

INSTITUTE OF STRATEGY AND POLICY
ON AGRICULTURE AND ENVIRONMENT

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MONTHLY REPORT ON AGRI-PRODUCT EXPORT

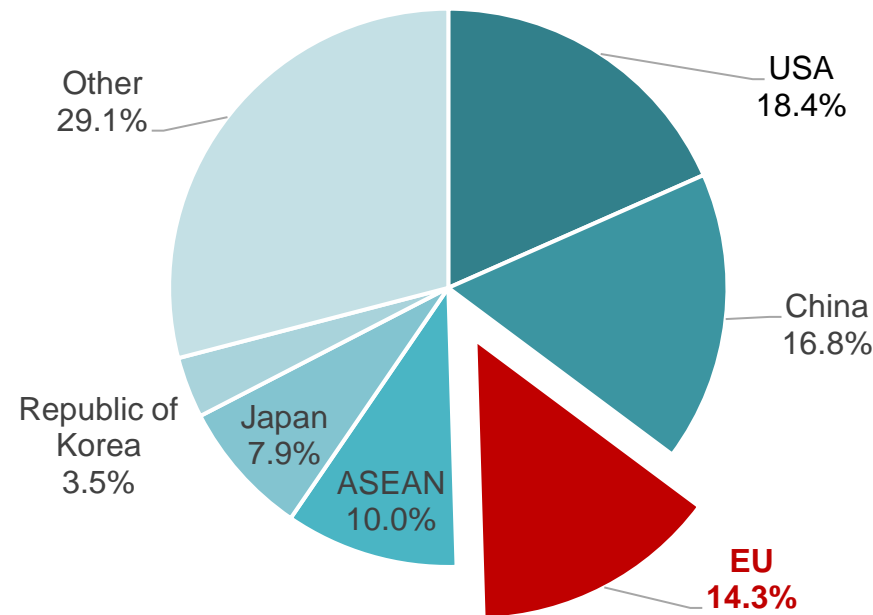
FROM VIETNAM TO **THE EU MARKET**



Center for Information and Services in
Agriculture and Environment (AGREINFOS)

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

Export proportion of AFF product to the EU, Feb-2025



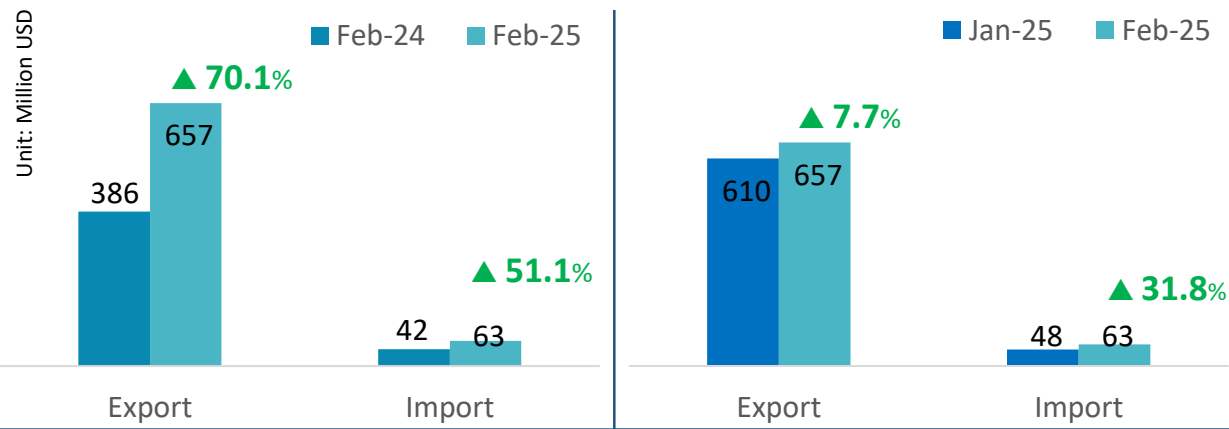
Changes in export proportion of AFF product to the EU Feb-2025 compared to Jan-25 and Feb-24

	Export value (mil. USD)	Compared to Jan-25	Compared to Feb-24
USA	842	▼ 3.6%	▲ 0.7%
China	770	▼ 1.0%	▼ 2.2%
EU	657	▲ 2.1%	▲ 2.5%
ASEAN	459	▲ 1.8%	▼ 3.7%
Japan	360	▲ 0.2%	▲ 1.2%
Republic of Korea	162	▼ 0.5%	▼ 0.1%
Total export	4.581		

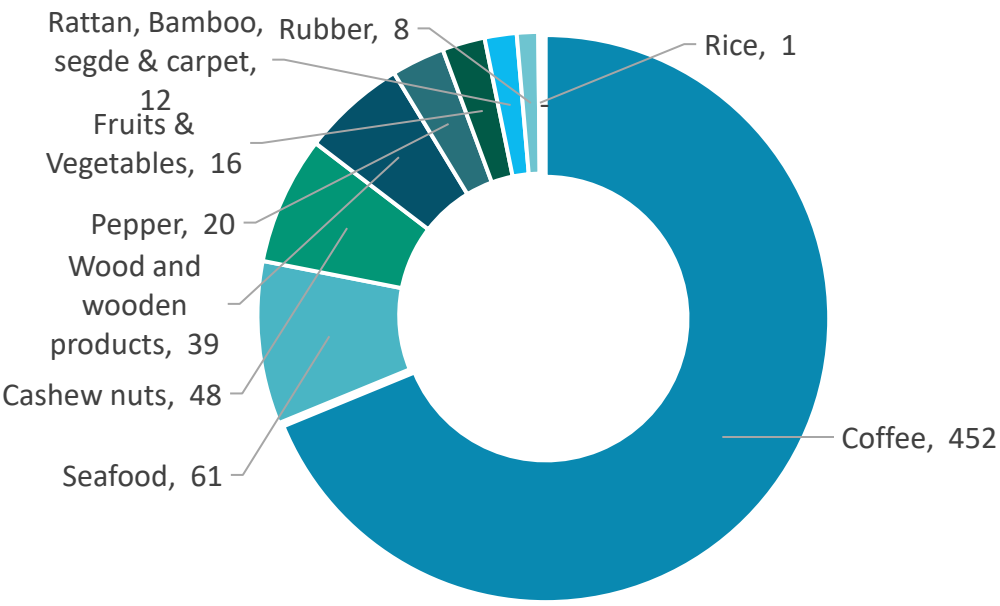
Source: Calculated from data of the Department of Customs

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

AFF product import-export turnover between Vietnam and the EU, Feb-2025

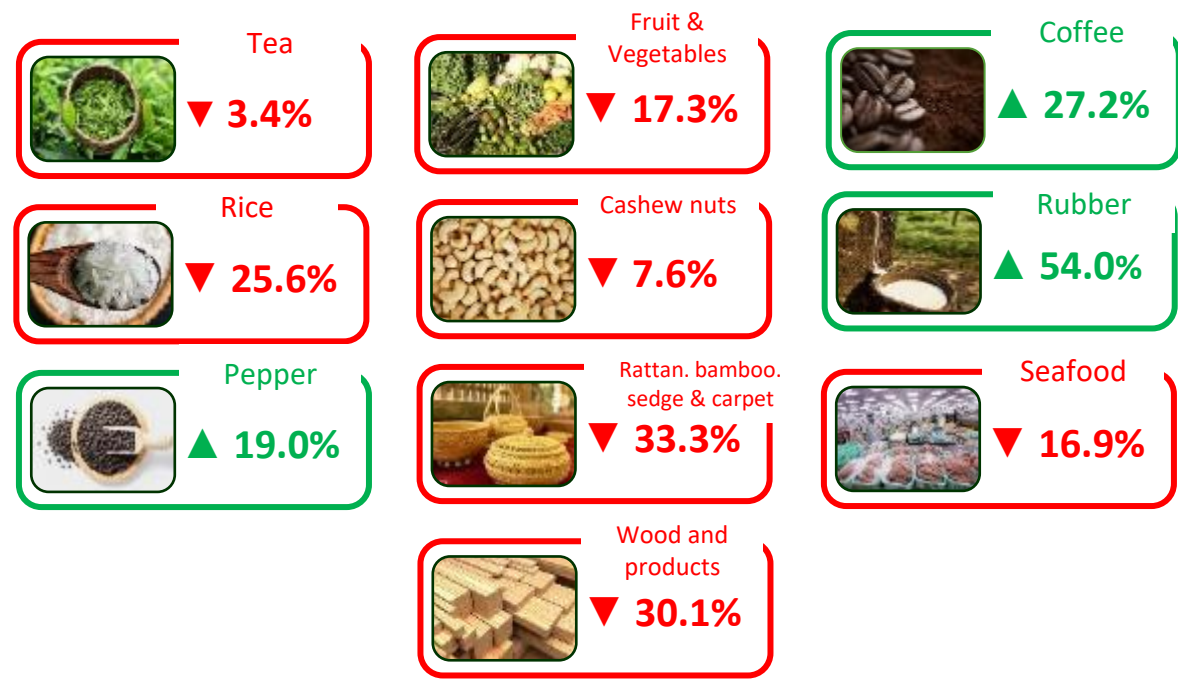


Key AFF product export value to the EU, Feb-2025

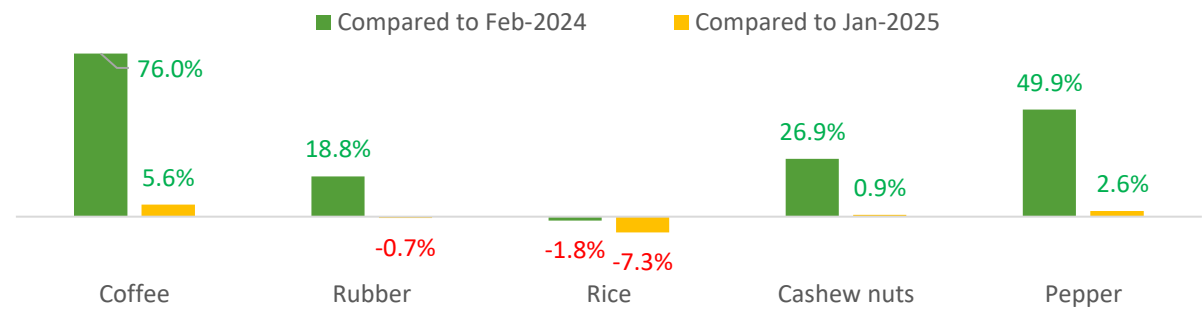


Unit: Million USD

Changes in key AFF product export value to the EU in Feb-2025 compared to Jan-2025



Changes in average export value of key AFF products to the EU in Feb-2025 compared to Feb-2024 and Jan-2025



Source: Calculated from data of the Department of Customs

EU considers agriculture as a strategic sector

The European Union (EU) is developing an new ambitious vision for agriculture sector to foster a sustainable and equitable future. During the meeting of the Council of Agriculture and Fisheries in Brussels, ministers discussed the vision presented by the European Commission (EC), focusing on four key areas:

enhancing the appeal of farming to young people, increasing the sector's competitiveness and adaptability, improving rural livelihoods, and promoting actions for climate. The EU considers agriculture as a strategic sector, emphasizing the need to support fairer income for farmers through reforming the Common Agricultural Policy (CAP), encouraging direct participation

of farmers in policy-making processes. Member countries state widely agree with this direction and call for maintaining a stable budget for the CAP, simplifying administrative procedures, promoting technological innovation, and protecting rural areas from unfair competition in the international market.

Source: Nhandan.vn



Red alert for European economy

According to Euronews, the European economy is at a crucial turning point, facing numerous challenges as current decisions will shape its future trajectory. Although the eurozone recorded a growth of 0.9% in 2024, the pace of growth slowed down towards the end of the year. Factors contributing to uncertainty include unpredictable trade policies from the United States, especially high tariffs on European goods, rising inflation, and negative impacts on the European Central Bank's (ECB) plans to cut interest rates.

In response to this context, the EU announced the "Competitiveness Compass" plan, aimed at fostering technological innovation, reducing carbon emissions, strengthening supply chains, and reducing dependencies. Enhancing competitiveness has become the EU's top priority, alongside issues related to defense and economic security.

Experts and business leaders are urging urgent action to address the system's weaknesses, creating favorable conditions for businesses to thrive and maintaining Europe's economic position on the global stage.

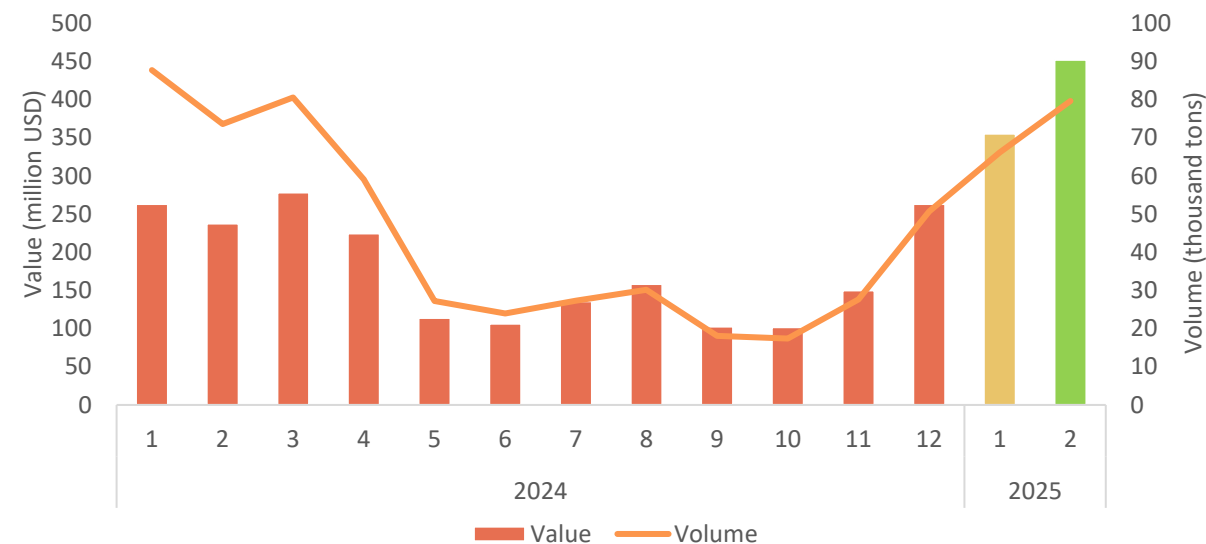
Source: Baotintuc.vn





COFFEE

Export volume and value to the EU, Feb-2025



Export results to the EU, Feb-2025

VALUE

452 mil.USD

↗ Increase **27.2%** compared to Jan-25

↗ Increase **90.4%** compared to Feb-24

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

❖ Accumulated 2 months of 2025 reaches **807.6 mil. USD**, **37.8%** of total 2024.

VOLUME

79.7 thousand tons

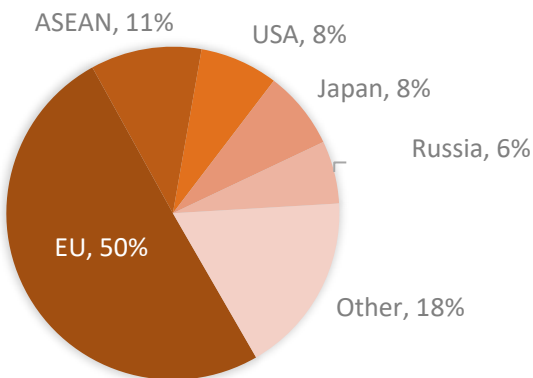
↗ Increase **20.5%** compared to Jan-25

↗ Increase **8.2%** compared to Feb-24

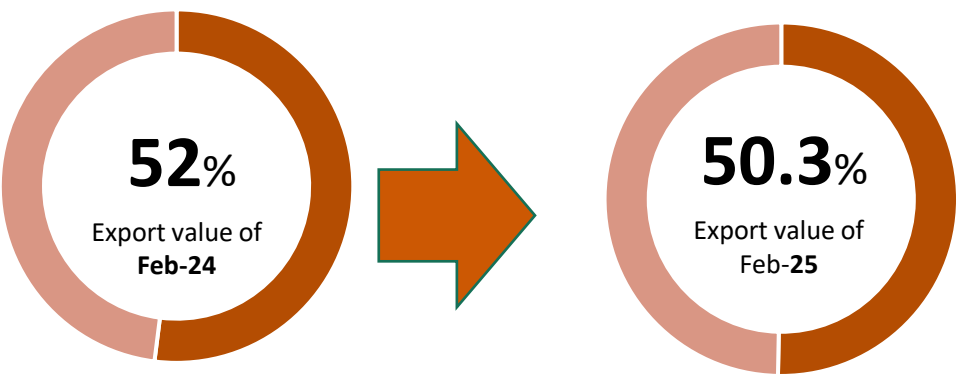
↗ **36 thousand tons** more than the monthly average rate in 2024.

❖ Accumulated 2 months of 2025 reaches **145.8 thousand tons**, **27.8%** of total 2024.

Percentage of export value to the EU, Feb-2025



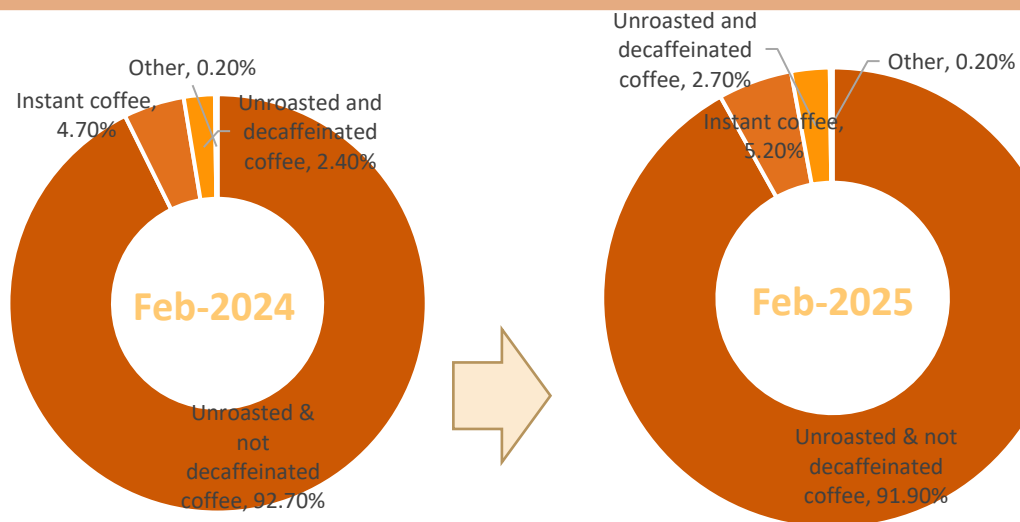
Changes in percentage of export value to the EU, Feb-2025



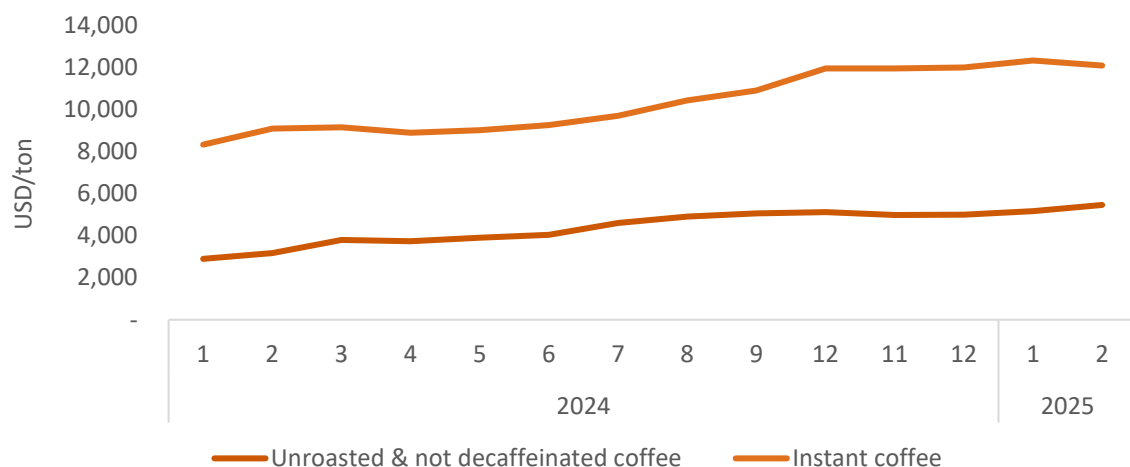


COFFEE

Structure of exports by products to the EU, Feb-2025



Average export price to the EU, Feb-2025



Export results to the EU, Feb-2025



Unroasted & not decaffeinated coffee

Value: **421.6** mil. USD

Increase **30.7%** compared to Jan-25

Increase **110%** compared to Feb-24



Instant coffee

Value: **23.7** mil. USD

Increase **15.7%** compared to Jan-25

Increase **135%** compared to Feb-24



Unroasted and decaffeinated coffee

Value: **12.5** mil. USD

Decrease **20.7%** compared to Jan-25

Increase **138%** compared to Feb-24

Instant coffee

The average export price in Feb-2025 is **12.072** USD/ton; decrease **2%** compared to the previous month, and increase **33%** compared to the same month of 2024.

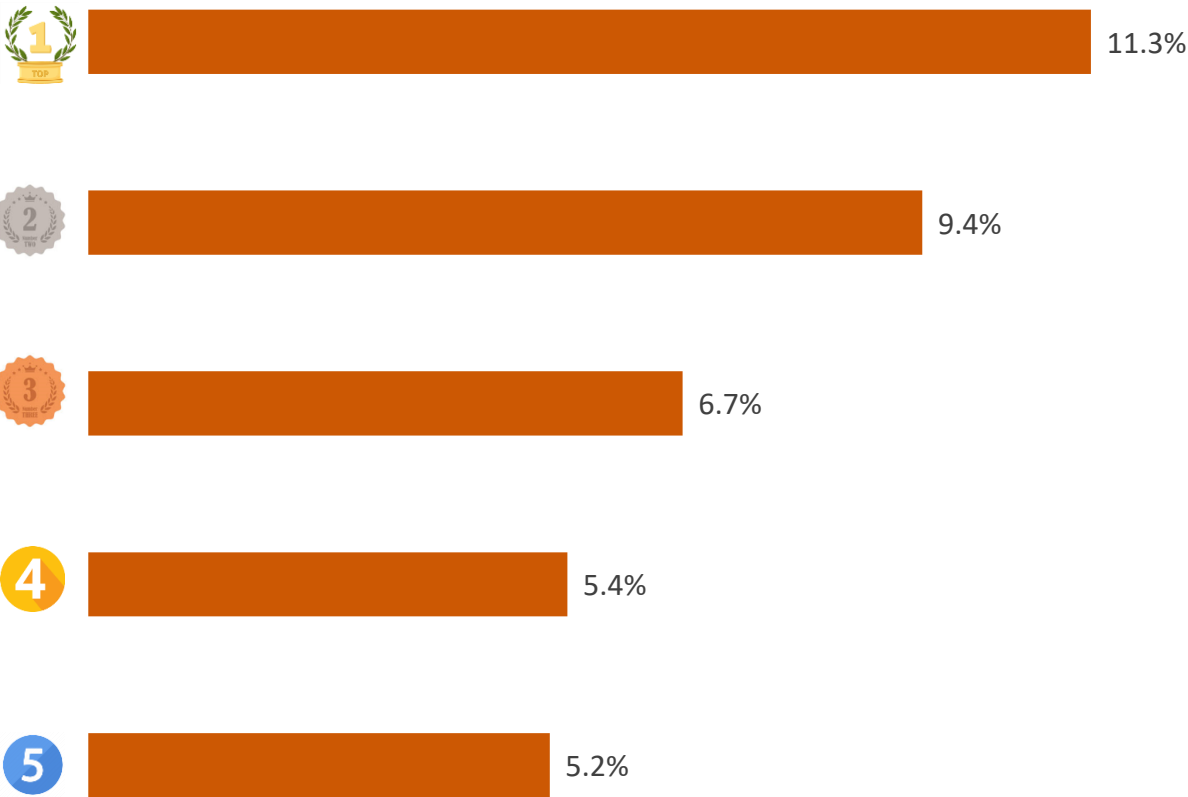
Unroasted & not decaffeinated coffee

The average export price in Feb-2025 is **5.455** USD/ton; increase **5.7%** compared to the previous month, and increase **72.3%** compared to the same month of 2024.

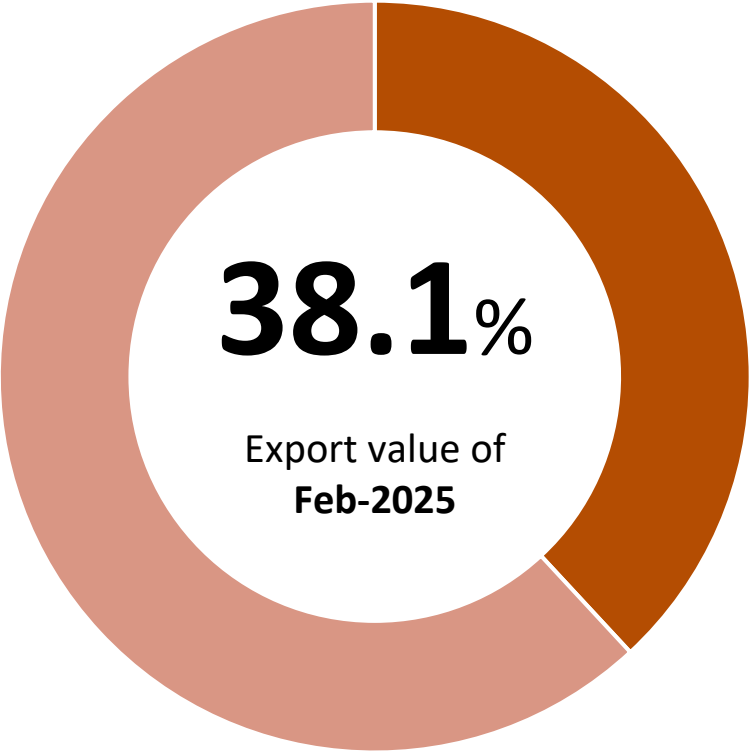


COFFEE

TOP 5 export enterprises by value to **the EU, Feb-2025**



Value ratio of TOP 5 export enterprises to **the EU, Feb-2025**



Source: Calculated from data of the Department of Customs



COFFEE

SPOTLIGHTS



The German Coffee Association (Deutscher Kaffeverband) reported that, in 2024, the average coffee consumption per capita in Germany reached 163 liters per year.

The whole bean coffee segment saw a 2% growth compared to the previous year. Instant coffee also grew by 2%, while single-serve coffee pods experienced a 6% increase in 2024.

The trend of consuming sustainable certified coffee is on the rise, with products bearing labels such as Organic, Fairtrade, Rainforest Alliance, or 4C increasing by 8.6% during the year. This growth is driven by consumers' increasing focus on transparency in supply chains, environmental protection, and social responsibility, as well as the connection with the upcoming EU Due Diligence Regulation (EUDR).





COFFEE

SPOTLIGHTS



Rising prices of coffee are causing a shortage at major retail chains across Europe. In the Netherlands, the two largest supermarket chains, Albert Heijn and Jumbo, have temporarily stopped importing certain products from the JDE Peet's Group due to high prices and disagreements over renegotiating supply contracts.

A similar situation is unfolding in Germany and Belgium. Retail chains such as Edeka, Aldi Nord, and Colruyt have been forced to suspend orders or disrupt supply due to an inability to reach a price agreement with JDE. Notably, the online retailer Picnic completely removed JDE products from its system.

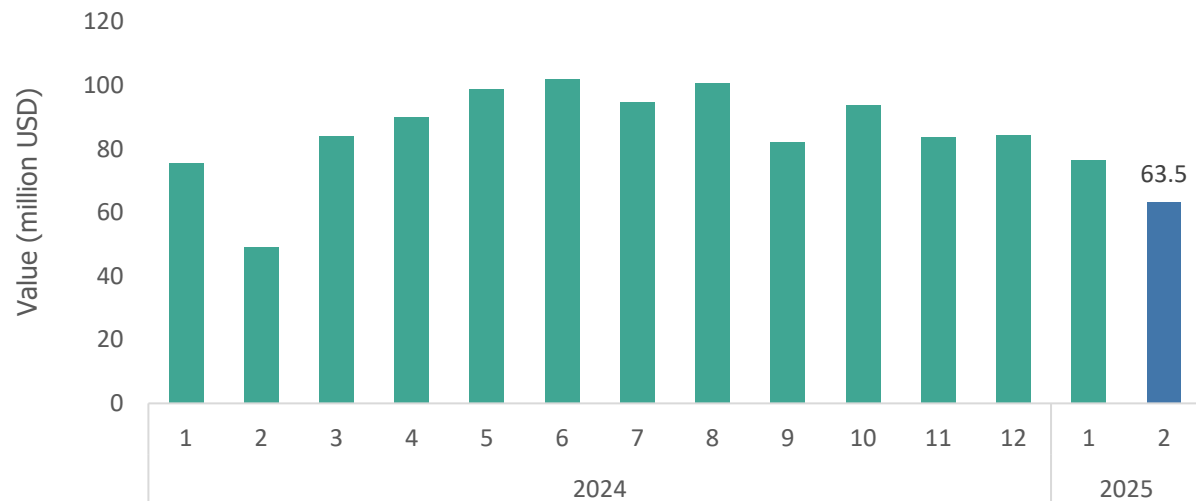
The main cause of this issue is the pressure from rising input costs. JDE Peet's stated that price increases are unavoidable, although it acknowledges that the negotiations with retailers are taking longer than expected. CEO - Mr. Rafael Oliveira emphasized that this is a necessary response to the increasing cost of production.





SEAFOOD

Export value to the EU, Feb-2025



Export results to the EU, Feb-2025

VALUE
63.5 *mil. USD*



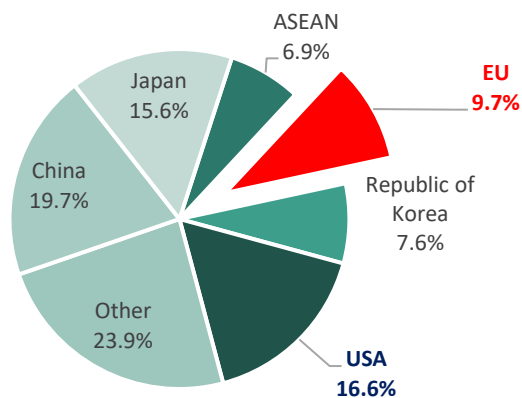
↘ Decrease **16.9%** compared to Jan-25

↗ Increase **29.5%** compared to Feb-24

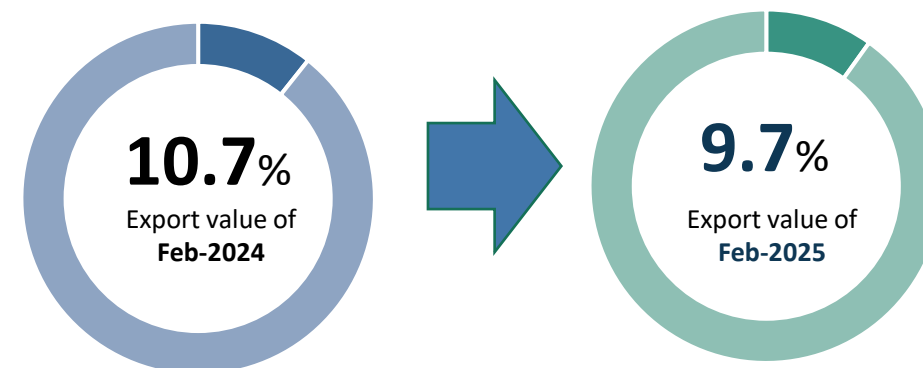
▼ **23.1 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **139.9** mil. USD, **13.5%** value of total 2024

Percentage of export value to the EU, Feb-2025



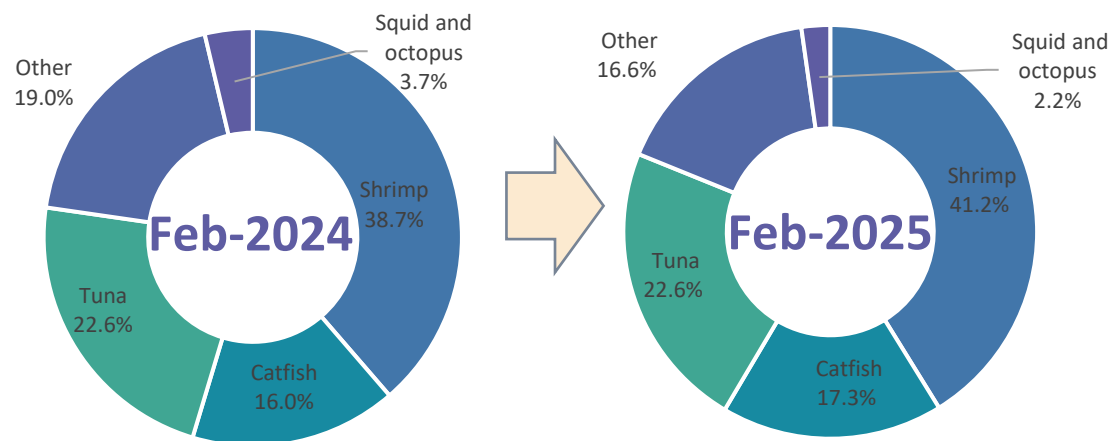
Changes in percentage of export value to the EU, Feb-2025



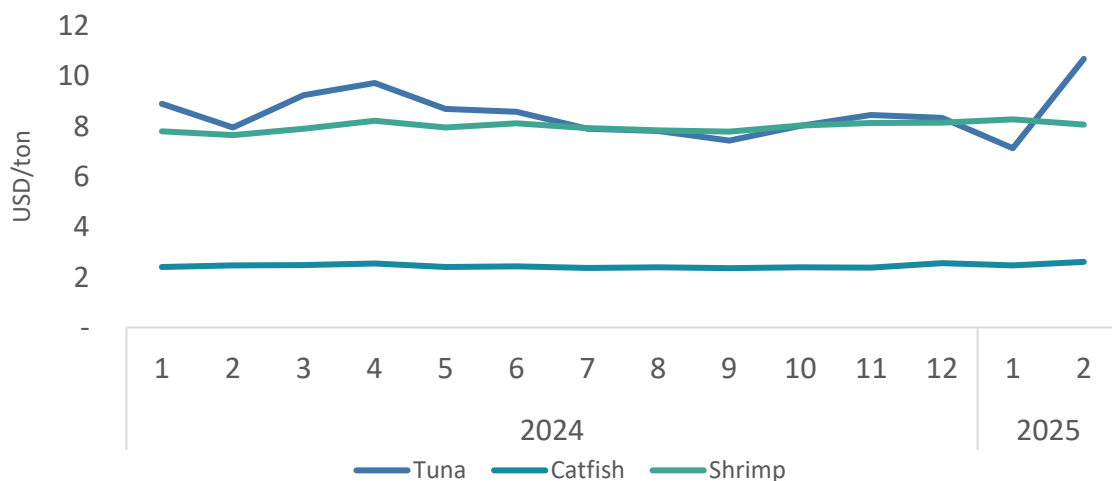


SEAFOOD

Structure of exports by products to the EU, Feb-2025



Average export price to the EU, Feb-2025



Export results to the EU, Feb-2025



Shrimp

Value: **26.1** mil. USD

Decrease **22.7%** compared to Jan-25

Increase **38.0%** compared to Feb-24



Catfish

Value: **11.0** mil. USD

Decrease **17.2%** compared to Jan-25

Increase **40.4%** compared to Feb-24



Tuna

Value: **14.4** mil. USD

Increase **0.2%** compared to Jan-25

Increase **29.4%** compared to Feb-24

Tuna

The average export price in Feb-2025 is **10.7** USD/kg; **increase 49.9%** compared to the previous month; and **increase 34.3%** compared to the same month of 2024.

Catfish

The average export price in Feb-2025 is **2.6** USD/kg; **increase 5.5%** compared to the previous month; and **increase 5.6%** compared to the same month of 2024.

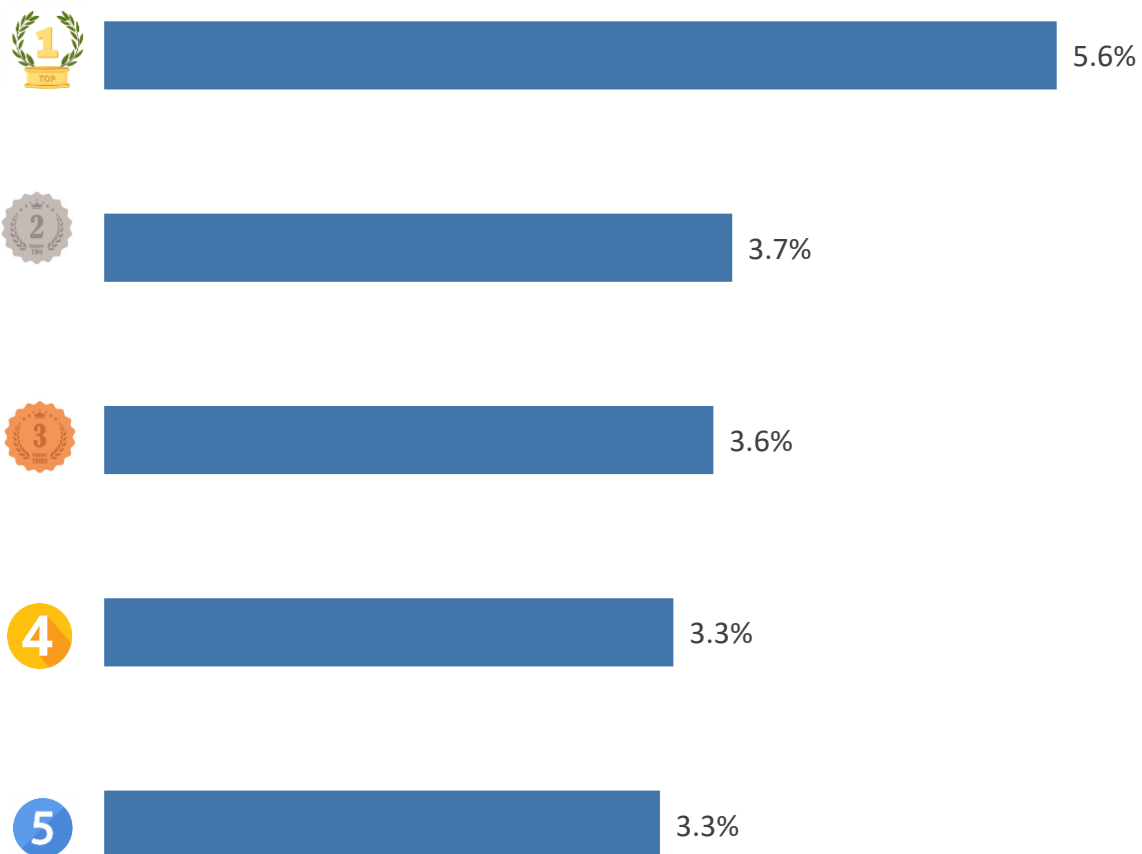
Shrimp

The average export price in Feb-2025 is **8.1** USD/kg; **decrease 2.6%** compared to the previous month; and **increase 5.5%** compared to the same month of 2024..

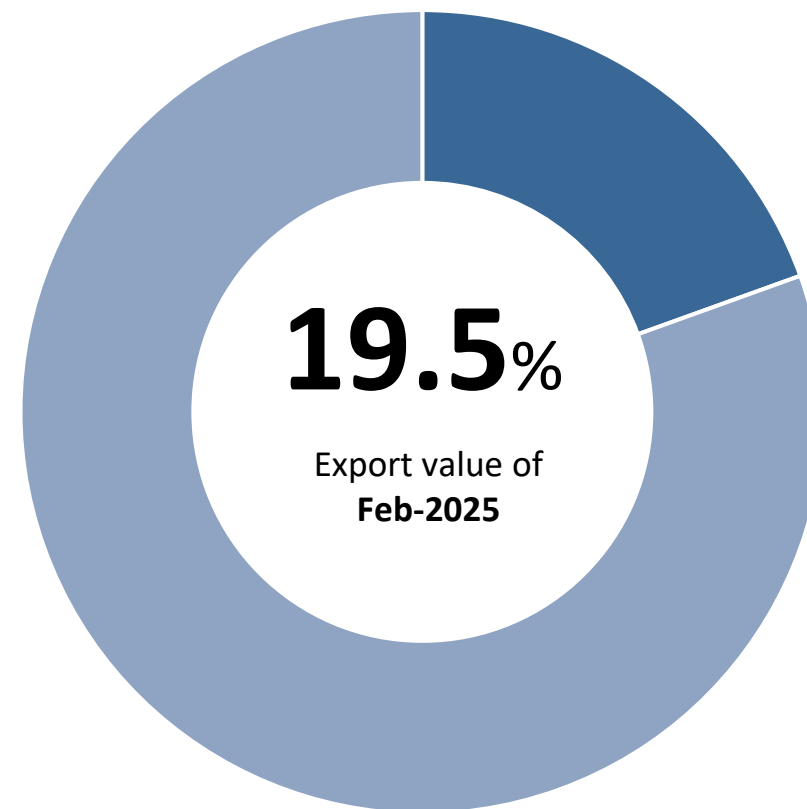


SEAFOOD

TOP 5 export enterprises by value to the EU, Feb-2024



Value ratio of TOP 5 export enterprises to the EU, Feb-2024



SPOTLIGHTS

The EU's tuna sector is concerned that the FTA with Thailand will lead to unfair competition

As the EU begins a new round of negotiations for a Free Trade Agreement (FTA) with Thailand, the European tuna sector, represented by Europêche, called for the exclusion of tuna products from this agreement. Europêche warns that the removal of the current 24% tariff on Thailand's tuna will lead to a massive inflow of imports into the EU, destabilizing the market and putting European businesses at a disadvantage. Thailand is the world's largest exporter of processed tuna but their products have not yet met the EU's standards on labor, environmental, and food safety regulations.

In contrast, the EU tuna ships operates under a sustainable model with the highest operational costs globally due to strict adherence to regulations on control, labor, and environmental protection. However, the sector is facing challenges, with two major companies having to shut down in 2024. Europêche emphasizes that the EU cannot impose high standards on domestic businesses while allowing the import of substandard products without tariffs. They called for the maintenance of tariffs and strict rules of origin to protect the European tuna sector.

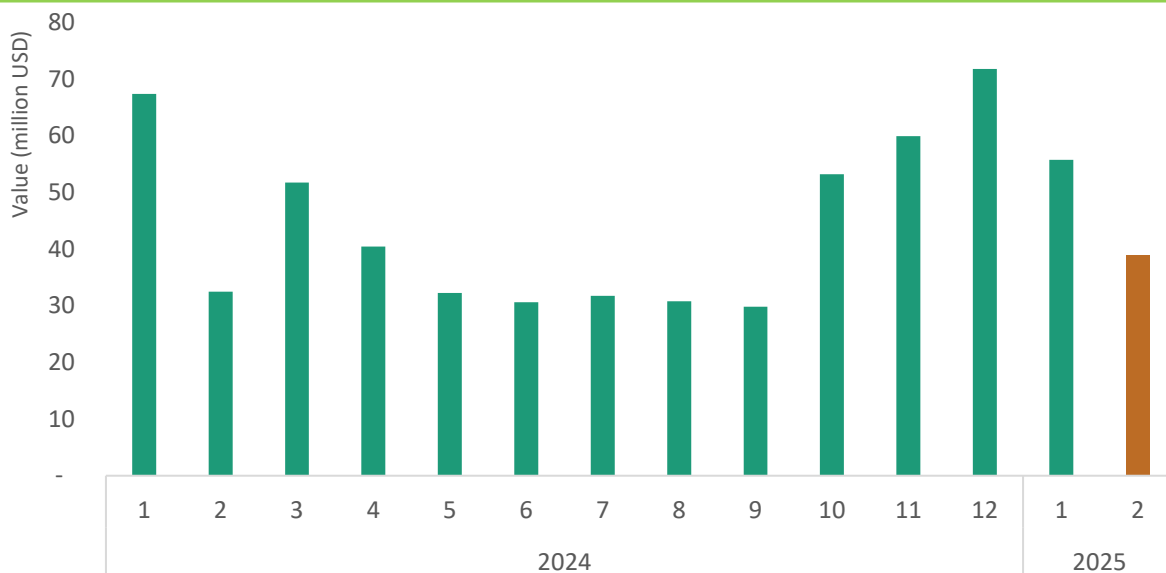
Source: Thefishingdaily (3/2025)





WOOD AND WOODEN PRODUCTS

Export value to the EU, Feb-2025



Export results to the EU, Feb-2025

VALUE



39

mil. USD

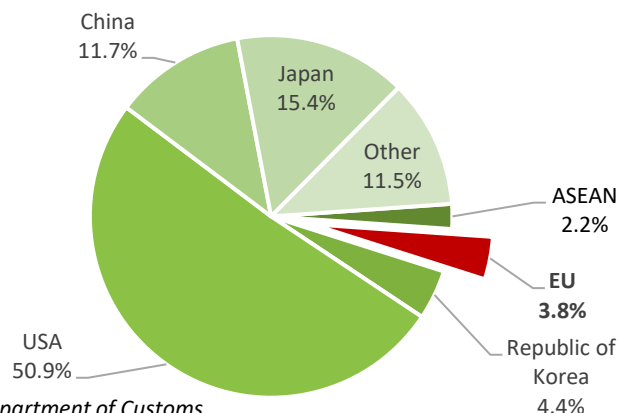
↘ Decrease **30.1%** compared to Jan-25

↗ Increase **20.0%** compared to Feb-24

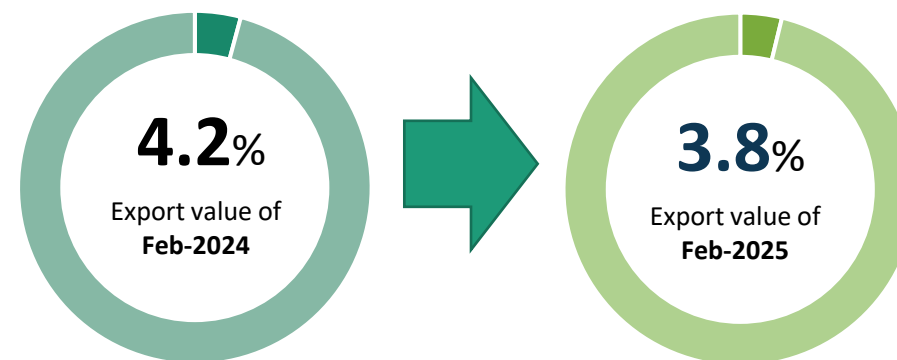
↘ **5.4 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches đạt **94.7** mil. USD, **17.8%** of total 2024

Percentage of export value to the EU, Feb-2025



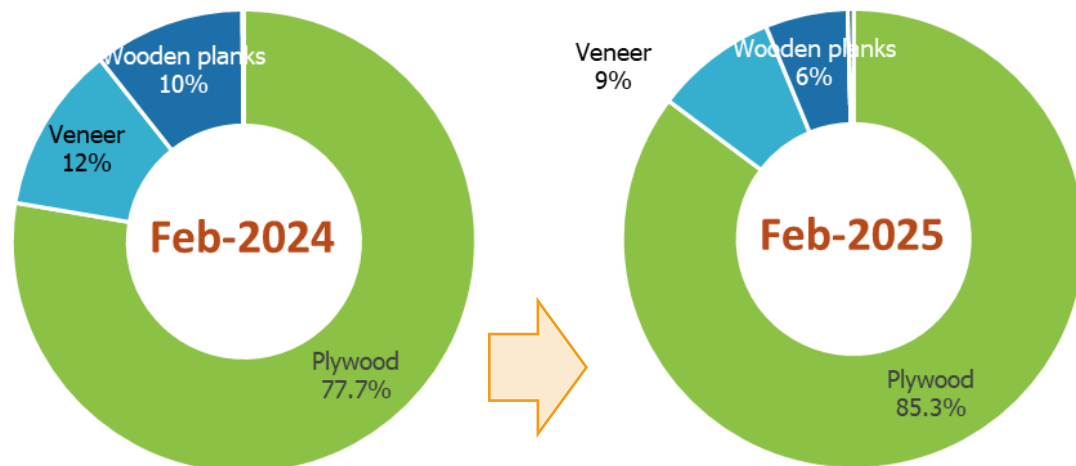
Changes in percentage of export value to the EU, Feb-2025





WOOD AND WOODEN PRODUCTS

Structure of exports by products to the EU, Feb-2025



Export results to the EU, Feb-2025



Plywood

Value: **2.9** mil. USD

1.5 times compared to Jan-25

3 times compared to Feb-24



Wooden planks

Value: **203.2** thousand USD

Decrease **18%** compared to Jan-25

Increase **103%** compared to Feb-24



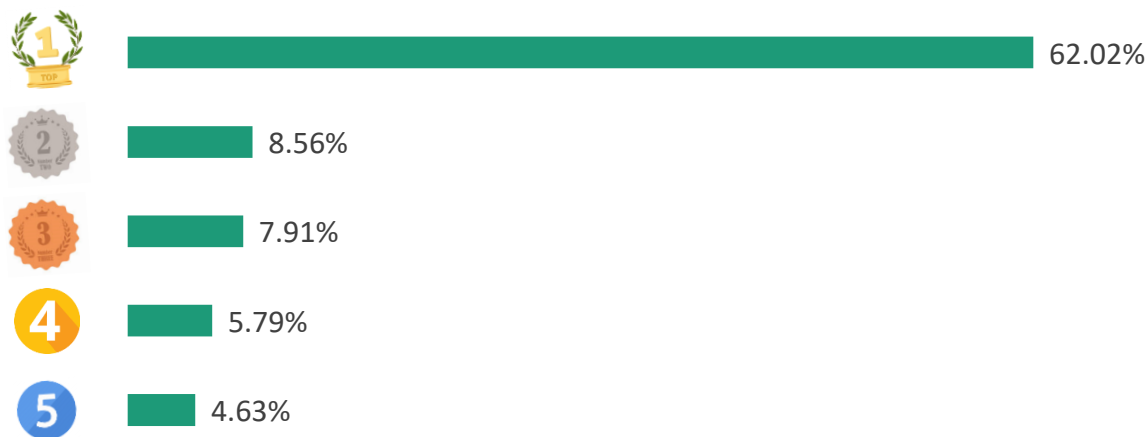
Veneer

Value: **300.4** thousand USD

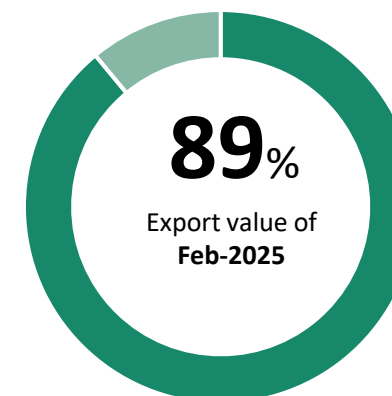
Increase **19%** compared to Jan-25

1.7 times compared to Feb-24

TOP 5 export enterprises by value to the EU, Feb-2025



Value ratio of TOP 5 export enterprises to the EU, Feb-2025





SPOTLIGHTS

Germany's timber trade revenue decreased by 6% in 2024 due to low market demand, according to a report from GD Holz. While most product categories have seen a decline in sales, wood products for gardens and outdoor applications have maintained stable consumption levels. Meanwhile, services related to the timber sector have experienced a 7% growth, but they only contribute around 2% to the total revenue of the sector. Forecasts suggest that the timber market will continue to face challenges in 2025, although there is hope for recovery in interior design and wood construction fields as the construction sector shows signs of improvement.

The EU construction industry is expected to recover in 2025 with a growth rate of 0.5%, after a 2% decline in 2024. Rising house prices are making new home construction more attractive. Countries like the Netherlands and Spain are seeing a stronger recovery, while Germany and France continue to face numerous challenges. Labor shortages and price differences between existing and new homes remain issues that need to be addressed.





CASHEW NUTS

Export volume and value to the EU, Feb-2024



Export results to the EU, Feb-2024

VALUE

51.22 mil. USD

↘ Decrease **7.6%** compared to Jan-25

↘ Decrease **0.05%** compared to Feb-24

↓ **7.3** mil. USD less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **117.4** mil.USD, **13%** of total 2024

VOLUME

7.361 tons

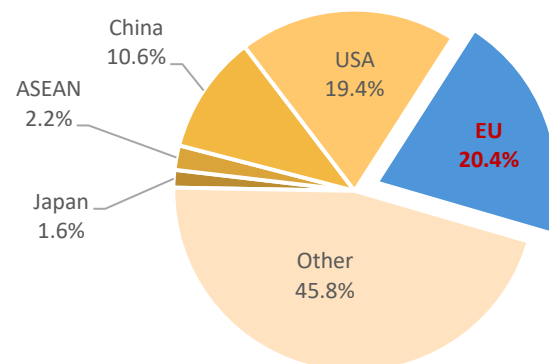
↘ Decrease **13.5%** compared to Jan-25

↘ Decrease **22.2%** compared to Feb-24

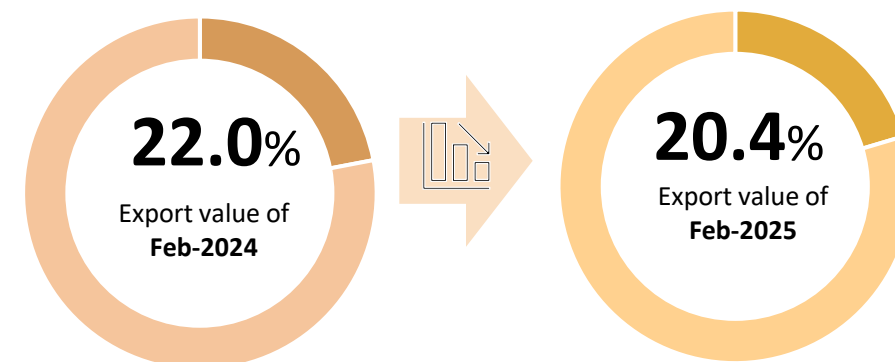
↓ **2.9** thousand tons less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **16.9** thousand tons, **11%** of total 2024

Percentage of export value to the EU, Feb-2024



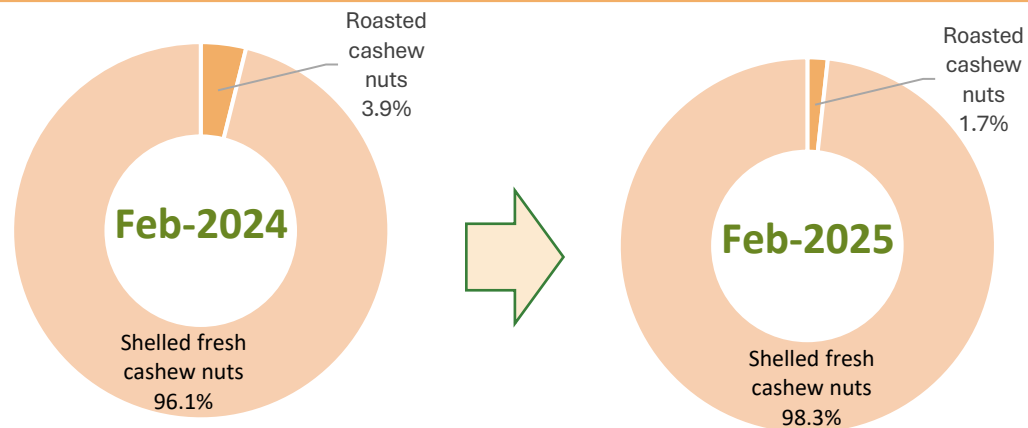
Changes in percentage of export value to the EU, Feb-2024



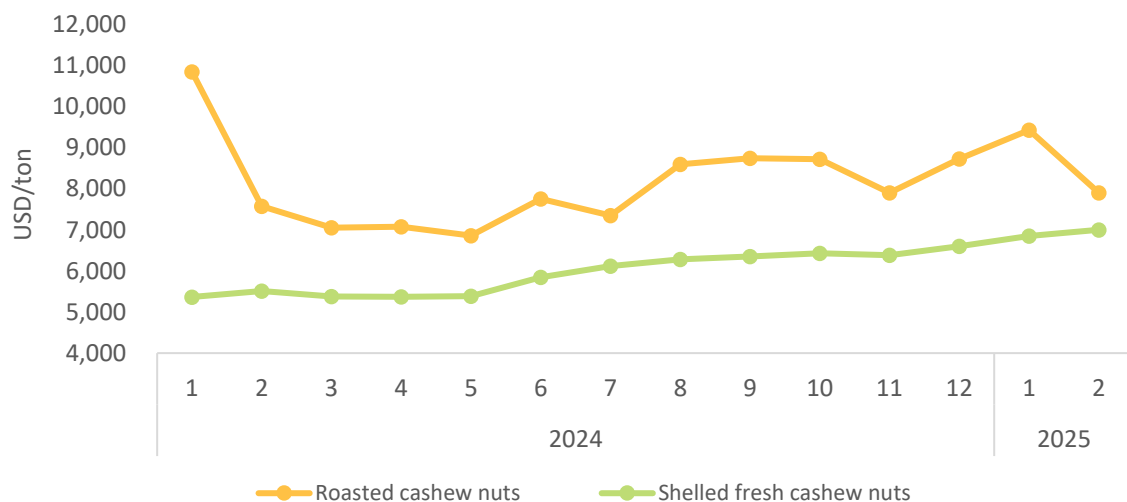


CASHEW NUTS

Structure of exports by products to the EU, Feb-2024



Average export price to the EU, Feb-2024



Export results to the EU, Feb-2024



Shelled fresh cashew nuts

Value: **50.33** mil. USD

Decrease **22%** compared to Jan-25

Increase **68%** compared to Feb-24



Roasted cashew nuts

Value: **0.89** mil. USD

Decrease **42%** compared to Jan-25

Decrease **26%** compared to Feb-24

Shelled fresh cashew nuts

The average export price in Feb-2024 is **7.001** USD/ton; **increase 2.2%** compared to the previous month; and **increases 27%** compared to the same month of 2024.

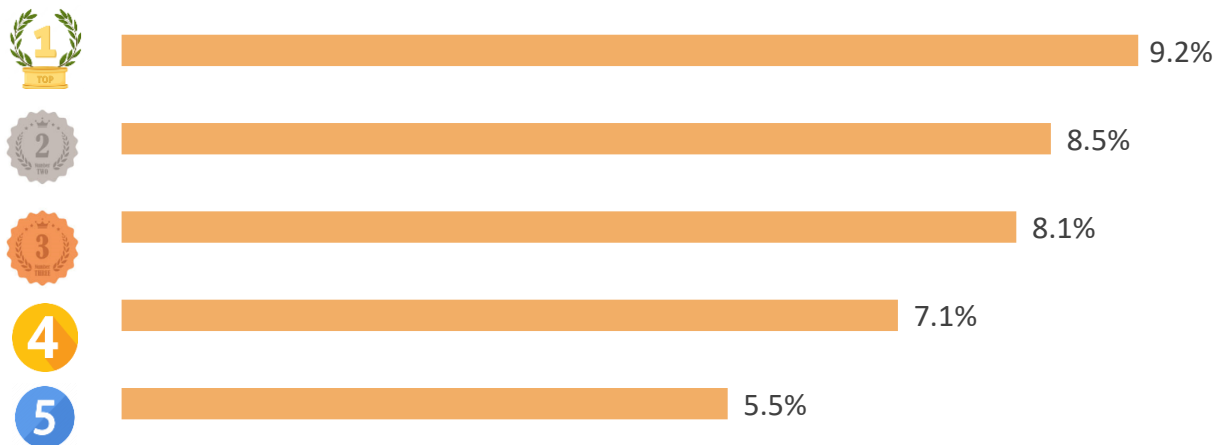
Roasted cashew nuts

The average export price in Feb-2024 is **7.898** USD/ton; **decrease 16%** compared to the previous month; and **increase 4.3%** compared to the same month of 2024.

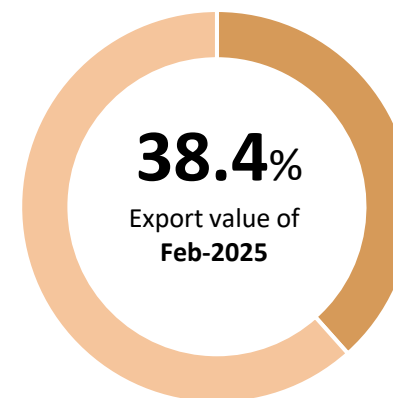


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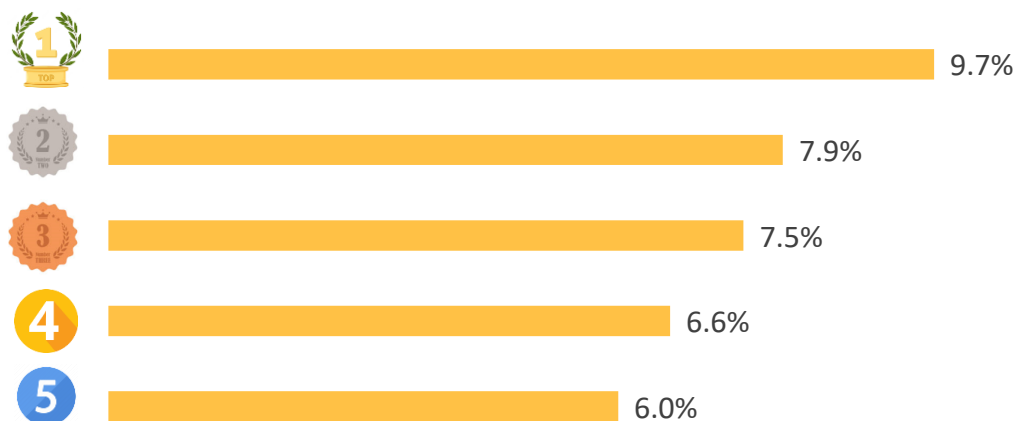
TOP 5 export enterprises by value to the EU, Feb-2024



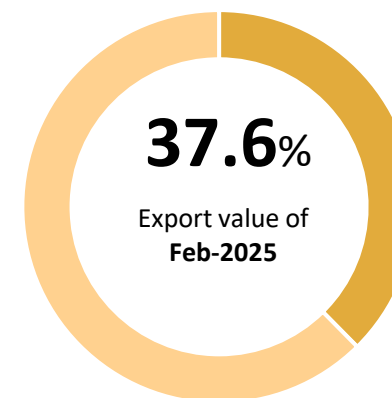
Value ratio of TOP 5 export enterprises to the EU, Feb-2024



TOP 5 export enterprises by volume to the EU, Feb-2024



Volume ratio of TOP 5 export enterprises to the EU, Feb-2024



Tanzania and the EU enhance cooperation to develop the cashew value chain



From March 10 to 13, 2025, a delegation of experts from the EU Directorate-General for International Partnerships (DG INTPA), GIZ/MOVE-ComCashew, and the Nitidae organization visited Tanzania to promote the sustainable and competitive development of cashew value chain. During the visit, the delegation worked with the Tanzania Cashew Board (CBT) and cashew processing companies. They also conducted field visits to two large processing plants in Kisenvule and Mkuranga.

During the mission, the GIZ/MOVE-ComCashew program introduced initiatives to support the East African cashew industry, such as the Matching Grant Fund (MGF), the Cashew Training Program (MTP), and policy support through regional cooperation.

The mission and workshop create opportunities for in-depth dialogue and demonstrated the EU's strong commitment to supporting the sustainable development of the Tanzanian cashew nut sector and enhancing its global competitiveness.





PEPPER

Export volume and value to the EU, Feb-2025



Export results to the EU, Feb-2025

VALUE
23.4 mil. USD \$

Increase **19%** compared to Jan-25

Increase **124%** compared to Feb-24

1.1 mil. USD more than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches 42.96 mil.USD, **16%** of total 2024

VOLUME
3.343 tons

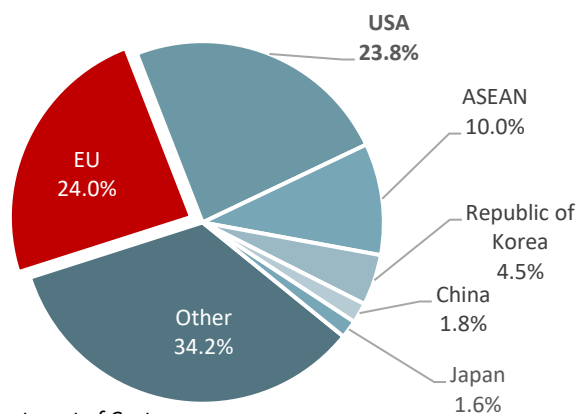
Increase **16%** compared to Jan-25

Increase **49%** compared to Feb-24

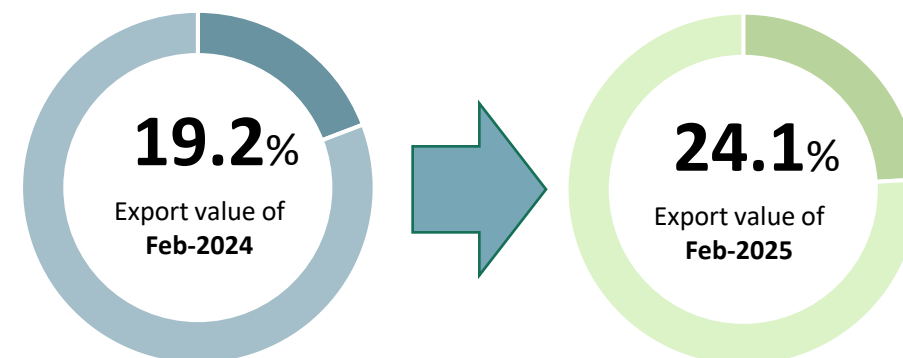
589 tons more than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches 6.2 thousand tons, **13%** of total 2024

Percentage of export value to the EU, Feb-2025



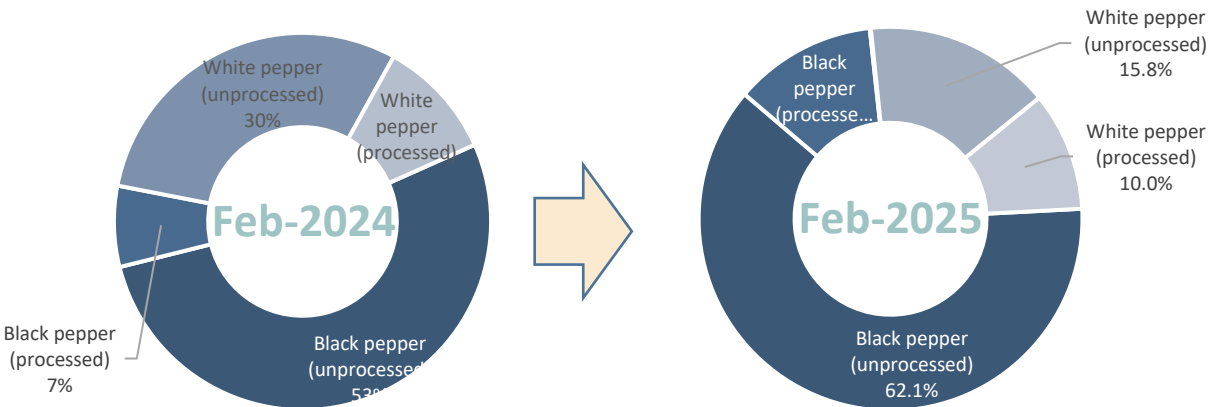
Changes in percentage of export value to the EU, Feb-2025



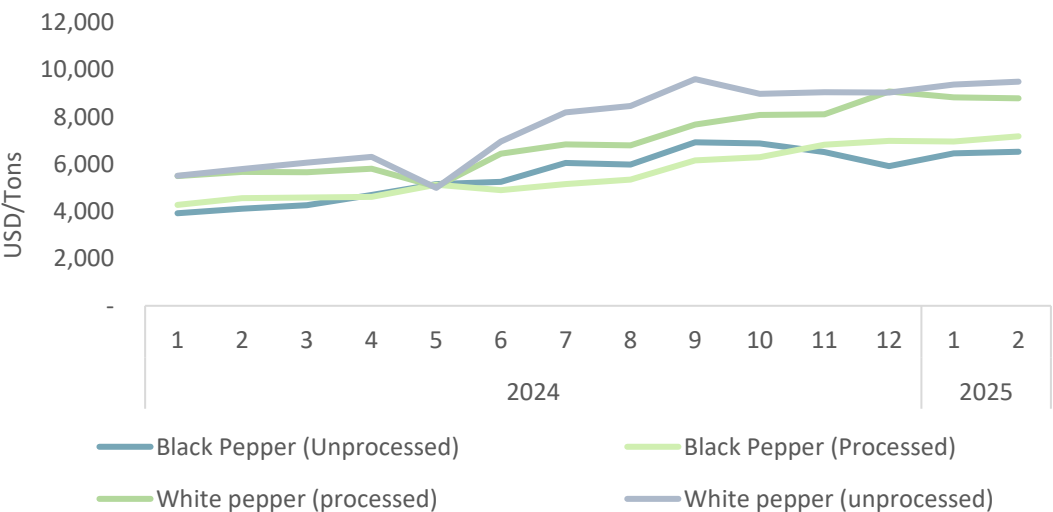


PEPPER

Structure of exports by products to the EU, Feb-2025



Average export price to the EU, Feb-2025



Source: Calculated from data of the Department of Customs

Export results to the EU, Feb-2025



Black pepper (unprocessed)

Value: **14.5** mil. USD
Increase **27%** compared to Jan-25
Increase **163%** compared to Feb-24



Black pepper (processed)

Value: **2.8** mil. USD
Increase **19%** compared to Jan-25
Increase **287%** compared to Feb-24

Black pepper (unprocessed)

The average export price in Feb-2025 is **6.455** USD/ton; **increase 1%** compared to the previous month; and **increase 58.8%** compared to the same month of 2024.

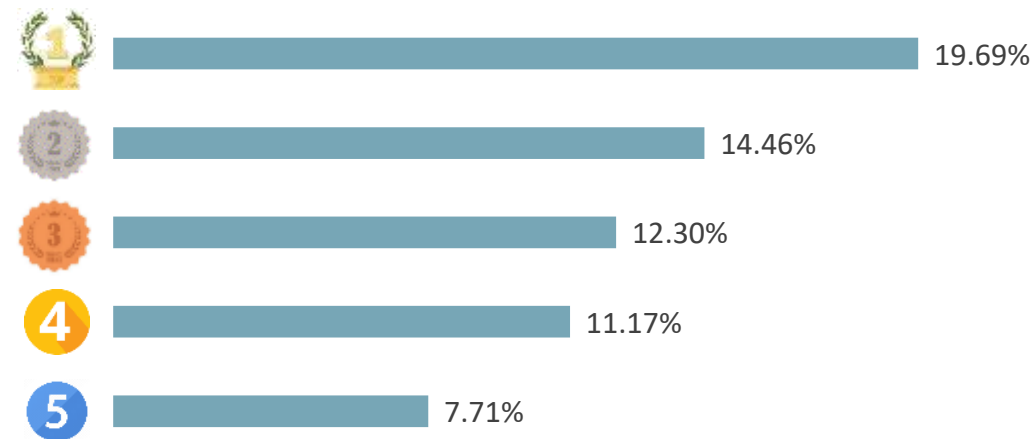
Black pepper (processed)

The average export price in Feb-2025 is **7.174** USD/ton; **increase 3.2%** compared to the previous month; and **increase 57.5%** compared to the same month of 2024.

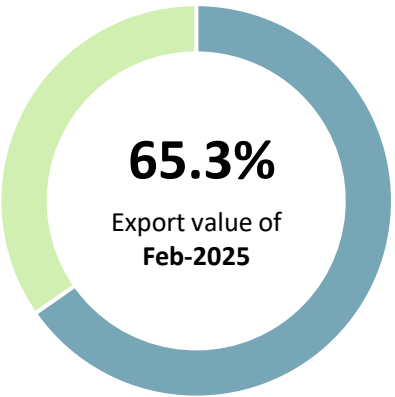


PEPPER

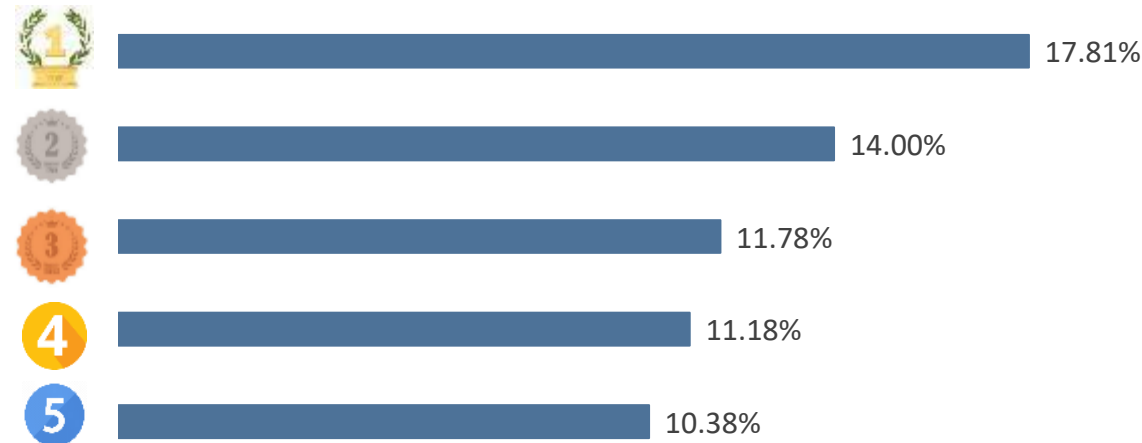
TOP 5 export enterprises by value to the EU, Feb-2025



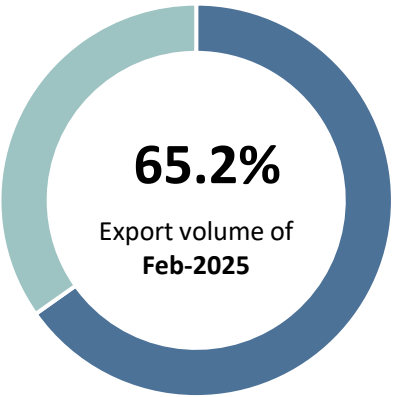
Value ratio of TOP 5 export enterprises to the EU, Feb-2025



TOP 5 export enterprises by volume to the EU, Feb-2025



Volume ratio of TOP 5 export enterprises to the EU, Feb-2025



PEPPER



SPOTLIGHTS

In 2024, Germany imported approximately 23.7 thousand tons of pepper from non-EU markets, valued at 137.8 million USD, which represents an increase of 43.6% in volume and 80.6% in value compared to 2023.

Germany's pepper imports from Vietnam saw a significant increase in 2024, reaching about 15 thousand tons, valued at 83.8 million USD, with an increase of 69.5% in volume and 120.3% in value compared to 2023.

In 2024, the import prices of pepper from Germany's main suppliers such as Vietnam, Brazil, and Indonesia increased by double digits, with growth rates of 30%, 30.9%, and 12% respectively.

Source: Vietnam Pepper and Spice Association





RUBBER

Export volume and value to the EU, Feb-2025



Export results to the EU, Feb-2025

VALUE

9.47 mil. USD

↗ Increase **54%** compared to Jan-25

↗ Increase **1.6%** compared to Feb-24

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

❖ Accumulated 2 months of 2025 reaches **15.6 mil. USD**, **8.8%** of total 2024

VOLUME

5.068 tons

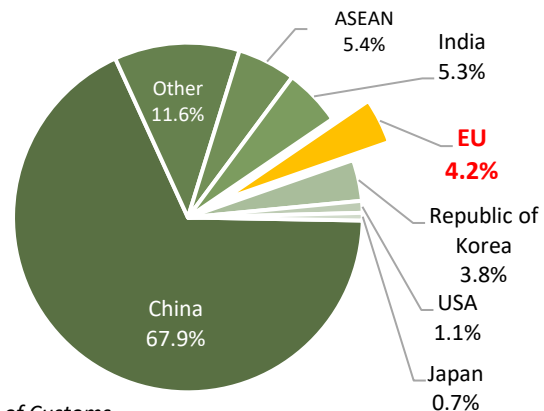
↗ Increase **57%** compared to Jan-25

↘ Decrease **15.3%** compared to Feb-24

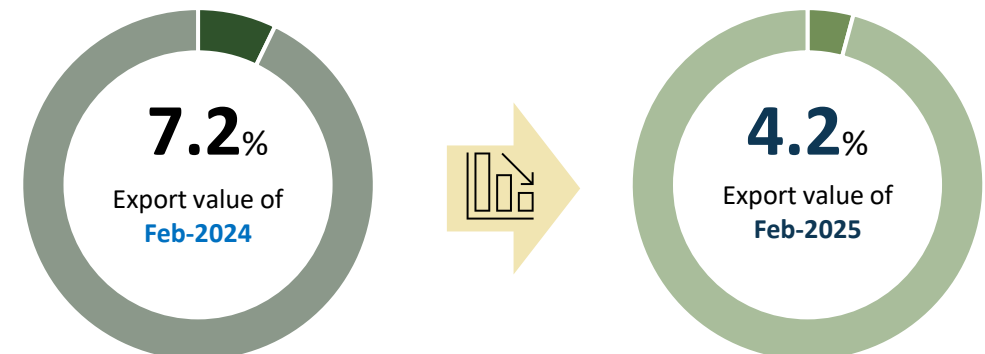
↓ **3.2 thousand tons** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **8.3 thousand tons**, **8.3%** of total 2024

Percentage of export value to the EU, Feb-2025



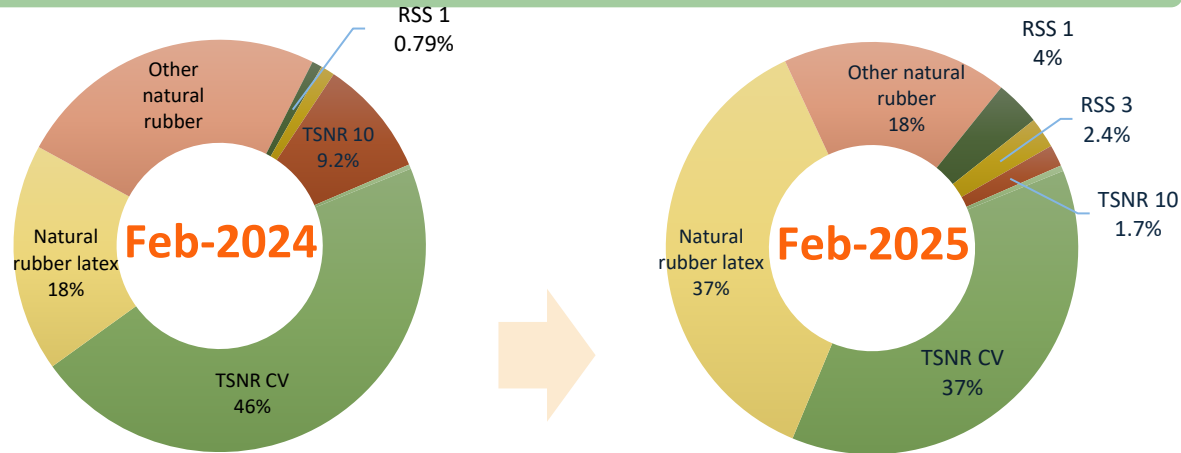
Changes in percentage of export value to the EU, Feb-2025



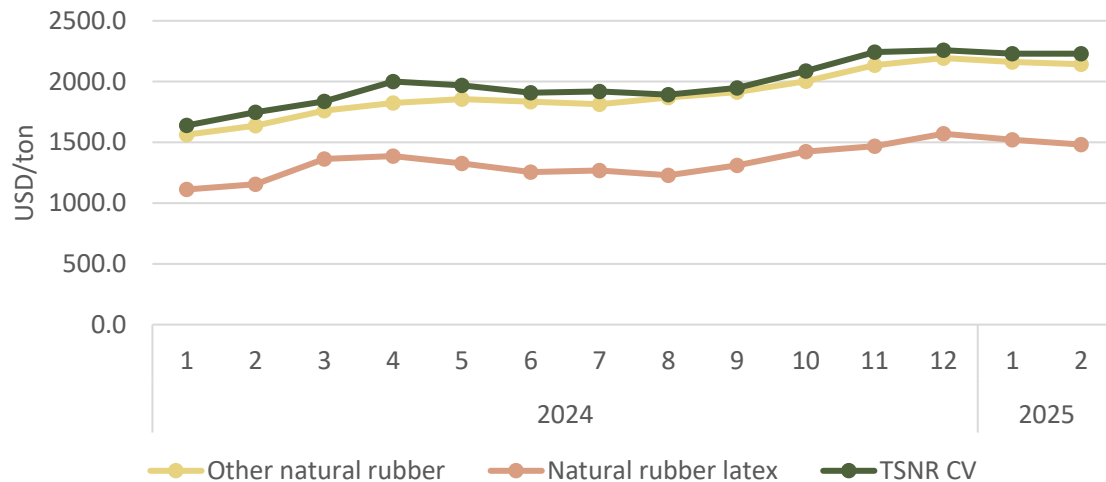


RUBBER

Structure of exports by products to the EU, Feb-2025



Average export price to the EU, Feb-2025



Export results to the EU, Feb-2025



Other natural rubber

Value: **1.7** mil. USD

Increase **21%** compared to Jan-25

Decrease **19%** compared to Feb-24



TSNR CV

Value: **3.5** mil. USD

Increase **125%** compared to Jan-25

Decrease **10%** compared to Feb-24



Natural rubber latex

Value: **3.5** mil. USD

Increase **110%** compared to Jan-25

Increase **129%** compared to Feb-24

Other natural rubber

The average export price in Feb-2025 is **2.141** USD/ton; decrease **0.9%** compared to the previous month; and increase **32%** compared to the same month of 2024.

TSNR CV

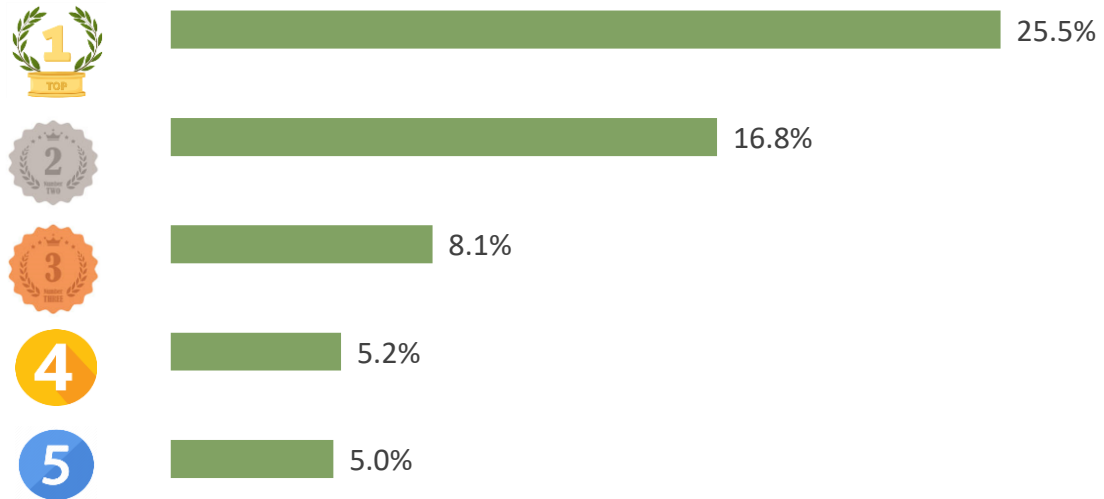
The average export price in Feb-2025 is **2.229** USD/ton; increase **0.03%** compared to the previous month; and increase **27%** compared to the same month of 2024.

Natural rubber latex

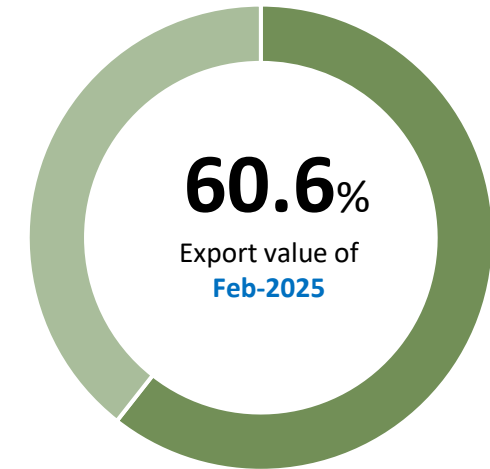
The average export price in Feb-2025 is **1.482** USD/ton; decrease **2.6%** compared to the previous month; and increase **27%** compared to the same month of 2024.



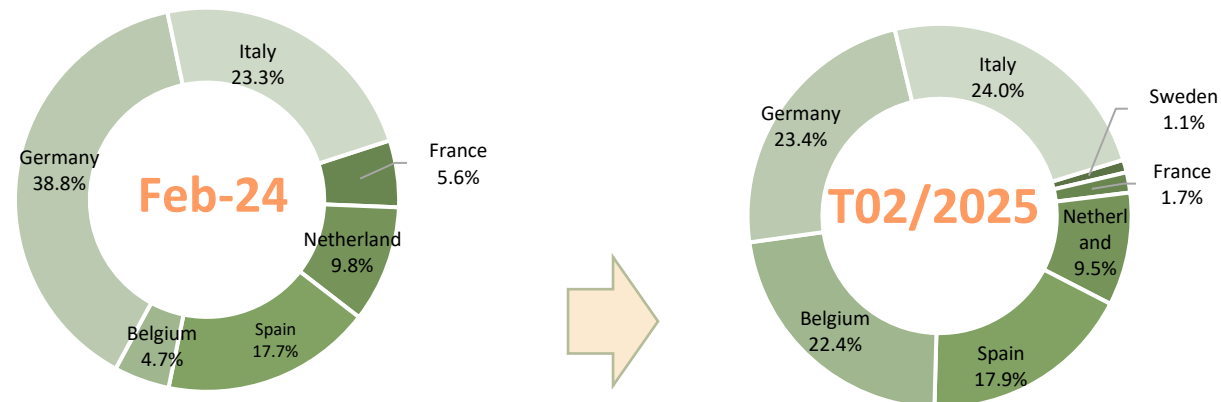
TOP 5 export enterprises by value to the EU, Feb-2025



Value ratio of TOP 5 export enterprises to the EU, Feb-2025



Changes in percentage of export value by countries, Feb-2025



SPOTLIGHTS



The workshop on "Promoting Sustainable Rubber Production, Trade, and Investment in Cambodia and Vietnam" was organized on March 27, 2025, in Cambodia by Forest Trends, the Vietnam Rubber Association (VRA), Oxfam, and the General Directorate of Rubber of Cambodia. The objective of the workshop was to enhance understanding of the rubber sector, discussing legal risks, and addressing sustainability issues within the rubber supply chain between the two countries. In the context of the EU tightening regulations on deforestation-free rubber imports (EUDR), the rubber supply chain has become more complex and challenging to trace. Vietnam is collaborating with Cambodia and international organizations to improve the supply chain, increase transparency, and help the rubber sector meet international regulations, thereby expanding export opportunities to the EU.

Source: vneconomy.vn



The Sustainable Natural Rubber Initiative in Lampung Province, Indonesia, is part of the Sustainable Agriculture for Forest Ecosystems (SAFE) project, funded by the European Union, BMZ, and the Dutch Ministry of Foreign Affairs. This initiative aims to enhance the competitiveness, sustainability, and market integration for smallholder rubber farmers, while also striving to meet the standards for deforestation-free rubber production. This funding program helps to increase the productivity of the rubber sector in Lampung, comply with the EUDR regulations, and expand market opportunities.

Source: olamagri.com



For feedback, please send to:

**Center for Information and Services in Agriculture and Environment
(AGREINFOS)**

Institute of Strategy and Policy on Agriculture and Environment

Address: *16 Thuy Khue, Thuy Khue Ward, Tay Ho District, Hanoi*

Email: thongtinhitruong@ipsard.gov.vn; info@agro.gov.vn

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

