



ISPAE



Volume: 9/2025



MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

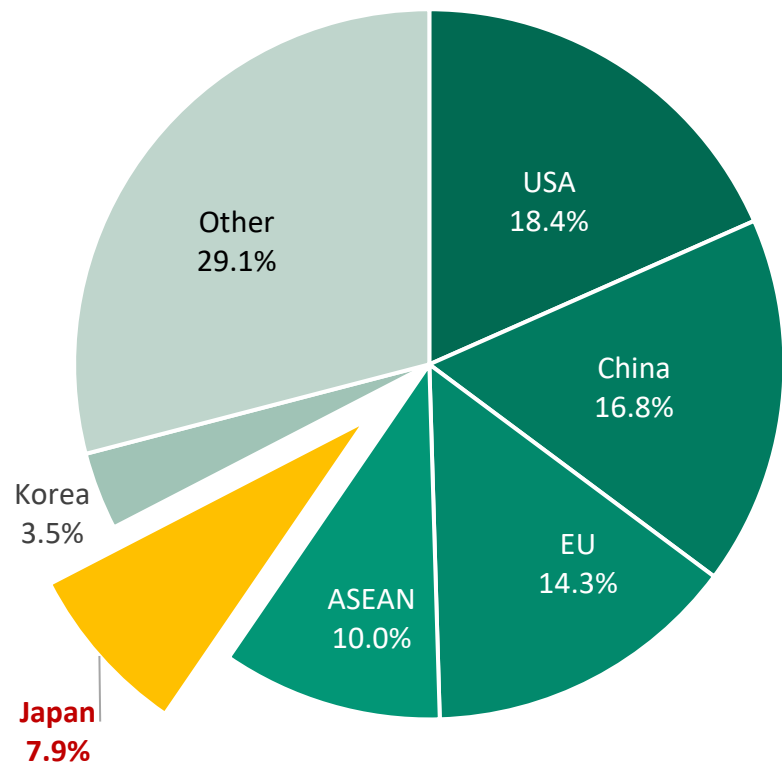
**FROM VIETNAM TO
JAPAN MARKET**

Prepared by: **AGREINFOS**



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

Share of AFF product export to Japan in Aug-2025

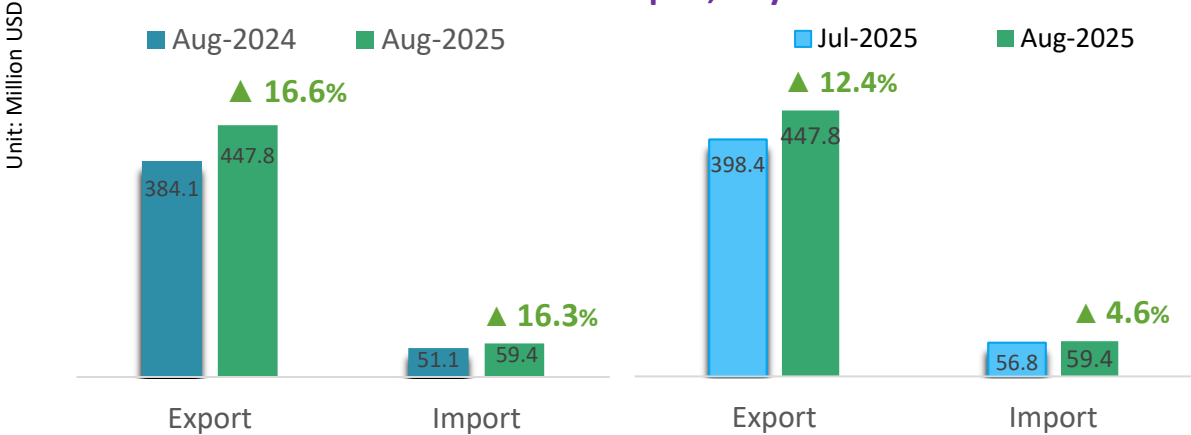


Changes in the share of AFF product export to Japan in Aug2025 compared to July-2025 and Aug-2024

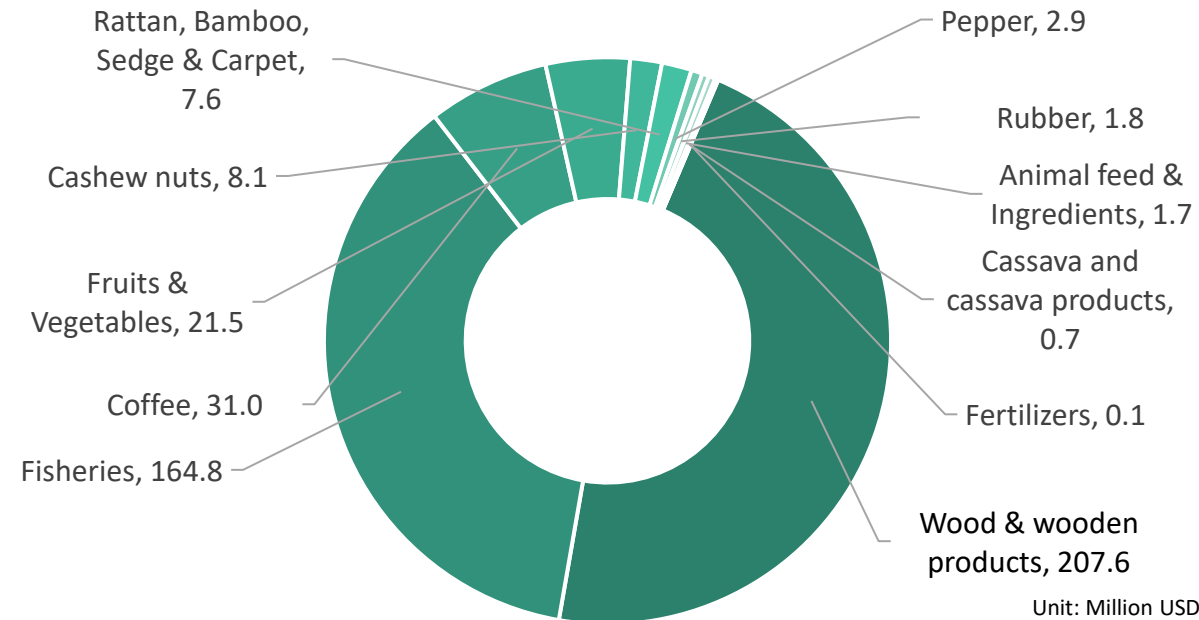
Market	Export value (million USD)	Compared to July-2025	Compared to Aug-2024
USA	842	▼ 3.6%	▲ 0.7%
China	770	▼ 1.0%	▼ 2.2%
EU	657	▲ 2.1%	▲ 2.5%
ASEAN	459	▲ 1.8%	▼ 3.7%
Japan	360	▲ 0.2%	▲ 1.2%
Korea	162	▼ 0.5%	▼ 0,1%
Total export	4,581		

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

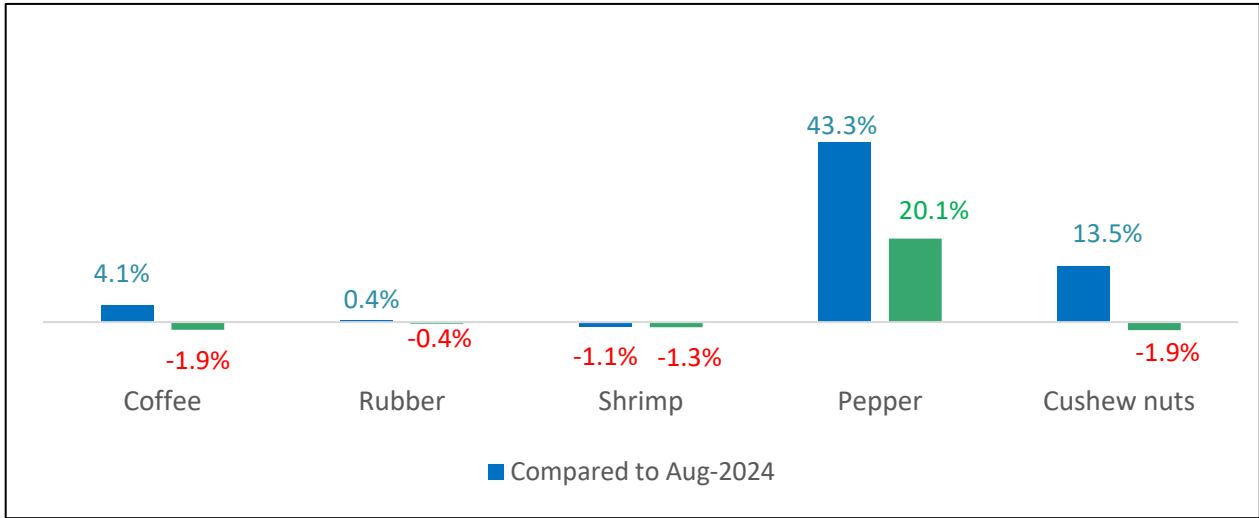
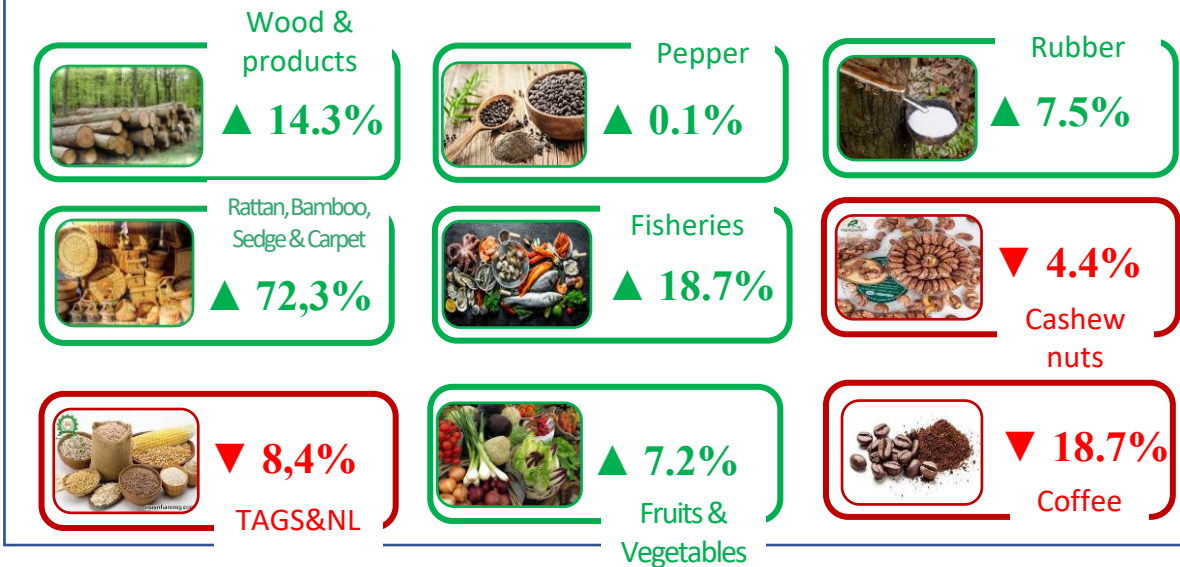
AFF product import-export value between Viet Nam and Japan, July-2025



Key AFF product export value to Japan, July-2025



Changes in key AFF product export value to Japan in July-2025 compared to June-2025



Japan's Industry Output Declines for the Second Consecutive Month

In August 2025, Japan's industry production fell by 1.2% compared to the previous month, marking the second consecutive month of decline, mainly due to the prolonged tariff policy of the U.S. President Donald Trump, which has made Japanese businesses more careful about the global economic outlook.

The metal and electronic equipment industries face the most serious impacts,

with output drops exceeding initial forecasts. Although Tokyo signed the agreement with Washington to maintain export tariffs with Japanese goods, including automobiles at 15%, the U.S. and Japan trade tensions continue to place pressure on the economy.

Nevertheless, the short-term production prospects show positive signs. Japanese manufacturers expect that output will rise by 4.1% in September and 1.2% in October, reflecting renewed optimism for a gradual

recovery in the industry sector in the coming months.



Source: japantimes.co.jp

Japan Willing to Share Experiences in Smart Agriculture with Vietnam

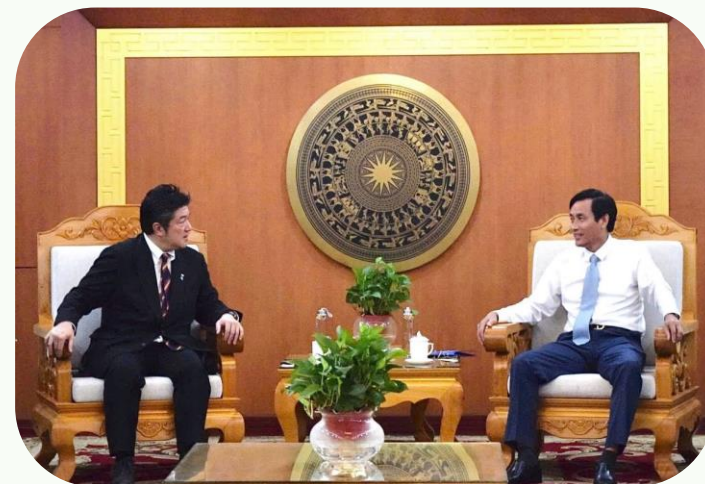
On September 16 in Hanoi, Deputy Minister of Agriculture and Environment – Mr. Trần Quý Kiên has a meeting with Mr. Yasuhide Nakayama, former Minister of Defense of Japan.

During the meeting, the Deputy Minister affirmed that the Vietnam-Japan relationship has developed deeply and substantively in

recent years, of which cooperation in agriculture and environment is considered as a highlight closely tied to the sustainable development goals of both nations. Mr. Yasuhide Nakayama stated that Japan is ready to share their experience and provide technical support in terms of agricultural product preservation, long-term food storage, and sustainable value chain development.

Both sides agreed to promote comprehensive cooperation between two countries,

particularly in green agriculture, environmental protection, and sustainable development.



Source: nongnghiepmoitruong.vn





WOOD AND WOODEN PRODUCTS

Export value to Japan, Aug-2025



Export results to Japan, Aug-2025

VALUE



207

million USD

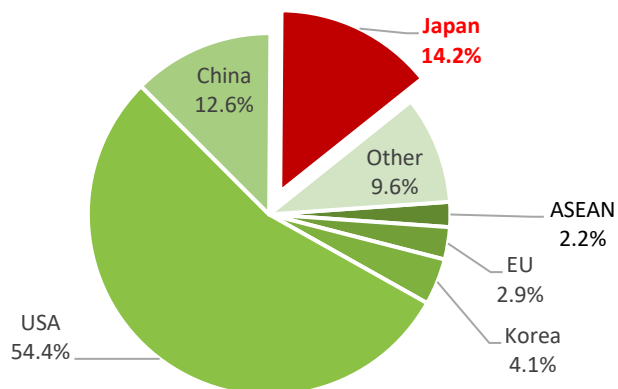
➤ Increase **14.3%** compared to Jul-2025

➤ Increase **23.3%** compared to Aug-2024

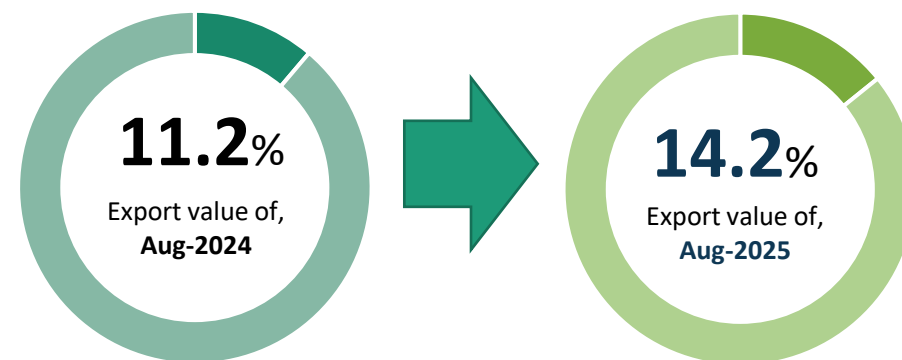
➤ **62.0 million USD** more than the monthly average rate in 2024

❖ Accumulated 8 months of 2025 reaches **1.4** billion USD, **80.5%** of total 2024

Percentage of export value to Japan, Aug-2025



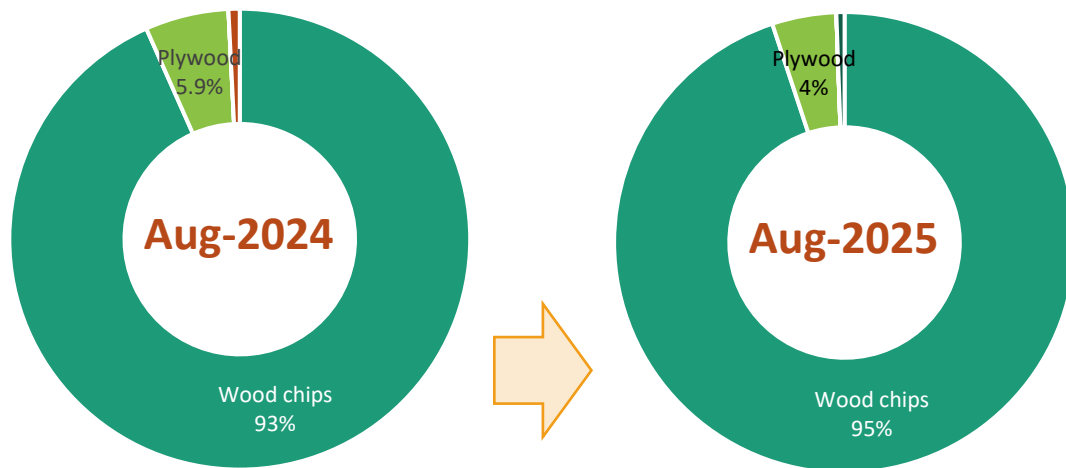
Changes in percentage of export value to Japan, Aug-2025





WOOD AND WOODEN PRODUCTS

Structure of exports by products to Japan, Aug-2025



Export results to Japan, Aug-2025



Wood chips

Value: **160.0** million USD

Increase **21%** compared to Jul-2025

Increase **39%** compared to Aug-2024



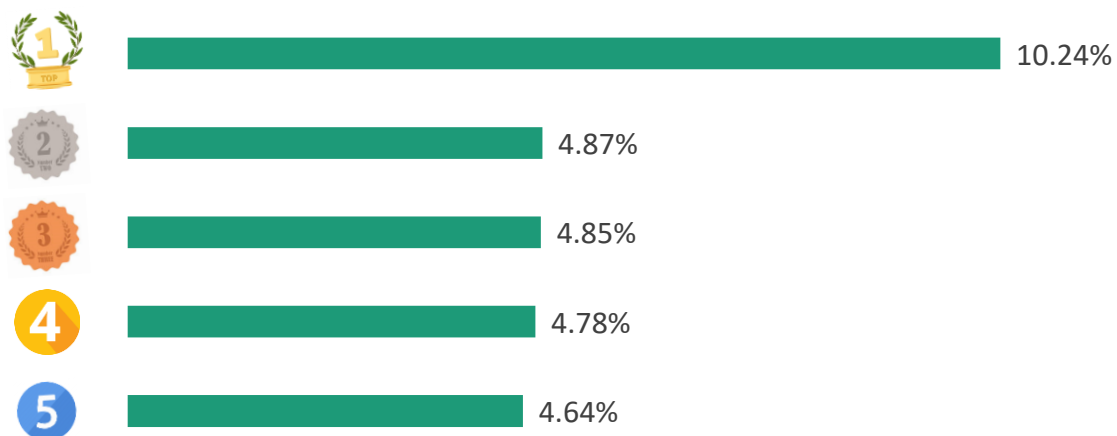
Plywood

Value: **7.7** million USD

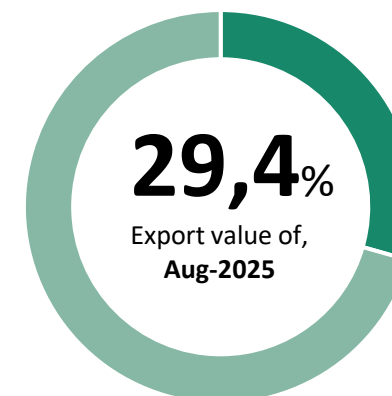
Increase **18%** compared to Jul-2025

Increase **5%** compared to Aug-2024

TOP 5 export enterprises by value to Japan, Aug-2025



Value ratio of TOP 5 export enterprises to Japan, Aug-2025



WOOD AND WOODEN PRODUCTS



SPOTLIGHTS

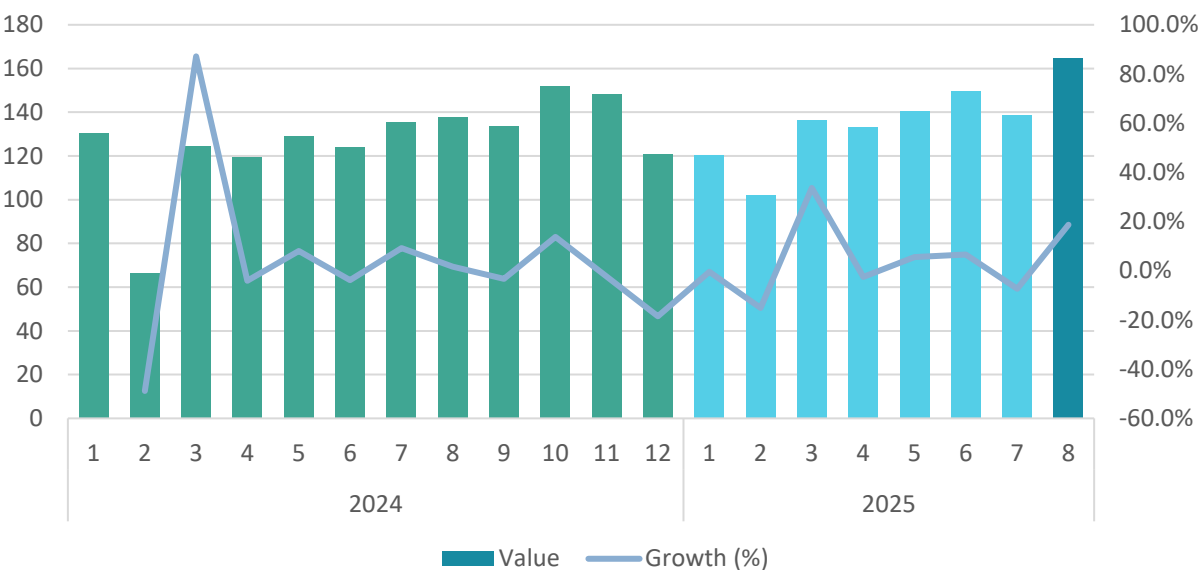
Japan's Ministry of Agriculture, Forestry and Fisheries announced plans to revise the Japan Agricultural Standards (JAS) labeling standards – an important national certification that ensures quality and technical safety for wood products. Accordingly, this agency will completely ban using hand-stamped. Instead, the new regulation will require the adoption of traceability methods such as inkjet printing or labeling. The action was made to restore market confidence after a scandal related to the unauthorized use of the JAS label last year.

In terms of macroeconomics, the Bank of Japan (BoJ) kept its policy of unchanged interest rate, while consumer inflation in August slowed to 2.7%. However, one factor makes great pressure on the market is that the cost of building housing, according to a government survey, has increased by as much as 30% over the past five years, directly affecting consumer affordability and demand.

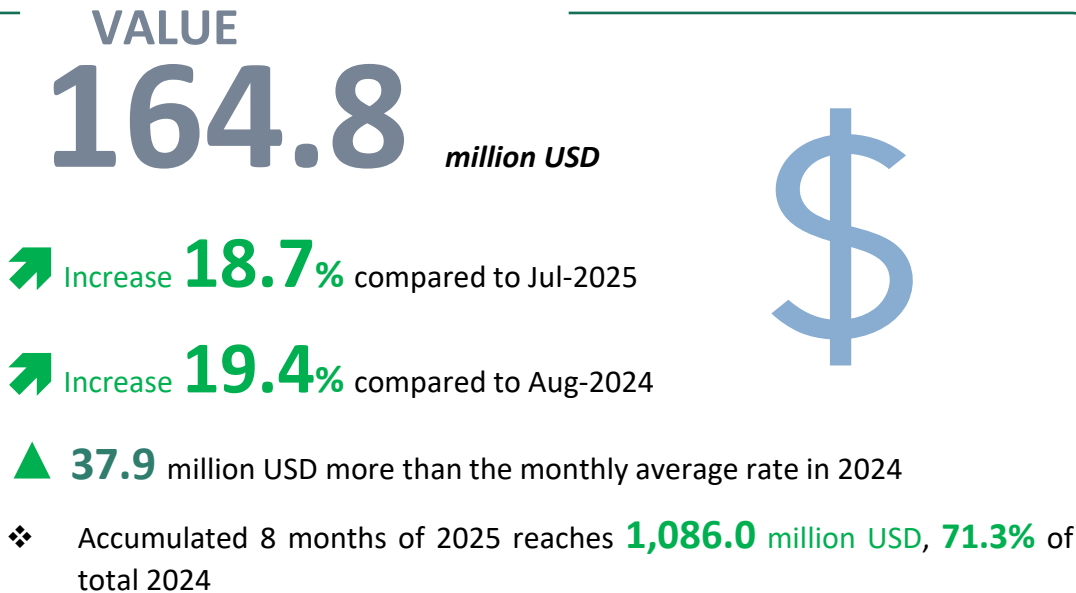


FISHERIES

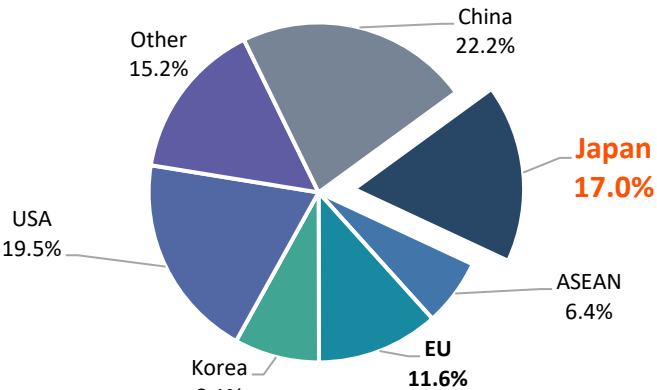
Export value to Japan, Aug-2025



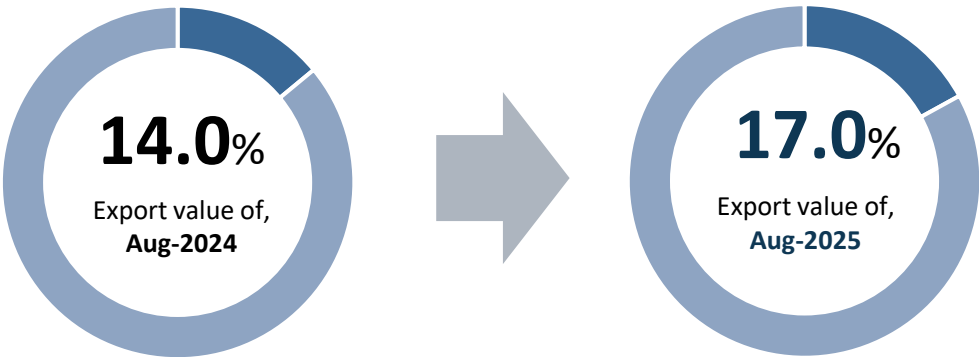
Export results to Japan, Aug-2025



Percentage of export value to Japan, Aug-2025



Changes in percentage of export value to Japan, Aug-2025

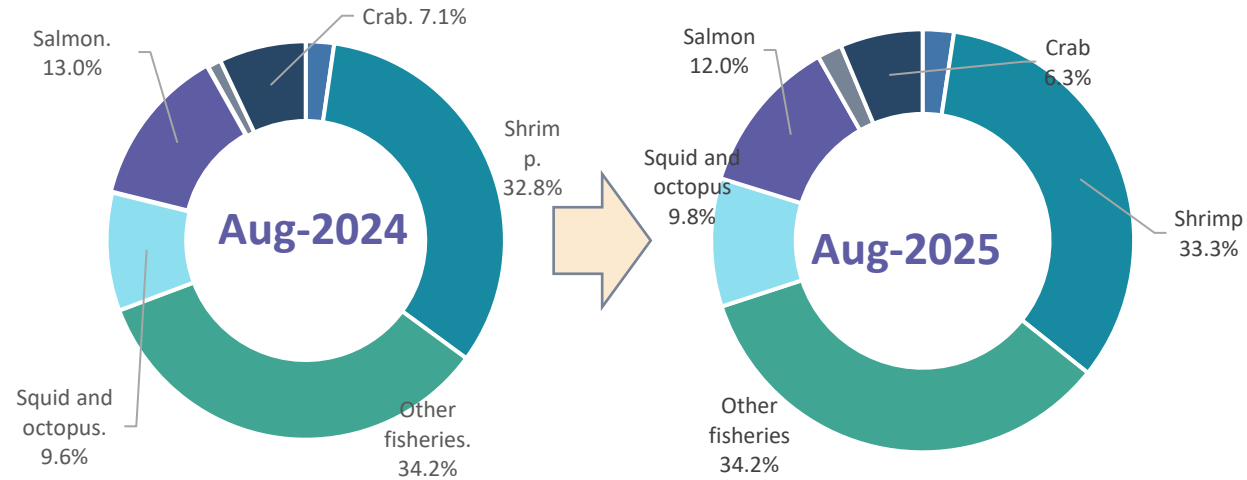


Source: Calculated from data of the Department of Customs

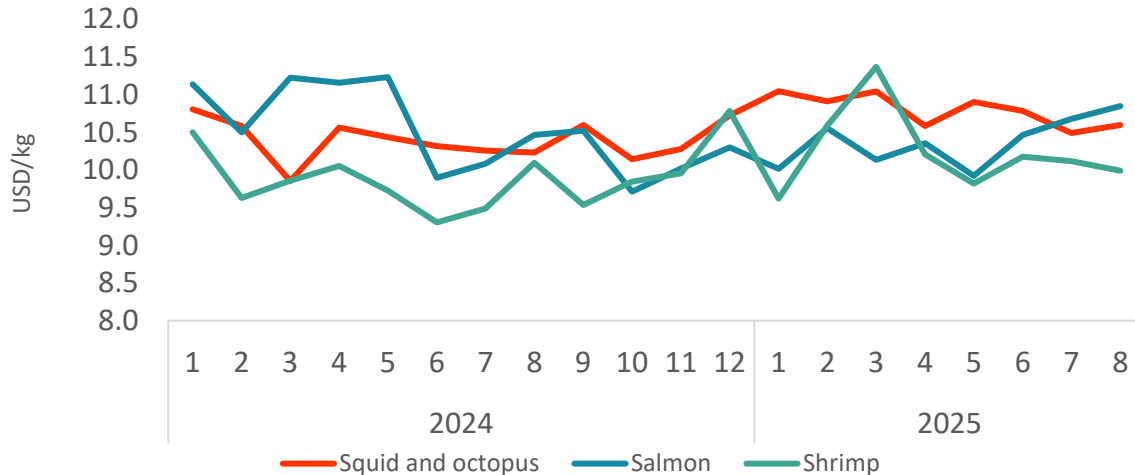


FISHERIES

Structure of exports by products to Japan, Aug-2025



Average export fisheries price to Japan, Aug-2025



Export results to Japan, Aug-2025



Salmon

Value: **19.8** million USD

Increase **11.9%** compared to Jul-2025

Increase **10.4%** compared to Aug-2024



Shrimp

Value: **55.0** million USD

Increase **14.4%** compared to Jul-2025

Increase **21.5%** compared to Aug-2024



Squid and octopus

Value: **16.2** million USD

Increase **23.9%** compared to Jul-2025

Increase **22.4%** compared to Aug-2024

Squid and Octopus

The average export price in Aug-2025 is **10.6** USD/kg; **increase 1.0%** compared to previous month; and **increase 3.6%** compared to the same month of 2024.

Salmon

The average export price in Aug-2025 is **10,8** USD/kg; **increase 1,6%** compared to previous month; and **increase 3,6%** compared to the same month of 2024.

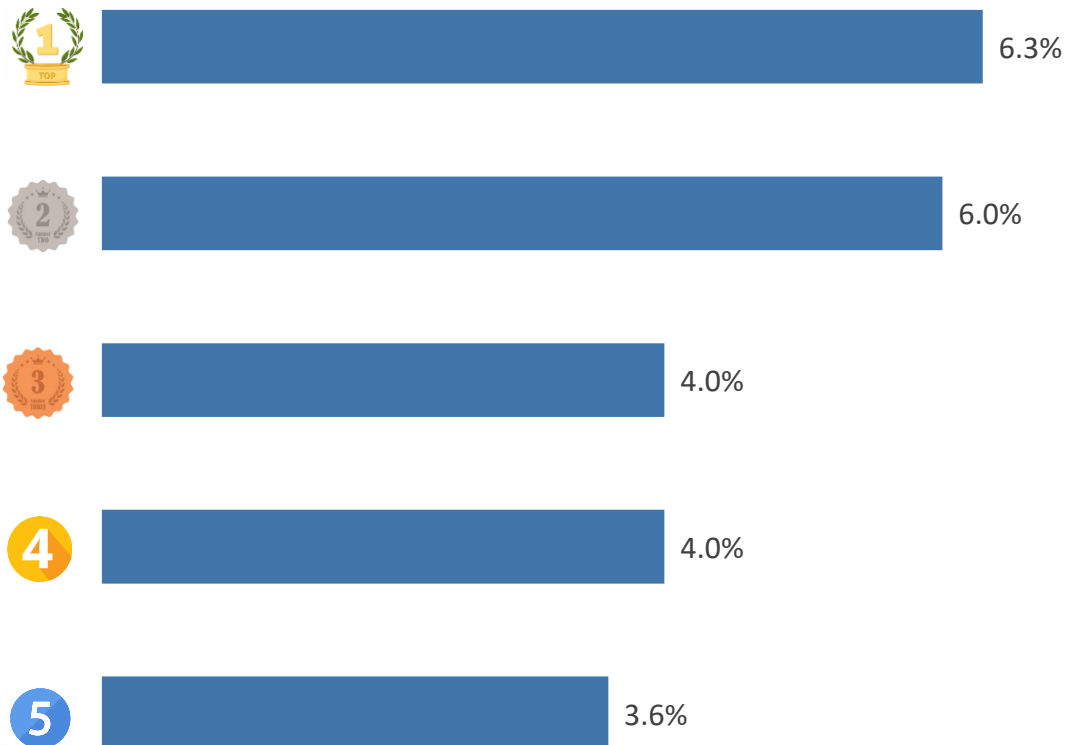
Shrimp

The average export price in Aug-2025 is **10.0** USD/kg; **decrease 1.3%** compared to previous month; and **decrease 1.1%** compared to the same month of 2024.

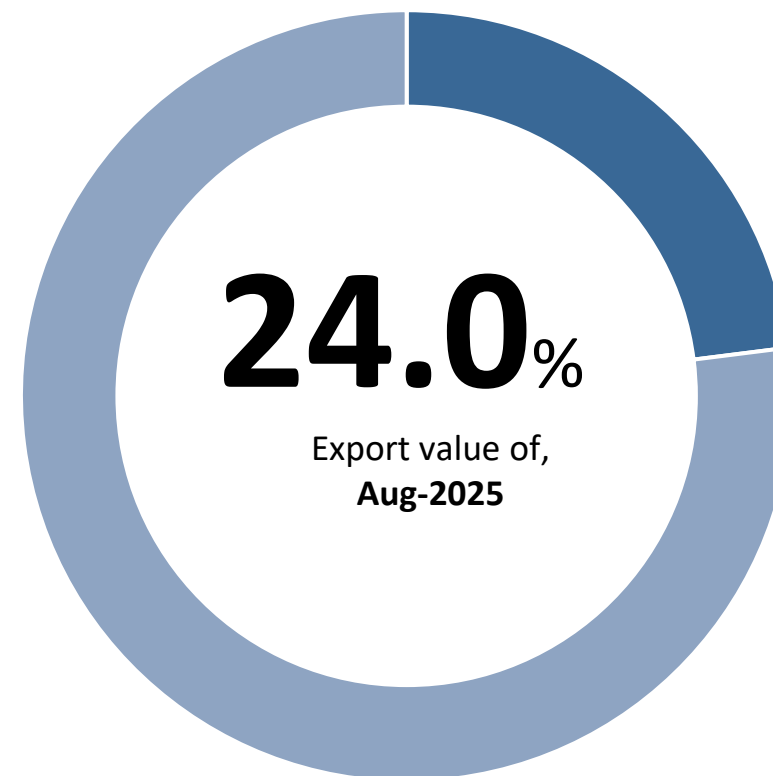


FISHERIES

TOP 5 export enterprises by value to Japan, Aug-2025



Value ratio of TOP 5 export enterprises to Japan, Aug-2025



Vietnamese seafood is the top 3 major suppliers in Japan

According to the Japan Customs Agency, in the first 7 months of 2025, Vietnam is the Japan's third largest supplier of seafood, accounting for 7.4% of total imports. Japan imported 78.9 thousand tons of seafood from Vietnam, worth about 627 million USD.

This result shows that the competitiveness and ability to meet strict standards of Vietnamese enterprises have been significantly improved. Experts forecast that seafood exports to Japan will continue to increase in the second half of the year – a period when consumption demand is usually high.

Vietnam also benefits from the CPTPP and VJEPA, which help reduce tariffs and increase market penetration opportunities. However, in order to maintain and expand market share, businesses need to strictly comply with regulations on food safety, environment and traceability – key factors to meet the trend of sustainable and transparent consumption in Japan.

Source: thuehaiquan.tapchikinhtetaichinh.vn

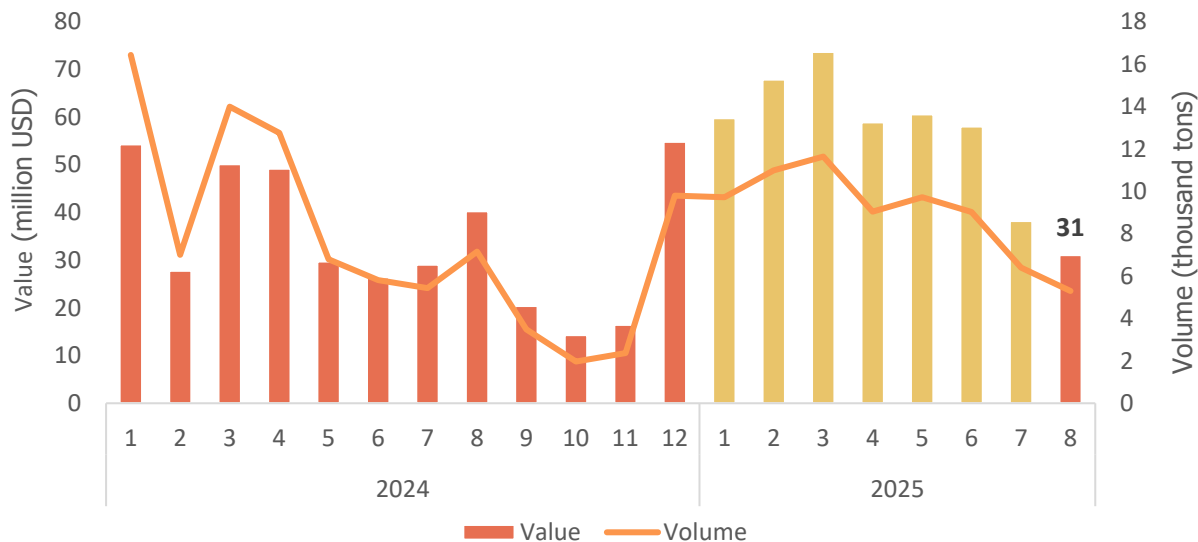


Tin liên quan

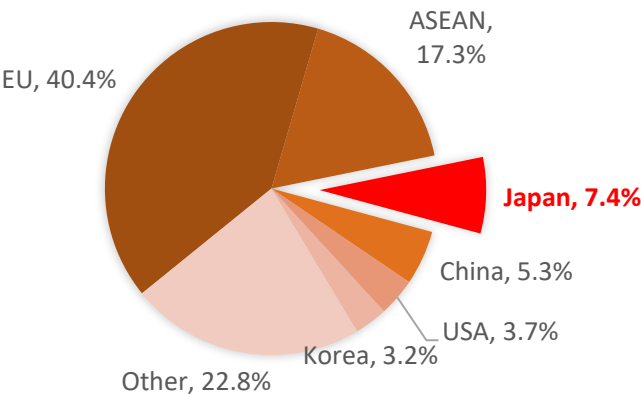


COFFEE

Export value and volume to Japan, Aug-2025



Percentage of export value to Japan, Aug-2025



Export results to sang Japan, Aug-2025

VALUE

31 million USD

↘ Decrease **18.7%** compared to Jul-2025

↘ Decrease **22.9%** compared to Aug-2024

↘ **3.3** million USD less than the monthly average rate in 2024.

❖ Accumulated 8 months of 2025 reaches **448** mil.USD, **108.6%** of total 2024.

VOLUME

5.3 thousand tons

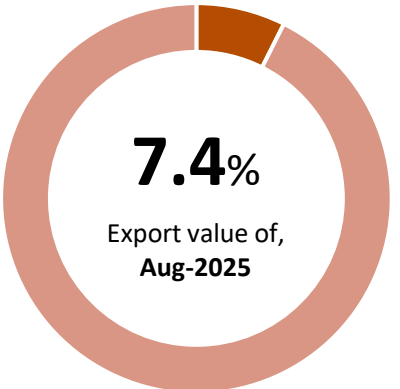
↘ Decrease **17.2%** compared to Jul-2025

↘ Decrease **25.9%** compared to Aug-2024

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

❖ Accumulated 8 months of 2025 reaches **71.8** thousand tons, **77.3%** of total 2024.

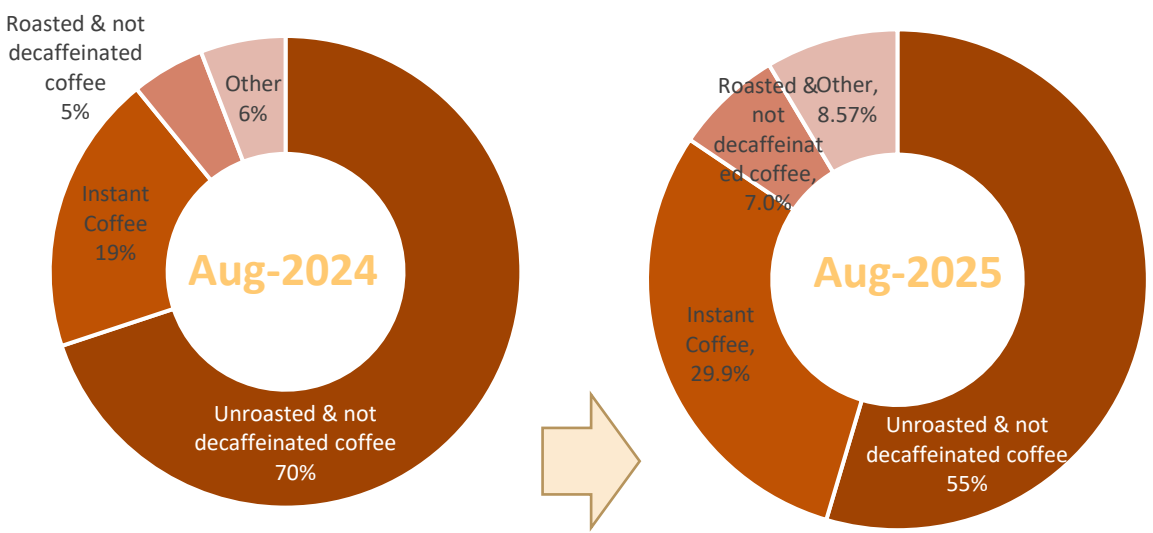
Changes in percentage of export value to Japan, Aug-2025



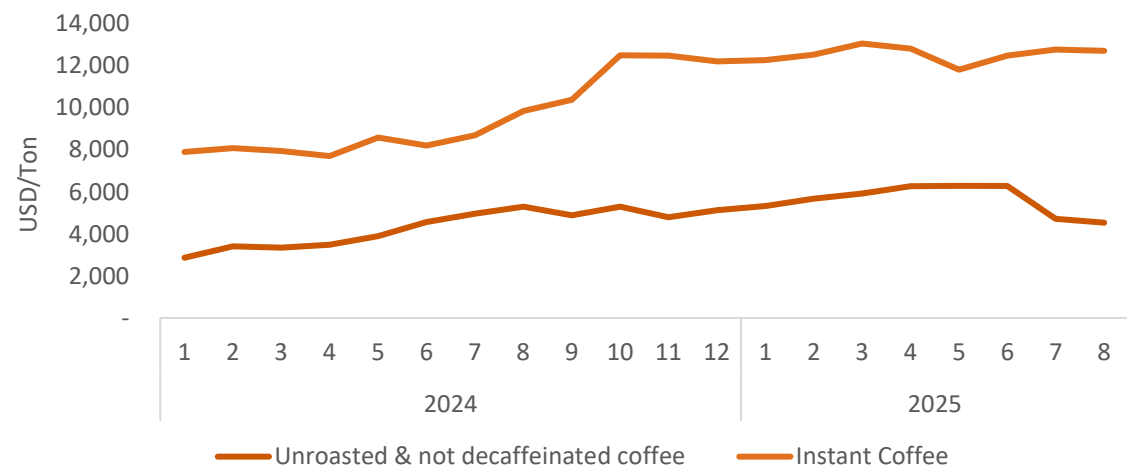


COFFEE

Structure of exports by products to Japan, Aug-2025



Average export coffee price to Japan, Aug-2025



Source: Calculated from data of the Department of Customs

Export results to Japan, Aug-2025



Unroasted & not decaffeinated coffee

Value: **16.9** million USD
Decrease **21.2%** compared to Jul-2025
Decrease **36.3%** compared to Aug-2024



Instant Coffee

Value: **9.3** million USD
Decrease **26.8%** so compared to Jul-2025
Increase **26.9%** compared to Aug-2024



Roasted & not decaffeinated coffee

Value: **2.2** million USD
Increase **69.3%** compared to Jul-2025
Increase **13%** compared to Aug-2024

Instant Coffee

The average export price in Aug-2025 is **12.700** USD/ton, **decrease 0.4%** compared to previous month; and **increase 29%** compared to the same month of 2024.

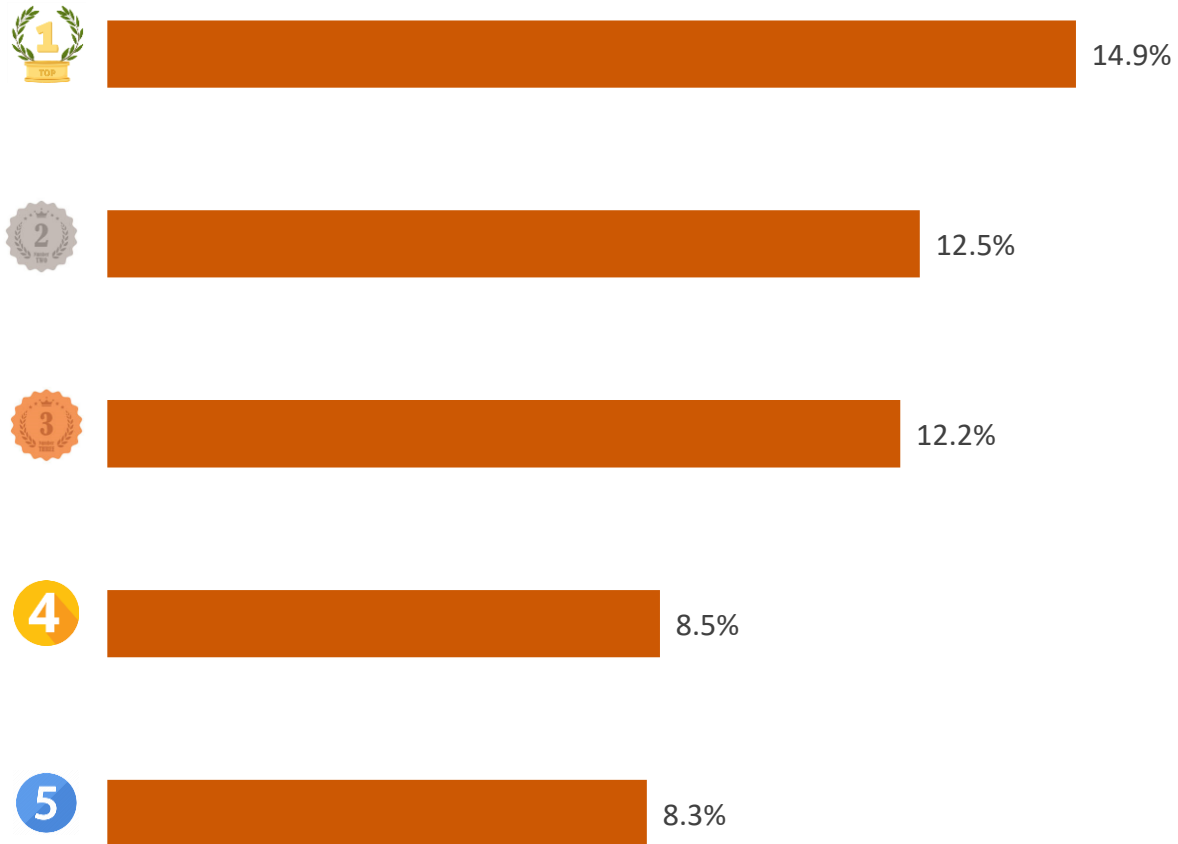
Unroasted & not decaffeinated coffee

The average export price in Aug-2025 is **4.533** USD/ton; **decrease 3.9%** compared to previous month; and **decrease 14.3%** compared to the same month of 2024.

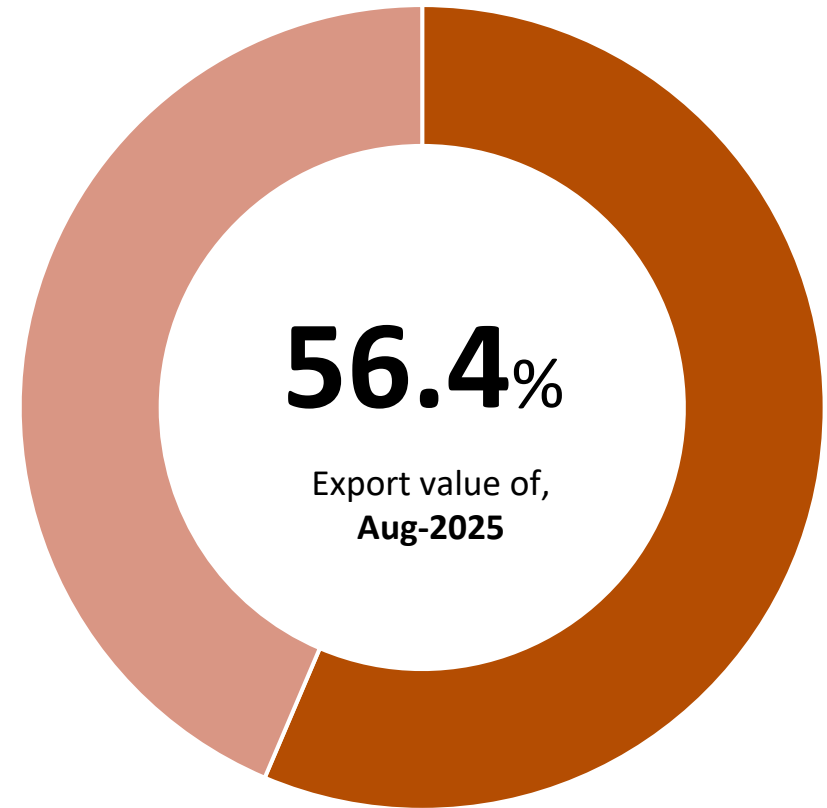


COFFEE

TOP 5 export enterprises by value to Japan, Aug-2025



Value ratio of TOP 5 export enterprises to Japan, Aug-2025





According to a report by IMARC Group (2025), the Japanese instant coffee market will reach 867.3 million USD in 2024 and increase to 1.3729 billion USD by 2033, with an average growth rate (CAGR) of 4.7%/year in the period 2025–2033.

Key growth drivers include:

- Convenience demand: Consumers, especially office workers and students, prefer quick-brew products that are suitable for busy lifestyles.
- The trend of premiumization: Instant coffee has been improved in taste, quality, packaging and has become a "gourmet" choice for young people who love exquisite coffee experiences.
- Health-awareness: interest in organic, low-caffeine, or antioxidant-rich coffee increases, in line with healthy and sustainable living trends.



The Japan Specialty Coffee Association (SCAJ) and the International Specialty Coffee Association (SCA) signed a Memorandum of Understanding (MoU) at the SCAJ Conference in Tokyo to promote global cooperation in specialty coffee education. The agreement focuses on expanding the Coffee Value Assessment (CVA) program and the Q Program in Japan, helping to standardize professional training to international standards.

The two sides committed to develop a network of CVA trainers, enhancing training opportunities for professionals in the coffee value chain, and raising awareness and understanding of the quality of specialty coffee. According to SCAJ and SCA leaders, this cooperation will contribute to the development of the global coffee community, while investing in human resources shaping the future of the coffee industry.



FRUITS AND VEGETABLES (EXPORT)

Export value to Japan, Aug-2025



Export results to Japan, Aug-2025

VALUE

21.5

million USD

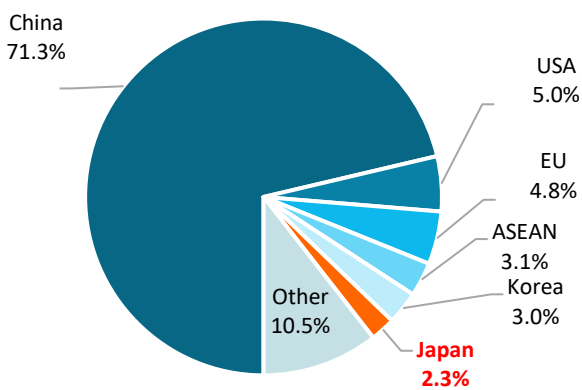
Increase **7.2%** compared to Jul-2025

Increase **19.3%** compared to Aug-2024

4.5 million USD more than the monthly average rate in 2024

Accumulated 8 months of 2025 reaches **163.4 million USD**, **80.4%** of total 2024

Percentage of export value to Japan, Aug-2025



Changes in percentage of export value to Japan, Aug-2025

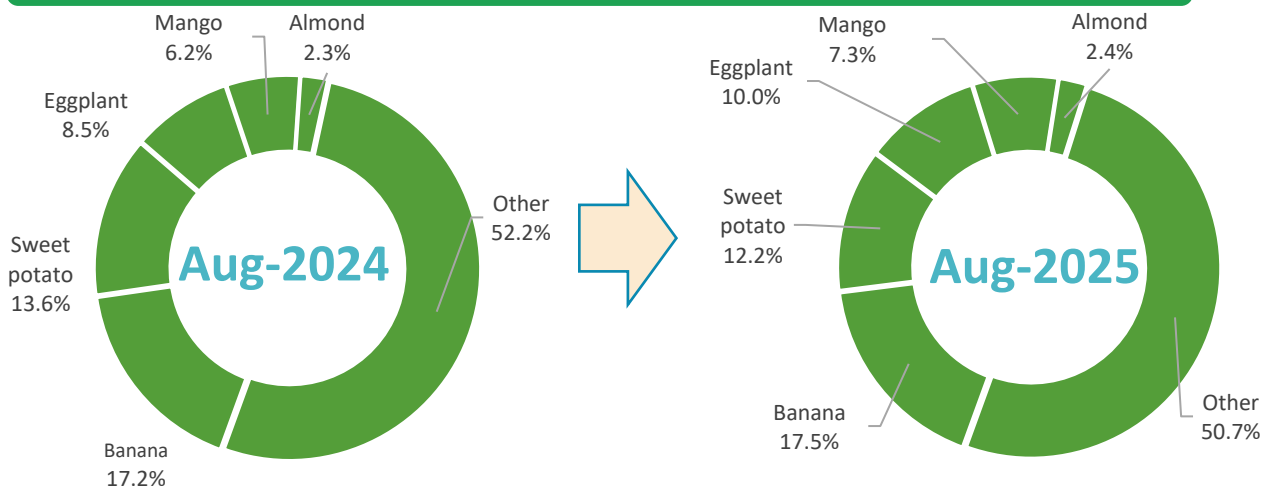


Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to Japan, Aug-2025



Sweet potato

Value: **2.6** million USD
Increase **27.2%** compared to Jul-2025
Increase **6.8%** compared to Aug-2024



Eggplant

Value: **2.1** million USD
Increase **25.2%** compared to Jul-2025
Increase **40.2%** so compared to Aug-2024

Export results to Japan, Aug-2025



Banana

Value: **3.8** million USD
Increase **3.5%** compared to Jul-2025
Increase **21.4%** compared to Aug-2024



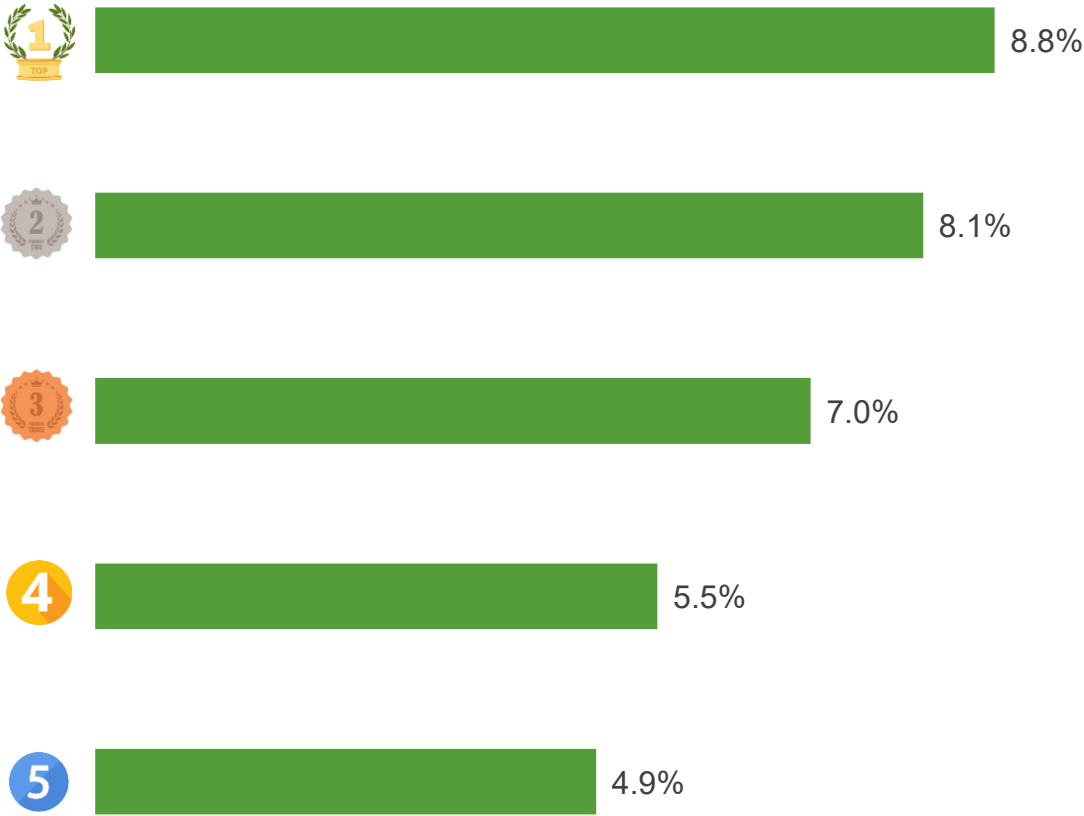
Mango

Value: **1.6** million USD
Decrease **6.2%** compared to Jul-2025
Increase **39.3%** compared to Aug-2024



FRUITS AND VEGETABLES (IMPORT)

TOP 5 export enterprises by value to
Japan, Aug-2025



Value ratio of TOP 5 export enterprises to
Japan, Aug-2025



Source: Calculated from data of the Department of Customs



FRUITS AND VEGETABLES (IMPORT)

Import value to Japan, Aug-2025



Import results from Japan, Aug-2025

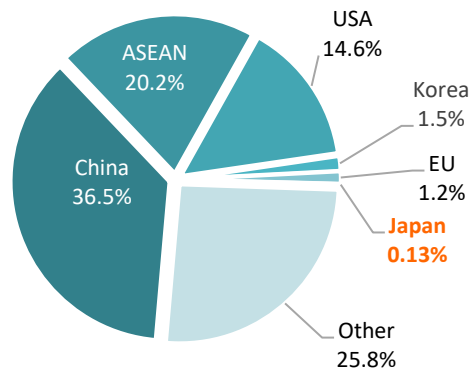


Decrease **12.8%** compared to Jul-2025

Decrease **5.6%** compared to Aug-2024
269.9 thousand USD more than the monthly average rate in 2024

Accumulated 8 months of 2025 reaches **3.1 million USD**, **47.2%** of total 2024

Percentage of import value from Japan, Aug-2025



Changes in percentage of import value from Japan, Aug-2025





Unusual heat affects potato harvest in Hokkaido

The potato harvest season in Hokkaido, the Japan's largest potato producing region, is at its peak, but the unusually hot summer heat has negative impact on farmers. The potato production in Tokachi region in Hokkaido accounts for about 30% of Japan's potato production. This year's potato production is about 10-20% lower than normal, and the volume of potatoes with small sizes and irregular shapes has increased due to record-high summer temperatures.

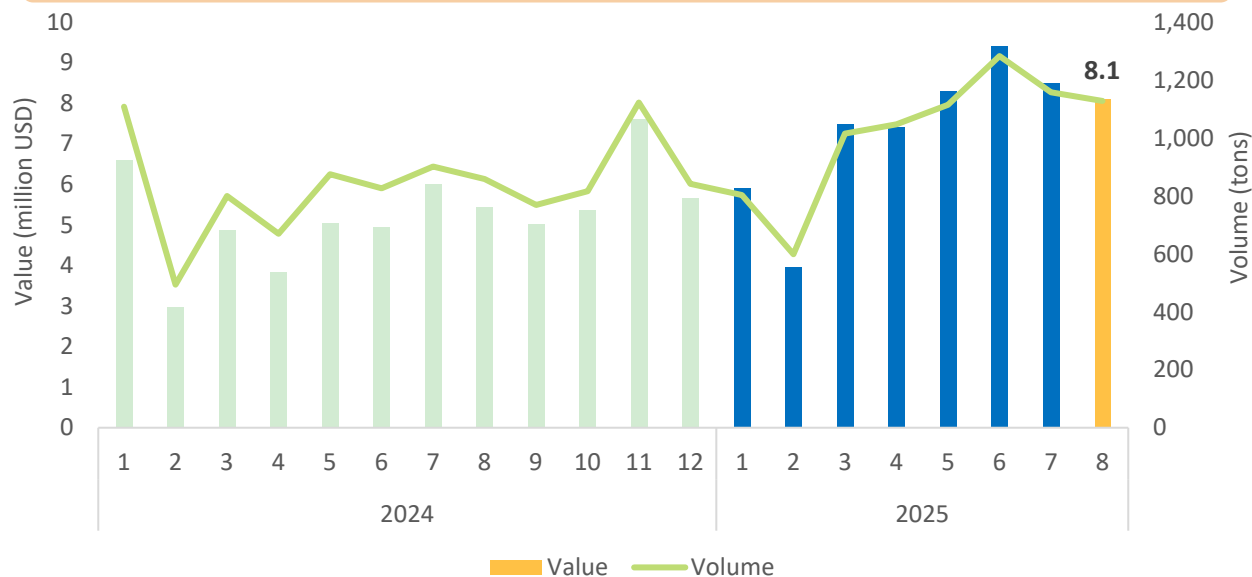
Source: [Www3.nhk.or.jp](http://www3.nhk.or.jp)





CASHEW NUTS

Export volume and value to Japan, Aug-2025



Export results to Japan, Aug-2025

VALUE
8.11 million USD

↘ Decrease **4.4%** compared to Jul-2025

↗ Increase **49%** compared to Aug-2024

↑ **2.8 million USD** more than the monthly average rate in 2024

❖ Accumulated 8 months of 2025 reaches **59 million USD, 93%** of total 2024

VOLUME
1.1 thousand tons

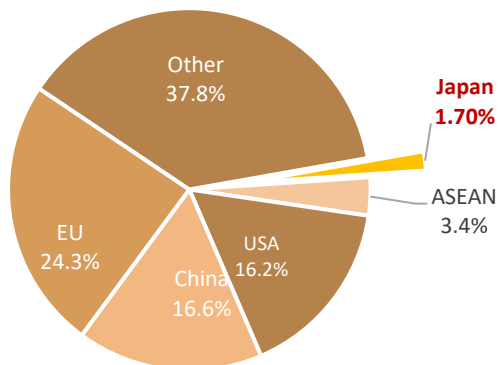
↘ Decrease **2.6%** compared to Jul-2025

↗ Increase **31%** compared to Aug-2024

↑ **288 tons** more than the monthly average rate in 2024

❖ Accumulated 8 months of 2025 reaches **8.1 thousand tons, 81%** of total 2024

Percentage of export value to Japan, Aug-2025



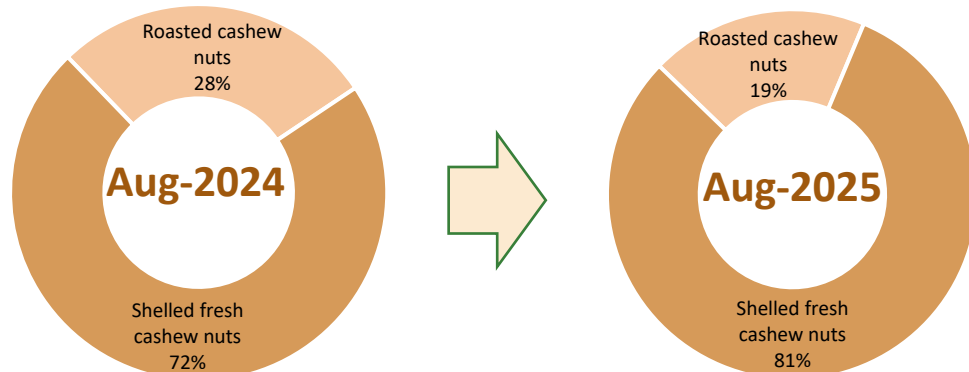
Changes in percentage of export value to Japan, Aug-2025



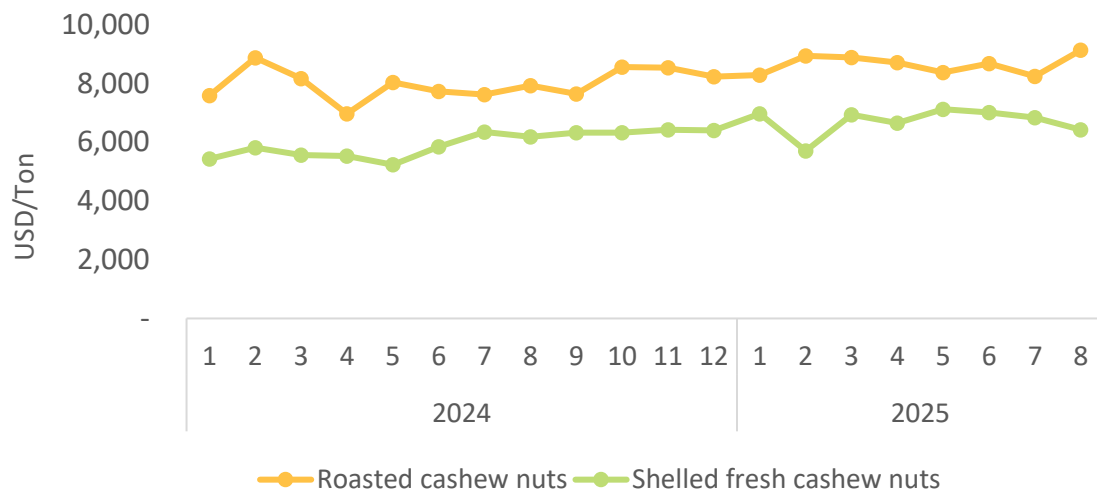


CASHEW NUTS

Structure of exports by products to Japan, Aug-2025



Average export cashew nuts price to Japan, Aug-2025



Export results to Japan, Aug-2025



Shelled fresh cashew nuts

Value: **6.6** million USD

Decrease **6.7%** compared to Jul-2025

Increase **13%** compared to Aug-2024



Roasted cashew nuts

Value: **1.5** million USD

Increase **6.7%** compared to Jul-2025

Decrease **1,8%** compared to Aug-2024

Shelled fresh cashew nuts

The average export price in Aug-2025 is **6.416** USD/ton; decrease **6,0%** compared to previous month; and increase **3,9%** compared to the same month of 2024.

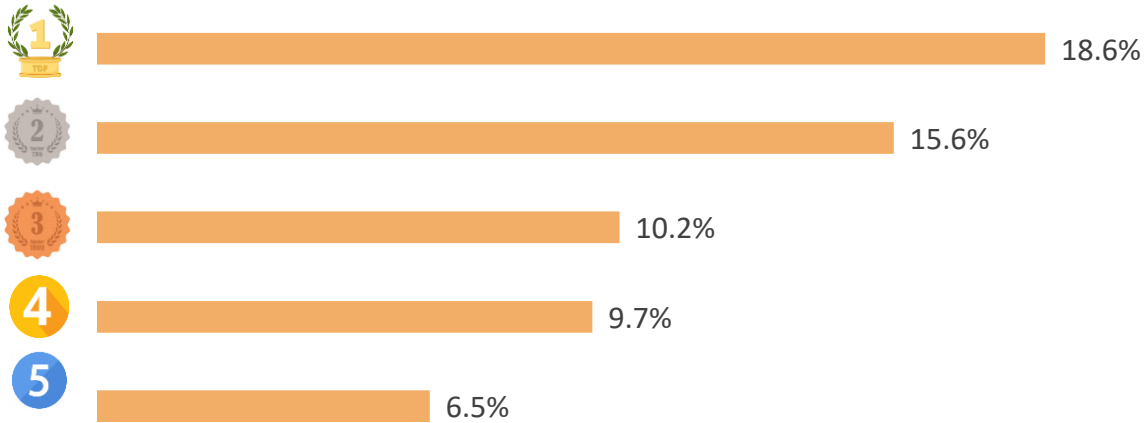
Roasted cashew nuts

The average export price in Aug-2025 is **9.122** USD/ton; increase **11%** compared to previous month; and increase **15%** compared to the same month of 2024.

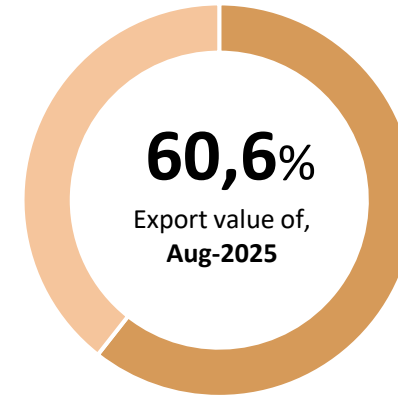


CASHEW NUTS

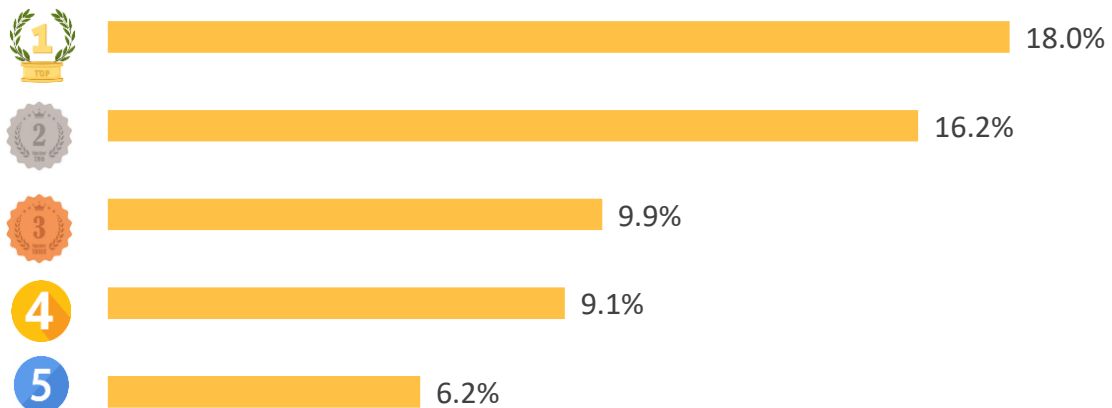
TOP 5 export enterprises by value to Japan, Aug-2025



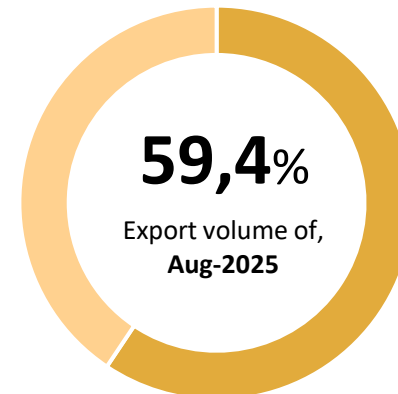
Value ratio of TOP 5 export enterprises to Japan, Aug-2025



TOP 5 export enterprises by volume to Japan, Aug-2025



Volume ratio of TOP 5 export enterprises to Japan, Aug-2025



CASHEW NUTS

SPOTLIGHTS



Cambodian cashew nut processing enterprises plan to expand production for exporting to the Japanese market

On October 1, 2025, the Ministry of Trade of Cambodia worked with Inoue Calcium Corporation to discuss the plan of expanding the production and processing of cashew nuts into finished products for export to the Japanese market.

At the meeting, the Ministry of Trade congratulated the cashew nut processing facility in Stung Treng province on its success in exporting the first batch of products, with a volume of 1 ton, to Japan, and said that this enterprise plans to continue exporting 2 more containers in 2026.

In addition, the Chairman of the Cambodia Cashew Nut Association said that the market, price and output of cashew nuts in 2025 will remain stable and positive, although heavy rainfall in the year has somewhat affected the quality of cashew nuts.

Source: kampuhealthmey.com



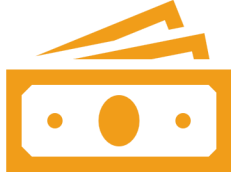


MEAT AND MEAT PRODUCTS (EXPORT)

Export value to Japan, Aug-2025



Export results to Japan, Aug-2025



VALUE

↘ Decrease **54%** compared to Jul-2025

↗ Increase **72.5%** compared to Aug-2024

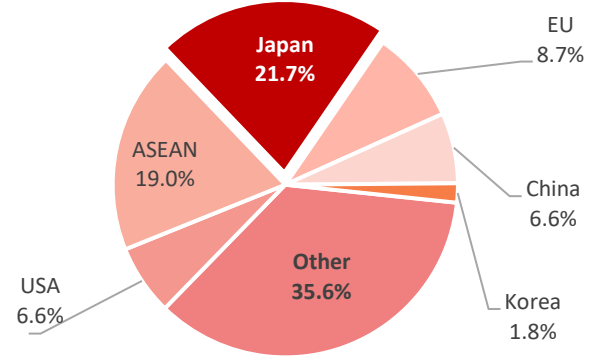
↗ **1.78 million USD** more than the monthly average rate in 2024

◇ Accumulated 8 months of 2025 reaches **335.3 million USD**, **102.8%** of total 2024

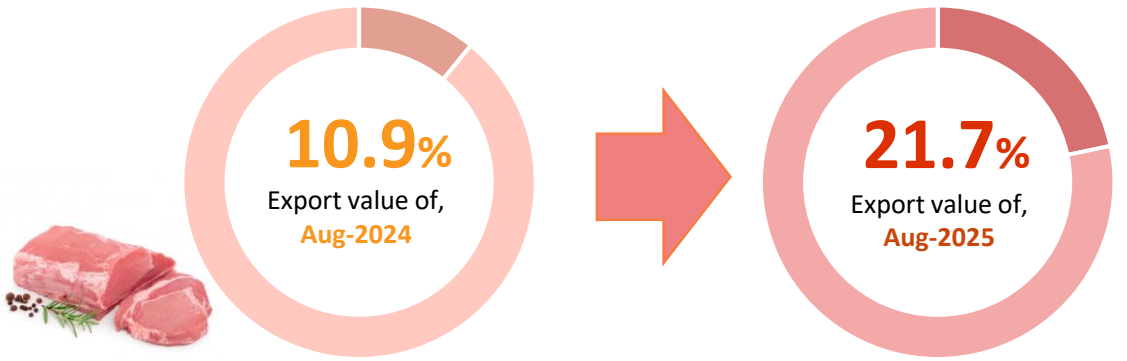
4.64

million USD

Percentage of export value to Japan, Aug-2025



Changes in percentage of export value to Japan, Aug-2025

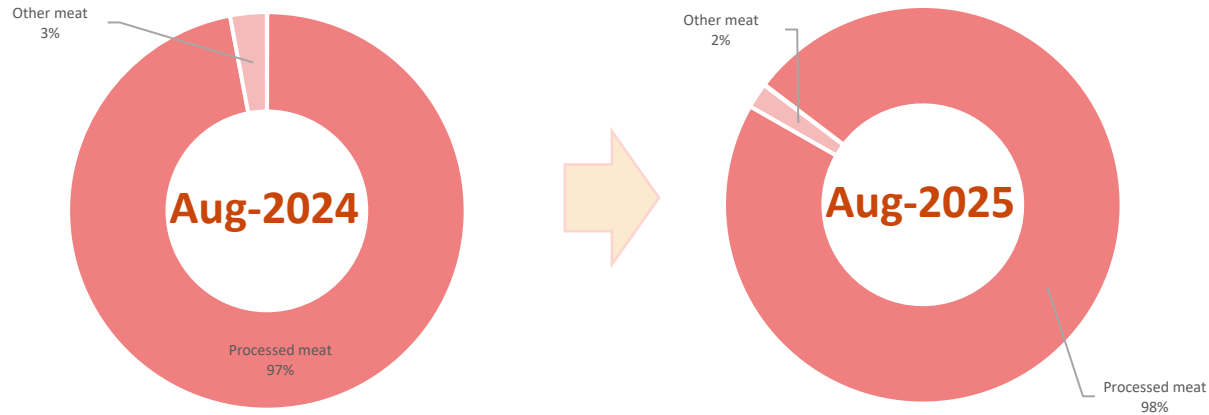


Source: Calculated from data of the Department of Customs



MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, Aug-2025



Export results to Japan, Aug-2025



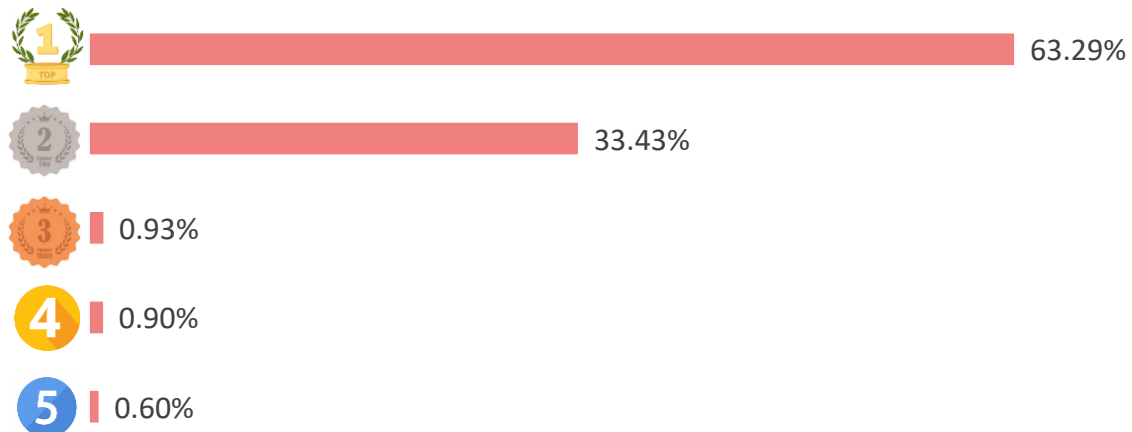
Processed meat

Value: **4.88** million USD

Increase **26.04%** compared to Jul-2025

Increase **81.5%** compared to Aug-2024

TOP 5 export enterprises by value to Japan, Aug-2025



Value ratio of TOP 5 export enterprises to Japan, Aug-2025



MEAT AND MEAT PRODUCTS

SPOTLIGHTS



At the beginning of 2026, Japan's total pig herd will be stable at about 8.65 million heads, of which the sow herd will reach 755 thousand heads. Pork production and slaughter numbers are almost unchanged compared to 2025, reaching 1.27 million tonnes of CWE and 16.05 million heads, respectively.

Pork consumption continued at a high level of 2.765 million tonnes CWE, supported by price advantages amid inflation and increased demand from both households and food services, although consumption of processed products slowed somewhat.

Pork imports slowed in the second half of 2025 due to high inventories, but are forecast to recover in 2026 to meet domestic demand, reaching 1.48 million tonnes CWE (weight per carcass).

Source: 3tres3.com





Any comments. please send to:

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