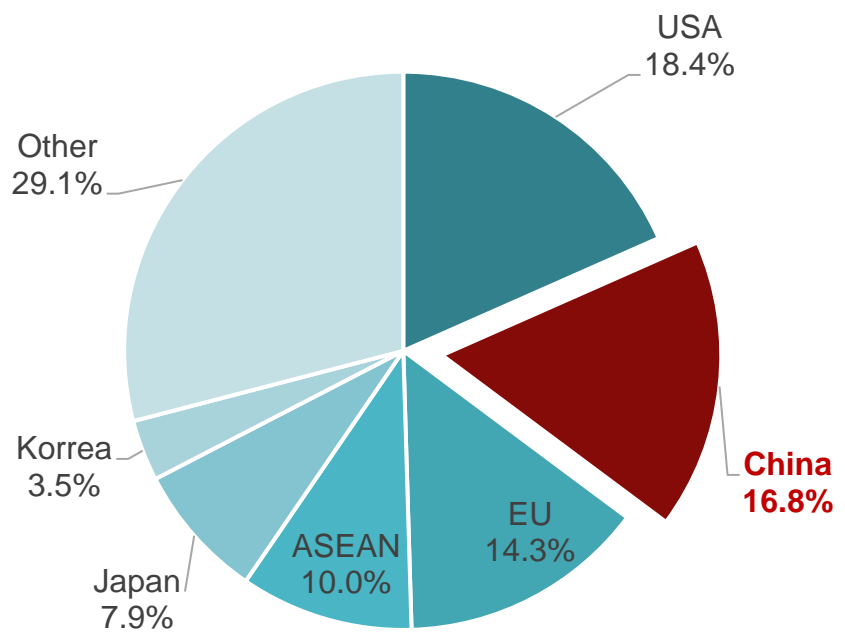


MONTHLY REPORT ON AGRI-PRODUCT EXPORT FROM VIETNAM TO CHINA MARKET



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

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

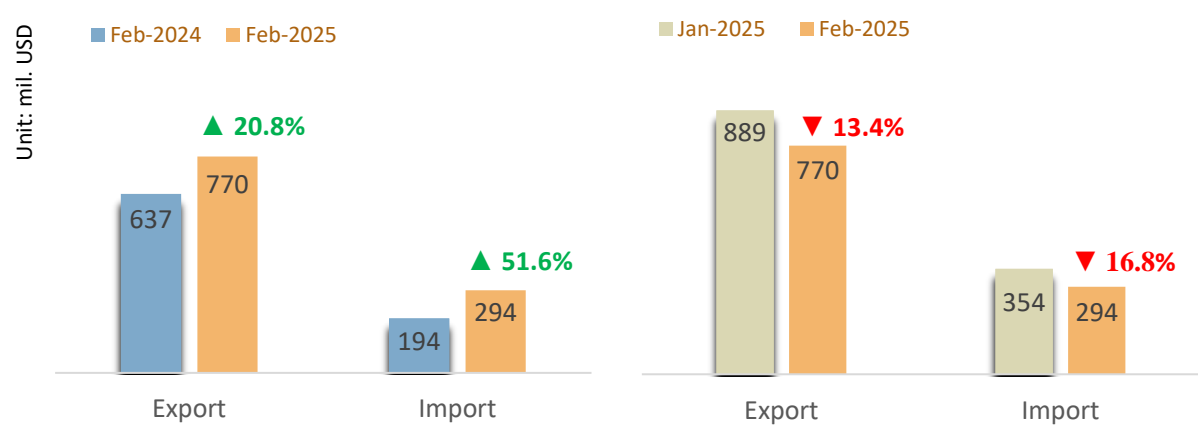


Changes in percentage of AFF product export value to the China, Feb-2025 compared to Jan-2025 and Feb-2024

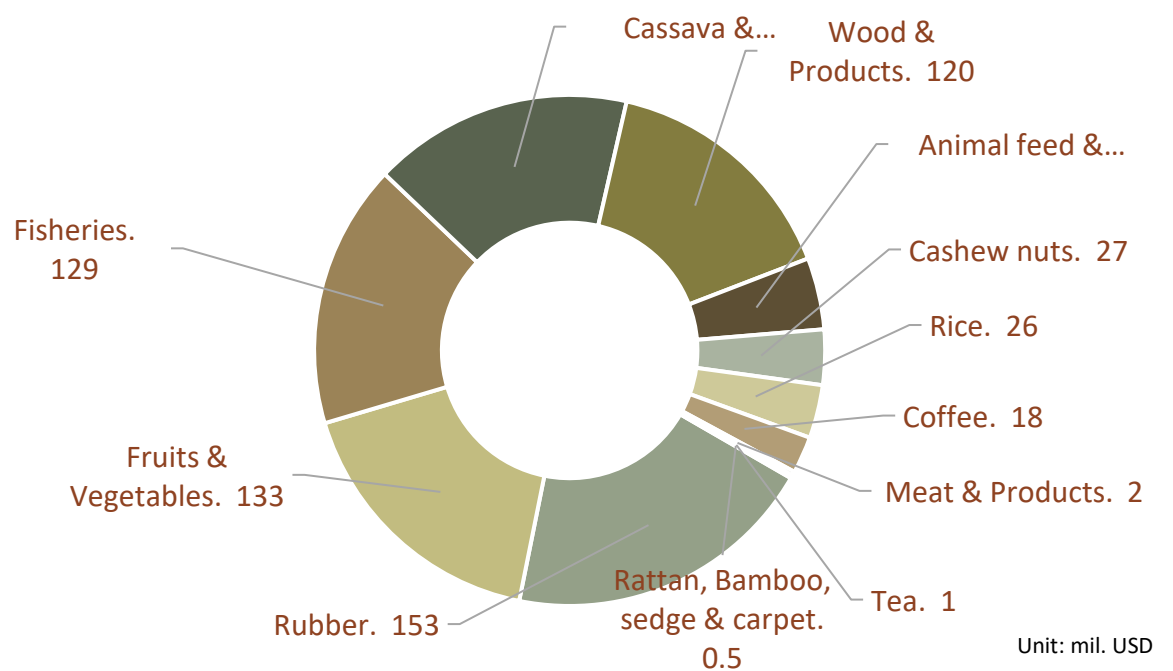
| | Value (Mil.USD) | compared to Jan-2025 | compared to Feb-2024 |
|--------------------|-----------------|----------------------|----------------------|
| USA | 842 | ▼ 3.6% | ▲ 0.7% |
| China | 770 | ▼ 1.0% | ▼ 2.2% |
| EU | 657 | ▲ 2.1% | ▲ 2.5% |
| ASEAN | 459 | ▲ 1.8% | ▼ 3.7% |
| Japan | 360 | ▲ 0.2% | ▲ 1.2% |
| Korea | 162 | ▼ 0.5% | ▼ 0.1% |
| Total export value | 4.581 | | |

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

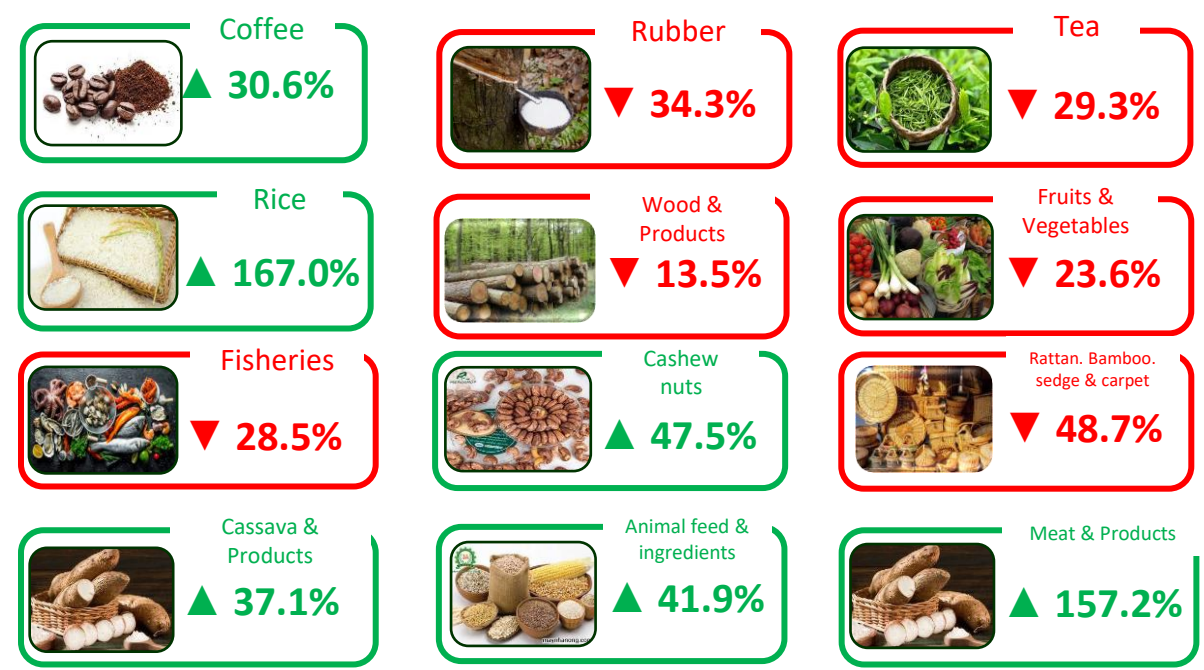
AFF product import-export turnover between Vietnam and China, Feb-2025



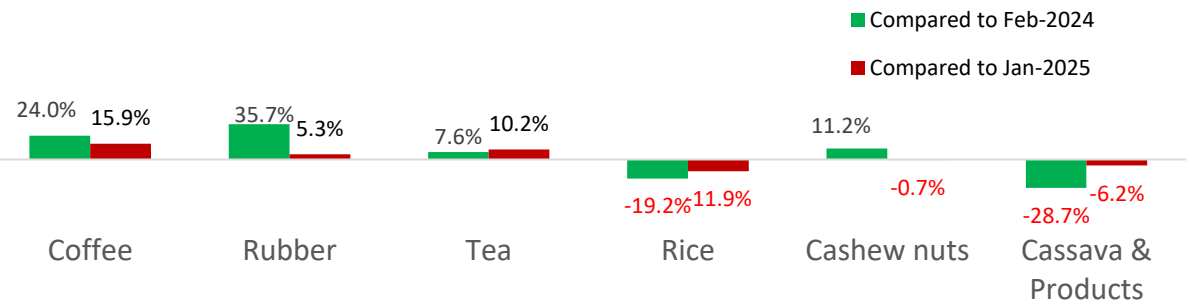
Key AFF product export value to China, Feb-2025



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



Source: Calculated from data of the Department of Customs

China's economy shows stable growth in Q1/2025

According to the National Bureau of Statistics, in Q1, the added value of China's key industrial sectors increased by 5.9% year-on-year and by 0.1% compared to 2024. Indicators for the service sector, total retail sales of consumer goods, and investment in fixed assets all showed stable growth.

Electricity consumption in February 2025

increased by 8.6% year-on-year, with the agriculture, industry, and service sectors rising by 10.2%, 12.4%, and 9.7% respectively. This data indicates that the industry sector had the highest growth in electricity consumption.

China's economy in 2025 continues its recovery momentum from Q4 2024. Based on March's economic performance, these indicators are expected to have positive signals thanks to a series of policies on boosting consumer demand

and supporting businesses.

This stable start in Q1 lays the foundation for China's economy to continue growing strongly in the coming quarters, thereby achieving the 2025 GDP growth target of 5%.



Source: Nhandan.vn

China plans to accelerate economic stimulus pack amid U.S. tariff pressure

In context of rising tariff tensions with the United States, China is considering fast-tracking economic stimulus measures such as consumer support, export subsidies, and establishing a market stabilization fund.

A recent meeting of Chinese policymakers focused on responding to trade tensions with the U.S., especially following the U.S.'s tariff hike on Chinese goods.

The proposed economic stimulus measures are about 1.5 to

2 trillion Yuan (approximately USD 274 billion). China also announced a 34% tariff on all U.S. imports, restricted the export of seven types of rare earth elements, and is considering tightening domestic companies' investments in the U.S. to increase leverage in negotiations with the Trump administration.



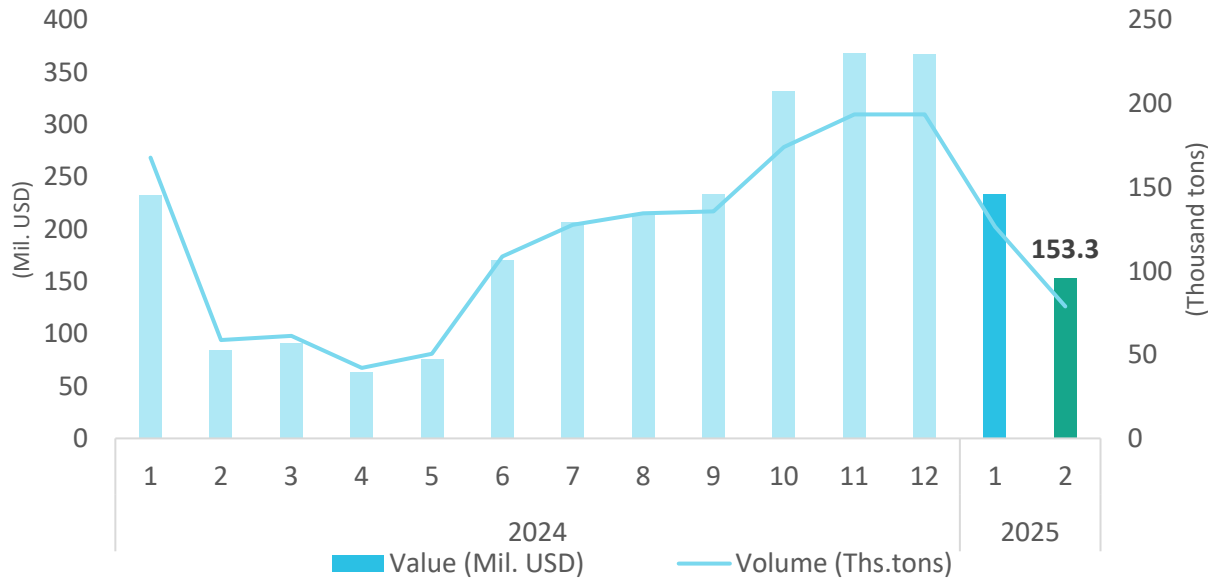
Source: Kinhtrungong.vn



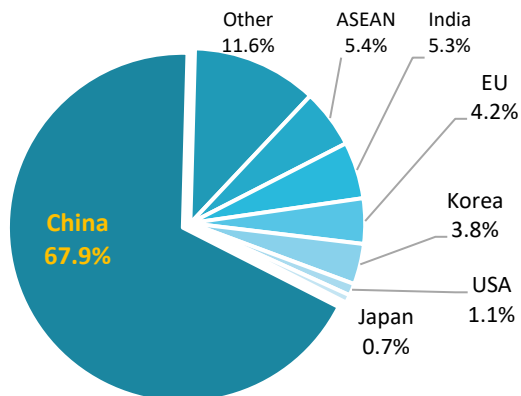


RUBBER

Export volume and value to China, Feb-2025



Percentage of export value to China, Feb-2025



Export results to China, Feb-2025

VALUE

153.3 mil. USD

Decreases **34.3%** compared to Jan-2025

Increases **82.3%** compared to Feb-2024

↓ **50 mil. USD** less than the monthly average rate in 2024

◆ Accumulated 2 months of 2025 reaches **387 mil. USD**, **15.8%** of total 2024

VOLUME

78.8 thousand tons

Decreases **37.6%** compared to Jan-2025

Increases **34.3%** compared to Feb-2024

↓ **42 thousand tons** less than the monthly average rate in 2024

◆ Accumulated 2 months of 2025 reaches **205 thousand tons**, **14.2%** of total 2024

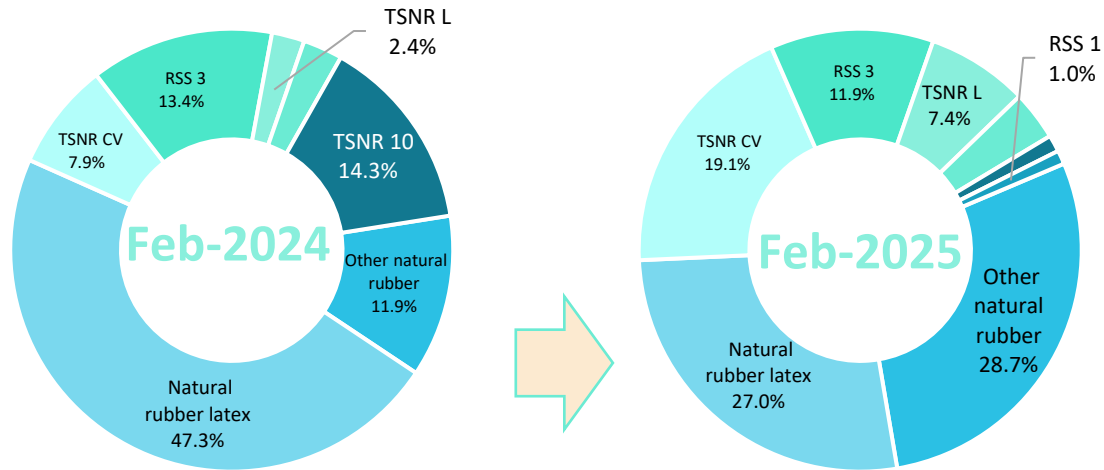
Changes in percentage of export value to China, Feb-2025



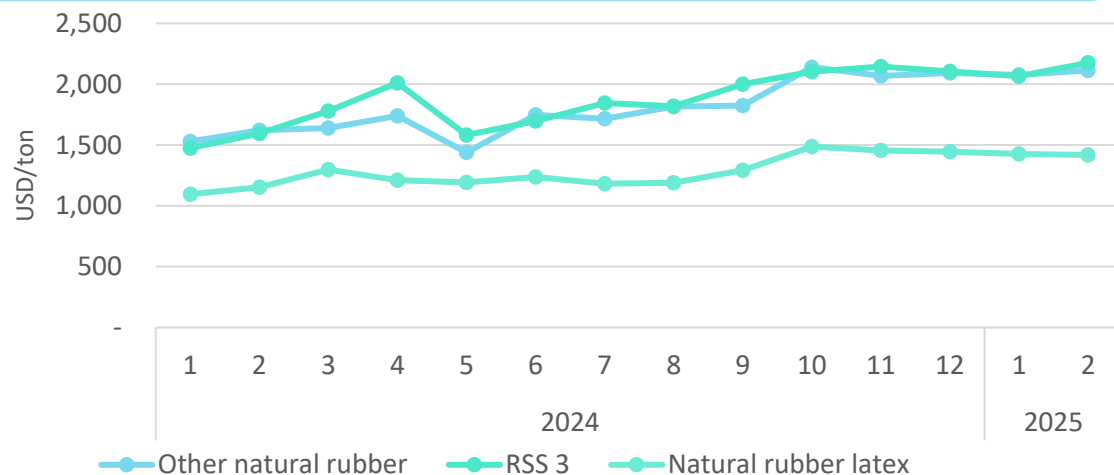


RUBBER

Structure of exports by products to China, Feb-2025



Average export price to China, Feb-2025



Export results to China, Feb-2025



Natural rubber latex

Value: **41.3** mil. USD

Decreases **78%** compared to Jan-2025

Increases **3.8%** compared to Feb-2024



RSS 3

Value: **18.3** mil. USD

Increases **7.1%** compared to Jan-2025

Increases **62.3%** compared to Feb-2024



Other natural rubber

Value: **44** mil. USD

Increases **203%** compared to Jan-2025

Increases **341%** compared to Feb-2024

Natural rubber latex

The average export price in Feb-2025 is **1,420** USD/ton; **decreases 0.4%** compared to the previous month; and **increases 23.3%** compared to the same month of 2024.

RSS 3

The average export price in Feb-2025 is **1,926** USD/ton; **increases 5.3%** compared to the previous month; and **increases 36.5%** compared to the same month of 2024.

Other natural rubber

The average export price in Feb-2025 is **1,906** USD/ton **increases 1.8%** compared to the previous month; and **increases 33.6%** compared to the same month of 2024.

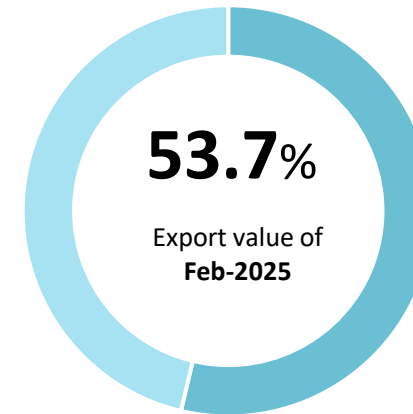


RUBBER

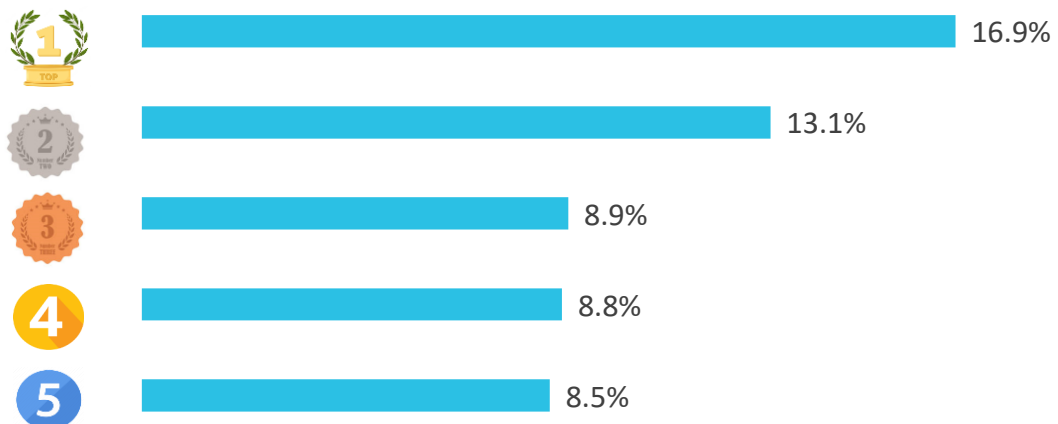
TOP 5 export enterprises by value to China, Feb-2025



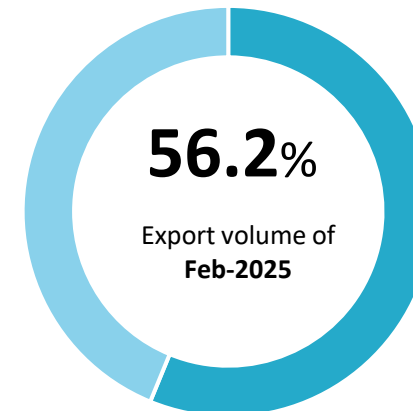
Value ratio of TOP 5 export enterprises to China, Feb-2025



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



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





RUBBER

SPOTLIGHTS

❖ China's natural rubber market shows slight fluctuations

Natural rubber prices in China remain high but it may decrease as the tapping season begins. The Yunnan region has started tapping, while other areas such as Hainan, Vietnam, and northeastern Thailand have not yet entered the harvesting season.

Tire production remains stable. As of March 21, the operating rate for semi-steel tires at Chinese enterprises was around 83%, while the rate for all-steel tires in Shandong increased to 69%.

Source: Sunsirs.com

❖ AI-powered rubber tapping robot introduced in China

China introduced a mobile rubber tapping robot to address labor shortages in the natural rubber sector. The robot was developed by the Chinese Academy of Tropical Agricultural Sciences (CATAS) and technology company Automotive Walking Technology. It features autonomous navigation and will be piloted in rubber plantations in Hainan Province during the upcoming harvesting season.

The robot utilizes artificial intelligence, combining laser radar and sensors to perform precise cuts, achieving 80% of the efficiency of manual labor. It can tap 100 to 120 trees per hour and operate continuously for over 8 hours using a lithium battery. Once mass production begins, the robot's cost is expected to drop below 100,000 yuan

Source: News.cn





FRUITS & VEGETABLES (EXPORT)

Export volume and value to China, Feb-2025



Export results to China, Feb-2025



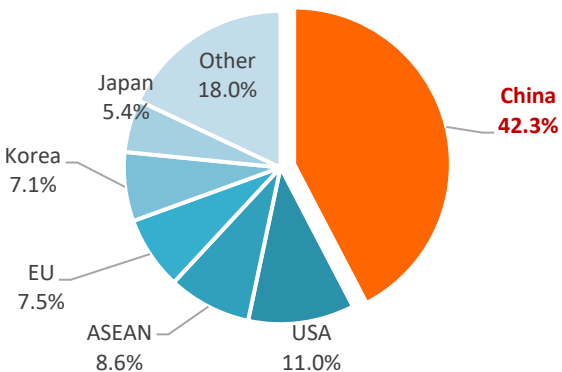
Decreases **23.6%** compared to Jan-2025

Decreases **32.1%** compared to Feb-2024

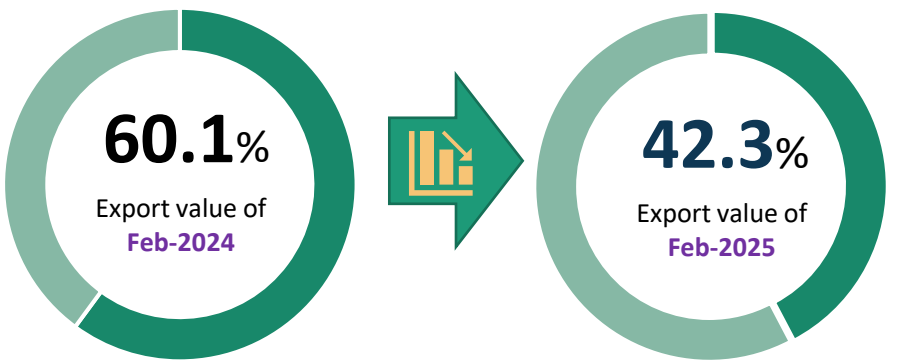
253.0 mil. USD less than the monthly average rate in 2024

Accumulated 2 months of 2025 reaches **305.8** mil, USD. **6.6%** of total 2024

Percentage of export value to China, Feb-2025



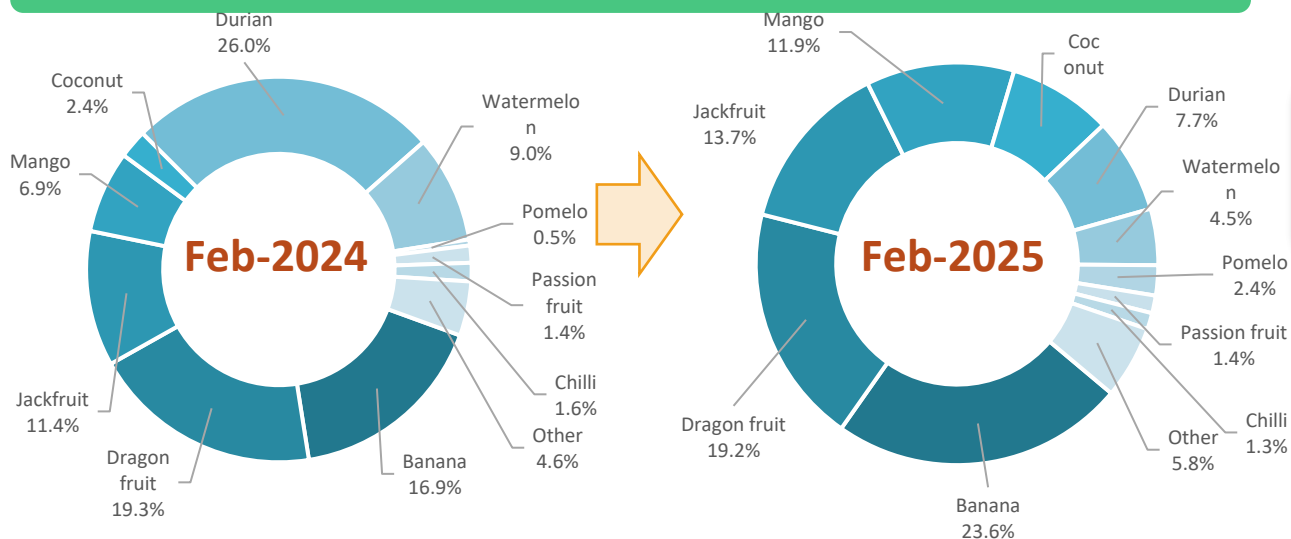
Changes in percentage of export value to China, Feb-2025





FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to China, Feb-2025



Export results of some main products to China, Feb-2025



Banana

Value: **31.4** mil. USD

Increases **41.3%** compared to Jan-2025

Decreases **5.3%** compared to Feb-2024



Dragon fruit

Value: **25.5** mil. USD

Decreases **34.0%** compared to Jan-2025

Decreases **32.7%** compared to Feb-2024



Jackfruit

Value: **18.3** mil. USD

Decreases **24.2%** compared to Jan-2025

Decreases **18.0%** compared to Feb-2024



Mango

Value: **15.8** mil. USD

Increases **24.4%** compared to Jan-2025

Increases **17.4%** compared to Feb-2024



Coconut

Value: **11.1** mil. USD

Increases **4.0%** compared to Jan-2025

Increases **135.8%** compared to Feb-2024



Durian

Value: **10.2** mil. USD

Decreases **55.9%** compared to Jan-2025

Decreases **80.0%** compared to Feb-2024



Watermelon

Value: **6.0** mil. USD

Decreases **30.3%** compared to Jan-2025

Decreases **65.9%** compared to Feb-2024



Pomelo

Value: **3.2** mil. USD

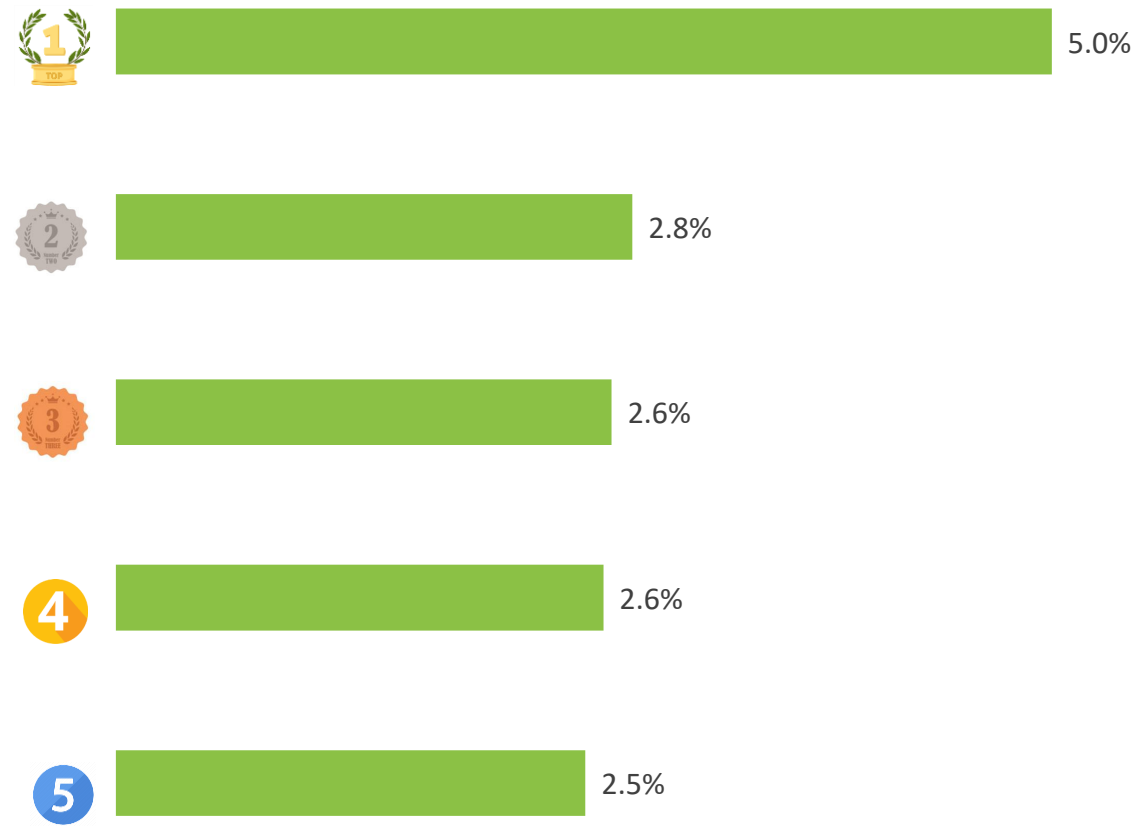
Decreases **17.6%** compared to Jan-2025

Increases **227.2%** compared to Feb-2024

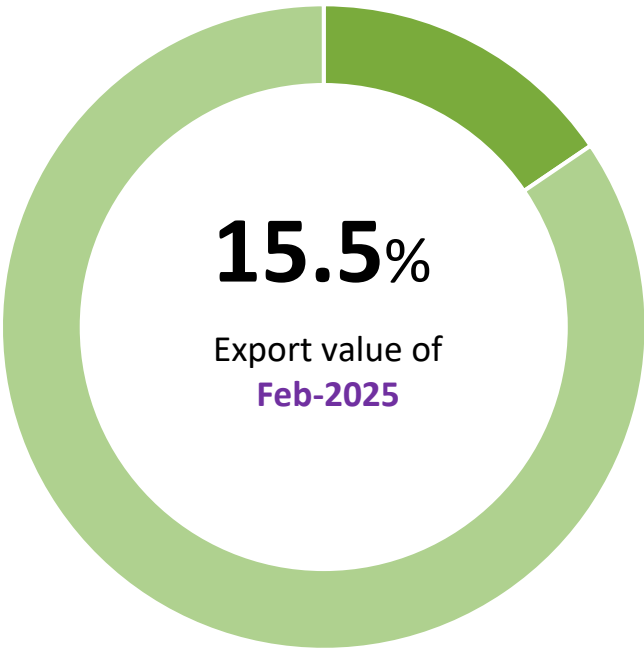


FRUITS & VEGETABLES (EXPORT)

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



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

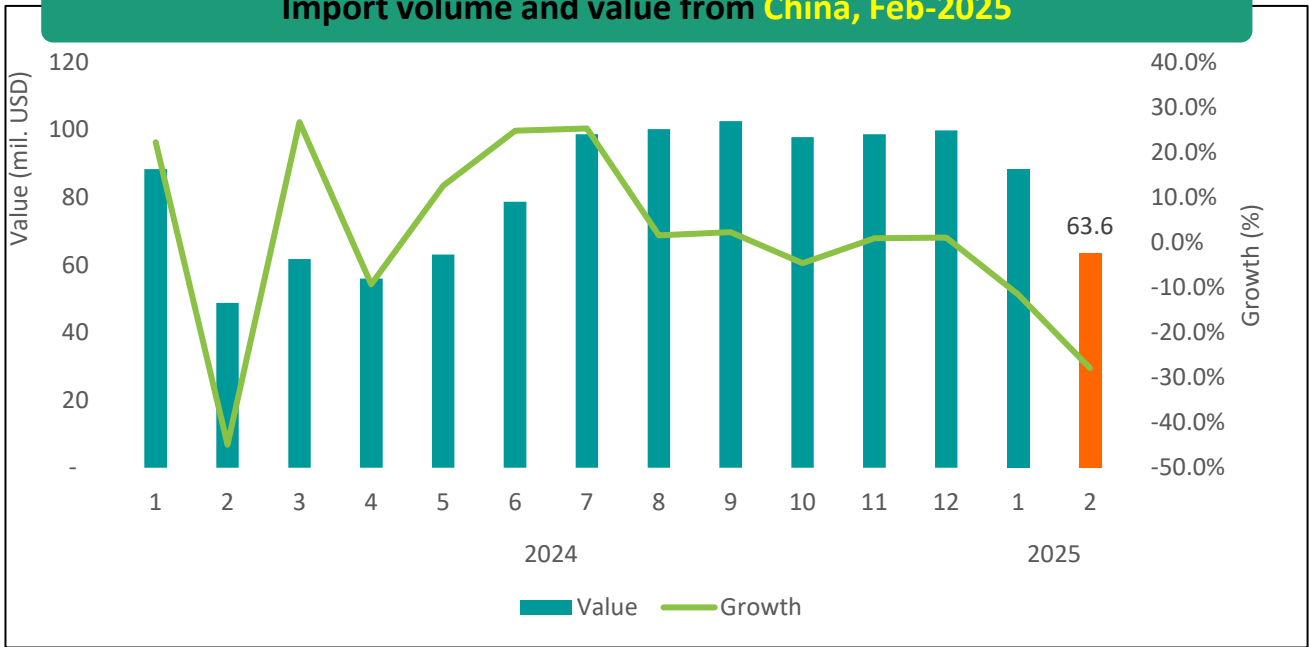


Source: Calculated from data of the Department of Customs



FRUITS & VEGETABLES (IMPORT)

Import volume and value from China, Feb-2025



Import results from China, Feb-2025

VALUE



88.3

mil. USD

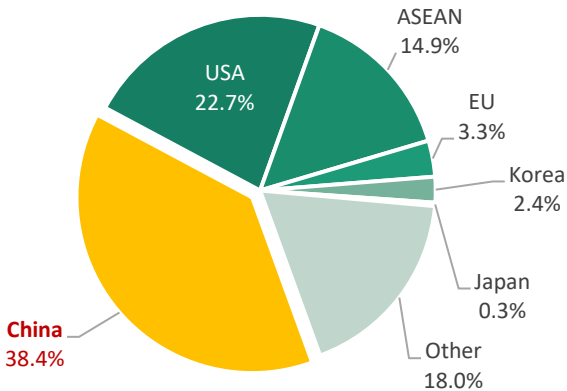
Decreases **27.9%** compared to Jan-2025

Increases **30.5%** compared to Feb-2024

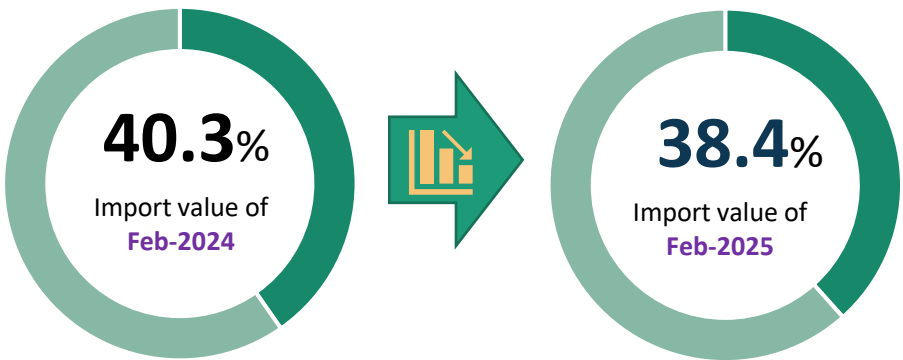
19.2 mil. USD less than the monthly average rate in 2024

Accumulated 2 months of 2025 reaches **151.9 mil. USD**, **15.3%** of total 2024

Percentage of import value from China, Feb-2025



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

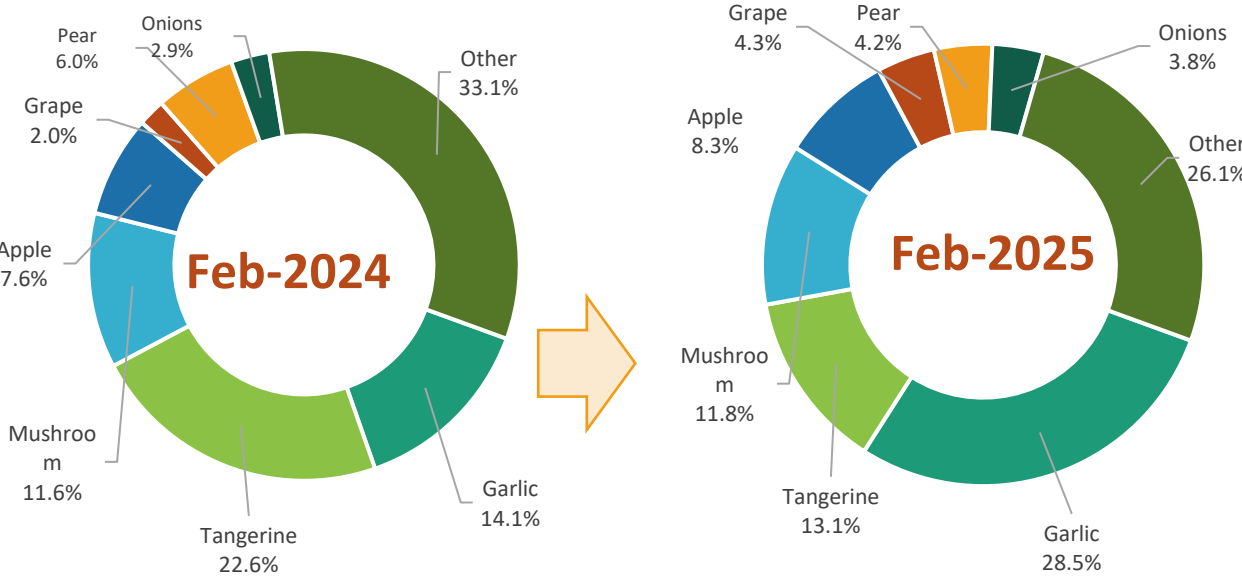




FRUITS & VEGETABLES (IMPORT)

Structure of imports by products from China, Feb-2025

Import results of some main products from China, Feb-2025



Garlic
 Value: **18.1** mil. USD
 Increases **52.1%** compared to Jan-2025
 Increases **163.7%** compared to Feb-2024



Tangerine
 Value: **8.3** mil. USD
 Decreases **47.8%** compared to Jan-2025
 Decreases **24.5%** compared to Feb-2024



Mushroom
 Value: **7.5** mil. USD
 Decreases **17.2%** compared to Jan-2025
 Increases **32.2%** compared to Feb-2024



Apple
 Value: **5.3** mil. USD
 Decreases **55.8%** compared to Jan-2025
 Increases **42.0%** compared to Feb-2024



Grape
 Value: **2.7** mil. USD
 Decreases **54.6%** compared to Jan-2025
 Increases **173.6%** compared to Feb-2024



Pear
 Value: **2.7** mil. USD
 Decreases **55.8%** compared to Jan-2025
 Decreases **8.0%** compared to Feb-2024



Onions
 Value: **2.4** mil. USD
 Decreases **8.9%** compared to Jan-2025
 Increases **69.3%** compared to Feb-2024

Source: Calculated from data of the Department of Customs



China's durian imports drop 56.7% in the first two months of 2025

In the first two months of 2025, China imported 23,000 tons of durian, a decrease of 56.7% compared to the same period in 2024, returning to the 2021 import level. The import value reached USD 870 million, reducing 57.3%. Thailand reclaimed its position as the leading supplier with an 86% market share (14,300 tons), while Vietnam - which accounted for 62% in 2024 - saw a sharp decline to just 11% (8,501 tons). The Philippines has virtually withdrawn from the market due to a typhoon disaster, while Malaysia continues to export its premium Musang King durians.

Source: Guojiguoshu.com

First 24 tons of frozen durian exported to China

On March 24, Nam Do Agricultural Products Joint Stock Company held a signing ceremony with a Chinese import partner and shipped 24 tons of frozen durian from its factory in Krông Pắc District, Đắk Lắk Province, to China. This is Vietnam's first frozen durian shipment exported to China after the two countries signed a protocol on frozen durian exports on August 19, 2024. The shipment was sampled, underwent final inspection before dispatching, and loaded into containers for transport to the border gate.

Source: Nongnghiep.vn



Vietnam's durian exports to China dropped in the first two months of 2025

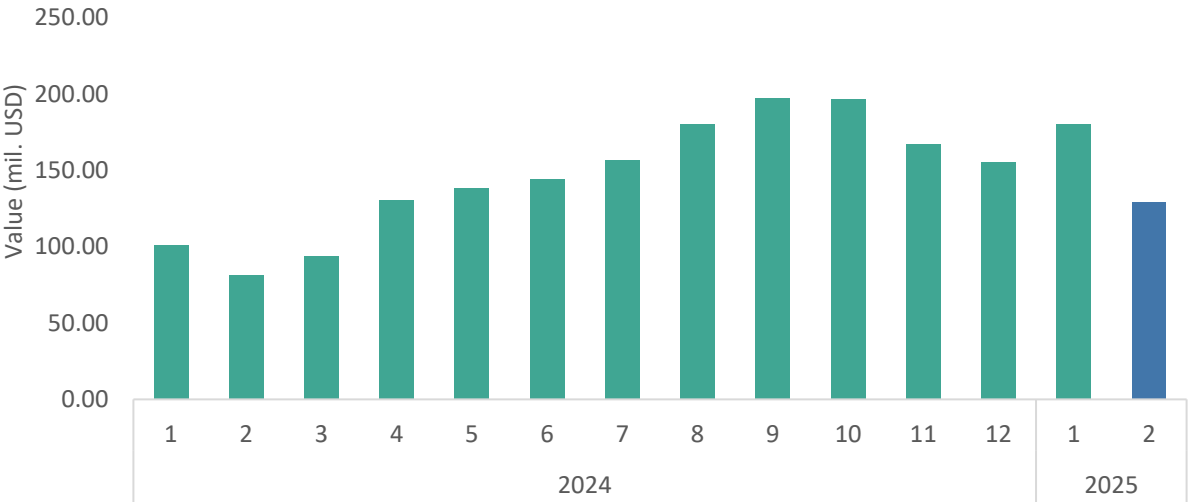
In the first two months of 2025, Vietnam exported only 14.7 thousand tons of durian, with a value of USD 52.7 million - a decrease of 62.2% in volume and 69.4% in value compared to the same period last year. This sharp decline was mainly due to a nearly 83% drop in durian exports to China, which fell to just USD 27.1 million. China's share of Vietnam's total durian exports also dropped to 51.4%, down from nearly 92% in the same period last year.

Source: Vietnambiz.vn



FISHERIES

Export volume and value to China, Feb-2025



Export results to China, Feb-2025

VALUE

129.1 *mil. USD*

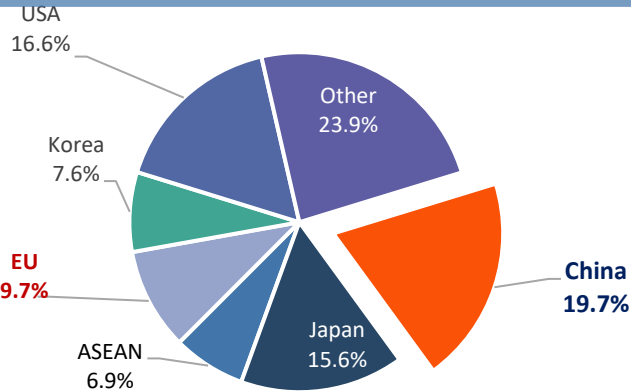
Decreases **28.5%** compared to Jan-2025

Increases **58.8%** compared to Feb-2024

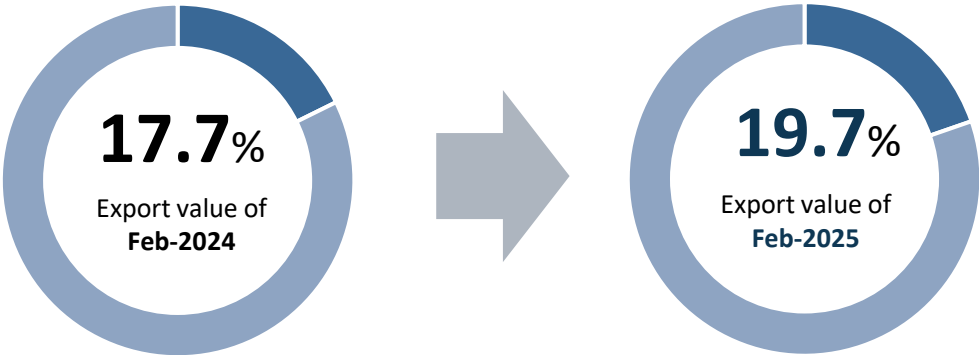
16.1 mil. USD less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **309.6** mil. USD, **17.8%** of total 2024

Percentage of export value to China, Feb-2025



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

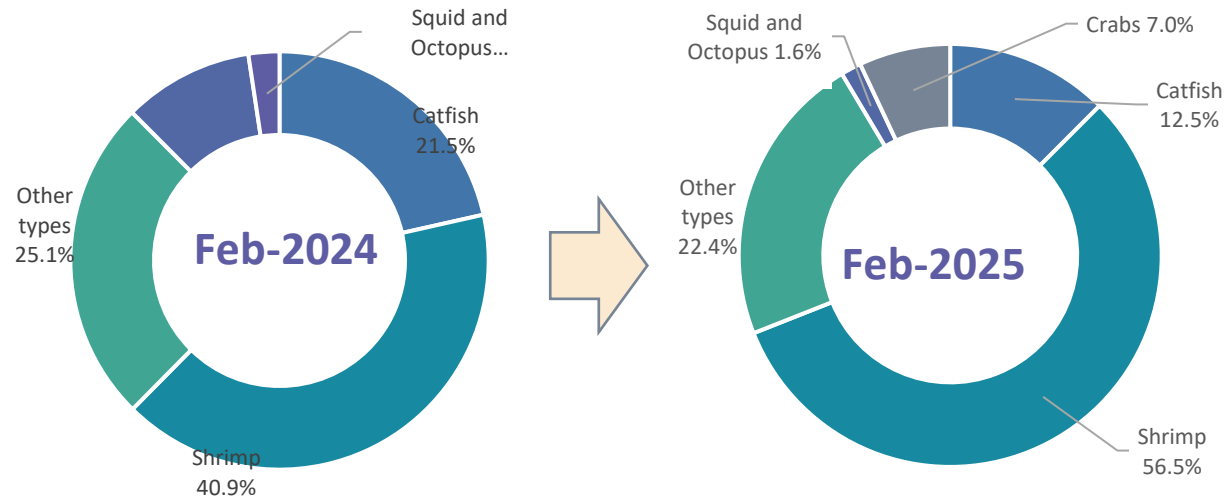


Source: Calculated from data of the Department of Customs

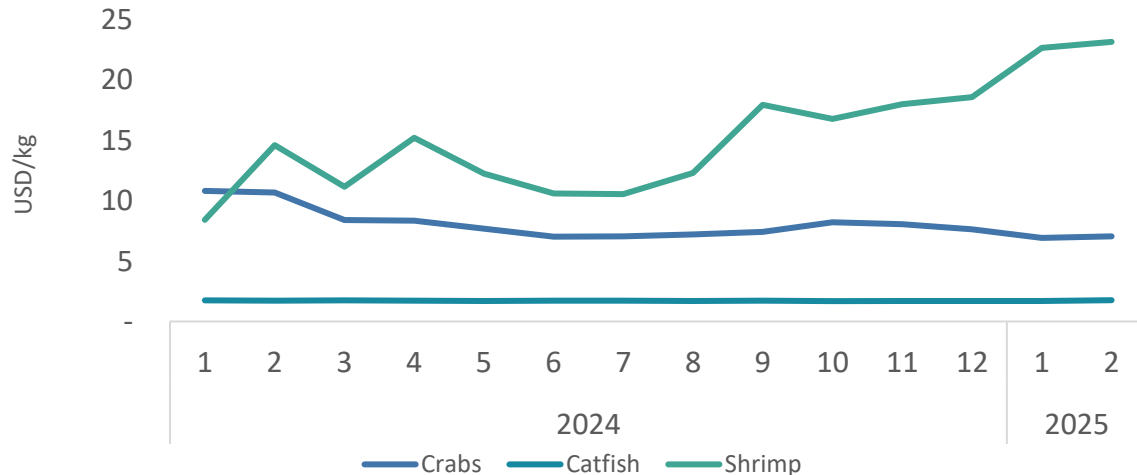


FISHERIES

Structure of exports by products to China, Feb-2025



Average export seafood price to China, Feb-2025



Seafood exports to China, Feb-2025



Catfish

Value: **16.1** mil. USD

Decreases **32.0%** compared to Jan-2025

Decreases **7.7%** compared to Feb-2024



Shrimp

Value: **73.0** mil. USD

Decreases **35.0%** so với T1/2025

Increases **119.3%** compared to Feb-2024



Crabs

Value: **9.0** mil. USD

Decreases **52.2%** compared to Jan-2025

Increases **10.4%** compared to Feb-2024

Crabs

The average export price in Feb-2025 is **7.1 USD/kg**; **increases 1.9%** compared to the previous month; and **decreases 34.0%** compared to the same month of 2024.

Catfish

The average export price in Feb-2025 is **1.8 USD/kg**; **increases 3.6%** compared to the previous month; and **increases 2.4%** compared to the same month of 2024.

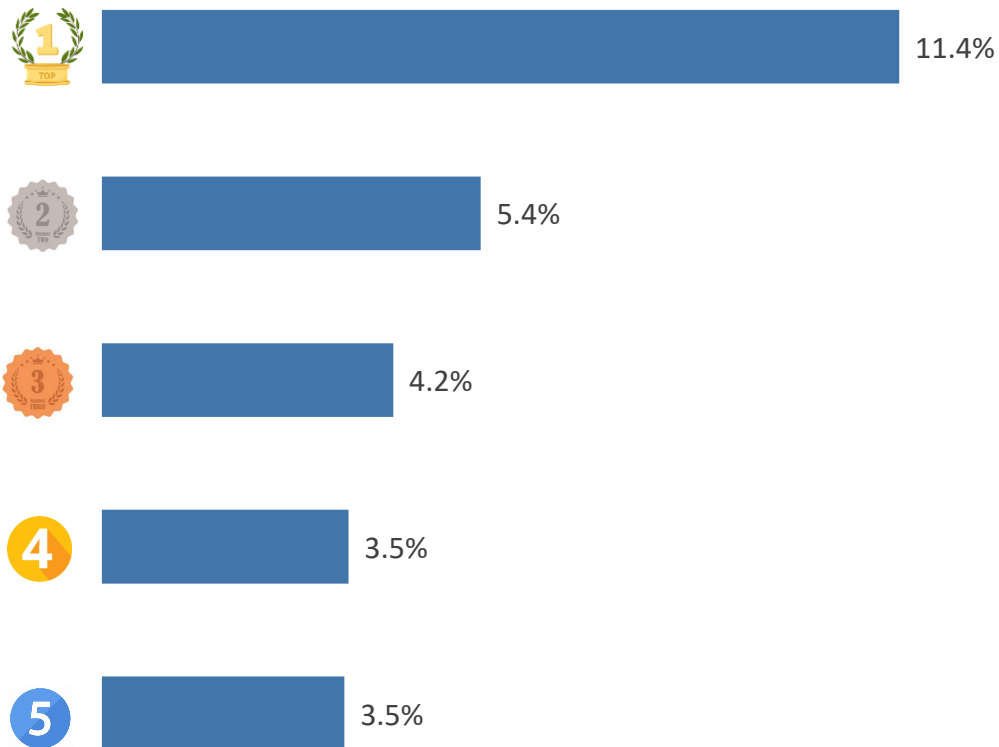
Shrimp

The average export price in Feb-2025 is **23.2 USD/kg**; **increases 2.2%** compared to the previous month; and **increases 58.6%** compared to the same month of 2024. (high average price due to large proportion of lobster)

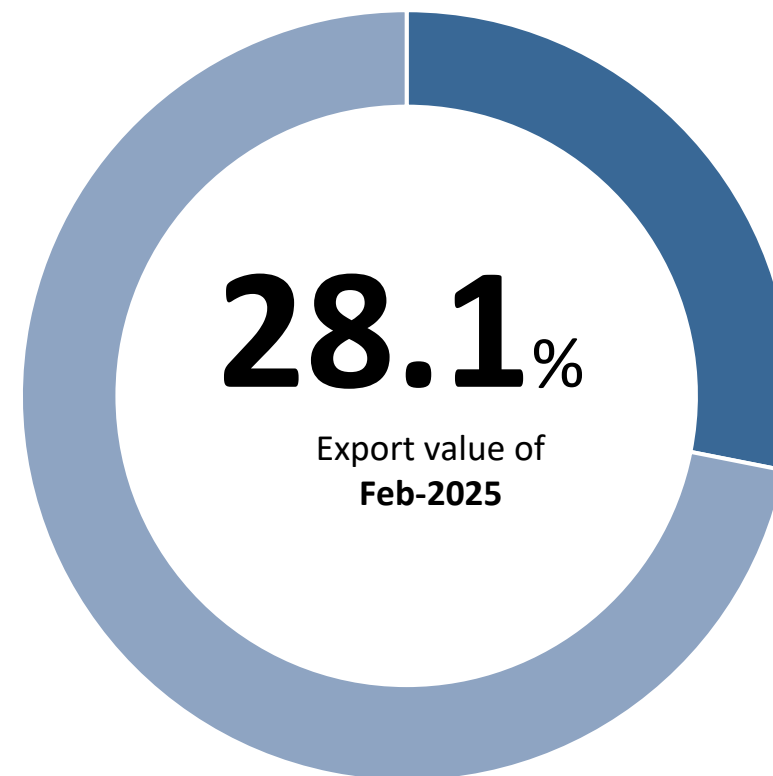


FISHERIES

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



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



China imposes 25% tariff on Canadian seafood

From March 20, 2025, China officially impose a 25% tariff on seafood products imported from Canada. This new tariff policy has significant impact on Canada's seafood sector, particularly in Newfoundland and Labrador provinces, which heavily relies on exports to the Chinese market.

In 2024, Canada exported approximately 110,000 tons of fish and seafood to China, worth USD 1.3 billion, down 5% from 2023. Key affected products include coldwater shrimp, live crab, frozen crab, and frozen halibut.

The Fisheries Council of Canada warned that this new tariff, combined with existing trade barriers from the United States, will worsen the difficulties faced by Canadian seafood businesses. Mr. Alberto Wareham, Chairman of the Council, stated that many products almost export to the Chinese market, and losing this market could become a "disaster" for businesses in the sector.

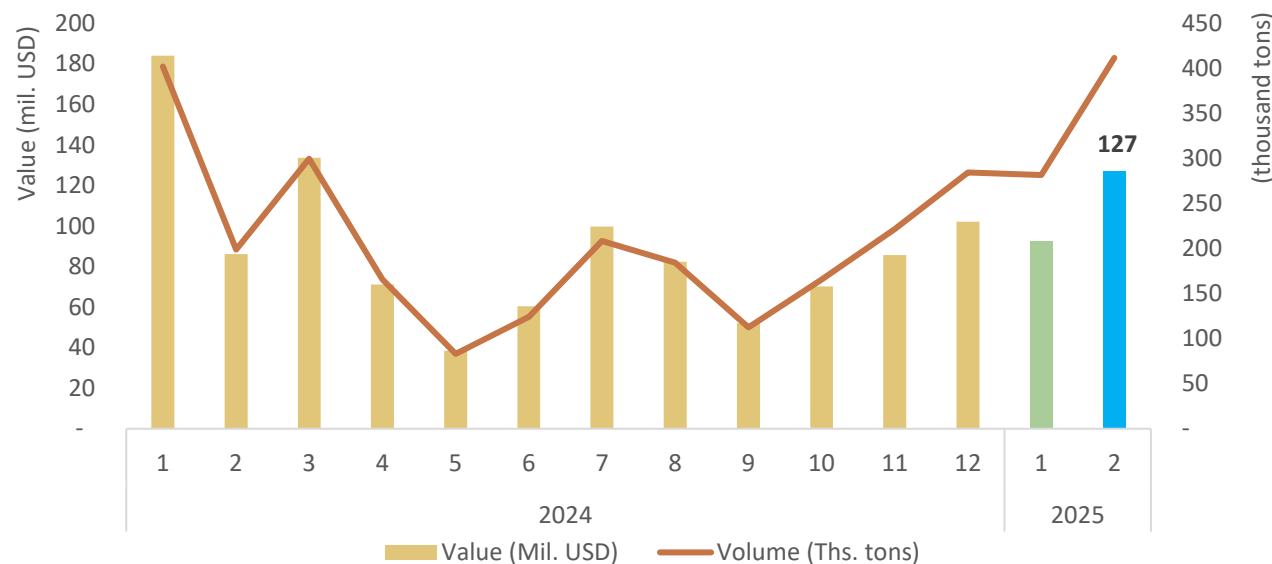
Source: vasep (Mar-2025)





CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to China, Feb-2025



Export results to China, Feb-2025

VALUE

127.1 mil. USD

Increases **37.1%** compared to Jan-2025

Increases **47.6%** compared to Feb-2024

Increases **38.3 mil. USD** more than the monthly average rate in 2024

Accumulated 2 months of 2025 reaches **219.8 mil. USD, 20.6%** of total 2024

VOLUME

411.5 thousand tons

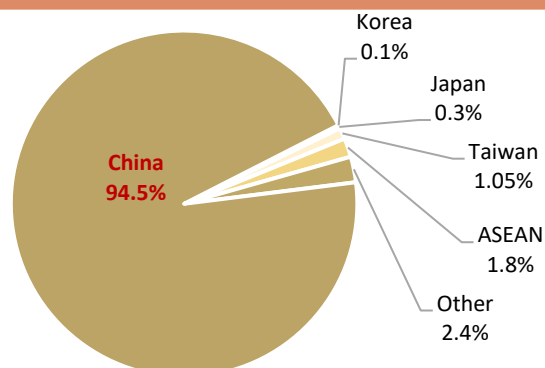
Increases **46.1%** compared to Jan-2025

Increases **107%** compared to Feb-2024

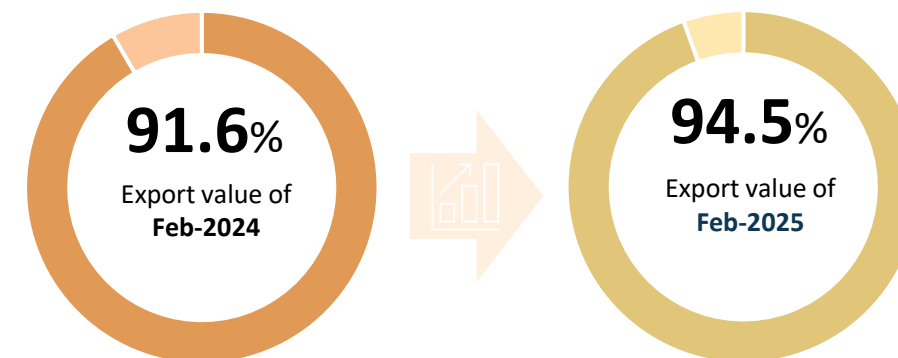
Increases **207.4 ths. tons** more than the monthly average rate in 2024

Accumulated 2 months of 2025 reaches **0.69 mil. tons, 28.3%** of total 2024

Percentage of export value to China, Feb-2025



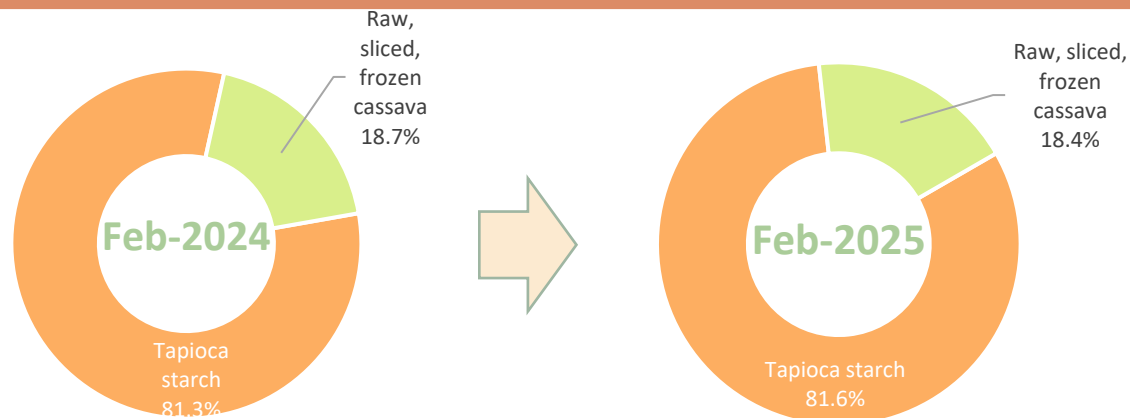
Changes in percentage of export value to China, Feb-2025





CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to China, Feb-2025



Export results to China, Feb-2025



Raw. sliced. frozen cassava

Value: **23.4** mil. USD

Increases **132.6%** compared to Jan-2025

Increases **45%** compared to Feb-2024



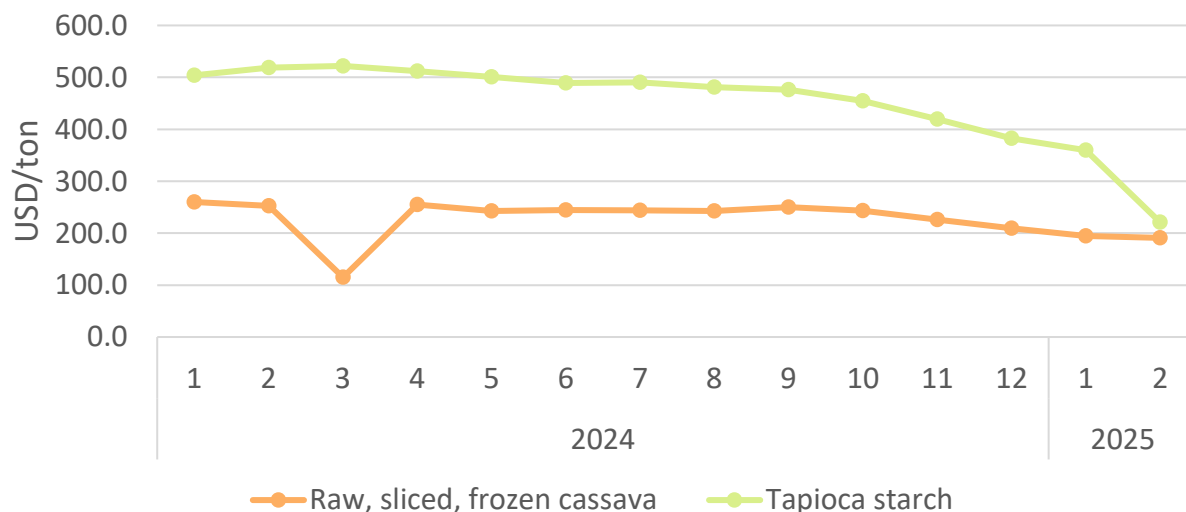
Tapioca starch

Value: **103.7** mil. USD

Increases **25.5%** compared to Jan-2025

Increases **48.2%** compared to Feb-2024

Percentage of export value to China, Feb-2025



Tapioca starch

The average export price in Feb-2025 is **221** USD/ton; **decreases 24.3%** compared to the previous month; and **decreases 57.3%** compared to the same month of 2024.

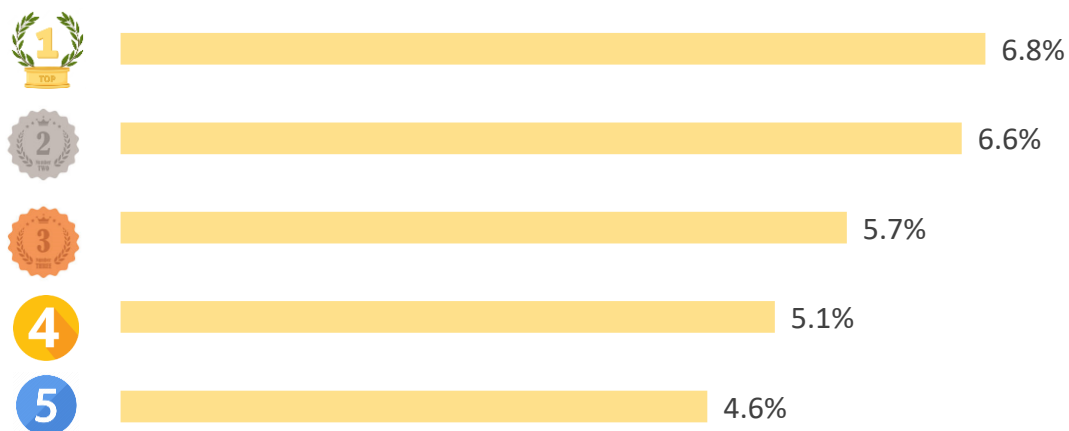
Raw. sliced. frozen cassava

The average export price in Feb-2025 is **191** USD/ton; **decreases 1.8%** compared to the previous month; and **decreases 38.4%** compared to the same month of 2024.

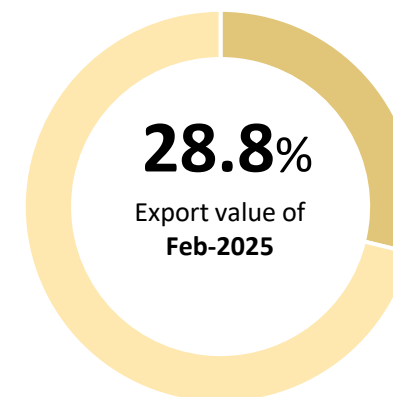


CASSAVA & CASSAVA PRODUCTS

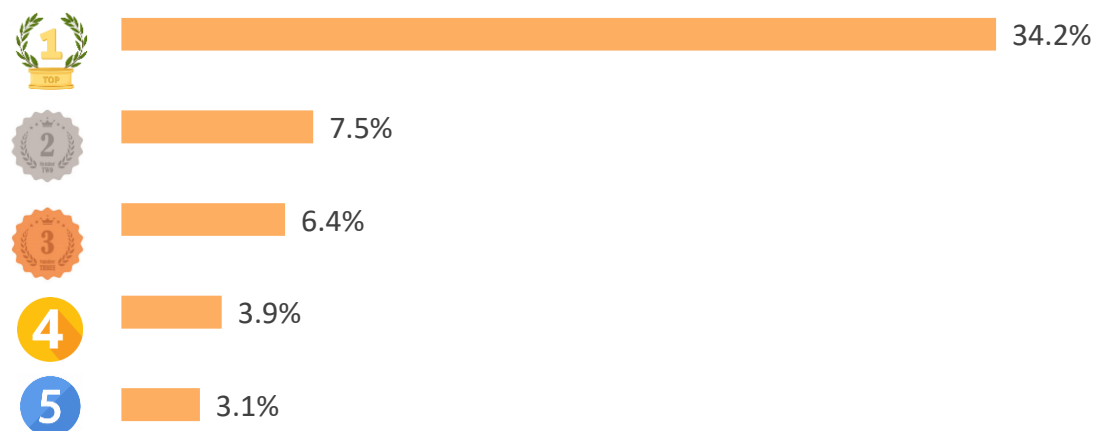
TOP 5 export enterprises by value to Volume ratio of TOP 5 export enterprises to **China, Feb-2025**



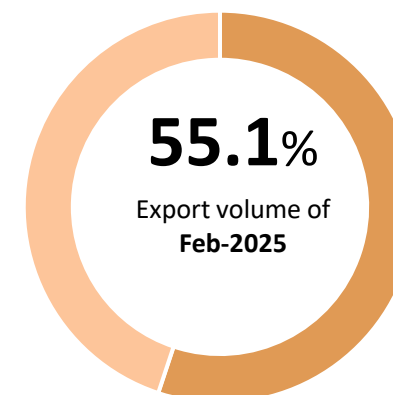
Value ratio of TOP 5 export enterprises to **China, Feb-2025**



TOP 5 export enterprises by volume to **China, Feb-2025**



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





China's imports of cassava and cassava products increased in the first two months of 2025

In the first two months of 2025, China imported 860.2 thousand tons of cassava starch, reaching a turnover of USD 178.4 million. Compared to the same period last year, import volume increased by 47.17% and value increased by 17.92%. The main suppliers include Thailand, accounting for 48.49% of total imports, followed by Vietnam with 35.57%, Laos with 13.97%, and Cambodia with 1.98%.

During the same period, China also imported 489.7 thousand tons of dried cassava, valued at USD 95.4 million. While the volume increased by 31.7%, the import value decreased by 4.09% compared to the same period last year. Thailand remained the largest supplier, accounting for 80.31% of total dried cassava imports, followed by Vietnam with 19.32%.

Source: 163.com





The first large shipment of cassava chips from Cambodia arrived at Beihai port, China

On March 15, 2025, the first three shipments of cassava chips from Cambodia, imported by COFCO Biotechnology Co., Ltd., arrived at Tieshan Port, Beihai, marking a new milestone in trade cooperation between Guangxi (China) and Cambodia. This is the result of the Memorandum of Understanding on trade cooperation signed between the two parties on February 2022 under the Regional Comprehensive Economic Partnership (RCEP).

In recent years, trade cooperation between Guangxi and ASEAN countries, especially Cambodia, has been increasingly strengthened. In 2024, bilateral trade reached 6.67 billion yuan (approximately USD 939 million), a 61.6% increase compared to the same period in 2023. Guangxi has now become a key distribution hub for Cambodian agricultural products entering the Chinese market.

Source: gx.cri.cn



The first batch of cassava starch from Laos was successfully imported into China

Hainan Company (part of Shudao Logistics Group, China) successfully imported the first batch of tapioca starch from Laos, totaling over 3,000 tons, which arrived at Nansha Port (Guangzhou) and was smoothly delivered. This marks an important step in the strategy to expand the import market for agricultural products from Southeast Asia, including items like cassava, natural rubber, and coconut milk. In the future, the company plans to utilize the China-Laos railway to broaden distribution, strengthen internal cooperation, scale up operations, diversify imported products, and support the “resources to Sichuan” strategy.

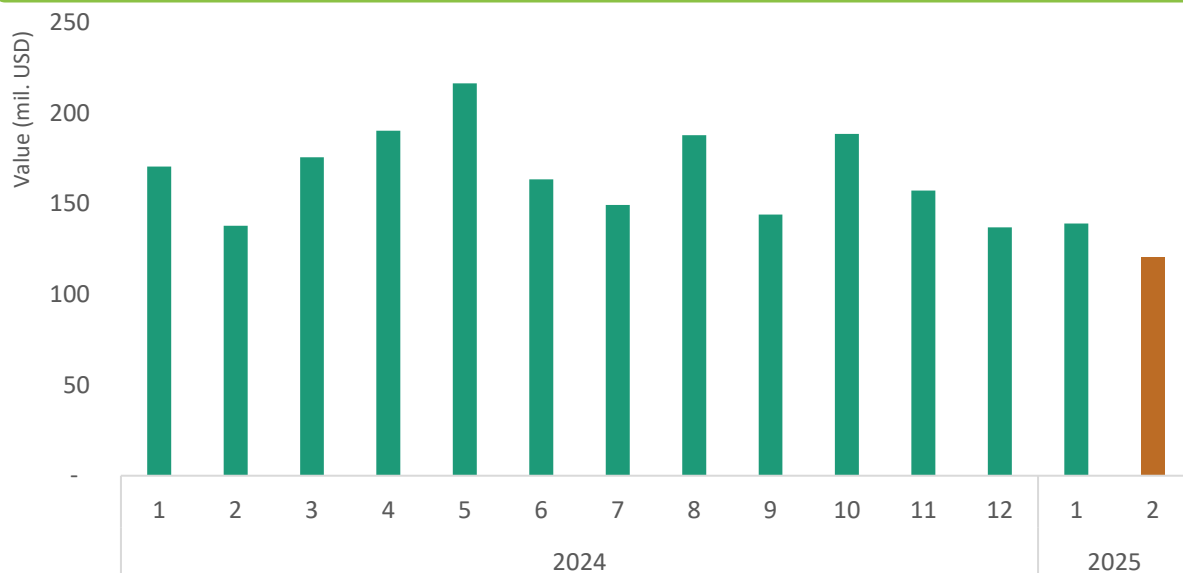
Source: shudaojt.com





WOOD & WOODEN PRODUCTS

Export volume and value to China, Feb-2025



Export results to China, Feb-2025



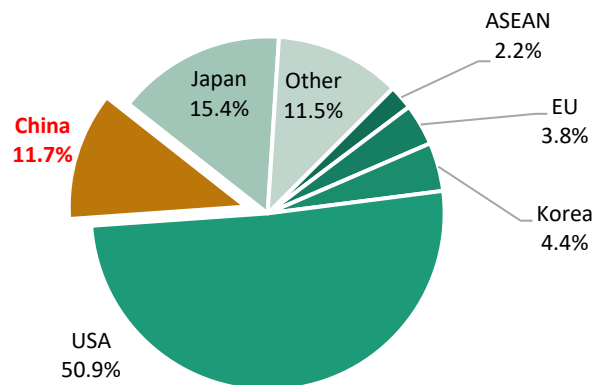
Decreases **13.5%** compared to Jan-2025

Decreases **12.8%** compared to Feb-2024

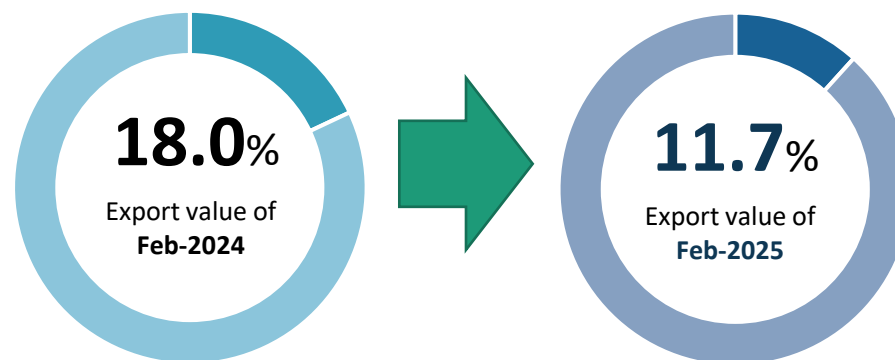
↓ **47.84 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **259.4 mil. USD**, **12.9%** of total 2024

Percentage of export value to China, Feb-2025



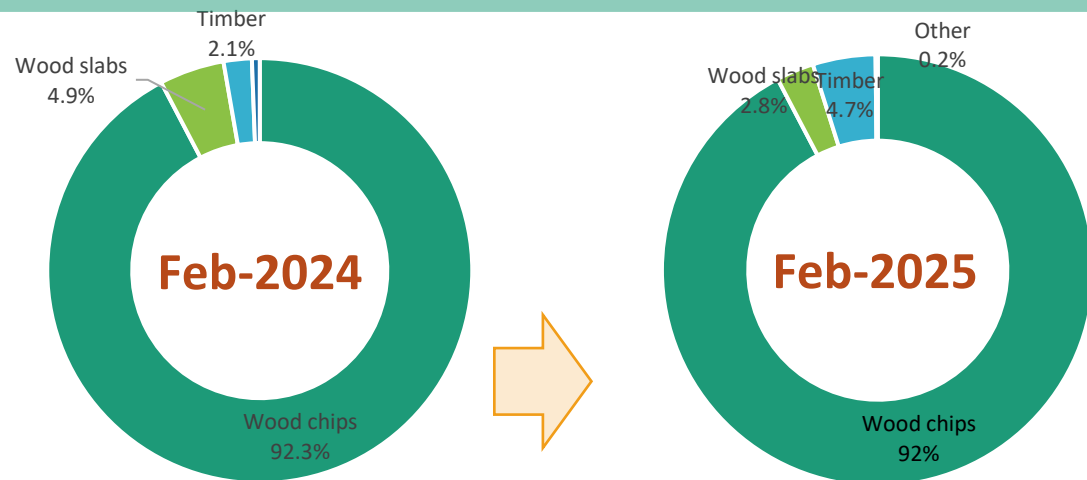
Changes in percentage of export value to China, Feb-2025



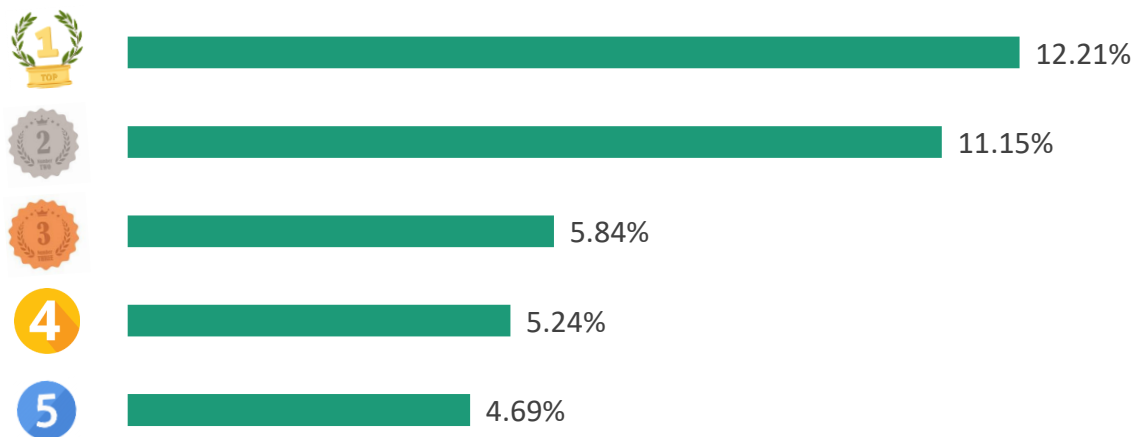


WOOD & WOODEN PRODUCTS

Structure of exports by products to China, Feb-2025



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



Export results to China, Feb-2025



Wood chips

Value: **110.2** mil. USD

Decreases **16%** compared to Jan-2025

Decreases **12%** compared to Feb-2024



Timber

Value: **5.6** mil. USD

Increases **48%** compared to Jan-2025

Increases **92%** compared to Feb-2024



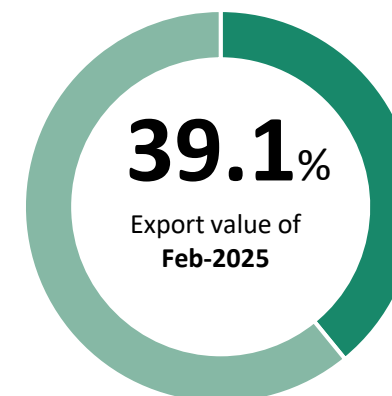
Wood slabs

Value: **3.4** mil. USD

Increases **12%** compared to Jan-2025

Decreases **50%** compared to Feb-2024

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





SPOTLIGHTS

China adjusted import tariffs on certain wood products in 2025 to stimulate domestic demand and improve production standards. The country's forestry sector reached a production value of 10.17 trillion yuan (USD 1,385.7 billion) in 2024, marking a 9.6% increase compared to the previous year, thanks to an 8% rise in timber output.

The GTI-China Index (GTI stands for Global Timber Index) reached 44.1% in February 2025, up 4.6% from the previous month, indicating that the decline in the wood sector has slowed, and businesses are optimistic about market trends over the next six months.



CASHEW NUTS

Export value and volume to China, Feb-2025



Export results to China, Feb-2025

VALUE
26.55 mil. USD

↗ Increases **47.5%** compared to Jan-2025

↗ Increases **129%** compared to Feb-2024

↓ **35.5 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **44.6 mil. USD, 6%** of total 2024

VOLUME
4.142 tons

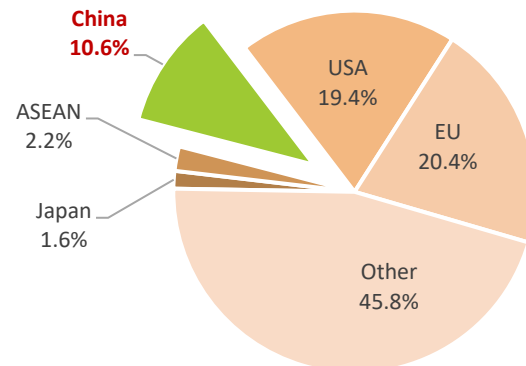
↗ Increases **48.5 %** compared to Jan-2025

↗ Increases **106%** compared to Feb-2024

↓ **6.4 thousand tons** less than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **6.9 thousand tons, 5%** of total 2024

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



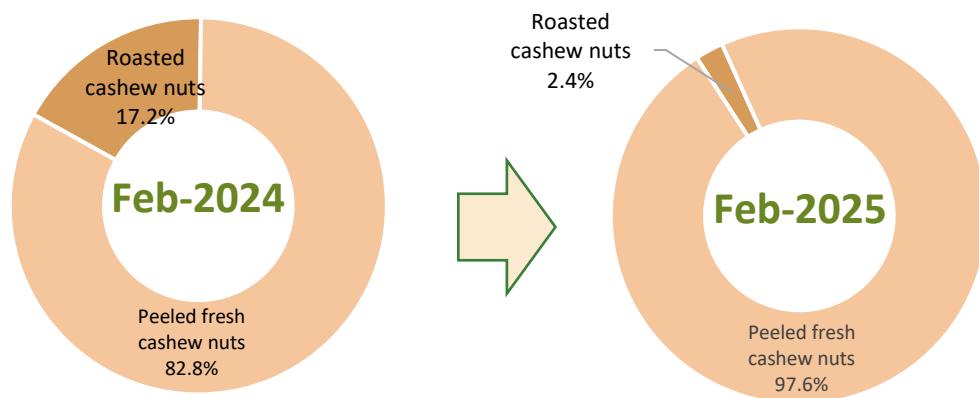
Changes in percentage of export value to China, Nov-2023



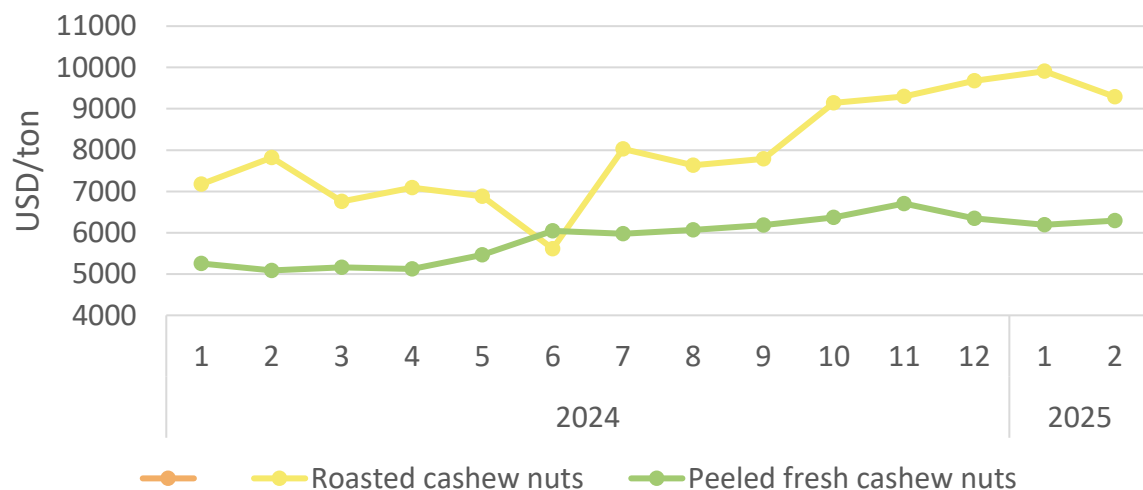


CASHEW NUTS

Structure of exports by products to China, Feb-2025



Average export cashew nuts price to China, Feb-2025



Export results to China, Feb-2025



Peeled fresh cashew nuts

Value: **25.9** mil. USD

Increases **58%** compared to Jan-2025

Increases **171%** compared to Feb-2024



Roasted cashew nuts

Value: **0.65** mil. USD

Decreases **56%** compared to Jan-2025

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

Peeled fresh cashew nuts

The average export price in Feb-2025 is **6.292** USD/ton; **increases 1.7%** compared to the previous month; and **increases 24%** compared to the same month of 2024.

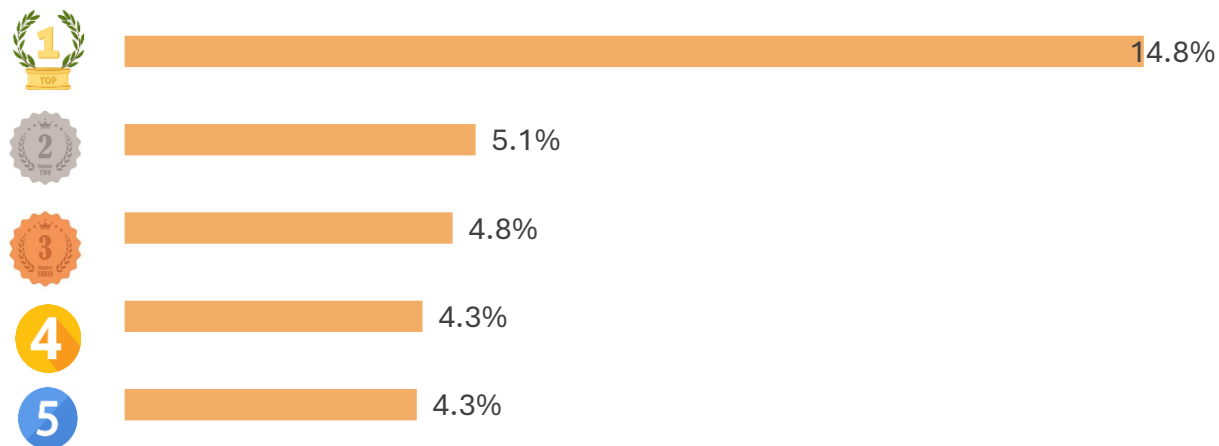
Roasted cashew nuts

The average export price in Feb-2025 is **9.292** USD/ton; **decreases 6.2%** compared to the previous month; and **increases 19%** compared to the same month of 2024.

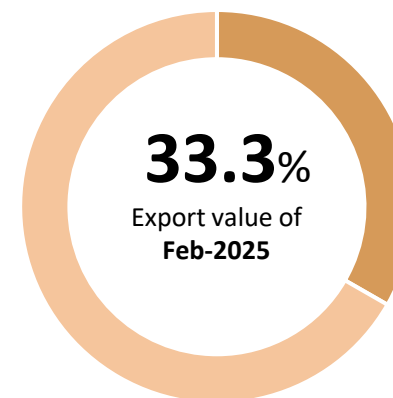


CASHEW NUTS

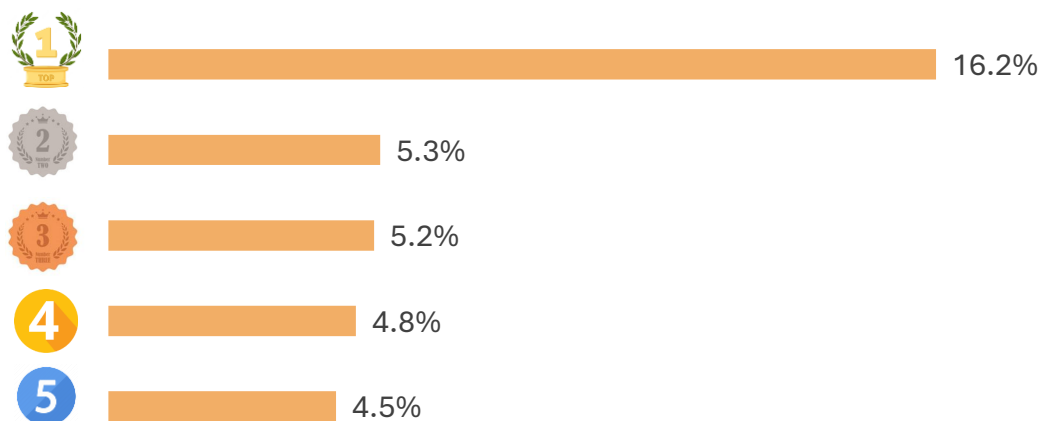
TOP 5 export enterprises by value to China, Feb-2025



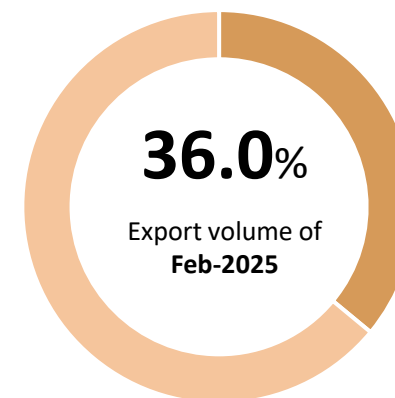
Value ratio of TOP 5 export enterprises to China, Feb-2025



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



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



CASHEW NUTS



SPOTLIGHTS

China is interested in bringing Cambodian cashew nuts to the international market

On March 11, 2025, the Council for the Development of Cambodia welcomed a delegation of 19 Chinese enterprises led by the Chairman of the Yunnan Young Entrepreneurs Association. These companies operate in various sectors and express their desire to expand their investment in Cambodia.

During the meeting, the Cambodian authorities emphasized the strong cooperative relationship with China and encouraged investment in the agricultural processing sector, particularly the cashew nut. Cambodia also called on businesses to explore opportunities across the entire cashew value chain, from collecting and preservation to processing.

Chinese representative of the Yunnan Young Entrepreneurs Association expressed their interest in securing a reliable supply of cashew nuts to bring Cambodian cashews to international markets. The other delegates also showed keen interest in Cambodia's investment environment.

Source: jianhuadaily.com



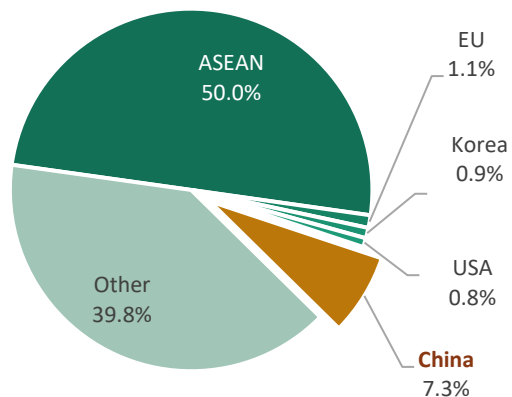


RICE

Export volume and value to China, Feb-2025



Percentage of export value to China, Feb-2025



Export results to China, Feb-2025

VALUE
26.1 mil. USD \$

Increases **167.0%** compared to Jan-2025

Increases **2.5 times** compared to Feb-2024

↑ **12.1 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **35.9 mil. USD, 21.4%** of total 2024

VOLUME
54.9 thousand tons

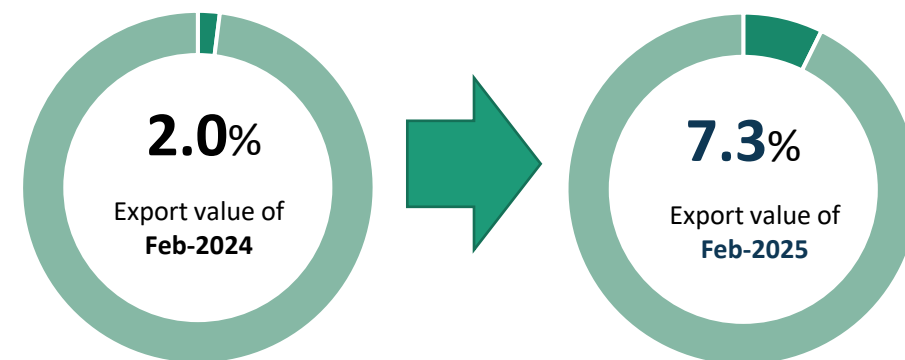
Increases **203.3%** compared to Jan-2025

Increases **3.3 times** compared to Feb-2024

↑ **31.2 thousand tons** more than the monthly average rate in 2024

❖ Accumulated 2 months of 2025 reaches **73.1 thousand tons, 25.6%** of total 2024

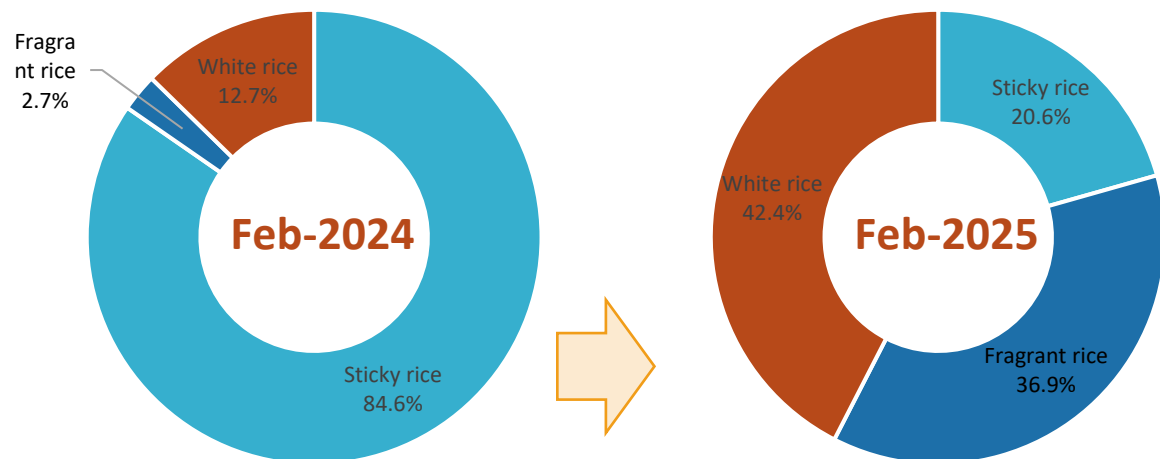
Changes in percentage of export value to China, Feb-2025



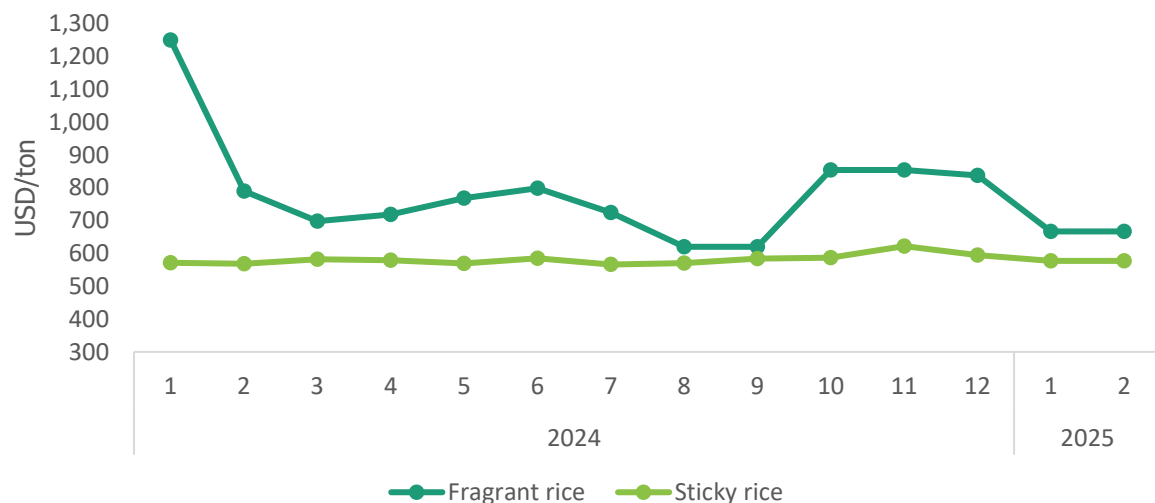


RICE

Structure of exports by products to China, Feb-2025



Average export rice price to China, Feb-2025



Export results to China, Feb-2025



Sticky rice

Value: **5.4** mil. USD

Increases **12%** compared to Jan-2025

Decreases **14%** compared to Feb-2024



Fragrant rice

Value: **9.6** mil. USD

3 times more than Jan-2025

47 times more than Feb-2024



White rice

Value: **11.1** mil. USD

3.3 times more than Jan-2025

10.7 times more than Feb-2024

Sticky rice

The average export price in Feb-2025 is **588** USD/ton; **increases 2%** compared to the previous month; and **increases 4%** compared to the same month of 2024.

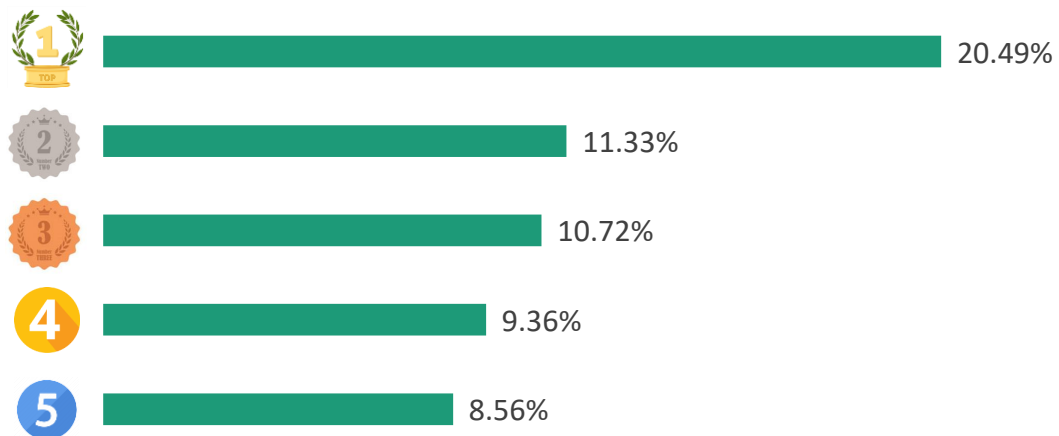
Fragrant rice

The average export price in Feb-2025 is **529** USD/ton; **decreases 21%** compared to the previous month; and **decreases 33%** compared to the same month of 2024.

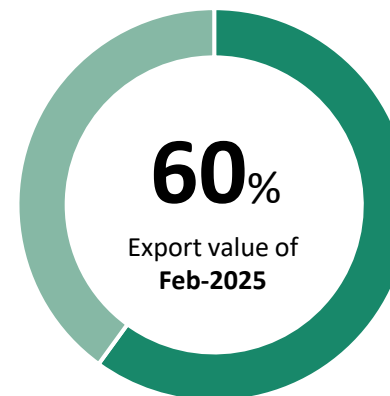


RICE

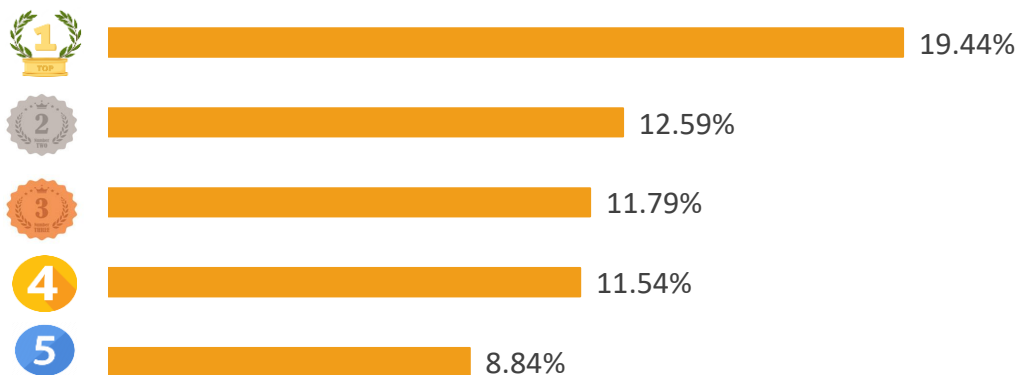
TOP 5 export enterprises by value to China, Feb-2025



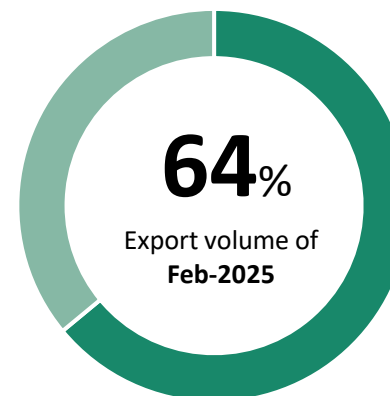
Value ratio of TOP 5 export enterprises to China, Feb-2025



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



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





RICE

SPOTLIGHTS



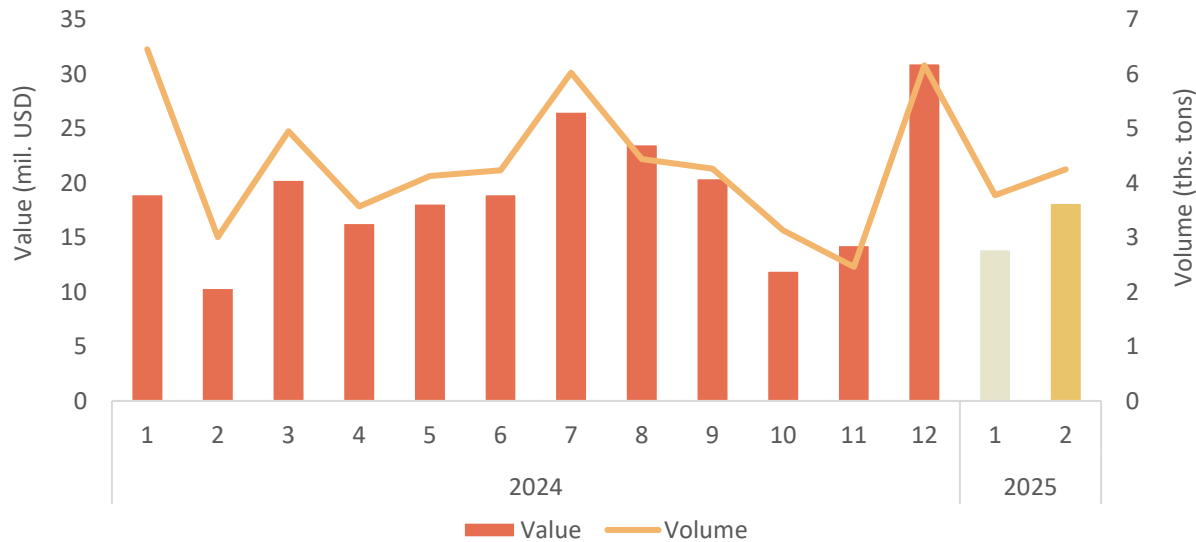
China's rice market is experiencing a strong growth due to increasing domestic consumption and rising demand for processed rice products. Technology advances in cultivation and automation have improved yield and quality, while government agricultural support policies play a vital role in sustaining this development. Rising disposable income in urban areas has also fueled demand for premium rice varieties.

The Chinese rice market is projected to continue expanding over the next decades, with a compound annual growth rate (CAGR) of 3.5% during the 2023–2030 period. High demand for organic and specialty rice, along with government support for enhancing food security, will be key drivers of this growth. The market will also benefit from innovations in packaging and distribution, opening up export opportunities and reinforcing China's position as one of the world's leading rice exporters.

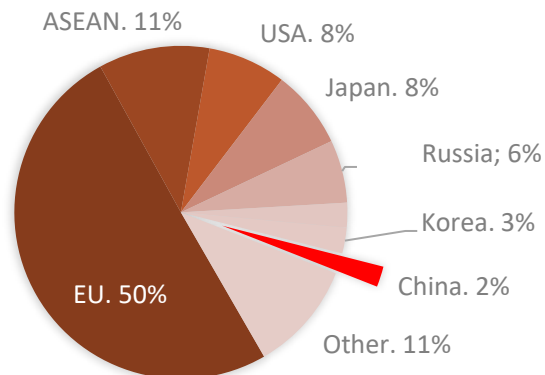


COFFEE

Export volume and value to China, Feb-2025



Percentage of export value to China, Feb-2025



Export results to China, Feb-2025

VALUE
18.2 mil. USD

↗ Increases **30.6%** compared to Jan-2025

↗ Increases **75.5%** compared to Feb-2024

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

❖ Accumulated 2 months of 2025 reaches **32.1** mil. USD, **13.9%** of total 2024.

VOLUME
4.3 thousand tons

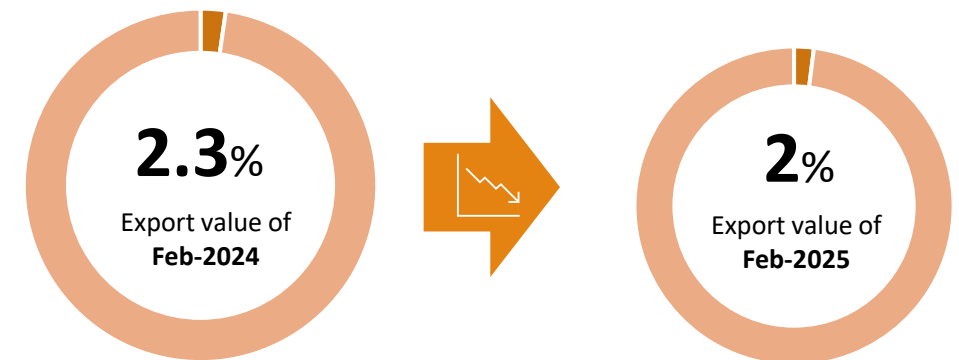
↗ Increases **12.7%** compared to Jan-2025

↗ Increases **41.5%** compared to Feb-2024

⬇ **0.1 ths. tons** less than the monthly average rate in 2024.

❖ Accumulated 2 months of 2025 reaches **8** ths.tons, **15.2%** of total 2024.

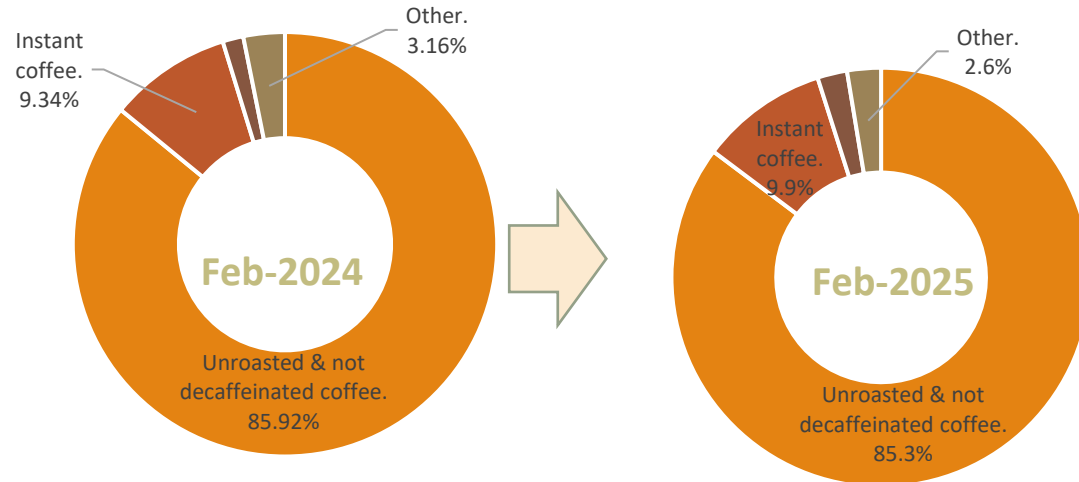
Changes in percentage of export value to China, Feb-2025



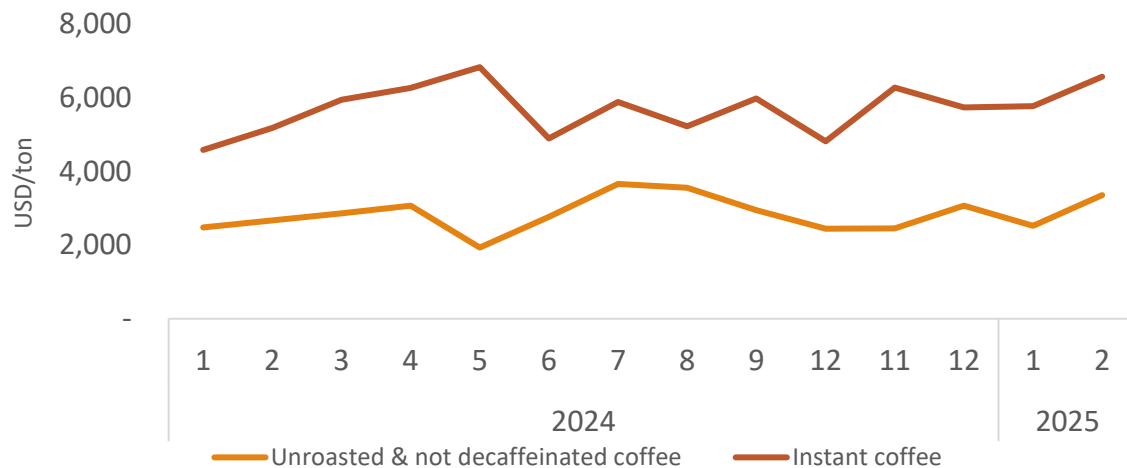


COFFEE

Structure of exports by products to China, Feb-2025



Average export price to China, Feb-2025



Export results to China, Feb-2025



Unroasted & not decaffeinated coffee

Value: **11** mil. USD
Increases **29.3%** compared to Jan-2025
Increases **137%** compared to Feb-2024



Instant coffee

Value: **4.8** mil. USD
Increases **9%** compared to Jan-2025
Increases **95.4%** compared to Feb-2024



Roasted and not decaffeinated coffee

Value: **0.7** mil. USD
Increases **128%** so compared to Jan-2025
Increases **20.8%** compared to Feb-2024

Instant coffee

The average export price in Feb-2025 is **6.572** USD/ton. **increases 19.9%** compared to the previous month; and **increases 26.9%** compared to the same month of 2024.

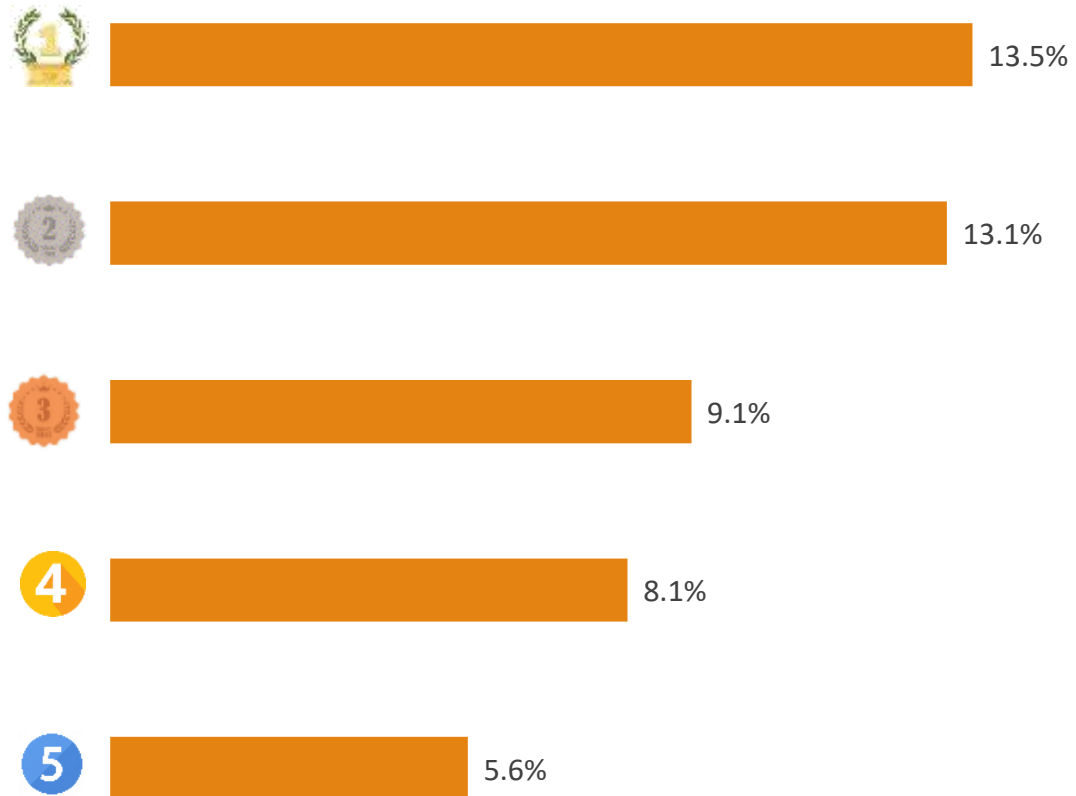
Unroasted & not decaffeinated coffee

The average export price in Feb-2025 is **3.357** USD/ton. **increases 33.2%** compared to the previous month; and **increases 25.7%** compared to the same month of 2024.

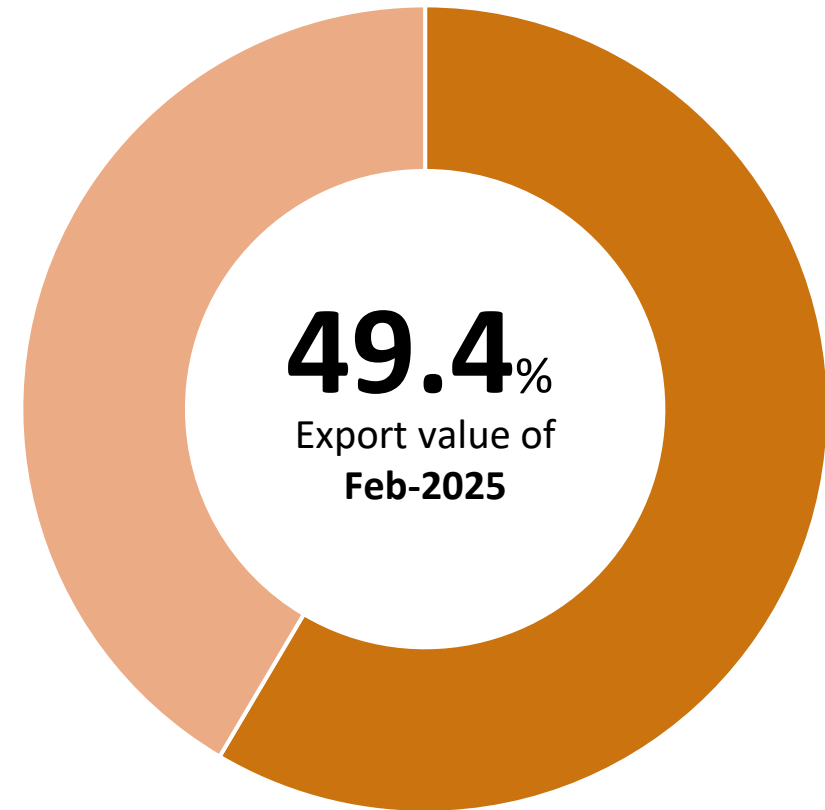


COFFEE

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



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





COFFEE

SPOTLIGHTS




The coffee craze is spreading to small cities in China thanks to affordable prices

Growth in district-Level Markets

Chains like **Lucky Cup** (a brand under Mixue Bingcheng) are expanding rapidly to county-level areas.

Price: only ~6 RMB/cup (≈ 0.83 USD) → Revenue reached nearly **800,000 RMB** in less than 10 months in **Huojia district, Henan Province**.

Store Chain Expansion

- **Lucky Cup:** >5,000 stores, with **61.5%** located in **third-level cities and below**
- **Starbucks:** As of Q1/2025, opened in **over 1,000 counties/towns**
-  **Data from Meituan (2024)**
-  Coffee delivery orders in districts: **+97%**
-  Number of coffee shops: **+159%**

Source: chinadaily.com.cn





"China's Coffee Import and Export Situation in February 2025"

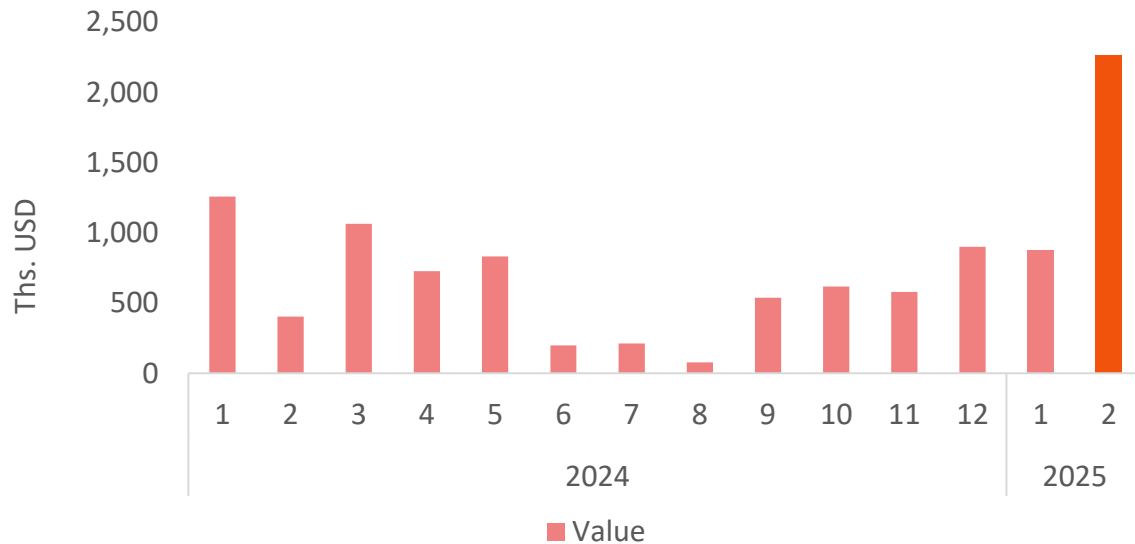
Trade Overview

- Exports: 15.8 million USD
- Imports: 91.9 million USD
- Trade deficit: 76.1 million USD
-  Compared to Jan-2025:
-  **Exports increased by 3.85 million USD (+32.2%)**
-  **Imports decreased by 7.54 million USD (-7.58%)**
- **Main export markets:** Netherlands: 5.32 mil. USD, Germany: 3.3 mil.USD
-  **Main import market:** Brazil: 45.5 mil.USD
-  **Year-over-year growth**
-  **Exports surged: +181%**
 - Significant increase from the Netherlands, Germany, and Hong Kong
-  **Imports slightly declined: -4.64%**
 - Decrease from Colombia, USA, and Tanzania



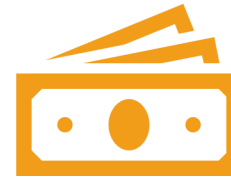
MEAT AND MEAT PRODUCTS (EXPORT)

Export value to China, Feb-2025



Export results to China, Feb-2025

VALUE



2.26
mil. USD

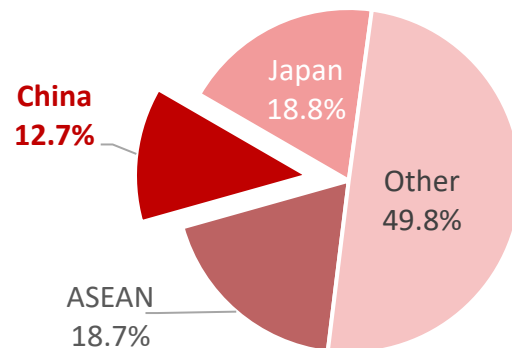
↗ Increases **157.2%** compared to Jan-2025

↗ Increases **458.9%** compared to Feb-2024

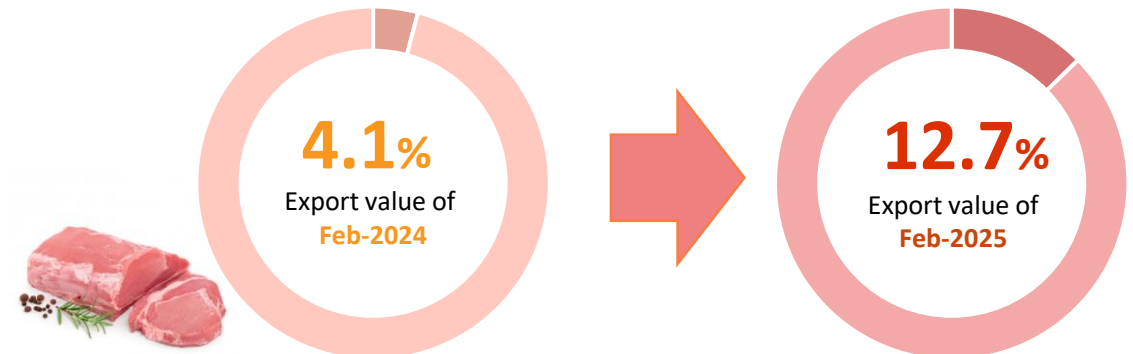
↗ **1.64 mil. USD** more than the monthly average rate in 2024

◇ Accumulated 2 months of 2025 reaches **3.1 mil. USD**. **42.4%** of total 2024

Percentage of export value to China, Feb-2025



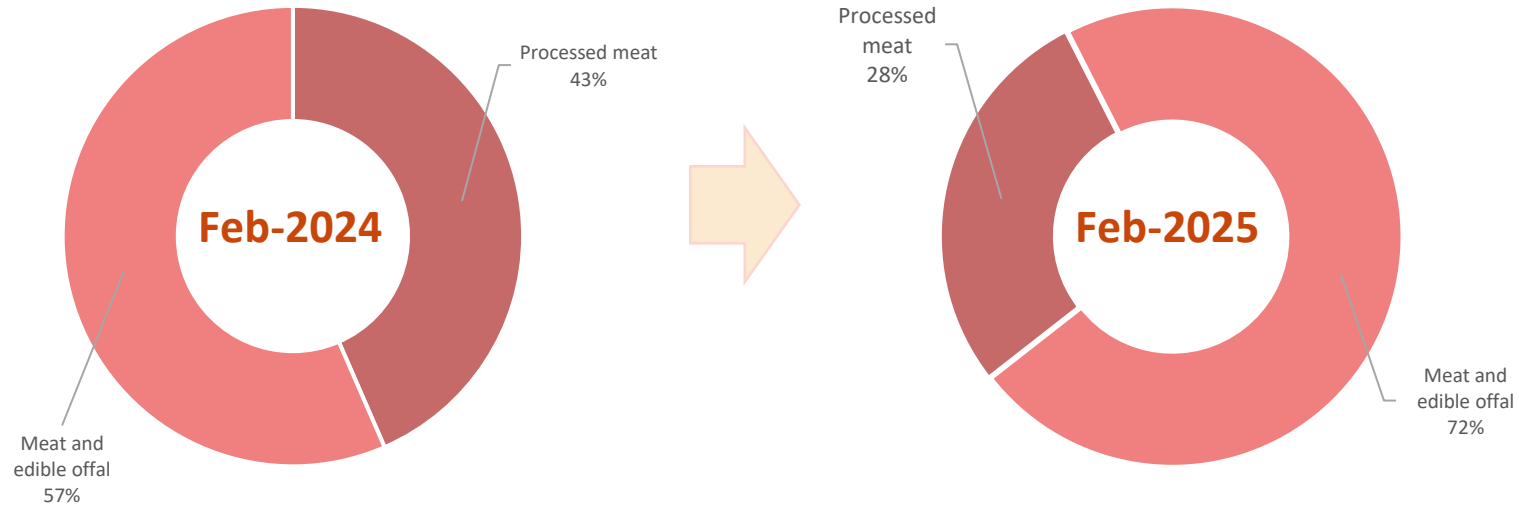
Changes in percentage of export value to China, Feb-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to China, Feb-2025



Export results to China, Feb-2025



Meat and edible offal

Value: **1.63** mil. USD

Increases **119.6%** compared to Jan-2025

Increases **611.4%** compared to Feb-2024



Processed meat

Value: **634.7** mil. USD

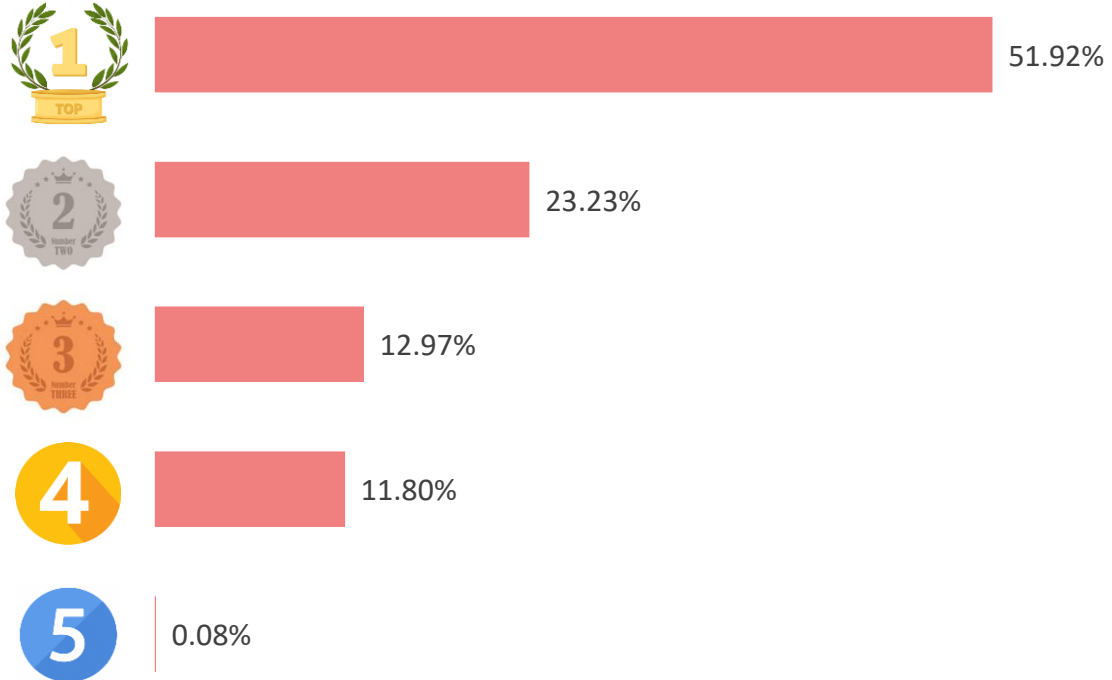
Increases **358.2%** compared to Jan-2025

Increases **260.6%** compared to Feb-2024

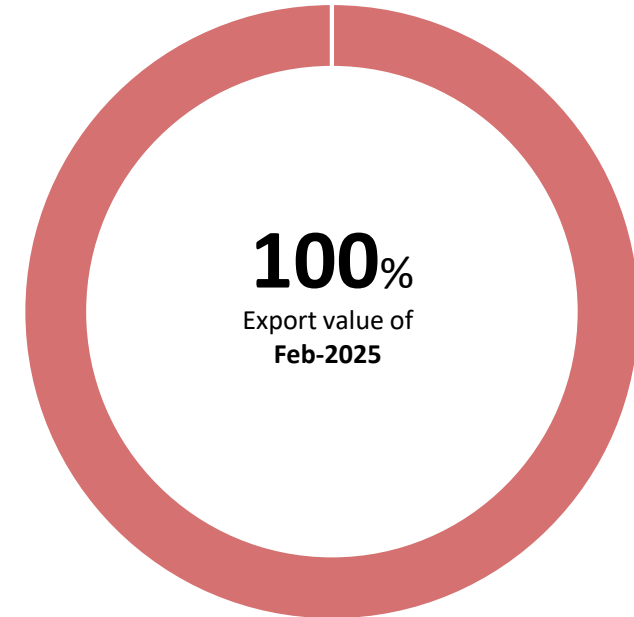


MEAT AND MEAT PRODUCTS (EXPORT)

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



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





MEAT AND MEAT PRODUCTS

SPOTLIGHTS



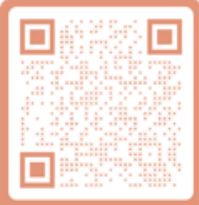
On March 16, the General Administration of Customs of China decided to extend import licenses for U.S. exporters of chicken and pork, while licenses for U.S. beef exporters are not renewed. This decision has affected more than 350 U.S. beef processing facilities.

According to market sources, the decision not to renew beef import licenses may be related to an investigation into the impact of beef imports on domestic market prices.

Source: Agromeat.com

The General Administration of Customs of China announced a temporary suspension of beef imports from six factories in Brazil, Argentina, and Uruguay. This decision is issued in the context of the investigation launched by China's Ministry of Commerce into beef import activities since December 2024. As the world's largest importer and consumer of meat, China is currently facing an oversupply situation, driving domestic meat prices to the lowest levels in years.

Source: Agromeat.com



Any comments. please send to:

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