ISPAE
Volume 9/2025

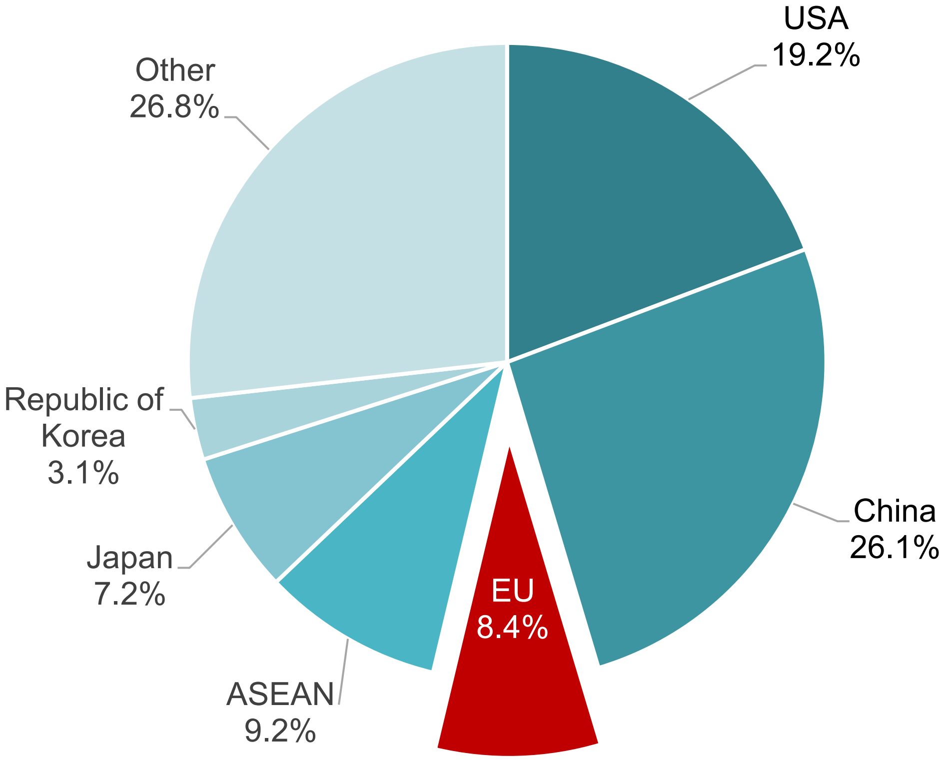
MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

FROM VIETNAM TO THE EU MARKET

Thực hiện: AGREINFOS

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

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



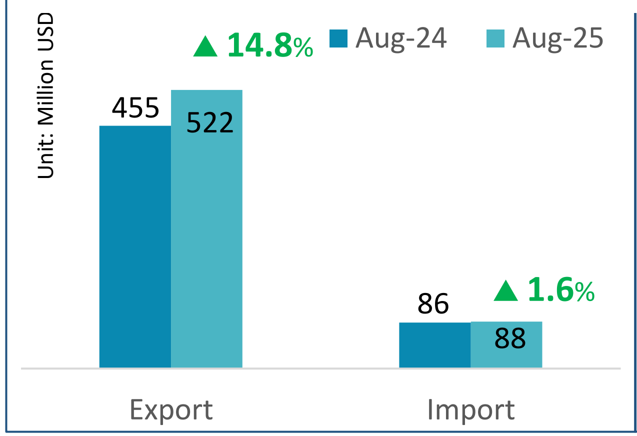
Changes in export proportion of AFF product to the EU Aug-2025 compared to Jul-2025 and Aug-2024

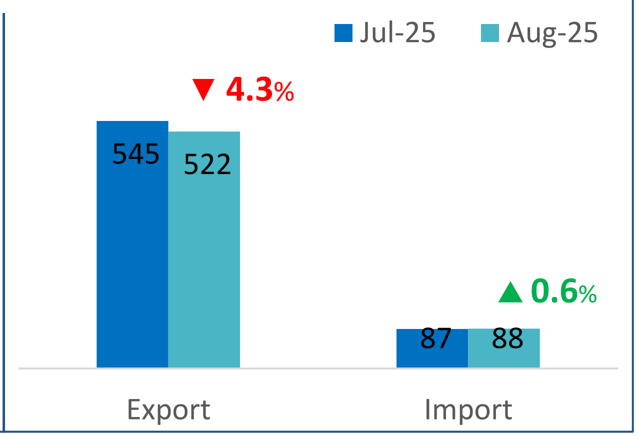
	Export value (mil. USD)	Compared to Jul-2025	Compared to Aug-2024
USA	1.202	▼ 1.3%	▼ 3.2%
China	1.632	▲ 3.3%	▲ 2.9%
EU	**522**	**▼ 0.8%**	**▲ 0.7%**
ASEAN	572	▲ 0.5%	▼ 2.8%
Japan	448	▲ 0.5%	▲ 0.6%
Republic of Korea	196	▼ 0.1%	▼ 0.2%
Total export	**6.246**		

Source: Calculated from data of the Department of Customs

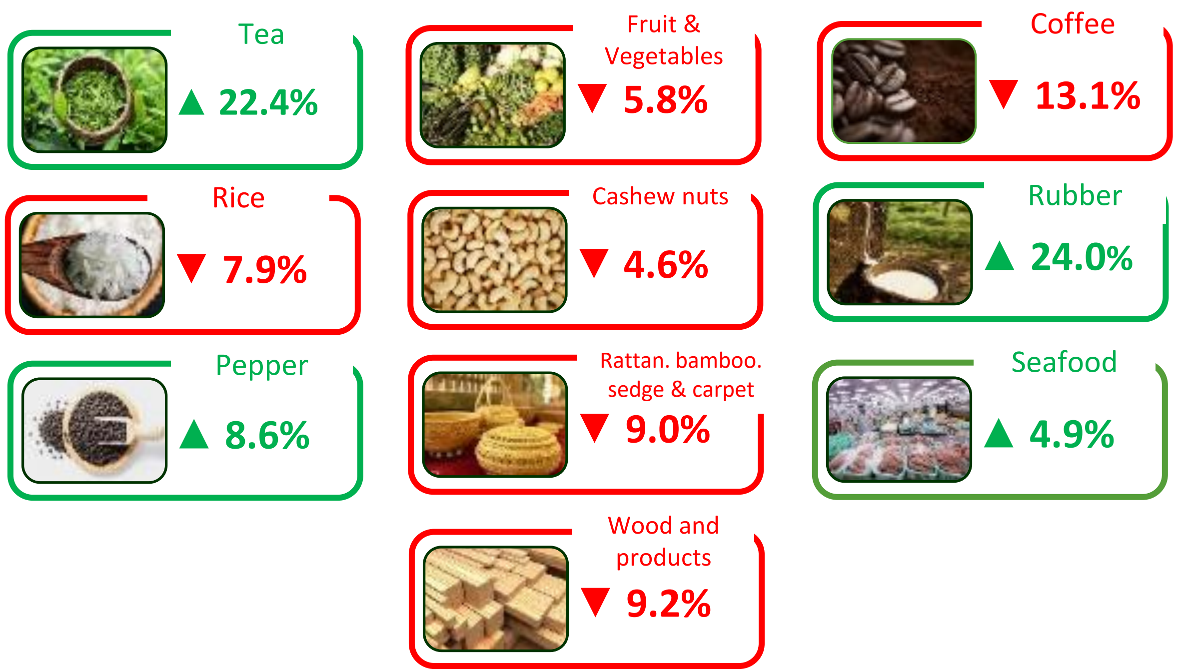
THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE EU IN AUGUST 2025

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

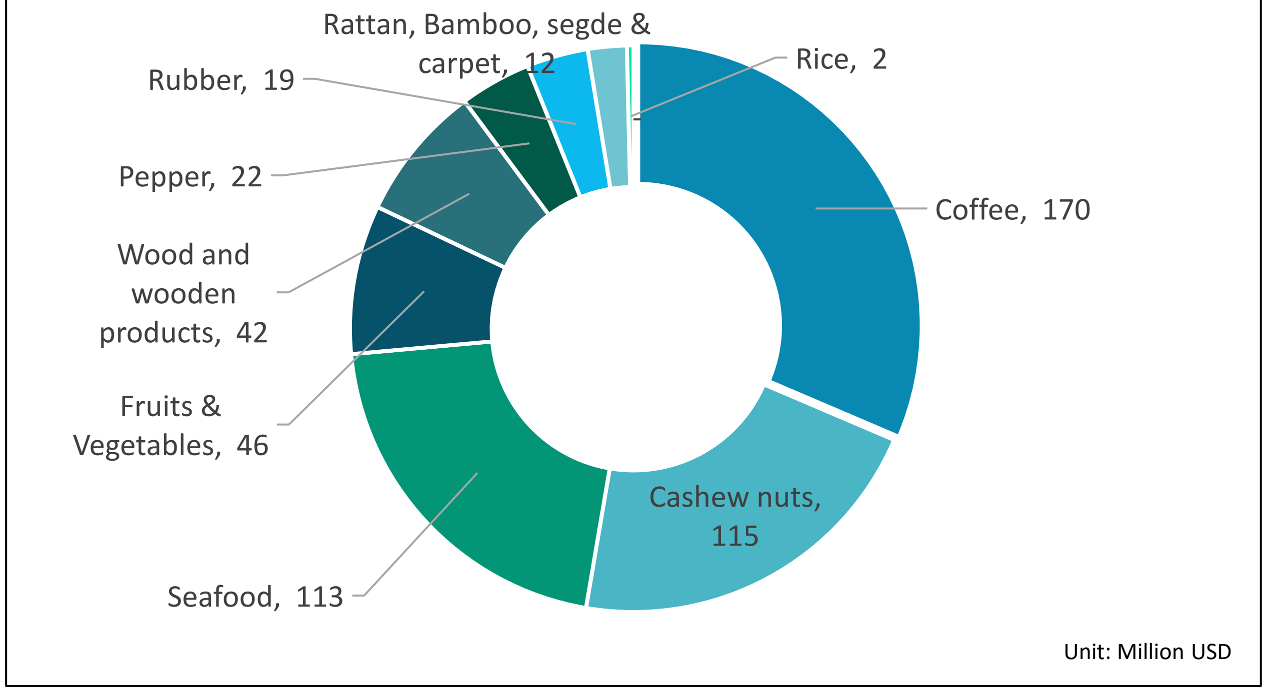




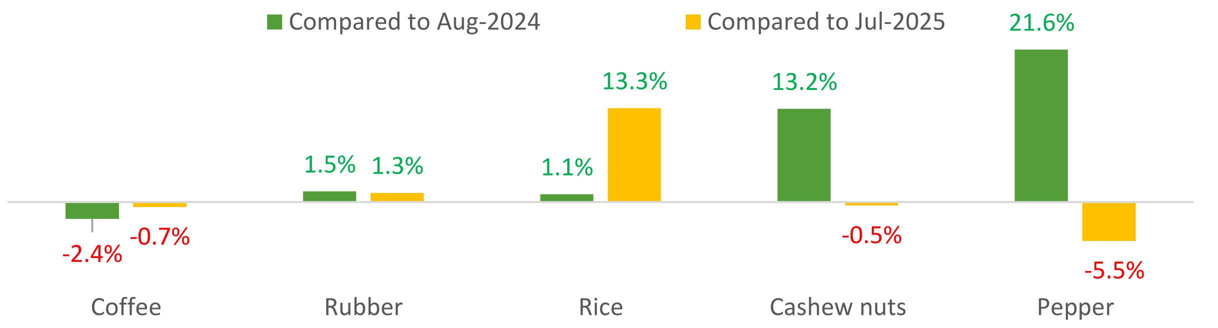
Changes in key AFF product export value to the EU in Aug-2025 compared to Jul-2025



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



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



Source: Calculated from data of the Department of Customs

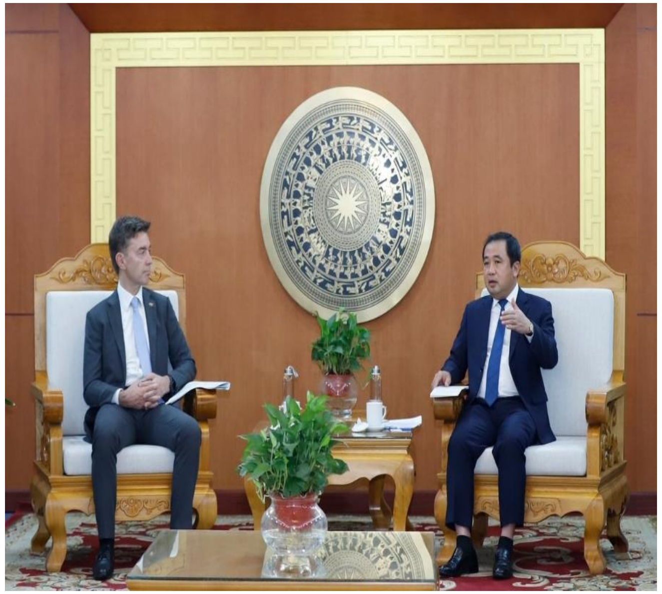
SPOTLIGHTS

Vietnam – EU strengthen cooperation

On September 15, 2025, in Hanoi, Acting Minister of Agriculture and Environment Mr. Tran Duc Thang discuss with EU Ambassador to Vietnam Julien Guerrier to promote bilateral cooperation in agriculture, trade, and environmental protection. Over the past five years, Vietnam–EU agricultural trade has grown by 40%. Both sides agreed to enhance collaboration in green agriculture, ecological transition, climate change response, and emission reduction. Vietnam pledged to accelerate the settlement of pending import–export dossiers and simplify procedures to facilitate business operations.

They also discussed combating illegal, unreported, and unregulated (IUU) fishing, with Vietnam reaffirming its determination to lift the “yellow card” by 2025 and calling for continued EU support. Ambassador Guerrier welcomed Vietnam’s goodwill and expressed readiness to provide technical assistance and share expertise in sustainable agriculture, environmental governance, and EVFTA implementation. The meeting concluded with a joint commitment to deepen cooperation, aiming to foster a greener agricultural sector and net-zero emissions..

Source: Vneconomy.vn



Eurozone inflation rebounds

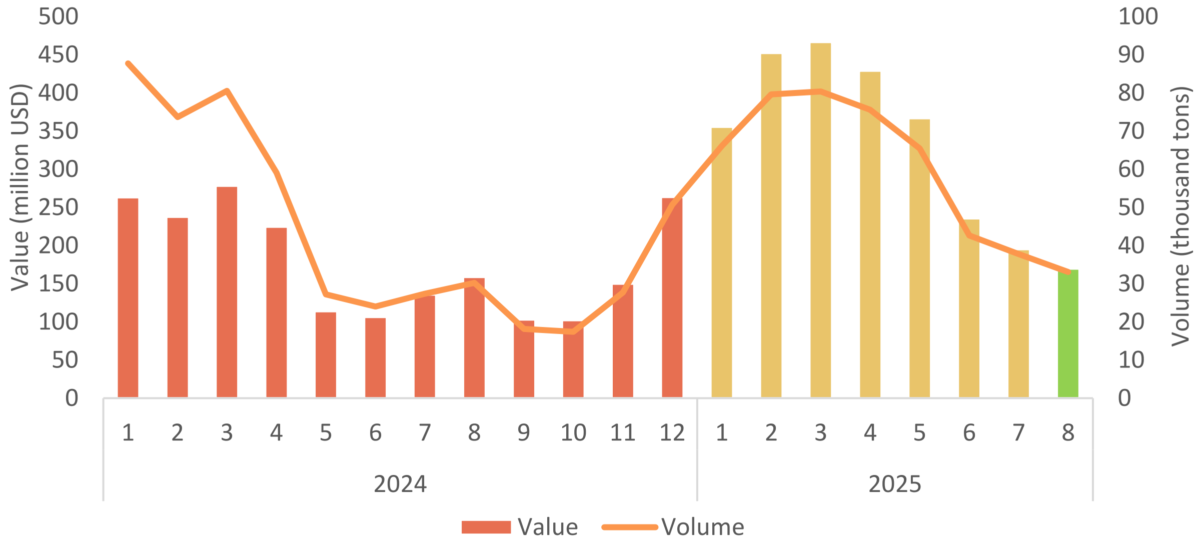
In September 2025, Eurozone inflation rose again to 2.2%, exceeding the target of 2% after five months of stabilizing. The rebound reignited concerns about slower growth, high public debt, and the need to maintain tight monetary policy. Core inflation remained at 2.3%, mainly driven by rising service prices. Major economies face distinct pressures: France is burdened by debt servicing costs of about EUR 67 billion and ongoing social unrest; Germany recorded 2.4% inflation alongside declining business confidence due to weak industrial exports; while Spain’s public debt climbed to over 103% of GDP.

The U.S. tariff of 15% on European exports, coupled with higher borrowing costs, has become a strong headwind to the region’s recovery. The European Central Bank (ECB) projects Eurozone GDP growth at 1.2% in 2025, and is unlikely to further cut interest rates in the final quarter as it prioritizes inflation control. Overall, Europe is entering a period of sluggish growth, with price and debt pressures remaining the key challenges to macroeconomic stability.

Source: Vtv.vn

COFFEE

Export volume and value to the EU, Aug-2025



Export results to the EU, Aug-2025

VALUE

169.6 ***mil. USD***

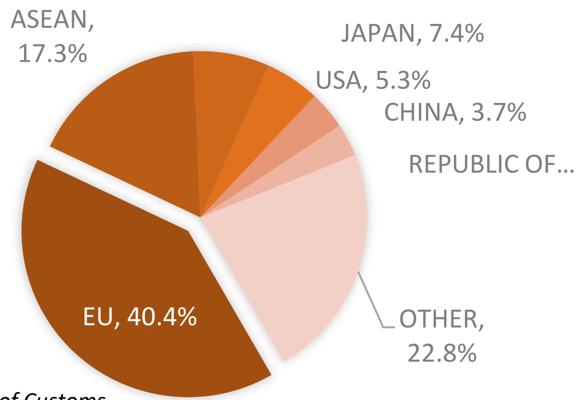
- Decrease **13.1%** compared to Jul-2025
- Increase **7%** compared to Aug-2024
- **8.4** mil. USD less than compared to monthly average in 2024.
- Accumulated 8 months of 2025 reaches **2.67** bil. USD, **125%** of total 2024.

VOLUME

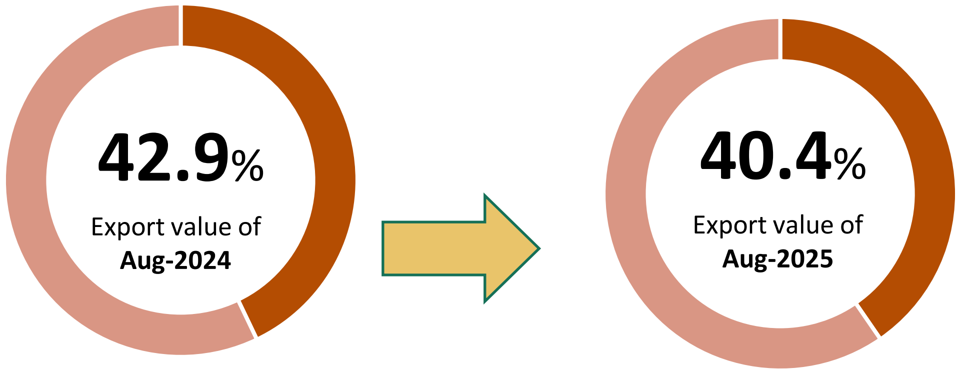
33.1 ***thousand tons***

- Decrease **12.4%** compared to Jul-2025
- Increase **9.6%** compared to Aug-2024
- **10.6** thousand tons less than compared to monthly average in 2024.
- Accumulated 8 months of 2025 reaches **480.7** thousand tons, **91.8%** of total 2024.

Percentage of export value to the EU, Aug-2025



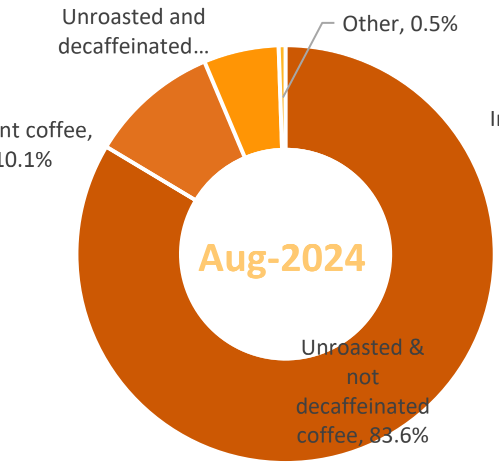
Changes in percentage of export value to the EU, Aug-2025

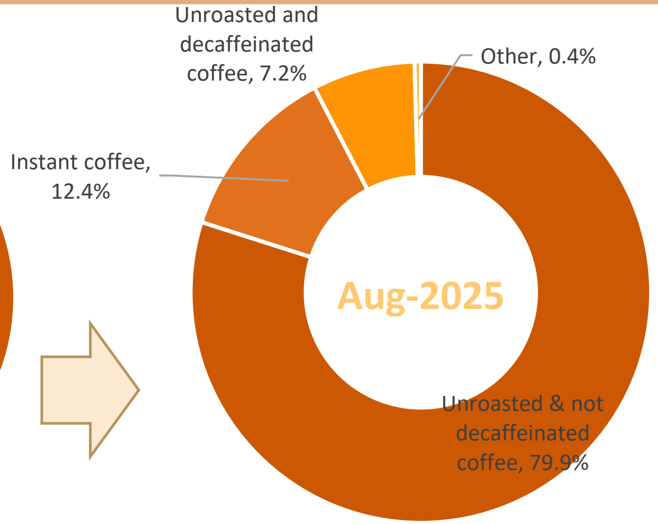


Source: Calculated from data of the Department of Customs

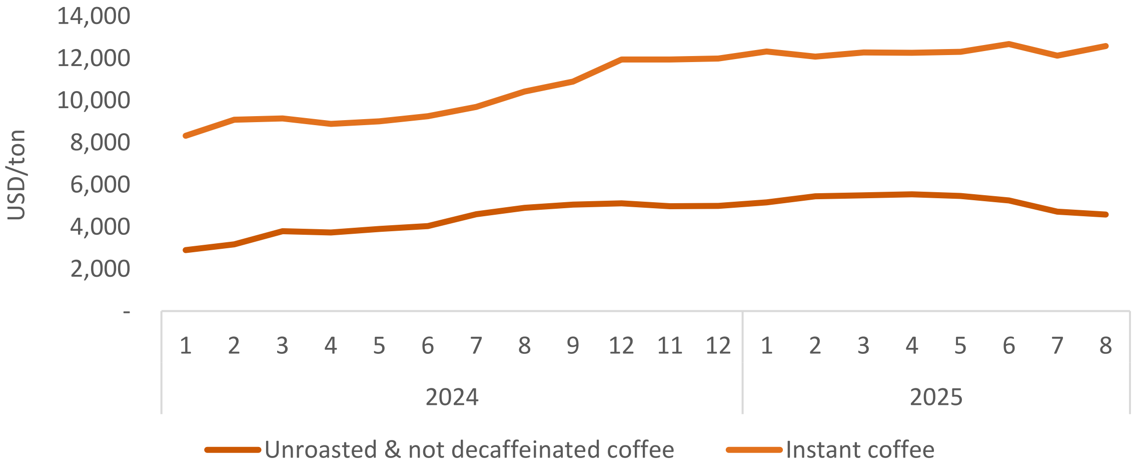
COFFEE

Structure of exports by products to the EU, Aug-2025





Average export price to the EU, Aug-2025



Source: Calculated from data of the Department of Customs

Export results to the EU, Aug-2025

Unroasted & not decaffeinated coffee

Value: **140.1** mil. USD

Decrease **15.1**% compared to Jul-2025

Increase **8.4**% compared to Aug-2024

Instant coffee

Value: **21.8** mil. USD

Decrease **0.3**% compared to Jul-2025

Increase **40.2**% compared to Aug-2024

Unroasted and decaffeinated coffee

Value: **12.6** mil. USD

Increase **45.6**% compared to Jul-2025

Increase **40.7**% compared to Aug-2024

Instant coffee

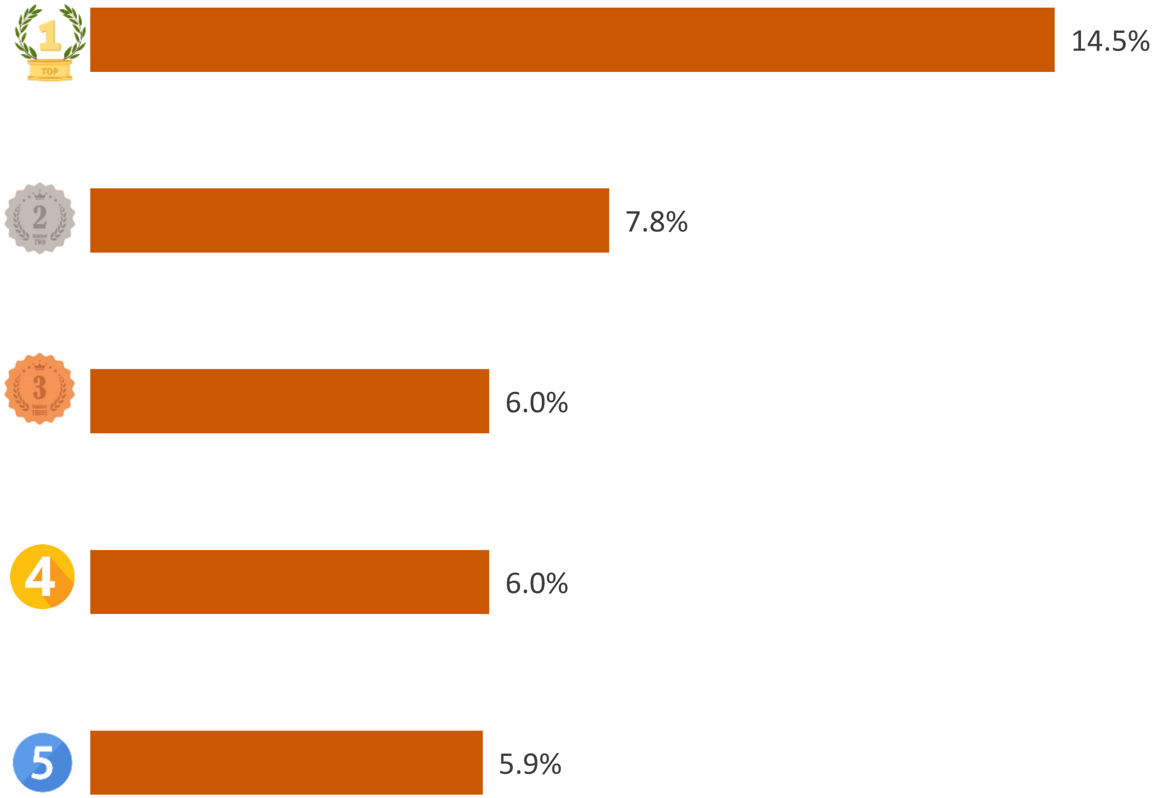
The average export price in Aug-2025 is **12,586** USD/ton; increase **3.8**% compared to the previous month, and increase **20.8**% compared to the same month 2024.

Unroasted & not decaffeinated coffee

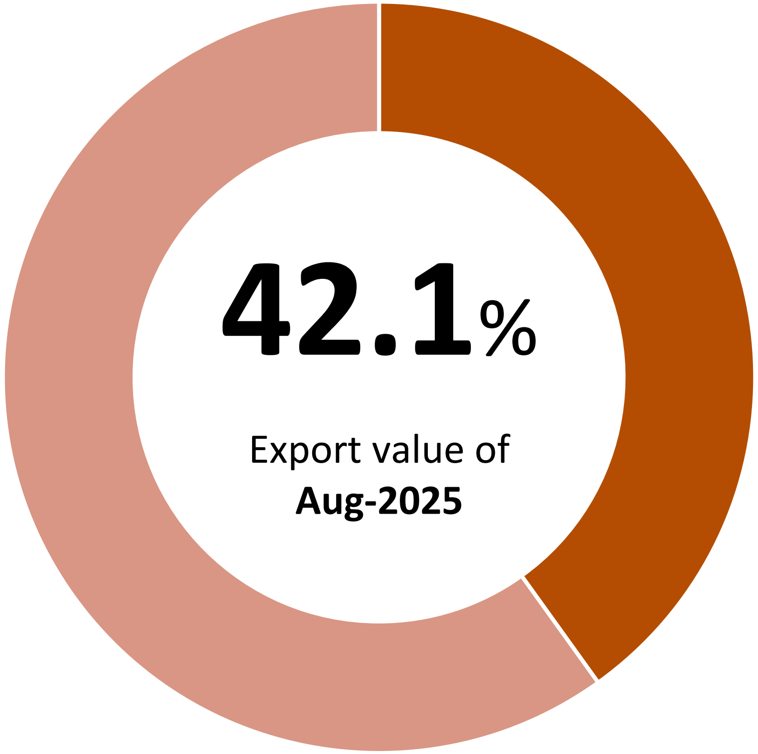
The average export price in Aug-2025 is **4.576** USD/ton; decrease **2.5**% compared to the previous month, and decrease **6.6**% compared to the same month 2024.

COFFEE

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



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



Source: Calculated from data of the Department of Customs

COFFEE

SPOTLIGHTS

EUDR may be postponed until December 2026

On September 23, the European Commission announced its intention to delay the enforcement of the EU Deforestation Regulation (EUDR) by one year — from December 30, 2025, to December 30, 2026. It should be noted that this is only a proposal for postponement, not yet an official decision to suspend, withdraw, or amend the regulation.

The action is due to concerns over the readiness of information technology systems required to operate the EUDR compliance framework. Industry associations are closely monitoring the situation and assisting businesses in ensuring full preparedness for compliance the regulation takes effect.

Source: ukft.org

COFFEE

SPOTLIGHTS

Europe’s Ready-to-Drink (RTD) coffee market will reach USD 4.59 Billion by 2033

Europe’s RTD coffee market is experiencing robust growth and is projected to reach USD 4.59 billion by 2033, up from USD 2.48 billion in 2024, reflecting a compound annual growth rate (CAGR) of 7.1% during 2025–2033. This expansion is driven by the busy lifestyle trend, convenience demand, and a shift toward healthier, low-sugar, and plant-based beverages. Consumers are increasingly favoring natural, low-calorie, plant-based drinks with functional benefits.

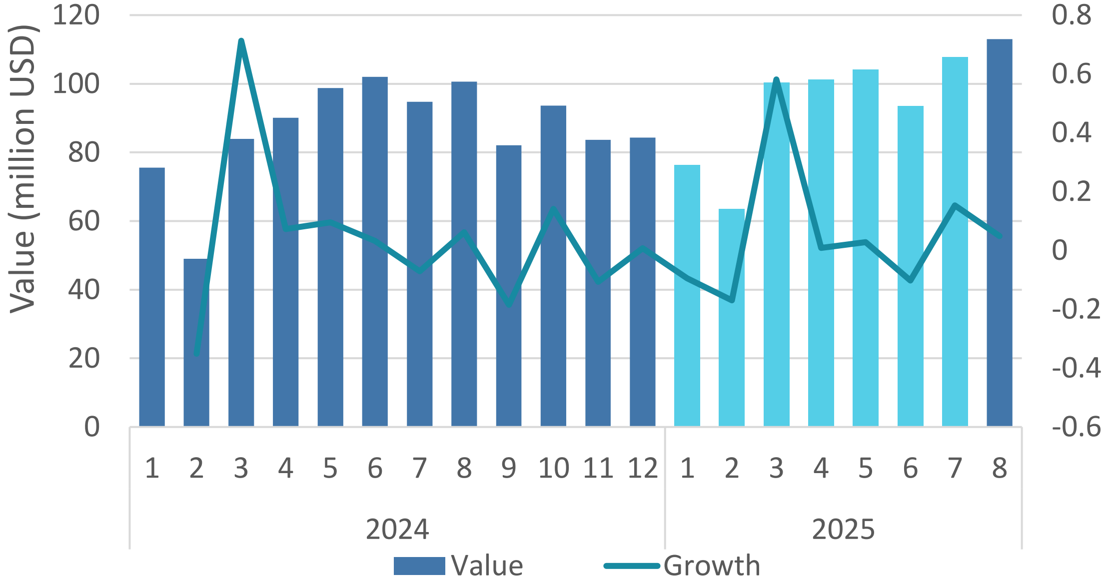
Popular flavors such as cold brew, latte, and caramel are particularly attractive to younger consumers. Moreover, sustainability factors — from recyclable packaging to green supply chains — are becoming essential. Strong growth has been recorded in France, the UK, and Germany, where coffee culture aligns with new health-conscious lifestyles.

Despite challenges in nutrition management and product positioning, major corporations such as Nestlé, PepsiCo, Coca-Cola, Lavazza, and Illy are investing heavily in transforming RTD coffee from a niche product into a mainstream beverage category across Europe in the near future.

Source: vocal.media

SEAFOOD

Export value to the EU, Aug-2025



Export results to the EU, Aug-2025

VALUE

113.0 *mil. USD*

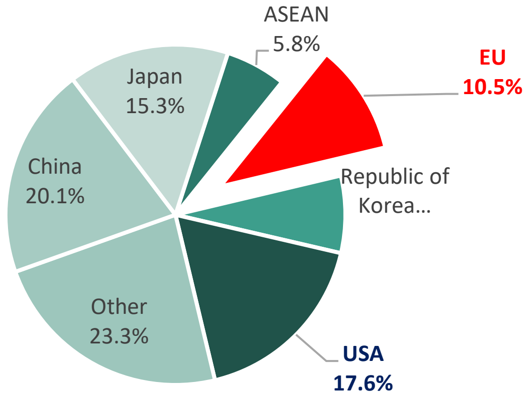
Increase **4.9%** compared to Jul-2025

Increase **12.3%** compared to Aug-2024

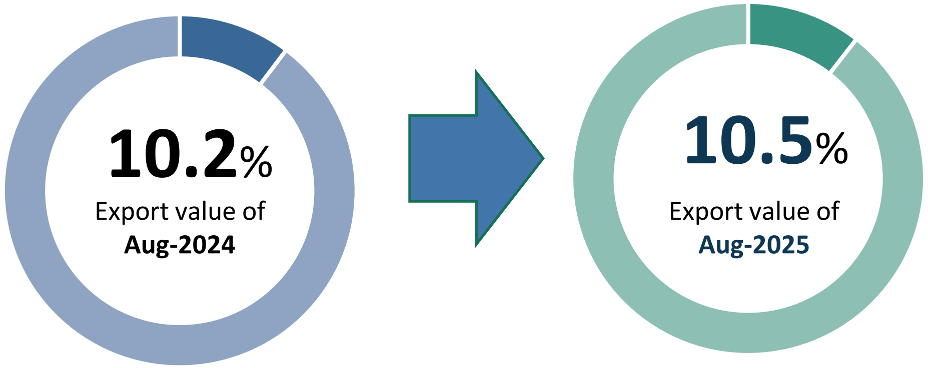
26.5 mil. USD more than compared to average rate in 2024

❖ Accumulated 8 months of 2025 reaches **759.9** triêu USD, **73.2%** of total 2024

Percentage of export value to the EU, Aug-2025



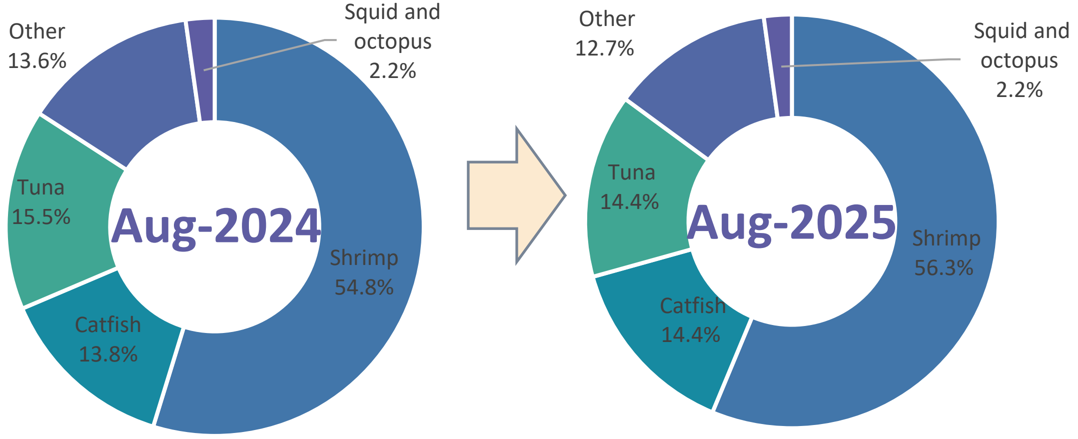
Changes in percentage of export value to the EU, Aug-2025



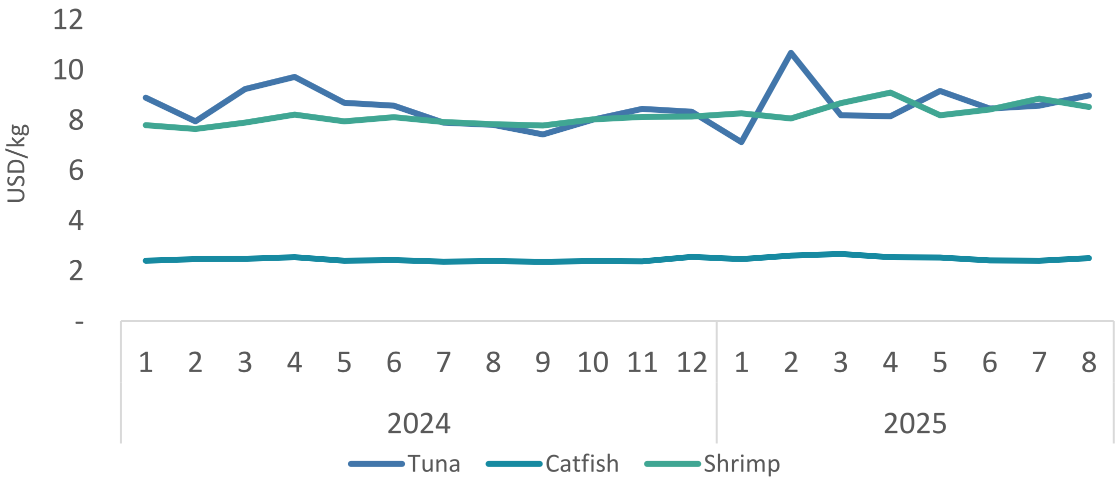
Source: Calculated from data of the Department of Customs

SEAFOOD

Structure of exports by products to the EU, Aug-2025



Average export price to the EU, Aug-2025



Source: Calculated from data of the Department of Customs

Structure of exports by products to the EU, Aug-2025

Shrimp

Value: **63.6** mil. USD

Increase **11.3**% compared to Jul-2025

Increase **15.4**% compared to Aug-2024

Catfish

Value: **16.3** mil. USD

Increase **13.6**% compared to Jul-2025

Increase **16.8**% compared to Aug-2024

Tuna

Value: **16.3** mil. USD

Decrease **5.7**% compared to Jul-2025

Increase **4.0**% compared to Aug-2024

Tuna

The average export price in Aug-2025 is **9.0** USD/kg; increase **4.8%** compared to the previous month; and increase **15.0%** compared to the same month 2024.

Catfish

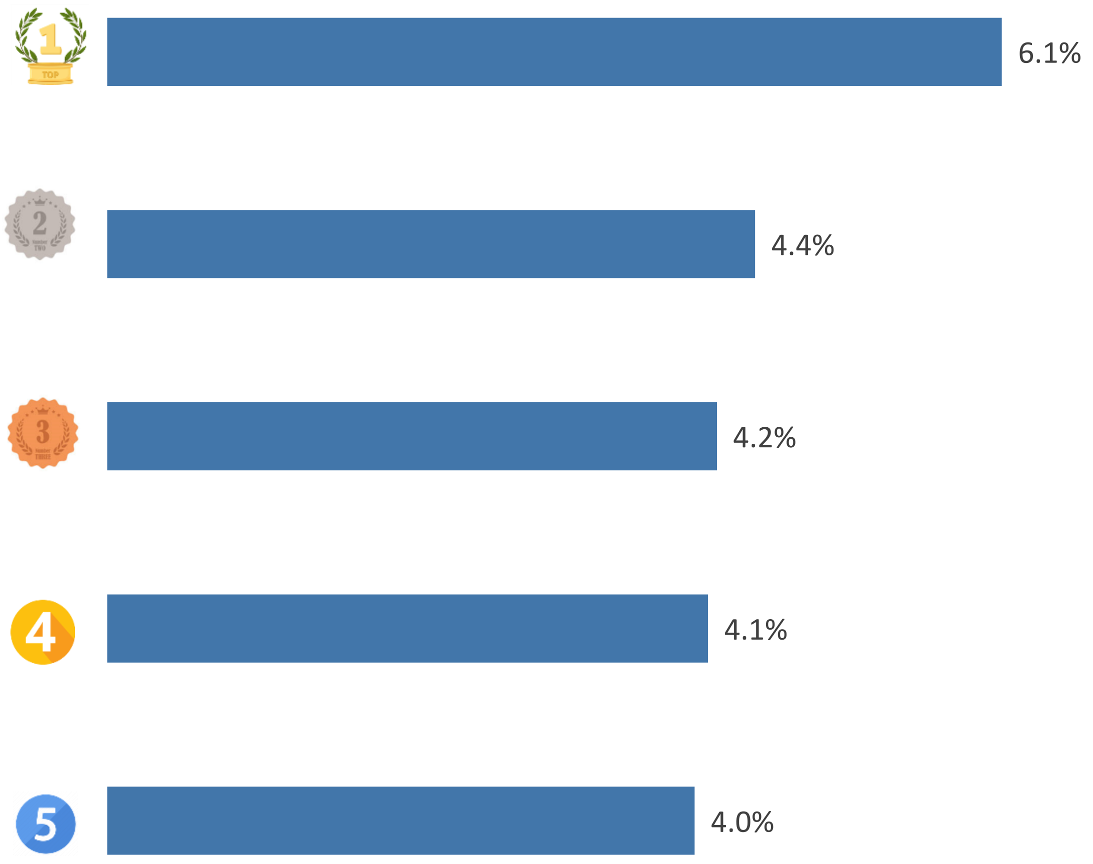
The average export price in Aug-2025 is **2.5** USD/kg; increase **3.8%** compared to the previous month; and increase **4.3%** compared to the same month 2024.

Shrimp

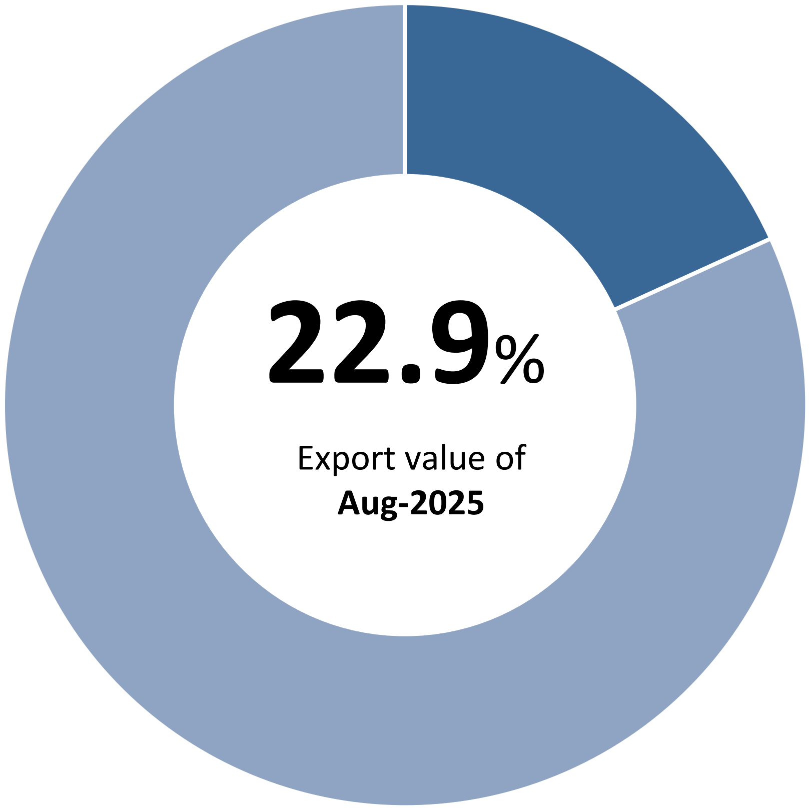
The average export price in Aug-2025 is **8.5** USD/kg; decrease **3.8%** compared to the previous month; and increase **8.6%** compared to the same month 2024.

SEAFOOD

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



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



Source: Calculated from data of the Department of Customs

SPOTLIGHTS

EU and Indonesia sign FTA: A new challenge for Vietnam's tuna

On September 23, 2025, the European Union (EU) and Indonesia officially concluded negotiations for the Comprehensive Economic Partnership Agreement (CEPA), being on the way for a bilateral free trade agreement (FTA) that grants duty-free access for Indonesian tuna products to the EU market.

According to the International Trade Centre (ITC), Indonesia is the fourth-largest global tuna supplier in 2024, accounting for 30% of global output and USD 104 million in export value. In total, Indonesia exported USD 1.03 billion of tuna, representing 17% of the country's total seafood exports. The EU–Indonesia FTA is expected to strengthen Indonesia's price competitiveness and expand its access to the EU market, especially in processed and semi-processed tuna products. The influx of Indonesian tuna into the EU is projected to increase supply, heightening competitive pressure on existing exporters. In addition, persistent issues such as IUU compliance, origin tracing, and sustainability certification remain decisive factors for market access.

For Vietnam, the agreement poses a significant challenge. Despite already benefiting from the EVFTA, Vietnam's tuna exports still face tariffs averaging 11,500 tons annually and higher MFN rates compared to Indonesia. The domestic tuna sector continues to struggle with limited raw material supplies, modest processing capacity, high logistics costs, and weakened competitiveness.

Source: Vasep

WOOD AND WOODEN PRODUCTS

Export value to the EU, Aug-2025

Export results to the EU, Aug-2025

VALUE

42

mil. USD

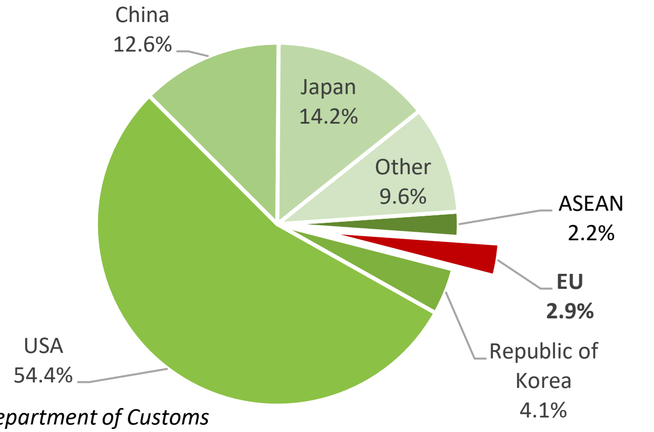
Decrease **9.2%** compared to Jul-2025

Increase **37.1%** compared to Aug-2024

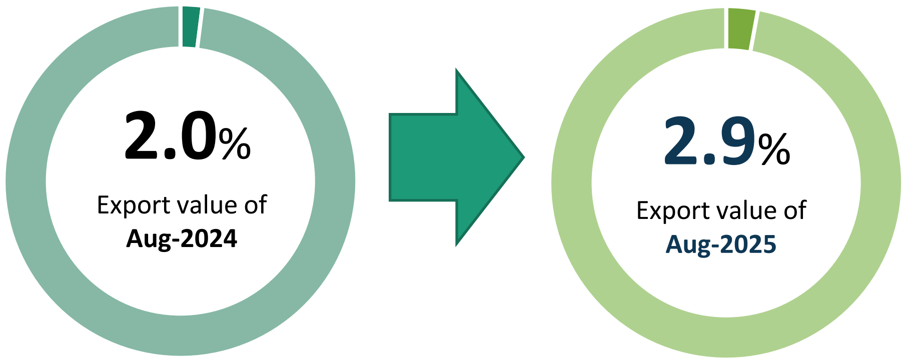
2.1 mil. USD more than compared to monthly average in 2024

❖ Accumulated 8 months of 2025 reaches **359.1** mil. USD, **67.5**% of total 2024

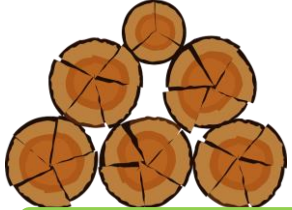
Percentage of export value to the EU, Aug-2025



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

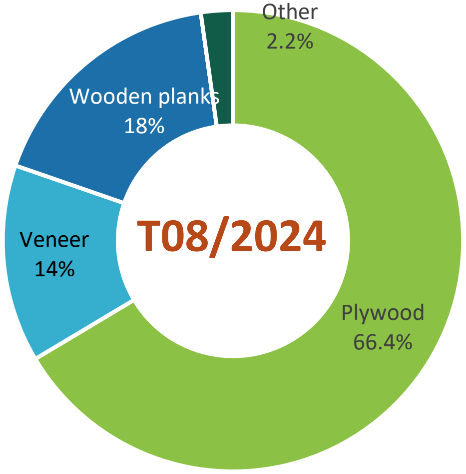


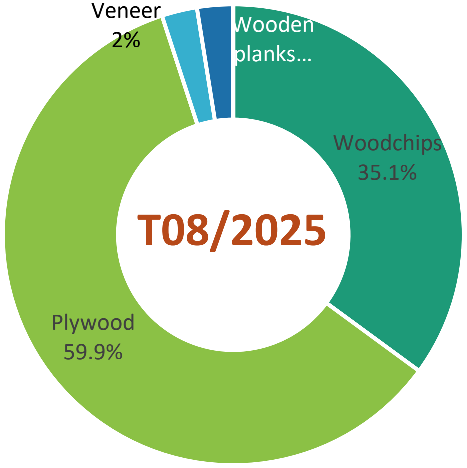
Source: Calculated from data of the Department of Customs



WOOD AND WOODEN PRODUCTS

Structure of exports by products to the EU, Aug-2025





Export results to the EU, Aug-2025

Woodchips

Value: **3.8** mil. USD

Decrease **55**% compared to Jul-2025

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

Plywood

Value: **6.6** mil. USD

Decrease **3**% compared to Jul-2025

Increase **305**% compared to Aug-2024

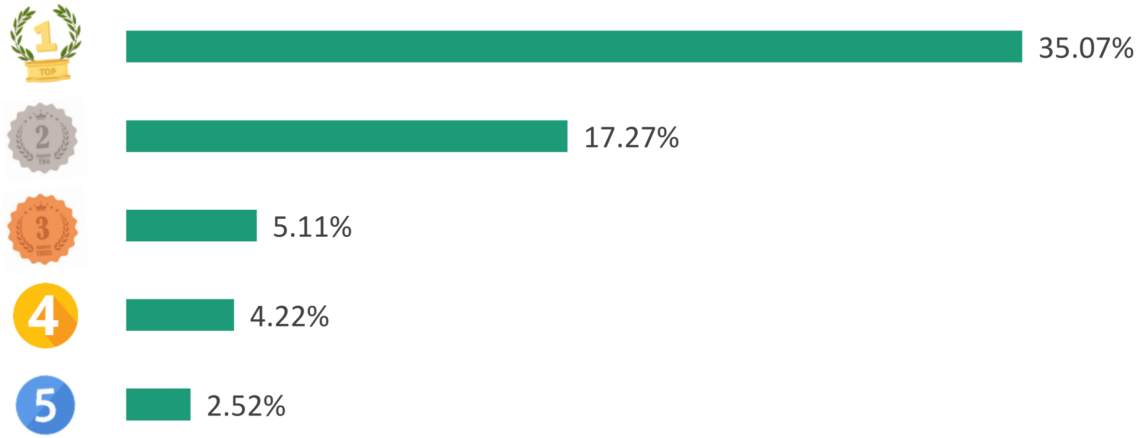
Veneer

Value: **271.5** thousand USD

Decrease **49**% compared to Jul-2025

Decrease **20**% compared to Aug-2024

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



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

Source: Calculated from data of the Department of Customs

SPOTLIGHTS

A recent survey by the German Timber Industry Association (HDH) revealed major financial and administrative challenges businesses may face under the EU Deforestation Regulation (EUDR). Implementation costs for the German wood sector are estimated at EUR 1.8 billion, in addition to annual compliance costs of about EUR 1.2 billion.

The survey also indicated growing concerns among firms about their readiness to comply, noting that only a small share of companies—particularly SMEs—are confident they can meet the EUDR's requirements. HDH Chairman Johannes Schwörer emphasized that without greater regulatory clarity and digital traceability tools across the supply chain, compliance could be unfeasible. The association is urging the EU to adopt a "risk-based" approach, prioritizing high-risk products and simplifying reporting obligations.

Source: GlobalWood

FRUITS AND VEGETABLES (EXPORT)

Export volume and value to the EU, Aug-2025

Export results to the EU, Aug-2025

VALUE

45.6

mil. USD

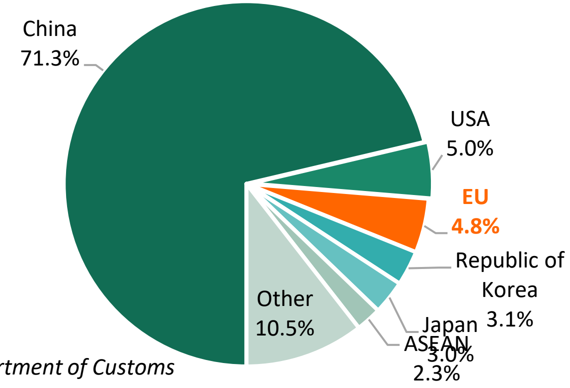
Decrease **5.8%** compared to Jul-2025

Increase **72.6%** compared to Aug-2024

19.3 mil. USD more than compared to monthly average in 2024

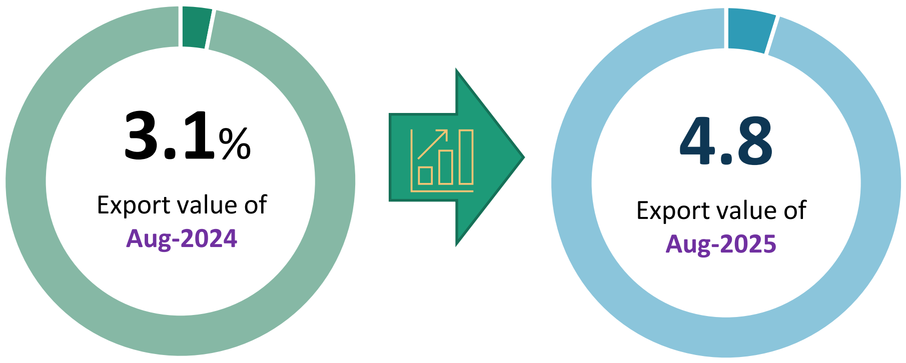
Accumulated 8 months of 2025 reaches **328.9 mil.USD**, **104.1%** of total 2024

Percentage of export value to the EU, Aug-2025



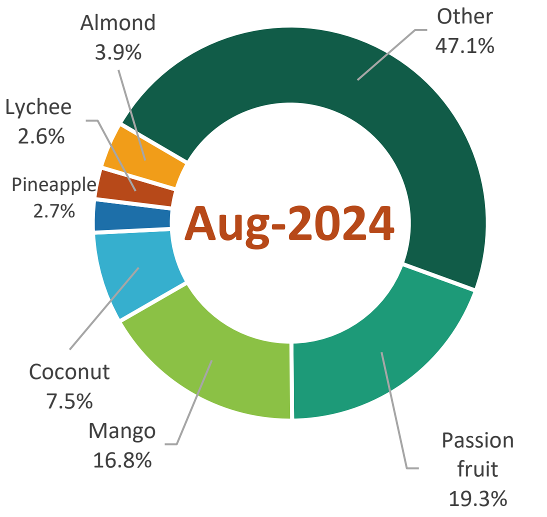
Source: Calculated from data of the Department of Customs

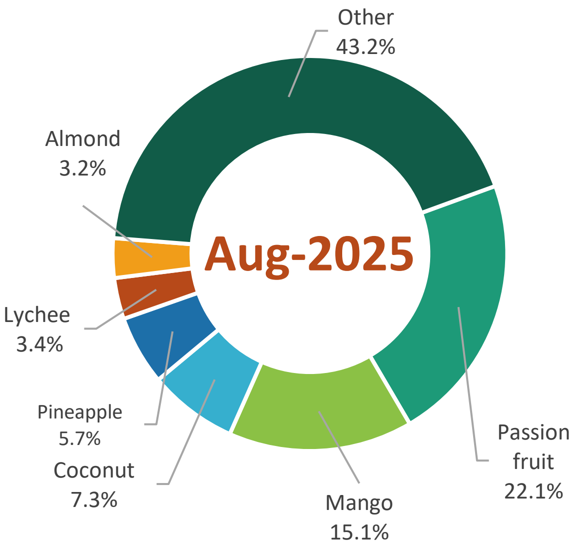
Changes in percentage of export value to the EU, Aug-2025



FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the EU, Aug-2025





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

Passion fruit

Value: 10.1 mil. USD

Increase 31.7% compared to Jul-2025

Increase 97.7% compared to Aug-2024

Mango

Value: 6.9 mil. USD

Increase 0.8% compared to Jul-2025

Increase 54.8% compared to Aug-2024

Coconut

Value: 3.3 mil. USD

Decrease 5.5% compared to Jul-2025

Increase 67.2 compared to Aug-2024

Pineapple

Value: 2.6 mil. USD

Decrease 23.7% compared to Jul-2025

Increase 259.7% compared to Aug-2024

Lychee

Value: 1.5 mil. USD

Decrease 39.0% compared to Jul-2025

Increase 123.4% compared to Aug-2024

Almond

Value: 1.5 mil. USD

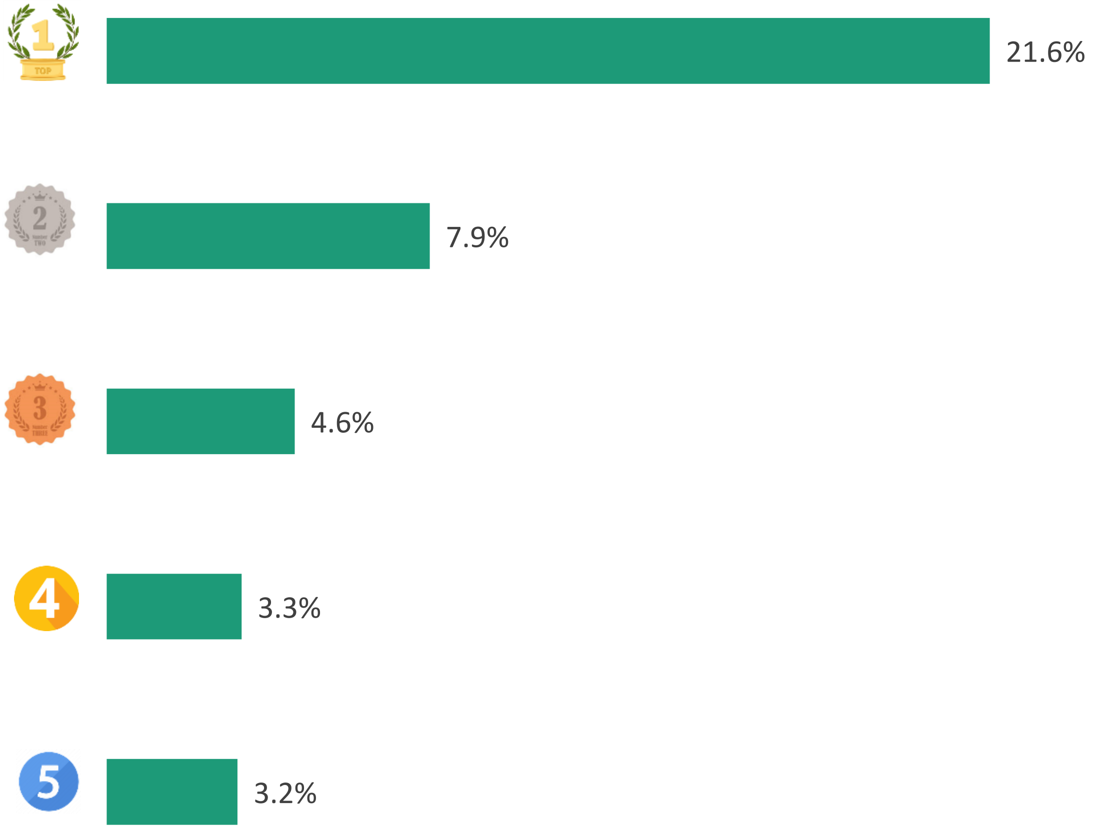
Decrease 12.7% compared to Jul-2025

Increase 45.1% compared to Aug-2024

Source: Calculated from data of the Department of Customs

FRUITS AND VEGETABLES (EXPORT)

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



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

Source: Calculated from data of the Department of Customs

FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the EU, Aug-2025

Import results from the EU, Aug-2025

VALUE

2.8

mil. USD

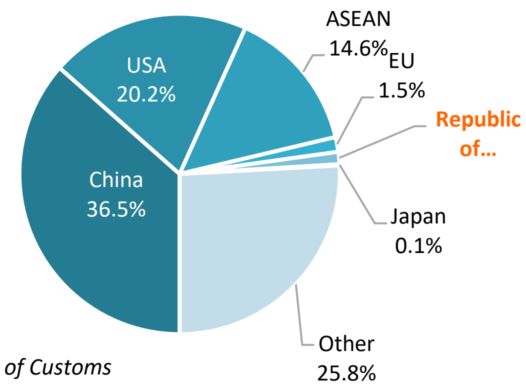
Increase **33.4%** compared to Jul-2025

Decrease **27.3%** compared to Aug-2024

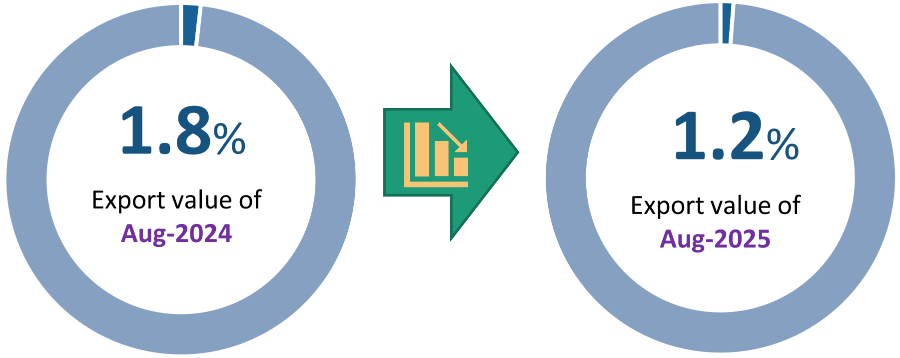
1.65 mil. USD less than compared to monthly average in 2024

Accumulated 8 months of 2025 reaches **33.3 mil. USD**, **61.8%** of total 2024

Percentage of import value from the EU, Aug-2025



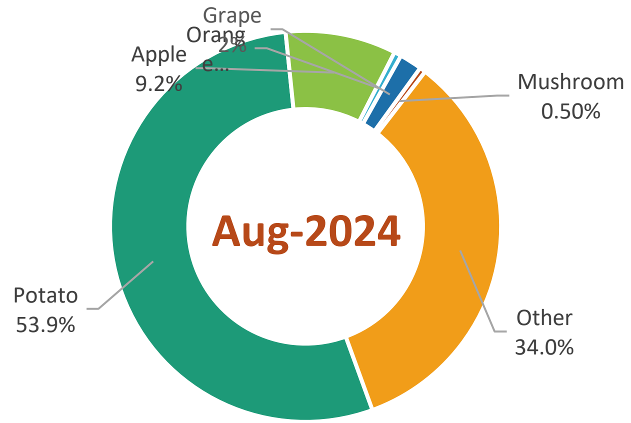
Changes in percentage of import value from the EU, Aug-2025

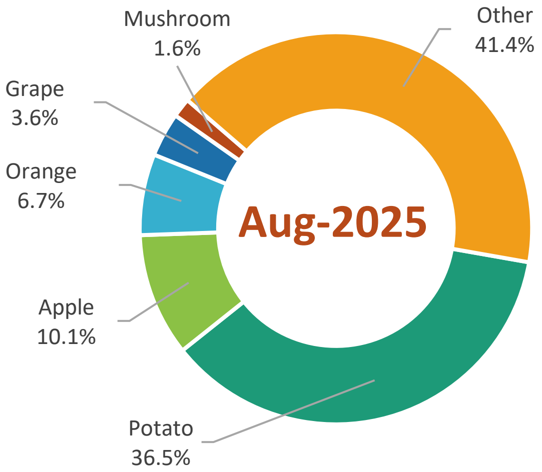


Source: Calculated from data of the Department of Customs

FRUITS AND VEGETABLES (IMPORT)

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





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

Potato

Value: 1.0 mil. USD

Increase 24.2% compared to Jul-2025

Decrease 50.8% compared to Aug-2024

Apple

Value: 288.4 thousand USD

Increase 106.5% compared to Jul-2025

Decrease 19.4% compared to Aug-2024

Orange

Value: 190.2 thousand USD

Decrease 9.8% compared to Jul-2025

Increase 713.4% compared to Aug-2024

Source: Calculated from data of the Department of Customs

SPOTLIGHTS

France's 2025 potato output will reach the highest level in the decade

France's potato production in 2025 is forecast to hit a 10-year record high of 8.5 million tons, up nearly 900,000 tons year-on-year, driven by a 25% expansion in planting area to 197,000 ha. Average yields are expected to reach 43 tons/ha, about 5% lower than in 2024.

The French National Union of Potato Producers (UNPT) warned of a potential supply surplus, especially as export demand for processed products remains weak. UNPT urged farmers to strictly adhere to contract terms, avoid selling below-cost, and maintain product quality and standards to sustain value in the sector.

UNPT also reaffirmed its commitment to supporting producers, market analysis, and developing new outlets for contracted volumes, emphasizing strategies to secure profitability and sustainability for France's potato industry.

Source: Freshplaza.com

SPOTLIGHTS

Dutch onion exports rebound with 17% growth

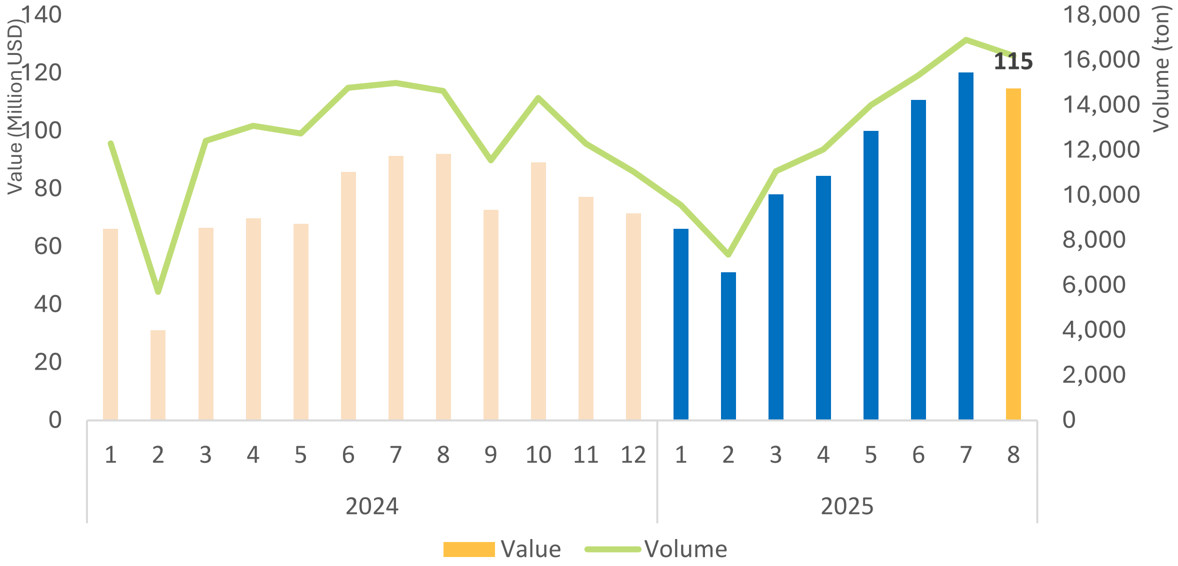
The Netherlands' onion exports saw a strong recovery in the 2024/2025 season after two consecutive years of decline, reaching 1.238 million tons, up 17% year-on-year. The export growth is due to abundant domestic harvests, with yellow onion exports at 1.3 million tons (+13%) and red onions exceeding 203,000 tons (+30%). Key producing regions include Flevoland, North Brabant, and Zeeland.

In export markets, Senegal led with 181,000 tons, followed by Ivory Coast (≈180,000 tons, +77.5%) and the UK (+14%). Notably, Israel surged to seventh place with a 71% increase. Across Europe, demand also strengthened, with France standing out at +55.4% growth in imports of Dutch onions.

Source: Freshplaza.com

CASHEW NUTS

Export volume and value to the EU, Aug-2025



Export results to the EU, Aug-2025

VALUE

114.7 *mil. USD*

Decrease **4.6%** compared to Jul-2025

Increase **24.7%** compared to Aug-2024

41.3 mil. USD more than ompared to monthly average in 2024

❖ Accumulated 8 months of 2025 reaches 726 tr.USD, 82% of total 2024

VOLUME

16.2 *thousand tons*

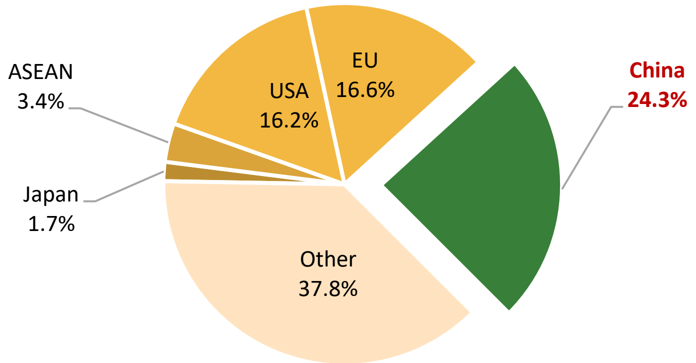
Decrease **4.2%** compared to Jul-2025

Increase **10.7%** compared to Aug-2024

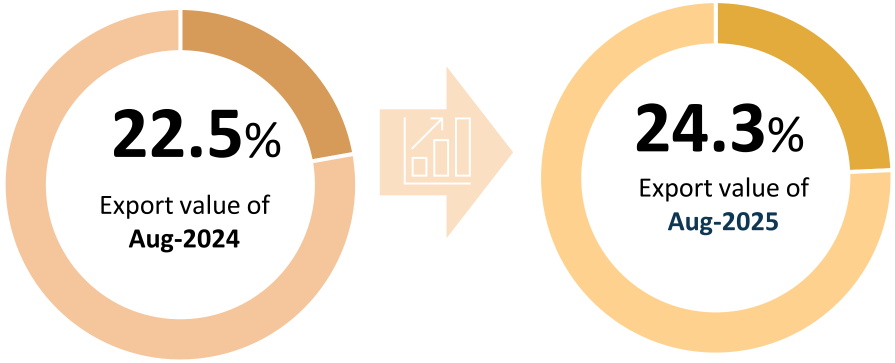
3.7 thousand tons more than ompared to monthly average in 2024

❖ Accumulated 8 months of 2025 reaches 102 thousand tons, 68% of total 2024

Percentage of export value to the EU, Aug-2025



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



Source: Calculated from data of the Department of Customs

CASHEW NUTS

Structure of exports by products to the EU, Aug-2025

Export results to the EU, Aug-2025

Shelled fresh cashew nuts

Value: **111.4** mil. USD

Decrease **4.8**% compared to Jul-2025

Increase **23.4**% compared to Aug-2024

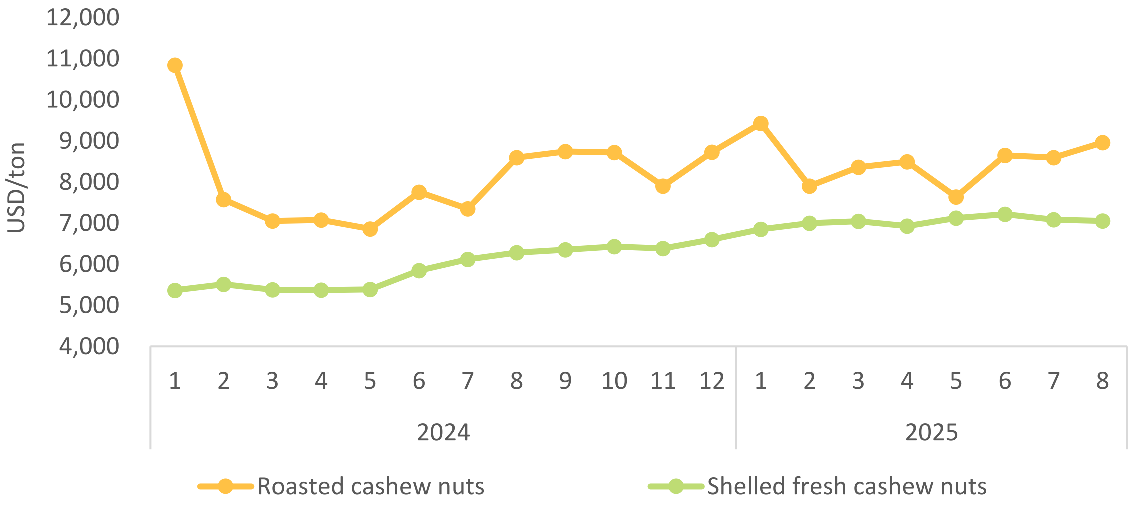
Roasted cashew nuts

Value: **3.3** mil. USD

Increase **0.7**% compared to Jul-2025

Increase **90.1**% compared to Aug-2024

Average export price to the EU, Aug-2025



Shelled fresh cashew nuts

The average export price in Aug-2025 is **7,056** USD/ton; decrease **0.3**% compared to the previous month; and increase **12.3**% compared to the same month 2024.

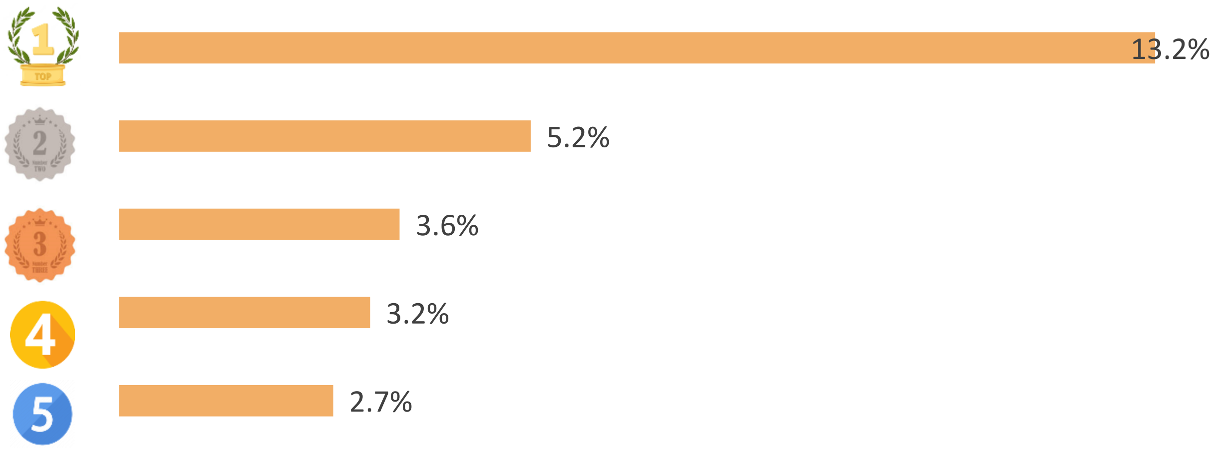
Roasted cashew nuts

The average export price in Aug-2025 is **8,957** USD/ton; increase **4.2**% compared to the previous month; and increase **4.3**% compared to the same month 2024.

Source: Calculated from data of the Department of Customs

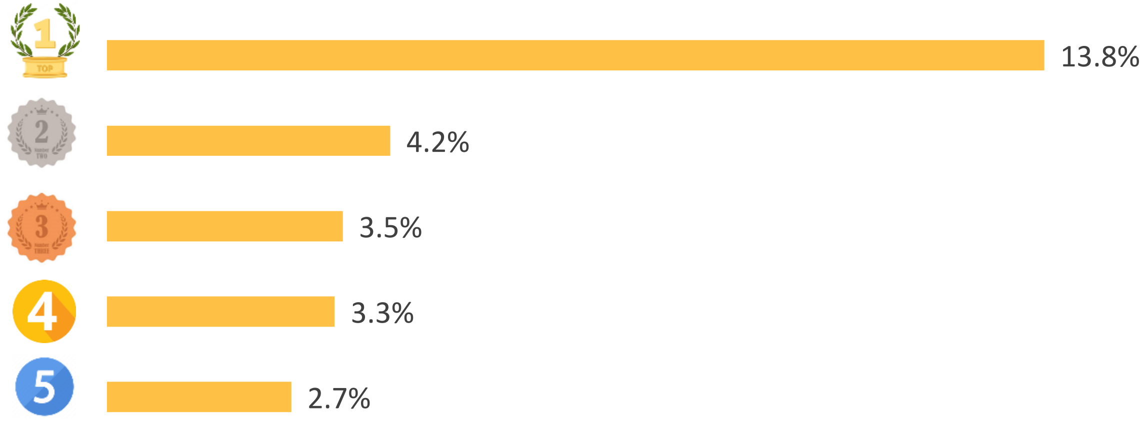
CASHEW NUTS

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

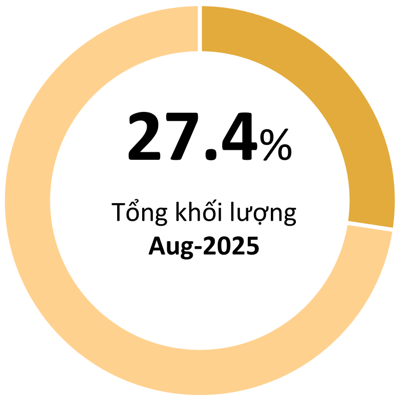


Value ratio of TOP 5 export enterprises to the EU, Aug-2025

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



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



Source: Calculated from data of the Department of Customs

SPOTLIGHT

Cambodia exports processed cashew nuts to Italy for the first time

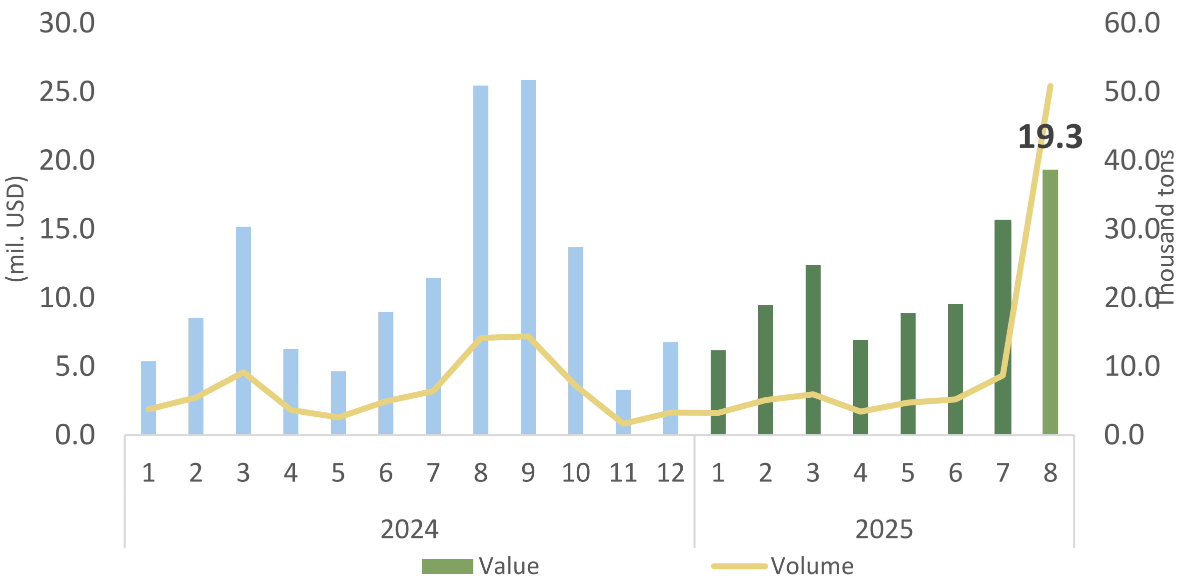
On September 4, 2025, Cambodia exported its first shipment of processed cashew nuts (14 tons) to Italy, conducted by M.P.L Agro Products. Previously, the company had shipped over 100 tons of raw cashews to Europe and plans to expand to Malaysia, Singapore, and the UK.

Currently ranked second globally in raw cashew production, Cambodia views this milestone as a step toward establishing its reputation for high-quality processed products. The first shipment to Italy is expected to enhance value addition, improve competitiveness, and build credibility in premium export markets traditionally dominated by established suppliers.

Source: freshnewsasia.com

RUBBER

Export volume and value to the EU, Aug-2025



Export results to the EU, Aug-2025

VALUE

19.3 *mil. USD*

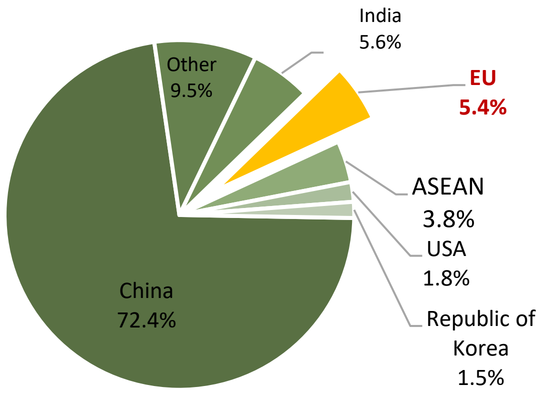
- Increase **24%** compared to Jul-2025
- Decrease **65%** compared to Aug-2024
- **4.5** mil. USD more than compared to monthly average in 2024
- Accumulated 8 months of 2025 reaches **88.2** mil. USD, **49.7%** of total 2024

VOLUME

50.8 *thousand tons*

- Increase **486%** compared to Jul-2025
- Increase **68%** compared to Aug-2024
- **42.5** thousand tons more than compared to monthly average in 2024
- Accumulated 8 months of 2025 reaches **87** thousand tons, **87.1%** of total 2024

Percentage of export value to the EU, Aug-2025

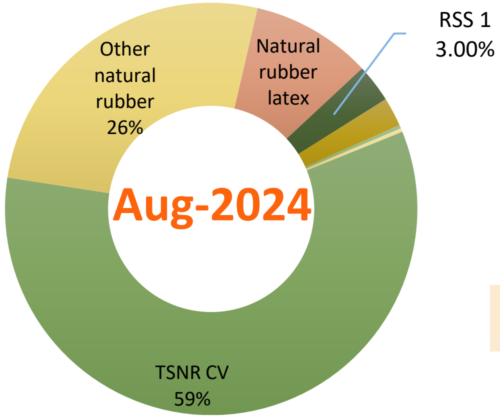


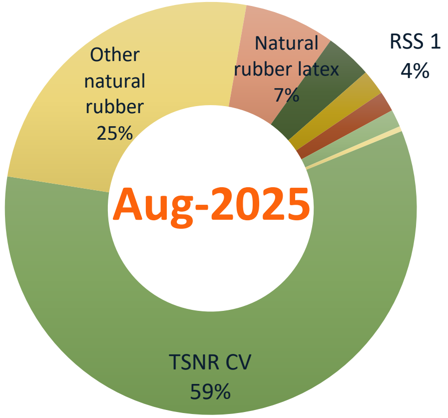
Changes in percentage of export value to the EU, Aug-2025

Source: Calculated from data of the Department of Customs

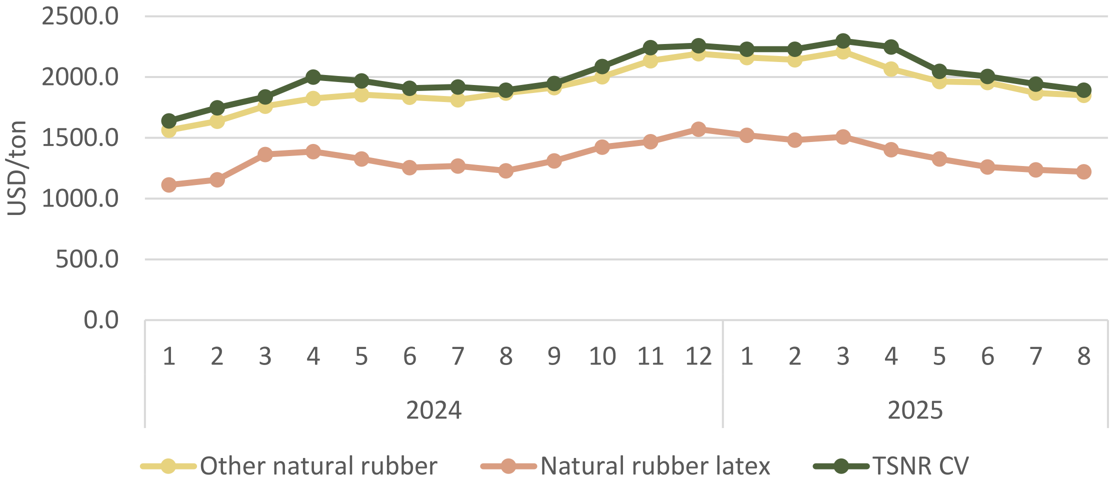
RUBBER

Structure of exports by products to the EU, Aug-2025





Average export price to the EU, Aug-2025



Export results to the EU, Aug-2025

Other natural rubber

Value: **4.9** mil. USD

Increase **34**% compared to Jul-2025

Decrease **27**% compared to Aug-2024

TSNR CV

Value: **11.3** mil. USD

Increase **28**% compared to Jul-2025

Decrease **24**% compared to Aug-2024

Natural rubber latex

Value: **1.4** mil. USD

Decrease **26**% compared to Jul-2025

Decrease **43**% compared to Aug-2024

Other natural rubber

The average export price in Aug-2025 is **1,849** USD/ton; decrease **1,1**% compared to the previous month; and decrease **0,01**% compared to the same month 2024.

TSNR CV

The average export price in Aug-2025 is **1,893** USD/ton; decrease **2,6**% compared to the previous month; and tăng **0,2**% compared to the same month 2024.

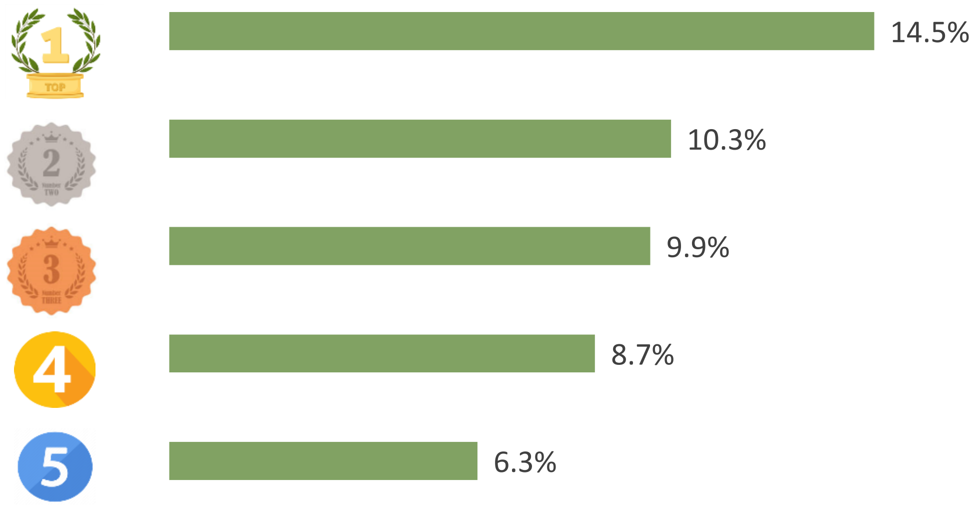
Natural rubber latex

The average export price in Aug-2025 is **1,222** USD/ton; decrease **1,2**% compared to the previous month; and decrease **6,1**% compared to the same month 2024.

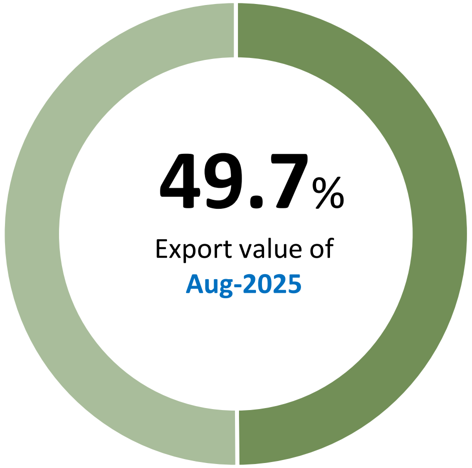
Source: Calculated from data of the Department of Customs

RUBBER

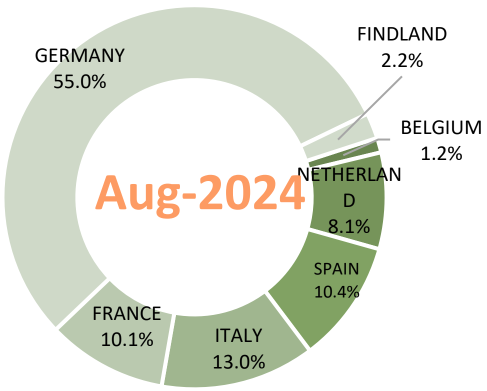
TOP 5 export enterprises by value to the EU, Aug-2025

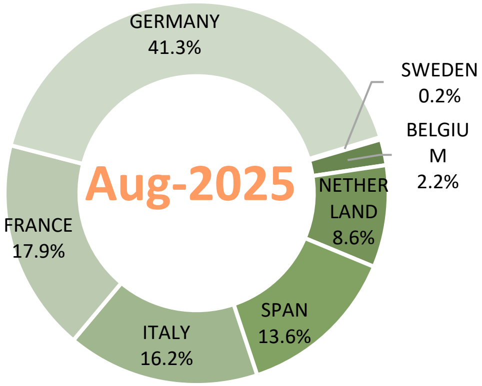


Value ratio of TOP 5 export enterprises to the EU, Aug-2025



Changes in percentage of export value by countries, Aug-2025





Source: Calculated from data of the Department of Customs

SPOTLIGHT

Chu Se – Kampong Thom rubber certified as the world's first PEFC EUDR-compliant producer

On September 15 in Phnom Penh, Chu Se – Kampong Thom Rubber Co. (CRCK), a subsidiary of Vietnam Rubber Group (VRG), became the world's first enterprise to receive PEFC EUDR DDS certification for compliance with the EU Deforestation Regulation (EUDR).

This recognition, described as a "green passport" for rubber, reinforces Vietnam–Cambodia's sustainable access to the EU market. With over 15 years of development, CRCK has demonstrated leadership in sustainable production and technological innovation in the rubber industry.

The PEFC EUDR DDS certification confirms independent verification of CRCK's ability to trace origin data to plot level and operate a transparent due diligence system. Under EUDR rules, all rubber products imported into the EU must ensure deforestation-free sourcing and traceability to precise geolocations for plots established after December 31, 2020.

Source: thanhnien.vn

ISPAE

AGREINFOS

For feedback, please send to:

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Zalo