

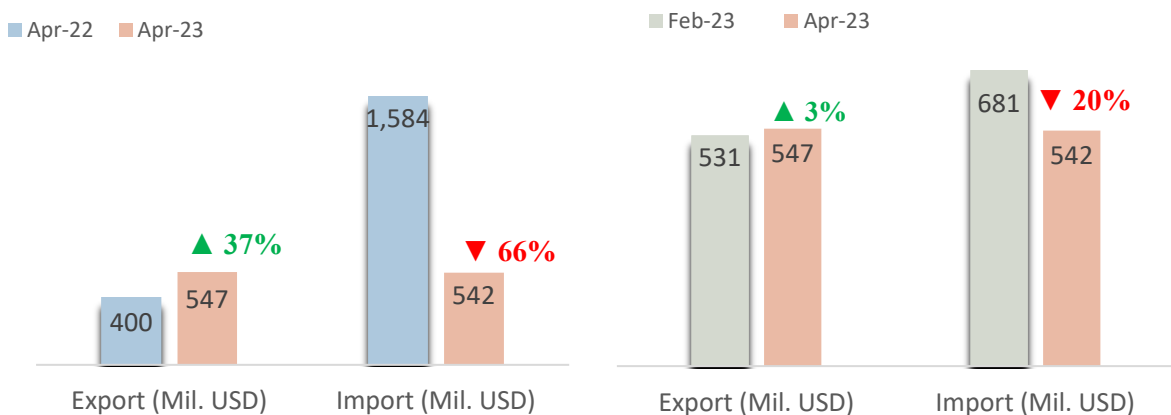
MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO **ASEAN MARKET**

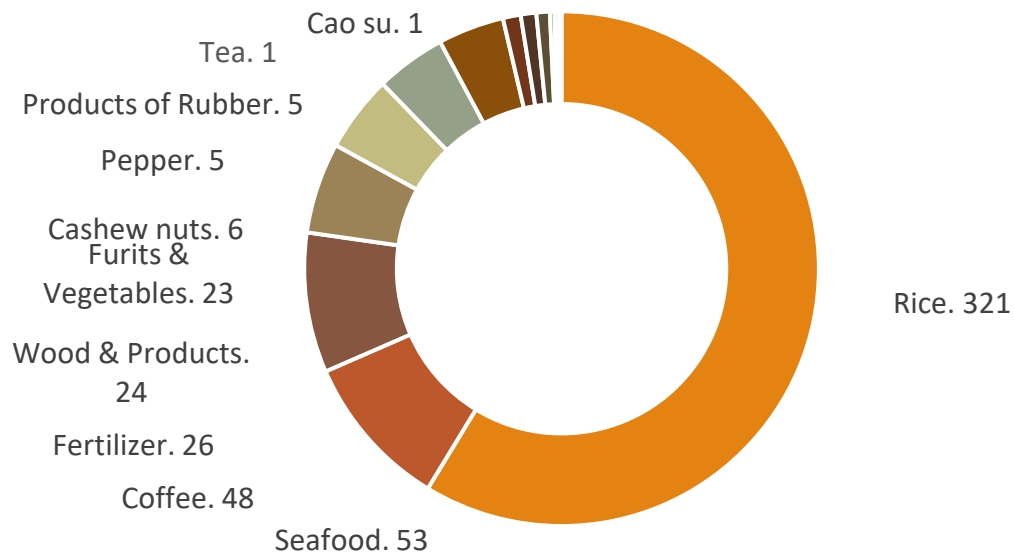


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO THE ASEAN IN APRIL 2023

AFF product import - export turnover between Vietnam and ASEAN. Apr-2023



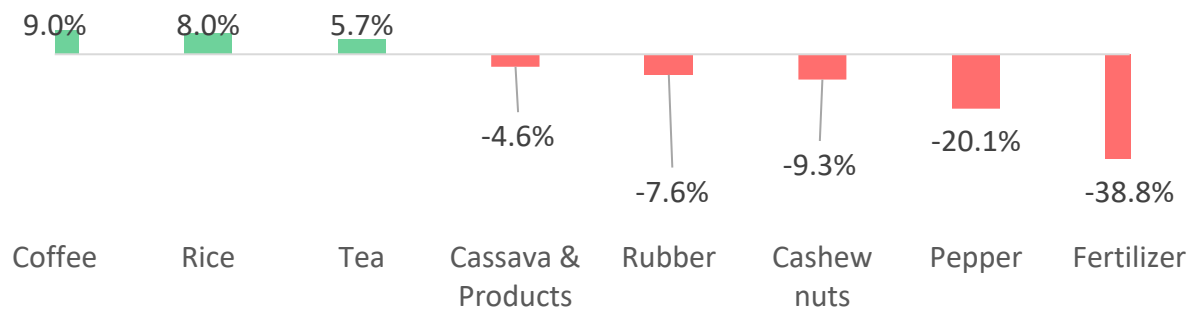
Key AFF product export value to ASEAN. Apr-2023



Change key AFF product export value to ASEAN in Apr-2023 compared to Apr-2022



Changes in average export value of key AFF products to ASEAN in Apr-2023 compared to Apr-2022



Source: Calculated from data of the General Department of Customs

Unit: Mil. USD

SPOTLIGHTS



ASEAN to start negotiations on digital economy pact in Q3



The 22nd ASEAN Economic Community Council Meeting

Asean to start negotiations on digital economy pact in Q3

The Indonesian Minister of Coordination for Economic Affairs, Airlangga Hartarto, recently announced that ASEAN member countries have agreed to expedite the commencement of negotiations for the ASEAN Digital Economy Framework Agreement (DEFA) in the third quarter of 2023.

The economic growth of ASEAN is estimated to reach 4.7% in 2023 and is forecasted to further increase to 5% in 2024. Meanwhile, the region's digital economy is predicted to reach \$330 billion in terms of total merchandise value by 2025, up from \$194 billion in the previous year.

DEFA is expected to establish a safe and healthy environment for developing the digital economy while addressing consumer protection and data privacy concerns. It is anticipated to be the foundation for building a robust and comprehensive digital economy in ASEAN, facilitating trade development among ASEAN countries..



Source: Trungtamwto.vn

The 22nd ASEAN Economic Community Council Meeting

On May 7, 2023, the 22nd ASEAN Economic Community Council Meeting was held in Jakarta, Indonesia.

The meeting reviewed the progress of implementing Indonesia's priority economic cooperation initiatives as the ASEAN Chair in

2023, focusing on three main directions: (i) Recovery and Reconstruction, (ii) Digital Economy, and (iii) Sustainability.

The meeting also acknowledged the progress in implementing recommendations to build a solid and resilient ASEAN community..

Source: Ministry of Industry and Trade





RICE

Export volume and value of rice to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

VALUE

325.3 Mil. USD

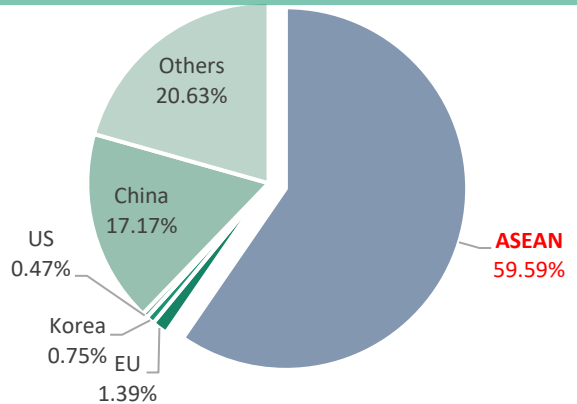
- ↗ Increase **13.7%** compared to Feb-2023
- ↗ Increase **148.8%** compared to Apr-2022
- ↗ **187.1** Mil. USD more than the monthly average rate in 2022
- ◇ Accumulated 4 months of 2023 reaches **913.1** Mil.USD, **55.1%** of total 2022

VOLUME

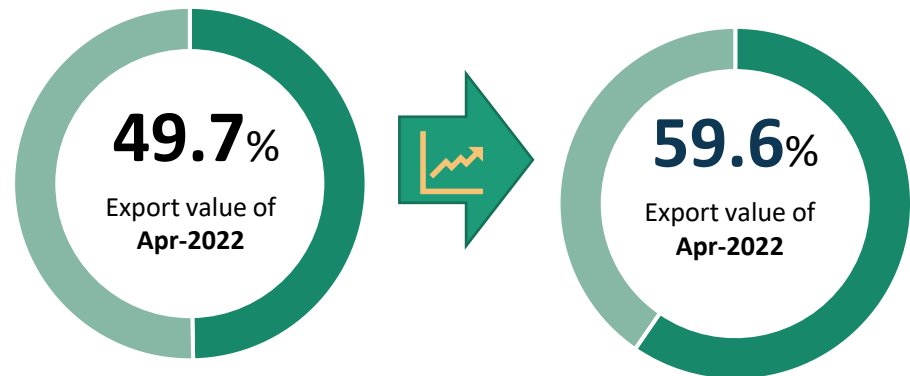
657.6 thousand tons

- ↗ Increase **14.4%** compared to Feb-2023
- ↗ Increase **128.5%** compared to Apr-2022
- ↗ **365.4** thousand tons more than the monthly average rate in 2022
- ◇ Accumulated 4 months of 2023 reaches **1.8** Thousand tons, **52.2%** of total 2022

Percentage of export value to the ASEAN, Apr-2023



Changes in percentage of export value to the ASEAN, Apr-2023

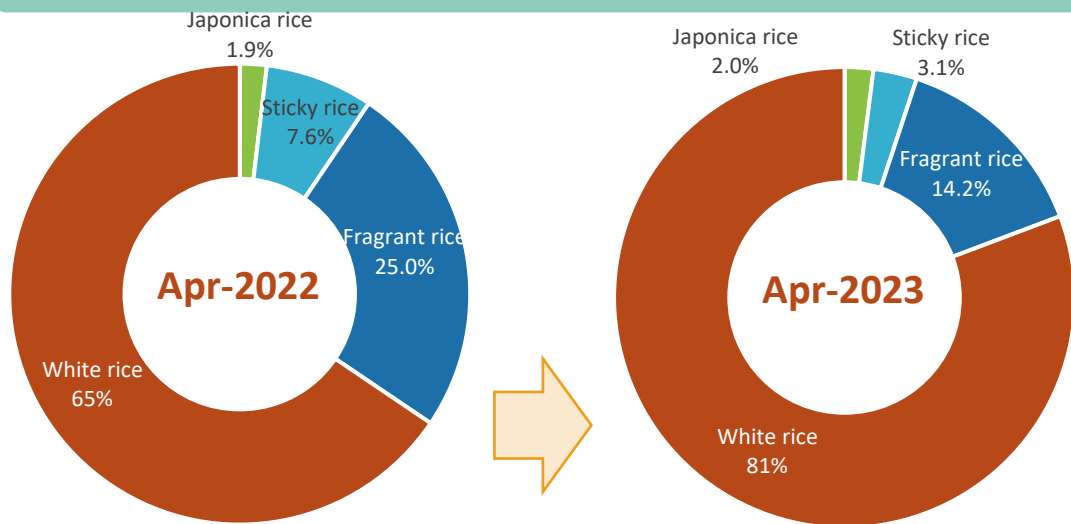


Source: Calculated from data of the General Department of Customs

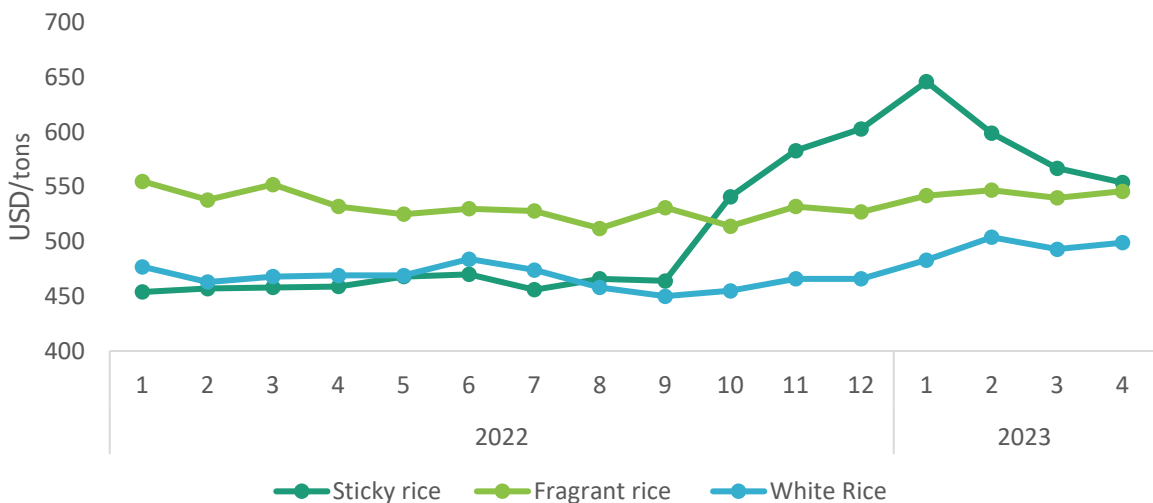


RICE

Structure of exports by products to the ASEAN



Average export rice price to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023



White Rice

Value: **262.6** Mil. USD
 Increase **36%** compared to Feb-2023
 Increase **192%** compared to Apr-2022

Fragrant rice

Value: **46.1** Mil. USD
 Decreases **38%** compared to Feb-2023
 Increase **35%** compared to Apr-2022

Sticky rice

Value: **10.0** Mil. USD
 Decreases **30%** compared to Feb-2023
 Decreases **4%** compared to Apr-2022

Sticky Rice

The average export in Apr-2023 is **554** USD/Tons; decreases **2%** compared to the previous month; but increase **21%** compared to the same month of 2022.

Fragrant rice

The average export in Apr-2023 is **546** USD/Tons; increase **1%** compared to the previous month; and increase **3%** compared to the same month of 2022.

White rice

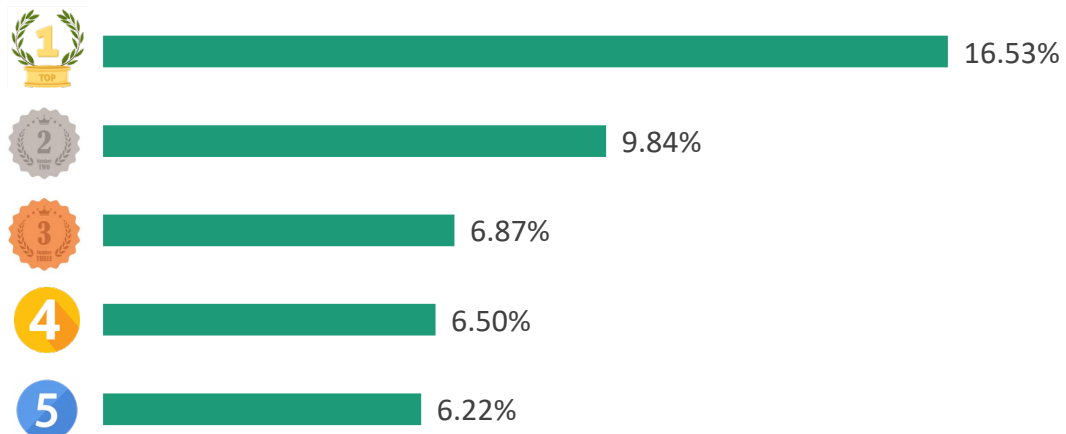
The average export in Apr-2023 is **499** USD/Tons; increase **1%** compared to the previous month; and increase **6%** compared to the same month of 2022.

Source: Calculated from data of the General Department of Customs

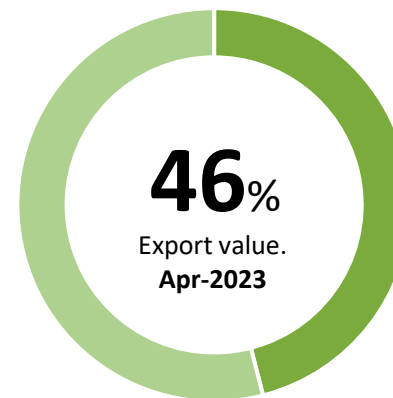


RICE

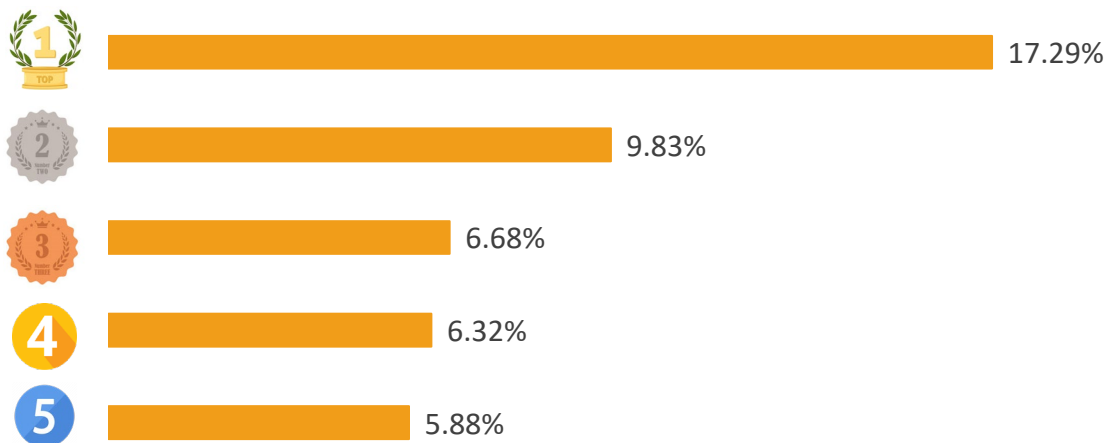
TOP 5 export enterprises by value, Apr-2023



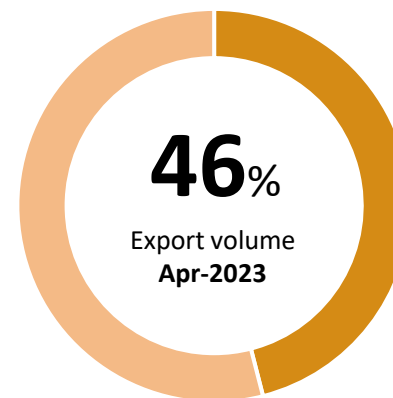
Value ratio of TOP 5 export enterprises, Apr-2023



TOP 5 export enterprises by volume, Apr-2023



Volume ratio of TOP 5 export enterprises, Apr-2023





RICE

SPOTLIGHTS

01

Thailand's rice exports in the first three months of 2023 reached 38.06 billion THB (over 1 billion USD), an increase of 29.26% compared to the same period in 2022. Among them, Iraq is the largest market for Thai rice, accounting for 16.38% of Thailand's total rice exports, followed by Indonesia (13.08%), the United States (8.62%), South Africa (8.24%), and Senegal (5.86%).

Source: Bnews

02

The Myanmar Rice Federation (MRF) reported that rice exports from Myanmar decreased to 47,888 tons in April 2023, compared to 144,035 tons of rice exported during the same period last year. Malaysia was the top buyer of Myanmar's rice in April 2023 with 8,050 tons, while Belgium was the leading buyer of Myanmar's broken rice with 15,725 tons..

Source: Xinhuanet

03

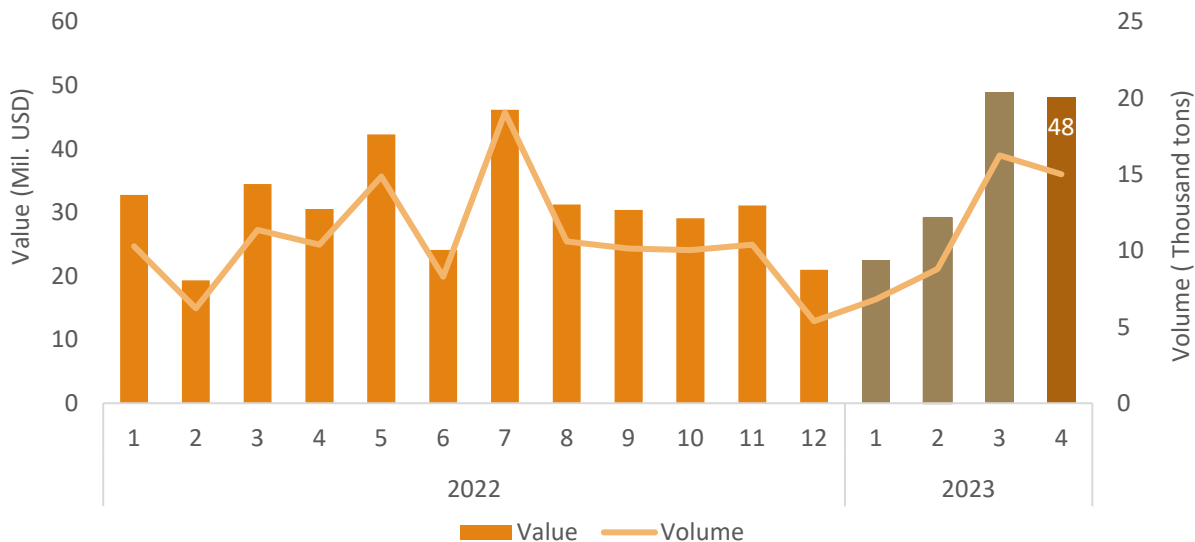
The National Water Resources Office of Thailand has announced that farmers must plant only one rice crop in the upcoming season due to below-average rainfall caused by the El Nino weather pattern. The rainy season, typically starting in the third week of May, is expected to be delayed this year.

Source: BangkokPost



COFFEE

Export volume and value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

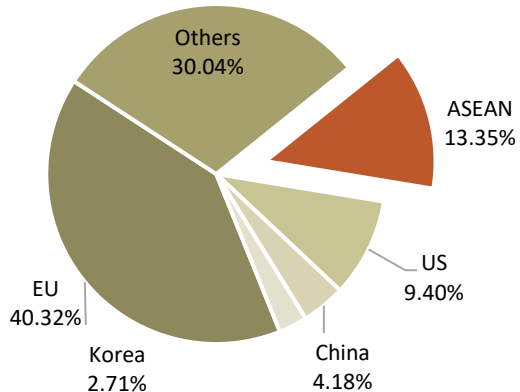
VALUE
48.1 Mil. USD

- ▼ Decreases **1.6%** compared to Feb-2023
- ↗ Increase **57.2%** compared to Apr-2022
- ↗ **17 Mil. USD** more than the monthly average rate in 2022
- ◇ Accumulated 4 months of 2023 reaches **148.6** Mil.USD **39.9%** of total 2022

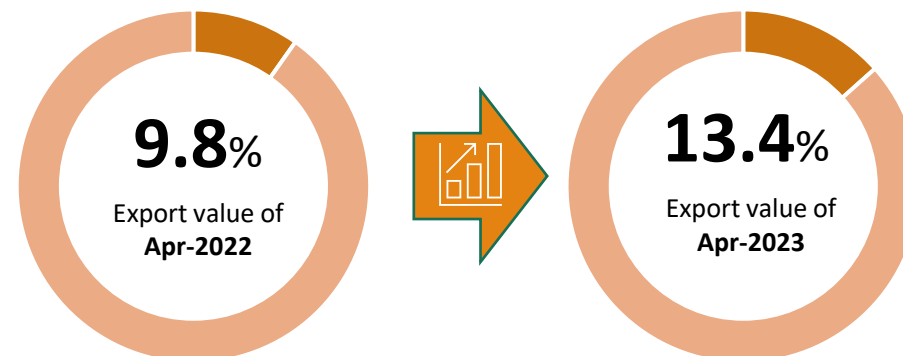
VOLUME
15 Thousand Tons

- ▼ Decreases **7.7%** compared to Feb-2023
- ↗ Increase **44.2%** compared to Apr-2022
- ↗ **4.4 thousand ton** more than the monthly average rate in 2022
- ◇ Accumulated 4 months of 2023 reaches **40.9** Thousand tons. **36.9%** of total 2022

Percentage of export value to the ASEAN, Apr-2023

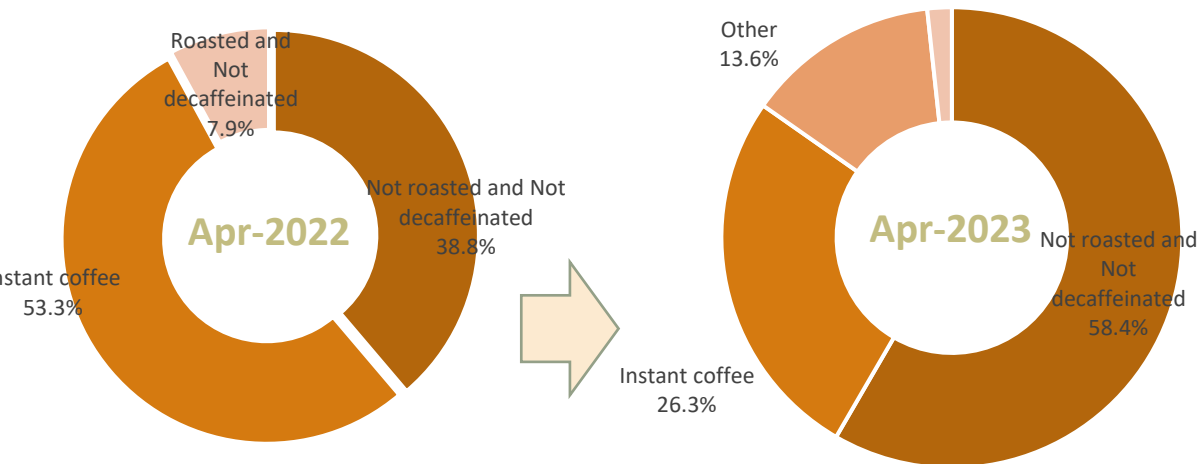


Changes in percentage of export value to the ASEAN, Apr-2023

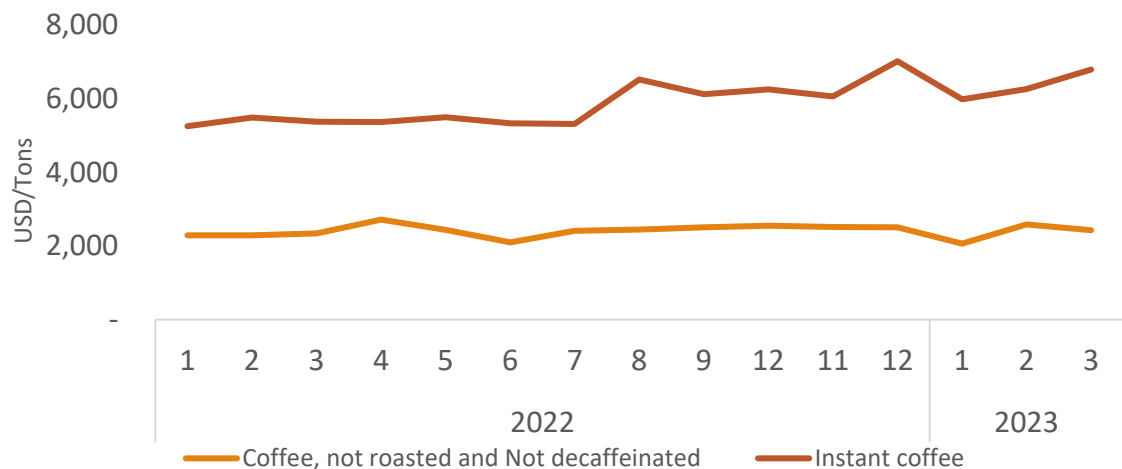


COFFEE

Structure of exports by products to the ASEAN



Average export price to the ASEAN, Apr 2023



Export results to the ASEAN. Apr-2023



Coffee, not roasted and Not decaffeinated

Value: **28** Mil. USD
 Increase **8.6%** compared to Feb-2023
 Increase **73.5%** compared to Apr-2022



Instant coffee

Value: **12.7** Mil. USD
 Decreases **24.4%** compared to Feb-2023
 Increase **7.5%** compared to Apr-2022



Coffee, Roasted and Not decaffeinated

Value: **0.8** Mil. USD
 Decreases **2.9%** compared to Feb-2023
 Increase **193%** compared to Apr-2022

Instant coffee

The average export in Apr-2023 is **6,202** USD/Ton; decrease of **8.7%** compared to the previous month; but increase of **18.8%** compared to the same month of 2022.

Coffee, not roasted and Not decaffeinated

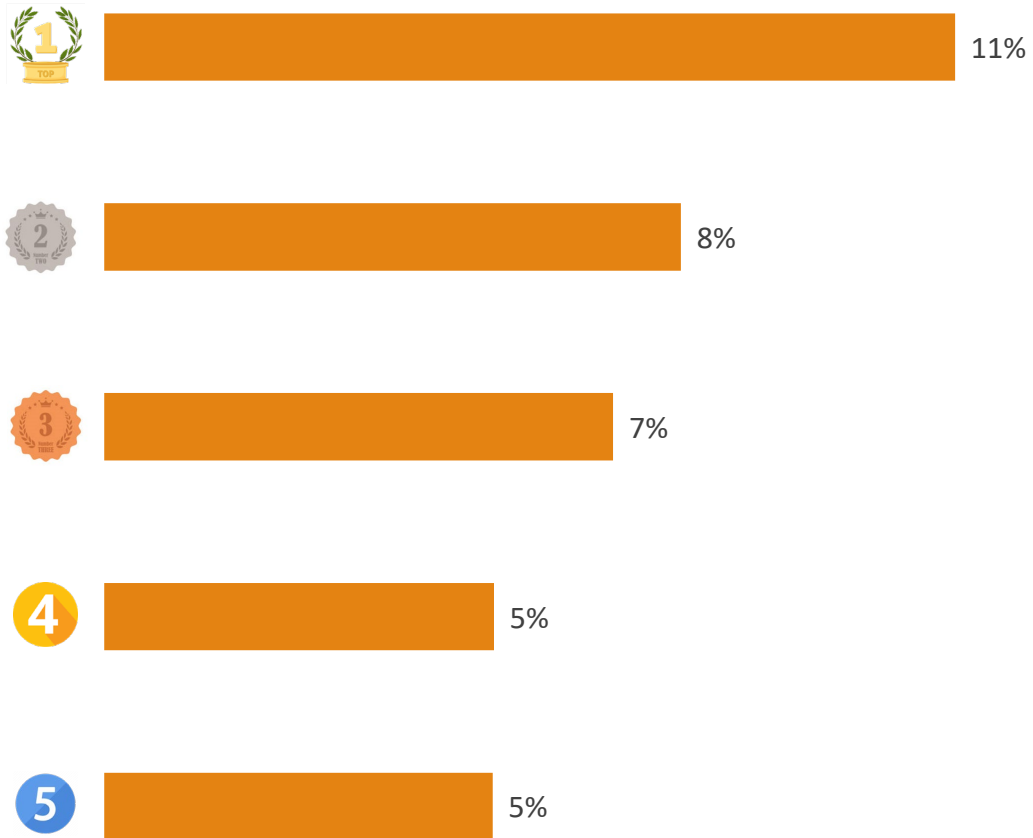
The average export in Apr-2023 is **2,887** USD/Tons; increase **15.5%** compared to the previous month; but decreases **90.3%** compared to the same month of 2022.

Source: Calculated from data of the General Department of Customs

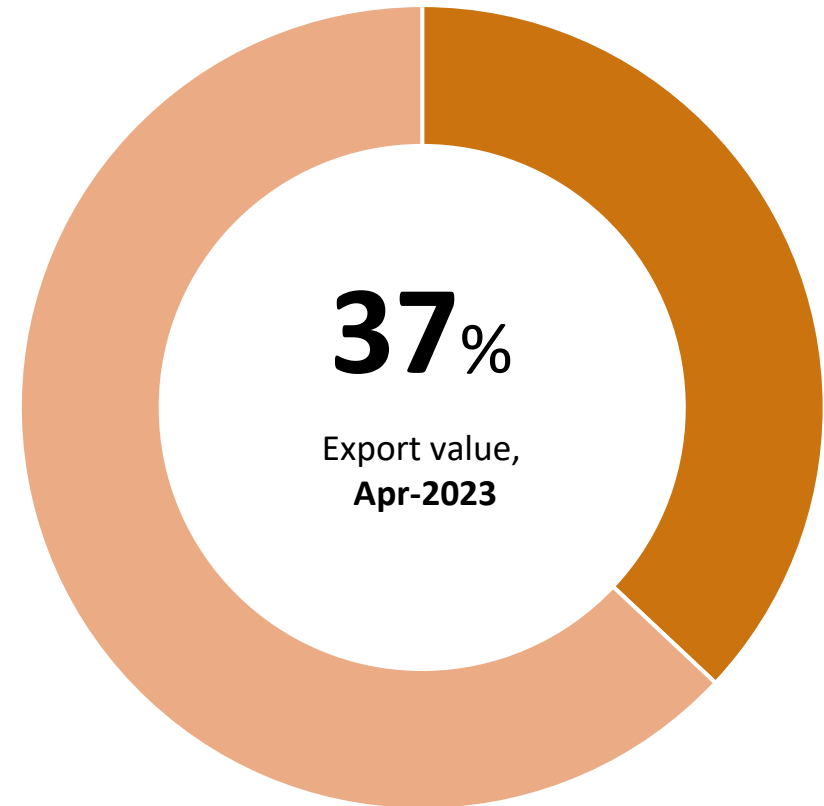


COFFEE

TOP 5 export enterprises by value, Apr-2023



Value ratio of TOP 5 export enterprises to, Apr-2023





SPOTLIGHTS

01

Indonesia's coffee production drops sharply in 2023

In Indonesia, the world's third-largest producer of Robusta coffee, prolonged heavy rainfall has raised concerns about decreased coffee yield. The Association of Indonesian Coffee Exporters and Industries has stated that Indonesia's coffee production in 2023 is expected to reduce by 20% compared to the previous year, reaching only 9.6 million bags due to damages caused by excessive rain in coffee-growing regions.

Source: Vietnambiz (5/2023)

02

Indonesian coffee exports in the crop year 2023/24 decreased by about 32%

According to the USDA, it is forecasted that Indonesia's green coffee exports will decrease by approximately 32% in the 2023/24 crop year compared to the previous year, reaching around 5.2 million bags. The significant decline in the country's coffee production has a substantial impact on the supply of exports.

The coffee acreage in Indonesia remains stable at 1.2 million hectares and is expected to increase by about 3,000 hectares in 2023. Approximately 60-70% of the total coffee cultivation area is located in Sumatra.

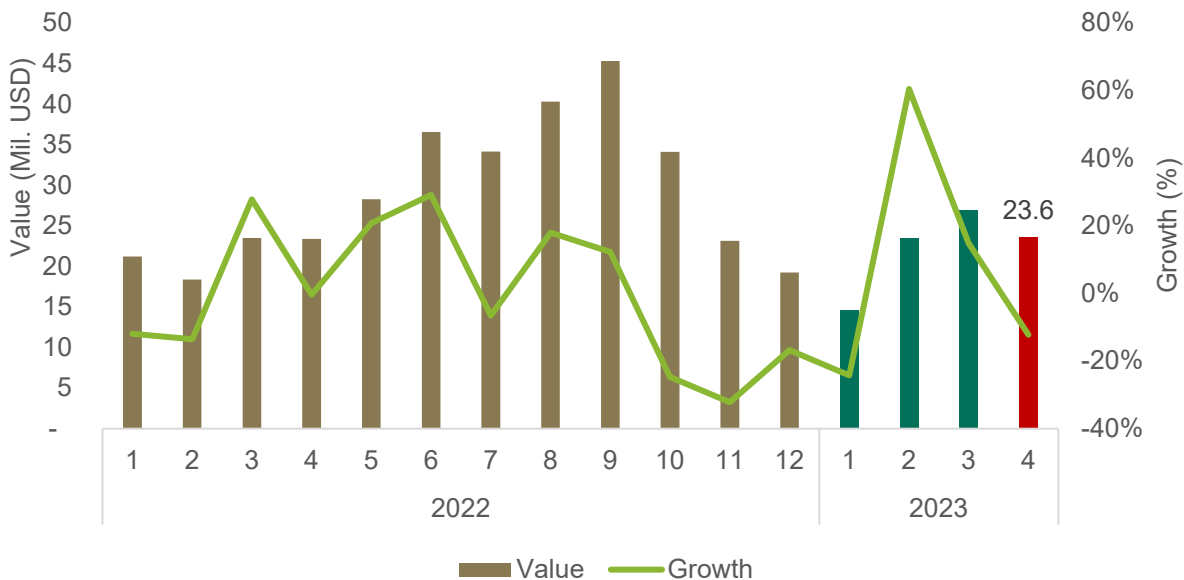
Source: USDA (5/2023)





FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

VALUE

23.6

Mil. USD

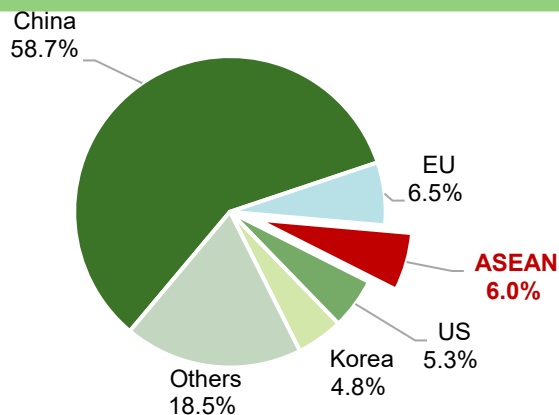
Decreases **12.2%** compared to Feb-2023

Increase **14.5%** compared to Apr-2022

5.3 Mil. USD less than the monthly average of 2022

Accumulated 4 months of 2023 reaches **88.6** Mil.USD; **25.5%** of total 2022

Percentage of export value to the ASEAN, Apr-2023



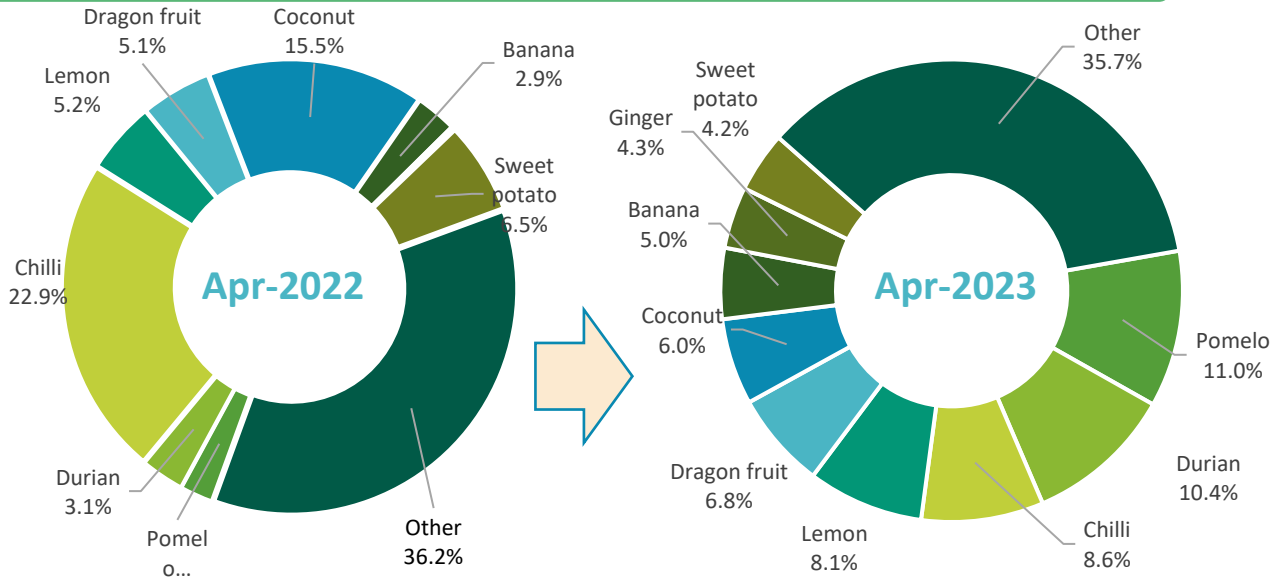
Changes in percentage of export value to the ASEAN, Apr-2023





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Apr-2023



Export results of some main products to the ASEAN, Apr-2023



Pomelo

Value: **2.6** Mil. USD
 Decreases **28.4%** compared to Feb-2023
 Increase **369.5%** compared to Apr-2022



Durian

Value: **2.5** Mil. USD
 Decreases **26.0%** compared to Feb-2023
 Increase **235.8%** compared to Apr-2022



Chilli

Value: **2.0** Mil. USD
 Increase **1.4%** compared to Feb-2023
 Decreases **62.3%** compared to Apr-2022



Lemon

Value: **1.9** Mil. USD
 Decreases **6.8%** compared to Feb-2023
 Increase **58.7%** compared to Apr-2022



Dragon fruit

Value: **1.6** Mil. USD
 Decreases **17.4%** compared to Feb-2023
 Increase **34.6%** compared to Apr-2022



Coconut

Value: **1.4** Mil. USD
 Decreases **28.7%** compared to Feb-2023
 Decreases **60.7%** compared to Apr-2022



Banana

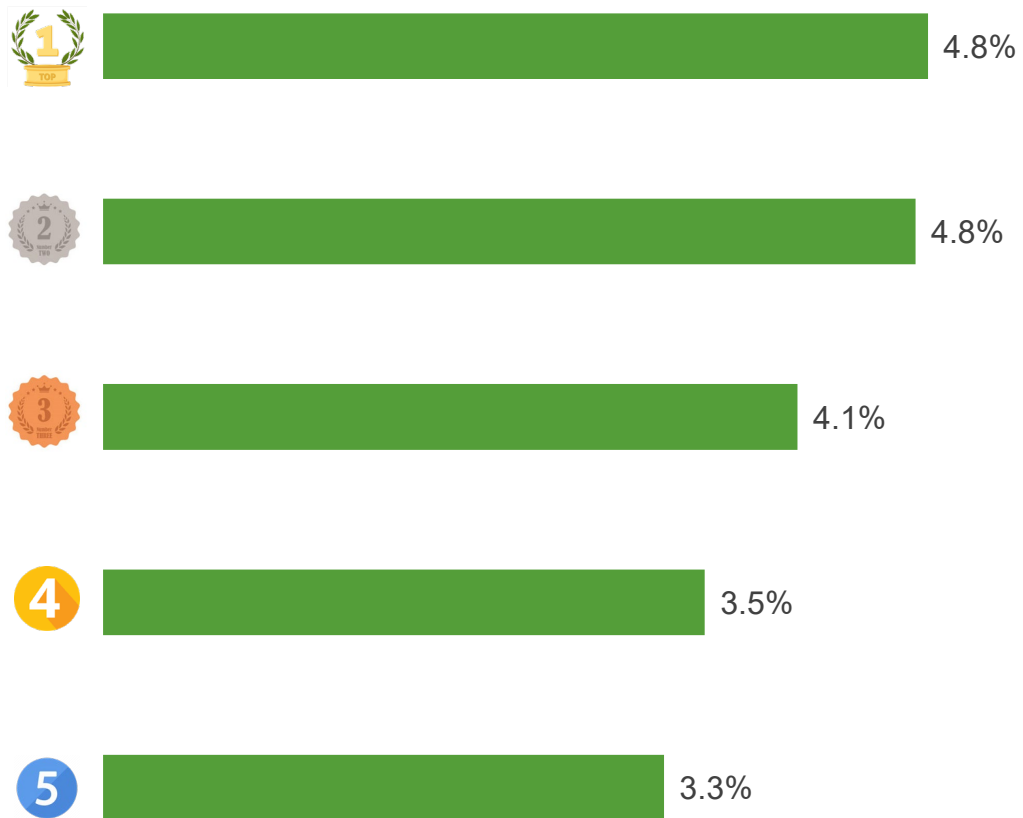
Value: **1.2** Mil. USD
 Increase **11.9%** compared to Feb-2023
 Increase **70.2%** compared to Apr-2022

Source: Calculated from data of the General Department of Customs

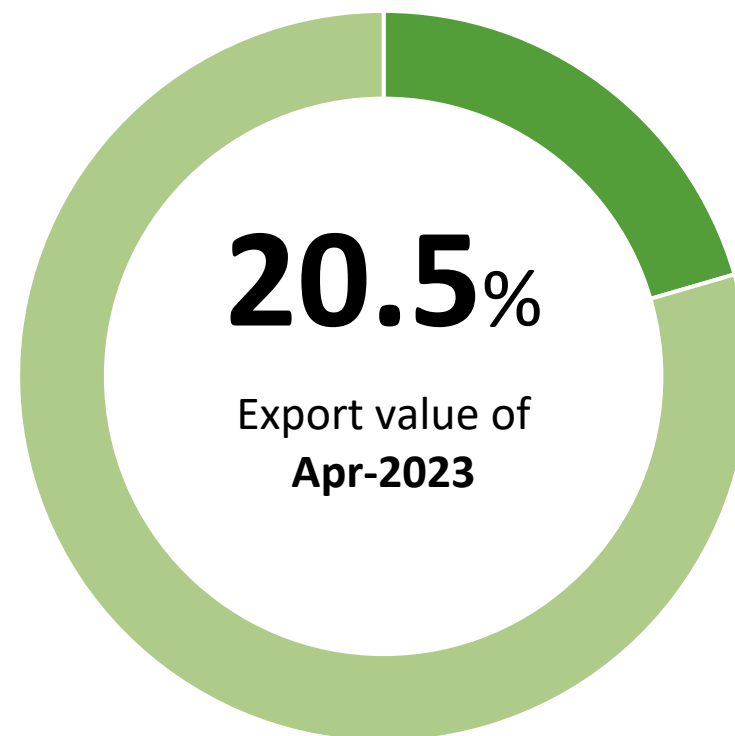


FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value, Apr-2023



Value ratio of TOP 5 export enterprises to, Apr-2023





FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the ASEAN, Apr-2023



Import results from the ASEAN, Apr-2023

Value



19.9

Mil. USD

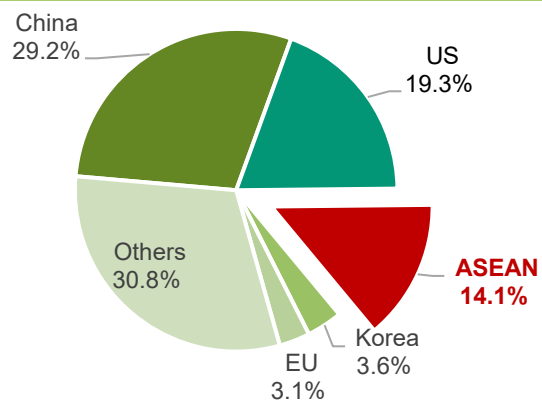
Decreases **10.2%** compared to Feb-2023

Decreases **49.3%** compared to Apr-2023

2.4 Mil. USD less than the monthly average of 2022

Accumulated 4 months of 2023 reaches **82.0 Mil. USD; 30.7%** of total 2022

Percentage of import value from the ASEAN, Apr-2023

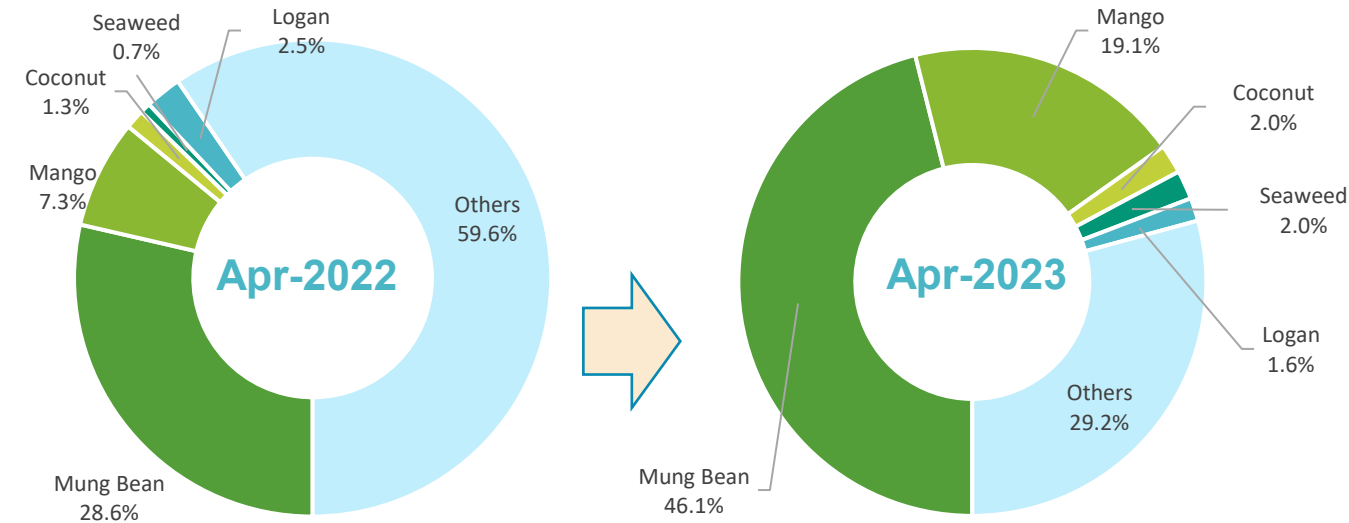


Changes in percentage of import value from the ASEAN, Apr-2023



FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products to the ASEAN, Apr-2023



Import results of some main products to the ASEAN, Apr-2023



Mung bean

Value: **9.2** Mil. USD

Decreases **14.9%** compared to Feb-2023

Decreases **18.3%** compared to Apr-2022



Mango

Value: **3.8** Mil. USD

Decreases **3.5%** compared to Feb-2023

Increase **31.8%** compared to Apr-2022



Coconut

Value: **0.4** Mil. USD

Increase **39.5%** compared to Feb-2023

Decreases **22.6%** compared to Apr-2022



Seaweed

Value: **0.4** Mil. USD

Decreases **28.7%** compared to Feb-2023

Increase **42.7%** compared to Apr-2022



Logan

Value: **0.3** Mil. USD

Increase **4.4%** compared to Feb-2023

Decreases **67.3%** compared to Apr-2022

FRUITS AND VEGETABLES

SPOTLIGHTS



01

The Thai Ministry of Agriculture has set a target to export over 700,000 tons of fresh durian to China this year, with estimated revenue of around 100 billion baht (approximately 2.95 billion USD).

Source: Freshplaza.com

02

Indonesia and Egypt signed a trade cooperation agreement for 120 tons of ginger worth 156,000 USD on April 30, 2023.

Source: Antaranews.com

03

The Philippines is considering importing 22,000 tons of onions to stabilize domestic prices. The quantity of imports is calculated based on the current inventory of 117,000 tons and the country's monthly consumption of approximately 22,000 tons.

Source: Manilatimes.net



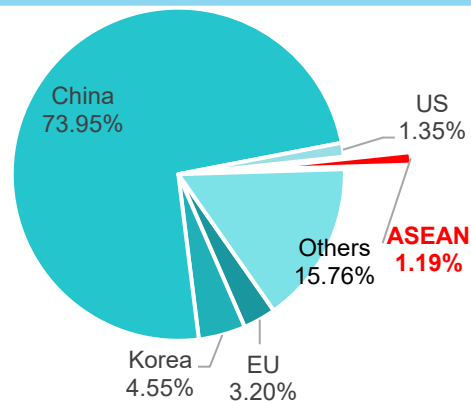


RUBBER

Export volume and value to the ASEAN, Apr-2023



Percentage of export value to the ASEAN, Apr-2023



Source: Calculated from data of the General Department of Customs

Export results to the ASEAN, Apr-2023

VALUE

1.41 Mil. USD

Decreases **53.4%** compared to Feb-2023

Decreases **45.5%** compared to Apr-2022

↓ **2.79** Mil. USD less than the monthly average of 2022

Accumulated 4 months of 2023 reaches **9.97** Mil.USD, **19.8%** of total 2022

VOLUME

0.85 Thousand tons

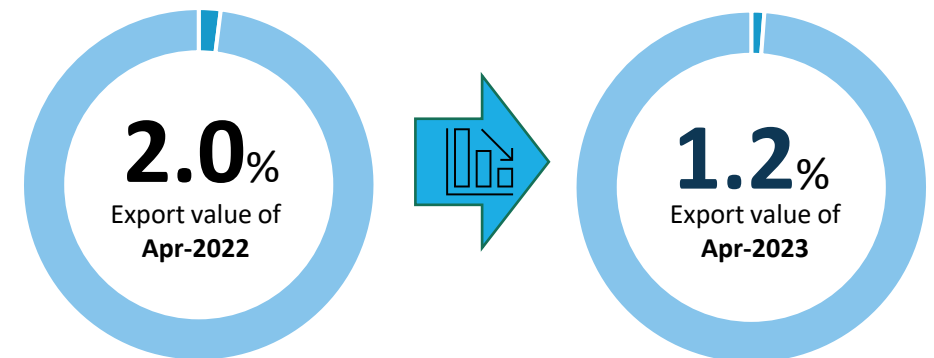
Decreases **55.2%** compared to Feb-2023

Decreases **25.3%** compared to Apr-2022

↓ **9.966** less than the monthly average of 2022

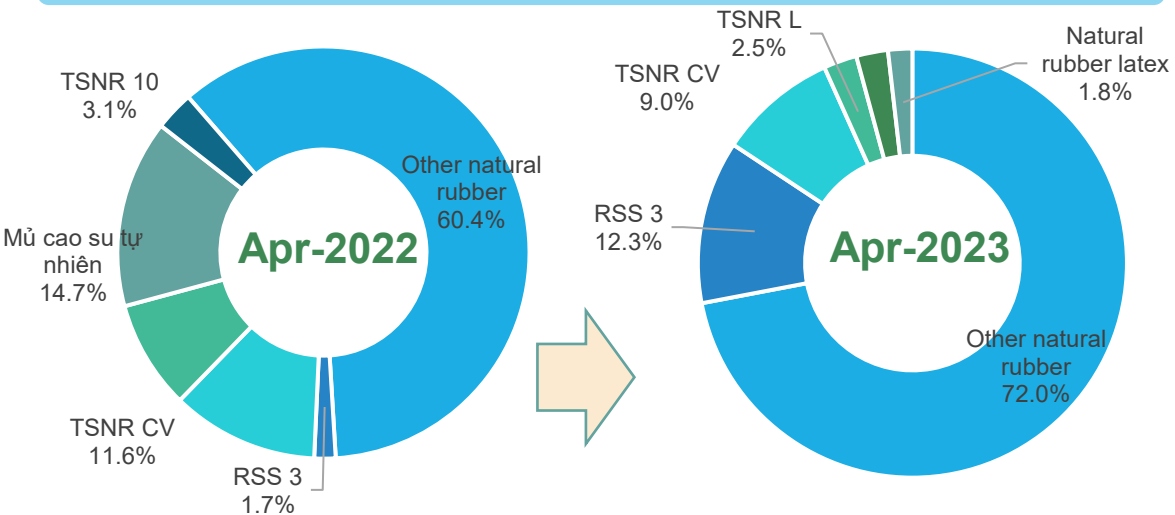
Accumulated 4 months of 2023 reaches **6.2** thousand tons, **21.4%** of total 2022

Changes in percentage of export value to the ASEAN, Apr-2023

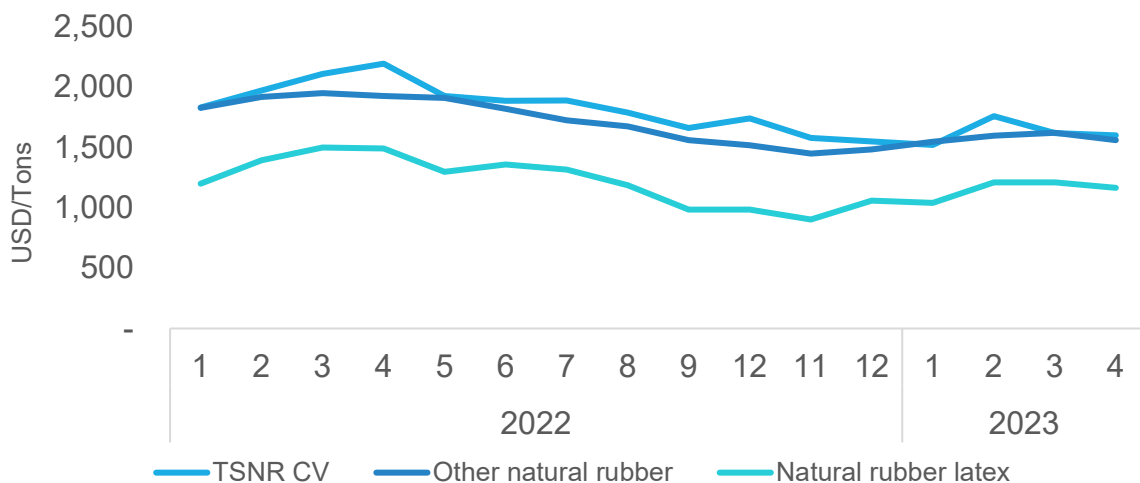


RUBBER

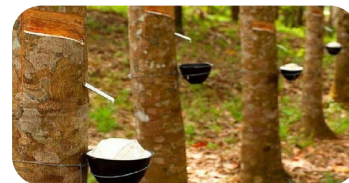
Structure of exports by products to the ASEAN, Apr-2023



Average export price to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

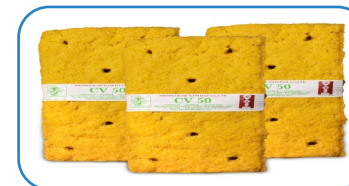


Other natural rubber

Value: **0.81** Mil. USD

Decreases **35.1%** compared to Feb-2023

Decreases **41.4%** compared to Apr-2022

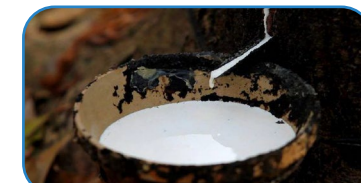


TSNR CV

Value: **0.12** Mil. USD

Decreases **77.5%** compared to Feb-2023

Decreases **56.4%** compared to Apr-2022



Natural rubber latex

Value: **0.02** Mil. USD

Decreases **93.8%** compared to Feb-2023

Decreases **93.1%** compared to Apr-2022

Other natural rubber

The average export in Apr-2023 is **1,561** USD/Tons; decreases **3.8%** compared to the previous month; and decreases **81.1%** compared to the same month of 2022.

TSNR CV

The average export in Apr-2023 is **1,601** USD/Tons; decreases **1.1%** compared to the previous month; but increase **73.0%** compared to the same month of 2022.

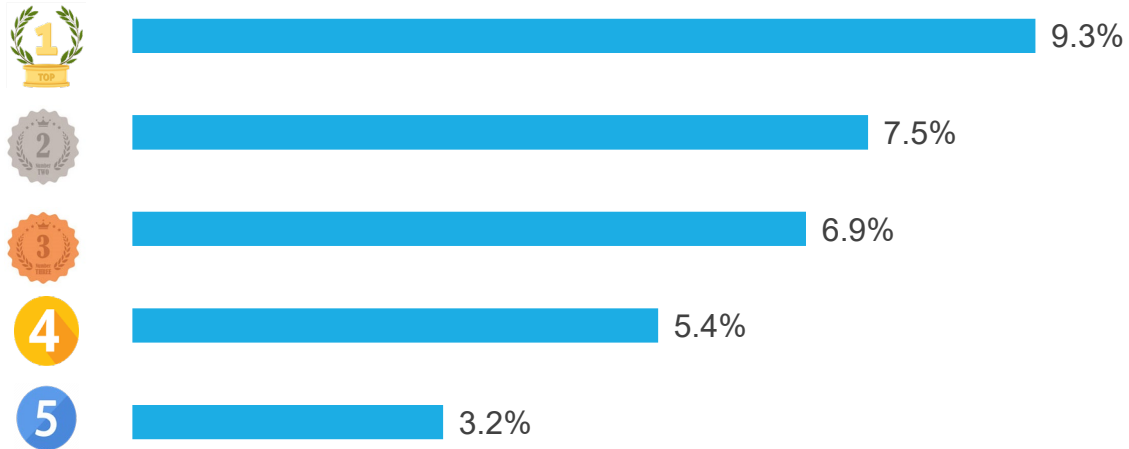
Natural rubber latex

The average export in Apr-2023 is **1,166** USD/Tons; decreases **3.6%** compared to the previous month; but increase **78.2%** compared to the same month of 2022.

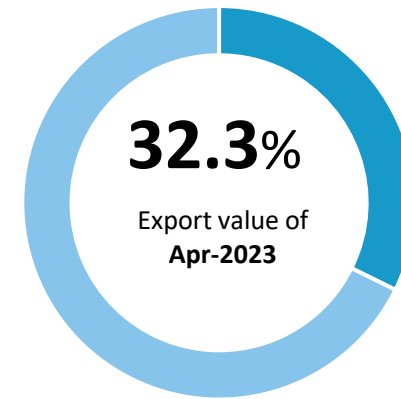


RUBBER

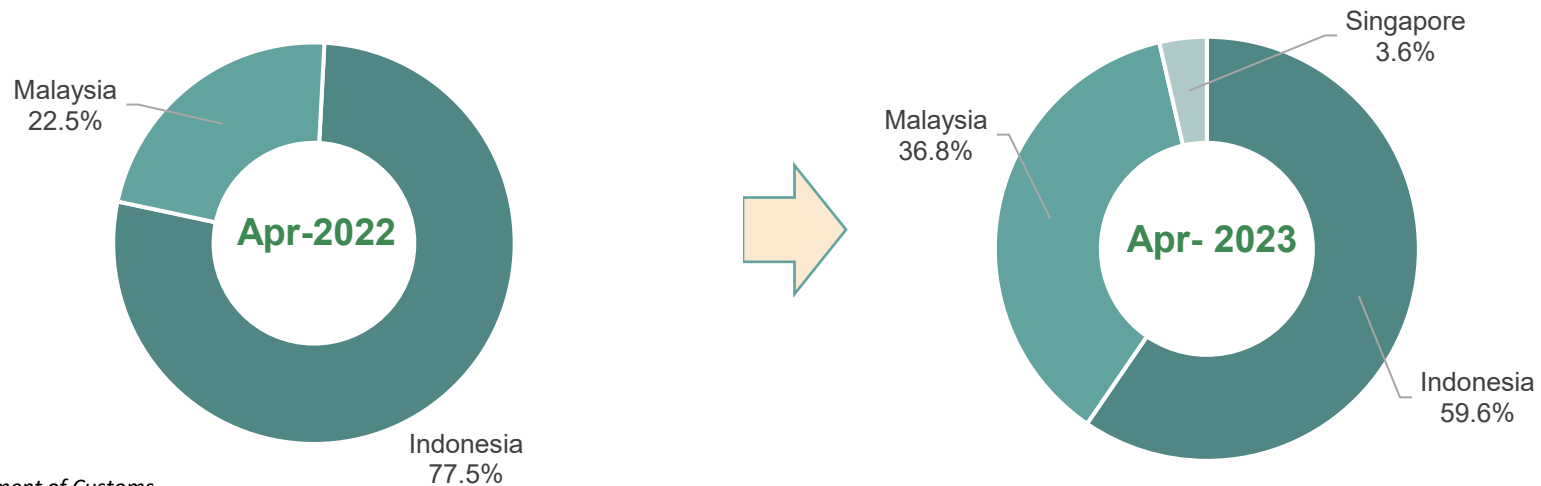
TOP 5 export enterprises by value to the ASEAN, Apr-2023



Value ratio of TOP 5 export enterprises to the ASEAN, Apr-2023



Percentage of import value from some country of the ASEAN, Apr-2023



RUBBER



SPOTLIGHTS

Thailand's natural rubber exports in the first four months of 2023 reached 910,000 tons, a 23% decrease compared to last year. Thailand exported 379,000 tons of natural rubber to China, an increase of 1.3% compared to the same period the previous year.

Source: Tanhei.com

The Malaysian government provides a financial assistance program called Aidilfitri Special Financial Aid (BKKA) with the total support of 13.98 million USD to 318,642 smallholder rubber-producing households through the Smallholder Rubber Industry Development Authority. According to the Minister of Agriculture of Malaysia, each smallholder household will receive a support payment of 43.69 USD.

Source: tapchicaosu.vn

According to the Rubber General Department of Cambodia report, in Q1/2023, the country exported 65.92 thousand metric tons of dry rubber, valued at 90 million USD. This represents a 6.8% increase in volume and a 9.5% increase in value compared to the same period in 2022. The average rubber export price was recorded at 1,351 USD per metric ton, a 15% decrease compared to the same period in 2022. The main export markets for Cambodian rubber are Malaysia, Vietnam, Singapore, and China.

Source: Thuongtruong.com.vn

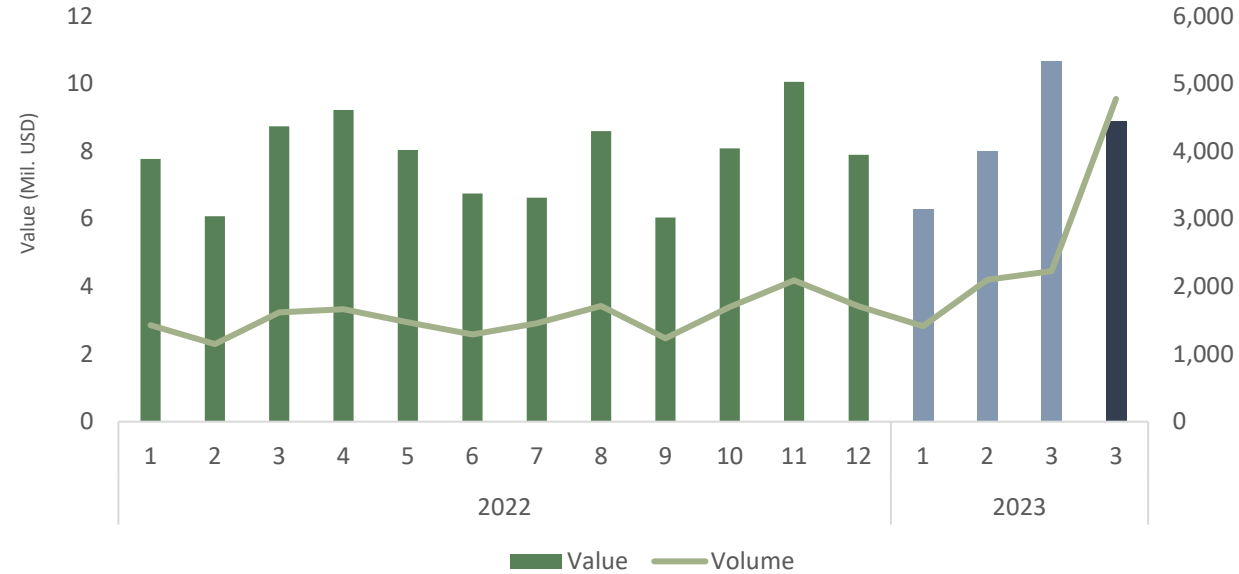
The Ministry of Agriculture and Cooperatives of Thailand forecasts that the country's rubber production will reach 4.951 million tons, an increase of 2.59% in 2023. The projected growth in production is attributed to Thai farmers expanding the cultivation area since 2017, along with the expectation of abundant rainfall, good quality rubber trees, and an extended tapping period.

Source: Yourubber.com



CASHEW NUTS

Export volume and value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

VALUE

8.9 Mil. USD

Decreases **17%** compared to Feb-2023

Decreases **4%** compared to Apr-2022

Increases **1.1 Mil. USD** more than the monthly average rate in 2022

Accumulated 4 months of 2023 reaches **33.9** Mil.USD; **36%** of total 2022

VOLUME

4.7 Thousand tons

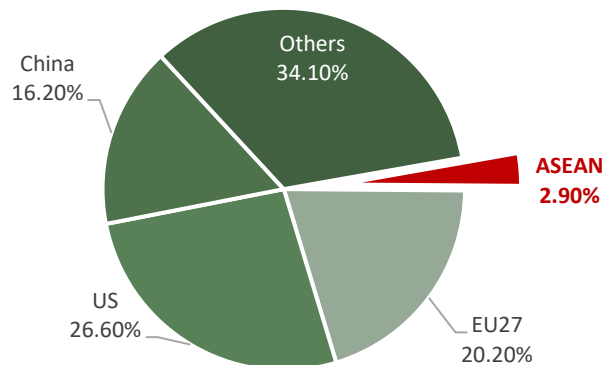
Increases **114%** compared to Feb-2023

Increases **187%** compared to Apr-2022

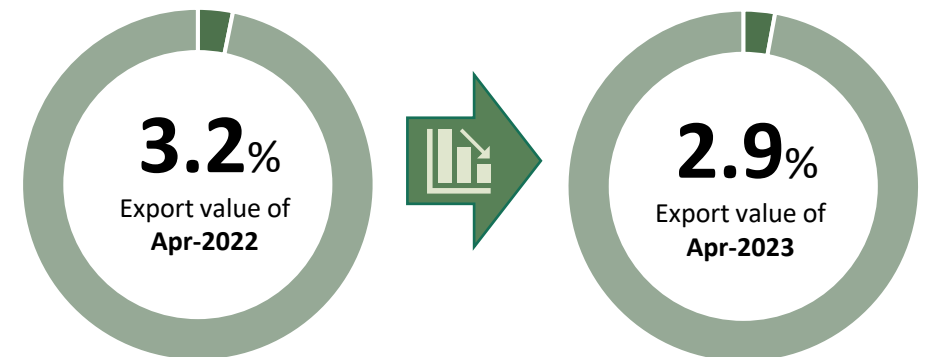
Increases **3.2 thousand USD** more than the monthly average rate in 2022

Accumulated 4 months of 2023 reaches **10.5** thousand tons; **57%** of total 2022

Percentage of export value to the ASEAN, Apr-2023



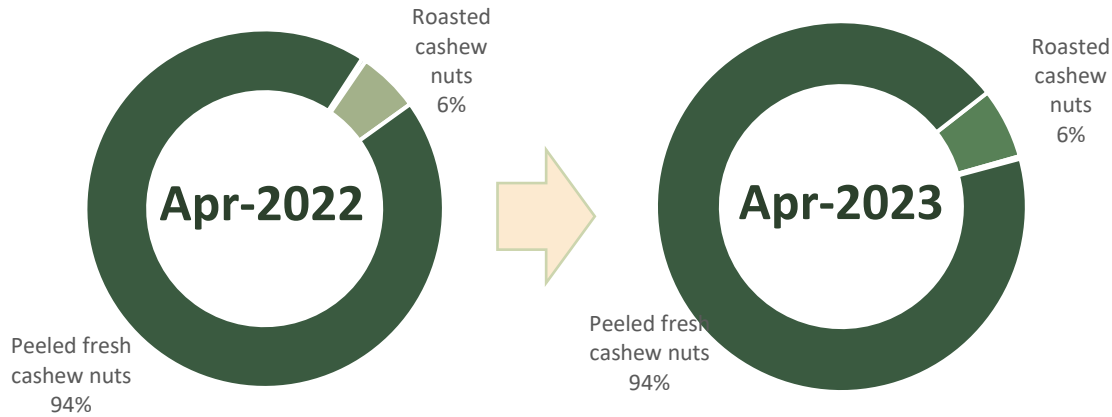
Changes in percentage of export value to the ASEAN, Apr-2023





CASHEW NUTS

Structure of exports by products to the ASEAN, Apr-2023



Average export price to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023



Peeled fresh cashew nuts

Value: **8.3** Mil. USD

Decreases **17.9%** compared to Feb-2023

Decreases **3.94%** compared to Apr-2022



Roasted cashew nuts

Value: **0.54** Mil. USD

Increase **6.5%** compared to Feb-2023

Increase **7.7%** compared to Apr-2022

Peeled fresh cashew nuts

The average export in Apr-2023 is **5,353** USD/Tons; decreases **1.4%** compared to the previous month; and decreases **1.1%** compared to the same month of 2022.

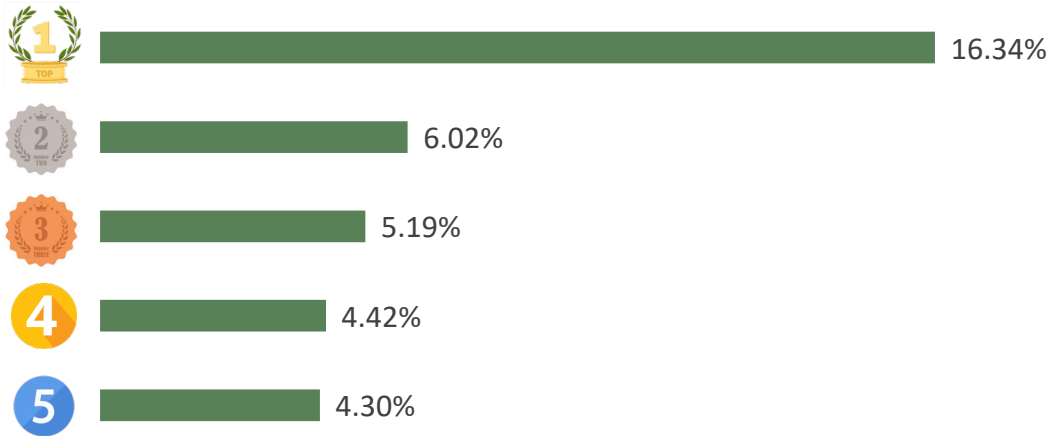
Roasted cashew nuts

The average export in Apr-2023 is **7,829** USD/Tons; decreases **4.9%** compared to the previous month; but increases **1.1%** compared to the same month of 2022.

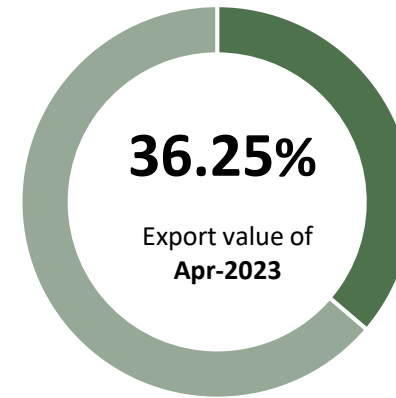


CASHEW NUTS

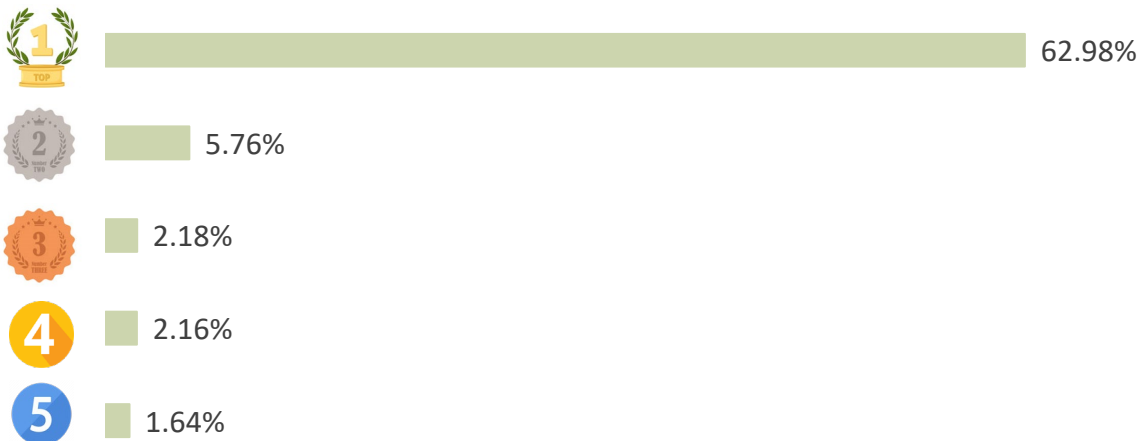
TOP 5 export enterprises by value , Apr-2023



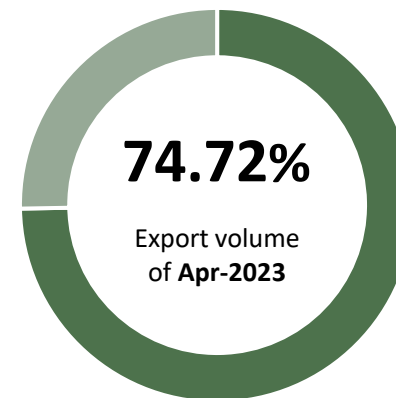
Value ratio of TOP 5 export enterprises to , Apr-2023



TOP 5 export enterprises by volume , Apr-2023



Volume ratio of TOP 5 export enterprises , Apr-2023



CASHEW NUTS



SPOTLIGHTS

From the beginning of the year until now, Cambodia has been the largest market for supplying cashew nuts to Vietnam. Vietnam has spent nearly 676 million USD to import cashew nuts from Cambodia, accounting for almost 63.8% of the total import value of this commodity in the first four months of this year.

According to Vinacas (Vietnam Cashew Association), the strategic direction of cashew-producing countries in Africa and Cambodia is to develop the domestic processing industry and gradually reduce raw exports. Therefore, they have implemented various preferential policies to attract investment in cashew processing factories. They regulate and closely monitor minimum export prices and impose high export tax rates for raw cashew nut exports. Conversely, they provide tax exemptions for processed cashew nuts for export.

Source: Vietnamnet.vn (05/2023)





PEPPER

Export volume and value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

4.6 VALUE
Mil. USD

↘ Decreases **26.7%** compared to Feb-2023

↘ Decreases **7.6%** compared to Apr-2022

↘ **375 thousand USD** less than the monthly average of 2022

Accumulated 4 months of 2023 reaches **20** Mil.USD đạt **33.2%** of total 2022

1.3 VOLUME
thousand tons

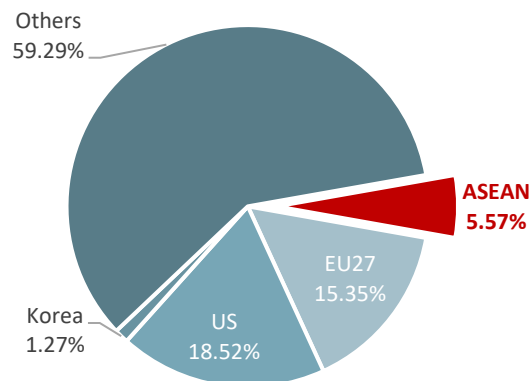
↘ Decreases **27.2%** compared to Feb-2023

↗ Increase **16%** compared to Apr-2022

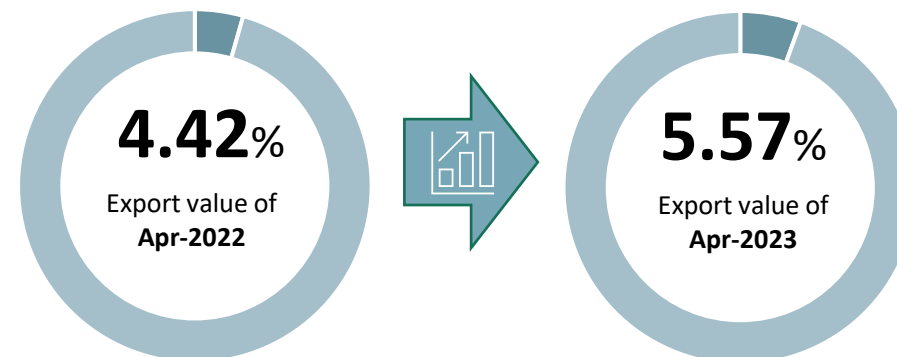
↗ **68 ton** more than the monthly average rate in 2022

Accumulated 4 months of 2023 reaches **5.7** thousand tons; **38.6%** of total 2022

Percentage of export value to the ASEAN, Apr-2023



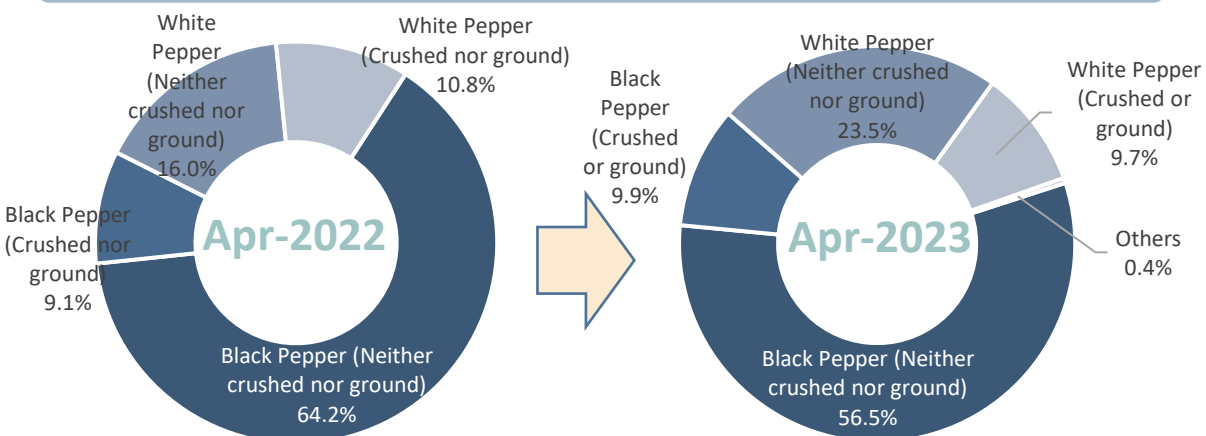
Changes in percentage of export value to the ASEAN, Apr-2023



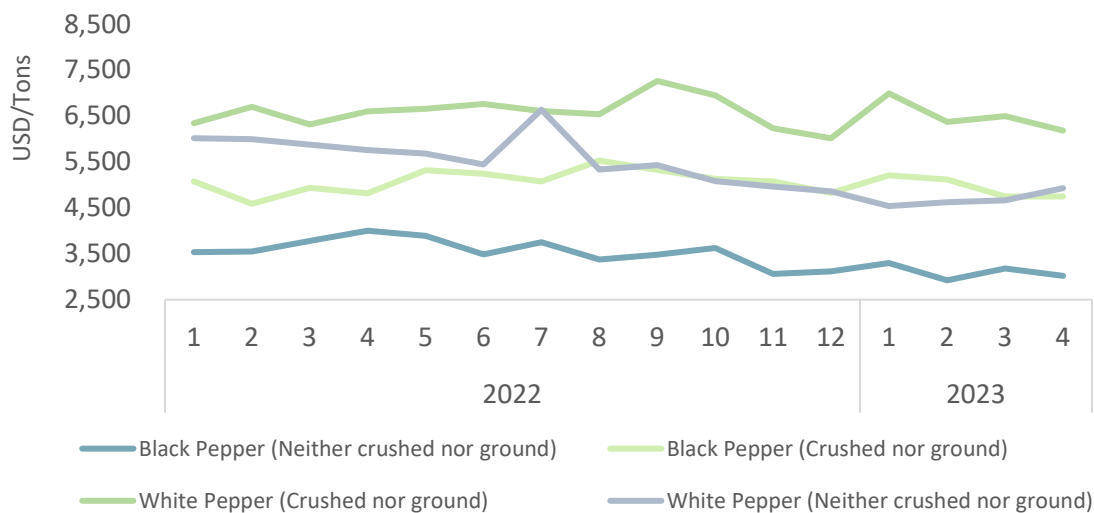


PEPPER

Structure of exports by products to the ASEAN, Apr-2023



Average export price to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023



Black Pepper (Neither crushed nor ground)

Value: **2.6** Mil. USD

Decreases **40.5%** compared to Feb-2023

Decreases **18.6%** compared to Apr-2022



White Pepper (Neither crushed nor ground)

Value: **1.1** Mil. USD

Decreases **20.4%** compared to Feb-2023

Increase **35.5%** compared to Apr-2022

Black Pepper (Neither crushed nor ground)

The average export in Apr-2023 is **3,019** USD/Tons; decreases **5.1%** compared to the previous month; and decreases **22.5%** compared to the same month of 2022.

White Pepper (Neither crushed nor ground)

The average export in Apr-2023 is **4,928** USD/Tons; increase **5.7%** compared to the previous month; but decreases **14.4%** compared to the same month of 2022.

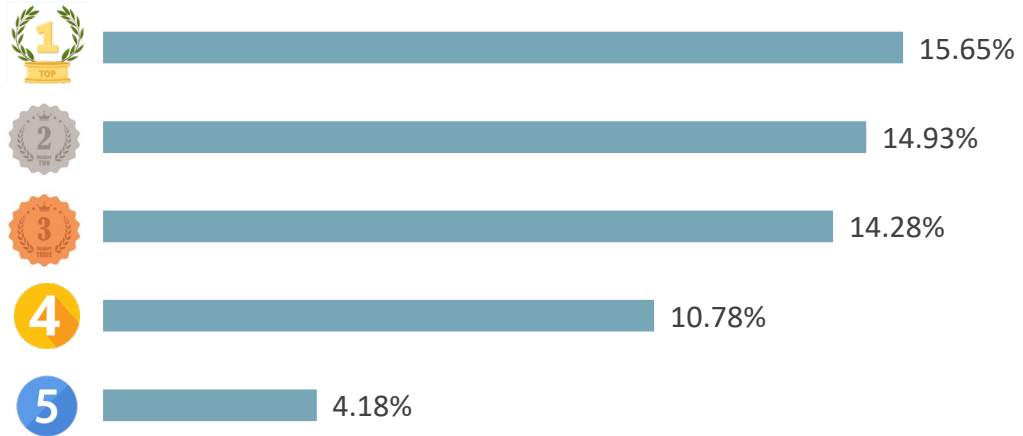
White Pepper (Crushed or ground)

The average export in Apr-2023 is **6,189** USD/Tons; decreases **4.8%** compared to the previous month; and decreases **6.3%** compared to the same month of 2022.

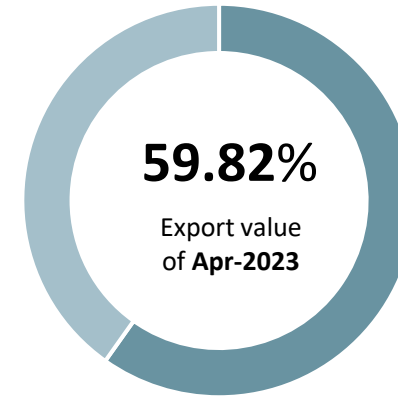


PEPPER

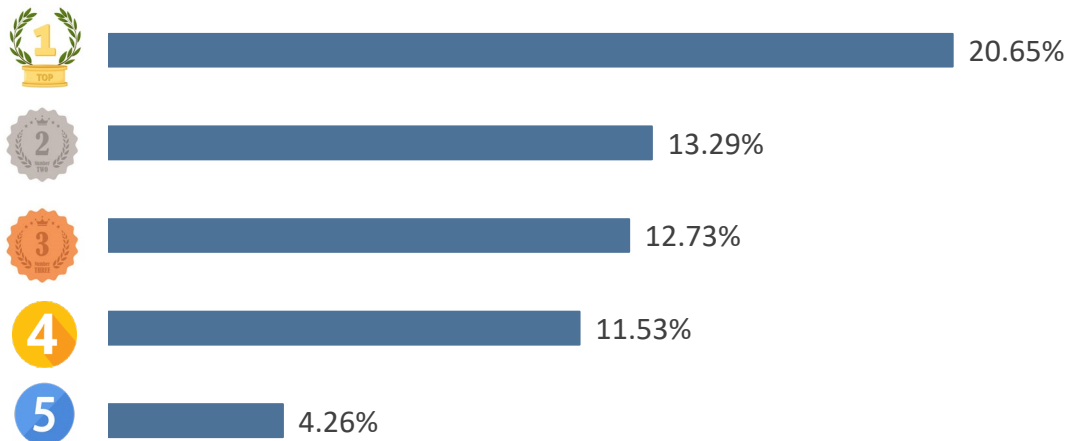
TOP 5 export enterprises by value, Apr-2023



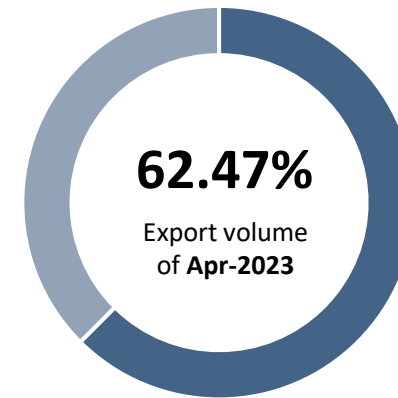
Value ratio of TOP 5 export enterprises to, Apr-2023



TOP 5 export enterprises by volume, Feb-2023



Volume ratio of TOP 5 export enterprises, Apr-2023



PEPPER

SPOTLIGHTS

01

On April 11, the Ministry of Commerce of Cambodia (MoC) met to discuss solutions to promote pepper exports. The Cambodian government has made this item one of the top priorities, especially for pepper, in the context that the country is negotiating free trade agreements with trading partners other trade in the world

Source: Vietnambiz.vn (05/2023)

02

In November 2022, Cambodia and China signed a memorandum of understanding (MoU) regarding phytosanitary requirements for exported pepper. This MoU serves as a foundation for further negotiations between the relevant ministries and agencies of both countries regarding phytosanitary requirements. It paves the way for the official and direct export of Cambodian pepper to China in the near future.

Source: Vietnamagriculture.nongnghiep.vn (05/2023)

03

On May 11th, the General Administration of Customs of China (GAC) released a list of registered Cambodian enterprises for exporting pepper to China. This marks the completion of all required procedures and enables the direct export of Cambodian pepper to China. According to the announcement, 28 pepper cultivation establishments and seven packaging factories have been granted permission to export pepper to China.

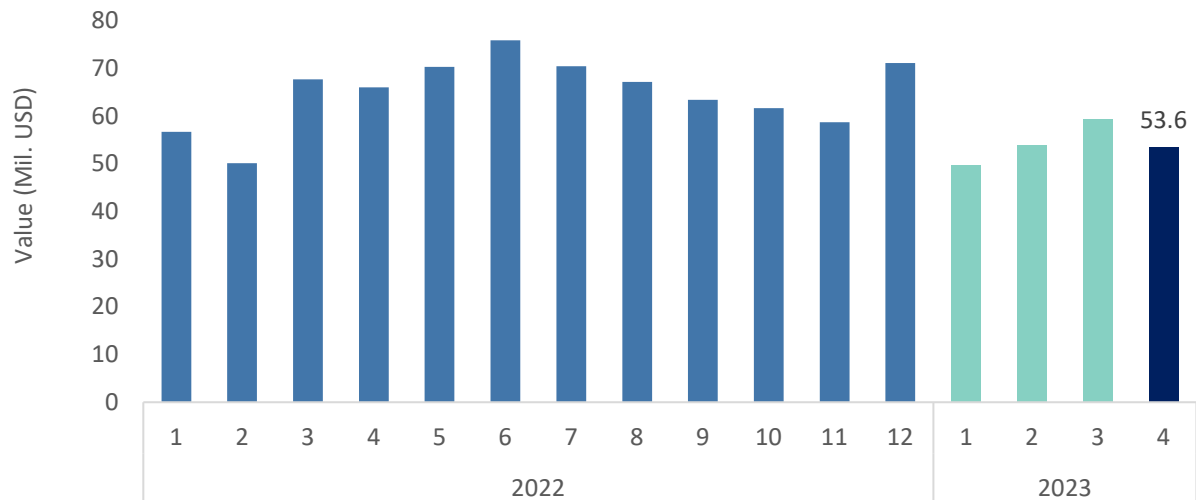
Source: Phnompenhpost.com (05/2023)





SEAFOOD

Export volume and value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

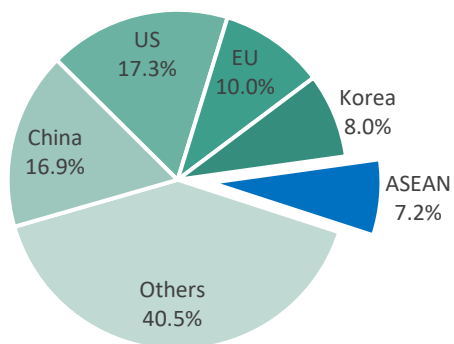
VALUE



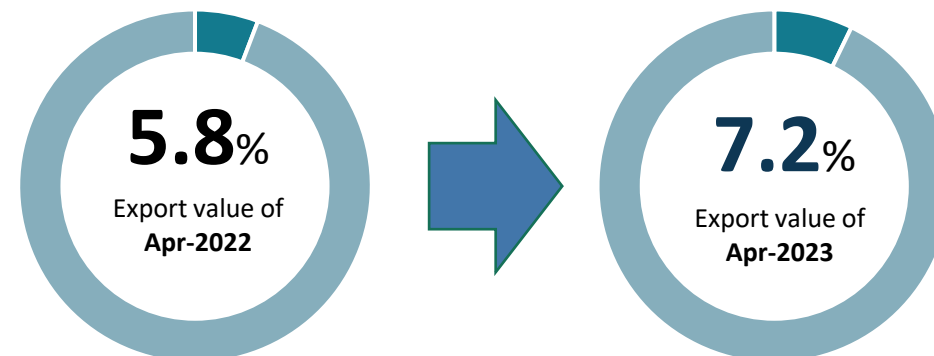
53.6 Mil. USD

- Decreases **9.8%** compared to Feb-2023
- Decreases **18.9%** compared to Apr-2022
- 11.4** Mil. USD less than the monthly average of 2022
- Accumulated 4 months of 2023 reaches **216.7** mil.USD; **27.8%** of total 2022

Percentage of export value to the ASEAN, Apr-2023



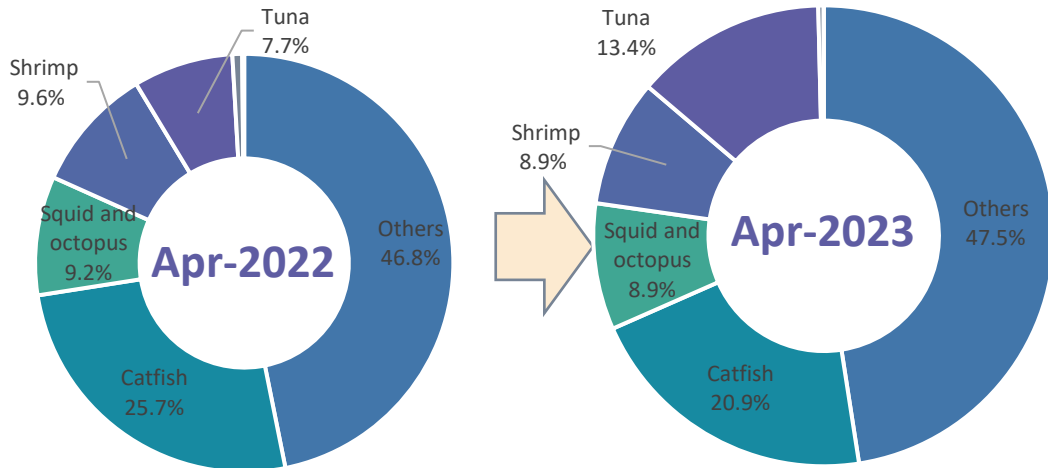
Changes in percentage of export value to the ASEAN, Apr-2023



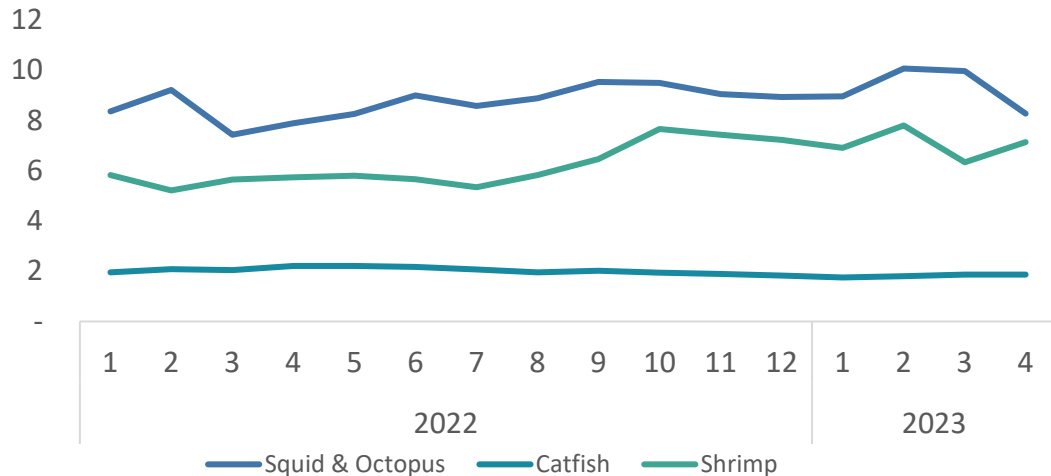
SEAFOOD



Structure of exports by products to the ASEAN, Apr-2023



Structure of exports by products to the ASEAN, Apr-2023



Structure of exports by products to the ASEAN, Apr-2023



Catfish

Value: **11.1** Mil. USD

Decreases **10.7%** compared to Feb-2023

Decreases **34.3%** compared to Apr-2022



Squid & Octopus

Value: **4.7** Mil. USD

Decreases **8.7%** compared to Feb-2023

Decreases **21.9%** compared to Apr-2022



Shrimp

Value: **4.7** Mil. USD

Decreases **0.5%** compared to Feb-2023

Decreases **25.1%** compared to Apr-2022

Squid & Octopus

The average export in Apr-2023 is **8.3** USD/kg; decreases **17.1%** compared to the previous month; but increase **4.8%** compared to the same month of 2022.

Catfish

The average export in Apr-2023 is **1.9** USD/kg; decreases **0.1%** compared to the previous month; and decreases **15.6%** compared to the same month of 2022.

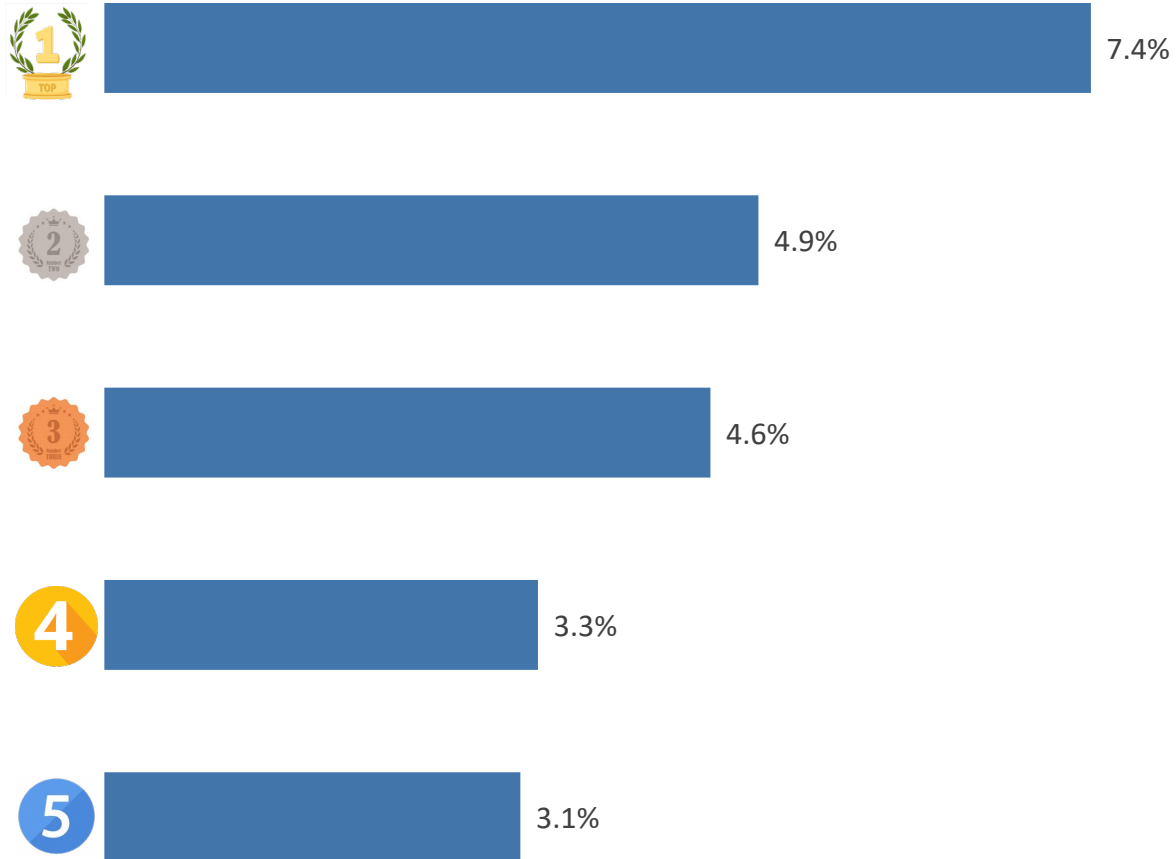
Shrimp

The average export in Apr-2023 is **7.1** USD/kg; increase **12.5%** compared to the previous month; and increase **24.2%** compared to the same month of 2022.

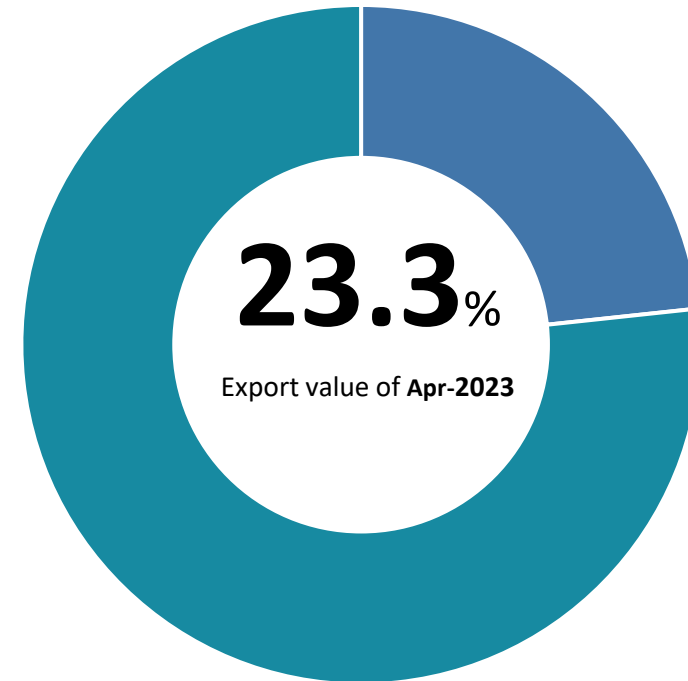


SEAFOOD

TOP 5 export enterprises by value to the ASEAN, Apr-2023



Value ratio of TOP 5 export enterprises to the ASEAN, Apr-2023



01

Indonesia is negotiating to increase the fishing quota of bluefin tuna

The Indonesian Ministry of Fisheries and Maritime Affairs is pursuing negotiations to secure additional catch quotas for bluefin tuna to curb illegal fishing. From 2018 to 2020, Indonesia had an annual allowed catch quota of 1,023 tons for bluefin tuna. After intense negotiations, the percentage was subsequently increased to 1,123 tons from 2021 to 2023.

Source:Antaraneews (5/2023)

02

Thai government opens fishing vessel restriction center

Thailand's Southern Border Provinces Administrative Center (SBPAC) will establish a compensation distribution center for fishing boat owners who wish to exit the industry. This is part of the Sustainable Management of Marine Fisheries Resources project, which aims to reduce the number of fishing boats in the southern deep-sea areas of Thailand. The center for fishing boat owners has been operational since May 8, 2023.

Source: Vasep(5/2023)





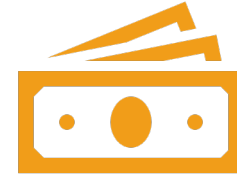
MEAT & MEAT PRODUCTS (EXPORT)

Export value to the ASEAN, Apr-2023



Export results to the ASEAN, Apr-2023

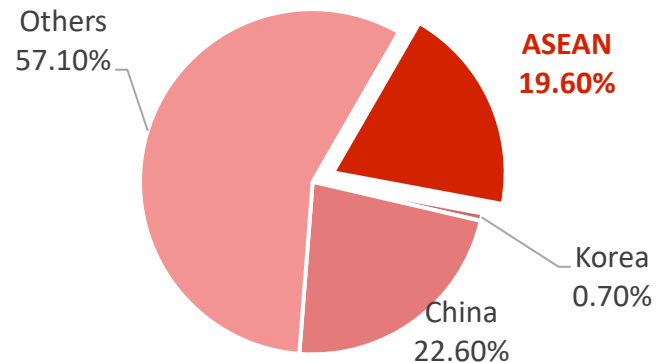
VALUE



2.87
Mil. USD

- ↗ Increase **12.5%** compared to Feb-2023
- ↗ Increase **3 times** compared to Apr-2022
- ↑ **962 thousand USD** more than the monthly average rate in 2022
- ◇ Accumulated 4 months of 2023 reaches **5.96 Mil. USD; 38.6%** of the total 2022

Percentage of export value to the ASEAN, Apr-2023



Changes in percentage of export value to the ASEAN





MEAT & MEAT PRODUCTS (EXPORT)

Import value from the ASEAN, Apr-2023



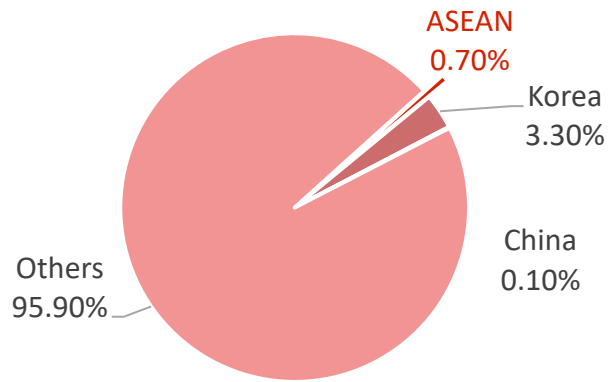
Import results from the ASEAN, Apr-2023

VALUE

- Decreases **44.5%** compared to Feb-2023
- Decreases **88.8%** compared to Apr-2022
- ↓ **10.9 Mil. USD** less than the monthly average of 2022
- ◇ Accumulated 4 months of 2023 reaches **4.4 Mil. USD**; **3.1%** of total 2022

950.7
Thousand USD

Percentage of import value from the ASEAN, Apr-2023



Changes in percentage of import value form the ASEAN

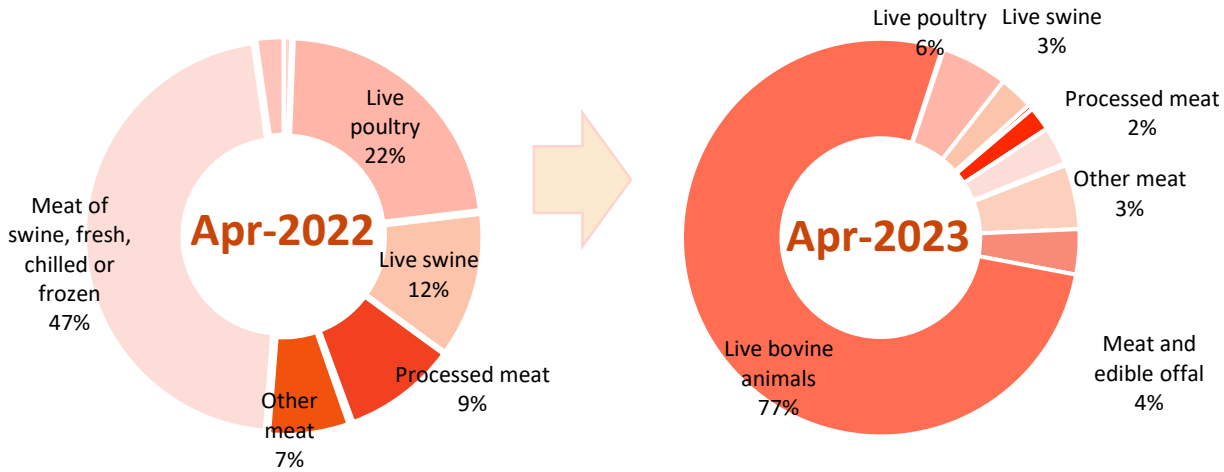


Source: Calculated from data of the General Department of Customs



MEAT & MEAT PRODUCTS

Structure of export value by products to the ASEAN, Apr-2023



Import results to the ASEAN, Apr-2023



Live bovine animals

Value: **2.2** Mil. USD
Increase **57.3%** compared to Feb-2023



Live poultry

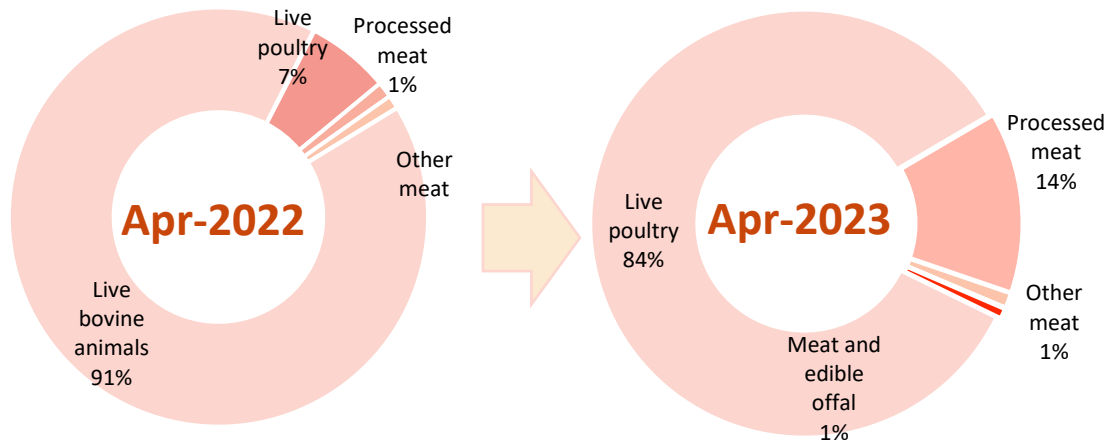
Value: **156** thousand USD
Decreases **16.7%** compared to Feb-2023



Meat of bovine animals, frozen

Value: **151** thousand USD
Increase **15** times compared to Feb-2023

Structure of import value by products the ASEAN, Apr-2023



Exmport results the ASEAN, Apr-2023



Live poultry

Value: **802** thousand USD
Decreases **44.6%** compared to Feb-2023
Increase **47.53%** compared to Apr-2022



Processed meat

Value: **130** thousand USD
Decreases **36.5%** compared to Feb-2023
Increase **25.6%** compared to Apr-2022

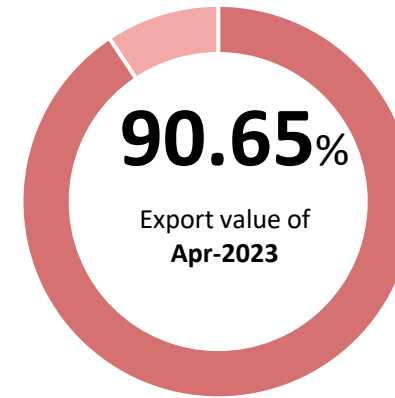


MEAT & MEAT PRODUCTS

TOP 5 export enterprises by value, Apr-2023



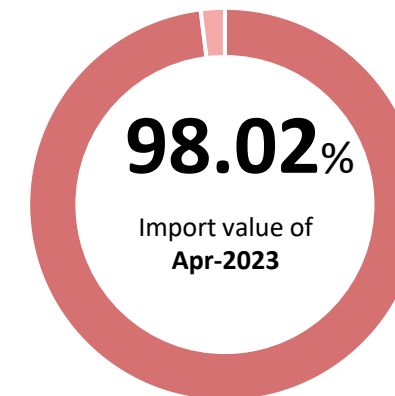
Value ratio of TOP 5 export enterprises to, Apr-2023



TOP 5 import enterprises by value, Apr-2023



Value ratio of TOP 5 import enterprises to, Apr-2023





01

On May 2, Indonesia confirmed that one of its farms supplied pigs infected with African Swine Fever (ASF) for an export order to Singapore. Specifically, samples taken from the farm in Pulau Bulan, Riau province, which accounted for approximately 15% of Singapore's total pork supply, were tested and confirmed positive for ASF.

Source: Vietnambiz.vn (5/2023)

02

Live chickens from Indonesia have been certified as free from the avian influenza virus, allowing them to be transported directly to Singapore. This marks the first time Indonesia has exported live chickens to Singapore. The opening of the live chicken market in Singapore is expected to create a balance between supply and demand and improve the welfare of Indonesian farmers.

Source: Vietnamplus.vn (5/2023)



COMMENTS AND REVIEW

RICE

The increasing demand for rice imports in traditional markets such as the Philippines and Indonesia creates opportunities for the Vietnamese rice industry to accelerate its exports. Indonesia has decided to increase its rice procurement for stockpiling to 2.4 million tons, double the previous quantity of around 1.2 million tons, to ensure food security.



SEAFOOD

In the second quarter of 2023, the value of seafood exports to the ASEAN market is expected to decrease by approximately 4% compared to the same period in 2022. This decline is primarily due to a continued decrease in consumer demand resulting from inflationary pressures. Additionally, record-high and volatile prices of input materials used in seafood production have led to high production costs, making it challenging for seafood products to compete with those from countries like India and Ecuador.



PEPPER

The Ministry of Industry and Trade forecasts that pepper exports to ASEAN markets will experience optimistic growth in the second quarter of 2023 due to high demand from these markets. The export activities of pepper will be more vibrant as domestic pepper production is currently high, just after the harvest season, and not competing with major producers like Brazil and Indonesia, as these countries harvest in the later months of the year.



COFFEE

The export price of coffee is expected to continue rising in the last month of the second quarter of 2023 due to scarce supply. Additionally, the lower cost compared to Arabica coffee provides a competitive advantage for Robusta coffee, especially in the context of increasing concerns about ongoing economic recession.





Any comments, please send to:

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