

Volume 6/2025



ISPAE

MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

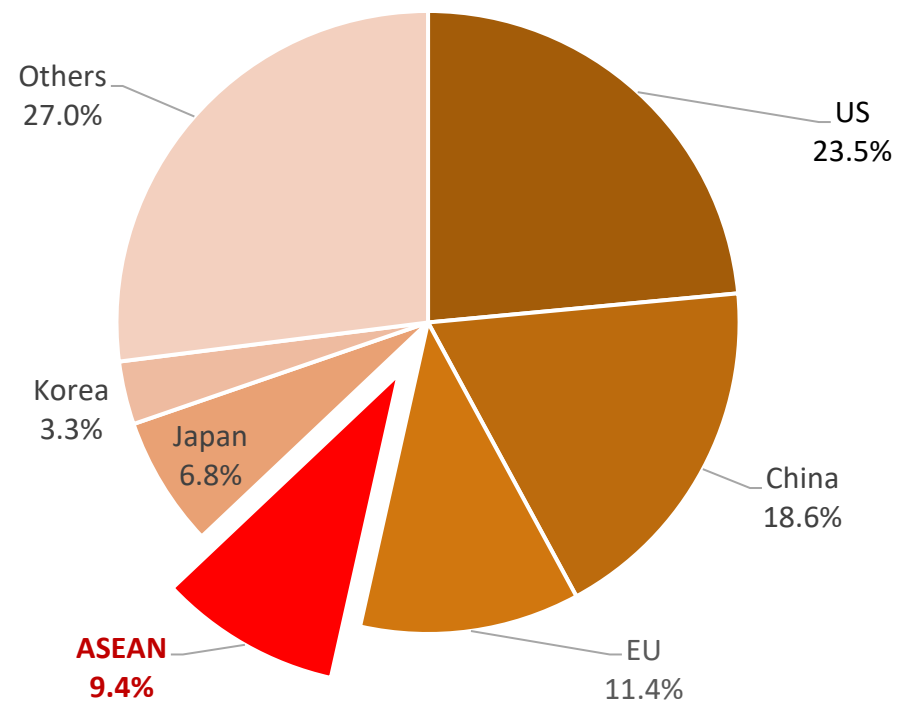
FROM VIETNAM TO **ASEAN**

Prepared by: **AGREiNFOS**



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

Export proportion of AFF product to the ASEAN, May-2025



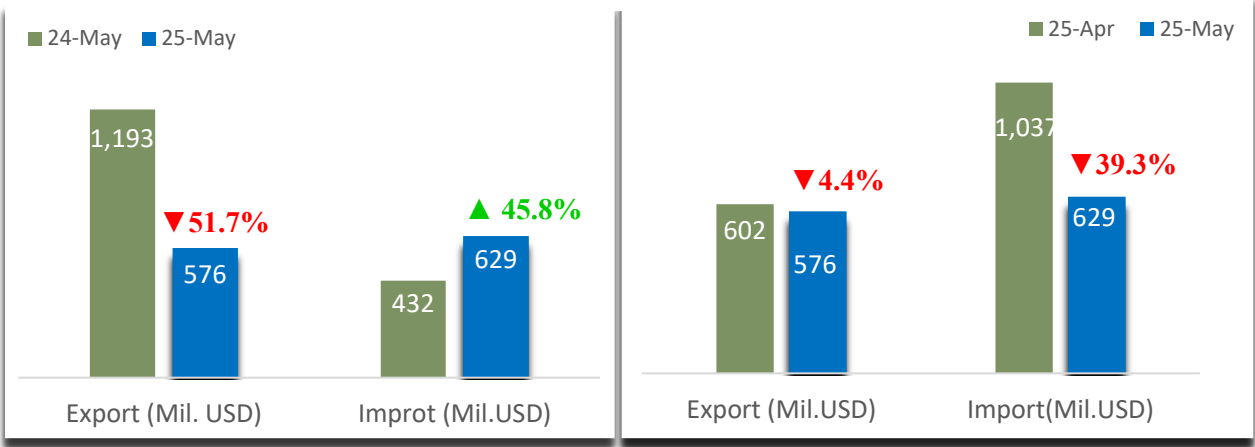
Changes in export proportion of AFF product to the ASEAN
May-2025 compared to Apr-25 and May-24

	Export value (Mil. USD)	Compared to Apr- 25	Compared to May- 24
US	1.434	▲ 2.8%	▲ 2.4%
China	1.134	▲ 0.6%	▼ 4.3%
EU	696	▼ 0.7%	▲ 3.8%
ASEAN	576	▼ 0.5%	▼ 2.3%
Japan	413	▼ 0.1%	▲ 0.3%
Korea	200	▼ 0.2%	▼ 0.6%
Total export	6.101		

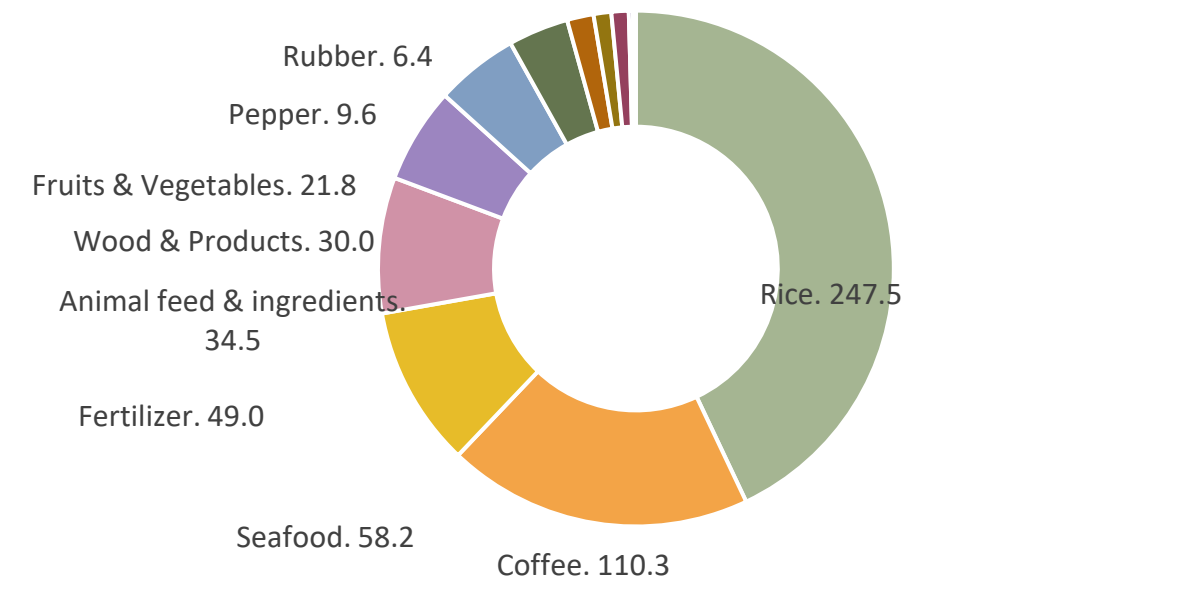
Source: Calculated from data of the Department of Customs

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

AFF product import-export turnover between Vietnam and ASEAN, May 2025



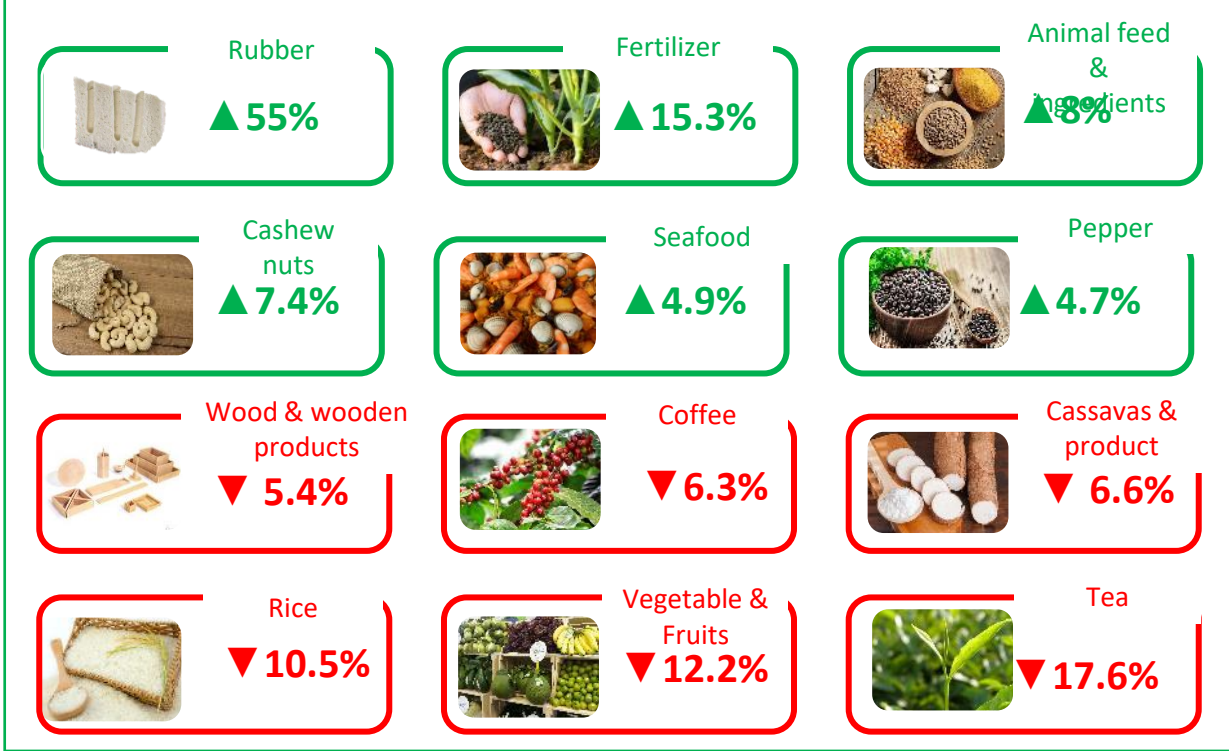
Key AFF product export value to ASEAN. May 2025



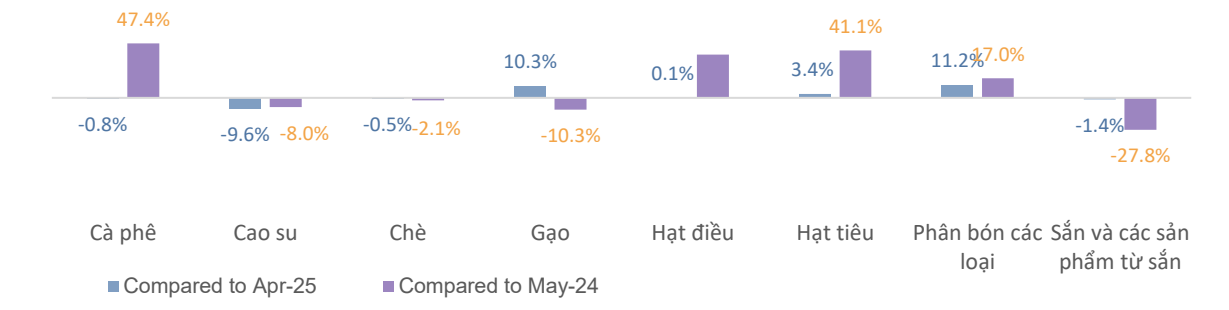
Source: Calculated from data of the Department of Customs

Unit: Mil. USD

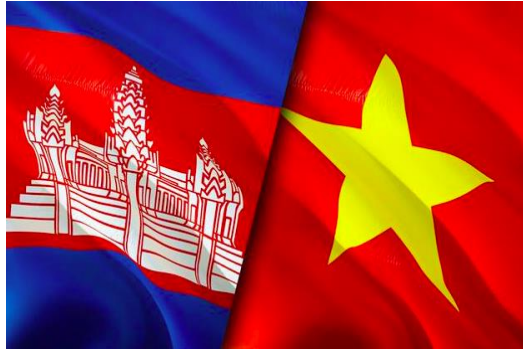
Changes in key AFF product export value to ASEAN in May 2025 compared to Apr 2025



Changes in average export value of key AFF products to ASEAN in May-25 compared to May-24 and compared to Apr-25



SPOTLIGHT



Vietnam and Cambodia promote trade cooperation



Argentina-ASEAN: Strategic Partnership in a Changing World



Vietnam and Cambodia promote trade cooperation

Vietnam and Cambodia are actively promoting bilateral trade cooperation through the Trade Partnership Cooperation Workshop held on June 20, 2025, in Phnom Penh. The event was organized by the Cambodian Ministry of Commerce and the Vietnam Trade Office in Cambodia, with the participation of more than 60 representatives from enterprises, associations, and regulatory agencies of both countries.

In the first four months of 2025, bilateral trade turnover reached over USD 3 billion, marking a 7% increase compared to the same period in 2024. Vietnam is in the top five largest investors in Cambodia, with more than 200 projects and a total registered capital of nearly USD 3 billion. The two countries have signed a bilateral trade agreement for the 2025–2026 period, aiming to reach a bilateral trade volume of USD 20 billion in the near future.

The forum also facilitates business networking, product promotion, and expansion of cooperation, with a particular emphasis on the critical role of infrastructure investment, cross-border trade, and technological innovation in fostering sustainable development and enhancing regional welfare.

Source: aseanvietnam.vn

Argentina-ASEAN: Strategic Partnership in a Changing World

On June 12, 2025, the scientific seminar on “Argentina–ASEAN: Strategic Partners in a Changing World” was held in Buenos Aires, co-organized by the Argentine National Congress and the ASEAN Committee in Buenos Aires (ACBA). The event underscored ASEAN’s growing significance, particularly in agricultural, food, and trade cooperation.

In 2023, bilateral trade volume between Argentina and ASEAN exceeded USD 9 billion, with Vietnam emerging as Argentina’s largest trading partner within ASEAN, reaching USD 3.45 billion. Scholars at the seminar commended Vietnam’s development trajectory in industrialization, digital transformation, and international integration.

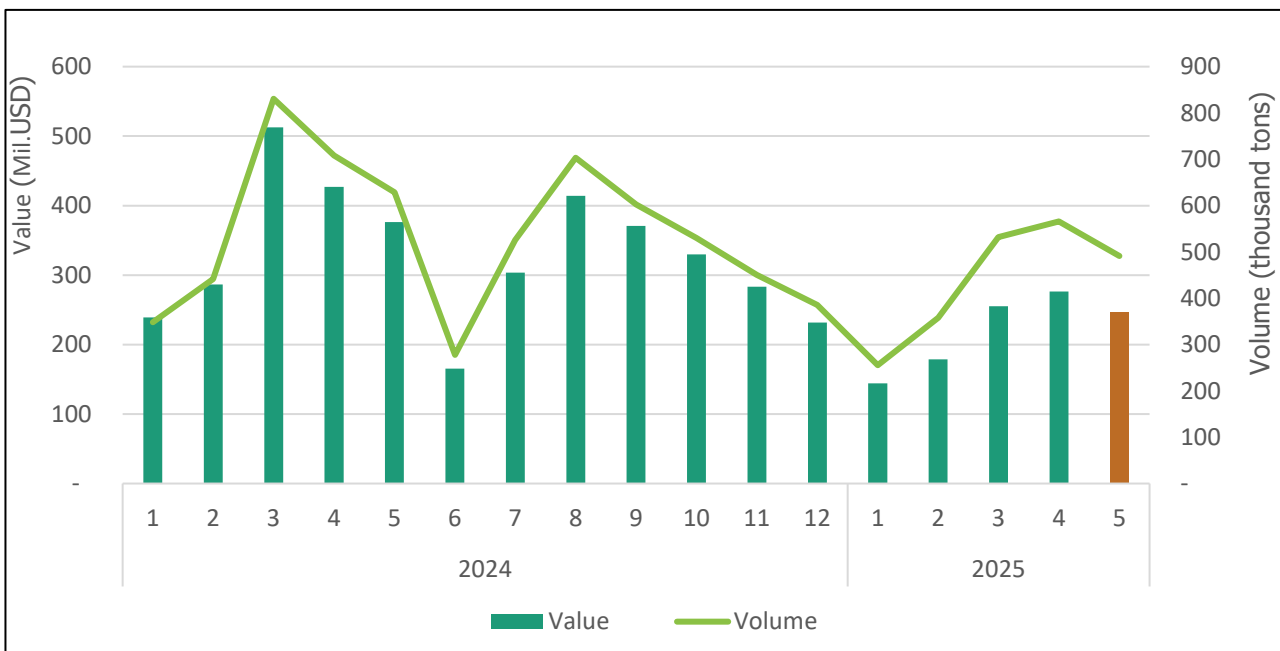
The discussions also highlighted the substantial cooperation potential in Halal industries, technology, education, and cultural exchange, pointing to promising avenues for deeper bilateral and multilateral engagement.

Source: aseanvietnam.vn

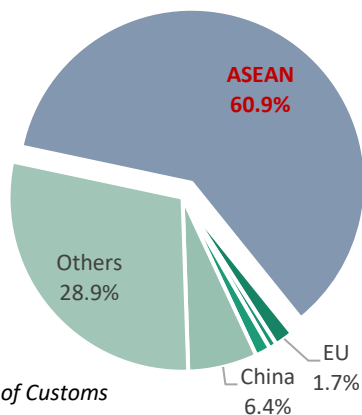


RICE

Export volume and value to ASEAN, May-2025



Percentage of export value to ASEAN, May-2025



Export results to ASEAN, May-2025

VALUE

247.5 Mil.USD

↘ Decrease **10.5%** compared to Apr-25

↘ Decrease **34.2%** compared to May-24

↘ **80.8 Mil USD** less than the monthly average rate in 2024.

◇ Accumulated 5 month of 2025 reaches **1.1** Bil. USD, and the rate is **28.0%** of the total in 2024.

VOLUME

491.4 thousand tons

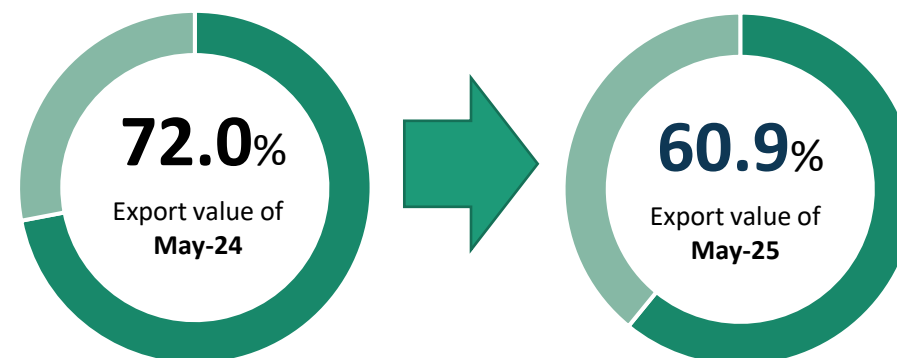
↘ Decrease **13.1%** compared to Apr-25

↘ Decrease **21.8%** compared to May-24

↘ **44.6 thousand tons** less than the monthly average rate in 2024.

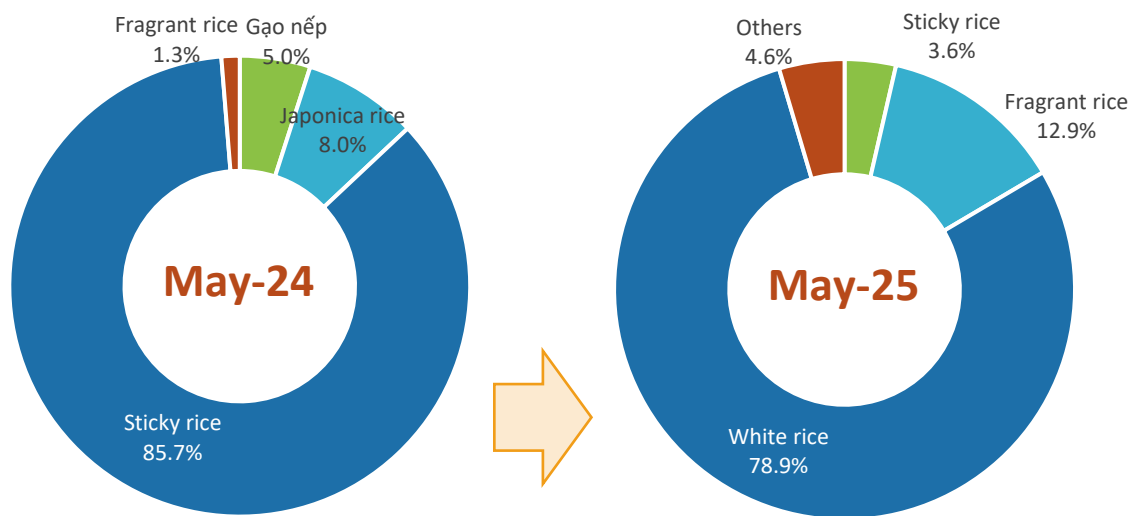
◇ Accumulated 5 month of 2025 reaches **2.2** Mil tons, and the rate is **34.2%** of the total in 2024.

Changes in the percentage of export value to ASEAN, May-2025





Structure of exports by products to ASEAN, May-2025



Export results to ASEAN, May-2025



White rice

Value: **196.2** Mil.USD

Decrease **7%** Compared to Apr-25

Decrease **39%** compared to May-24



Fragrant rice

Value: **32.1** Mil.USD

Decrease **23%** Compared to Apr-25

Increase **6%** compared to May-24



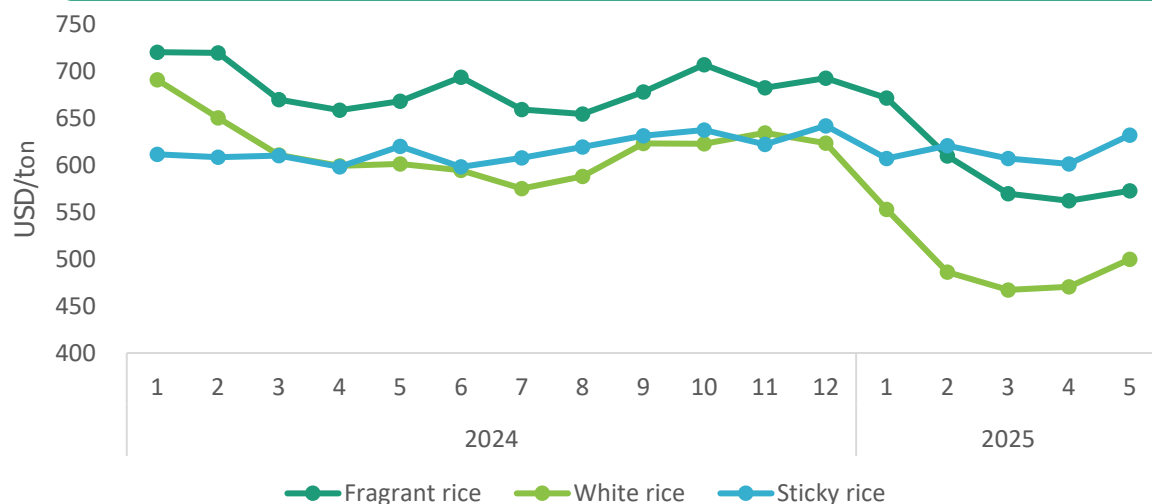
Sticky rice

Value: **8.9** Mil.USD

Decrease **44%** Compared to Apr-25

Decrease **52%** compared to May-24

Average export price to ASEAN, May-2025



Sticky rice

The average export price in May-25 is **616** USD/ton; Increase **5%** compared to the previous month; and Increase **2%** compared to the same month in 2024.

Fragrant rice

The average export price in May-25 is **573** USD/ton; Increase **2%** compared to the previous month; and Decrease **14%** compared to the same month in 2024.

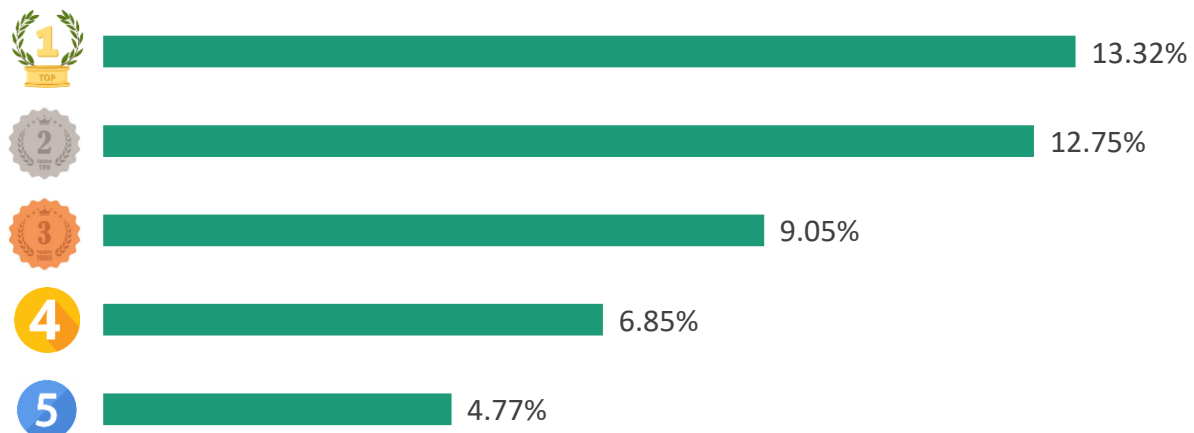
White rice

The average export price in May-25 is **500** USD/ton; Increase **6%** compared to the previous month; and Decrease **17%** compared to the same month in 2024.

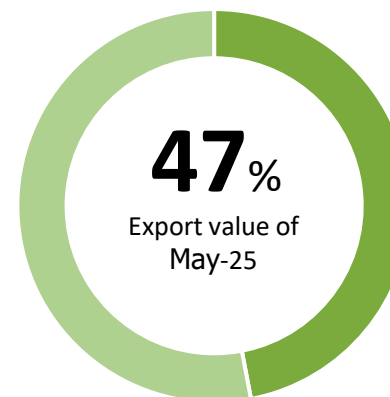


RICE

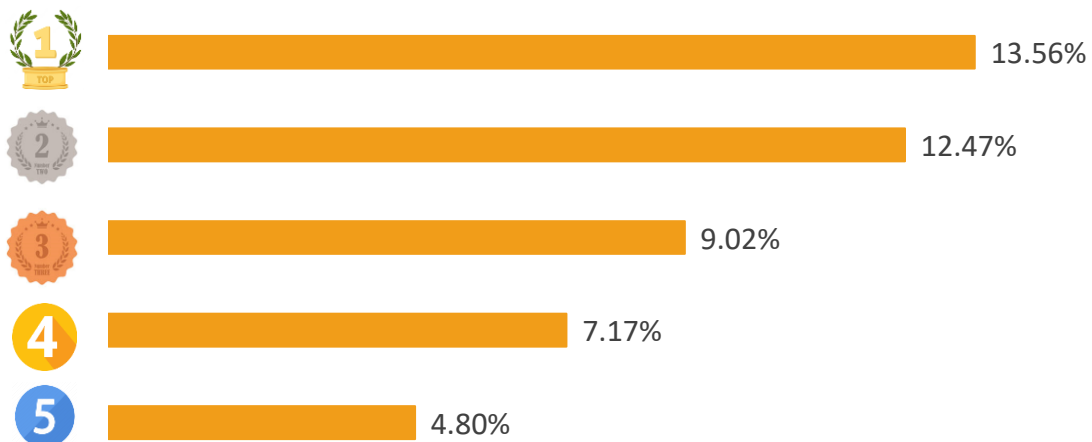
Top 5 export enterprises by value to ASEAN, May-2025



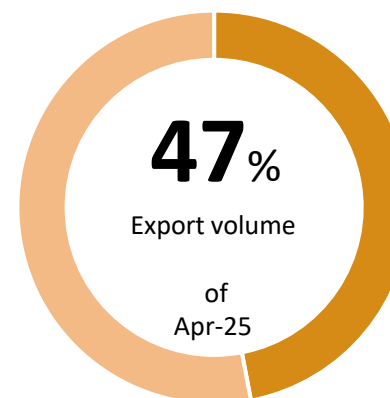
Value ratio of Top 5 export enterprise to ASEAN, May-2025



Top 5 export enterprises by volume to ASEAN, May-2025



Volume ratio of Top 5 export enterprise to ASEAN, May-2025





RICE

SPOTLIGHT

01

In the first two months of the 2025/2026 fiscal year (beginning April 1, 2025), Myanmar exported over 402,283 metric tons of rice and broken rice, including approximately 217,070 tons of rice and 185,213 tons of broken rice. Of this volume, more than 402,000 tons were shipped via maritime routes, while 280 tons were exported overland to neighboring countries. In 2024/2025 fiscal year (April 1, 2024 – March 31, 2025), Myanmar exported a total of 2.48 million tons of rice and broken rice, generating revenue of over USD 1.129 billion. For the current season, MRF has set a target of 2.5 million tons in rice exports.

The Ministry of Commerce is coordinating with the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), the Myanmar Rice Federation, and other industry associations to ensure monthly export progress and to facilitate rice trade operations.

Source: gnln.com

02

In the first five months of 2025, rice imports of Philippines declined significantly to 1.7 million metric tons, a 20.9% decrease compared to the same period last year. The primary reason for this drop was an increase in domestic rice production, which reached 4.69 million metric tons in Q1 2025. USDA forecasts that Philippines will be the world's largest rice importer in 2025, with projected imports of 5.4 million metric tons, rising to 5.5 million metric tons in 2026 due to growing demand driven by population growth and tourism.

The Philippine government has reduced the rice import tariff to 15% until 2028, with quarterly reviews to monitor its impact. Agriculture Secretary Francisco Tiu Laurel Jr. stated that the government may consider gradually increasing import tariffs during the upcoming harvest season to support local farmers and maintain supply-demand balance..

Source: retailnews.asia





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN. May-25



Export results to the ASEAN. May-25

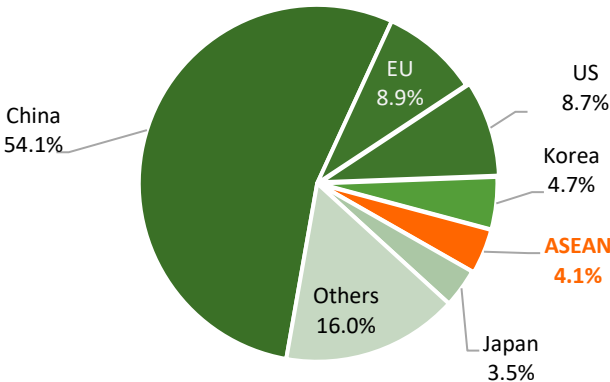
VALUE
25.2
Mil.USD

Decrease **7.3%** compared to Apr-25

Decrease **7.4%** compared to May-24
11.2 Mil.USD less than the monthly average rate in 2024.

Accumulated 5 month of 2025 reaches **149.6 Mil.USD**, and the rate is **34.2%** of the total in 2024.

Percentage of export value to the ASEAN. May-25



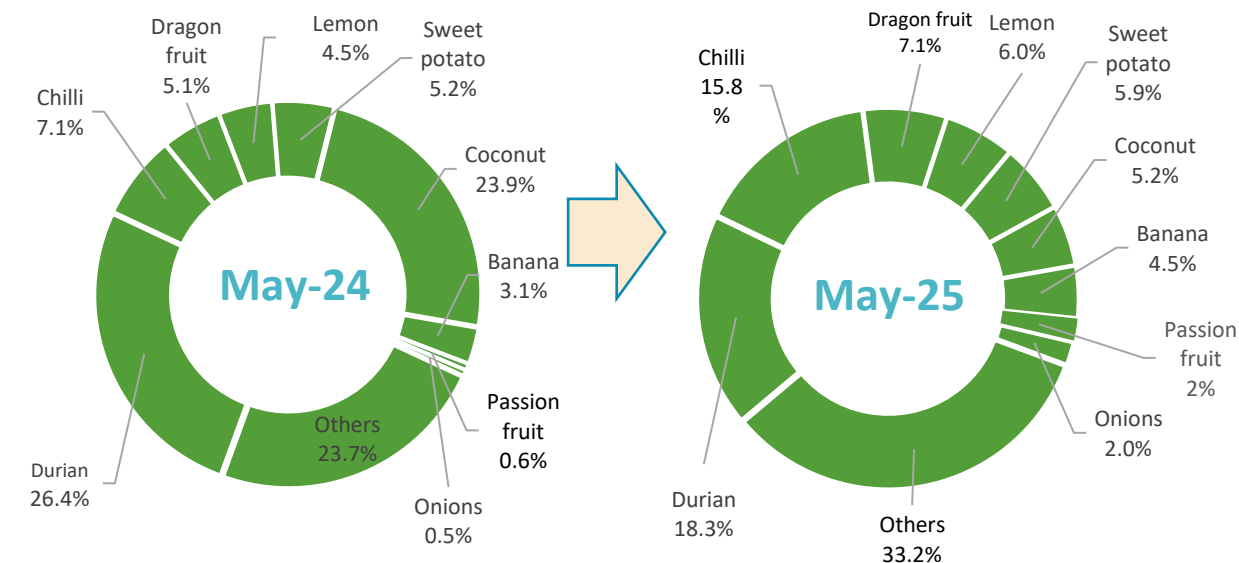
Changes in percentage of export value to the ASEAN. May-25





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN. May-25



Export results to the ASEAN. May-25



Durian

Value: **4.6** Mil.USD

Decrease **7.2%** compared to Apr-25

Decrease **36.0%** compared to May-24



Chillis

Value: **4.0** Mil.USD

Increase **9.0%** so với T3/2025

Increase **105.0%** compared to May-24



Dragon Fruit

Value: **1.8** Mil.USD

Decrease **12.0%** compared to Apr-25

Increase **29.9%** compared to May-24



Lemon

Value: **1.5** Mil.USD

Increase **24.5%** compared to Apr-25

Increase **23.3%** compared to May-24



Sweet potato

Value: **1.5** Mil.USD

Increase **0.5%** compared to Apr-25

Increase **6.2%** compared to May-24



Coconuts

Value: **1.3** Mil.USD

Decrease **55.5%** compared to Apr-25

Decrease **79.8%** compared to May-24



Banana

Value: **1.1** Mil.USD

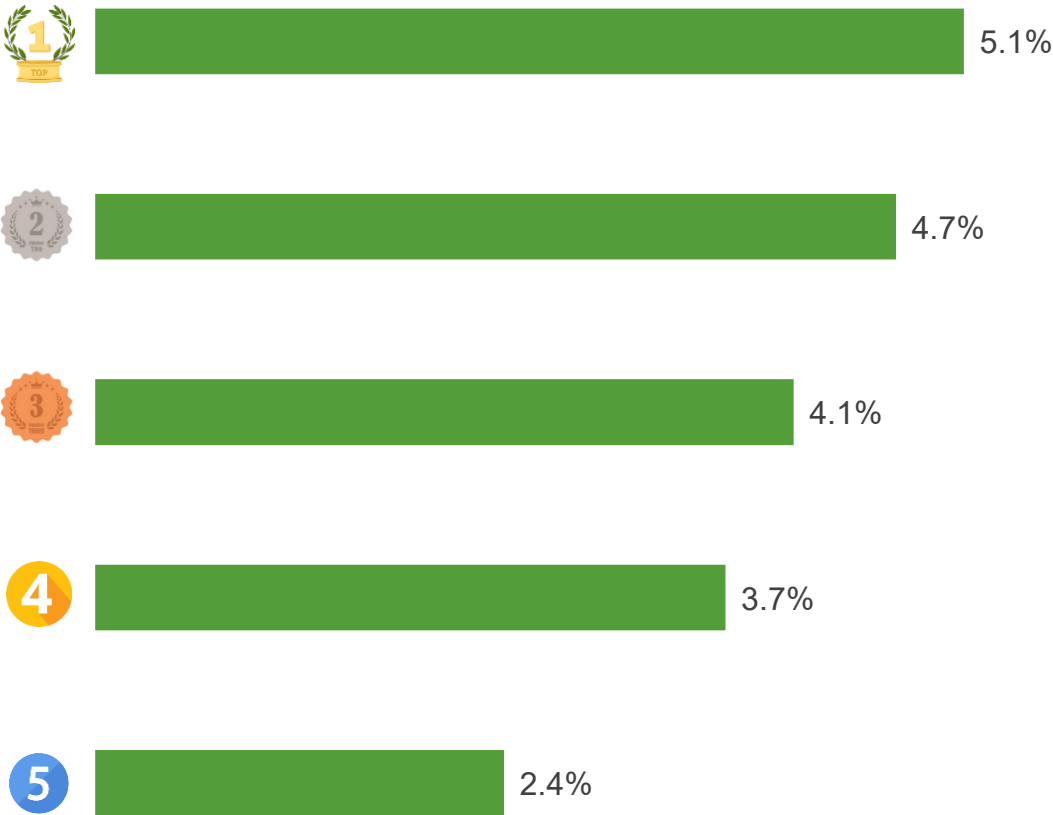
Decrease **7.4%** compared to Apr-25

Increase **33.8%** compared to May-24

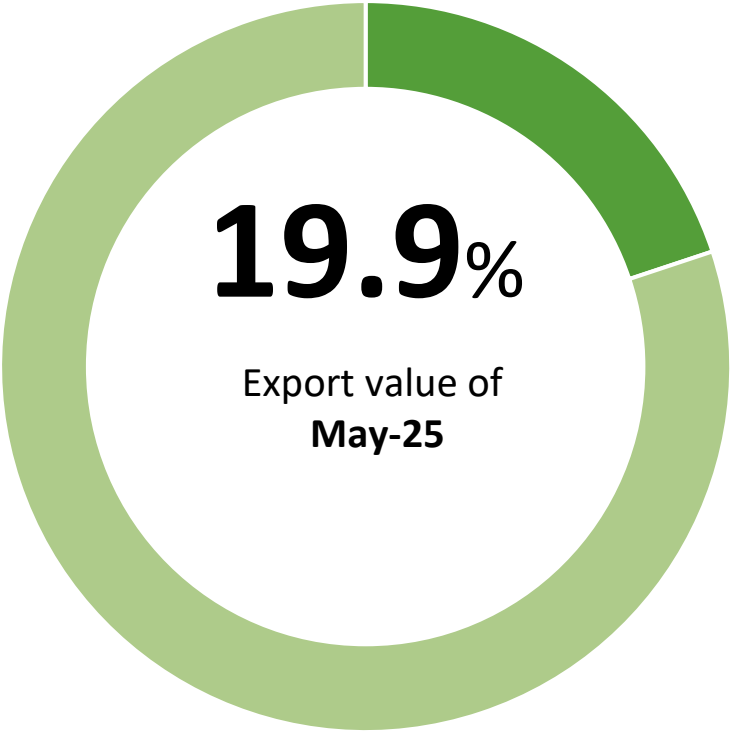


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, May-2025



Value ratio of TOP 5 export enterprises to the ASEAN, May-2025



Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, May-2025



Import results to the ASEAN, May-2025

VALUE



41.5

Mil.USD

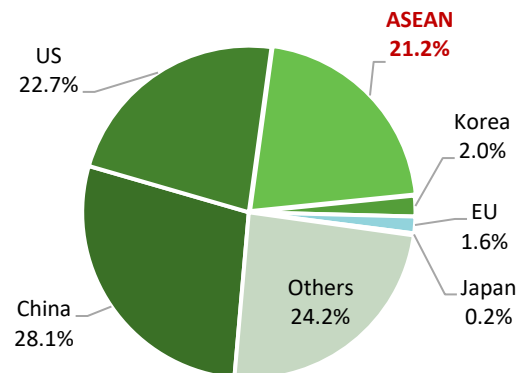
Increase **25.3%** compared to Apr-25

Increase **69.3%** compared to May-24

15.8 Mil.USD more than the monthly average rate in 2024.

Accumulated 5 month of 2025 reaches **153.7 Mil.USD**, and the rate is **49.7%** of the total in 2024.

Percentage of import value to the ASEAN, May-2025



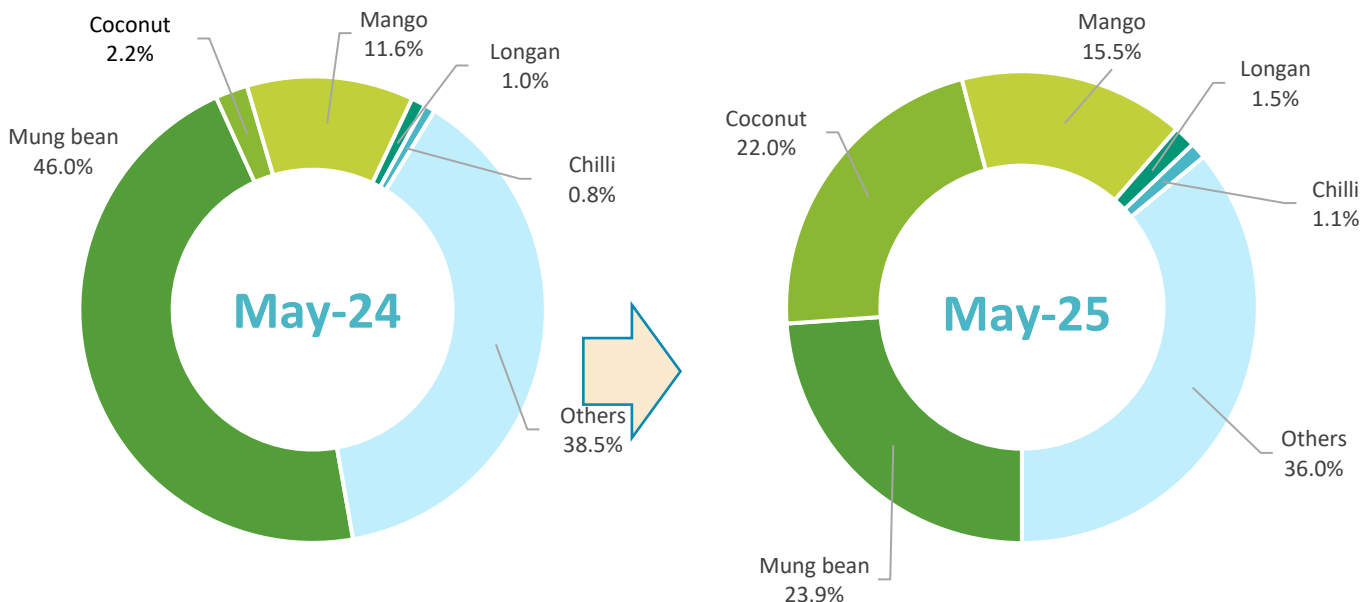
Changes in percentage of import value to the ASEAN, May-2025





FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, May-2025



Mango

Value: **6.4** Mil.USD

Decrease **5.9%** compared to Apr-25

Increase **126.7%** compared to May-24



Longan

Value: **0.63** Mil.USD

Decrease **48.9%** compared to Apr-25

Increase **160.0%** compared to May-24

Import results from the ASEAN, May-2025



Mung bean

Value: **9.9** Mil.USD

Decrease **10.1%** compared to Apr-25

Decrease **12.0%** compared to May-24



Coconuts

Value: **9.1** Mil.USD

Increase **221.9%** compared to Apr-25

Gấp **16.6** lần compared to May-24



Chilli

Value: **0.47** Mil.USD

Increase **34.8%** compared to Apr-25

Increase **153.3%** compared to May-24



Thai AirAsia buys 1,000 tons of fruit for in-flight menu to support farmers

Thai AirAsia announced its decision to procure 1,000 metric tons of fruits—including longan, mangosteen, and pineapple—directly from local farmers to incorporate into its in-flight menu on all domestic and international routes starting July 2025. The objective of this initiative is to support growers by creating added value and reducing post-harvest losses. This effort is part of the airline's “Fruits On Board” strategy, which aims to expand agricultural distribution channels, increase farmers’ income, and enhance the culinary experience for passengers on board.

Source: Guojiguoshu.com

Thailand holds fruit festival to boost domestic consumption

Thailand will organize “Thailand Fruit Festival 2025” to boost domestic consumption and stabilize fruit prices, particularly for durian. The festival will take place across 13 markets in Bangkok and its outskirts, featuring a range of promotional programs, such as durian priced at 99 THB per fruit (approximately USD 2.75) and tiered pricing from 99 to 199 THB per kilogram (around USD 2.75–5.53/kg), allowing consumers to choose based on their preferences.

Each day, more than 50 metric tons of fruit are expected to be distributed. A special highlight event will be held at Siam Square from June 19 to 22, showcasing premium fruits from Thailand’s renowned growing regions.

Source: Vietnambiz.vn



Philippines doubles coconut replanting target by 2026

Philippines is promoting its coconut replanting program to regain its position as the world's top coconut producer which lost to Indonesia nearly three decades ago. While the country remains the global leader in coconut exports, it currently ranks second in production volume.

Philippines has now set a target to plant 50 million coconut trees by 2026, effectively doubling its original goal. This accelerated plan is part of a five-year initiative launched in 2023, aiming to plant 100 million coconut trees by 2028. In 2024, more than 8.5 million trees were planted, with an additional 15 million trees expected by the end of the year.

Source: Freshplaza.com

Indonesia discusses to expand tropical fruit market in New Zealand

Following the successful export of pineapples to New Zealand, Indonesia is seeking to expand its exports of other tropical fruits, including bananas, mangoes, and papayas. During a bilateral meeting on the sidelines of the OECD Ministerial Council Meeting on June 4, 2025, Indonesia proposed strengthening cooperation in technical standards, food safety, and the adoption of electronic certification systems.

The initiative aims to raise bilateral trade volume to NZD 6 billion (approximately USD 3.7 billion) by 2029. This move enables Indonesia to capitalize on New Zealand's open market policies and respond to the growing demand for tropical fruits in the country.

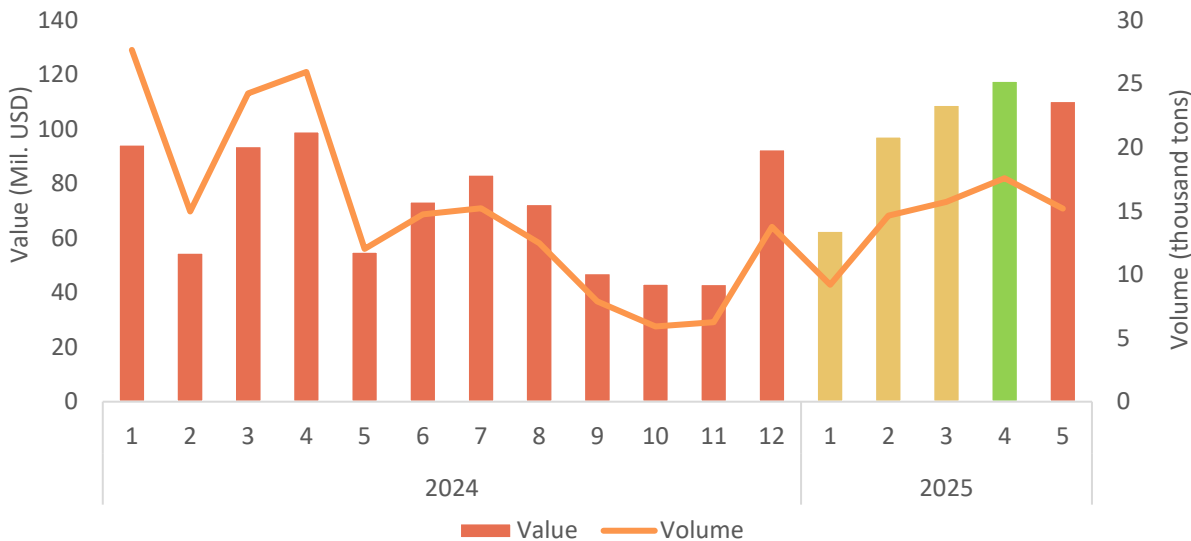
Source: Freshplaza.com



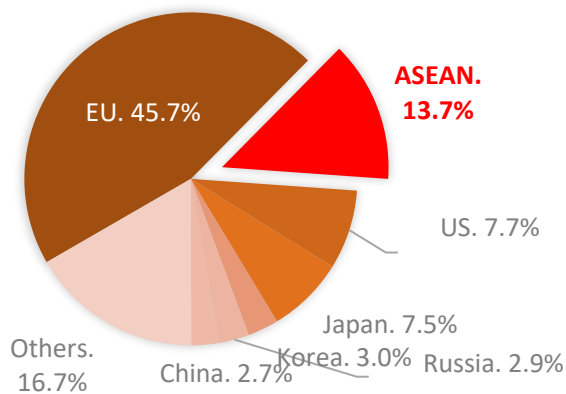


COFFEE

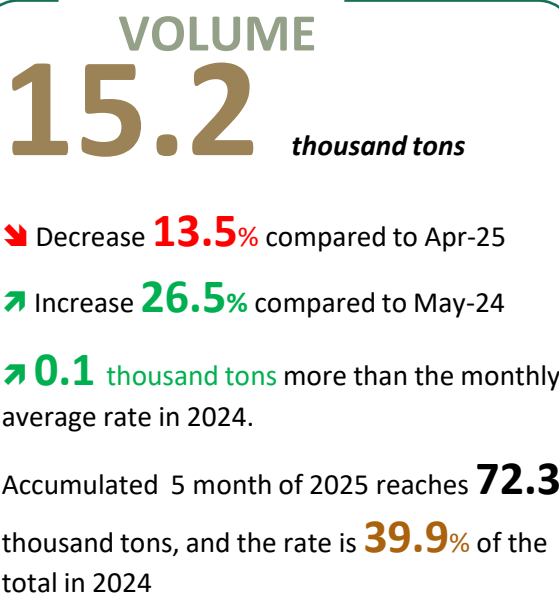
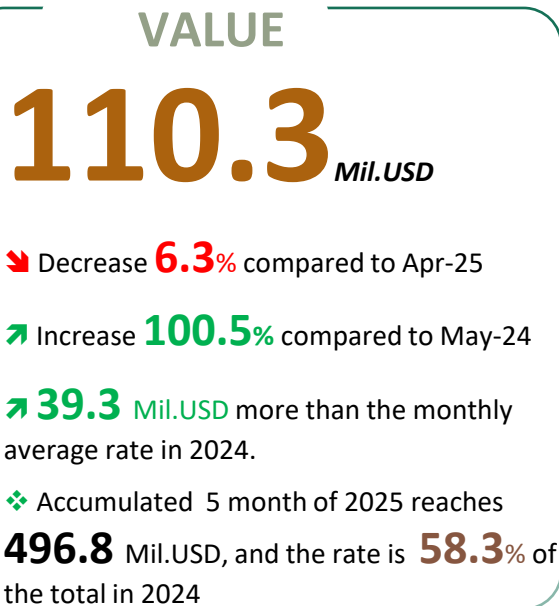
Export volume and value to ASEAN, May-2025



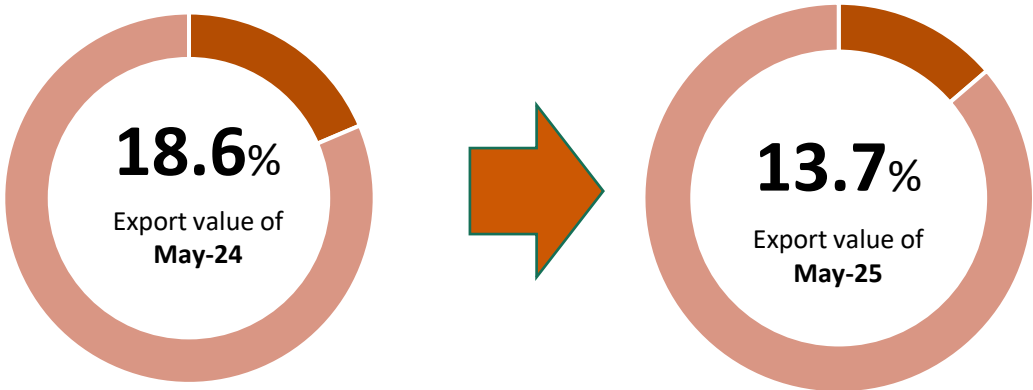
Percentage of export value to ASEAN, May-2025



Export results to ASEAN, May-2025



Changes in percentage of export value to ASEAN, May-2025

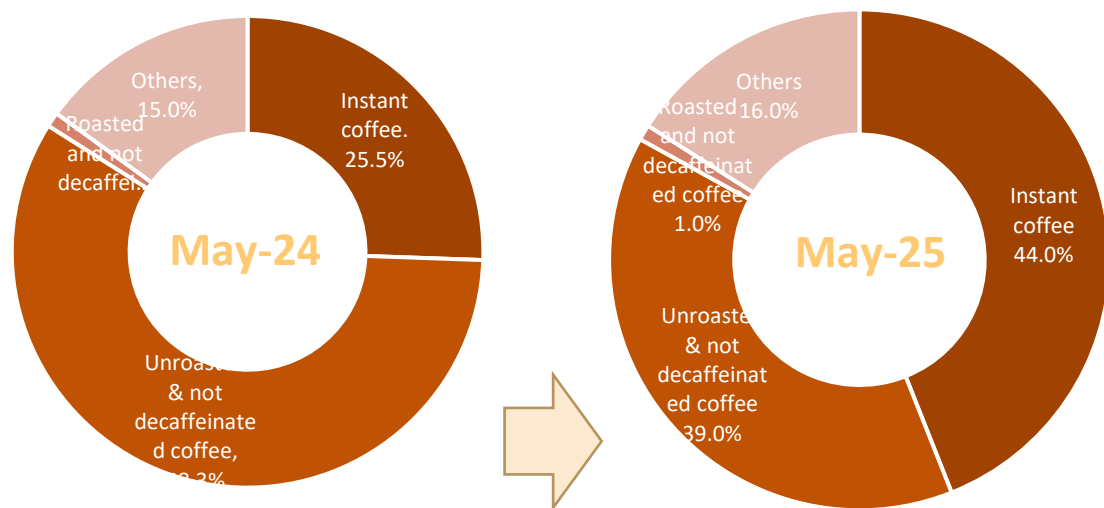


Source: Calculated from data of the Department of Customs

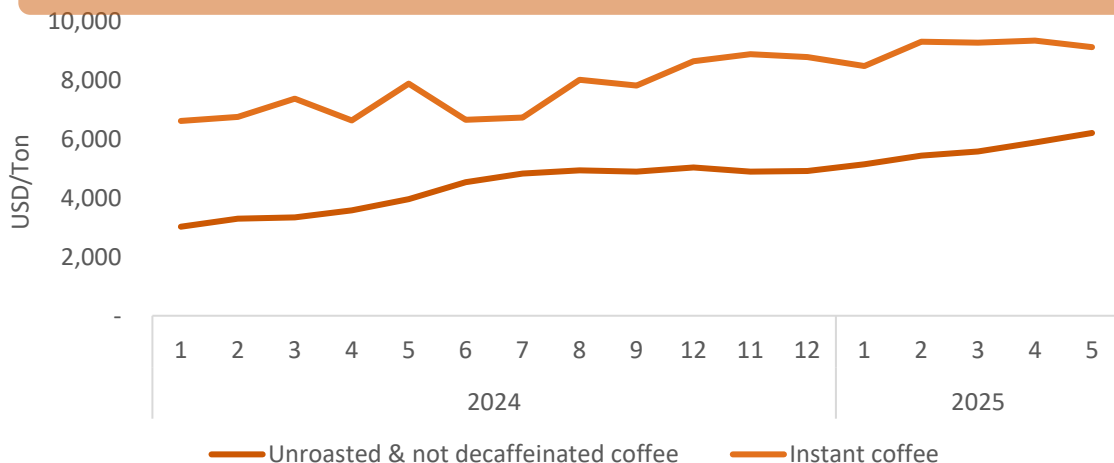


COFFEE

Structure of exports by products to ASEAN, May-2025



Average export price to ASEAN, May-2025



Export results to ASEAN, May-2025



Unroasted & not decaffeinated coffee

Value: **42.7** Mil.USD
Decrease **34.9%** compared to Apr-25
Increase **37%** compared to May-24



Instant coffee

Value: **48.6** Mil.USD
Increase **38.4%** compared to Apr-25
Increase **256%** compared to May-24



Others

Value: **18.1** Mil.USD
Increase **13.4%** compared to Apr-25
Increase **129%** compared to May-24

Instant coffee

The average export price in May-25 is **9.114** USD/ton. Decrease **2.4%** compared to the previous month, and increase **15.7%** compared to the same month in 2024.

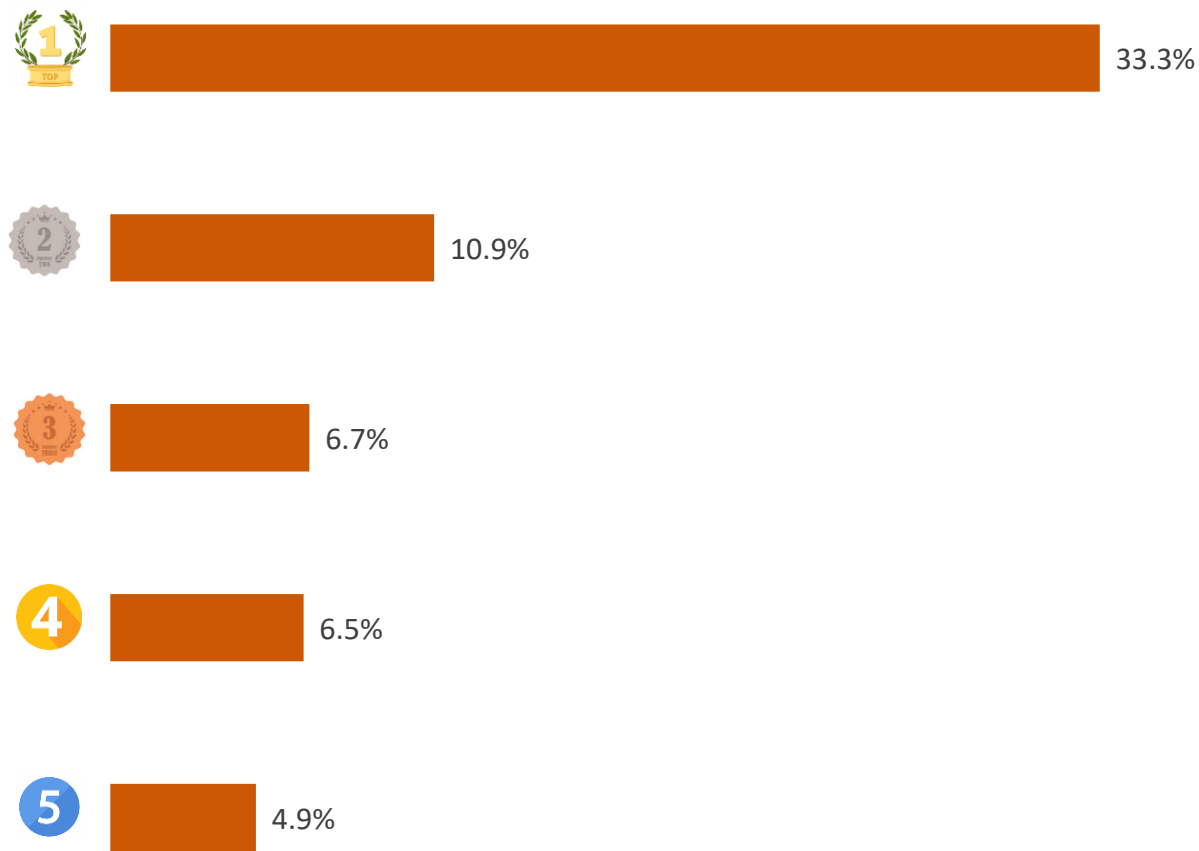
Unroasted & not decaffeinated coffee

The average export price in May-25 is **6.204** USD/ton; Increase **5.5%** compared to the previous month, and increase **56.8%** compared to the same month in 2024.

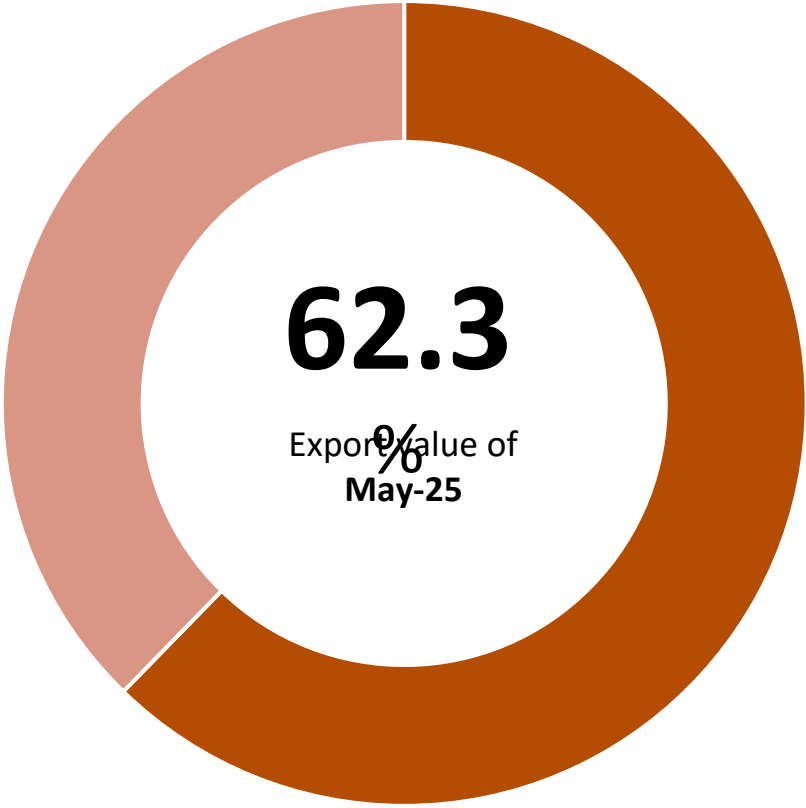


COFFEE

TOP 5 export enterprises by value to ASEAN, May-2025



Value ratio of TOP 5 export enterprises to ASEAN, May-2025



Source: Calculated from data of the Department of Customs



On May 16, 2025, the ASEAN Coffee Federation (ACF) officially launched the ASEAN Coffee Appreciation Protocol (ACAP)—a regional coffee quality assessment system developed by experts of Southeast Asia. The system was developed by the ASEAN Coffee Institute (ACI) to support training and valuation needs based on regional standards.

ACAP is an alternative to the Coffee Value Assessment (CVA) framework currently being promoted globally by the Specialty Coffee Association (SCA) in the United States and the United Kingdom, especially in Indonesia.

The ACAP framework consists of six core evaluation modules: (1) Technical Assessment – covering cultivation, processing, transportation, and storage; (2) Descriptive Sensory Evaluation – analyzing the flavor profile of green coffee beans; (3) Roasting Evaluation – assessing quality post-roasting; (4) Brewing Evaluation – examining effectiveness and methods of coffee preparation; (5) Consumer Perception Evaluation – capturing feedback on quality from end-users; (6) Skill Assessment – designed for barista training and certification.





- **Indonesia's coffee production** for the 2025/26 crop year is projected to reach 11.3 million 60-kg bags, representing a 5% increase year-on-year, driven by favorable weather conditions and greater use of agricultural inputs, particularly in Robusta-growing provinces such as South Sumatra. Robusta accounts for approximately 87% of the country's total coffee output.
- **Exports** are expected to rise by 7% to 6.5 million bags, with major destinations including the European Union (1.4 million bags) and the United States (726,000 bags between March 2024 and February 2025, a 23% increase). However, shipments to the U.S. may decline if the proposed 32% tariff by President Donald Trump takes effect in July 2025. Additionally, the EU Deforestation Regulation (EUDR), will be enforced by the end of 2025 and impose compliance pressures on exporters.
- **Domestic consumption** is expected to rise slightly to 4.81 million bags, as consumers increasingly turn to low-cost products and ready-to-drink (RTD) coffee options.



FISHERIES

Export value to ASEAN, May-2025



Export results to ASEAN, May-2025

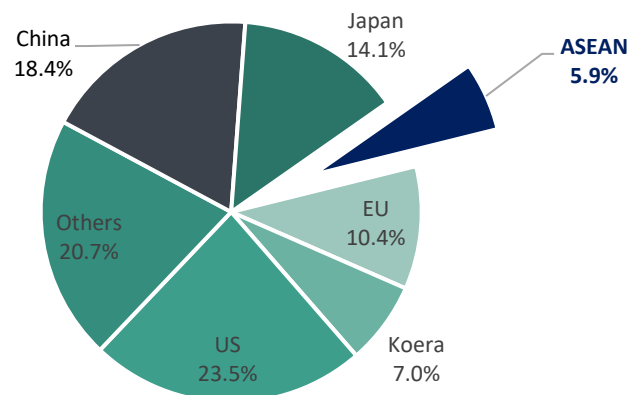
VALUE



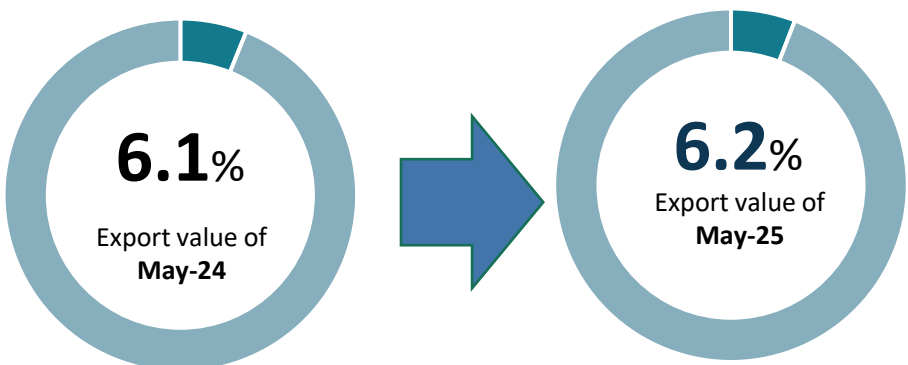
58.4 Mil.USD

- Increase **5.1%** compared to Apr-25
- Increase **15.9%** compared to May-24
- ▲ **5.5 Mil.USD** more than the monthly average rate in 2024.
- ◇ Accumulated 5 month of 2025 reaches 269.0 Mil.USD, and the rate is **42.4%** of the total in 2024.

Percentage of export value to ASEAN, May-2025



Change in percentage of export to ASEAN, May-2025

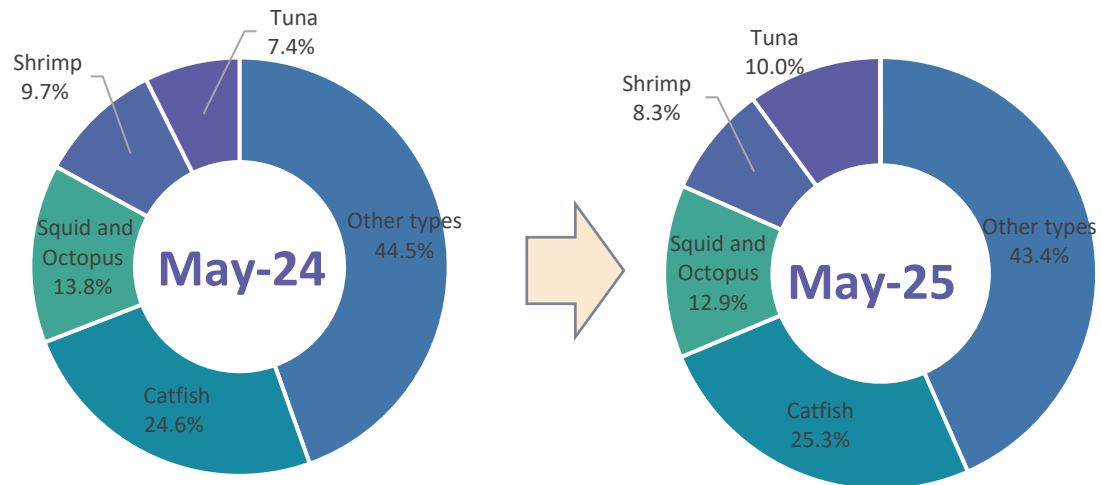


Source: Calculated from data of the Department of Customs

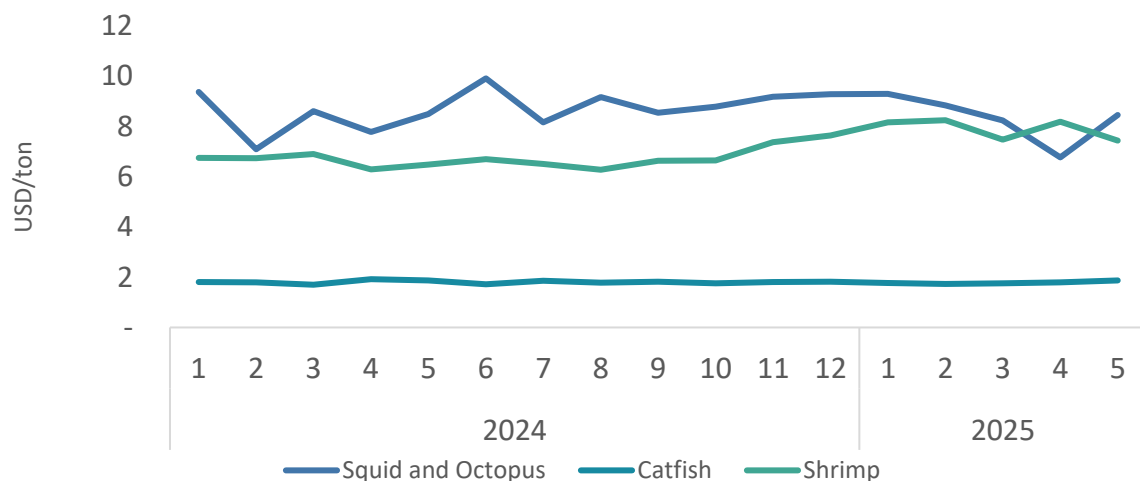


FISHERIES

Structure of exports by products to ASEAN, May-2025



Average export price to ASEAN, May-2025



Export results to ASEAN, May-2025



Catfish

Value: **14.9** Mil.USD

Increase **6.2%** compared to Apr-25

Increase **19.4%** compared to May-24



Squid & Octopus

Value: **7.5** Mil.USD

Increase **10.7%** compared to Apr-25

Increase **8.3%** compared to May-24



Shrimp

Value: **4.9** Mil.USD

Decrease **7.8%** compared to Apr-25

Decrease **0.4%** compared to May-24

Squid & Octopus

The average export price in May-25 is **8.4 USD/kg**; Increase **24.9%** compared to the previous month; and Decrease **0.5%** compared to the same month in 2024.

Catfit

The average export price in May-25 is **1.9 USD/kg**; Increase **4.6%** compared to the previous month; and Decrease **0.1%** compared to the same month in 2024.

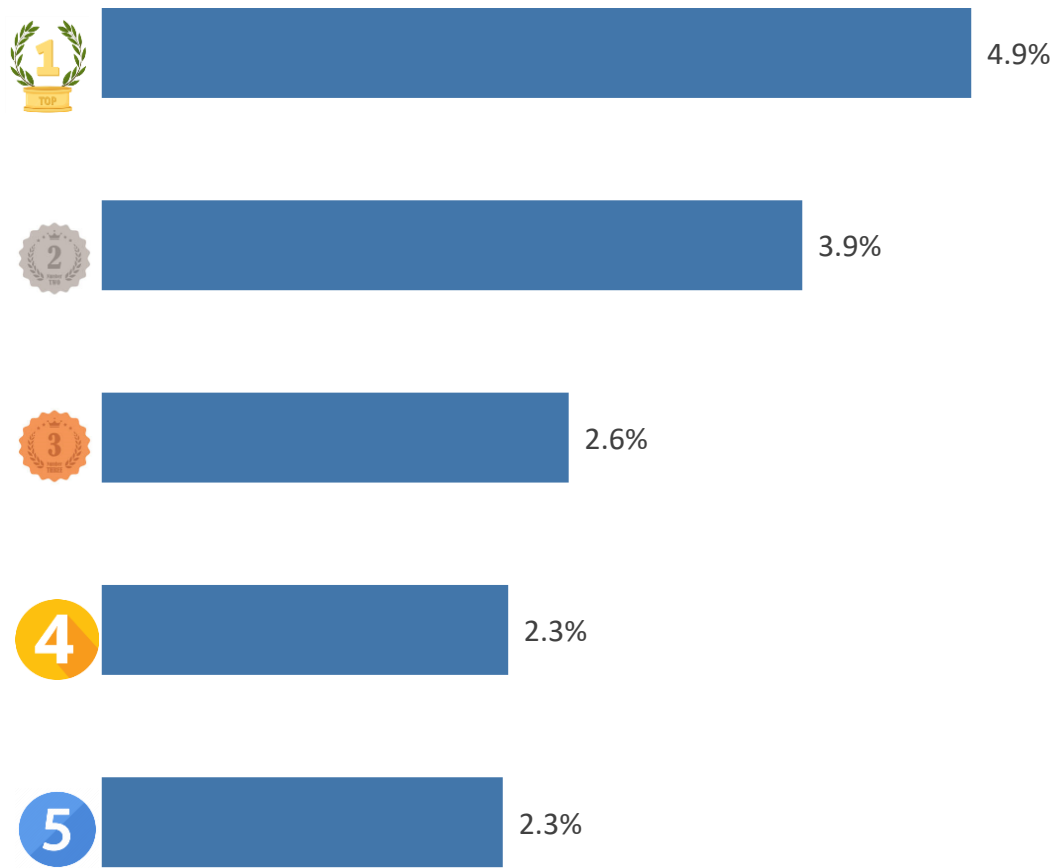
Shrimp

The average export price in May-25 is **8.2 USD/kg**; Increase **14.7%** compared to the previous month; and Decrease **9.2%** compared to the same month in 2024.

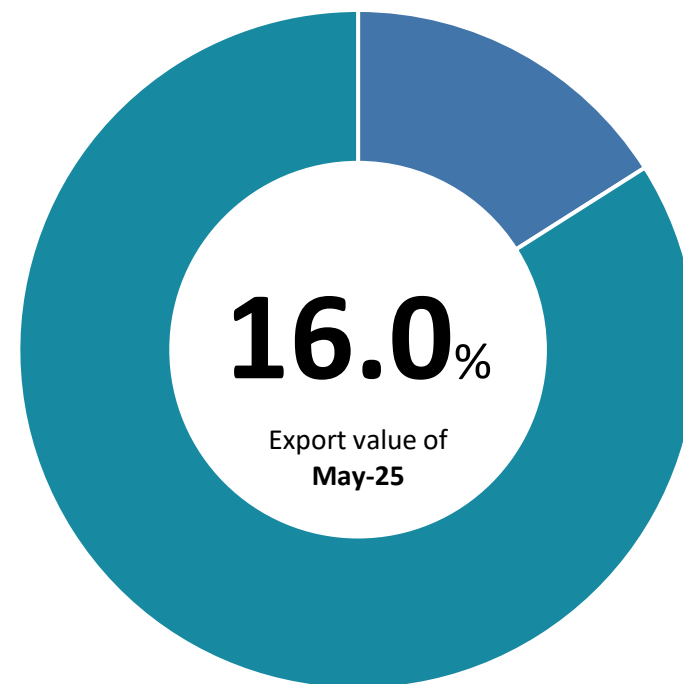


FISHERIES

TOP 5 export enterprises by value to ASEAN, May-2025



Value ratio of TOP 5 export enterprises to ASEAN, May-2025



01

Thai Union introduces SeaChange 2030 initiative

At the United Nations Ocean Conference from June 9–13, 2025, in Nice, France, Thai Union introduces its SeaChange 2030 sustainable development strategy, featuring 11 commitments aimed at protecting the oceans, in alignment with UN Sustainable Development Goal 14. The company plans to invest USD 200 million in these initiatives by 2030.

According to 2024 Sustainability Report, 98.9% of the company's tuna volume was sourced from fisheries either certified by the Marine Stewardship Council (MSC) or engaged in Fishery Improvement Projects (FIPs)—a 14% increase over the previous year. On-the-ground monitoring coverage in the tuna supply chain reached 97%, with a target of 100% by 2025.

Thai Union also reported a 21% reduction in Scope 1 and 2 greenhouse gas emissions, certified 23 out of 32 facilities as zero-landfill, launched the Lower Carbon Shrimp program to reduce emissions in shrimp production, and removed 234 metric tons of plastic from the marine environment.

Source: Seafood Source





WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, May-2025



Export results to ASEAN, May-2025



30
Mil.USD

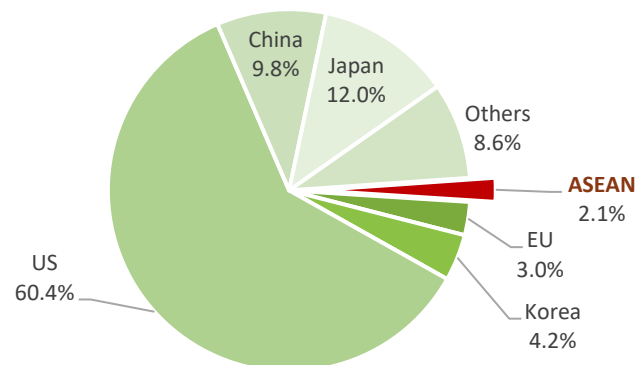
Decrease **5.4%** compared to Apr-25

Increase **26.0%** compared to May-24

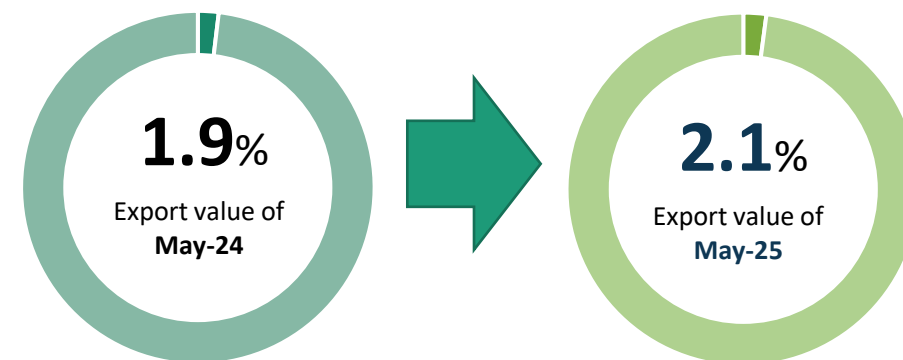
↑ **2.6 Mil.USD** more than the monthly average rate in 2024.

Accumulated 5 month of 2025 reaches **146.9 Mil.USD**, and the rate is **44.7%** of the total in 2024.

Percentage of export value to ASEAN, May-2025



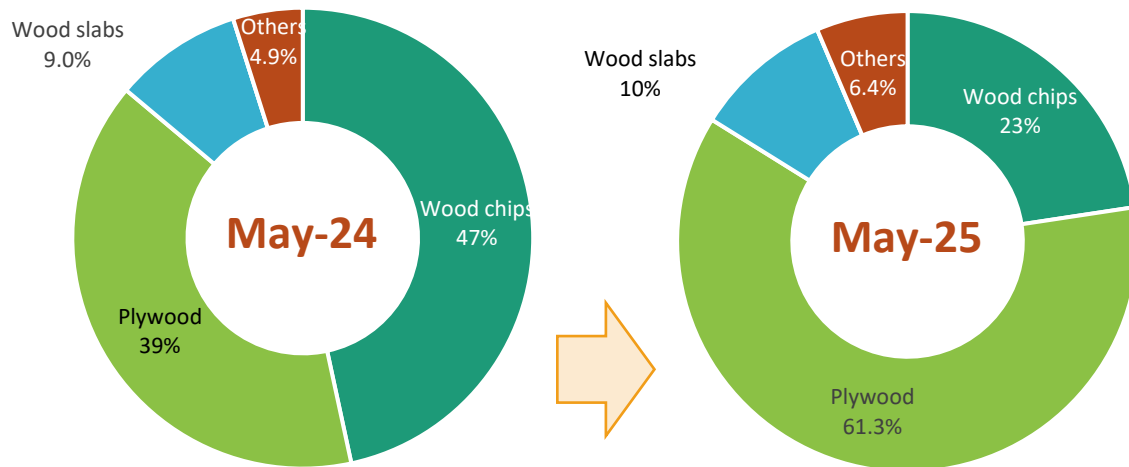
Changes in percentage of export value to ASEAN, May-2025





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, May-2025



Export results to ASEAN, May-2025



Plywood

Value: **23.8** Mil.USD

Decrease **6%** Compared to Apr-25

Increase **43%** compared to May-24



Wood chips

Value: **8.8** Mil.USD

Decrease **43%** Compared to Apr-25

Decrease **55%** compared to May-24



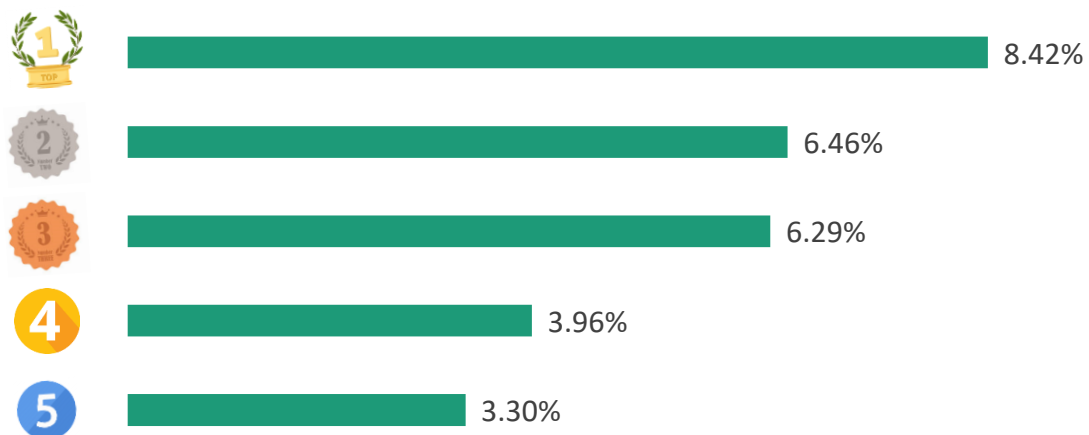
Wood slabs

Value: **3.8** Mil.USD

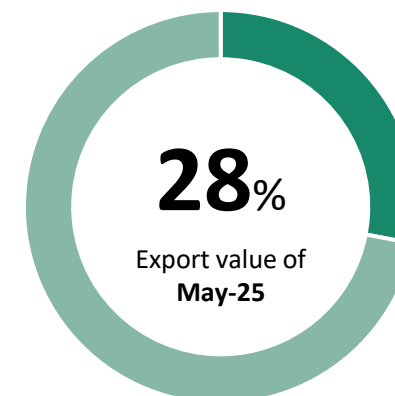
Increase **5%** Compared to Apr-25

Increase **0%** compared to May-24

TOP 5 export enterprises by value to ASEAN, May-2025



Value ratio of TOP 5 export enterprises to ASEAN, May-2025



WOOD & WOODEN PRODUCTS

SPOTLIGHT



Malaysia's wood exports have opportunity to improve competitive advantages in the U.S. market because the US imposed higher tariffs on key competitors such as Vietnam (up to 46%) and Indonesia, while Malaysia faces a lower rate of 24%. The U.S. is currently the Malaysia's largest export destination, accounting for more than half of the total export value of Malaysian furniture. However, the tariffs announced in April have been temporarily suspended for 90 days and may be subject to adjustments through tariff negotiations.

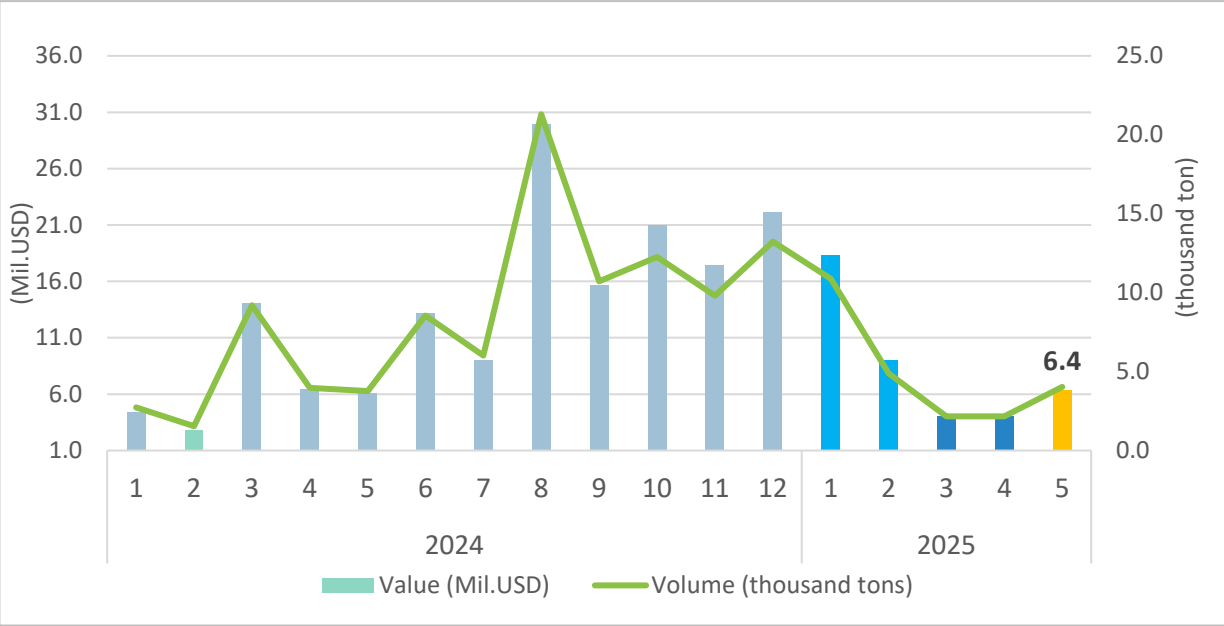
According to Mr. Wan Tarmeze, Director of the Forest Products Division at FRIM, Malaysia's furniture industry remains heavily reliant on processed wood, which makes up 85% of raw material inputs. He emphasized that transitioning from Original Equipment Manufacturing (OEM) to Own Brand Manufacturing (OBM) is critical to increasing export value. However, despite repeated encouragement from the government, progress in this transformation has remained limited.

Indonesia's Ministry of Trade (Kemendag) is supporting domestic exporters in response to the anti-dumping and countervailing duty investigations initiated by the U.S. Department of Commerce concerning hardwood plywood and decorative plywood exports.

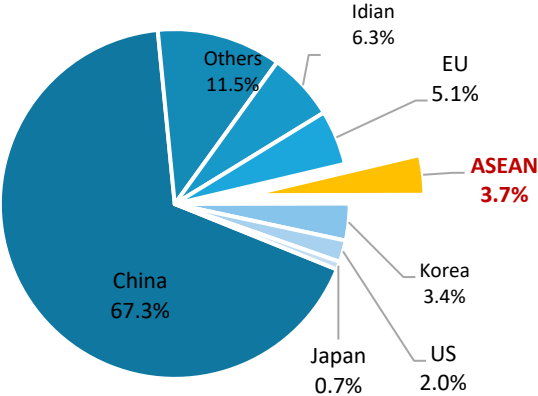
Kemendag is assisting affected companies in preparing defense documentation and completing the investigation questionnaires. Currently, approximately one-third of Indonesia's total production of hardwood and decorative plywood is exported to the United States, making this a critical issue for the sector.



Export volume and value to ASEAN, May-2025



Percentage of export value to ASEAN, May-2025



Export results to ASEAN, May-2025

VALUE

6.4 *Mil.USD*

↗ Increase **56%** compared to Apr-25

↗ Increase **44%** compared to May-24

↓ **2.5** *Mil.USD* less than the monthly average rate in 2024.

♦ Accumulated 5 month of 2025 reaches **50.1** *tr.USD.*, and the rate is **47%** of the total in 2024.

VOLUME

4.02 *thousand tons*

↗ Increase **85%** compared to Apr-25

↗ Increase **62%** compared to May-24

↓ **1.4** *thousand tons* less than the monthly average rate in 2024.

♦ Accumulated 5 month of 2025 reaches **28.3** *thousand tons.*, and the rate is **44%** of the total in 2024.

Changes in percentage of export value to ASEAN, May-2025

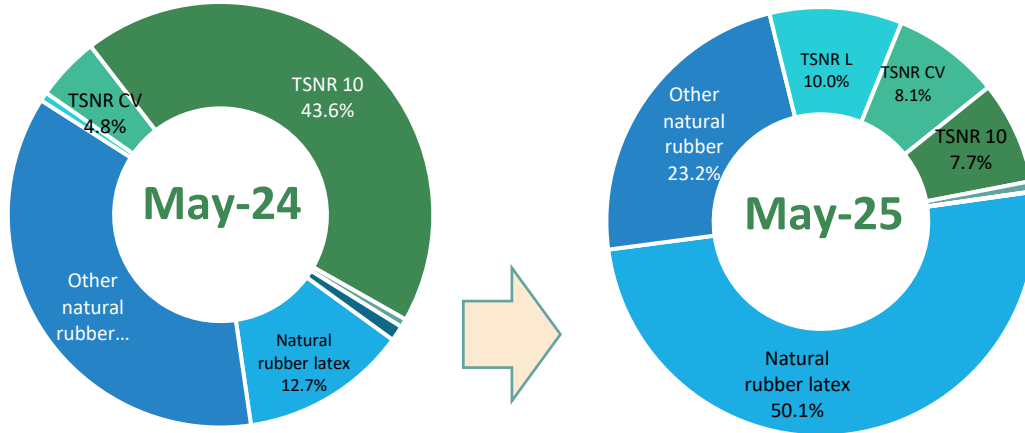


Source: Calculated from data of the Department of Customs

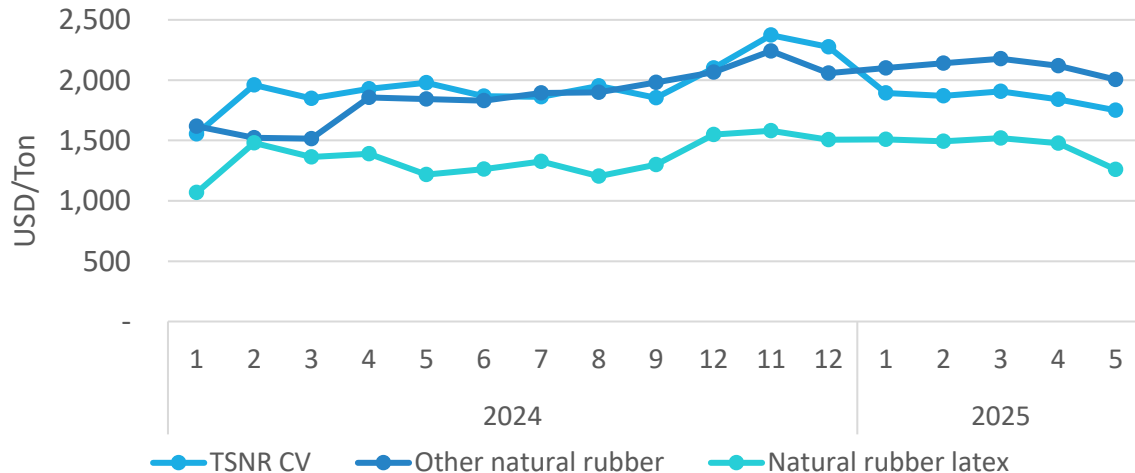


RUBBER

Structure of exports by products to ASEAN, May-2025



Average export price to ASEAN, May-2025



Export results to ASEAN, May-2025



Other natural rubber

Value: **0.5** Mil.USD

Increase **196%** compared to Apr-25

Decrease **82%** compared to May-24



TSNR 10

Value: **1.5** Mil.USD

Decrease **9%** compared to Apr-25

Decrease **33%** compared to May-24



Natural rubber latex

Value: **3.2** Mil.USD

Increase **62%** compared to Apr-25

Increase **311%** compared to May-24

Other natural rubber

The average export price in May-25 is **2.005** USD/ton; Decrease **5.4%** compared to the previous month; and Increase **8.8%** compared to the same month in 2024.

TSNR 10

The average export price in May-25 is **1.705** USD/ton; Decrease **5.0%** compared to the previous month; and Increase **10.4%** compared to the same month in 2024.

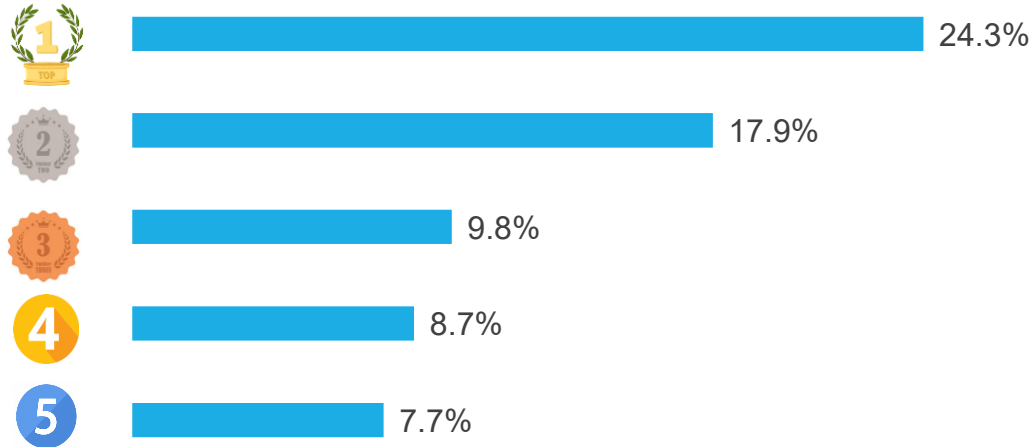
Natural rubber latex

The average export price in May-25 is **1.261** USD/ton; Decrease **15%** compared to the previous month; and Increase **3.6%** compared to the same month in 2024.

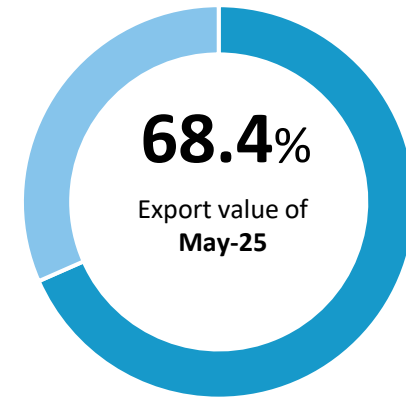


RUBBER

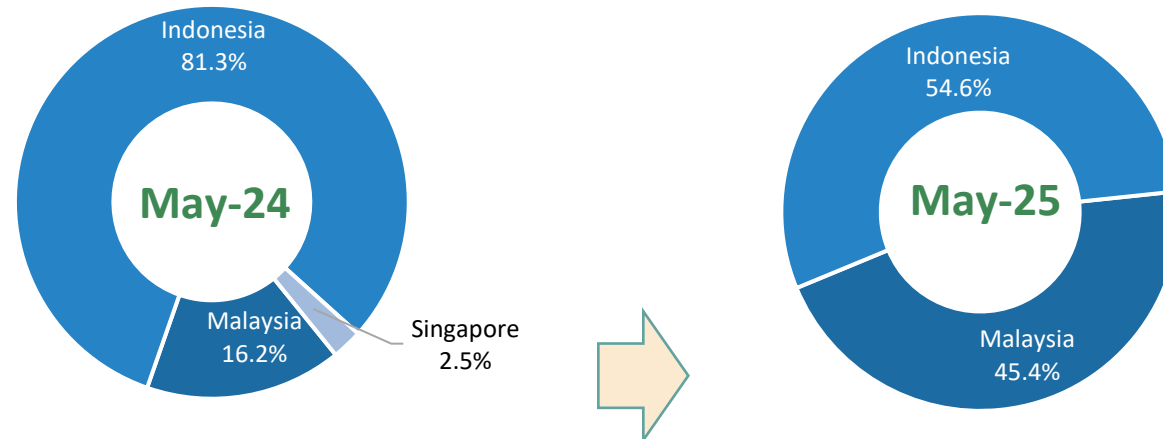
TOP 5 export enterprises by value to ASEAN, May-2025



Value ratio of TOP 5 export enterprises to ASEAN, May-2025



Fluctuations in the proportion of Vietnam's rubber exports to some ASEAN countries, May-2025





RUBBER

SPOTLIGHT

❖ **Thailand: Aiming to become a hub for rubber production, trade and innovation**

On the occasion of the 10th anniversary, the Rubber Authority of Thailand (GYTA) announced a new strategy for comprehensive rubber system management, aiming to become a global hub for rubber production, trade, and innovation.

As part of this strategy, GYTA is promoting the development of high value-added rubber products, such as the "Greenenergy Tyre", enhancing efforts to combat rubber smuggling, and establishing a national rubber reference price to reclaim pricing power. The agency is also supporting farmers, businesses, and research institutes throughout the value chain and promoting traceability standards aligned with EU regulations.

Thailand is currently the only Southeast Asian country with a fully implemented system for sustainable rubber quality and origin control, giving it a significant competitive edge in the global market. GYTA is confident that its comprehensive innovation strategy will help Thailand maintain its position as a leading global rubber producer.





RUBBER

SPOTLIGHT

❖ Laos expands rubber plantations to support local people livelihoods

The provincial government of Bokeo, northern Laos, approved a 30-year cooperation agreement with a rubber processing factory to develop rubber plantations covering 5,000 hectares in Paktha District. The factory will provide seedlings, technical training, and collaborate with local farmers in land development, thereby contributing to green space expansion and rural livelihood improvement.

This rubber planting initiative in Laos aims to promote sustainable socio-economic development, environmental protection, and poverty alleviation. It is part of a broader strategy to expand industrial forest areas, increase green coverage, and support agriculture as a long-term livelihood for rural communities.

Source: news.cn





RUBBER

SPOTLIGHT

❖ Malaysia's natural rubber output to fall sharply in April 2025

According to the Department of Statistics Malaysia (DOSM), in April 2025, natural rubber production recorded a significant decline of 37.3%, with export volume of 18,008 tons compared to the previous month.

Similarly, natural rubber exports was 35,901 tons in April, falling by 31.7%. China remained the largest export destination, accounting for 33.3% of Malaysia's total natural rubber exports, followed by the United Arab Emirates (14.9%), Germany (14.2%), India (6.5%), and the United States (5.1%).

The sharp decline in both production and exports indicates that Malaysia's rubber industry is facing many challenges in terms of output and trade. Market analysts emphasize that demand recovery in major export markets and price stabilization will be key factors to monitor in the coming months.

Source: [businesstoday.com.my](https://www.businesstoday.com.my)





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, May-2025



Export results to ASEAN, May-2025

VALUE



1.07

Mil.USD

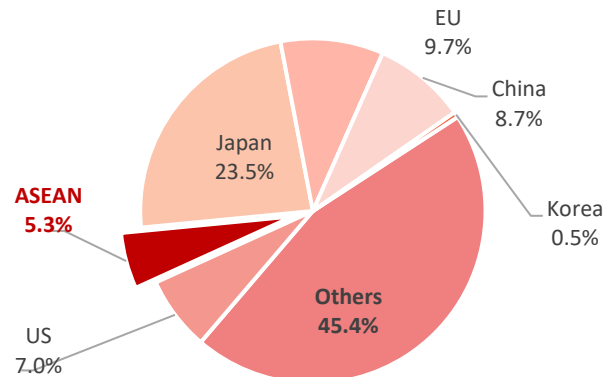
Decrease **43%** compared to Apr-25

Increase **21.8%** compared to May-24

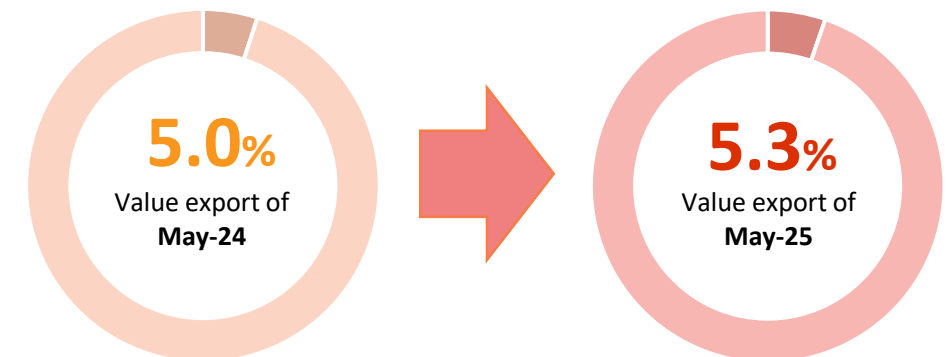
Decrease **3.1 Mil.USD** less than the monthly average rate in 2024.

Accumulated 5 month of 2025 reaches **18.3 Mil.USD**, and the rate is **36.6%** of the total in 2024.

Percentage of export value to ASEAN, May-2025



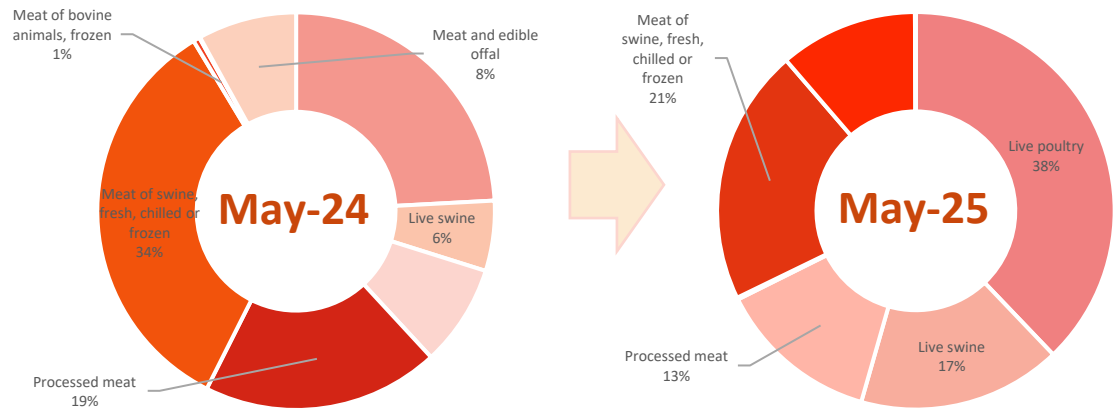
Changes in percentage of export value to ASEAN, May-2025





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, May-2025



Export results to ASEAN, May-2025

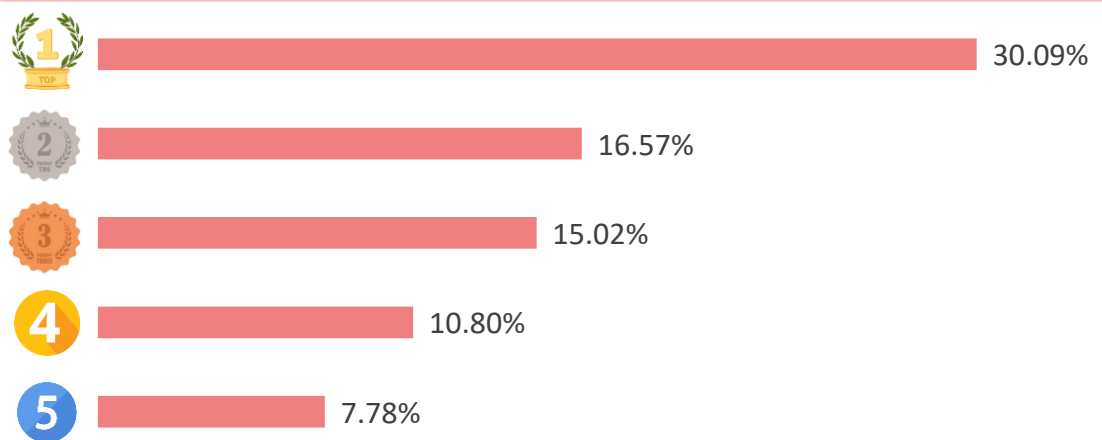


Meat of swine, fresh, chilled or frozen
Value: **223.6** Mil.USD
Increase **113** time compared to Apr-25
Decrease **25.1%** compared to May-24

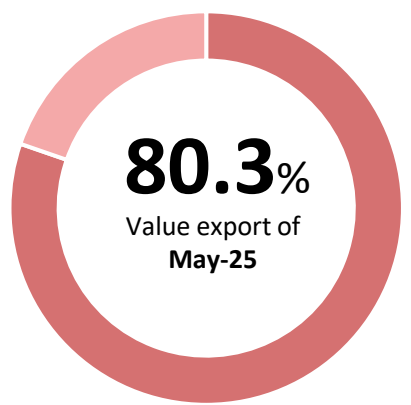


Live poultry
Value: **405.5** thousand USD
Decrease **3.6%** compared to Apr-25
Increase **91%** compared to May-24

Percentage of export value to ASEAN, May-2025



Changes in percentage of export value to ASEAN, May-2025

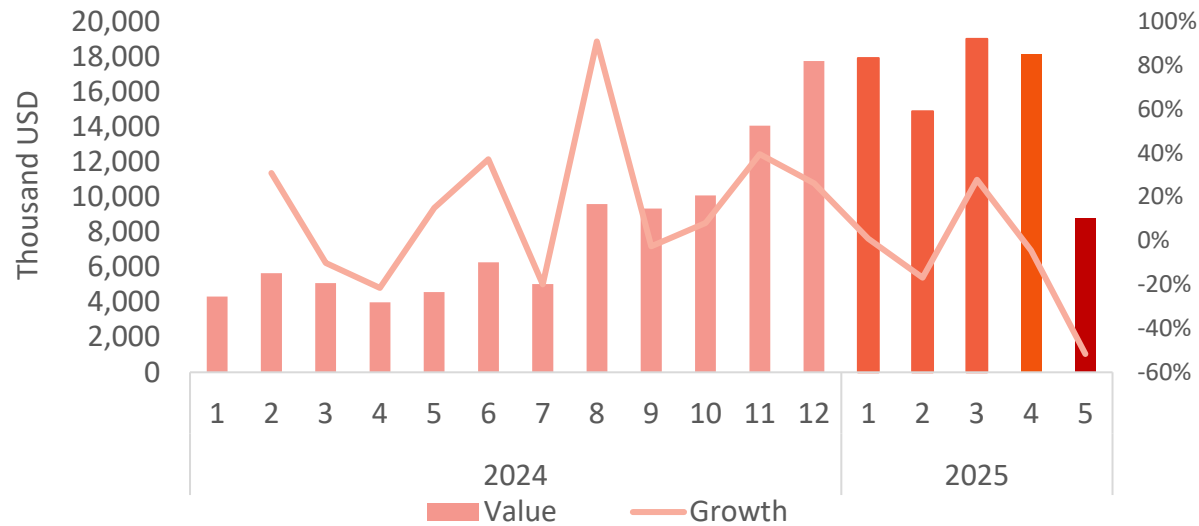


Source: Calculated from data of the Department of Customs



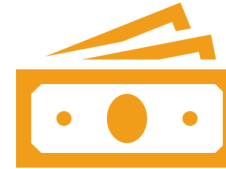
MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, May-2025



Import results to ASEAN, May-2025

VALUE



8.77

Mil.USD

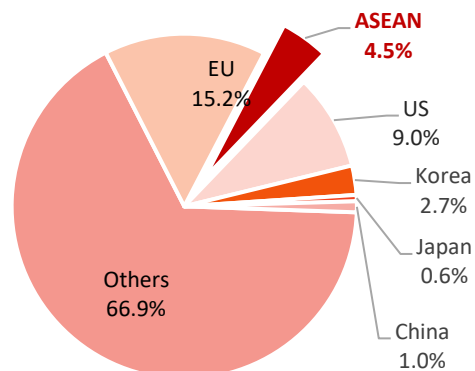
Decrease **52%** compared to Apr-25

Increase **91.6%** compared to May-24

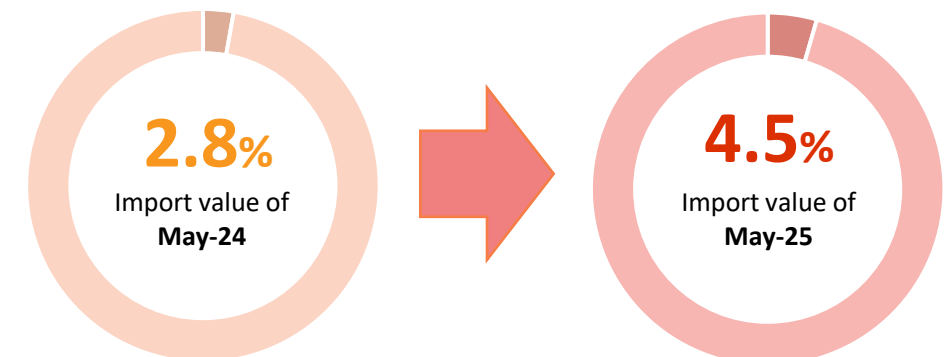
796.2 thousand USD more than the monthly average rate in 2024.

Accumulated 5 month of 2025 reaches **78.696 Mil.USD**, and the rate is **82.2%** of the total in 2024.

Percentage of import value to ASEAN, May-2025



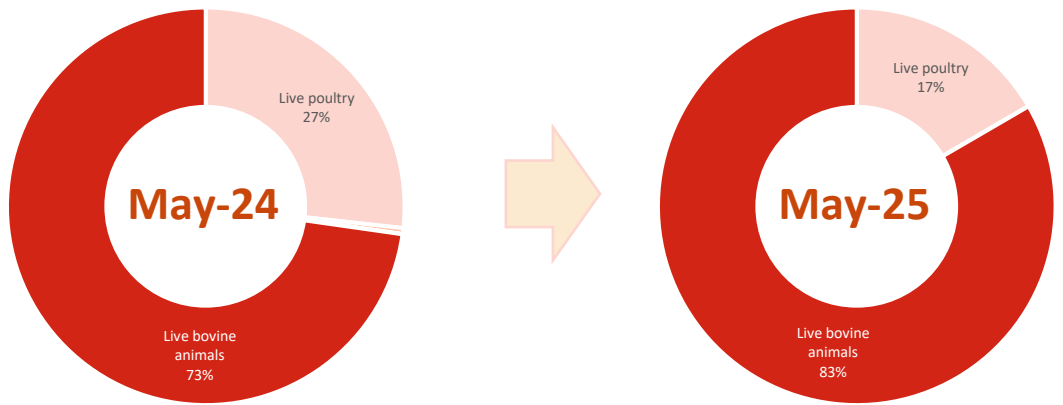
Changes in percentage of import value to ASEAN, May-2025





MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, May-2025



Import results to ASEAN, May-2025



Live bovine animals

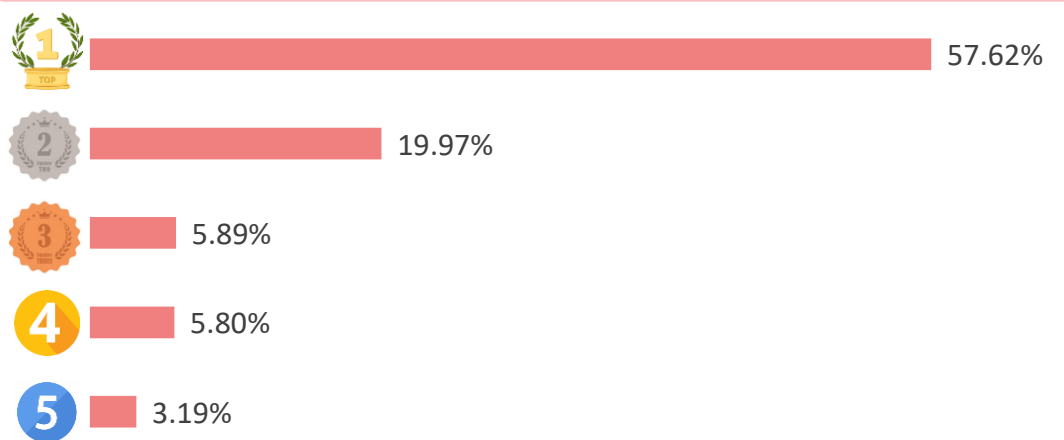
Value: **7.313** Mil.USD
Decrease **56.4%** compared to Apr-25
Increase **120%** compared to May-24



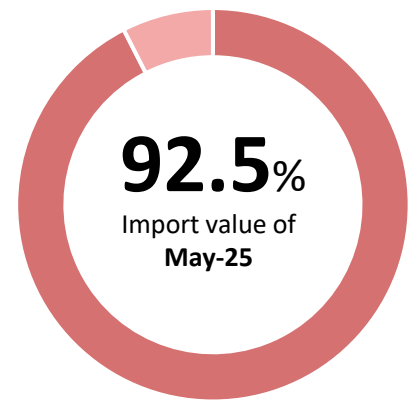
Live poultr

Value: **1.454** Mil.USD
Increase **17.2%** compared to Apr-25
Increase **18.8%** compared to May-24

Percentage of import value to ASEAN, May-2025



Changes in percentage of import value to ASEAN, May-2025





MEAT & MEAT PRODUCTS

SPOTLIGHT



On June 2, 2025, Mayor Alfredo Abelardo Benitez issued Executive Order No. 11-2025, officially declaring that Bacolod City is free from African Swine Fever (ASF). The city was reclassified by the Department of Agriculture – Western Visayas from a "red zone" (infected area) to a "pink zone" (buffer area) after meeting the national recovery standards outlined in the ASF guidelines. As of May 16, Bacolod is among 498 localities nationwide upgraded under the National ASF Prevention and Control Program.

Previously, in mid-2023, Bacolod reported its first four ASF cases, which devastated backyard swine herds, with 842 households reporting pig deaths. In response, Mayor Benitez lifted the ban on the entry of live pigs and pork products in May 2024 to meet local consumption needs and support the revitalization of the local swine sector.

Source: 3tres3.com





For feedback, please send to:

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(AGREINFOS)**

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