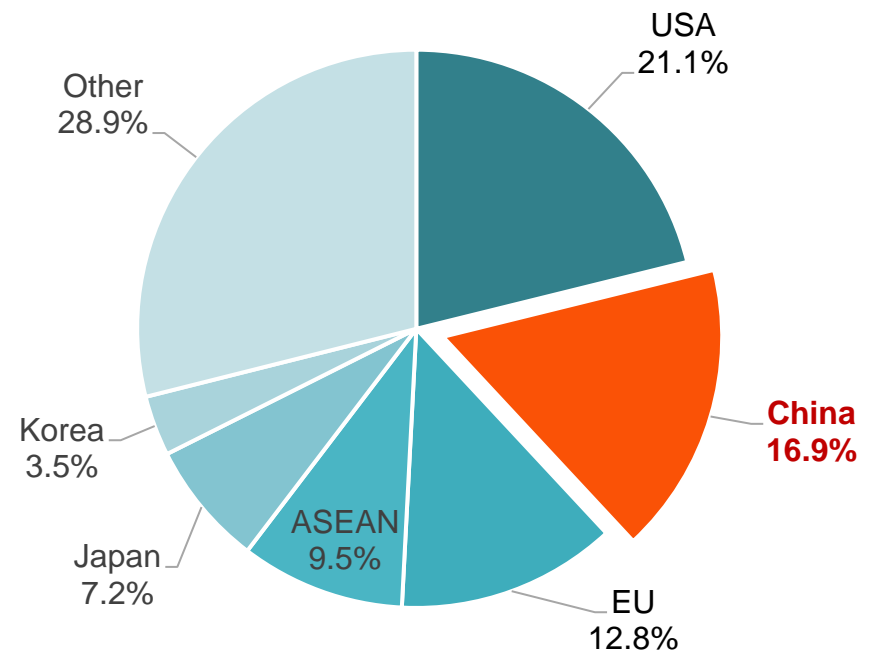


MONTHLY REPORT ON
AGRI-PRODUCT EXPORT
**FROM VIETNAM TO
CHINA MARKET**



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

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

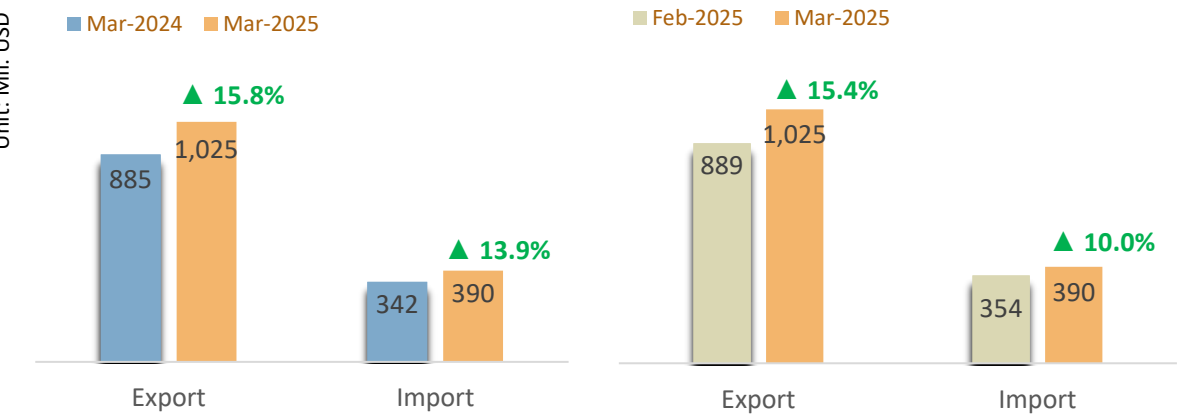


Changes in percentage of AFF product export value to the China, Mar-2025 compared to Feb-2025 and Mar-2024

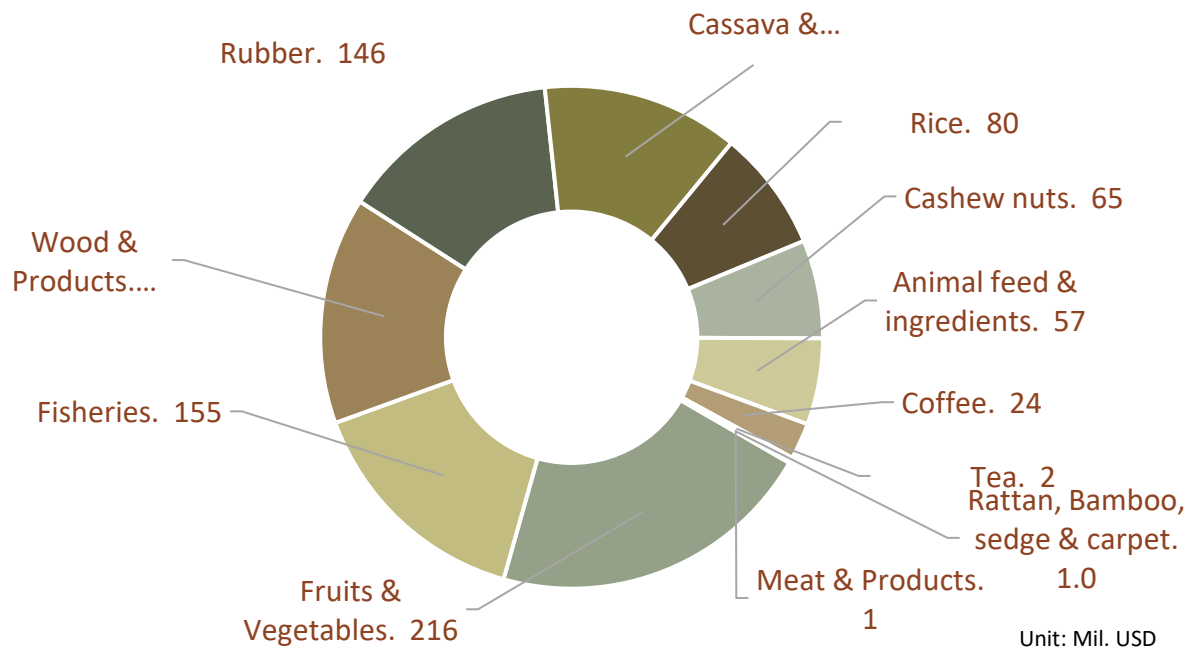
	Value (Mil.USD)	compared to Feb-2025	compared to Mar-2024
USA	1,281	▲ 2.8%	▲ 0.9%
China	1,025	▲ 0.1%	▲ 0.3%
EU	772	▼ 1.6%	▲ 2.2%
ASEAN	577	▼ 0.5%	▼ 5.6%
Japan	438	▼ 0.6%	▲ 0.4%
Korea	211	▼ 0.1%	▼ 0.3%
Total value of	6,056		

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

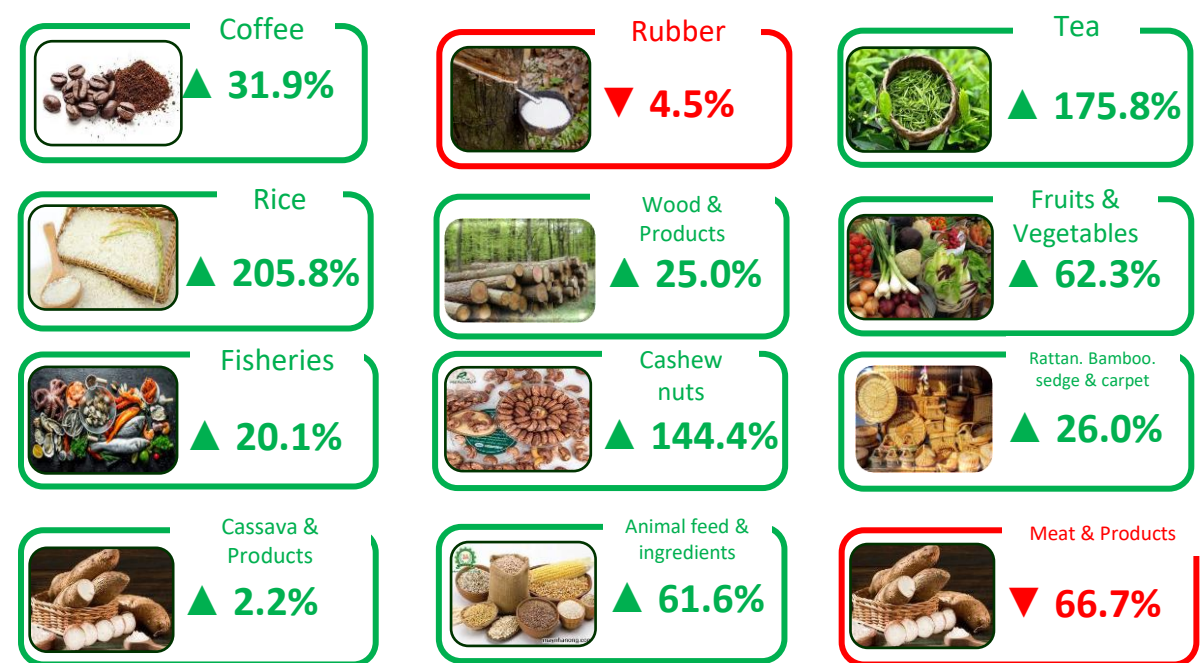
AFF product import-export turnover between Vietnam and China, Mar-2025



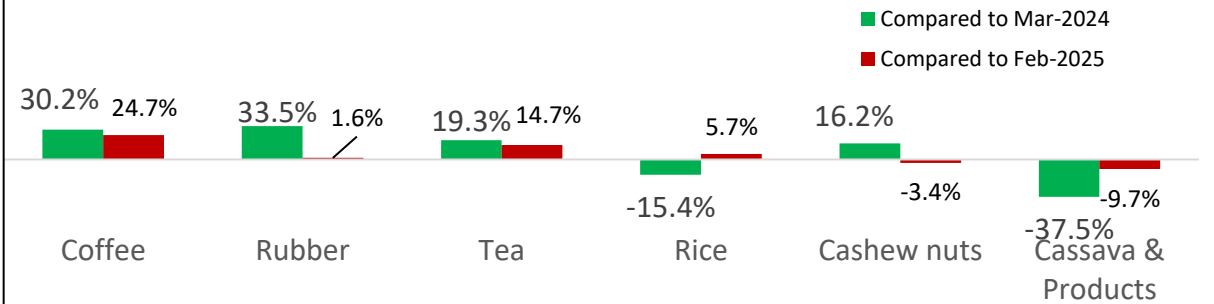
Key AFF product export value to China, Mar-2025



Changes in key AFF product export value to China in Mar-2025 compared to Feb-2025



Changes in average export value of key AFF products to China in Mar-2025 compared to Mar-2024 and compared to Feb-2025



Source: Calculated from data of the Department of Customs

Comprehensive view of the U.S & China Tariff Tensions

Since early 2025, the U.S.–China tariff war has escalated, with both sides impose multiple retaliatory measures.

On 4 February, a 10% tariff was imposed on Chinese goods; on the same day, China responded with 10–15% duties on some U.S. products.

From 10 February to 15 April, both countries repeatedly raised their import tariffs—up to 125% on U.S. goods and 245% on Chinese goods.

This tariff tension had severe impacts on global supply chains and bilateral trade shrinking by as much as 80%. Under economic pressure, both sides held negotiations in Geneva, Switzerland, on May 10.



Source: Baotintuc.vn

U.S. – China Reach 'Significant Agreement' to Reduce Trade Deficit

On May 11, 2025, the United States and China reached an important agreement to reduce the bilateral trade deficit after two days of negotiations. However, specific details of the agreement have not yet been disclosed.

This negotiation marked the first direct dialogue between two since they imposed import tariffs on over 100% of each other's goods. Washington's goal is not only to reduce the trade deficit but also to encourage China transferring its economic model from export-driven growth to domestic

consumption. China confirms that they will reject any proposal that harms core principles or global fairness objectives. The agreement is expected to ease trade tensions between the world's two largest economies and pave the way for re-establishing bilateral trade relations.



Source: Vnexpress.net



China Increases to Support the Economy

On April 26, the Communist Party of China held a meeting and announced a series of measures to support businesses and citizens who affected by trade tensions.

Beijing reaffirmed to implement a more proactive fiscal policy and a moderately loose monetary policy. In particular,

businesses affected by tariffs may receive additional support through China's unemployment insurance to retain their workers. Beijing also pledged to maintain a stable and active capital market, which is considered a key factor in reinforcing confidence on the world's second-largest economy.

IMF has downgraded its GDP growth forecast for China to 4% for both this year and next year, down by 0.6 and 0.5

percentage points respectively from the January forecast.



Source: Baomoi.com

China Opens Market for Some Vietnamese Agricultural Products

On the occasion of General Secretary and President of China, Mr Xi Jinping's visits Vietnam on April 14–15, leaders of both countries issued a Joint Statement. According to the Joint Statement, the two countries signed protocols for exporting Vietnamese products to China such as chili, passion fruit, raw bird's nests, cleaned bird's nests, and rice bran.

Additionally, China is actively processing official licensing procedures for other Vietnamese products such as citrus fruits and herbal medicines of plant origin. Conversely,

Vietnam will accelerate the import of sturgeon from China.

Both countries are also speeding up the construction of smart border gates at international crossings, including dedicated lanes for goods transportation at the Huu Nghi (Vietnam) – Youyi Guan (China) border gate.

China is willing to facilitate the early establishment of more Vietnamese Trade Promotion Offices in Haikou (Hainan) and other localities. Both countries will coordinate to improve customs clearance efficiency at border gates, openings, and border markets to ease congestion.

Source: Vnexpress.net





FRUITS & VEGETABLES (EXPORT)

Export volume and value to China, Mar-2025



Export results to China, Mar-2025

VALUE



215.7

mil. USD

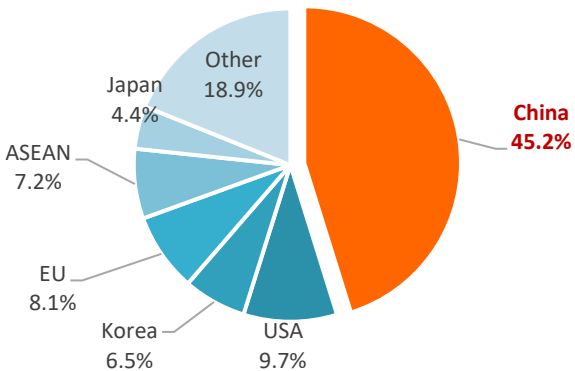
Increases **32.6%** compared to Feb-2025

Decreases **16.7%** compared to Mar-2024

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

Accumulated 3 months of 2025 reaches **521.2 mil. USD. 11.3%** of total 2024

Percentage of export value to China, Mar-2025



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

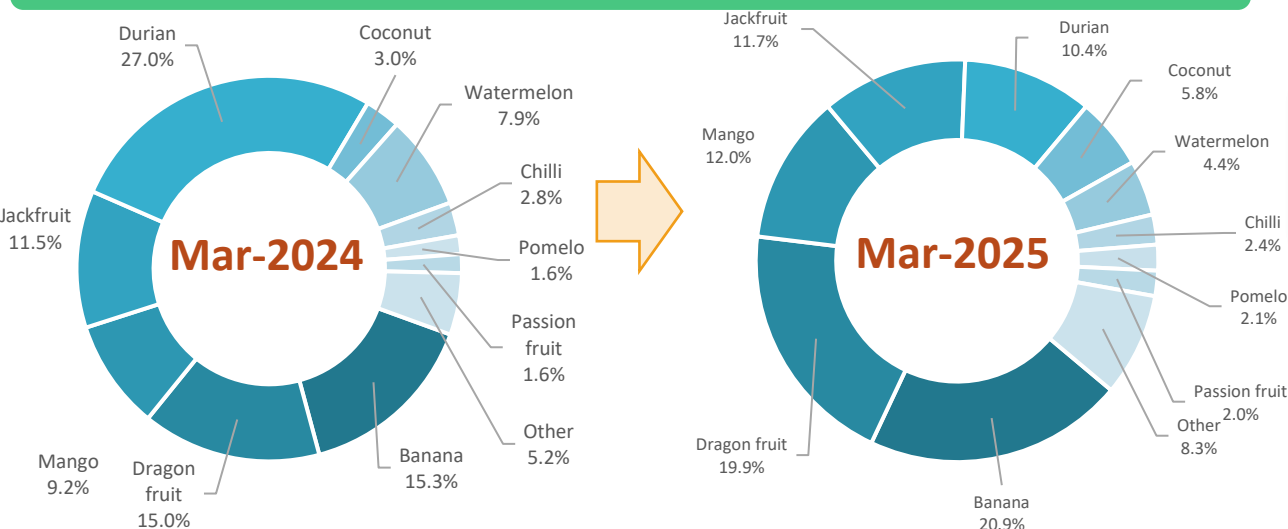


Source: Calculated from data of the Department of Customs



FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to China, Mar-2025



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



Banana

Value: **45.1** mil. USD

Increases **43.4%** compared to Feb-2025

Increases **14.1%** compared to Mar-2024



Dragon fruit

Value: **43.0** mil. USD

Increases **68.5%** compared to Feb-2025

Increases **10.6%** compared to Mar-2024



Mango

Value: **25.8** mil. USD

Increases **63.2%** compared to Feb-2025

Increases **8.3%** compared to Mar-2024



Jackfruit

Value: **25.3** mil. USD

Increases **38.8%** compared to Feb-2025

Decreases **15.3%** compared to Mar-2024



Durian

Value: **22.5** mil. USD

Increases **121.0%** compared to Feb-2025

Decreases **67.8%** compared to Mar-2024



Coconut

Value: **12.4** mil. USD

Increases **12.2%** compared to Feb-2025

Increases **61.4%** compared to Mar-2024



Watermelon

Value: **9.6** mil. USD

Increases **59.2%** compared to Feb-2025

Decreases **53.2%** compared to Mar-2024



Chilli

Value: **5.2** mil. USD

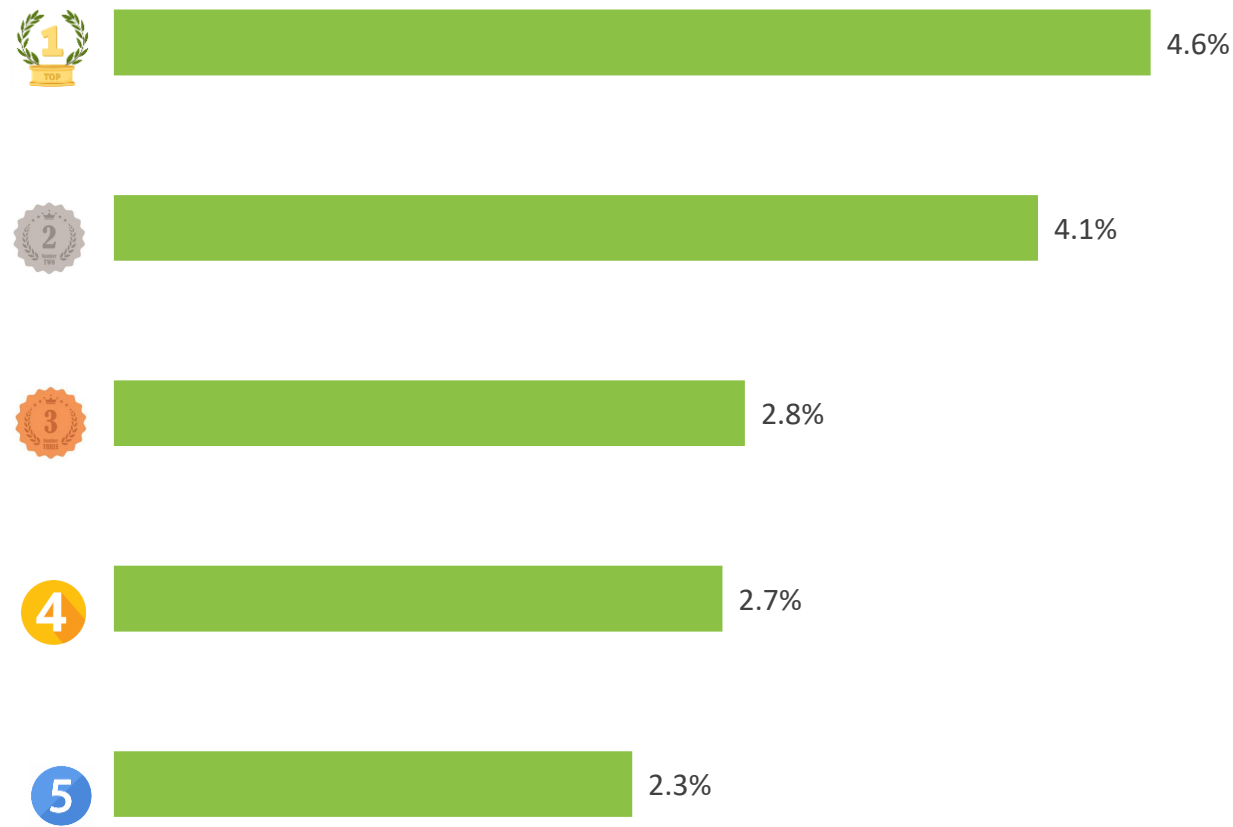
Increases **198.1%** compared to Feb-2025

Decreases **27.6%** compared to Mar-2024

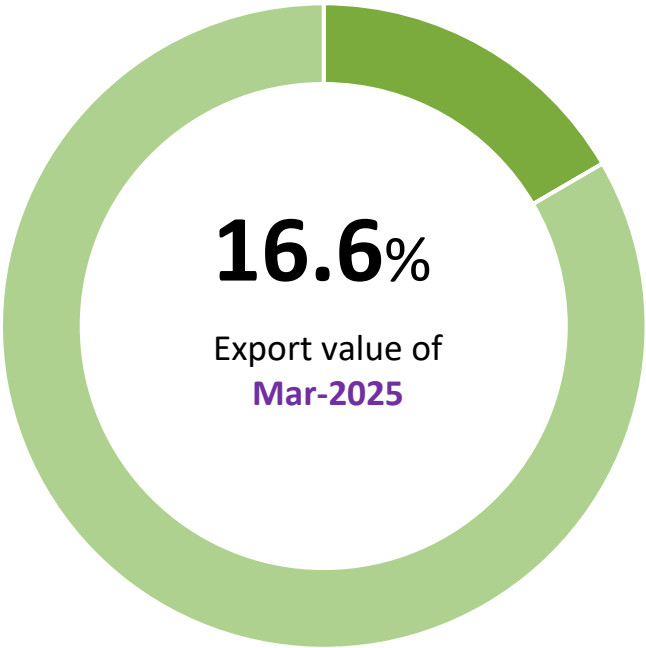


FRUITS & VEGETABLES (EXPORT)

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



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

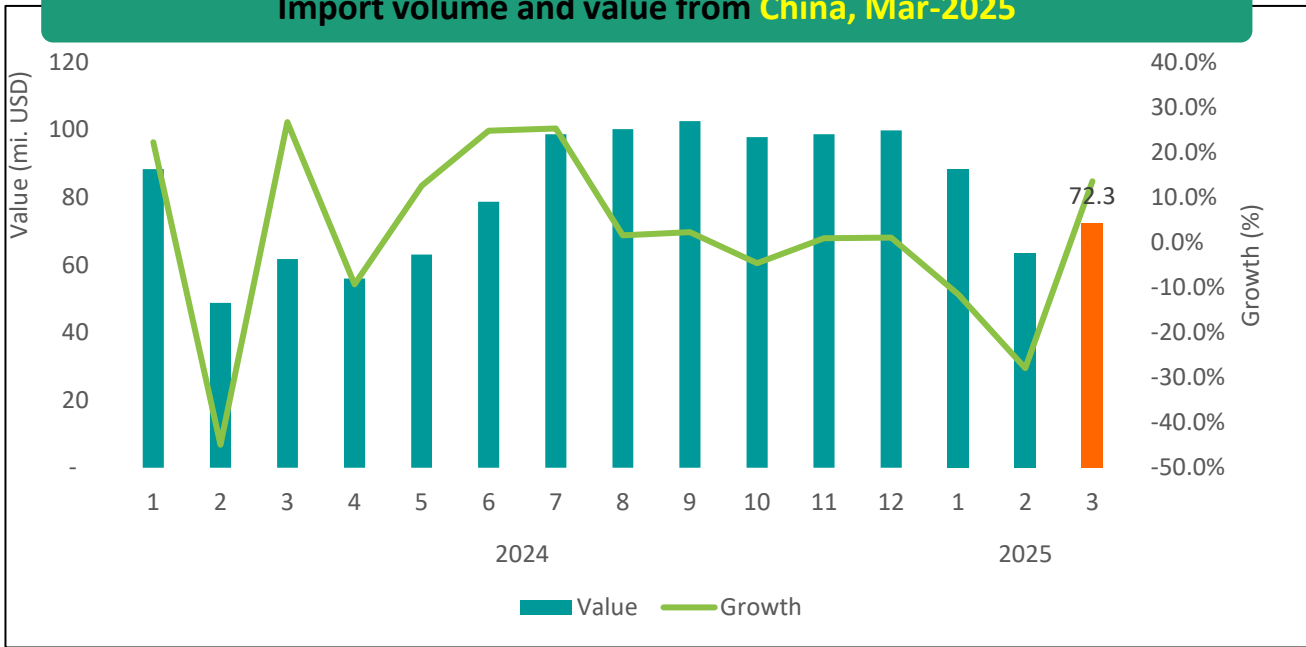


Source: Calculated from data of the Department of Customs



FRUITS & VEGETABLES (IMPORT)

Import volume and value from China, Mar-2025



Import results from China, Mar-2025

VALUE



72.3

mil. USD

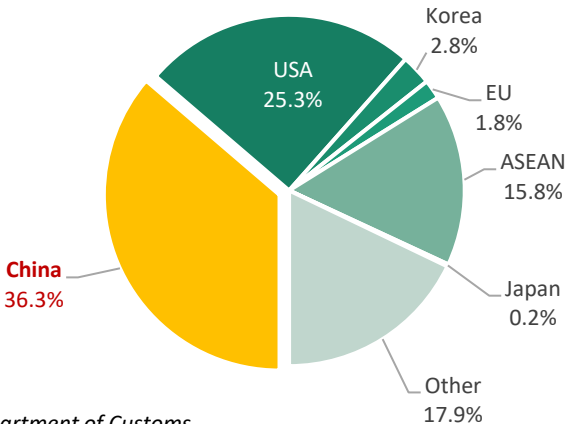
Increases **13.6%** compared to Feb-2025

Increases **17.1%** compared to Mar-2024

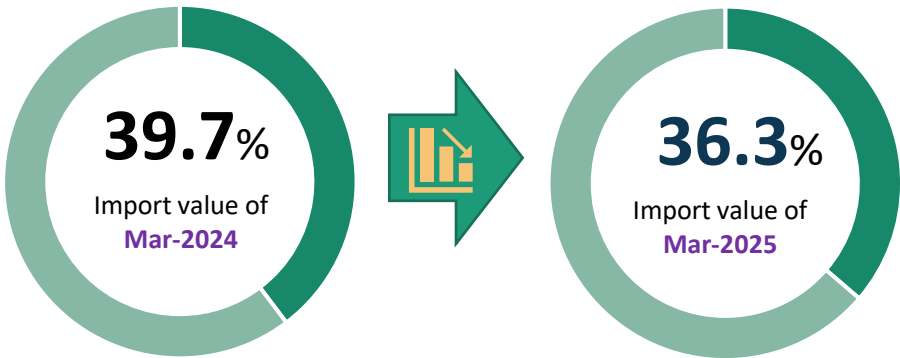
10.5 mil. USD less than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **224.2 mil. USD. 22.6%** of total 2024

Percentage of import value from China, Mar-2025



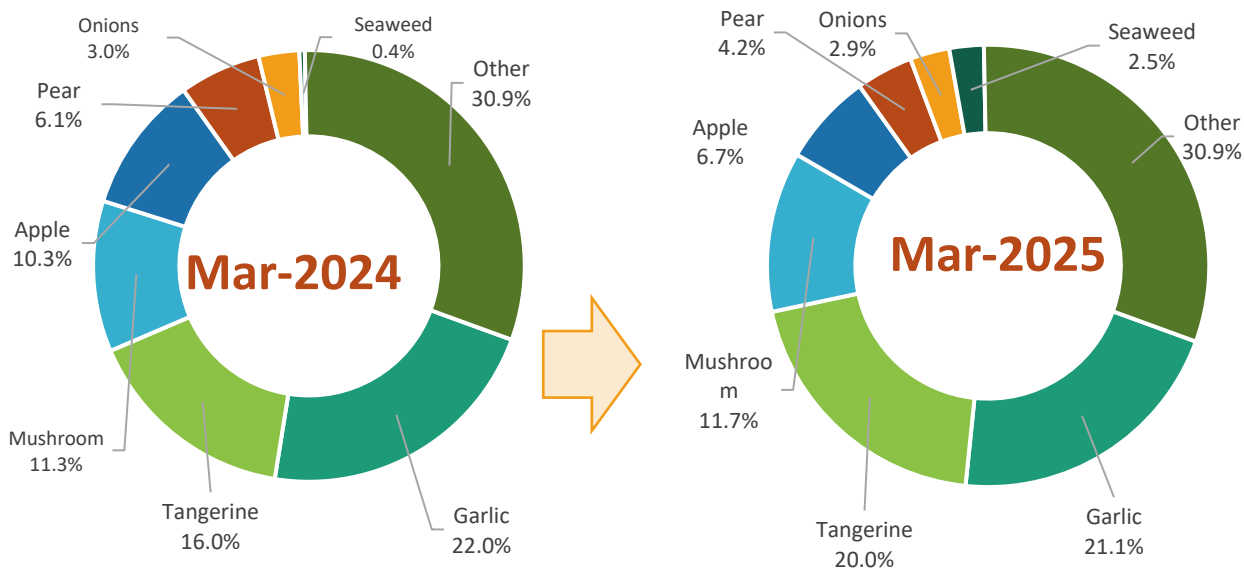
Changes in percentage of import value from China, Mar-2025





FRUITS & VEGETABLES (IMPORT)

Structure of imports by products from China, Mar-2025



Apple

Value: **4.9** mil. USD

Decreases **7.5%** compared to Feb-2025

Decreases **23.3%** compared to Mar-2024



Pear

Value: **3.0** mil. USD

Increases **11.5%** compared to Feb-2025

Decreases **20.0%** compared to Mar-2024



Garlic

Value: **15.2** mil. USD

Decreases **15.9%** compared to Feb-2025

Increases **12.2%** compared to Mar-2024



Tangerine

Value: **14.5** mil. USD

Increases **74.3%** compared to Feb-2025

Increases **46.4%** compared to Mar-2024



Mushroom

Value: **8.5** mil. USD

Increases **13.1%** compared to Feb-2025

Increases **21.5%** compared to Mar-2024



Onions

Value: **2.1** mil. USD

Decreases **12.6%** compared to Feb-2025

Increases **10.9%** compared to Mar-2024

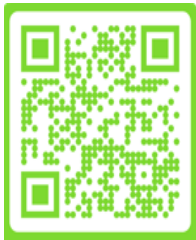


Seaweed

Value: **1.8** mil. USD

Increases **259.2%** compared to Feb-2025

Increases **627.3%** compared to Mar-2024



China Officially Opens Market to Fresh Durian from Cambodia

On April 28, 2025, the General Administration of Customs of China officially issued a notice on phytosanitary requirements for importing Cambodian durians, allowing the import of fresh durian from Cambodia that meets relevant requirements. Before each export season, Cambodia must provide a list of durian exporting enterprises. The list will be published on the General Administration of Customs' website after approval and registration by China.

Source: Guojiguoshu.com

China's Durian Imports drop sharply in the first quarter of 2025

In the first quarter of 2025, China imported 39,459 tons of durian, worth USD 208 million, down 46.5% in volume and 48.1% in value compared to the same period in 2024. Thailand continued to lead durian exports to China, with a volume of 26,157 tons and a value of USD 145.5 million, down slightly by 4.1% in volume and 14.5% in value. China's durian imports from Vietnam dropped by 71.3% in volume and 74% in value, to only 12,924 tons worth USD 58.7 million. As a result, Vietnam's durian market share in China fell sharply from 56.4% to 28.2%.

Source: Vietnambiz.vn



Vietnam's Durian and Fruit Exports to China Continue to Decline Sharply

According to the Vietnam Fruit and Vegetable Association, as of April 21, Vietnam's fruit and vegetable export value reached nearly USD 453 million, down 5.3% compared to the previous month and over 25% year-on-year. In the first four months of 2025, the export value was about USD 1.6 billion, down more than 14% compared to the same period last year. The main reason is due to reducing durian exports.

Currently, China is still conducting 100% inspection of all durian shipments from Vietnam, resulting in long waiting times at border gates, which causes spoilage and quality degradation.

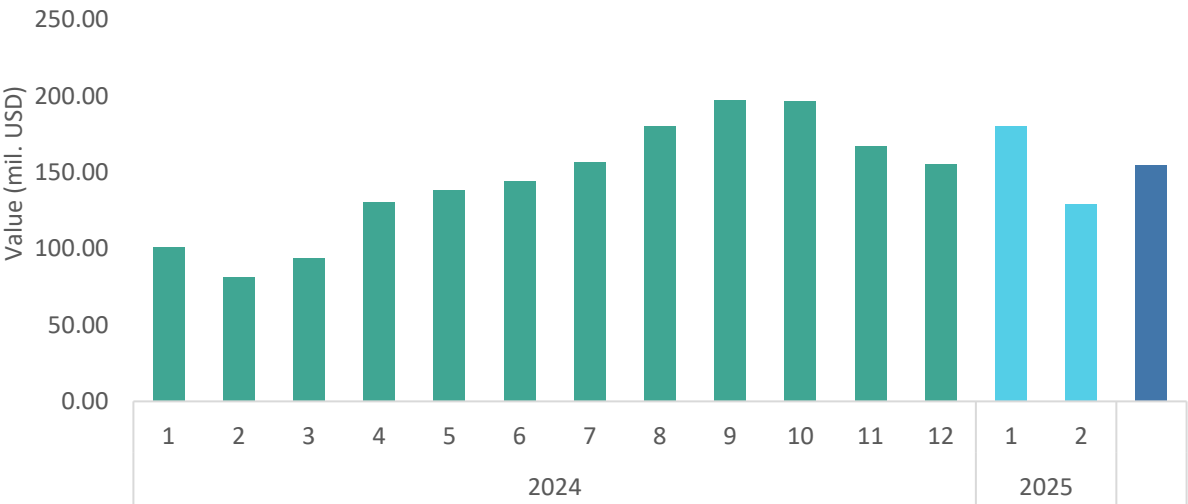
However, Vietnam's fruit and vegetable exports in the second quarter of 2025 is expected to increase significantly, especially following the state visit of General Secretary and President of China, Mr Xi Jinping to Vietnam on April 14–15, 2025. Durian exports are expected to rise due to strong supply and increasing demand from the Chinese market.

Source: Plo.vn

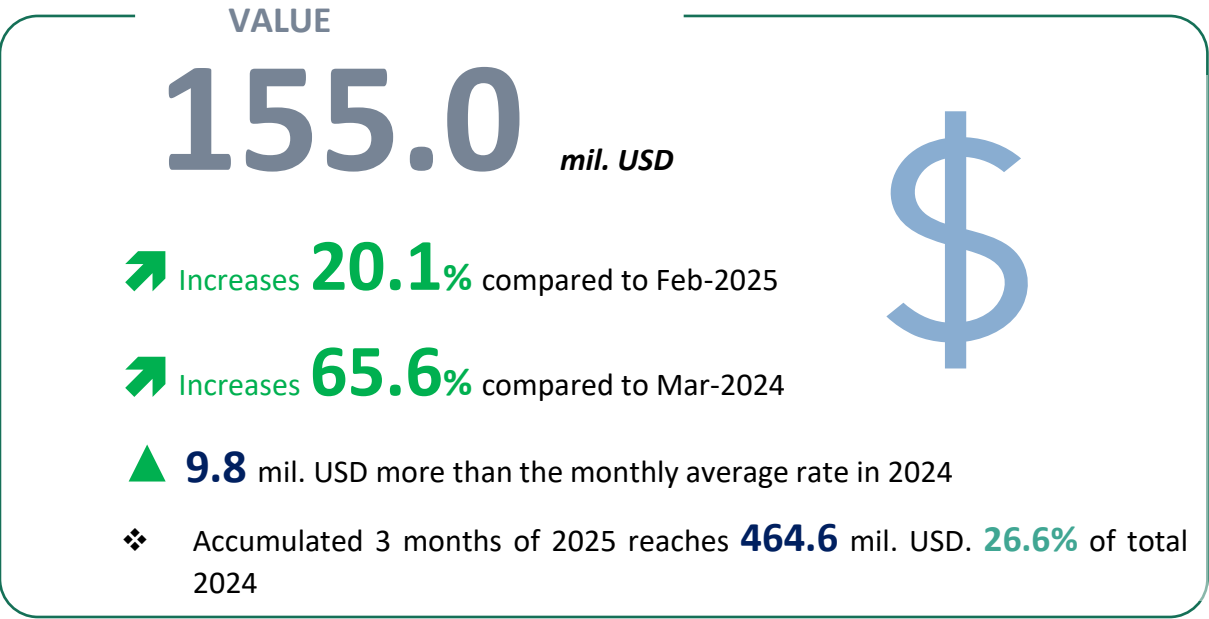


FISHERIES

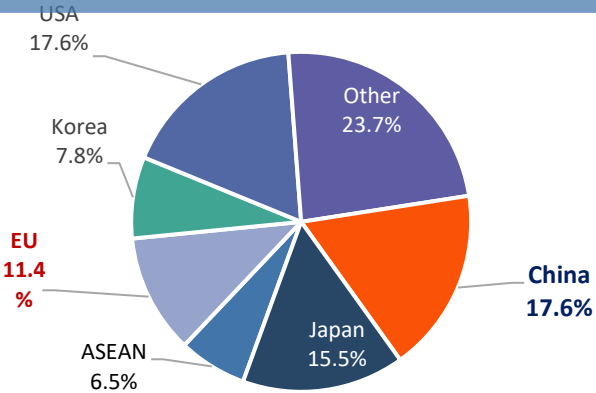
Export volume and value to China, Mar-2025



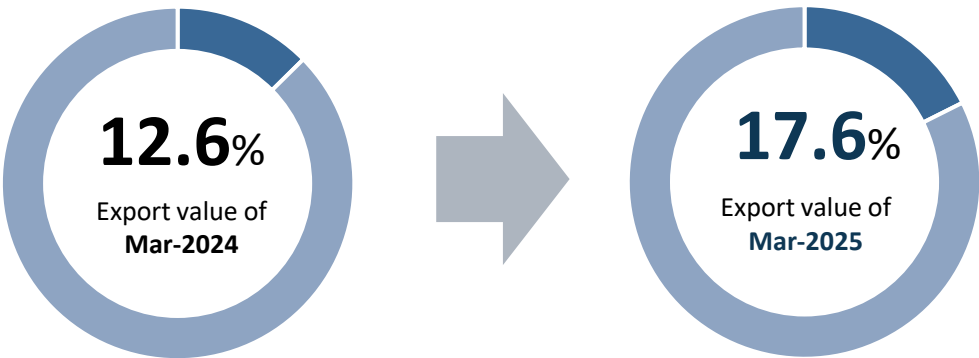
Export results to China, Mar-2025



Percentage of export value to China, Mar-2025



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

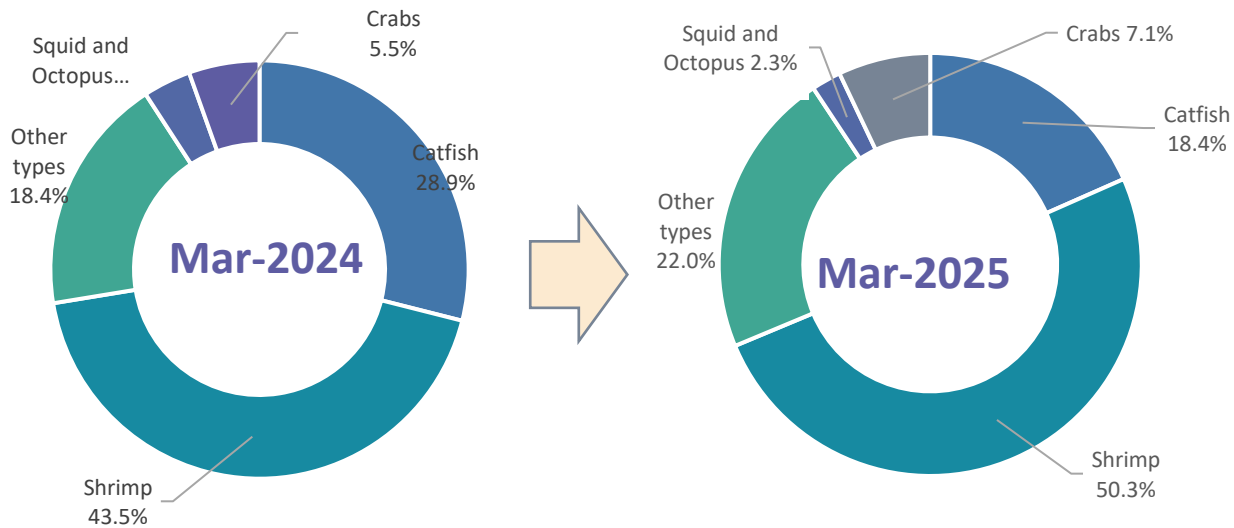


Source: Calculated from data of the Department of Customs

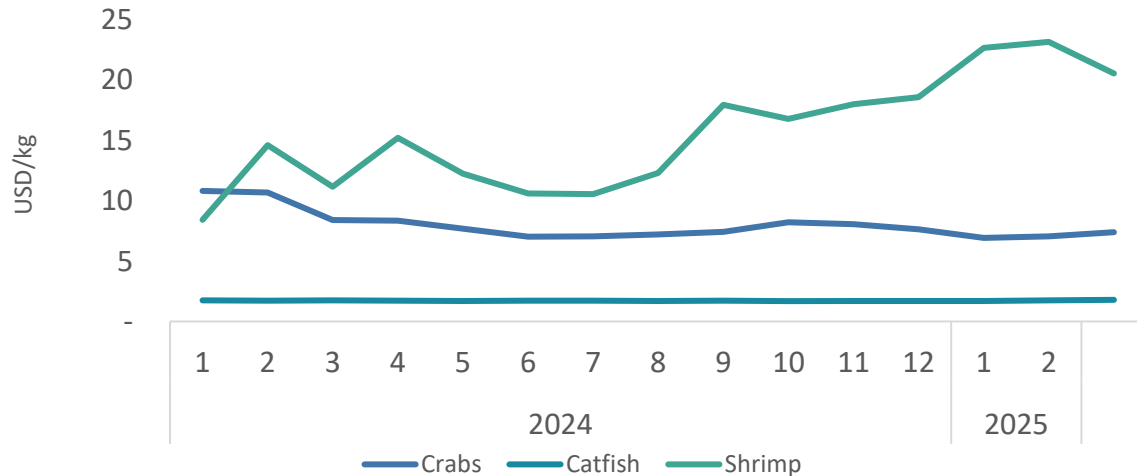


FISHERIES

Structure of exports by products to China, Mar-2025



Average export seafood price to China, Mar-2025



Seafood exports to China, Mar-2025



Catfish

Value: **28.5** Triệu USD

Increases **76.8%** compared to Feb-2025

Increases **5.2%** compared to Mar-2024



Shrimp

Value: **78.0** Triệu USD

Increases **6.9%** so với T2/2025

Increases **91.7%** compared to Mar-2024



Crabs

Value: **10.9** Triệu USD

Increases **21.1%** compared to Feb-2025

Increases **113.9%** compared to Mar-2024

Crabs

The average export price in Mar-2025 is **7.4 USD/kg**; **increases 4.9%** compared to the previous month; and **decreases 12.0%** compared to the same month of 2024 .

Catfish

The average export price in Mar-2025 is **1.8 USD/kg**; **increases 1.7%** compared to the previous month; and **increases 3.1%** compared to the same month of 2024 .

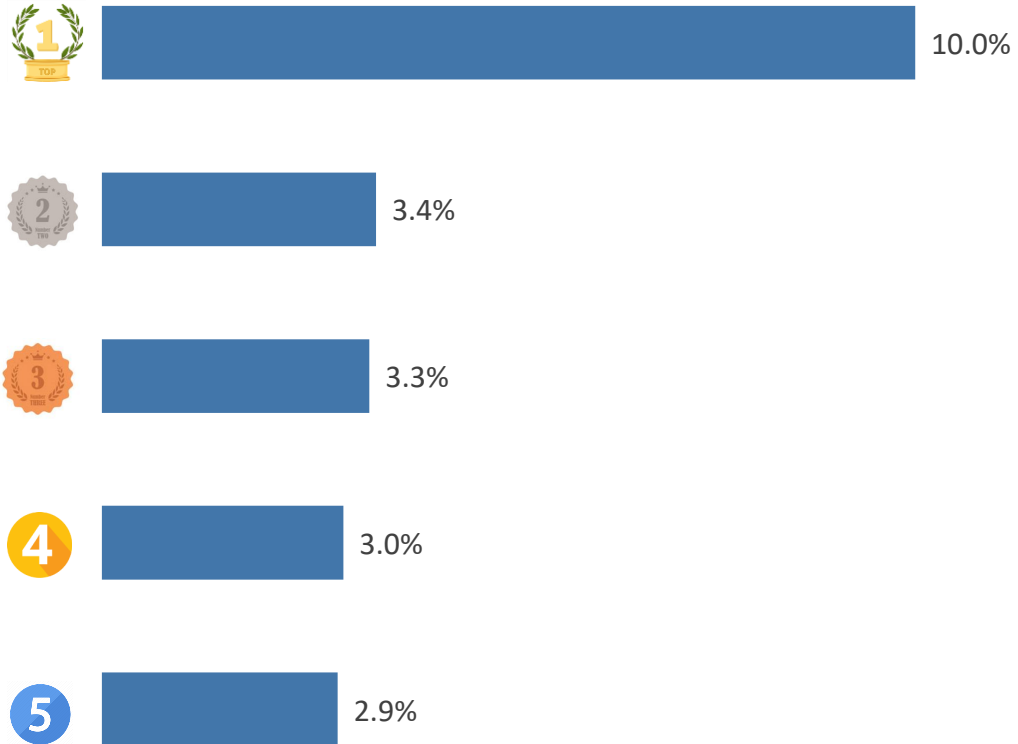
Shrimp

The average export price in Mar-2025 is **20.5 USD/kg**; **decreases 11.4%** compared to the previous month; and **increases 84.1%** compared to the same month of 2024 . (high average price due to large proportion of lobster)

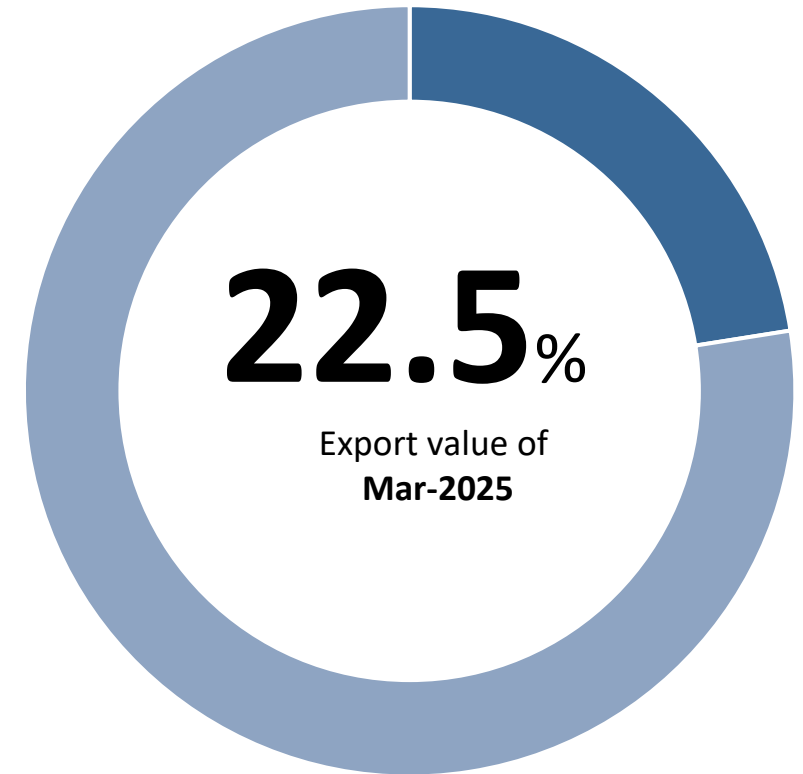


FISHERIES

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



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



U.S. Imposed Import Tariff on Chinese Tilapia to 170%, Domestic Prices Drop

The United States has increased the import tariff on frozen tilapia from China to 170%, combining an individual tariff and a base tariff of 20%. This has strong impacts on China's tilapia sector, which has already been under pressure due to market fluctuations and domestic environmental regulations.

Frozen tilapia is one of China's key seafood exports to the U.S., with around 127,700 tons with value of USD 425 million exported in 2024. The new tariff rate has caused tilapia prices to drop sharply in China during April, falling below production costs — with prices for 500–800g fish down to 8 RMB/kg (USD 1.10/kg) and 300–500g fish down to 6 RMB/kg (USD 0.85/kg).

The high tariffs have led many processing plants in Hainan and Guangdong to stop purchasing raw material purchases, while some exporters have started to shift their supply sources. The China Aquatic Products Processing and Marketing Alliance (CAPPMA) has called for processors to maintain reasonable prices and protect the tilapia supply chain.

In this context, CAPPMA has proposed to increase domestic consumption of tilapia, expanding export markets, and supporting fish farmers to help them overcome the difficult situation.

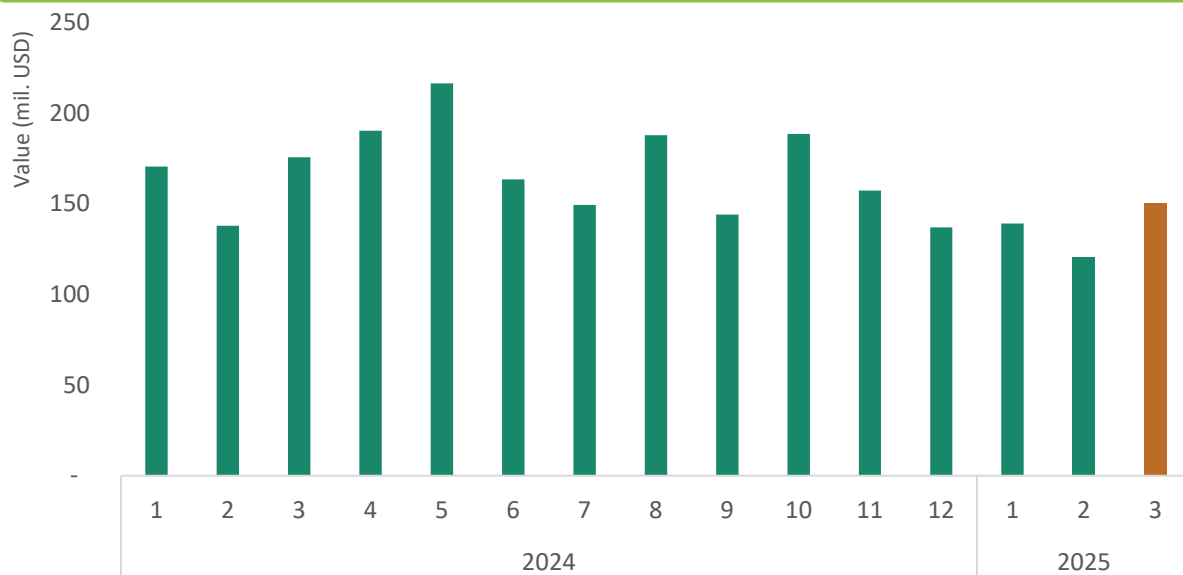
Source: Vasep (Apr-2025)





WOOD & WOODEN PRODUCTS

Export volume and value to **China, Mar-2025**



Export results to **China, Mar-2025**



150

mil. USD

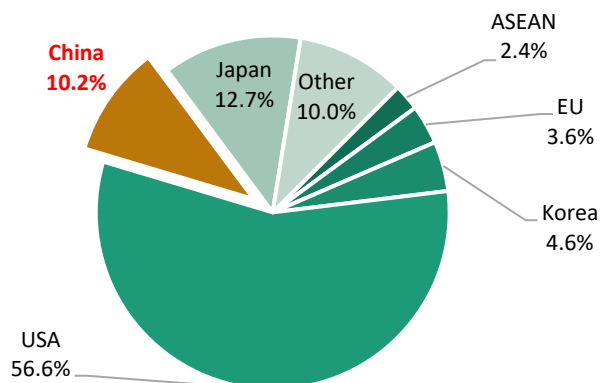
Increases **25.0%** compared to Feb-2025

Decreases **14.3%** compared to Mar-2024

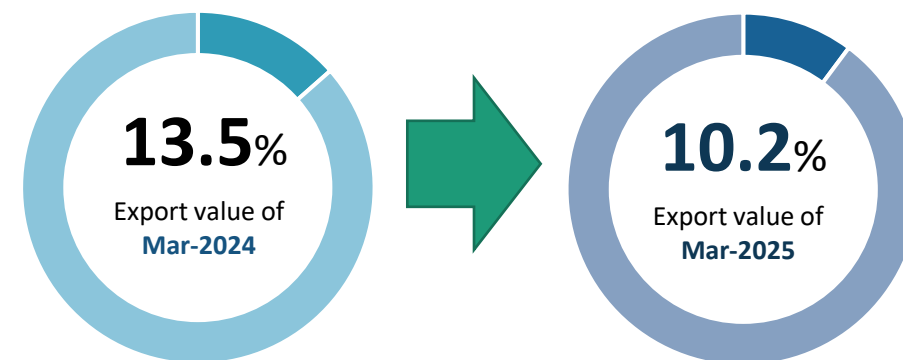
↓ **17.7 mil. USD** less than the monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **409.8 mil. USD. 20.3%** of total 2024

Percentage of export value to **China, Mar-2025**



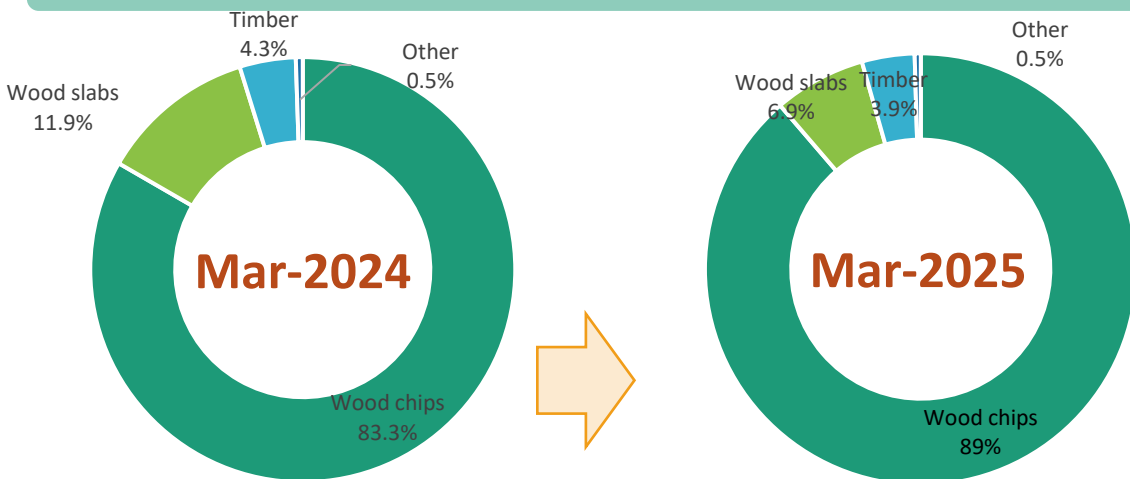
Changes in percentage of export value to **China, Mar-2025**



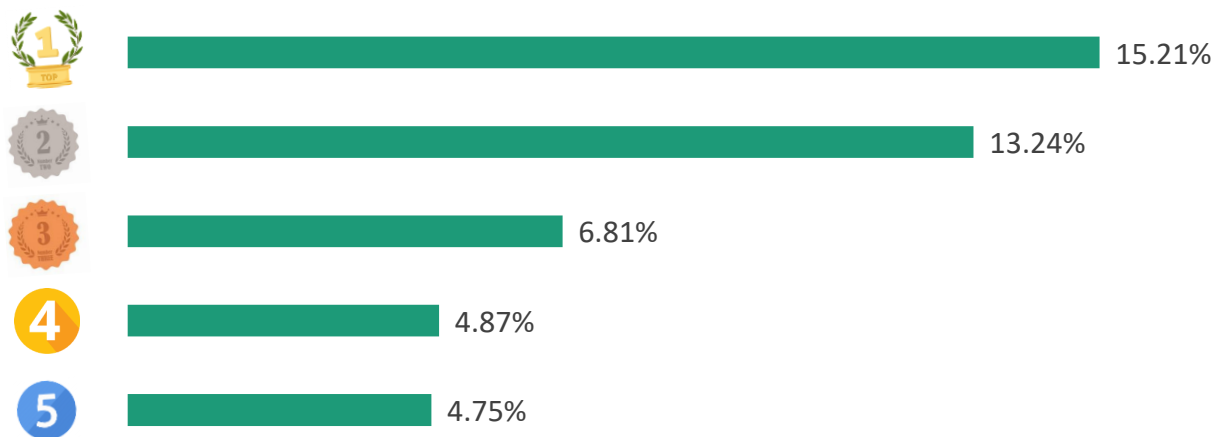


WOOD & WOODEN PRODUCTS

Structure of exports by products to China, Mar-2025



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



Export results to China, Mar-2025



Wood chips

Value: **128.8** mil. USD

Increases **17%** compared to Feb-2025

Decreases **11%** compared to Mar-2024



Wood slabs

Value: **10.0** mil. USD

Increases **78%** compared to Feb-2025

Increases **25%** compared to Mar-2024



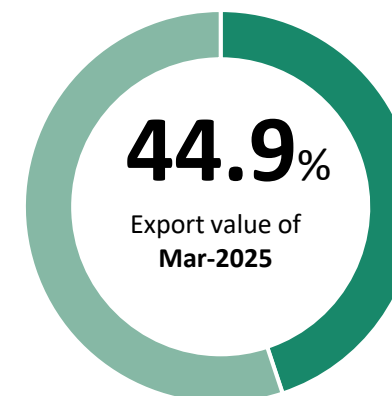
Timber

Value: **5.7** mil. USD

Increases **70%** compared to Feb-2025

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

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





SPOTLIGHTS



China's furniture industry is facing serious impacts from the new U.S. tariffs. With tariff of 170%, Chinese furniture products are able to lose the U.S. market entirely.

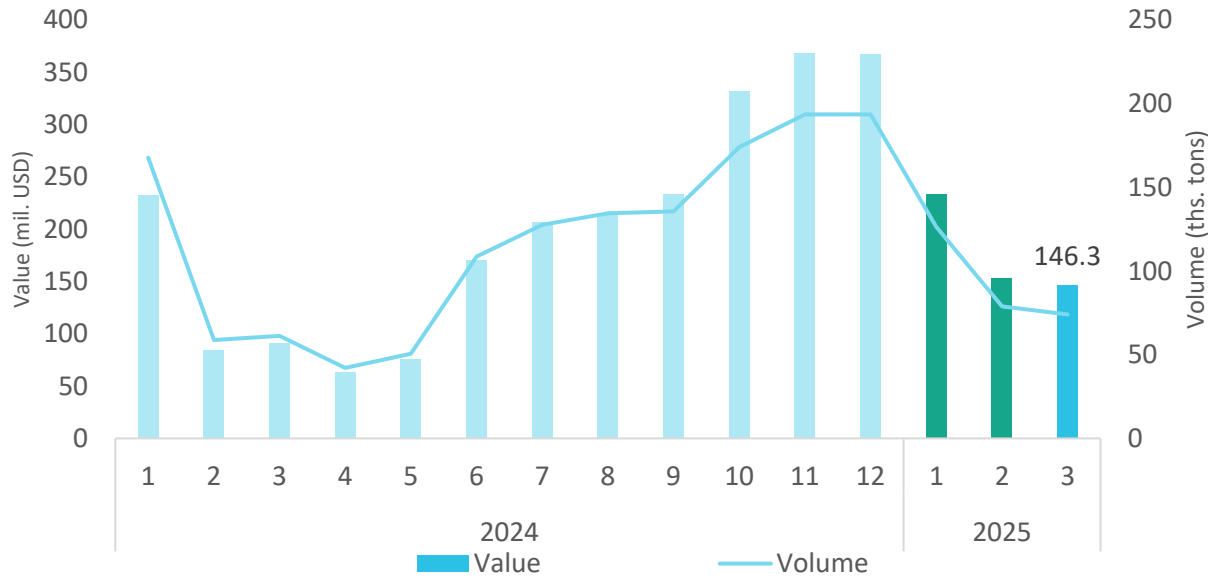
In 2024, the total export value of furniture, bedding, and lighting products from China to the United States was approximately 224.7 billion RMB (30.9 billion USD). However, the high tariffs have reduced the competitiveness of Chinese products, causing difficulties for more than 20% of small and medium-sized exporters.

The three main problems faced by businesses include: decreasing competitiveness, large inventories affecting capital flow, and the risk of capital chain disruption due to long production cycles. The impact of these tariffs not only affects exporting companies but effects to suppliers of raw materials, logistics services, and design firms.

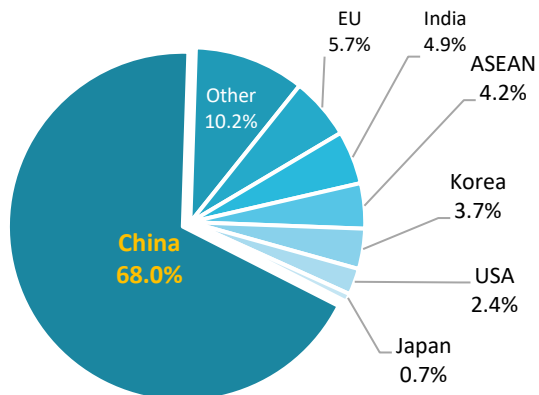


RUBBER

Export volume and value to China, Mar-2025



Percentage of export value to China, Mar-2025



Export results to China, Mar-2025

VALUE

146.3 mil. USD

Decreases **4.5%** compared to Feb-2025

Increases **61.3%** compared to Mar-2024

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

Accumulated 3 months of 2025 reaches **533** mil. USD. **22%** of total 2024

VOLUME

74.1 ths. tons

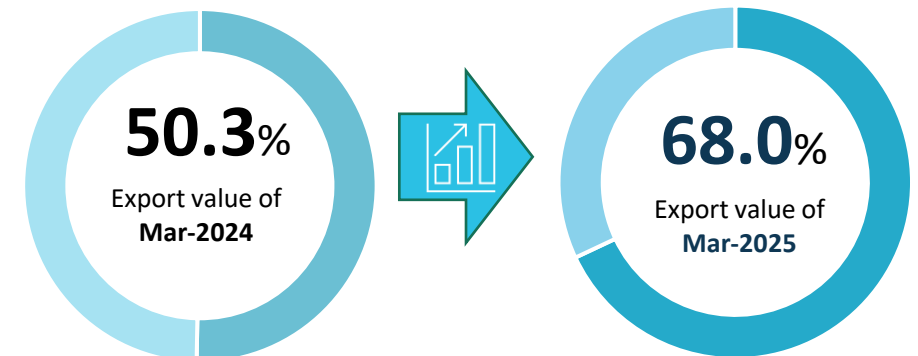
Decreases **6.0%** compared to Feb-2025

Increases **20.8%** compared to Mar-2024

47 ths. tons less than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **279** ths. tons. **19%** of total 2024

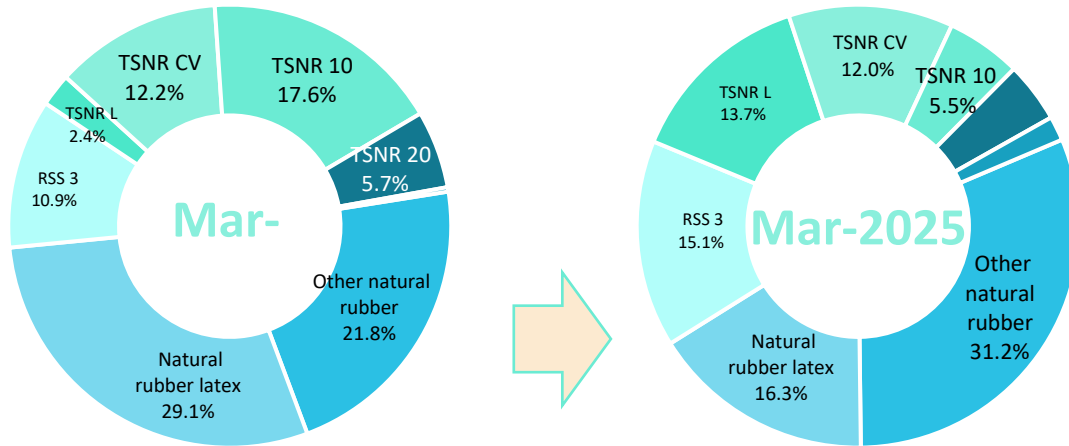
Changes in percentage of export value to China, Mar-2025



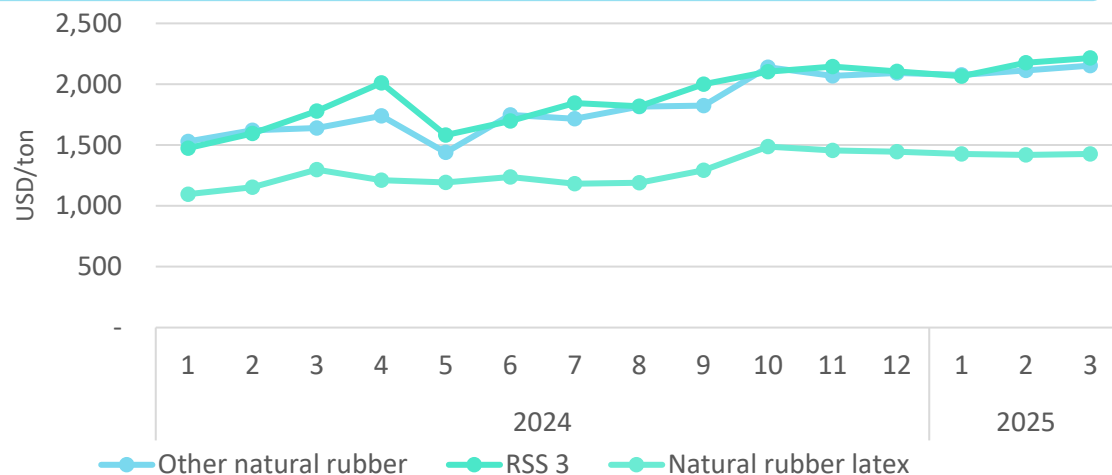


RUBBER

Structure of exports by products to China, Mar-2025



Average export price to China, Mar-2025



Export results to China, Mar-2025



Natural rubber latex

Value: **23.86** mil. USD

Decreases **42%** compared to Feb-2025

Decreases **9.8%** compared to Mar-2024



RSS 3

Value: **22.14** mil. USD

Increases **21%** compared to Feb-2025

Increases **124%** compared to Mar-2024



Other natural rubber

Value: **45.7** mil. USD

Increases **3.7%** compared to Feb-2025

Increases **131%** compared to Mar-2024

Natural rubber latex

The average export price in Mar-2025 is **1,428** USD/ton; **increases 0.6%** compared to the previous month; and **increases 10.5%** compared to the same month of 2024 .

RSS 3

The average export price in Mar-2025 is **2,215** USD/ton; **increases 1.8%** compared to the previous month; and **increases 35.1%** compared to the same month of 2024 .

Other natural rubber

The average export price in Mar-2025 is **2,153** USD/ton **increases 1.8%** compared to the previous month; and **increases 31%** compared to the same month of 2024 .

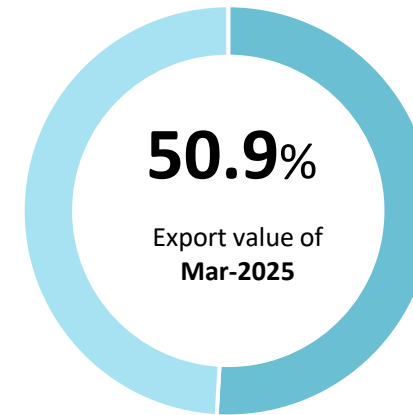


RUBBER

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



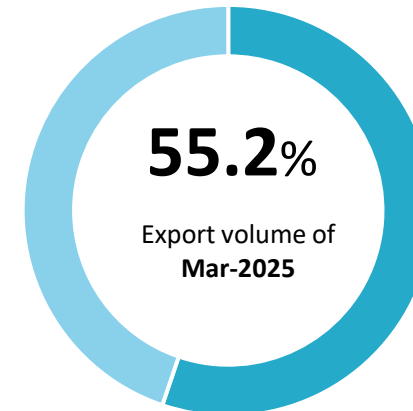
Value ratio of TOP 5 export enterprises to China, Mar-2025



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



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





RUBBER

SPOTLIGHTS

❖ **China Significantly Increases Rubber Imports Amid Trade Tensions with the U.S.**

China imported 760,000 tons of natural and synthetic rubber (including latex) in March 2025, marking a 16.7% increase compared to 651,000 tons in the same period of 2024. In the first quarter of 2025, total rubber imports reached 2.183 million tons, up 20.9% from 1.806 million tons during the same period last year.

However, China is facing negative impacts from the escalating tariff tension with the United States, particularly in the rubber sector. The ongoing tariff hikes between the two countries have led to a decline in China's rubber exports to the U.S., putting downward pressure on rubber prices, especially for natural rubber (RU). Despite the sharp increase in imports, domestic consumption demand is under strain due to export limitations, causing continued short-term pressure on rubber prices.





RUBBER

SPOTLIGHTS

❖ China implements five key measures to promote the development of natural rubber sector

China is implementing five major measures to promote the natural rubber sector, including policy support, technological innovation, workforce development, international cooperation, and promoting cultural value.

Specifically:

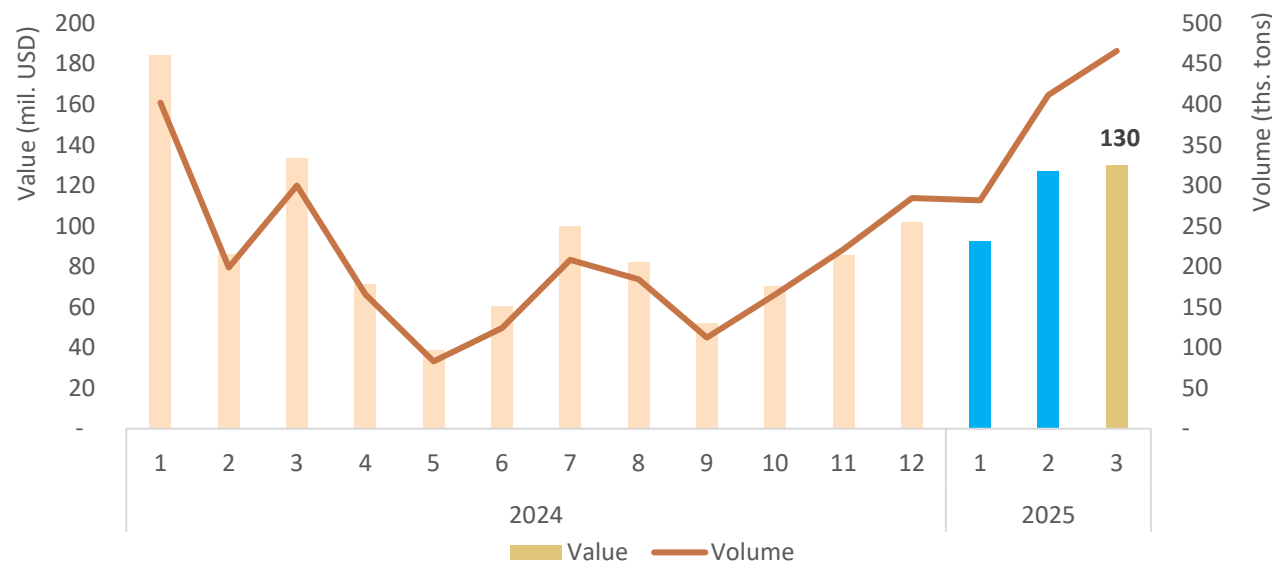
- Policy Support: Supporting the renovation of old rubber plantations, improving the support system, productivity and quality of natural rubber.
- Technological Innovation: Strengthening the scientific research system, led by the Tropical Agricultural Science Institute of China, along with local institutes and businesses.
- Workforce Development: organizing technical training, skill competitions, and build a core workforce of rubber workers; attracting and training high-quality labor.
- International Cooperation: Participating in "Belt and Road" initiative, investing in natural rubber chain abroad, especially in Thailand, Indonesia, Malaysia, and expanding to Ivory Coast, Cameroon, etc.
- Cultural-Historical Value: Developing eco-tourism areas combining rubber, culture, agriculture, and research, contributing to sustainable development.





CASSAVA & CASSAVA PRODUCTS

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



Export results to China, Mar-2025

VALUE
129.9 mil. USD

Increases **2.2%** compared to Feb-2025

Decreases **2.8%** compared to Mar-2024

Increases **41 mil. USD** more than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **349.7 mil. USD, 33% of total 2024**

VOLUME
465.7 ths. tons

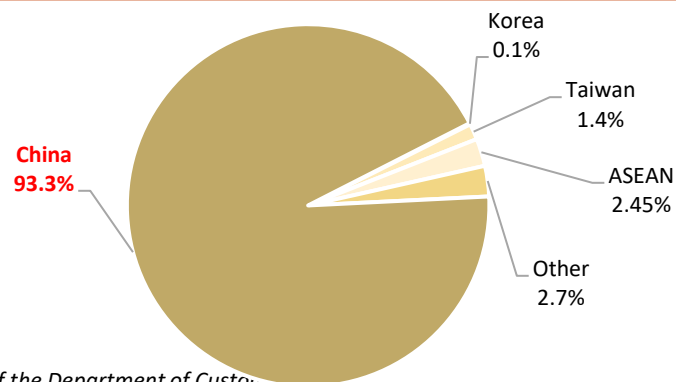
Increases **13.2%** compared to Feb-2025

Increases **55.4%** compared to Mar-2024

Increases **262 ths. tons** more than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **1.16 mil. tons, 47.3% of total 2024**

Percentage of export value to China, Mar-2025



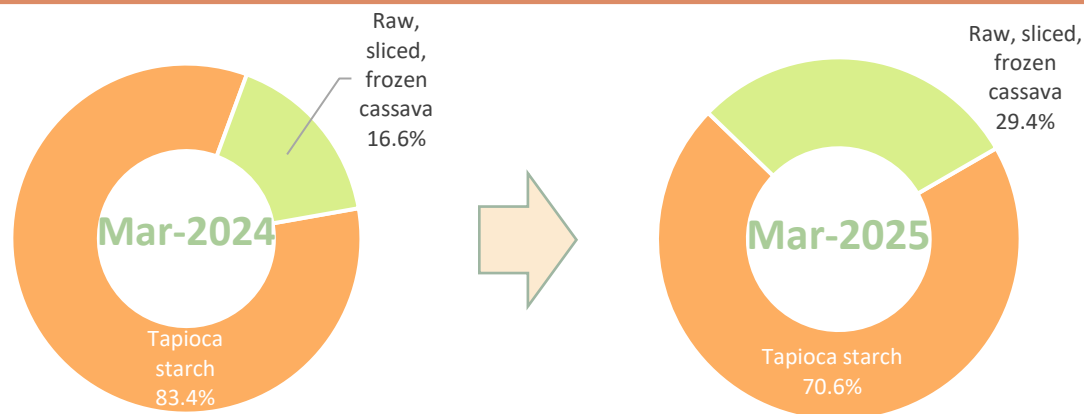
Changes in percentage of export value to China, Mar-2025





CASSAVA & CASSAVA PRODUCTS

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



Export results to China, Mar-2025



Raw. sliced. frozen cassava

Value: **38.23** mil. USD

Increases **63.2%** compared to Feb-2025

Increases **72.4%** compared to Mar-2024



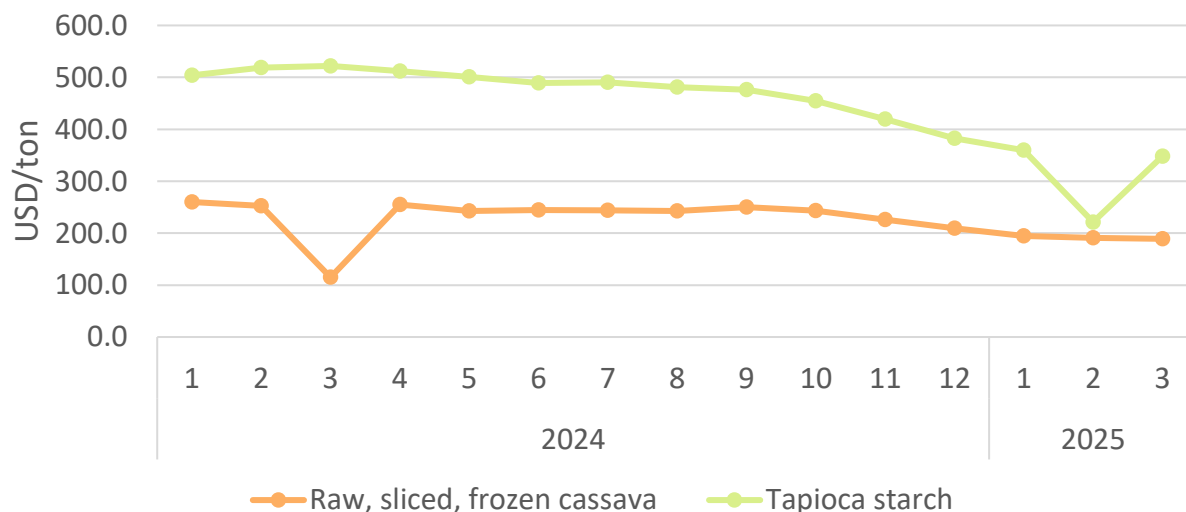
Tapioca starch

Value: **91.63** mil. USD

Decreases **11.6%** compared to Feb-2025

Decreases **17.7%** compared to Mar-2024

Percentage of export value to China, Mar-2025



Tapioca starch

The average export price in Mar-2025 is **348** USD/ton; **increases 57.2%** compared to the previous month; and **decreases 33.3%** compared to the same month of 2024.

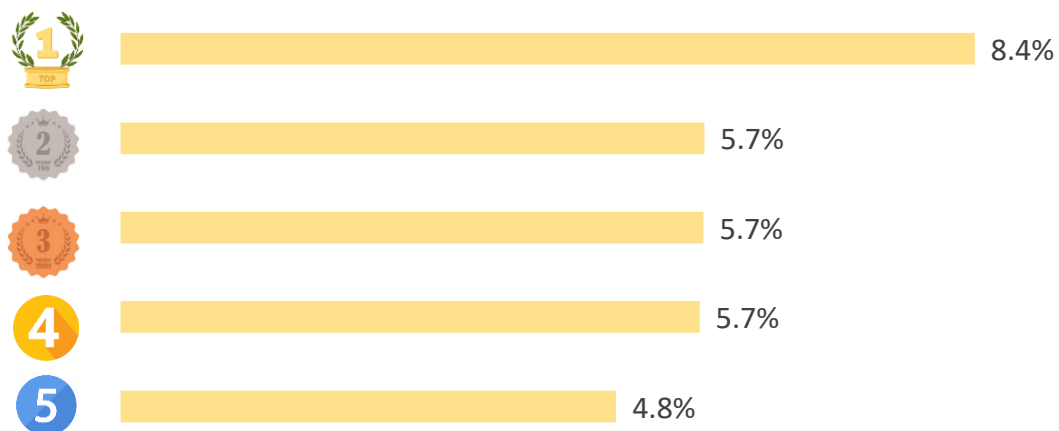
Raw. sliced. frozen cassava

The average export price in Mar-2025 is **189** USD/ton; **decreases 0.9%** compared to the previous month; and **increases 64.5%** compared to the same month of 2024.

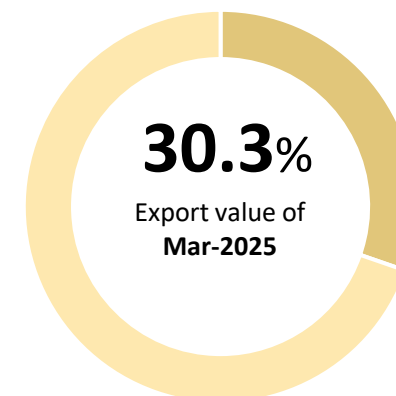


CASSAVA & CASSAVA PRODUCTS

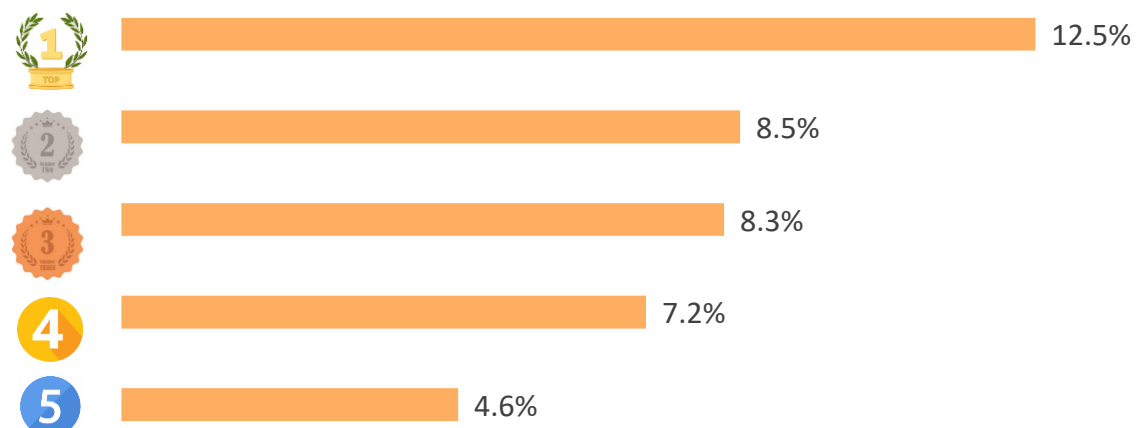
TOP 5 export enterprises by value to Volume ratio of TOP 5 export enterprises to **China, Mar-2025**



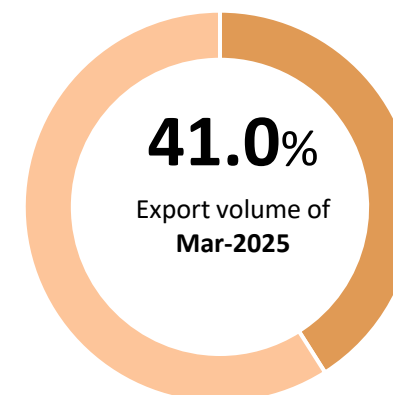
Value ratio of TOP 5 export enterprises to **China, Mar-2025**



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



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





China Significantly Increases Tapioca Starch Imports in Q1/2025

In March 2025, China imported 587,100 tons of tapioca starch, equivalent to USD 217.21 million. Compared to the same period in 2024, the import volume increased by 40.01%, while the value decreased by 4.26%. For the first three months of 2025, total tapioca starch imports reached 1.45 million tons, valued at USD 546.41 million, up 44.17% in volume and 1.91% in value year-on-year. The main suppliers were Vietnam (accounting for 48.17%), Thailand (35.60%), Laos (14.15%), and Cambodia (2.09%).

In March 2025, China also imported 732,800 tons of dried cassava, more than doubling the volume compared to the previous month (up 103.5%) and the same period last year (up 103.4%). The import value reached USD 142.42 million, up 105.02% month-on-month and 52.68% year-on-year. In Q1/2025, China imported 1.22 million tons of dried cassava worth USD 237.79 million, increasing by 66.96% in volume and 23.39% in value compared to the same period last year.





The special ASEAN 2025 tapioca starch train from Hanoi to Zhengzhou (China) arrived

On April 15, 2025, a shipment of tapioca starch from Vietnam by Wanbang Youxuan Supply Chain Management Co., Ltd. (a subsidiary of Wanbang Group), was successfully transported to Zhengzhou (China) via the overland “Silk Road” railway route. This marks an important milestone in response to China’s “Belt and Road” initiative, contributing to the development of a unified national market and supporting Zhengzhou’s emergence as a global connectivity hub.

For many years, Wanbang Group has actively implemented this initiative, particularly by strengthening agricultural trade cooperation with ASEAN countries. This special train carried 20 containers of tapioca starch from Vietnam to Zhengzhou, and import volume is expected to continue increasing in the near future.

Source: wap.zzwb.cn



Huaihua City, Hunan Province, is the distribution hub for tapioca starch in the Central China market

Since early 2025, large volumes of tapioca starch from ASEAN countries such as Laos and Thailand have been imported into Huaihua International Inland Port via both rail and waterway routes. In 2023, Huaihua imported 16,700 tons of tapioca starch (1,260 containers); in 2024, the volume increased to 70,000 tons (+317%). In just the first two months of 2025, 920 containers were imported, up 12.75% compared to the same period last year. Most of the products are distributed to central Chinese provinces such as Hunan, Hubei, Guizhou, and Jiangxi.

Huaihua has become a major distribution center for tapioca starch thanks to its strategic location along China’s Western Land-Sea Corridor, which efficiently connects to ASEAN countries via the China–Laos and China–Vietnam railway lines. Key enterprises such as Savalli, Mengmeng, and Yousu aim to import 150,000 tons of tapioca starch in 2025, driving Huaihua’s transformation from a transportation hub into a cassava processing industrial center.

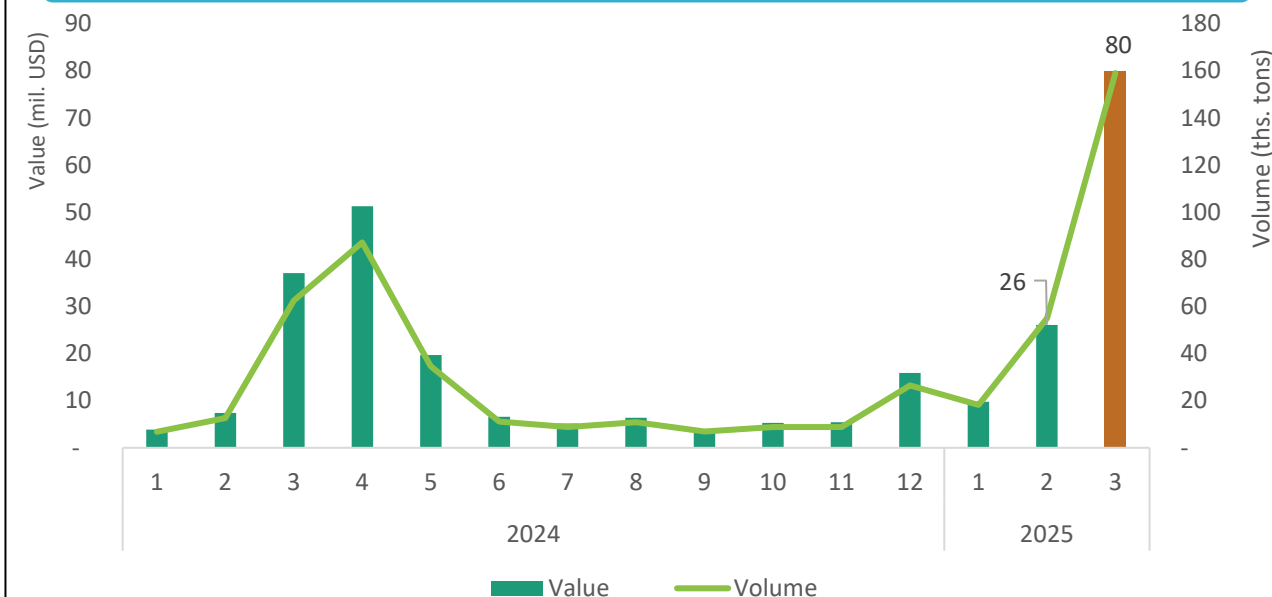
Source: Ditp.go.th





RICE

Export volume and value to China, Mar-2025



Export results to China, Mar-2025

VALUE
79.8 mil. USD \$

Increases **3 times** compared to Feb-2025

Increases **2.2 times** compared to Mar-2024

↑ **65.8 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **115.7 mil. USD. 68.9%** of total 2024

VOLUME
159.0 ths. tons

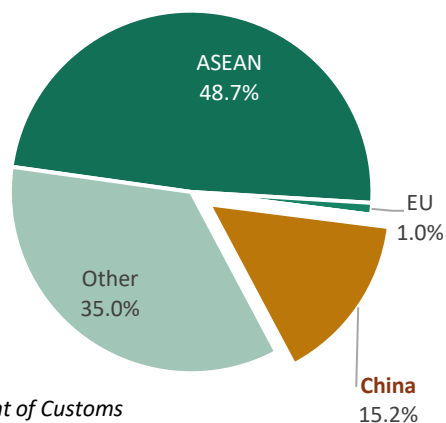
Increases **2.9 times** compared to Feb-2025

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

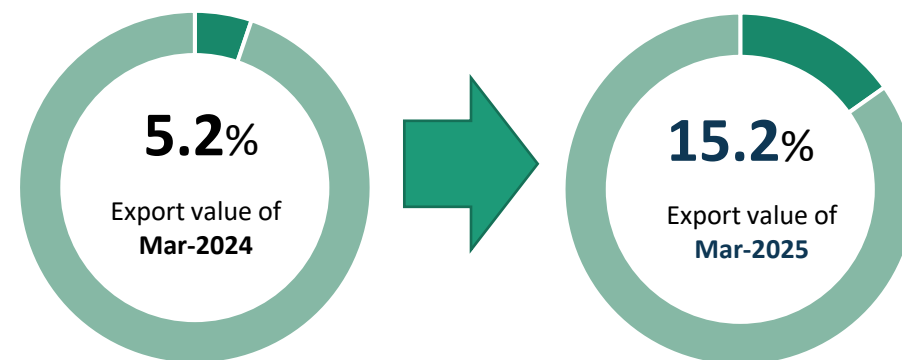
↑ **135.2 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 3 months of 2025 reaches **232.1 ths. tons. 81.3%** of total 2024

Percentage of export value to China, Mar-2025



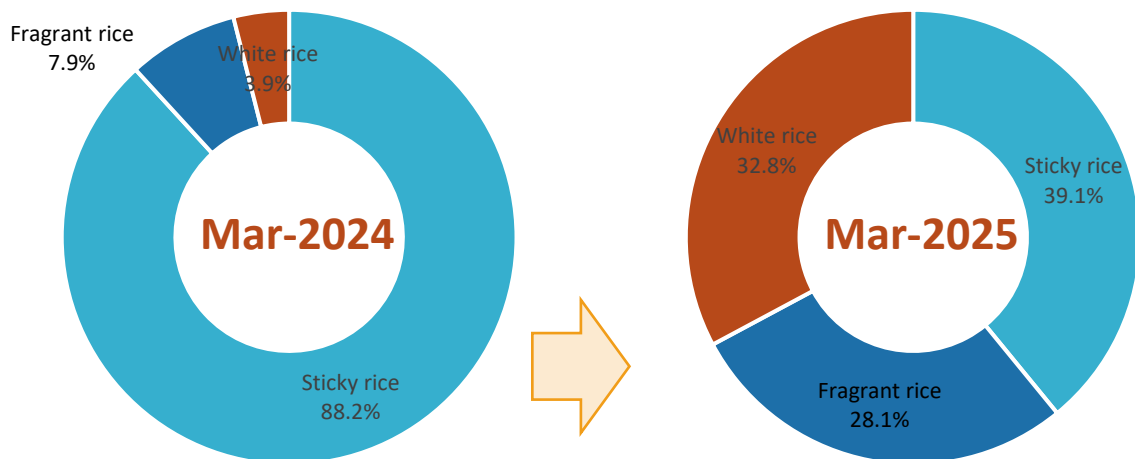
Changes in percentage of export value to China, Mar-2025



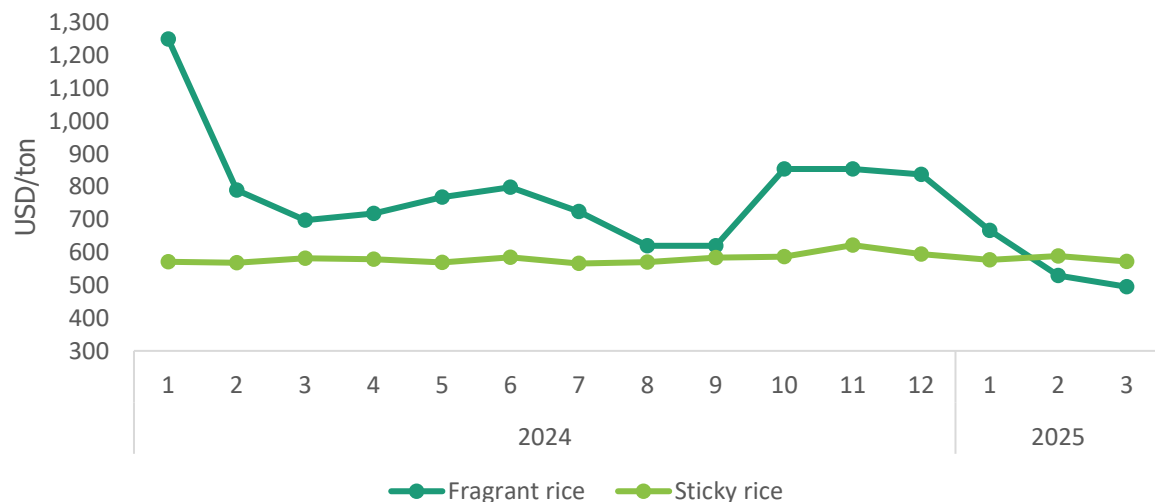


RICE

Structure of exports by products to China, Mar-2025



Average export rice price to China, Mar-2025



Export results to China, Mar-2025



Sticky rice

Value: **31.1** mil. USD

Increases **5.8 times** compared to Feb-2025

Decreases **5%** compared to Mar-2024



Fragrant rice

Value: **22.4** mil. USD

Increases **2.3 times** compared to Feb-2025

Increases **7.7 times** compared to Mar-2024



White rice

Value: **26.1** mil. USD

Increases **2.4 times** compared to Feb-2025

Increases **17.9 times** compared to Mar-2024

Sticky rice

The average export price in Mar-2025 is **572 USD/ton**; **decreases 3%** compared to the previous month; and **decreases 2%** compared to the same month of 2024.

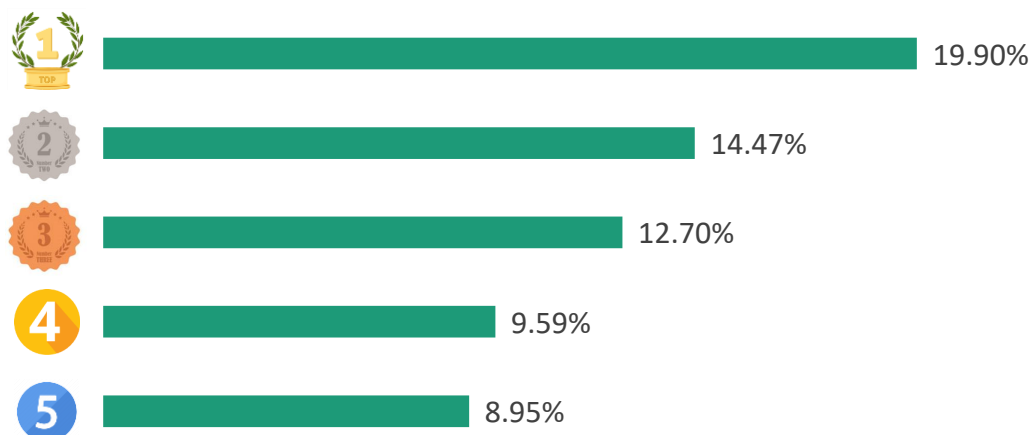
Fragrant rice

The average export price in Mar-2025 is **495 USD/ton**; **decreases 6%** compared to the previous month; and **decreases 29%** compared to the same month of 2024.

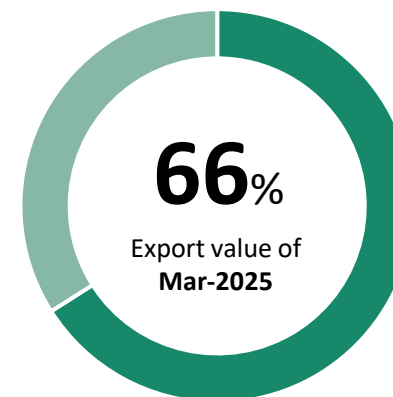


RICE

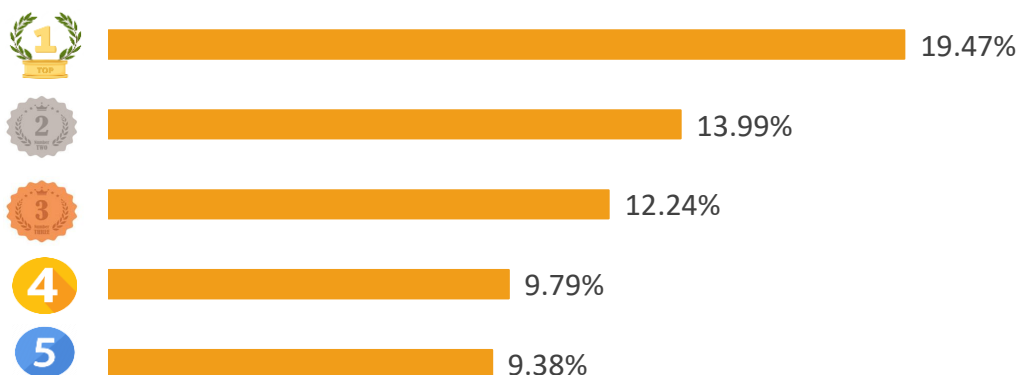
TOP 5 export enterprises by value to China, Mar-2025



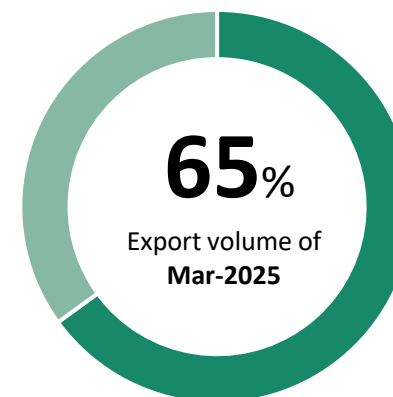
Value ratio of TOP 5 export enterprises to China, Mar-2025



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



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





RICE



SPOTLIGHTS

China has just announced a 10-year plan to become an agricultural powerful producer by 2035, aiming to stabilize grain output and ensure a safer food supply.

The plan outlines key strategies such as enhancing food security, modernizing agriculture, promoting technological innovation, and advancing rural development. Specifically, by 2027, China aims to achieve a grain output of around 700 million tons, improve self-sufficiency in key crops, make breakthroughs in seed development and agricultural mechanization, thereby enhancing global competitiveness.

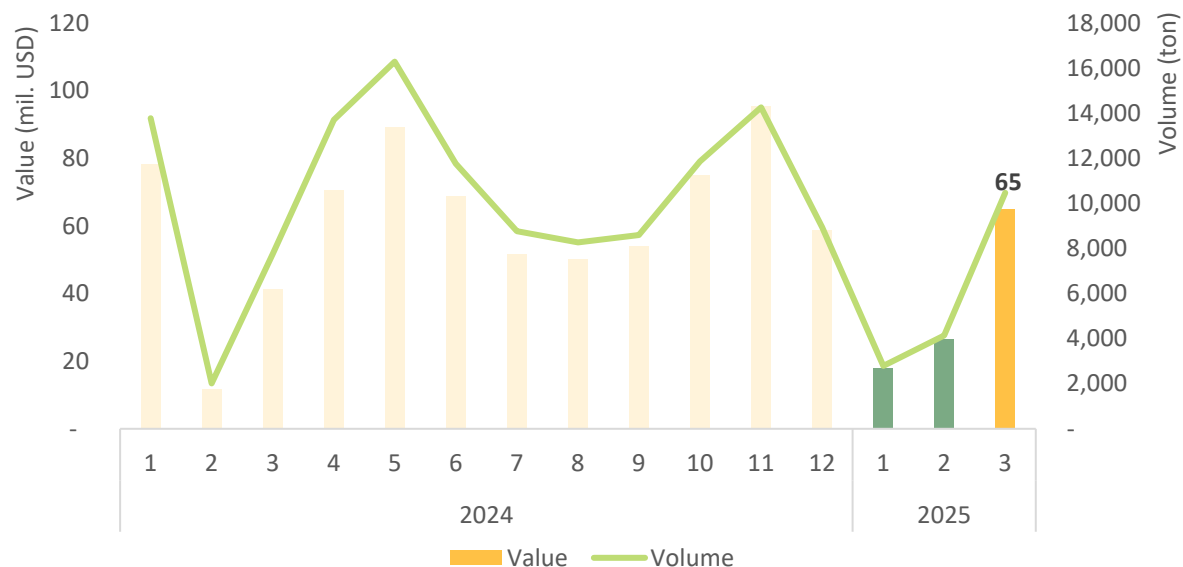
The specific goals include stabilizing rice and wheat production, developing root crops and grains suited to local conditions, and tapping into the potential of oil-producing crops such as rapeseed and peanuts, while also expanding oil sources from camellia trees and animal fats.

The plan also includes measures to improve agricultural production and develop agricultural industrial zones to ensure national food security.



CASHEW NUTS

Export value and volume to China, Mar-2025



Export results to China, Mar-2025

VALUE
64.9 mil. USD

Increases **144%** compared to Feb-2025

Increases **56.8%** compared to Mar-2024

Increases **2.8 mil. USD** more than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **109 mil. USD, 15%** of total 2024

VOLUME
10.5 ths. tons

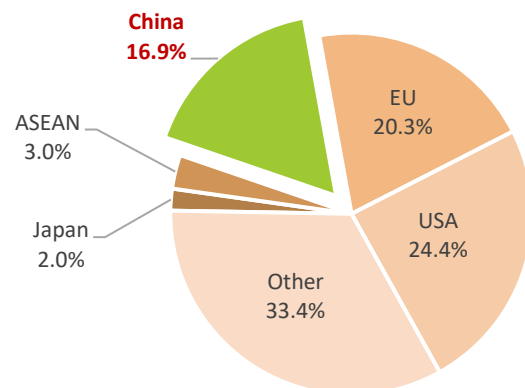
Increases **153%** compared to Feb-2025

Increases **35%** compared to Mar-2024

Decreases **28 tons** less than the monthly average rate in 2024

Accumulated 3 months of 2025 reaches **17.4 ths. tons, 14%** of total 2024

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



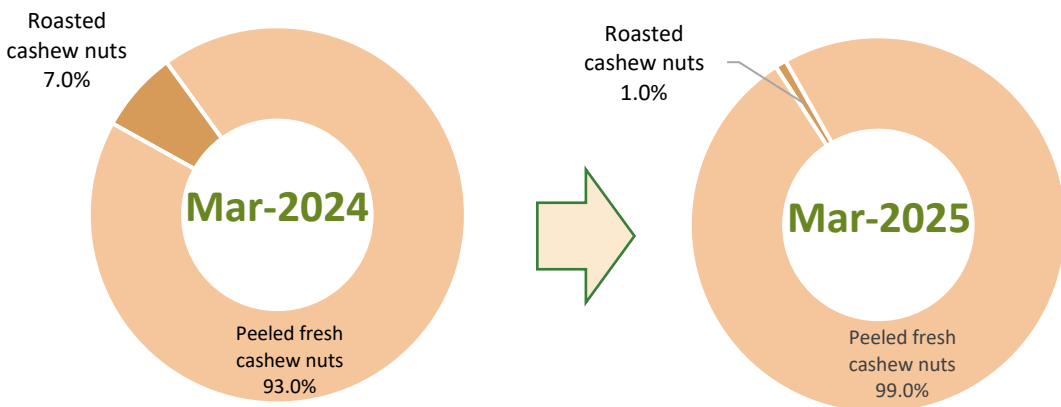
Changes in percentage of export value to China, Nov-2023



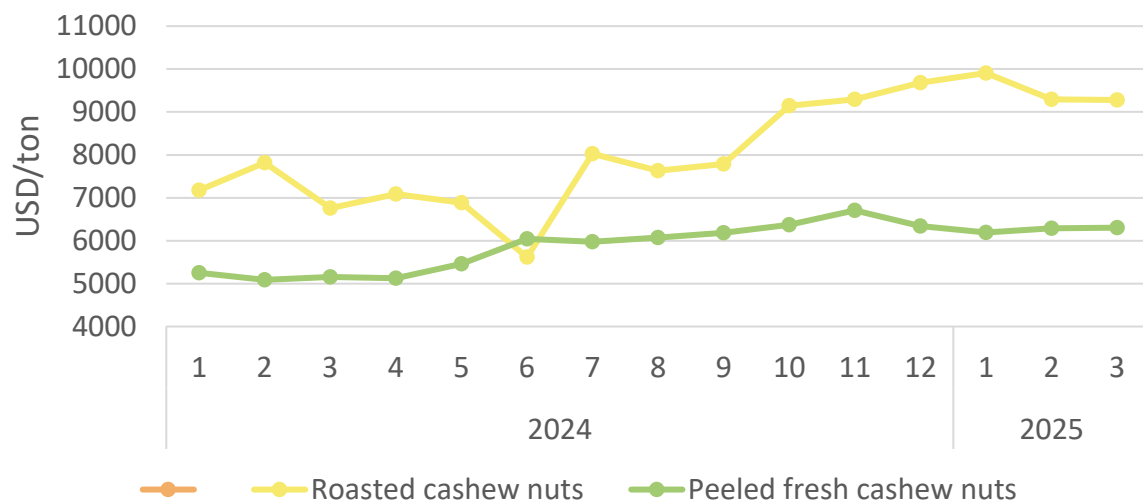


CASHEW NUTS

Structure of exports by products to China, Mar-2025



Average export cashew nuts price to China, Mar-2025



Export results to China, Mar-2025



Peeled fresh cashew nuts

Value: **64.1** mil. USD

Increases **146%** compared to Feb-2025

Increases **67%** compared to Mar-2024



Roasted cashew nuts

Value: **0.8** mil. USD

Decreases **2.8%** compared to Feb-2025

Decreases **78.1%** compared to Mar-2024

Peeled fresh cashew nuts

The average export price in Mar-2025 is **6,301** USD/ton; **increases 0.1%** compared to the previous month; and **increases 22%** compared to the same month of 2024 .

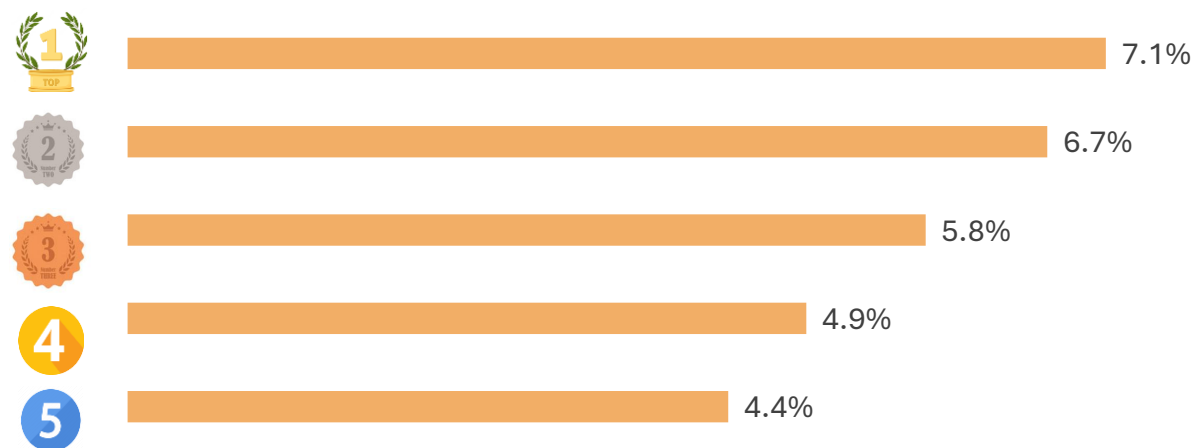
Roasted cashew nuts

The average export price in Mar-2025 is **9,275** USD/ton; **decreases 0.2%** compared to the previous month; and **increases 37%** compared to the same month of 2024 .



CASHEW NUTS

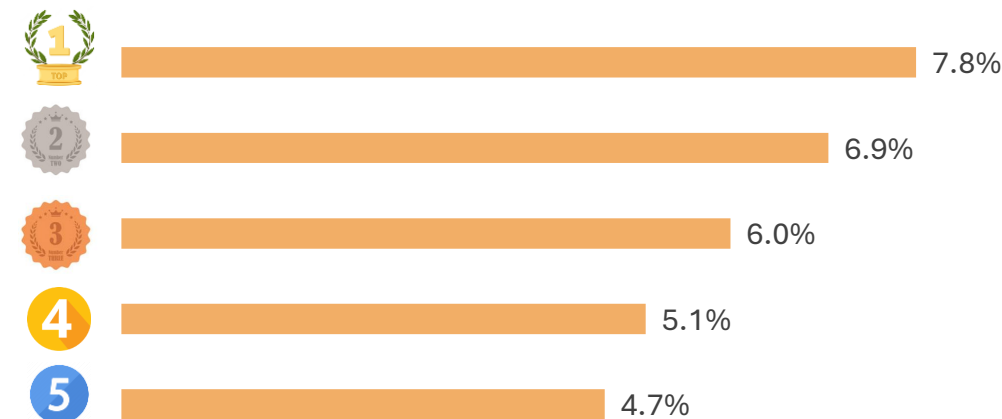
TOP 5 export enterprises by value to China, Mar-2025



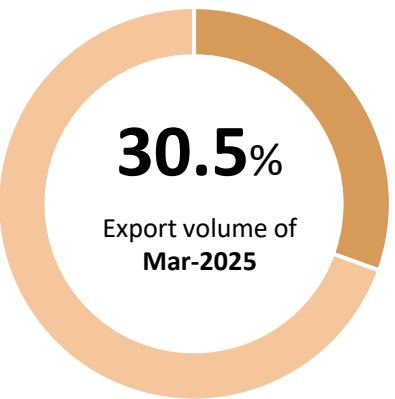
Value ratio of TOP 5 export enterprises to China, Mar-2025



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



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



Source: Calculated from data of the Department of Customs

CASHEW NUTS



SPOTLIGHTS

Sinomach Hainan Development Co., Ltd is studying to set up a cashew warehouse in Kampong Thom Province, Cambodia

On April 9, 2025, Sinomach Hainan Development Co., Ltd. (China) conducted a survey to set up a cashew warehouse and drying yard in Kampong Thom Province, Cambodia to promote agricultural processing and exports, especially cashew nuts. At a meeting chaired by Prime Minister's Advisor Hean Sahib, the company expressed its desire to cooperate with the Cambodian government to implement the project.

The Cambodian government highly appreciated the proposal, affirming that investment in the cashew sector will contribute to rural economic development and improve people's livelihoods.

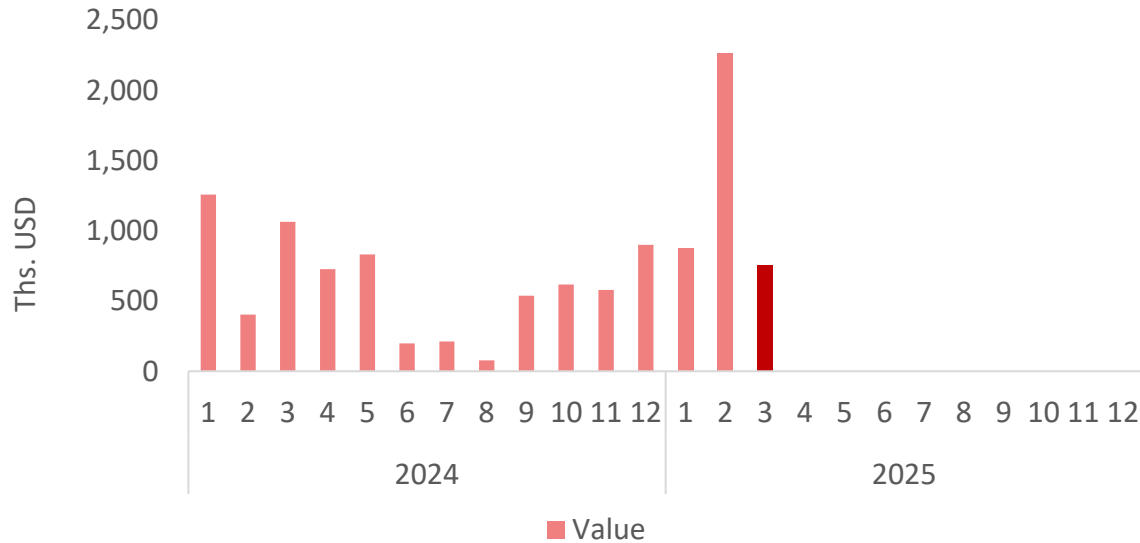
Sinomach Hainan Development Co., Ltd is a Chinese state-owned enterprise with strong capabilities in agriculture and supporting industries. If successful, the project will enhance processing capacity, increase farmers' income, and help Cambodia move up in the global cashew value chain.

Source: construction-property.com

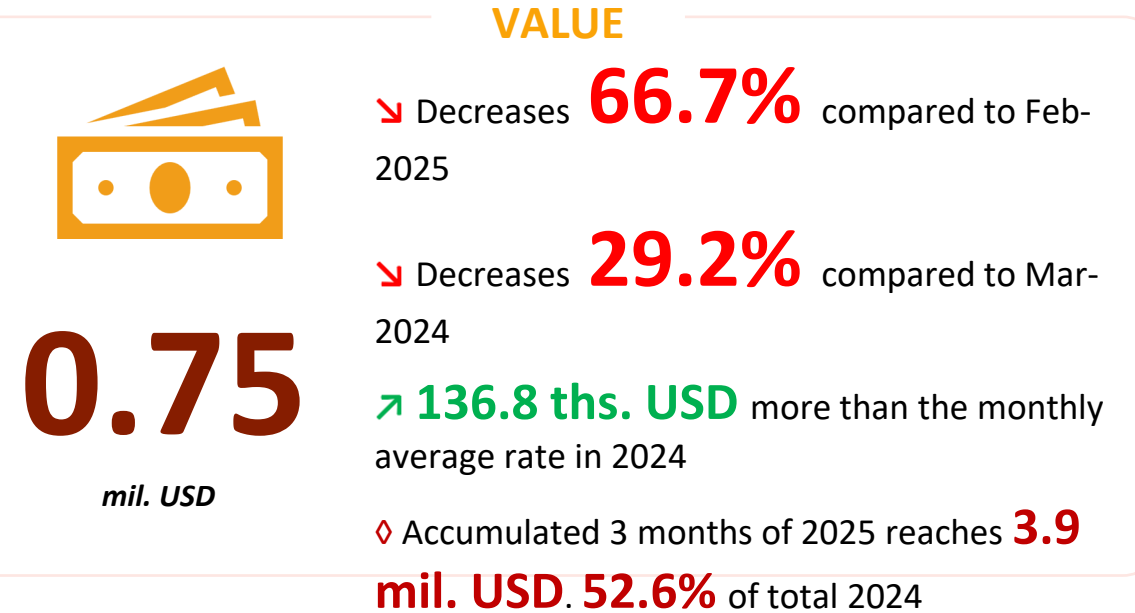


MEAT AND MEAT PRODUCTS (EXPORT)

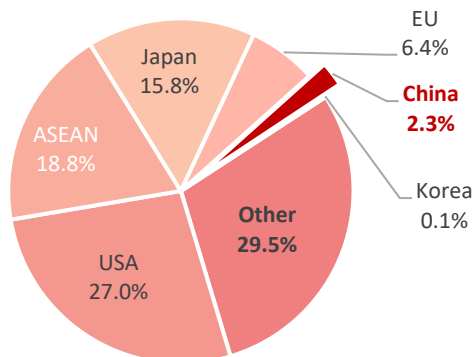
Export value to China, Mar-2025



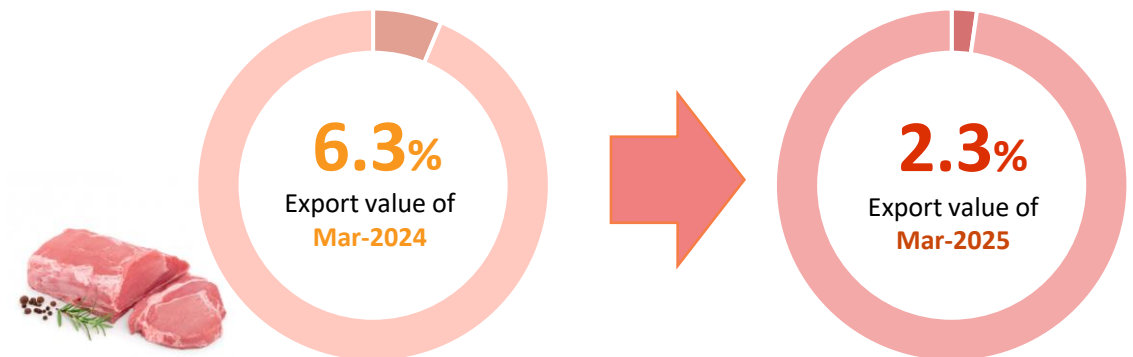
Export results to China, Mar-2025



Percentage of export value to China, Mar-2025



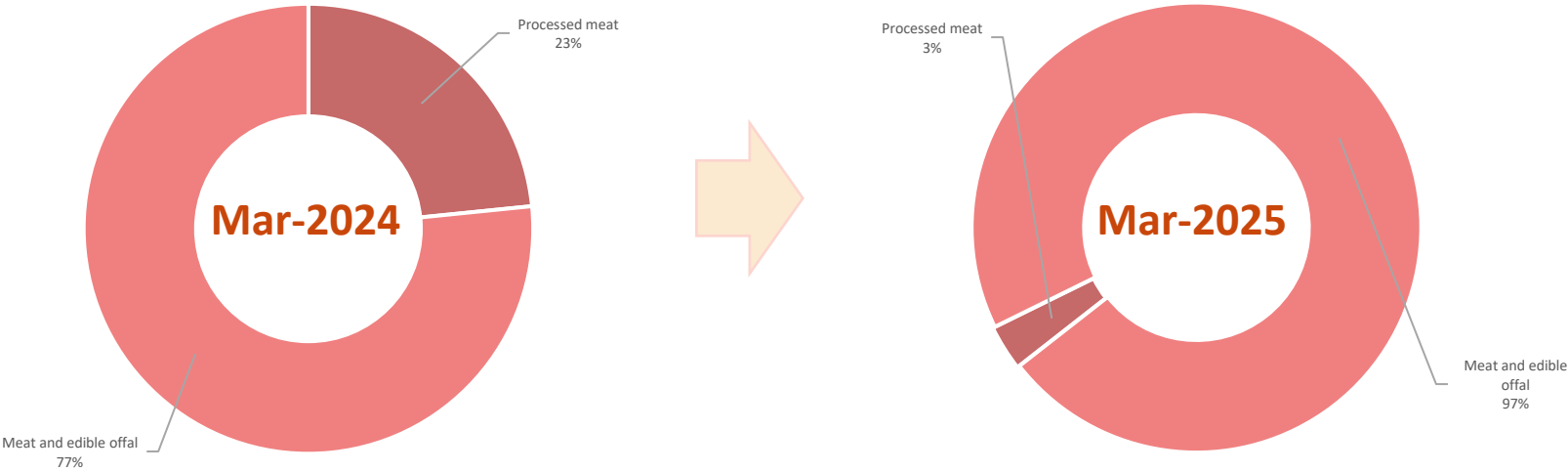
Changes in percentage of export value to China, Mar-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to China, Mar-2025



Export results to China, Mar-2025



Meat and edible offal

Value: **0.729** mil. USD
Decreases **55.2%** compared to Feb-2025
Decreases **10.6%** compared to Mar-2024



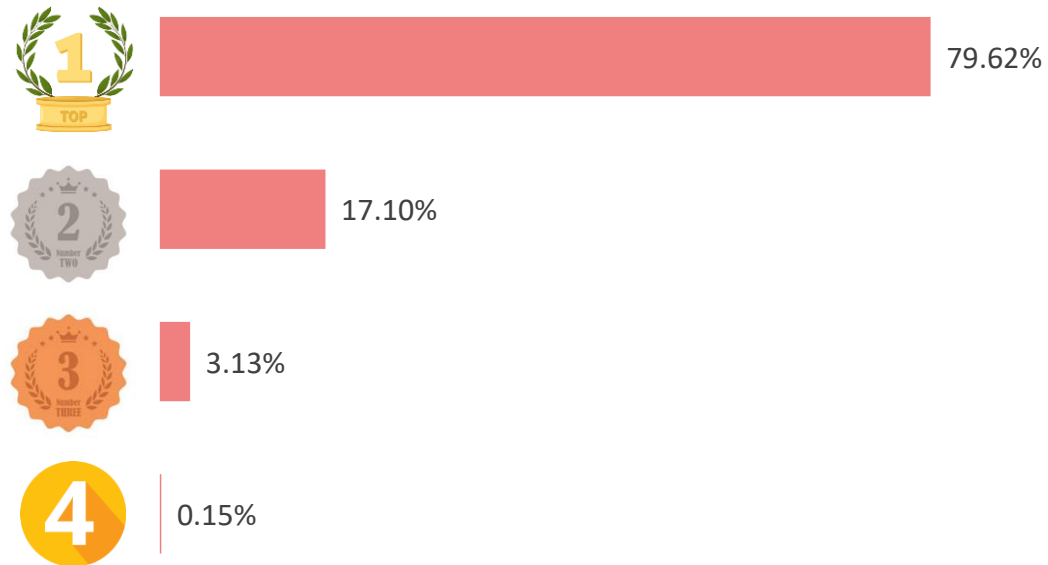
Processed meat

Value: **24.7** ths. USD
Decreases **96.1%** compared to Feb-2025
Decreases **90.1%** compared to Mar-2024



MEAT AND MEAT PRODUCTS (EXPORT)

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



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





MEAT AND MEAT PRODUCTS

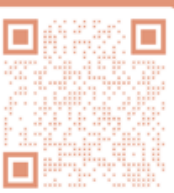
SPOTLIGHTS



According to forecasts by the United States Department of Agriculture (USDA), China's total beef imports in 2025 are about 3.825 million tons, a 2% increase compared to the previous year. However, this growth rate is considered to be slowing down due to global uncertainties, including tariff measures and a trend of reducing expenditure of domestic consumers.

Trade tensions between China and Uruguay are an emerging factor, leading to negatively affect the beef trade flow between the two countries. Specifically, China is conducting an investigation related to Uruguayan beef products and has temporarily suspended imports from the Sirsil meat processing plant, raising concerns over possible disruptions in the supply chain.

Source: Agromeat.com





Any comments, please send to:

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