



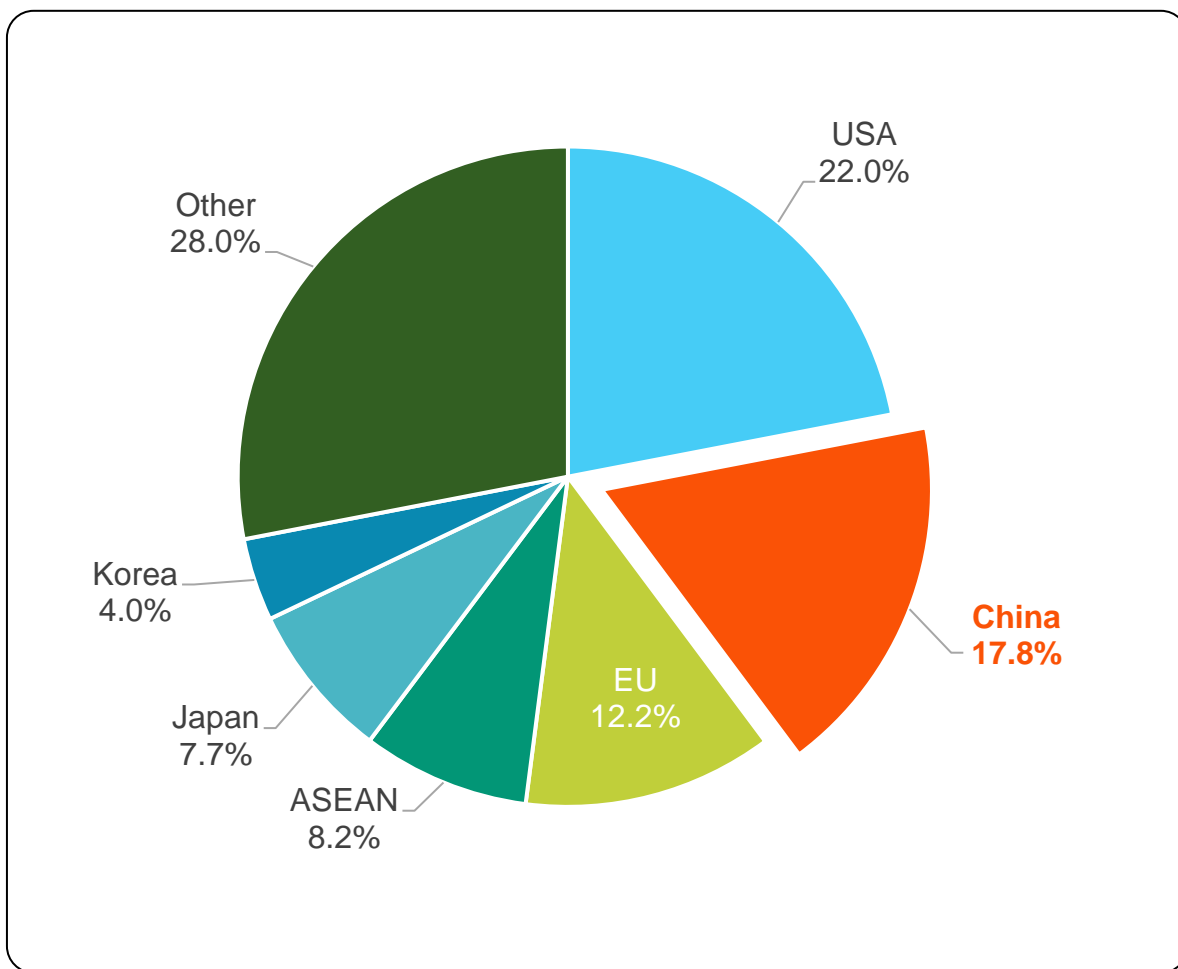
**MONTHLY REPORT ON  
AGRI-PRODUCT EXPORT**

**FROM VIETNAM TO  
CHINA MARKET**



# THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO THE CHINA IN JAN-2025

## Percentage of AFF product export value to the China, Jan-2025



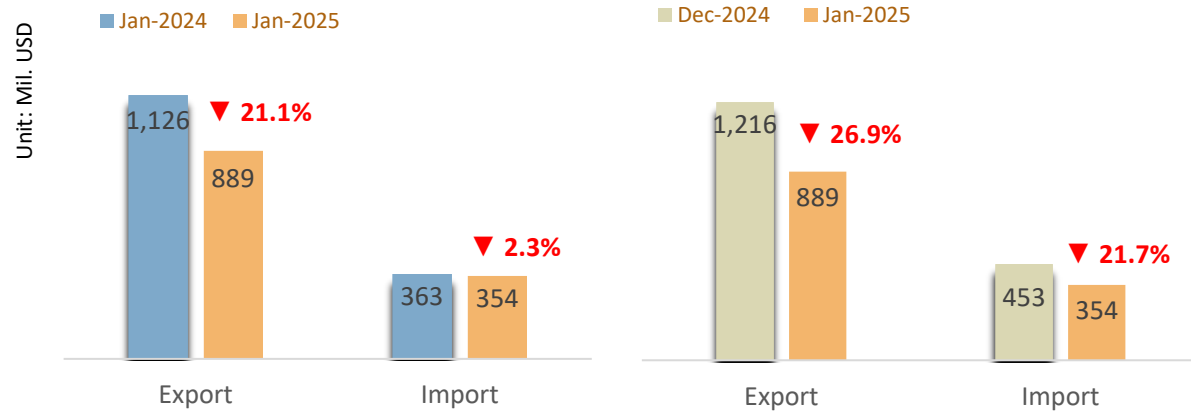
## Changes in percentage of AFF product export value to the China, Jan-2025 compared to Dec-2024 and Jan-2024

|                                   | Value (Mil.USD) | compared to Dec-2024 | compared to Jan-2024 |
|-----------------------------------|-----------------|----------------------|----------------------|
| The US                            | 1.093,94        | ▼ 0,4%               | ▲ 0,5%               |
| <b>China</b>                      | <b>887,75</b>   | <b>▼ 3,3%</b>        | <b>▼ 3,2%</b>        |
| 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%               |
| <b>Total Value of AFF product</b> | <b>4.978,74</b> |                      |                      |

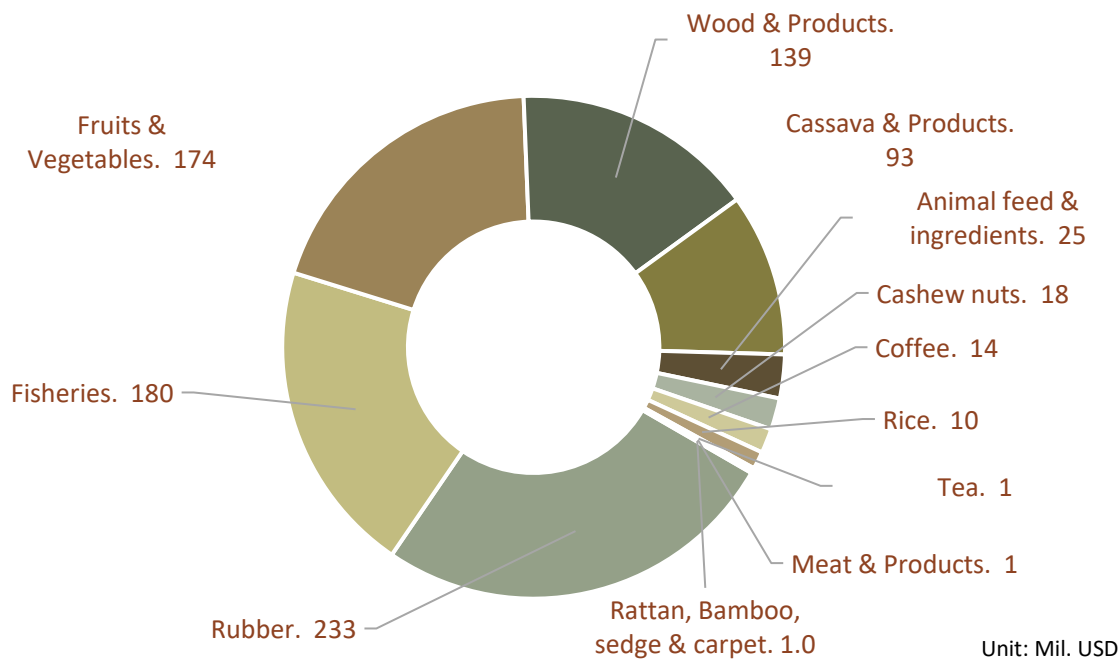
Source: Calculated from data of the Department of Customs

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

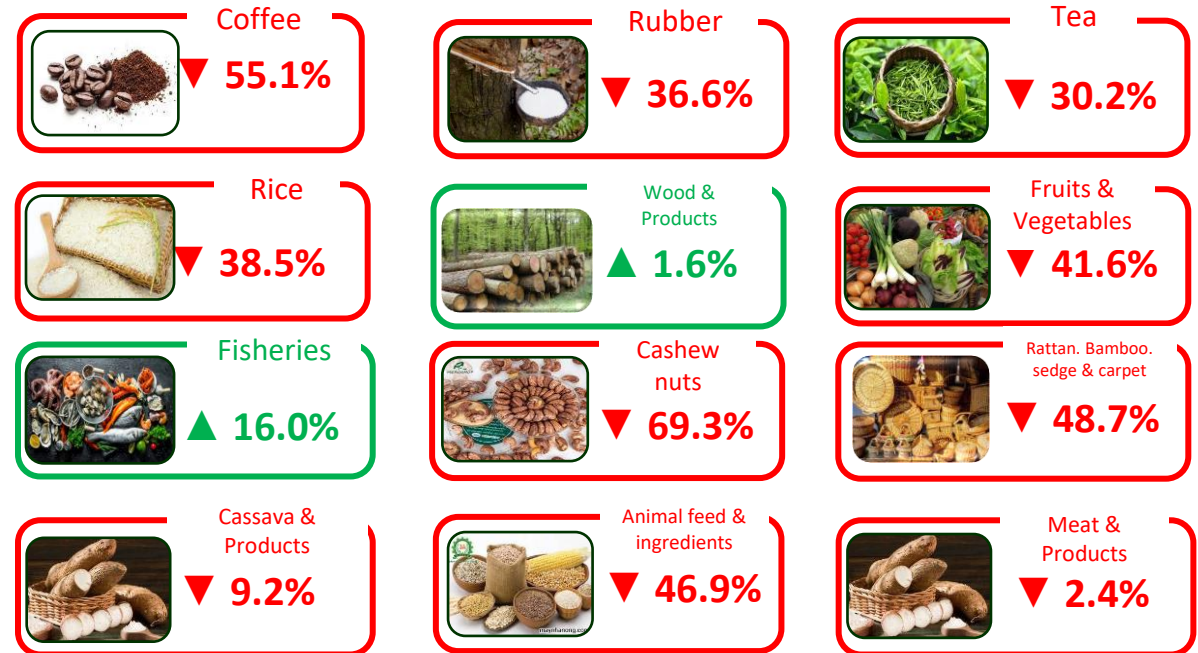
## AFF product import-export turnover between Vietnam and China, Jan-2025



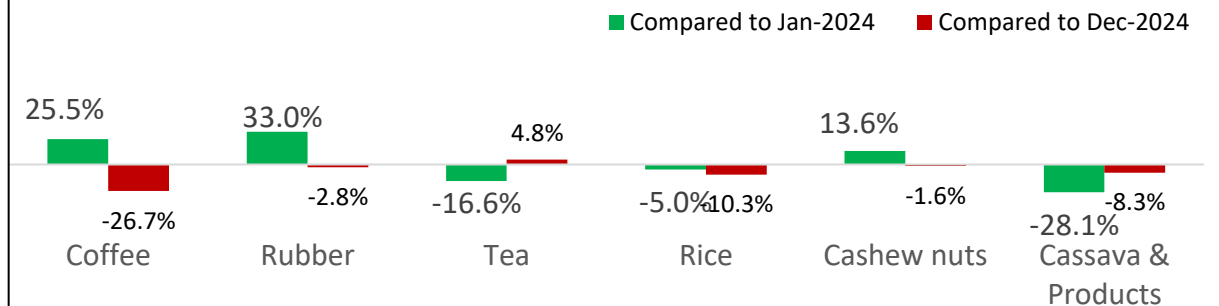
## Key AFF product export value to China, Jan-2025



## Changes in key AFF product export value to China in Jan-2025 compared to Dec-2024



## Changes in average export value of key AFF products to China in Jan-2025 compared to Jan-2024 and compared to Dec-2024





## New Challenges of Chinese Economy

The "Made in China 2025" (MIC2025) strategy is the first priority in China's economic agenda and a part of President Xi Jinping's plan to create a sustainable economic model.

MIC2025 focuses on upgrading manufacturing capabilities and ensuring China's competitiveness by adopting

modern technologies such as robotics, 5G mobile networks, artificial intelligence (AI), and the Internet.

However, this plan faces numerous challenges, especially in the context of the ongoing U.S.-China trade tension.

In fact, China's investment in research and development is not significantly different from the U.S.'s investment. However, the U.S. still holds technological advantages. With the China's continuous increasing

investment, America's dominance in certain fields may be narrowed.

Therefore, within the next 10 years, China's Gross Domestic Product (GDP) will be equal to the U.S.



Source: [Trungtamwto.vn](http://Trungtamwto.vn)

## China's Manufacturing Rebounds in February

According to China's National Bureau of Statistics (NBS), the official Purchasing Managers' Index (PMI) rose to 50.2 in February from 49.1 in the previous month, the highest level since November 2024. The non-manufacturing PMI, which includes services and construction, increased to 50.4 from 50.2 in January 2025.

Nomura Bank recently raised its forecast for China's economic growth to 4.5% from 4% based on a series of positive signals of economic recovery. However, a report

from Nomura also emphasized that Chinese economy will face many challenges in coming time.

The economic growth target for 2025, which Beijing will announce during the upcoming National People's Congress, may remain at about "5%". However, in the new context of global economy, this could be an ambitious goal, requiring additional policy support to achieve.



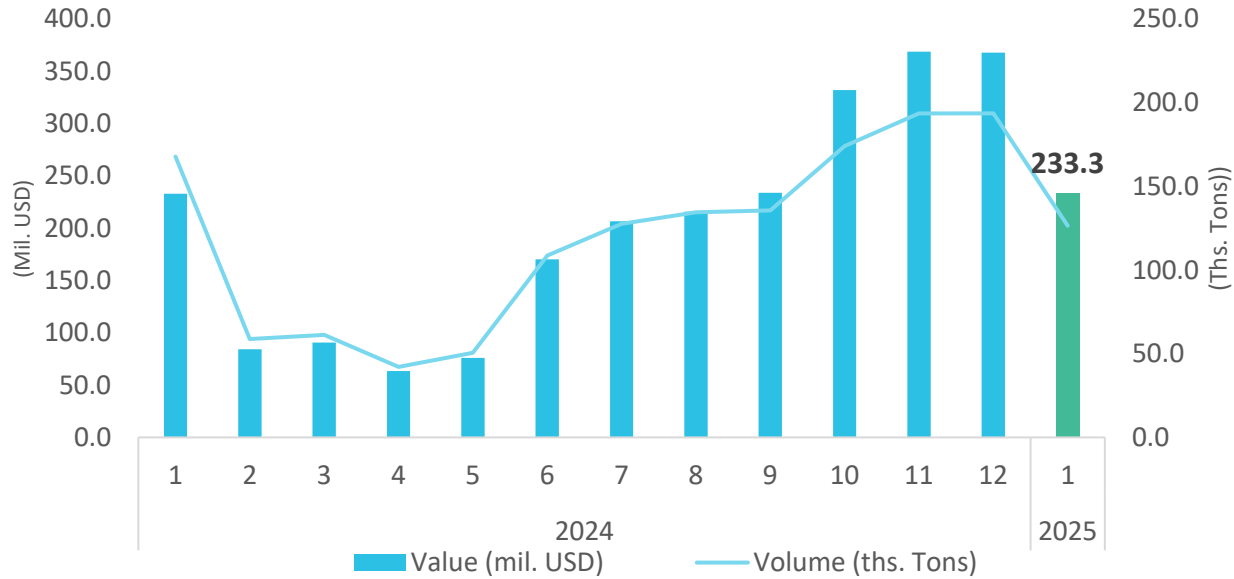
Source: [Kinhtetrunguoc.vn](http://Kinhtetrunguoc.vn)





# RUBBER

## Export volume and value to China, Jan-2025



## Export results to China, Jan-2025

### VALUE

**233.3** mil. USD

⬇ Decreases **36.6%** compared to Dec-2024

⬆ Increases **0.1%** compared to Jan-2024

⬆ **29.8 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **233.3 mil. USD, 9.6%** of total 2024

### VOLUME

**126.4** ths. tons

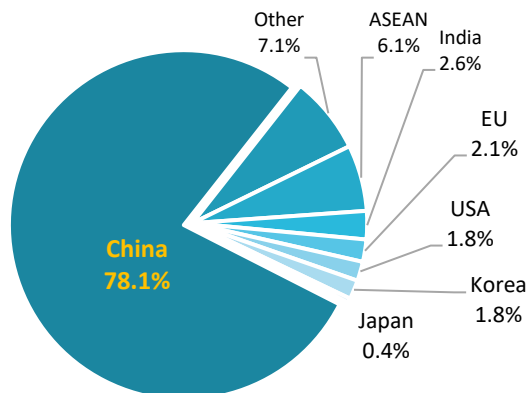
⬇ Decreases **34.7%** compared to Dec-2024

⬆ Decreases **24.7%** compared to Jan-2024

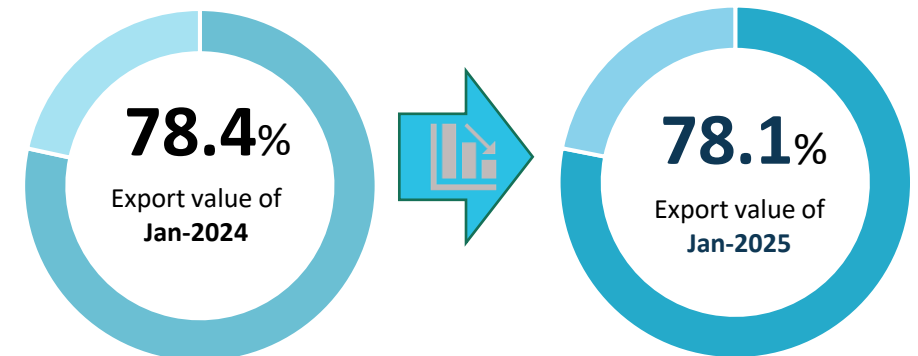
⬆ **5.7 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **126 ths. tons, 8.7%** of total 2024

## Percentage of export value to China, Jan-2025



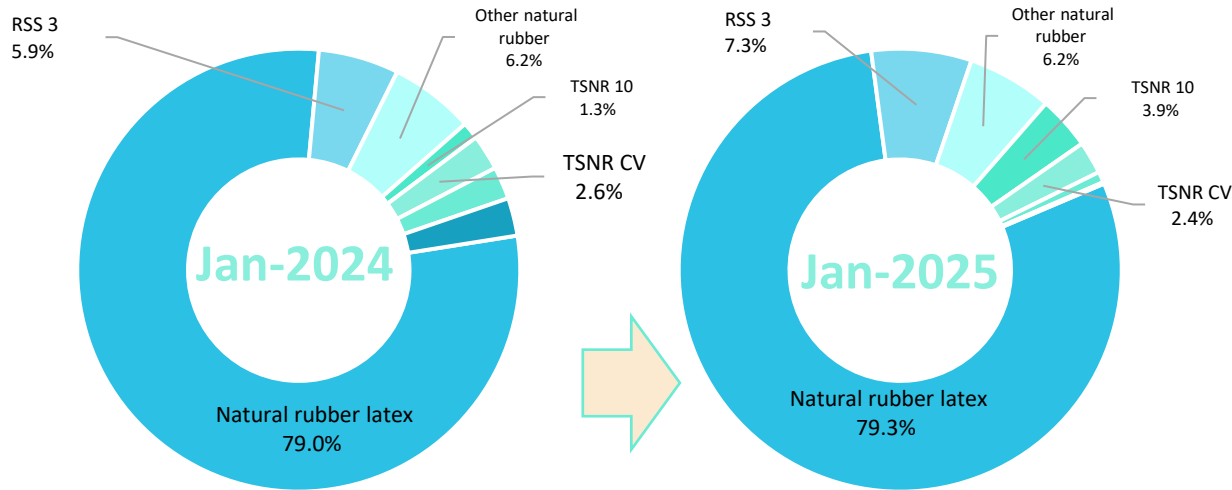
## Changes in percentage of export value to China, Jan-2025





# RUBBER

## Structure of exports by products to China, Jan-2025



## Export results to China, Jan-2025



### Natural rubber latex

Value: **185** mil. USD

Decreases **30.5%** compared to Dec-2024

Increases **0.6%** compared to Jan-2024



### RSS 3

Value: **17.1** mil. USD

Decreases **53%** compared to Dec-2024

Increases **24.5%** compared to Jan-2024



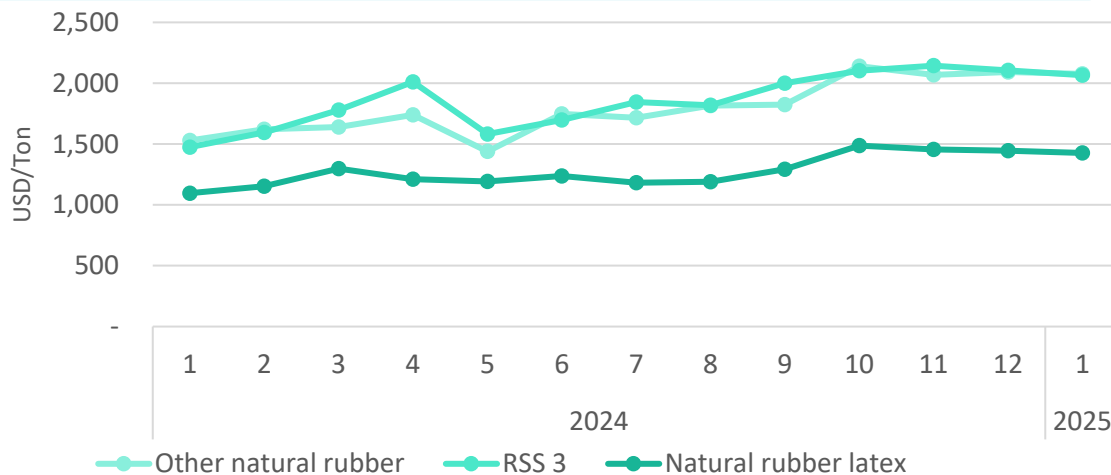
### Other natural rubber

Value: **14.5** mil. USD

Decreases **67%** compared to Dec-2024

Increases **0.8%** compared to Jan-2024

## Average export price to China, Jan-2025



### Natural rubber latex

The average export price in Jan-2025 is **1,426** USD/ton; **decreases 1.3%** compared to the previous month; and **increases 31%** compared to the same month of 2024.

### RSS 3

The average export price in Jan-2025 is **2,066** USD/ton; **decreases 1.9%** compared to the previous month; and **increases 40%** compared to the same month of 2024.

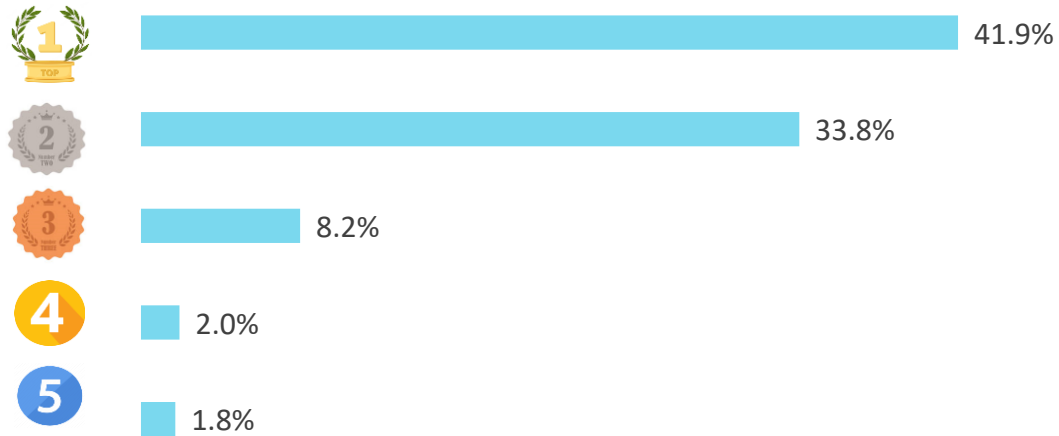
### Other natural rubber

The average export price in Jan-2025 is **2,077** USD/ton **decreases 0.7%** compared to the previous month; and **increases 34%** compared to the same month of 2024.

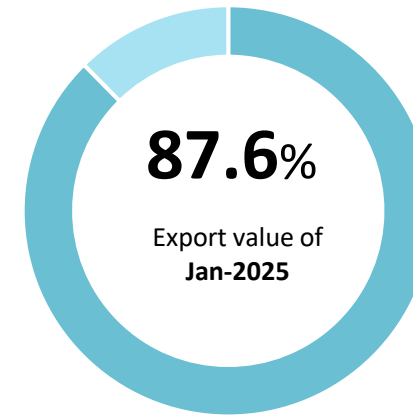


# RUBBER

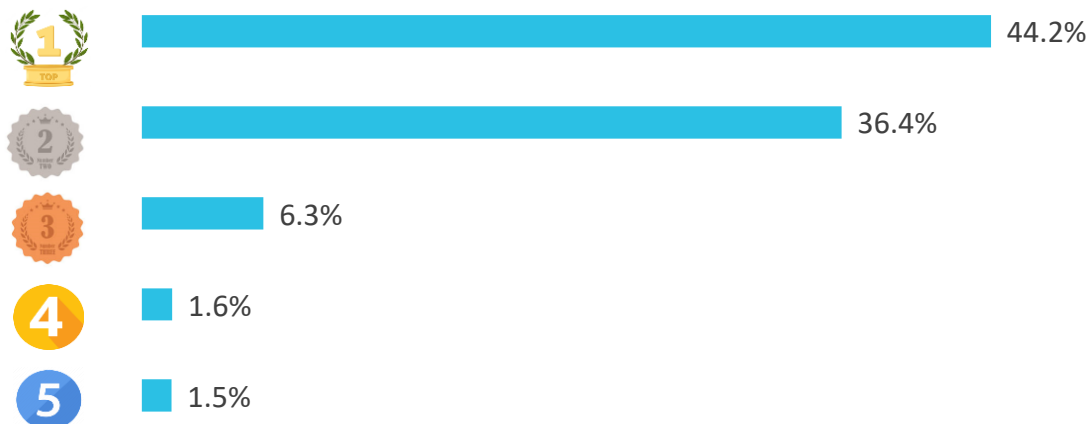
## TOP 5 export enterprises by value to China, Jan-2025



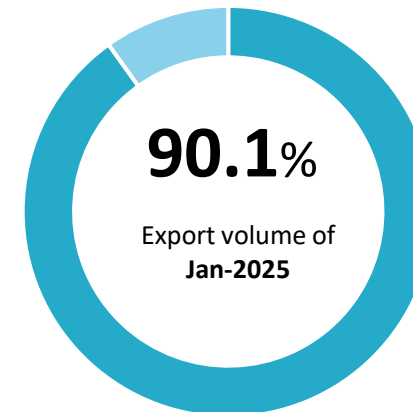
## Value ratio of TOP 5 export enterprises to China, Jan-2025



## TOP 5 export enterprises by volume to China, Jan-2025



## Volume ratio of TOP 5 export enterprises to China, Jan-2025





# RUBBER

## SPOTLIGHTS

### Market Fluctuations of Natural Rubber in Early 2025

The global rubber market is undergoing a significant restructuring and transformation period with a trend of decreasing production, rising prices, and strong regional competition. Although traditional major producers in Southeast Asia (Thailand, Indonesia, and Vietnam) play a dominant role, the rise of Côte d'Ivoire, reducing demand from China, and price fluctuations are driving the adjustment of the rubber supply chain.

Southeast Asian countries are enhancing technology application and producing high-value products such as tires, gradually reducing raw material exports. African countries are taking their advantages in terms of resource and labour, becoming a key supplier of natural rubber. China is increasing domestic production to reduce dependence on imports.

Rising shipping costs due to the Red Sea crisis are giving West Africa a competitive advantage.

The U.S. investigation into anti-dumping practices for Southeast Asian tires could affect rubber demand.

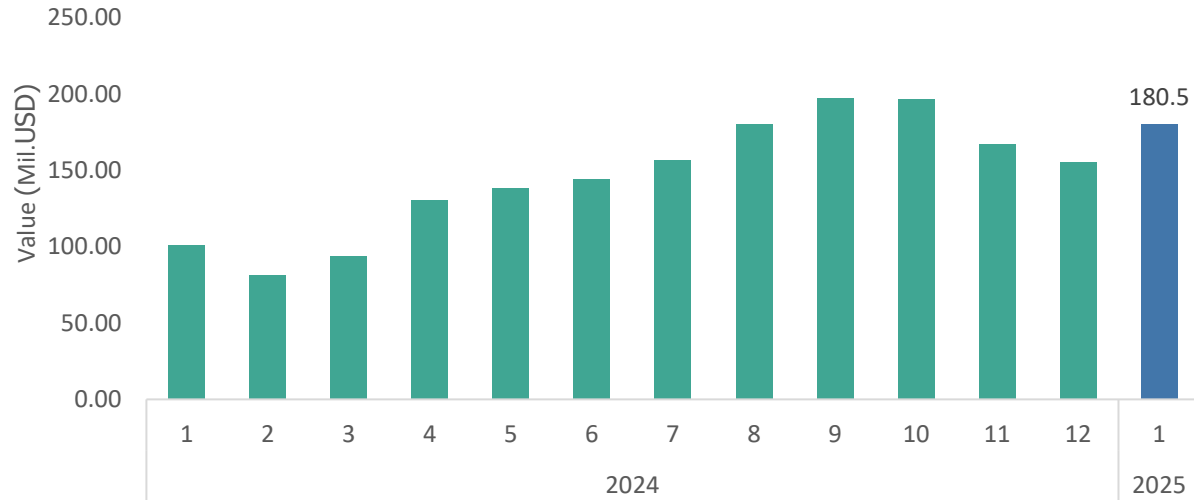






# FISHERIES

## Export volume and value to China, Jan-2025



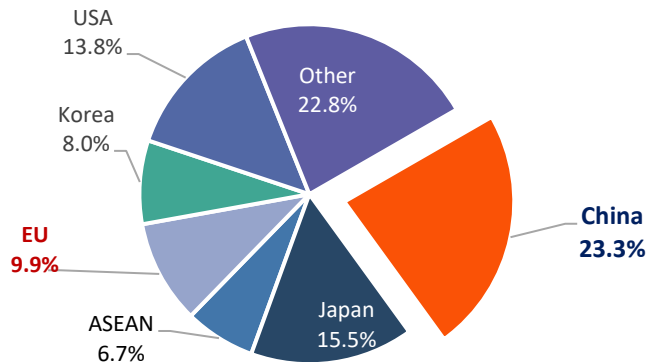
## Export results to China, Jan-2025

**VALUE**

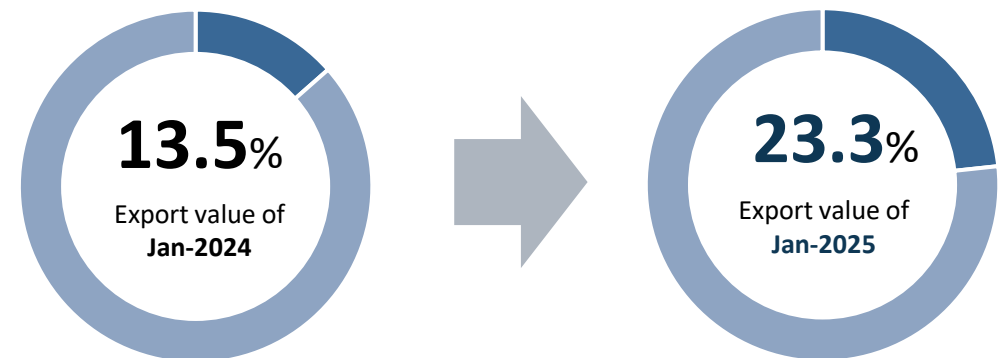
# 180.5 *mil. USD*

- ➔ Increases **16.0%** compared to Dec-2024
- ➔ Increases **78.9%** compared to Jan-2024
- ▲ **35.2** mil. USD more than the monthly average rate in 2024
- ❖ Accumulated 1 months of 2025 reaches **180.5** mil. USD, **10.4%** of total 2024

## Percentage of export value to China, Jan-2025



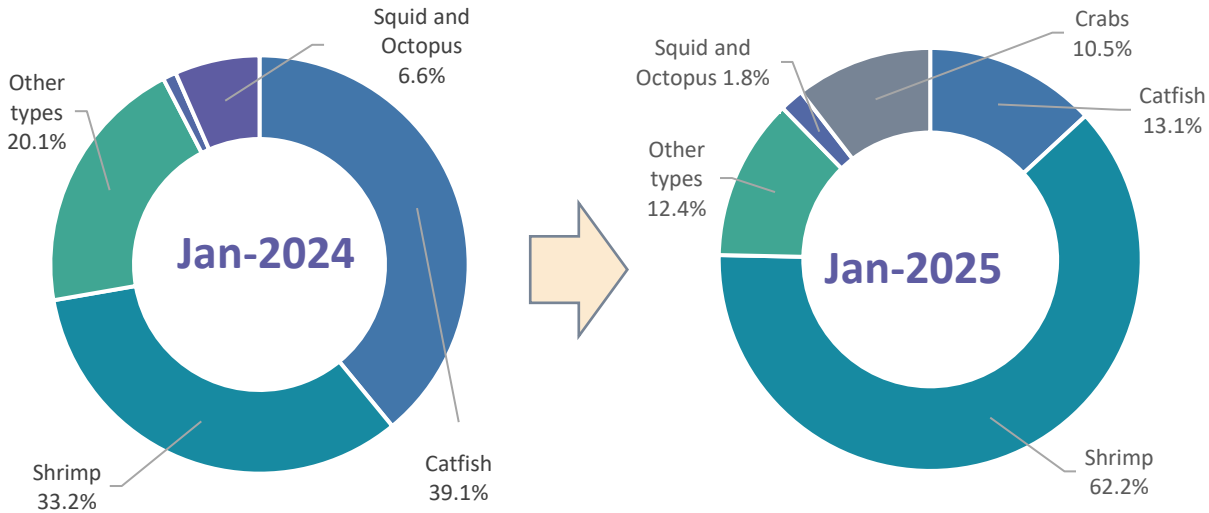
## Changes in percentage of export value to China, Jan-2025





# FISHERIES

## Structure of exports by products to China, Jan-2025



## Seafood exports to China, Jan-2025



### Catfish

Value: **23.7** mil. USD  
 Decreases **41.3%** compared to Dec-2024  
 Decreases **39.9%** compared to Jan-2024

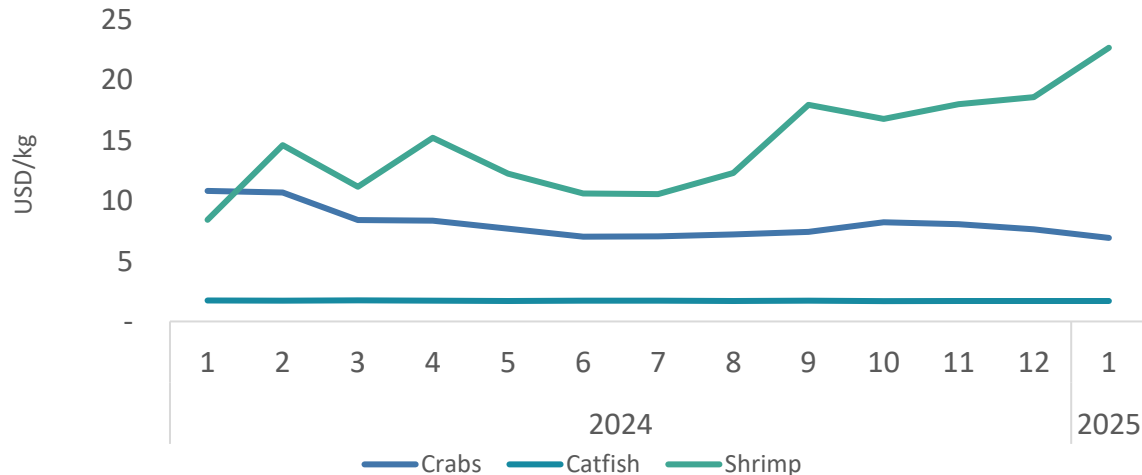
### Shrimp

Value: **112.3** mil. USD  
 Increases **51.4%** compared to Dec-2024  
 Increases **235.1%** compared to Jan-2024

### Crabs

Value: **18.9** mil. USD  
 Increases **82.6%** compared to Dec-2024  
 Increases **1706.4%** compared to Jan-2024

## Average export seafood price to China, Jan-2025



### Crabs

The average export price in Jan-2025 is **6.9** USD/kg; **decreases 9.4%** compared to the previous month; and **decreases 36.0%** compared to the same month of 2024.

### Catfish

The average export price in Jan-2025 is **1.7** USD/kg; **decreases 1.4%** compared to the previous month; and **decreases 2.2%** compared to the same month of 2024.

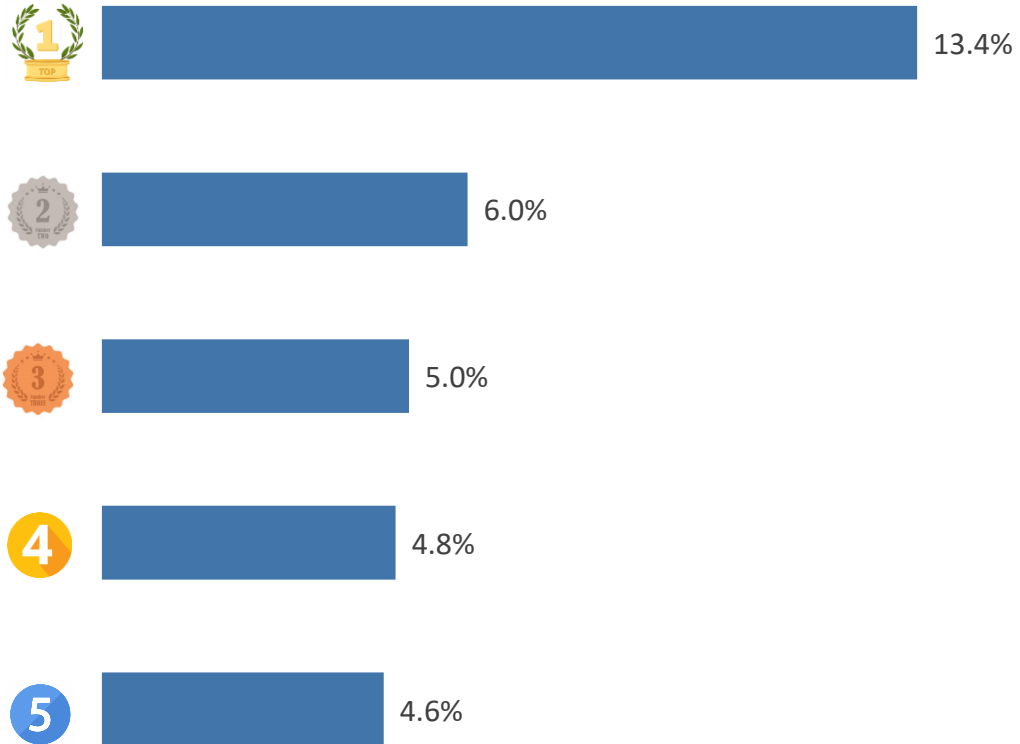
### Shrimp

The average export price in Jan-2025 is **22.7** USD/kg; **increases 21.9%** compared to the previous month; and **increases 169.3%** compared to the same month of 2023. (High average price due to large proportion of lobster)

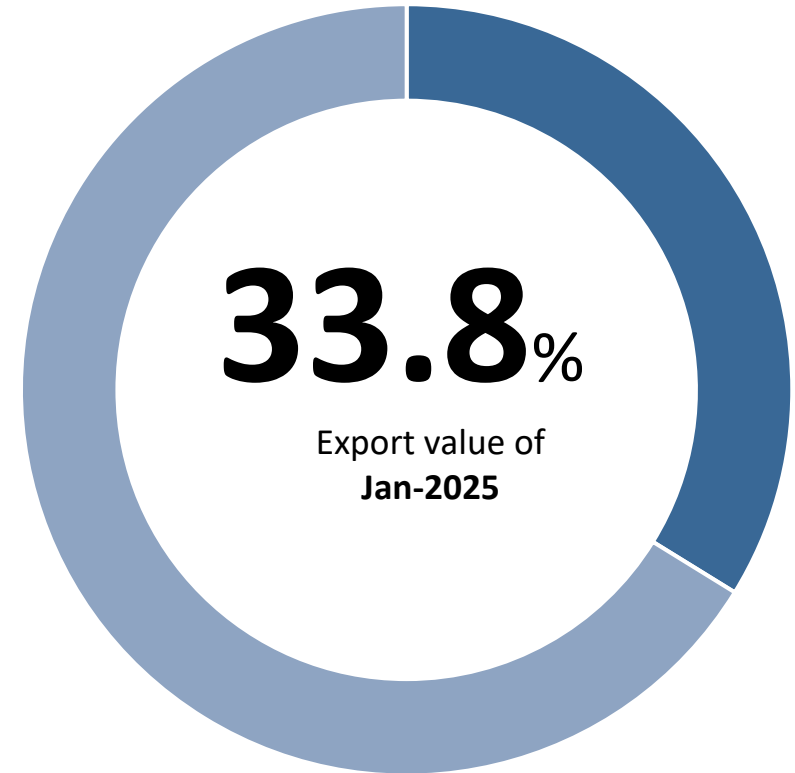


# FISHERIES

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



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



### China's Seafood Trade in 2024

In 2024, China promoted to export high-value seafood, boosting its trade surplus to \$1.3 billion, while domestic consumption and imports reduced. Seafood exports reached \$19.5 billion, marking a slight increase of 0.5% compared to the previous year, but export volume saw a significant increase of 12.4% to 4.08 million tons. Processed products such as seasoned tilapia and frozen squid made major contributions to this growth, with tilapia exports increasing by 19% in value and 10% in volume, benefiting from competitive pricing in Western markets.

Meanwhile, China's seafood import value and volume declined by 5.2% to \$18.2 billion, and by 3.6% to 4.5 million tons, respectively. Reducing domestic demand is the main reason of this trend although some premium products, such as live crabs and rock lobsters experienced a significant growth, rising by 13% and 39% in value, respectively. However, the average import prices of these products decreased, reflecting weaker purchasing power among high-end consumers.

China's shrimp market faced significant challenges during 2024; frozen shrimp imports dropped by 7% in volume and 15% in value to \$4.45 billion. It shows the weak domestic demand and high inventory.

Source: Ocean Treasure (Feb-2025)







# FRUITS & VEGETABLES (EXPORT)

## Export volume and value to China, Jan-2025



## Export results to China, Jan-2025

### VALUE



**174.1**

*mil. USD*

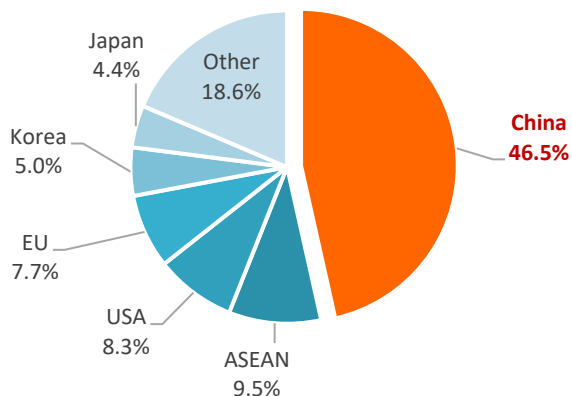
Decreases **41.6%** compared to Dec-2024

Decreases **43.1%** compared to Jan-2024

**211.9 mil. USD** less than the monthly average rate in 2024

Accumulated 1 months of 2025 reaches **174.1 mil. USD**, **3.8%** of total 2024

## Percentage of export value to China, Jan-2025



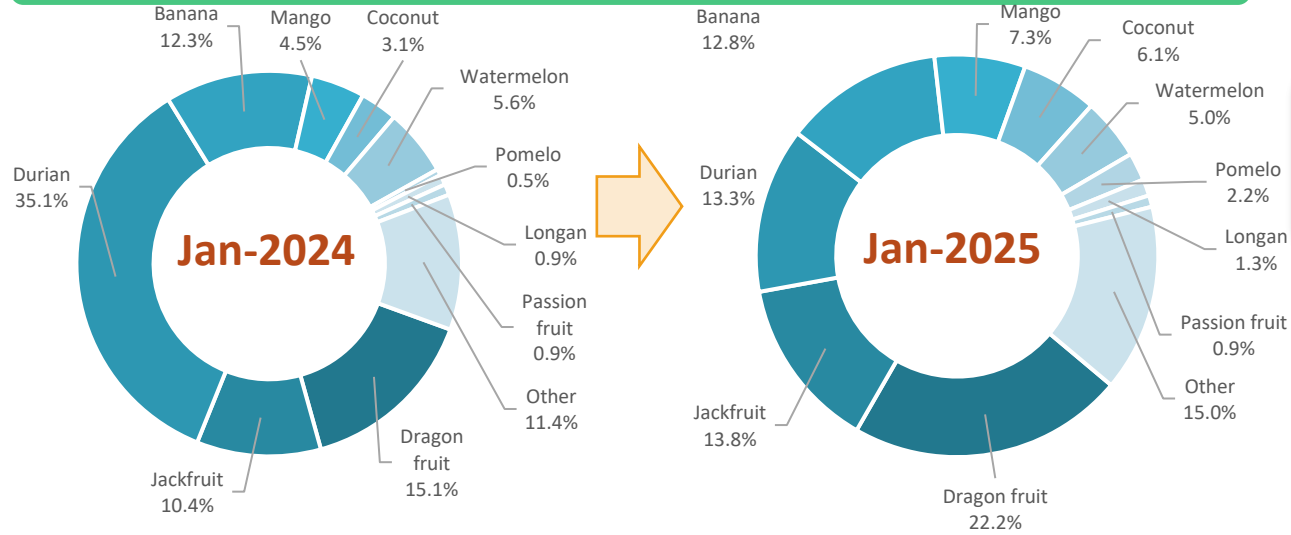
## Changes in percentage of export value to China, Jan-2025





# FRUITS & VEGETABLES (EXPORT)

## Structure of exports by products to China, Jan-2025



## Export results of some main products to China, Jan-2025



### Dragon fruit

Value: **38.7** mil. USD

Increases **55.7%** compared to Dec-2024

Decreases **16.5%** compared to Jan-2024



### Jackfruit

Value: **24.1** mil. USD

Decreases **54.5%** compared to Dec-2024

Decreases **24.6%** compared to Jan-2024



### Durian

Value: **23.1** mil. USD

Decreases **67.6%** compared to Dec-2024

Decreases **78.5%** compared to Jan-2024



### Banana

Value: **22.2** mil. USD

Decreases **10.1%** compared to Dec-2024

Decreases **41.1%** compared to Jan-2024



### Mango

Value: **12.7** mil. USD

Increases **42.9%** compared to Dec-2024

Decreases **8.0%** compared to Jan-2024



### Coconut

Value: **10.7** mil. USD

Decreases **12.5%** compared to Dec-2024

Increases **11.0%** compared to Jan-2024



### Watermelon

Value: **8.6** mil. USD

Decreases **70.6%** compared to Dec-2024

Decreases **50.0%** compared to Jan-2024



### Pomelo

Value: **3.9** mil. USD

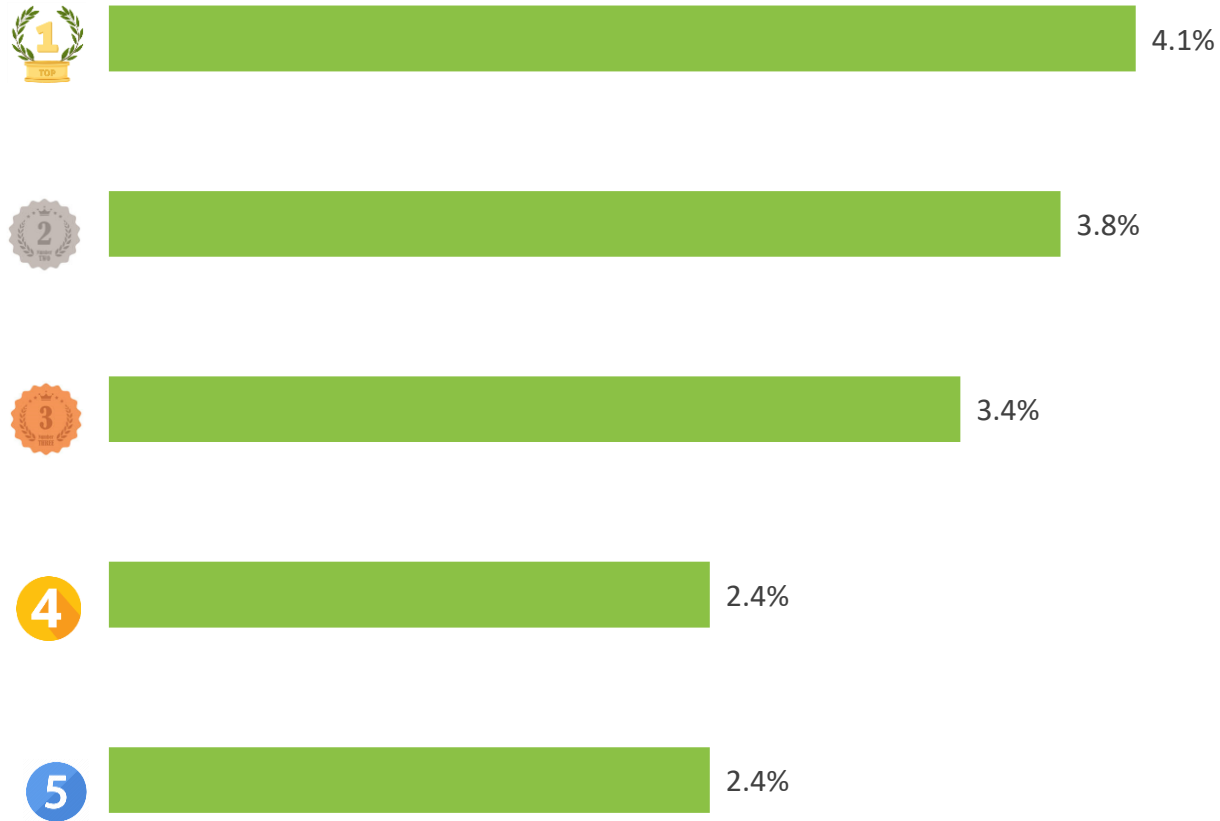
Increases **24.4%** compared to Dec-2024

Increases **138.8%** compared to Jan-2024

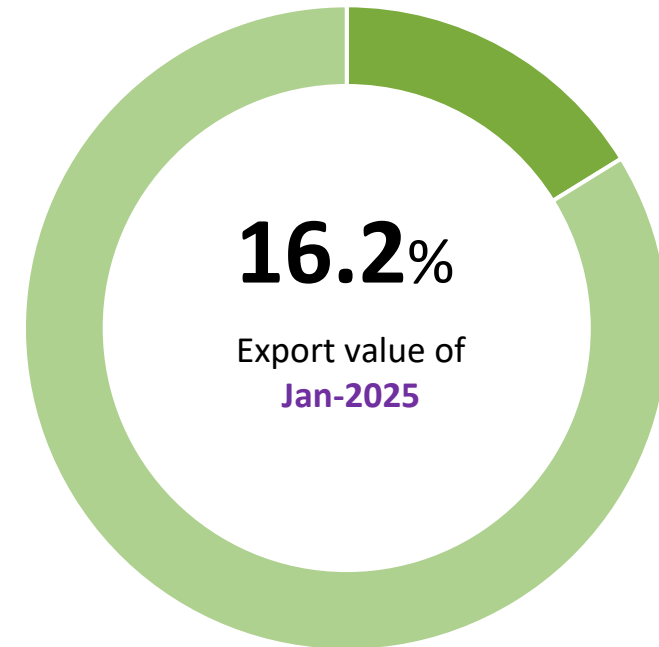


# FRUITS & VEGETABLES (EXPORT)

TOP 5 export enterprises by value to **China, Jan-2025**



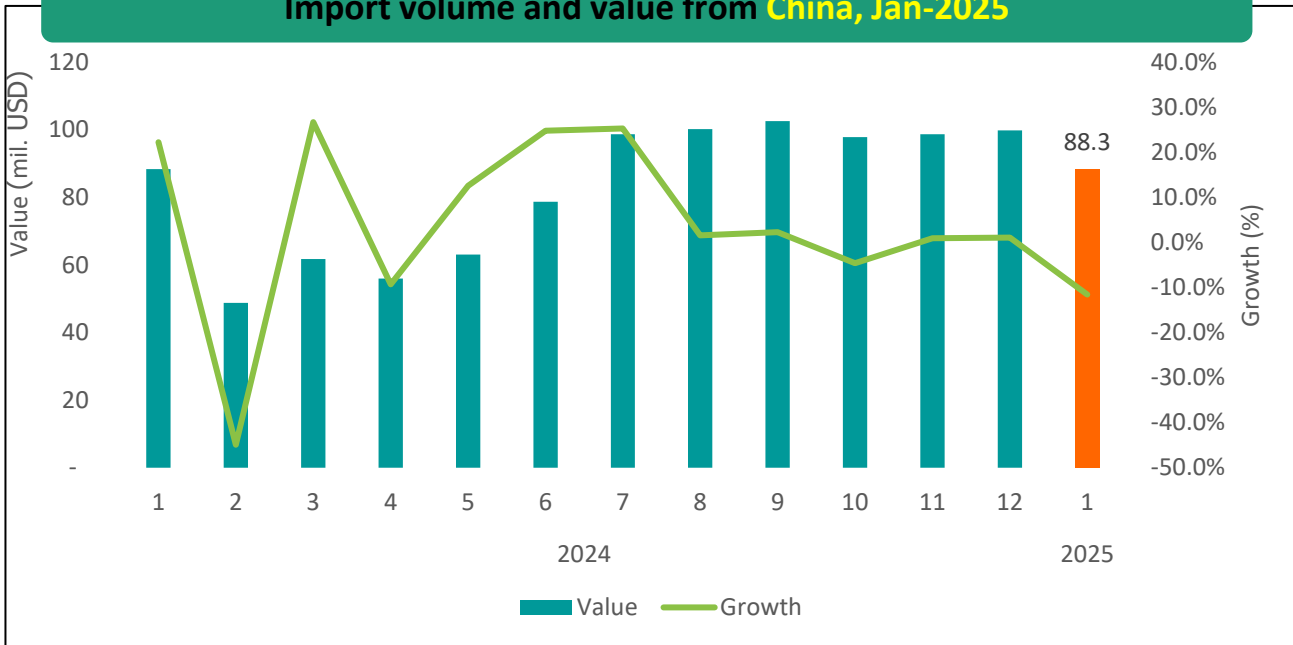
Value ratio of TOP 5 export enterprises to **China, Jan-2025**





# FRUITS & VEGETABLES (IMPORT)

## Import volume and value from China, Jan-2025



## Import results from China, Jan-2025

### VALUE



# 88.3

*mil. USD*

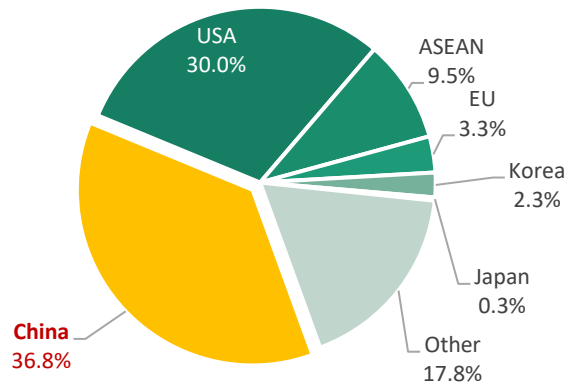
Decreases **11.6%** compared to Dec-2024

Decreases **0.1%** compared to Jan-2024

**5.5 mil. USD** more than the monthly average rate in 2024

Accumulated 1 months of 2025 reaches **88.3 mil. USD**, **8.9%** of total 2024

## Percentage of import value from China, Jan-2025



## Changes in percentage of import value from China, Jan-2025

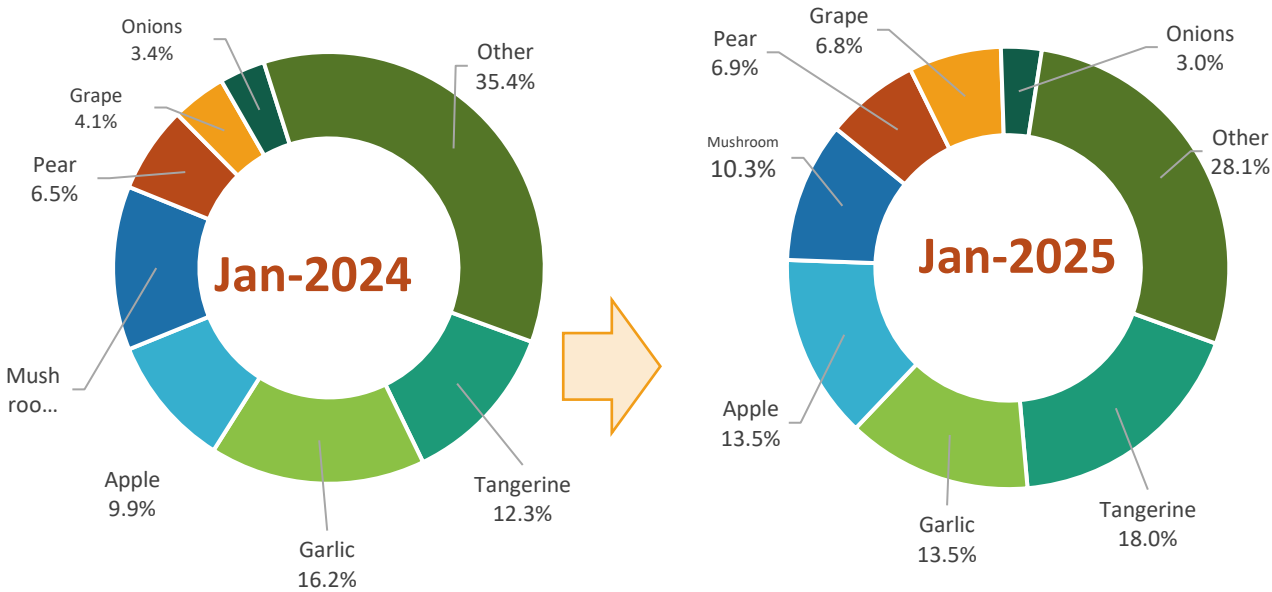






# FRUITS & VEGETABLES (IMPORT)

## Structure of imports by products from China, Jan-2025



## Import results of some main products from China, Jan-2025



### Tangerine

Value: **15.9** mil. USD

Increases **69.0%** compared to Dec-2024

Increases **46.9%** compared to Jan-2024



### Garlic

Value: **11.9** mil. USD

Increases **7.6%** compared to Dec-2024

Decreases **16.6%** compared to Jan-2024



### Apple

Value: **11.9** mil. USD

Decreases **11.1%** compared to Dec-2024

Increases **36.3%** compared to Jan-2024



### Mushroom

Value: **9.1** mil. USD

Decreases **7.6%** compared to Dec-2024

Decreases **16.6%** compared to Jan-2024



### Pear

Value: **6.1** mil. USD

Increases **50.7%** compared to Dec-2024

Increases **6.2%** compared to Jan-2024



### Grape

Value: **6.0** mil. USD

Decreases **21.9%** compared to Dec-2024

Increases **64.9%** compared to Jan-2024



### Onions

Value: **2.6** mil. USD

Decreases **47.3%** compared to Dec-2024

Decreases **13.3%** compared to Jan-2024



### **China's Banana Imports Decline for the Third Consecutive Year**

In 2024, China's banana imports reached 1.687 million tons, a 4.6% decrease from 2023 and the lowest level in the past four years. The primary reasons is the expansion of domestic banana cultivation and instability in overseas supply. Advances in farming techniques have enabled certain regions in China to increase plantation areas, boosting domestic production and reducing reliance on imports. China's banana imports in 2025 will be about 1.6 and 1.7 million tons, continuing the downward trend.

*Source: Gappingworld.com*

### **China's Cherry Imports Increase by 2.3% in 2024**

The import value of cherry reached \$2.6 billion in 2024, marking a 2.3% increase compared to the previous year. China has been the largest market for Chilean cherries in the past seven years, importing over 90% of Chile's cherry production. The reduction in China's import tariffs has made prices become more competitive, benefiting both domestic consumers and exporters.

*Source: Freshplaza.com*



### **Sharp decline in fruit and vegetable export to China**

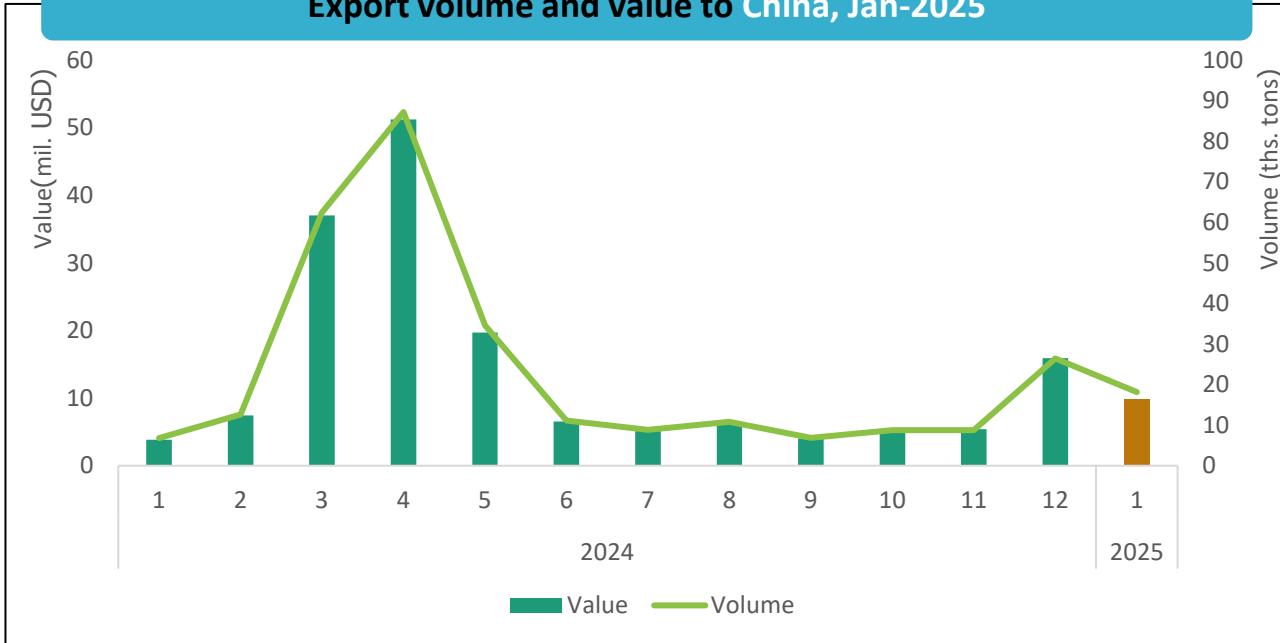
Fruit and vegetable exports from Viet Nam to China have declined since early 2025 because China tightened import quality inspections. All shipments of imported durians to China must undergo residue analysis for Cadmium and Auramine O, conducted in laboratories recognized by Chinese authorities. These regulations have been applied for all import products.

The quality inspections for 100% shipments and Cadmium and Auramine O analysis lead to stagnant situation in exporting durian to China. Many businesses have temporarily suspended exports to complete the necessary procedures.



# RICE

## Export volume and value to China, Jan-2025



## Export results to China, Jan-2025

**VALUE**  
**9.8** mil. USD



↓ Decreases **38.5%** compared to Dec-2024

↑ Increases **153.1%** compared to Jan-2024

↓ **4.2 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **9.8 mil. USD, 5.8%** of total 2024

**VOLUME**  
**18.1** ths. tons



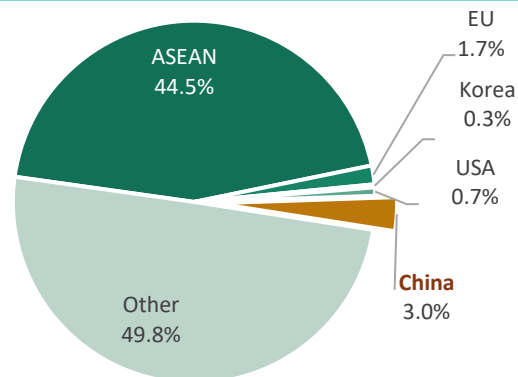
↓ Decreases **31.4%** compared to Dec-2024

↑ Increases **166.3%** compared to Jan-2024

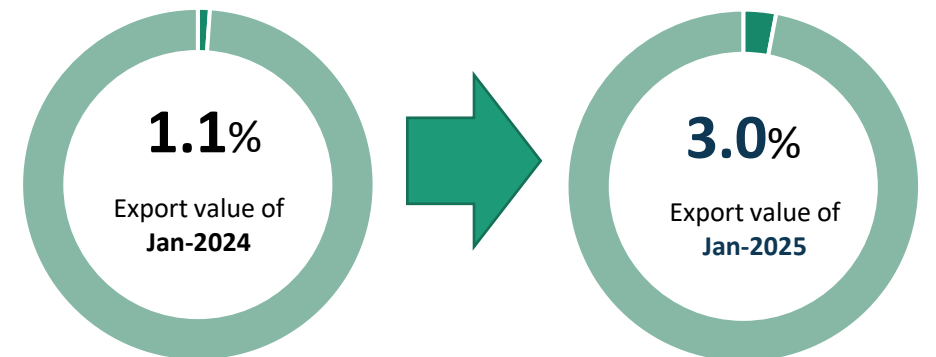
↓ **5.7 ths. tons** less than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **18.1 ths. tons, 6.4%** of total 2024

## Percentage of export value to China, Jan-2025



## Changes in percentage of export value to China, Jan-2025

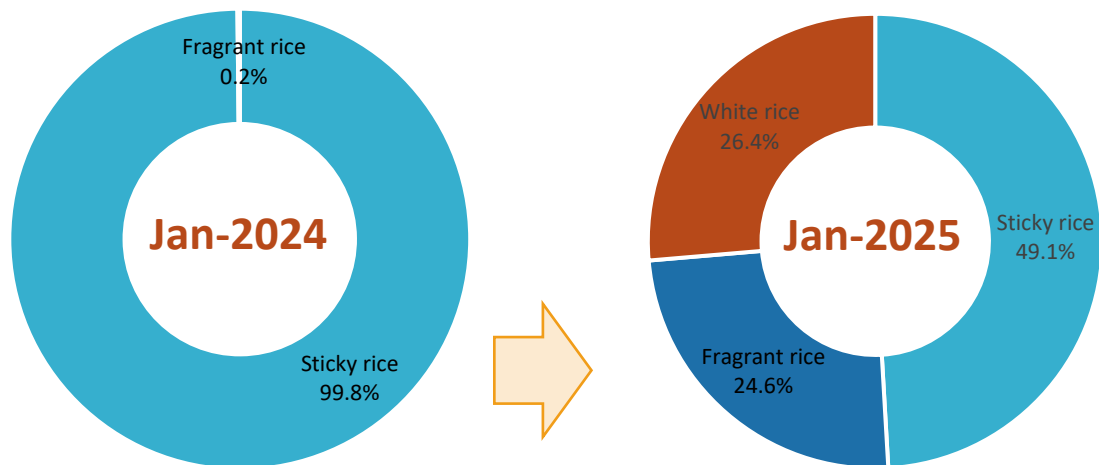




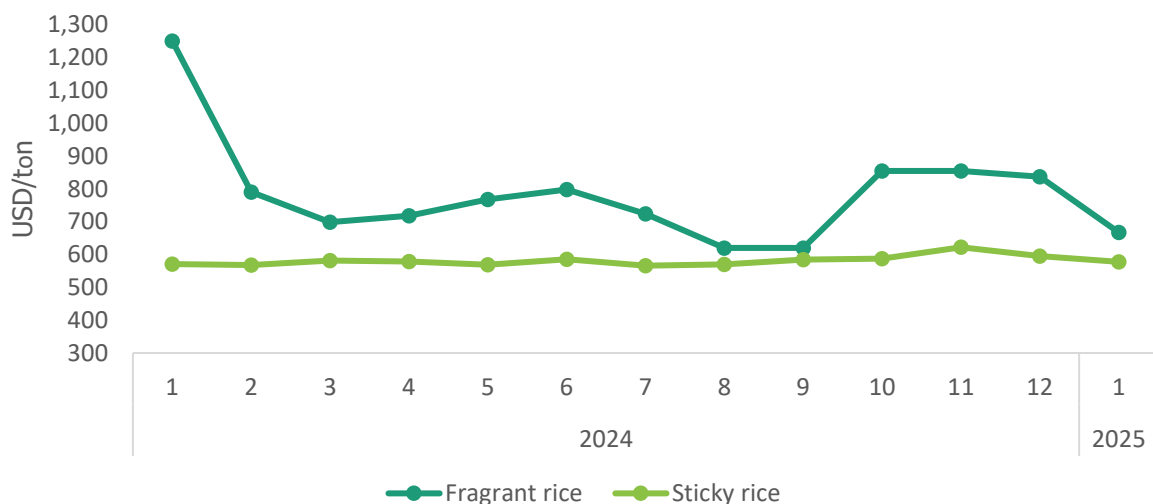


# RICE

## Structure of exports by products to China, Jan-2025



## Average export rice price to China, Jan-2025



## Export results to China, Jan-2025



### Sticky rice

Value: **4.8** mil. USD

Decreases **68%** compared to Dec-2024

Increases **24%** compared to Jan-2024



### Fragrant rice

Value: **2.4** mil. USD

**2.1 times** more compared to Dec-2024

Gấp **384 lần** compared to Jan-2024



### White rice

Value: **2.6** mil. USD

**31 times** more compared to Dec-2024

Increases **N/A** compared to Jan-2024

### Sticky rice

The average export price in Jan-2025 is **577 USD/ton**; **decreases 3%** compared to the previous month; and **increases 1%** compared to the same month of 2024.

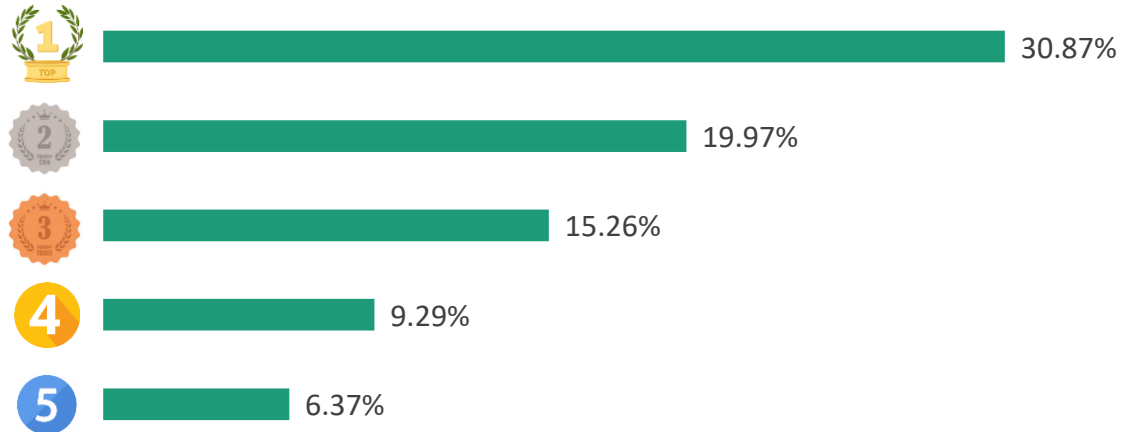
### Fragrant rice

The average export price in Jan-2025 is **667 USD/ton**; **decreases 20%** compared to the previous month; and **decreases 47%** compared to the same month of 2024.

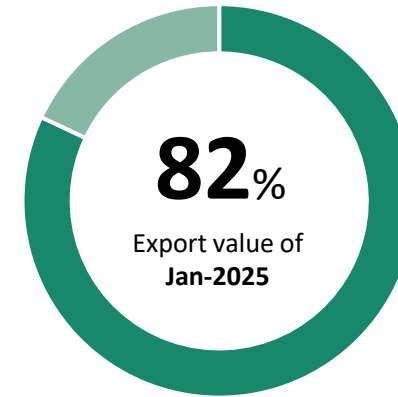


# RICE

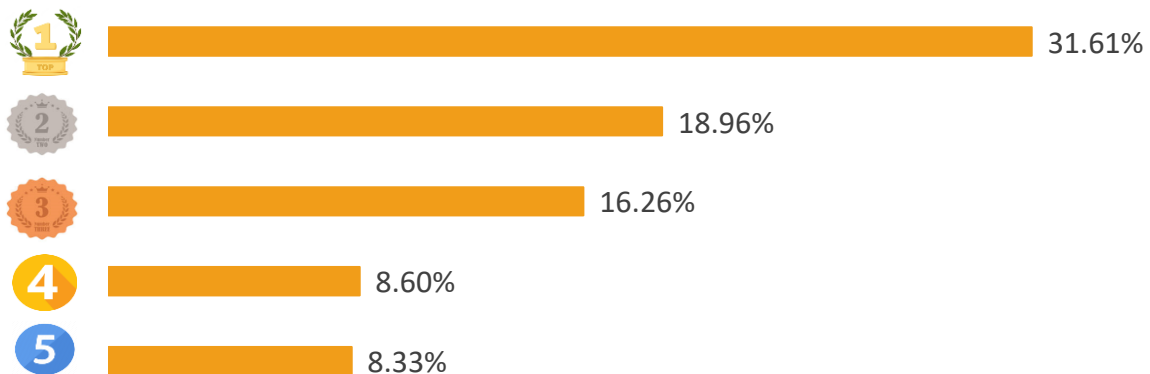
## TOP 5 export enterprises by value to China, Jan-2025



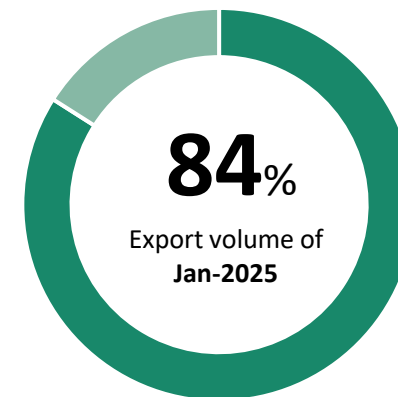
## Value ratio of TOP 5 export enterprises to China, Jan-2025



## TOP 5 export enterprises by volume to China, Jan-2025



## Volume ratio of TOP 5 export enterprises to China, Jan-2025





# RICE

## SPOTLIGHTS

According to the February 2025 Rice Outlook Report by the U.S. Department of Agriculture (USDA), China imported only 1.6 million tons of rice in 2024, a decrease of 1 million tons from the previous year and the lowest level in 14 years. After India open its rice export, Asian rice prices plummeted and be lower than China's domestic rice prices (about \$150–\$160 per ton). This price gap is expected to provide incentive for Chinese importers coming back to the market. The USDA forecasts that China's rice imports will reach approximately 2.2 million tons in 2025, Thailand and Vietnam being the country's primary suppliers.

Source: Thanhnien.vn





# WOOD & WOODEN PRODUCTS

## Export volume and value to China, Jan-2025



## Export results to China, Jan-2025

VALUE



139

mil. USD

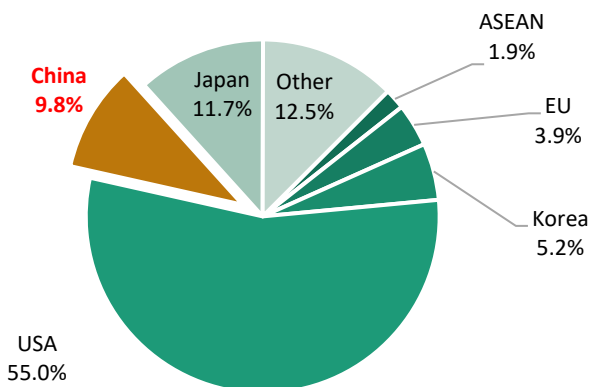
↑ Increases **1.6%** compared to Dec-2024

↓ Decreases **18.4%** compared to Jan-2024

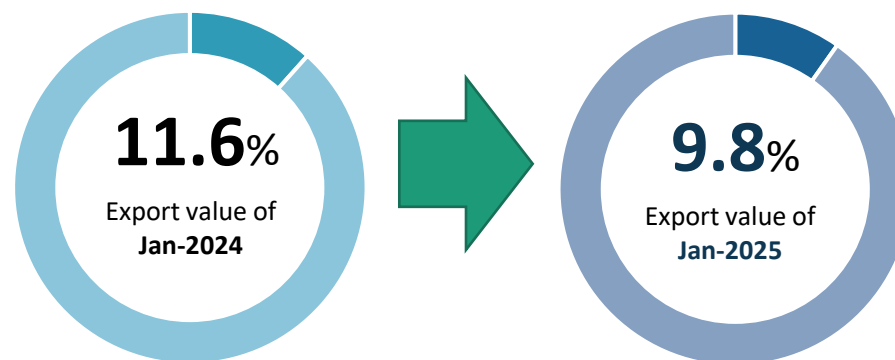
↓ **29.01 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **139.1 mil. USD**, **6.9%** of total 2024

## Percentage of export value to China, Jan-2025



## Changes in percentage of export value to China, Jan-2025







# WOOD & WOODEN PRODUCTS

## Structure of exports by products to China, Jan-2025



## Export results to China, Jan-2025



### Wood chips

Value: **130.8** mil. USD

Increases **11%** compared to Dec-2024

Decreases **9%** compared to Jan-2024



### Wood slabs

Value: **8.1** mil. USD

Decreases **53%** compared to Dec-2024

Decreases **17%** compared to Jan-2024



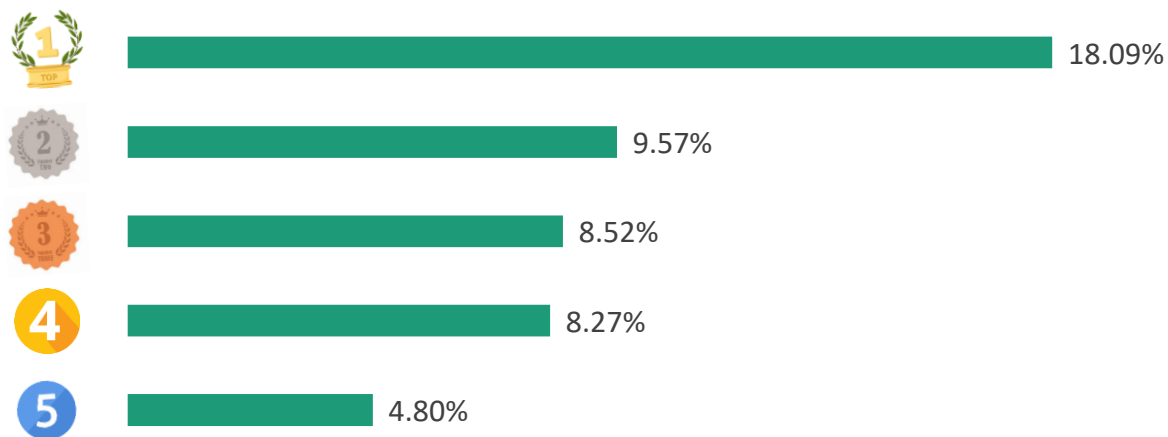
### Timber

Value: **5.9** mil. USD

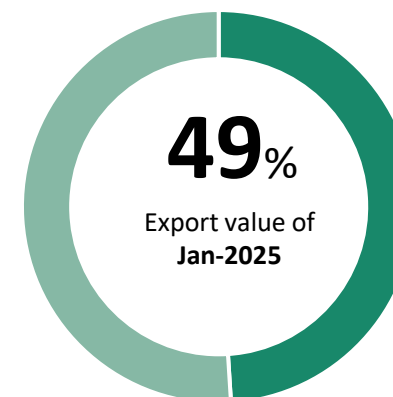
Decreases **49%** compared to Dec-2024

Decreases **81%** compared to Jan-2024

## TOP 5 export enterprises by value to China, Jan-2025



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





## SPOTLIGHTS

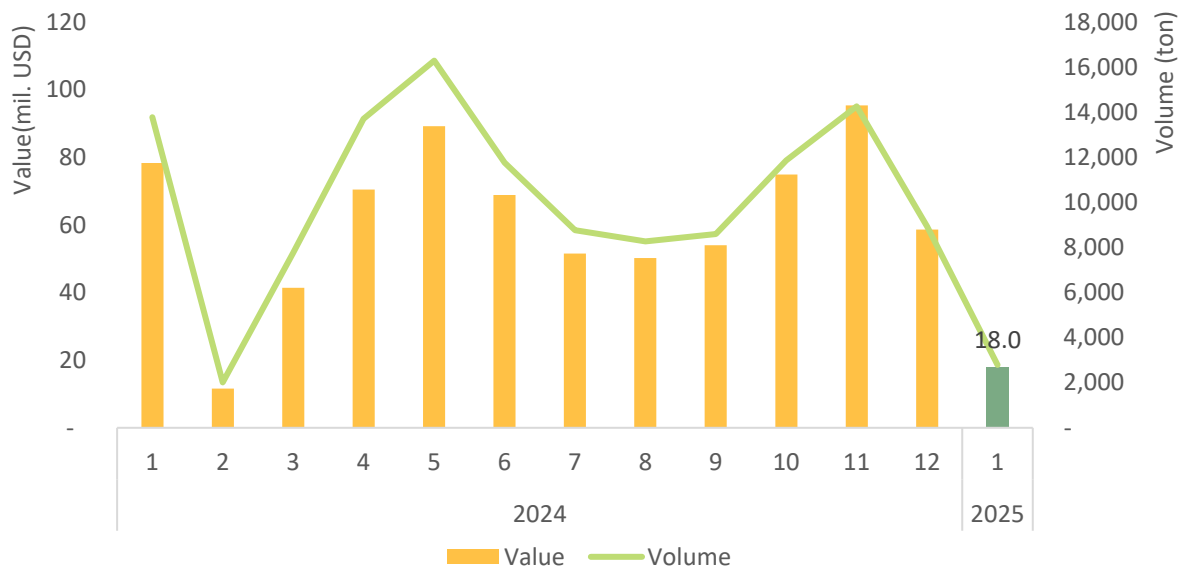
In 2024, China's log imports reached 36.1 million cubic meters, with a total value of \$6.159 billion, representing a 5% decrease in volume and a 4% decline in value compared to the previous year. Softwood log imports fell 7% to 26.12 million cubic meters, accounting for 72% of total imports. Hardwood log imports increased 1% to 9.98 million cubic meters. The average price of imported softwood logs dropped 3%, while hardwood log prices rose 5% compared to 2023.

New Zealand remained China's largest log supplier in 2024, accounting for 50% of total imports. However, imports from New Zealand declined 1% compared to 2023. Imports from the United States, Japan, the Solomon Islands, and Canada increased by 7% to 22%, while imports from Germany, Papua New Guinea, and Russia saw significant declines.



# CASHEW NUTS

## Export value and volume to China, Jan-2025



## Export results to China, Jan-2025

### VALUE

**18.01** mil. USD

Decreases **69.3%** compared to Dec-2024

Decreases **77%** compared to Jan-2024

↓ **44 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **18 mil.USD, 2%** of total 2024

### VOLUME

**2.789** tấn

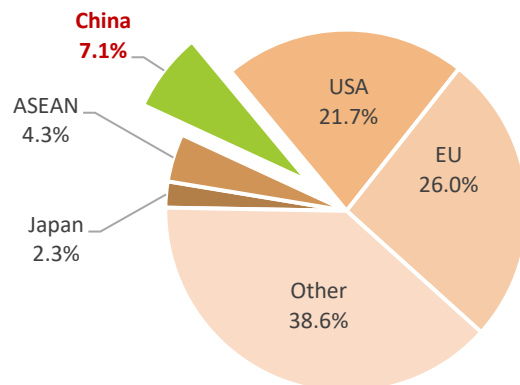
Decreases **68.8%** compared to Dec-2024

Decreases **80%** compared to Jan-2024

↓ **7.7 ths. tons** less than the monthly average rate in 2024

❖ Accumulated 1 months of 2025 reaches **2.8 ths. tons . 2%** of total 2024

## Changes in percentage of export value to China, Jan-2025



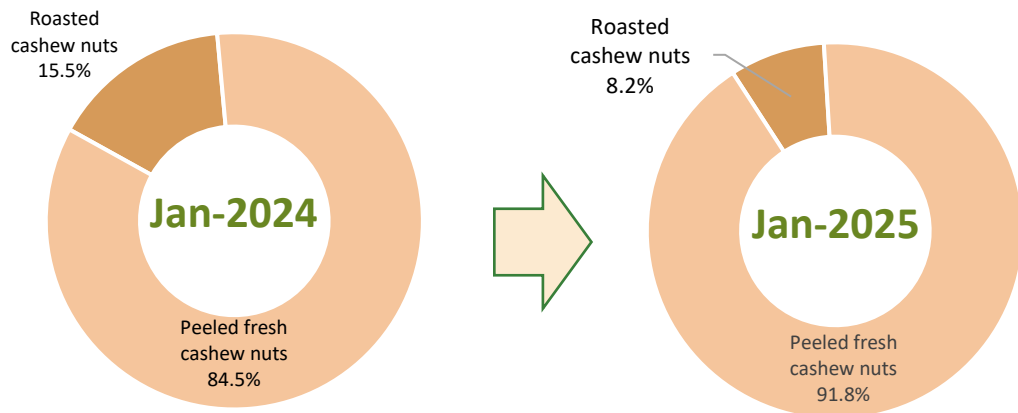
## Changes in percentage of export value to China. Nov-2023





# CASHEW NUTS

## Structure of exports by products to China, Jan-2025



## Export results to China, Jan-2025



### Peeled fresh cashew nuts

Value: **16.5** mil. USD

Decreases **69%** compared to Dec-2024

Decreases **75%** compared to Jan-2024



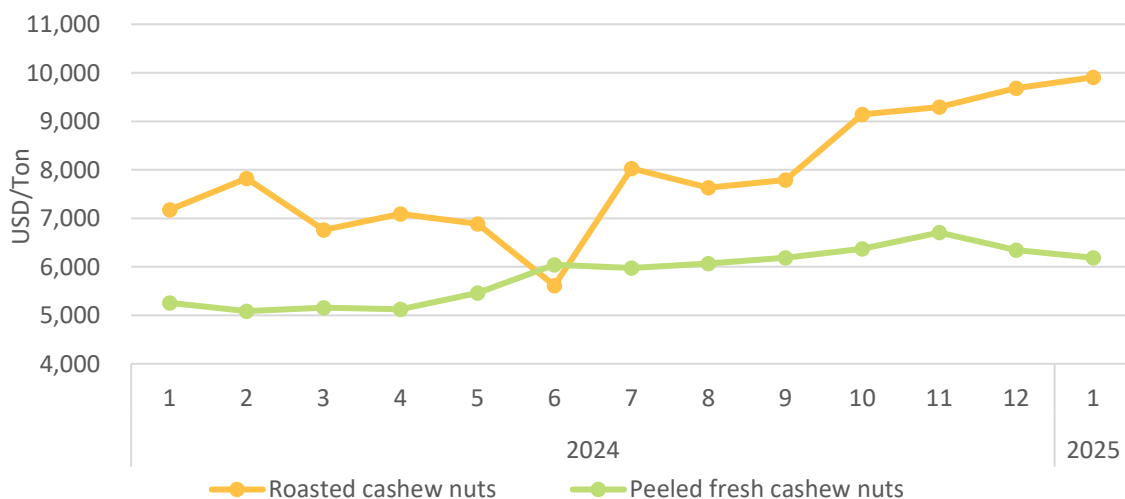
### Roasted cashew nuts

Value: **1.5** mil. USD

Decreases **72%** compared to Dec-2024

Decreases **88%** compared to Jan-2024

## Average export cashew nuts price to China, Jan-2025



### Peeled fresh cashew nuts

The average export price in Jan-2025 is **6,190** USD/ton; **decreases 2.4%** compared to the previous month; and **increases 17.8%** compared to the same month of 2024.

### Roasted cashew nuts

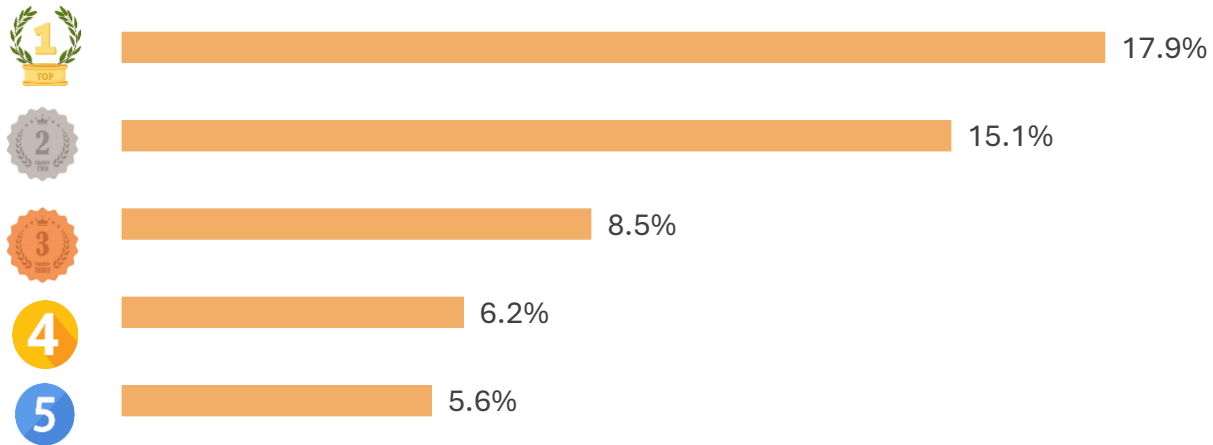
The average export price in Jan-2025 is **9,908** USD/ton; **increases 2.4%** compared to the previous month; and **increases 38.1%** compared to the same month of 2024.



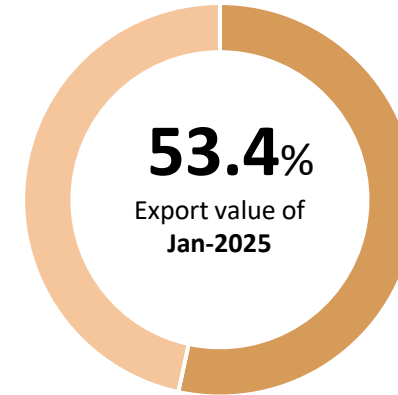


# CASHEW NUTS

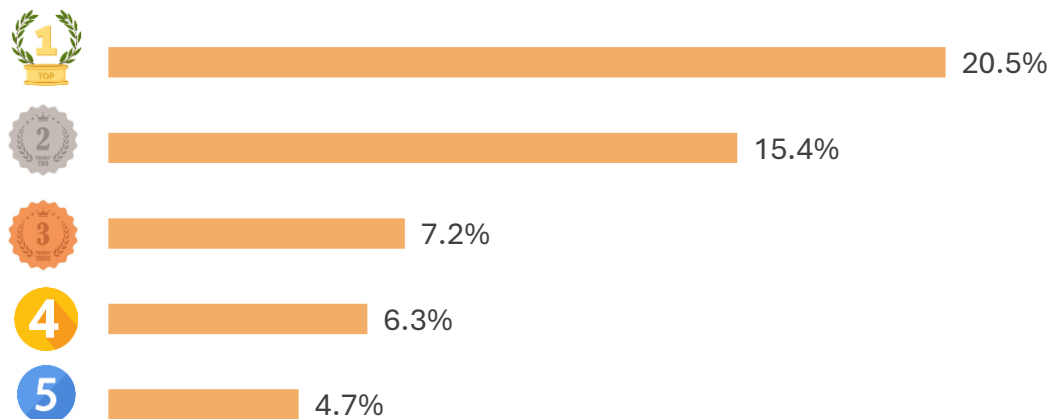
## TOP 5 export enterprises by value to China, Jan-2025



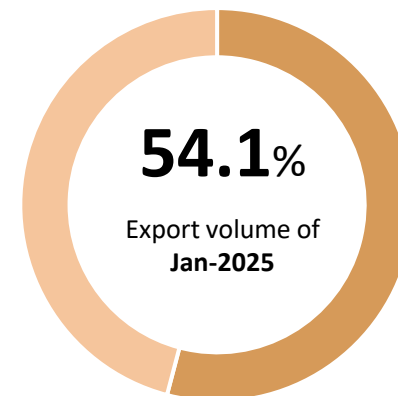
## Value ratio of TOP 5 export enterprises to China, Jan-2025



## TOP 5 export enterprises by volume to China, Jan-2025



## Volume ratio of TOP 5 export enterprises to China, Jan-2025



# CASHEW NUTS

## SPOTLIGHTS



Cambodia is calling for more Chinese investment in agriculture, agro-processing industries, and solar energy. According to the Council for the Development of Cambodia (CDC), the cashew processing industry is a high-potential sector that is emphasized during a meeting with a business delegation from Zhejiang Province, China.

In 2024, Cambodia produced 850,000 tons of raw cashew nuts, of which 815,000 tons (95.8%) were exported without processing, generating \$1.15 billion in revenue.

Additionally, Cambodia is encouraging investment in the manufacturing of solar-powered lamps and batteries for transportation vehicles. Currently, China remains the largest foreign investor in Cambodia.

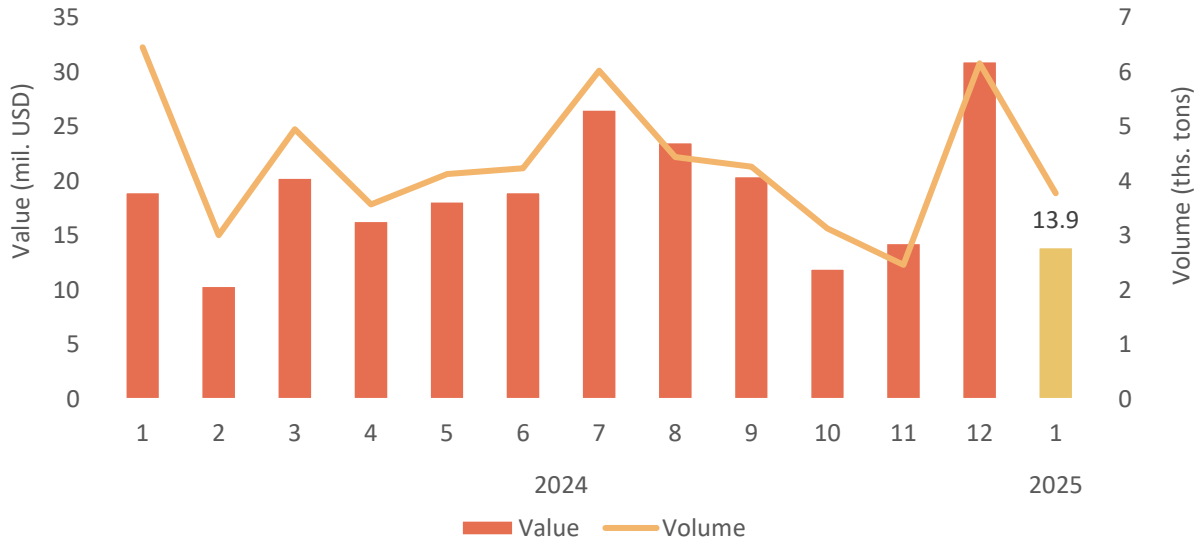
*Source: Khmertimeskh.com*





# COFFEE

## Export volume and value to China, Jan-2025



## Export results to China, Jan-2025

### VALUE

**13.9** mil. USD

⚡ Decreases **55.1%** compared to Dec-2024

⚡ Decreases **26.6%** compared to Jan-2024

⚡ **5.3 mil. USD** less than the monthly average rate in 2024.

❖ Accumulated 1 months of 2025 reaches **13.9** mil.USD, **6%** of total 2024.

### VOLUME

**3.8** ths. tons

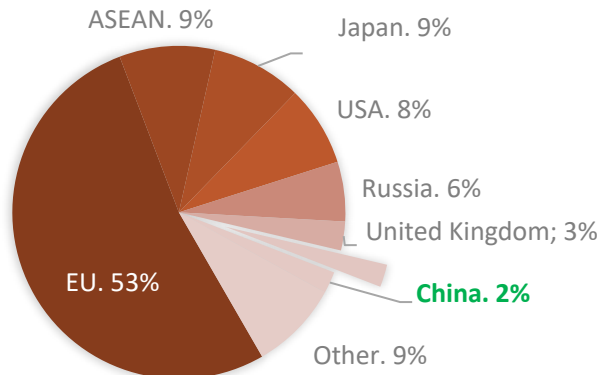
⚡ Decreases **38.7%** compared to Dec-2024

⚡ Decreases **41.5%** compared to Jan-2024

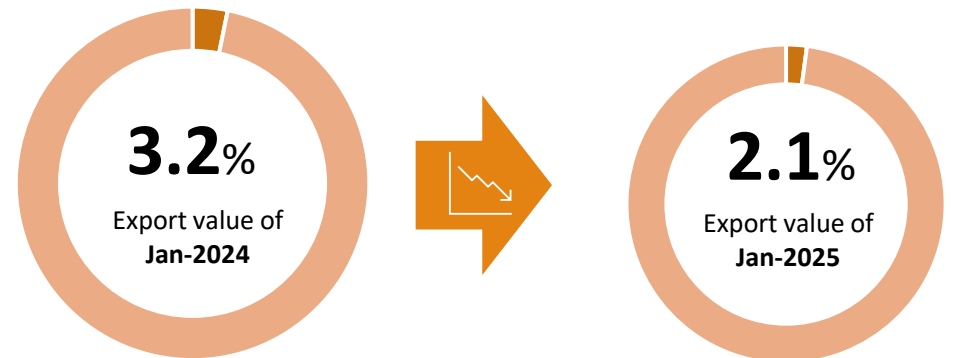
⚡ **0.6 ths. tons** less than the monthly average rate in 2024.

❖ Accumulated 1 months of 2025 reaches **3.8** ths. Tons, **7.1%** of total 2024.

## Percentage of export value to China, Jan-2025



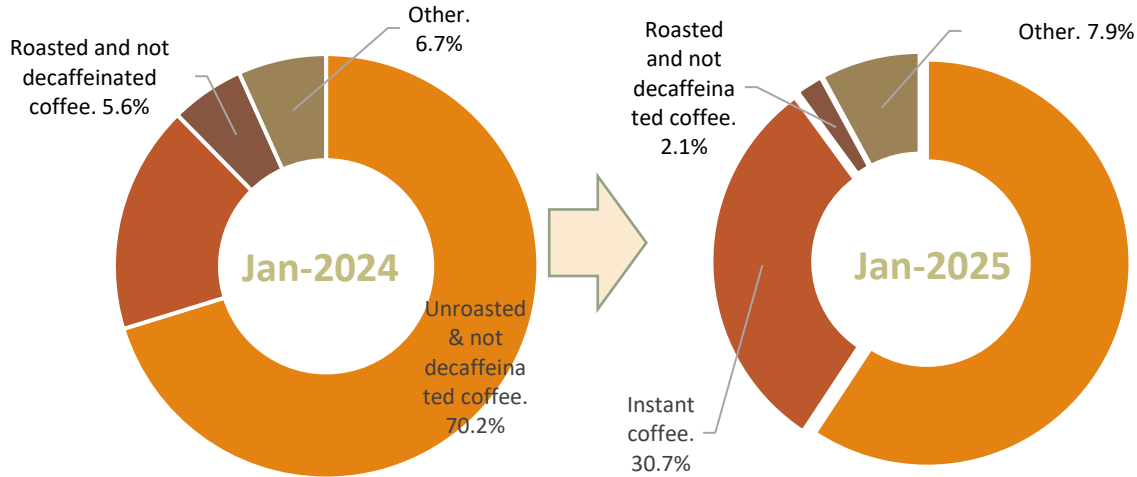
## Changes in percentage of export value to China, Jan-2025



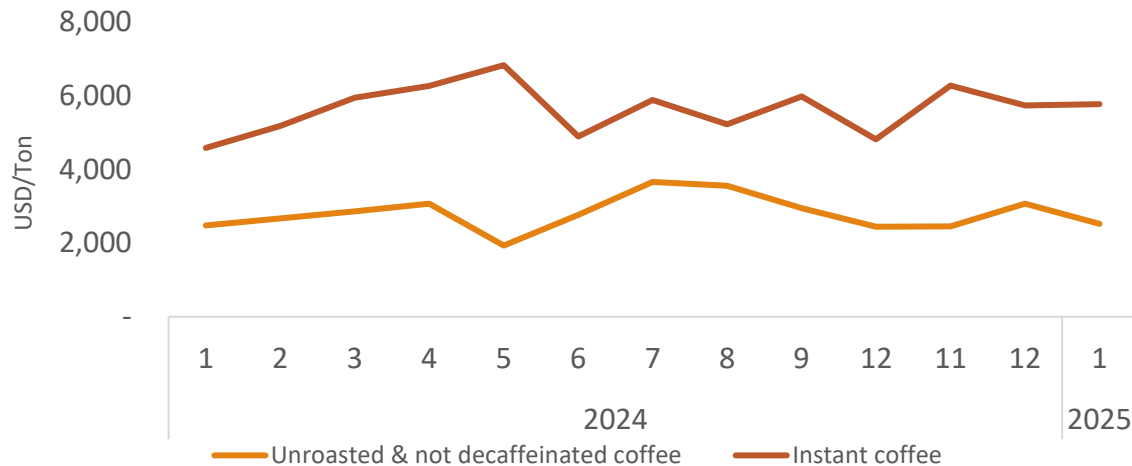


# COFFEE

## Structure of exports by products to China, Jan-2025



## Average export price to China, Jan-2025



## Export results to China, Jan-2025



### Unroasted & not decaffeinated coffee

Value: **8.5** mil. USD  
 Increases **39%** compared to Dec-2024  
 Decreases **31.5%** compared to Jan-2024

### Instant coffee

Value: **4.4** mil. USD  
 Decreases **81.6%** compared to Dec-2024  
 Increases **43%** compared to Jan-2024

### Roasted and not decaffeinated coffee

Value: **0.3** mil. USD  
 Decreases **43%** so compared to Dec-2024  
 Decreases **69.2%** compared to Jan-2024

### Instant coffee

The average export price in Jan-2025 is **5,774** USD/ton. **increases 0.6%** compared to the previous month; and **increases 26%** compared to the same month of 2024.

### Unroasted & not decaffeinated coffee

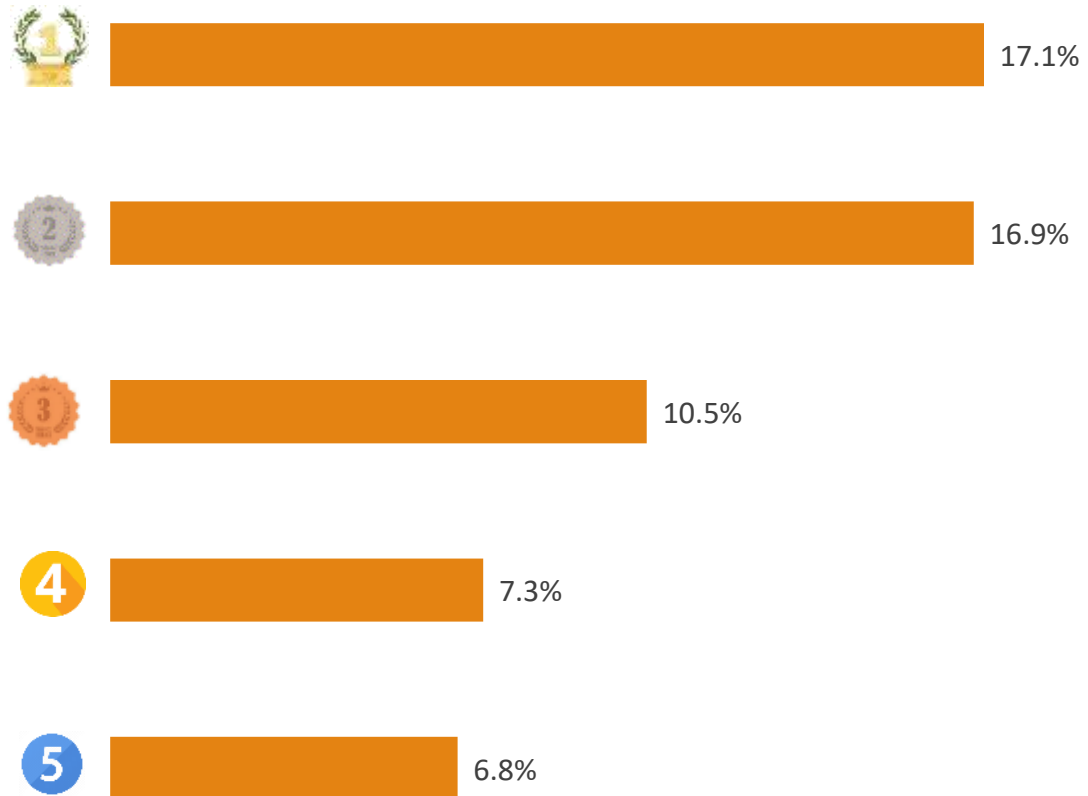
The average export price in Jan-2025 is **2,521** USD/ton. **increases 25.4%** compared to the previous month; and **increases 1.7%** compared to the same month of 2024.



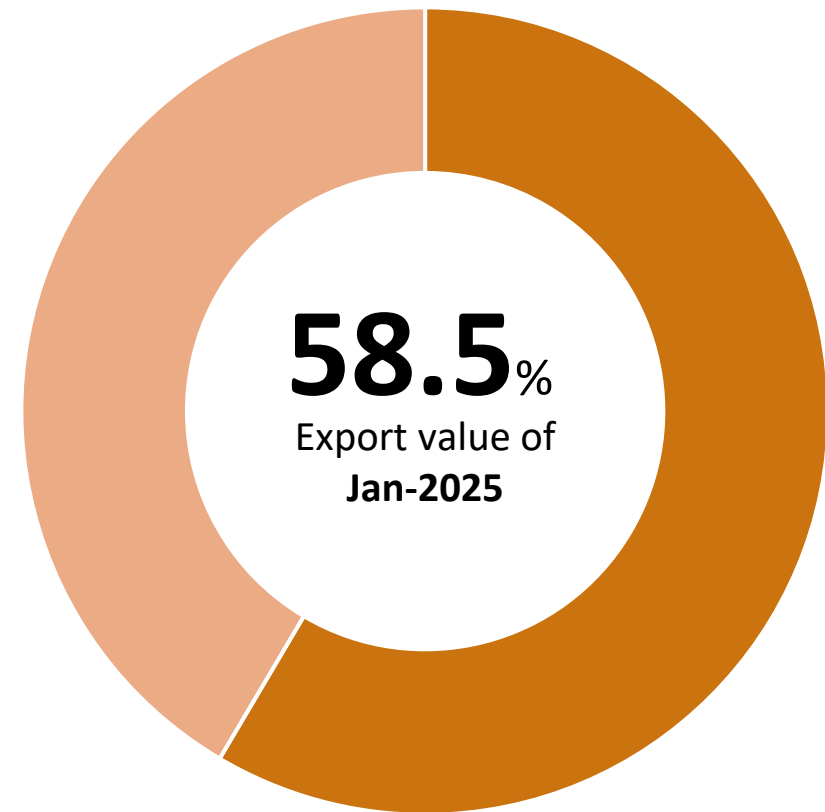


# COFFEE

## TOP 5 export enterprises by value to China, Jan-2025



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





# COFFEE

## SPOTLIGHTS



During the 2023-2024 period, China consumed approximately 5.8 million 60-kg bags of coffee, while domestic production was about 1.8 million bags. Consumption is projected to increase to 6.3 million bags in the 2024/25 season.

In the market, instant coffee remains dominant, but brewed coffee has been rapidly growing, accounting for over 40% of the total market share in 2023. Over the past decade, coffee shops have proliferated across China, of which Luckin Coffee holding the largest number of stores as of 2024.

Coffee is becoming increasingly popular, especially among young consumers. The 25-44 age consumer group represents the highest consumption rate. More than half of Chinese coffee drinkers maintain a habit of consuming at least three cups per week, indicating a high level of engagement with the product.

*Source: Statista*





# COFFEE

## SPOTLIGHTS



According to China's General Administration of Customs, Yunnan Province exported 32,500 tons of coffee in 2024, marking a 358% increase compared to the same period last year. Yunnan coffee has been exported to 29 countries and regions, with the Netherlands, Germany, the United States, and Vietnam being the main export destinations.

According to the Yunnan Provincial Department of Agriculture and Rural Affairs, in 2023, the province has approximately 80,000 hectares of coffee plantations, producing 146,000 tons of raw coffee beans. Yunnan is the largest coffee-producing region in China, accounting for 98% of the country's total production.

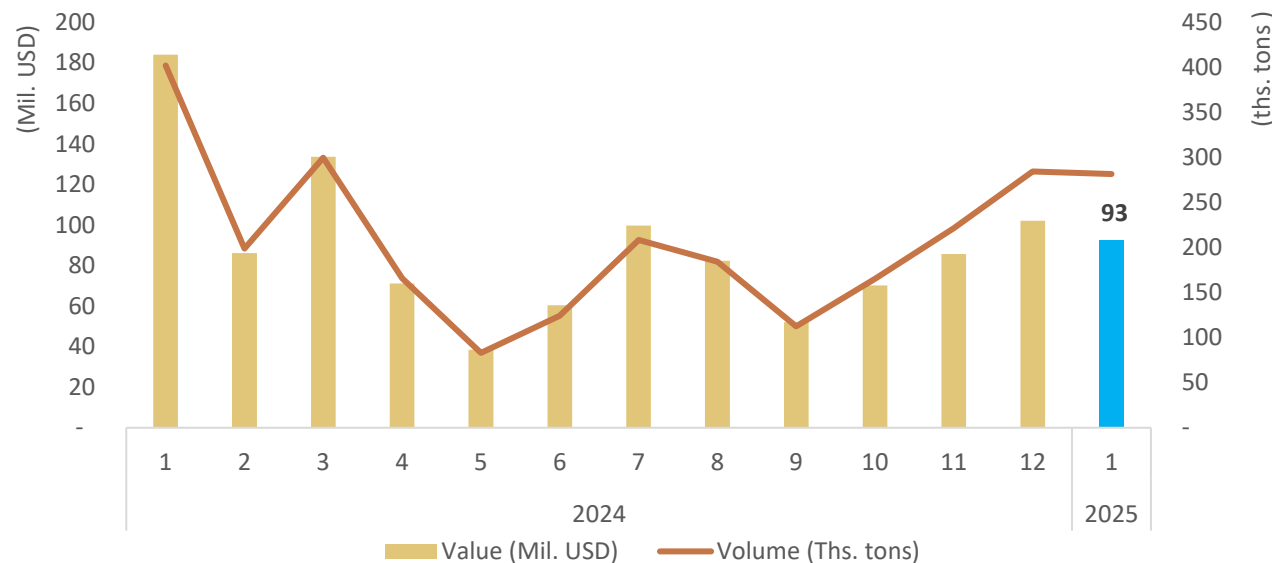
*Source: <http://english.scio.gov.cn>*





# CASSAVA & CASSAVA PRODUCTS

## Structure of export value by products to China, Jan-2025



## Export results to China, Jan-2025

VALUE

92.7

mil. USD

- 📉 Decreases **9.2%** compared to Dec-2024
- 📉 Decreases **49.6%** compared to Jan-2024
- 📈 **3.9 mil. USD** more than the monthly average rate in 2024
- 💎 Accumulated 1 months of 2025 reaches **92.7 mil.USD, 8.7%** of total 2024

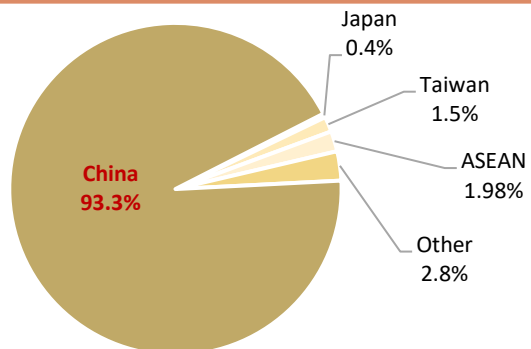
VOLUME

281.6

ths. tons

- 📉 Decreases **0.9%** compared to Dec-2024
- 📉 Decreases **29.9%** compared to Jan-2024
- 📈 **77.5 ths. tons** more than the monthly average rate in 2024
- 💎 Accumulated 1 months of 2025 reaches **28.2 ths. tons, 11.5%** of total 2024

## Percentage of export value to China, Jan-2025



## Changes in percentage of export value to China, Jan-2025

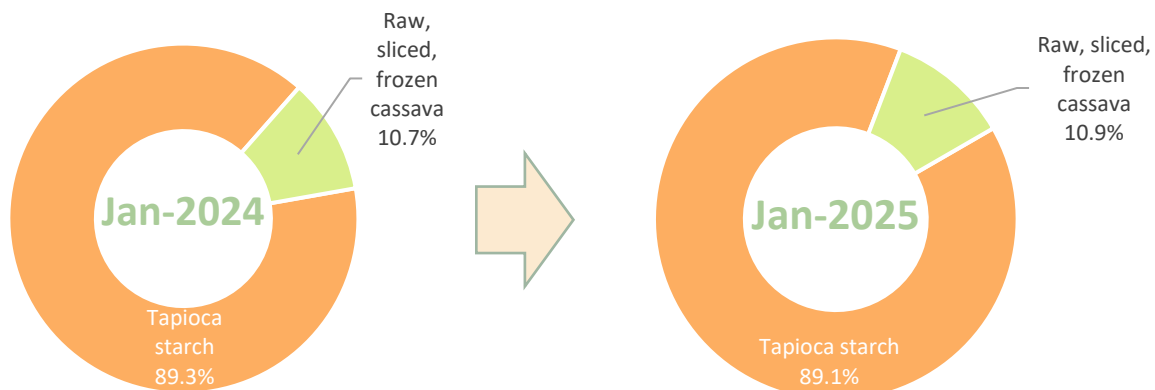






# CASSAVA & CASSAVA PRODUCTS

## Structure of export value by products to China, Jan-2025



## Export results to China, Jan-2025



### Raw, sliced, frozen cassava

Value: **10.07** mil. USD

Increases **25.6%** compared to Dec-2024

Decreases **12.1%** compared to Jan-2024



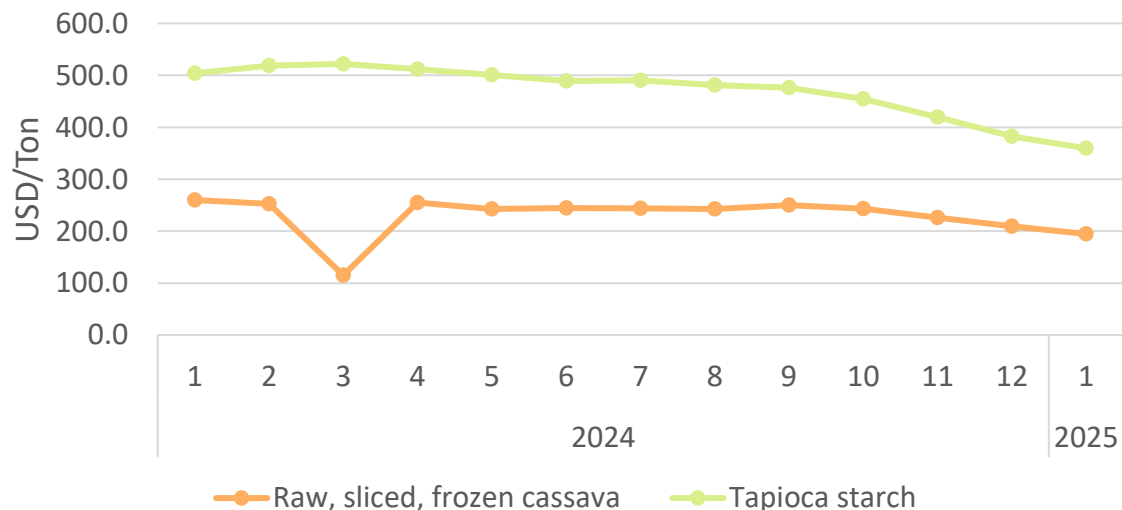
### Tapioca starch

Value: **82.62** mil. USD

Decreases **49%** compared to Dec-2024

Decreases **49.7%** compared to Jan-2024

## Percentage of export value to China, Jan-2025



### Tapioca starch

The average export price in Jan-2025 is **359 USD/ton**; **decreases 6%** compared to the previous month; and **decreases 29%** compared to the same month of 2024.

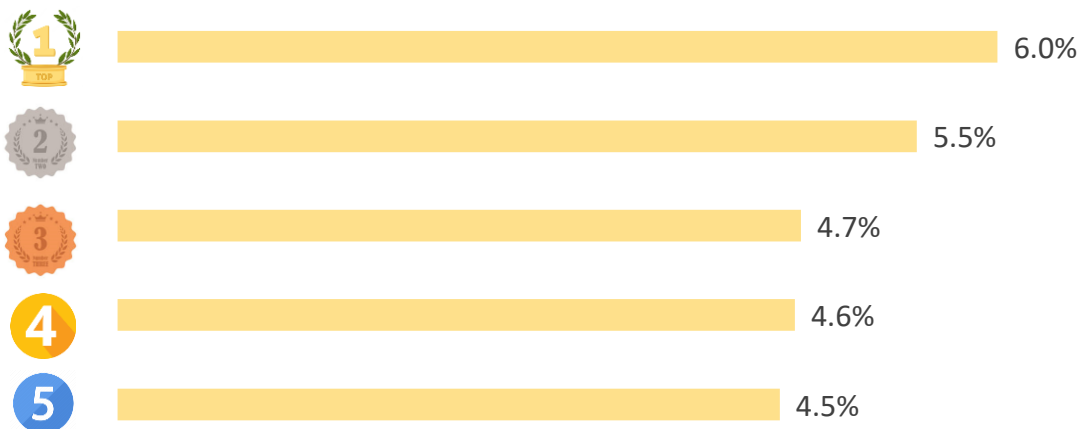
### Raw, sliced, frozen cassava

The average export price in Jan-2025 is **194 USD/ton**; **decreases 7.2%** compared to the previous month; and **decreases 25%** compared to the same month of 2024.

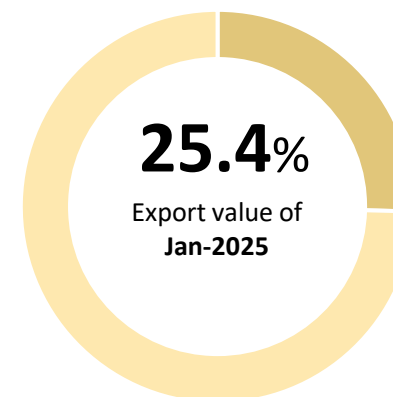


# CASSAVA & CASSAVA PRODUCTS

## TOP 5 export enterprises by value to Volume ratio of TOP 5 export enterprises to China, Jan-2025



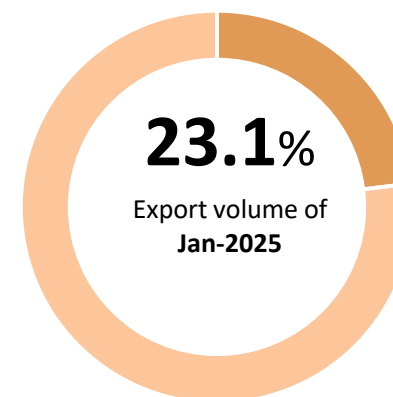
## Value ratio of TOP 5 export enterprises to China, Jan-2025



## TOP 5 export enterprises by volume to China, Jan-2025



## Volume ratio of TOP 5 export enterprises to China, Jan-2025





### **The Chinese tapioca starch market is in a short-term stagnation.**

The supply of raw cassava materials in Thailand and Vietnam remains abundant, with the operating rate of starch processing plants is 82%. After the Lunar New Year, the volume of goods arriving at Chinese ports increased, leading to a increase in inventory levels. As of February 19, the total tapioca starch inventory was approximately 193,200 tons, up 87.39% from the previous month, creating significant pressure on the port system.

The demand for tapioca starch in China shows recovery signals but with in the low rate. With abundant supply and sluggish demand growth, the supply-demand imbalance may persist.

Tapioca starch prices are expected to fluctuate with low level in the short term. To address this challenge, the Chinese cassava sector needs to implement effective inventory management measures and flexible regulation strategies, aiming for recovery in the second half of the year.



### **Linh Thanh Town, Linh Son District, Guangxi Province Develops Cassava sector**

In Linh Thanh Town, the edible cassava sector has been developing with support from the Chinese Academy of Tropical Agricultural Sciences. This locality cultivates the "Golden No. 3" cassava variety and applies the "E-commerce + Cassava" model, helping to expand the market.

Currently, the town has established a complete production chain with 100 hectares of cassava, yielding 6.25 tons/ha and generating approximately 1.25 million USD annually for the local economy. In the future, the locality will continue to adopt processing, preserving technologies and piloting new cassava varieties to promote rural development.

*Source: Farmchina.org.cn*

### **Dong Thanh Town, Dam Chau City, Hainan Province Promotes Cassava Production Chain**

Dong Thanh Town is strengthening the comprehensive cassava production chain from cultivation and processing to storage and distribution. The local government supports farmers by providing high-quality cassava varieties, offering technical guidance, and subsidizing purchases, contributing to rural development.

Currently, Dong Thanh is the largest cassava-growing area in Hainan province, with a cultivation area of over 133.4 hectares, primarily growing the "Hoa Nam No. 9" variety. To enhance production efficiency, the locality has invested over 2.06 million USD in modern processing facilities and the development of an agricultural product brand.

*Source: Farmchina.org.cn*







Any comments. please send to:

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

