

Volume 8/2025



**ISPAE**

## MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

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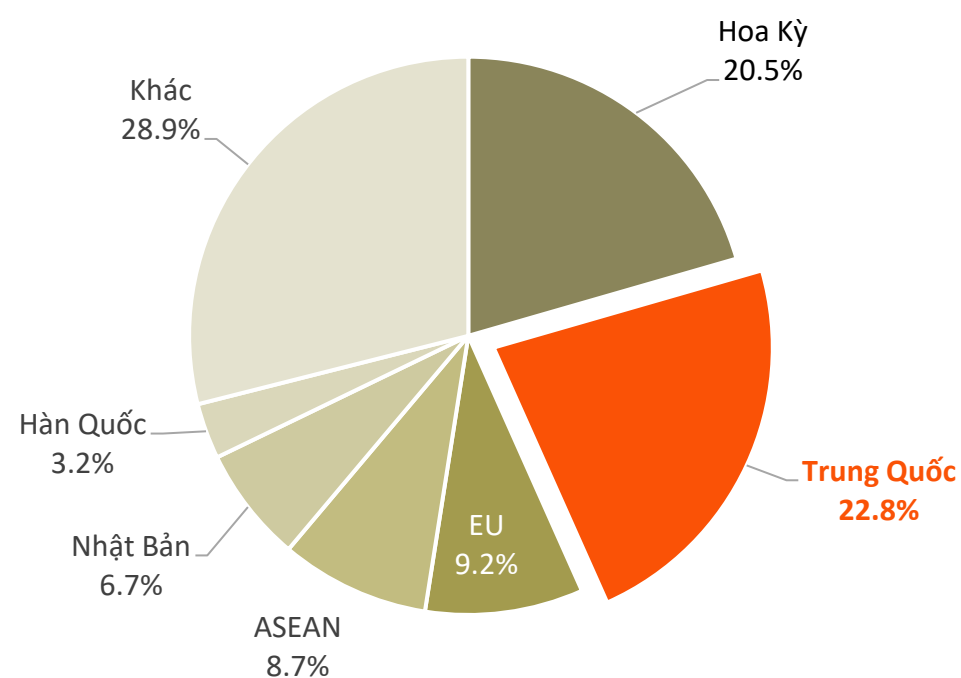
# FROM VIETNAM TO **ASEAN**

Prepared by: **AGREiNFOS**



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

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



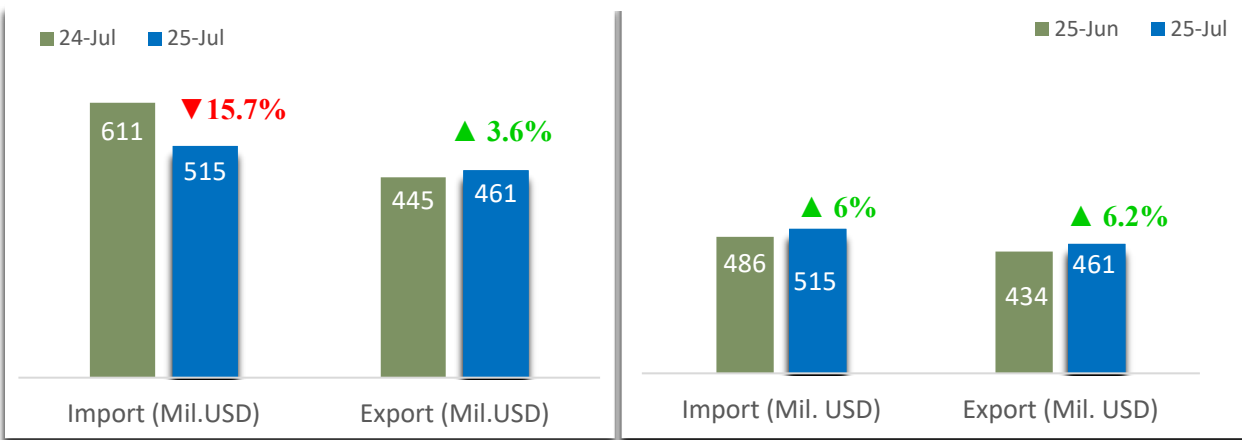
Changes in export proportion of AFF product to the ASEAN  
Jul-2025 compared to Jun-25 and Jul-24

	Export Value (Mil. USD)	Compared to Jun-25	Compared to Jul-24
US	1.222	▲ 0.3%	▼ 3.2%
China	1.356	▲ 0.1%	▲ 2.6%
EU	545	▼ 0.4%	▲ 1.3%
ASEAN	515	▲ 0.2%	▼ 2.9%
Japan	398	▼ 0.4%	▼ 0.2%
Korea	192	▼ 0.1%	▼ 0.5%
Total export	5.950		

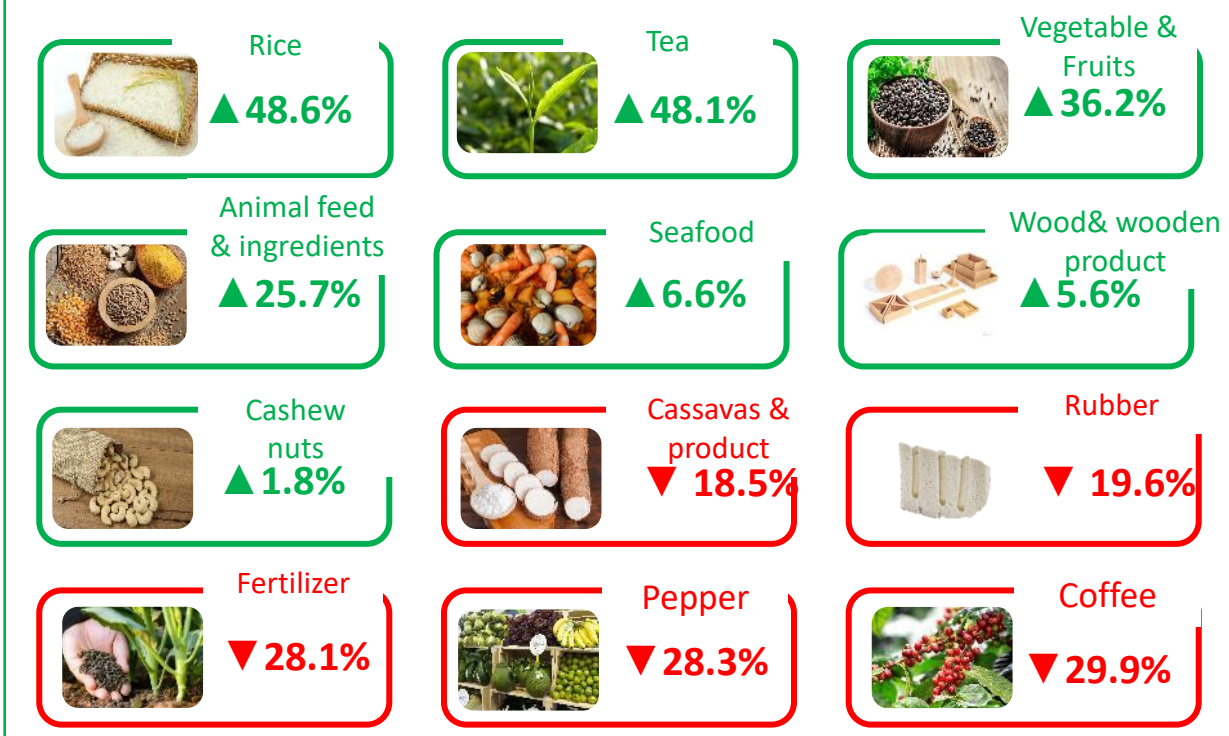
Source: Calculated from data of the Department of Customs

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

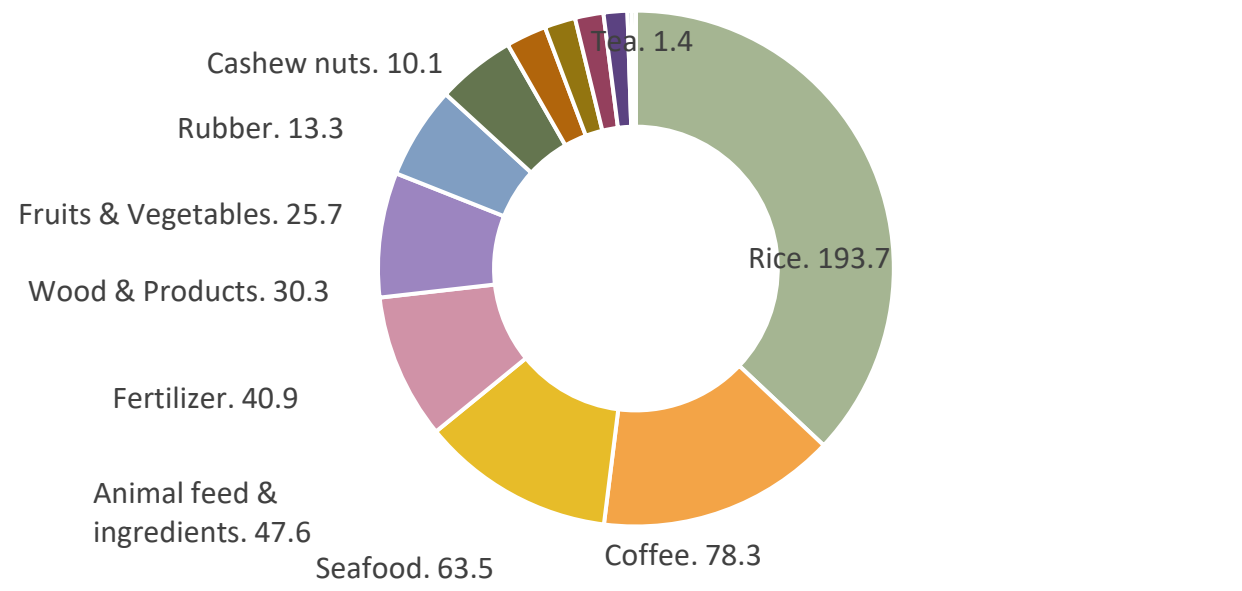
AFF product import-export turnover between  
Vietnam and ASEAN, Jul-2025



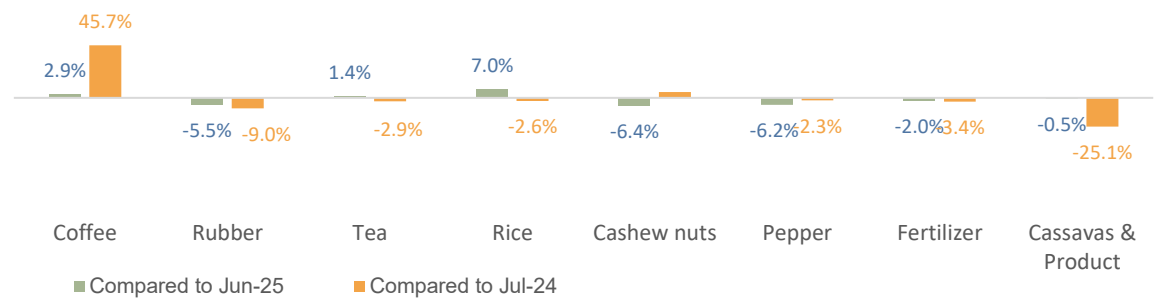
Changes in key AFF product export Value to  
ASEAN in Jul-2025 compared to Jun-2025



Key AFF product export Value to ASEAN, Jul-2025



Changes in average export Value of key AFF products  
to ASEAN in Jul-25 compared to Jul-24 and compared to Jun-25



Source: Calculated from data of the Department of Customs

Unit: Mil.USD



## Vietnam–ASEAN Trade Hits Record High, Surpassing USD 50 Billion in the First Seven Months of 2025

In the first seven months of 2025, total trade turnover between Vietnam and ASEAN reached USD 52.91 billion, representing a year-on-year (YoY) increase of 10.3% compared with the same period in 2024, and marking the highest level recorded during 2022–2025. Notably, six out of nine ASEAN member states reported positive growth in bilateral trade with Vietnam.

**Thailand** remained the Vietnam's largest trading partner in the region, with trade turnover of USD **12.29 billion, up 8% YoY**, following by **Indonesia** (USD 9.95 billion, +8.5% YoY) and **Malaysia** (USD 9.23 billion, +8% YoY). **Cambodia** reached USD 7.02 billion, a robust 16.3% YoY growth, while **Singapore** was USD 6.96 billion, increasing by 15.8% YoY. Particularly remarkable was the surge in Vietnam–Laos trade, which expanded by 79.3% YoY, from USD 1.1 billion in the same period of 2024 to USD 2 billion.

Conversely, other markets recorded declines, including the Philippines (USD 4.81 billion, –2% YoY), Myanmar (USD 317 million, –12.8% YoY), and Brunei (USD 298 million, –21.8% YoY).

**Exports:** Vietnam earned USD 4.84 billion from exports to **Thailand**, representing a 4.6% year-on-year (YoY) increase. The next major destinations were **Singapore** with USD 3.38 billion (+11.4% YoY) and the **Philippines** with USD 3.37 billion (–2.3% YoY). Exports to Laos recorded a remarkable surge of 112% YoY, reaching USD 755.2 million compared with USD 355 million in the same period of 2024. Myanmar accounted for USD 185.8 million (+4.4% YoY), while exports to Brunei amounted to only USD 54 million, down 37% YoY.

**Imports:** **Thailand** remained the largest source of imports with USD 7.45 billion (+10.3% YoY), followed by **Indonesia** (USD 6.6 billion, +16% YoY) and **Malaysia** (USD 6.21 billion, +13.1% YoY). **Cambodia and Singapore** both exceeded the USD 3 billion threshold, with turnover of USD 3.78 billion (+28% YoY) and USD 3.57 billion (+20.3% YoY), respectively. Other partners included the **Philippines** (USD 1.43 billion, –2% YoY) and **Laos** (USD 1.25 billion, +63% YoY). Meanwhile, imports from **Myanmar** reached only USD 131 million (–29% YoY), and **Brunei** USD 244 million (–17% YoY).



## ASEAN negotiates upgrading of ASEAN-India Trade in Goods Agreement



## ASEAN promotes Digital Economy Framework Agreement (DEFA)



## ASEAN negotiates upgrading of ASEAN-India Goods Trade Agreement

On 28 August 2025, the ASEAN Special Economic Ministers' Meeting on the negotiations to upgrade the ASEAN–India Trade in Goods Agreement (ATIGA) was organized virtually under the chair of the Minister of Investment, Trade and Industry of Malaysia, with the participation of ASEAN Economic Ministers and the ASEAN Deputy Secretary-General. At the meeting, the Committee in charge of reviewing ATIGA reported on the progress of negotiations, existing challenges, and proposals to accelerate the process. The parties reaffirmed their commitment to substantially conclude the negotiations within 2025, recognizing this as a priority initiative for economic cooperation under the current ASEAN Chairmanship.

Trade statistics indicate that ASEAN–India trade turnover reached USD 106.9 billion in 2024, representing a 6.05% increase over 2023. ASEAN exports to India about USD 70.8 billion (+7.6%), while import was USD 36.1 billion (+3.4%). Bilateral trade between Vietnam and India was USD 14.9 billion (+4.5%), comprising USD 9.06 billion in exports (+7.6%) and USD 5.83 billion in imports (–0.6%).

*Source: aseanvietnam.vn*

## ASEAN promotes Digital Economy Framework Agreement (DEFA)

On 28 August 2025, the Special Meeting of the ASEAN Economic Community Council was organized virtually to discuss the Digital Economy Framework Agreement (DEFA). Following 13 rounds of negotiations, the Ministers reached consensus on resolving outstanding issues to achieve objectives of finalising the negotiations by the end of 2025.

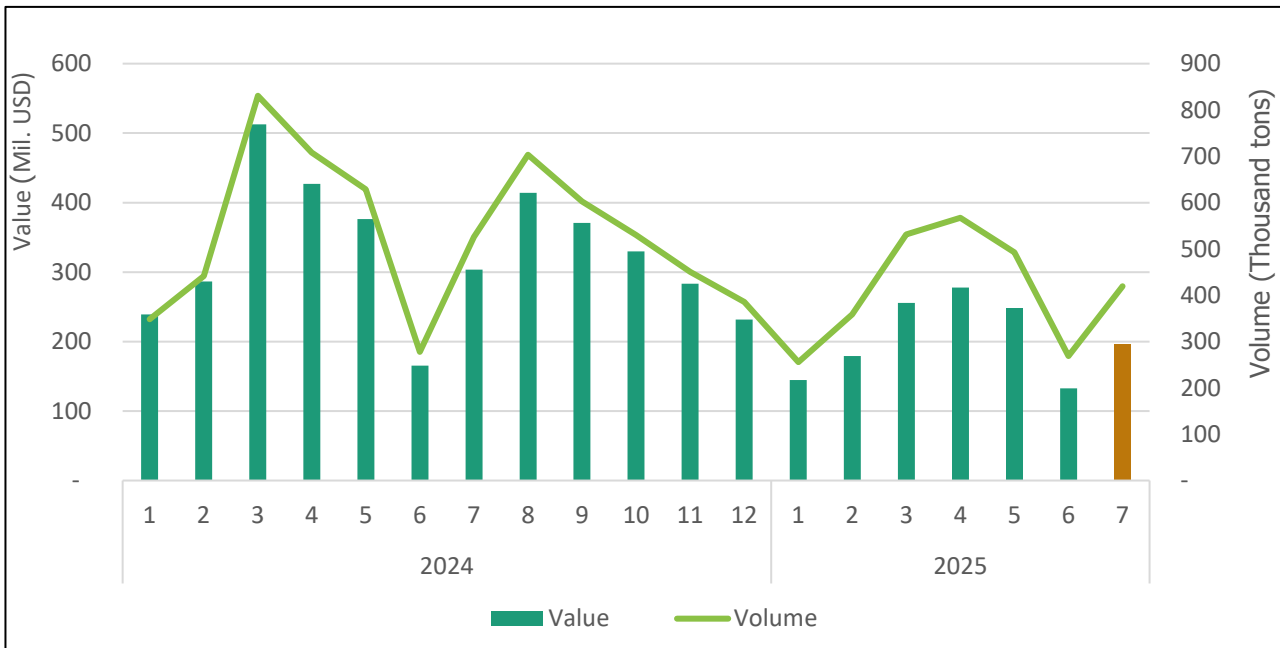
The agreement aims to establish a common, efficient, and interconnected digital market, thereby laying the foundation for fostering regional digital economic growth. The outcomes of the meeting reaffirmed ASEAN's political commitment and created favorable momentum for subsequent negotiation rounds, with a view to shaping a comprehensive digital cooperation framework that meets the demands of development and integration in the era of global digital transformation.

*Source: aecvcci.vn*

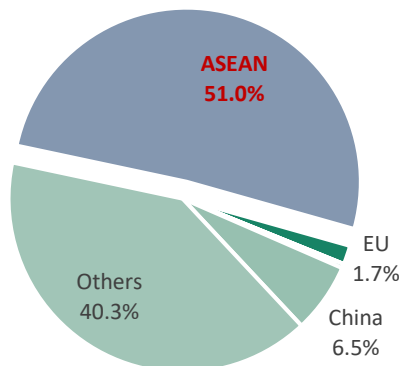


# RICE

## Export volume and Value to ASEAN, Jul-2025



## Percentage of export Value to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025

**VALUE**  
**195.9** Mil. USD

↗ Increase **47.7%** compared to Jun 25

↘ Decrease **35.5%** compared to Jul 24

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

◇ Accumulated 7 months of 2025 reaches **1.4 Bil.USD**, and the rate is **36.4%** of the total in 2024.

**VOLUME**  
**268.5** thousand tons

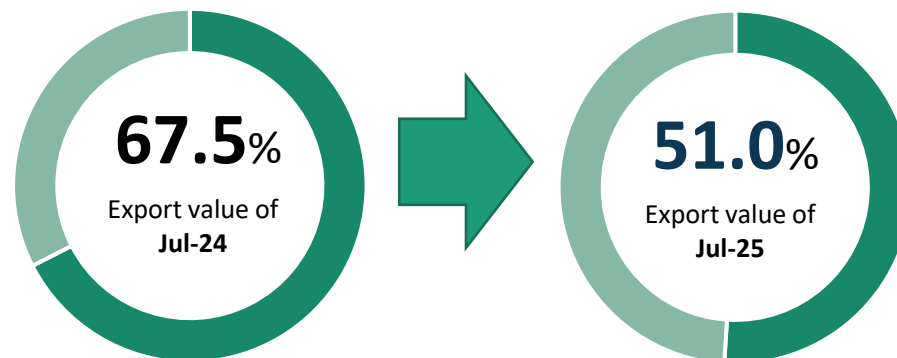
↗ Increase **56.2%** compared to Jun 25

↘ Decrease **20.2%** compared to Jul 24

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

◇ Accumulated 7 months of 2025 reaches **2.8 Mil. tons**, and the rate is **45.0%** of the total in 2024

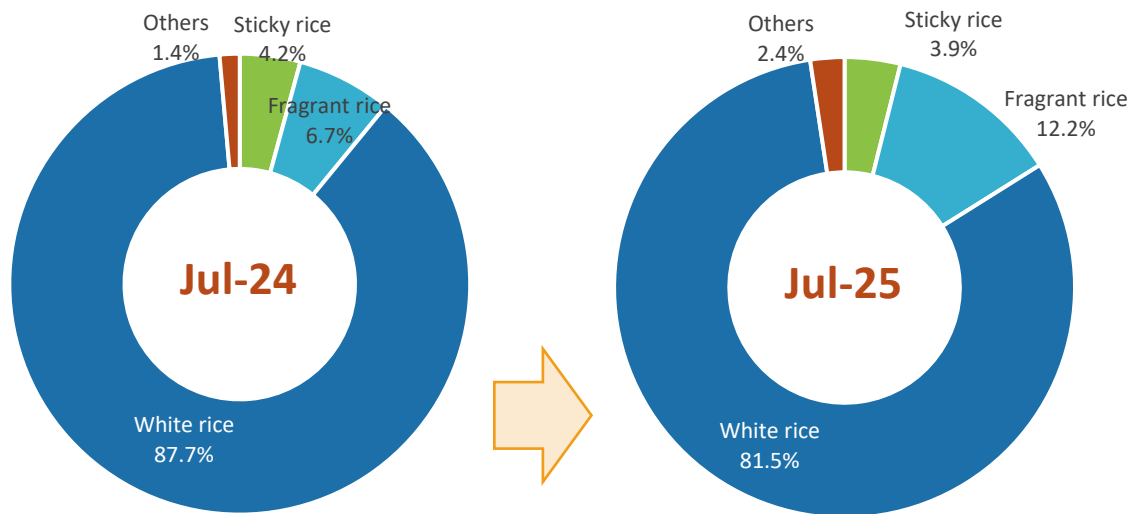
## Changes in the percentage of export Value to ASEAN, Jul-2025



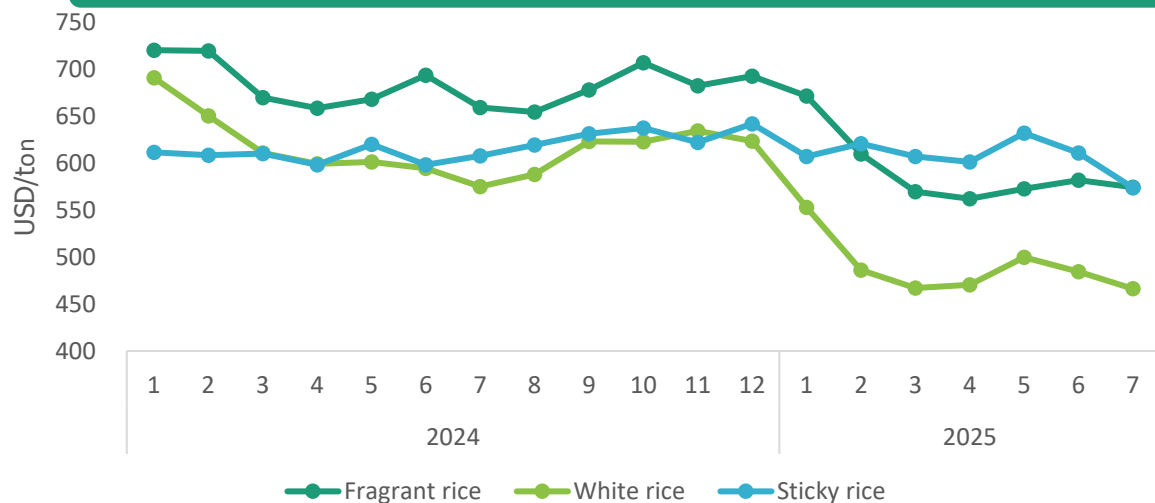


# RICE

## Structure of exports by products to ASEAN, Jul-2025



## Average export price to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025



### White rice

Value: **159.7** Mil. USD  
Increase **58%** Compared to Jun 25  
Decrease **40%** compared to Jul 24



### Fragrant Rice

Value: **23.8** Mil. USD  
Increase **17%** Compared to Jun 25  
Increase **17%** compared to Jul 24



### Sticky Rice

Value: **7.6** Mil. USD  
Increase **30%** Compared to Jun 25  
Decrease **41%** compared to Jul 24

### Sticky rice

The average export price in Jul-25 is **574** USD/ton; **Decrease 6%** compared to the previous month; and **Decrease 6%** compared to the same month in 2024.

### Fragrant rice

The average export price in Jul-25 is **574** USD/ton; **Decrease 1%** compared to the previous month; and **Decrease 13%** compared to the same month in 2024.

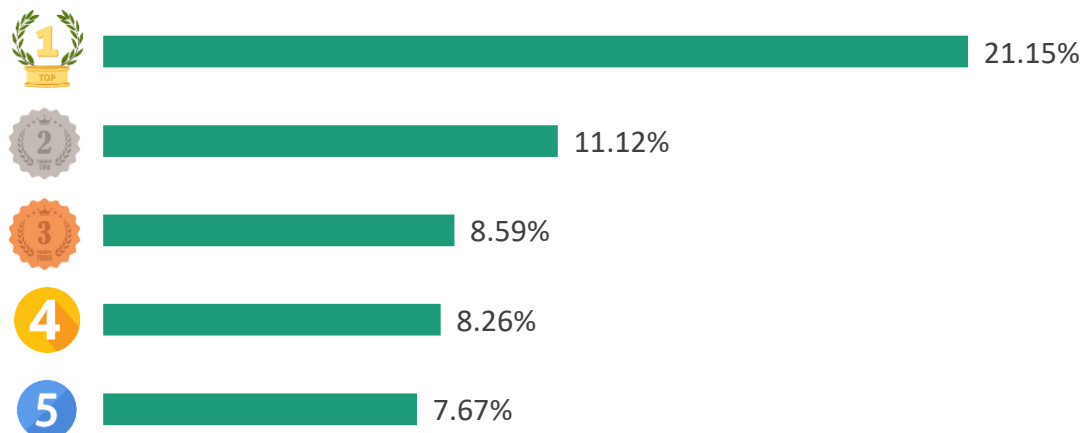
### White rice

The average export price in Jul-25 is **466** USD/ton; **Decrease 4%** compared to the previous month; and **Decrease 19%** compared to the same month in 2024.

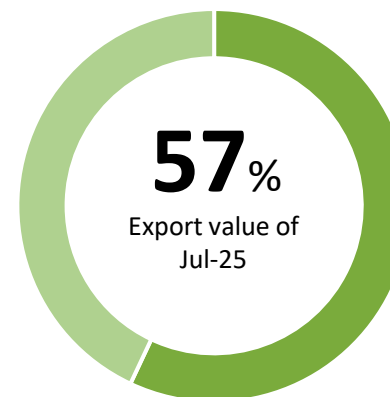


# RICE

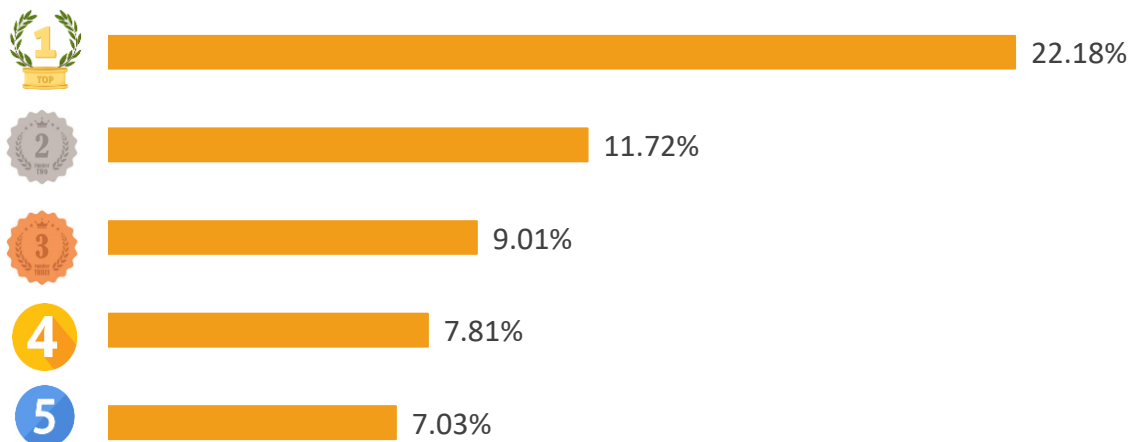
## Top 5 export enterprises by Value to ASEAN, Jul-2025



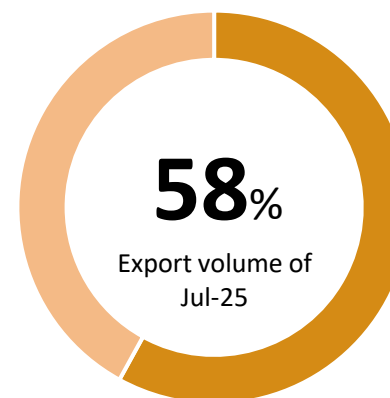
## Value ratio of Top 5 export enterprise to ASEAN, Jul-2025



## Top 5 export enterprises by volume to ASEAN, Jul-2025



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







# RICE

## ĐIỂM TIN THỊ TRƯỜNG LÚA GẠO ASEAN

01



On 29 August 2025, the President of the Philippines issued Executive Order No. 93 (EO 93), stipulating a 60-day suspension of importing regular-milled and well-milled rice from 1 September to 30 October 2025. The ban applies to all markets, with the exception of specialty rice varieties that are less common in domestic production. The ban duration may be shortened or extended upon the recommendation of the inter-ministerial body, while relevant agencies are responsible for issuing detailed implementation guidelines.

This decision was introduced to support farmers during the peak harvest season, facilitate the absorption of domestic supply, and stabilize rice prices. According to the USDA, in the first half of 2025, the Philippines' rice output increased by more than 6% year-on-year. In addition, the relaxation of India's export restrictions has driven down the price of imported rice, exerting significant pressure on domestic procurement prices.

*Source: Lawphil; Philippine Information Agency;*

*USDA; S&P Global*





# RICE

## SPOTLIGHT

02

The Government of Thailand approved a large-scale support package worth THB 114 billion (USD 3.1 billion) to assist rice farmers facing declining prices. The package is divided into two main programs: direct financial aid and price stabilization measures.

Under the direct aid scheme, each farming household will receive THB 1,000 per rai (approximately USD 170 per hectare), applicable for up to 10 rai (1.6 hectares) of cultivated land. The Thai Cabinet granted a special exemption to override its previous resolution prohibiting direct subsidies for agricultural products.

With a budget of THB 61.6 billion (USD 1.68 billion), the second program focuses on price stabilization for the 2025/2026 crop year, including credit provision, purchasing loans, and interest subsidies for traders.

For direct financial aid, budget allocations are as follows: THB 7.28 billion (USD 198 million) for the 2025 off-season crop, expected to benefit 861,000 households, and THB 37.9 billion (USD 1.03 billion) for the main 2025/2026 crop.

*Source: bangkokpost.com*

03

According to President Prabowo Subianto, Indonesia has officially resumed rice exports, marking a significant achievement attributed to food security programs implemented over the past ten months. As of August 2025, the country not only achieved self-sufficiency in staple food production but also recorded a historic high in national rice reserves, surpassing 4 million tons.

In addition to boosting production, the Indonesian government has pursued direct intervention policies to protect both farmers and consumers. Specifically, the farm-gate procurement price for paddy has been raised to IDR 6,500 per kilogram (USD 0.40/kg), ensuring substantial profit margins for farmers. At the same time, the President reaffirmed his commitment to act decisively against trade fraud and market manipulation.

*Source: en.tempo.co*





# FRUITS AND VEGETABLES (EXPORT)

## Export value to the ASEAN, Jul-25



## Export results to the ASEAN, Jul-25

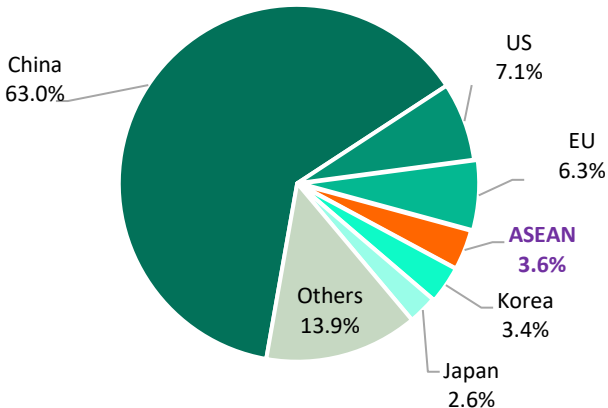
VALUE  
**27.8**  
Mil. USD

Increase **32.1%** compared to Jun 25

Decrease **29.7%** compared to Jul 24  
**8.6 Mil. USD** less than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **198.4 Mil. USD**, and the rate is **45.4%** of the total in 2024.

## Percentage of export value to the ASEAN, Jul-25



## Changes in percentage of export value to the ASEAN, Jul-25

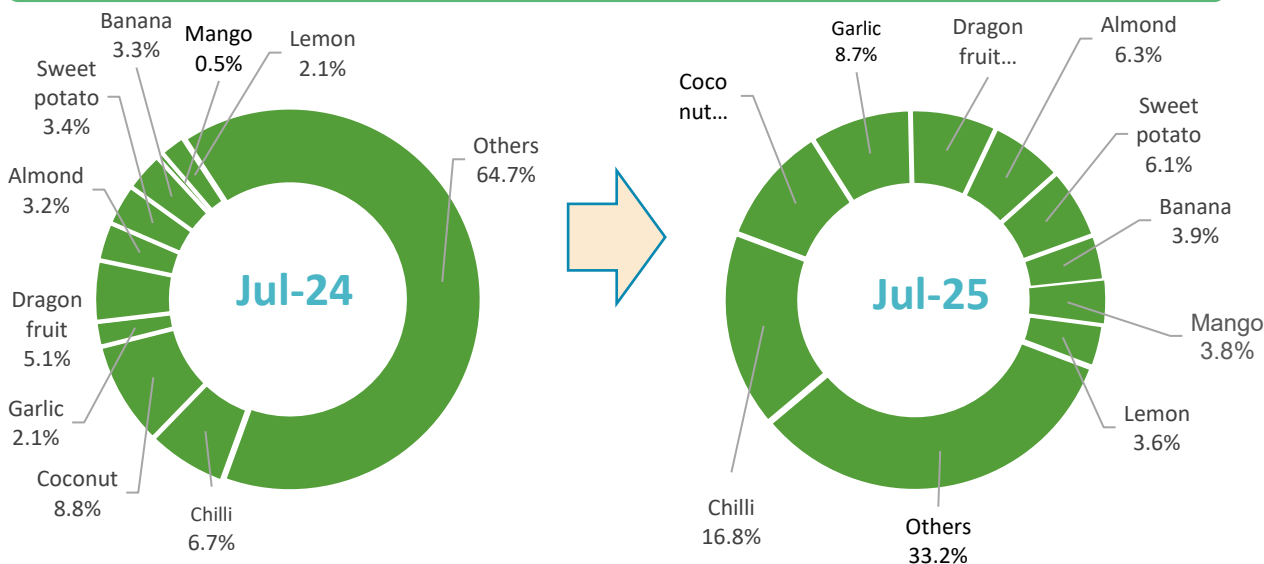


Source: Calculated from data of the Department of Customs



# FRUITS AND VEGETABLES (EXPORT)

## Structure of exports by products to the ASEAN, Jul-25



## Export results to the ASEAN, Jul-25



### Chillis

Value: **4.7** Mil. USD

Increase **5.8%** compared to Jun 25

Increase **76.3%** compared to Jul 24



### Coconuts

Value: **2.9** Mil. USD

Increase **212.7%** compared to Jul 25

Decrease **17.9%** compared to Jul 24



### Garlic

Value: **2.4** Mil. USD

Increase **57.2%** compared to Jun 25

Increase **195.0%** compared to Jul 24



### Dragon Fruit

Value: **2.1** Mil. USD

Increase **49.9%** compared to Jun 25

Increase **1.2%** compared to Jul 24



### Almond

Value: **1.8** Mil. USD

Decrease **3.6%** compared to Jun 25

Increase **38.5%** compared to Jul 24



### Sweet potato

Value: **1.7** Mil. USD

Increase **40.4%** compared to Jun 25

Increase **24.3%** compared to Jul 24



### Banana

Value: **1.1** Mil. USD

Increase **5.5%** compared to Jun 25

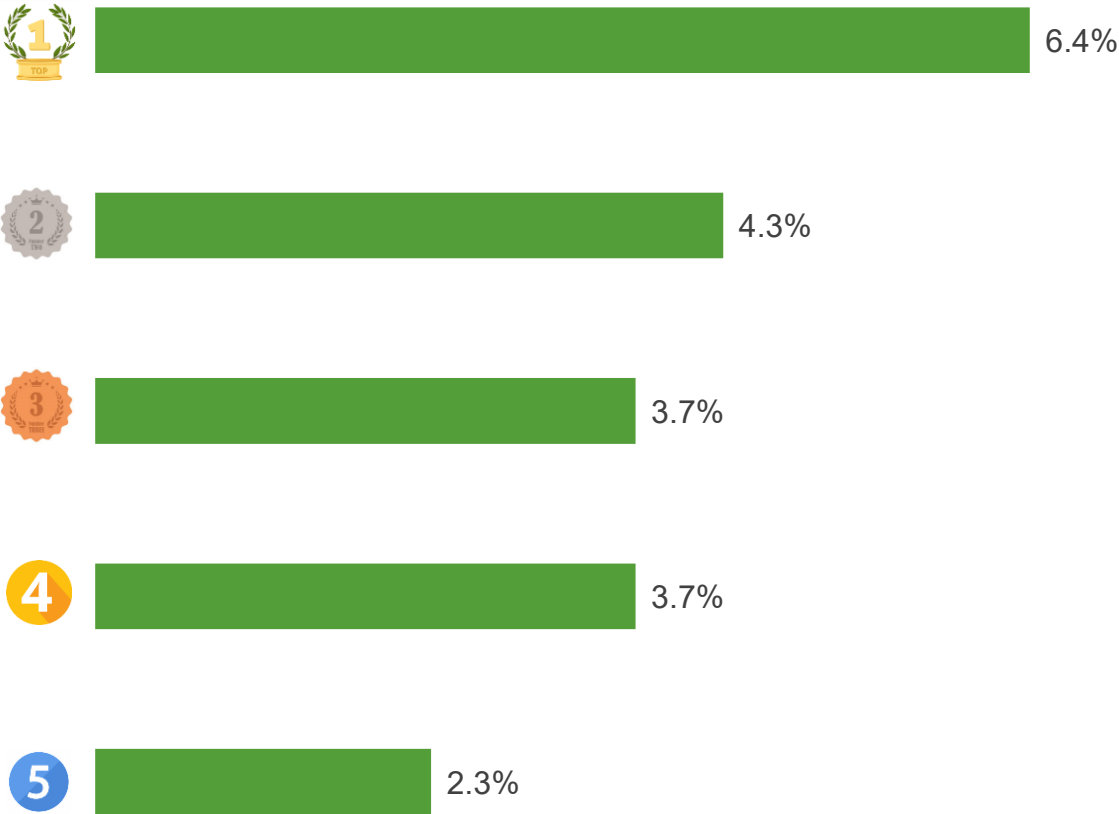
Decrease **16.2%** compared to Jul 24



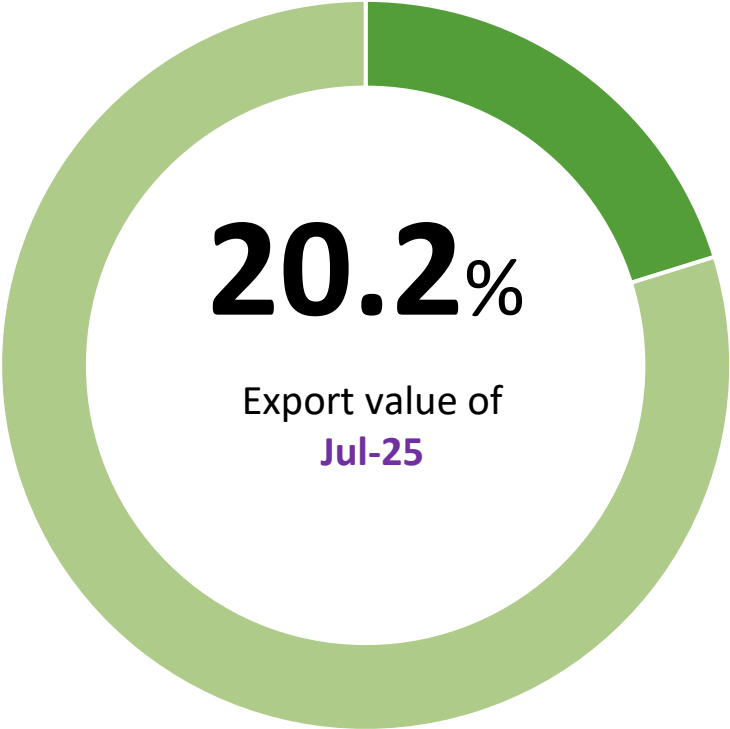


# FRUITS AND VEGETABLES (EXPORT)

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



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



Source: Calculated from data of the Department of Customs



# FRUITS AND VEGETABLES (IMPORT)

## Import value to the ASEAN, Jul-2025



## Import results to the ASEAN, Jul-2025

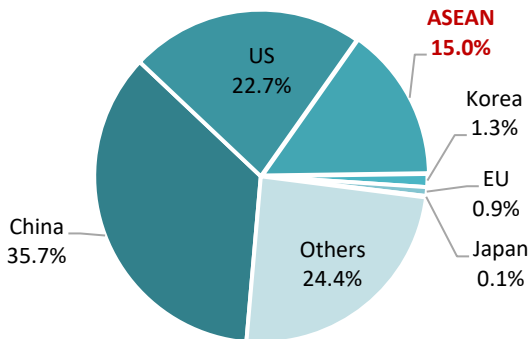


Decrease **14.2%** compared to Jun 25

Increase **44.7%** compared to Jul 24  
**11.5 Mil. USD** more than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **234.3 Mil. USD**, and the rate is **75.8%** of the total in 2024.

## Percentage of import value to the ASEAN, Jul-2025



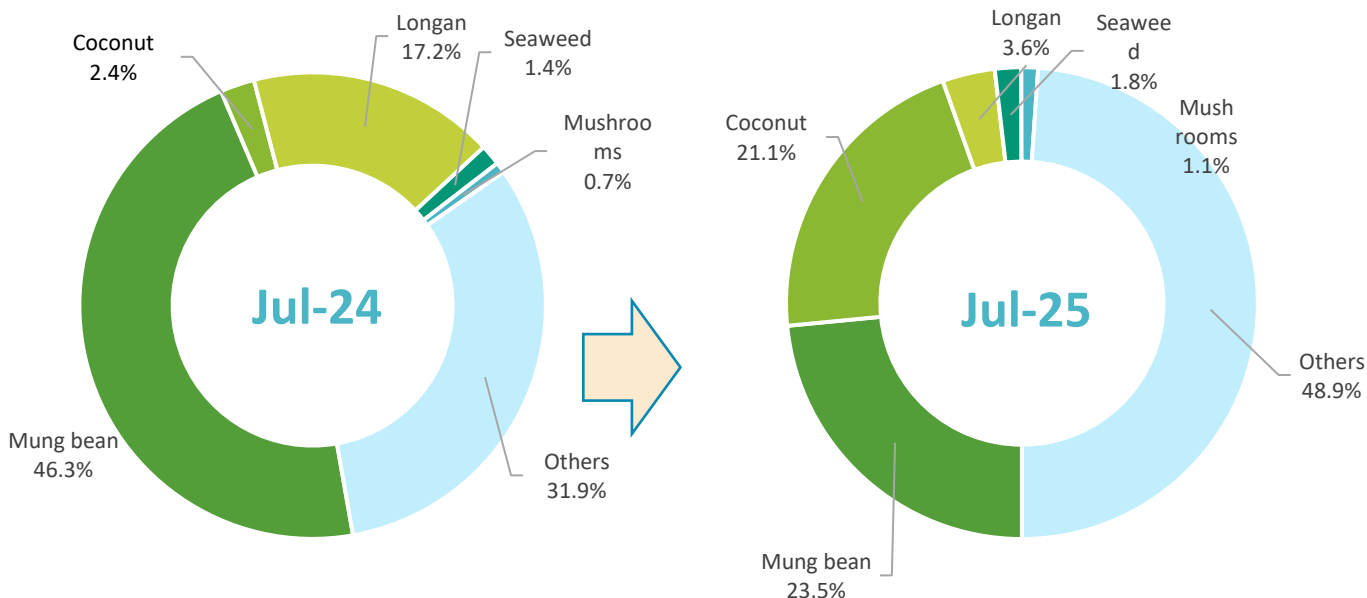
## Changes in percentage of import value to the ASEAN, Jul-2025





# FRUITS AND VEGETABLES (IMPORT)

## Structure of imports by products from the ASEAN, Jul-2025



### Longan

Value: **1.3** Mil. USD

Cao gấp **15.3** times compared to Jun 25

Decrease **69.7%** compared to Jul 24



### Seaweed

Value: **0.67** Mil. USD

Increase **44.1%** compared to Jun 25

Increase **81.6%** compared to Jul 24



### Mung bean

Value: **8.7** Mil. USD

Decrease **33.3%** compared to Jun 25

Decrease **26.7%** compared to Jul 24



### Coconuts

Value: **7.9** Mil. USD

Decrease **18.0%** compared to Jun 25

Cao gấp **12.8** times compared to Jul 24



### Mushrooms

Value: **0.43** Mil. USD

Increase **153.0%** compared to Jun 25

Increase **123.8%** compared to Jul 24



### **Thailand will open more ports to import and export fruits with China.**

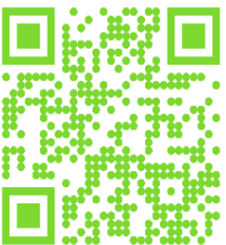
Thailand and China have cooperated to open five additional fruit import–export ports starting 1 September 2025 to expand transport routes, ease congestion at existing border gates, and boost the distribution of Thai fruits—valued at over THB 180 billion (approximately USD 5.55 billion)—to multiple provinces across China. Specifically, three new checkpoints have been added in Thailand: Thung Chang (Nan Province), Ban Huak (Phayao Province), and Phu Du (Uttaradit Province). On the Chinese side, two new checkpoints were introduced: Mengkang and Ta Luo in Yunnan Province. This expansion brings the total to nine border checkpoints in Thailand and twelve in China. The opening of these additional ports is expected to enhance transport flexibility, lower logistics costs, reduce seasonal congestion, and strengthen the competitiveness of Thai fruits in the Chinese market.

*Source: Vietnamplus.vn*

### **Cambodia exports fresh durian to China by air for first time**

According to the Khmer Times, Cambodia exported its first shipment of two tons fresh durians to Henan Province, China by air on 8 August 2025. The consignment, transported from an airport in Cambodia to Zhengzhou Xinzheng International Airport in Henan, took only four hours. This means that durians can now be delivered from Cambodian farms to Chinese consumers within 48 hours. In July 2025, Cambodia officially received authorization from the General Administration of Customs of China (GACC) to commence direct exports of fresh durians to China, following the signing of an agreement in April.

*Source: Guojiguoshu.com*







### **Laos strengthens competitiveness of durian industry**

Laos is seeking to enhance its position in the durian industry by announcing a plan to supply approximately 400 tons of high-quality durians to both domestic and international markets in 2026. At present, the country has 269 hectares under durian cultivation with nearly 19,000 trees, of which more than 3,300 trees begun to have fruits.

The Lao government and enterprises are placing strong emphasis on cultivation techniques, orchard management, pest and disease control, and product processing, while simultaneously working to standardize certification and declaration procedures in support of future exports.

*Source: Cafef.vn*

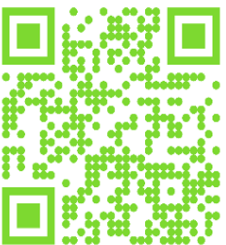
### **Perak Durian - Malaysia exports durian to more than 40 countries**

Perak has emerged as one of Malaysia's leading durian-producing states, with output in 2024 exceeding 59,217 tons, valued at approximately MYR 462.28 million (USD 110 million). Between 2017 and 2023, Perak durians were exported to more than 40 countries, with 73% of export value concentrated in China.

By 2030, Malaysia's durian export value will reach MYR 1.8 billion (USD 426 million), supported by improvements in logistics and cold-chain systems. In addition to China, Perak durians are highly sought after in Singapore, Hong Kong, the United States, and Australia, with prices for Musang King reaching as high as MYR 400 per 2.5 kg (USD 94.6/2.5 kg).

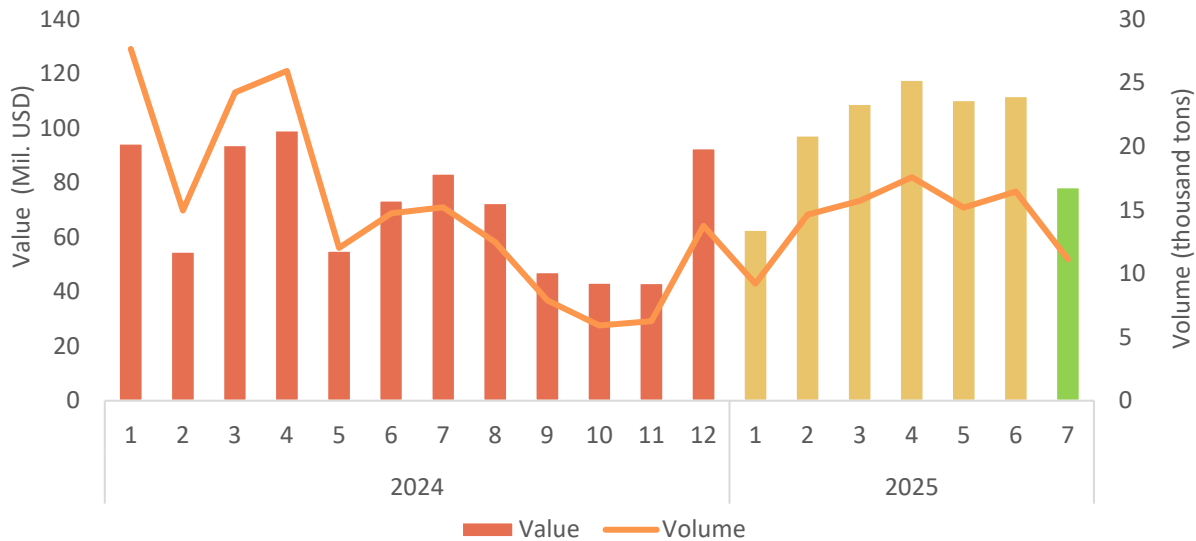
A wide range of durian-based processed products—including durian chocolate, durian coffee, durian cakes, and durian ice cream—are also being introduced to international markets.

*Source: Vietnambiz.vn*

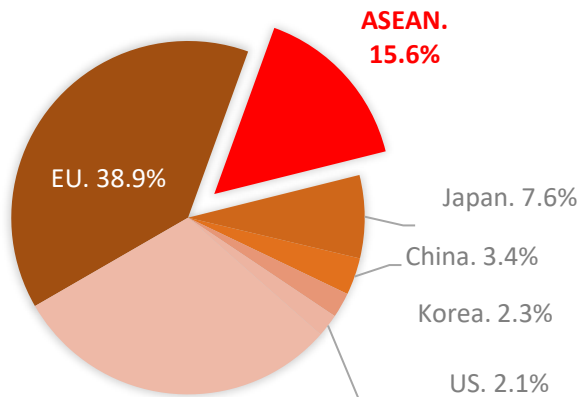


# COFFEE

## Export volume and value to ASEAN, Jul-2025



## Percentage of export value to ASEAN Jul-2025



## Export results to ASEAN Jul-2025

### VALUE

**78.3** Mil. USD

⬇️ Decrease **29.9%** compared to Jun 25

⬇️ Decrease **6%** compared to Jul 24

⬆️ **7.3** Mil. USD more than the monthly average rate in 2024.

☐ Accumulated 7 months of 2025 reaches **686.8** Mil.USD, and the rate is **80.6%** of the total in 2024.

### VOLUME

**11.1** thousand tons

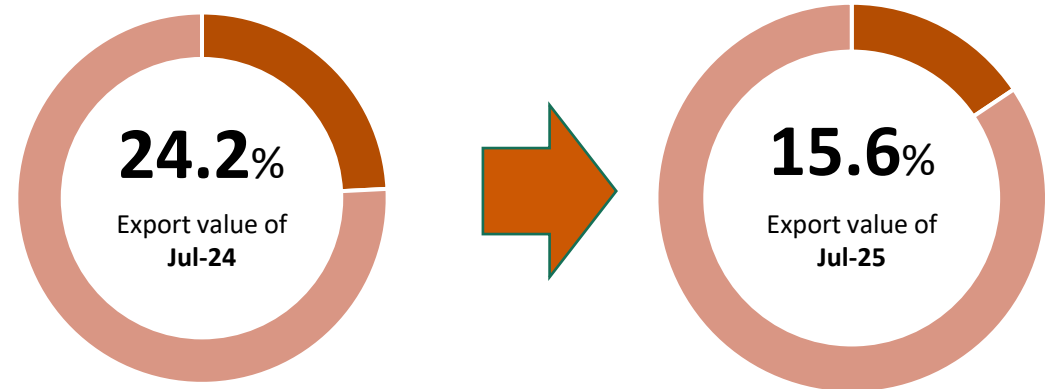
⬇️ Decrease **32.3%** compared to Jun 25

⬇️ Decrease **26.9%** compared to Jul 24

⬇️ **4** thousand tons less than the monthly average rate in 2024.

☐ Accumulated 7 months of 2025 reaches **99.9** thousand tons, and the rate is **55.2%** of the total in 2024.

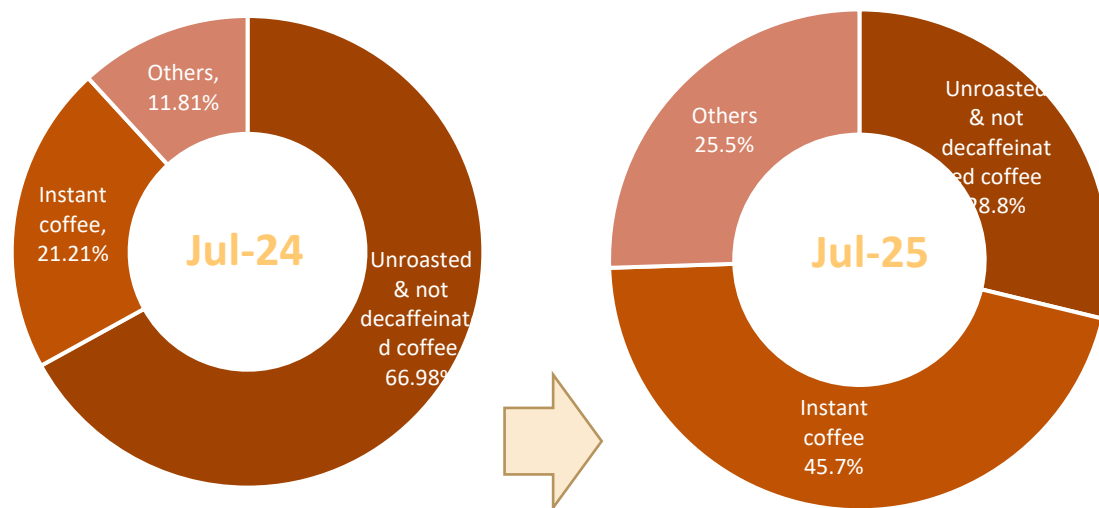
## Changes in percentage of export value to ASEAN Jul-2025



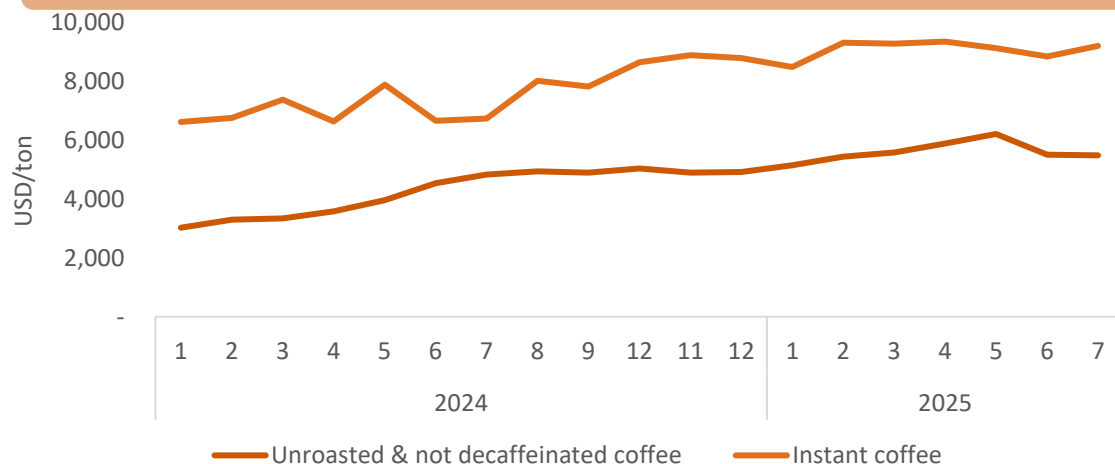


# COFFEE

## Structure of exports by products to ASEAN, Jun-2025



## Average export price to ASEAN, Jun-2025



## Export results to ASEAN, Jun-2025



### Unroasted & not decaffeinated coffee

Value: **21.9** Mil. USD

Decrease **51.8%** compared to Jun 25

Decrease **58%** compared to Jul 24



### Instant coffee

Value: **34.7** Mil. USD

Decrease **28.4%** so compared to Jun 25 Increase **110%**

compared to Jul 24



### Others

Value: **18.6** Mil. USD

Increase **9.2%** compared to Jun 25

Increase **132%** compared to Jul 24

### Instant coffee

The average export price in Jul-25 is **9.190** USD/ton. Increase **4%** compared to the previous month, and Increase **36.5%** compared to the same month in 2024.

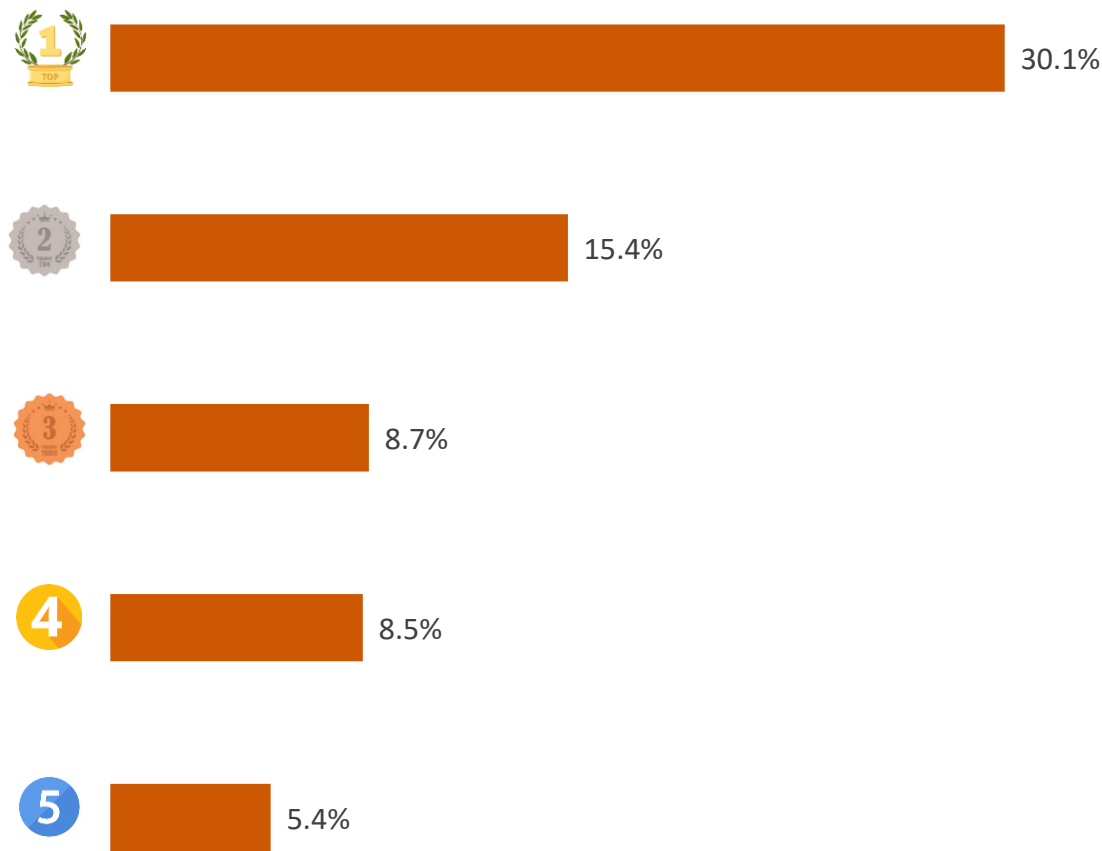
### Unroasted & not decaffeinated coffee

The average export price in Jul-25 is **5.476** USD/ton; Decrease **0.5%** compared to the previous month, and Increase **13.5%** compared to the same month in 2024.

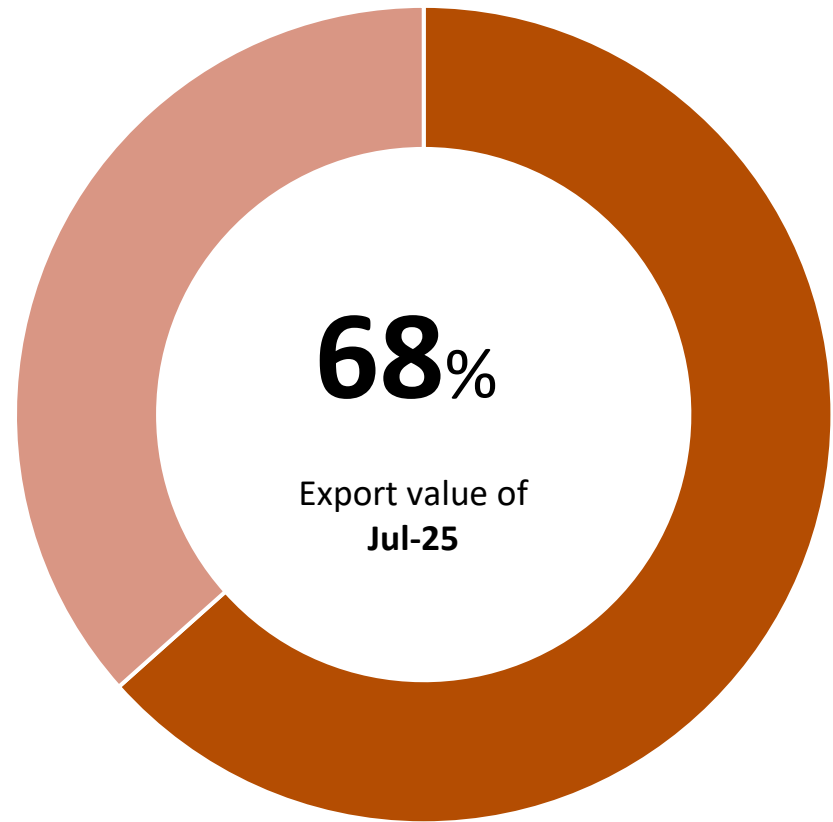


# COFFEE

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





In Laos, climate change is posing serious challenges to the coffee sector, particularly in the Bolaven Plateau, the country's largest production area. In recent years, extreme weather events have damaged tens of thousands of coffee trees, threatening output, quality, and the distinctive flavor profile.

The practice of intercropping coffee with shade trees has been considered as a sustainable solution, helping to protect soil, retain moisture, reduce heat stress, and improve bean quality. Several collaborative projects involving the government, international organizations, and enterprises have piloted this approach, yielding positive results. However, many smallholder farmers remain hesitant, given the lower yields and purchasing prices that do not adequately reflect the value of sustainable production. Despite the rising demand for high-quality coffee, the Lao market continues to emphasize volume and type of coffee rather than environmental considerations. A lack of financial support, technical assistance, and organic certification hampers farmers' ability to access premium markets and constrains the expansion of sustainable agroforestry-based coffee cultivation.





According to trade data from the Indonesian government, Sumatra Island—the country's largest coffee-producing region—exported 532,910 bags of Robusta coffee in July 2025, representing a 69.66% increase compared with the same period last year (218,806 bags). This increase is due to favorable weather conditions and high Robusta futures prices, which significantly boosted the export value of green coffee.

In total, during the first four months of the 2025/2026 crop year (April 2025–March 2026), Indonesia exported 2,238,089 bags of Robusta, marking a 235.19% increase from the same period of the previous crop year (1,570,389 bags). The new crop year—comprising approximately 85% Robusta and 15% Arabica—is cautiously projected to reach a median estimate of 12 million bags.





# FISHERIES

## Export value to ASEAN, May-2025



## Export results to ASEAN, May-2025

VALUE

**63.5** Mil. USD

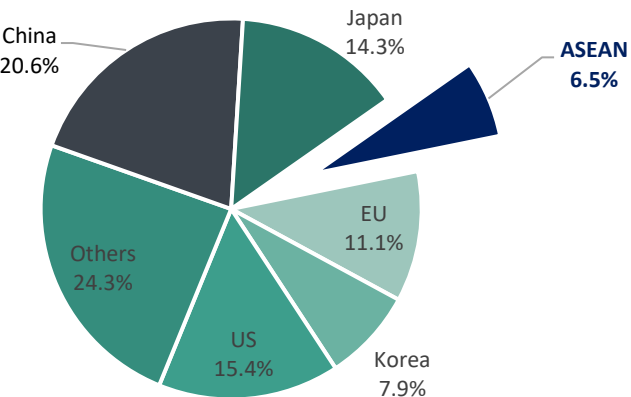
↗ Increase **6.6%** compared to Jun 25

↗ Increase **20.1%** compared to Jul 24

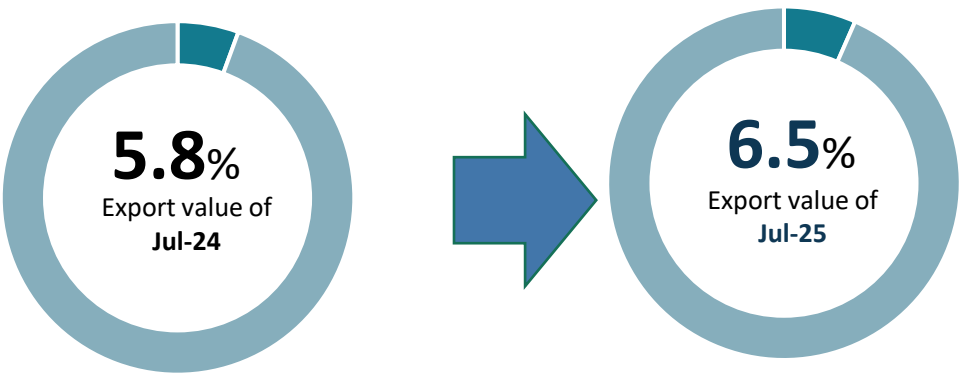
▲ **10.6 Mil. USD** more than the monthly average rate in 2024

◆ Accumulated 7 month of 2025 reaches **392.0 Mil. USD**, and the rate is **61.8%** of the total in 2024.

## Percentage of export value to ASEAN, May-2025



## Change in percentage of export to ASEAN, May-2025

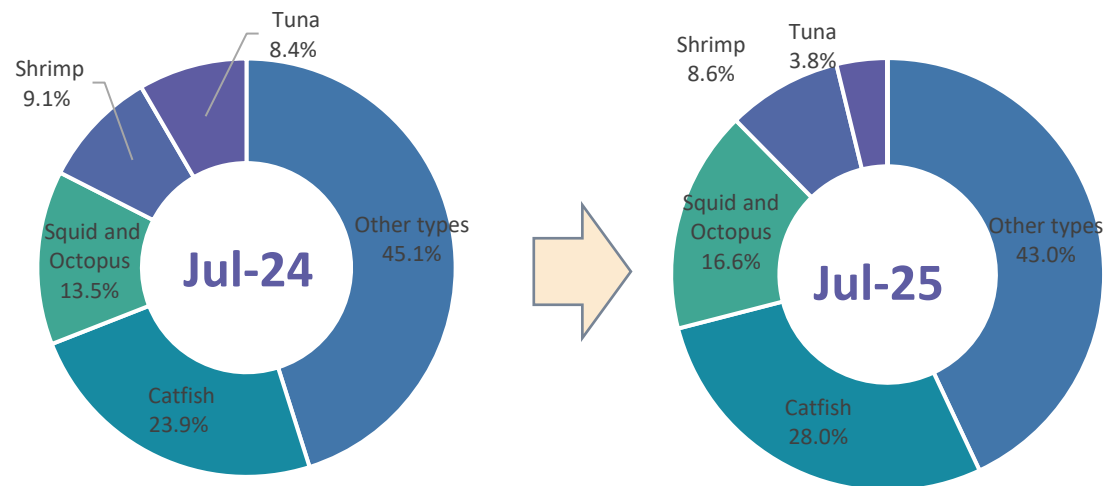


Source: Calculated from data of the Department of Customs

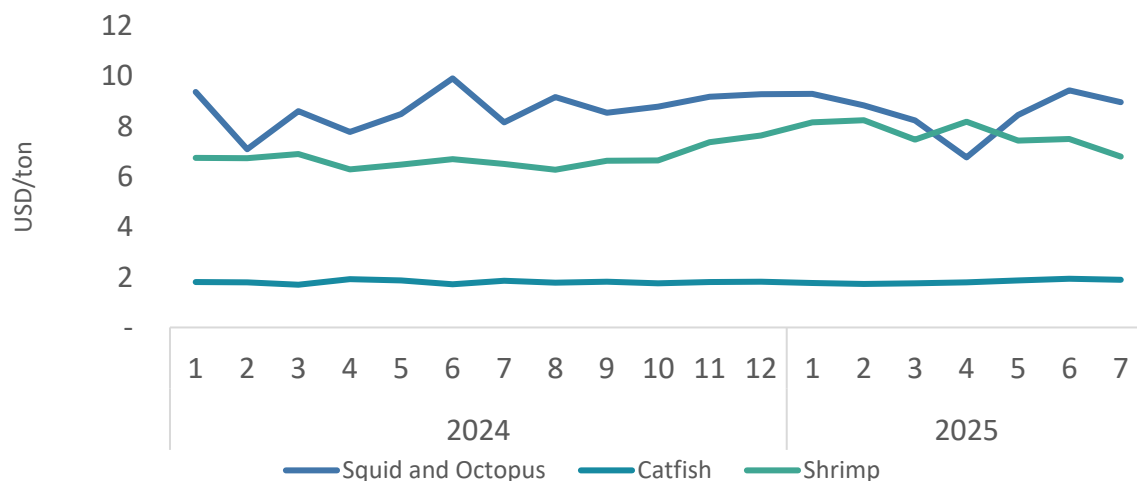


# FISHERIES

## Structure of exports by products to ASEAN, Jul-2025



## Average export price to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025



### Catfish

Value: **17.7** Mil. USD

Increase **12.2%** compared to Jun 25

Increase **40.4%** compared to Jul 24



### Squid & Octopus

Value: **10.6** Mil. USD

Increase **8.4%** compared to Jun 25

Increase **48.6%** compared to Jul 24



### Shrimp

Value: **5.4** Mil. USD

Decrease **8.0%** compared to Jun 25

Increase **13.2%** compared to Jul 24

### Squid & Octopus

The average export price in Jul-25 is **9.0** USD/kg; **Decrease 5.0%** compared to the previous month; and **Increase 9.8%** compared to the same month in 2024.

### Catfish

The average export price in Jul-25 is **1.9** USD/kg; **Decrease 1.9%** compared to the previous month; and **Increase 2.4%** compared to the same month in 2024.

### Shrimp

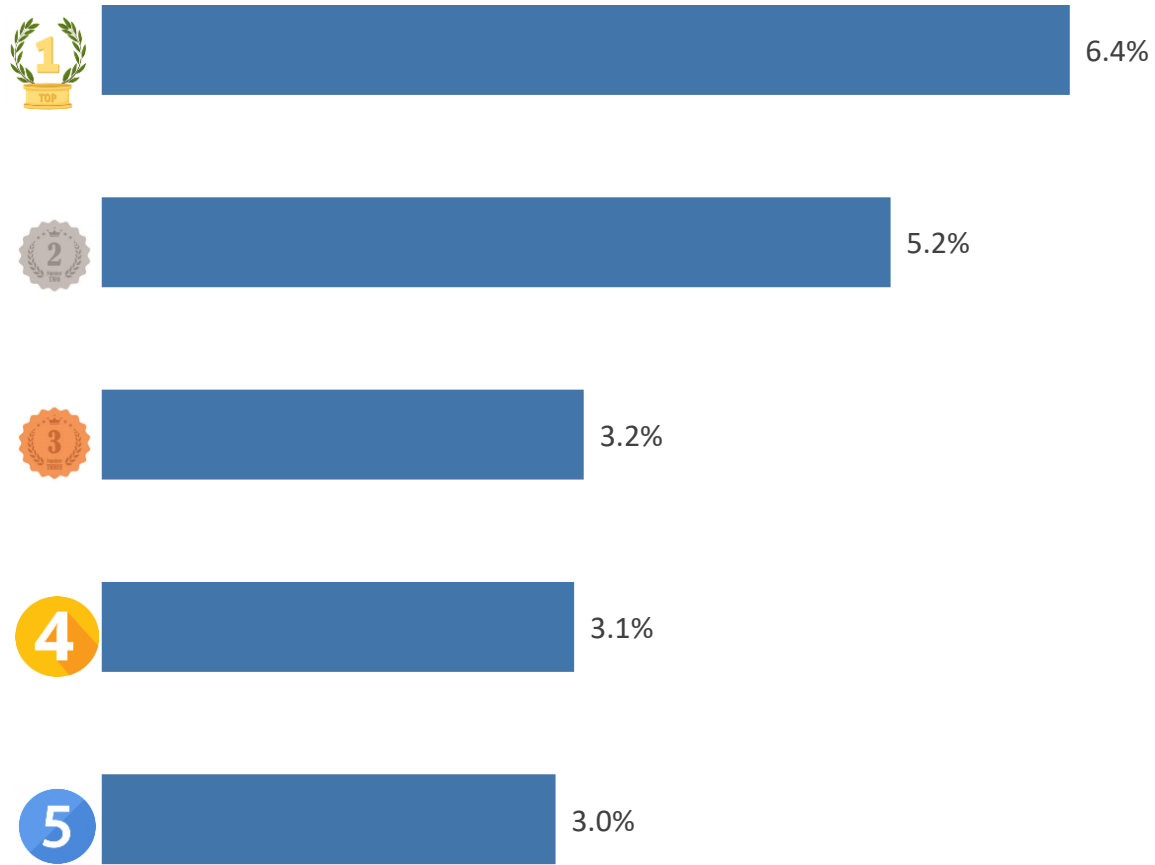
The average export price in Jul-25 is **6.8** USD/kg; **Decrease 93%** compared to the previous month; and **Increase 4.5%** compared to the same month in 2024.



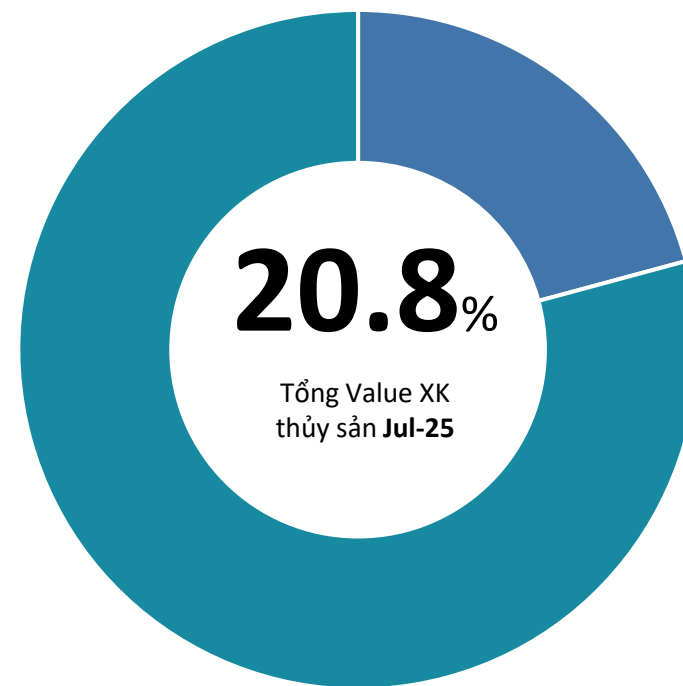


# FISHERIES

## TOP 5 export enterprises by value to ASEAN, Jul-2025



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



20.8%

Tổng Value XK  
thủy sản Jul-25

01

### Indonesia: Shrimp exports increase in the first half of 2025

In the first half of 2025, Indonesia exported 105,259 tons of shrimp, an increase of 13% compared with the same period in 2024, with an export value of USD 889 million (+23%), driven by strong demand for vannamei (white-leg shrimp) and value-added products.

In June-25, Indonesia's shrimp exports reached 16,036 tons (USD 133 million), rising by 2% in volume and 10% in value. Exports of raw vannamei surged by 24% to 7,979 tons, while black tiger shrimp exports fell by 39% to 549 tons.

The United States remained the Indonesia's largest shrimp market. During the six-month period, export volumes to the U.S. totaled 69,653 tons (+12%). Exports also increased to Japan (+5%), China (+19%), the EU (+58%), and Canada (+94%). If this momentum continues, Indonesia's shrimp exports could exceed 200,000 tons in 2025.

*Source: Vasep*





# WOOD & WOODEN PRODUCTS

## Export volume and value to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025



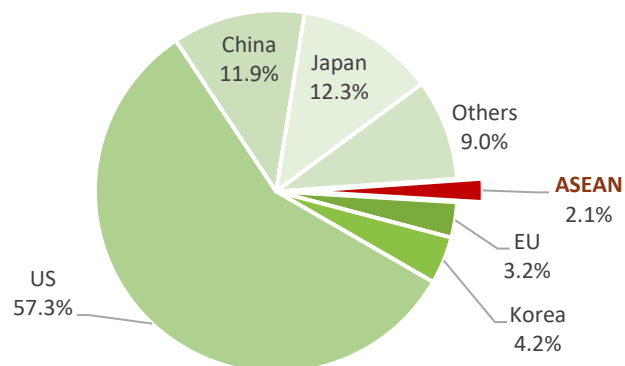
↗ Increase **5.6%** compared to Jun 25

↘ Decrease **9.3%** compared to Jul 24

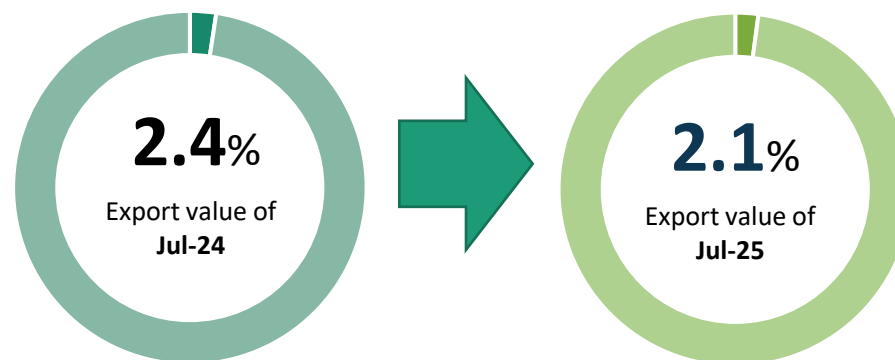
↗ **2.9 Mil. USD** less than the monthly average rate in 2024

Accumulated 7 months of 2025 reaches **205.9 Mil. USD**, and the rate is **62.6%** of the total in 2024.

## Percentage of export value to ASEAN, Jul-2025



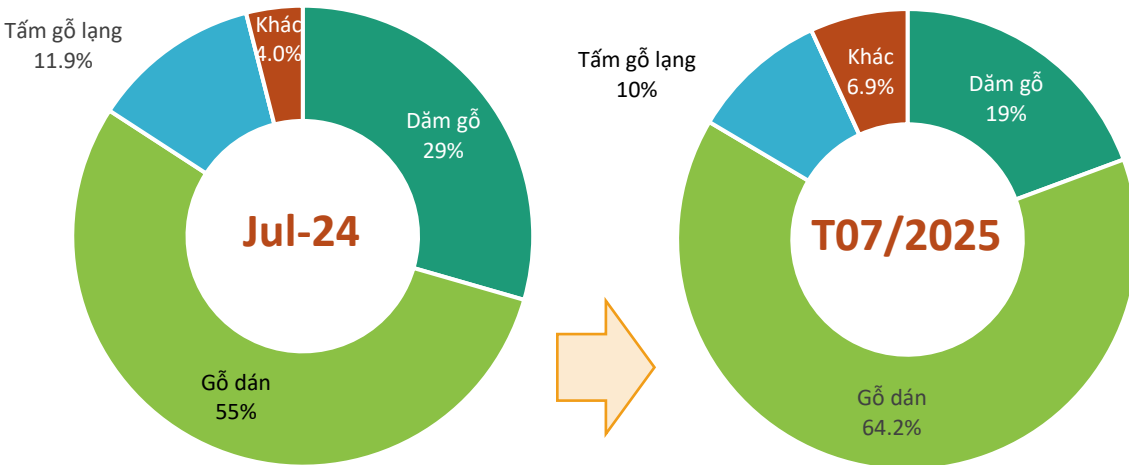
## Changes in percentage of export value to ASEAN, Jul-2025





# WOOD & WOODEN PRODUCTS

## Structure of exports by products to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025



### Plywood

Value: **22.5** Mil. USD

Decrease **3%** Compared to Jun 25

Decrease **6%** compared to Jul 24



### Wood chips

Value: **6.8** Mil. USD

Decrease **53%** Compared to Jun 25

Decrease **48%** compared to Jul 24



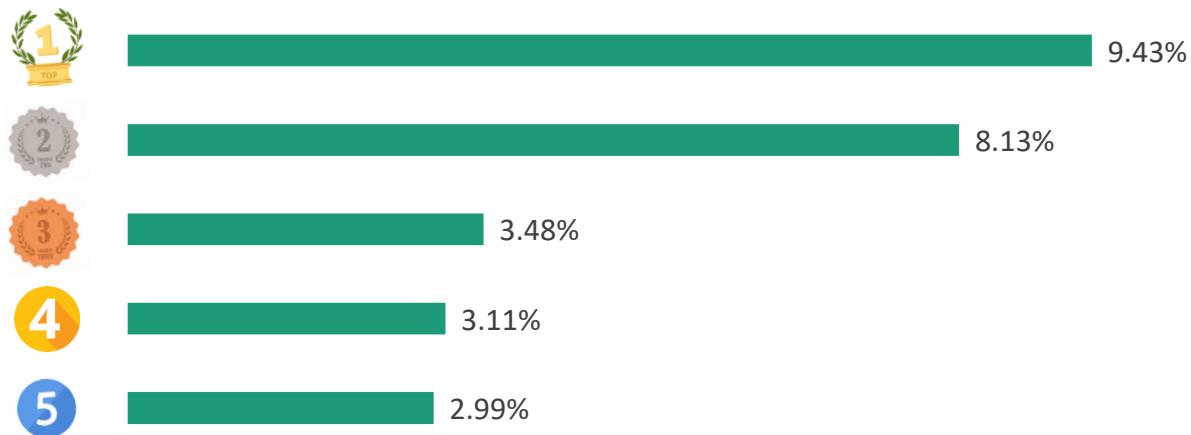
### Wood slabs

Value: **3.4** Mil. USD

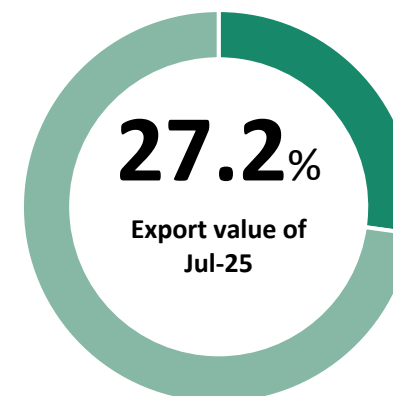
Decrease **7%** Compared to Jun 25

Decrease **35%** compared to Jul 24

## TOP 5 export enterprises by value to ASEAN, Jul-2025



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





# WOOD & WOODEN PRODUCTS

## SPOTLIGHT



According to the Indonesian Furniture and Handicraft Industry Association (HIMKI), the country's furniture and handicraft sector is facing persistent structural challenges, including high production and logistics costs, reliance on imported raw materials, and intense competitive pressures. To address these issues, HIMKI emphasized the need for a “mindset transformation” across the industry, shifting from design imitation to a focus on creativity and the proactive adoption of modern technologies.

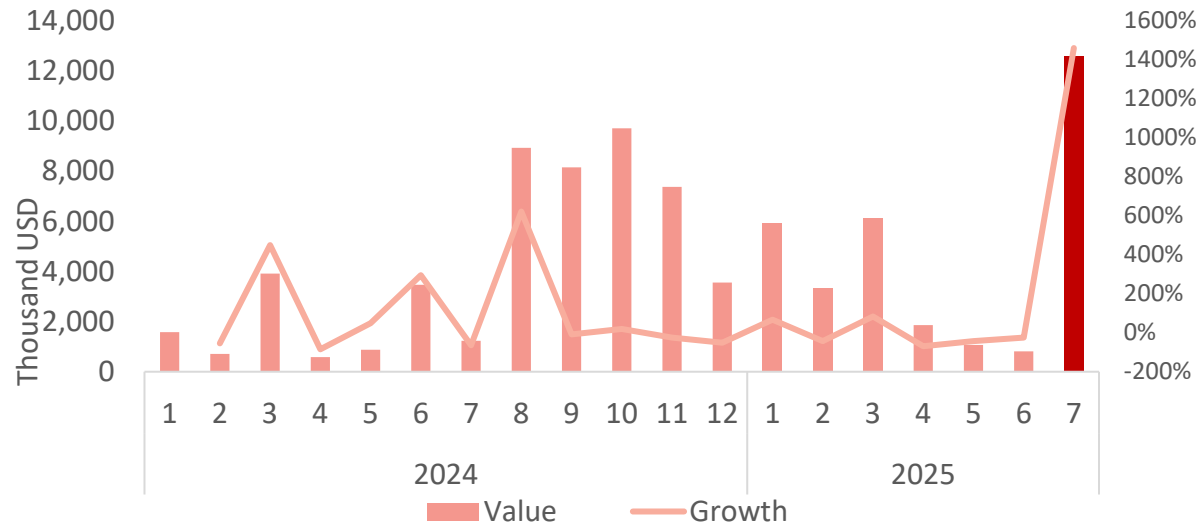
Malaysia's wood export turnover reached MYR 9.03 billion (USD 2.14 billion) in the first five months of 2025, demonstrating resilience amid challenges such as tariffs and the global economic slowdown. However, a new concern has emerged following reports that the United States may launch investigations and impose higher duties on furniture products. This development, coupled with the industry's ongoing efforts to comply with the European Union Deforestation Regulation (EUDR) and its complex requirements, poses significant challenges for Malaysia's wood and furniture sector in the near future.



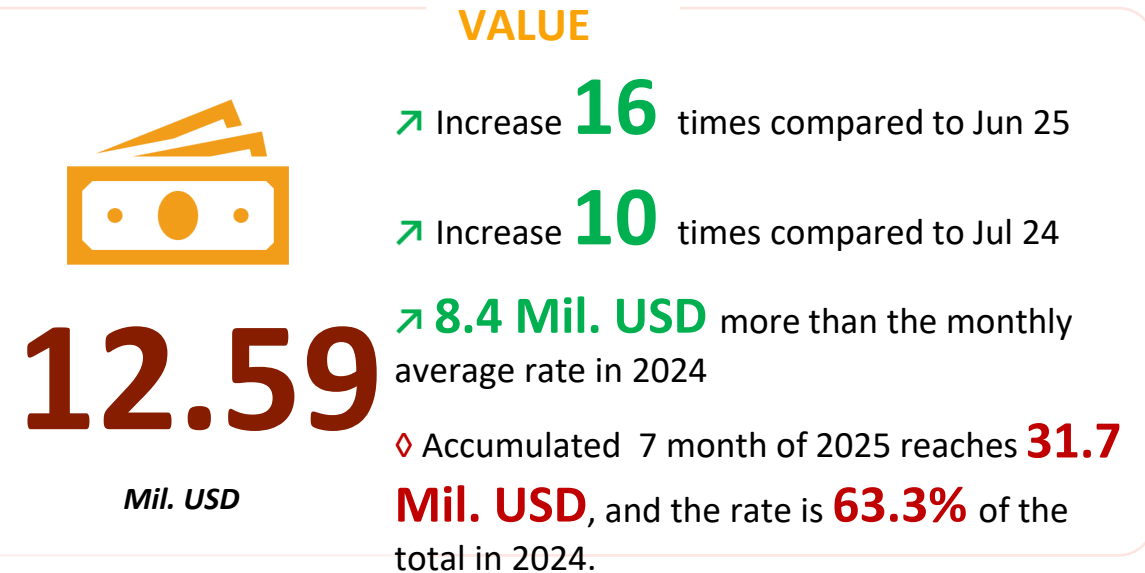


# MEAT & MEAT PRODUCTS (EXPORT)

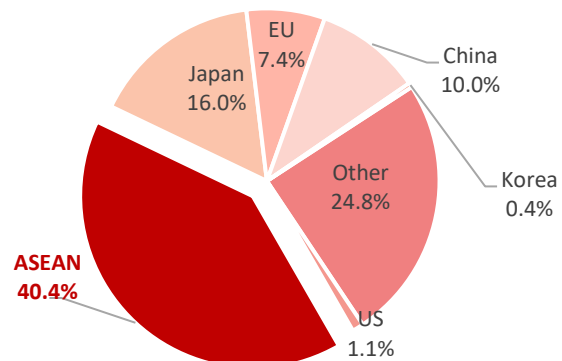
## Export value to ASEAN, Jul-2025



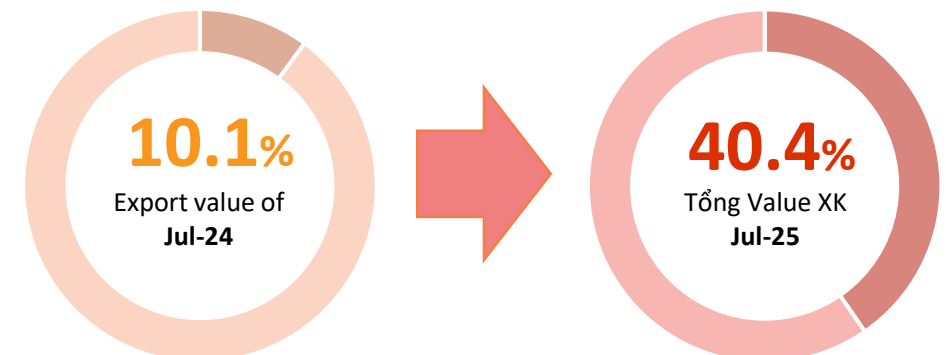
## Export results to ASEAN, Jul-2025



## Percentage of export value to ASEAN, Jul-2025



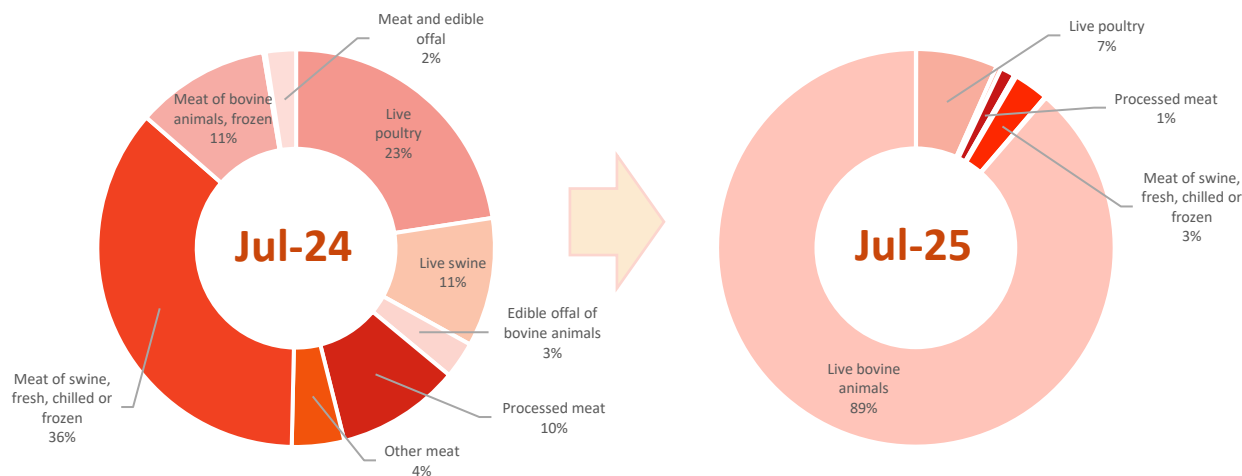
## Changes in percentage of export value to ASEAN, Jul-2025





# MEAT & MEAT PRODUCTS (EXPORT)

## Export value to ASEAN, Jul-2025



## Export results to ASEAN, Jul-2025



**Live bovine animals**  
Value: **11.2** Mil. USD

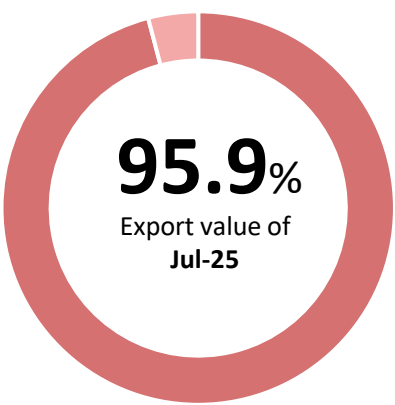


**Live poultry**  
Value: **834.9** thousand USD  
Increase **61.5%** compared to Jun 25  
Increase **199.2%** compared to Jul 24

## Percentage of export value to ASEAN, Jul-2025



## Changes in percentage of export value to ASEAN, Jul-2025

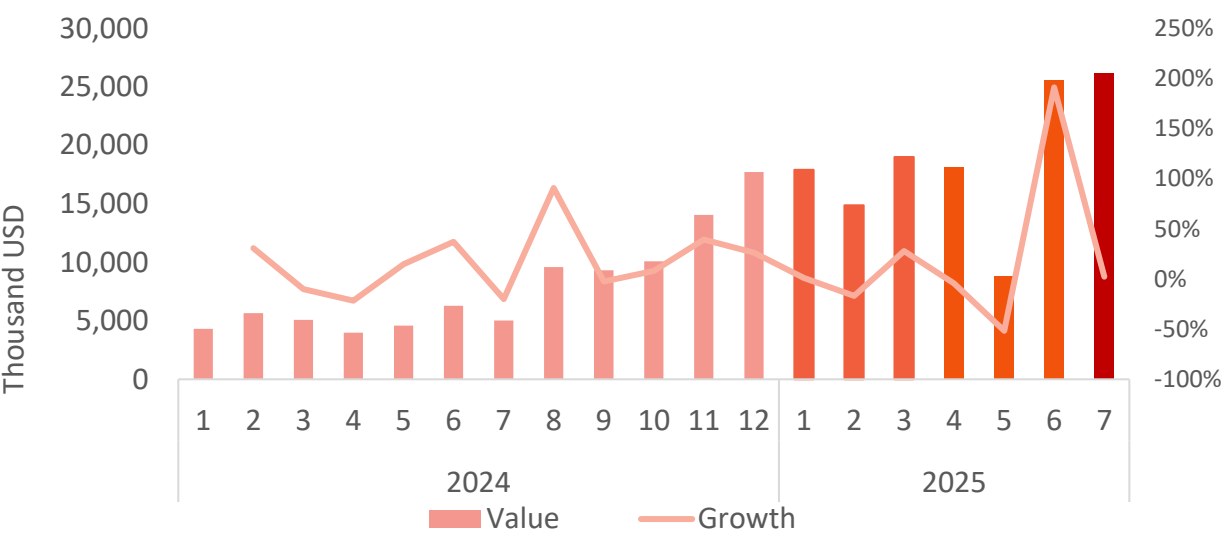


Source: Calculated from data of the Department of Customs




# MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Jul-2025



Import results to ASEAN, Jul-2025



**26.1**  
Mil. USD

Value

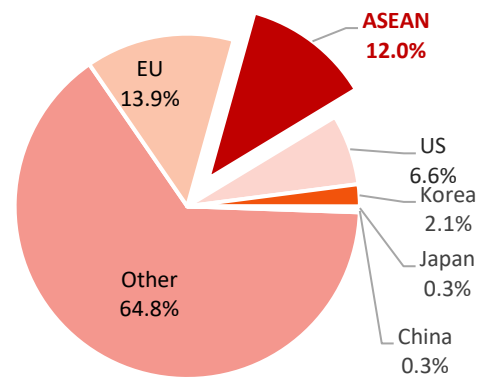
↗ Increase **2.4%** compared to Jun 25

↗ Increase **420%** compared to Jul 24

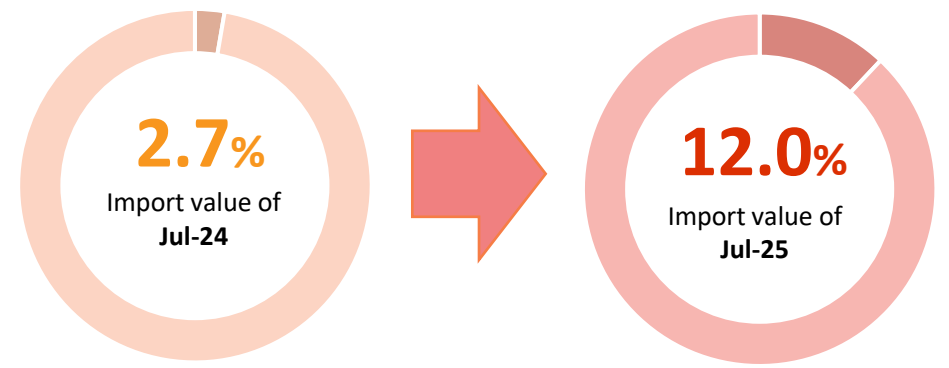
↗ **18.2 Mil USD** more than the monthly average rate in 2024

◇ Accumulated 7 month of 2025 reaches **130.4 Mil. USD**, and the rate is **136%** of the total in 2024.

Percentage of import value to ASEAN, Jul-2025



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

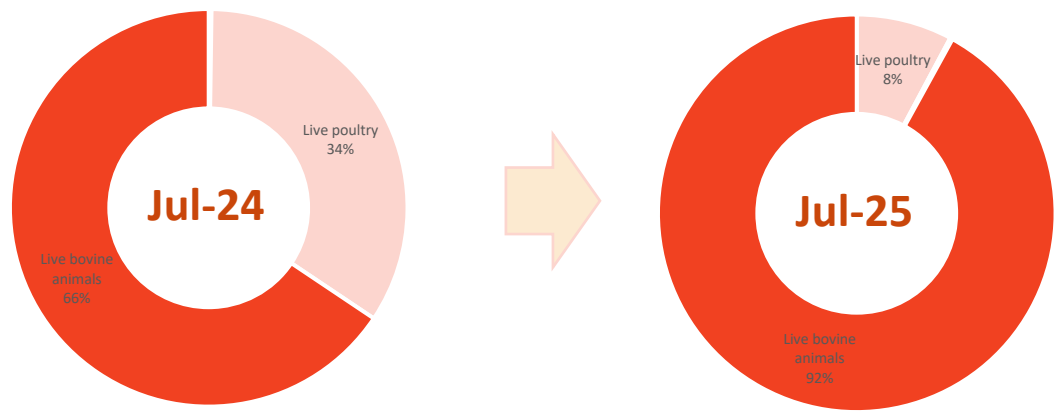


Source: Calculated from data of the Department of Customs



# MEAT & MEAT PRODUCTS (IMPORT)

## Import value to ASEAN, Jul-2025



## Import results to ASEAN, Jul-2025



### Live bovine animals

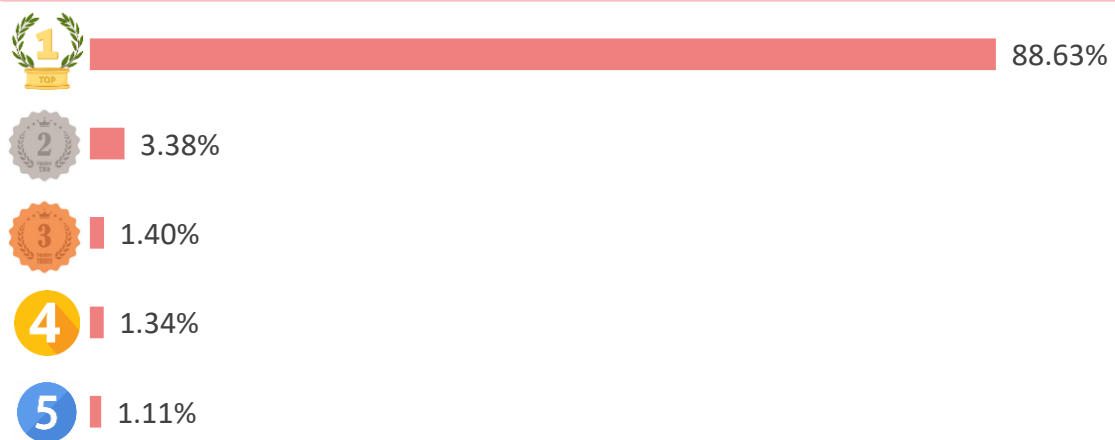
Value: **24.04** Mil. USD  
Giảm **1.7%** compared to Jun 25  
Increase **629.9%** compared to Jul 24



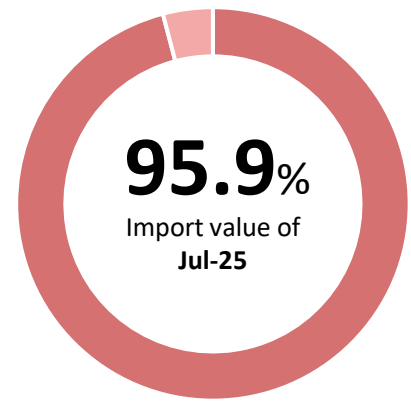
### Live poultry

Value: **2.03** Mil. USD  
Increase **90.9%** compared to Jun 25  
Increase **18.8%** compared to Jul 24

## Percentage of import value to ASEAN, Jul-2025



## Changes in percentage of import value to ASEAN, Jul-2025



Source: Calculated from data of the Department of Customs



# MEAT & MEAT PRODUCTS

## SPOTLIGHT



According to the Brazilian Ministry of Agriculture and Livestock (Mapa), Indonesia has officially authorized the import of beef from Brazil following an agreement between the two sides on sanitary requirements covering bone-in beef, offal, and other beef products and derivatives.

With a population of approximately 283 million, Indonesia represents a strategic market for animal protein. Beef consumption in the country has been steadily increasing in recent years, driven by rising incomes and the expansion of the urban middle class.

*Source: en.antaranews.com*







For feedback, please send to:

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