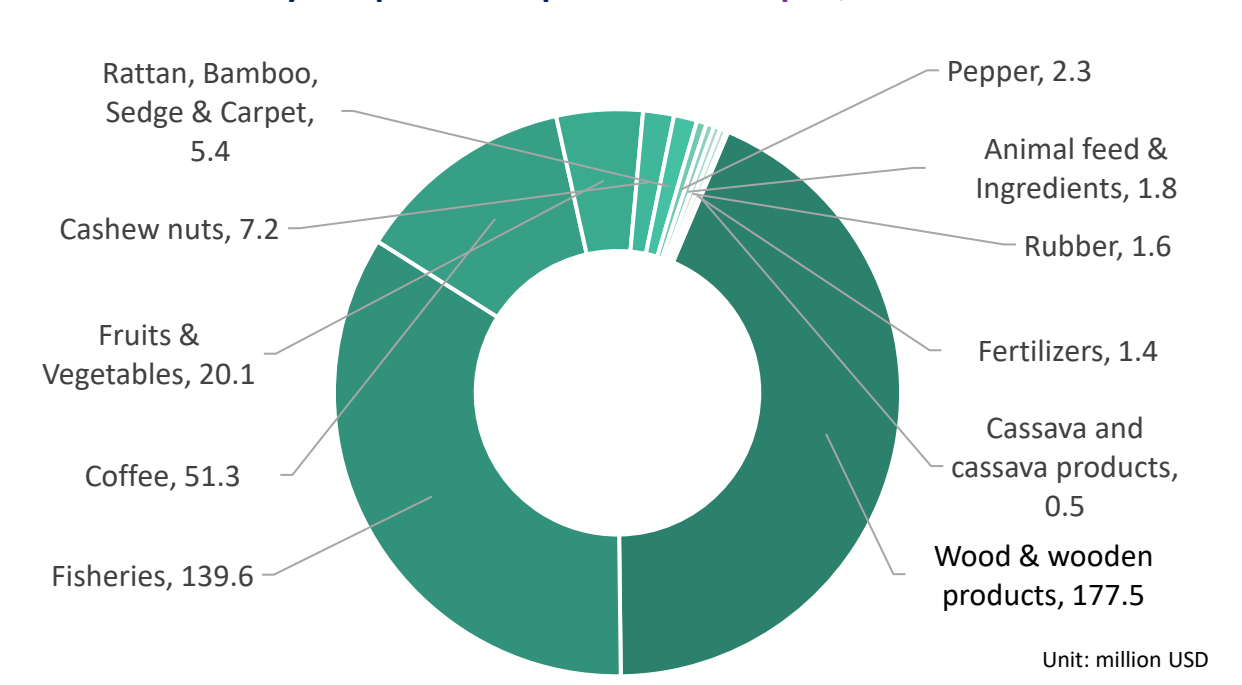
Source: Calculated from data of the Department of Customs

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

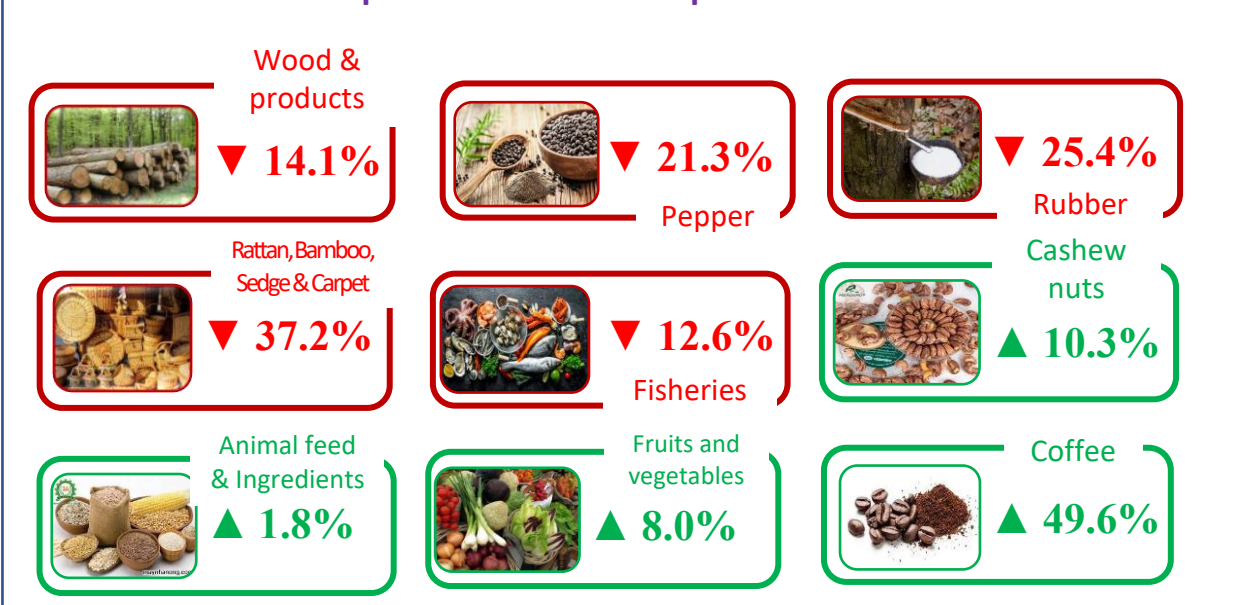
AFF product import-export value between Viet Nam and Japan, Nov-2025



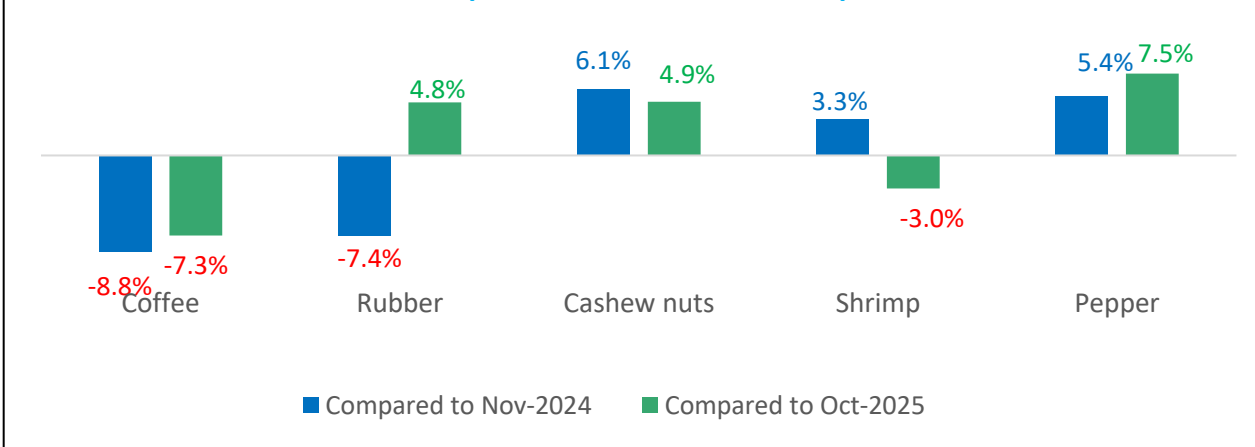
Key AFF product export value to Japan, Nov-2025



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



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



Source: Calculated from data of the General Department of Customs



## Japan: More than 20,000 items increase in price this year

In the context of the current escalating prices in Japan, a survey by a private company of 195 major food manufacturers shows that more than 20,000 items are food and groceries that have increased in price this year, up more than 60% from last year.

In terms of commodity, the price increase includes many types of products such as spices, beverages in general, processed

foods, etc. The common reason for the increase in prices by businesses is the significant increase in the price of raw materials and logistics costs.

Meanwhile, the number of food and beverage items expected to increase in price from now to April 2026 is currently only more than 1,000 items, much lower than the same period last year. Thus, the wave of price increases in Japan may temporarily cool down in the spring of next year.



Source: bnews.vn

## Economic impacts of China-Japan tensions

Sino-Japanese tensions escalated after the Japanese prime minister's remarks on Taiwan prompted Beijing to apply a series of economic retaliatory measures, including warnings to restrict travel and study abroad, stop seafood imports, postpone movie screenings and cancel performances by Japanese artists.

More than half a million air tickets were

canceled, the Japanese stock market fluctuated sharply and many large businesses lost value. Japan faces the risk of losing more than \$11.5 billion if the number of Chinese tourists continues to decline, while its efforts to diversify the market are difficult to fully compensate. China also bears the risk of a slowdown in bilateral trade amid the country's economic pressures.

This tension creates a ripple effect in the region, with countries such as Singapore, South Korea,

Thailand and India benefiting in the short term of attracting more tourists and export opportunities to replace Japan.



Source: thesaigontimes.vn





# WOOD AND WOOD PRODUCTS

## Export value to Japan, Nov-2025



## Export results to Japan, Nov-2025

### VALUE



177

million USD

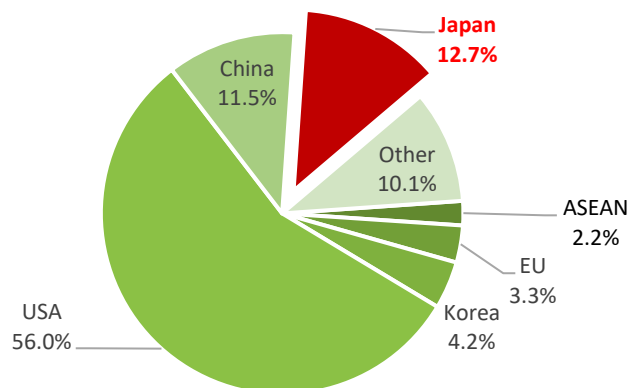
Decrease **14.1%** compared to Oct-2025

Increase **30.8%** compared to Nov-2024

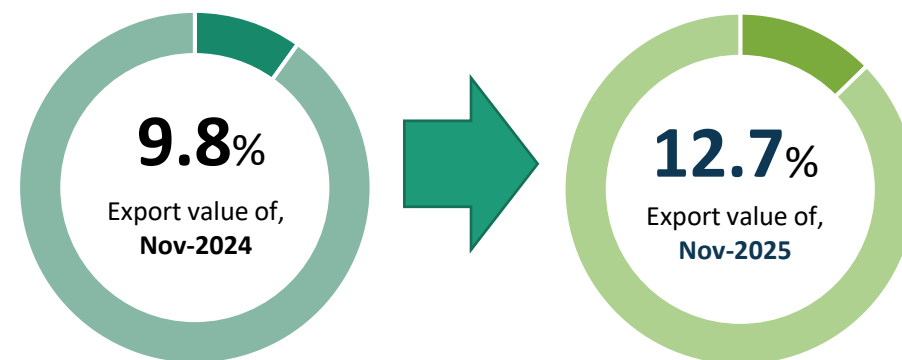
↑ **31.9 million USD** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **2.0** billion USD, **111.8%** of total 2024

## Percentage of export value to Japan, Nov-2025



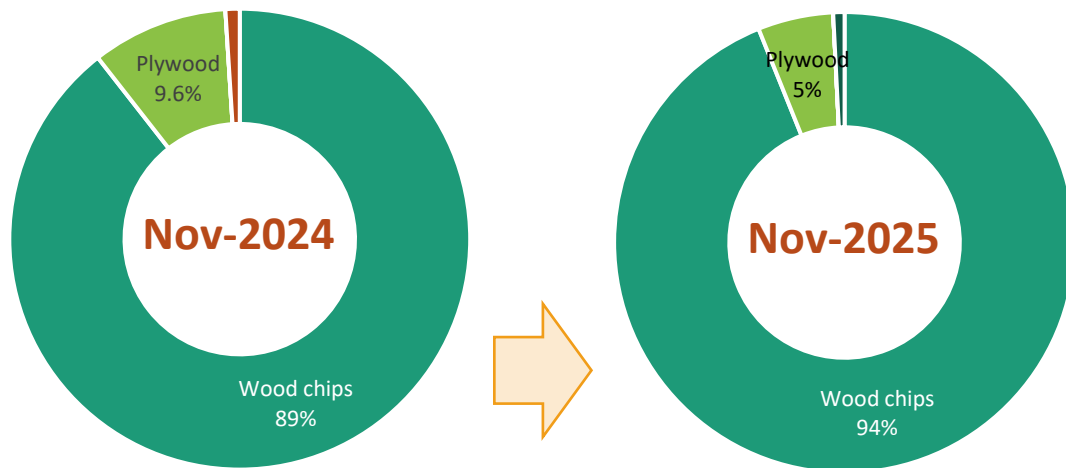
## Changes in percentage of export value to Japan, Nov-2025





# WOOD AND WOOD PRODUCTS

## Structure of exports by products to Japan, Nov-2025



## Export results to Japan, Nov-2025



### Wood chips

Value: **126.7** million USD

Decrease **17%** compared to Oct-2025

Increase **46%** compared to Nov-2024



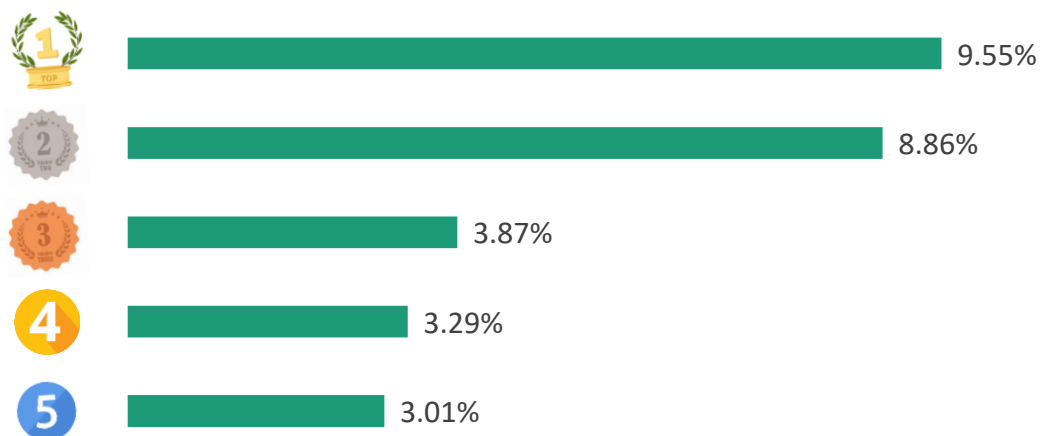
### Plywood

Value: **7.2** million USD

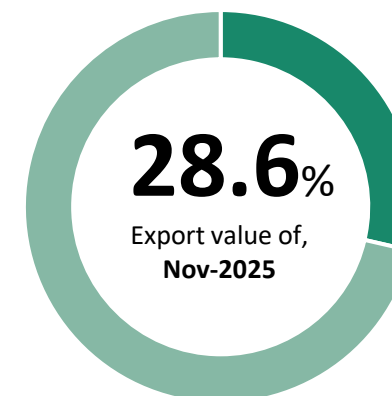
Decrease **4%** compared to Oct-2025

Decrease **23%** compared to Nov-2024

## TOP 5 export enterprises by value to Japan, Nov-2025



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







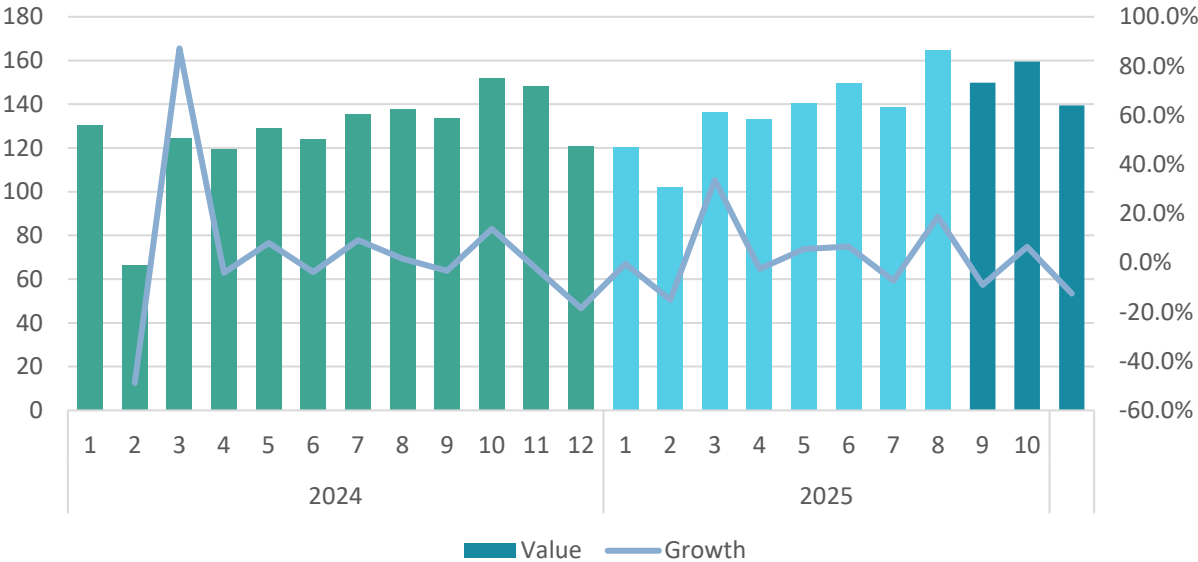
Japan's timber market in the second half of 2025 continues to be under great pressure from the weakening of the yen (152.87 JPY/USD) and inflation, causing import costs to increase and the actual demand for building materials (such as plywood) to remain calm due to the slowdown in new housing start-ups. Although consumer confidence shows signs of a slight recovery, Vietnamese exporters still face mixed volatility: Vietnam maintains its position as the second-largest supplier of kitchen furniture (27% market share) and bedroom (29%), but kitchen imports are declining amid fierce competition with the Philippines and China. While the wood furniture segment recorded a slight improvement in market share (to 14%). Notably, long-term barriers are gradually becoming apparent when the Japanese government proposes to sharply increase the forestry budget in 2026 and promote the "Forest Country, Timber City" strategy to maximize the use of domestic timber sources to replace imports and reduce emissions.





# FISHERIES

## Export value to Japan, Nov-2025



## Export results to Japan, Nov-2025

VALUE

**159.6** million USD

Decrease **12.6%** compared to Oct-2025

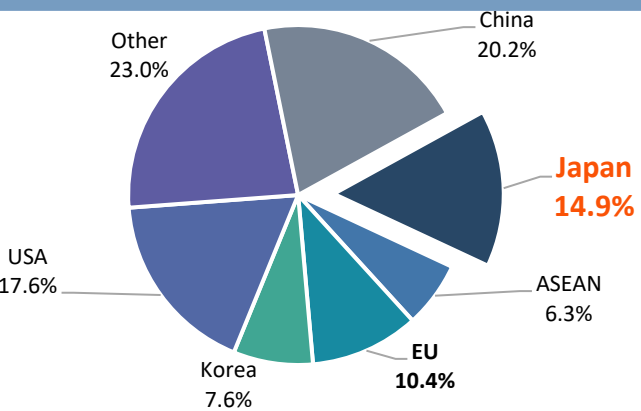
Decrease **5.8%** compared to Nov-2024

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

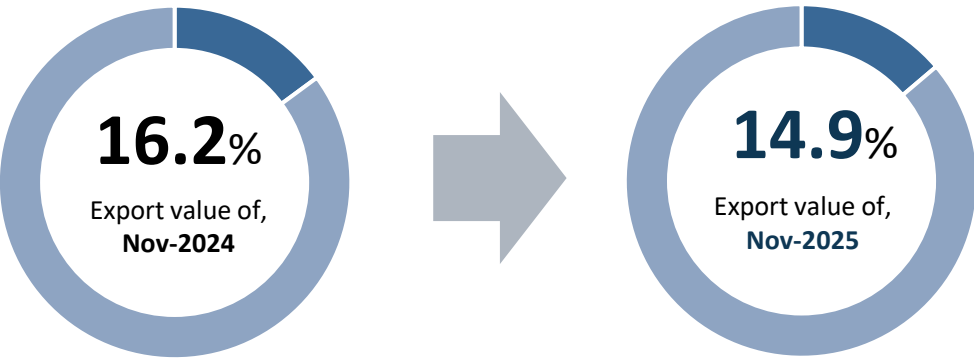
❖ Accumulated 11 months of 2025 reaches **1535.1** million USD, **100.8%** of total 2024

\$

## Percentage of export value to Japan, Nov-2025



## Changes in percentage of export value to Japan, Nov-2025



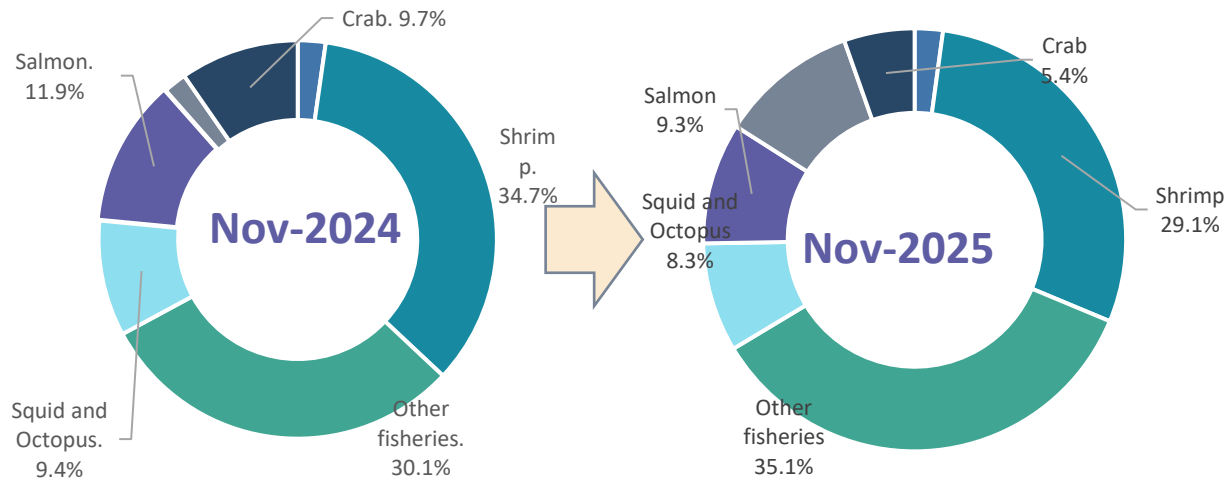
Source: Calculated from data of the General Department of Customs



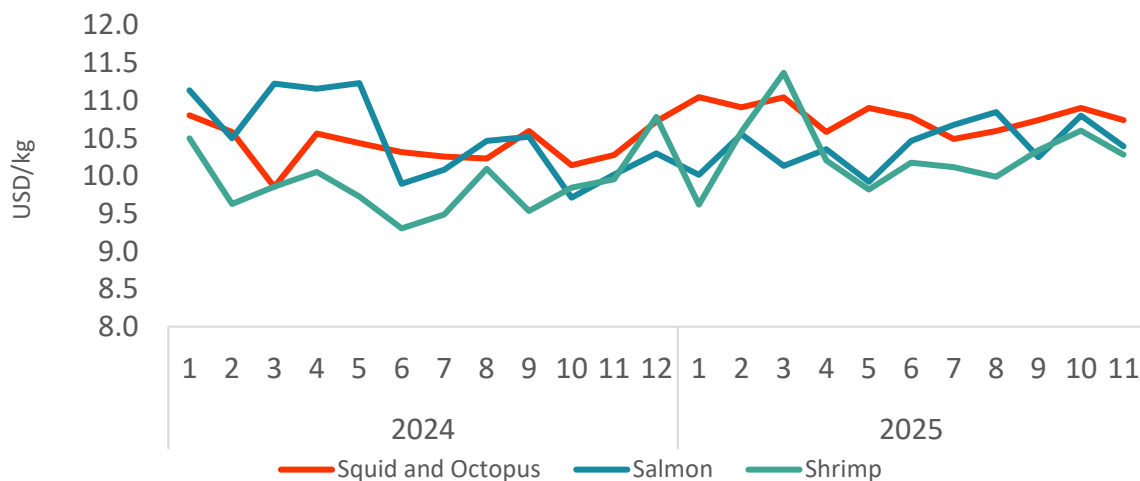


# FISHERIES

## Structure of exports by products to Japan, Nov-2025



## Average export fisheries price to Japan, Nov-2025



## Export results to Japan, Nov-2025



### Salmon

Value: **16.9** million USD  
Increase **14.0%** compared to Oct-2025  
Decrease **4.6%** compared to Nov-2024



### Shrimp

Value: **46.5** million USD  
Decrease **7.9%** compared to Oct-2025  
Decrease **9.7%** compared to Nov-2024



### Squid and Octopus

Value: **13.3** million USD  
Decrease **7.1%** compared to Oct-2025  
Decrease **4.4%** compared to Nov-2024

### Squid and Octopus

The average export price in Nov-2025 is **10.8** USD/kg; Decrease **0.6%** compared to previous month; and Increase **49%** compared to the same month of 2024.

### Salmon

The average export price in Nov-2025 is **10,4** USD/kg; Decrease **3.6** compared to previous month; and Increase **3.7%** compared to the same month of 2024.

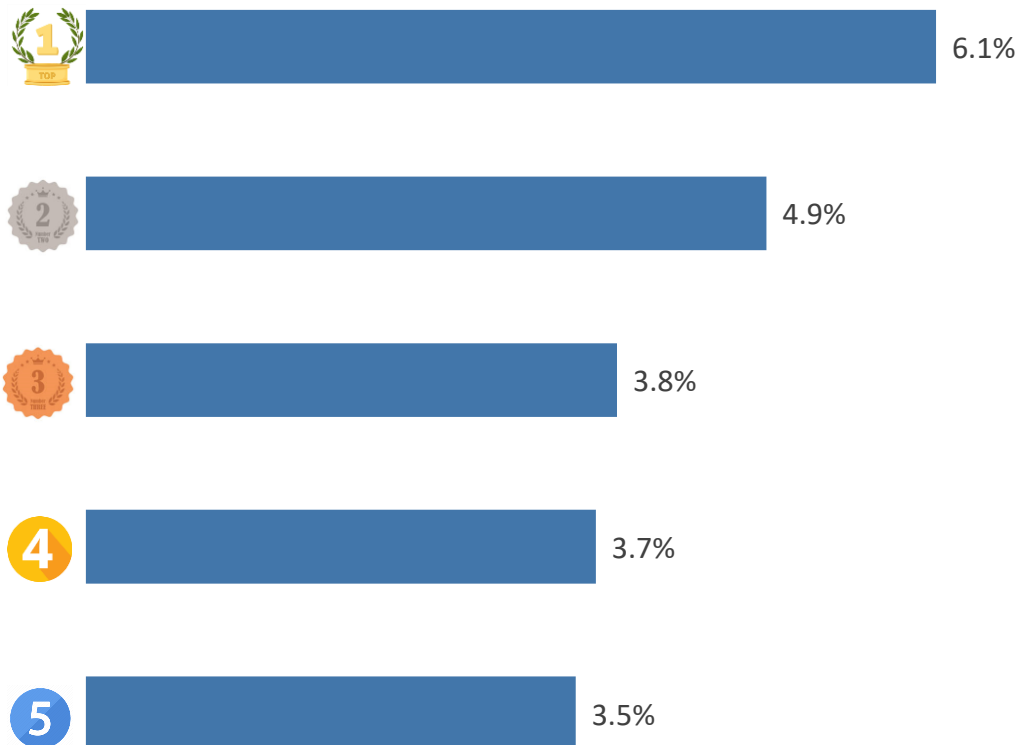
### Shrimp

The average export price in Nov-2025 is **10,3** USD/kg; Decrease **2.8** compared to previous month; and Increase **4.9%** compared to the same month of 2024.

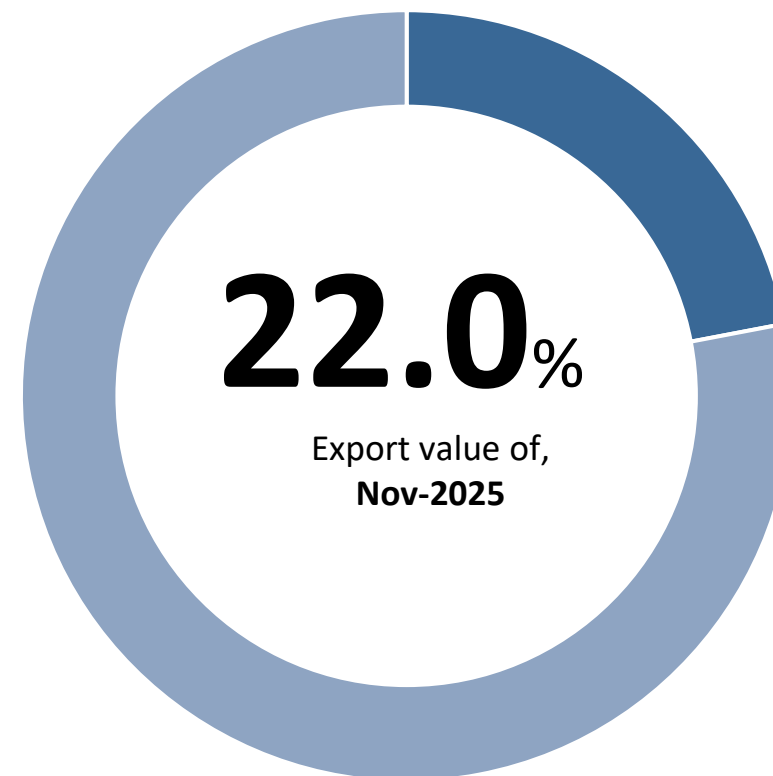


# FISHERIES

## TOP 5 export enterprises by value to Japan, Nov-2025



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



### Russia sharply increases seafood exports to Japan

In the first 9 months of 2025, Russia's seafood exports to Japan increased by 10% in both volume and value, reaching 89,000 tons with a turnover of 678 million USD. The four main product groups Russia sells to Japan include pollock, crabs, red salmon and some other seafood. In particular, pollock and processed products (surimi, fillets, roe) increased sharply, especially surimi increased by 50% in value. Frozen pollock also spiked 7 times in value. In the crustacean group, although the production of snow crabs and Kamchatka crabs has decreased, the value remains high. Similarly, Russian red salmon exports to Japan have more than doubled in value, reaching \$93 million.

Analysts say Russia is boosting seafood exports to Japan to reduce dependence on the Chinese market and improve added value, thereby strengthening its position in potential Asian markets.

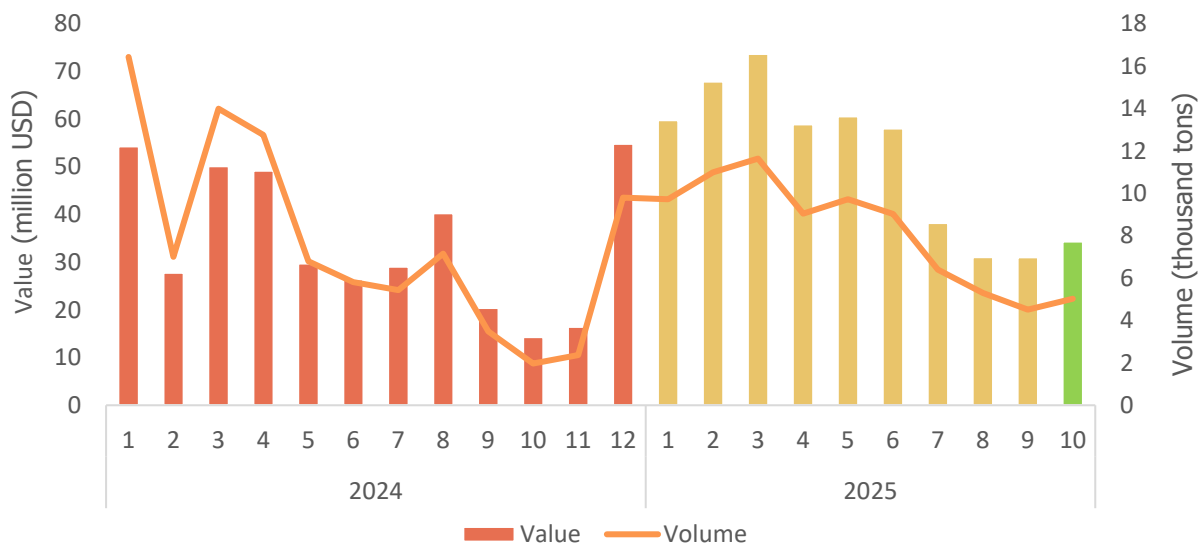
Source: Vasep



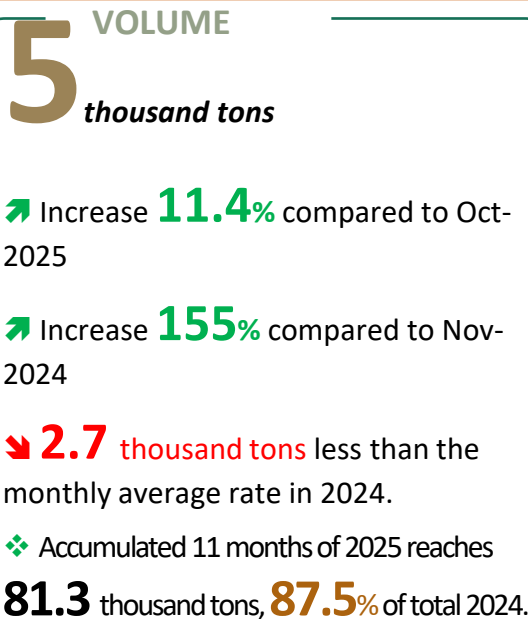
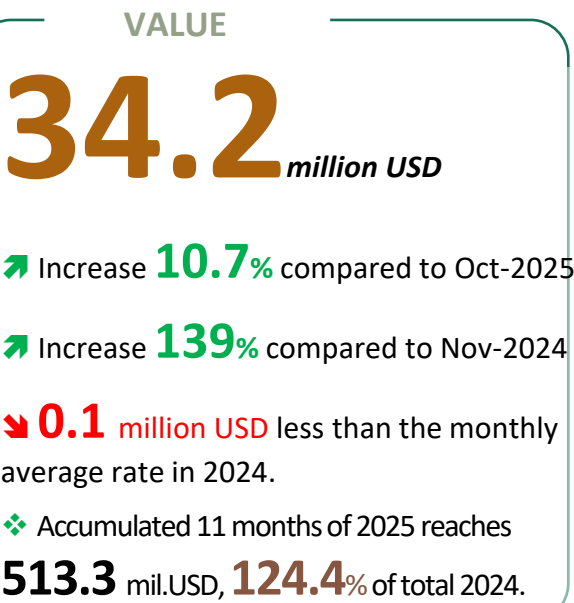


# COFFEE

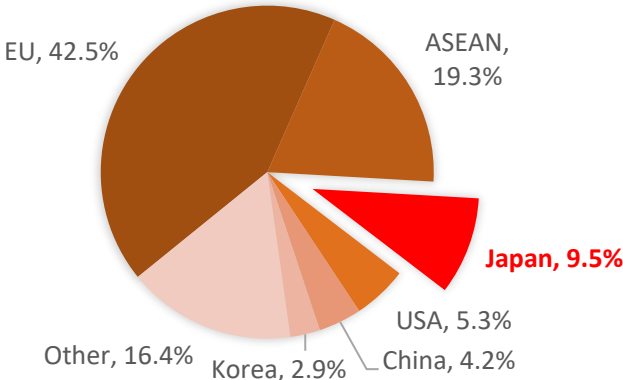
## Export value and volume to Japan, Nov-2025



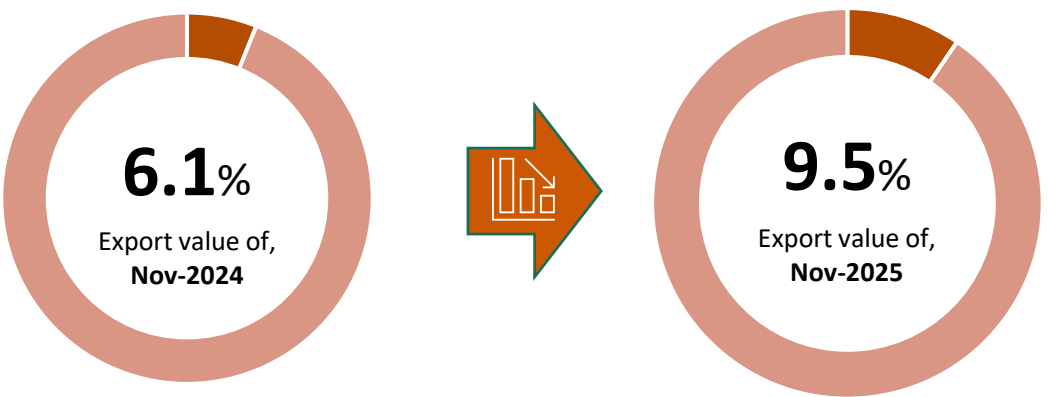
## Export results to Japan, Nov-2025



## Percentage of export value to Japan, Nov-2025



## Changes in percentage of export value to Japan, Nov-2025

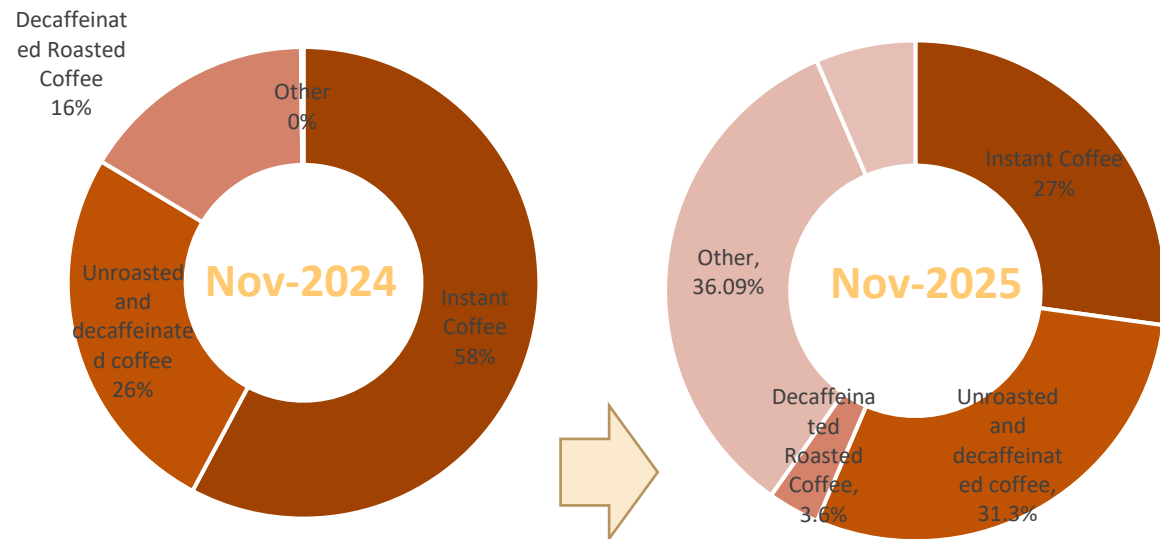


Source: Calculated from data of the General Department of Customs

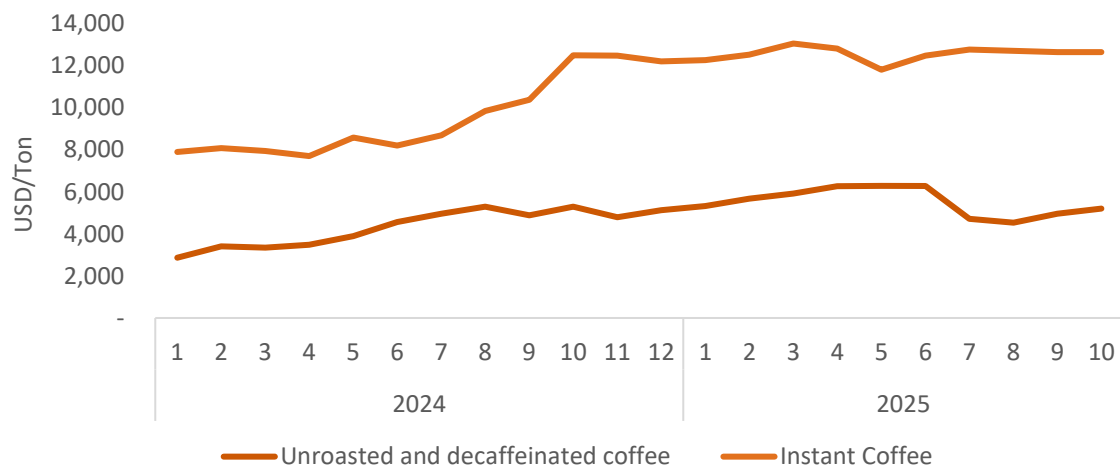


# COFFEE

## Structure of exports by products to Japan, Nov-2025



## Average export coffee price to Japan, Nov-2025



Source: Calculated from data of the General Department of Customs

## Export results to Japan, Nov-2025



### Unroasted and decaffeinated coffee

Value: **14.1** million USD  
Increase **8.9%** compared to Oct-2025  
Increase **333%** compared to Nov-2024



### Instant Coffee

Value: **13.1** million USD  
Decrease **4.1%** so compared to Oct-2025  
Increase **82.4%** compared to Nov-2024



### Decaffeinated Roasted Coffee

Value: **1.6** million USD  
Decrease **13.4%** compared to Oct-2025  
Decrease **19.8%** compared to Nov-2024

### Instant Coffee

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

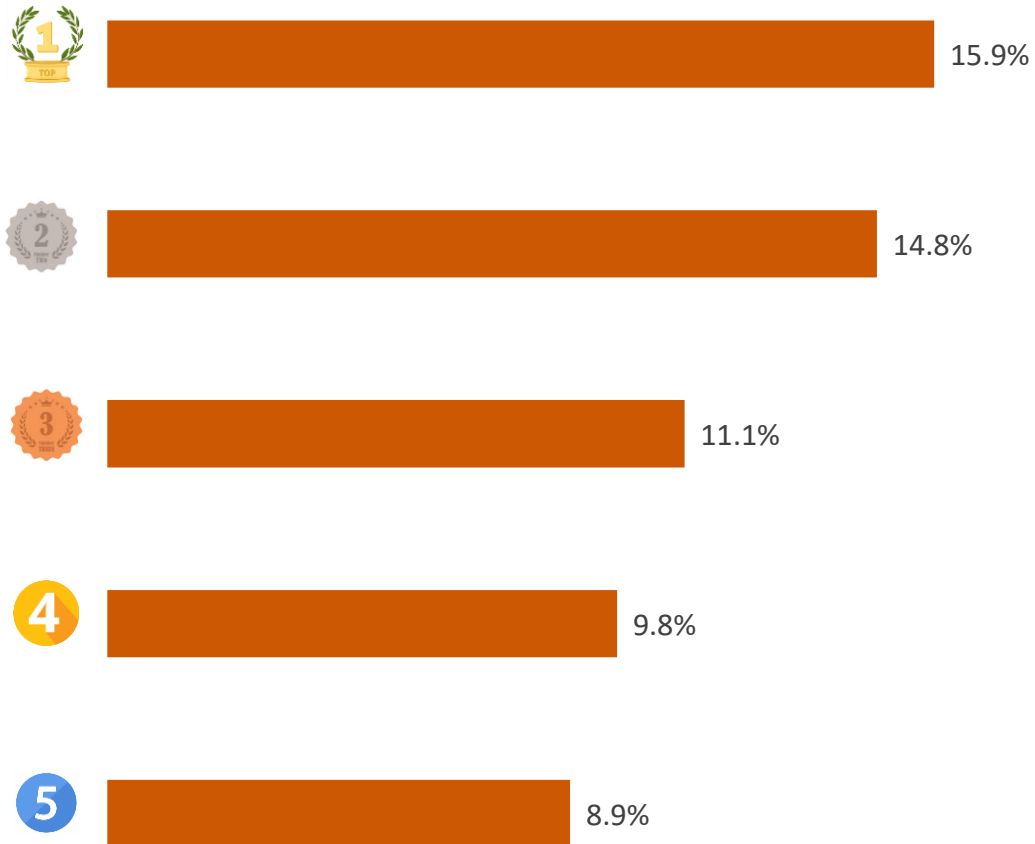
### Unroasted and decaffeinated coffee

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

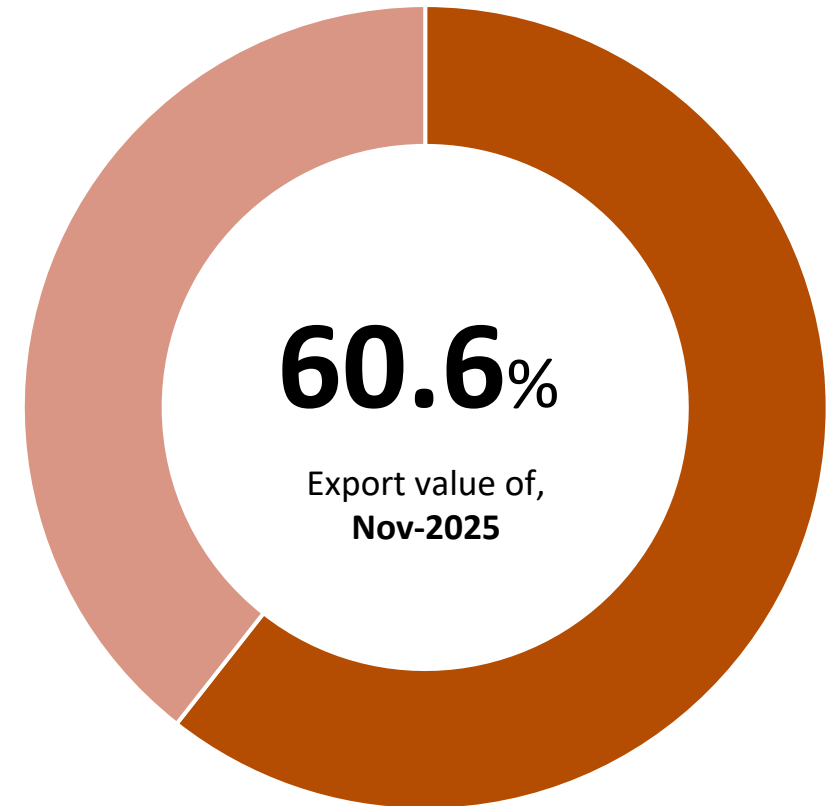


# COFFEE

## TOP 5 export enterprises by value to Japan, Nov-2025



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



According to statistics from the International Trade Center (ITC), in the first 8 months of 2025, Japan's coffee imports will reach 250.7 thousand tons, worth 1.71 billion USD, down 4.4% in volume, but up 50.0% in value over the same period in 2024.

In the first 8 months of 2025, the average price of coffee imports to Japan will reach 6,831 USD/ton, up 57.0% over the same period in 2024. The average price of Japan's coffee imports from major markets increased over the same period in 2024.

In the first 8 months of 2025, Japan imports coffee from 59 countries and territories around the world. In particular, Japan increased coffee imports from Brazil, but imports from Vietnam, Ethiopia... diminish. Specifically: Brazil is the largest supplier of coffee to Japan in the first 8 months of 2025, reaching 94.3 thousand tons, worth 597.7 million USD, up 3.1% in volume and 72.0% in value over the same period in 2024. Brazil's coffee market share in Japan's total imports increased from 34.86% in the first 8 months of 2024 to 37.61% in the first 8 months of 2025.

*Source: Agency of Foreign Trade - Ministry of Industry and Trade*





# FRUITS & VEGETABLES (EXPORT)

Export value to Japan, Nov-2025



Export results to Japan, Nov-2025

VALUE

**20.1**

million USD

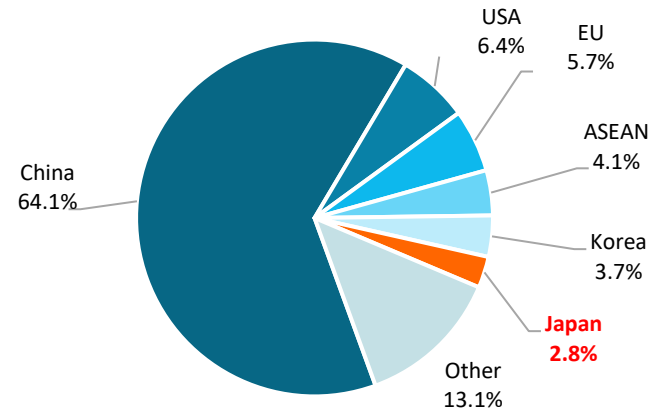
Increase **8.0%** compared to Oct-2025

Increase **9.5%** compared to Nov-2024

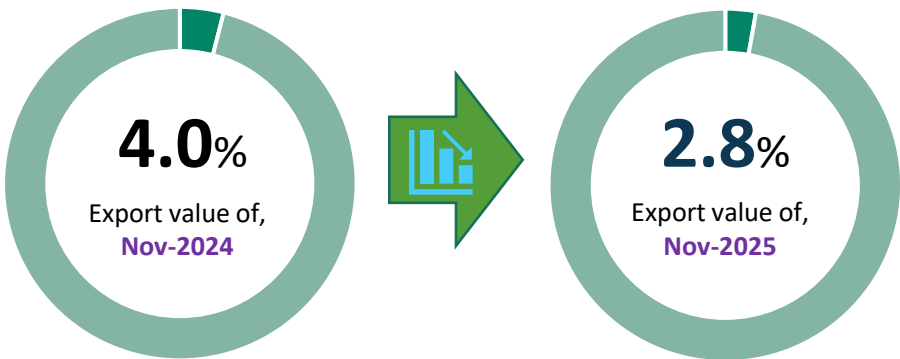
**3.2 million USD** more than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **221.3 million USD**, **108.8%** of total 2024

Percentage of export value to Japan, Nov-2025



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



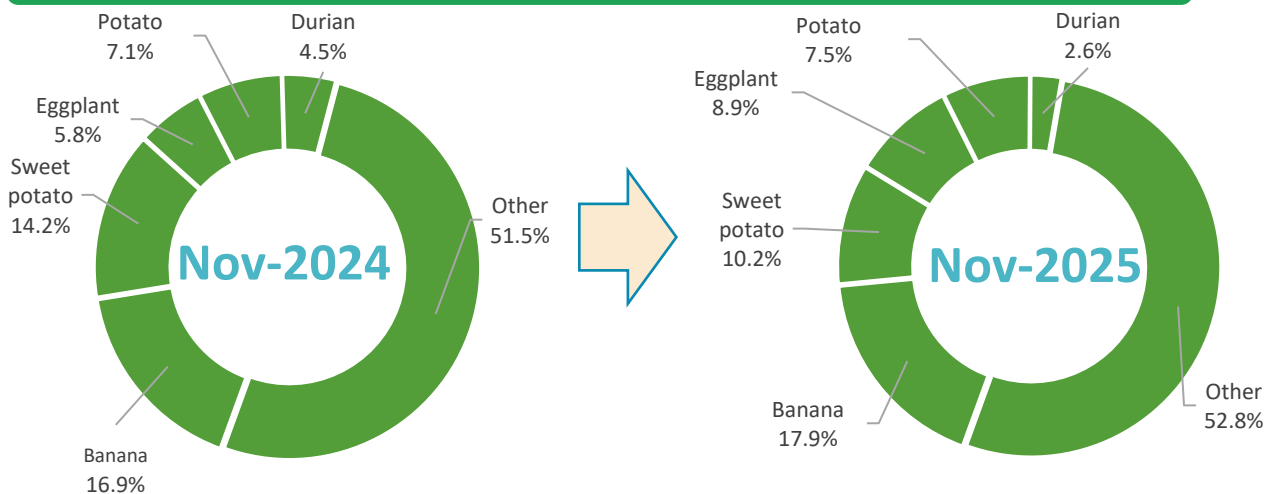
Source: Calculated from data of the General Department of Customs





# FRUITS & VEGETABLES (EXPORT)

## Structure of exports by products to Japan, Nov-2025



### Sweet potato

Value: **2.1** million USD  
Decrease **5.0%** compared to Oct-2025  
Decrease **21.2%** compared to Nov-2024



### Eggplant

Value: **1.8** million USD  
Increase **36.1%** compared to Oct-2025  
Increase **68.0%** compared to Nov-2024

## Export results to Japan, Nov-2025



### Banana

Value: **3.6** million USD  
Decrease **3.6%** compared to Oct-2025  
Increase **16.3%** compared to Nov-2024



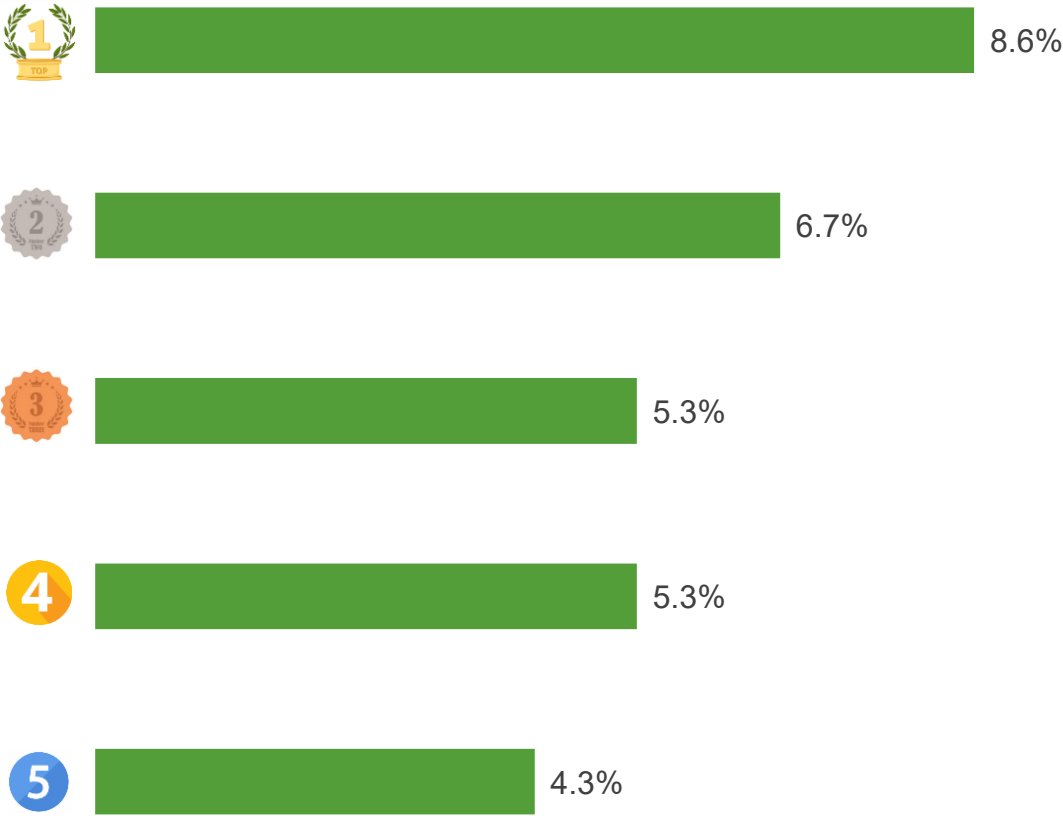
### Mango

Value: **1.5** million USD  
Increase **199.1%** compared to Oct-2025  
Increase **15.5%** compared to Nov-2024



# FRUITS & VEGETABLES (EXPORT)

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



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

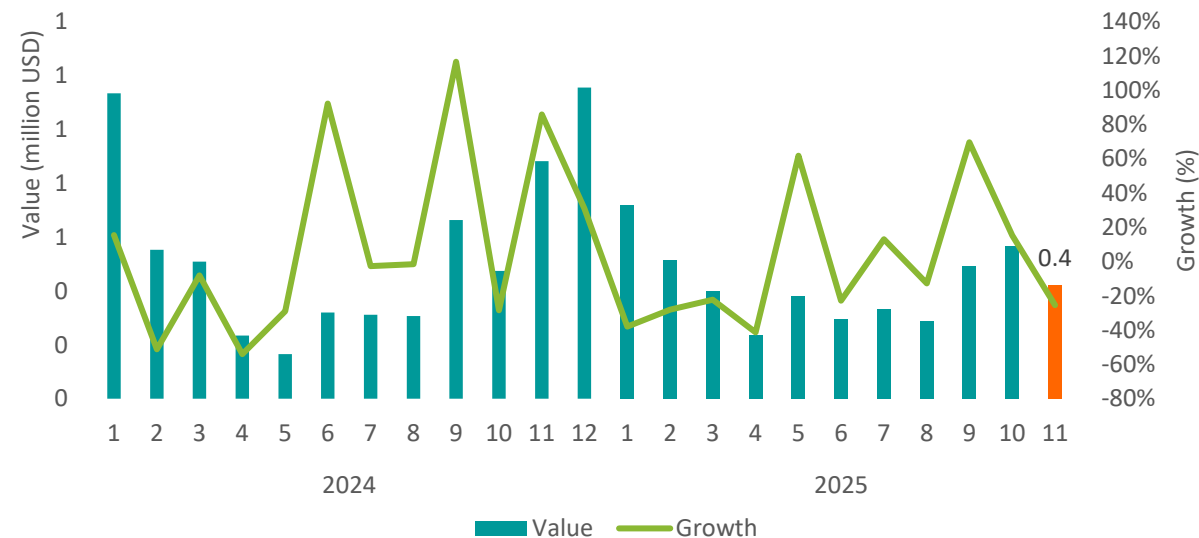


Source: Calculated from data of the General Department of Customs



# FRUITS AND VEGETABLES (IMPORT)

Import value from Japan, Nov-2025



Import results from Japan, Nov-2025



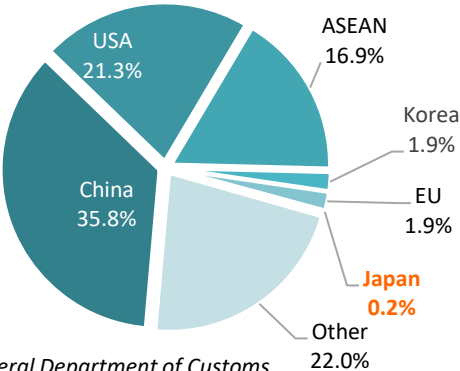
Decrease **25.4%** compared to Oct-2025

Decrease **52.2%** compared to Nov-2024

**137.1 thousand USD** less than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **4.6 million USD**, **69.2%** of total 2024

Percentage of import value from Japan, Nov-2025



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



Source: Calculated from data of the General Department of Customs



### Japan sets a new record for premium persimmon prices

The first auction of the high-end persimmon brand Tenka Fubu – a product line developed by Gifu Prefecture from the Neo Sweet persimmon variety took place at the Toyoyama wholesale market. Two persimmons of the highest quality grade were sold for 1.11 million yen (about \$7,350). The Tenka Fubu brand is only used for Neo Sweet persimmons that meet strict quality standards, with the name being synonymous with the famous "tenka fubu" seal of the warlord Oda Nobunaga at the end of the sixteenth century. Tenka Fubu persimmons are classified into three classes; the highest group has a sweetness of over 25 Brix, far exceeding the level of about 16 Brix of popular persimmon varieties such as fuyu-gaki. The auction shows the steady attraction of Japanese ultra-premium fruits and the role of the quality grading system in shaping market value.

*Source: Freshplaza.com*

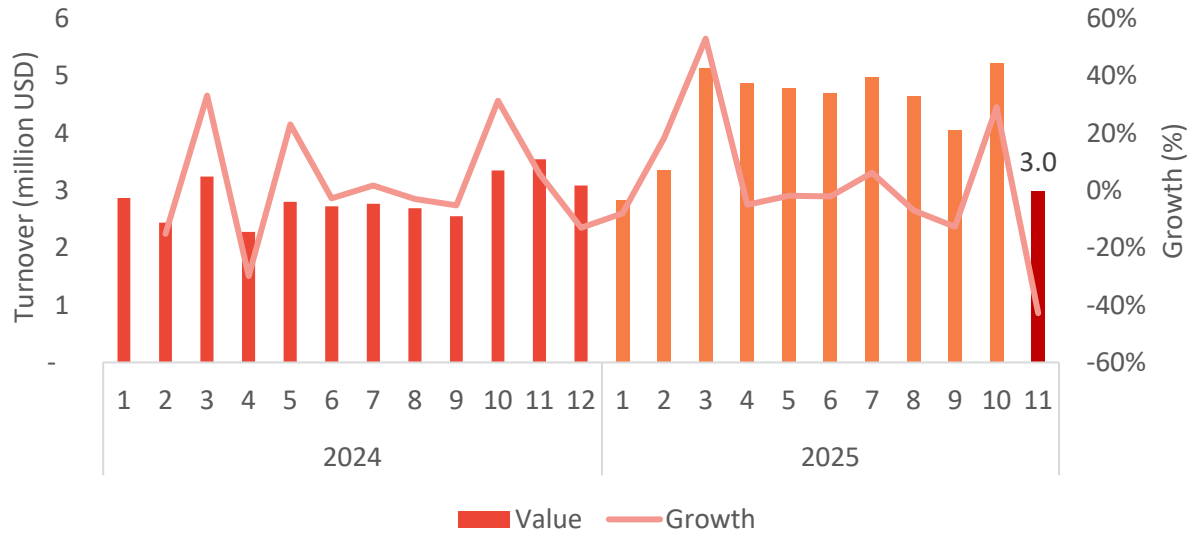






# MEAT AND MEAT PRODUCTS (EXPORT)

## Export value to Japan, Nov-2025



## Export results to Japan, Nov-2025



**2.99**  
million USD

### VALUE

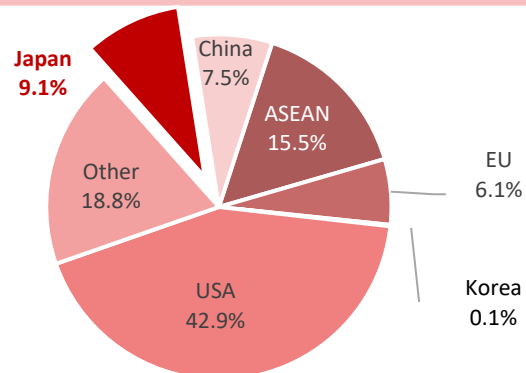
Decrease **42.8%** compared to Oct-2025

Decrease **15.6%** compared to Nov-2024

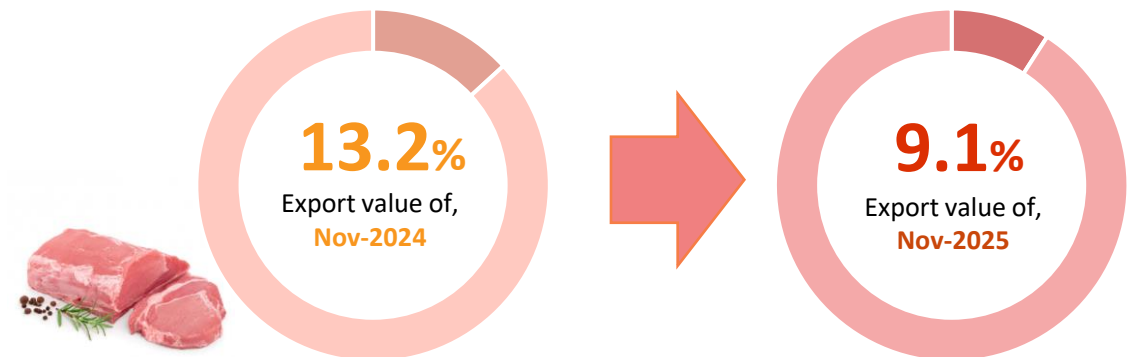
**128.4 million USD** more than the monthly average rate in 2024

◇ Accumulated 11 months of 2025 reaches **47.6 million USD**, **128.5%** of total 2024

## Percentage of export value to Japan, Nov-2025



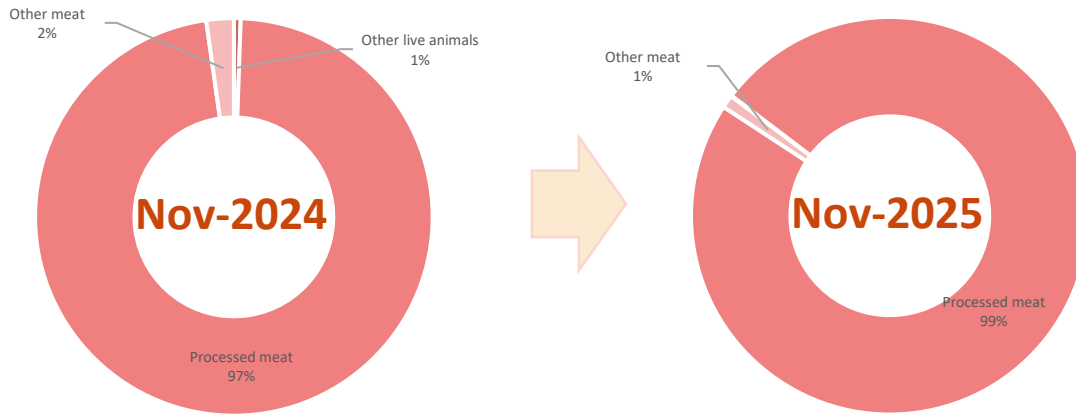
## Changes in percentage of export value to Japan, Nov-2025



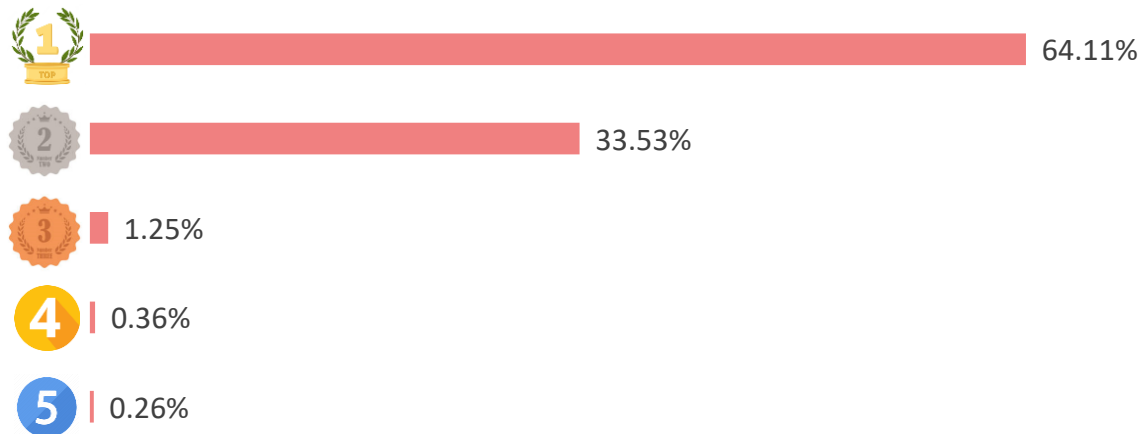


# MEAT AND MEAT PRODUCTS (EXPORT)

## Structure of exports by products to Japan, Nov-2025



## TOP 5 export enterprises by value to Japan, Nov-2025



## Export results to Japan, Nov-2025



### Processed meat

Value: **2.957** million USD

Decrease **32.4%** compared to Oct-2025

Decrease **14.2%** compared to Nov-2024

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





Any comments. please send to:

**CENTER FOR INFORMATION AND SERVICES IN AGRICULTURE AND ENVIRONMENT (AGREINFOS)**

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