

Volume: Feb-2025

A photograph showing several large, brown, woven sacks of rice stacked vertically on a wooden frame. The sacks have green and blue markings. In the background, more sacks are visible, creating a sense of a large storage facility.

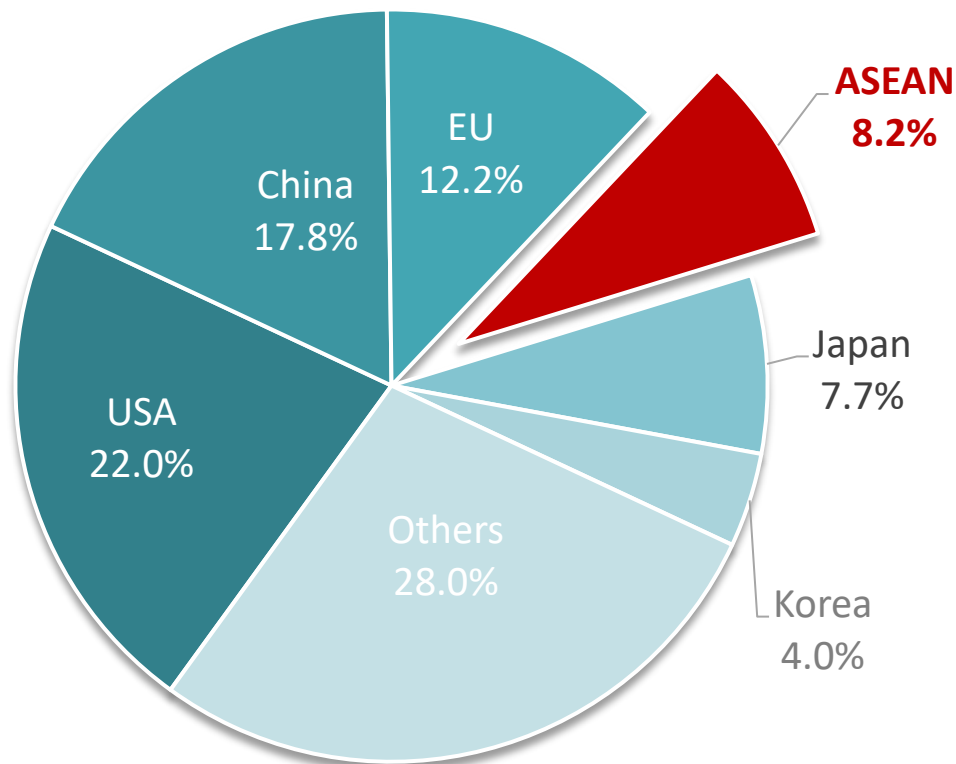
**MONTHLY REPORT ON
AGRI-PRODUCT EXPORT**

**FROM VIETNAM TO
ASEAN MARKET**



THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO ASEAN IN JAN-2024

Proportion of export value of key AFF products to ASEAN in January 2025

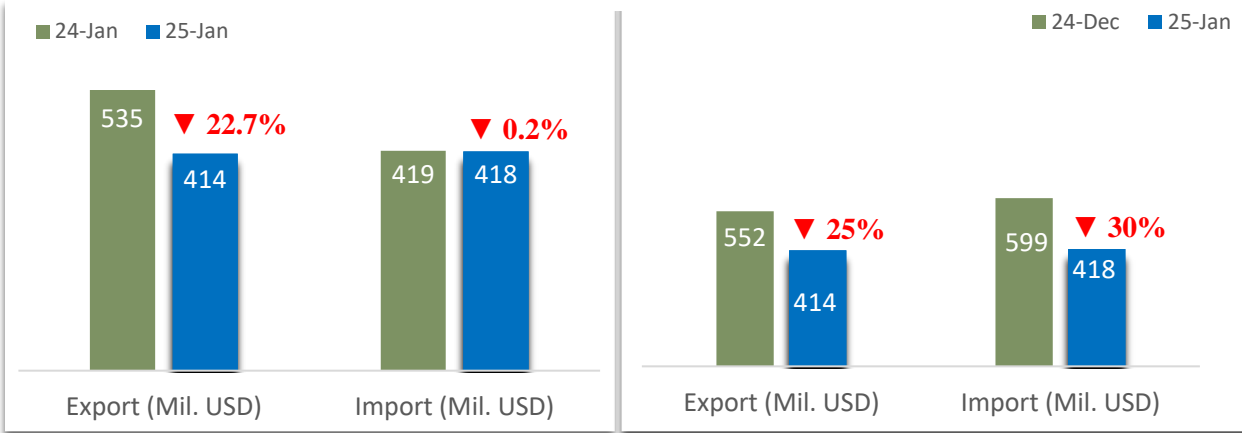


Changes in the proportion of export value of key AFF products to ASEAN in Jan-2025 compared to Dec-2024 and Jan-2024

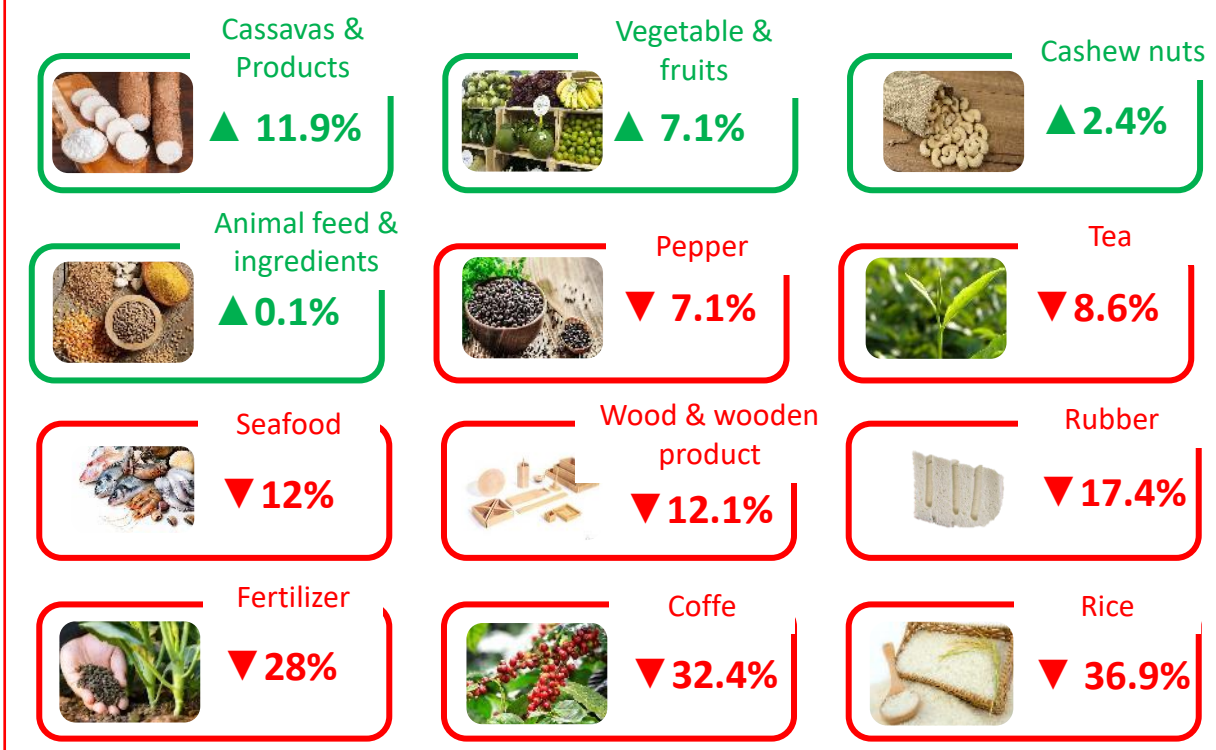
Country	Value (Mil.USD)	Compared to Dec-2024	Compared to Jan-2024
USA	1,093.94	▼ 0.4%	▲ 0.5%
China	887.75	▼ 3.3%	▼ 3.2%
EU	609.58	▲ 2.4%	▲ 2.3%
ASEAN	408.65	▼ 1.3%	▼ 1.7%
Japan	381.24	▲ 0.9%	▲ 0.5%
Korea	201.62	▲ 0.2%	▲ 0.2%
Export value of Viet Nam(Mil.USD)			4,978.74

THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO ASEAN IN JANUARY 2024

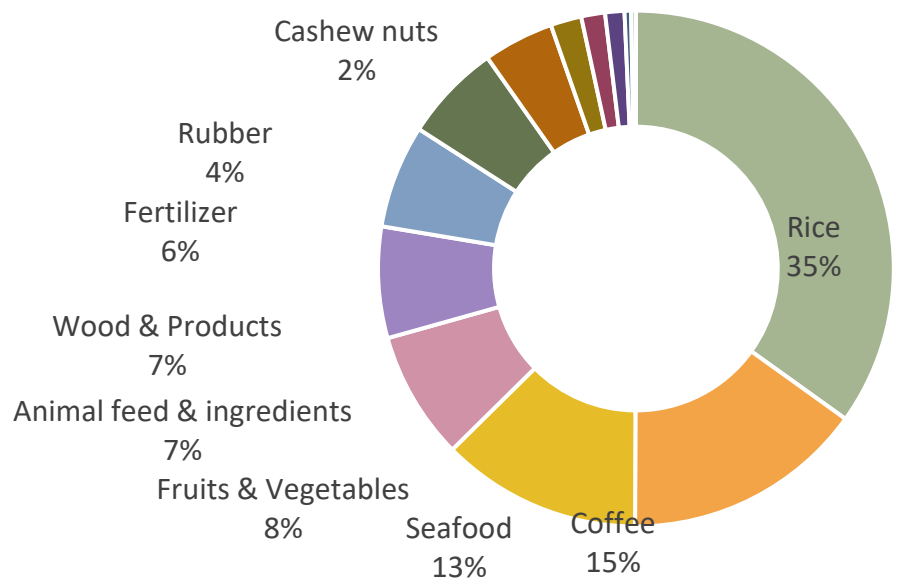
AFF product import-export turnover between Vietnam and ASEAN, January 2025



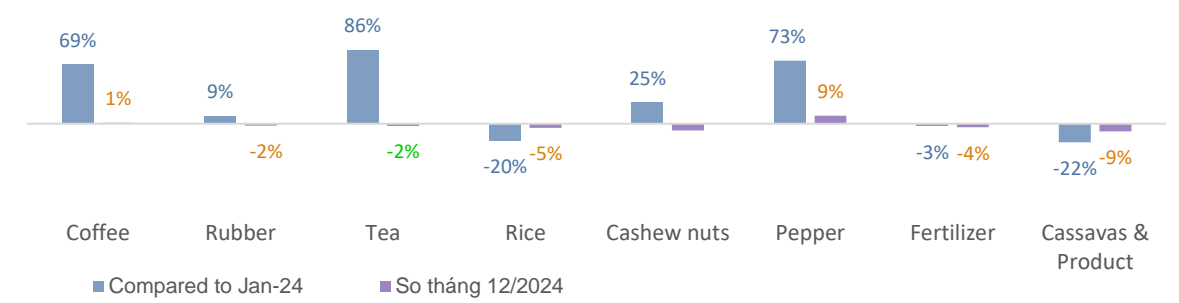
Changes in key AFF product export value to ASEAN in Jan 2025 compared to Dec 2024



Key AFF product export value to ASEAN, January 2024



Changes in average export value of key AFF products to ASEAN in Jan-25 compared to Jan-24 and compared to Dec-24



Source: Calculated from data the Department of Vietnam Customs

Unit: Mil.USD

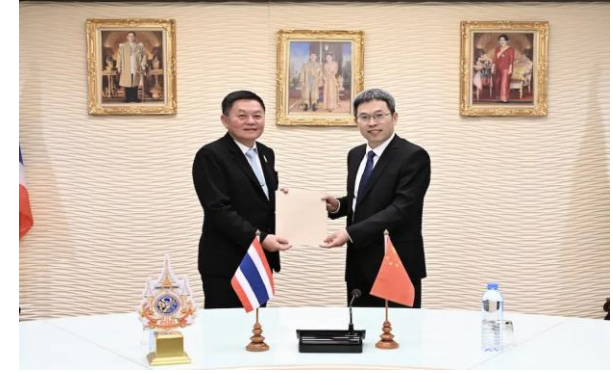
SPOTLIGHT

Thailand and China Enhance Agricultural Products Trade Cooperation



Thailand, China Expand Agricultural Trade and Market Access

Thailand and China strengthened their agricultural trade cooperation following a high-level meeting between Thailand's Minister of Agriculture - Narumon Pinyosinwat and Chinese officials in Beijing. Both parties agreed to expand market access for fruits, seafood, and livestock; enhance trade routes; improve food safety standards; and simplify import procedures.



China is the Thailand's largest export market for agricultural products, of which durian, mangosteen, and mango account for a significant market share. The two countries are negotiating for trading salacca (a type of palm fruit), dates, as well as live cattle and buffalo-derived products. Additionally, Thailand has secured an agreement to export barramundi to China, with an expected annual volume over 50,000 tons, valued at 4.9 billion baht (approximately 144.8 million USD).

Source: thailand.prd.go.th



ASEAN will adopt the ASEAN Economic Community (AEC) Strategic Plan in 2026-2030 period

ASEAN will adopt the ASEAN Economic Community (AEC) Strategic Plan in 2026-2030 period

The ASEAN Economic Community (AEC) Strategic Plan 2026-2030 will be finalized by March 2025 and is expected to be adopted at the 46th ASEAN Summit in Malaysia in May 2025. This Plan is based on extensive consultations with relevant stakeholders, aiming to establish an action-oriented, sustainable, dynamic, adaptive and inclusive AEC. These initiatives play a crucial foundation for fostering a more competitive economic community as well as facilitating trade and business in the region.

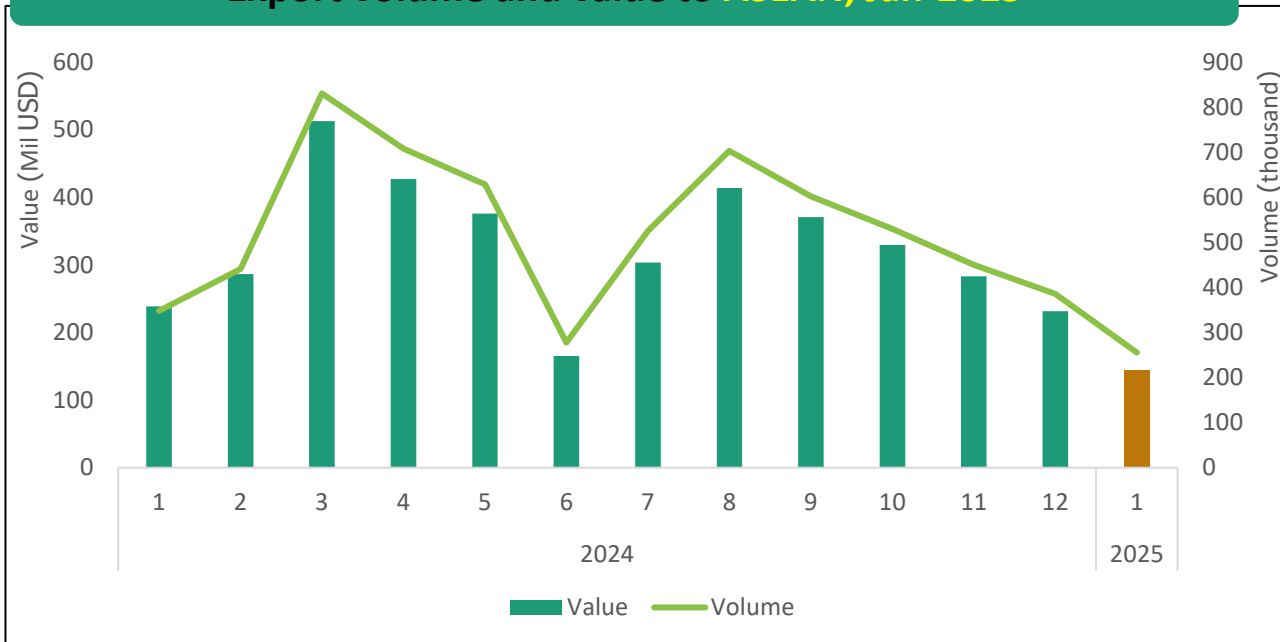
Source: aseanvietnam.vn





RICE

Export volume and value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025

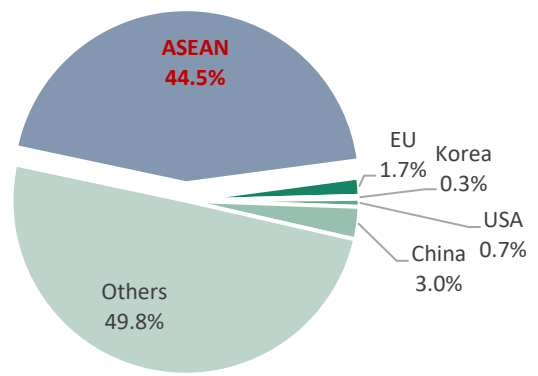
VALUE
144.8 Mil.USD

- ↘ Decrease **37.5%** compared to Dec-24
- ↘ Decrease **39.4%** compared to Jan-24
- ↘ **183.5 Mil.USD** less than the monthly average rate in 2024.
- ◇ Accumulated 1 month of 2025 reaches **144.8** Mil.USD, and the rate is **3.7%** of the total in 2024.

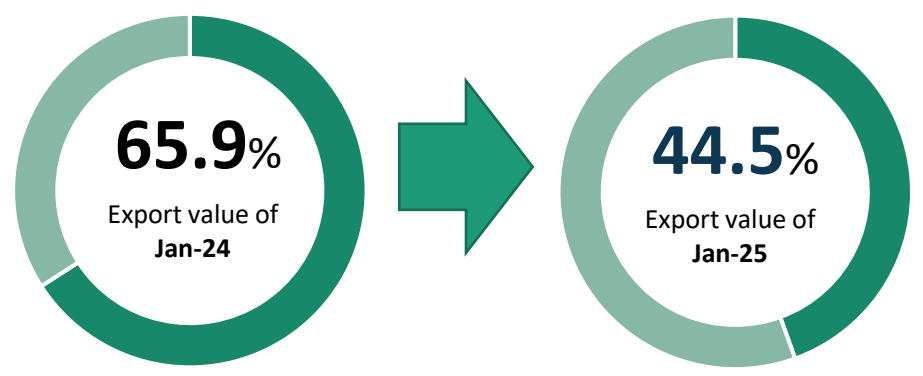
VOLUME
255.6 nghìn tấn

- ↘ Decrease **33.7%** compared to Dec-24
- ↘ Decrease **26.5%** compared to Jan-24
- ↘ **280.4 thousand tons** less than the monthly average rate in 2024.
- ◇ Accumulated 1 month of 2025 reaches **255.6** thousand tons, and the rate is **4.0%** of the total in 2024.

Percentage of export value to ASEAN, Jan-2025

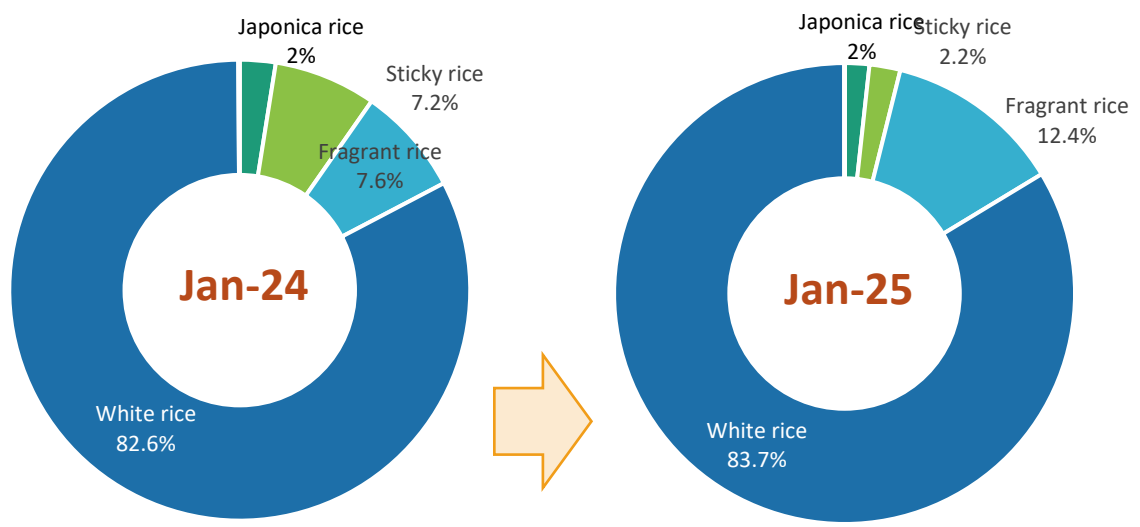


Changes in the percentage of export value to ASEAN, Jan-2025



Source: Calculated from data the Department of Vietnam Customs

Structure of exports by products to ASEAN, Jan-2024



Export results to ASEAN, Jan-2024



White rice

Value: **121.2** Mil.USD
 Decrease **39%** compared to Dec-24
 Decrease **39%** compared to Jan-24

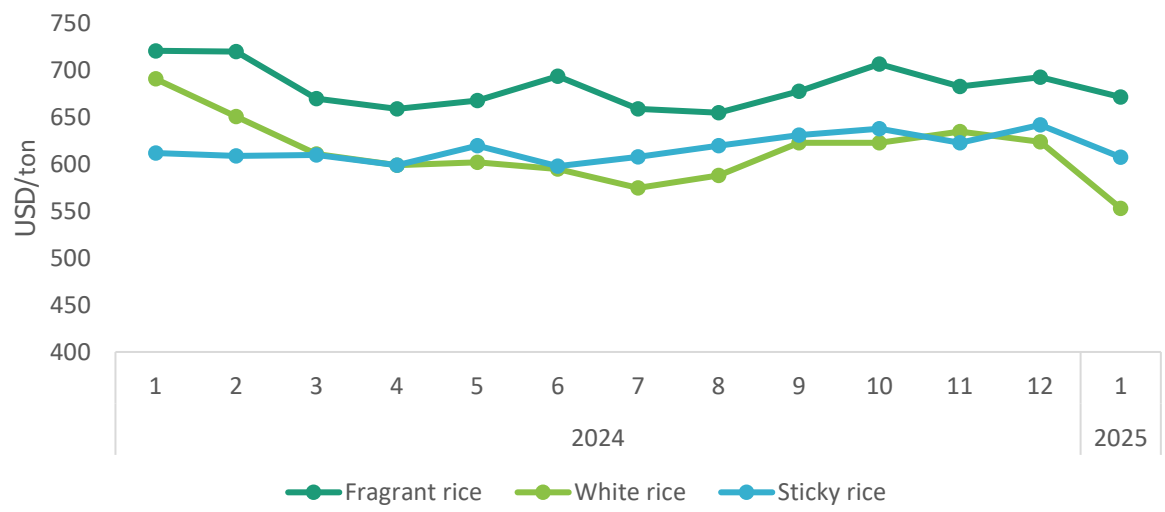
Fragrant rice

Value: **18.0** Mil.USD
 Decrease **22%** compared to Dec-24
 Decrease **1%** compared to Jan-24

Sticky rice

Value: **3.1** Mil.USD
 Decrease **35%** compared to Dec-24
 Decrease **82%** compared to Jan-24

Average export price to ASEAN, Jan-2024



Sticky rice
 The average export price in Jan-24 is **607** USD/ton; **Decrease 5%** compared to the previous month; and **Decrease 1%** compared to the same month in 2024.

Fragrant rice
 The average export price in Jan-24 is **672** USD/ton; **Decrease 3%** compared to the previous month; and **Decrease 7%** compared to the same month in 2024.

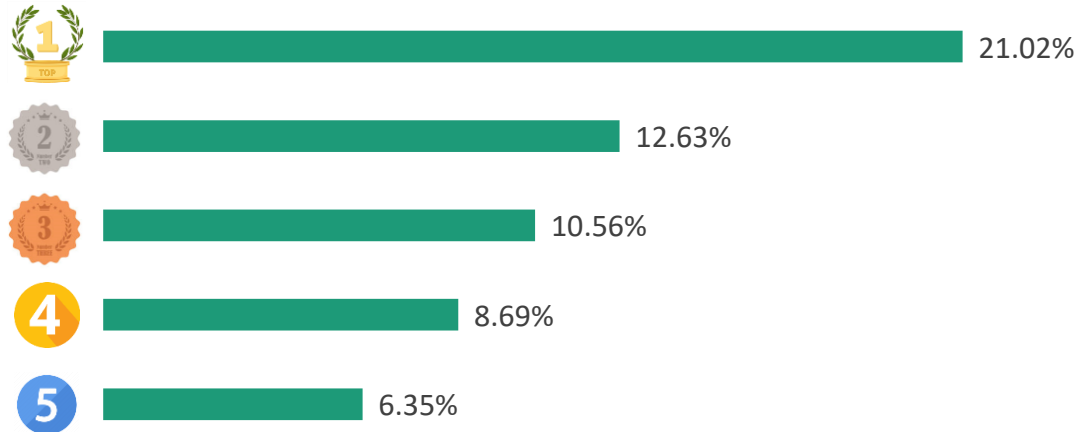
White rice
 The average export price in Jan-24 is **553** USD/ton; **Decrease 11%** compared to the previous month; và **Decrease 20%** compared to the same month in 2024.

Source: Calculated from data the Department of Vietnam Customs

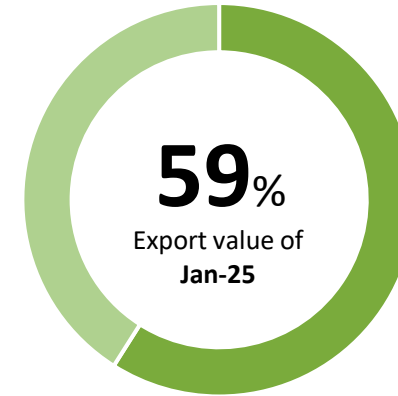


RICE

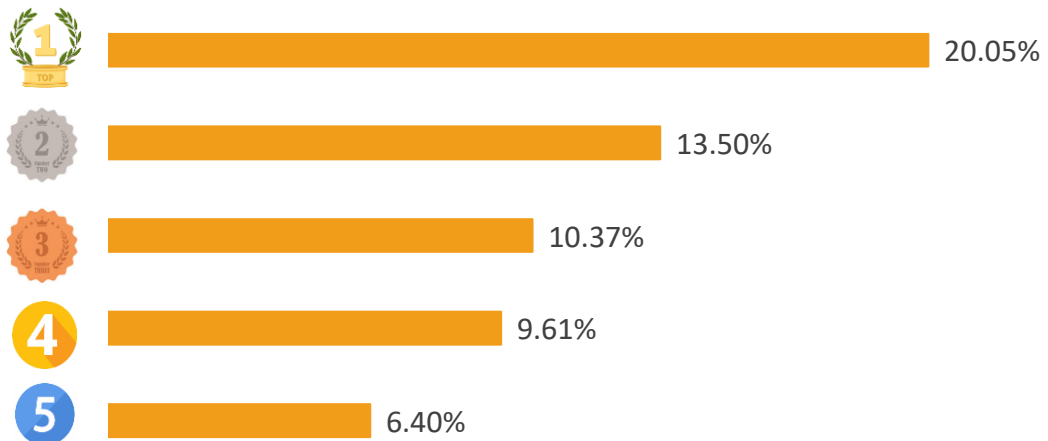
Top 5 export enterprises by value to ASEAN, Jan-2025



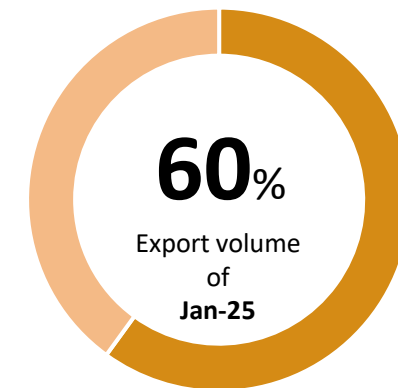
Value ratio of Top 5 export enterprise to ASEAN, Jan-2025



Top 5 export enterprises by volume to ASEAN, Jan-2025



Volume ratio of Top 5 export enterprise to ASEAN, Jan-2025





RICE

SPOTLIGHT

01

In the first two months of 2025, Thailand's rice exports is about 1.1 million tons, a 32% decline compared to the same period in 2024, of which white rice exports significantly dropped. The Thai Rice Exporters Association forecasts that Thailand's rice exports will reach 7.5 million tons in 2025, decreasing 24.2% compared to 9.94 million tons last year. The primary reasons is the India's increased white rice exports after a two-year disruption and a global rice production increases 10 million tons compared to 2024.

The Thai Rice Exporters Association stated that if the U.S. imposes a 10% tariff on its imports, Thailand's rice prices will increase by \$100 per ton, directly affecting its competitiveness.

The association also emphasized the government's role in promoting safe farming practices to reduce production costs, particularly focusing on fertilizer, pesticides, fuel expenses and develop new rice varieties to improve productivity. Thailand's rice yield is about 2.5 tons/ha, the lowest yield in the world, compared to 5 tons/ha of Vietnam and 6.25 tons/ha in the U.S. Thailand's rice export volume will decline significantly if Thailand does not improve its rice sector in the next 2-3 years.

Source: Baotintuc.vn

02

The Philippine Department of Agriculture begun to distribute 150,000 tons of rice from the National Food Authority's reserves to local governments to stabilize rice prices following the declaration of food security emergency. The distribution plan will be in 6 months, with 25,000 tons of rice per month, subject to adjustments if necessary. This is the initial step in the Philippine government's efforts to support both consumers and domestic rice farmers.

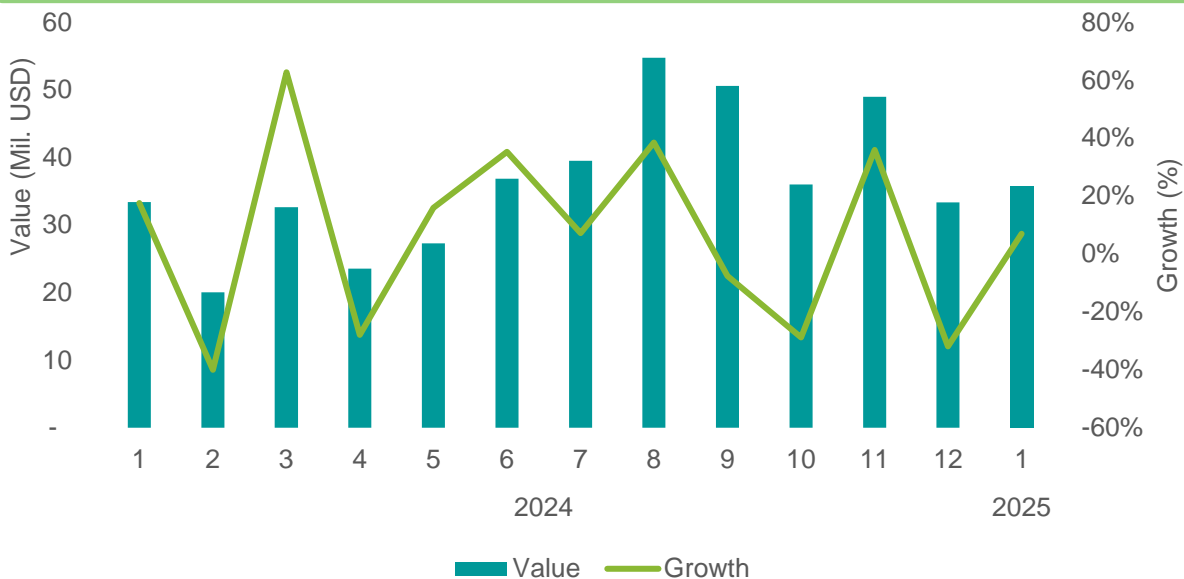
Source: Msn.com





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Jan-25



Export results to the ASEAN, Jan-25

VALUE
35.7
Mil.USD

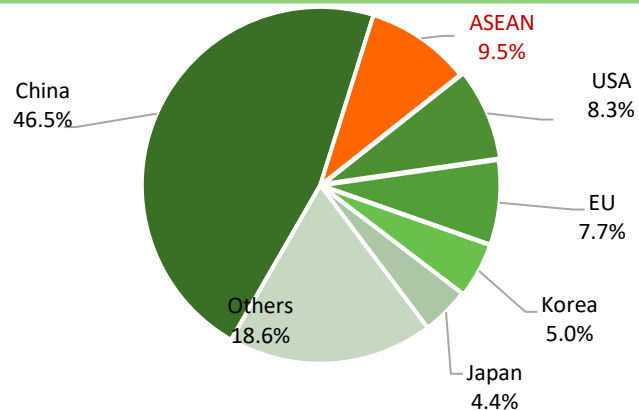
Increase **7.0%** compared to Dec-24

Increase **6.9%** compared to Jan-24

Thấp hơn **0.7 Mil.USD** more than the monthly average rate in 2024.

Accumulated 1 month of 2025 reaches **35.7 Mil.USD**, and the rate is **8.2%** of the total in 2024.

Percentage of export value to the ASEAN, Jan-25



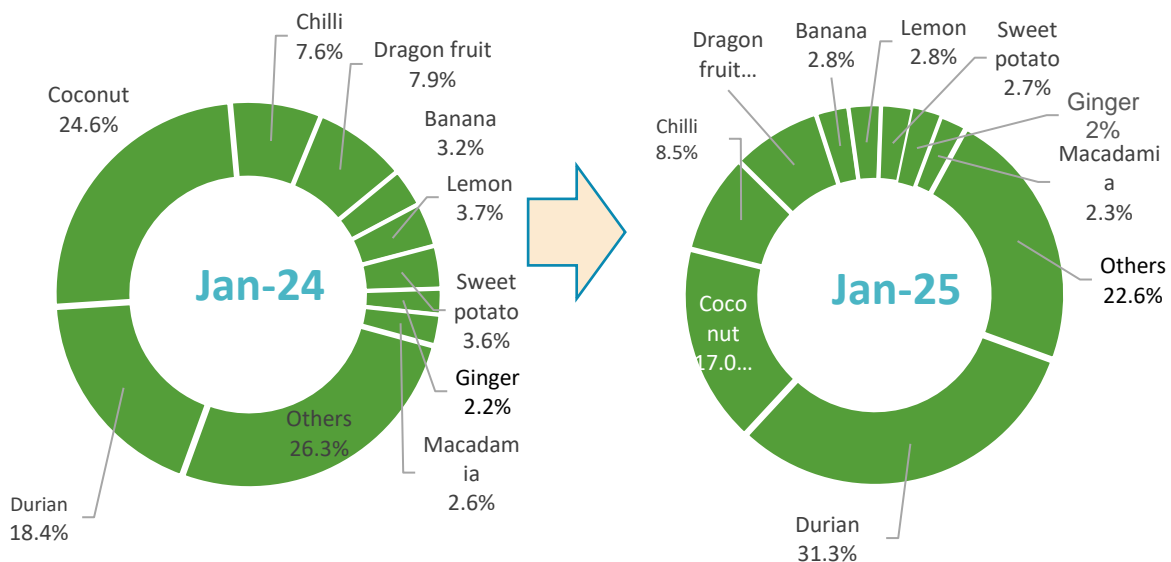
Changes in percentage of export value to the ASEAN, Jan-25





FRUITS AND VEGETABLES (EXPORT)

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



Export results to the ASEAN, Jan-25



Durian

Value: **11.2** Mil.USD

Decrease **8.0%** compared to Dec-24

Increase **81.9%** compared to Jan-24



Coconut

Value: **6.1** Mil.USD

Increase **44.9%** so với T12/2024

Decrease **26.0%** compared to Jan-24



Chilli

Value: **3.0** Mil.USD

Increase **9.3%** compared to Dec-24

Increase **19.0%** compared to Jan-24



Dragon fruit

Value: **2.7** Mil.USD

Increase **38.8%** compared to Dec-24

Increase **3.6%** so compared to Jan-24



Ginger

Value: **0.99** Mil.USD

Decrease **13.5%** compared to Dec-24

Decrease **7.1%** compared to Jan-24



Lemon

Value: **0.98** Mil.USD

Increase **1.7%** compared to Dec-24

Decrease **20.1%** compared to Jan-24



Sweet potato

Value: **0.97** Mil.USD

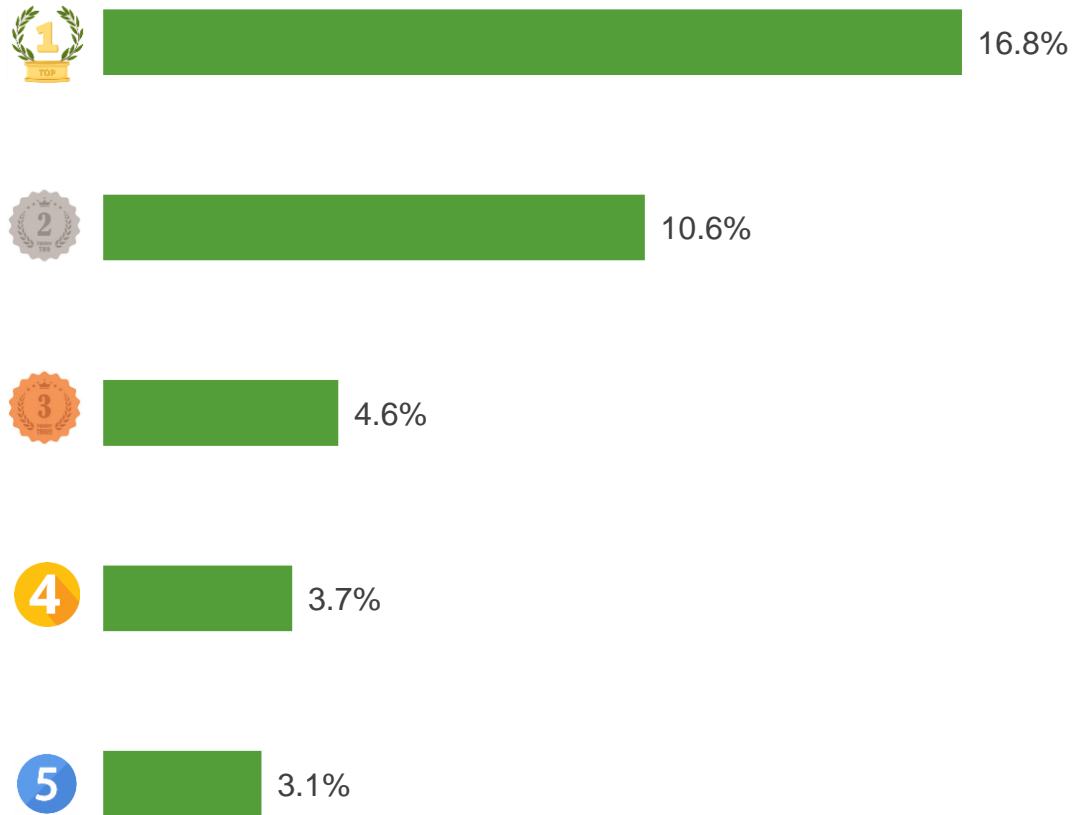
Decrease **3.9%** compared to Dec-24

Decrease **18.9%** compared to Jan-24

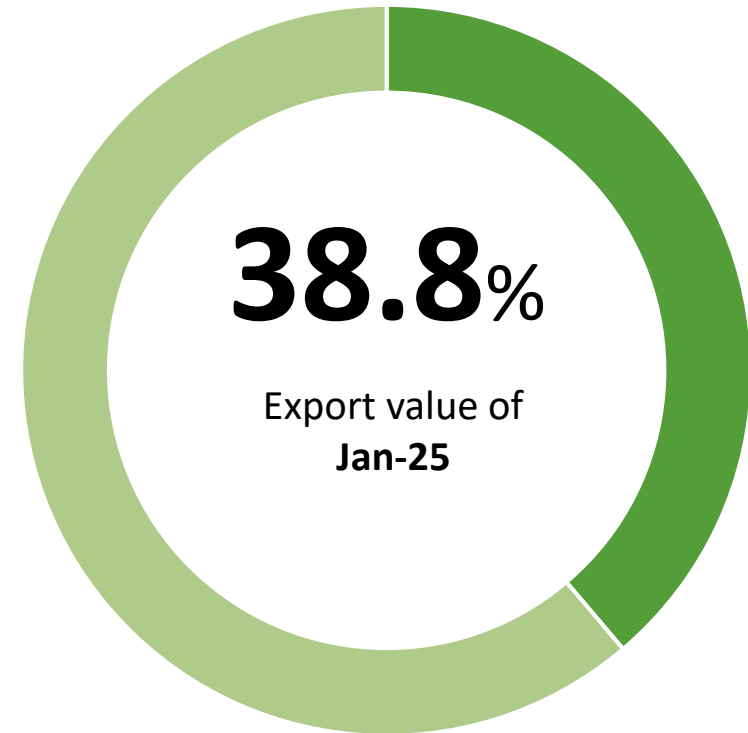


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Jan-2025



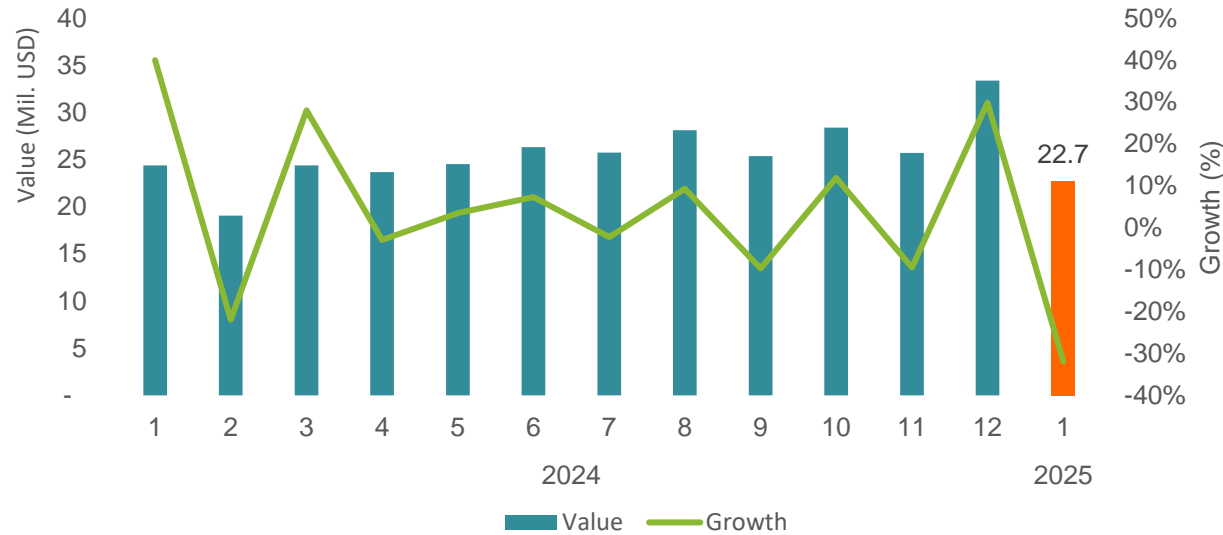
Value ratio of TOP 5 export enterprises to the ASEAN, Jan-2025





FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Jan-2025



Import results to the ASEAN, Jan-2025

VALUE



22.7

Mil.USD

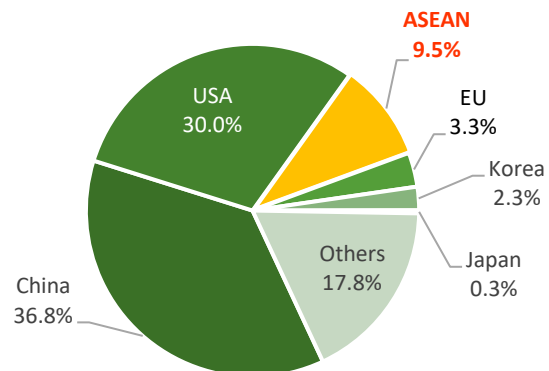
Decrease **31.9%** compared to Dec-24

Decrease **6.8%** compared to Jan-24

3.0 Mil.USD Less than the monthly average rate in 2024.

Accumulated 1 month of 2025 reaches **22.7 Mil.USD**, and the rate is **7.4%** of the total in 2024.

Percentage of import value to the ASEAN, Jan-2025



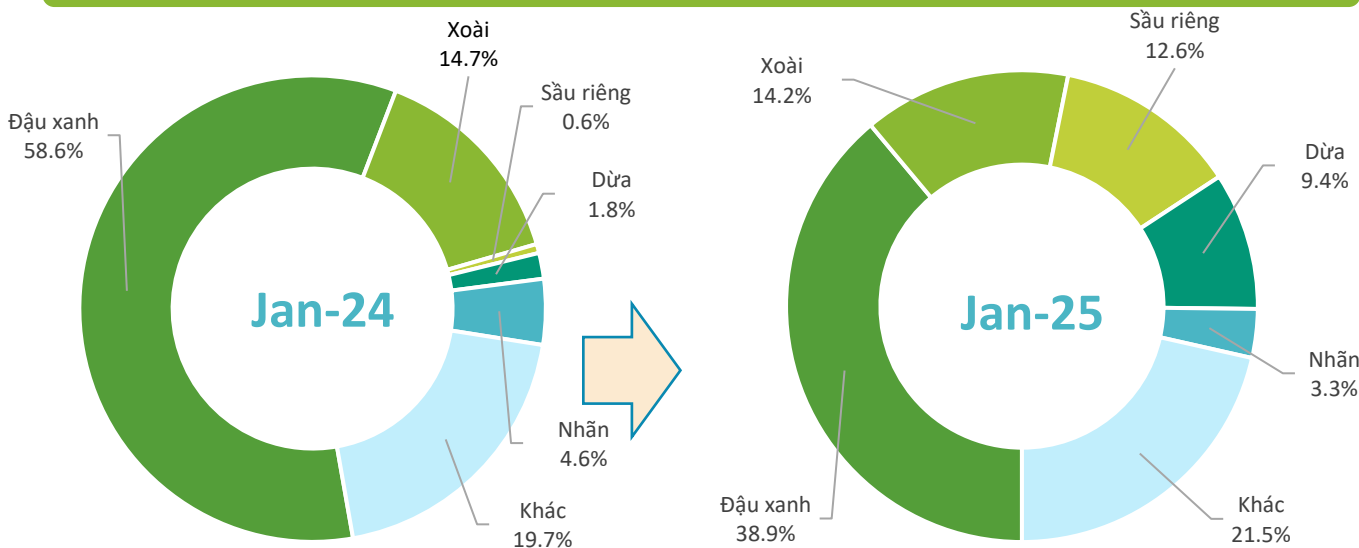
Changes in percentage of import value to the ASEAN, Jan-2025





FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Jan-2025



Import results from the ASEAN, Jan-2025



Mung bean

Value: **8.8** Mil.USD

Decrease **44.1%** compared to Dec-24

Decrease **38.1%** so % compared to Jan-24



Mango

Value: **3.2** Mil.USD

Increase **99.4%** compared to Dec-24

Decrease **9.8%** compared to Jan-24



Durian

Value: **2.9** Mil.USD

Decrease **31.1%** compared to Dec-24

18.8 times compared to Jan-24



Coconut

Value: **2.1** Mil.USD

Increase **29.5%** compared to Dec-24

Increase **392.0%** compared to Jan-24



Longan

Value: **0.76** Mil.USD

Decrease **55.8%** compared to Dec-24

Decrease **31.6%** compared to Jan-24



Khammouane Province of Laos to Export 100 Tons of Mangoes to China in 2025

Khammouane Province of Laos plans to export 100 tons of mangoes to China this year. The province's mango production is about 500 tons, primarily cultivated by Chinese investors in Xaybouathong District. Previously, the province successfully exported over 100 tons of passion fruit to China.

Source: Vietnambiz.vn

Chinese Customs will Inspect Indonesian Durian Orchards and Packing Facilities in March

The Indonesian Quarantine Agency announced that Indonesia is ready to export durians to China. The draft protocol for Indonesia's durian exports to China is completed and prepared for signing. An inspection team from China's General Administration of Customs is scheduled to visit durian orchards and packing facilities in Central Sulawesi Province from March 9 to March 14, 2025.

In 2023, Indonesia's durian production was 1.83 million tons. However, exporting fresh durians remains challenging due to far distance from Indonesia to China.

Source: Nongnghiep.vn



The Philippines officially exports frozen durian to China

Maylong Enterprises, based in Davao City, exported 1,050 boxes of frozen durian and 300 boxes of pureed durian, valued at 8.2 million pesos (approximately 142,000 USD) to Nansha District, Guangzhou, China. Maylong is the first Philippine company that is approved by China to export frozen durian flesh and pureed durian.

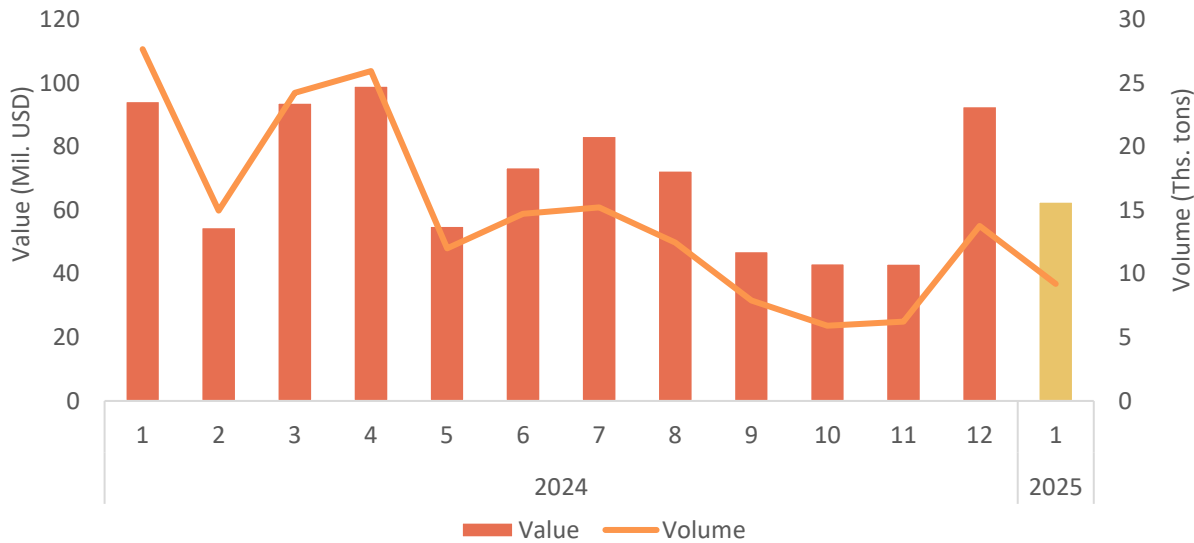
Source: Vietnambiz.vn





COFFEE

Export volume and value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025

VALUE

62.7 Mil. USD

⬇️ Decrease **32.4%** compared to Dec-24

⬇️ Decrease **33.5%** compared to Jan-24

⬇️ **8.4** Mil.USD less than the monthly average rate in 2024..

🔼 Accumulated 1 month of 2025 reaches **62.7** Mil. USD., the rate is **7.4%** of the total in 2024.

VOLUME

9.2 thousand tons

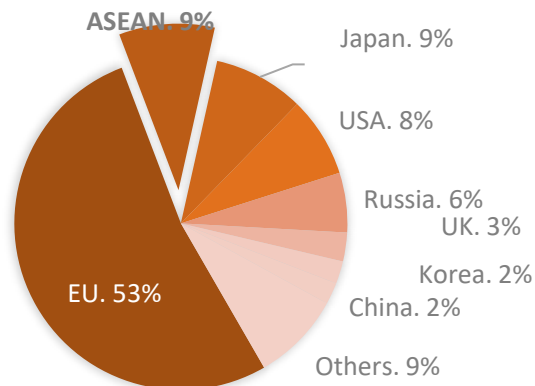
⬇️ Decrease **33.1%** compared to Dec-24

⬇️ Decrease **66.7%** compared to Jan-24

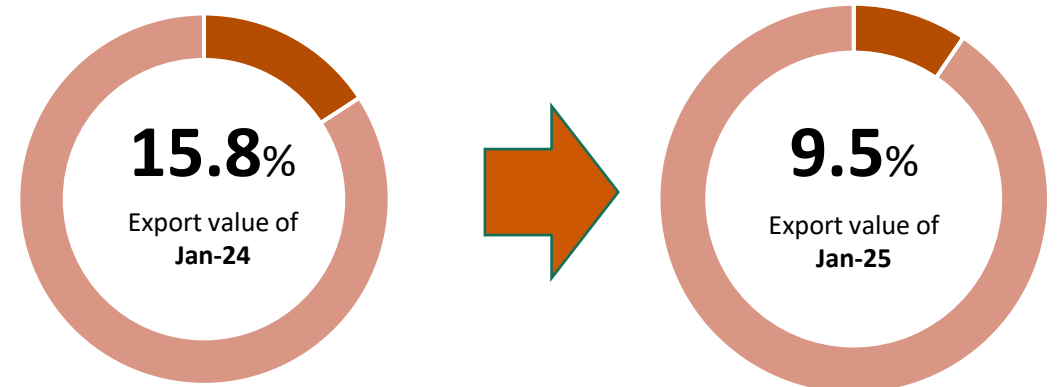
⬇️ **5.9** thousand tons less than the monthly average rate in 2024..

Accumulated 1 month of 2025 reaches **9.2** thousand tons, and the rate is **5.1%** of the total in 2024.

Percentage of export value to ASEAN, Jan-2025



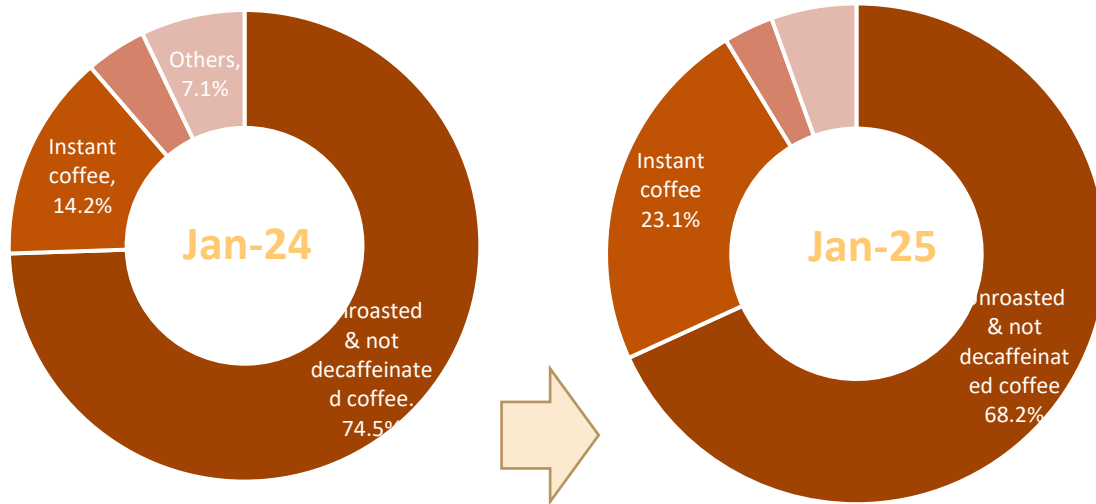
Changes in percentage of export value to ASEAN, Jan-2025





COFFEE

Structure of exports by products to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



Unroasted & not decaffeinated coffee

Value: **27.7** Mil.USD

Decrease **188%** compared to Dec-24

Decrease **28.5%** compared to Jan-24



Instant coffee

Value: **28.8** Mil.USD

Decrease **28.7%** so compared to Dec-24

Increase **49.5%** compared to Jan-24



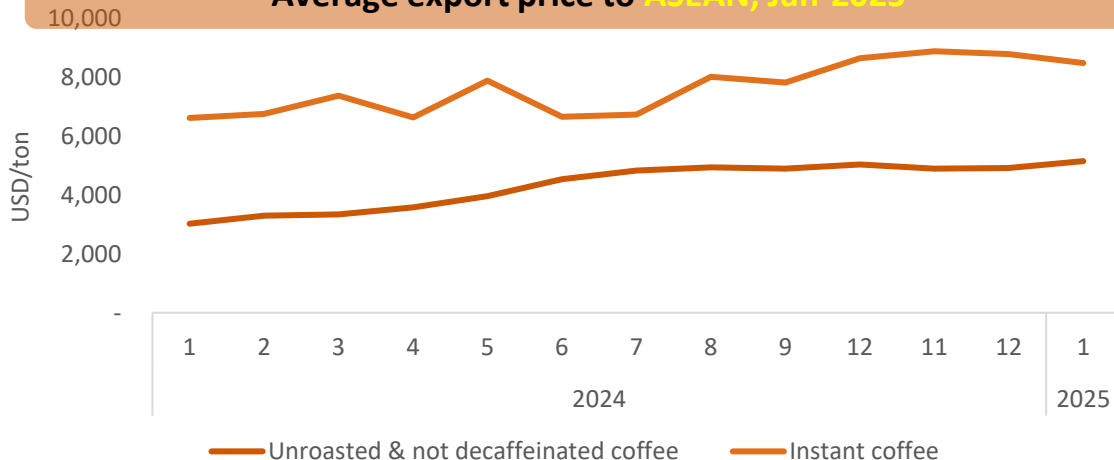
Others

Value: **5.4** Mil.USD

Decrease **34.6%** compared to Dec-24

Decrease **42.6%** compared to Jan-24

Average export price to ASEAN, Jan-2025



Instant coffee

The average export price in Jan-24 is **8.480** USD/ton. Decrease **3.4%** compared to the previous month, and Increase **28.2%** compared to the same month in 2024.

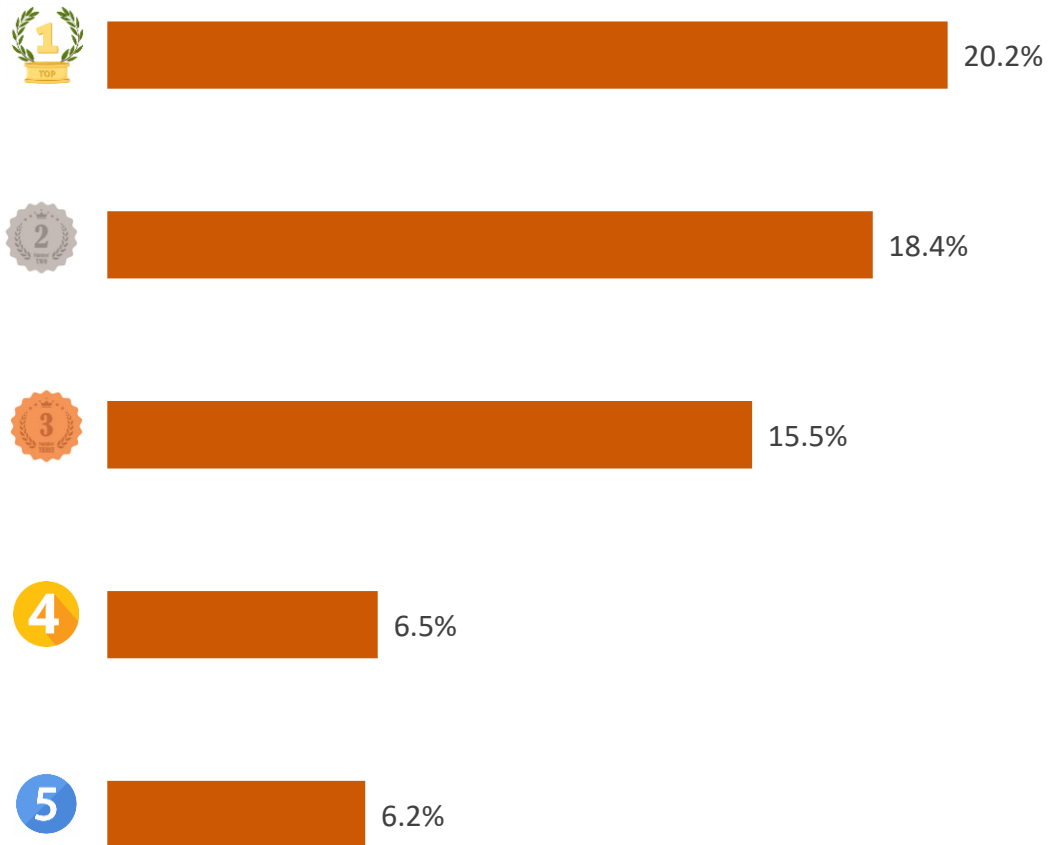
Unroasted & not decaffeinated coffee

The average export price in Jan-24 is **4.056** USD/ton; Increase **4.7%** compared to the previous month, and Increase **70.3%** compared to the same month in 2024.

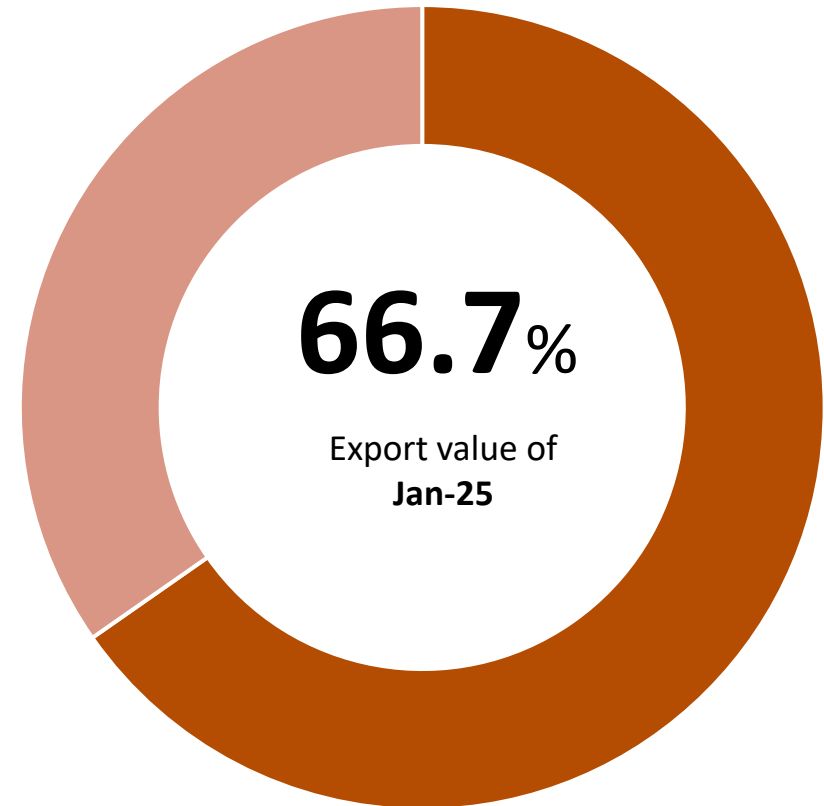


COFFEE

TOP 5 export enterprises by value to ASEAN, Jan-2024



Value ratio of TOP 5 export enterprises to ASEAN, Jan-2024





The ASEAN coffee market comprises two main segments, including home consumption (revenue from retail channels such as supermarkets and convenience stores) and out-of-home consumption (revenue from restaurants, coffee shops, and bars).

In 2025, revenue from home coffee consumption will reach 8.79 billion USD, while the out-of-home segment is estimated to 25.77 billion USD.

The total ASEAN coffee market size is forecasted to 34.57 billion USD by 2025. The compound annual growth rate (CAGR) for home coffee consumption revenue is expected to be 3.83%/year in 2025 – 2029 period, indicating significant growth in the retail coffee market.

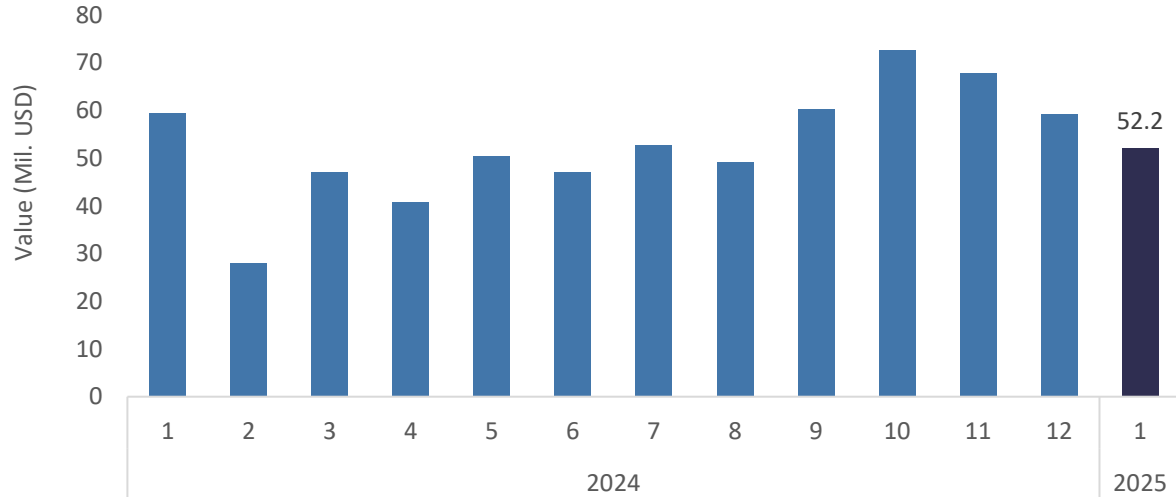
Source: Statista





FISHERIES

Export value to ASEAN, Jan-2025



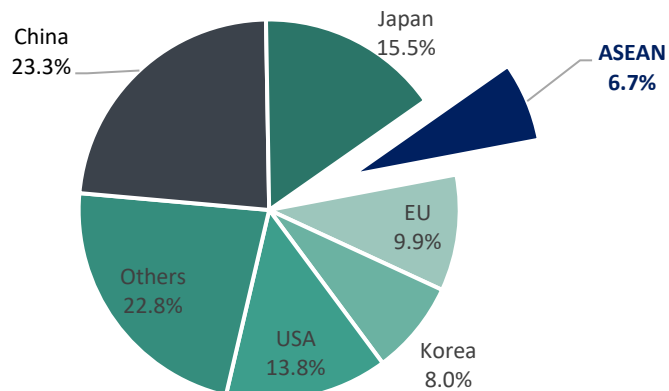
Export results to ASEAN, Jan-2025

VALUE

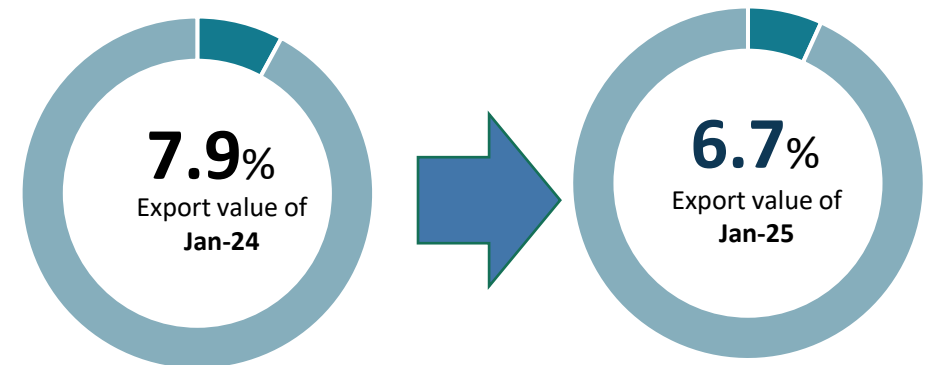
52.2 Mil.USD

- ↘ Decrease **12.1%** compared to Dec-24
- ↘ Decrease **12.2%** compared to Jan-24
- ▼ **0.7 Mil.USD** less than the monthly average rate in 2024.
- ◇ Accumulated 1 month of 2025 reaches 52.2 Mil.USD, and the rate is **8.2%** of the total in 2024.

Percentage of export value to ASEAN, Nov-2024



Change in percentage of export to ASEAN, Nov-2024

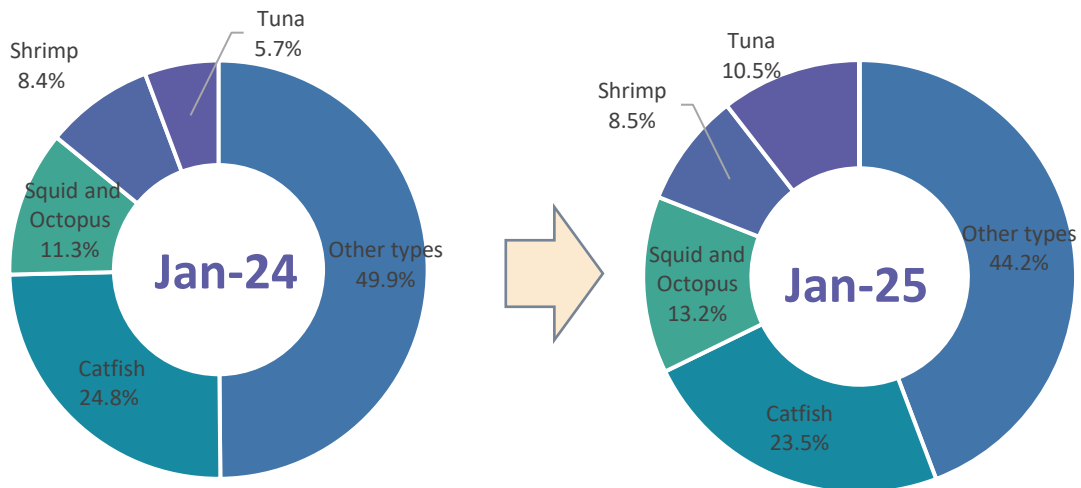


Source: Calculated from data the Department of Vietnam Customs

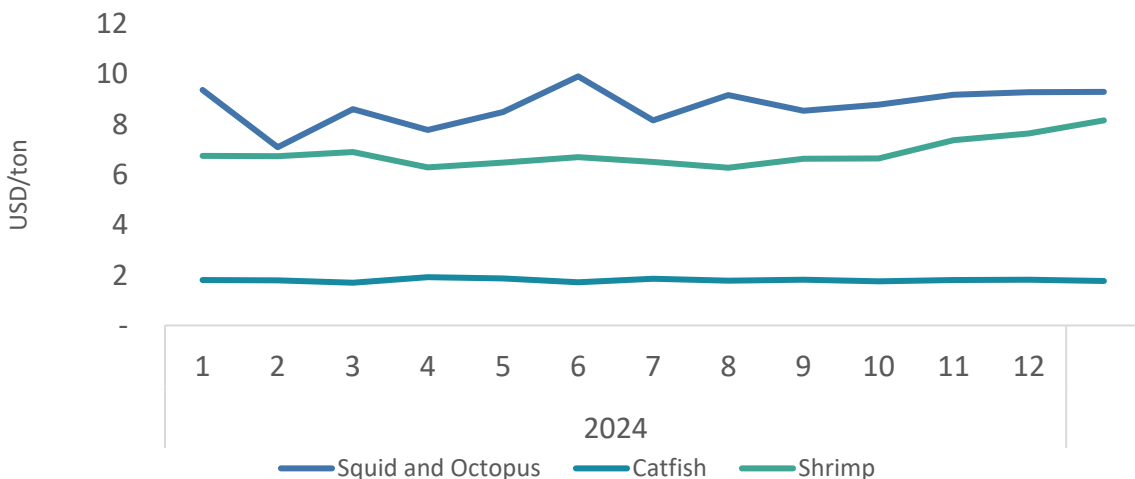


FISHERIES

Structure of exports by products to ASEAN, Jan-2025



Average export price to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



Catfish

Value: **12.3** Mil.USD

Decrease 8.7% compared to Dec-24

Decrease 16.6% compared to Jan-24



Squid & Octopus

Value: **6.9** Mil.USD

Increase 9.7% compared to Dec-24

Increase 2.9% compared to Jan-24



Shrimp

Value: **4.4** Mil.USD

Decrease 20.1% compared to Dec-24

Decrease 11.1% compared to Jan-24

Squid & Octopus

The average export price in Jan-24 is **9.3 USD/kg**; **Increase 0.1%** compared to the previous month; and **Decrease 0.8%** compared to the same month in 2024.

Cá da trộn

The average export price in Jan-24 is **1.8 USD/kg**; **Decrease 2.9%** compared to the previous month; and **Decrease 1.9%** compared to the same month in 2024.

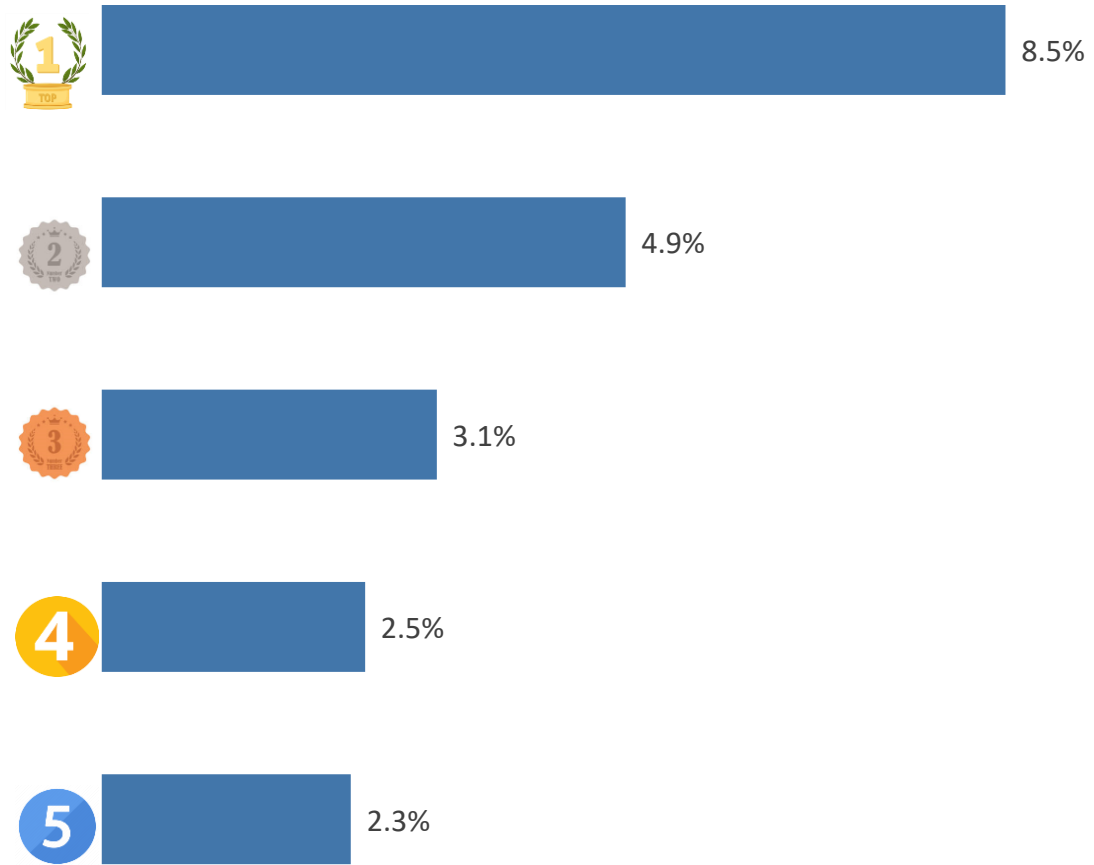
Shrimp

The average export price in Jan-24 is **8.2 USD/kg**; **Increase 6.8%** compared to the previous month; and **Increase 21.0%** compared to the same month in 2024.

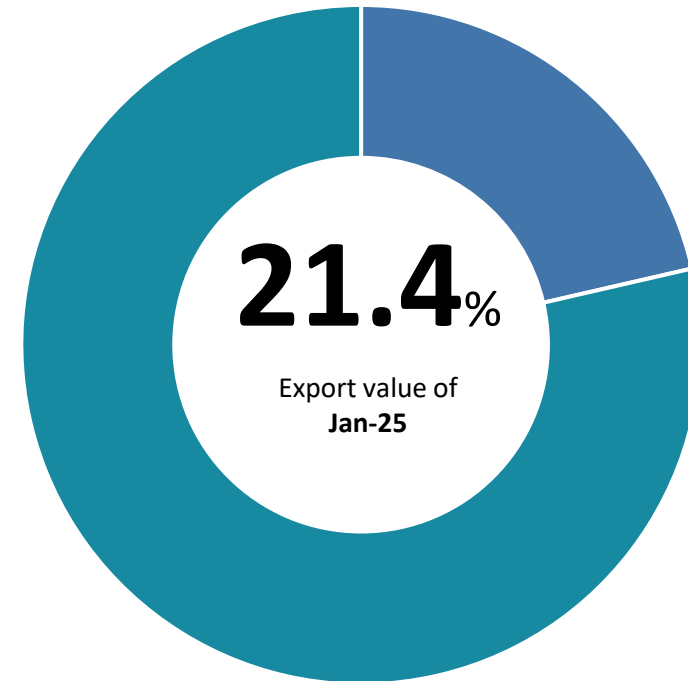


FISHERIES

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



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



01

Thailand's Seafood Exports strongly grew in 2024.

In 2024, Thailand's seafood exports reached \$7.14 billion, marking the highest level in the past ten years. Compared to 2023, export revenue increased by 13.51%, rising from \$6.29 billion, driven by the strong performance of processed seafood products, particularly canned tuna.

Over the past year, Thailand exported 548,600 tons of canned tuna, generating \$2.45 billion, reflecting a 32% increase in volume and a 34% increase in value compared to the previous year. Conversely, shrimp and shrimp-based products experienced a decline, with exports volume of 136,700 tons, valued at \$1.29 billion, representing a 0.38% decrease in volume and a 5% decrease in value. This decline was primarily attributed to a reduced domestic shrimp supply and weakened demand in major markets such as the United States and Japan.

The Thai Department of Fisheries predicts that seafood exports in 2025 will continue to grow due to the strong global demand.



Source: Asian-agribiz (2/2025)



01

Thailand and China Sign New Agreement to promote Seafood Trade

In February, Thailand and China signed a new agreement aimed at simplifying seafood trade procedures, paving the way for large-scale exports of Thailand's farmed fish products.

The agreement was signed during Thai Prime Minister Paetongtarn Shinawatra's visit to China, establishing inspection procedures and sanitary standards for Thailand's seafood exports. Barramundi (Asian sea bass) is the first product approved under this agreement, with an expected annual export volume of over 50,000 tons, generating more than 4.9 billion Baht (\$144.6 million USD).

This agreement marks a significant milestone in Thailand-China trade relations, facilitating Thai seafood exporters in expanding market share and achieving long-term sustainable growth..

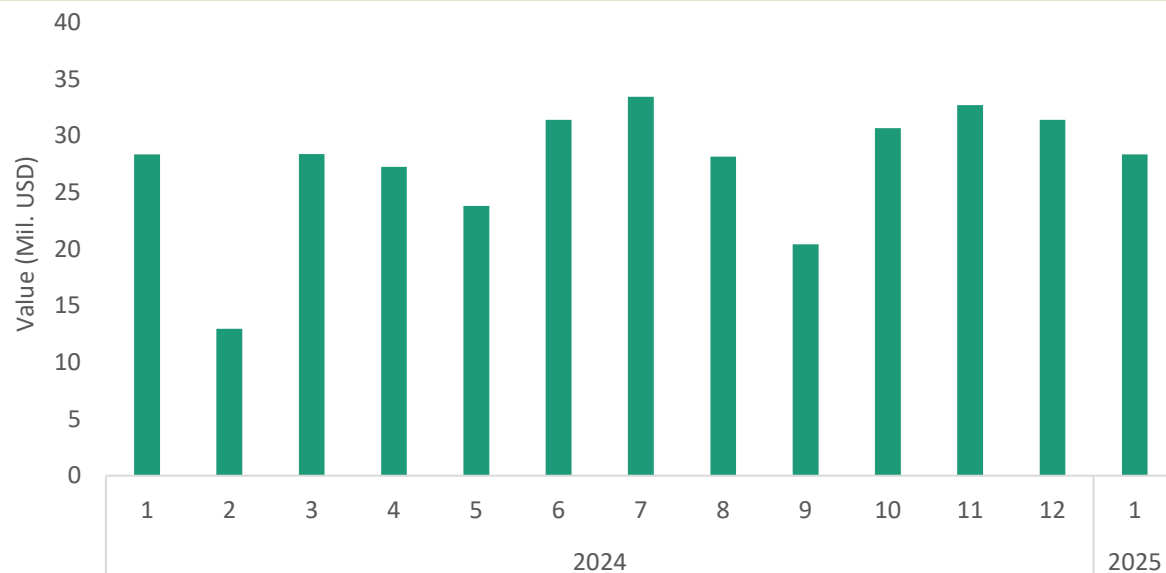
Source: chinaseafoodexpo.com (2/2025)





WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025

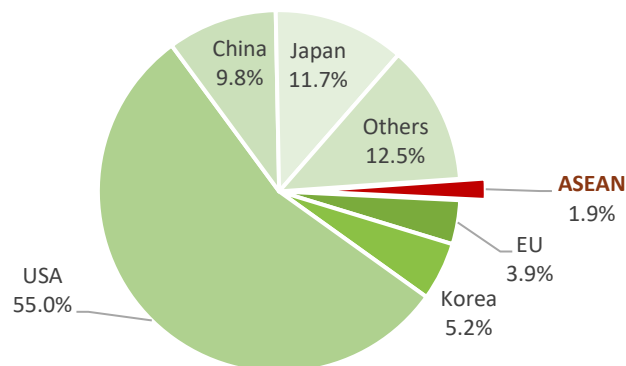


27

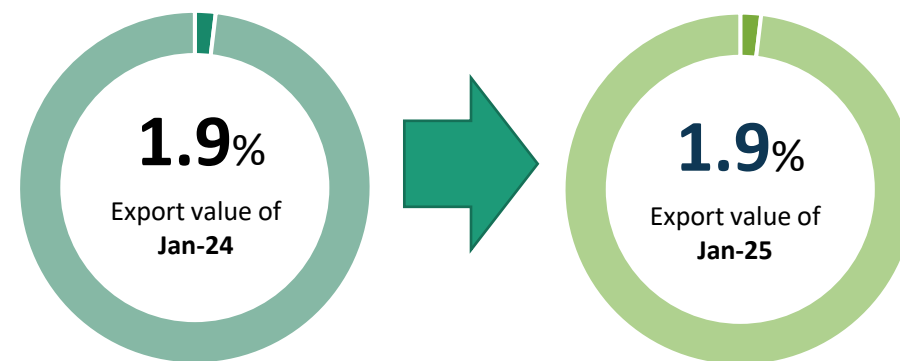
Mil.USD

- Decrease **14.8%** compared to Dec-24
- Decrease **5.6%** compared to Jan-24
- ↓ **0.6 Mil.USD** less than the monthly average rate in 2024.
- ❖ Accumulated 1 month of 2025 reaches **26.8 Mil.USD**, and the rate is **8.1%** of the total in 2024.

Percentage of export value to ASEAN, Jan-2025



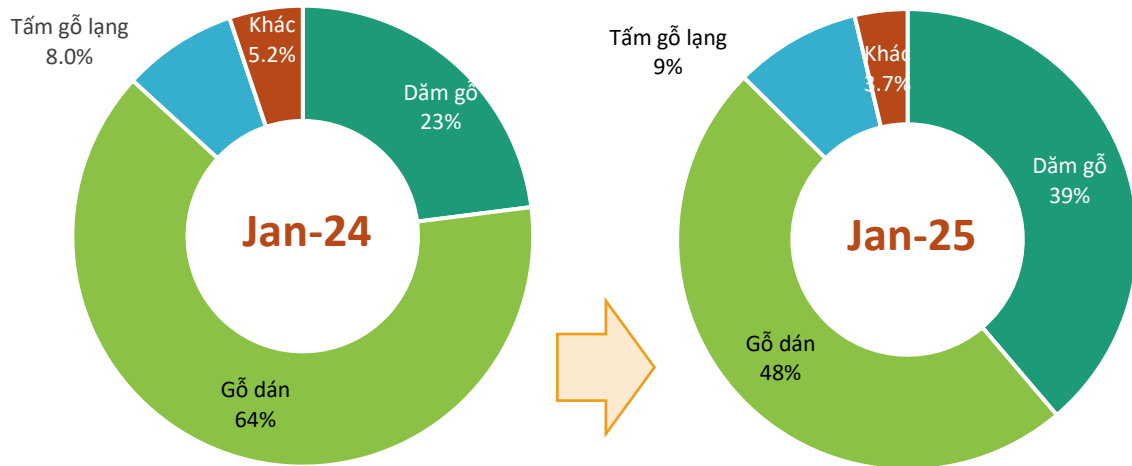
Changes in percentage of export value to ASEAN, Jan-2025





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



Plywood

Value: **18.9** Mil.USD

Decrease **21%** compared to Dec-24

Decrease **15%** compared to Jan-24



Wood chips

Value: **15.1** Mil.USD

Decrease **17%** compared to Dec-24

Increase **89%** compared to Jan-24



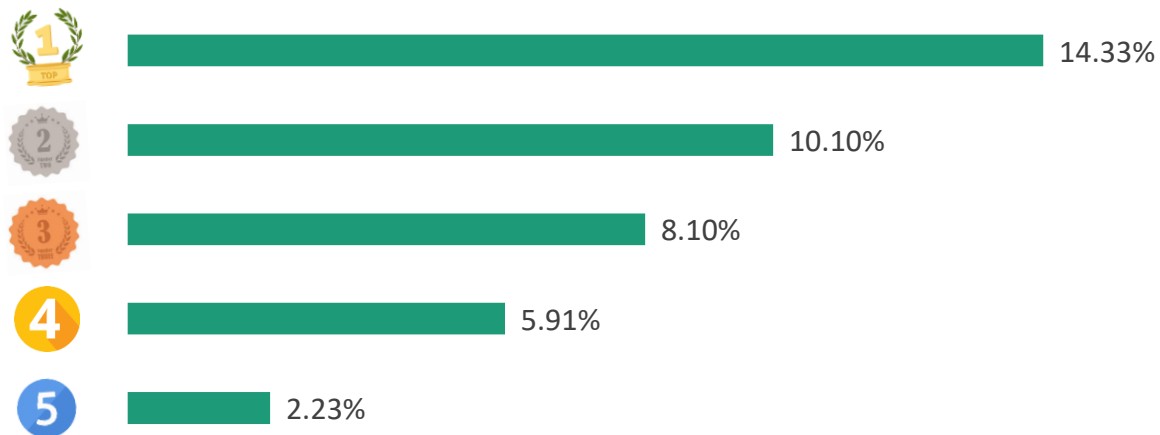
Wood slabs

Value: **3.4** Mil.USD

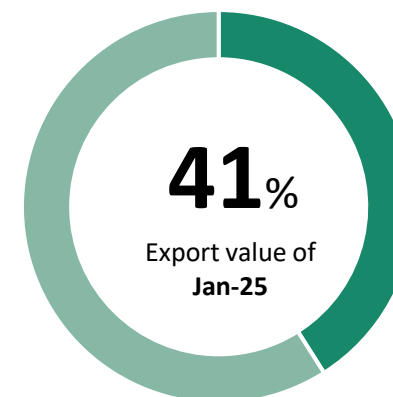
Decrease **21%** compared to Dec-24

Increase **24%** compared to Jan-24

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



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





WOOD & WOODEN PRODUCTS



SPOTLIGHT

According to Malaysia's Ministry of Plantation and Commodities, the country's wood product exports grew by nearly 5% in 2024, reaching RM 22.9 billion (\$5.13 billion USD), compared to RM 21.85 billion (\$4.89 billion USD) in 2023. The ministry has set a target for wood exports to reach RM 28 billion (\$6.27 billion USD) in 2025.

Minister Datuk Seri Johari Abdul Ghani stated that the wood sector is Malaysia's third-largest contributor to NTLs (Natural Resource-Based Trade) exports, following palm oil (RM 114 billion - \$25.54 billion USD) and rubber (RM 33 billion - \$7.39 billion USD).

The Indonesian Ministry of Industry continues to develop the value chain of forestry products, focusing on fostering the creative furniture and enhancing competitiveness to create jobs, boost exports, and reduce imports.

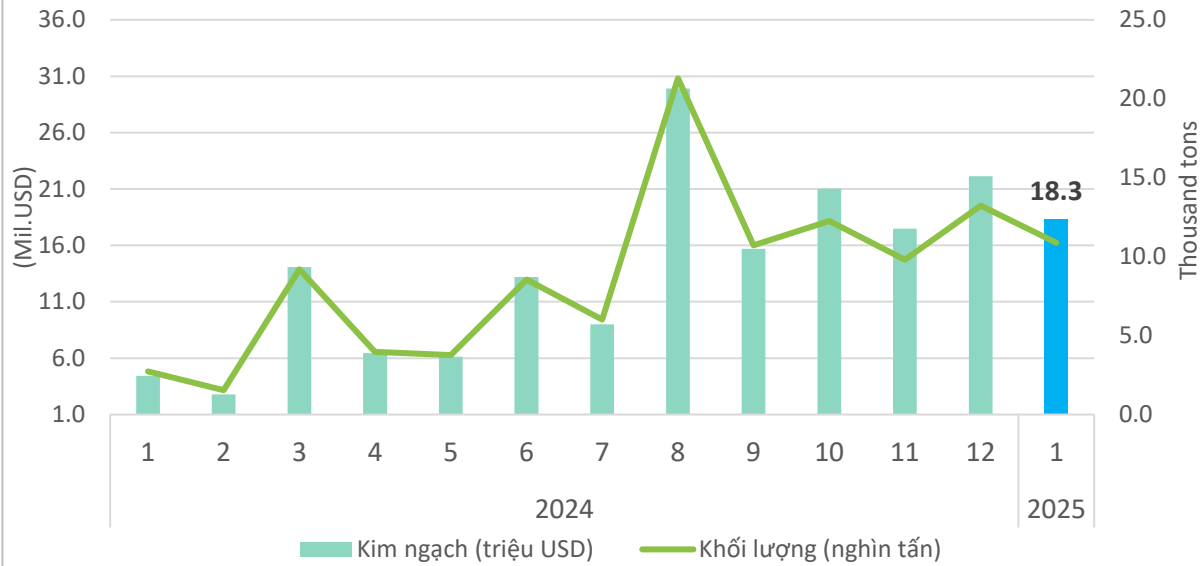
In 2024, Indonesia's furniture sector contributed 1.15% to GDP. Over the first 11 months of 2024, furniture exports (HS 9401-9403) reached \$1.47 billion, marking a 0.7% increase compared to the previous year.

However, the sector faces multiple challenges, including rising logistics costs driven by geopolitical instability and environmental sustainability regulations in export markets. Additionally, the growing import of metal and plastic furniture has intensified competition for the wood furniture sector.



RUBBER

Export volume and value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025

VALUE

18.3 Mil.USD

↘ Decrease **17.4%** compared to Dec-24

↗ Increase **313** compared to Jan-24

↑ **4.77** Mil.USD more than the monthly average rate in 2024.

◇ Accumulated 1 month of 2025 reaches **18.3** tr.USD, and the rate is **11%** of the total in 2024

VOLUME

10.9 nghìn tấn

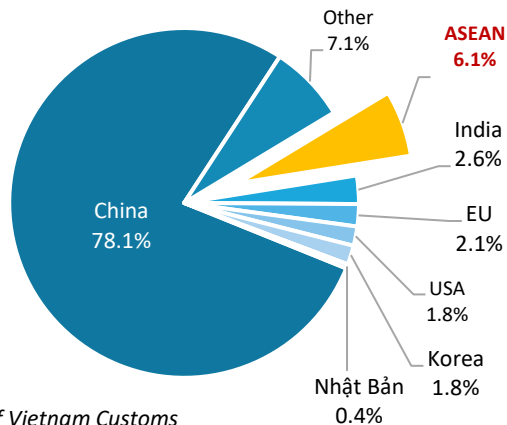
↘ Decrease **17.8%** compared to Dec-24

↗ Increase **299%** compared to Jan-24

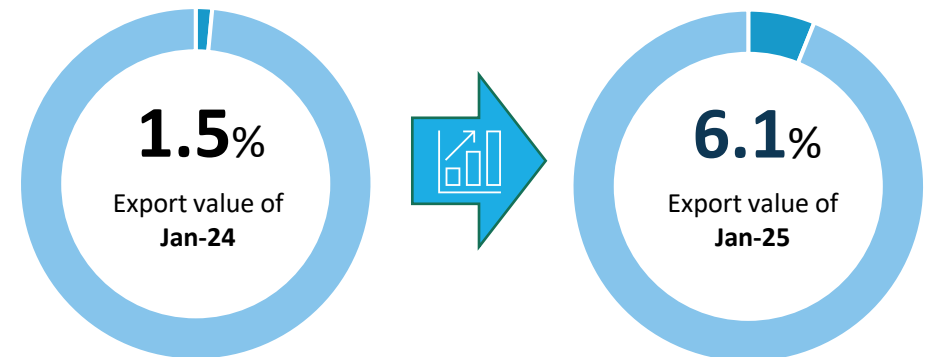
↑ **2.28** thousand tons more than the monthly average rate in 2024.

◇ Accumulated 1 month of 2025 reaches **10.9** thousand tons, and the rate is **10.5%** of the total in 2024.

Percentage of export value to ASEAN, Jan-2025



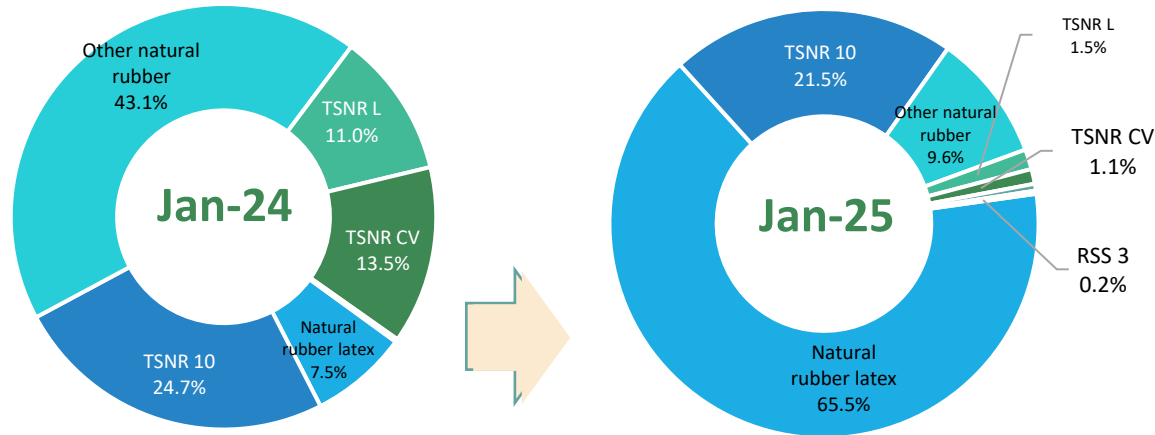
Changes in percentage of export value to ASEAN, Jan-2025





RUBBER

Structure of exports by products to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



Natural rubber latex

Value: **1.8** Mil.USD

Decrease **22%** compared to Dec-24

Decrease **8%** so với T01/2024



TSNR CV

Value: **3.94** Mil.USD

Decrease **34%** compared to Dec-24

Increase **260%** so với T01/2024



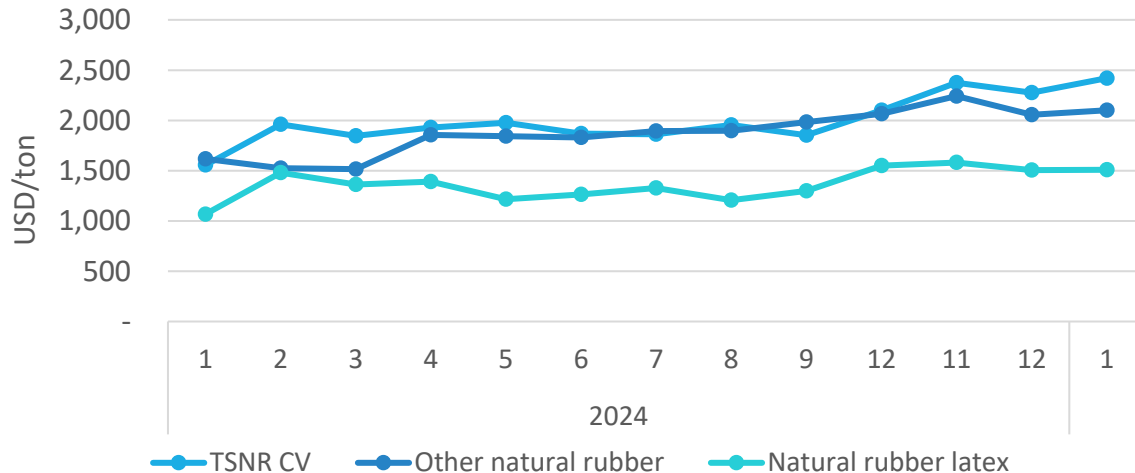
Other natural rubber

Value: **12** Mil.USD

Decrease **3%** compared to Dec-24

Increase **3521%** so với T01/2024

Average export price to ASEAN, Jan-2025



Natural rubber latex

The average export price in Dec-24 is **2.101** USD/ton; Increase **2.1%** compared to the previous month; and Increase **30%** compared to the same month in 2024.

TSNR CV

The average export price in Dec-24 is **2.420** USD/ton; Increase **6.4%** compared to the previous month; and Increase **56%** compared to the same month in 2024.

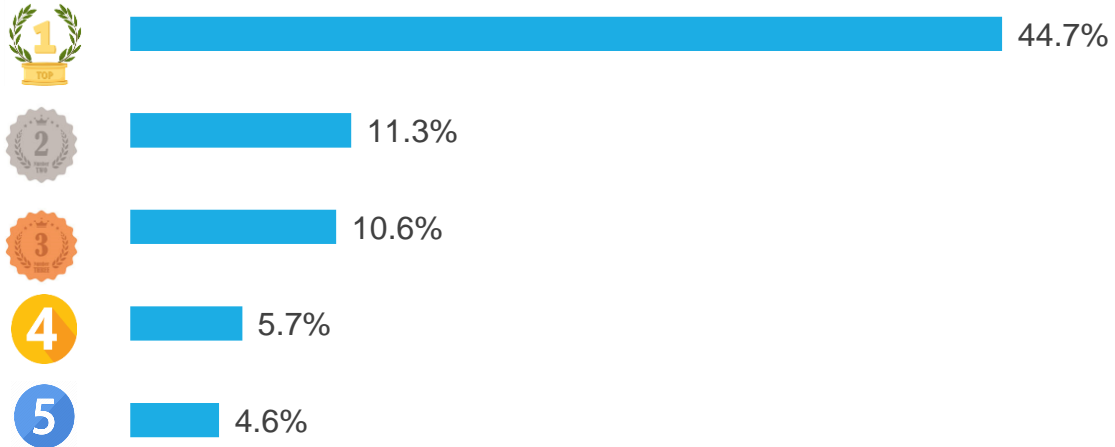
Other natural rubber

The average export price in Dec-24 is **1.509** USD/ton; Increase **0.3%** compared to the previous month; and Increase **41%** compared to the same month in 2024.

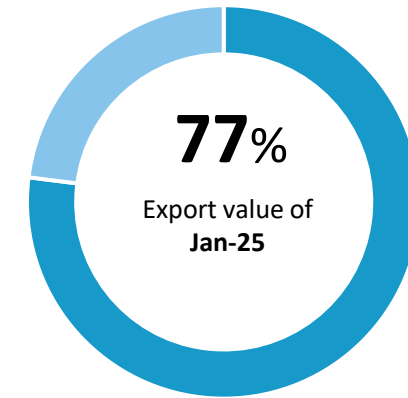


RUBBER

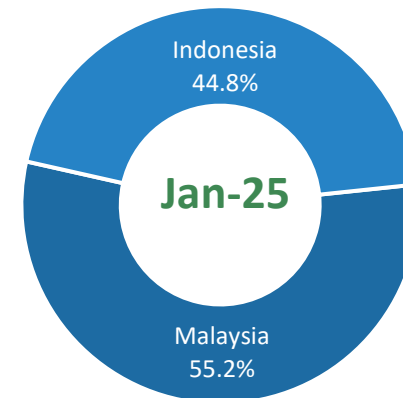
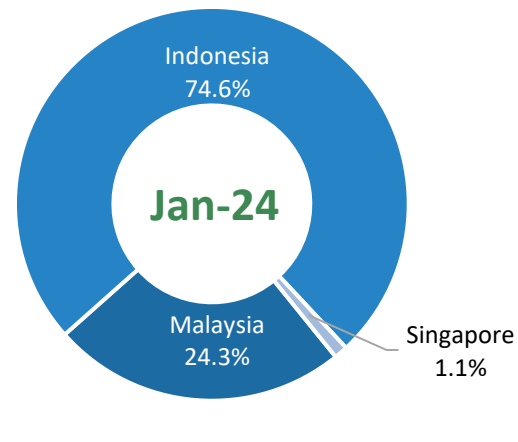
TOP 5 export enterprises by value to ASEAN, Jan-2025



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



Fluctuations in the proportion of Vietnam's rubber exports to ASEAN, Jan-2025





RUBBER

SPOTLIGHT

❖ Thailand's Rubber Exports will Decline by 8.8% in 2025

The Economic Intelligence Center (EIC) of Siam Commercial Bank (SCB) forecasts that Thailand's rubber export value and volume will decrease by 8.8% to \$4.5 billion and 2.2% to 2.8 million tons in 2025, respectively. The average export price will fall by 6.7% to \$1,608 per ton. The main reason of this decline is due to slower global economic growth, extreme weather conditions, and rubber leaf fall disease.

Additionally, Thailand's rubber industry faces challenges from the European Union Deforestation Regulation (EUDR), which will take effect on December 30, 2025, imposing stricter controls on the import and export of deforestation-free products.

To deal with these challenges, Thai businesses need to diversify markets and products, expand supply sources, and manage price risks. The enterprises' competitiveness focus on sustainable development, emission reduction, and resource efficiency to strengthen its market position.

Source: Research Center of Siam Commercial Bank (SCB EIC) Thailand





RUBBER

SPOTLIGHT

❖ Indonesia's natural rubber exports in 2024 is the lowest level in a decade, the 2025 outlook remains challenging

Indonesia is one of the world's largest producers and suppliers of natural rubber. It's rubber output accounts for about 18% of the world's total natural rubber supply. In 2024, Indonesia's natural rubber exports is 1.67 million tons, down 7.07% compared to 2023, the lowest level since 2014. The main reason is that aging rubber trees reduce productivity and labor shifts to palm oil cultivation. In addition, the EU's EUDR regulation also negatively affects exports.

In 2025, Indonesia's rubber exports may continue to decrease but at a low rate due to the postponement of EUDR implementation and increased global market demand. Weather fluctuations, especially the La Niña phenomenon, may affect output, but high prices may stimulate latex tapping, helping to restore the country's rubber production and exports.

Source: Cục Thống kê Trung ương Indonesia





RUBBER

SPOTLIGHT

❖ Strategic Restructure is an important element to Boost Malaysia's Natural Rubber sector

Malaysia dropped to 10th position in global natural rubber production. To recover, Malaysia needs a comprehensive strategy to stabilize prices and support farmers. The government aims to restore Malaysia's position as a leading rubber producer within the next decade, allocating a \$18 million budget to redevelop abandoned plantations and support production.

Currently, Malaysia has one million hectares of rubber plantations, but inefficient tapping due to low prices and labor shortages has driven production below 400,000 tons, forcing the country to import rubber.

Key recovery solutions include expanding rubber applications in green industries, collaborating with other producing countries to stabilise prices, implementing production quotas, providing technical support to enhance productivity, and promoting intercropping to mitigate price volatility risks.





RUBBER

SPOTLIGHT

❖ **Cambodia earns nearly 80 million USD from rubber and rubberwood exports in January 2025.**

In January 2025, Cambodia exported 38,873 tons of rubber, a 6.3% decrease compared to the same period last year, generating a total revenue of \$75.15 million. Additionally, rubberwood exports reached 1,946 cubic meters, valued at \$0.43 million.

Currently, Cambodia's total rubber plantation area stands at 425,443 hectares, with 330,259 hectares (78%) under tapping and 95,184 hectares (22%) still in the cultivation phase.

Besides exports, Cambodian rubber also provides raw material for three tire manufacturers in the Svay Rieng, Preah Sihanouk, and Kratie provinces.

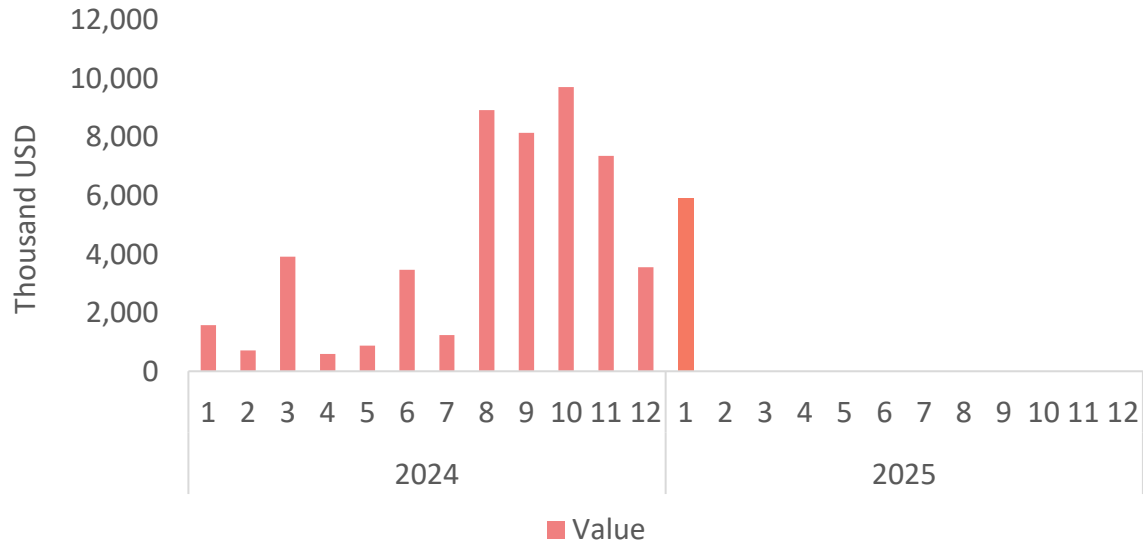
Source: *Theo thmeythmey.com*



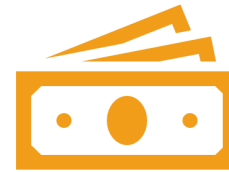


MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



5.92

Mil.USD

VALUE

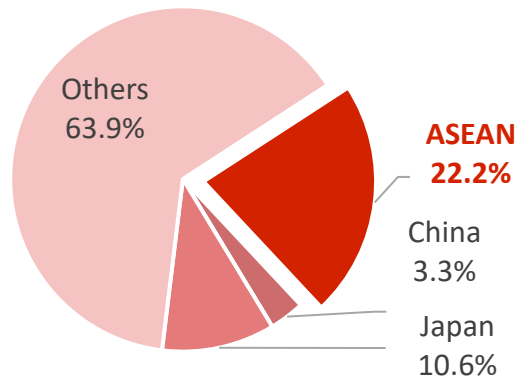
↗ Increase **66.2%** compared to Dec-24

↗ Increase **275%** compared to Jan-24

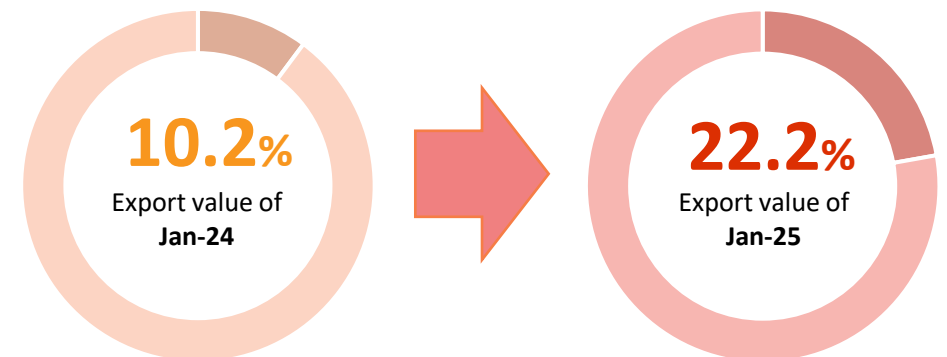
↗ **1.75 Mil.USD** more than the monthly average rate in 2024.

◇ Accumulated 1 month of 2025 reaches **5.92 Mil.USD**, and the rate is **11.8%** of the total in 2024.

Percentage of export value to ASEAN, Jan-2025



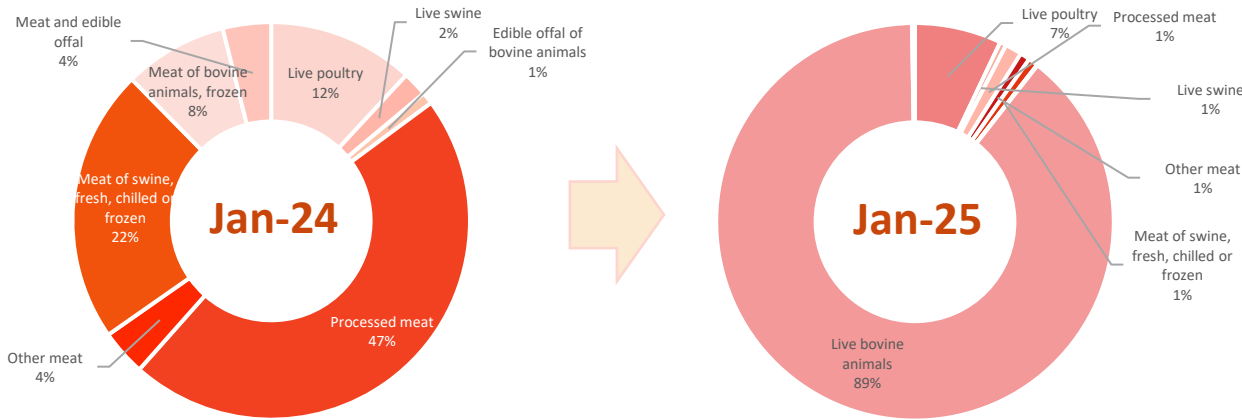
Changes in percentage of export value to ASEAN, Jan-2025





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Jan-2025



Export results to ASEAN, Jan-2025



Live bovine animals

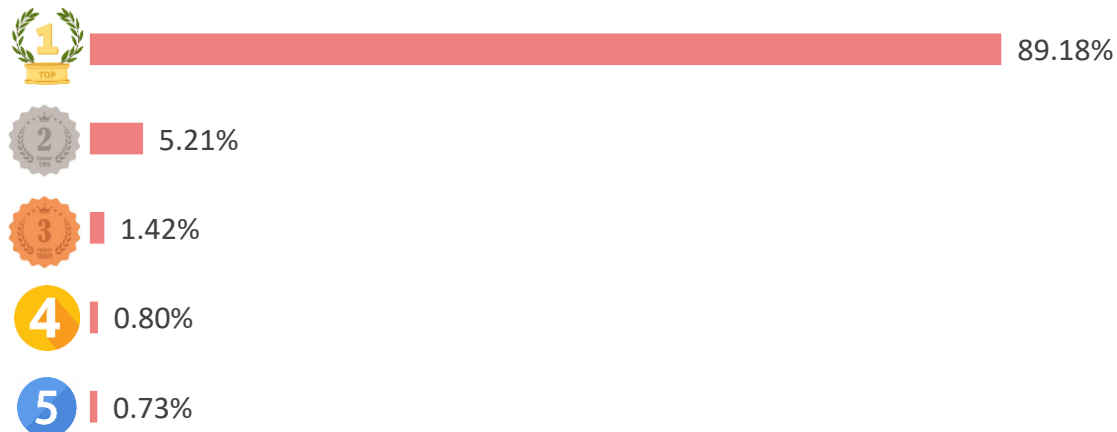
Value: **5.3** Mil.USD
 Increase **103.5%** compared to Dec-24



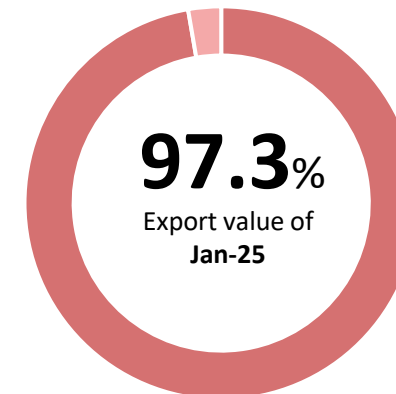
Processed meat

Value: **81.1** thousand USD
 Decrease **59.6%** compared to Dec-24
 Decrease **89%** compared to Jan-24

Percentage of export value to ASEAN, Jan-2025



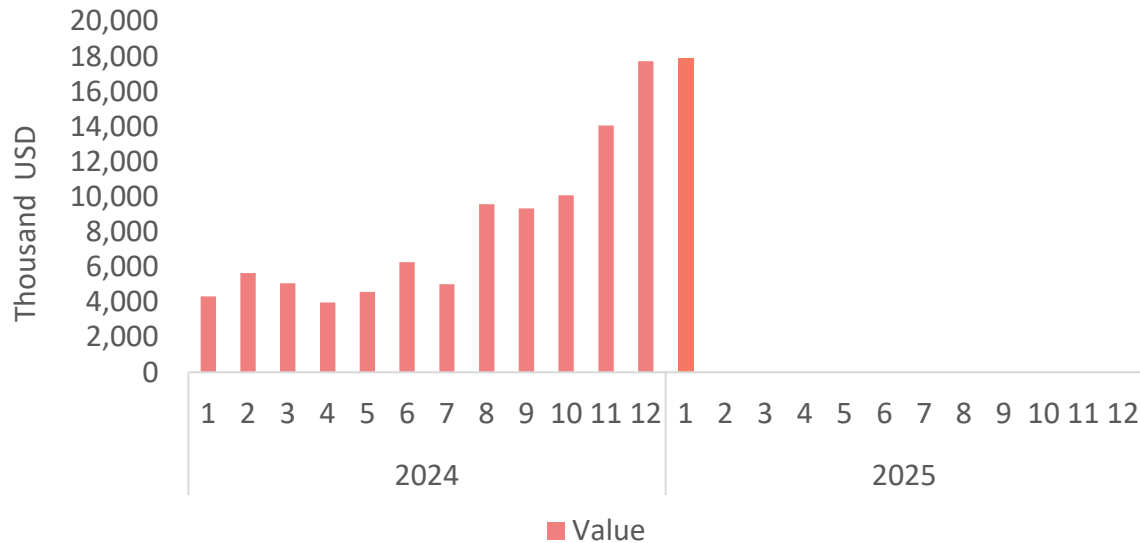
Changes in percentage of export value to ASEAN, Jan-2025






MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Jan-2025



Import results to ASEAN, Jan-2025



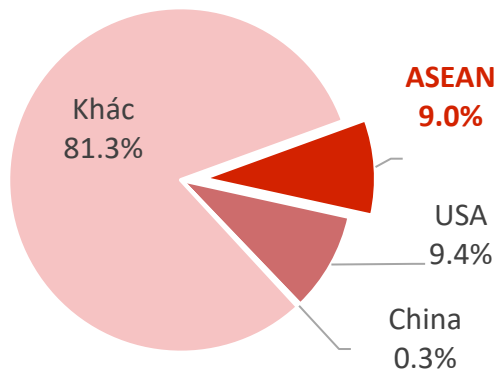
17.9

Mil.USD

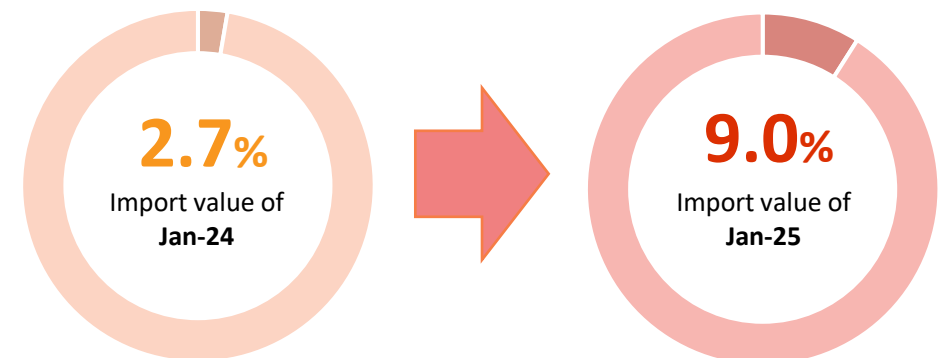
VALUE

- ↗ Increase **1%** compared to Dec-24
- ↗ Increase **314.2%** compared to Jan-24
- ↗ **9.9 Mil.USD** more than the monthly average rate in 2024.
- ◇ Accumulated 1 month of 2025 reaches **17.9 Mil.USD**, and the rate is **18.7%** of the total in 2024.

Percentage of import value to ASEAN, Jan-2025



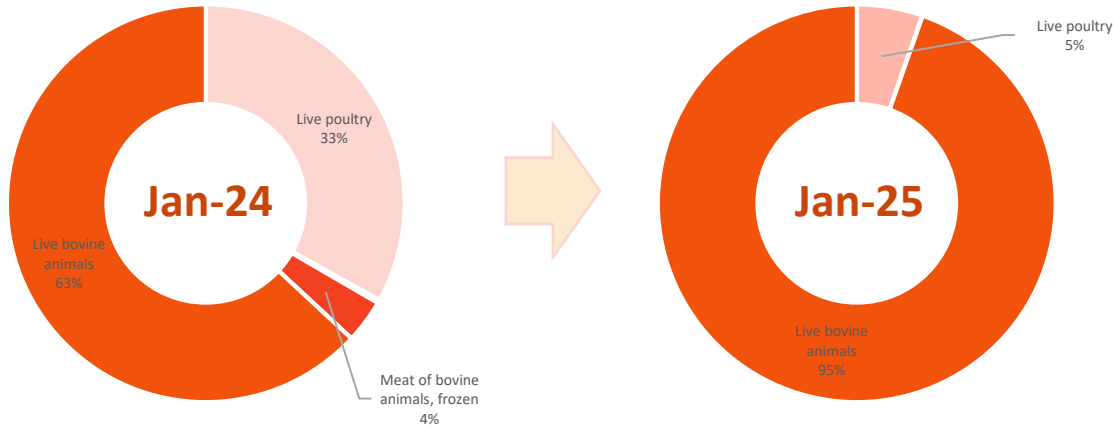
Changes in percentage of import value to ASEAN, Jan-2025





MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Jan-2025



Import results to ASEAN, Jan-2025



Live bovine animals

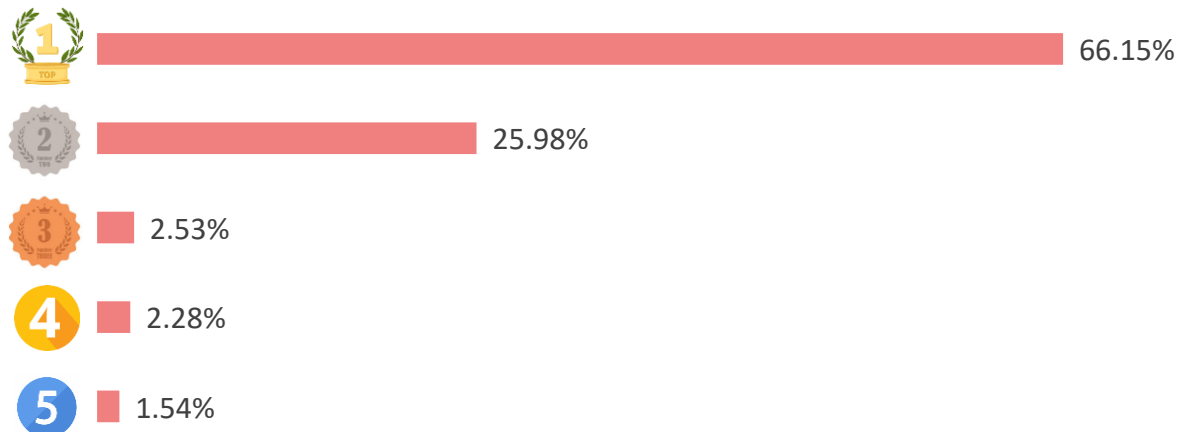
Value: **16.94** Mil.USD
 Increase **4.88%** compared to Dec-24
 Tăng **52 lần** compared to Jan-24



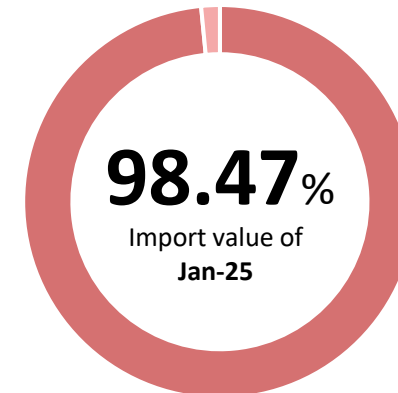
Live poultry

Value: **956.4** nghìn USD
 Decrease **38.9%** compared to Dec-24
 Decrease **33.15%** compared to Jan-24

Percentage of import value to ASEAN, Jan-2025



Changes in percentage of import value to ASEAN, Jan-2025





MEAT & MEAT PRODUCTS

SPOTLIGHT



In 11 months of 2024, the Philippines imported over 1.3 million tons of meat, an increase of 127,000 tons compared to the same period in 2023 (1.2 million tons) and approaching the record-high import level set in 2022. Of which, pork accounted for the largest share at 672,000 tons, followed by chicken (435,501 tons), beef (187,711 tons), buffalo meat (35,219 tons), turkey (1,272 tons), lamb (613 tons), and duck (208 tons).

Notably, pork imports in 2024 grew by 14% year-on-year, increasing by nearly 80,000 tons from 591,000 tons in 2023. Brazil remained the Philippines' largest pork supplier, delivering 185,000 tons of pork during this period.

Source: 3tres3





MEAT & MEAT PRODUCTS

SPOTLIGHT

In 2024, Thailand exported 53,000 breeding pigs, generating a total revenue of 303 million Baht (\$8.92 million). This represented a 10.82% increase in volume compared to 47,827 pigs in 2023, but a 23.95% decline in value from 399 million Baht (\$11.75 million) last year.

Live pig exports saw significant growth, reaching 108,000 pigs with a total of 490 million Baht (\$14.42 million). This marked a 31.94% increase in volume (compared to 81,858 pigs in 2023) and a 28.71% rise in value (compared to 380 million Baht or \$11.19 million).

Thailand also exported 2,140 tons of chilled and frozen pork, valued at 220 million Baht. Although export volume increased by 8.88% from 1,965 tons in 2023, export value declined by 14.63% compared to 258 million Baht (\$7.59 million) last year. The main export markets included Hong Kong, Myanmar, and Laos.

Notably, processed pork exports reached 4,780 tons, bringing in 1.065 billion Baht (\$31.35 million), a 19.81% increase in volume (compared to 3,990 tons in 2023) and a 13.38% rise in value (compared to 939 million Baht or \$27.64 million).

In 2024, Thailand imported 274 tons of pork products, valued at 94 million Baht (\$2.77 million). This represented a 24.9% increase in volume compared to 220 tons in 2023, and a 19.17% increase in value from 79 million Baht (\$2.33 million). Additionally, Thailand imported 10,890 tons of other edible pork parts (such as skin, liver, and other organs), valued at 155 million Baht (\$4.56 million). This marked a 49.2% decline in volume (compared to 21,437 tons in 2023) and a 55.8% drop in value from 351 million Baht (\$10.33 million) last year.

Source: vietnambiz.vn





Any comments, please send to:

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