

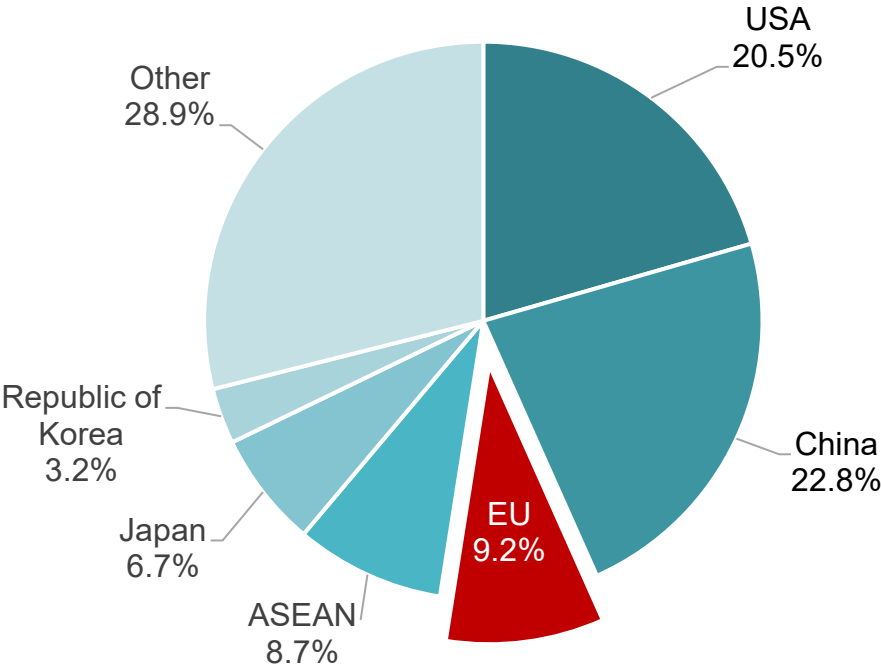


# MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

FROM VIETNAM TO **THE EU MARKET**

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

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

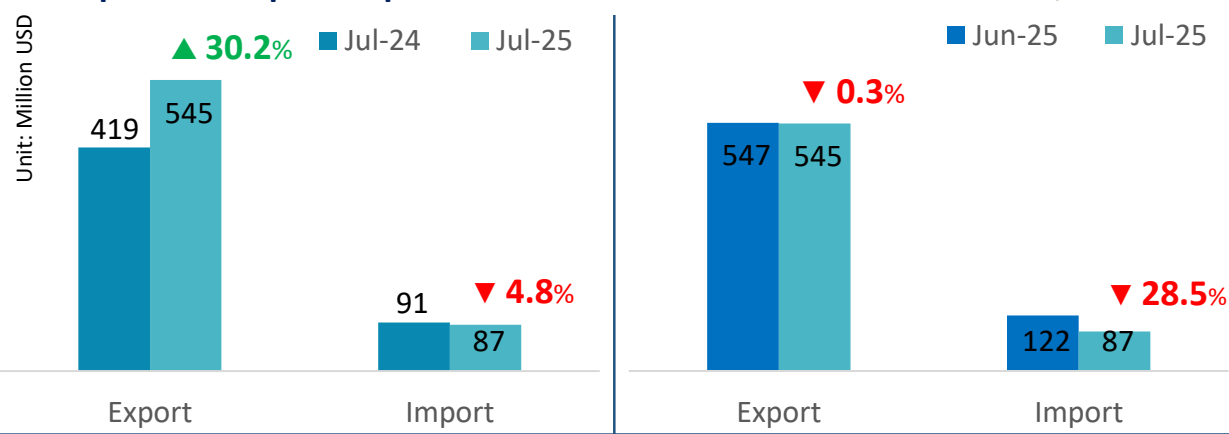


Changes in export proportion of AFF product to the EU Jul-2025 compared to Jun-2025 and Jul-2024

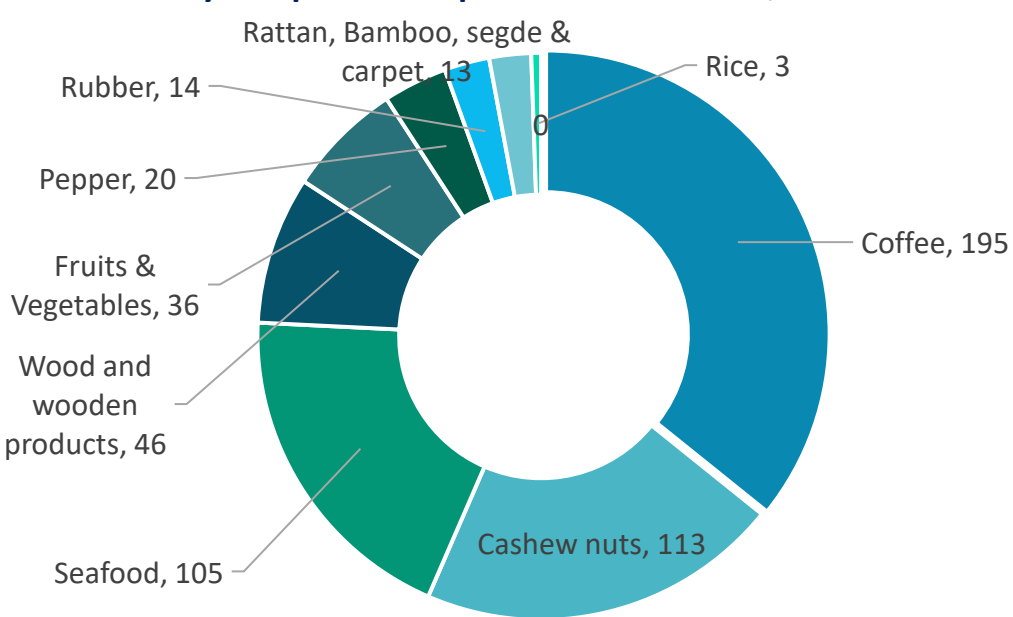
	Export value (mil. USD)	Compared to Jun-2025	Compared to Jul-2024
USA	1,222	▲ 0.3%	▼ 3.2%
China	1,356	▲ 0.1%	▲ 2.6%
EU	545	▼ 0.4%	▲ 1.3%
ASEAN	515	▲ 0.2%	▼ 2.9%
Japan	398	▼ 0.4%	▼ 0.2%
Republic of Korea	192	▼ 0.1%	▼ 0.5%
Total export	5,950		

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

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

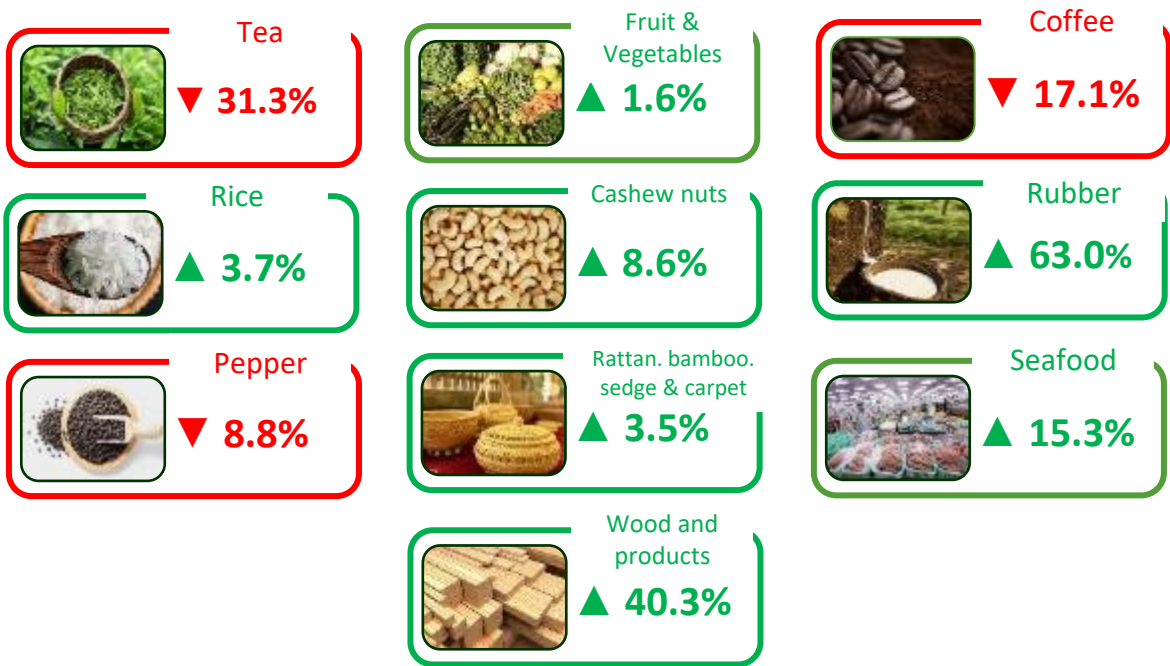


Key AFF product export value to the EU, Jul-2025

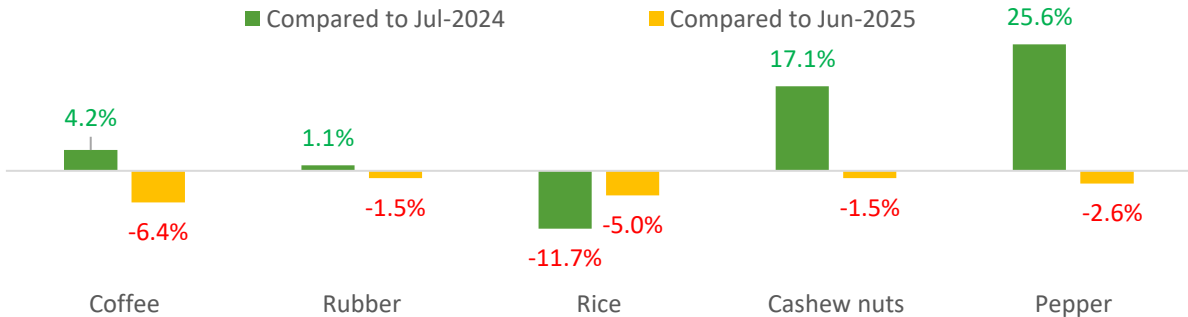


Unit: Million USD

Changes in key AFF product export value to the EU in Jul-2025 compared to Jun-2025



Changes in average export value of key AFF products to the EU in Jul-2025 compared to Jul-2024 and Jun-2025



Source: Calculated from data of the Department of Customs



## The EU is a potential market for Vietnamese agricultural products

With a population of 450.4 million in 2025 and a GDP of USD 19.4 trillion in 2024, nearly 18% of global GDP, and annual food and beverage spending of EUR 1.1 trillion, the European Union (EU) is one of the world's largest and most demanding markets for agriculture, forestry, and fishery goods.

In 2024, the EU's imports of agriculture

forestry, and fishery products reached USD 348 billion and will achieve USD 363.9 billion in 2025. The key import products include fruits and vegetables, seafood, coffee, cashew nuts, wood products, and pepper, accounting for 30–60% of total global imports. Vietnam is currently one of the important suppliers, with its agricultural exports to the EU steadily increasing from USD 3.76 billion in 2019 to USD 5.44 billion in 2024. In the first seven months of 2025, the export from Viet

Nam reached USD 4.73 billion, up 49% year-on-year. Major export items include coffee, seafood, wood products, cashew nuts, and fruits and vegetables. In EU, Germany is the largest importing market, followed by the Netherlands, Spain, Belgium, and Italy. Vietnam's export value, however, only accounts for around 2% of the EU's total agricultural imports, indicating significant potential for further growth.

Source: Daidoanket.vn



## ECB likely holds interest rates because of the lowest unemployment rate

In July 2025, the unemployment rate in the EU declined to the lowest rate of 6.2%. However, the growth rate in Eurozone slowed as exports to the United States were affected by new tariffs, causing Q2/2025 GDP to rise by only 0.1% quarter-on-quarter and 1.4% year-on-year. Despite this, the labor market remained stable, showing that companies remain cautious about reducing staff when the workforce is already shrinking. The European Central Bank (ECB) forecasts that unemployment will fall further, potentially reaching a new record low in 2026.

In August, the inflation climbed to 2.1%, exceeding the ECB's official 2% target, while core inflation was steady at 2.3%. In the context of increasing inflation and unstable economy recover, the ECB is likely to keep its unchanged interest rate at 2% at the September meeting and possibly maintain this level in the following months. Although the 15%

tariff imposed by the U.S. places pressure on Europe's economy, strong domestic demand continues to support a low jobless rate, allowing the ECB to maintain its stance without creating additional risks for economic growth.

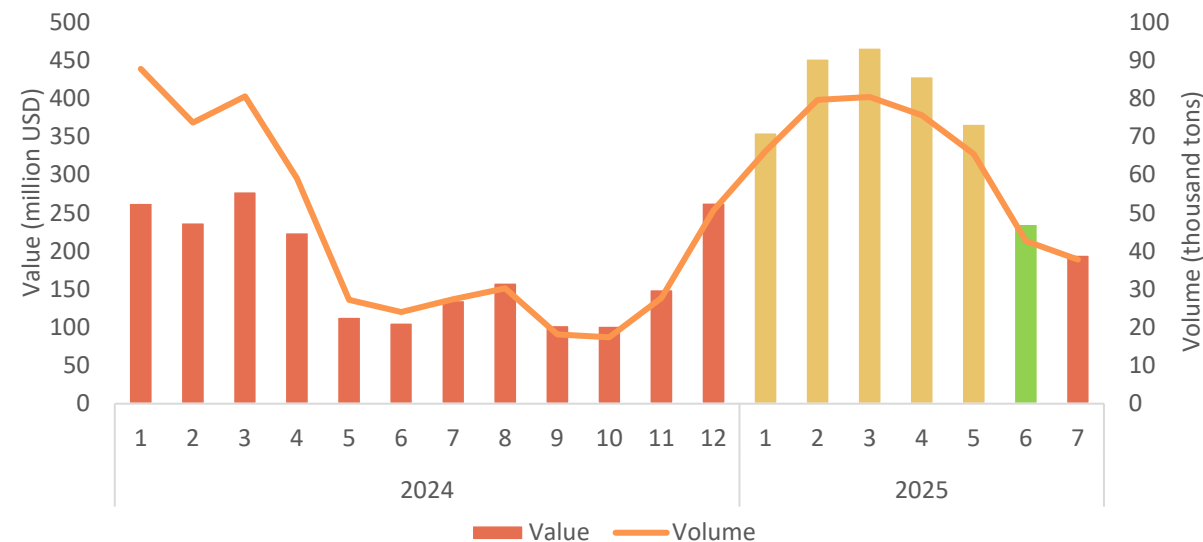
Source: Vneconomy.vn





# COFFEE

## Export volume and value to the EU, Jul-2025



## Export results to the EU, Jul-2025

### VALUE

**195.1** mil. USD

⬇️ Decrease **17.1%** compared to Jun-2025

⬆️ Increase **43.9%** compared to Jul-2024

⬆️ **17.1 mil. USD** more than compared to monthly average rate in 2024.

❖ Accumulated 7 months of 2025 reaches **2.5 bil.USD, 117.1%** of total 2024.

### VOLUME

**37.8** thousand tons

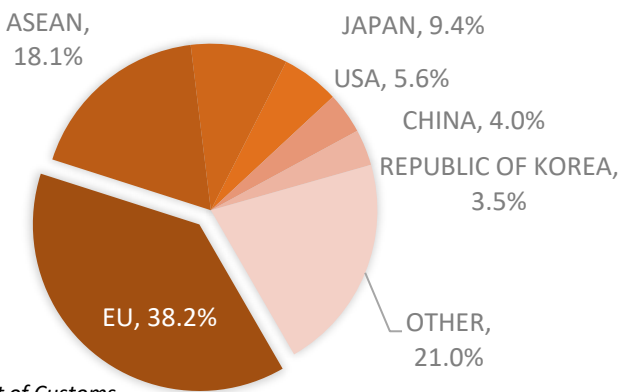
⬇️ Decrease **11.5%** compared to Jun-2025

⬆️ Increase **38.2%** compared to Jul-2024

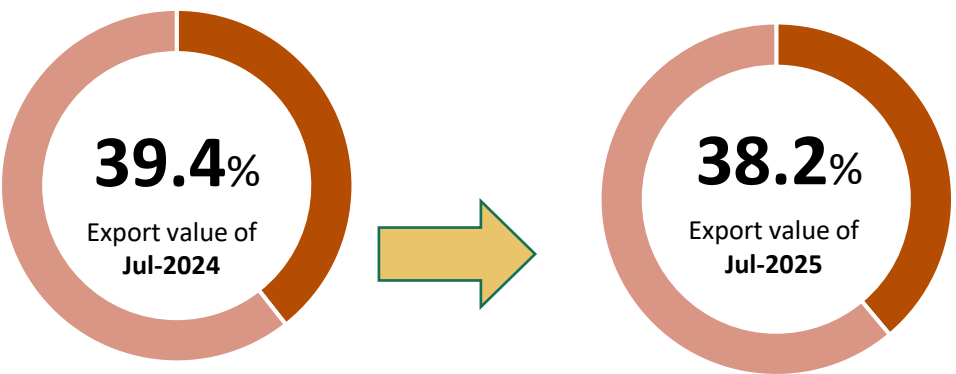
⬇️ **5.9 thousand tons** less than compared to monthly average rate in 2024.

❖ Accumulated 7 months of 2025 reaches at **447.6** thousand tons, **85.5%** of total 2024.

## Percentage of export value to the EU, Jul-2025



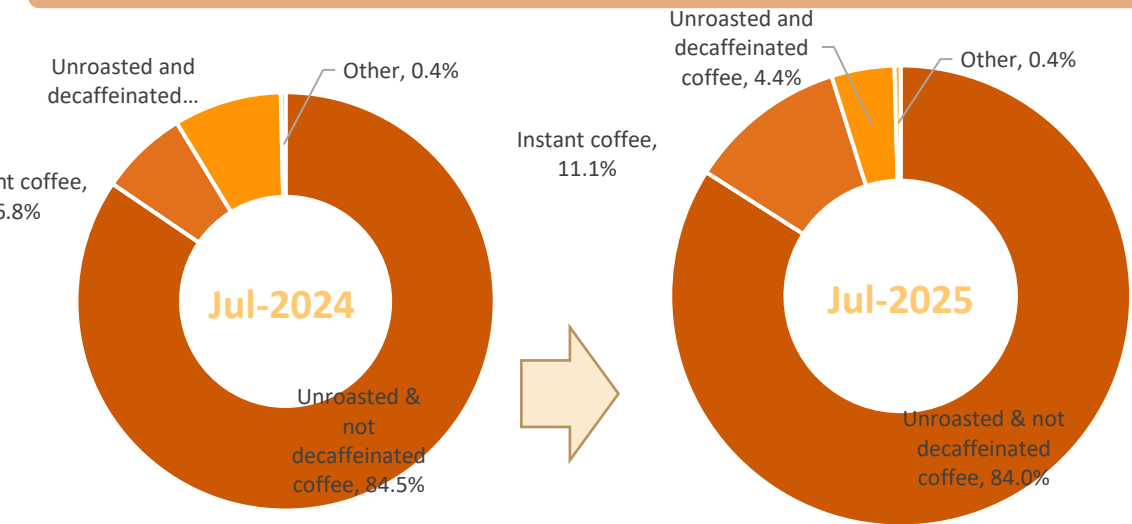
## Changes in percentage of export value to the EU, Jul-2025



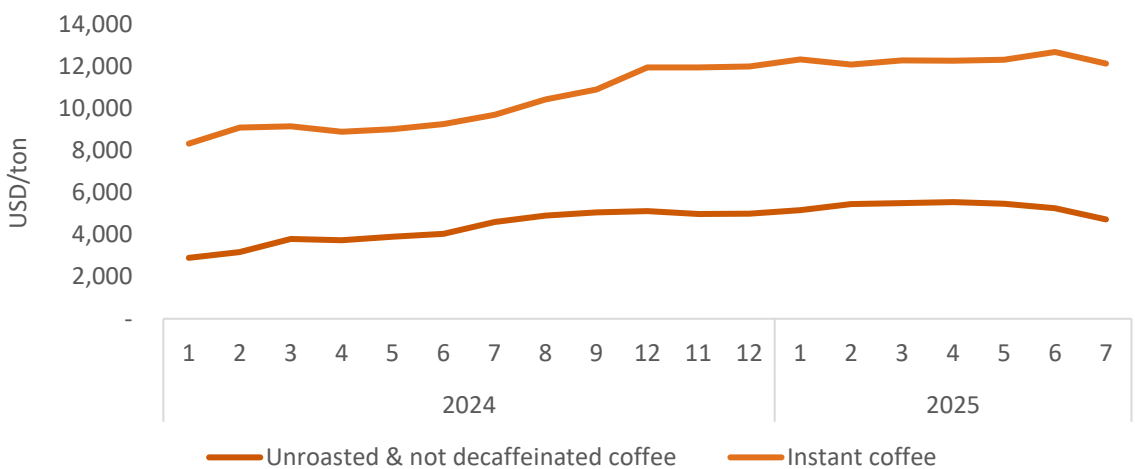


# COFFEE

## Structure of exports by products to the EU, Jul-2025



## Average export price to the EU, Jul-2025



Source: Calculated from data of the Department of Customs

## Export results to the EU, Jul-2025



**Unroasted & not decaffeinated coffee**  
Value: **165** mil. USD  
Decrease **19%** compared to Jun-2025  
Increase **50.4%** compared to Jul-2024



**Instant coffee**  
Value: **21.9** mil. USD  
Decrease **2.7%** compared to Jun-2025  
Increase **108%** compared to Jul-2024



**Unroasted and decaffeinated coffee**  
Value: **8.7** mil. USD  
Decrease **46.8%** compared to Jun-2025  
Decrease **19.7%** compared to Jul-2024

### Instant coffee

The average export price in Jul-2025 is **12.126** USD/ton; decrease **4.3%** compared to the previous month, and increase **2.7%** compared to the same month 2024

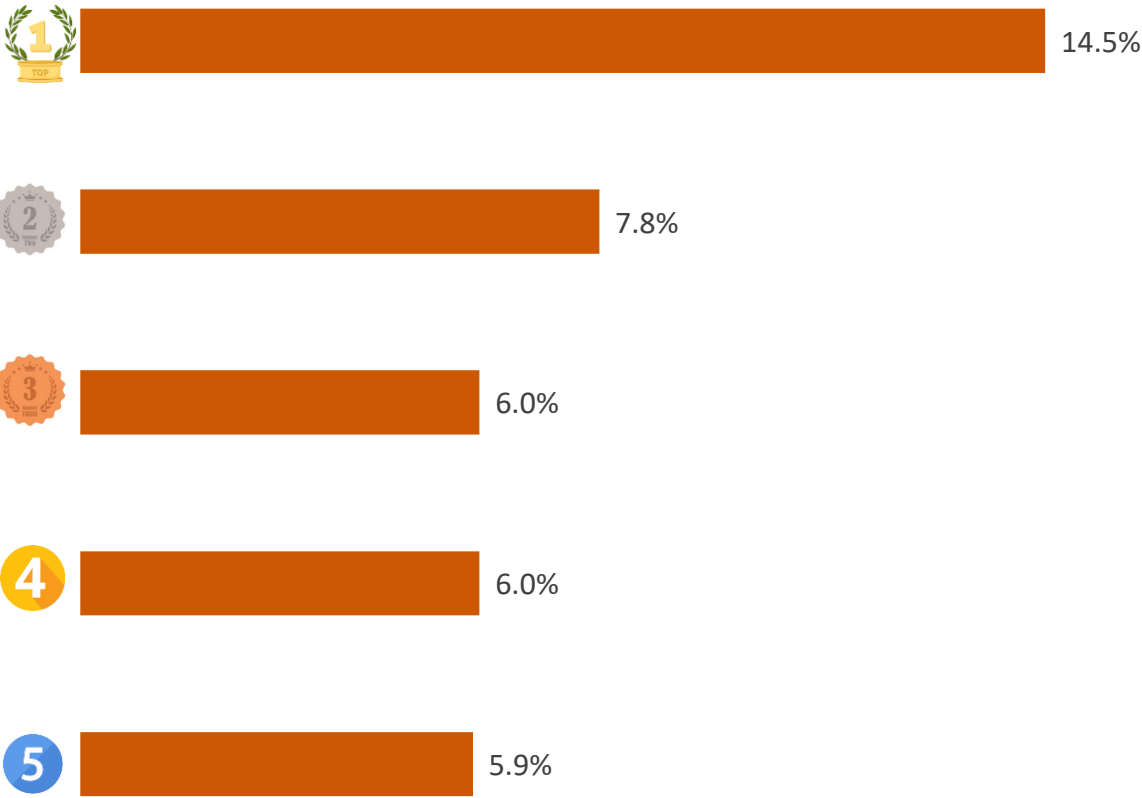
### Unroasted & not decaffeinated coffee

The average export price in Jul-2025 is **4.714** USD/ton; decrease **10.2%** compared to the previous month, and increase **2.4%** compared to the same month 2024

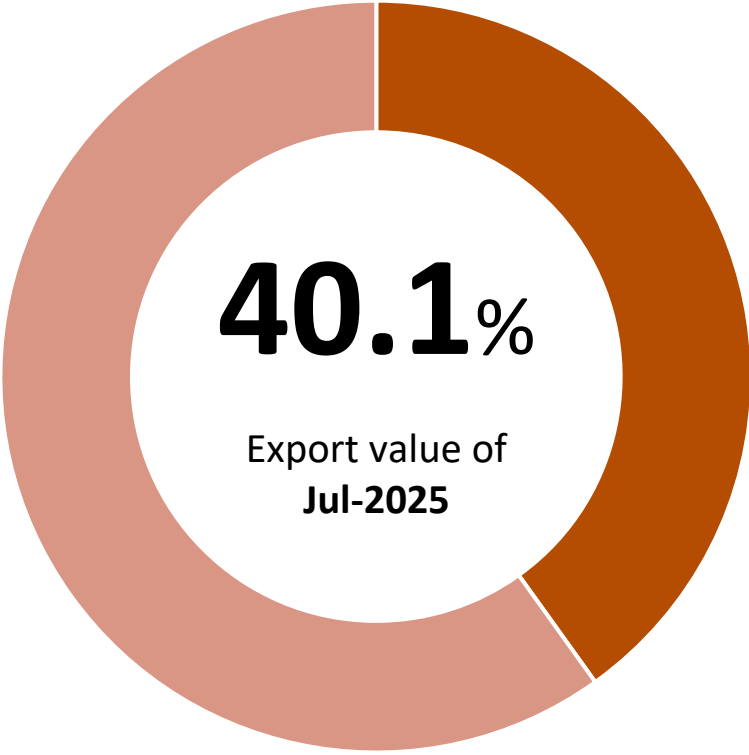


# COFFEE

TOP 5 export enterprises by value to the EU, Jul-2025



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



Source: Calculated from data of the Department of Customs





# COFFEE

## SPOTLIGHTS

According to the latest report of the European Coffee Federation (ECF), coffee stocks at ports in Belgium, Germany, France, Italy, and Spain reached 7,916,100 bags by the end of June 2025, representing an increase of 5.99% compared to the previous month. Of this total, 3,221,233 bags were Robusta, 2,346,833 bags were natural arabica (including Brazil semi-washed), and 2,348,033 bags were washed arabica.

Compared with the same period in 2024 (8,410,783 bags), overall inventories were slightly lower. By type, Robusta rose by 5.18% compared to the first five months of 2024; natural arabica declined marginally by 0.50%; while washed arabica recorded a sharp decrease of 21.45%.

The current stock level, which also includes certified coffee held in registered warehouses on the New York and London exchanges, is equivalent to roughly eight weeks of roasting activity, a level considered low by industry standards. The previous record-low inventory was observed in March 2024, at 6.40 million bags.

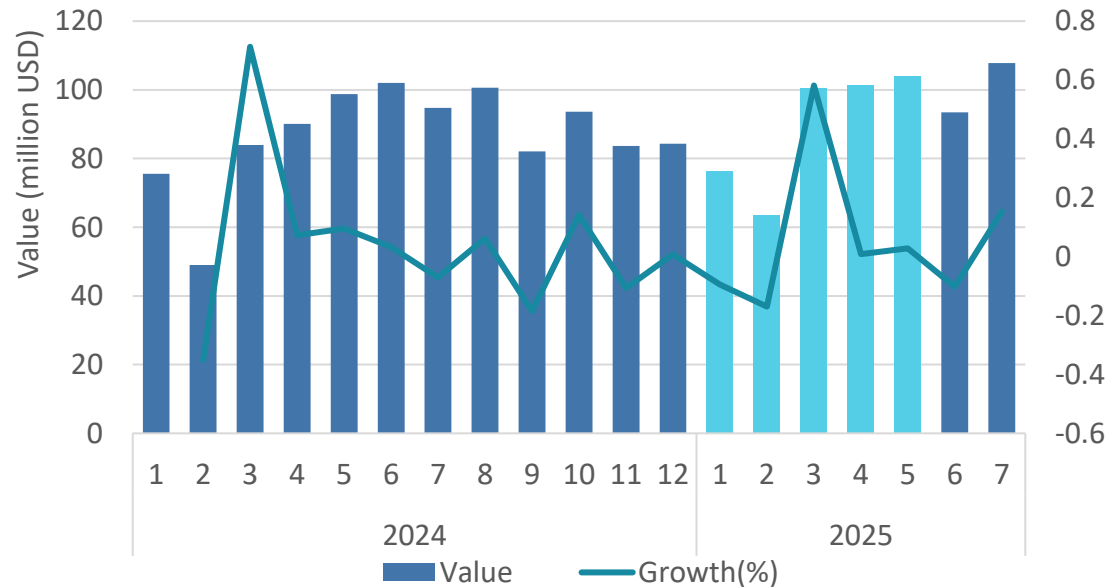




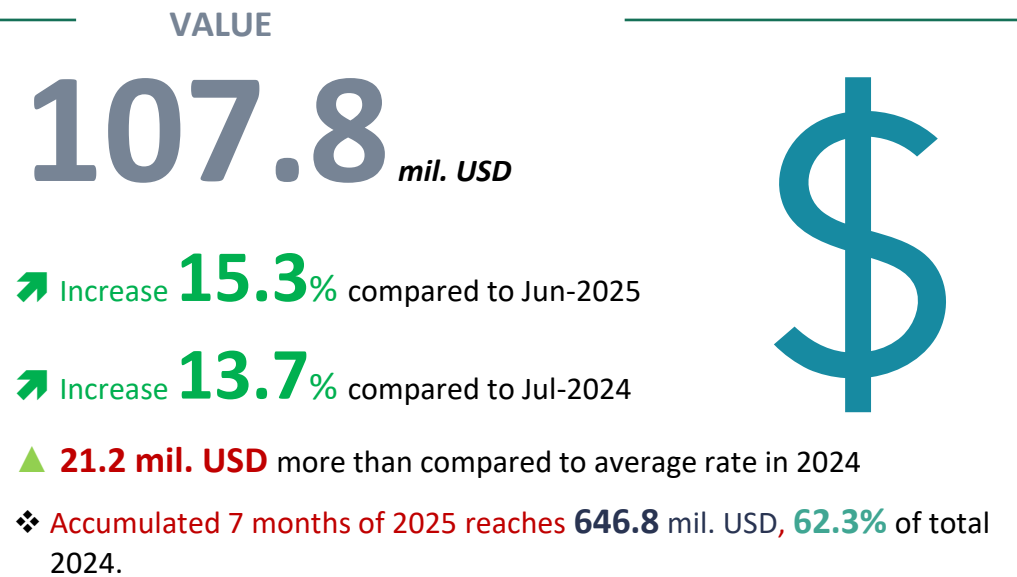


# SEAFOOD

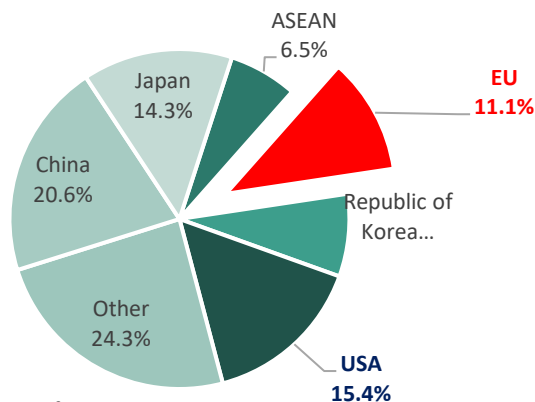
## Export value to the EU, Jul-2025



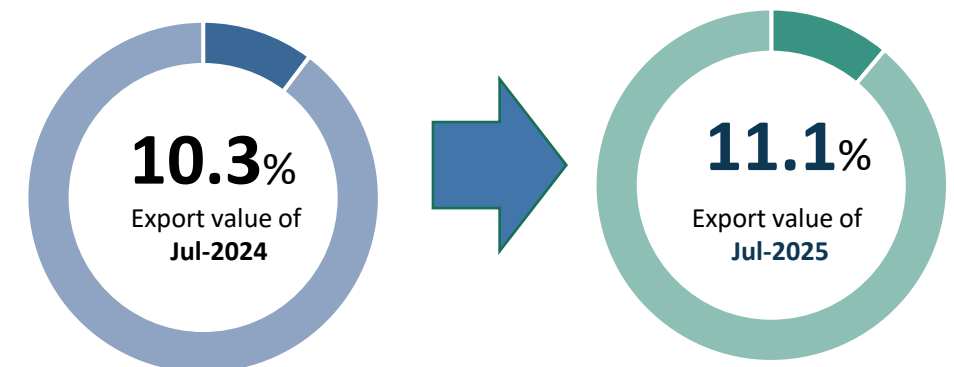
## Export results to the EU, Jul-2025



## Percentage of export value to the EU, Jul-2025



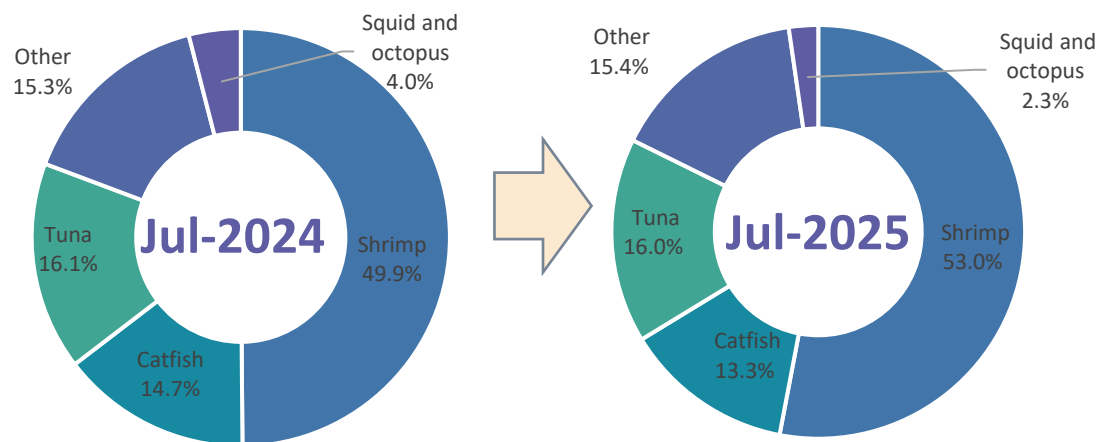
## Changes in percentage of export value to the EU, Jul-2025



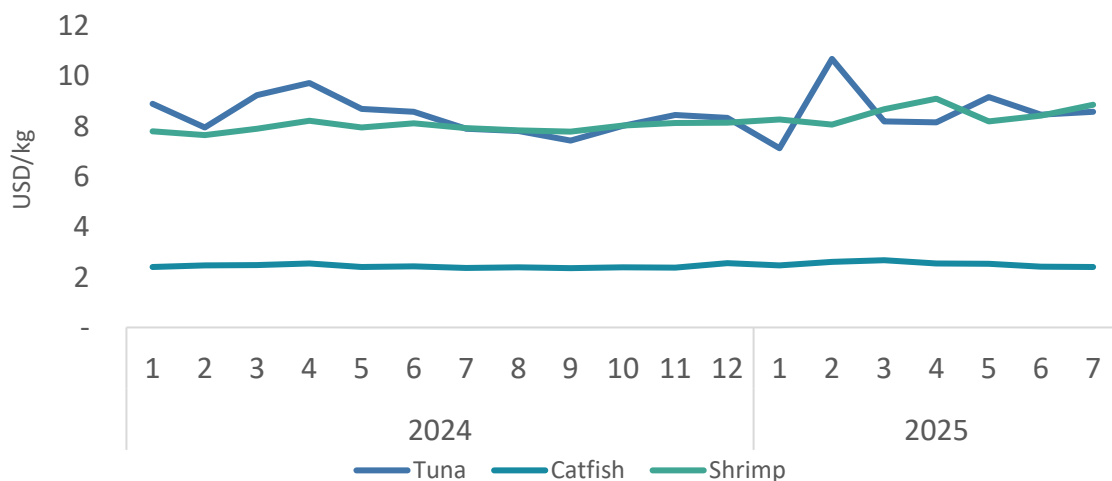


# SEAFOOD

## Structure of exports by products to the EU, Jul-2025



## Average export price to the EU, Jul-2025



## Structure of exports by products to the EU, Jul-2025



### Shrimp

Value: **57.1** mil. USD

Increase **14.5%** compared to Jun-2025

Increase **20.9%** compared to Jul-2024



### Catfish

Value: **14.3** mil. USD

Increase **12.4%** compared to Jun-2025

Increase **2.6%** compared to Jul-2024



### Tuna

Value: **17.3** mil. USD

Increase **13.2%** compared to Jun-2025

Increase **13.0%** compared to Jul-2024

### Tuna

The average export price in Jul-2025 is **8.6** USD/kg; increase **1.4%** compared to the previous month; and increase **8.5%** compared to the same month 2024

### Catfish

The average export price in Jul-2025 is **2.4** USD/kg; decrease **0.3%** compared to the previous month; and increase **1.9%** compared to the same month 2024

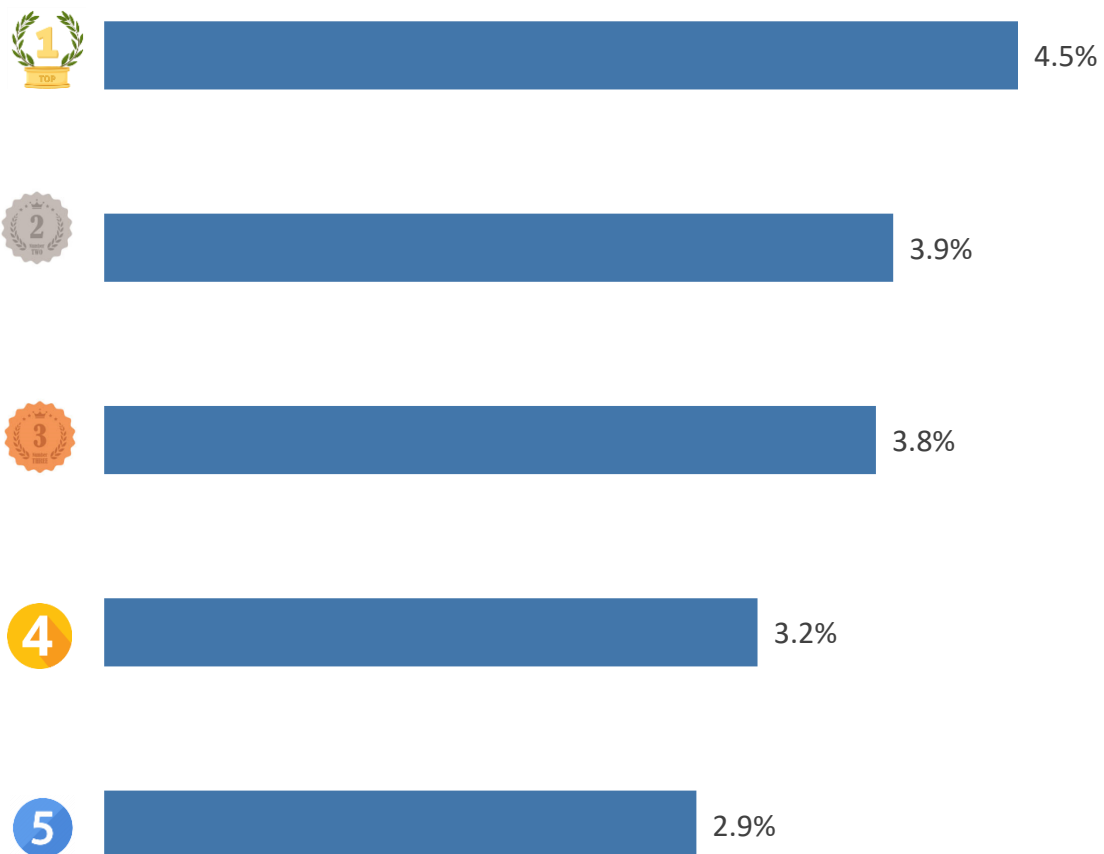
### Shrimp

The average export price in Jul-2025 is **8.2** USD/kg; increase **5.2%** compared to the previous month; and increase **11.7%** compared to the same month 2024

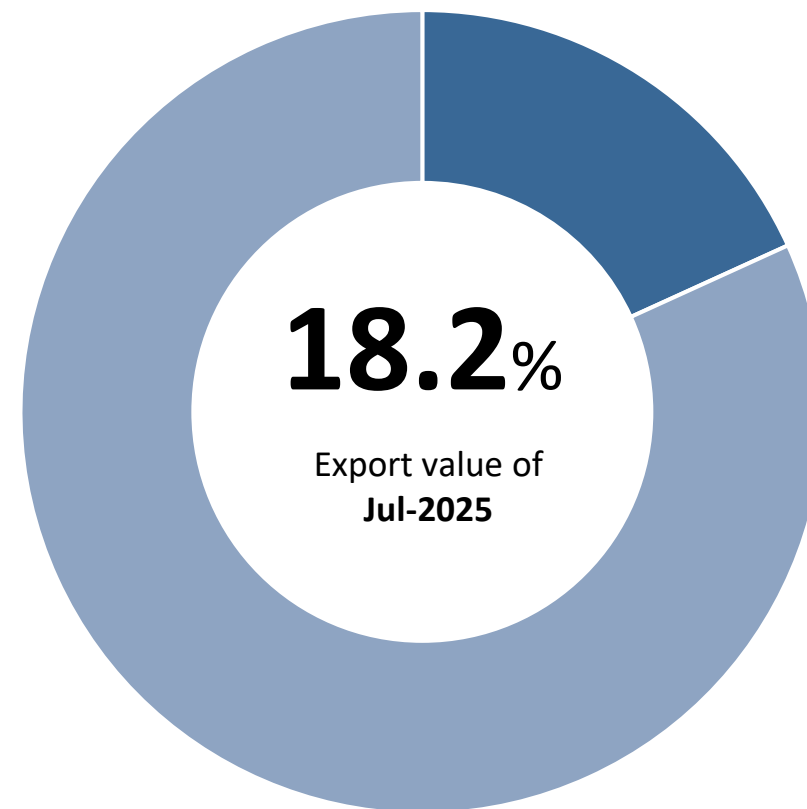


# SEAFOOD

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



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



## SPOTLIGHTS

### **Vietnam's tuna exports to Finland surges, opening opportunities in the Northern European market**

In the first seven months of 2025, Vietnam's tuna exports to Finland reached USD 2.5 million, marking a 49% increase compared to the same period last year. This growth is regarded as a positive signal, highlighting the growing importance of the Finnish market for Vietnamese tuna. Key exported products include canned, processed, and frozen tuna, which are highly competitive thanks to preferential tariffs under the EVFTA. Although Vietnam's tuna export volume to Finland remains modest, the country is considered a gateway for expanding market access to other Northern European countries such as Sweden and Denmark. This is largely due to the stable demand for convenient processed seafood products, rich in protein and suitable for modern consumption habits.

According to VASEP, to capitalize on opportunities in Northern Europe, Vietnamese enterprises should continue to improve quality, meet stringent sustainability requirements (MSC, IUU), and strengthen brand identity. These steps are crucial in enhancing competitiveness against other major suppliers such as Spain, Portugal, and Thailand.

*Source: Customs News Online*

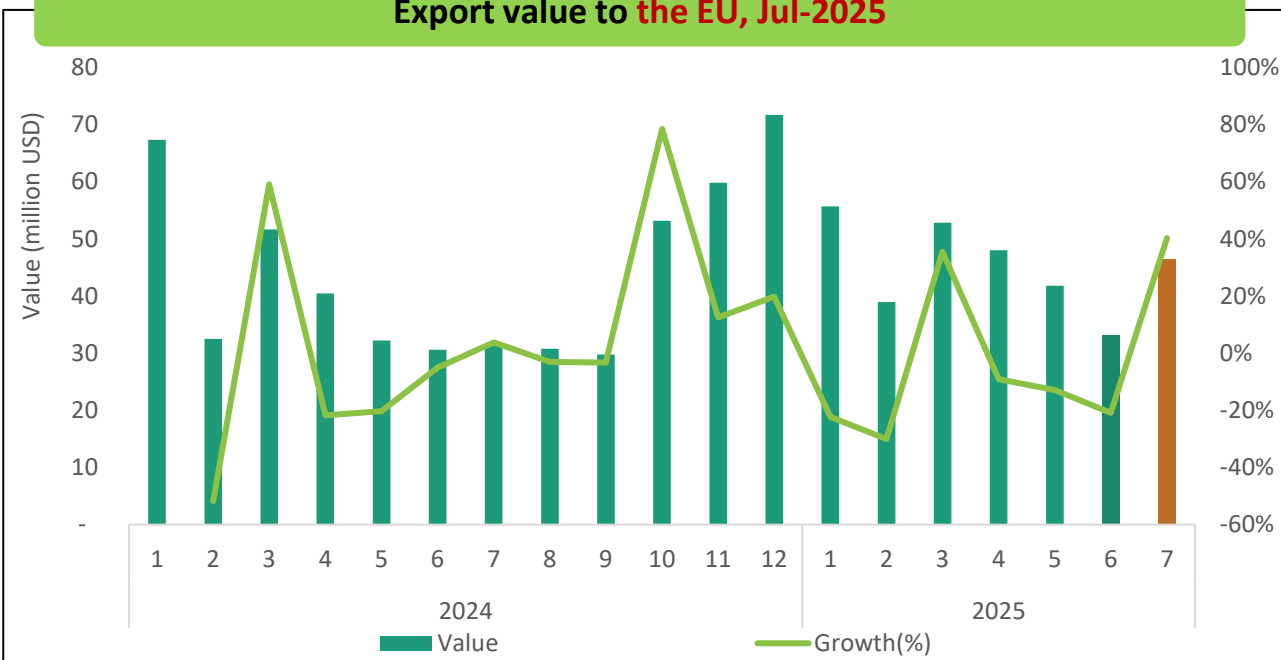




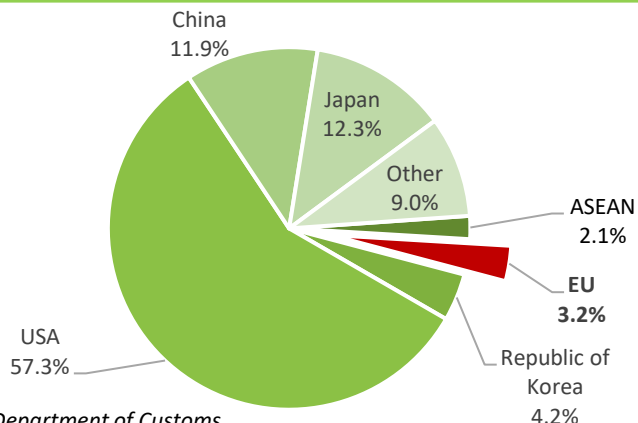


# WOOD AND WOODEN PRODUCTS

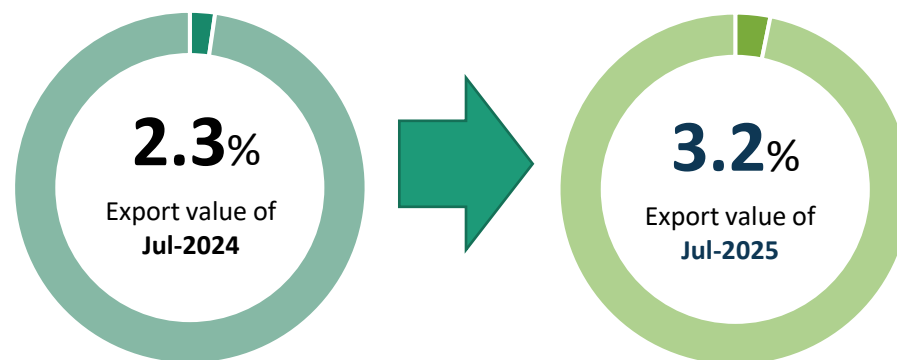
## Export value to the EU, Jul-2025



## Percentage of export value to the EU, Jul-2025



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



## Export results to the EU, Jul-2025

### VALUE



46

mil. USD

➤ Increase **40.3%** compared to Jun-2025

➤ Increase **46.3%** compared to Jul-2024

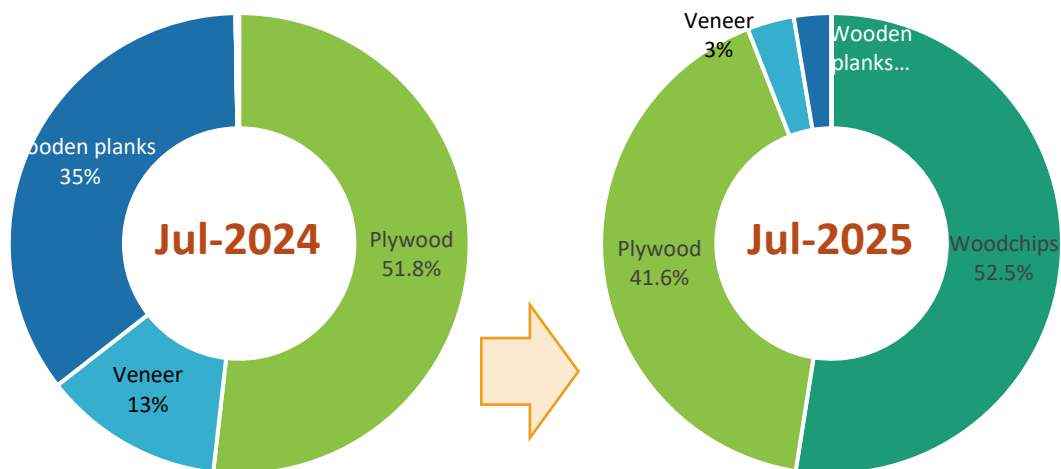
➤ **2.1 mil. USD** more than compared to monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **316.9** mil. USD, **59.6%** of total 2024.



# WOOD AND WOODEN PRODUCTS

## Structure of exports by products to the EU, Jul-2025



## Export results to the EU, Jul-2025



### Woodchips

Value: **8.5** mil. USD

**532** times more than compared to Jun-2025

Increase **N/A** compared to Jul-2024



### Plywood

Value: **6.7** mil. USD

Increase **44%** compared to Jun-2025

Increase **636%** compared to Jul-2024



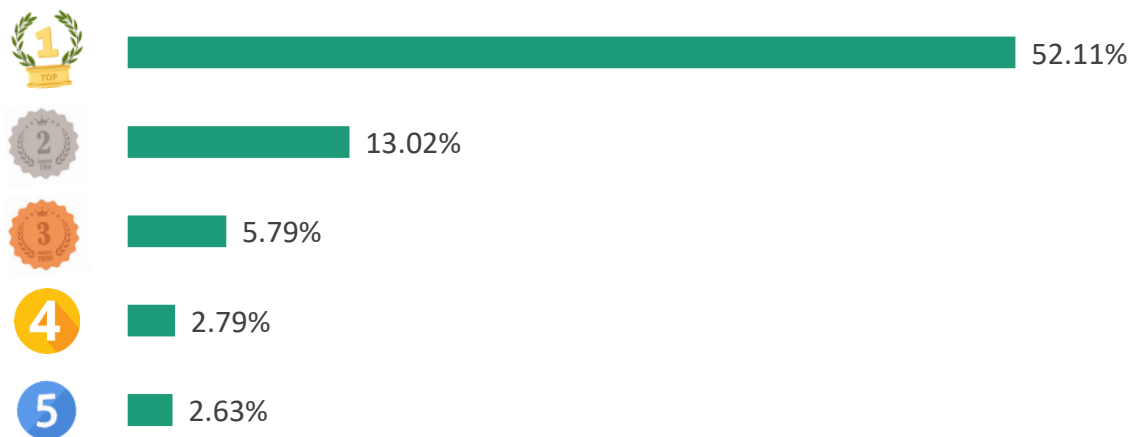
### Veneer

Value: **535.7** thousand USD

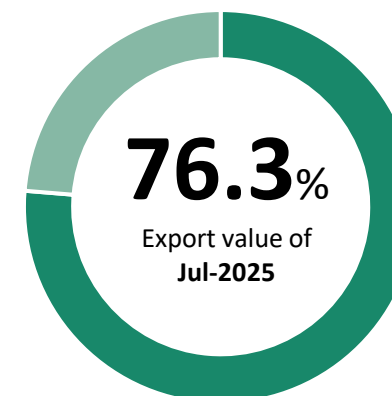
Decrease **21%** compared to Jun-2025

Increase **139%** compared to Jul-2024

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



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





## SPOTLIGHTS

Trade policy adjustments between the European Union (EU) and the United States in August 2025 have resulted in the import tariff of 15% for EU's commodities. However, sawnwood continues to benefit from a 0% Most-Favored-Nation (MFN) tariff rate until the United States concludes its Section 232 investigation in November 2025. In contrast, engineered wood products (EWPs) are currently subject to a 10% tariff, which may increase to 15% in the coming period. This is the key factor driving the differentiated effects of tariffs across wood product sub-groups.

The political agreement reached at the end of July 2025 by leaders of both sides has provided a framework for cooperation but has yet to carry legal effect. As a result, short-term trade prospects for wood products between the EU and the U.S. remain relatively stable, though still exposed to risks depending on the outcome of the Section 232 investigation. In addition, non-tariff barriers—particularly environmental regulations such as the EU Deforestation Regulation (EUDR)—are being incorporated into ongoing dialogues to ensure alignment with the evolving bilateral trade relationship.





# FRUITS AND VEGETABLES (EXPORT)

## Export volume and value to the EU, Jul-2025



## Export results to the EU, Jul-2025



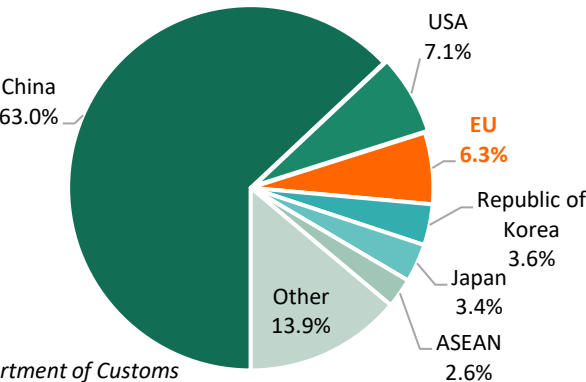
Increase **1.6%** compared to Jun-2025

Increase **82.8%** compared to Jul-2024

**22.1 mil. USD** more than compared to monthly average rate in 2024

Accumulated 7 months of 2025 reaches **283.2 mil.USD, 89.6%** of total 2024

## Percentage of export value to the EU, Jul-2025



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



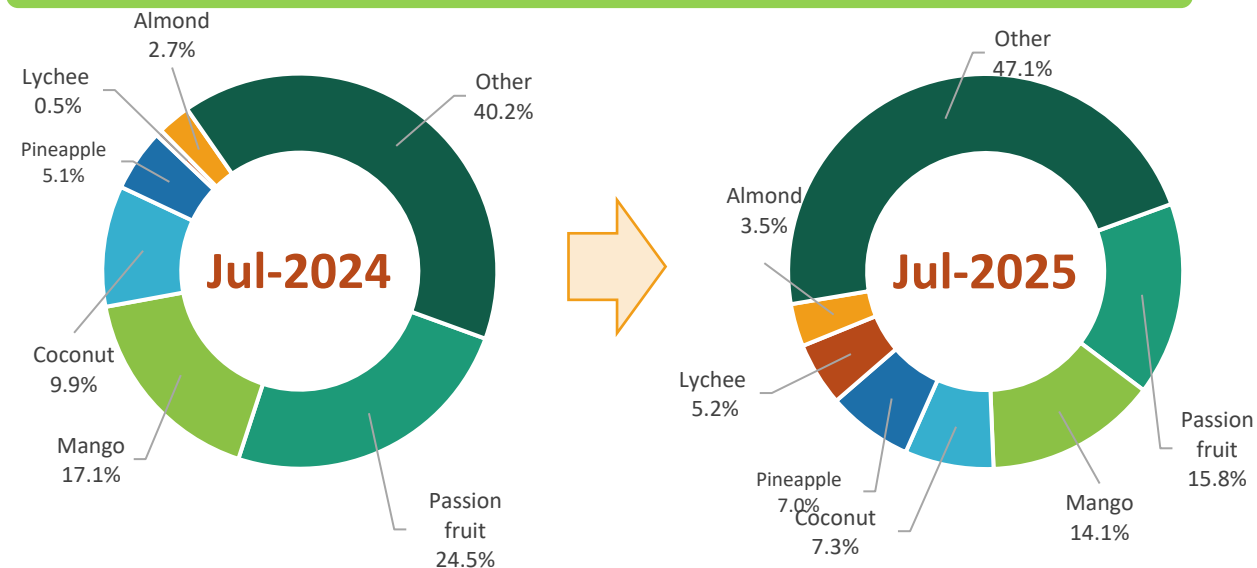
Source: Calculated from data of the Department of Customs





# FRUITS AND VEGETABLES (EXPORT)

## Structure of exports by products to the EU, Jul-2025



## Export results of some main products to the EU, Jul-2025



### Passion fruit

Value: **7.7** mil. USD

Decrease **53.0%** compared to Jun-2025

Increase **18.1%** compared to Jul-2024



### Mango

Value: **6.8** mil. USD

Increase **17.8%** compared to Jun-2025

Increase **51.0%** compared to Jul-2024



### Coconut

Value: **3.5** mil. USD

Decrease **9.4%** compared to Jun-2025

Increase **34.4%** compared to Jul-2024



### Pineapple

Value: **3.4** mil. USD

Decrease **4.2%** compared to Jun-2025

Increase **151.6%** compared to Jul-2024



### Lychee

Value: **2.5** mil. USD

Increase **101.2%** compared to Jun-2025

**18.6 times more than** compared to Jul-2024



### Almond

Value: **1.7** mil. USD

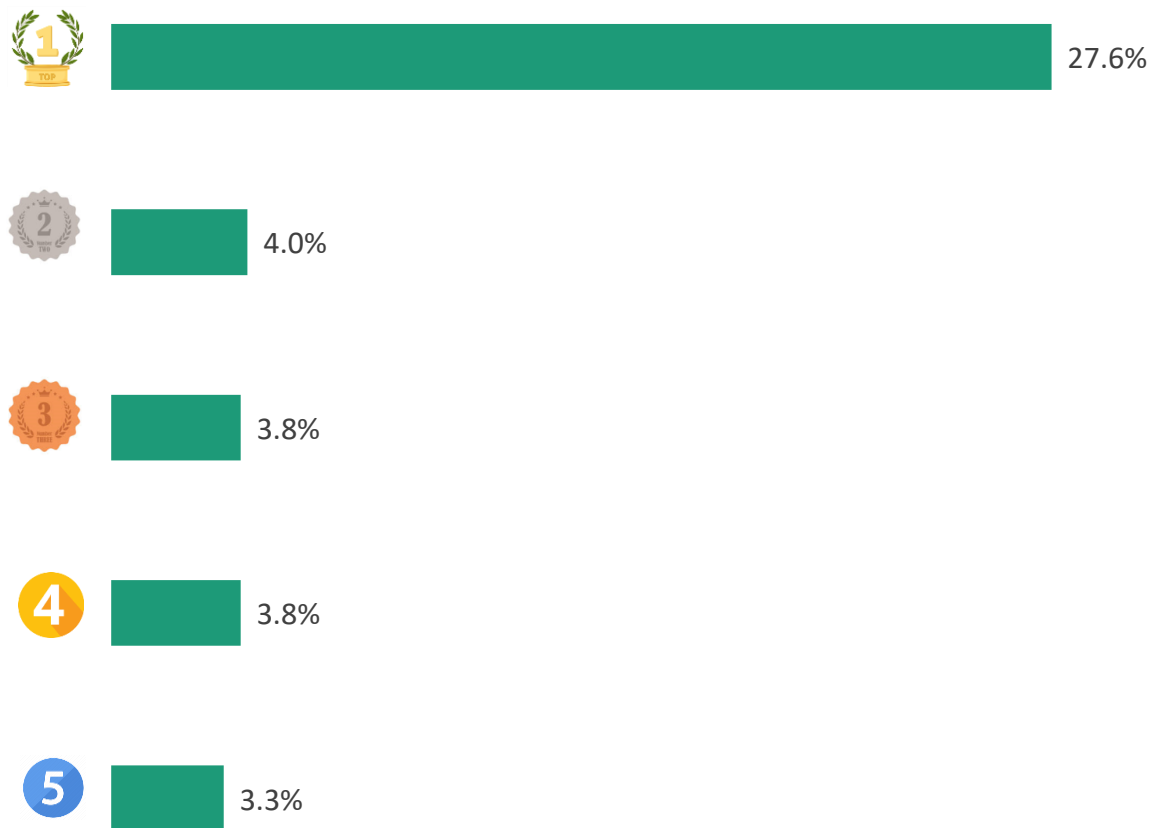
Decrease **6.8%** compared to Jun-2025

Increase **134.9%** compared to Jul-2024

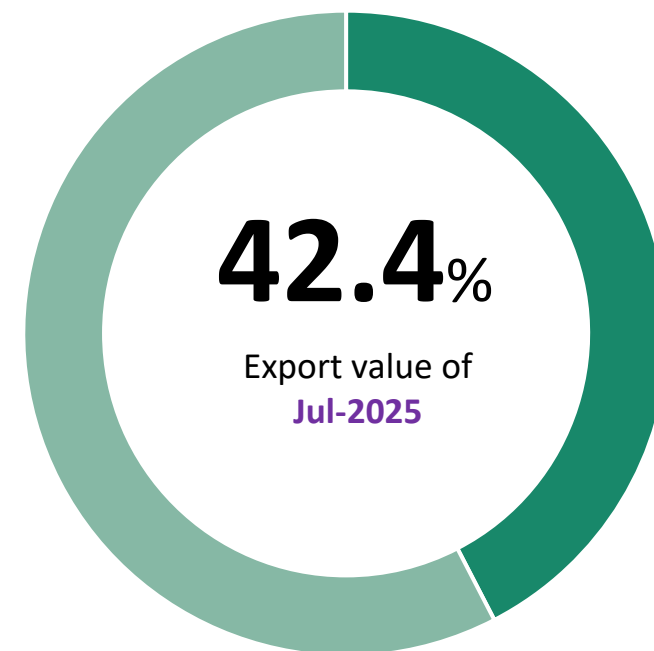


# FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to the EU, Jul-2025



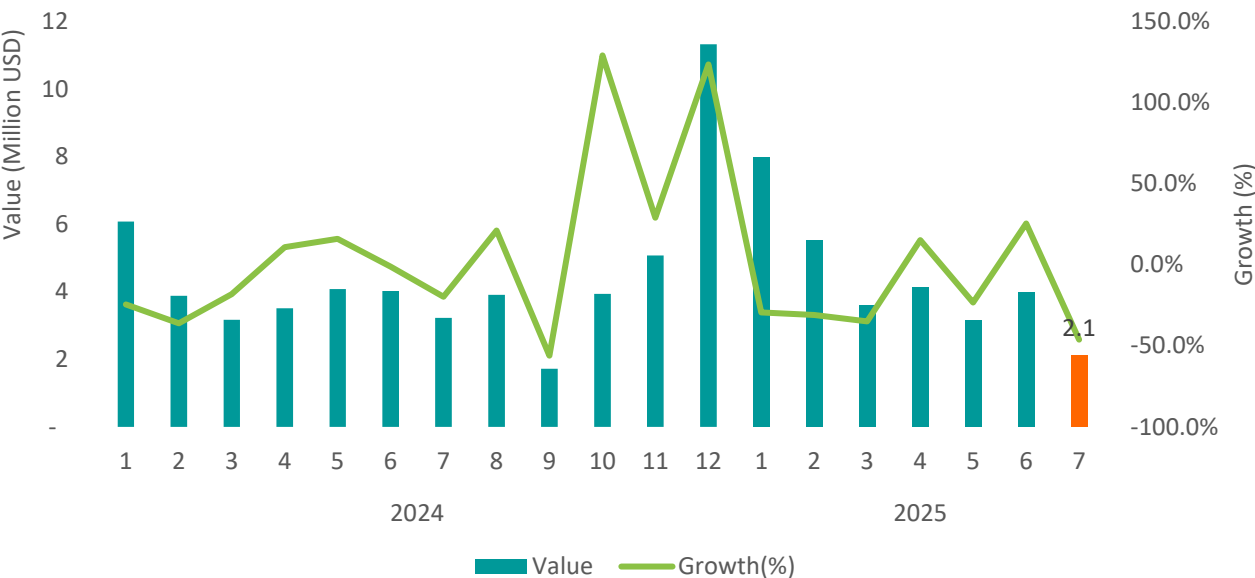
Value ratio of TOP 5 export enterprises to the EU, Jul-2025





# FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the EU, Jul-2025



Import results from the EU, Jul-2025

VALUE  
**2.1**  
mil. USD



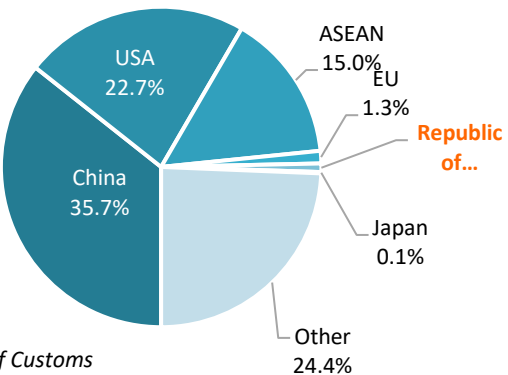
Decrease **43.6%** compared to Jun-2025

Decrease **34.1%** compared to Jul-2024

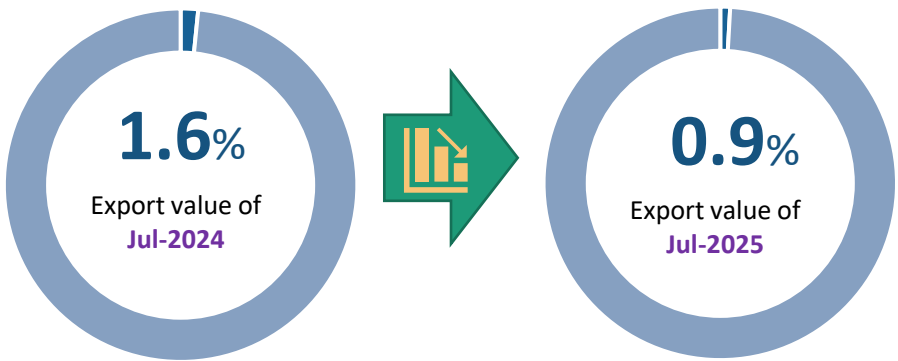
**2.4 mil. USD** less than compared to monthly average rate in 2024

Accumulated 7 months of 2025 reaches **30.5 mil. USD**, **56.5%** of total 2024.

Percentage of import value from the EU, Jul-2025



Changes in percentage of import value from the EU, Jul-2025

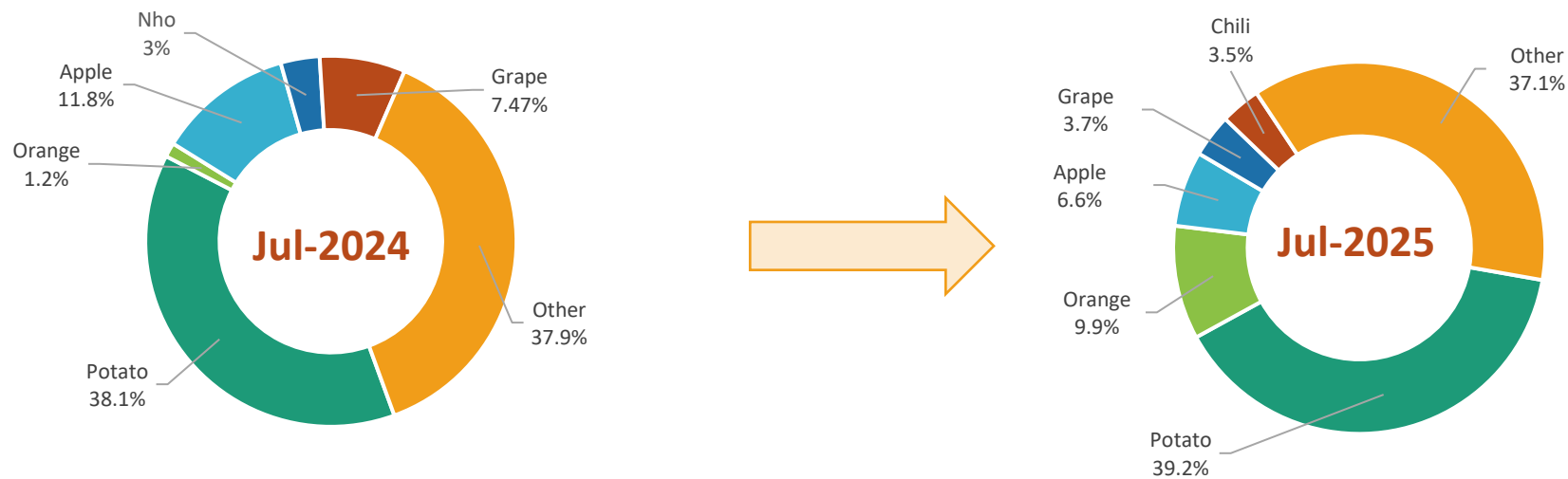


Source: Calculated from data of the Department of Customs



# FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the EU, Jul-2025



Import results of some main products from the EU, Jul-2025



## Potato

Value: **835** thousand USD  
 Decrease **53.8%** compared to Jun-2025  
 Decrease **32.2%** compared to Jul-2024



## Orange

Value: **210.8** thousand USD  
 Increase **240.0%** compared to Jun-2025  
 Increase **424.4%** compared to Jul-2024



## Apple

Value: **139.6** thousand USD  
 Decrease **49.9%** compared to Jun-2025  
 Decrease **63.4%** compared to Jul-2024

Source: Calculated from data of the Department of Customs



## SPOTLIGHTS

### EU expands market access for Moldova's fruit exports

The European Union (EU) has expanded market access for Moldova's fruit exports through adjustments to the Deep and Comprehensive Free Trade Area (DCFTA) agreement. Under the new provisions, export quotas for plums, apples, fresh grapes, and cherries will be increased, while products such as grape juice, tomatoes, and garlic will be fully liberalized, with the exception of certain technical regulations applied to tomatoes.

Moldova will be required to align its production standards with European norms, and safeguard mechanisms will be activated if imports are found to disrupt the domestic market. This amendment replaces the temporary trade measures that expired on 24 July 2025.

*Source: Freshplaza.com*



## SPOTLIGHTS



### **Spain's green asparagus sector faces indirect pressure from the U.S. tariffs**

The green asparagus sector in Granada, Spain—although not directly exports to the United States—may face indirect impacts from U.S. tariffs imposed on major exporters such as Peru and Mexico. Shipments from these countries could be redirected to Europe, potentially leading to oversupply during Spain's harvest season and exerting downward pressure on local producers and exporters.

Granada is currently one of the largest green asparagus-producing regions in Europe, with tens of thousands of hectares under cultivation. The main harvest takes place from March to June, followed by a smaller crop in September and October. The concrete effects will become clearer as the harvest season progresses, illustrating how global trade policies can influence regions not directly engaged in bilateral trade.

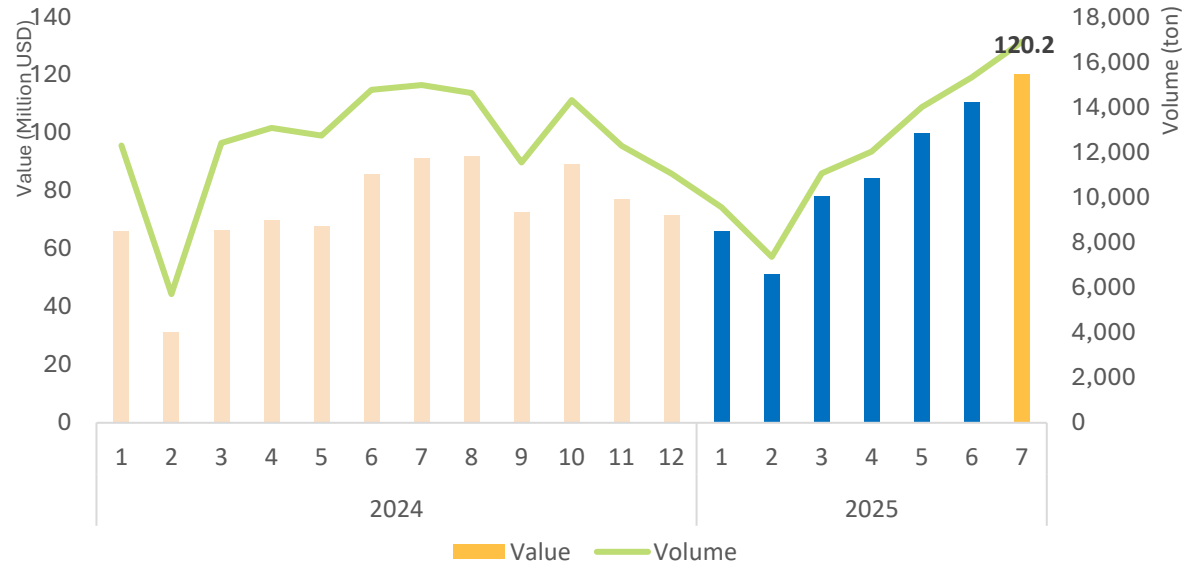
Source: *Fructidor.com*





# CASHEW NUTS

## Export volume and value to the EU, Jul-2025



## Export results to the EU, Jul-2025

### VALUE

**120.2** mil. USD

↗ Increase **8.6%** compared to Jun-2025

↗ Increase **31.6%** compared to Jul-2024

↑ **46.8 mil. USD** more than compared to monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **611 mil.USD**, **69%** of total 2024

### VOLUME

**16.9** thousand tons

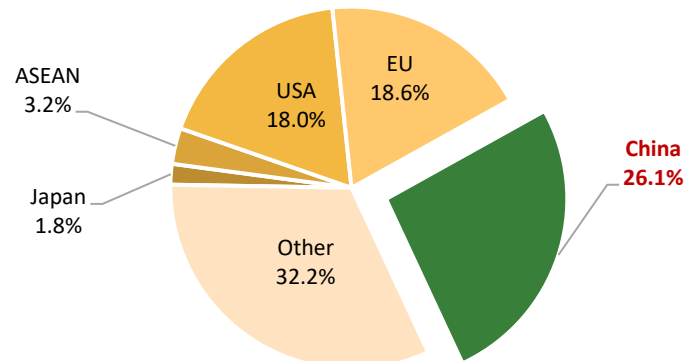
↗ Increase **10.3%** compared to Jun-2025

↗ Increase **12.8%** compared to Jul-2024

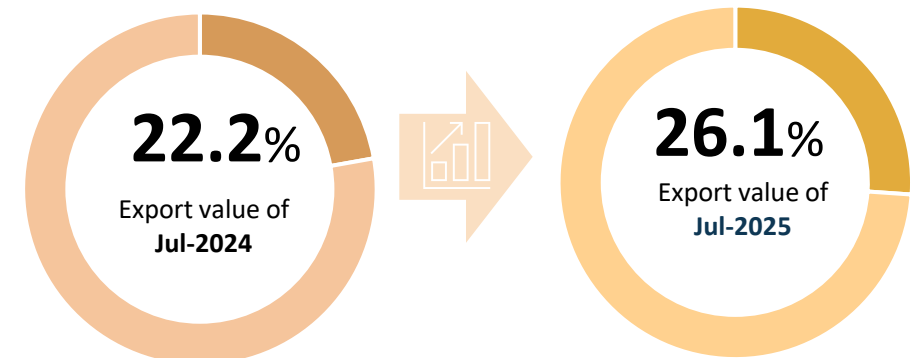
↑ **4.4 thousand tons** more than compared to monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **86 thousand tons**, **58%** of total 2024

## Percentage of export value to the EU, Jul-2025



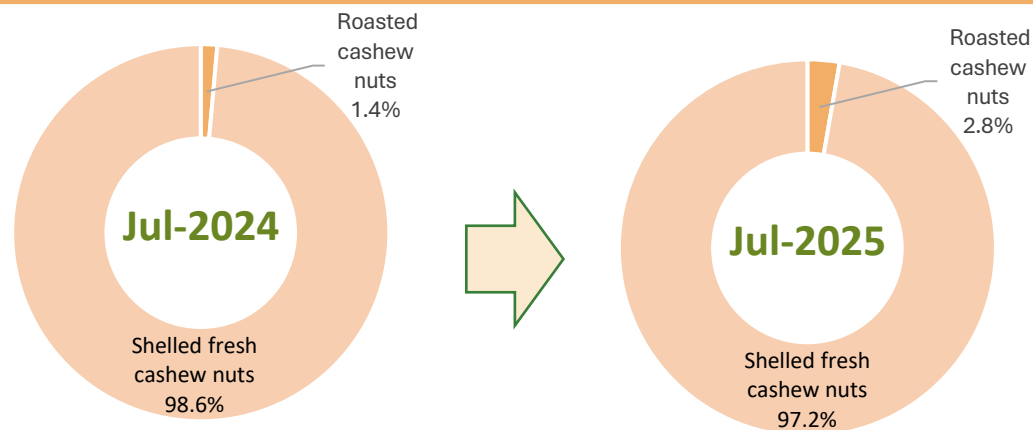
## Changes in percentage of export value to the EU, Jul-2025



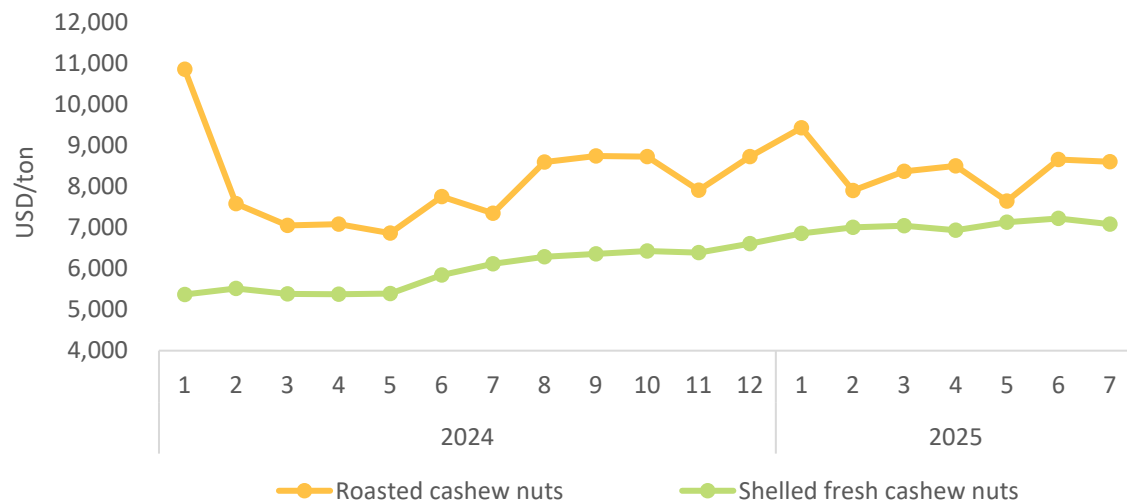


# CASHEW NUTS

## Structure of exports by products to the EU, Jul-2025



## Average export price to the EU, Jul-2025



## Export results to the EU, Jul-2025



### Shelled fresh cashew nuts

Value: **116.9** mil. USD

Increase **8.0%** compared to Jun-2025

Increase **30%** compared to Jul-2024



### Roasted cashew nuts

Value: **3.3** mil. USD

Increase **31%** compared to Jun-2025

Increase **157%** compared to Jul-2024

### Shelled fresh cashew nuts

The average export price in Jul-2025 is **7.080** USD/ton; decrease **1.9%** compared to the previous month; and increase **15.8%** compared to the same month 2024

### Roasted cashew nuts

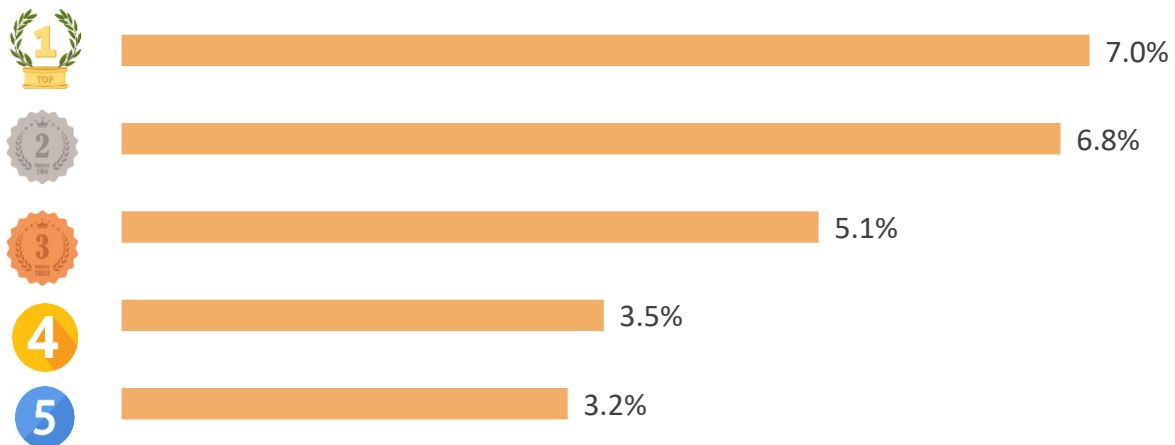
The average export price in Jul-2025 is **8.594** USD/ton; decrease **0.6%** compared to the previous month; and increase **17.0%** compared to the same month 2024



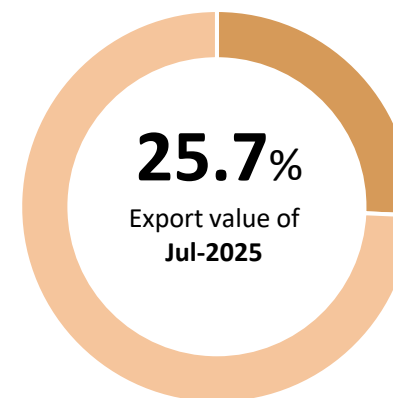


# CASHEW NUTS

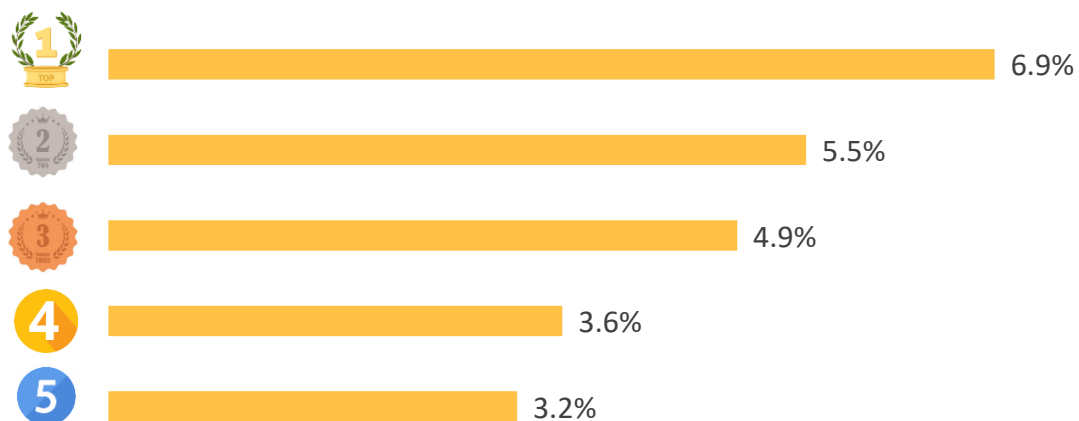
## TOP 5 export enterprises by value to the EU, Jul-2025



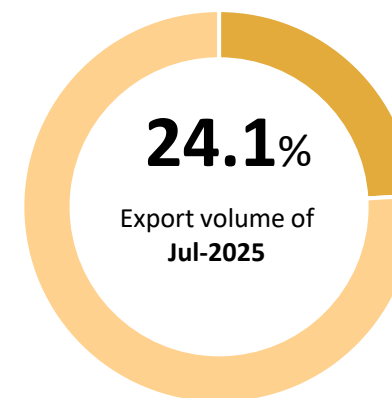
## Value ratio of TOP 5 export enterprises to the EU, Jul-2025



## TOP 5 export enterprises by volume to the EU, Jul-2025



## Volume ratio of TOP 5 export enterprises to the EU, Jul-2025



## Indian cashew provides bioenergy for Denmark's maritime transport sector



Traditionally recognized as a premium food product, Indian cashew nut has now moved beyond the food sector to become a source of bioenergy for Denmark's maritime sector, contributing to carbon emission reductions. A key feature of cashew shells, often considered difficult to utilize, lies in their potential to be converted into biofuel. This transformation opens up new opportunities for the shipping industry to adopt sustainable energy alternatives.

This innovation further strengthens India's growing role in global agricultural exports, highlighting the increasingly close integration of its supply chains. For Indian farmers and exporters, the ability to capture value from by-products such as cashew shells not only generates additional profits but also encourages the adoption of sustainable practices, ensuring long-term economic and environmental benefits.



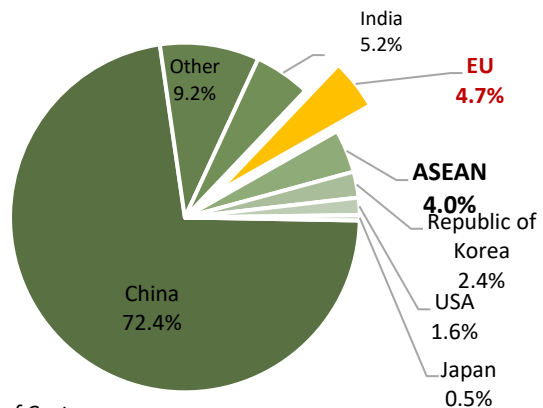


# RUBBER

## Export volume and value to the EU, Jul-2025



## Percentage of export value to the EU, Jul-2025



## Export results to the EU, Jul-2025

### VALUE

**15.6** mil. USD

↗ Increase **63%** compared to Jun-2025

↗ Increase **18%** compared to Jul-2024

↑ **0.8 mil. USD** more than compared to monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **69 mil. USD, 38.9%** of total 2024

### VOLUME

**8.668** tons

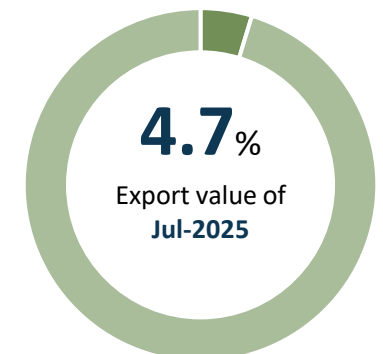
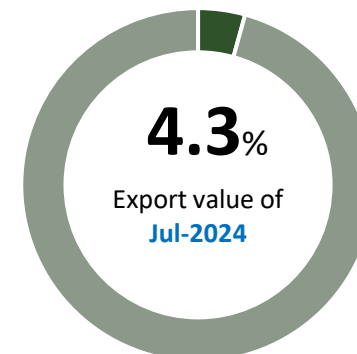
↗ Increase **67%** compared to Jun-2025

↗ Increase **16%** compared to Jul-2024

↑ **0.3 thousand tons** more than compared to monthly average rate in 2024

❖ Accumulated 7 months of 2025 reaches **36 thousand tons, 36.2%** of total 2024

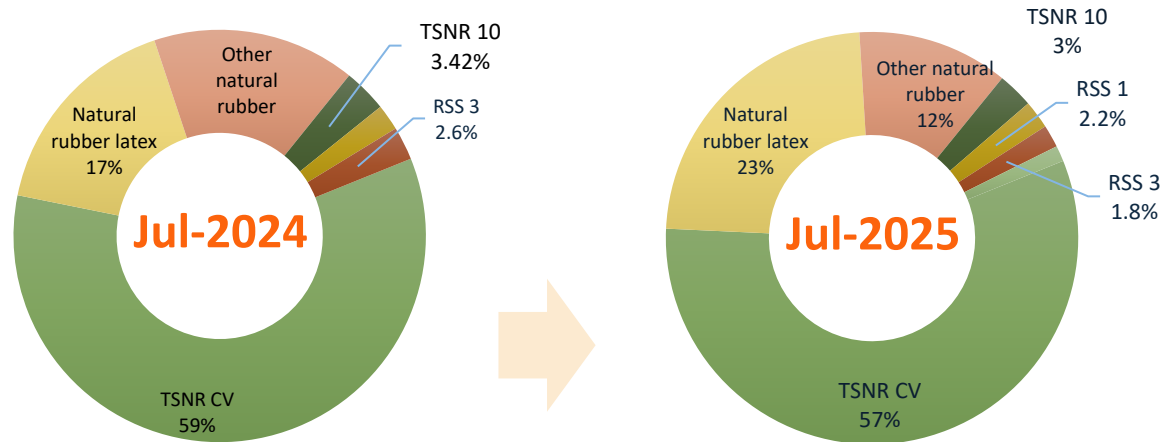
## Changes in percentage of export value to the EU, Jul-2025



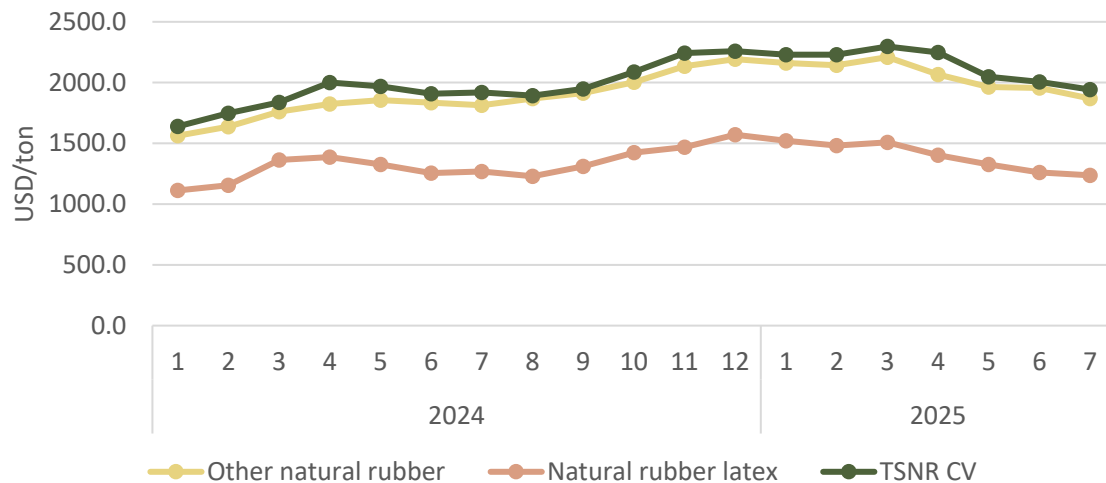


# RUBBER

## Structure of exports by products to the EU, Jul-2025



## Average export price to the EU, Jul-2025



## Kết quả xuất khẩu cao su sang thị trường EU, Jul-2025



### Other natural rubber

Value: **3.6** mil. USD

Increase **83%** compared to Jun-2025

Increase **91%** compared to Jul-2024



### TSNR CV

Value: **8.9** mil. USD

Increase **59%** compared to Jun-2025

Increase **31%** compared to Jul-2024



### Natural rubber latex

Value: **1.8** mil. USD

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

Increase **1.8%** compared to Jul-2024

### Other natural rubber

The average export price in Jul-2025 is **1.869** USD/ton; decrease **4.5%** compared to the previous month; and decrease **0.2%** compared to the same month 2024

### TSNR CV

The average export price in Jul-2025 is **1.944** USD/ton; decrease **3.1%** compared to the previous month; and increase **0.6%** compared to the same month 2024

### Natural rubber latex

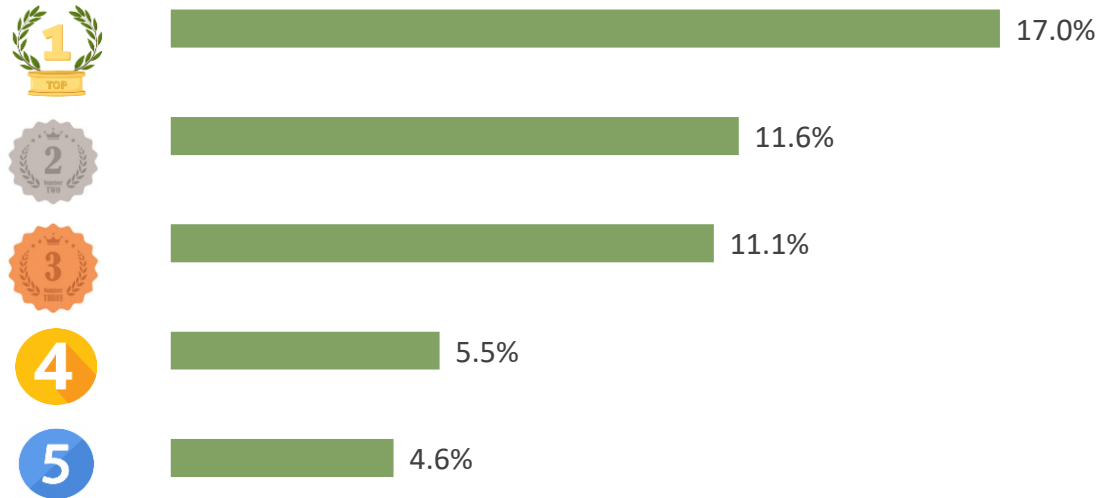
The average export price in Jul-2025 is **1.237** USD/ton; decrease **2.0%** compared to the previous month; and decrease **1.3%** compared to the same month 2024



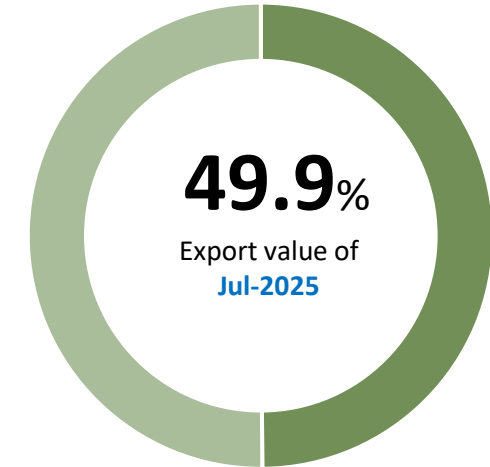


# RUBBER

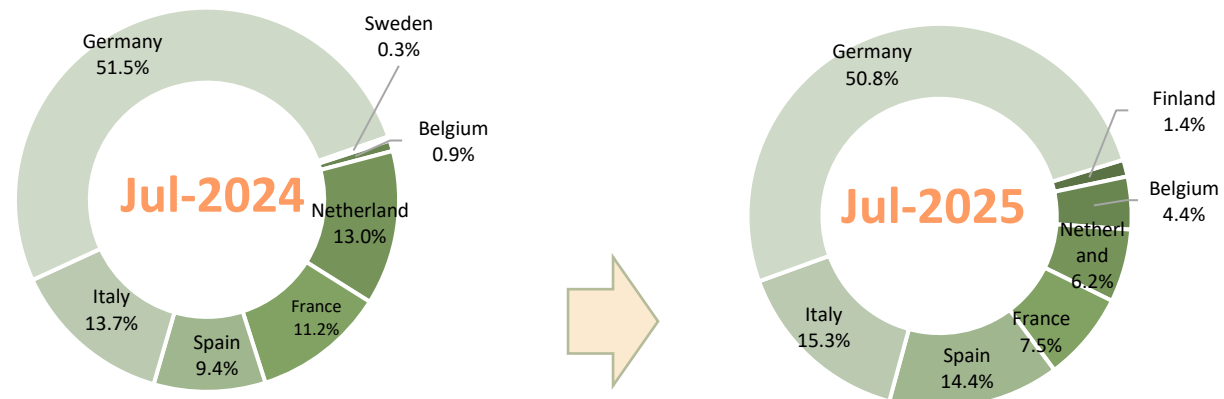
## TOP 5 export enterprises by value to the EU, Jul-2025



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



## Changes in percentage of export value by countries, Jul-2025





For feedback, please send to:

**Center for Information and Services in Agriculture and Environment  
(AGREINFOS)**

Institute of Strategy and Policy on Agriculture and Environment

Address: *16 Thuy Khue, Tay Ho Ward, Ha Noi city*

Email: [thongtinhitruong@ipsard.gov.vn](mailto:thongtinhitruong@ipsard.gov.vn); [info@agro.gov.vn](mailto:info@agro.gov.vn)

Website: <http://agro.gov.vn/>

