



ISPAE

Volume: Dec-2025



MONTHLY REPORT ON AGRI-PRODUCT EXPORT

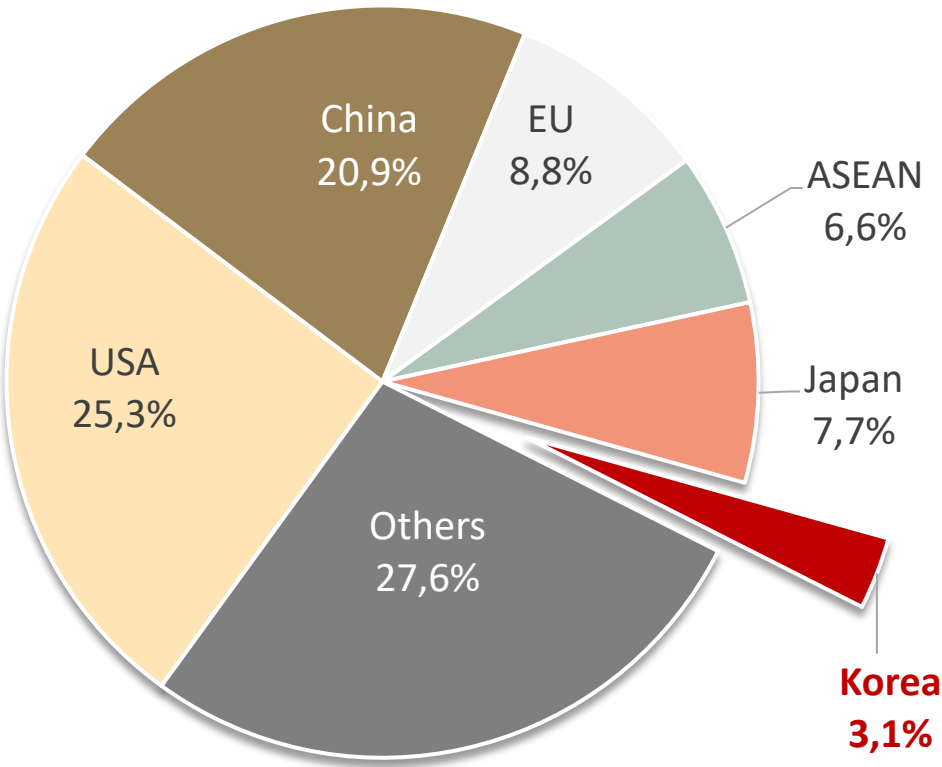
FROM VIETNAM TO TO KOREA (ROK) MARKET

Prepared by: **AGREINFOS**



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

Proportion export value of key AFF products to the Korea in Nov-2025

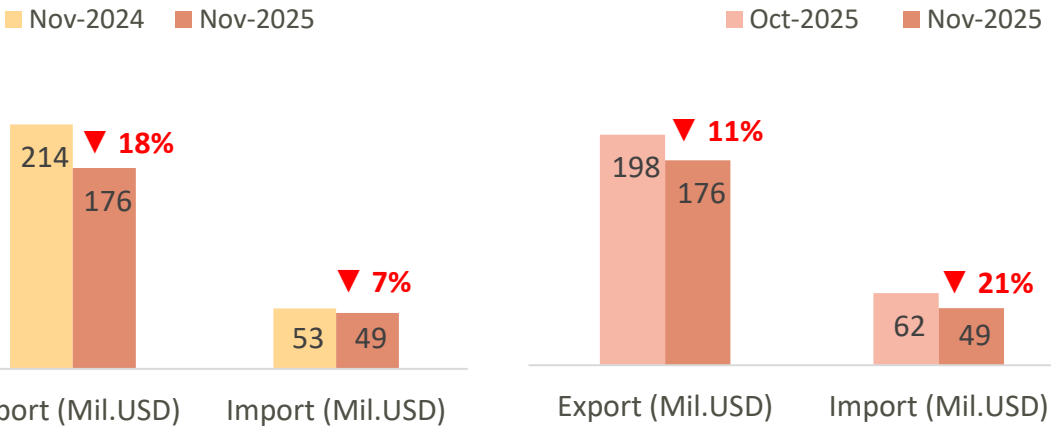


Changes in proportion export value of key AFF products to the Korea in Nov-2025 compared to Nov-2024 and Oct-2025

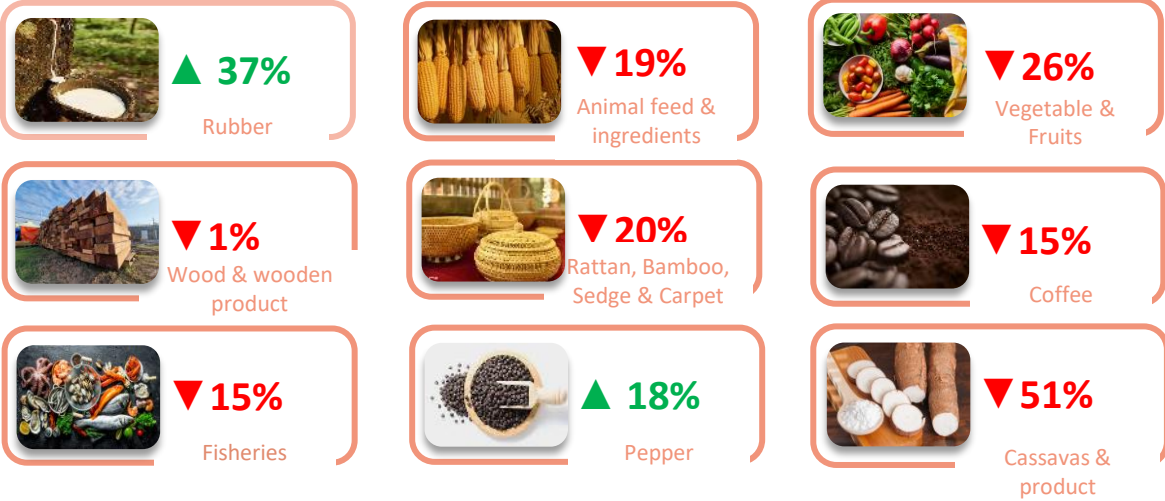
Country	Value (Mil.USD)	Compared to Oct-2025	Compared to Nov-2024
USA	1.431	▼ 2,2%	▲ 3,4%
China	1.182	▼ 0,6%	▼ 1,7%
EU	498	▲ 0,8%	▲ 0,9%
ASEAN	375	▲ 0,5%	▼ 4,0%
Japan	437	▲ 0,4%	▲ 1,2%
Korea	176	▼ 0,2%	▼ 0,9%
Total Export value (Mil.USD)			5.658

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

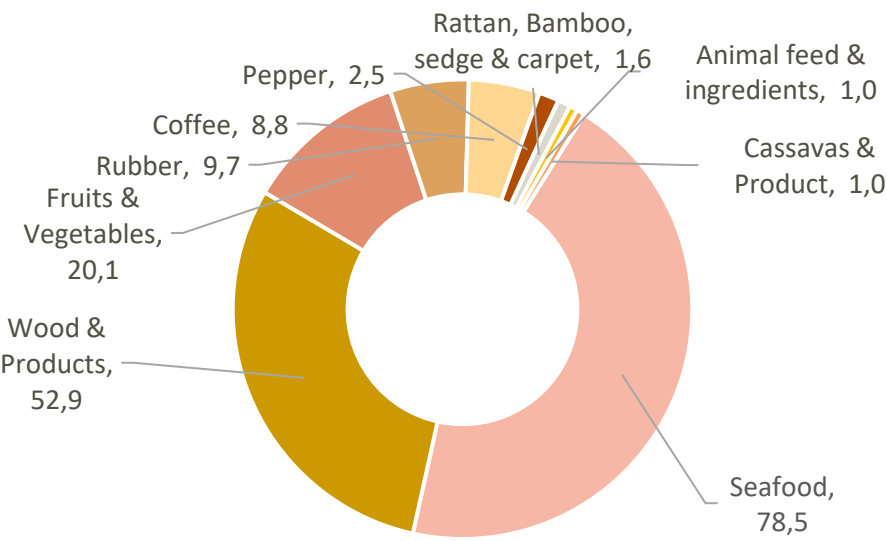
AFF product import-export turnover between Vietnam and Korea, Nov-2025



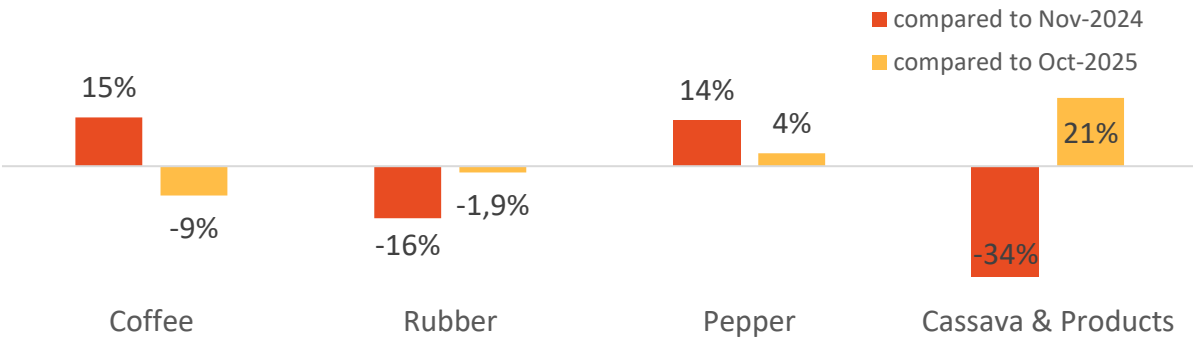
Changes in key AFF product export value to the Korea in Nov-2025 compared to Oct-2025



Key AFF product export value to Korea, Nov-2025



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





South Korea's economy will face challenge in 2026

South Korea's economy in 2026 will continue facing significant challenges as ongoing global economic uncertainty weighs on growth, while exchange rate volatility, inflation, and intensifying competition from China add to downside risks.

Although exports—particularly semiconductors and AI-related technologies—are expected to remain the primary growth driver, domestic growth is likely to slow and consumer sentiment is projected to remain weak. In this context, South Korea will need to focus on enhancing competitiveness and increasing value added in order to sustain economic growth in 2026

Source: lsvn.vn

The IMF forecasts that the South Korean economy will recover in 2026

The IMF forecasts that South Korea's economy will recover markedly in 2026, with growth reaching around 1.8%, after beginning to rebound in the second half of 2025. Thanks to accommodative fiscal and monetary policies and improving consumer sentiment, economic growth in 2025 is forecast at 0.9%. The IMF notes that South Korea has stable economic fundamentals and strong resilience, but also warns of risks stemming from trade uncertainties, geopolitical tensions, and a slowdown in AI-related demand affecting the semiconductor sector. The organization recommends that South Korea encourages investment in research and development and innovation to sustain long-term, sustainable growth.

Source: vietnamese.korea.net



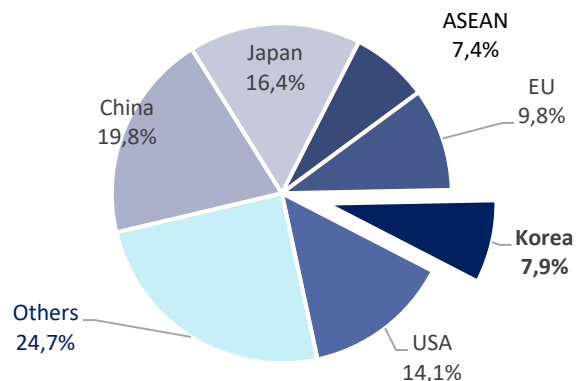


FISHERIES

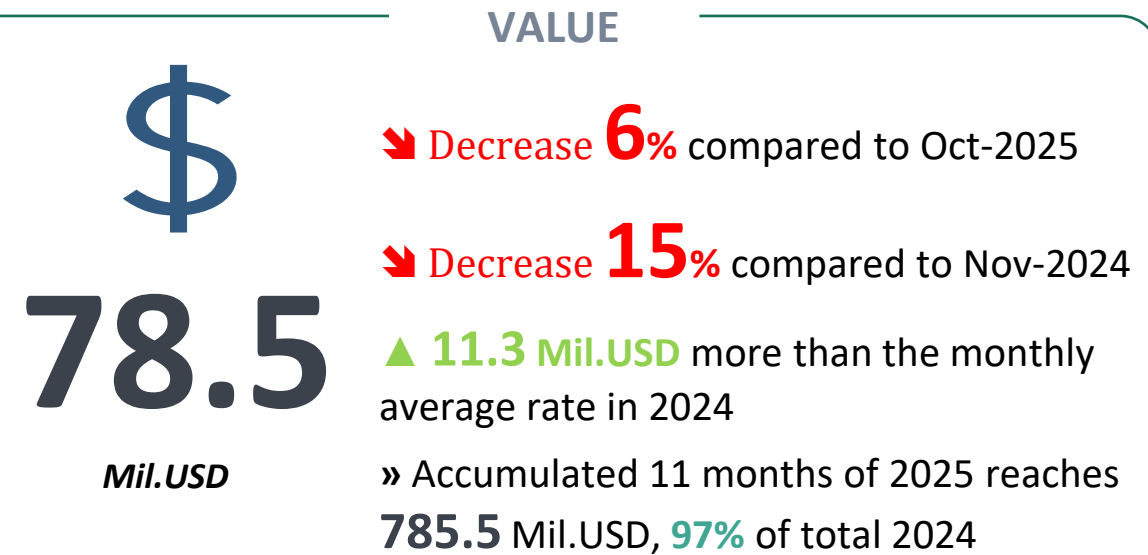
Export value to Korea, Nov-2025



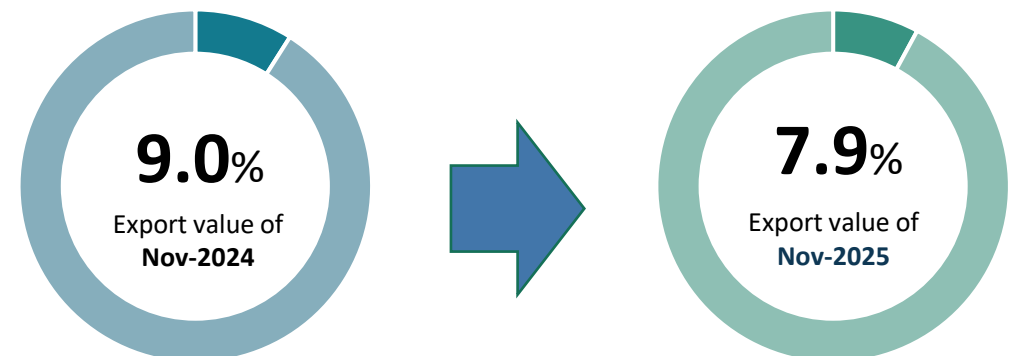
Percentage of export value to Korea, Nov-2025



Export results to Korea, Nov-2025



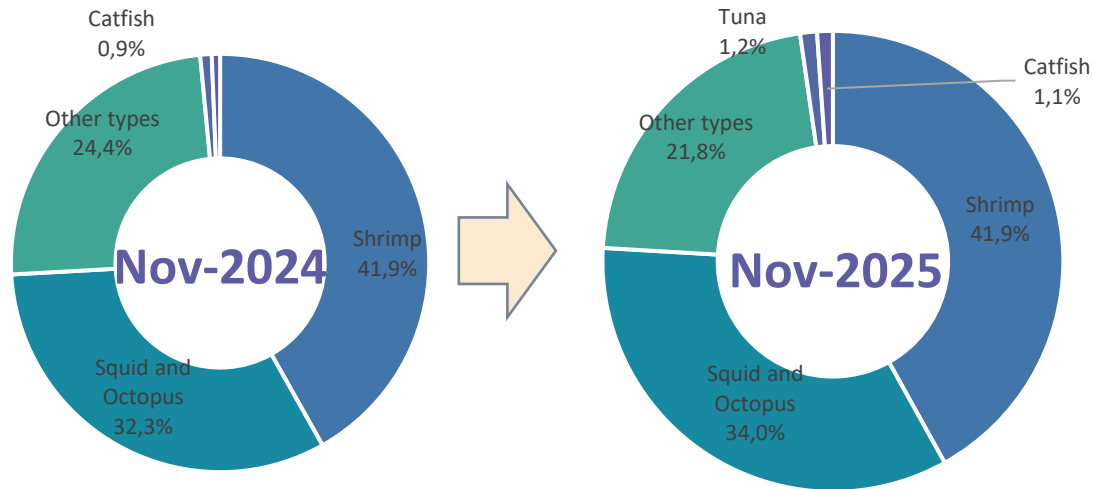
Changes in percentage of export results to Korea, Nov-2025



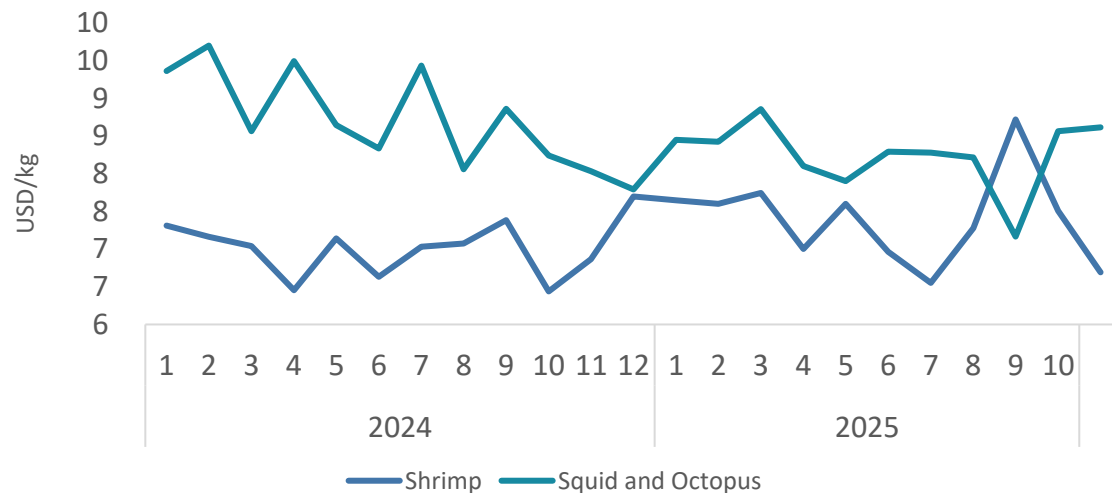


FISHERIES

Structure of exports by products to Korea, Nov-2025



Average export price to Korea, Nov-2025



Source: Calculated from data of the Department of Customs

Export results to Korea, Nov-2025



Shrimp

Value: **32.9** Mil.USD

Decrease 6% compared to Oct-2025

Decrease 5% compared to Nov-2024



Squid and Octopus

Value: **26.7** Mil.USD

Decrease 16% compared to Oct-2025

Decrease 0.4% compared to Nov-2024



Tuna

Value: **0.9** Mil.USD

Decrease 19% compared to Oct-2025

Increase 76% compared to Nov-2024

Shrimp

The average export price in Oct-2025 is **6,7 USD/kg**; **decrease 11%** compared to the previous month; and **decrease 3%** compared to the same month of 2024.

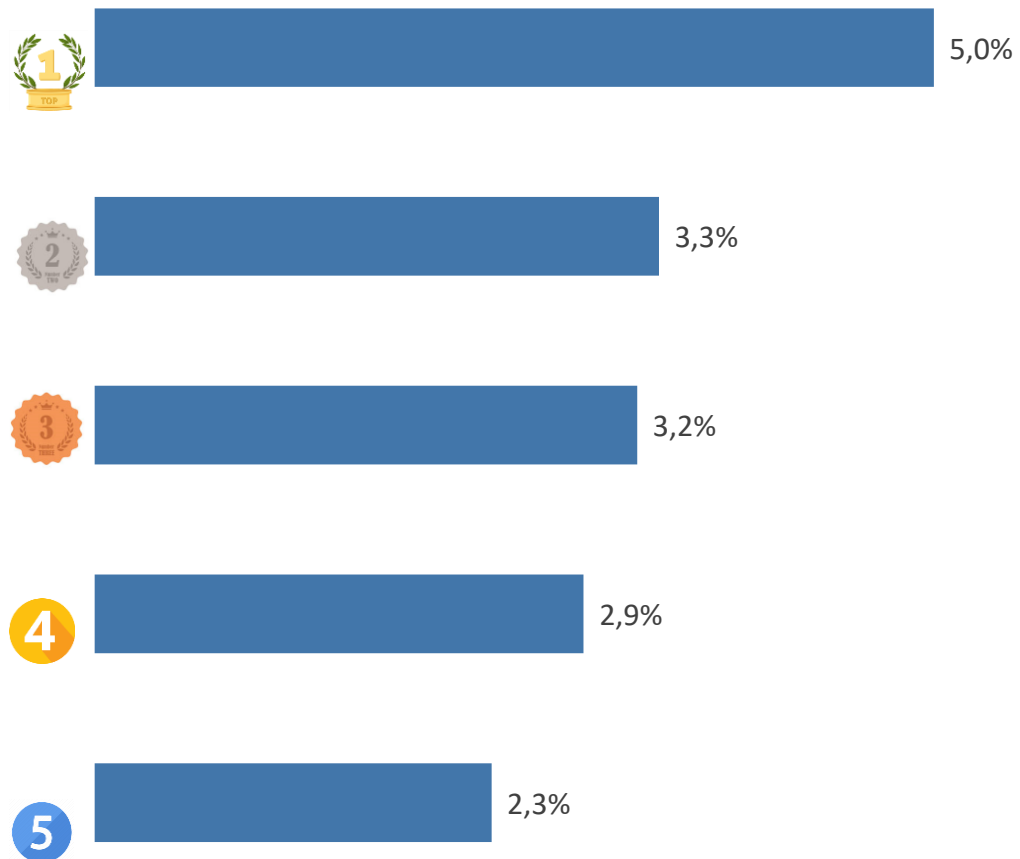
Squid and Octopus

The average export price in Oct-2025 is **8,6 USD/kg** **increase 0,6%** compared to the previous month; and **increase 7%** compared to the same month of 2024.

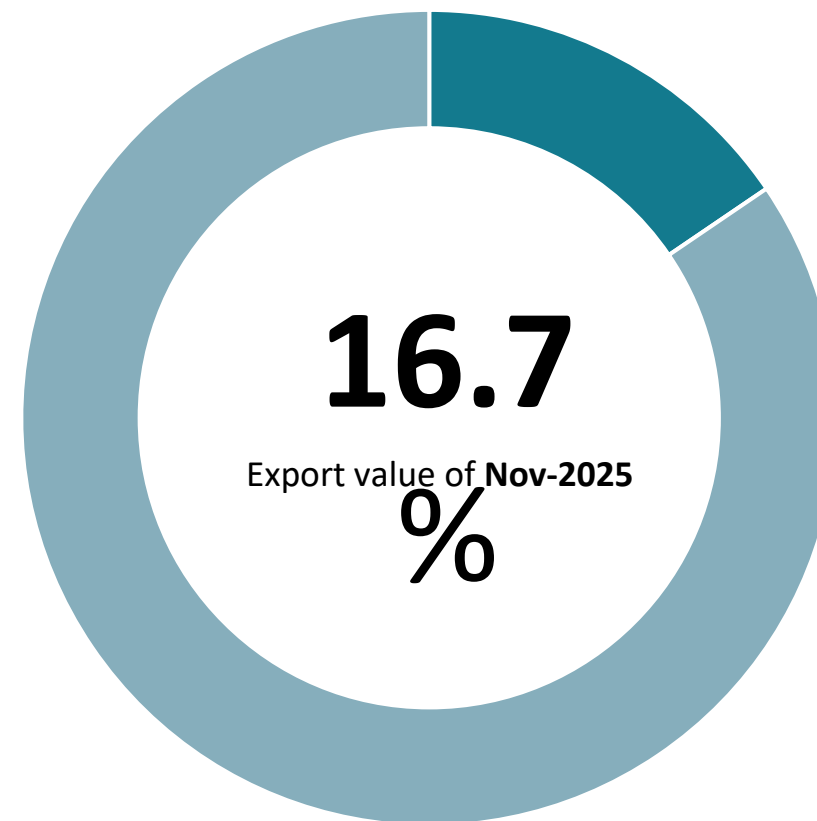


FISHERIES

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



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



01



South Korea's mackerel exports hit a record despite domestic shortages

South Korea witnessed a paradox of “domestic shortages alongside rising exports” for mackerel and squid. In 2025, the average retail price of large domestically sold mackerel (400g and above) reached 4,689 won per fish, up 16.9% year on year, while domestic squid prices climbed to 7,104 won due to supply shortages. Meanwhile, mackerel exports hit a record 144,484 tons valued at USD 260 million, up 83.4% in volume and 128.8% in value. Squid exports totaled 31,457 tons worth USD 113.4 million, the highest level since 2016.

The main reasons are differences in preferences and supply sources. South Korean consumers favor medium-to-large mackerel and therefore rely on imports, while exported mackerel consists largely of smaller sizes that are less popular domestically. By contrast, countries such as Ghana, Nigeria, and Côte d'Ivoire—accounting for about half of mackerel exports—prefer smaller fish for frying, smoking, or animal feed. For squid, coastal catches have fallen sharply due to rising sea temperatures, while most exports are *Illex* squid caught in distant waters near the Falkland Islands. The Ministry of Oceans and Fisheries noted that a 22% tariff exemption on squid imports from joint ventures, intended to stabilize domestic prices, may also have contributed to lower prices and increased exports.

Source: Korea JoongAng Daily



Tin liên quan

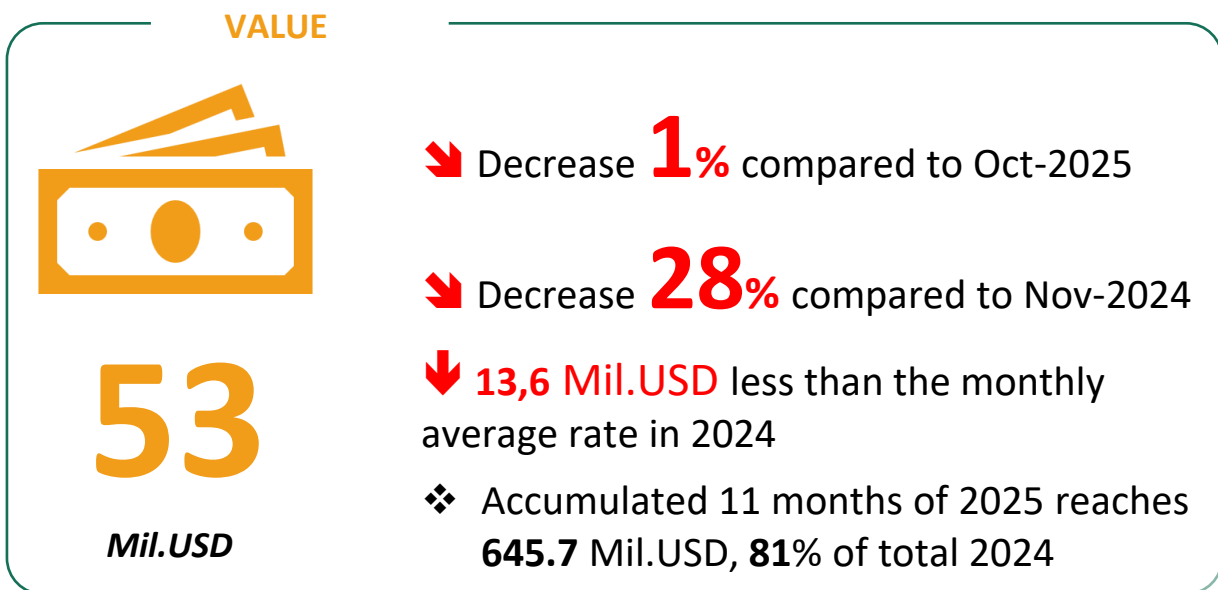


WOOD AND WOOD PRODUCTS

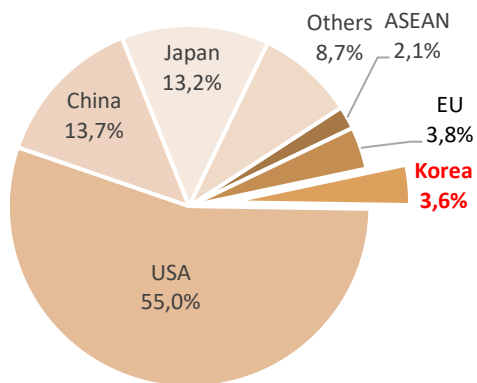
Export value to Korea, Nov-2025



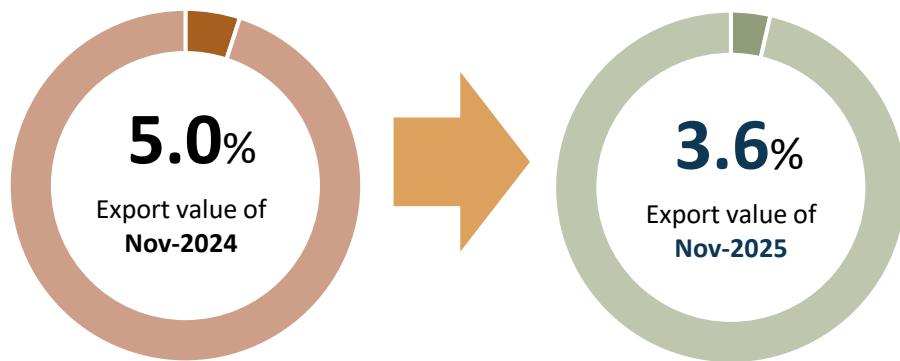
Export results to Korea, Nov-2025



Export results to Korea, Nov-2025



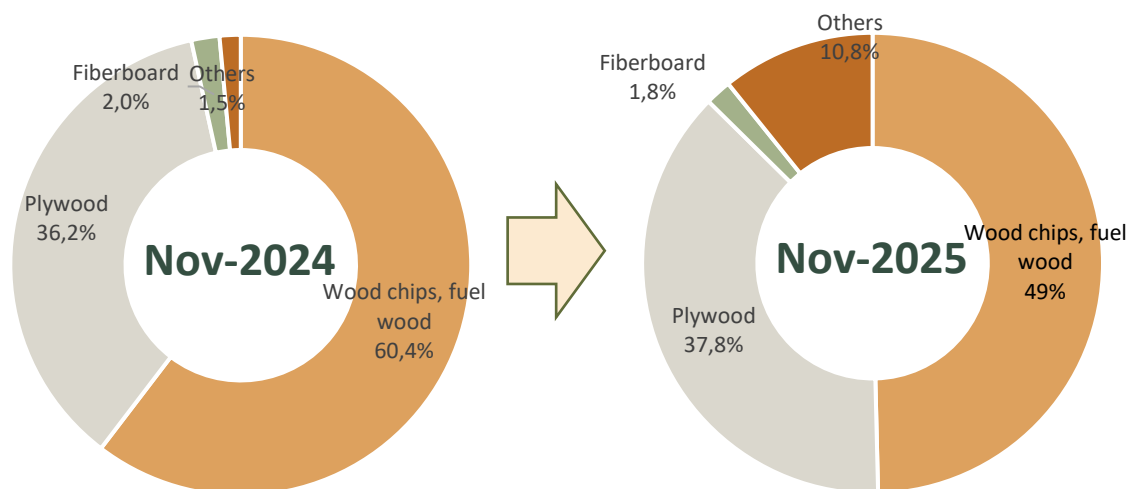
Changes in percentage of export results to Korea, Nov-2025



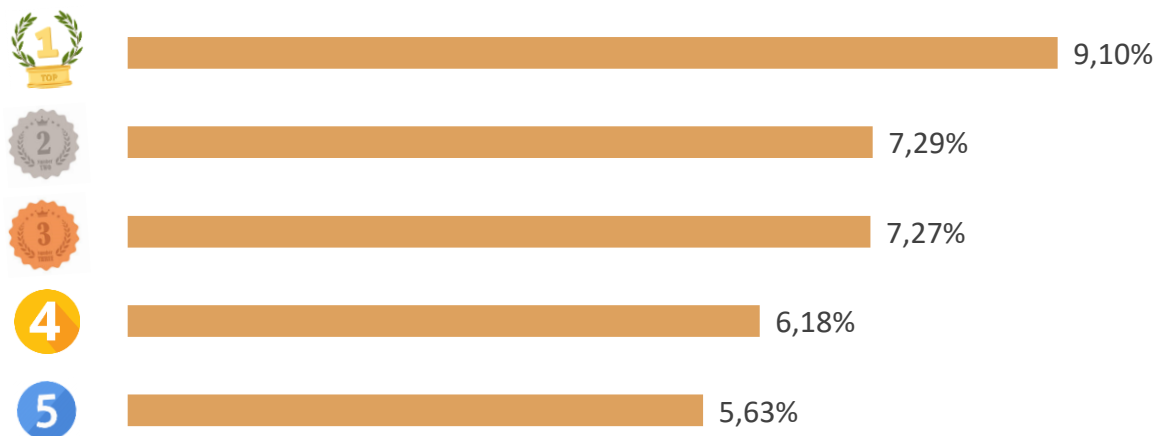


WOOD AND WOOD PRODUCTS

Structure of exports by products to Korea, Nov-2025



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



Export results to Korea, Nov-2025



Wood chips

Value: **17.9** Mil.USD

Decrease **13%** compared to Oct-2025

Decrease **42%** compared to Nov-2024



Plywood

Value: **13.6** Mil.USD

Increase **8%** compared to Oct-2025

Decrease **26%** compared to Nov-2024



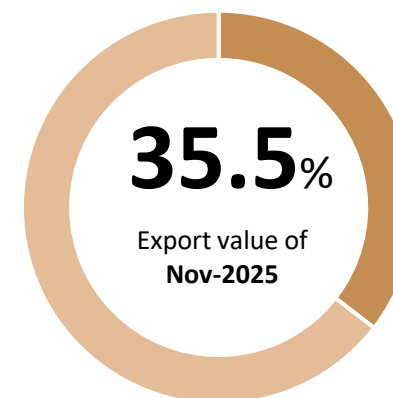
Fiberboard

Value: **0.6** Mil.USD

Increase **59%** compared to Oct-2025

Decrease **35%** compared to Nov-2024

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





WOOD AND WOOD PRODUCTS



SPOTLIGHT

On 5–6 December 2025, the Korea Association for Domestic Wood Utilization Technology held a thematic workshop in Anseong to identify strategies for industrializing domestic timber resources amid mounting challenges facing the sector. The event focused on transforming domestically sourced wood from a simple raw material into a high value-added industrial resource by standardizing kiln-drying processes, modernizing equipment, and, in particular, establishing a “local production, local consumption” model to build a regional circular ecosystem spanning sawing, processing, and distribution.

In addition to discussions on policy directions from the Korea Forest Service, the workshop also addressed in-depth technical issues and digital transformation applications, seeking practical solutions to enhance self-sufficiency and competitiveness across the domestic timber supply chain.

Source: woodkorea.co.kr

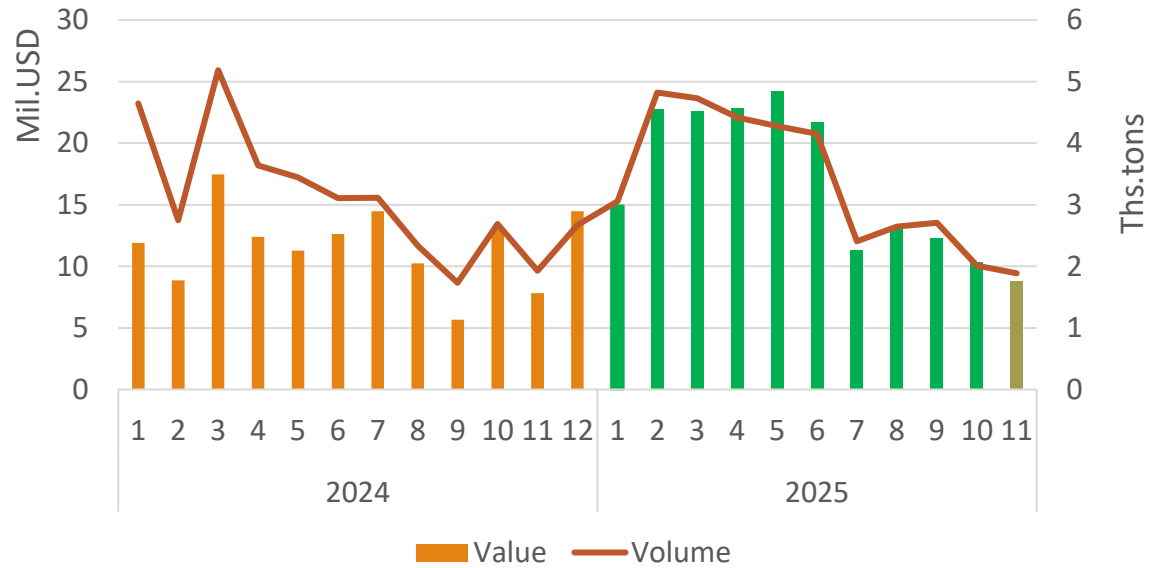


TIN LIÊN QUAN

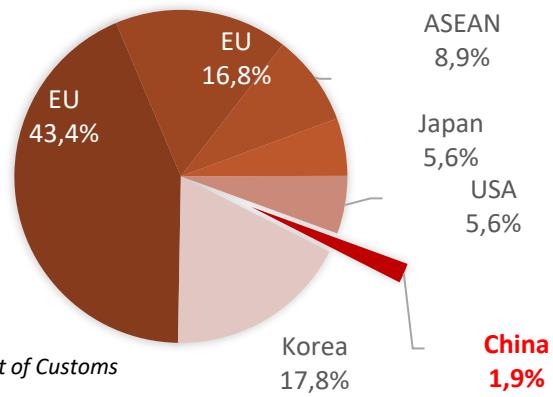


COFFEE

Export volume and value to Korea, Nov-2025



Percentage of export value to Korea, Nov-2025



Export results to Korea, Nov-2025

VALUE

8.8 Mil.USD

⬇️ Decrease **15%** compared to Oct-2025

⬆️ Increase **13%** compared to Nov-2024

⬇️ **2.9 Mil.USD** less than the monthly average rate in 2024.

❖ Accumulated 11 months of 2025 reaches **186** tr.USD, **132%** of total 2024.

VOLUME

1.9 Ths.tons

⬇️ Decrease **6%** compared to Oct-2025

⬇️ Decrease **2%** compared to Oct-2025

⬇️ **1.2 Ths.tons** less than the monthly average rate in 2024.

❖ Accumulated 11 months of 2025 reaches **37.1** Ths.tons, **99.7%** of total 2024.

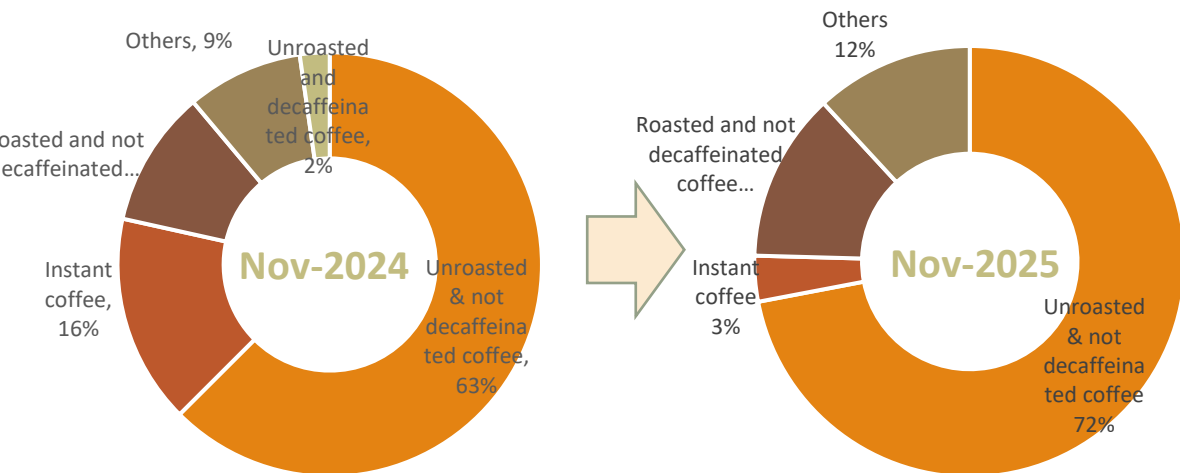
Changes in percentage of export results to Korea, Nov-2025



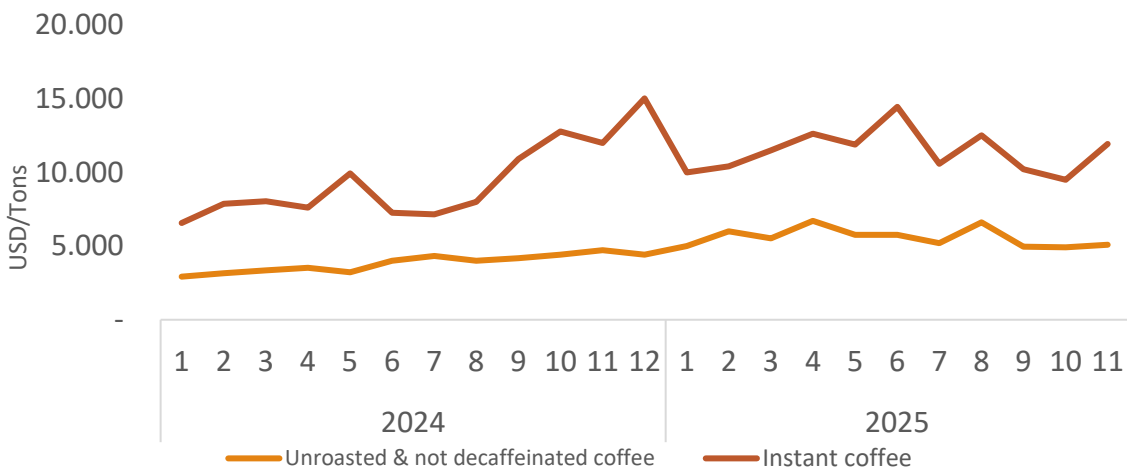


COFFEE

Structure of exports by products to Korea, Nov-2025



Average export price to Korea, Nov-2025



Source: Calculated from data of the Department of Customs

Export results to Korea, Nov-2025



Unroasted & not decaffeinated coffee

Value: **6.2** Mil.USD
Decrease **8%** compared to Oct-2025
Increase **28%** compared to Nov-2024



Instant coffee

Value: **0.3** Mil.USD
Decrease **70%** compared to Oct-2025
Decrease **76%** compared to Nov-2024



Roasted and not decaffeinated coffee

Value: **1.1** Mil.USD
Increase **21%** so compared to Oct-2025
Increase **36%** compared to Nov-2024

Instant coffee

The average export price in Oct-2025 is **11,925** USD/tons, **increase 26%** compared to the previous month; and **decrease 1%** compared to the same month of 2024.

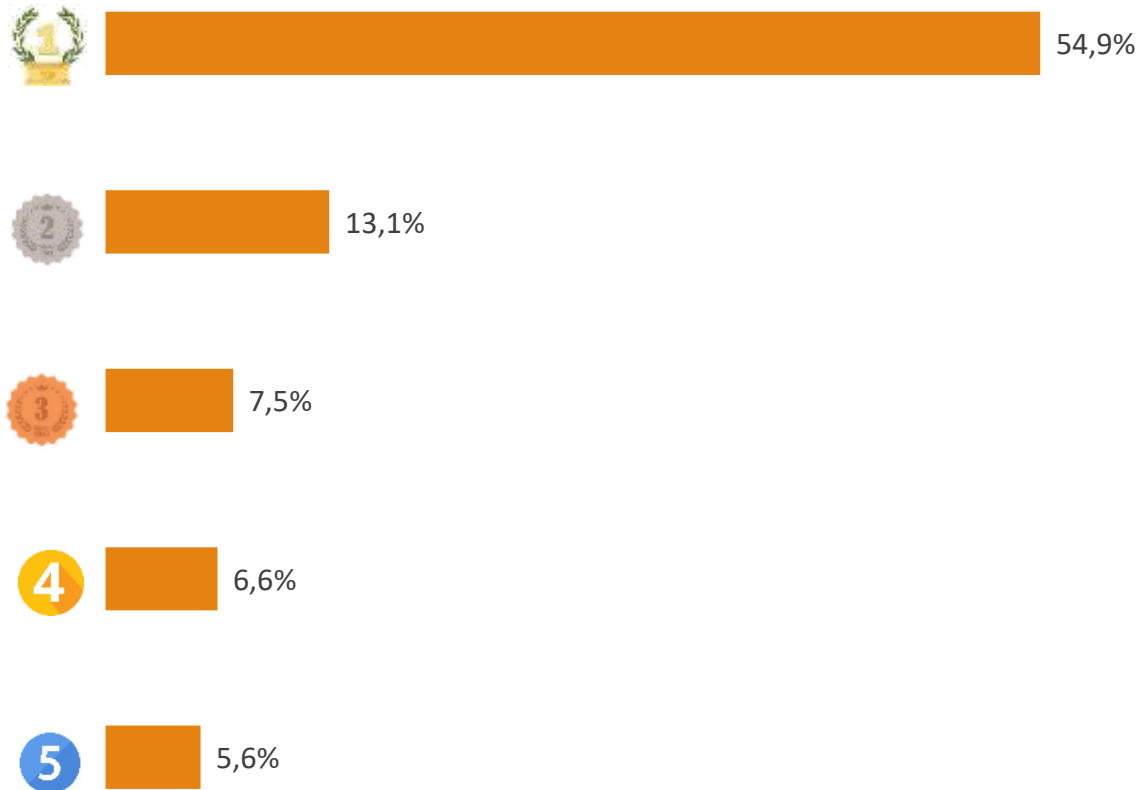
Unroasted & not decaffeinated coffee

The average export price in Oct-2025 is **5,096** USD/tons, **increase 4%** compared to the previous month; and **increase 8%** compared to the same month of 2024.

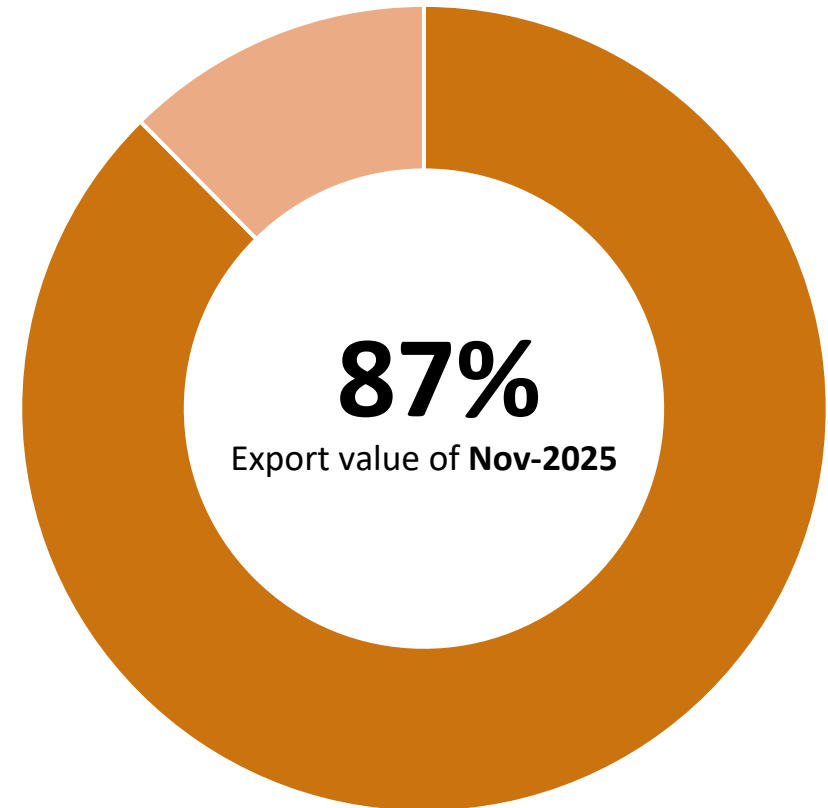


COFFEE

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



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





COFFEE

SPOTLIGHT



In South Korea, imported coffee prices are coming under upward pressure due to the depreciation of the Won, despite of the global downward trend in coffee prices. According to data from the Bank of Korea as of November 2025, coffee import prices in U.S. dollars fell by 1.0% year on year as global demand softened, but increased by 3.6% when converted into Won. This divergence highlights the impact of exchange-rate movements, as the Won has been among the currencies that have depreciated with the highest level in recent years.

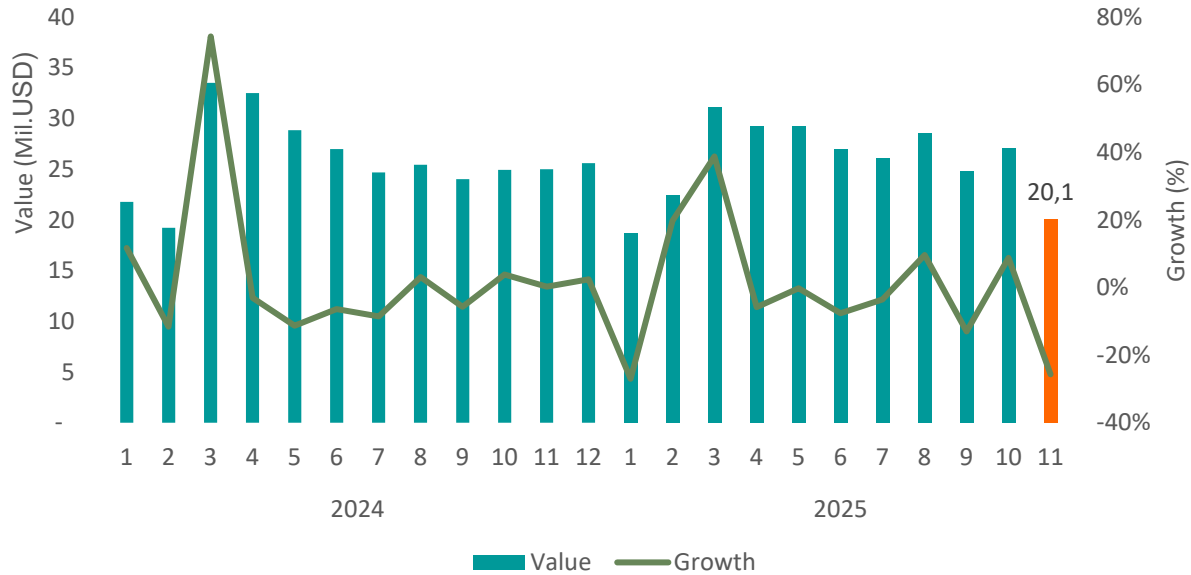
Compared with 2020, South Korea's coffee import prices surged by 207% in U.S. dollar terms, while the increase measured in Won was as high as 280%, indicating that exchange-rate risks are significantly amplifying import costs. Given its complete reliance on external supply, coffee has become one of the commodities most directly affected by currency fluctuations, thereby exerting inflationary pressure on consumer prices in South Korea over the medium term.





FRUITS & VEGETABLES (EXPORT)

Export value to Korea, Nov-2025



Export results to Korea, Nov-2025

VALUE



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

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

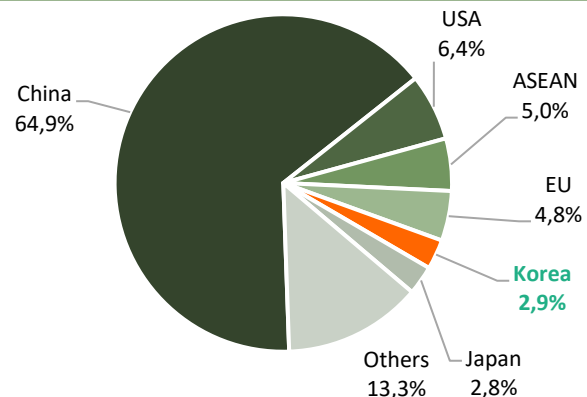
20.1

Mil.USD

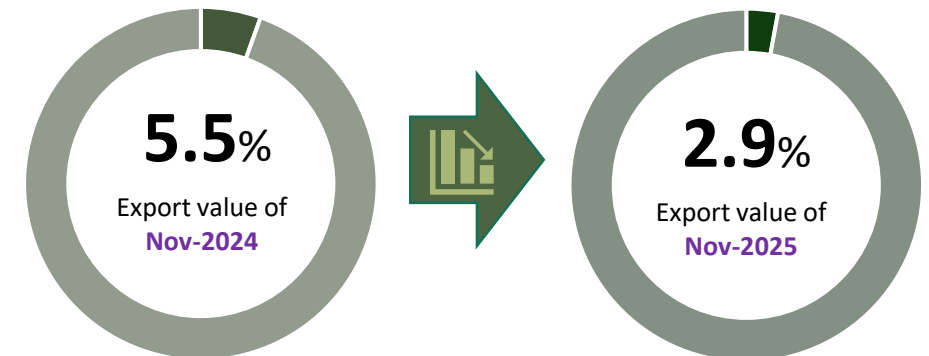
6.2 Mil.USD less than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **284.2 Mil.USD**, **90.2%** of total 2024

Percentage of export value to Korea, Nov-2025

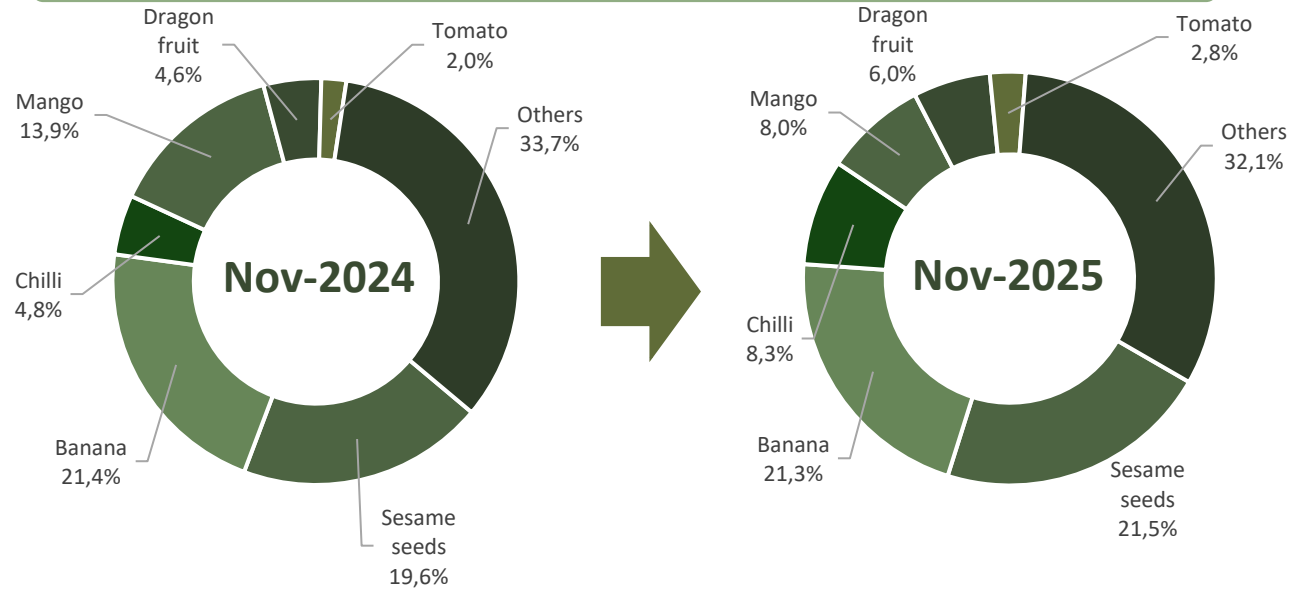


Changes in percentage of export results to Korea, Nov-2025



FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to Korea, Nov-2025



Export results to Korea, Nov-2025



Sesame seeds

Value: **4.3** Mil.USD

Decrease **4%** compared to Oct-2025

Decrease **12%** compared to Nov-2024



Banana

Value: **4.3** Mil.USD

Decrease **34%** compared to Oct-2025

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



Chilli

Value: **1.7** Mil.USD

Decrease **13%** compared to Oct-2025

Increase **40%** compared to Nov-2024



Mango

Value: **1.6** Mil.USD

Decrease **37%** compared to Oct-2025

Decrease **54%** compared to Nov-2024



Dragon fruit

Value: **1.2** Mil.USD

Increase **9%** compared to Oct-2025

Increase **6%** compared to Nov-2024



Tomato

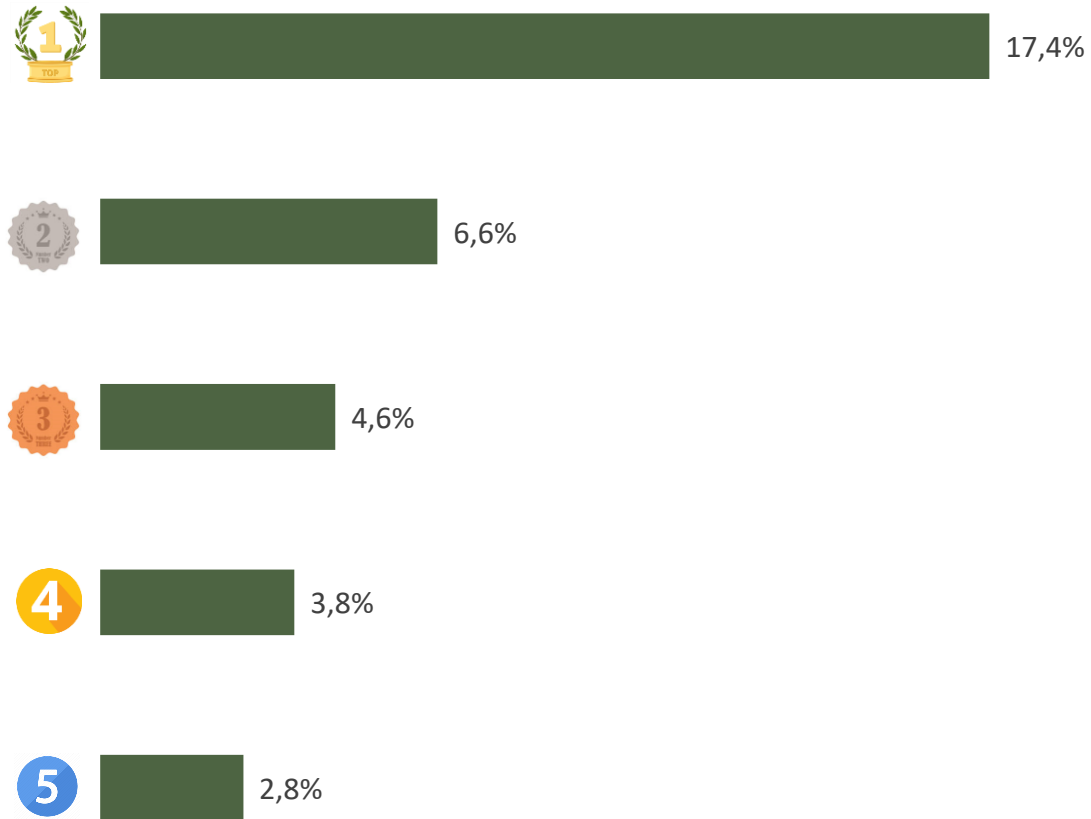
Value: **0.6** Mil.USD

Decrease **5%** compared to Oct-2025

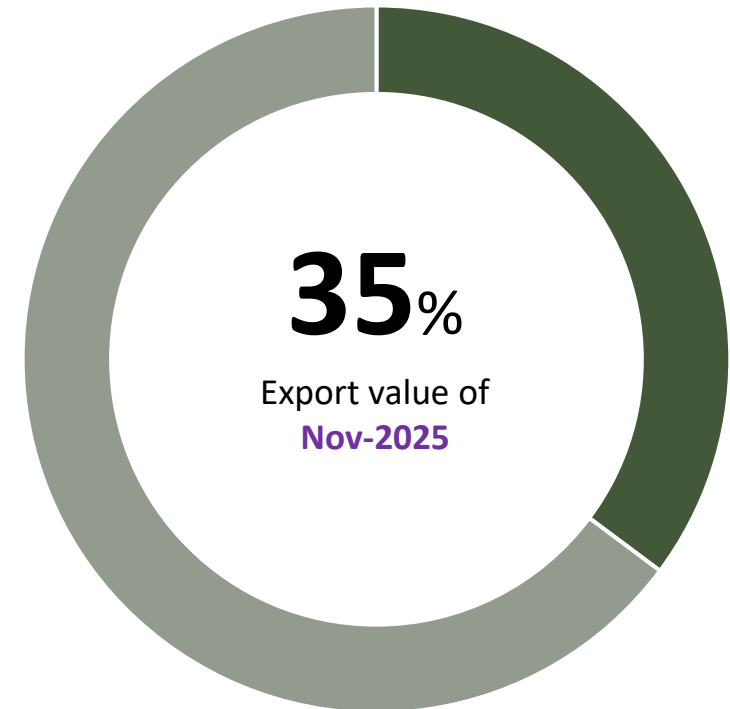
Cao gấp **13%** compared to Nov-2024

FRUITS & VEGETABLES (EXPORT)

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

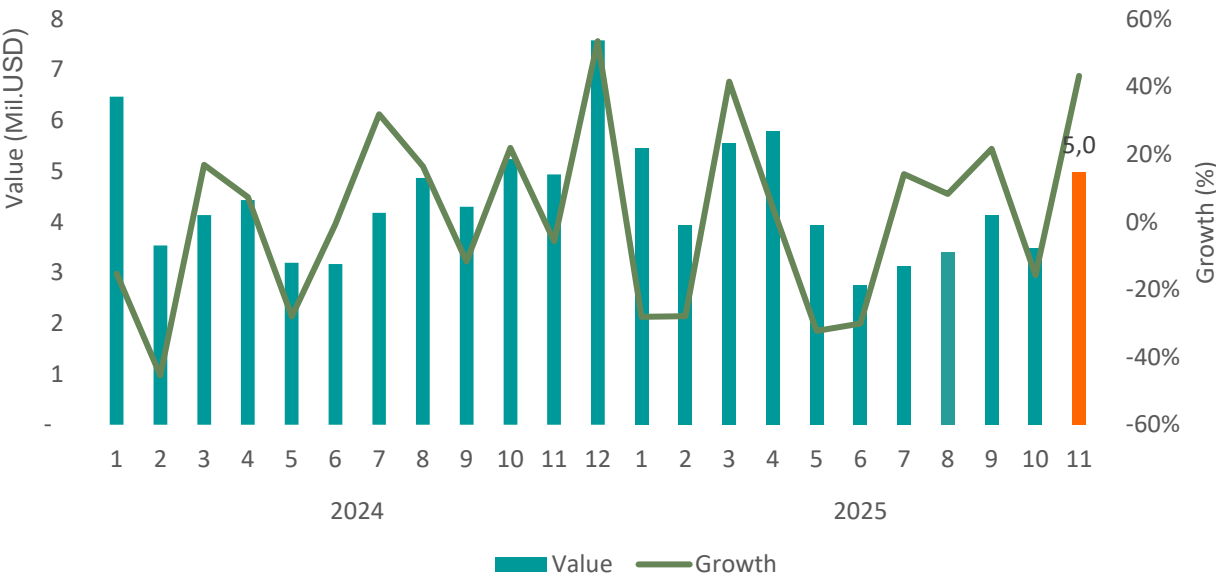


Value ratio of TOP 5 export enterprises to Korea, Nov-2025



FRUITS & VEGETABLES (IMPORT)

Import value to Korea, Nov-2025



Import results to Korea, Nov-2025



5.0

Mil.USD

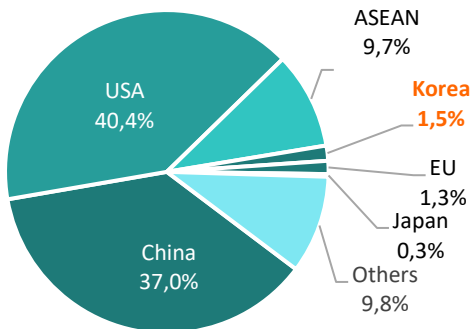
Increase **43%** compared to Oct-2025

Increase **1%** compared to Nov-2024

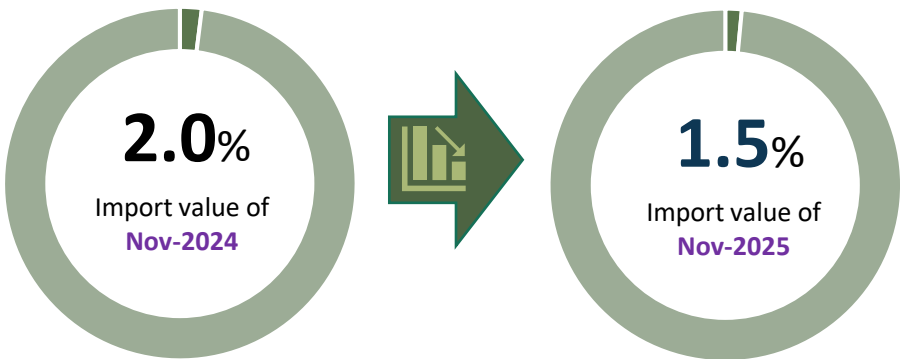
0.29 Mil.USD less than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **46.5 Mil.USD**, **83%** of total 2024

Percentage of import value to Korea, Nov-2025



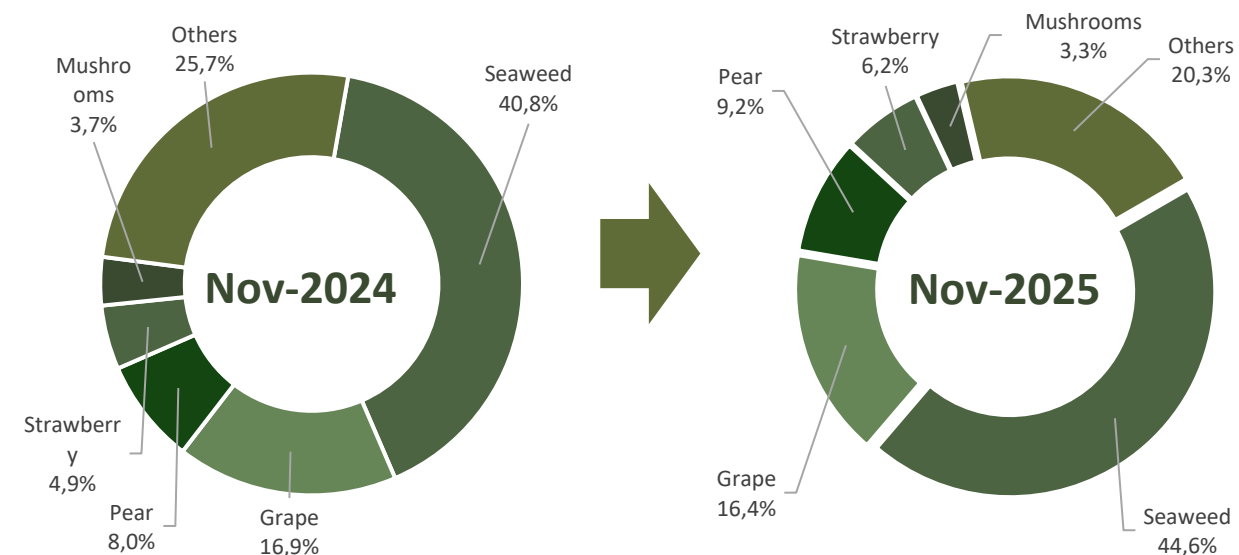
Changes in percentage of import results to Korea, Nov-2025



Source: Calculated from data of the Department of Customs

FRUITS & VEGETABLES (IMPORT)

Structure of import by products from Korea, Nov-2025



Import results from Korea, Nov-2025



Seaweed

Value: **2.2** Mil.USD

Increase **29%** compared to Oct-2025

Increase **10%** so compared to Nov-2024



Grape

Value: **816.1** Ths.USD

Increase **44%** compared to Oct-2025

Decrease **2%** compared to Nov-2024



Pear

Value: **456.3** Ths.USD

Decrease **4%** compared to Oct-2025

Increase **15%** compared to Nov-2024



Strawberry

Value: **307.4** Ths.USD

Cao gấp **42** time compared to Oct-2025

Increase **27%** compared to Nov-2024



Mushrooms

Value: **164.9** Ths.USD

Increase **14%** compared to Oct-2025

Decrease **10%** compared to Nov-2024



South Korea's strawberry exports surge

South Korea's strawberry exports are approaching a record level of 1 trillion Won per year (approximately USD 680 million), comparing to 99.3 billion Won last year (around USD 67.5 million), making strawberries the country's top agricultural export product.

Around 90% of exports are destined for Southeast Asian markets. Consumers in Singapore, Vietnam, and Indonesia highly value South Korean strawberries for their sweetness, juiciness, and consistent quality. This competitive edge is supported by a strong domestic breeding system featuring varieties such as Seolhyang, Maehyang, Geumsil, and Kingsberry, along with tightly controlled cultivation practices.





South Korea integrates artificial intelligence into apple cultivation

Uiseong County in South Korea will invest KRW 4 billion (approximately USD 3 million) during the 2026–2027 period to roll out a smart agriculture model for open-field apple cultivation. The project will establish a 30-hectare smart apple orchard integrating artificial intelligence, data, and robotics technologies, including weather alert systems, smart irrigation, unmanned pest and disease monitoring, and smart beekeeping.

The project aims to reduce labor requirements by 30%, stabilize production, and improve fruit quality, thereby enhancing the competitiveness of Uiseong apples. It is expected to serve as a pilot model for nationwide expansion and to promote innovation in smart agriculture across South Korea.

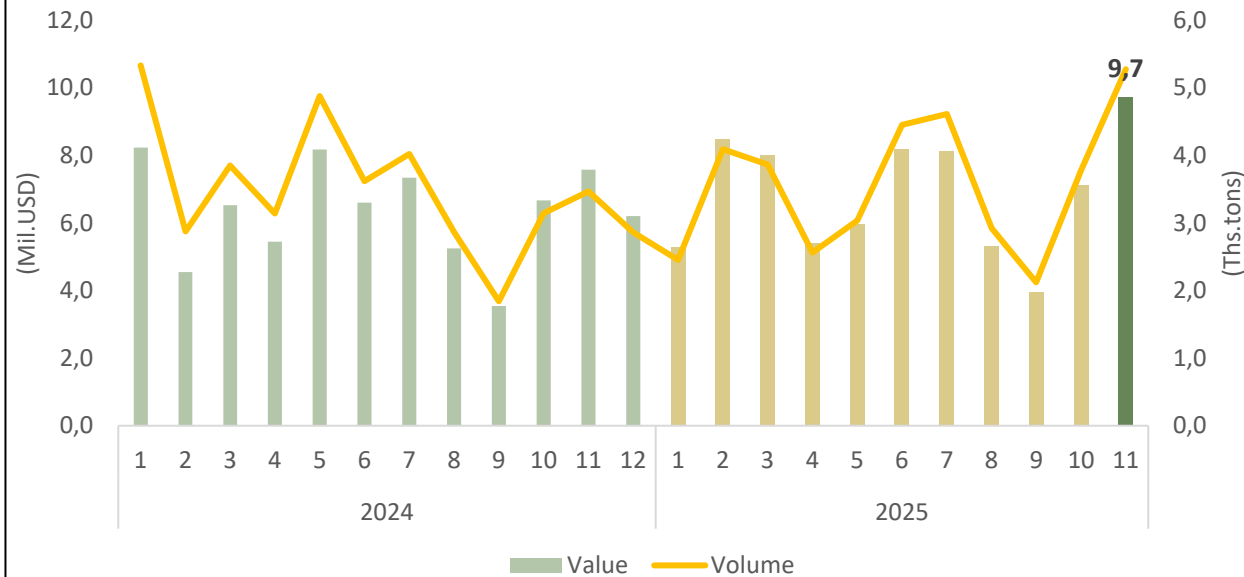
Source: Fructidor.com





RUBBER

Export volume and value to Korea, Nov-2025



Export results to Korea, Nov-2025

VALUE
9.73

Mil.USD



↗ Increase **37%** compared to Oct-2025

↗ Increase **29%** compared to Nov-2024

↑ **3.4 Mil.USD** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **75.5 tr.USD**, **99%** of total 2024

VOLUME
5.3

Ths.tons



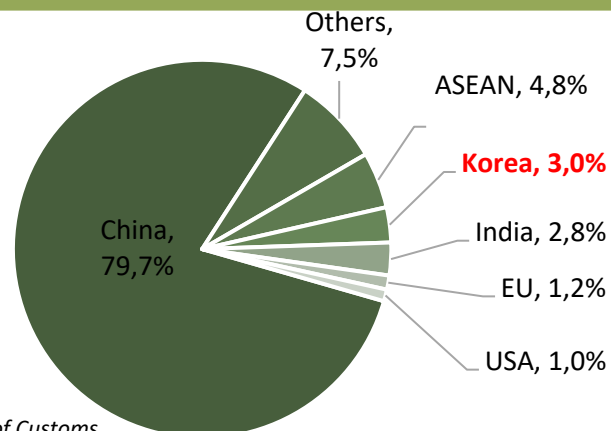
↗ Increase **40%** compared to Oct-2025

↗ Increase **52%** compared to Nov-2024

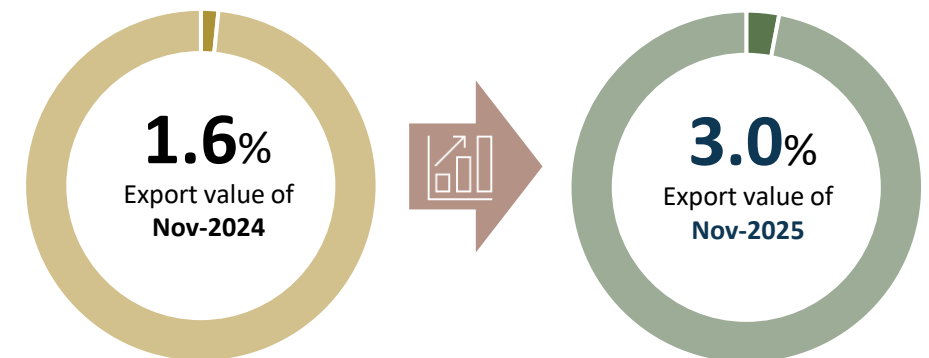
↑ **1.8 Ths.tons** more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **39.2 Ths.tons**, **94%** of total 2024

Percentage of export value to Korea, Nov-2025



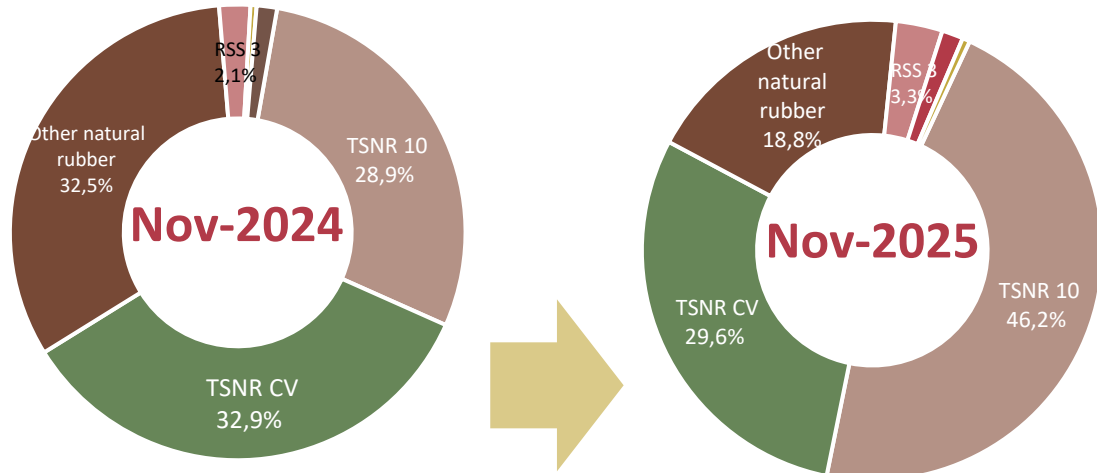
Changes in percentage of export value to Korea, Nov-2025



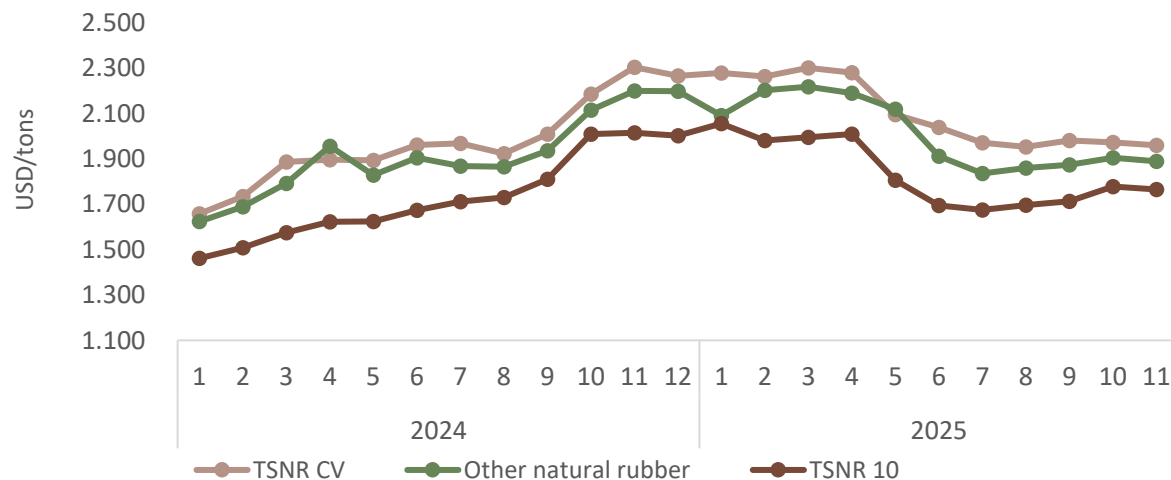


RUBBER

Structure of exports by products to Korea, Nov-2025



Average export price to Korea, Nov-2025



Export results to Korea, Nov-2025



Other natural rubber

Value: **1.24** Mil.USD

Decrease **18%** compared to Oct-2025

Decrease **42%** compared to Nov-2024



TSNR CV

Value: **1.95** Mil.USD

Decrease **23%** compared to Oct-2025

Decrease **35%** compared to Nov-2024



TSNR 10

Value: **3.04** Mil.USD

Increase **16%** compared to Oct-2025

Increase **48%** compared to Nov-2024

Cao su tự nhiên khác

The average export price in Oct-2025 is **1,889** USD/tons; decrease **0.8%** compared to the previous month; and decrease **14%** compared to the same month of 2024.

TSNR CV

The average export price in Oct-2025 is **1,959** USD/tons; decrease **0,6%** compared to the previous month; and decrease **15%** compared to the same month of 2024.

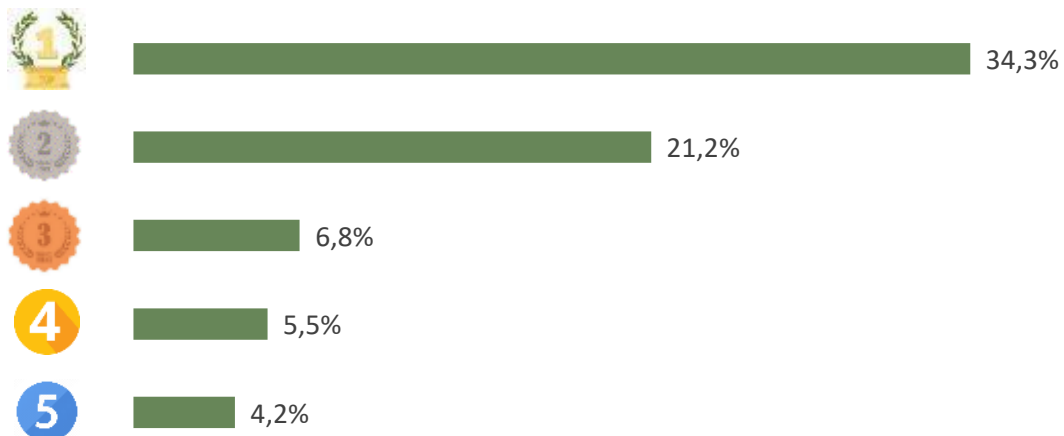
TSNR 10

The average export price in Oct-2025 is **1,766** USD/tons decrease **0,7%** compared to the previous month; and decrease **12%** compared to the same month of 2024.

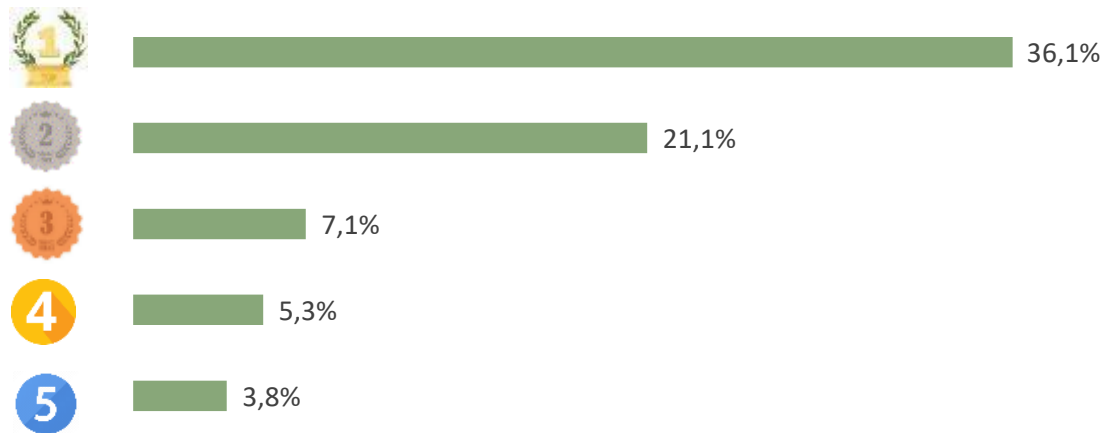


RUBBER

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



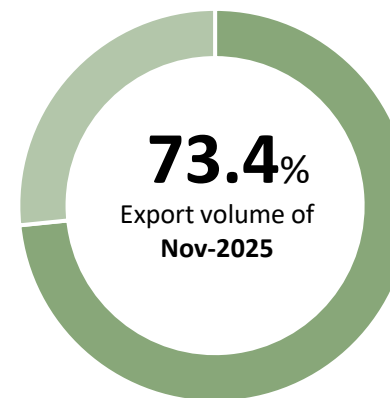
TOP 5 export enterprises by volume to Korea, Nov-2025



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



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





RUBBER

SPOTLIGHT



According to the Vietnam Customs, Vietnam's rubber exports to the South Korean market recorded strong growth in November 2025 compared with both the same period last year and the previous month. Export turnover reached USD 9.73 million with a volume of 5,273 tons, up 28.5% in value and 52.2% in volume year on year. Compared with October 2025, exports also increased by 37% in value and 39.7% in volume.

This positive performance indicates a clear recovery in South Korea's demand for rubber imports, amid signs of revival in key manufacturing sectors such as automobiles, tire production, and industrial equipment. These developments support Vietnam's rubber exports toward the end of the year.

Source: Calculated from data of the Department of Customs

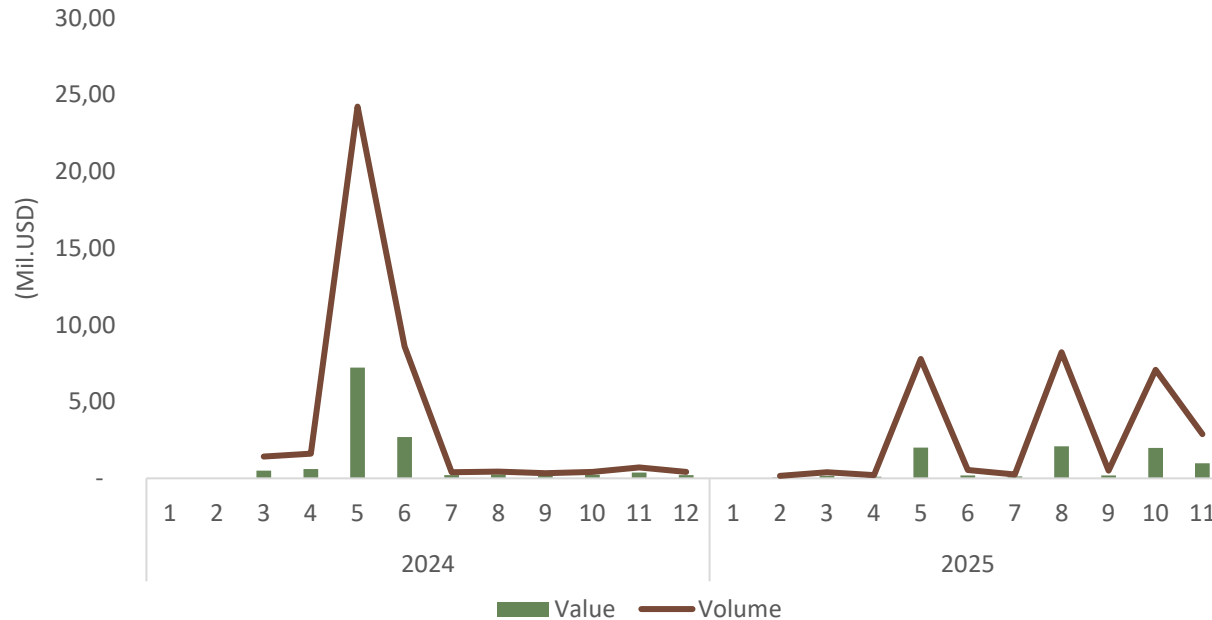


Tin liên quan



CASSAVA & CASSAVA PRODUCTS

Export volume and value to Korea, Nov-2025



Export results to Korea, Nov-2025

VALUE
0.98 Mil.USD

↘ Decrease **51%** compared to Oct-2025

↗ Increase **168%** compared to Nov-2024

↓ **0.15 Mil.USD** less than the monthly average rate in 2024

* Accumulated 11 months of 2025 reaches **7.9 tr.USD**, **63%** of total 2024

VOLUME
2.9 Ths.tons

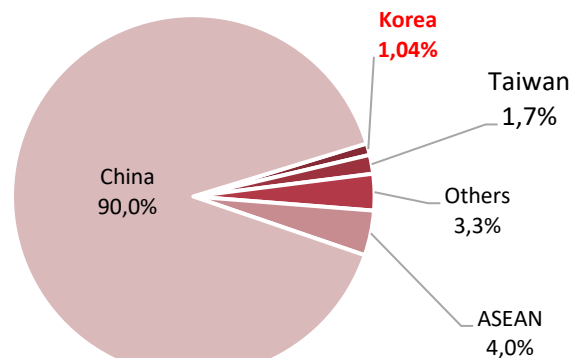
↘ Decrease **59%** compared to Oct-2025

↗ Increase **305%** compared to Nov-2024

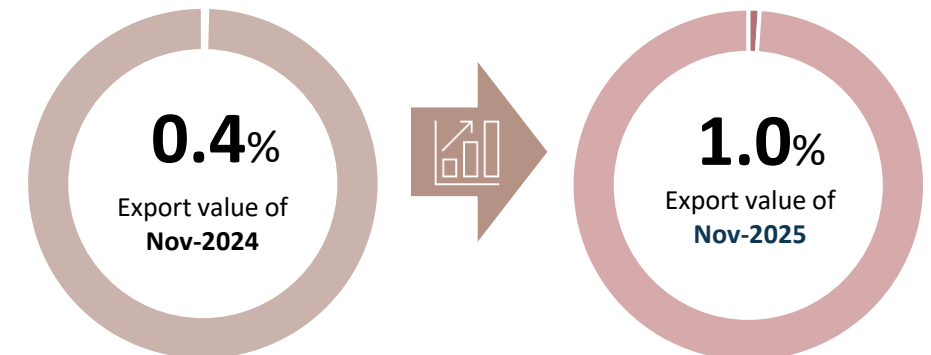
↓ **638 tons** less than the monthly average rate in 2024

* Accumulated 11 months of 2025 reaches **28 Ths.tons**, **73%** of total 2024

Percentage of export value to Korea, Nov-2025



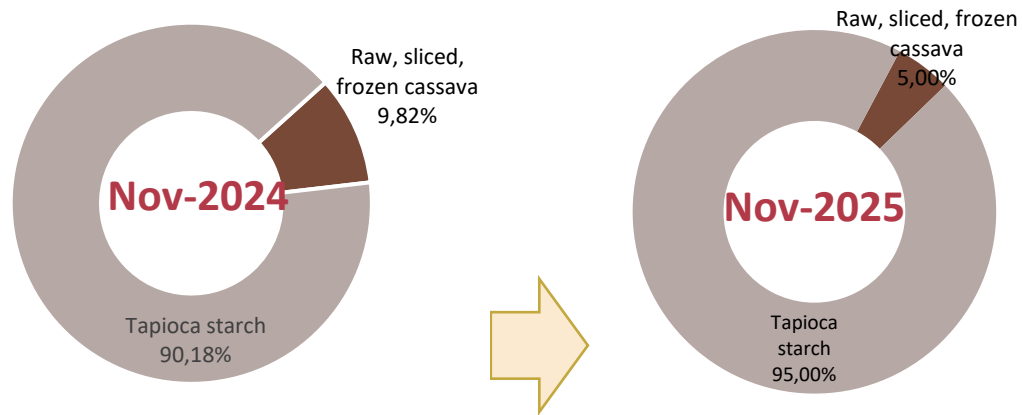
Changes in percentage of export results to Korea, Nov-2025



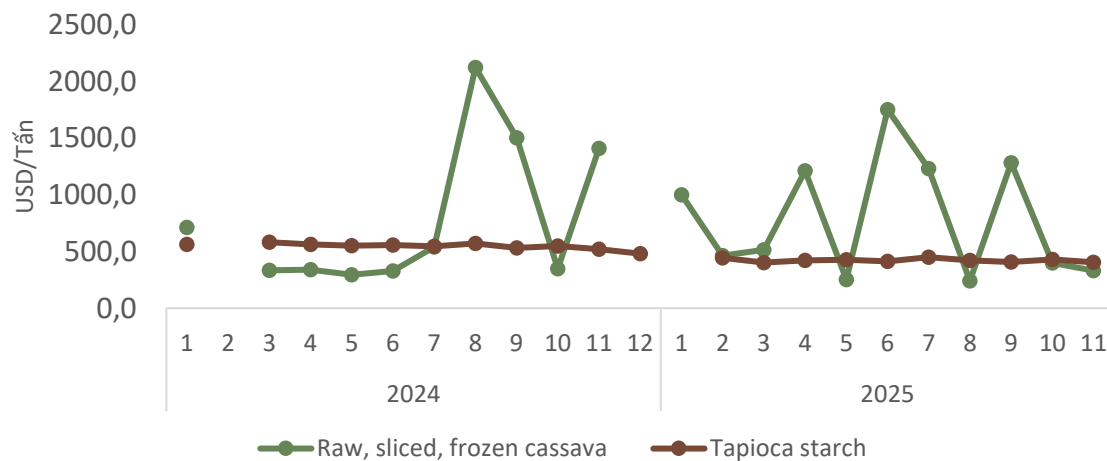


CASSAVA & CASSAVA PRODUCTS

Structure of exports by products to Korea, Nov-2025



Average export price to Korea, Nov-2025



Export results to Korea, Nov-2025



Tapioca starch

Value: **180.8** Ths.USD

Decrease **10%** compared to Oct-2025

Decrease **49%** compared to Nov-2024



Raw, sliced, frozen cassava

Value: **800.1** Ths.USD

Increase **16 time** compared to Oct-2025

Increase **73 time** compared to Nov-2024

Raw, sliced, frozen cassava

The average export price in Oct-2025 is **330** USD/tons; **decrease 17%** compared to the previous month; and **decrease 77%** compared to the same month of 2024.

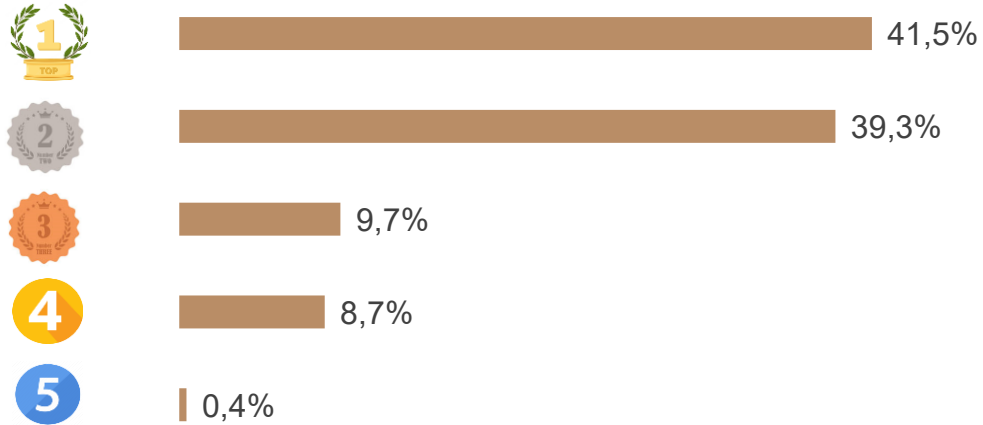
Tapioca starch

The average export price in Oct-2025 is **403** USD/tons; **decrease 6%** compared to the previous month; and **decrease 22%** compared to the same month of 2024.

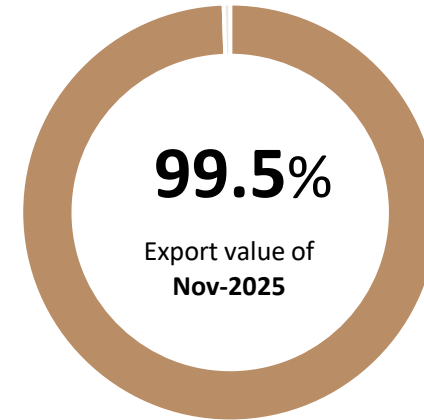


CASSAVA & CASSAVA PRODUCTS

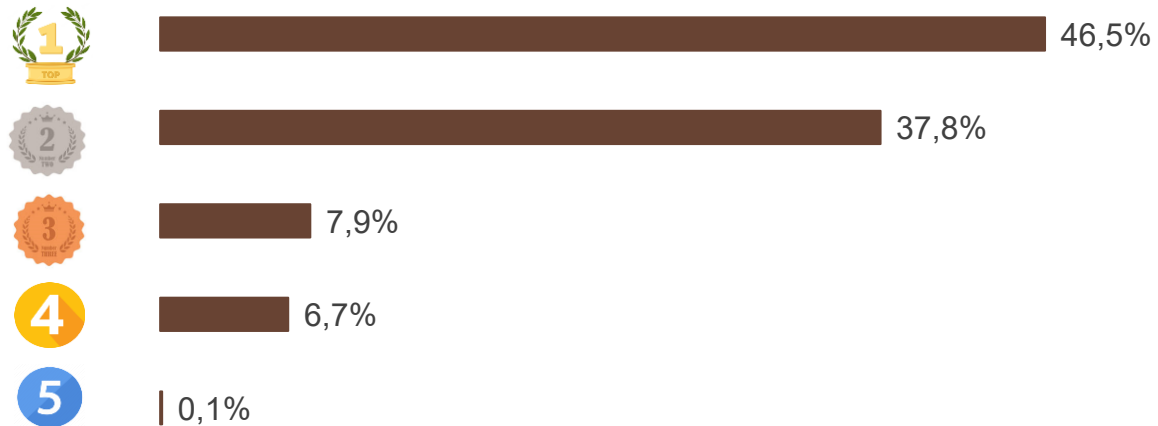
TOP 5 export enterprises by value to Korea, Nov-2025



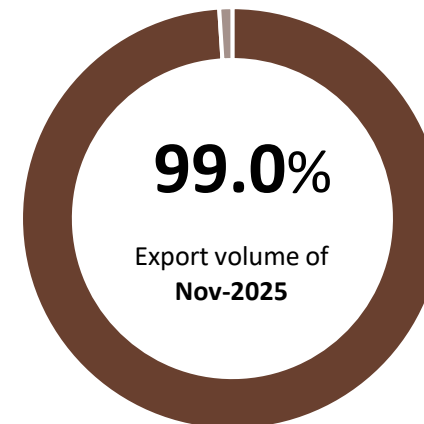
Value ratio of TOP 5 export enterprises to Korea, Nov-2025



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



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





CASSAVA & CASSAVA PRODUCTS

SPOTLIGHT

Vietnam's cassava exports to South Korea: Small scale, high volatility, and outlook in 2026

In the first eleven months of 2025, Vietnam's exports of cassava and cassava-based products to South Korea reached approximately USD 7.9 million, with a volume of about 28 thousand tons, accounting for only 0.7% of total export turnover. This proportion is the very small compared with key destinations such as China, which accounted for 92.6%. Data show that exports to South Korea fluctuated sharply on a monthly basis, with occasional spikes in May and August 2025 followed by declines, reflecting unstable demand and a heavy reliance on shipment-based orders rather than steady, regular consumption.

South Korea mainly imports cassava starch for use in the food and beverage industry and partly for the processing materials sector. In 2025, weakening domestic consumption and high production costs led South Korean enterprises to reduce inventories, resulting in lower import volumes compared with the same period in 2024 for most months in the first half of the year.

In early 2026, Vietnam's cassava exports to South Korea are unlikely to grow due to sluggish growth in food and beverage demand, reduced imports by South Korean firms, and intensifying regional competition. However, given Vietnam's price advantage and stable supply, if food safety standards and traceability requirements are well met, Vietnam may still be able to maintain stable orders from mid-2026 onward.



TIN LIÊN QUAN



Any comments. please send to:

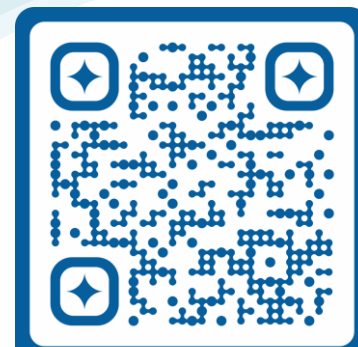
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Xem thêm báo cáo