

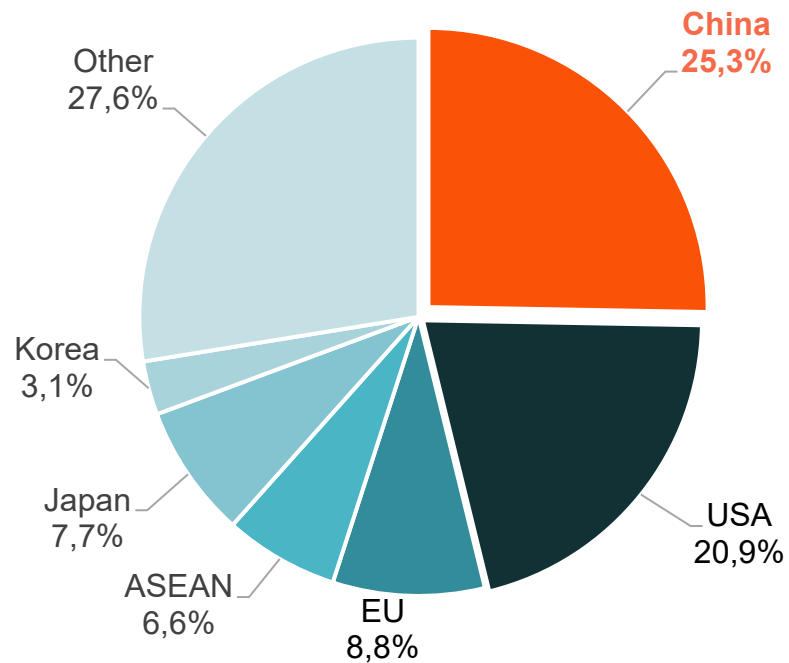
MONTHLY REPORT ON AGRI-PRODUCT EXPORT

FROM VIETNAM TO China MARKET



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

Percentage of AFF product export value to the **China, Nov-2025**

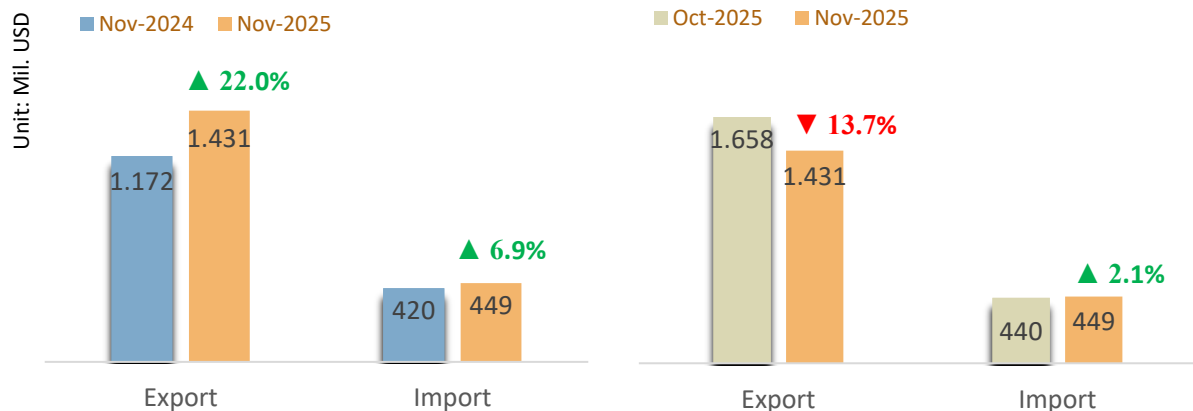


Changes in percentage of AFF product export value to the **China, Nov-2025 compared to Oct-2025 and Nov-2024**

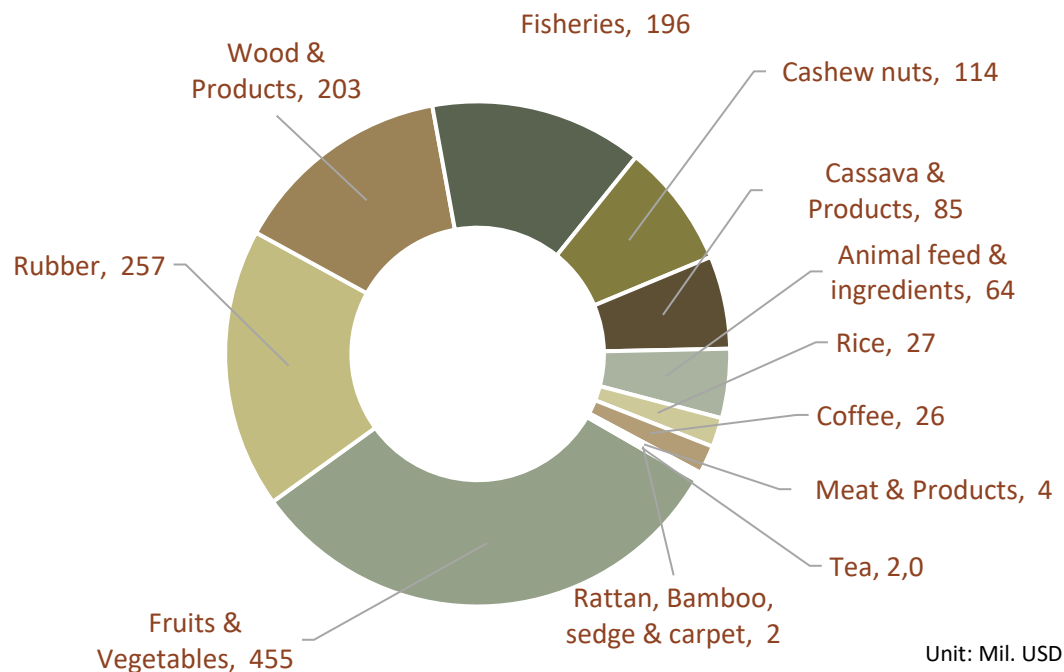
Market	Value (mil. USD)	Compared to Oct-2025	Compared to Nov-2024
China	1.431	▼ 2.2%	▲ 3.4%
USA	1.182	▼ 0.6%	▼ 1.7%
EU	498	▲ 0.8%	▲ 0.9%
ASEAN	375	▲ 0.5%	▼ 4.0%
Japan	437	▲ 0.4%	▲ 1.2%
Korea	176	▼ 0.2%	▼ 0.9%
Total value of	5.658		

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

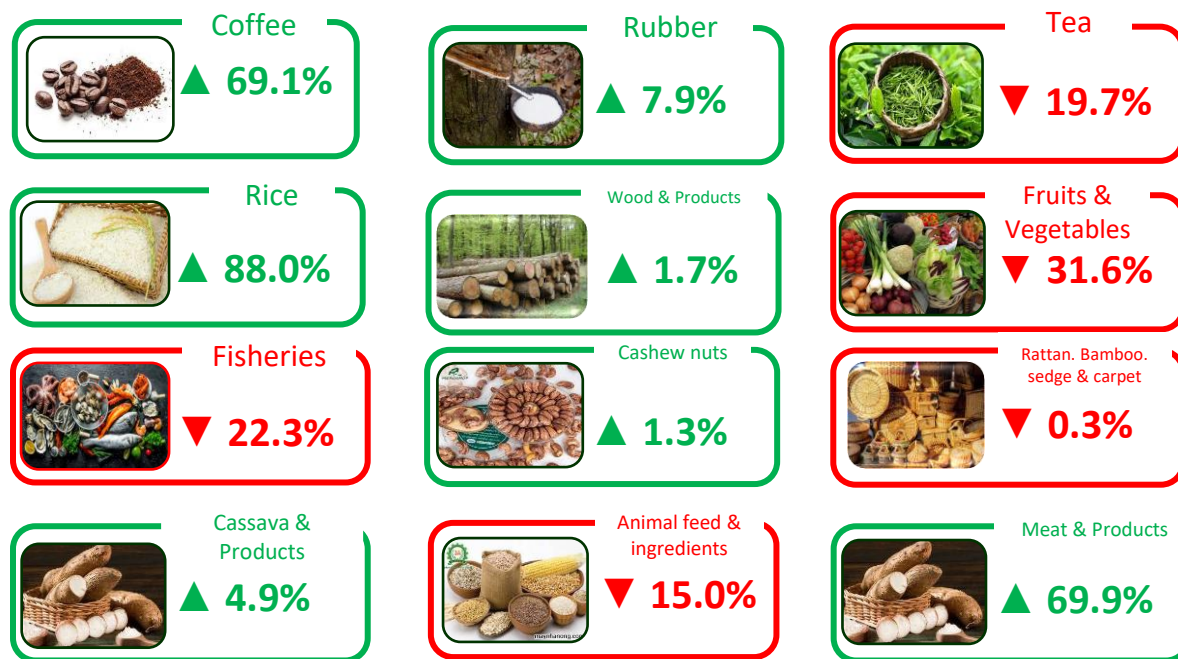
AFF product import-export turnover between Vietnam and China, Nov-2025



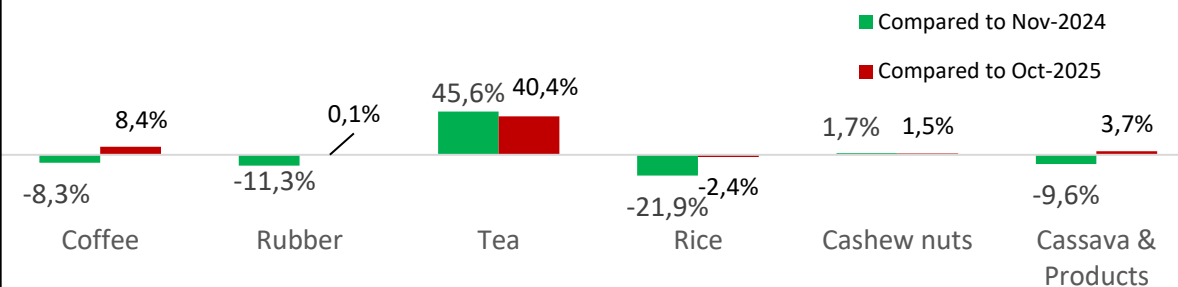
Key AFF product export value to China, Nov-2025



Changes in key AFF product export value to China in Nov-2025 compared to Oct-2025



Changes in average export value of key AFF products to China in Nov-2025 compared to Nov-2024 and compared to Oct-2025



China's Economy in 2025 and New Records

The year 2025 marks a special milestone for China's economy, with many impressive new records. Specifically:

- (i) Grain output reached a record high of 714.9 billion kg, an increase of 8.4 billion kg compared with 2024;
- (ii) As of November 30, the number of express delivery parcels in China surpassed 180 billion items;
- (iii) The total revenue of the Top 500 largest service enterprises in China

exceeded RMB 500 trillion (approximately USD 71.5 trillion);

(iv) On December 2, the cargo throughput of Danshan Port (Ningbo, Zhejiang) surpassed 40 million TEUs for the first time;

(v) The trade surplus in 11 months of the year exceeded USD 1 trillion for the first time;

(vi) China ranked among the top 10 countries/economies with the highest Global Innovation Index in the world;

(vii) In October, sales of new energy vehicles (NEVs) in China accounted for

51.6% of total new vehicle sales nationwide;

(viii) In August, total civil aviation freight turnover reached 15.18 billion tonne-kilometers, up 8% year-on-year;

(ix) As of November 28, the China–Europe railway freight route operated 12,000 train services, with the total value of goods over USD 490 billion.



Source: Vietnamese.people.vn

China–Vietnam Sign Protocol on Exporting Fresh Jackfruit

On November 27 in Beijing, Minister of Agriculture and Environment Ministry - Trần Đức Thắng and Zhao Zenglian, Deputy Director-General of the General Administration of Customs of China (GACC), signed a Protocol on exporting fresh jackfruit from Vietnam to China. The Protocol took place during the working visit of the Vietnamese Ministry of Agriculture and Environment delegation to China from November 26–28 at the 75th anniversary of diplomatic relations establishment between the two countries.

The China affirmed that agricultural trade cooperation with Vietnam plays an important role. In 2025, two countries signed

four protocols on exporting chili peppers, passion fruit, rice bran, and raw bird's nests.

Minister Tran Duc Thang emphasized that China is an important import–export market for Vietnam. The bilateral trade turnover in the first 10 months of 2025 has already exceeded that of the whole year of 2024. He also expressed the hope that both sides would continue to strengthen cooperation in market access, quarantine and inspection, and investment promotion, thereby contributing to the sustainable development of agricultural, forestry, and fisheries trade between the two countries.

Source: Nongnghiepmoitruong.vn

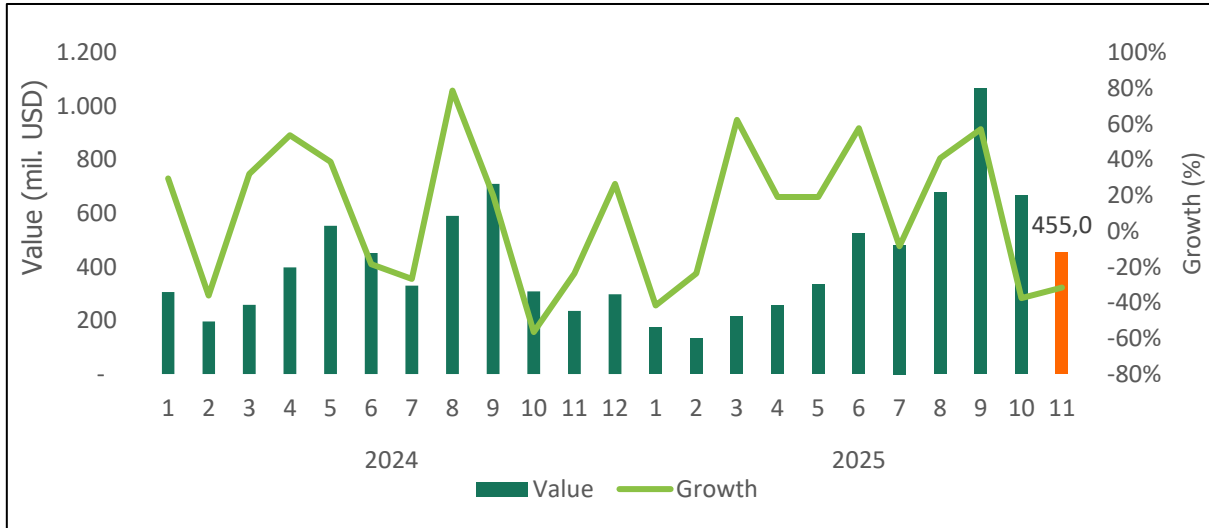


Tin liên quan



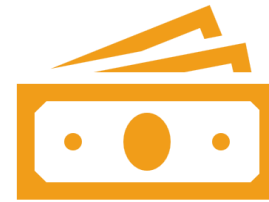
FRUITS & VEGETABLES (EXPORT)

Export volume and value to China, Nov-2025



Export results to China, Nov-2025

VALUE



455.0

mil. USD

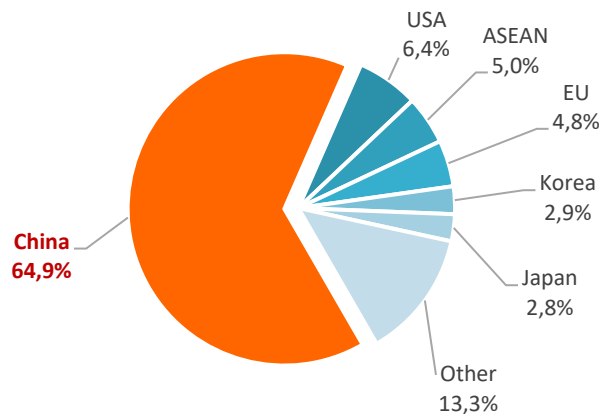
Decrease **31.6%** compared to Oct-2025

Increase **93.0%** compared to Nov-2024

69.0 mil. USD more than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **5.0 bil. USD**, **107.5%** of total 2024

Percentage of export value to China, Nov-2025



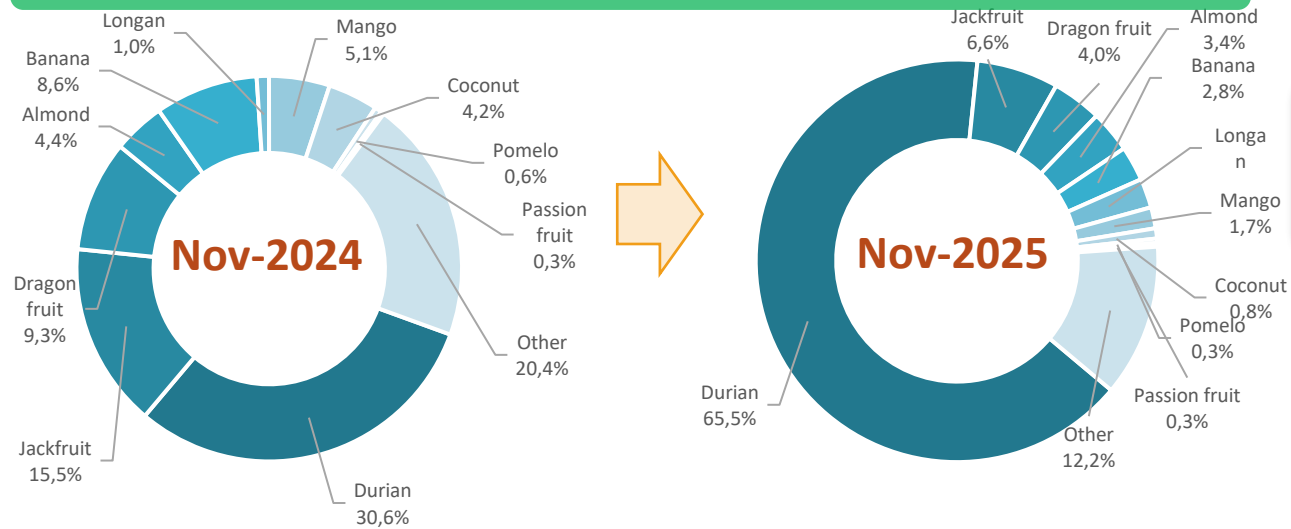
Changes in percentage of export value to China, Nov-2025





FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to China, Nov-2025



Export results of some main products to China, Nov-2025



Durian

Value: **298.1** mil. USD
 Decrease **45.7%** compared to Oct-2025
 Increase **313.1%** compared to Nov-2024



Jackfruit

Value: **30.0** mil. USD
 Increase **358.1%** compared to Oct-2025
 Decrease **17.8%** compared to Nov-2024



Dragon fruit

Value: **18.1** mil. USD
 Increase **5.8%** compared to Oct-2025
 Decrease **17.4%** compared to Nov-2024



Almond

Value: **15.4** mil. USD
 Increase **14.4%** compared to Oct-2025
 Increase **49.0%** compared to Nov-2024



Banana

Value: **12.7** mil. USD
 Increase **9.9%** compared to Oct-2025
 Decrease **37.7%** compared to Nov-2024



Longan

Value: **10.7** mil. USD
 Increase **14.0%** compared to Oct-2025
 Increase **341.8%** compared to Nov-2024



Mango

Value: **7.7** mil. USD
 Decrease **6.1%** compared to Oct-2025
 Decrease **35.9%** compared to Nov-2024



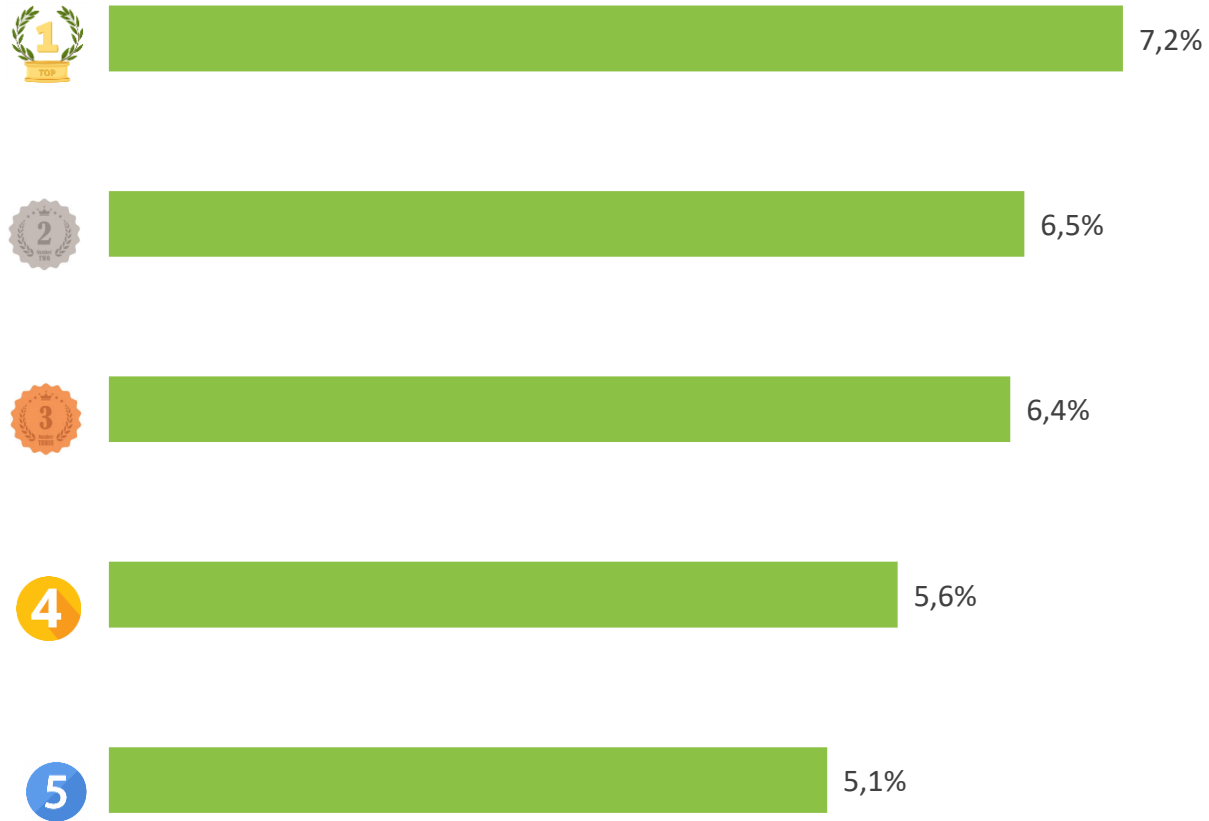
Coconut

Value: **3.7** mil. USD
 Increase **6.9%** compared to Oct-2025
 Decrease **62.5%** compared to Nov-2024

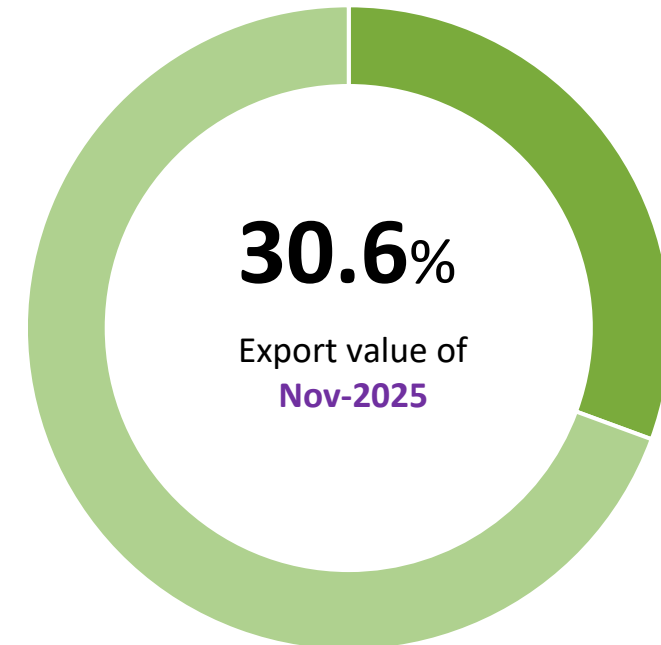


FRUITS & VEGETABLES (EXPORT)

TOP 5 export enterprises by value to **China, Nov-2025**



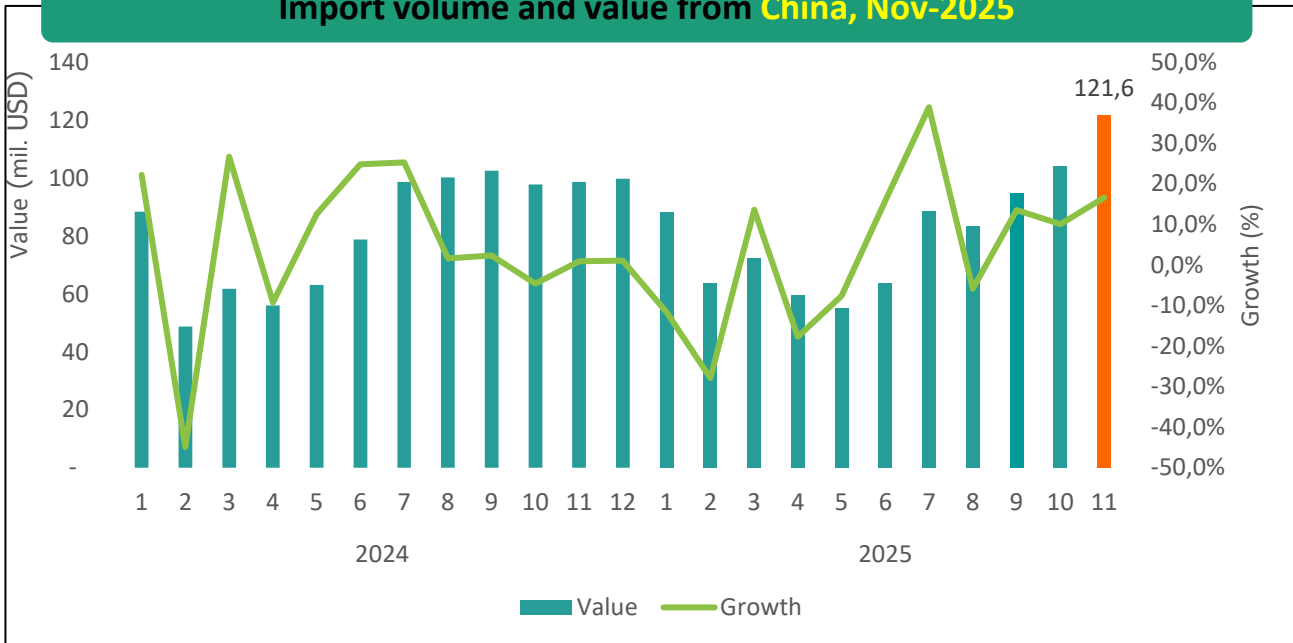
Value ratio of TOP 5 export enterprises to **China, Nov-2025**





FRUITS & VEGETABLES (IMPORT)

Import volume and value from China, Nov-2025



Import results from China, Nov-2025

VALUE



121.6

mil. USD

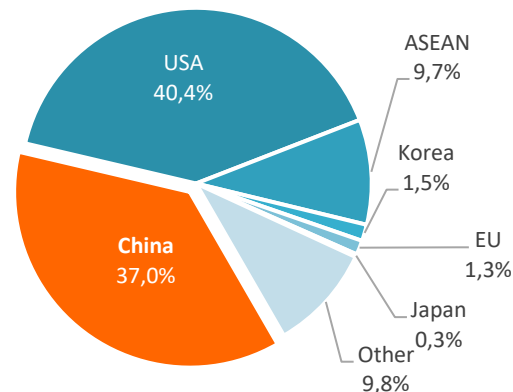
Increase **16.6%** compared to Oct-2025

Increase **23.1%** compared to Nov-2024

38.7 mil. USD more than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **894.4 mil. USD**, **90.0%** of total 2024

Percentage of import value from China, Nov-2025



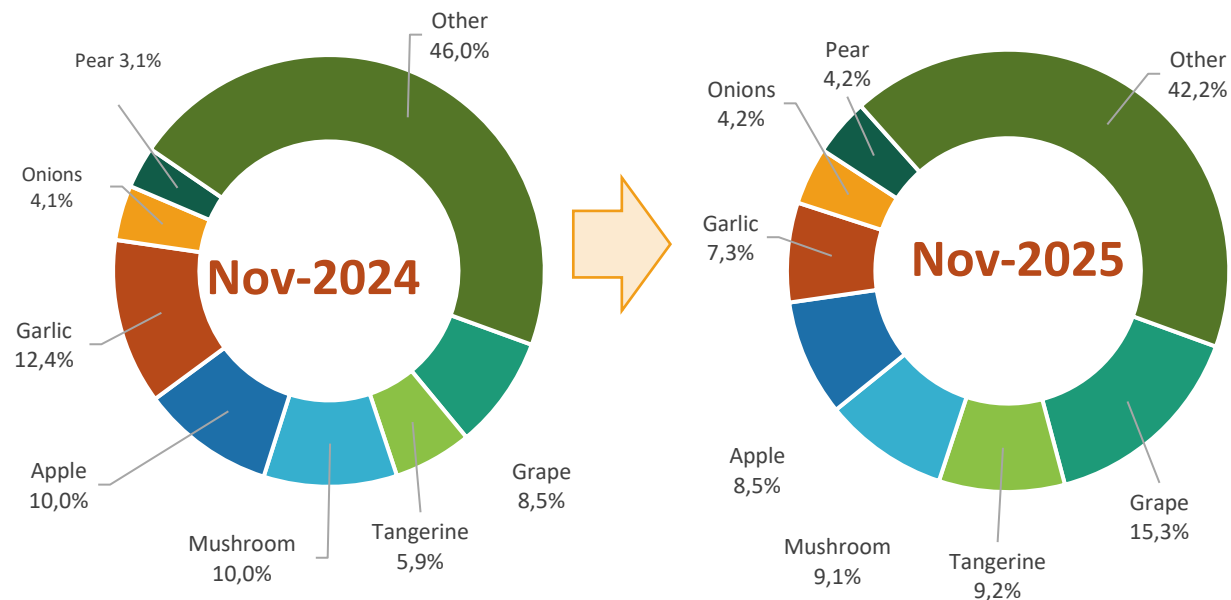
Changes in percentage of import value from China, Nov-2025





FRUITS & VEGETABLES (IMPORT)

Structure of imports by products from China, Nov-2025



Import results of some main products from China, Nov-2025



Grape

Value: **18.6** mil. USD
 Increase **9.5%** compared to Oct-2025
 Increase **122.9%** compared to Nov-2024



Tangerine

Value: **11.2** mil. USD
 Increase **297.8%** compared to Oct-2025
 Increase **92.3%** compared to Nov-2024



Mushroom

Value: **11.1** mil. USD
 Increase **5.9%** compared to Oct-2025
 Increase **12.5%** compared to Nov-2024



Apple

Value: **10.4** mil. USD
 Increase **40.7%** compared to Oct-2025
 Increase **4.8%** compared to Nov-2024



Garlic

Value: **8.9** mil. USD
 Decrease **29.7%** compared to Oct-2025
 Decrease **27.7%** compared to Nov-2024



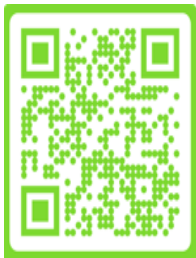
Onions

Value: **5.1** mil. USD
 Increase **16.2%** compared to Oct-2025
 Increase **25.7%** compared to Nov-2024



Pear

Value: **5.1** mil. USD
 Decrease **2.4%** compared to Oct-2025
 Increase **65.5%** compared to Nov-2024



Vietnam's Fruit and Vegetable Exports to China Set a New Record

In 11 months of 2025, China remained Vietnam's largest export market for fruits and vegetables, with export value of USD 4.98 billion, accounting for 64.2% of total export turnover, up 14.8% year-on-year compared with the same period in 2024.

According to the Vietnam Fruit and Vegetable Association (Vinafruit), China is a high-potential market where Vietnam enjoys significant advantages in geographic location and logistics, thanks to direct connections via road, rail, and seaports, which help reduce transportation costs and transit time. It is forecasted that Vietnam's fruit and vegetable exports to China could reach USD 5.5 billion this year.

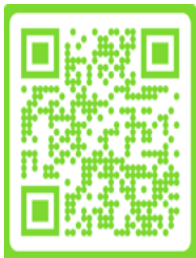
Source: kinhte.congthuong.vn

China Opens Market to Fresh Bananas from Peru

The General Administration of Customs of China (GACC) officially opened market to fresh bananas from Peru, allowing eligible shipments to be imported into China starting from December 2, 2025.

Under the regulations, China only accepts green, unripe bananas with intact peels from approved production areas. Orchards must implement Good Agricultural Practices (GAP) and Integrated Pest Management (IPM), and establish Pest-Free Production Places (PFPPs) for Fusarium wilt of banana, Race 2. If the disease is detected, it must be thoroughly eradicated, and exports from the affected area are suspended for six months. Export bananas must be washed, sorted, and graded, and must be free from quarantine pests and foreign matter.

Source: Guojiguoshu.com



China Opens Market to Fresh Persimmons from South Korea

On December 16, 2025, the General Administration of Customs of China (GACC) issued a notice on phytosanitary requirements and approved the import of fresh persimmons from South Korea that met the relevant standards. After 17 years, South Korea first applied for export approval in 2008, Korean persimmons have been authorized for entry into the Chinese market. South Korean authorities stated that packing facilities are still awaiting review by Chinese authorities, and it is expected that the first export shipments will begin next year.

Source: Guojiguoshu.com

Lao Durian is Going to Chinese Market

On December 12, GACC issued a notice on phytosanitary requirements for fresh durian imported from Laos. Accordingly, Lao's fresh durian met the conditions for import into China thus Laos becomes the sixth country authorized to export durian to China, following Thailand, Vietnam, the Philippines, Malaysia, and Cambodia.

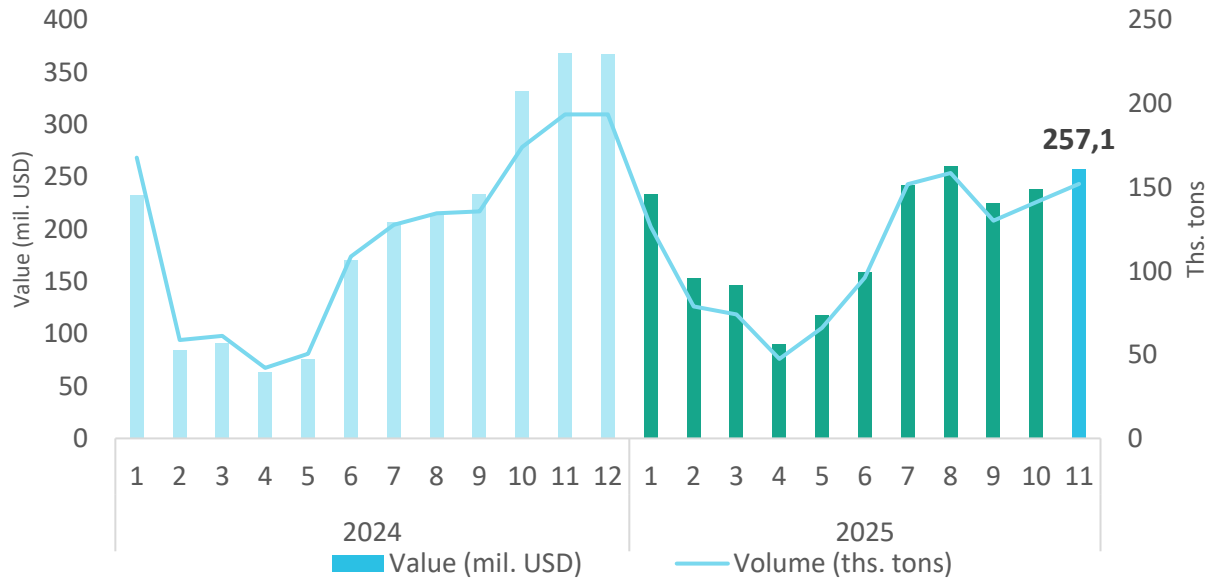
Laos has the advantage of sharing a border with China and being directly connected via the China-Laos Railway, which helps keep logistics and cultivation costs lower than products in Thailand. In addition, Chinese investors are applying new management models to improve farming practices in Laos. If output and quality of Lao durian improve after market access is granted, Lao durian is likely to compete directly with Thai durian, potentially putting further downward pressure on durian prices in the market.

Source: Guojiguoshu.com

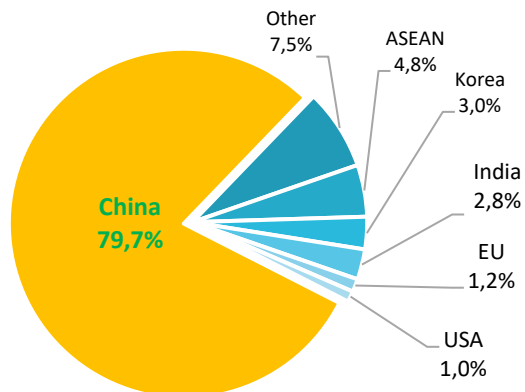


RUBBER

Export volume and value to China, Nov-2025



Percentage of export value to China, Nov-2025



Export results to China, Nov-2025

VALUE

257.1 mil. USD

↗ Increase **7.9%** compared to Oct-2025

↘ Decrease **30.3%** compared to Nov-2024

↗ **53.6 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **2.12 bil. USD**, **86.9%** of total 2024

VOLUME

152.1 ths. tons

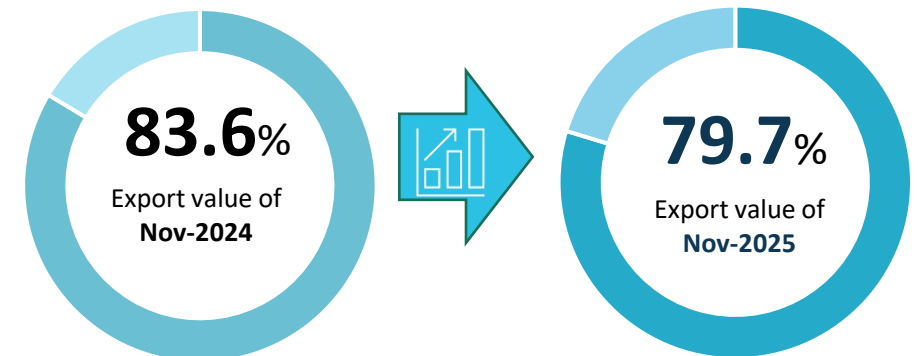
↗ Increase **7.7%** compared to Oct-2025

↘ Decrease **21.4%** compared to Nov-2024

↗ **31.4 ths. Tons** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **1.22 mil. tons**, **84.4%** of total 2024

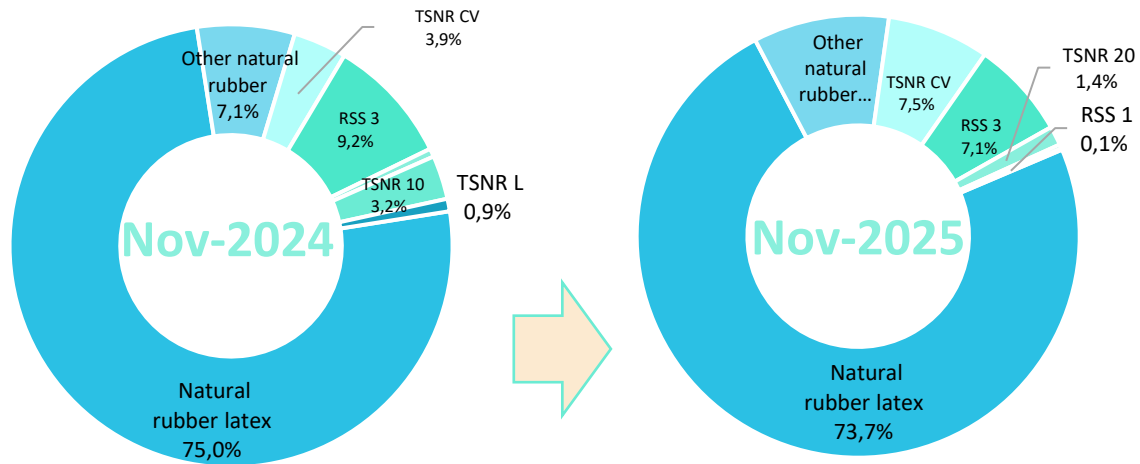
Changes in percentage of export value to China, Nov-2025





RUBBER

Structure of exports by products to China, Nov-2025



Export results to China, Nov-2025



Natural rubber latex

Value: **109.8** mil. USD

Decrease **19.8%** compared to Oct-2025

Decrease **60.3%** compared to Nov-2024



RSS 3

Value: **21.4** mil. USD

Decrease **15.7%** compared to Oct-2025

Decrease **37.3%** compared to Nov-2024



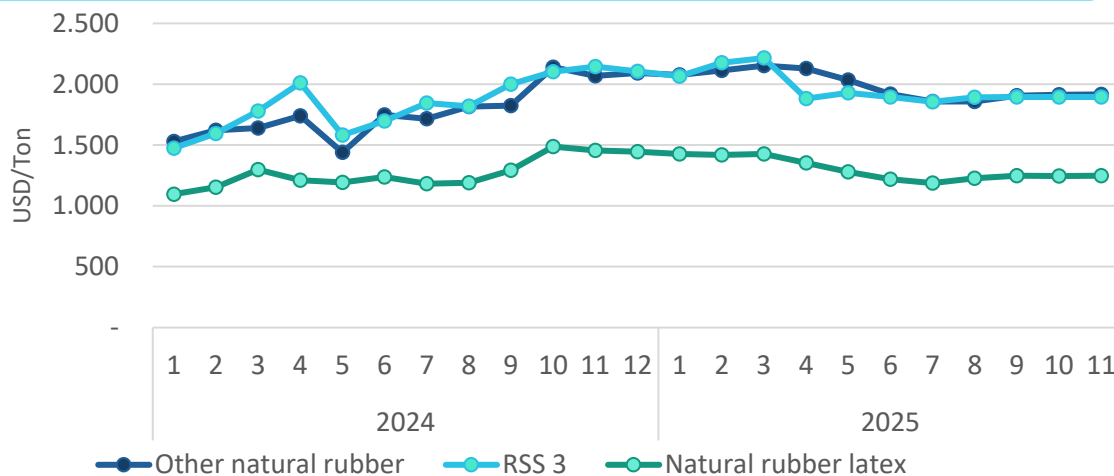
Other natural rubber

Value: **21.6** mil. USD

Decrease **4.7%** compared to Oct-2025

Decrease **17.7%** compared to Nov-2024

Average export price to China, Nov-2025



Natural rubber latex

The average export price in Nov-2025 is **1,248** USD/ton; **increase 0.3%** compared to the previous month; and **decrease 14.2%** compared to the same month of 2024

RSS 3

The average export price in Nov-2025 is **1,896** USD/ton; **increase 0.1%** compared to the previous month; and **decrease 11.6%** compared to the same month of 2024

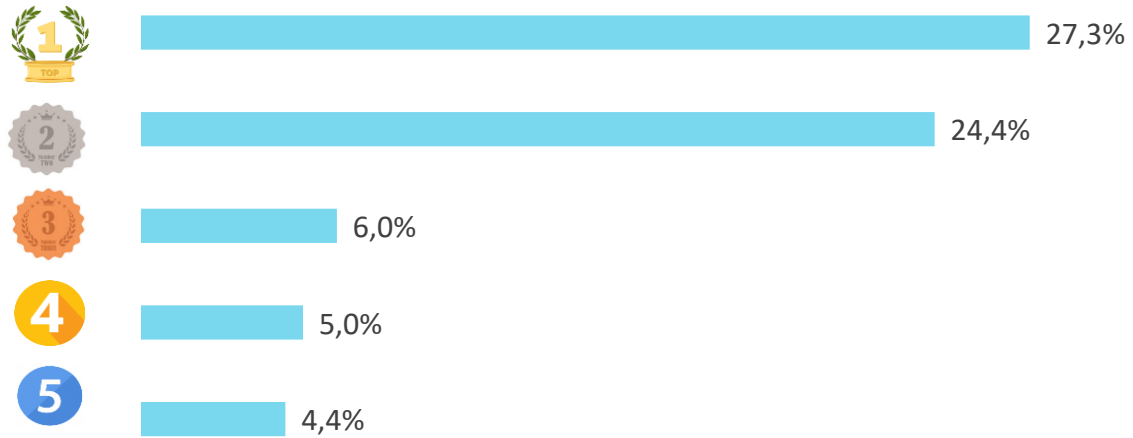
Other natural rubber

The average export price in Nov-2025 is **1,915** USD/ton; **increase 0.1%** compared to the previous month; and **decrease 7.4%** compared to the same month of 2024

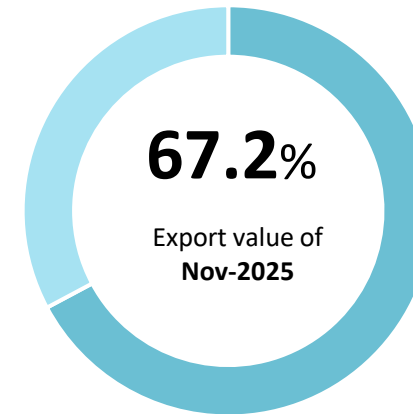


RUBBER

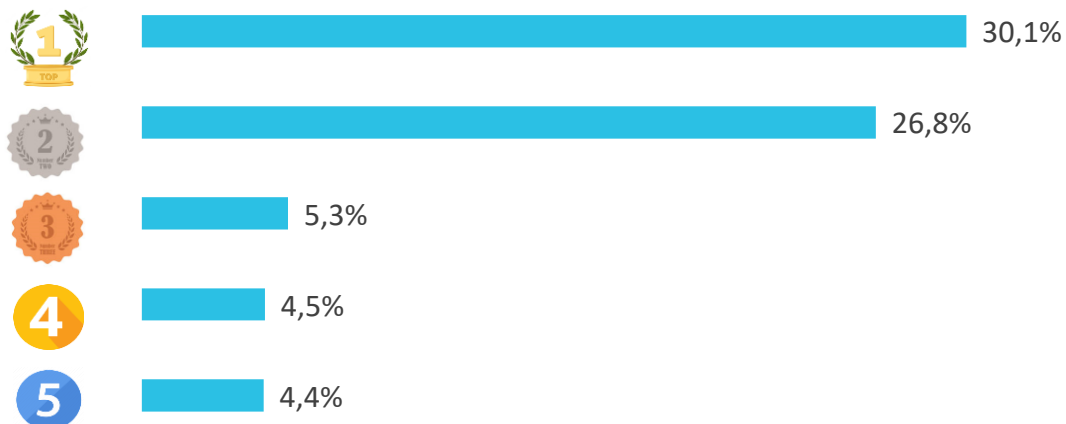
TOP 5 export enterprises by value to China, Nov-2025



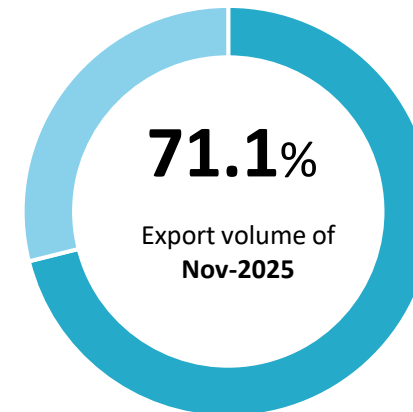
Value ratio of TOP 5 export enterprises to China, Nov-2025



TOP 5 export enterprises by volume to China, Nov-2025



Volume ratio of TOP 5 export enterprises to China, Nov-2025





RUBBER

SPOTLIGHTS

❖ Vietnam's Rubber Exports to China Decline Sharply Compared with 2024

In November 2025, Vietnam exported 152,067 tonnes of rubber to China, with export value of USD 257.14 million, up 7.7% in volume and 7.9% in value compared with the previous month. However, compared with November 2024, exports experienced a significant decline, down 30.3% in value and 24.4% in volume year-on-year.

The main reason is the weakening of China's automotive industry, which is the largest consumer of rubber. Passenger car sales in November 2025 fell 8.5% year-on-year, marking the second consecutive month of decline (according to CPCA). At the same time, competition from alternative suppliers has intensified. Thailand continues to hold the number-one position in the Chinese market with more than one-third of total market share; Indonesia promotes exports thanks to supportive policies and a stable exchange rate; while African rubber, particularly from Côte d'Ivoire, has emerged as a strong competitor due to lower costs and increased imports by China.

To maintain and boost rubber exports, Vietnam needs to improve product quality, diversify export markets, and enhance value addition for rubber products. Strategies such as market risk diversification, deeper investment, and stronger international cooperation should be implemented in a coordinated manner. With the right approach, Vietnam's rubber industry can mitigate the impact of external shocks, capitalize on opportunities when demand recovers, and strengthen its position in the global rubber market in the coming years.

Source: Vneconomy.vn





RUBBER

SPOTLIGHTS

❖ Impact of Hainan's New Customs Policy on the Natural Rubber Market

From December 18, 2025, the Hainan Free Trade Port (FTP) officially entered the “customs closure” phase in preparation for the implementation of a series of new trade policies by China. These include a list of taxable goods, import duty exemptions for products with a value-added content of 30% or more, and a stricter customs supervision mechanism. This move is part of China's long-term plan to transform Hainan into an international trade hub.

Hainan is currently China's second-largest natural rubber-producing region, accounting for about 47% of the country's rubber plantation area, with annual output of approximately 250,000–350,000 tonnes. However, local consumption is very low (less than 10% nationwide) due to the lack of tire manufacturing plants and a limited number of rubber-processing enterprises.

Under the new mechanism, natural rubber latex imported into the Hainan FTP is still subject to normal import duties. However, if it is processed locally and has value-added growth of more than 30%, it will be exempt from import duties when entering China's domestic market (though VAT and consumption taxes still apply). Several enterprises in Hainan moved quickly to take advantage of this incentive. Nevertheless, domestic rubber latex prices in Hainan currently range from USD 1,480–1,520 per tonne, which is higher than imported rubber from Thailand (USD 1,330–1,340 per tonne) and Vietnam (USD 1,230–1,260 per tonne). As a result, companies tend to favor imported raw materials, placing downward pressure on the consumption of domestically produced rubber in Hainan.

Source: china.com





WOOD & WOODEN PRODUCTS

Export volume and value to China, Nov-2025



Export results to China, Nov-2025

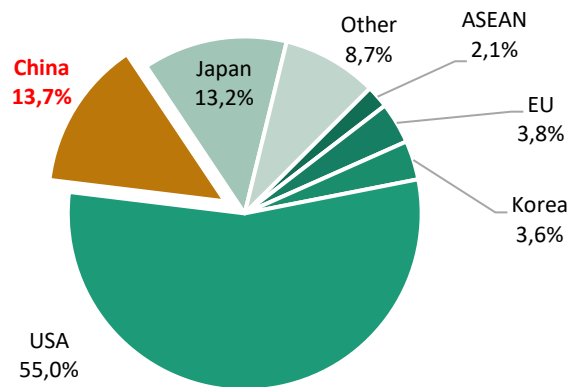
VALUE

203

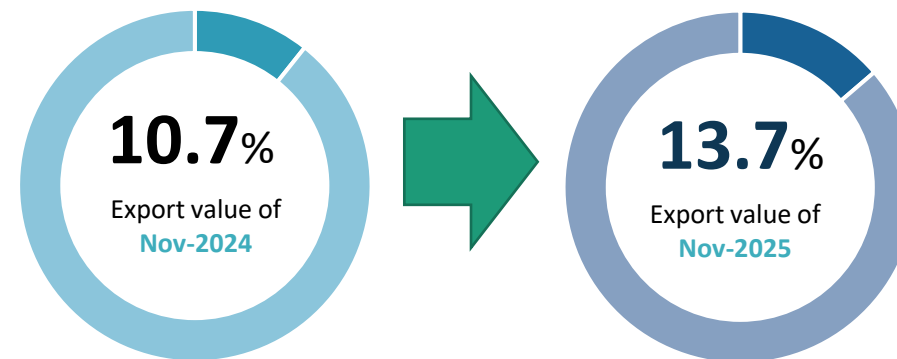
mil. USD

- ➔ Increase **1.7%** compared to Oct-2025
- ➔ Increase **2.2%** compared to Nov-2024
- ➔ **34.9 mil. USD** more than the monthly average rate in 2024
- ❖ Accumulated 11 months of 2025 reaches **1.8 bil. USD**, **89.7%** of total 2024

Percentage of export value to China, Nov-2025



Changes in percentage of export value to China, Nov-2025

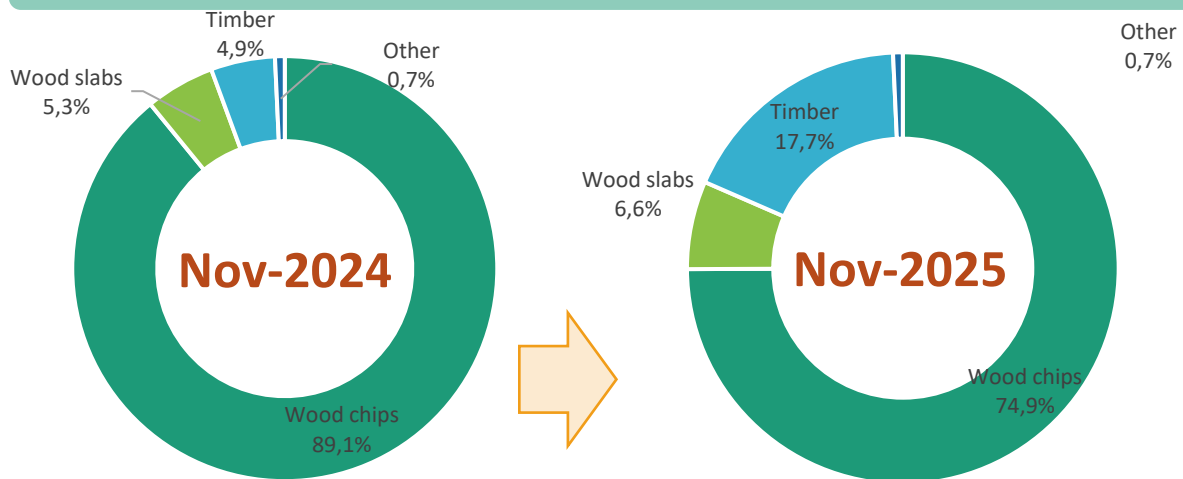


Source: Calculated from data of the Department of Customs



WOOD & WOODEN PRODUCTS

Structure of exports by products to China, Nov-2025



Export results to China, Nov-2025



Wood chips

Value: **160.6** mil. USD
 Increase **19%** compared to Oct-2025
 Increase **18%** compared to Nov-2024



Timber

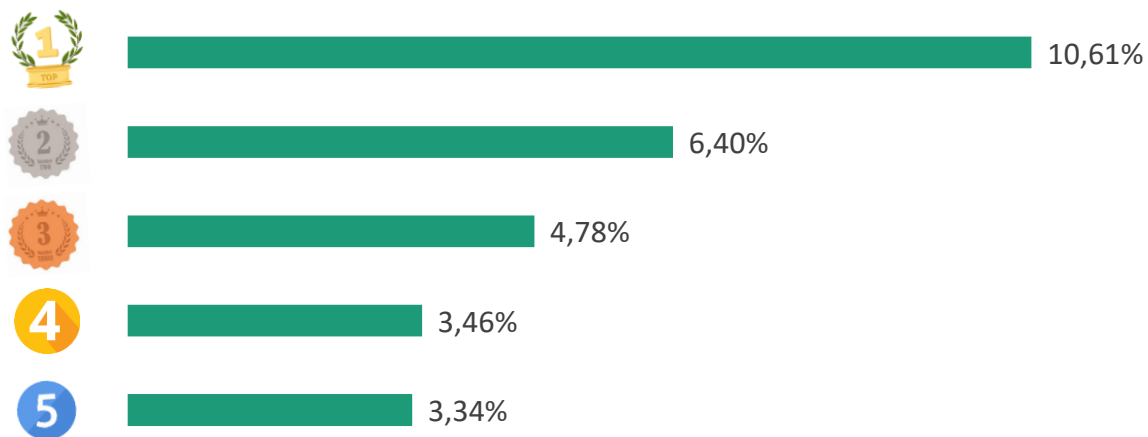
Value: **38** mil. USD
 Increase **8%** compared to Oct-2025
 Increase **409%** compared to Nov-2024



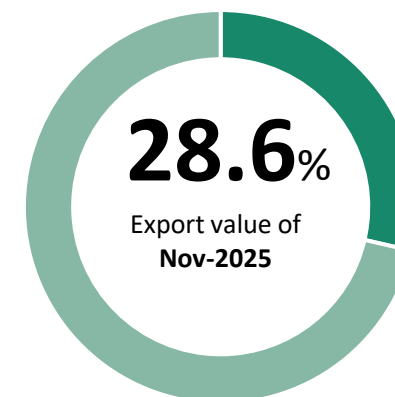
Wood slabs

Value: **14.1** mil. USD
 Increase **48%** compared to Oct-2025
 Increase **75%** compared to Nov-2024

TOP 5 export enterprises by value to China, Nov-2025



Value ratio of TOP 5 export enterprises to China, Nov-2025





SPOTLIGHTS



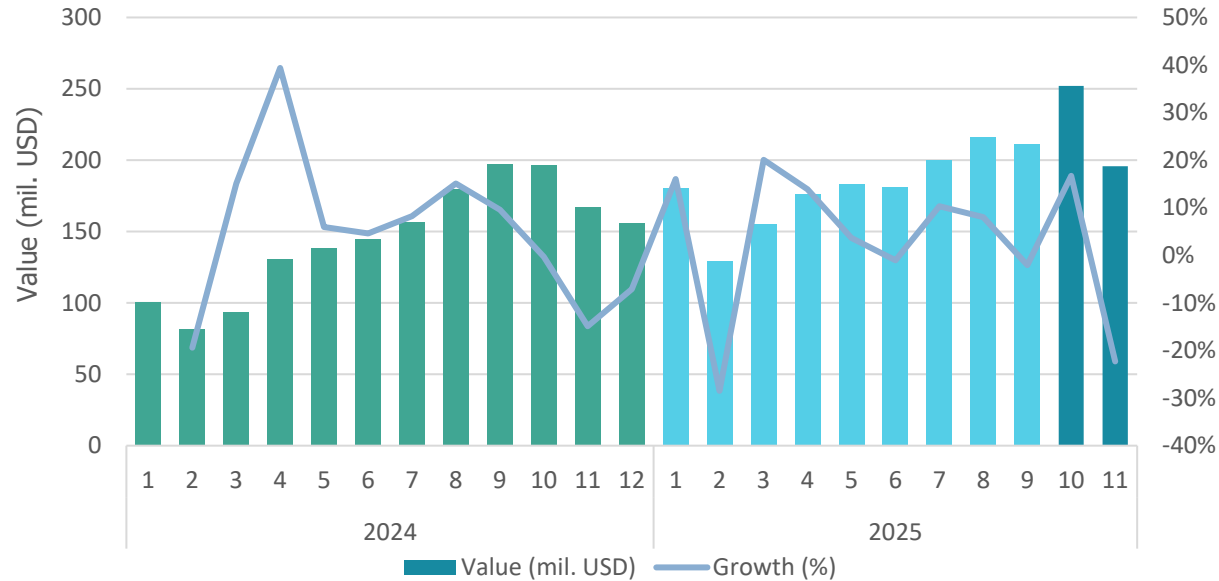
After several months of decline, China's timber import showed signs of recovery in November 2025. According to customs data, total imports of logs and sawn timber reached 4.707 million cubic meters, up 12.3% month-on-month and 0.5% year-on-year compared with November 2024. Notably, log imports surged by 27.4% from the previous month. However, for the first 11 months of the year as a whole, total timber imports still recorded double-digit declines in both volume (down 11.2%) and value (down 14.2%), indicating that the overall trend for the year remained weak.

The recovery in November was also accompanied by significant shifts in the structure of supplying countries. Most notably, timber exports from the Republic of the Congo to China nearly doubled year-on-year, while Canada posted its strongest growth of the year, up 30.4%. In contrast, imports from the United States continued to plunge, falling by 64.2%. In terms of product types, coniferous (softwood) timber continued to account for the largest share and saw a renewed increase in November. However, while the average price of softwood logs declined, the average price of softwood sawn timber rose for the fifth consecutive month.



FISHERIES

Export volume and value to China, Nov-2025



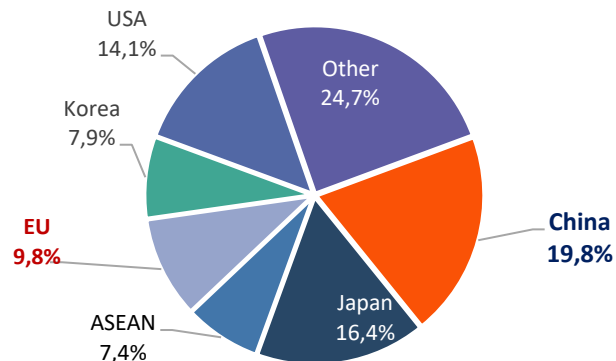
Export results to China, Nov-2025

VALUE

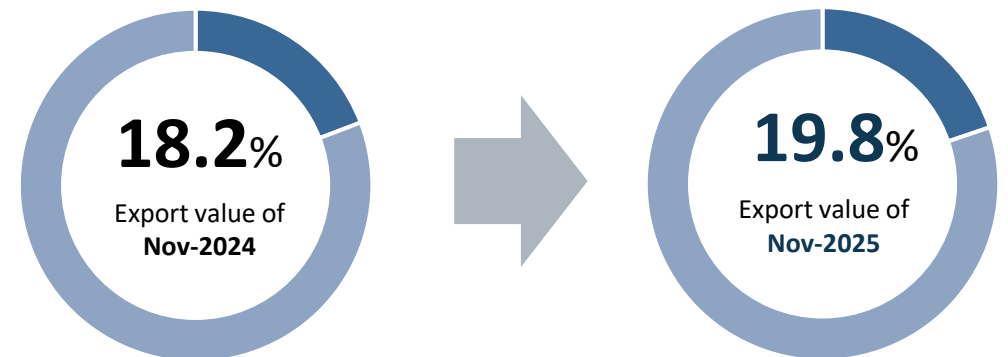
195.9 *mil. USD*

↘ **Decrease 22.3%** compared to Oct-2025
↗ **Increase 17.0%** compared to Nov-2024
▲ **50.7** mil. USD more than the monthly average rate in 2024
❖ Accumulated 11 months of 2025 reaches **2080.1** mil. USD, **119.4%** of total 2024

Percentage of export value to China, Nov-2025



Changes in percentage of export value to China, Nov-2025

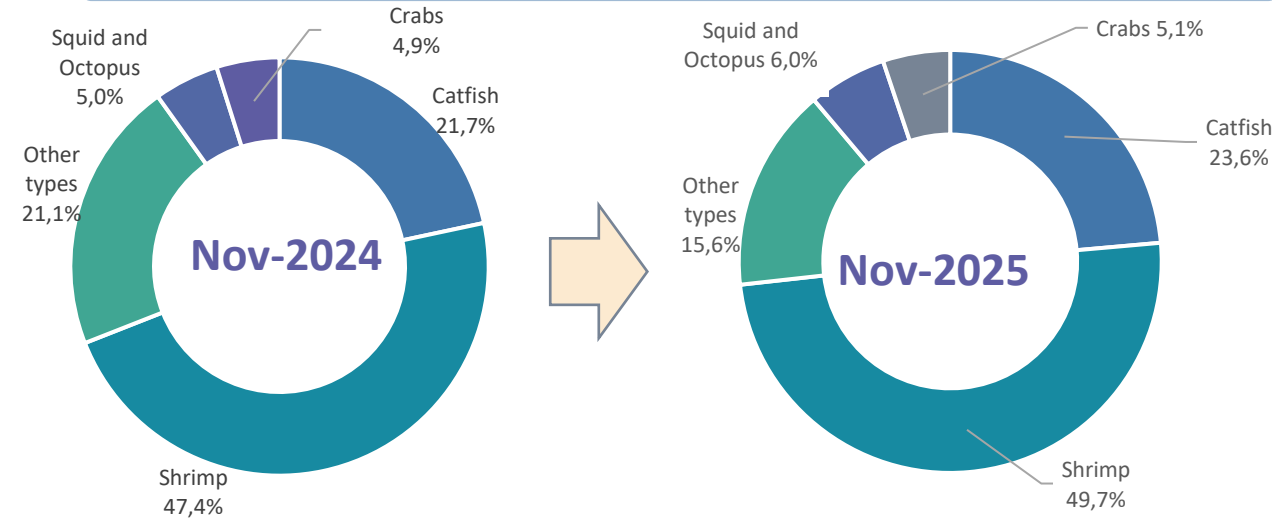


Source: Calculated from data of the Department of Customs

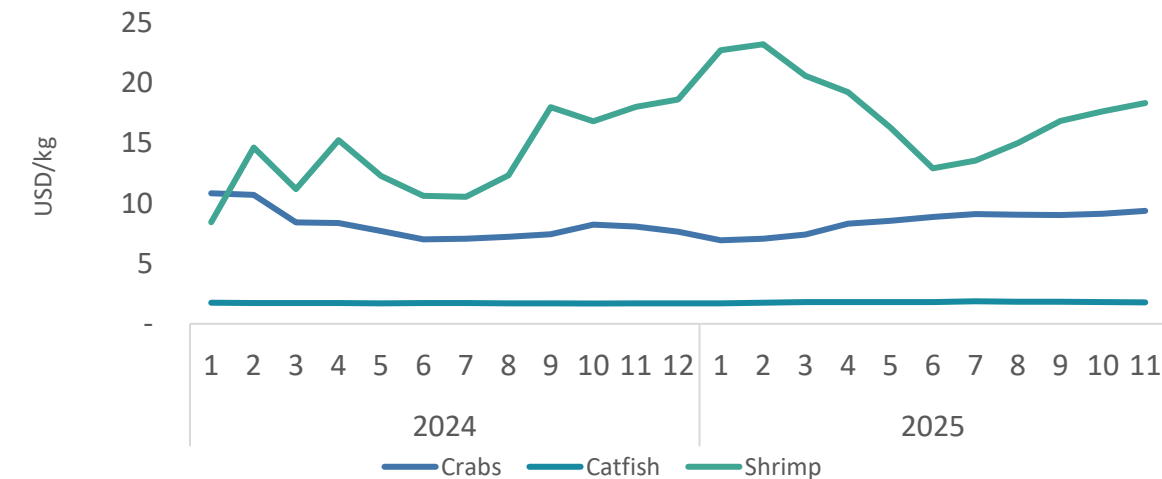


FISHERIES

Structure of exports by products to China, Nov-2025



Average export seafood price to China, Nov-2025



Seafood exports to China, Nov-2025



Catfish

Value: **46.2** mil. USD
 Decrease **18.8%** compared to Oct-2025
 Increase **27.4%** compared to Nov-2024



Shrimp

Value: **97.3** mil. USD
 Decrease **21.9%** compared to Oct-2025
 Increase **22.6%** compared to Nov-2024



Crabs

Value: **10.1** mil. USD
 Decrease **20.8%** compared to Oct-2025
 Increase **23.7%** compared to Nov-2024

Crabs

The average export price in Nov-2025 is **9.4 USD/kg**; **increase 2.6%** compared to the previous month; and **increase 16.0%** compared to the same month of 2024

Catfish

The average export price in Nov-2025 is **1.8 USD/kg**; **decrease 1.4%** compared to the previous month; and **increase 4.9%** compared to the same month of 2024

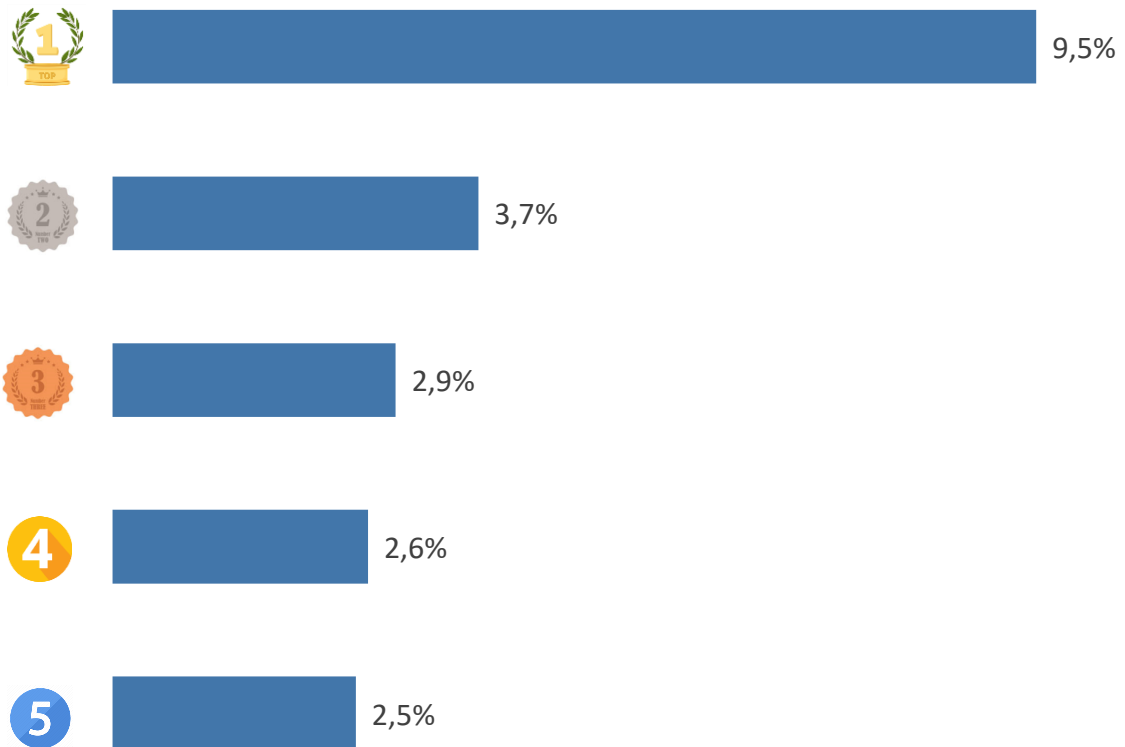
Shrimp

The average export price in Nov-2025 is **18.3 USD/kg**; **increase 3.9%** compared to the previous month; and **increase 1.7%** compared to the same month of 2024

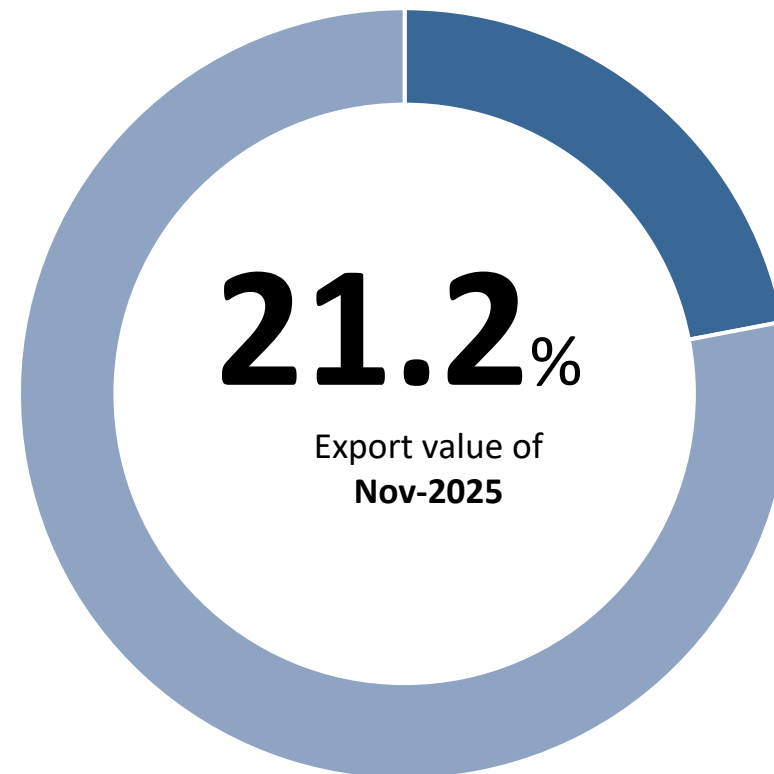


FISHERIES

TOP 5 export enterprises by value to China, Nov-2025



Value ratio of TOP 5 export enterprises to China, Nov-2025



China increases to import shrimp

By the end of October 2025, China imported approximately USD 4.3 billion of shrimp, up 10% year-on-year, while domestic production increased by only 1%. Ecuador remained the largest supplier; although its export volume to China declined slightly by 1%, export value rose by 9%. India and Thailand also recorded increases in export value of 16% and 14%, respectively, with shipments largely concentrated in September–October, when China boosted imports to meet demand for the festive season and Lunar New Year.

Vietnam's shrimp exports to China and Hong Kong continued to increase. As of November 15, 2025, export value reached approximately USD 1.2 billion, up 60%, further strengthening Vietnam's position among China's leading shrimp suppliers. In addition to lobster, which accounts for a large share, black tiger shrimp stands out as Vietnam's key advantage in this market thanks to its premium positioning, suitability for the hotel–restaurant (HORECA) channel, and its ability to meet strict requirements for quality and uniform size.

The significant increase in import value, while volumes increased only marginally, indicates that Chinese consumers are willing to pay for higher-end and more convenient processed products. This creates great opportunities for high-quality black tiger shrimp, deep-processed shrimp products, and branded, packaged shrimp from Vietnam.

To fully capitalize on opportunities in the Chinese market amid intensifying competition, enterprises should prioritize high-quality frozen black tiger shrimp products, proactively plan production, procurement, and cold storage to ensure a stable supply of white-leg shrimp for this market, and closely monitor new regulations and standards. In addition, building robust quality management systems, along with complete documentation for farming areas and processing facilities, will help ensure smooth customs clearance, reduce the risk of additional costs, and avoid shipment delays.

Source: Vasep





CASHEW NUTS

Export value and volume to China, Nov-2025



Export results to China, Nov-2025

VALUE
114.3 mil. USD

↗ Increase **1.3%** compared to Oct-2025

↗ Increase **19.7%** compared to Nov-2024

↑ **52.2** mil. USD more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **1.0 bil. USD, 138%** of total 2024

VOLUME
16.8 ths. tons

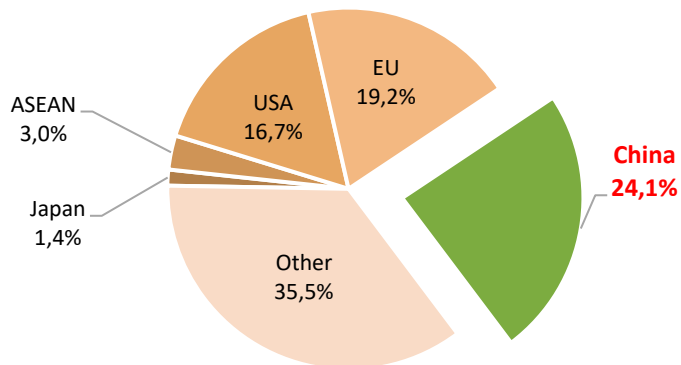
↘ Decrease **0.2%** compared to Oct-2025

↗ Increase **17.8%** compared to Nov-2024

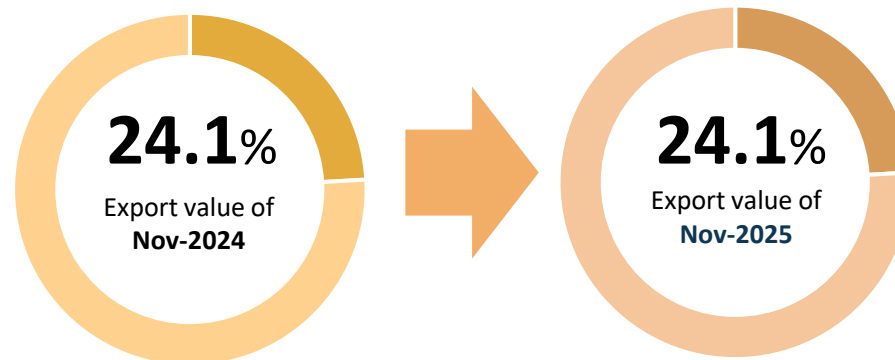
↑ **6.3** ths. tons more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **159 ths. tons, 127%** of total 2024

Changes in percentage of export value to China, Nov-2025



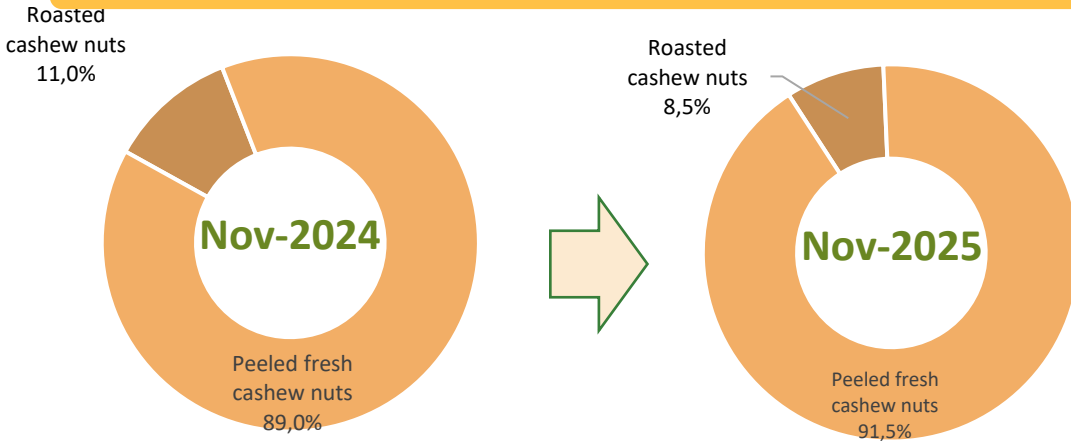
Changes in percentage of export value to China, Nov-2023





CASHEW NUTS

Structure of exports by products to China, Nov-2025



Export results to China, Nov-2025



Peeled fresh cashew nuts

Value: **104.6** mil. USD

Decrease **3.0%** compared to Oct-2025

Increase **1.3%** compared to Nov-2024



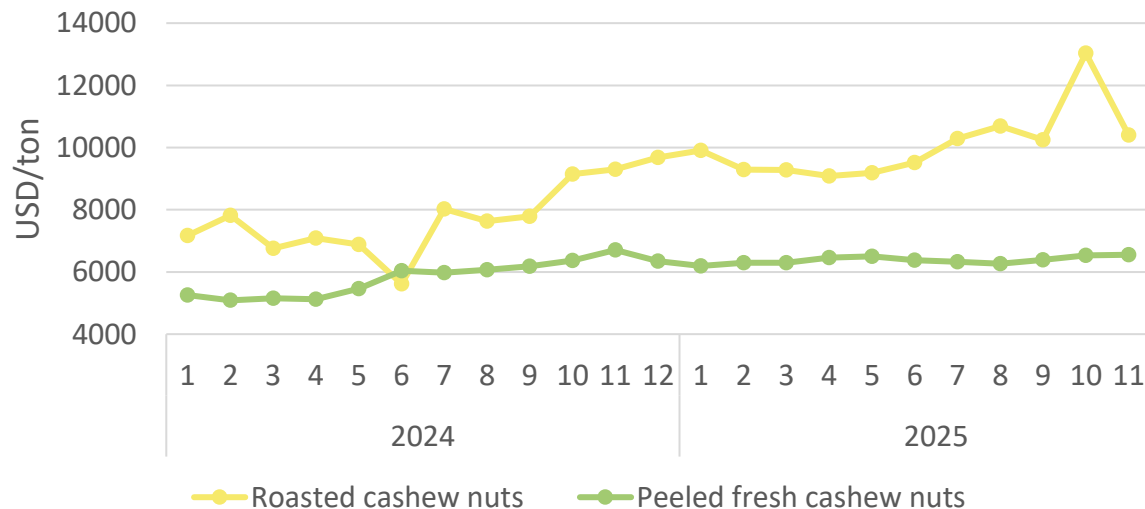
Roasted cashew nuts

Value: **9.7** mil. USD

Increase **102%** compared to Oct-2025

Decrease **8.0%** compared to Nov-2024

Average export cashew nuts price to China, Nov-2025



Peeled fresh cashew nuts

The average export price in Nov-2025 is **6.558** USD/ton; **increase 0.5%** compared to the previous month; and **decrease 2.2%** compared to the same month of 2024

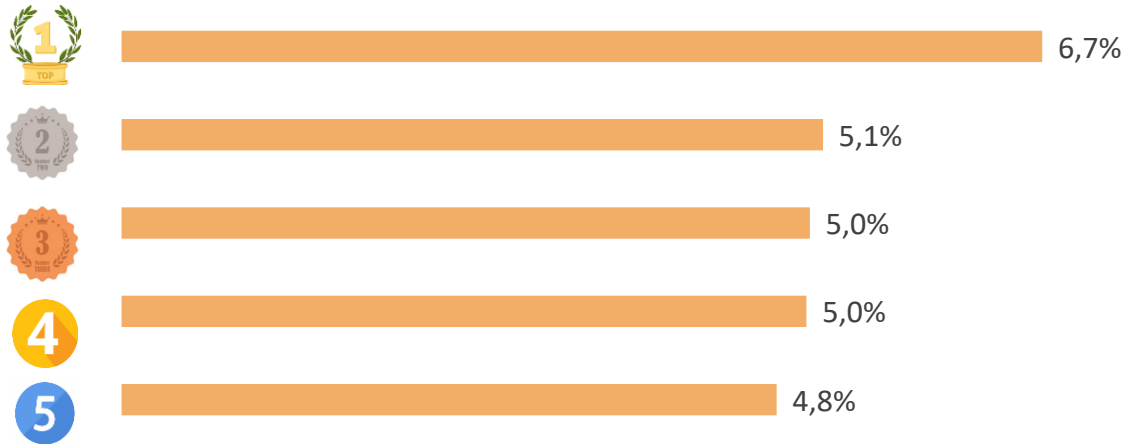
Roasted cashew nuts

The average export price in Nov-2025 is **10.052** USD/ton; **decrease 20.2%** compared to the previous month; and **increase 11.9%** compared to the same month of 2024

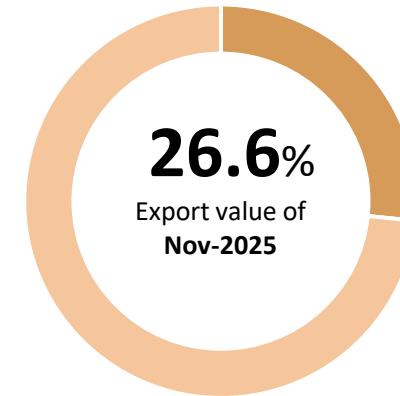


CASHEW NUTS

TOP 5 export enterprises by value to China, Nov-2025



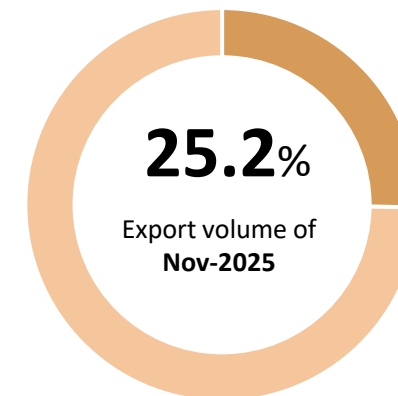
Value ratio of TOP 5 export enterprises to China, Nov-2025



TOP 5 export enterprises by volume to China, Nov-2025



Volume ratio of TOP 5 export enterprises to China, Nov-2025





China emerges as the fastest-growing market for Vietnamese cashews in 2025

In the context of complex global trade conditions driven by trade tensions, price volatility, and adjustments in tariff policies, China is emerging as a key market driver of the Vietnam's cashew exports. In November 2025, Vietnam's cashew exports to China reached USD 114.3 million, with a volume of 16.8 thousand tonnes. Compared with the same period in 2024, this represented a sharp increase of 19.7% in value and 17.8% in volume. With these results, China continued to become the Vietnam's largest cashew import market, accounting for 24.1% of total export value.

The main growth drivers are changes in the price balance among different nuts in the Chinese market. The imposition of reciprocal tariffs has significantly increased the prices of products such as almonds, walnuts, and pecans imported from the United States, forcing Chinese importers and distributors to seek more cost-effective alternative suppliers. In this context, Vietnamese cashews, with advantages in price competitiveness, geographic proximity, and an established position in the regional supply chain, have rapidly gained market share.

In the medium term, demand for cashews in China is assessed to have substantial growth potential, supported by its large population, the rapid expansion of the middle class, and a growing preference for nutritious, health-oriented foods. However, the strong growth partly driven by tariff policy fluctuations among major economies also raises concerns about sustainability. This underscores the need for Vietnam's cashew industry not only to capitalize on short-term opportunities, but also to enhance product quality, diversify export markets, and further develop processing capabilities in order to strengthen its long-term competitive advantage.





RICE

Export volume and value to China, Nov-2025



Export results to China, Nov-2025

VALUE
27.4 mil. USD



↗ Increase **88.0%** compared to Oct-2025

↗ Increase **406.5%** compared to Nov-2024

↑ **13.4 mil. USD** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **364.6 mil. USD, 206.3%** of total 2024

VOLUME
57.0 ths. tons



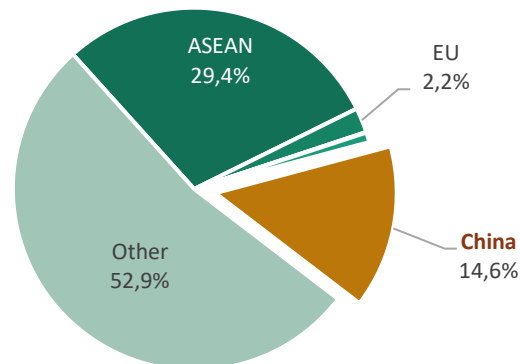
↗ Increase **92.7%** compared to Oct-2025

↗ Increase **548.9%** compared to Nov-2024

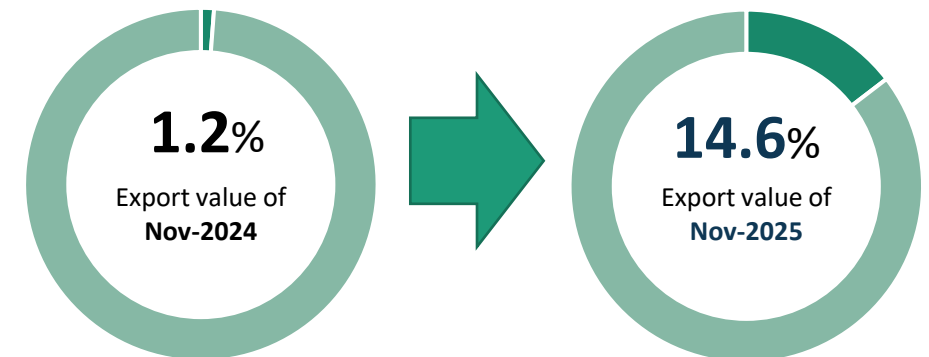
↑ **33.2 ths. tons** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **686.8 ths. tons, 240.6%** of total 2024

Percentage of export value to China, Nov-2025



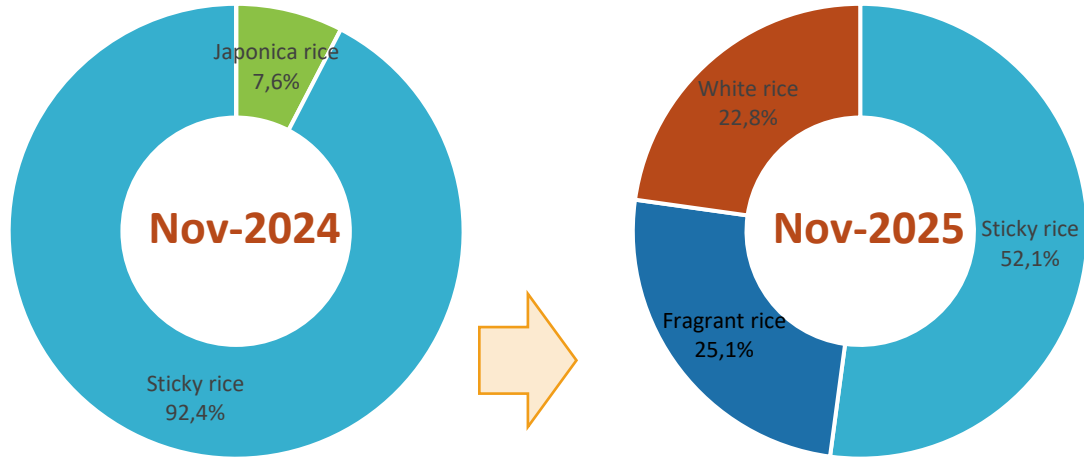
Changes in percentage of export value to China, Nov-2025



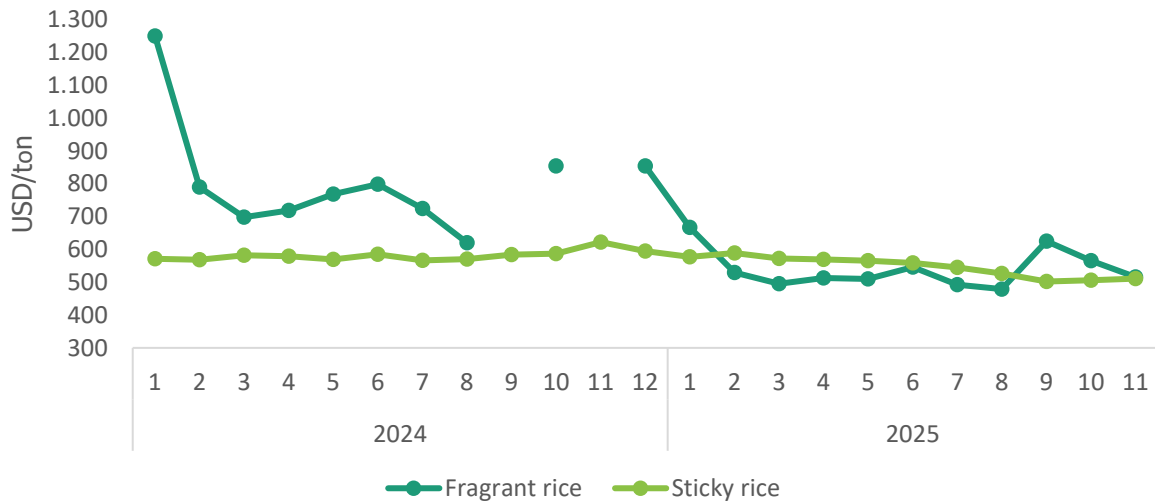


RICE

Structure of exports by products to China, Nov-2025



Average export rice price to China, Nov-2025



Export results to China, Nov-2025



Sticky rice

Value: **14.4** mil. USD

Increase **54%** compared to Oct-2025

Increase **190%** compared to Nov-2024



Fragrant rice

Value: **7.0** mil. USD

Increase **123%** compared to Oct-2025

N/A compared to Nov-2024



White rice

Value: **6.3** mil. USD

Increase **232%** compared to Oct-2025

N/A compared to Nov-2024

Sticky rice

The average export price in Nov-2025 is **511** USD/ton; **increase 1%** compared to the previous month; and **decrease 18%** compared to the same month of 2024

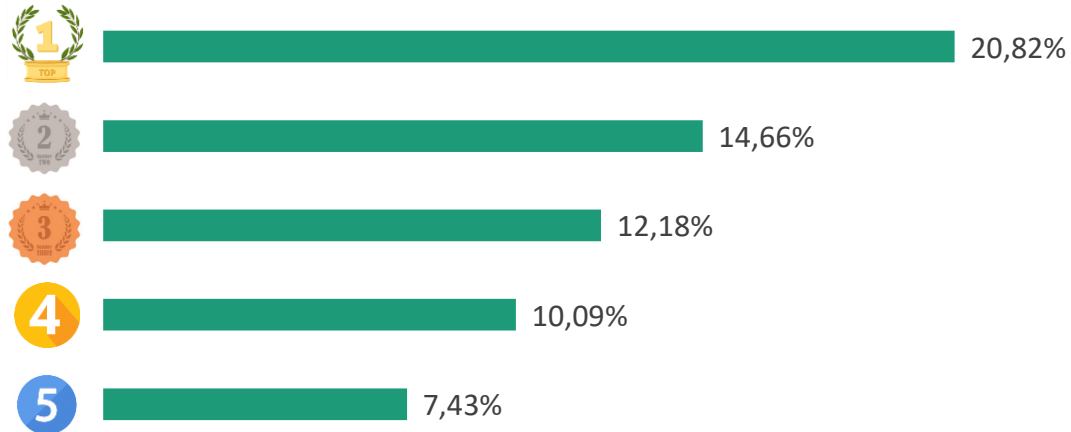
Fragrant rice

The average export price in Nov-2025 is **516** USD/ton; **decrease 9%** compared to the previous month.

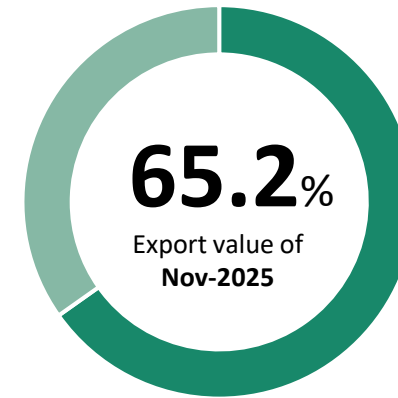


RICE

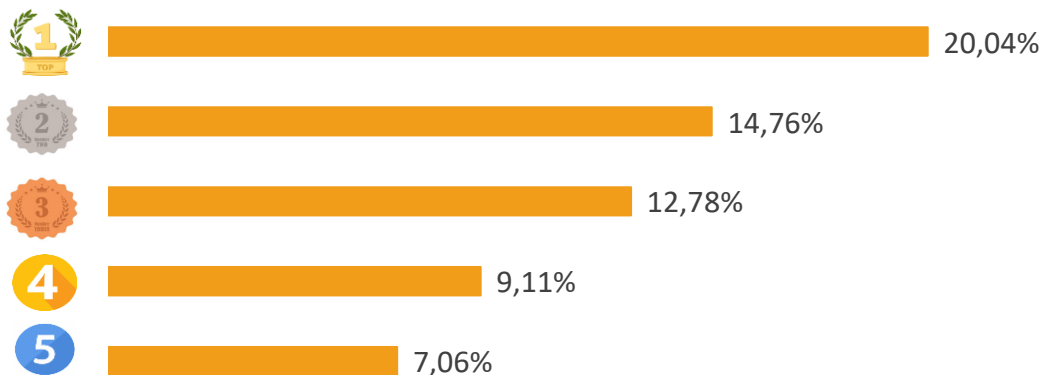
TOP 5 export enterprises by value to China, Nov-2025



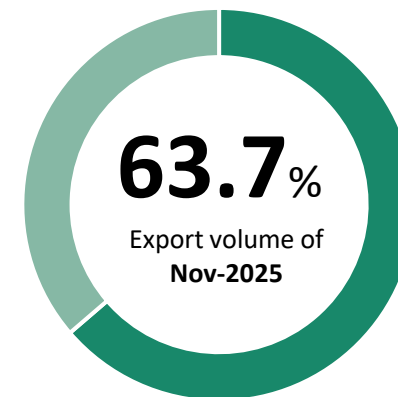
Value ratio of TOP 5 export enterprises to China, Nov-2025



TOP 5 export enterprises by volume to China, Nov-2025



Volume ratio of TOP 5 export enterprises to China, Nov-2025





RICE



SPOTLIGHTS

The integrated rice–crab farming model is being widely replicated in Northeast China, delivering dual economic and environmental benefits. A notable example is Panjin City, where the model has been implemented across more than 100,000 hectares, yielding 1.03 million tonnes of rice and 72,000 tonnes of crabs.

The core principle of this model is to transform rice paddies into a functioning ecosystem, in which crabs act as natural biological control agents, helping to eliminate pests and weeds while enriching soil nutrients.

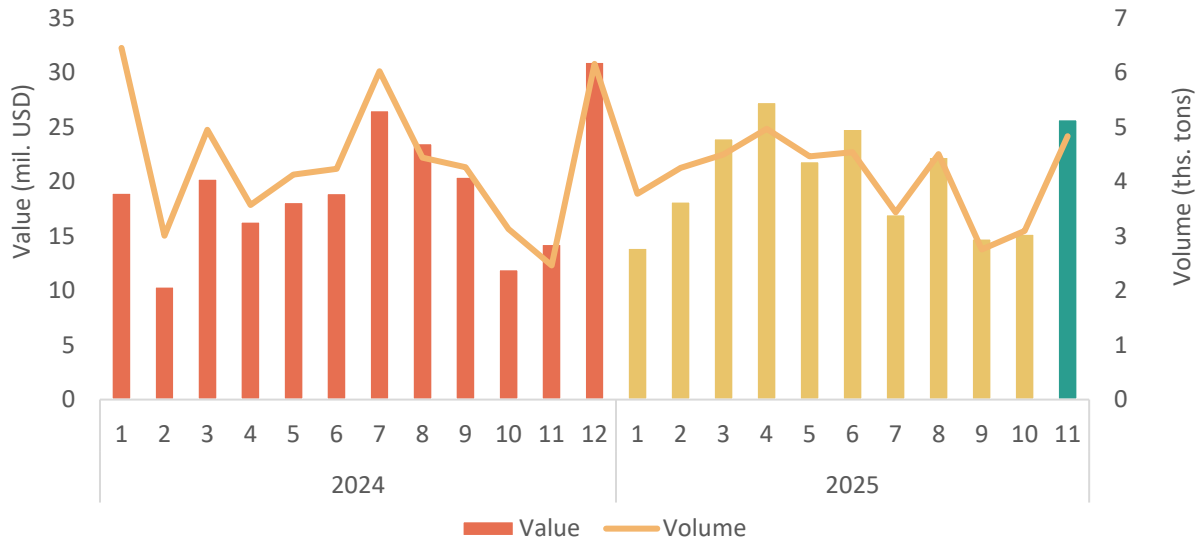
To operate the system, farmers construct small channels and trenches within the rice fields to provide shelter and movement pathways for the crabs. Once the rice plants are sufficiently established, crabs are released into the paddies. They feed on harmful organisms, stir and aerate the soil by burrowing, and their waste becomes a source of natural organic fertilizer.

The transition to this model began in the 1980s, and scientific studies have shown that the presence of crabs significantly reduces pest pressure while improving soil organic matter levels and microbial activity. This model not only helps farmers reduce input costs but also generates substantial additional income, contributing to the sustainable development of agriculture.



COFFEE

Export volume and value to China, Nov-2025



Export results to China, Nov-2025

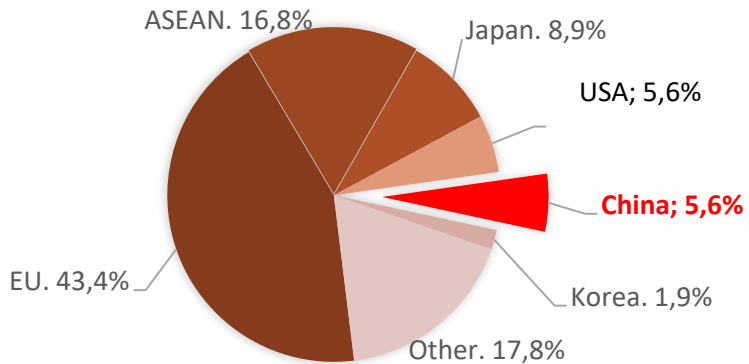
VALUE
25.7 mil. USD

- Increase **60.1%** compared to Oct-2025
- Increase **80%** compared to Nov-2024
- **6.5 mil. USD** more than the monthly average rate in 2024.
- ❖ Accumulated 11 months of 2025 reaches **224.9** mil. USD, **97.5%** of total 2024.

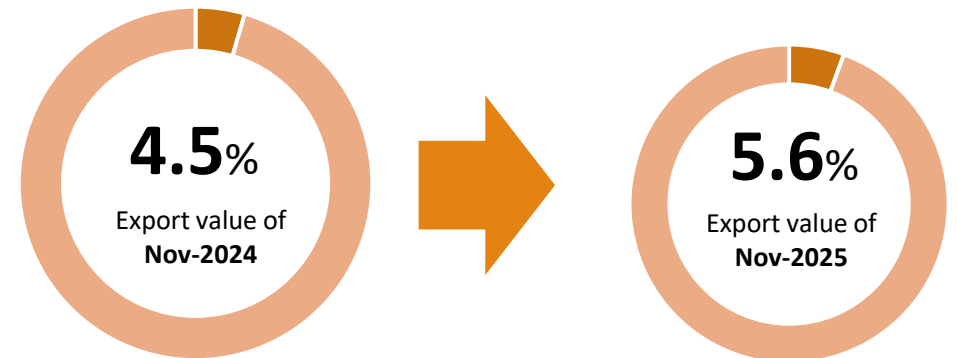
VOLUME
4.8 ths. tons

- Increase **56%** compared to Oct-2025
- Increase **96.3%** compared to Nov-2024
- **0.4 mil. USD** more than the monthly average rate in 2024.
- ❖ Accumulated 11 months of 2025 reaches **45.1** ths. tons, **85.4%** of total 2024.

Percentage of export value to China, Nov-2025



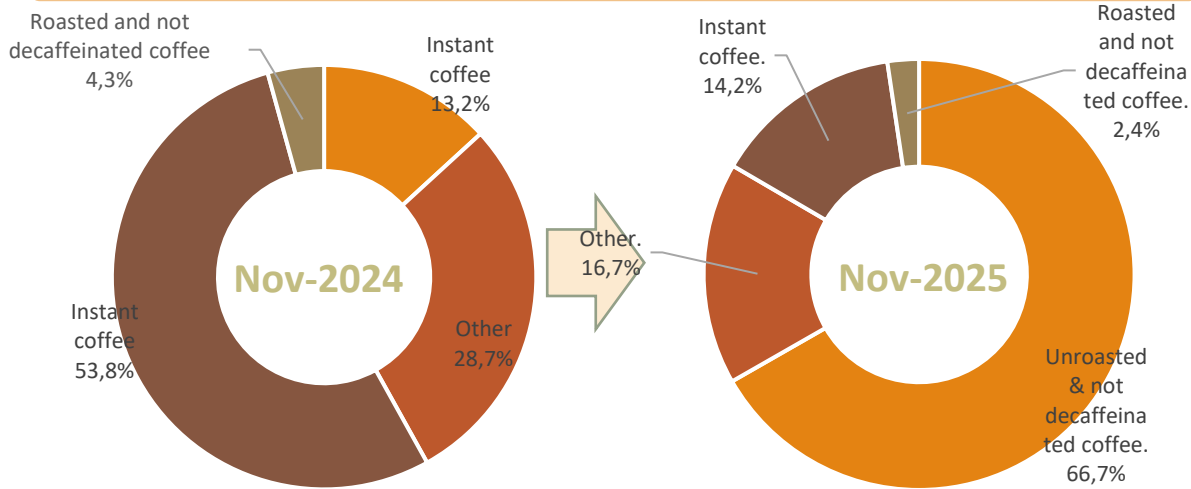
Changes in percentage of export value to China, Nov-2025





COFFEE

Structure of exports by products to China, Nov-2025



Export results to China, Nov-2025



Unroasted & not decaffeinated coffee

Value: **17.2** mil. USD
 Increase **83.4%** compared to Oct-2025
 Increase **813.7%** compared to Nov-2024



Instant coffee

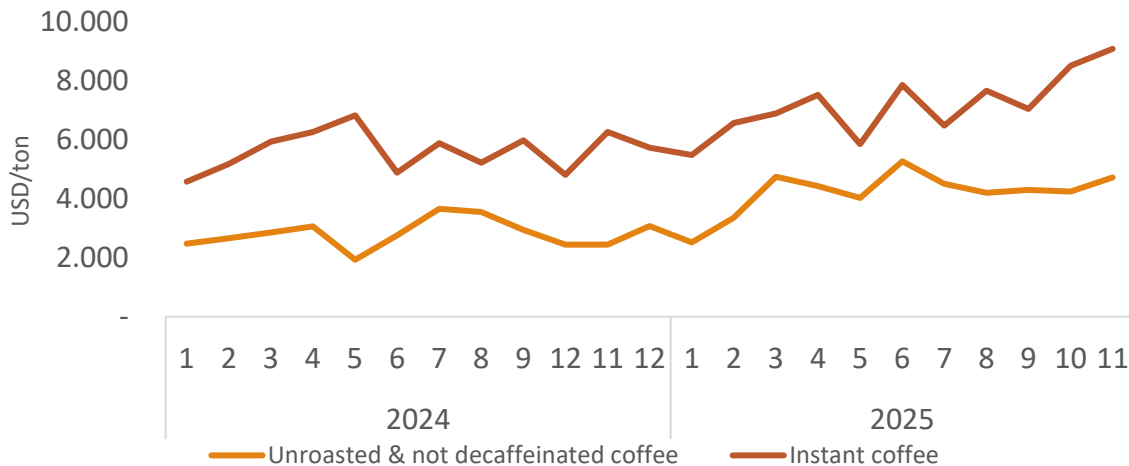
Value: **3.7** mil. USD
 Decrease **10%** compared to Oct-2025
 Decrease **52.2%** compared to Nov-2024



Roasted and not decaffeinated coffee

Value: **0.6** mil. USD
 Decrease **37.3%** compared to Oct-2025
 Decrease **0.5%** compared to Nov-2024

Average export price to China, Nov-2025



Instant coffee

The average export price in Nov-2025 is **9,094** USD/ton. **increase 6.8%** compared to the previous month; and **increase 44.9%** compared to the same month of 2024

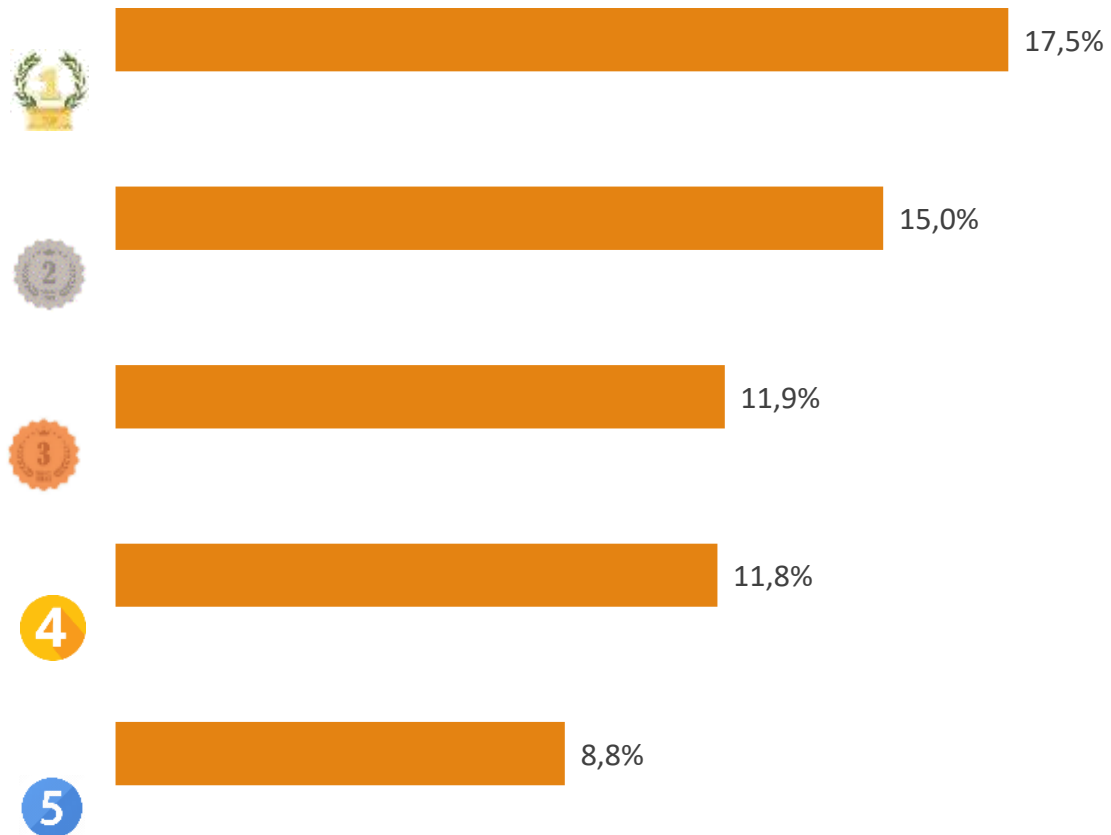
Unroasted & not decaffeinated coffee

The average export price in Nov-2025 is **4,723** USD/ton. **increase 11.1%** compared to the previous month; and **increase 92.8%** compared to the same month of 2024

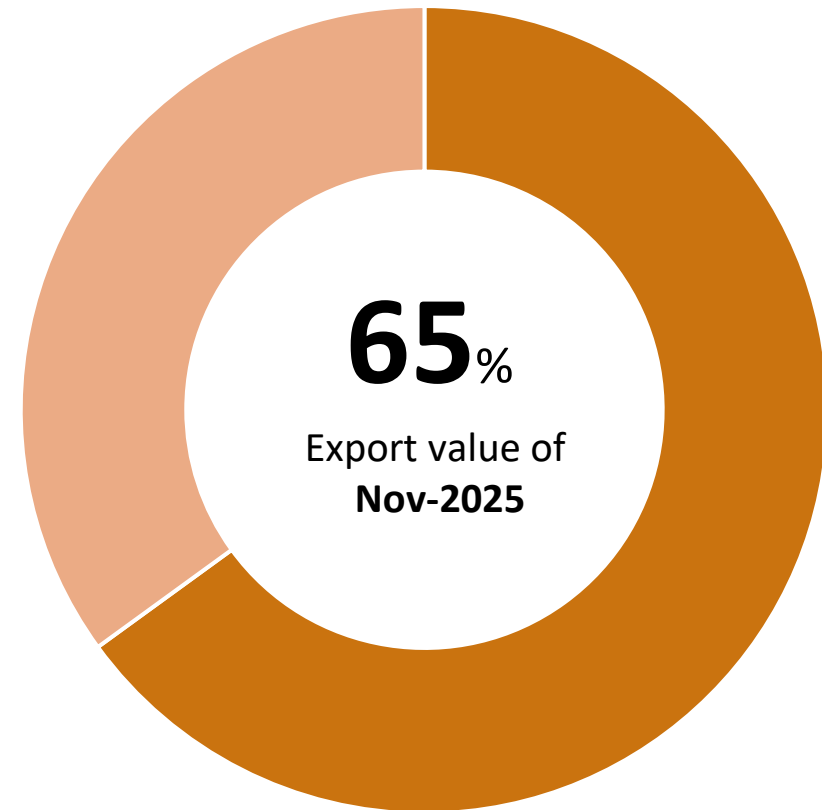


COFFEE

TOP 5 export enterprises by value to China, Nov-2025



Value ratio of TOP 5 export enterprises to China, Nov-2025





COFFEE

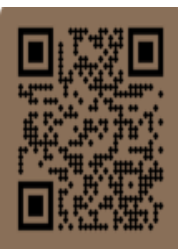
SPOTLIGHTS



Yunnan Province's coffee exports are leading in China in 2025, with export value of RMB 840 million (equivalent to USD 120 million) in the first 11 months of the year, according to data from Kunming Customs. This achievement is from Yunnan's natural advantages as China's key coffee-growing region, along with ongoing efforts to upgrade the value chain and increase product value.

Baoshan small-bean coffee is increasing its recognition in international markets thanks to its distinctive flavor, and has been exported to countries such as Vietnam, South Korea, Malaysia, and Singapore. At the same time, local enterprises have begun to diversify their product offerings and expand exports to Russia and the Middle East, highlighting the increasingly positive outlook for Yunnan coffee in the global market.

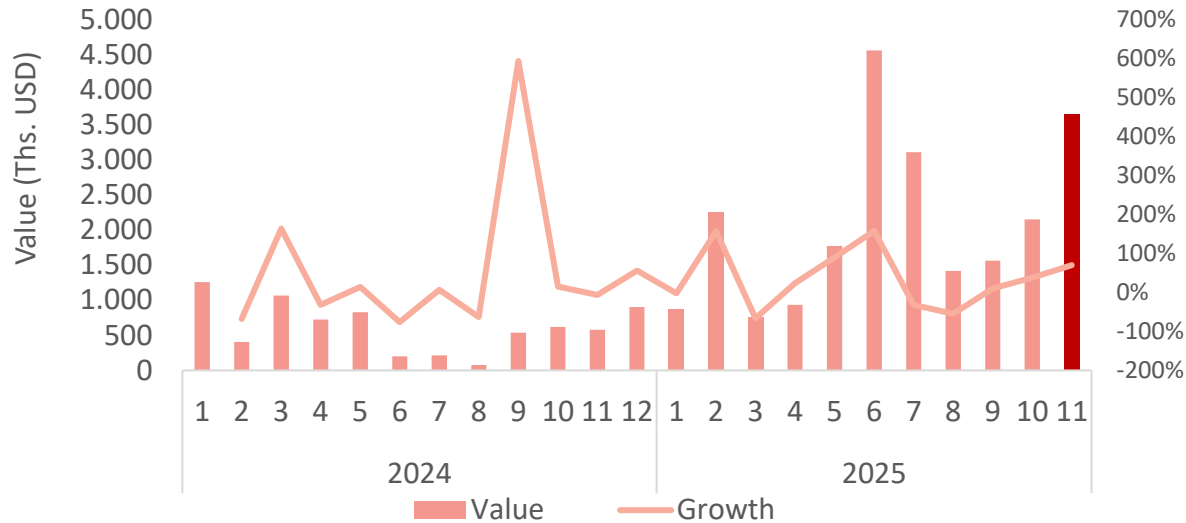
Source: chinadaily.com





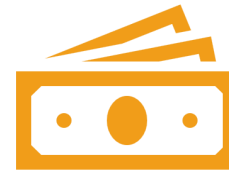
MEAT AND MEAT PRODUCTS (EXPORT)

Export value to China, Nov-2025



Export results to China, Nov-2025

VALUE



3.66
mil. USD

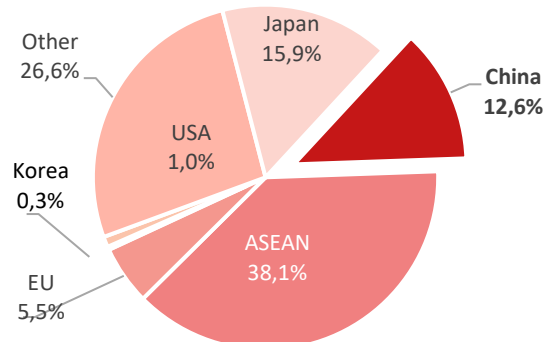
Increase **70%** compared to Oct-2025

Increase **532%** compared to Nov-2024

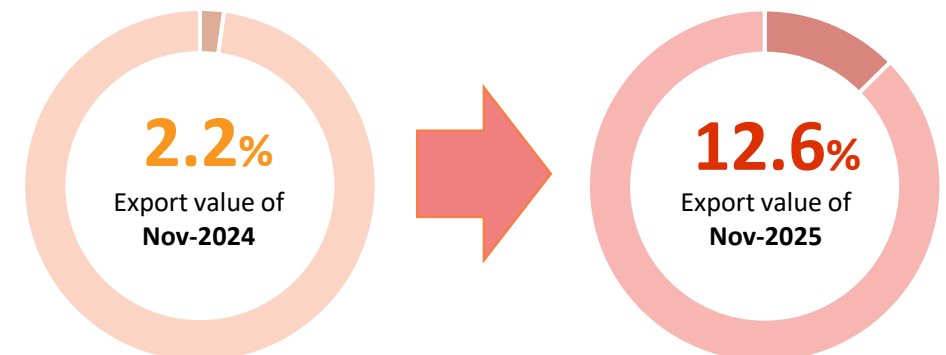
3.04 mil. USD more than the monthly average rate in 2024

◆ Accumulated 11 months of 2025 reaches **23.1 mil. USD, 311%** of total 2024

Percentage of export value to China, Nov-2025



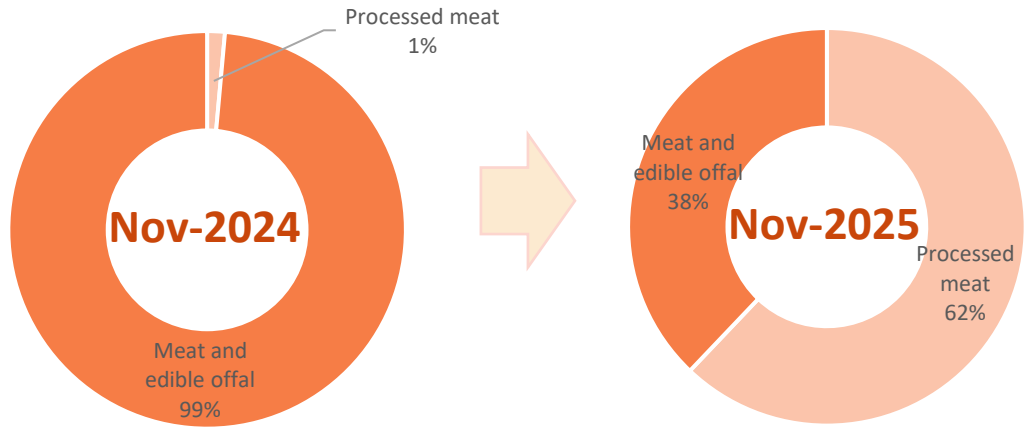
Changes in percentage of export value to China, Nov-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to China, Nov-2025



Export results to China, Nov-2025



Meat and edible offal

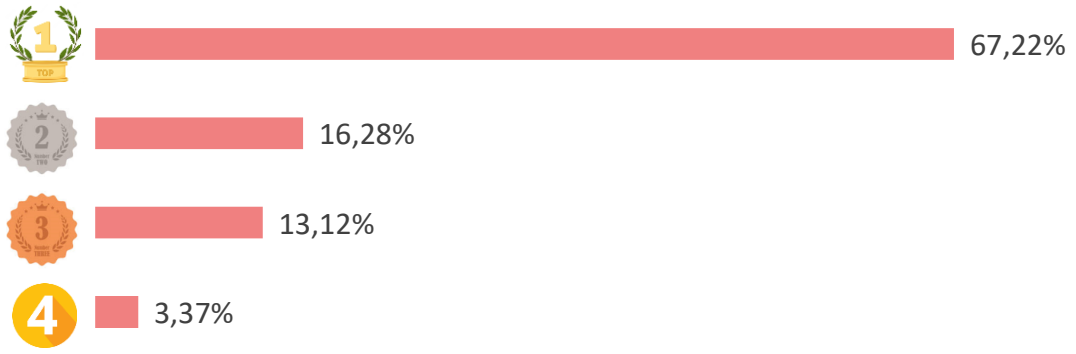
Value: **1.39** mil. USD
 Decrease **2%** compared to Oct-2025
 Increase **142%** compared to Nov-2024



Processed meat

Value: **2.3** mil. USD
 Increase **208%** compared to Oct-2025
 Increase **27.1 times** compared to Nov-2024

TOP 5 export enterprises by value to China, Nov-2025



Value ratio of TOP 5 export enterprises to China, Nov-2025

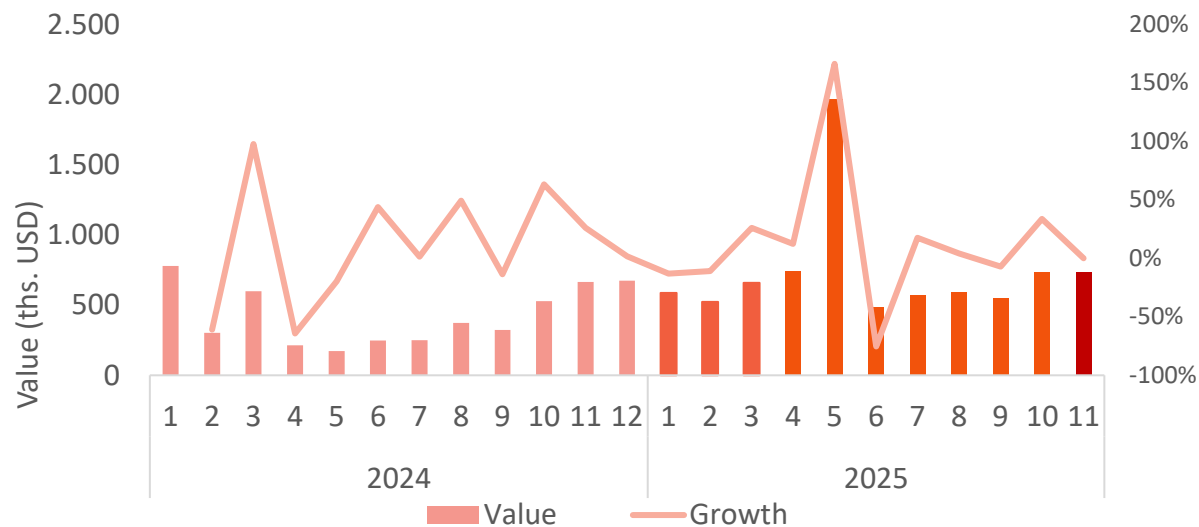


Source: Calculated from data of the Department of Customs



MEAT AND MEAT PRODUCTS (IMPORT)

Import value to China, Nov-2025



Import results to China, Nov-2025

VALUE



737.8

ths. USD

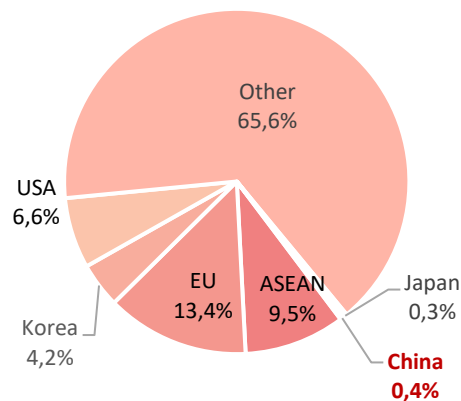
Increase **0.03%** compared to Oct-2025

Increase **129%** compared to Nov-2024

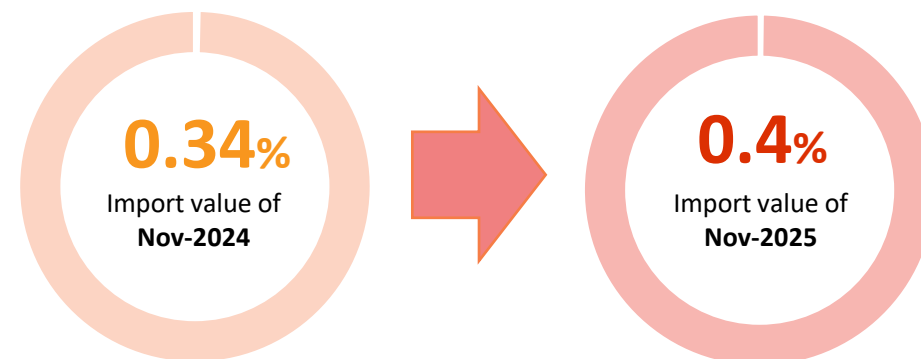
↗ **310.5 ths. USD** more than the monthly average rate in 2024

◇ Accumulated 11 months of 2025 reaches **8.2 mil. USD, 159%** of total 2024

Percentage of import value to China, Nov-2025



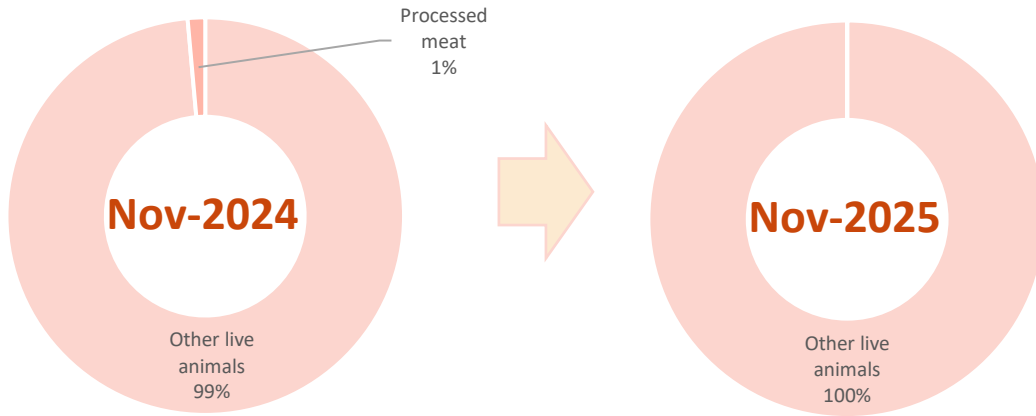
Changes in percentage of import value to China, Nov-2025





MEAT AND MEAT PRODUCTS (IMPORT)

Structure of imports by products from China, Nov-2025



Import results from China, Nov-2025



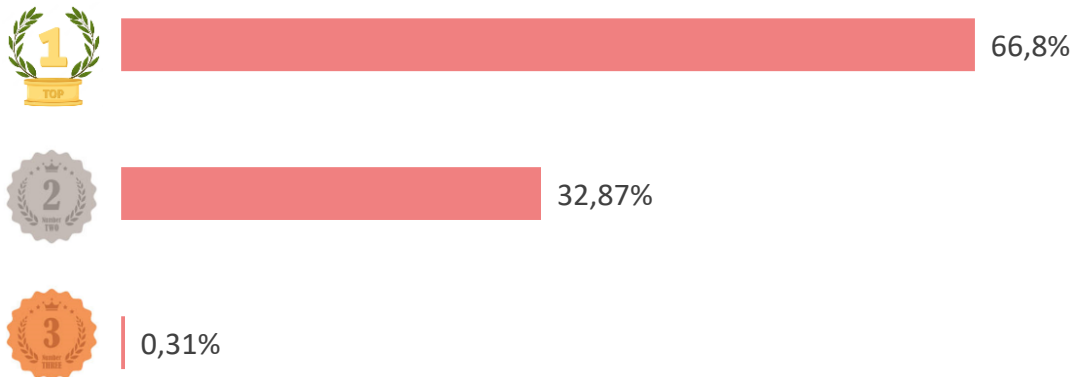
Other live animals

Value: **737.8** ths. USD

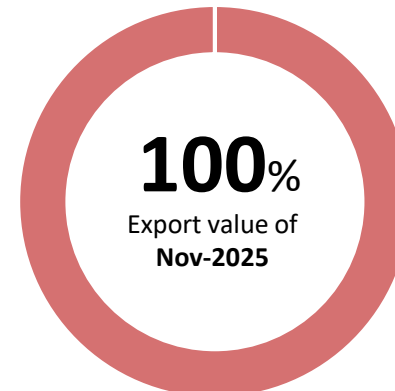
Increase **0.03%** compared to Oct-2025

Increase **12.8%** compared to Nov-2024

TOP 5 import enterprises by value from China, Nov-2025



Value ratio of TOP 5 import enterprises from China, Nov-2025





MEAT AND MEAT PRODUCTS

SPOTLIGHTS

According to the latest report from the USDA, China's pork production in 2025 is projected to reach 57.15 million tonnes, up 1% compared with the previous year. This adjustment is partly based on official data from the National Bureau of Statistics (NBS), which show that pork output in the first half of 2025 reached 30.2 million tonnes, an increase of 390,000 tonnes, equivalent to 1.3% year-on-year.

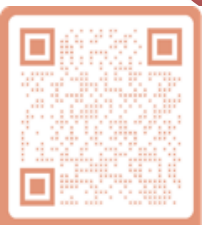
Source: graintrade.com.ua



The Chinese government decided to extend for a second time an investigation into the potential application of emergency safeguard measures on meat imports, aimed at protecting domestic production and curbing the rapid increase in beef imports.

The investigation, which was launched on December 24, 2024, has been extended until January 26, 2026. IMEA assesses that if restrictive measures are implemented, the growth rate of China's meat imports will slow down; however, the extent of the impact will depend on the scope and intensity of the measures adopted by China.

Source: graintrade.com.ua





Any comments. please send to:

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