

INSTITUTE OF STRATEGY AND POLICY
ON AGRICULTURE AND ENVIRONMENT

Volume: Mar-2025

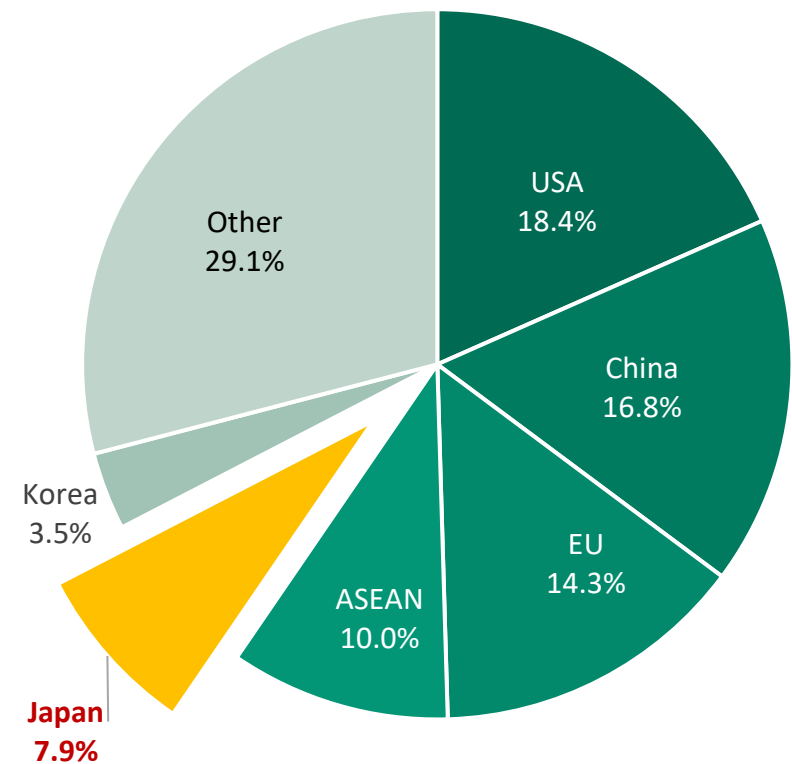
MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

FROM VIETNAM TO JAPAN MARKET

Prepared by: CENTER FOR INFORMATION AND SERVICES IN
AGRICULTURE AND ENVIRONMENT

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

Share of AFF product export to Japan in Feb-2025



Changes in the share of AFF product export to Japan in Feb-2025 compared to Jan-2025 and Feb-2024

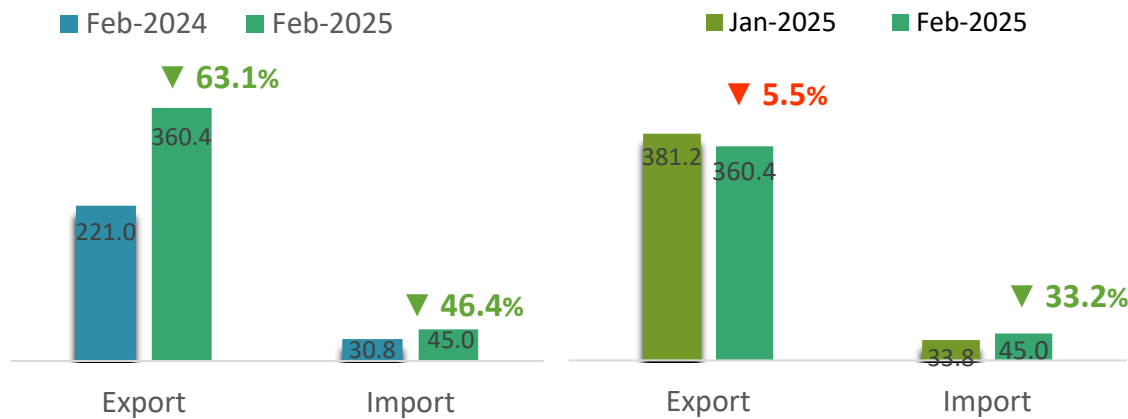
Market	Export value (million USD)	Compared to Jan-2025	Compared to Feb-2024
USA	842	▼ 3.6%	▲ 0.7%
China	770	▼ 1.0%	▼ 2.2%
EU	657	▲ 2.1%	▲ 2.5%
ASEAN	459	▲ 1.8%	▼ 3.7%
Japan	360	▲ 0.2%	▲ 1.2%
Republic of Korea	162	▼ 0.5%	▼ 0.1%
Total export	4,581		

Source: Calculated from data of the Department of Customs

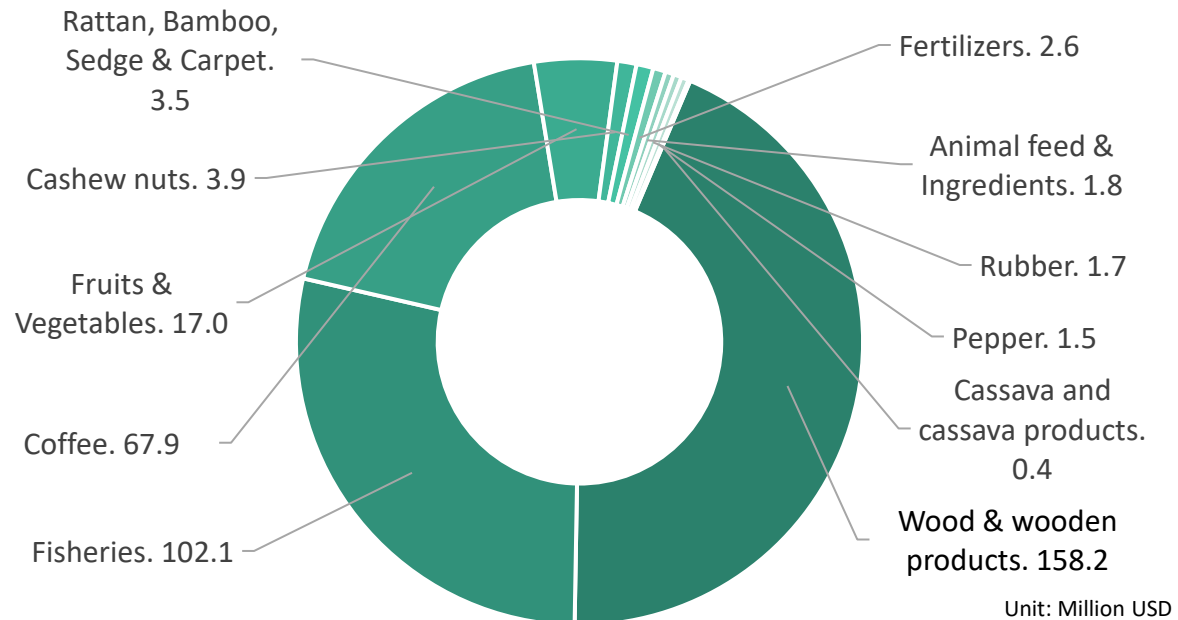
THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO JAPAN IN FEBRUARY 2025

Unit: Million USD

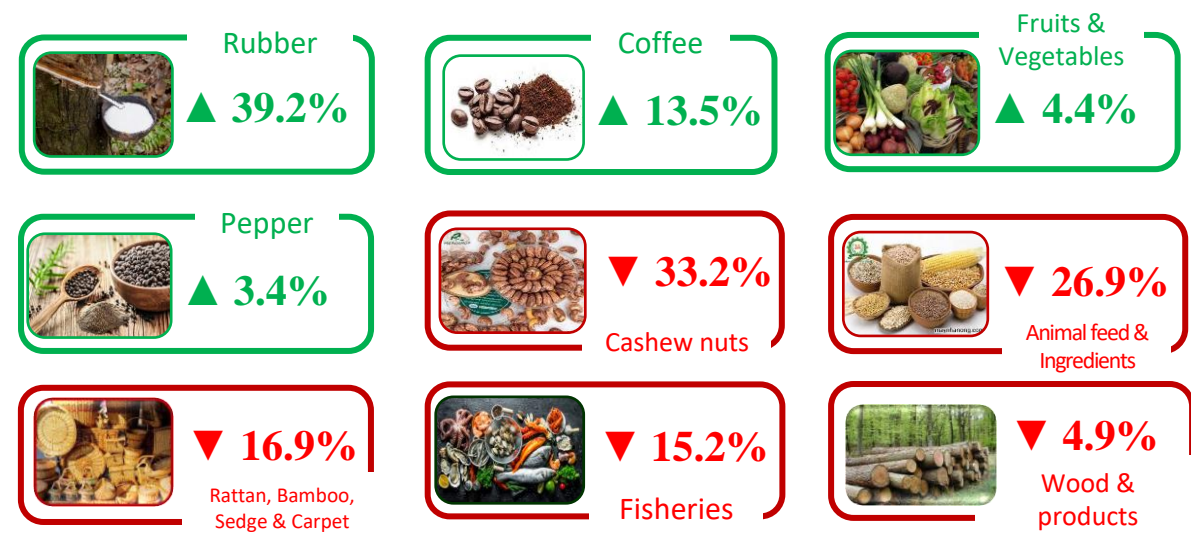
AFF product import-export value between Viet Nam and Japan, Feb-2025



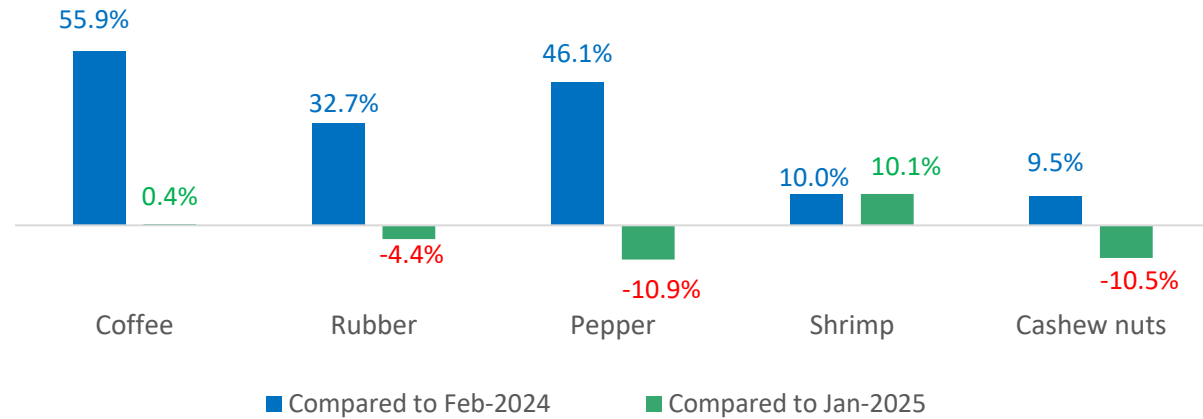
Key AFF product export value to Japan, Feb-2025



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



Changes in key AFF product export value to Japan in Feb-2025 compared to Jan-2025 and compared to Feb-2024



Source: Calculated from data of the Department of Customs

Japan achieved high trade surplus in February 2025

According to Japan's Ministry of Finance, in February, export value reached over 9,191 billion yen (about 61.7 billion USD), up 11.4% over the same period last year. This is the 5th consecutive month that Japan's export value maintained its growth momentum.

The main reason is the sudden increase in exports to the United States, as Japanese businesses stepped up exports to this market

before the protectionist tariff policy imposed by President Donald Trump's administration took effect.

Meanwhile, import value was about 8,606.6 billion yen (about 57.7 billion USD), down 0.7% over the same period last year.

Japan's trade surplus in February reached 584.5 billion Yen (about 4 billion USD). This is the first time in 2 months that Japan regained its trade surplus.



Source: vov.vn

Japan responds to new tariffs from the United States

During a press conference in Washington on March 10, Japan's Trade Minister asked the United States to exempt tariffs on Japanese goods, especially the 25% tariff on steel and aluminum, but there is no assurance from the United States.

Japan emphasizes its role as a close economic partner, has invested in the United States and

created many jobs, in order to persuade the US government not to impose new tariffs, especially on automobiles – the key export commodities of Japan. However, the United States still announced to impose a 25% tariff on imported cars from April 2, causing a great concern for the Japanese car industry.

In addition, Japan and the U.S. discussed on purchasing liquefied natural gas (LNG), the Alaska gas pipeline project, and proposed to buy U.S. Steel by Nippon Steel.



Source: baotintuc.vn





WOOD AND WOODEN PRODUCTS

Export value to Japan, Feb-2025



Export results to Japan, Feb-2025



158

million USD

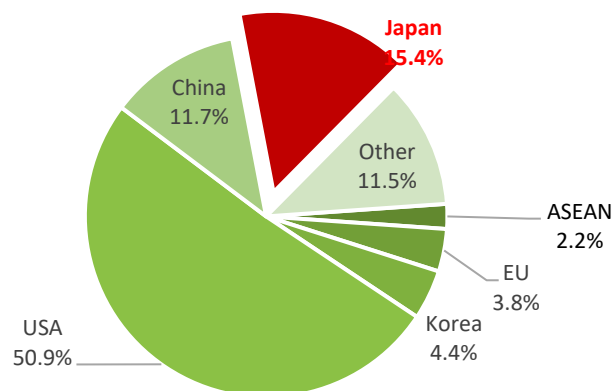
Decrease **4.9%** compared to Jan-2025

Increase **45.7%** compared to Feb-2024

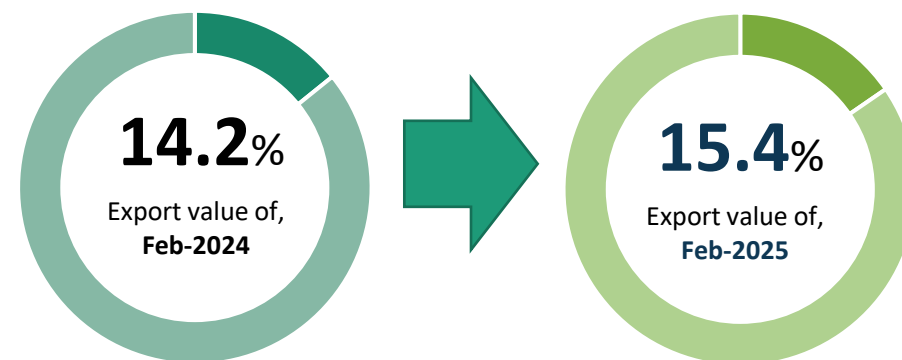
↑ **12.6 million USD** more than the monthly average rate in 2024

❖ Accumulated 02 months of 2025 reaches **324.4** million USD, **18.6%** of total 2024

Percentage of export value to Japan, Feb-2025



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





WOOD AND WOODEN PRODUCTS

Structure of exports by products to Japan, Feb-2025



Export results to Japan, Feb-2025



Wood chips

Value: **112** million USD

Increase **1%** compared to Jan-2025

Increase **49%** compared to Feb-2024



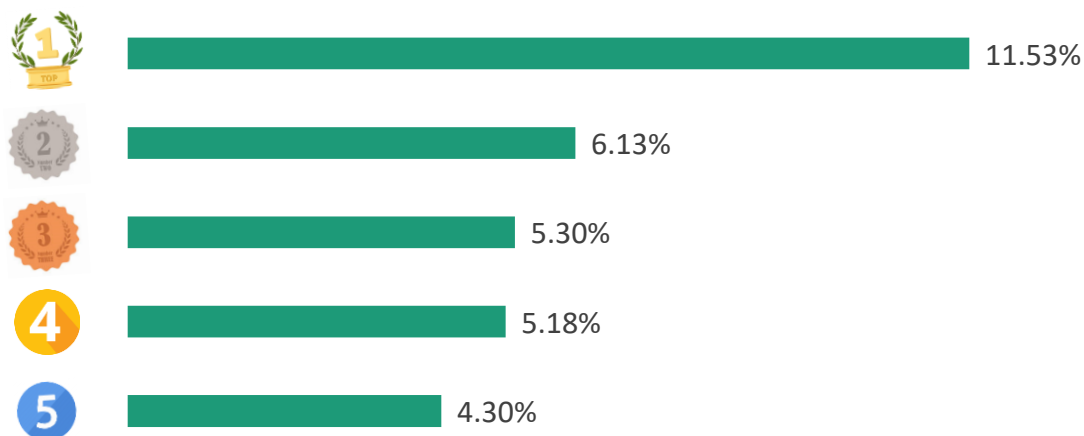
Plywood

Value: **5.8** million USD

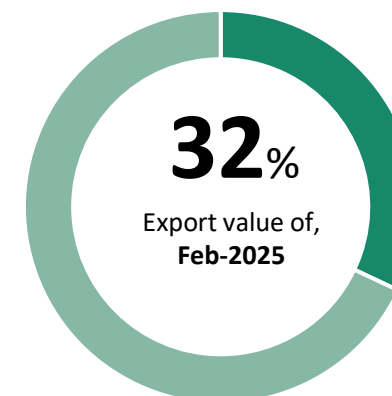
Decrease **32%** compared to Jan-2025

Increase **63%** compared to Feb-2024

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



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



WOOD AND WOODEN PRODUCTS



SPOTLIGHTS

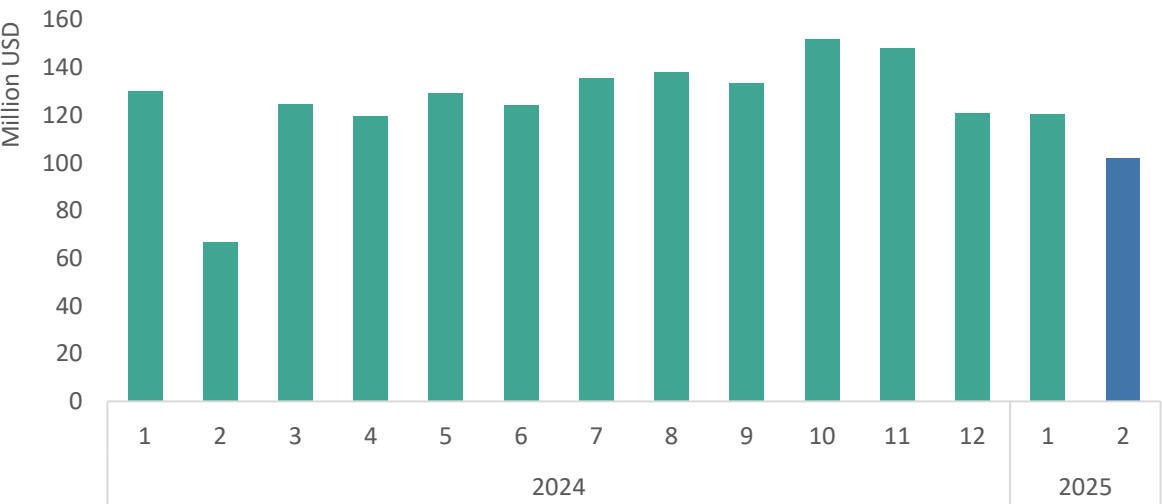
From the third quarter of 2024 to January 2025, the import value of Japan's furniture had continuously increased, mainly due to the weakening of the Yen leading to high import costs. The furniture imports from China account for 93% of the imported office furniture on January 2025.

For kitchen furniture, Philippines and Vietnam play the role of key suppliers, accounting for more than 70% of the total import value. Meanwhile, China and Vietnam are the two main sources of bedroom furniture.



FISHERIES

Export value to Japan, Feb-2025



Export results to Japan, Feb-2025

VALUE

120.3 *million USD*

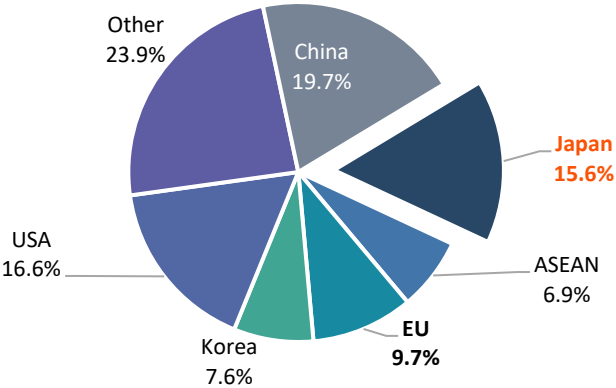
Decrease **15.2%** compared to Jan-2025

Increase **53.2%** compared to Feb-2024

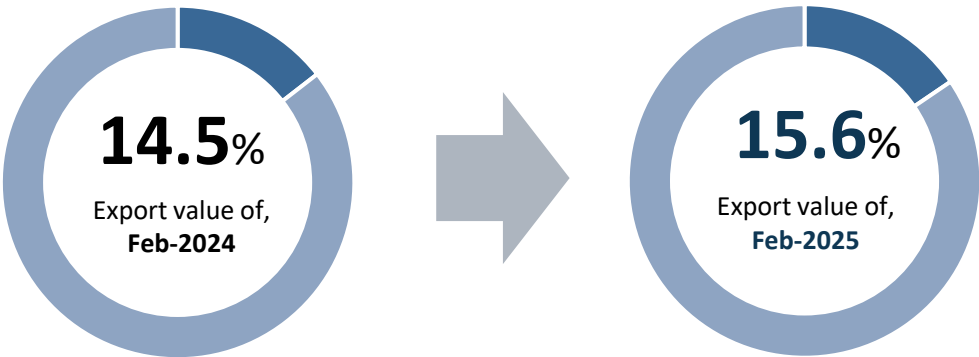
24.8 million USD less than the monthly average rate in 2024

❖ Accumulated 02 months of 2025 reaches **222.4** million USD, **14.6%** of total 2024

Percentage of export value to Japan, Feb-2025



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

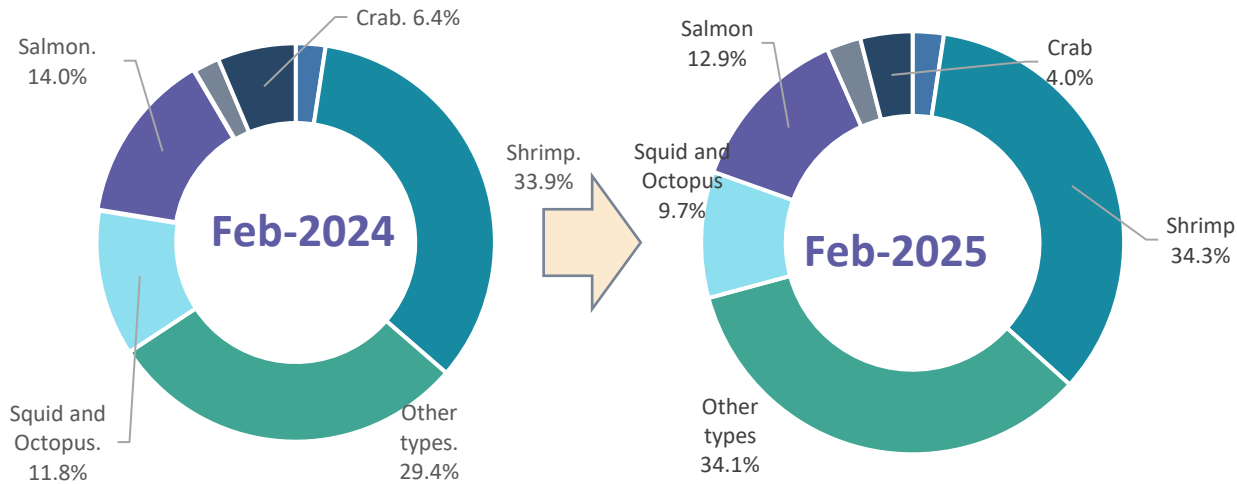


Source: Calculated from data of the Department of Customs

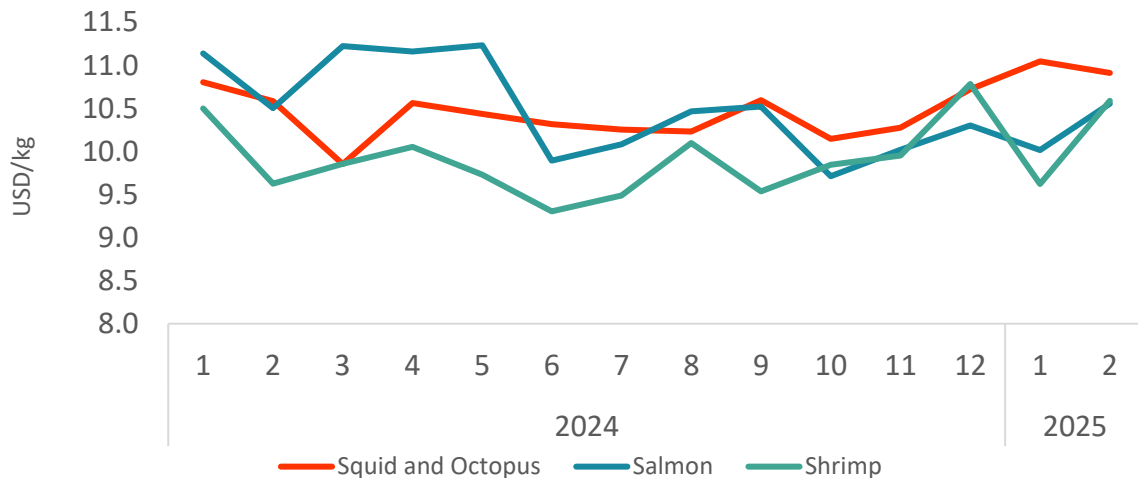


FISHERIES

Structure of exports by products to Japan, Feb-2025



Average export fisheries price to Japan, Feb-2025



Export results to Japan, Feb-2025



Salmon

Value: **13.2** million USD

Decrease **27.4%** compared to Jan-2025

Increase **41.7%** compared to Feb-2024



Shrimp

Value: **35.0** million USD

Increase **2.5%** compared to Jan-2025

Increase **54.6%** compared to Feb-2024



Squid and Octopus

Value: **9.9** million USD

Decrease **29.8%** compared to Jan-2025

Increase **25.0%** compared to Feb-2024

Squid and Octopus

The average export price in Feb-2025 is **10.9** USD/kg; decrease **1.2%** compared to previous month; and increase **3.1%** compared to the same month of 2024.

Salmon

The average export price in Feb-2025 is **10.6** USD/kg; increase **5.4%** compared to previous month; and increase **0.5%** compared to the same month of 2024.

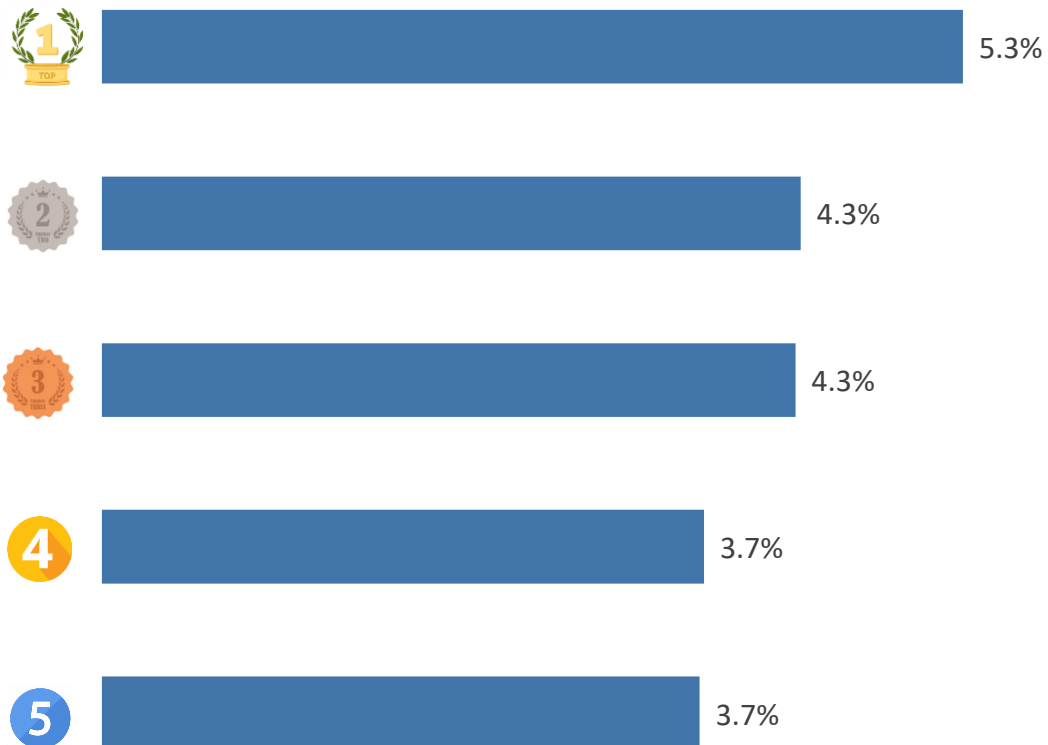
Shrimp

The average export price in Feb-2025 is **10.6** USD/kg; increase **10.1%** compared to previous month; and increase **10.0%** compared to the same month of 2024.

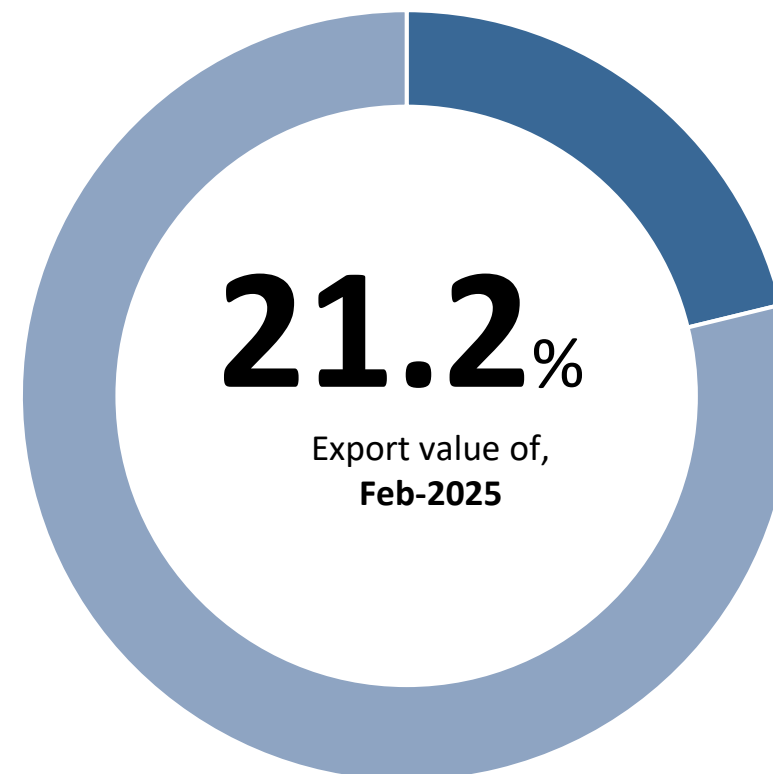


FISHERIES

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



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



China's ban on Japanese seafood may be eased

During a meeting with senior Japanese politicians in Tokyo on Sunday (March 23, 2025), Chinese Foreign Minister – Mr. Wang Yi said that Beijing's restriction on importing Japanese seafood could make progress in the near future. He stated that China will release the latest analysis of the treated and diluted water discharged from the Fukushima Daiichi nuclear power plant. This analysis was carried out under the coordination of the International Atomic Energy Agency (IAEA).

If the analysis results do not find any problems, China will accelerate the process of lifting the ban on seafood imports from Japan. However, Mr. Wang did not specify the timeline or specific details. China has completely suspended seafood imports from Japan since August 2023, when Japan began discharging treated water from the Fukushima nuclear power plant to the sea.

Source: NHK World Japan (March 2025)



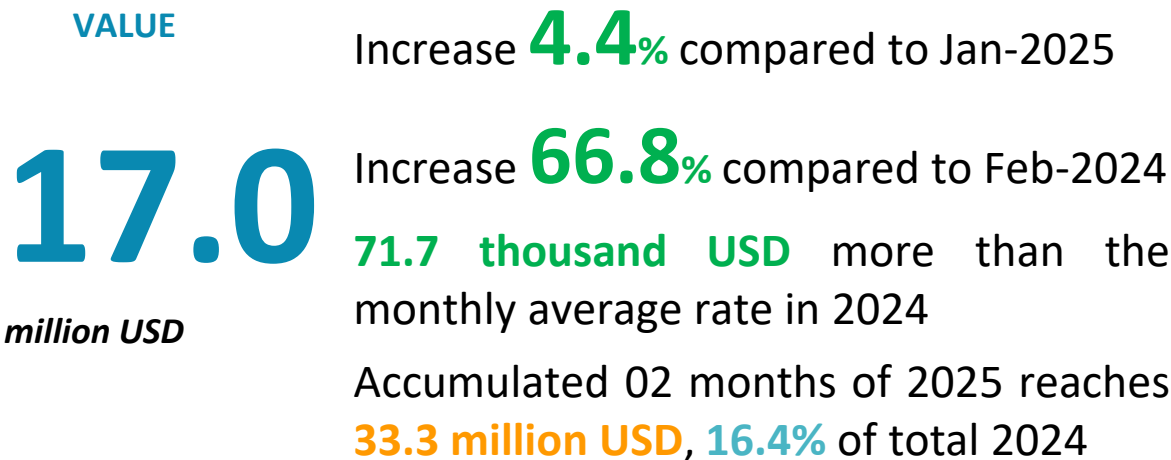


FRUITS & VEGETABLES (EXPORT)

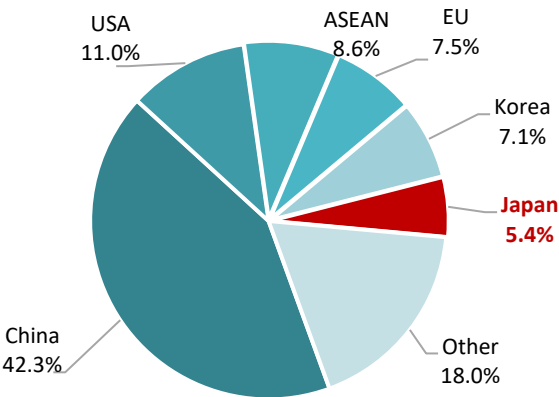
Export value to Japan, Feb-2025



Export results to Japan, Feb-2025



Percentage of export value to Japan, Feb-2025



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

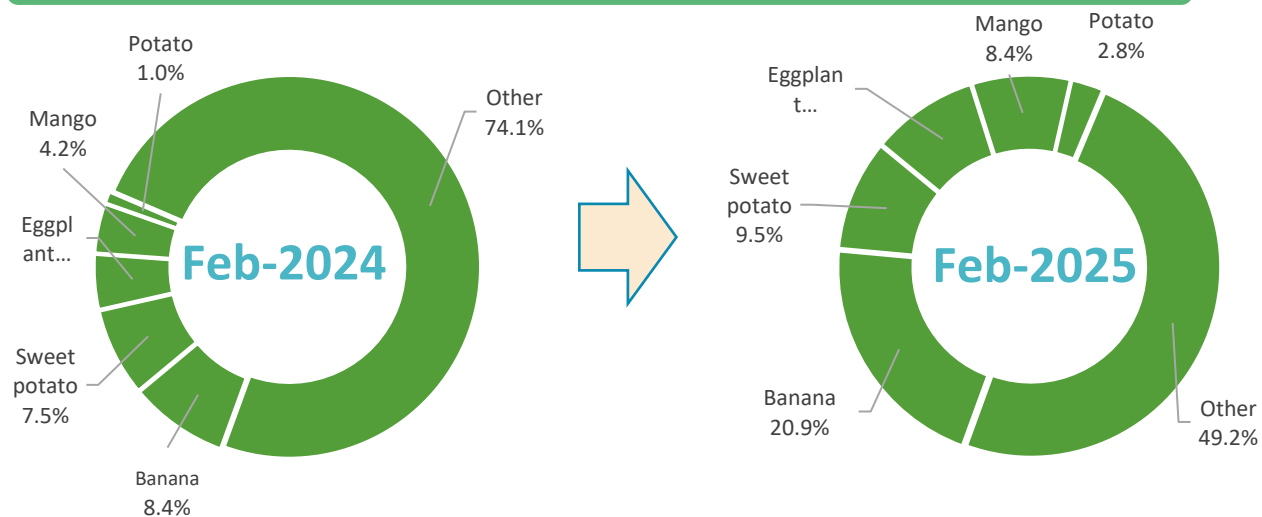


Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to Japan, Feb-2025



Sweet potato

Value: **1.6** million USD
Decrease **2.6%** compared to Jan-2025
Increase **27.4%** compared to Feb-2024



Eggplant

Value: **1.6** million USD
Increase **100.2%** compared to Jan-2025
Increase **95.6%** so compared to Feb-2024

Export results to Japan, Feb-2025



Banana

Value: **3.6** million USD
Increase **1.1%** compared to Jan-2025
Increase **150.3%** compared to Feb-2024



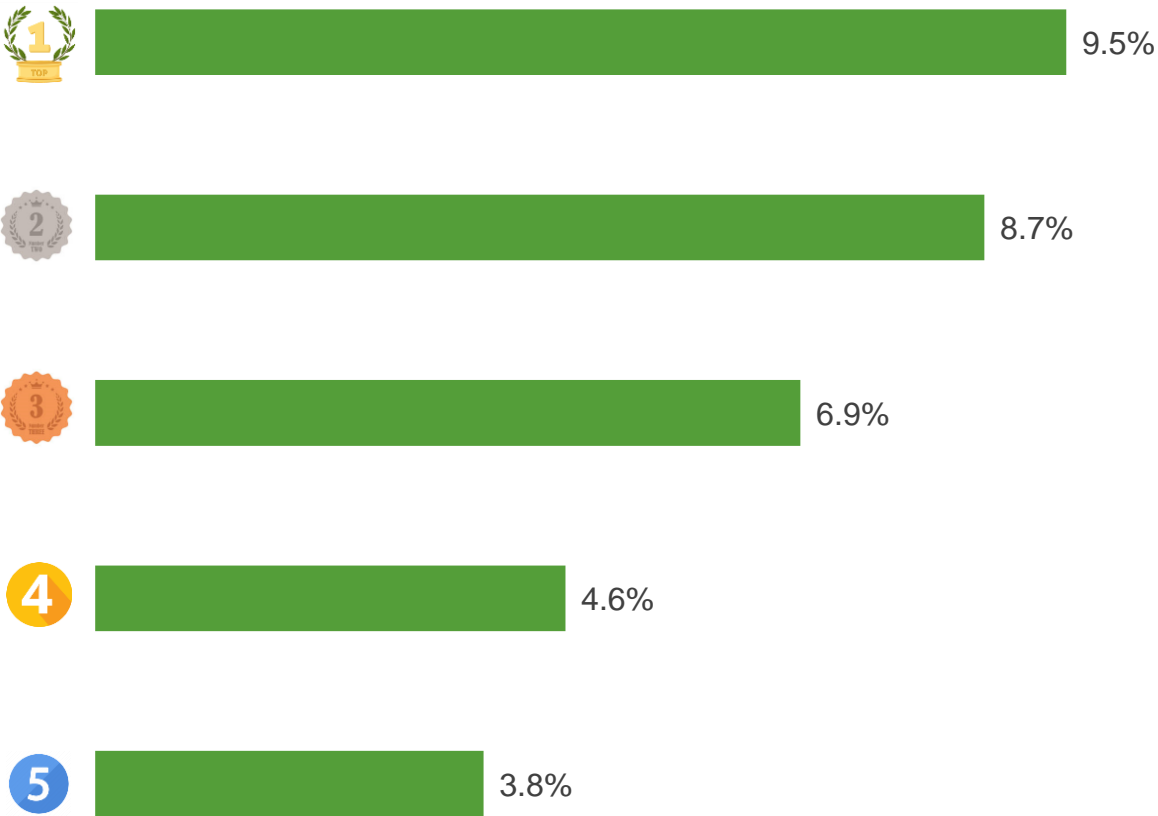
Mango

Value: **1.4** million USD
Increase **6.8%** compared to Jan-2025
Increase **99.7%** compared to Feb-2024

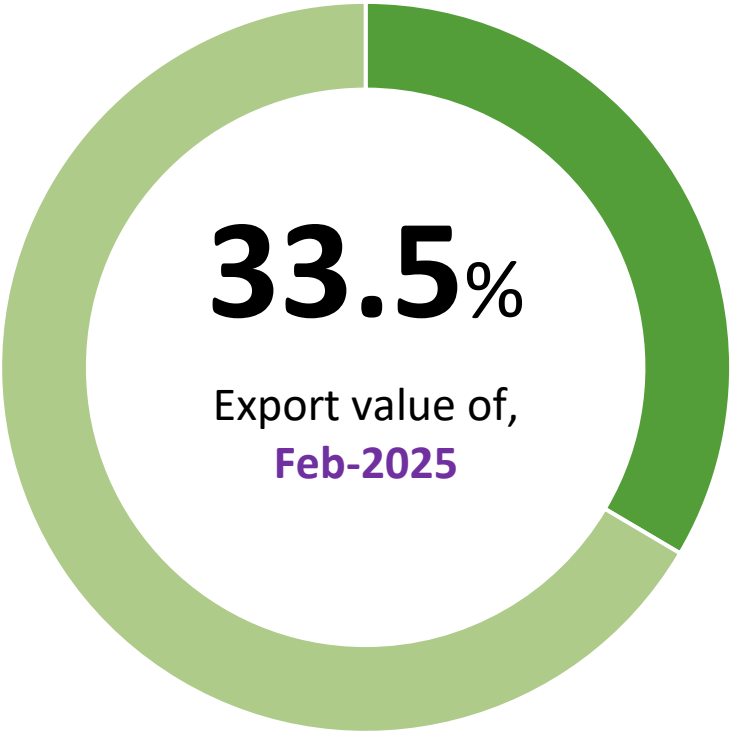


FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to
thị trường Nhật Bản. Feb-2025



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

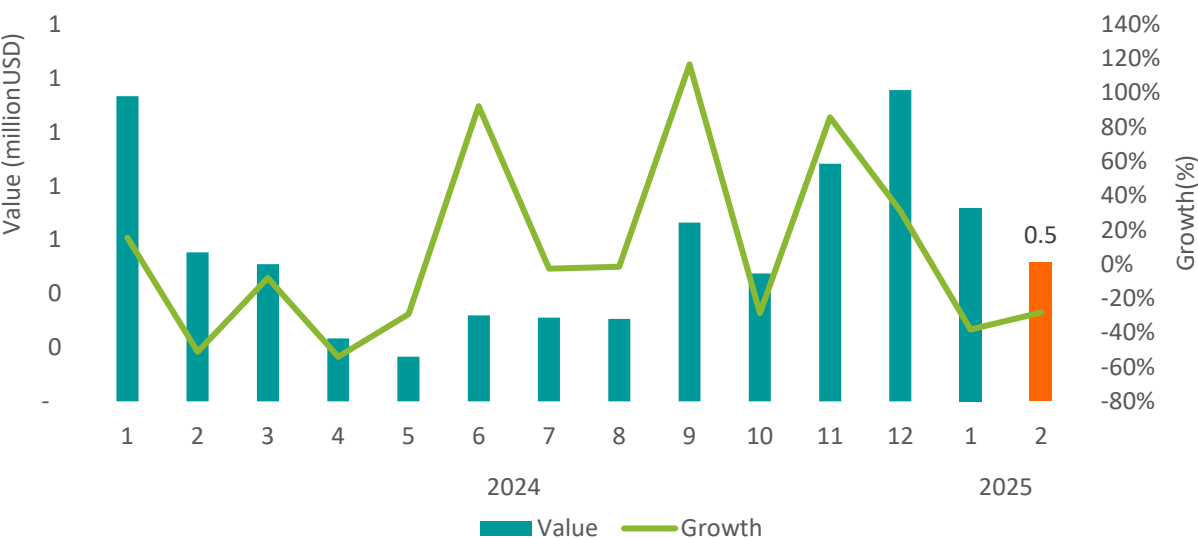


Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Import value from Japan, Feb-2025



Import results from Japan, Feb-2025



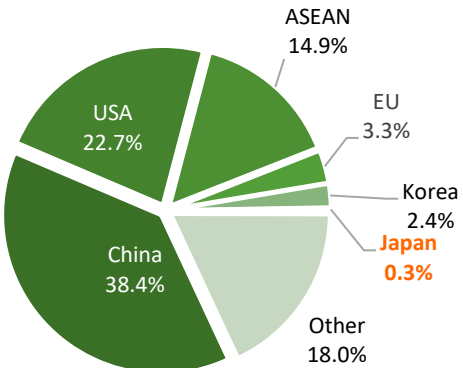
Decrease **28.1%** compared to Jan-2025

Decrease **6.7%** compared to Feb-2024

43.4 thousand USD less than the monthly average rate in 2024

Accumulated 02 months of 2025 reaches **1.2 million USD**, **18.4%** of total 2024

Percentage of import value from Japan, Feb-2025



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



Source: Calculated from data of the Department of Customs



More than 500 thousand VND per Japanese strawberry

Elly Amai strawberries, imported from Kyoto (Japan), became the latest item to be priced at luxury grocery chain Erewhon in Los Angeles. With a price of more than 500 thousand VND per unit, this is a high-quality strawberry in Japan, has the highest price and the most popular strawberry because it does not have any sour or astringent taste. These organic strawberries account for only 0.002% of Japan's production. Each berry is planted in the special conditions to achieve perfect proportions, vibrant colors, and standard sizes.

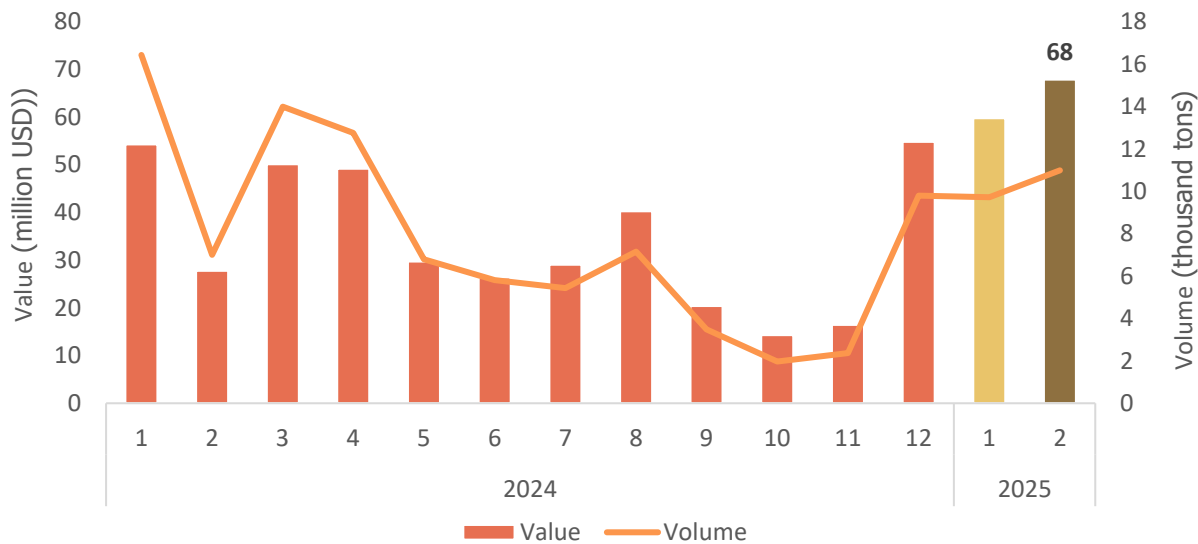
Source: Nhk.or.jp



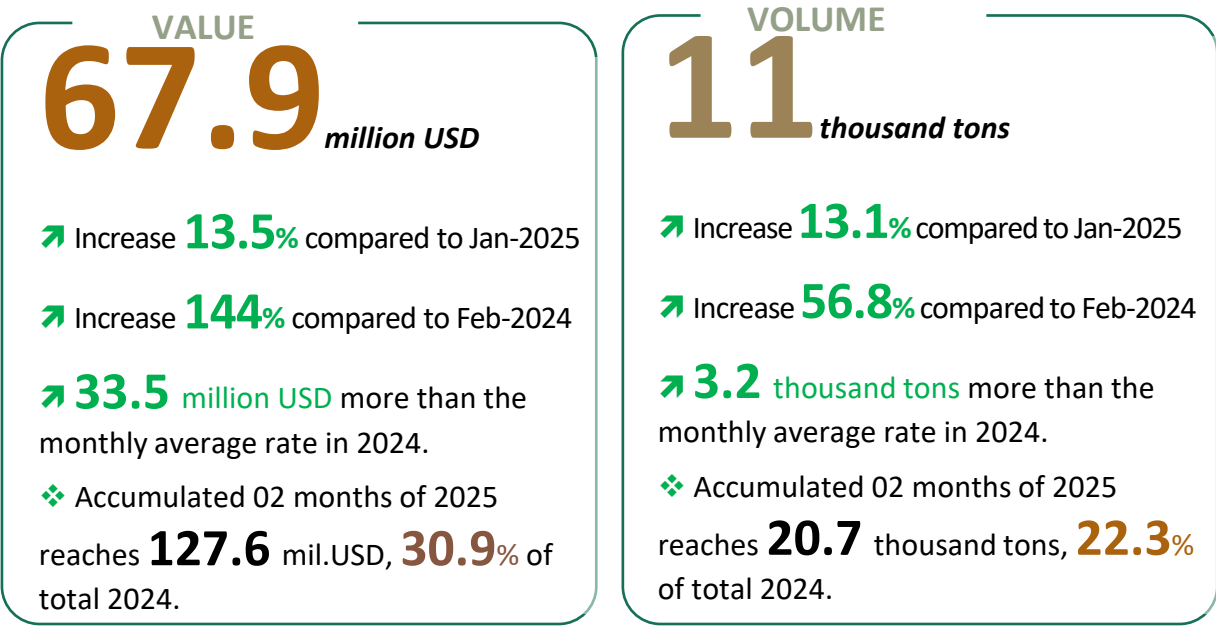


COFFEE

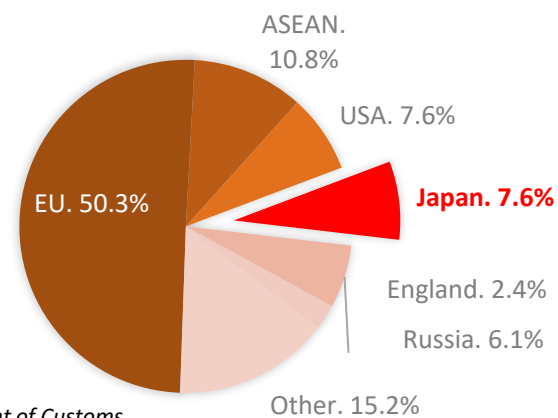
Export volume and value to Japan, Feb-2025



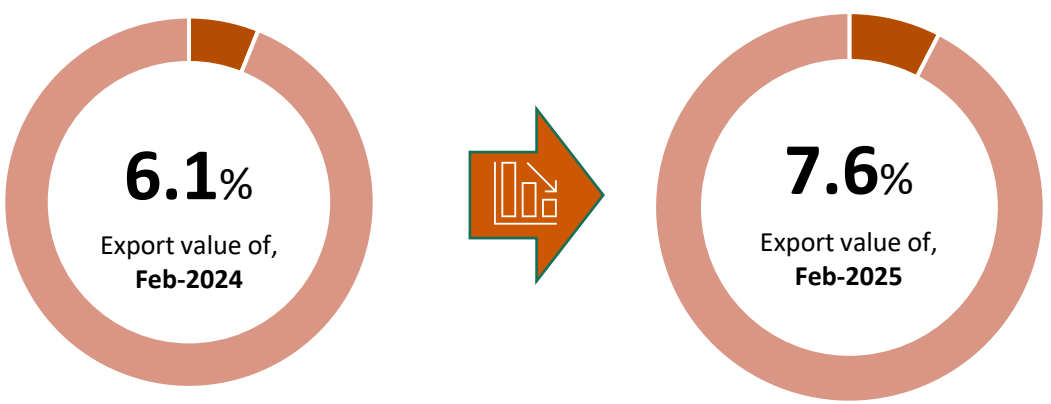
Export results to sang Japan, Feb-2025



Percentage of export value to Japan, Feb-2025



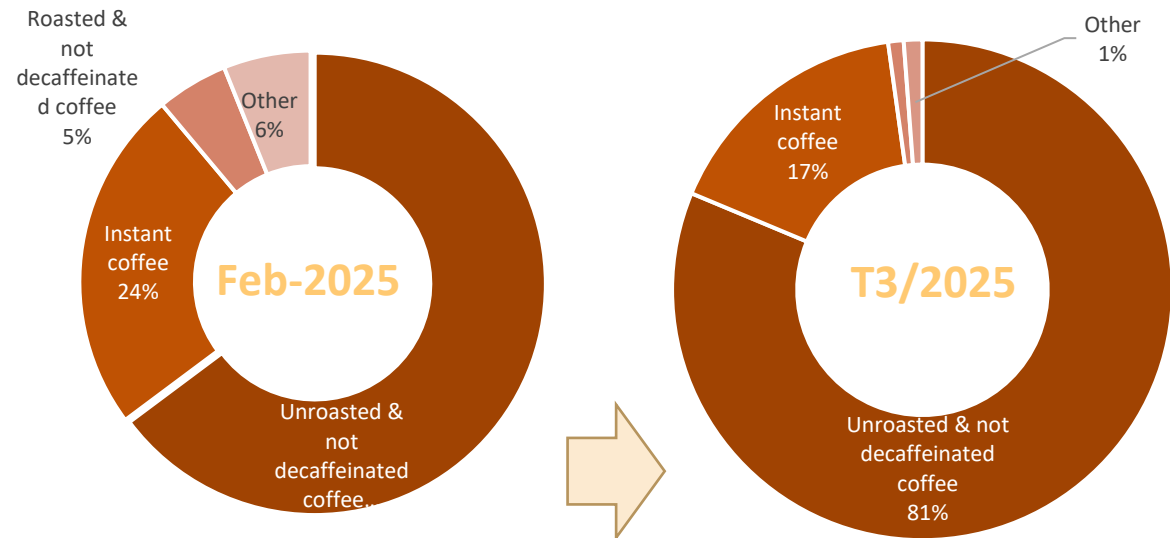
Changes in percentage of export value to Japan, Feb-2025



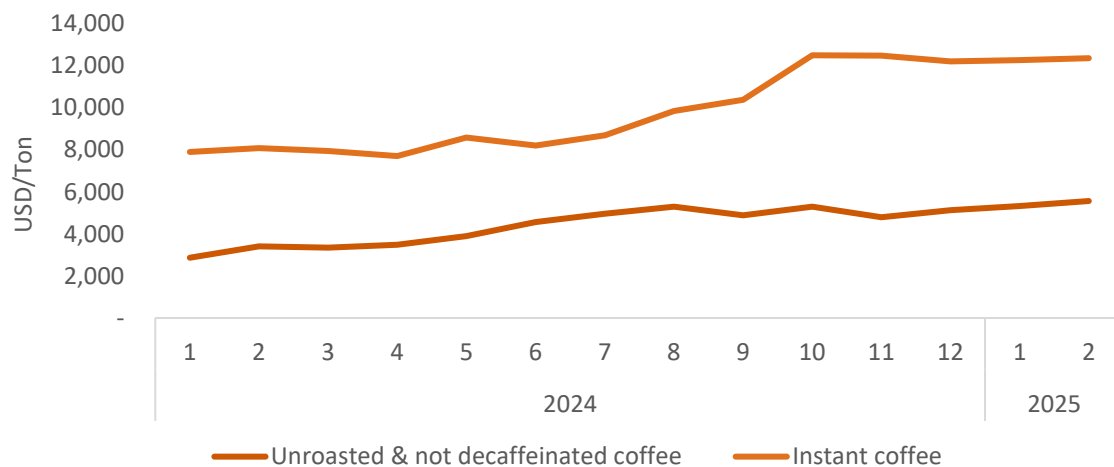
Source: Calculated from data of the Department of Customs

COFFEE

Structure of exports by products to Japan, Feb-2025



Average export coffee price to Japan, Feb-2025



Export results to Japan, Feb-2025



Unroasted & not decaffeinated coffee

Value: **55.1** million USD
 Increase **35.4%** compared to Jan-2025
 Increase **216%** compared to Feb-2024



Instant coffee

Value: **11.2** million USD
 Decrease **18.7%** so compared to Jan-2025
 Increase **72.7%** compared to Feb-2024



Roasted & not decaffeinated coffee

Value: **0.2** million USD
 Decrease **69.8%** compared to Jan-2025
 Increase **26.9%** compared to Feb-2024

Instant coffee

The average export price in Feb-2025 is **12.352** USD/ton; increase **0.7%** compared to previous month; and increase **53.2%** compared to the same month of 2024.

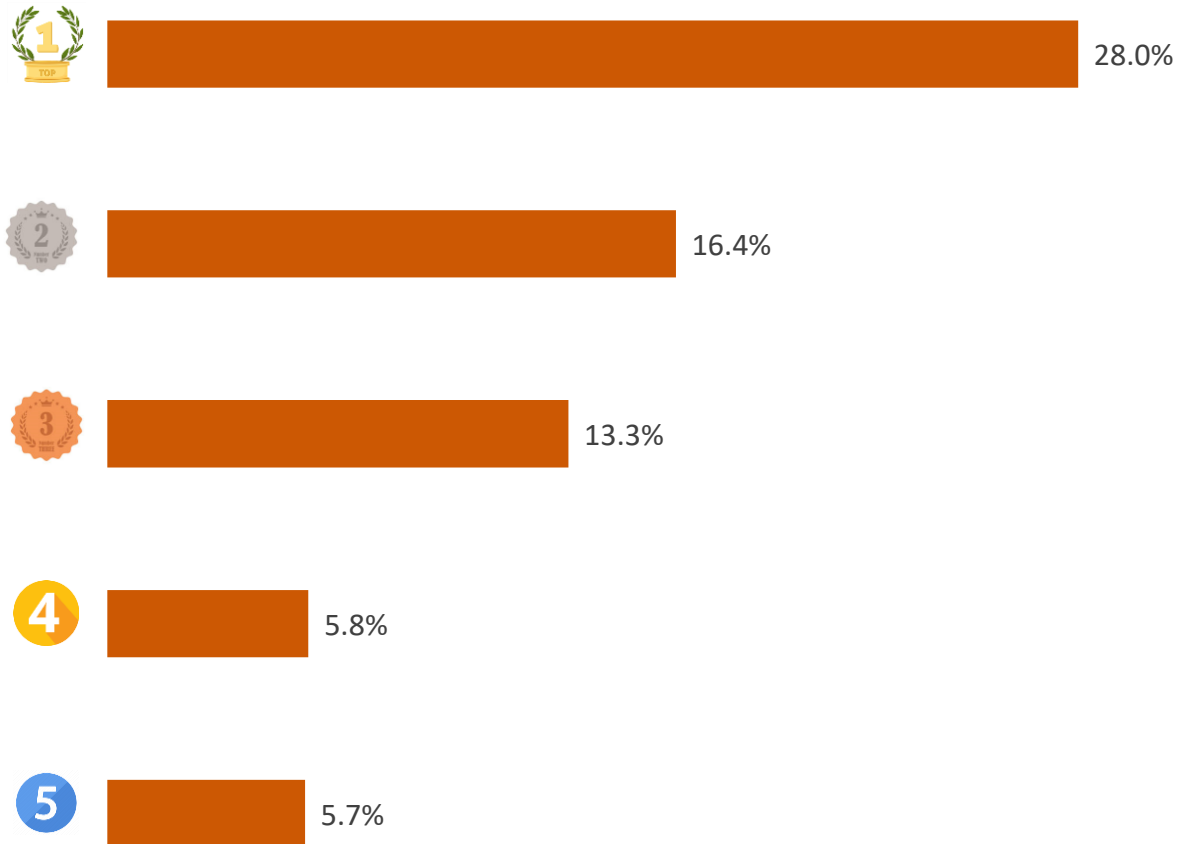
Unroasted & not decaffeinated coffee

The average export price in Feb-2025 is **5.558** USD/ton; increase **4.3%** compared to previous month; and increase **63.4%** compared to the same month of 2024.

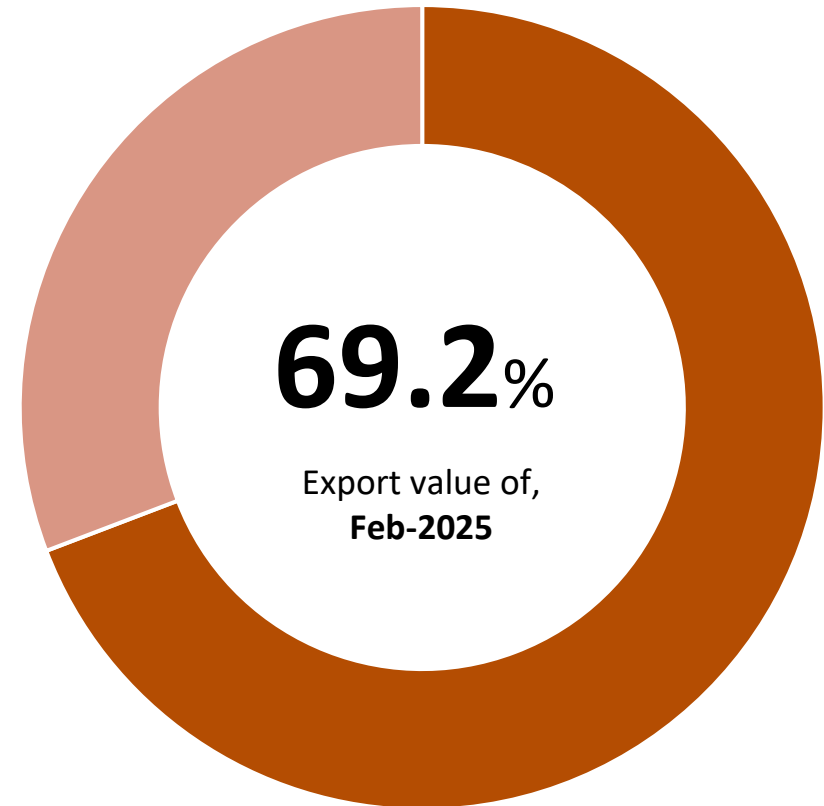


COFFEE

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



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





In the first month of 2025, Japan imports 29.6 thousand tons coffee, with value of 179.3 million USD, down 10.0% in volume, but up 51.8% in value compared to January 2024.

In January 2025, the average import price of coffee was 6,065 USD/ton, increasing 4.5% compared to December 2024 and 68.6% compared to January 2024. Of which, the average price of coffee imports from Vietnam increased with the highest level - 106.2% compared to January 2024, to 5,771 USD/ton. Japan imports coffee from 43 countries and territories around the world. In particular, Japan increased imports from Brazil, Ethiopia, Tanzania and decreased imports from Vietnam and Colombia.

Japan's coffee consumption will grow at 0.47% per year in the period of 2025-2033 and increase from \$5.43 billion in 2024 to \$5.66 billion in 2033. The increase in coffee demand comes along with the development of specialty coffee shops, Japanese people are increasingly preferring high-end and convenient coffee products.





CASHEW NUTS

Export volume and value to Japan, Feb-2025



Export results to Japan, Feb-2025

VALUE
3.95 million USD

↘ Decrease **33.2%** compared to Jan-2025

↗ Increase **32.8%** compared to Feb-2024

↓ **9.86 million USD** less than the monthly average rate in 2024

❖ Accumulated 02 months of 2025 reaches **9.86 million USD**, **16%** of total 2024

VOLUME
599 tons

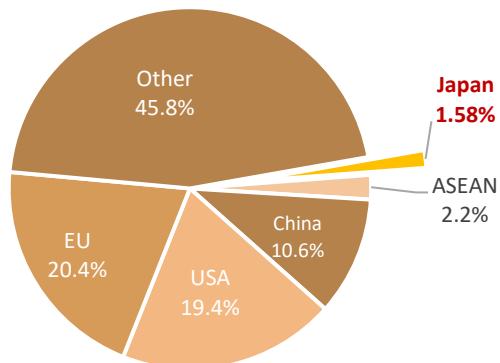
↘ Decrease **25.4%** compared to Jan-2025

↗ Increase **21.3%** compared to Feb-2024

↓ **241 tons** less than the monthly average rate in 2024

❖ Accumulated 02 months of 2025 reaches **1.4 thousand tons**, **14%** of total 2024

Percentage of export value to Japan, Feb-2025



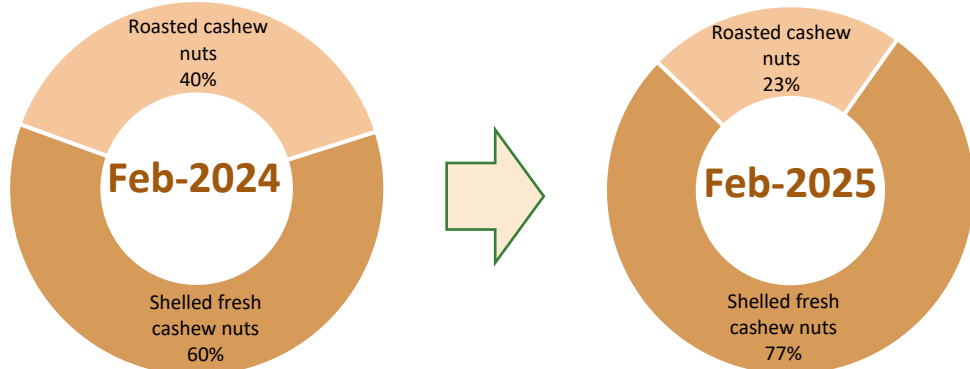
Changes in percentage of export value to Japan, Feb-2025



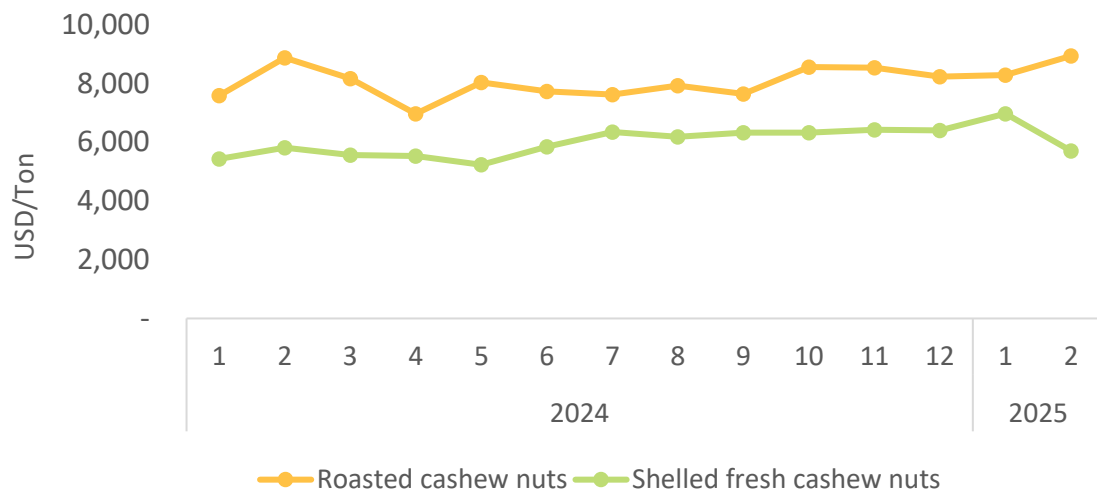


CASHEW NUTS

Structure of exports by products to Japan, Feb-2025



Average export cashew nuts price to Japan, Feb-2025



Export results to Japan, Feb-2025



Shelled fresh cashew nuts

Value: **3.06** million USD

Decrease **24%** compared to Jan-2025

Increase **72%** compared to Feb-2024



Roasted cashew nuts

Value: **0.89** million USD

Decrease **54%** compared to Jan-2025

Decrease **24%** compared to Feb-2024

Shelled fresh cashew nuts

The average export price in Feb-2025 is **5.696** USD/ton; decrease **18.2%** compared to previous month; and decrease **1.9%** compared to the same month of 2024.

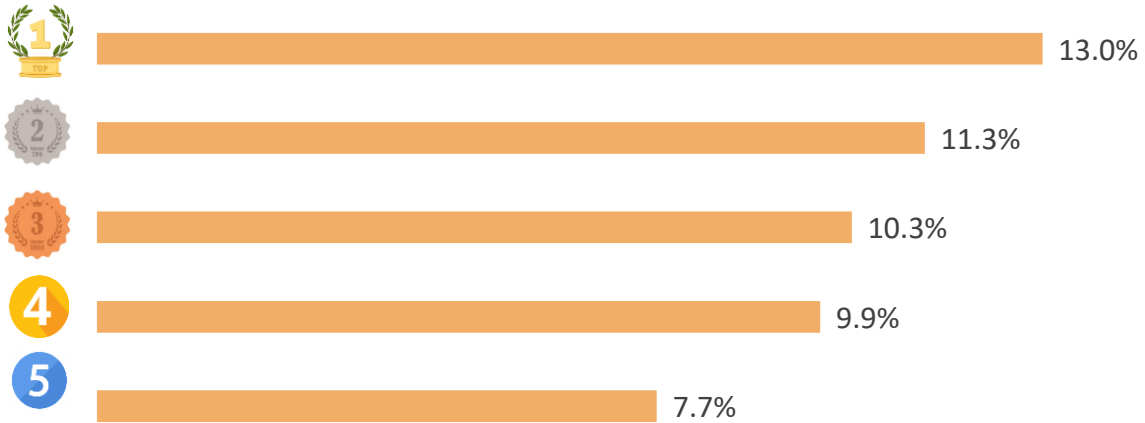
Roasted cashew nuts

The average export price in Feb-2025 is **8.924** USD/ton; increase **7.8%** compared to previous month; and increase **0.7%** compared to the same month of 2024.

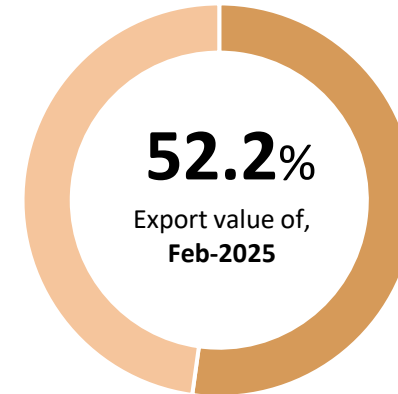


CASHEW NUTS

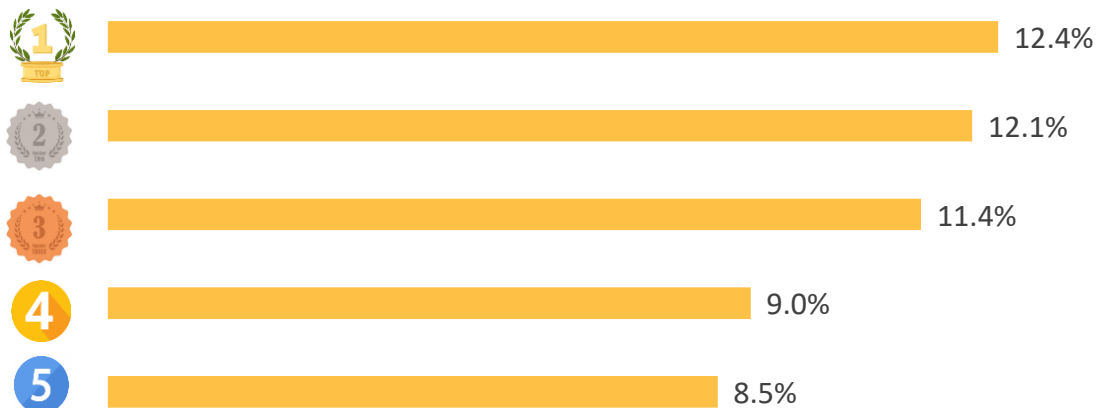
TOP 5 export enterprises by value to Japan, Feb-2025



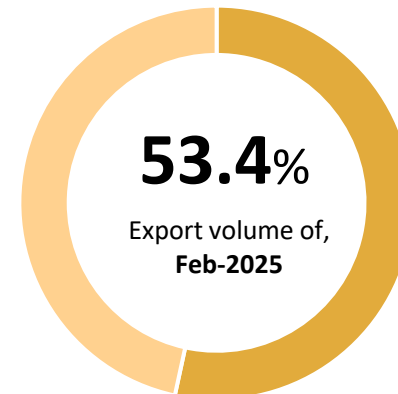
Value ratio of TOP 5 export enterprises to Japan, Feb-2025



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



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



CASHEW NUTS

SPOTLIGHTS



Japanese company signs contract to purchase 400 tons of cashew nuts from Cambodian agricultural cooperatives

On March 26, 2025, the Japanese company - MIRARTH Agri Tech Co., Ltd signed a contract to buy 400 tons of cashew nuts with three cooperatives in Kampong Thom province, Cambodia, with contract value of 650,000 USD. This is the first time that cooperatives sold cashews under fixed contracts at stable prices, the amount of cashews signed accounts for about 20% of the expected output in 2025.

At the signing ceremony, the Ministry of Agriculture of Cambodia highly appreciated the contract production model because it helps reduce the risk of price fluctuations for farmers. The Ministry encourages cooperatives signing contracts with enterprises in the next crop seasons, and preserving part of the product for sale in the form of dried cashew nuts.

Source: thmeythmey.com

Cambodia's Ministry of Trade surveys the cashew nut market in Japan

Within the framework of the business trip to prepare for the Osaka World Expo 2025, the Ministry of Trade of Cambodia organized a field survey at AEON Mall and two 7-Eleven convenience stores in Tokyo, Japan, to understand consumer trends and market access ability for Cambodian cashew nut products. The survey helps orient the strategy for expanding exports, improving product quality, strengthening the supply chain and developing international standard cashew nut brand. Japan is identified as a strategic market in the plan to access high-value markets.

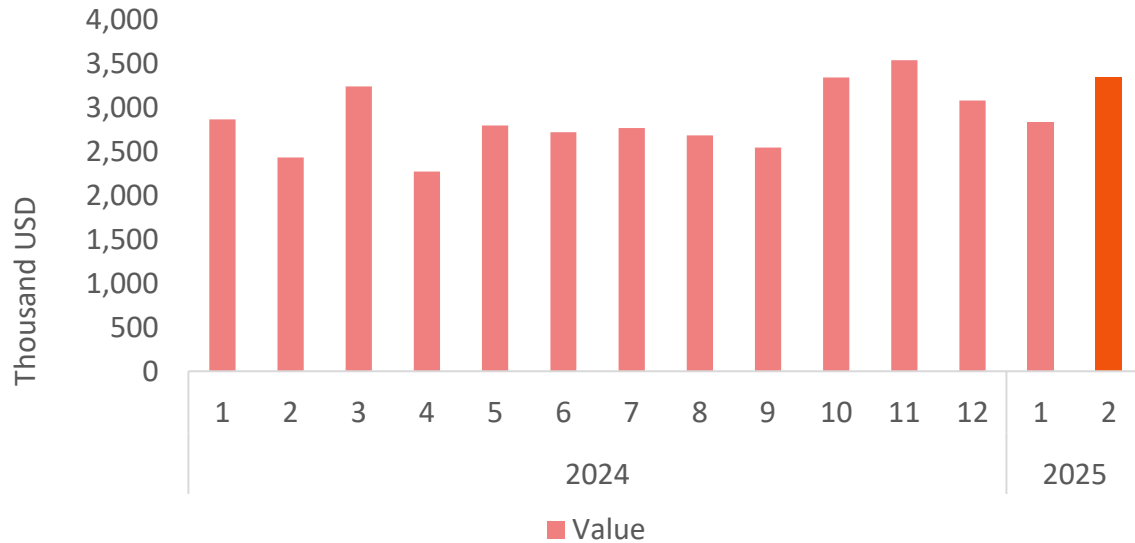
Source: mtaseav-today.com



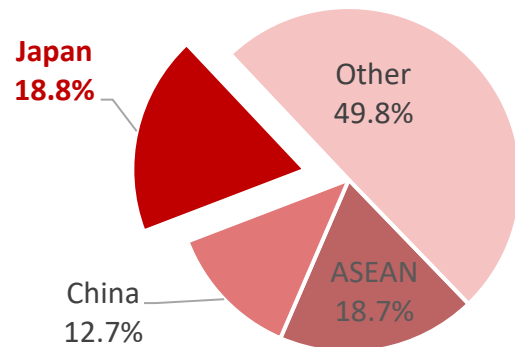


MEAT AND MEAT PRODUCTS (EXPORT)

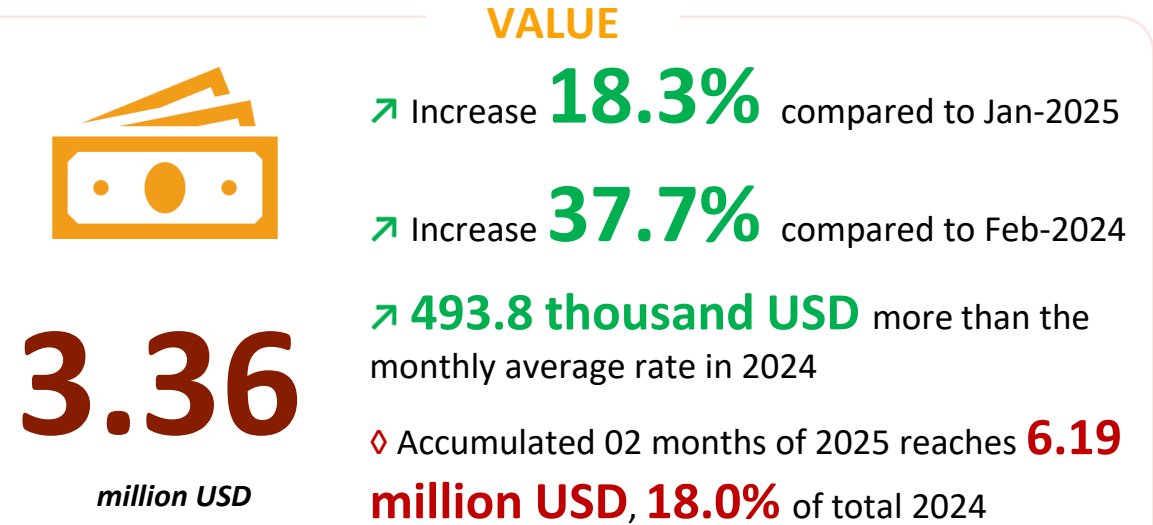
Export value to Japan, Feb-2025



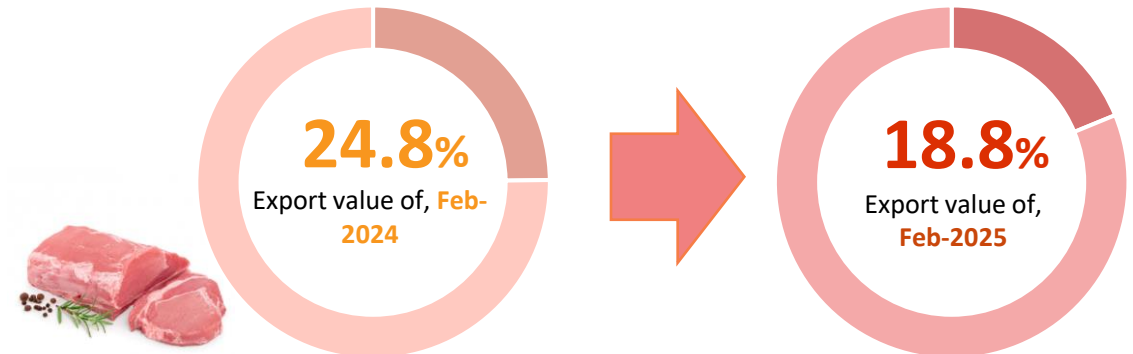
Percentage of export value to Japan, Feb-2025



Export results to Japan, Feb-2025



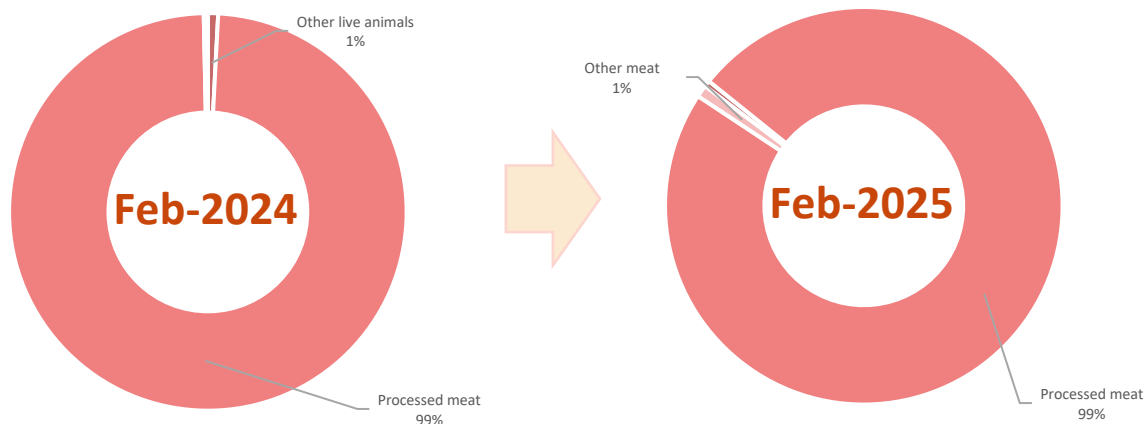
Changes in percentage of export value to Japan, Feb-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, Feb-2025



Export results to Japan, Feb-2025



Processed meat

Value: **3.3** million USD

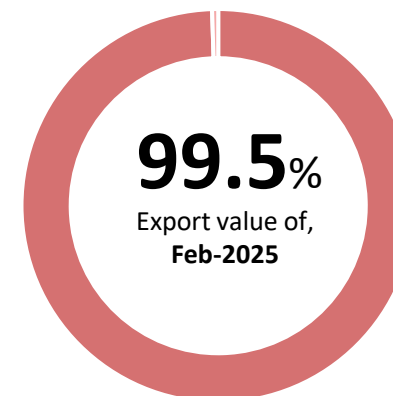
Increase **20.8%** compared to Jan-2025

Increase **37.2%** compared to Feb-2024

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



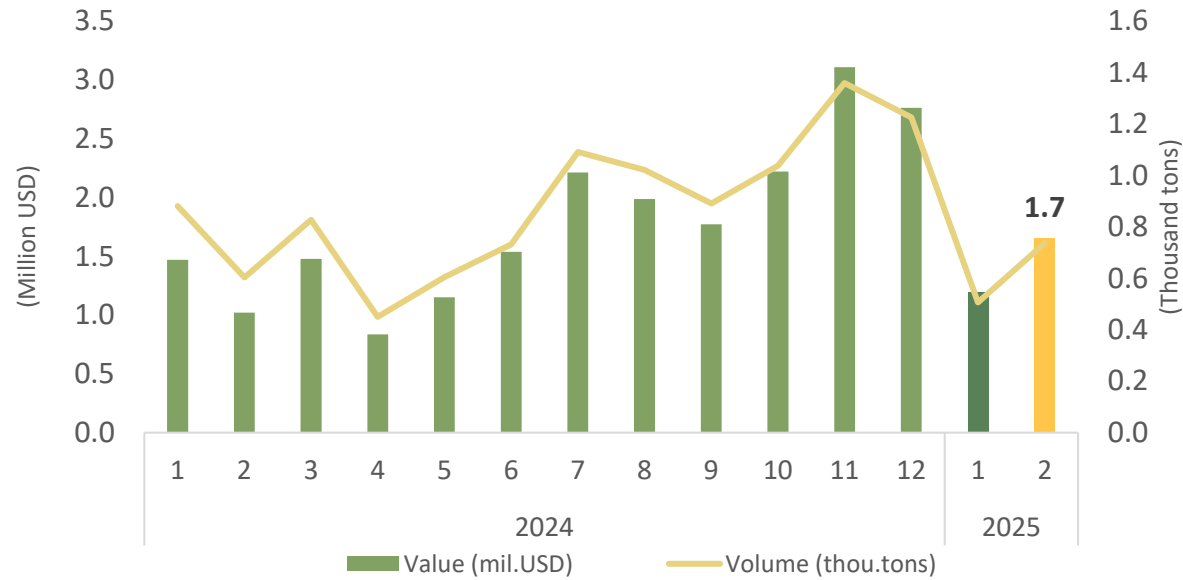
Value ratio of TOP 5 export enterprises to Japan, Feb-2025



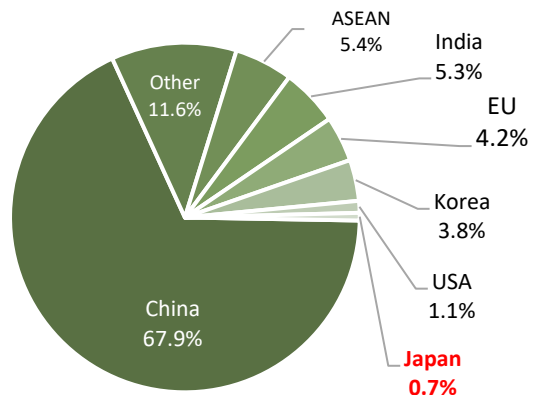


RUBBER

Export volume and value to Japan, Feb-2025



Percentage of export value to Japan, Feb-2025



Export results to Japan, Feb-2025

VALUE

1.66 million USD

↗ Increase **39.2%** compared to Jan-2025

↗ Increase **62.2%** compared to Feb-2024

↓ **0.14** million USD less than the monthly average rate in 2024

❖ Accumulated 02 months of 2025 reaches **2.8** million USD, **13.2%** of total 2024

VOLUME

737 tons

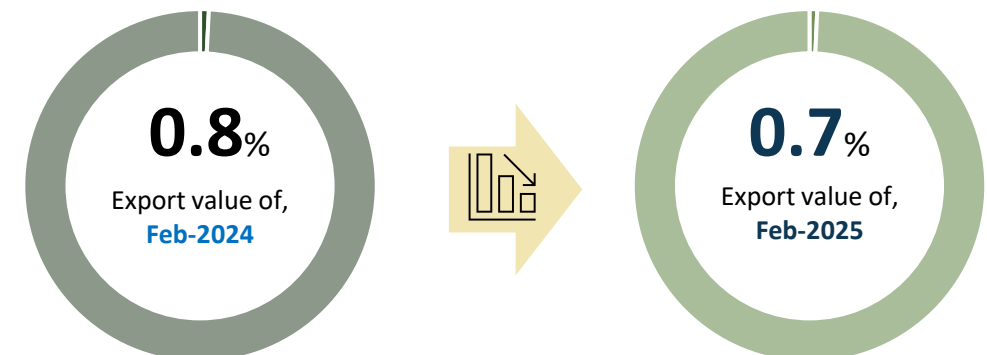
↗ Increase **45.7%** compared to Jan-2025

↗ Increase **22.2%** compared to Feb-2024

↓ **156** tons less than the monthly average rate in 2024

Accumulated 02 months of 2025 reaches **1.2** thousand tons, **11.6%** of total 2024

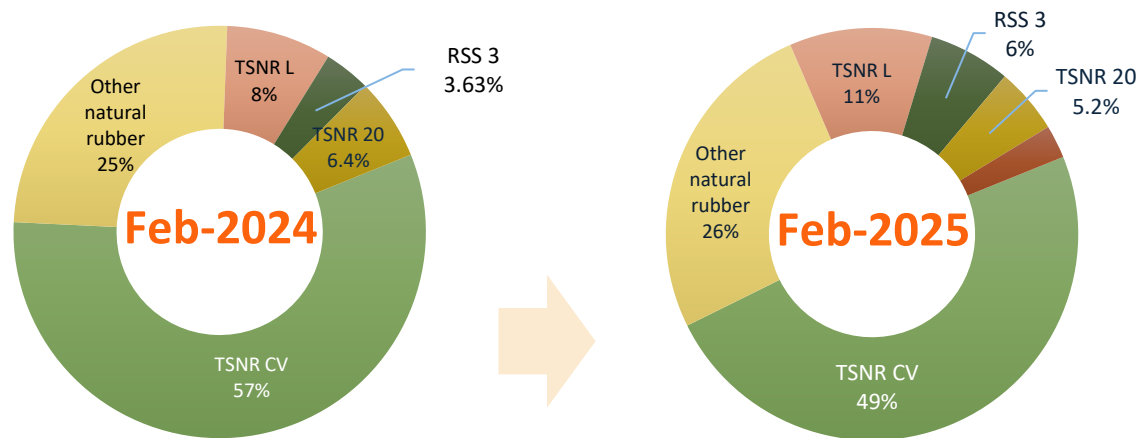
Changes in percentage of export value to Japan, Feb-2025



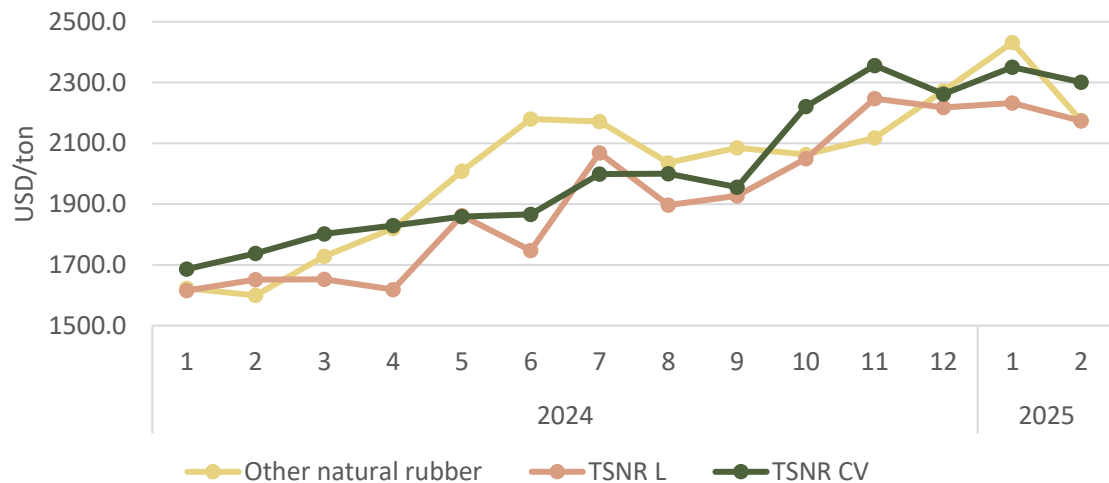


RUBBER

Structure of exports by products to Japan, Feb-2025



Average export rubber price to Japan, Feb-2025



Export results to Japan, Feb-2025



Other natural rubber

Value: **2.101** thousand USD

Increase **560%** compared to Jan-2025

Increase **728%** compared to Feb-2024



TSNR CV

Value: **864** thousand USD

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

Increase **49%** compared to Feb-2024



TSNR L

Value: **186** thousand USD

Increase **386%** compared to Jan-2025

Increase **120%** compared to Feb-2024

Other natural rubber

The average export price in Feb-2025 is **2.175** USD/ton; decrease **7.0%** compared to previous month; and increase **36%** compared to the same month of 2024.

TSNR CV

The average export price in Feb-2025 is **2.301** USD/ton; decrease **2.1%** compared to previous month; and increase **32%** compared to the same month of 2024.

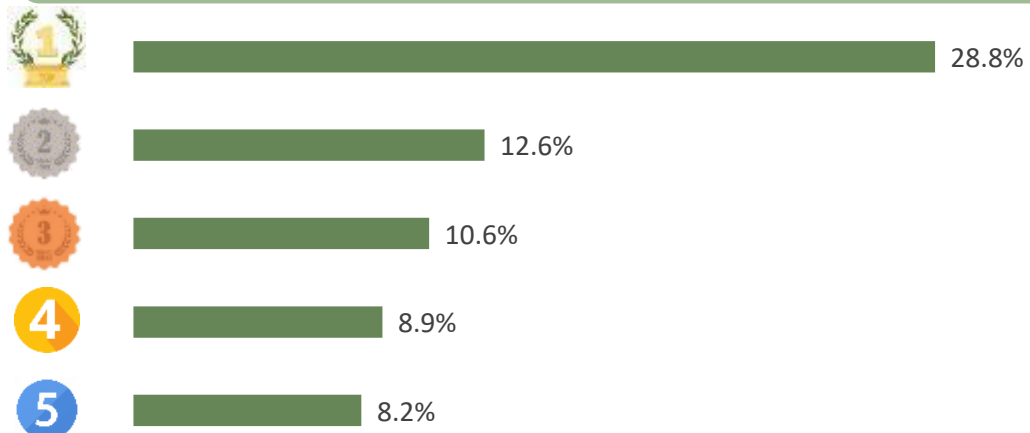
TSNR L

The average export price in Feb-2025 is **2.174** USD/ton; decrease **2.6%** compared to previous month; and increase **32%** compared to the same month of 2024.

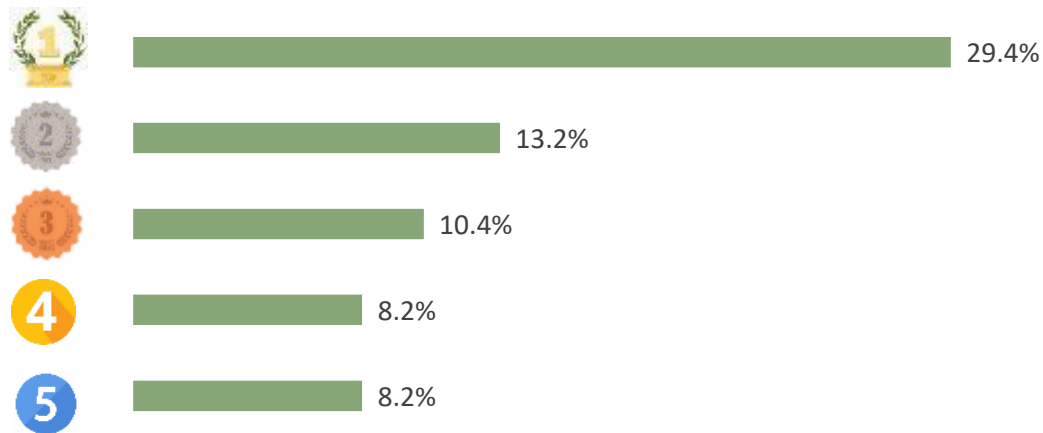


RUBBER

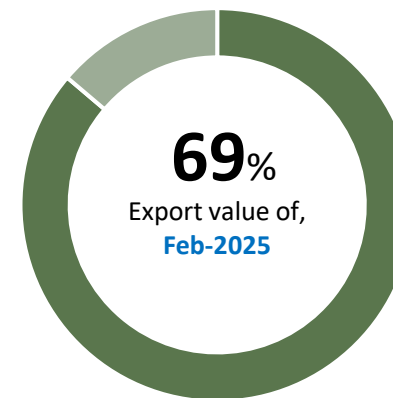
TOP 5 export enterprises by value to Japan, Feb-2025



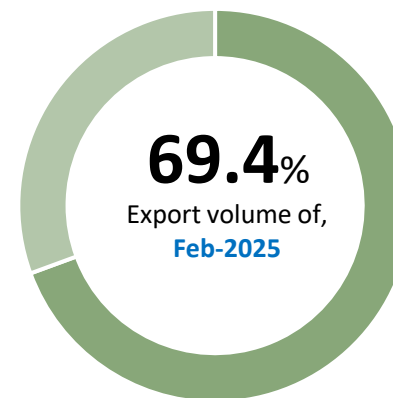
TOP 5 export enterprises by volume to Japan, Feb-2025



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



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





SPOTLIGHTS

Japan's Mitsui & Co. has expressed their interest in investing in Cambodia's agriculture sector, especially natural rubber.

On March 19, 2025, Mitsui's representatives had a meeting with the Cambodian Development Council (CDC). During the meeting, the Cambodian side introduced the investment law, the potential development of economic fields, and called on Mitsui to expand investment activities here.

Mitsui Group believes that Cambodia is a potential country in Southeast Asia, which is very suitable for Japanese investors looking for opportunities for long-term cooperation and development.

Source: kampucheathmey.com



Any comments. please send to:

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