

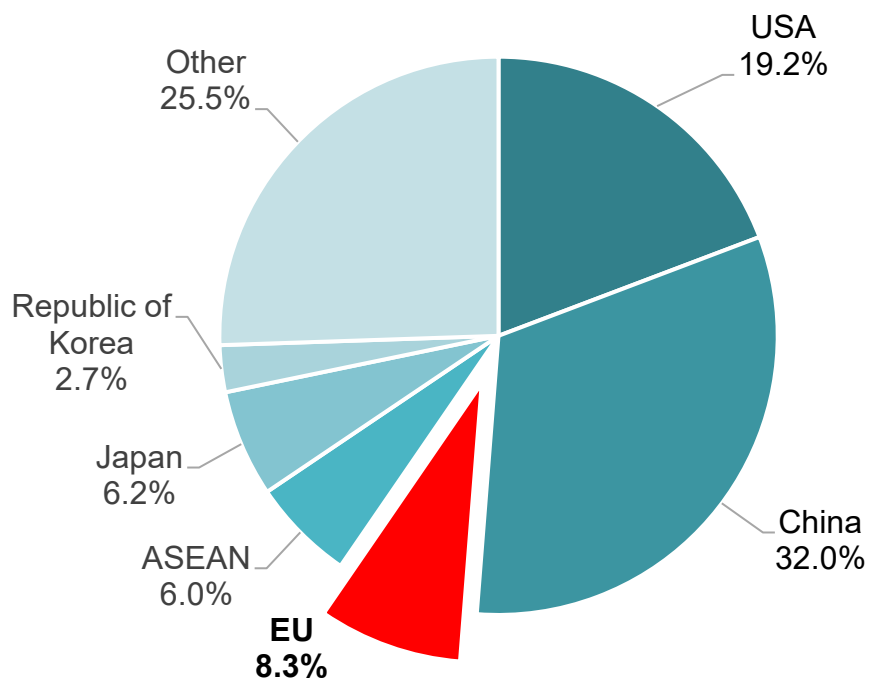


MONTHLY REPORT ON AGRI-PRODUCTS EXPORT

FROM VIETNAM TO **THE EU MARKET**

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

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

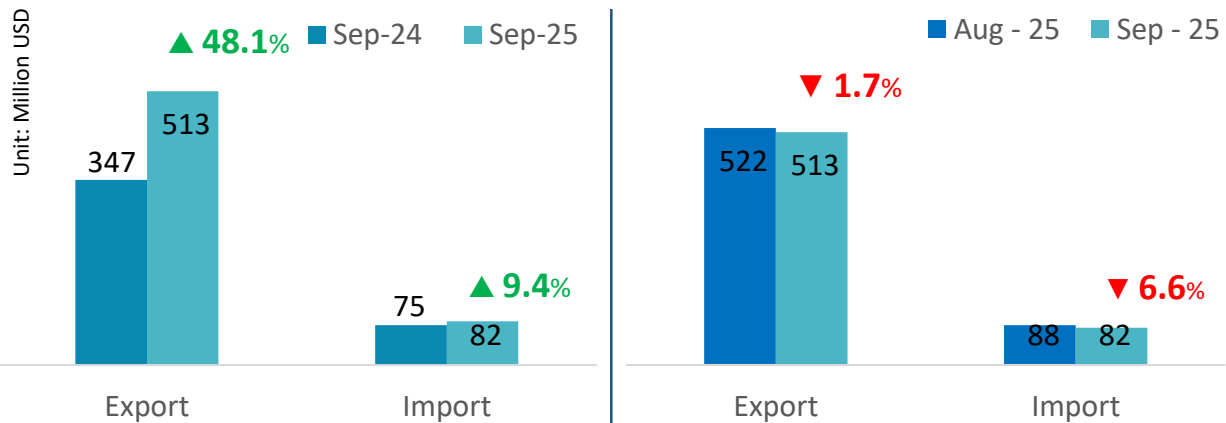


Changes in export proportion of AFF product to the EU Sep-2025 compared to Aug-2025 and Sep-2024

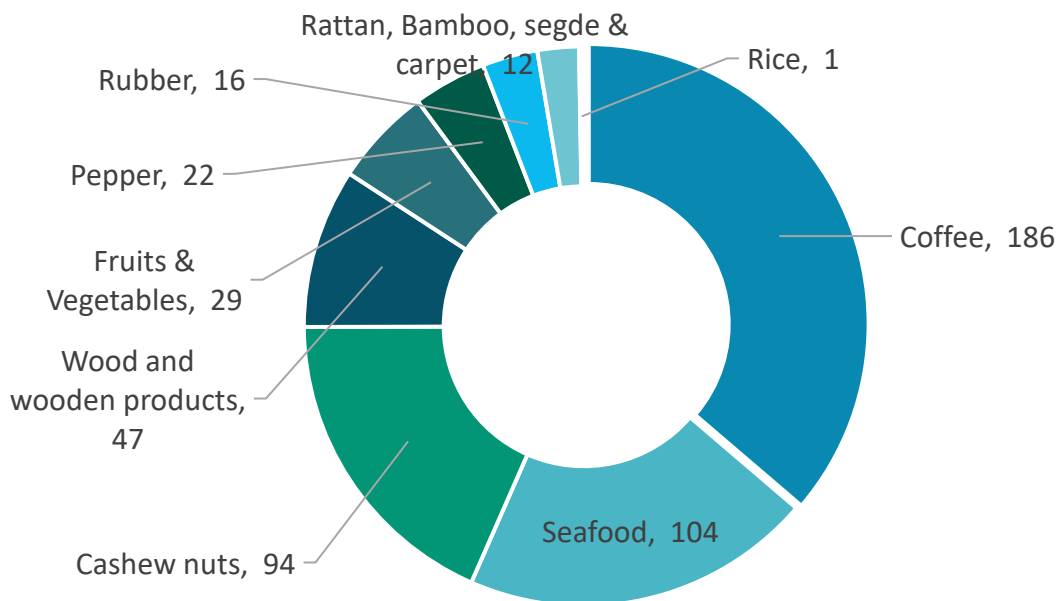
	Export value (mil. USD)	Compared to Aug-2025	Compared to Sep-2024
USA	1,185	▼ 0.01%	▼ 1.9%
China	1,971	▲ 5.9%	▲ 5.1%
EU	513	▼ 0.02%	▲ 1.9%
ASEAN	369	▼ 3.2%	▼ 5.7%
Japan	382	▼ 1.0%	▲ 0.4%
Republic of Korea	167	▼ 0.4%	▼ 0.2%
Total export	6,159		

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

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

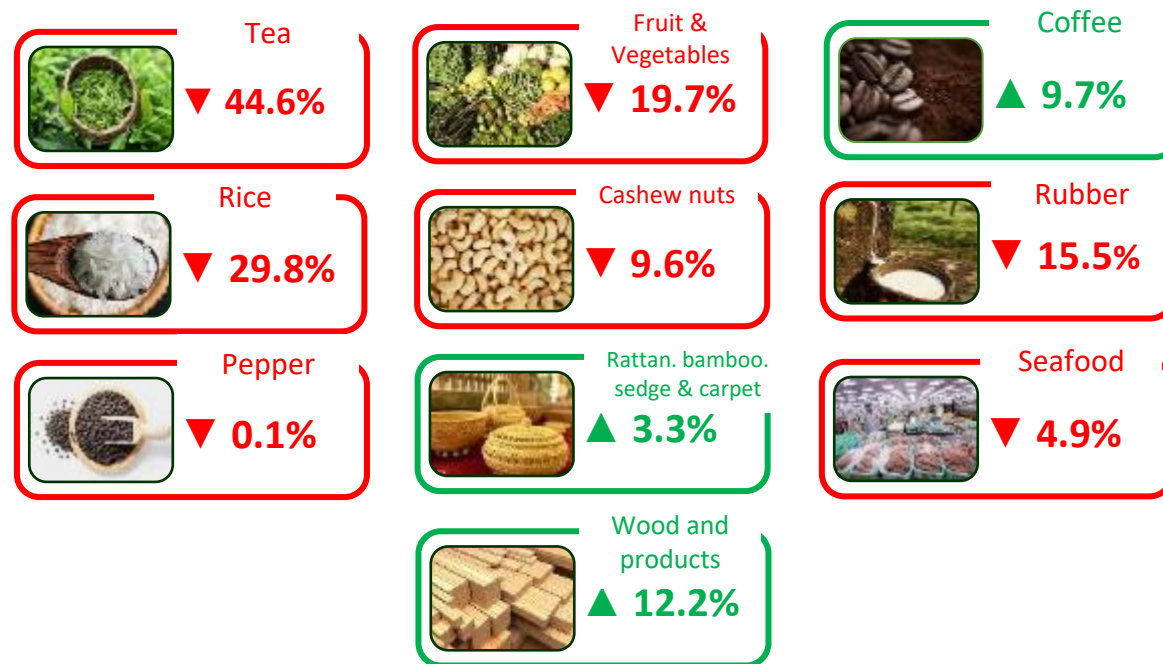


Key AFF product export value to the EU, Sep-2025

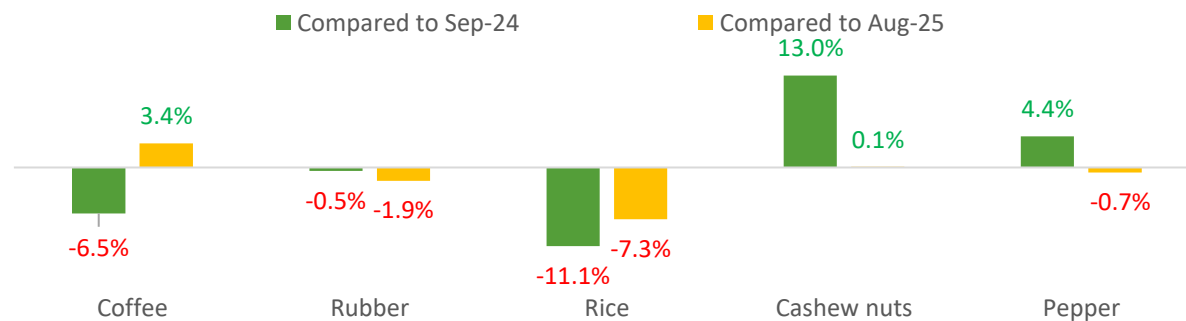


Unit: Million USD

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



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



Vietnamese Agricultural Products are Recognized in the EU

According to the Vietnam SPS Office, in the first nine months of 2025, the number of warnings from the European Union (EU) for Vietnam's exported agricultural and food products decreased by approximately 50% compared to the same period last year. This reflects the significant efforts of businesses and management agencies in improving quality and complying with

the EU's food safety standards. Since the EU-Vietnam Free Trade Agreement (EVFTA) came into effect on August 1, 2020, Vietnam-EU agriculture trade has achieved many positive results; key sectors such as coffee, pepper, seafood, and fruits and vegetables have taken advantages and opportunities of the agreement.

The EU continuously adjusts its regulations on maximum residue levels for pesticides and antibiotics for each plant variety and specific product, requiring businesses to closely monitor and strictly adhere to them. The EU

applies a flexible border control mechanism based on compliance levels, reviewing imports from third countries every six months to adjust inspection frequency. Currently, Vietnam has only four products remaining on the border control list, including durian (20% inspection frequency), okra and bell peppers (50% with an accompanying certificate), and dragon fruit (30%). Compared to many other countries, this short list of controlled products indicates a high level of trust from the EU in Vietnamese agricultural products.

Source: Baochinphu.vn



Eurozone inflation rebounds

In the third quarter of 2025, the European Union (EU) economy continued its recovery momentum, with Gross Domestic Product (GDP) growth rate of 0.3% compared to the previous quarter and 1.5% compared to the same period last year. The Eurozone area grew by 0.2% quarter-on-quarter and 1.3% year-on-year, maintaining a recovery trend, although the growth rate slightly decelerated compared to the second quarter. Major economies such as Germany and Italy experienced stagnant growth, whereas France and Spain recorded quarterly increases of 0.5% and 0.6%, respectively.

Notably, Sweden, Portugal, and the Czech Republic have the highest growth rate in the EU with quarterly increases of 1.1%, 0.8%, and 0.7%, respectively. Some countries, such as Lithuania, Ireland, and Finland, recorded slight decreases. According to Eurostat, these results reflect a gradually stabilizing economic recovery across the region, following a

period of weaker growth in 2024 when EU GDP increased by only 1% and Eurozone GDP by 0.9%.

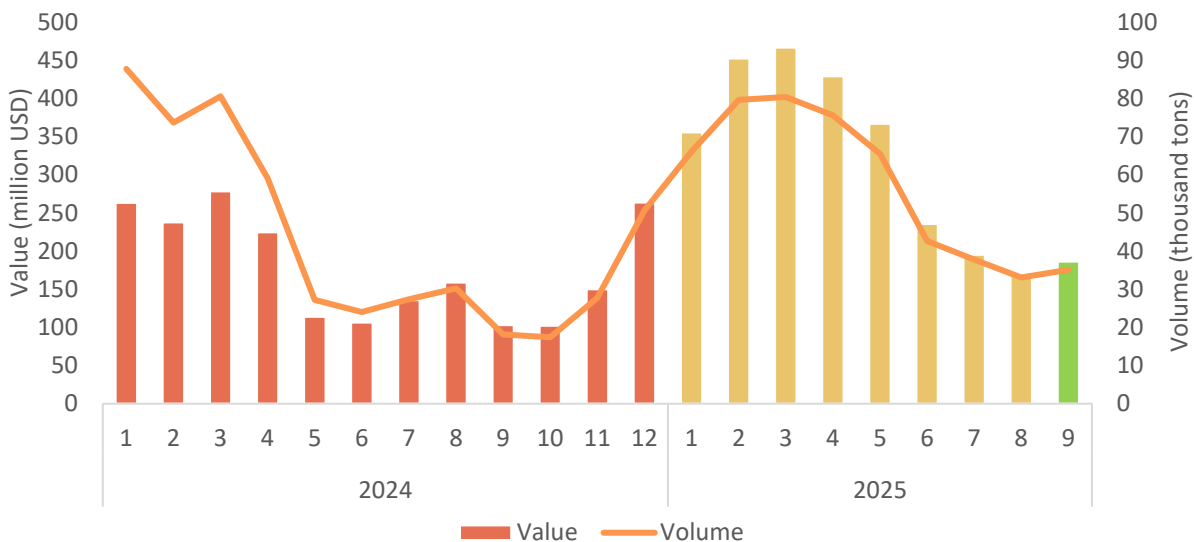
These figures affirm an improved recovery outlook for Europe, although the growth remains modest and varies among member states. Positive signals from several member economies indicate that the region is progressively overcoming a period of decline, moving towards more stable growth in the future.

Source: Gmk.center



COFFEE

Export volume and value to the EU, Sep-2025



Export results to the EU, Sep-2025

VALUE

186.1 mil. USD

↗ Increase **9.7%** compared to Aug-2025

↗ Increase **81%** compared to Sep-2024

↗ **8.1 mil. USD** more than compared to monthly average in 2024.

❖ Accumulated 9 months of 2025 reaches **2.86 bil. USD, 133.7%** of total 2024.

VOLUME

35,1 thousand tons

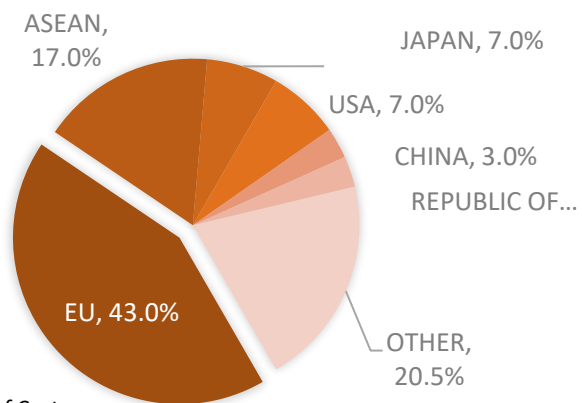
↗ Increase **6,1%** compared to Aug-2025

↗ Increase **93,7%** compared to Sep-2024

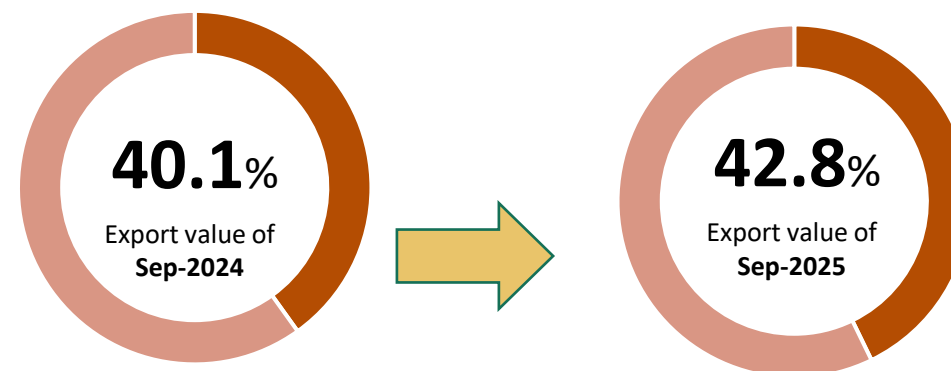
↘ **8,5 thousand tons** less than compared to monthly average in 2024.

❖ Accumulated 9 months of 2025 reaches **515.8 thousand tons, 98.5%** of total 2024.

Percentage of export value to the EU, Sep-2025

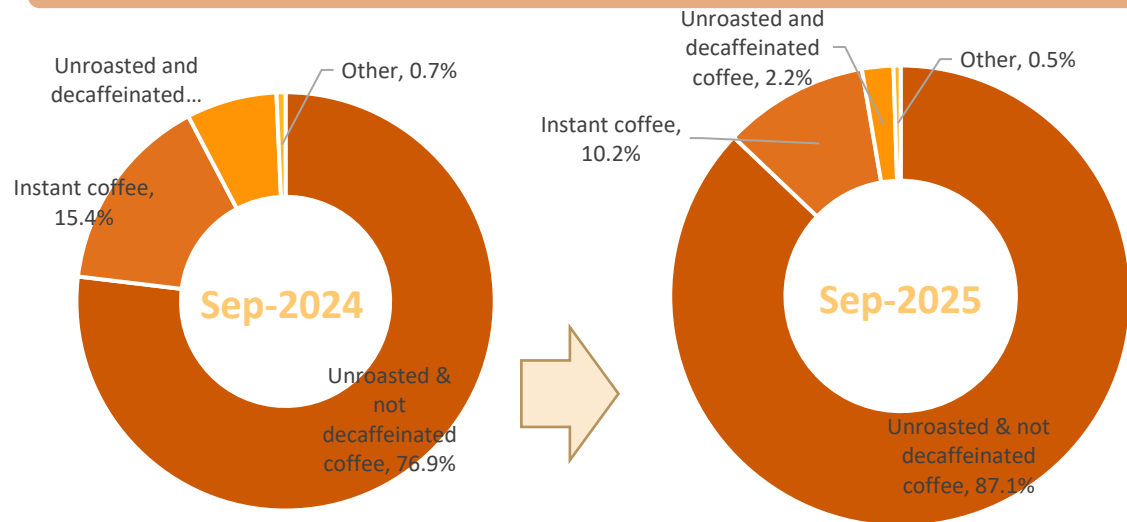


Changes in percentage of export value to the EU, Sep-2025

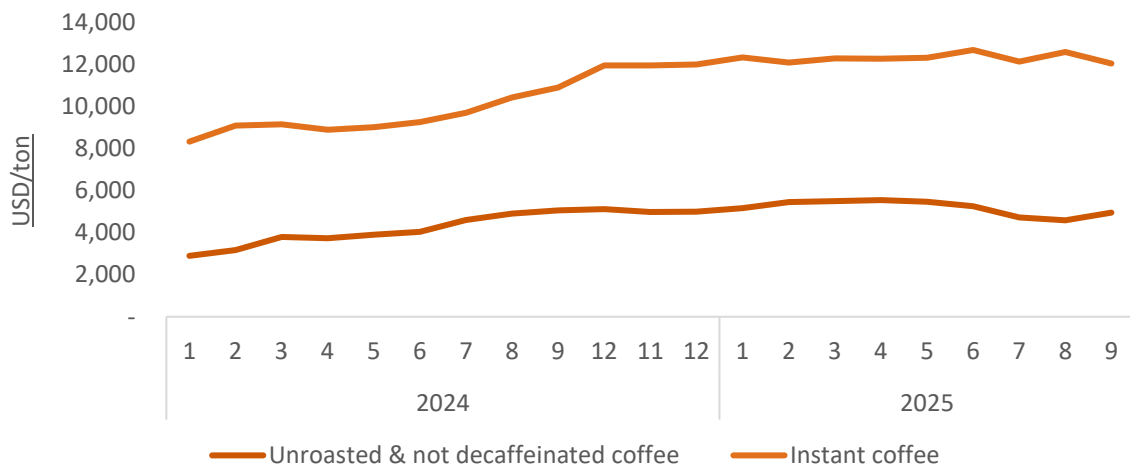


COFFEE

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



Average export price to the EU, Sep-2025



Export results to the EU, Sep-2025



Unroasted & not decaffeinated coffee

Value: **164.3** mil. USD
 Increase **17.2%** compared to Aug-2025
 Increase **107%** compared to Sep-2024

Instant coffee

Value: **19.2** mil. USD
 Decrease **12%** compared to Aug-2025
 Increase **20.8%** compared to Sep-2024

Unroasted and decaffeinated coffee

Value: **4.1** mil. USD
 Decrease **67.2%** compared to Aug-2025
 Decrease **42.9%** compared to Sep-2024

Instant coffee

The average export price in Sep-2025 is **12.038** USD/ton; decrease **4.3%** compared to the previous month; and increase **10.5%** compared to the same month 2024.

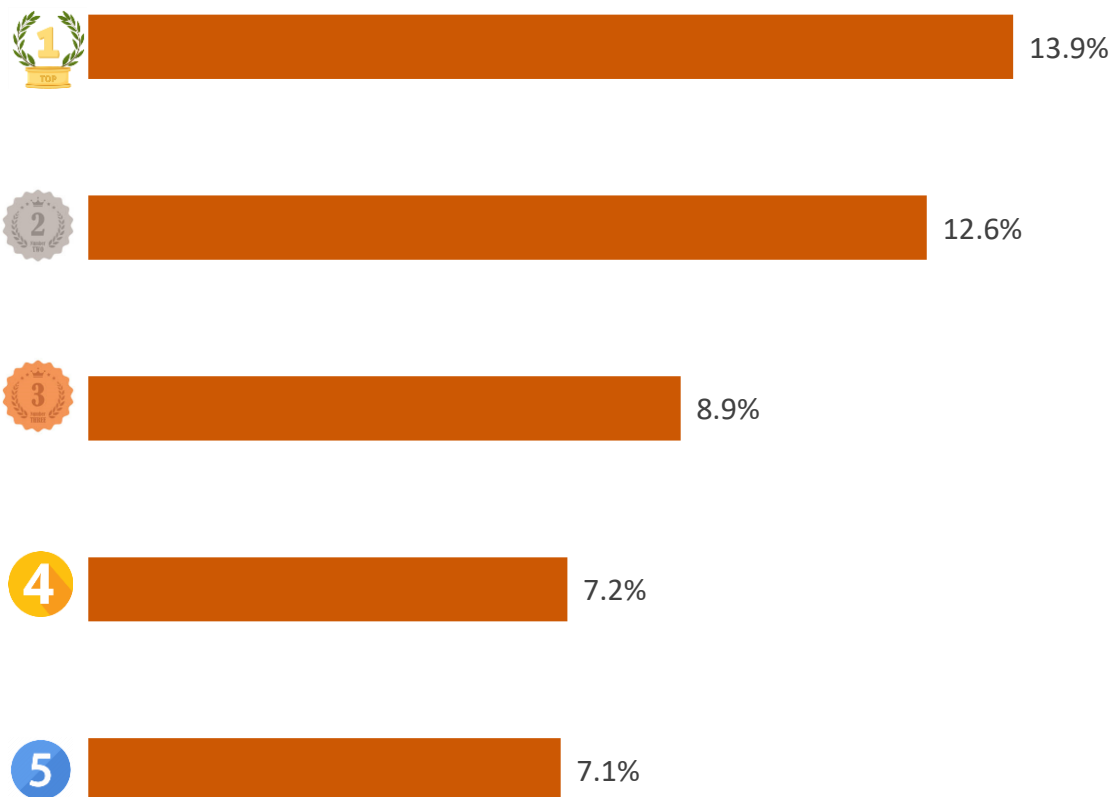
Unroasted & not decaffeinated coffee

The average export price in Sep-2025 is **4.946** USD/ton; increase **8.1%** compared to the previous month; and decrease **2.2%** compared to the same month 2024.

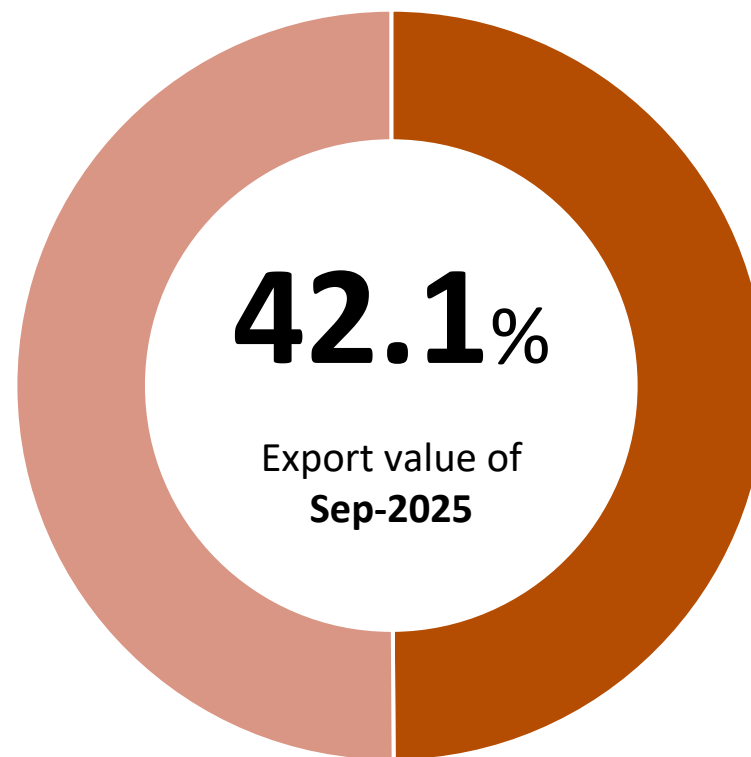


COFFEE

TOP 5 export enterprises by value to the EU, Sep-2024



Value ratio of TOP 5 export enterprises to the EU, Sep-2024





COFFEE



SPOTLIGHTS

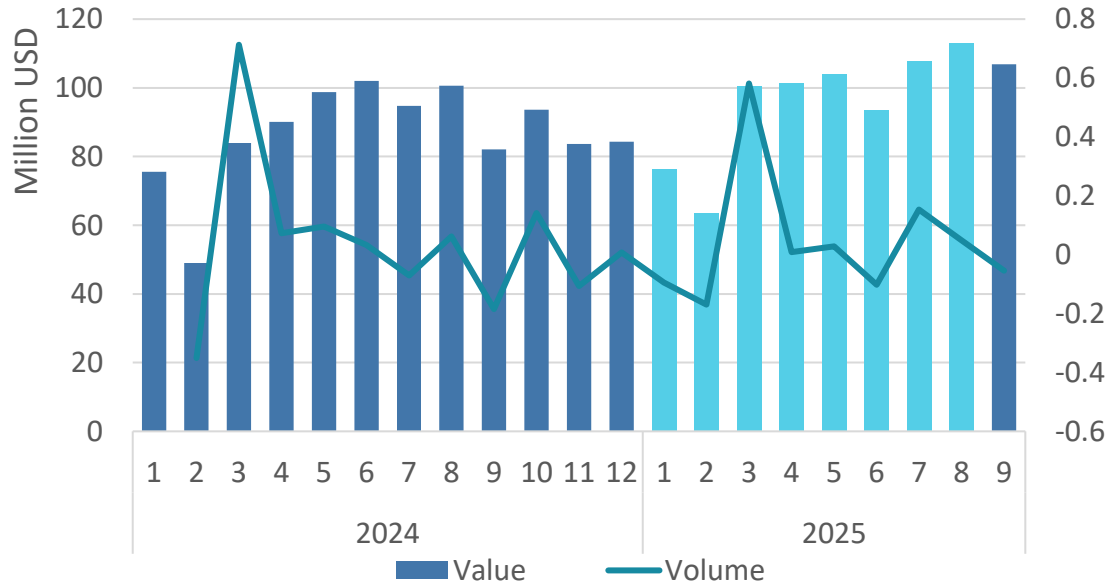
The European Commission (EC) proposed a series of targeted simplification measures to support the implementation of the EU Deforestation-Free Regulation (EUDR), which is scheduled to take effect on December 30, 2025. This action was introduced in parallel with a proposal to postpone the regulation's enforcement for an additional year, until December 30, 2026, due to concerns that the EU's centralized due diligence and reporting system is not yet ready.

The simplification measures focus on decreasing the compliance burden, particularly for smallholders in countries classified as "low-risk." Accordingly, these countries will only be required to submit a single declaration within the EUDR system instead of continuous reporting. The compliance process at the import stage will also be streamlined, with the responsibility for the due diligence declaration belonging solely to the primary importer. The transitional period is divided by business size: large enterprises are granted an extension until June 30, 2026; and small businesses until December 30, 2026.



SEAFOOD

Export value to the EU, Sep-2025



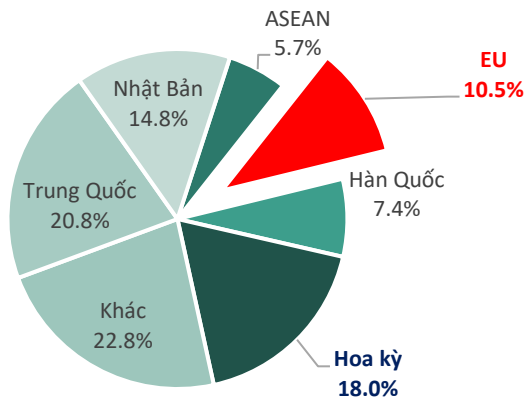
Export results to the EU, Sep-2025

VALUE

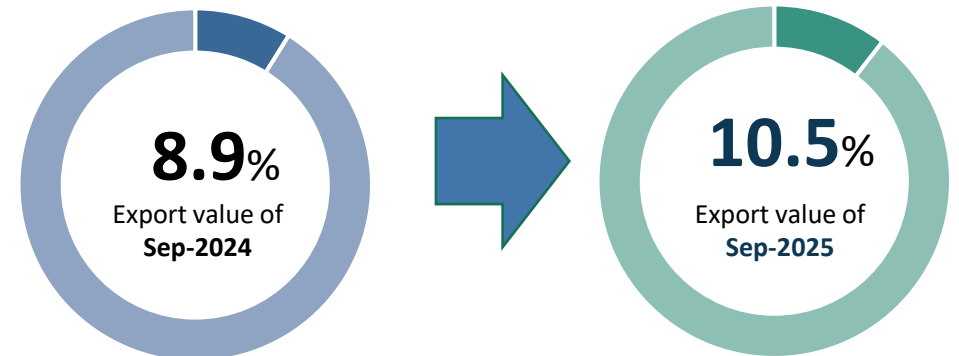
106.9 *mil. USD*

- ↘ Decrease **4.9%** compared to Aug-2025
- ↗ Increase **30.2%** compared to Sep-2024
- ▲ **20.3 mil. USD** more than compared to average rate in 2024
- ❖ Accumulated 9 months of 2025 reaches **866.7 mil. USD**, **83.5%** of total 2024

Percentage of export value to the EU, Sep-2025



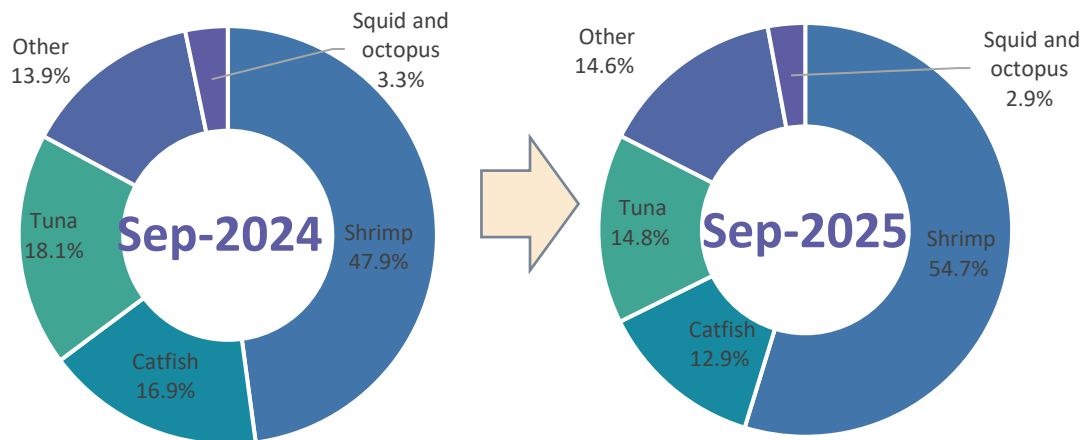
Changes in percentage of export value to the EU, Sep-2025



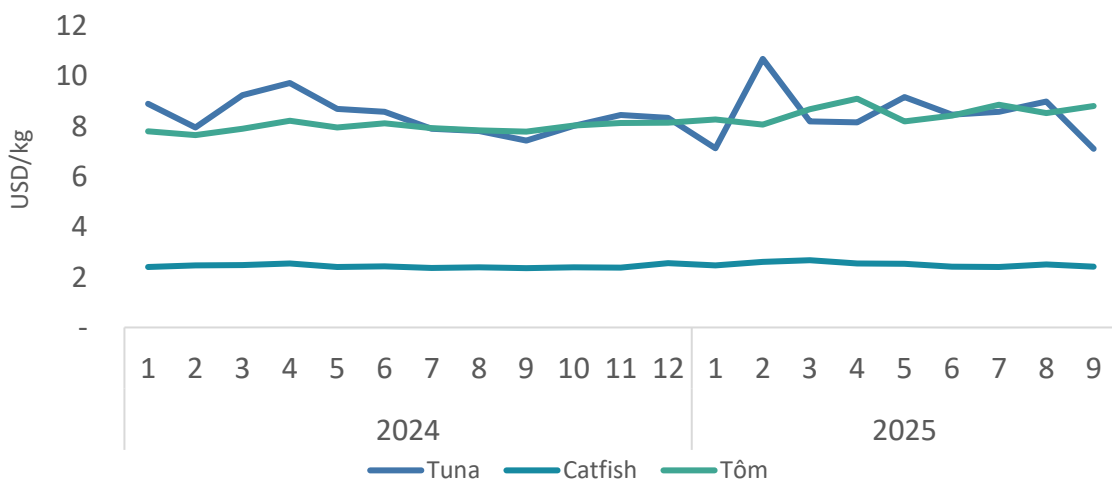


SEAFOOD

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



Average export price to the EU, Sep-2025



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



Shrimp

Value: **58.5** mil. USD

Decrease **8.0%** compared to Aug-2025

Increase **48.9%** compared to Sep-2024



Catfish

Value: **13.8** mil. USD

Decrease **15.0%** compared to Aug-2025

Decrease **0.4%** compared to Sep-2024



Tuna

Value: **15.8** mil. USD

Decrease **2.7%** compared to Aug-2025

Increase **6.9%** compared to Sep-2024

Tuna

The average export price in Sep-2025 is **7.0** USD/kg; decrease **20.9%** compared to the previous month; and decrease **4.3%** compared to the same month 2024.

Catfish

The average export price in Sep-2025 is **2.4** USD/kg; decrease **3.2%** compared to the previous month; and increase **2.7%** compared to the same month 2024.

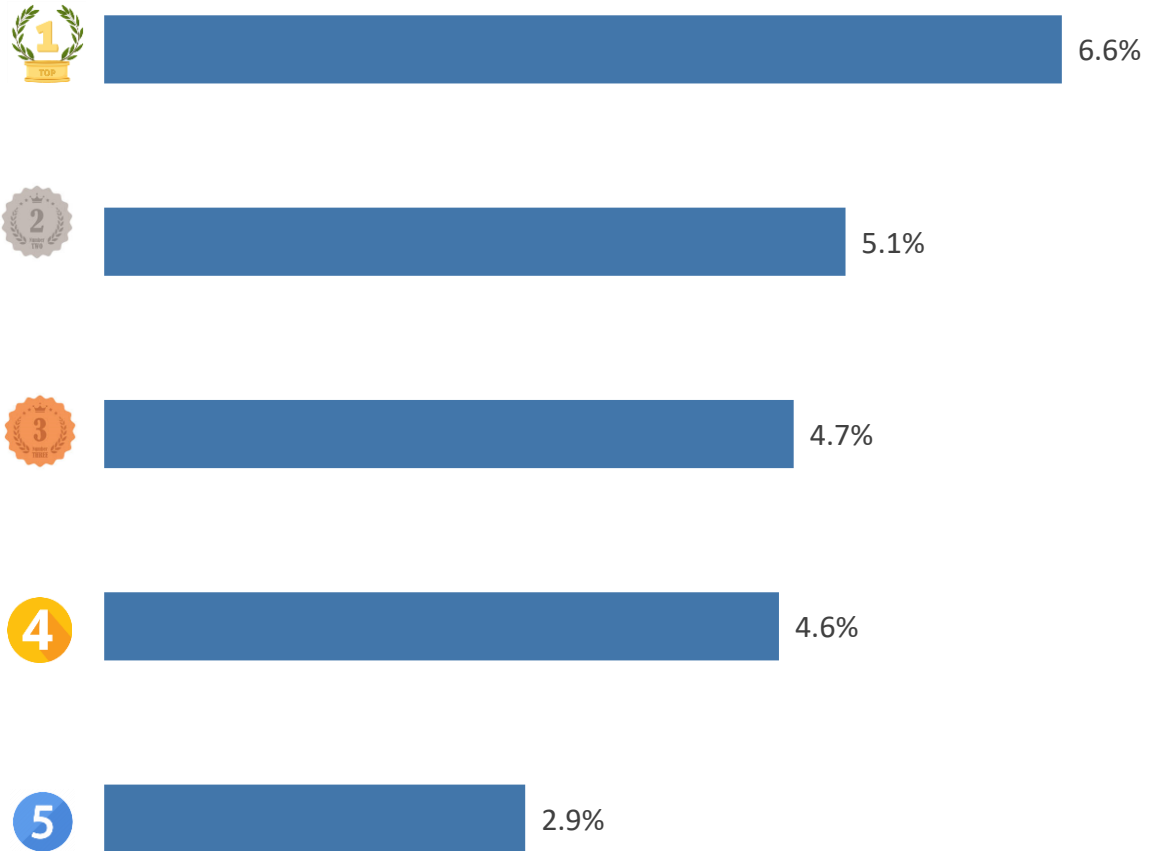
Shrimp

The average export price in Sep-2025 is **8.8** USD/kg; increase **3.3%** compared to the previous month; and increase **13.1%** compared to the same month 2024.

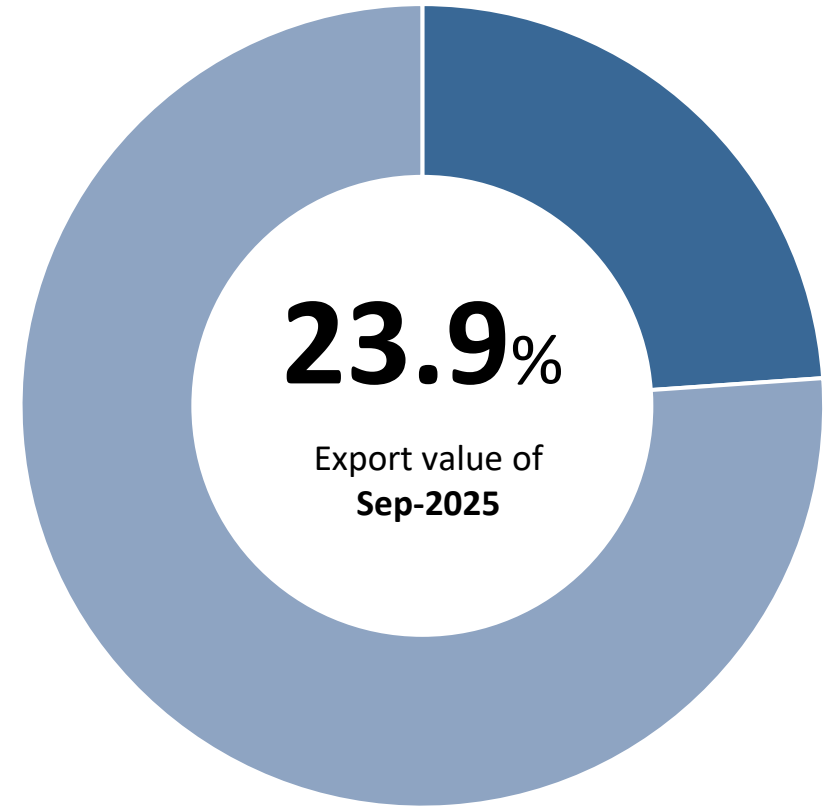


SEAFOOD

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



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



SPOTLIGHTS

Vietnamese shrimp ranks third position in the EU, competing strongly with Ecuador and India

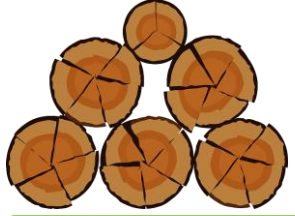
Vietnam's shrimp exports to the EU in the first nine months of 2025 reached 434 million USD, an increase of 21% over the same period, and 48% in September. Whiteleg shrimp accounts for approximately 80% of the value, of which over 50% are processed products. Vietnamese shrimp products compete directly with those from Ecuador and India.

Vietnam benefits from the EVFTA and its European-standard processing capabilities, aligning with sustainable consumption trends. However, businesses face new requirements regarding traceability, environmental impact, and supply chain compliance, along with risks from the IUU "yellow card".

In the context of increasing price competition, businesses are recommended to focus on ready-processed products, enhance digital traceability, and cooperate directly with retail chains. The outlook for the fourth quarter of 2025 and the year 2026 is considered positive, but global oversupply may continue to exert pressure on prices.

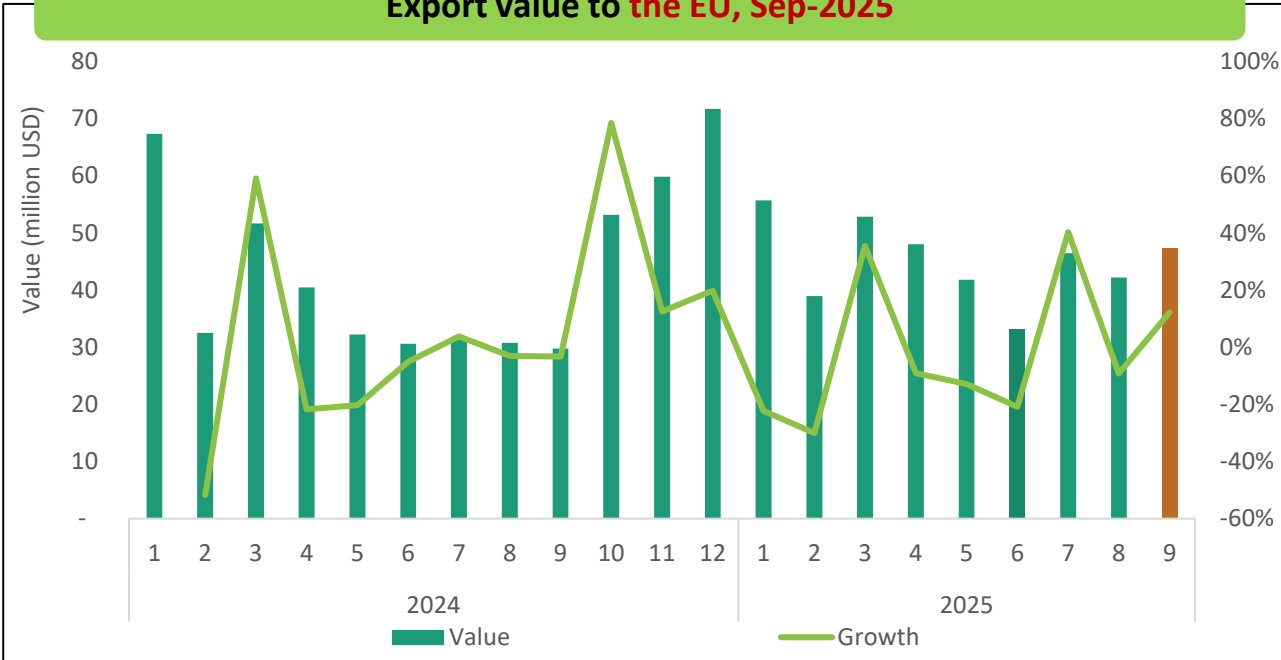
Source: Vasep





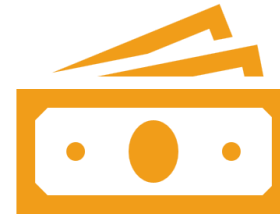
WOOD AND WOODEN PRODUCTS

Export value to the EU, Sep-2025



Export results to the EU, Sep-2025

VALUE

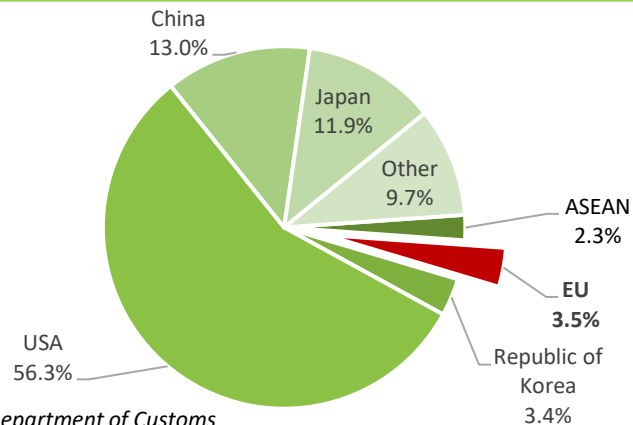


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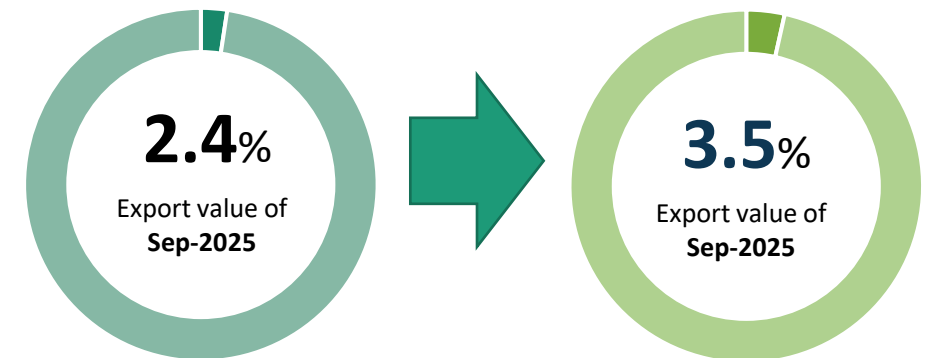
mil. USD

- Increase **12.2%** compared to Aug-2025
- Increase **59.0%** compared to Sep-2024
- **3.0 mil. USD** more than compared to monthly average in 2024
- ❖ Accumulated 9 months of 2025 reaches **406.5 mil. USD, 76.4%** of total 2024

Percentage of export value to the EU, Sep-2025



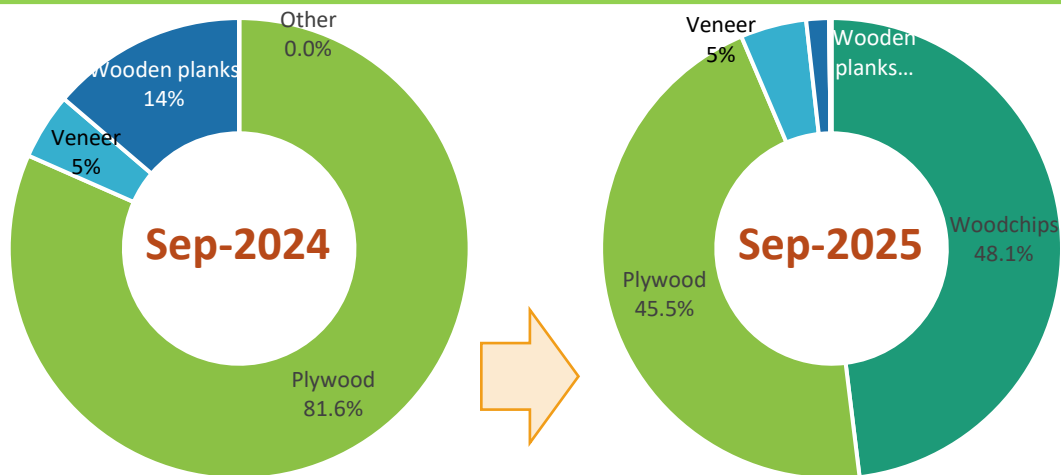
Changes in percentage of export value to the EU, Sep-2025





WOOD AND WOODEN PRODUCTS

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



Export results to the EU, Sep-2025



Woodchips

Value: **7.7** mil. USD

Increase **100%** compared to Aug-2025

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



Plywood

Value: **7.3** mil. USD

Increase **11%** compared to Aug-2025

Increase **432%** compared to Sep-2024



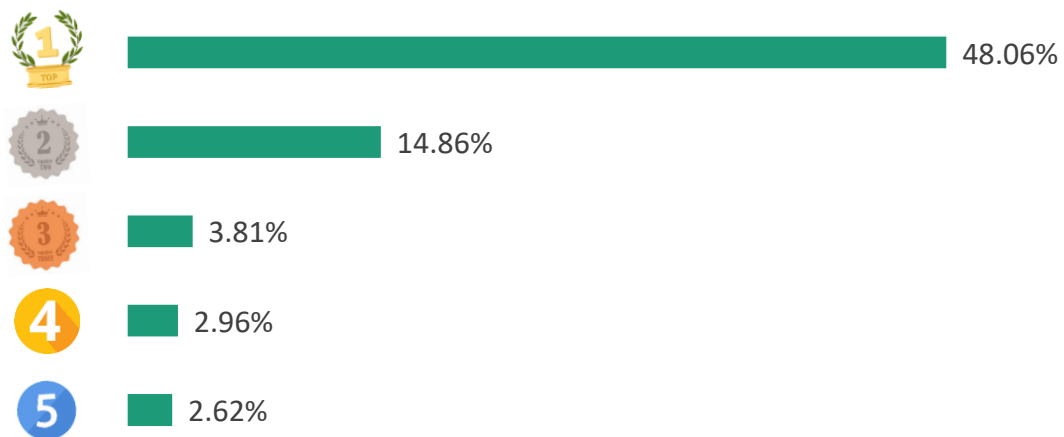
Veneer

Value: **740** ngin USD

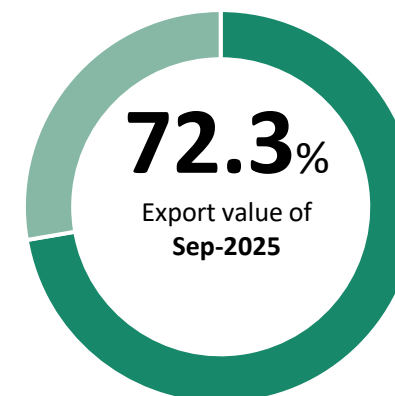
Increase **173%** compared to Aug-2025

Increase **851%** compared to Sep-2024

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



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





SPOTLIGHTS

A key policy development for the EU timber market in October 2025 was the European Commission's (EC) announcement of a proposal to amend the EU Deforestation-Free Regulation (EUDR). The EC officially confirmed that they do not postpone the regulation's general enforcement date, and the effective date remains unchanged at December 30, 2025.

Instead, the EC proposed several "simplification measures," including a 12-month compliance extension exclusively for micro and small operators, and delaying the start of enforcement checks by member states until after June 30, 2026.





FRUITS AND VEGETABLES (EXPORT)

Export volume and value to the EU, Sep-2025



Export results to the EU, Sep-2025



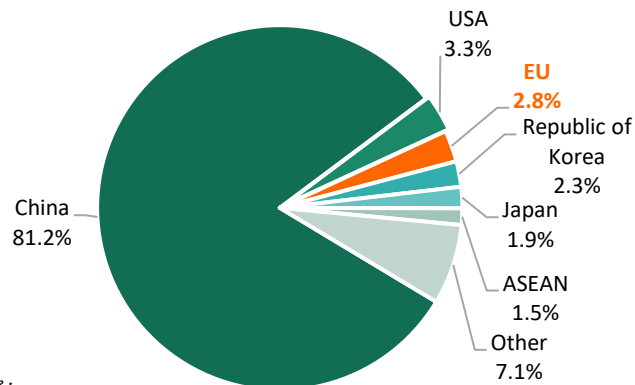
Decrease **19.7%** compared to Aug-2025

Increase **130.0%** compared to Sep-2024

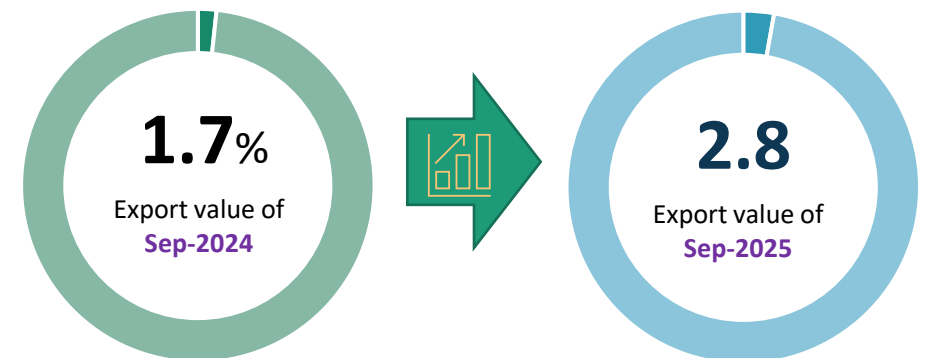
10.3 mil. USD more than compared to monthly average in 2024

Accumulated 9 months of 2025 reaches **365.5 mil.USD**, **115.7%** of total 2024

Percentage of export value to the EU, Sep-2025



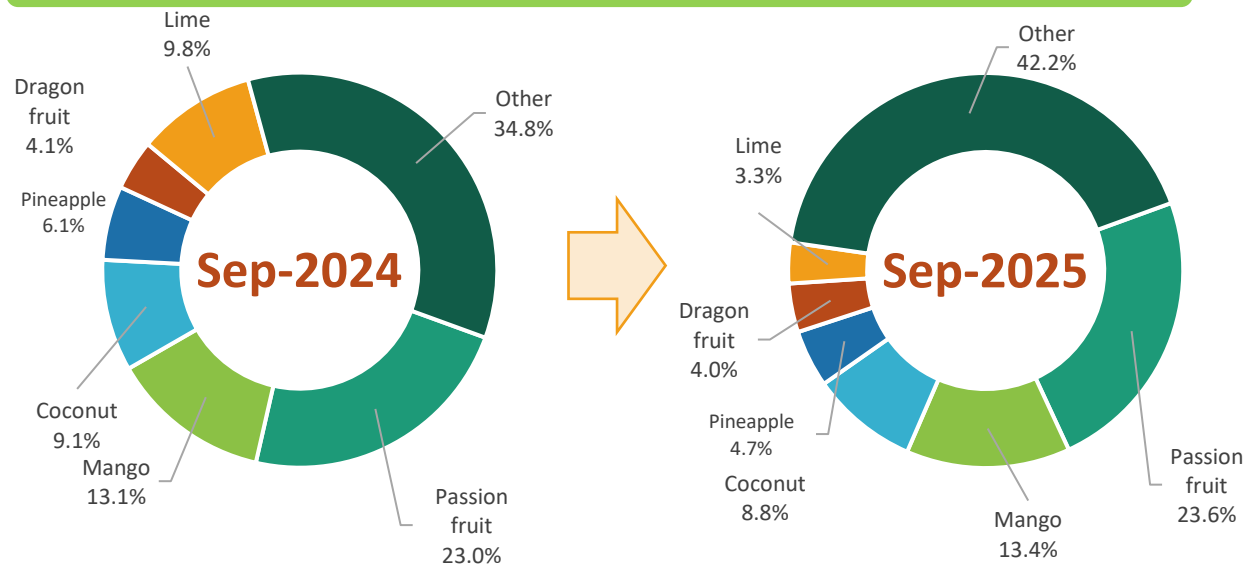
Changes in percentage of export value to the EU, Sep-2025





FRUITS AND VEGETABLES (EXPORT)

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



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



Passion fruit

Value: **8.7** mil. USD

Decrease **14.1%** compared to Aug-2025

Increase **136.2%** compared to Sep-2024



Mango

Value: **4.9** mil. USD

Decrease **28.6%** compared to Aug-2025

Increase **135.4%** compared to Sep-2024



Coconut

Value: **3.2** mil. USD

Decrease **3.6%** compared to Aug-2025

Increase **120.4%** compared to Sep-2024



Pineapple

Value: **1.7** mil. USD

Decrease **33.7%** compared to Aug-2025

Increase **77.7%** compared to Sep-2024



Dragon fruit

Value: **1.5** mil. USD

Increase **21.2%** compared to Aug-2025

Increase **122.5%** compared to Sep-2024



Lime

Value: **1.2** mil. USD

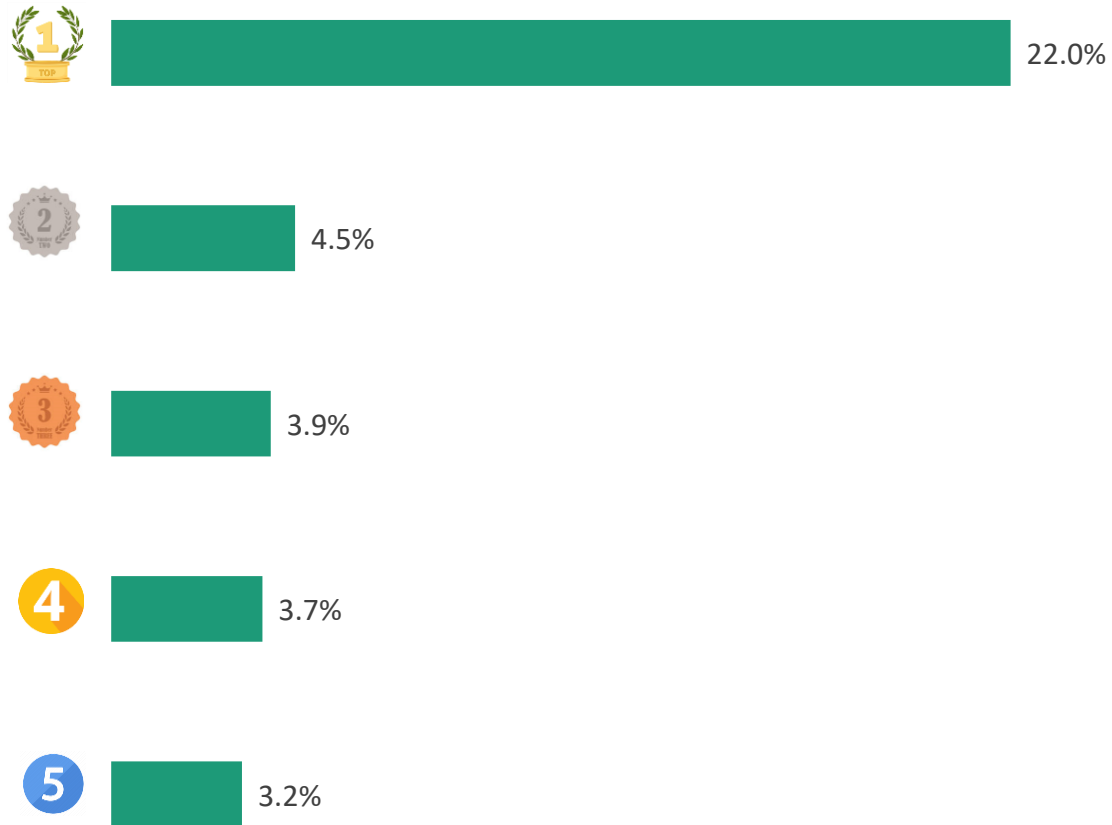
Decrease **16.0%** compared to Aug-2025

Decrease **21.2%** compared to Sep-2024

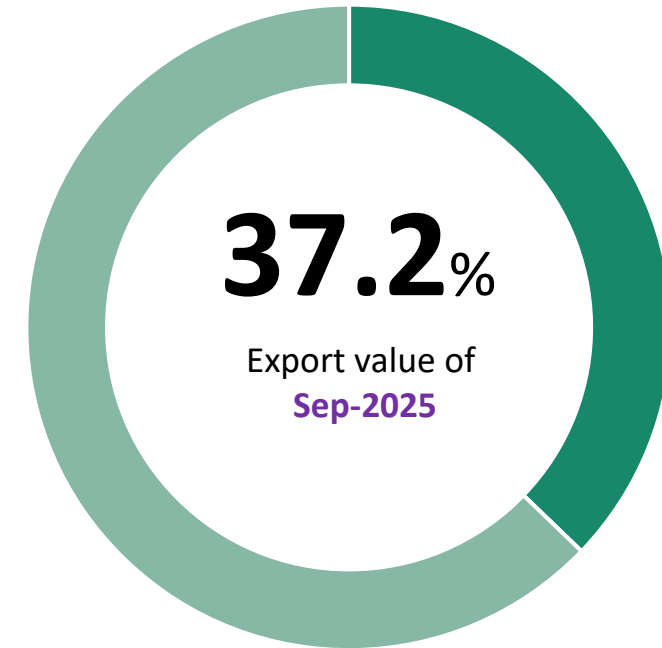


FRUITS AND VEGETABLES (EXPORT)

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



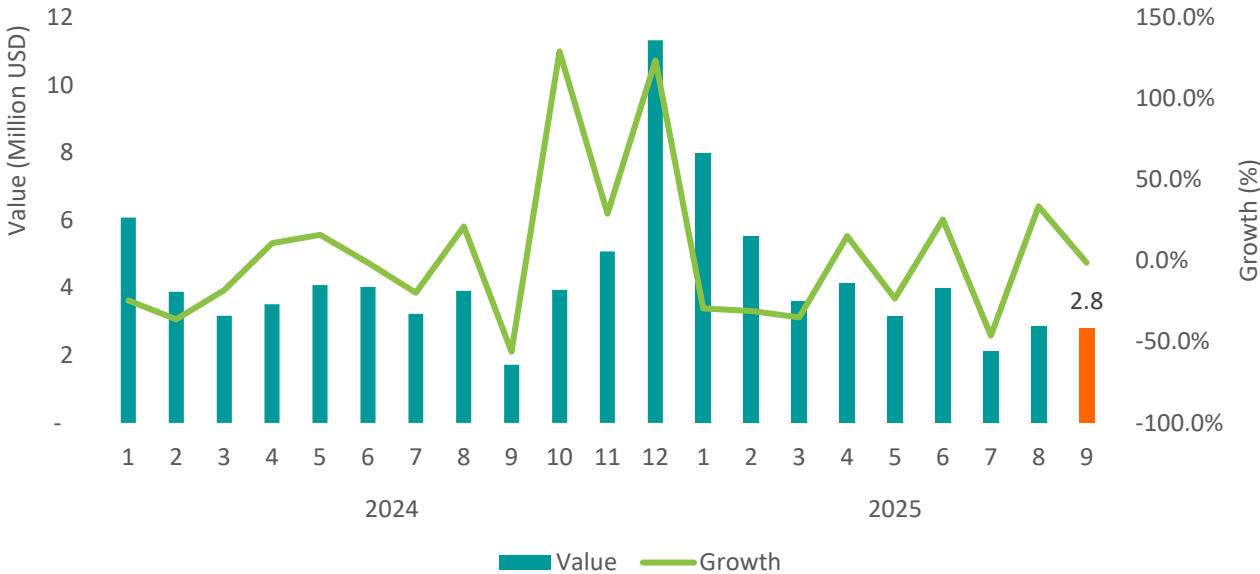
Value ratio of TOP 5 export enterprises to the EU, Sep-2025





FRUITS AND VEGETABLES (IMPORT)

Import volume and value from the EU, Sep-2025



Import results from the EU, Sep-2025

VALUE

2.8
mil. USD



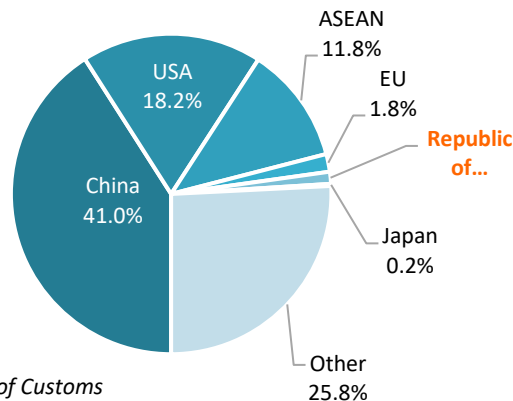
Decrease **1.3%** compared to Aug-2025

Increase **63.4%** compared to Sep-2024

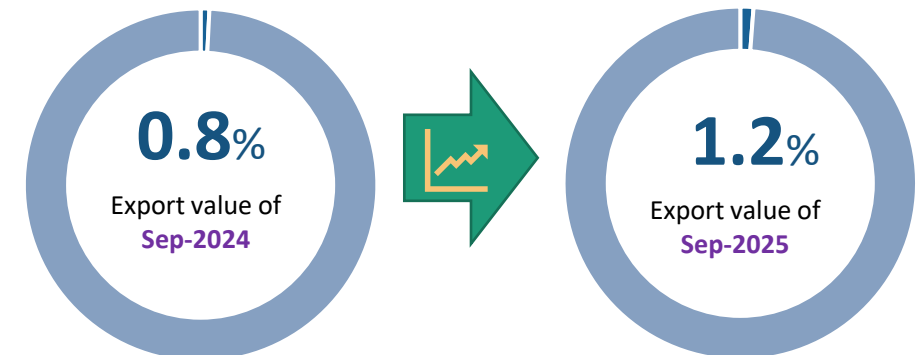
1.69 mil. USD less than compared to monthly average in 2024

Accumulated 8 months of 2025 reaches **36.1 mil. USD**, **67.0%** of total 2024

Percentage of import value from the EU, Sep-2025



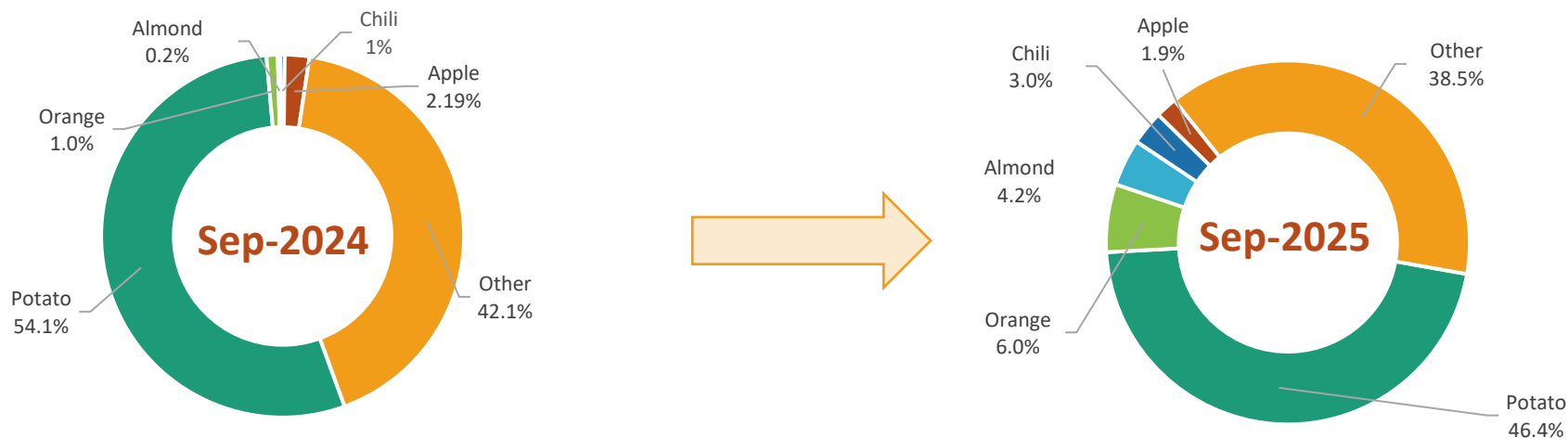
Changes in percentage of import value from the EU, Sep-2025





FRUITS AND VEGETABLES (IMPORT)

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



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



Potato

Value: **1.3** mil. USD

Increase **25.4%** compared to Aug-2025

Increase **40.0%** compared to Sep-2024



Orange

Value: **169.4** thousand USD

Decrease **10.9%** compared to Aug-2025

Increase **885.1%** compared to Sep-2024



Almond

Value: **117** thousand USD

62 times more than compared to Aug-2025

31 times more than compared to Sep-2024

SPOTLIGHTS



Bulgaria supports fruit and vegetable growers after weather-related damages

Bulgaria will spend 7.4 million Euros (equivalent to 7.9 million USD) from the European Union's Crisis Reserve Fund to support fruit and vegetable farmers affected by drought and frost in 2025. Minister of Agriculture Georgi Tahov stated that the country successfully persuaded the European Commission to grant additional funds to ensure farmers receive adequate compensation.

Up to date, approximately 17.7 million USD has been paid to 1,824 growers of sour cherries, sweet cherries, and apricots – the crops that suffered the most severe damage. The payments are based on technological maps that closely reflect actual production costs. Minister Tahov affirmed that all eligible farmers will be compensated and committed to continuing to protect the industry's interests against climate fluctuations.

Source: Freshplaza.com



SPOTLIGHTS



France's apple production forecast to decrease by 4% in 2025

France's apple production in 2025 will be about 1.5 million tons, a 4% decrease compared to 2024, but higher than the five-year average production. This decline is not uniform across regions, with some areas experiencing a sharp decrease due to the impact of high temperatures and pests. Early-season apple prices this year are lower than in 2024, due to decreased demand in September coinciding with an abundant supply. Regarding the overall outlook, although production remains stable, profits may decrease due to low early-season prices and unfavorable cultivation conditions in some localities.

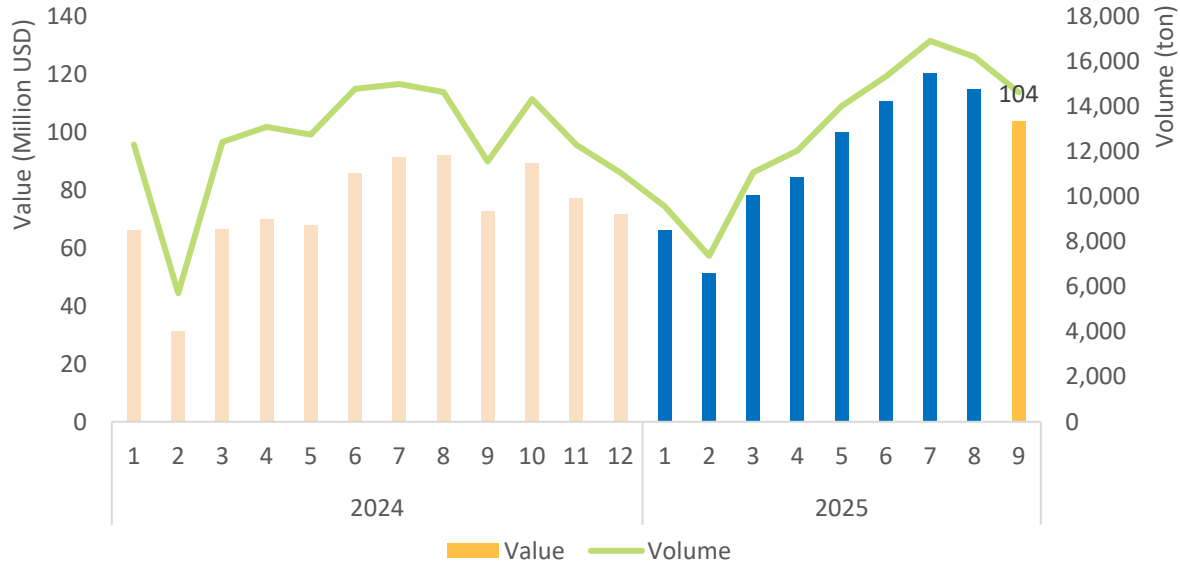


Source: Freshplaza.com



CASHEW NUTS

Export volume and value to the EU, Sep-2025



Export results to the EU, Sep-2025

VALUE

103.7

mil. USD

- ↘ Decrease **9.6%** compared to Aug-2025
- ↗ Increase **42.6%** compared to Sep-2024
- ↑ **30.2 mil. USD** more than compared to monthly average in 2024
- ❖ Accumulated 9 months of 2025 reaches **829 tr.USD, 94%** of total 2024

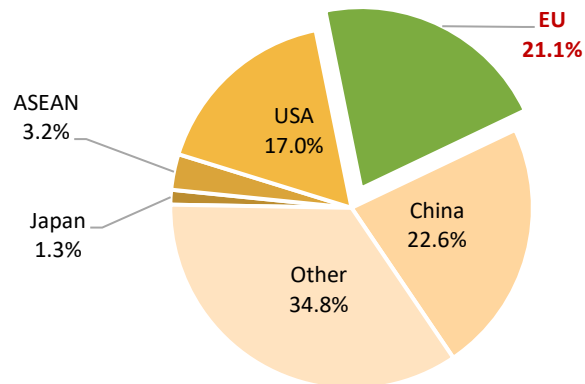
VOLUME

14.6

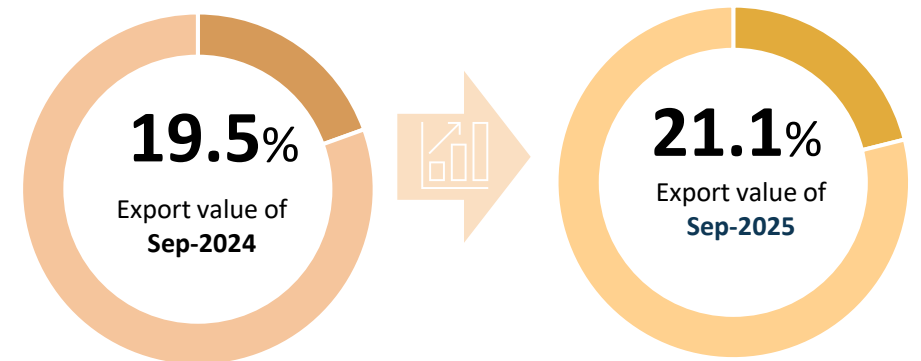
thousand tons

- ↘ Decrease **9.8%** compared to Aug-2025
- ↗ Increase **26.5%** compared to Sep-2024
- ↑ **2.1 thousand tons** more than compared to monthly average in 2024
- ❖ Accumulated 9 months of 2025 reaches **117 thousand tons, 78%** of total 2024

Percentage of export value to the EU, Sep-2025



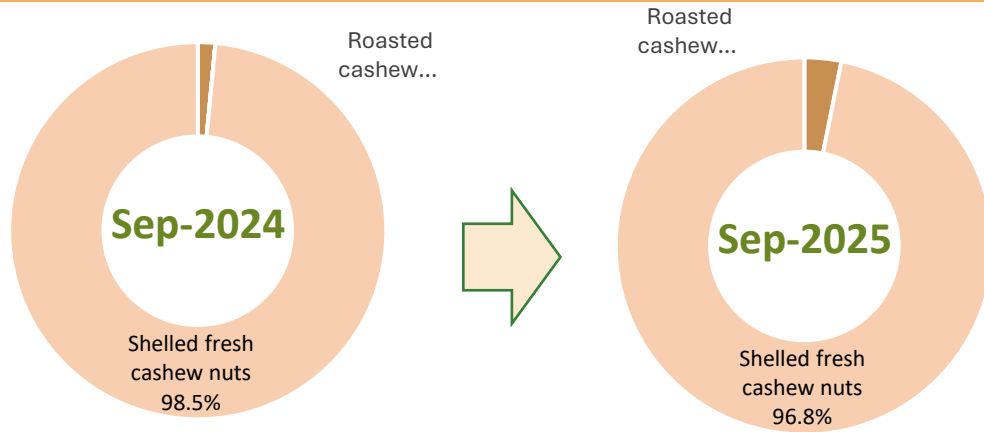
Changes in percentage of export value to the EU, Sep-2025



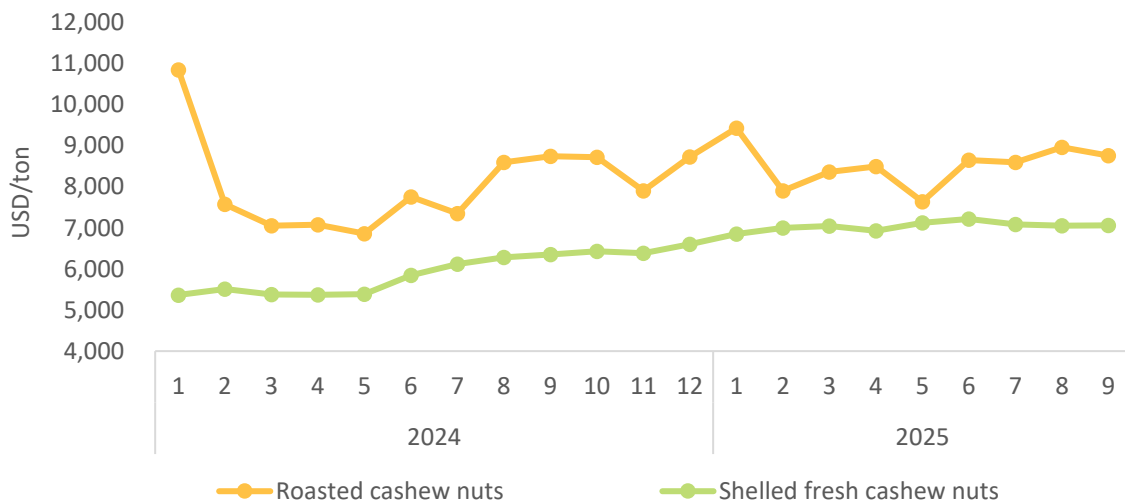


CASHEW NUTS

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



Average export price to the EU, Sep-2025



Export results to the EU, Sep-2025



Shelled fresh cashew nuts

Value: **100.4** mil. USD

Decrease **9.8%** compared to Aug-2025

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



Roasted cashew nuts

Value: **3.3** mil. USD

Decrease **1.8%** compared to Aug-2025

Increase **200%** compared to Sep-2024

Shelled fresh cashew nuts

The average export price in Sep-2025 is **7.059** USD/ton; **increase 0.05%** compared to the previous month; and **increase 11.1%** compared to the same month 2024.

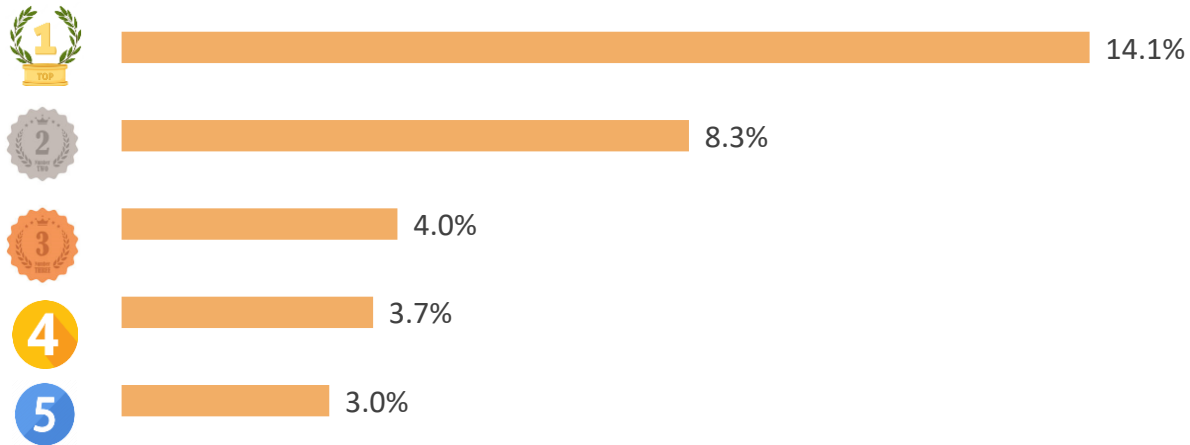
Roasted cashew nuts

The average export price in Sep-2025 is **8.755** USD/ton; **decrease 2.3%** compared to the previous month; and **increase 0.2%** compared to the same month 2024.

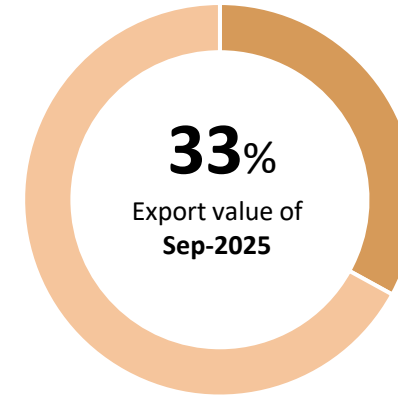


CASHEW NUTS

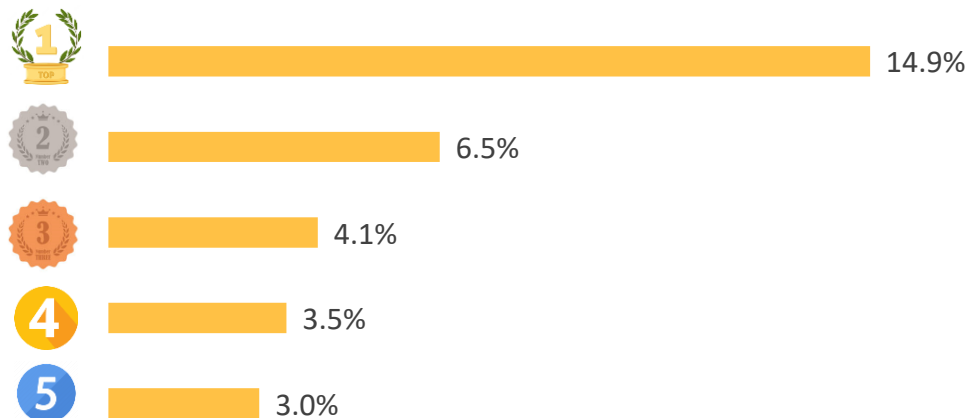
TOP 5 export enterprises by value to the EU, Sep-2025



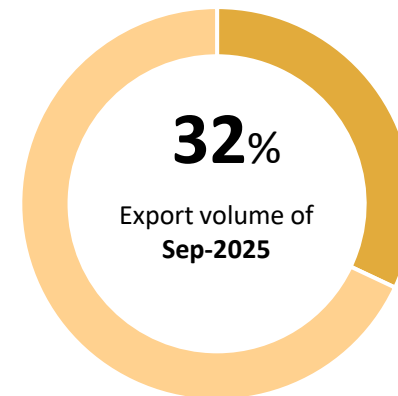
Value ratio of TOP 5 export enterprises to the EU, Sep-2025



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



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



CASHEW NUTS

SPOTLIGHT



In the first 9 months of 2025, the European Union (EU) continued to maintain its position as the Vietnam's largest cashew import markets, accounting for over 21.1% of the volume and 22% of the total export value. Vietnam's cashew exports to the EU reached 117 thousand tons, equivalent to 829.5 million USD, an increase of 4.3% in volume and 28.9% in value compared to the same period last year.

The EU is considered as a key market for Vietnam's cashew sector, of which Netherlands and Germany play role of commercial and distribution hubs for cashews to many other countries in the region.

In the end-year months of 2025, the EU's cashew imports will maintain their growth momentum, driven by peak consumption demand during the Christmas and New Year holidays. The main imported products are shelled cashews, aligning with consumer trends for convenience and safety. Vietnam will continue to hold its role as a major supplier, while Ivory Coast and some emerging suppliers like Brazil and Indonesia are expanding their market share, indicating increasingly fierce competition in the EU market.

Source: Agency of Foreign Trade (Ministry of Industry and Trade)





For feedback, please send to:

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