



ISPAAE

Volume 12/2025

**MONTHLY REPORT ON
AGRI-PRODUCTS EXPORT**

FROM VIETNAM TO **ASEAN**

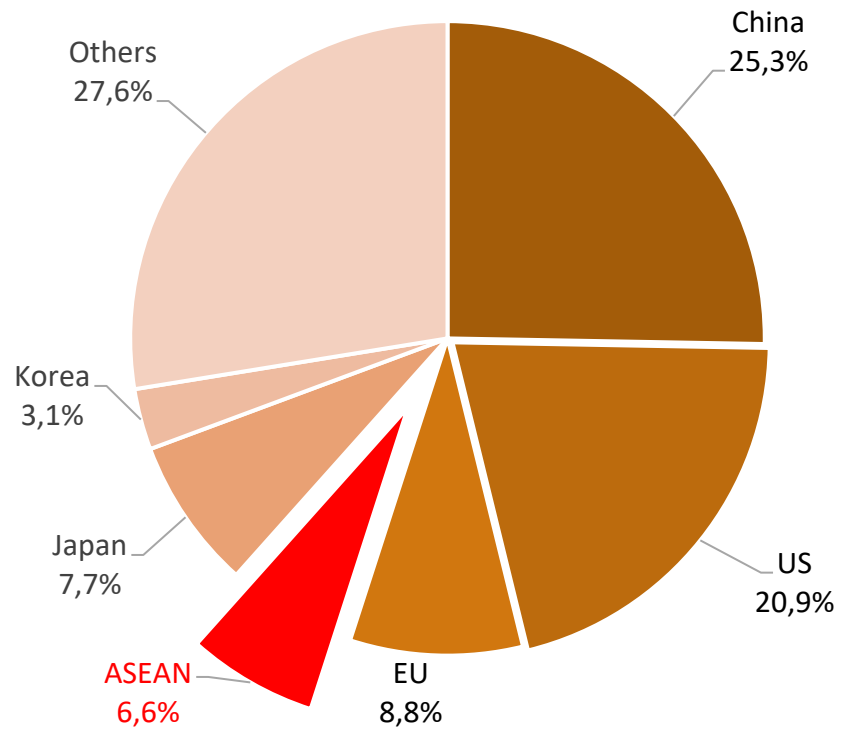


Prepared by: **AGREiNFOS**



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

Export proportion of AFF products to the ASEAN, Nov-25

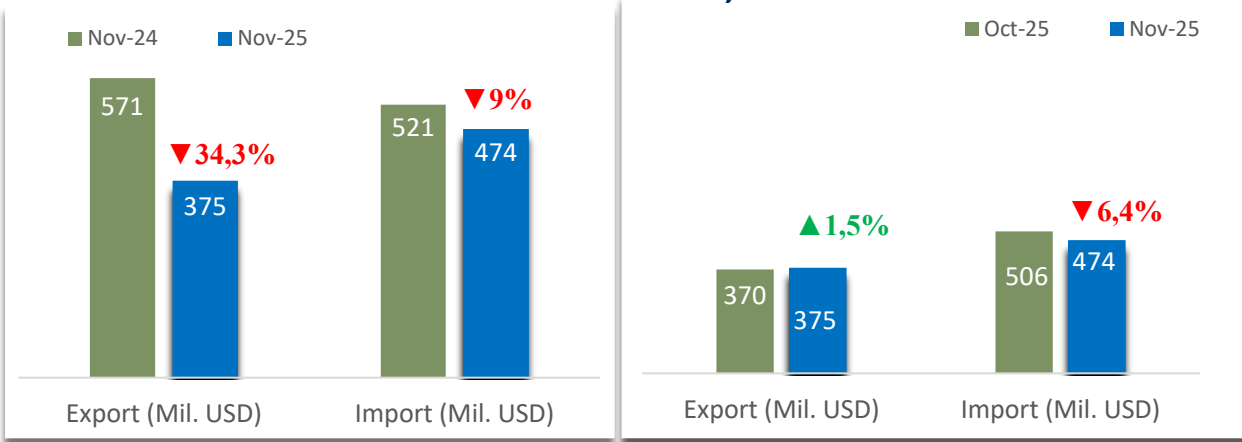


Changes in export proportion of AFF products to the ASEAN
Nov-25 compare to Oct-25 and Nov-24

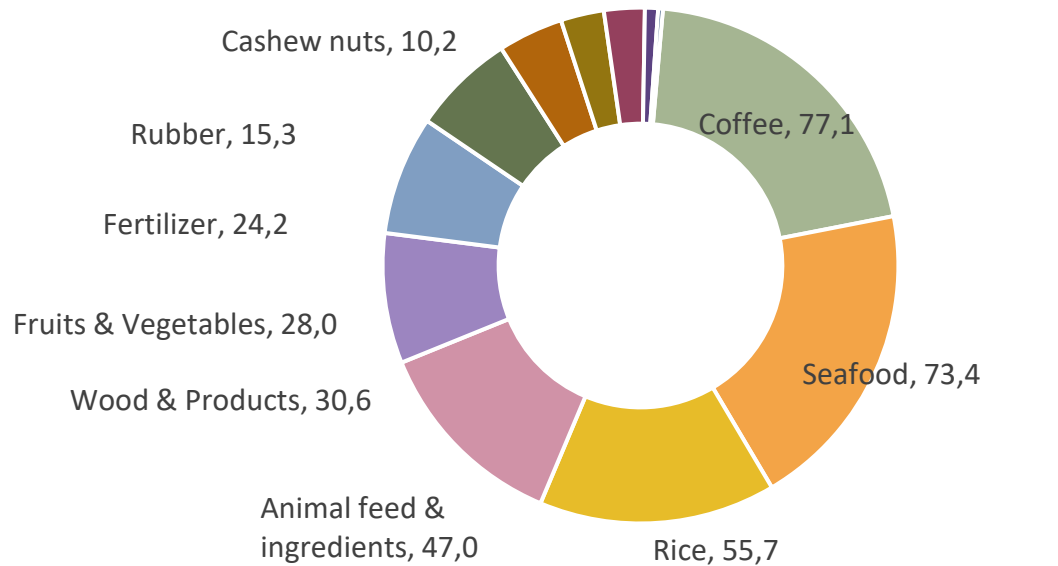
Market	Volume (Mil. USD)	Compare to Oct-25	Compare to Nov-24
China	1.431	▼ 2,2%	▲ 3,4%
US	1.182	▼ 0,6%	▼ 1,7%
EU	498	▲ 0,8%	▲ 0,9%
ASEAN	375	▲ 0,5%	▼ 4,0%
Japan	437	▲ 0,4%	▲ 1,2%
Korea	176	▼ 0,2%	▼ 0,9%
Total Export	5.658		

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

AFF products import-export turnover between Vietnam and ASEAN, Nov-25



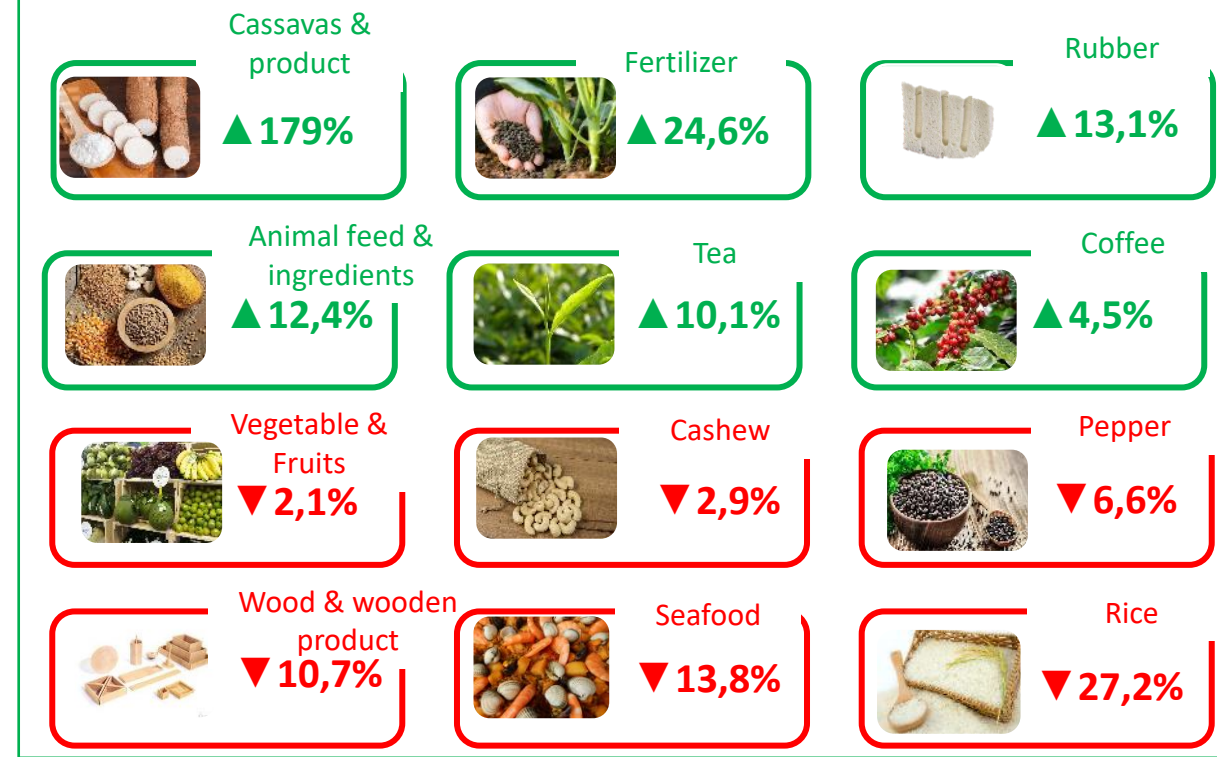
AFF products export Value to ASEAN, Nov-25



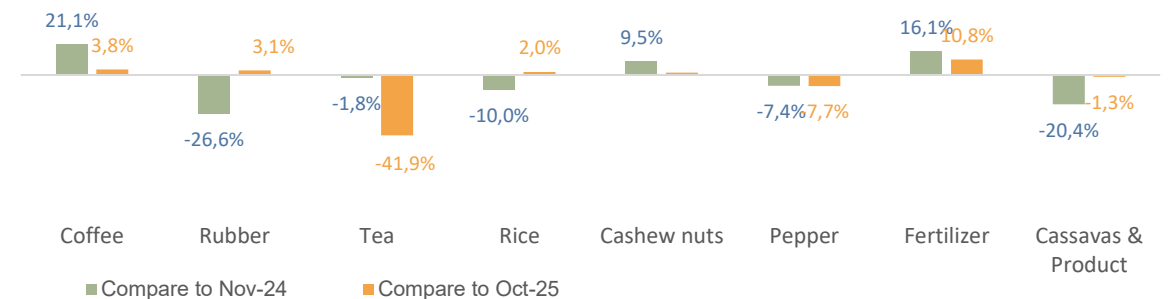
Source: Calculated from data of the Department of Customs

Unit: Mil. USD

Changes in key AFF product export Value to ASEAN in Nov-25 compare Oct-25



Changes in average export Value of key AFF products to ASEAN Nov-25 compare to Nov-24 and Oct-25



Thailand imposes a 10% tariff on cheap Chinese imported goods.

The Thailand government imposes a 10% customs duty on low-value imported goods—currently exempt from duties for shipments valued under 1,500 baht—mainly targeting low-priced products from China, starting on January 1, 2026. The measure aims to protect small and medium-sized enterprises and domestic manufacturing from the market disruptions caused by cheap imports, which have led to factory closures and job losses.

The government is expected to coordinate with e-commerce platforms to ensure more effective tax collection. According to an assessment by the law firm Tilleke & Gibbins, the new policy will have a direct impact on the e-commerce, logistics, and retail sectors, while increasing the operational burden on transport and delivery companies that must now process large volumes of parcels previously exempt from customs duties.



Source: aseanvietnam.vn

ASEAN and New Zealand upgrade to a comprehensive partnership.

ASEAN and New Zealand issued a Joint Vision Statement and upgraded their relationship to a Comprehensive Strategic Partnership after 50 years of cooperation, at a time when ASEAN continues to sustain economic growth, attract strong inflows of FDI, and expand its digital economy. The author argues that the Vision Statement—built on four pillars of Peace, Prosperity, People, and Planet—does not immediately change tariff arrangements, but instead provides long-term direction for institutional and regulatory reforms and capacity building in areas such as clean energy, sustainable agriculture, the digital economy, and human resource development.

New Zealand is regarded as a reference model for regulatory frameworks in sustainable report, agricultural certification, data governance, and clean energy licensing.

Source: aseanbriefing.com



Thailand imposes a 10% tariff on cheap Chinese imported goods.



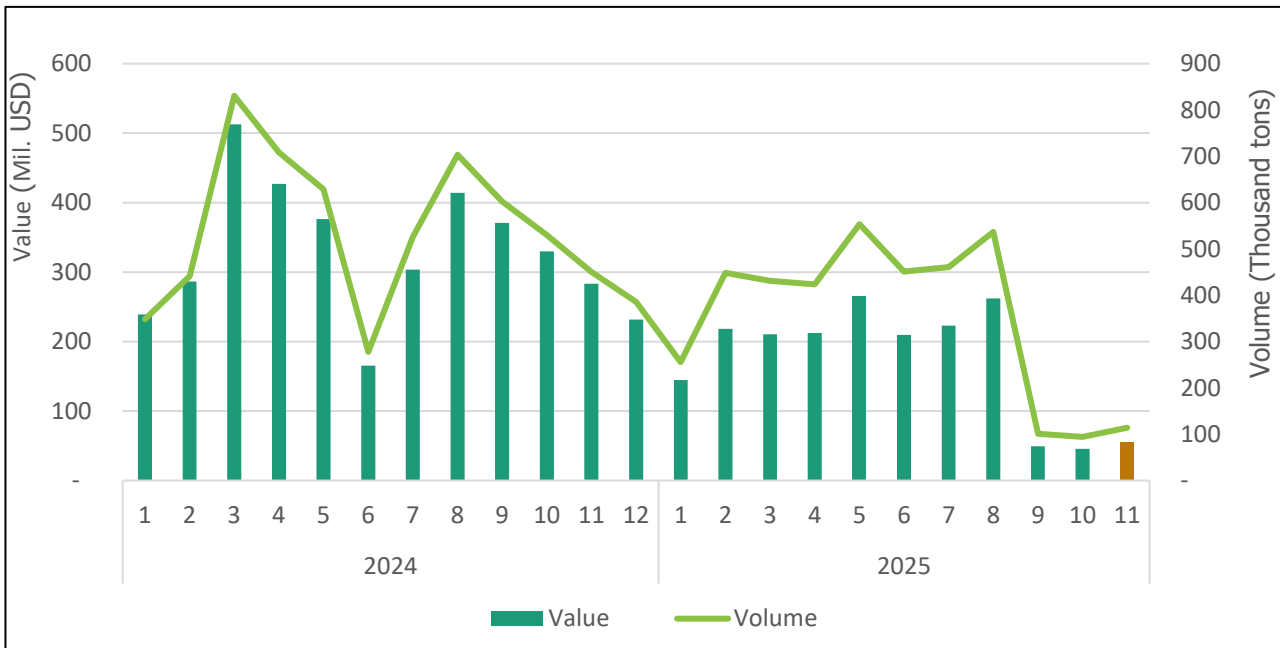
ASEAN and New Zealand upgrade to a comprehensive partnership.





RICE

Export volume and Value to ASEAN, Nov-25



Export results to ASEAN, Nov-25

Value

55,8 Mil. USD

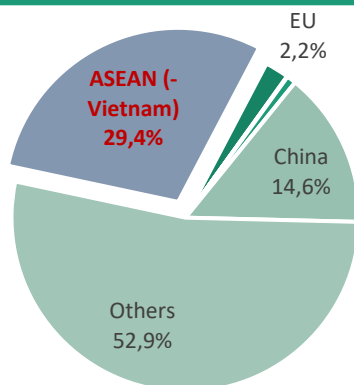
- ↗ Increase **22,8%** compare to Oct-25
- ↘ Decrease **80,3%** compare to Nov-24
- ↘ **272,5 Mil. USD** less than the monthly average rate in 2024
- ◇ Accumulated 11 months of 2025 reaches **1,8** Bil. USD, and the rate is **46,9%** of the total in 2024.

KHỐI LƯỢNG

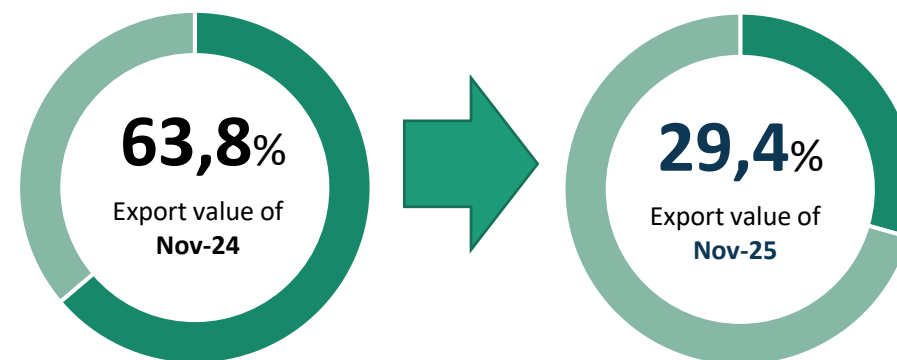
114,3 thousand tons

- ↗ Increase **21,3%** compare to Oct-25
- ↘ Decrease **74,6%** compare to Nov-24
- ↘ **421,7 thousand tons** less than the monthly average rate in 2024
- ◇ Accumulated 11 months of 2025 reaches **3,7** Mil. Tons, and the rate is **58,2%** of the total in 2024.

Percentage of export Value to ASEAN, Nov-25



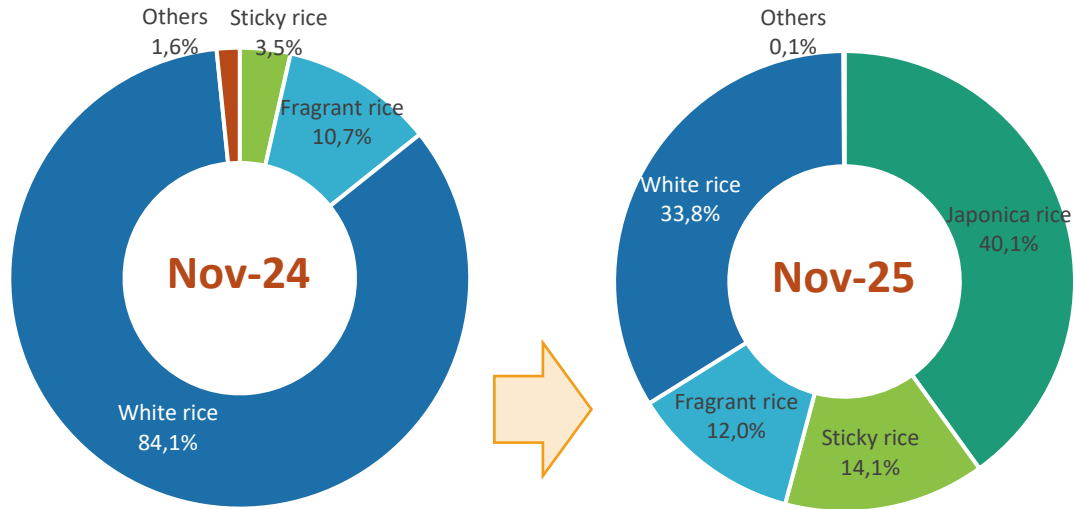
Changes in the percentage of export Value to ASEAN, Nov-25



RICE



Structure of exports by products to ASEAN, Nov-25



Export results to ASEAN, Nov-25



White rice

Value: **19,0** Mil. USD

Increase **6%** compare to Oct-25

Decrease **92%** compare to Nov-24

Sticky rice

Value : **7,9** Mil. USD

Decrease **22%** compare to Oct-25

Decrease **21%** compare to Nov-24

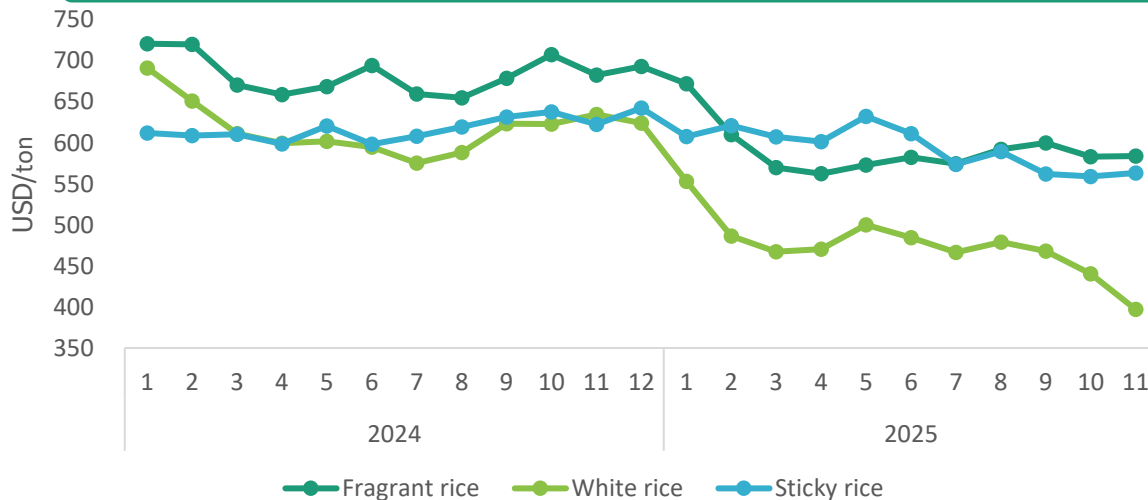
Japanica rice

Value : **22,6** Mil. USD

Increase **193%** compare to Oct-25

Increase **414%** compare to Nov-24

Average export price to ASEAN, Nov-25



Sticky rice

The average export price in Nov-25 is **563** USD/ton; **Increase 1%** compare to the previous month; and **Decrease 10%** compared to the same month in 2024.

Fragrant rice

The average export price in Nov-25 is **584** USD/ton; Unchange compare to the previous month; and **Decrease 14%** compared to the same month in 2024.

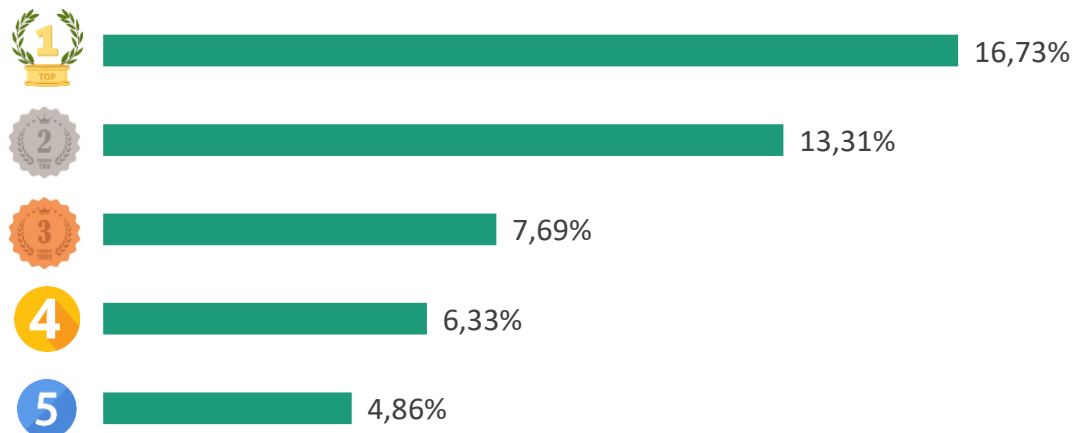
White rice

The average export price in Nov-25 is **397** USD/ton; **Decrease 10%** compare to the previous month; and **Decrease 37%** compared to the same month in 2024.

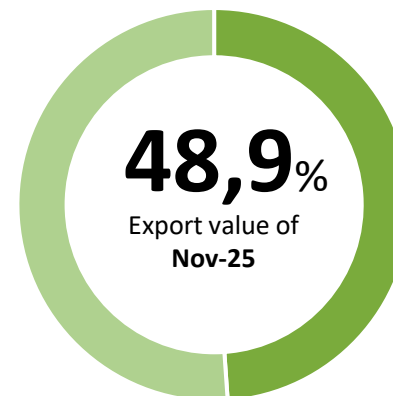


RICE

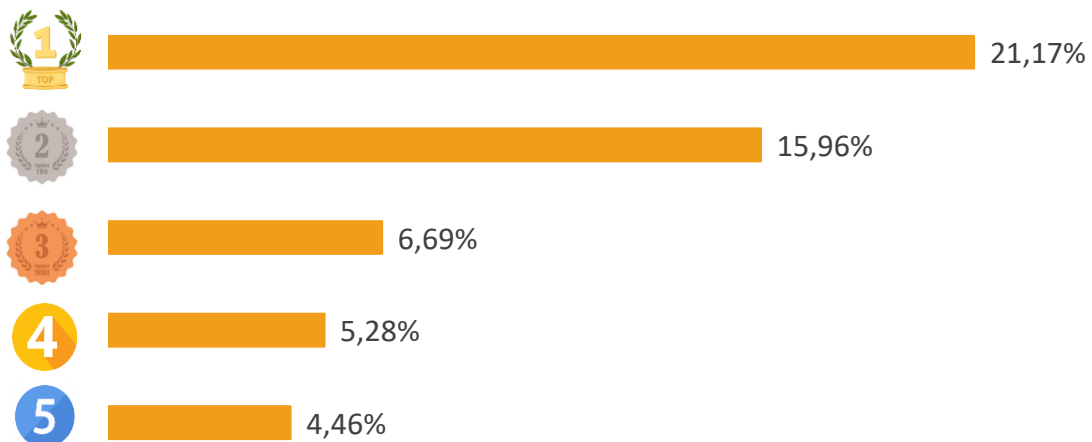
Top 5 export enterprises by Value to ASEAN, Nov-25



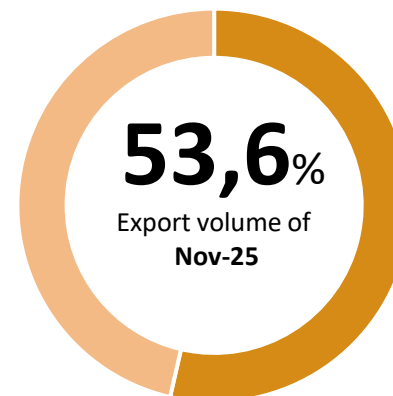
Value ratio of Top 5 export enterprise to ASEAN, Nov-25



Top 5 export enterprises by volume to ASEAN, Nov-25



Volume ratio of Top 5 export enterprise to ASEAN, Nov-25





RICE

SPOTLIGHT

01

The Philippines decided to resume import activities starting from January 1, 2026, following a temporary import suspension since September 1, 2025. According to new guidelines issued by the Bureau of Plant Industry (BPI) under the Philippine Department of Agriculture, the reopening rice import will be accompanied by very strict management measure for exporting enterprises.

In preparation for the reopening, the Bureau of Plant Department issued detailed and strict regulations. Accordingly, imports will only be allowed through 17 designated ports nationwide. Quarantine controls has been also tightened, with 100% inspection applied at the ports of Zamboanga and Tacloban, while random inspections will be conducted at other ports. One of the most critical regulations, and potentially the greatest risk for exporters, concerns delivery timelines. Specifically, all shipments must arrive at Philippine ports within 60 days from the date the Sanitary and Phytosanitary Import Clearance (SPSIS) is issued. Any shipment arriving after this deadline will be rejected and required to be returned to the exporting country.



Source: thesaigontimes.vn



RICE

SPOTLIGHT

02

The Government of Indonesia is considering a major reform of its rice price policy, proposing to apply a single nationwide maximum retail price (HET). If the plan is implemented, it would replace the current region-based pricing mechanism. According to Coordinating Minister for Food Affairs Zulkifli Hasan, one of the major weaknesses of the existing system is the very low profit margin of the State Logistics Agency (Bulog), at only IDR 50 (USD 0.003) per kilogram. At this margin, Bulog's total revenue from procuring 3 million tons of rice would be only around IDR 150 billion (USD 9.2 million), which is considered insufficient to cover transportation and distribution costs to remote areas such as Papua and Maluku.

At present, the maximum retail price for rice varies by region: medium-grade rice is set at about IDR 13,500 (USD 0.83)/kg in Java and Sulawesi, IDR 14,000 (USD 0.86)/kg in Sumatra and Kalimantan, and as high as IDR 15,500 (USD 0.95)/kg in Maluku and Papua. To address this issue, the government plans to review Bulog's margin structure in consultation with the Financial and Development Supervisory Agency (BPKP). Adopting a single nationwide price is expected to create a fairer and more effective mechanism, helping to ensure stability in the food supply chain across the archipelago.

Source: en.tempo.co



TIN LIÊN QUAN



FRUITS AND VEGETABLES (EXPORT)

Export value to the ASEAN, Nov-25



Export results to the ASEAN, Nov-25

Value
28,9
Mil. USD

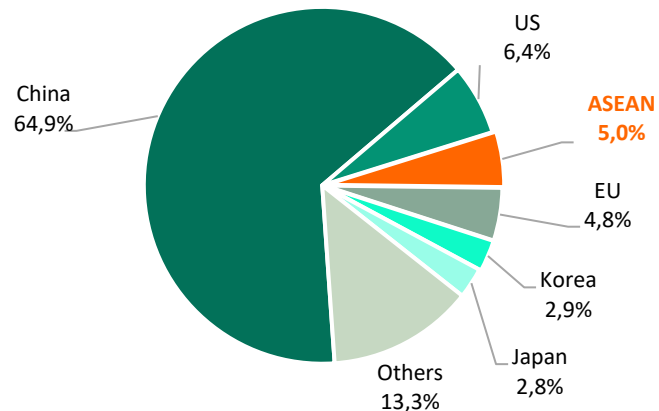
Increase **10,7%** compare to Oct-25

Decrease **28,0%** compare to Nov-24

1,1 Mil. USD less than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **324,6 Mil. USD**, and the rate is **74,3%** of the total in 2024.

Percentage of export value to the ASEAN, Nov-25



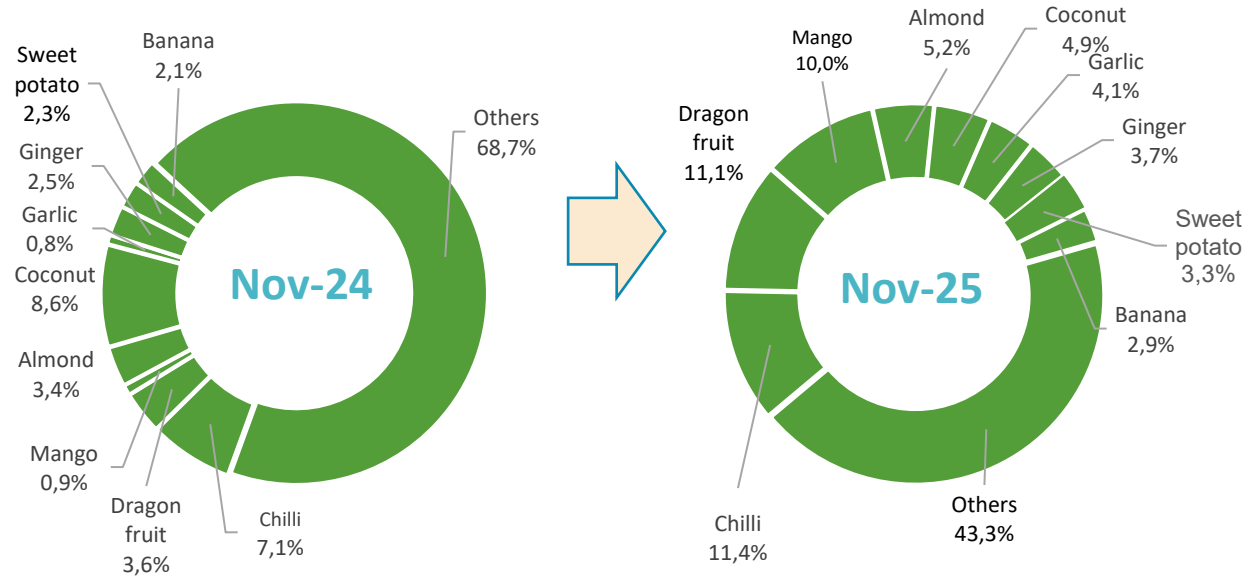
Changes in percentage of export value to the ASEAN, Nov-25





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Nov-25



Export results to the ASEAN, Nov-25



Chillis

Value: **4,0** Mil. USD

Increase **8,4%** compare to Oct-25

Increase **16,3%** compare to Nov-24



Dragon fruit

Value : **3,9** Mil. USD

Increase **2,6%** compare to Oct-25

Increase **121,7%** compare to Nov-24



Mango

Value : **3,5** Mil. USD

Decrease **42,4%** compare to Oct-25

Increase **722,4%** compare to Nov-24



Almond

Value : **1,8** Mil. USD

Increase **16,6%** compare to Oct-25

Increase **11,4%** compare to Nov-24



Coconut

Value : **1,7** Mil. USD

Increase **20,5%** compare to Oct-25

Decrease **59,4%** compare to Nov-24



Garlic

Value : **1,4** Mil. USD

Decrease **16,9%** compare to Oct-25

Increase **277,2%** compare to Nov-24



Ginger

Value : **1,3** Mil. USD

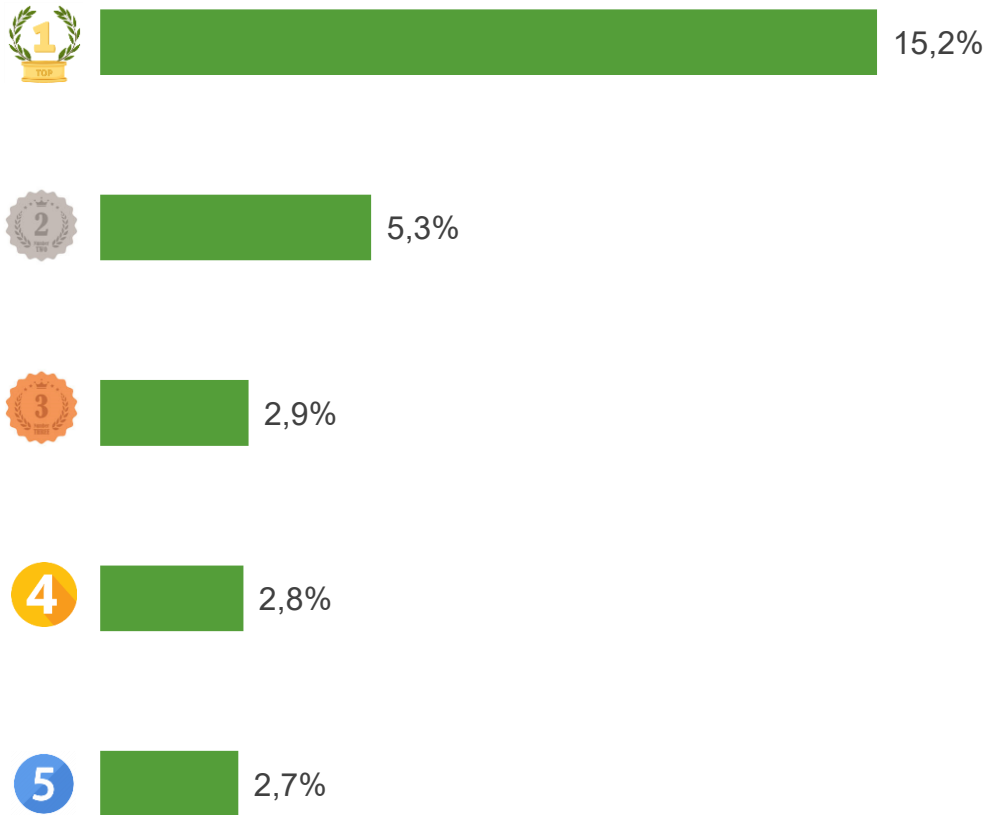
Increase **646,1%** compare to Oct-25

Increase **5,6%** compare to Nov-24

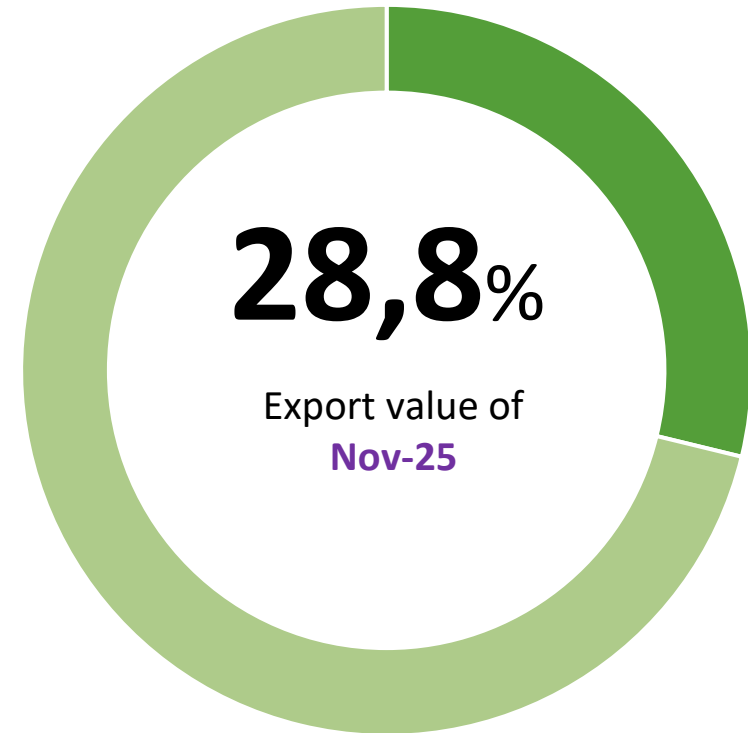


FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Nov-25



Value ratio of TOP 5 export enterprises to the ASEAN, Nov-25



FRUITS AND VEGETABLES (IMPORT)

Import value to the ASEAN, Nov-25



Import results to the ASEAN, Nov-25

Value



31,8

Mil. USD

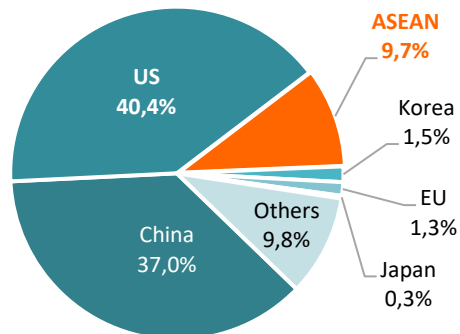
Decrease **24,0%** compare to Oct-25

Increase **23,7%** compare to Nov-24

6,0 Mil. USD more than the monthly average rate in 2024

Accumulated 11 months of 2025 reaches **396,2 Mil. USD**, and the rate is **128,1%** of the total in 2024.

Percentage of import value to the ASEAN, Nov-25



Changes in percentage of import value to the ASEAN, Nov-25

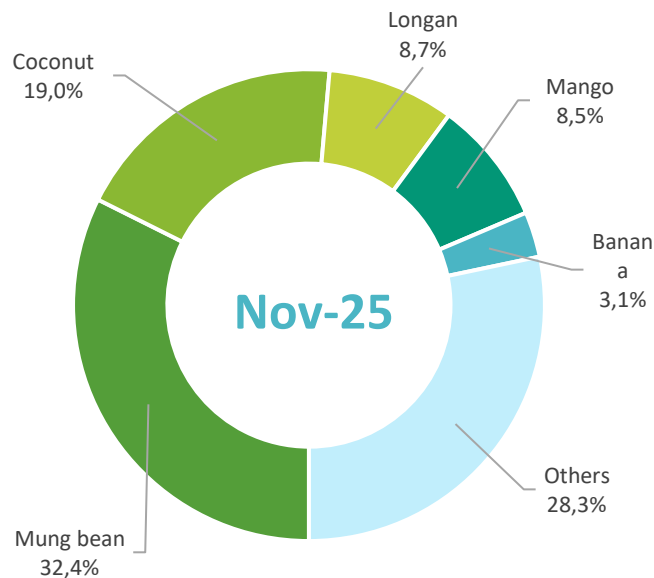
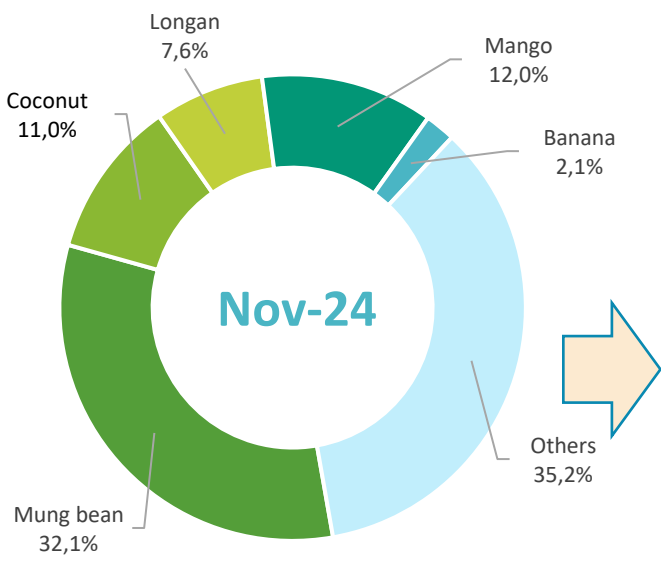




FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Nov-25

Import results from the ASEAN, Nov-25



Mung beans

Value: **10,3** Mil. USD

Decrease **7,0%** compare to Oct-25

Increase **24,7%** compare to Nov-24



Coconut

Value : **6,0** Mil. USD

Decrease **48,3%** compare to Oct-25

Increase **114,7%** compare to Nov-24



Longan

Value : **2,8** Mil. USD

Increase **44,8%** compare to Oct-25

Increase **41,9%** compare to Nov-24



Mango

Value : **2,7** Mil. USD

Decrease **16,4%** compare to Oct-25

Decrease **12,3%** compare to Nov-24



Banana

Value : **0,99** Mil. USD

Increase **12,5%** compare to Oct-25

Increase **82,2%** compare to Nov-24

Philippines implements the banana sector support plan for 2025

The Philippines announced a 2025 support plan for its banana sector, including the distribution of more than 100,000 seedlings, 120,000 units of organic fertilizer, and 215,000 biological products to improve plant resistance, as Panama disease (TR4) has damaged 15,500 hectares in the Davao region. The country's export position is weakening as Vietnam becomes the leading supplier to China, while Philippine bananas face high tariffs in Japan. The government is calling for closer cooperation with businesses to stabilize production and strengthen global competitiveness.

Source: Fructidor.com

Indonesia exports the first shipment of frozen durian to China

On December 15, 2025, Indonesia exported its first shipment of frozen durian, weighing 48 tons, to China. The shipment was valued at 5.1 billion Indonesian rupiah (approximately USD 304,000). It was transported from Tanjung Priok Port in Jakarta to Qingdao Port in China. Eligible frozen durian products include purée, pulp, and whole fruit, processed from fresh durians sourced from West Java and Central Sulawesi.

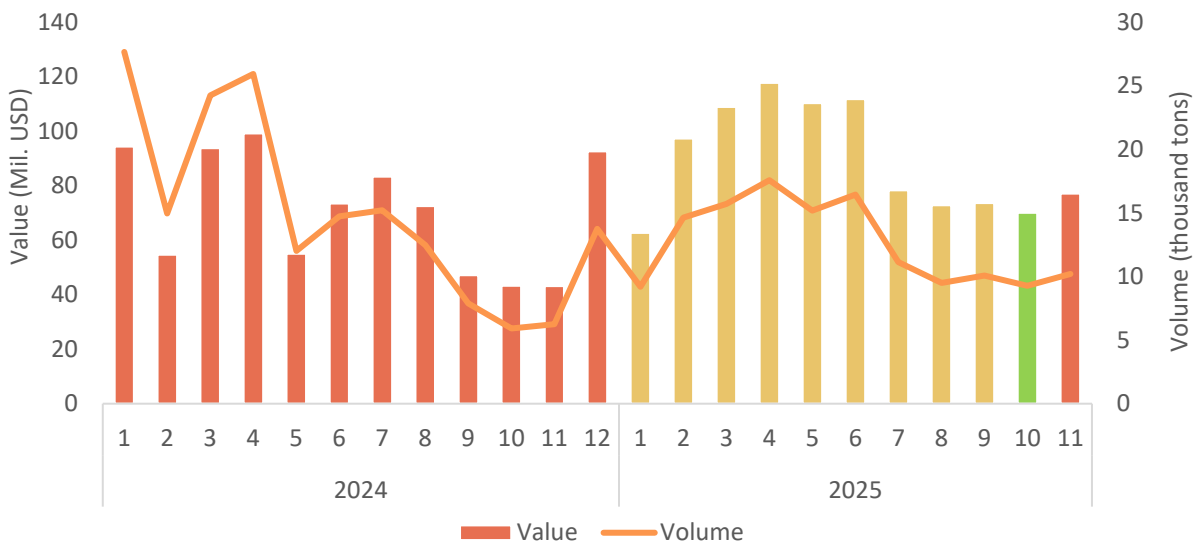
Indonesia exported a total of 10,162 tons of durian products during the first 11 months of 2025, with key markets including China, Thailand, Malaysia, and Hong Kong. Previously, frozen durian had to be shipped via Thailand, but direct exports to China now help save about USD 8,000 per container in logistics costs.

Source: Guojiguoshu.com



COFFEE

Export volume and value to ASEAN, Nov-25



Export results to ASEAN, Nov-25

VALUE

77,1 Mil. USD

↗ Increase **10,1%** compare to Oct-25

↗ Increase **78,8%** compare to Nov-24

↗ **6,1** Mil. USD more than the monthly average rate in 2024.

❖ Accumulated 1 months of 2025 reaches **980,3** Mil.USD, and the rate is **115%** of the total in 2024.

VOLUME

10,2 thousand tons

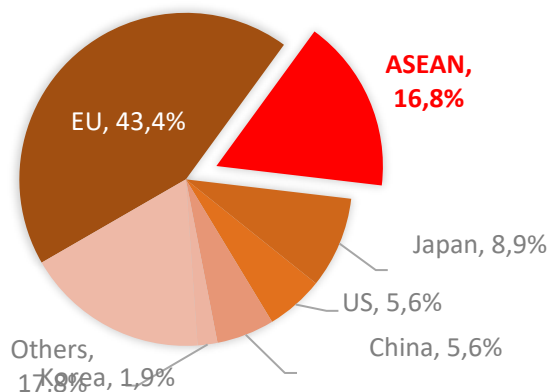
↗ Increase **9,8%** compare to Oct-25

↗ Increase **63,3%** compare to Nov-24

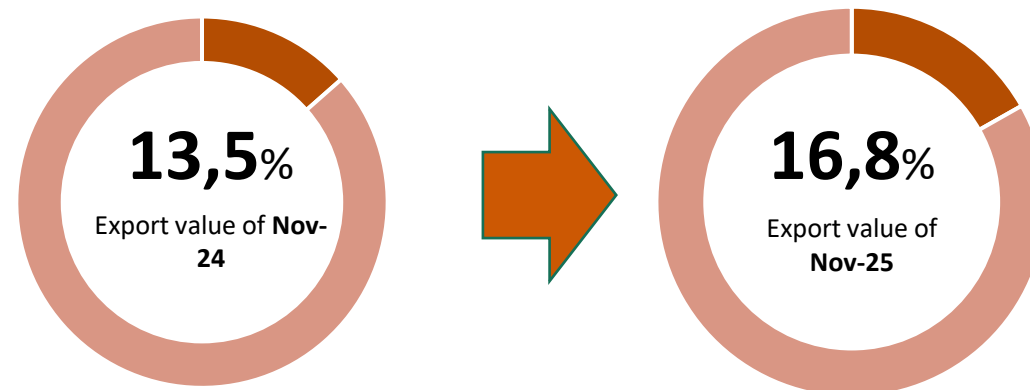
↘ **4,9** thousand tons less than the monthly average rate in 2024.

❖ Accumulated 11 months of 2025 reaches **138,9** thousand tons, and the rate is **76,8%** of the total in 2024.

Percentage of export value to ASEAN, Nov-25



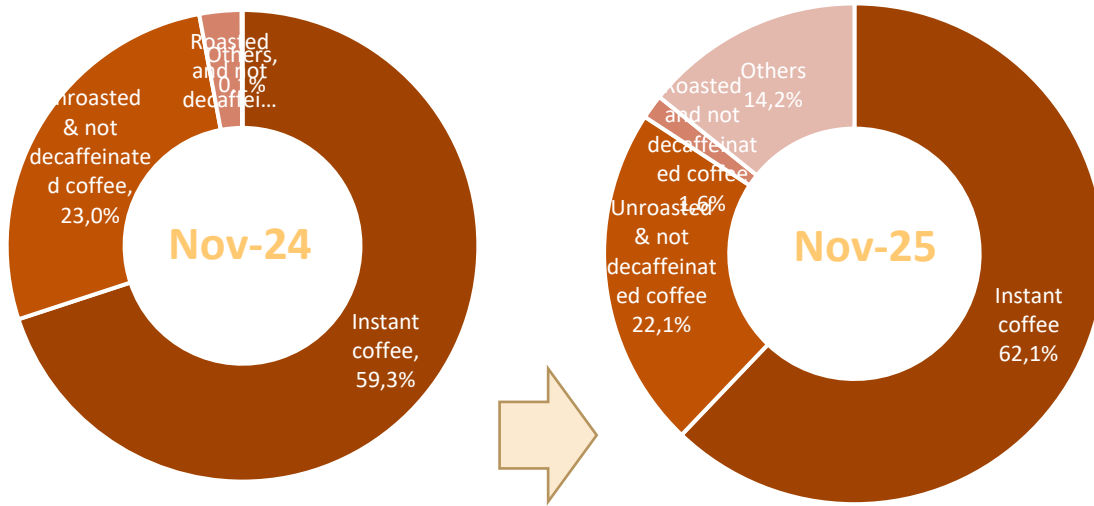
Changes in percentage of export value to ASEAN, Nov-25



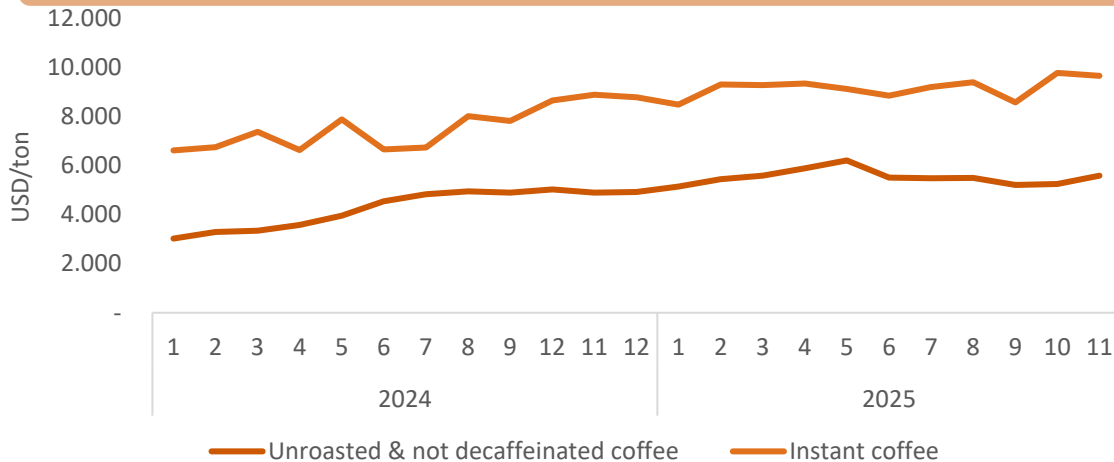


COFFEE

Structure of exports by products to ASEAN, Nov-25



Average export price to ASEAN, Nov-25



Export results to ASEAN, Nov-25



Unroasted & not decaffeinated coffee

Value: **17,2** Mil. USD

Increase **85%** compare to Oct-25

Increase **14,9%** compare to Nov-24



Instant coffee

Value: **48,3** Mil. USD

Increase **29,9%** so compare to Oct-25

Increase **130,1%** compare to Nov-24



Others

Value: **11,1** Mil. USD

Decrease **37,5%** compare to Oct-25

Increase **76,8%** compare to Nov-24

Instant coffee

The average export price in Nov-25 is **9.187** USD/ton, **Decrease 1,3%** compare to the previous month, and **Increase 6,4%** compare to the same month in 2024.

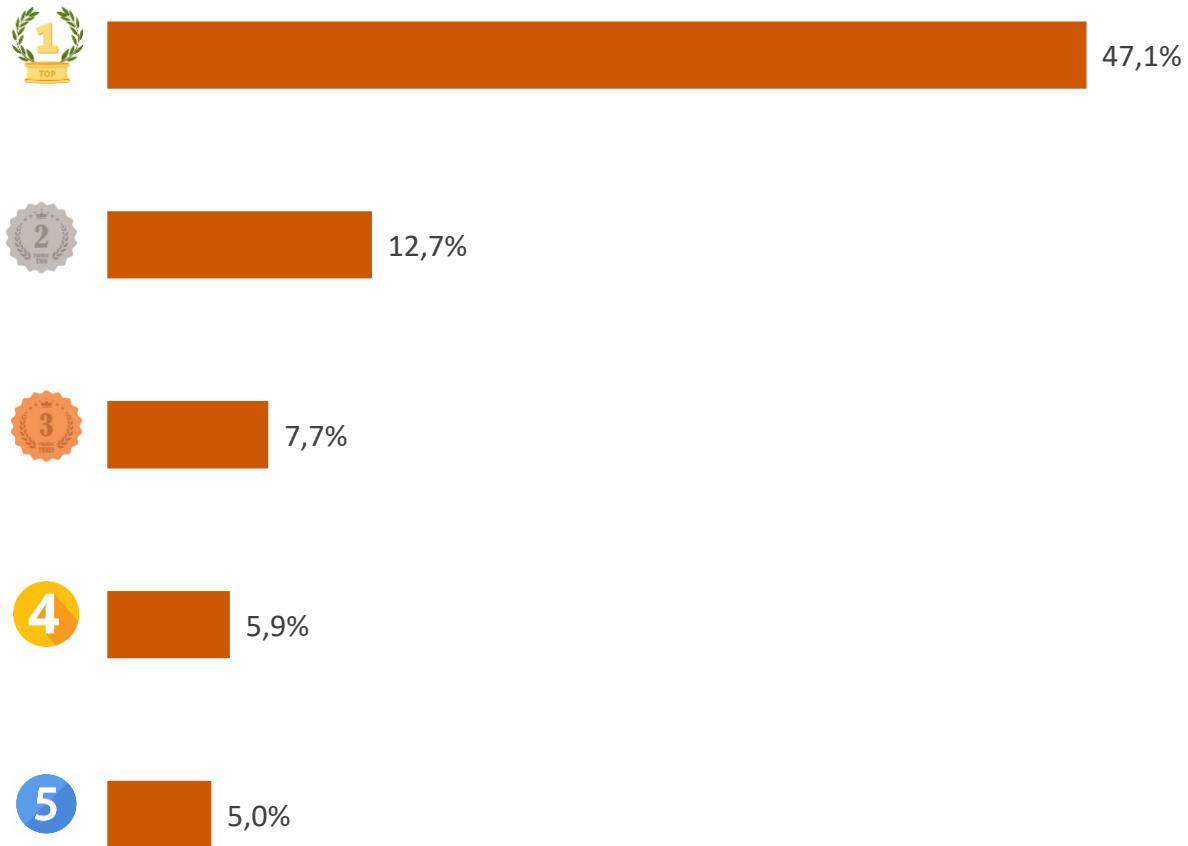
Unroasted & not decaffeinated coffee

The average export price in Nov-25 is **5.572** USD/Ton; **Increase 8,6%** compare to the previous month, and **Increase 14%** compare to the same month in 2024.

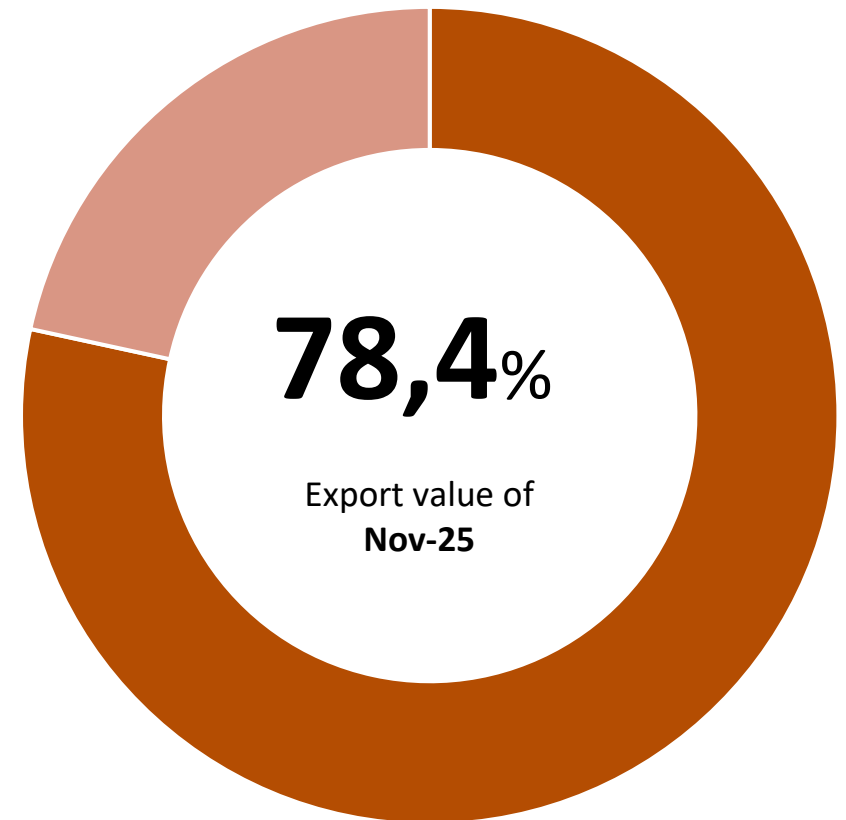


COFFEE

TOP 5 export enterprises by value to ASEAN, Nov-25



Value ratio of TOP 5 export enterprises to ASEAN, Nov-25





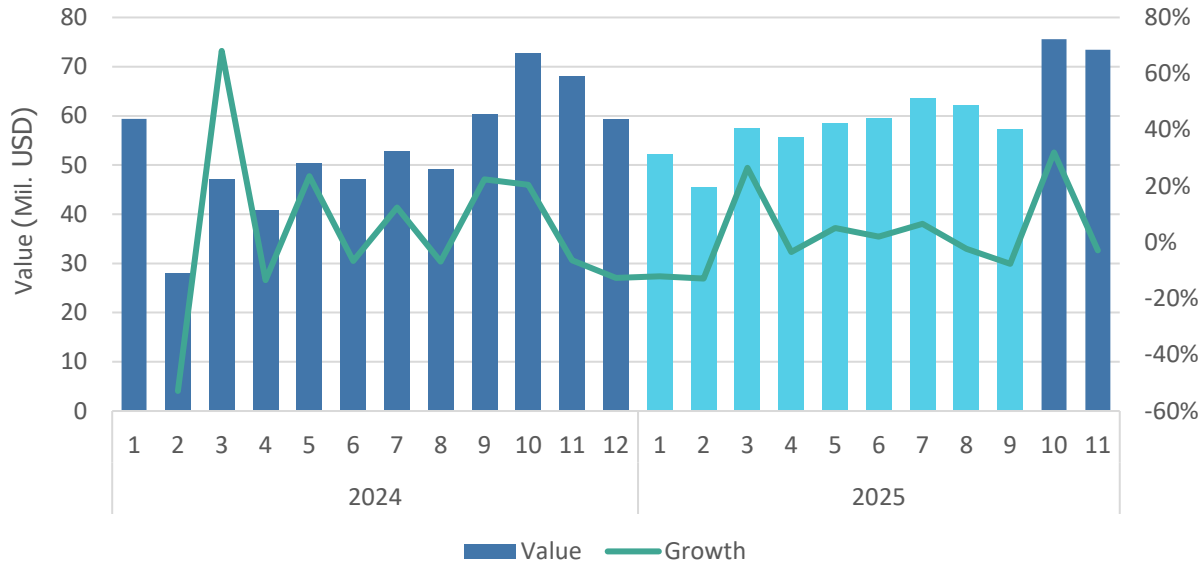
In the 2025/2026 coffee crop season (from April 2025 to March 2026), Indonesia's production is about 12.60 million bags, mainly Robusta at 10.90 million bags, while Arabica is about 1.70 million bags. Cumulative exports are forecast at 7.80 million bags, up 27.14% compared with the previous season. Domestic coffee consumption is about 4.81 million bags, supported significantly by imports, with Brazil and Vietnam accounting for a large share. However, heavy rainfall and flooding caused by tropical storms are causing serious damage to infrastructure and logistics chains, particularly in Arabica-growing areas of Sumatra and Aceh, increasing the risk of shipment delays. In this context, the outlook for the 2026/27 coffee season should continue to be monitored and assessed with caution.





FISHERIES

Export value to ASEAN, Nov-25



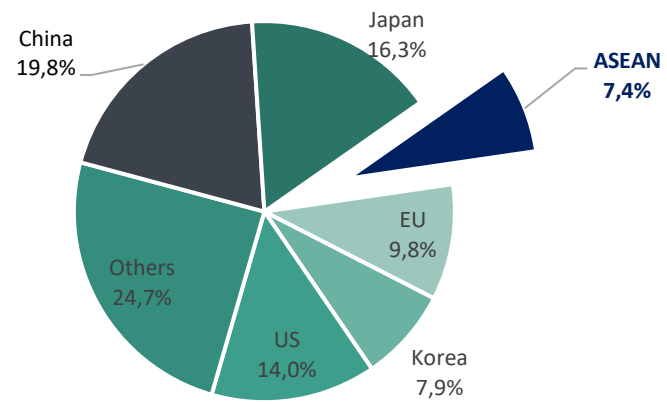
Export results to ASEAN, Nov-25

VALUE

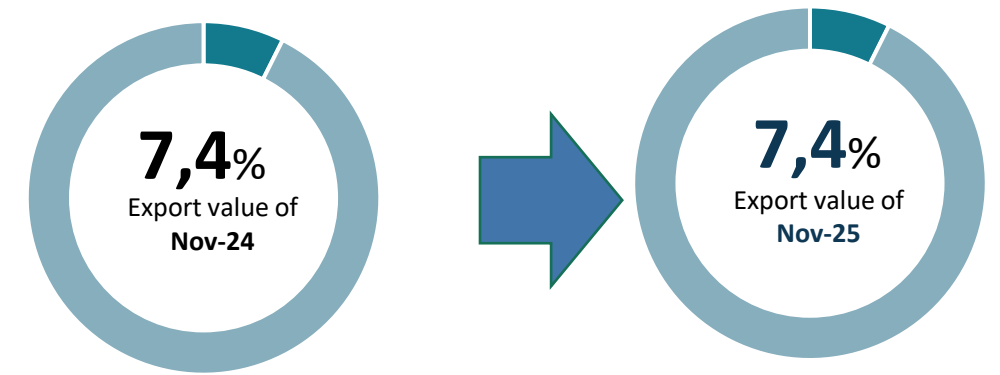
↓ Decrease **2,9%** compare to Oct-25
 ↗ Increase **8,1%** compare to Nov-24
 ▲ **20,5 Mil. USD** more than the monthly average rate in 2024
 ◆ Accumulated 11 months of 2025 reaches **660,3 Mil. USD**, and the rate is **104,0%** of the total in 2024.

73,4 Mil. USD

Percentage of export value to ASEAN, Nov-25



Change in percentage of export to ASEAN, Nov-25

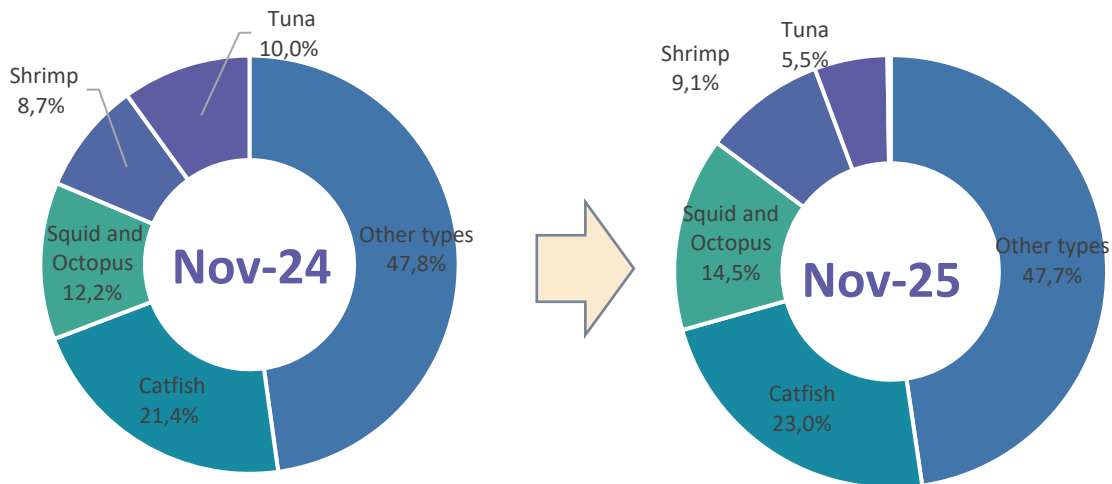


Source: Calculated from data of the Department of Customs

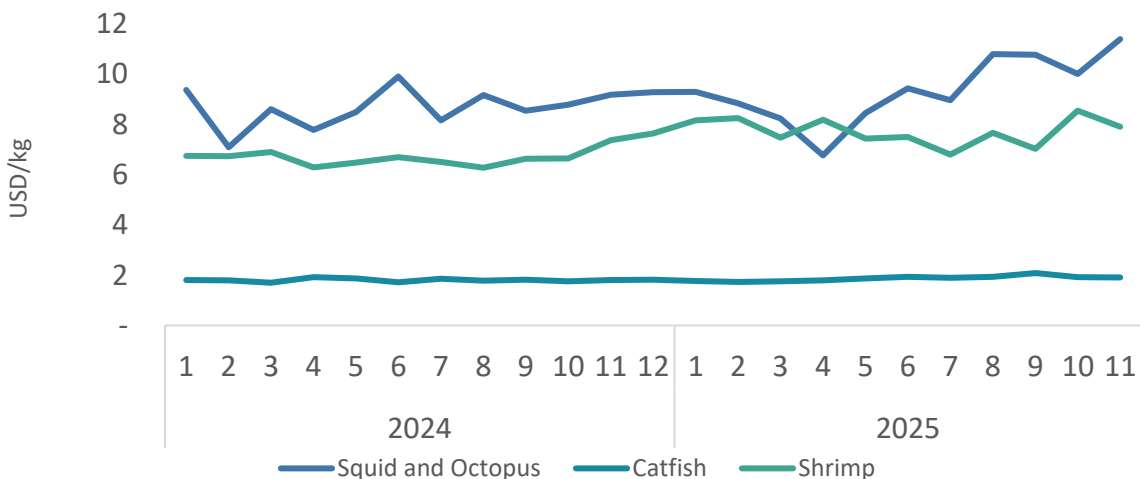
FISHERIES



Structure of exports by products to ASEAN, Nov-25



Average export price to ASEAN, Nov-25



Export results to ASEAN, Nov-25



Catfish

Value: **16,9** Mil. USD

Increase **3,9%** compare to Oct-25

Increase **16,0%** compare to Nov-24



Squid & Octopus

Value: **10,7** Mil. USD

Increase **1,1%** compare to Oct-25

Increase **29,1%** compare to Nov-24



Shrimp

Value: **6,7** Mil. USD

Decrease **17,3%** compare to Oct-25

Increase **10,8%** compare to Nov-24

Squid & Octopus

The average export price in Nov-25 is **11,4** USD/kg; Increase **11,4%** compare to the previous month; and Increase **24,1%** compare to the same month in 2024.

Catfish

The average export price in Nov-25 is **1,9** USD/kg; Decrease **0,7%** compare to the previous month; and Increase **5,8%** compare to the same month in 2024.

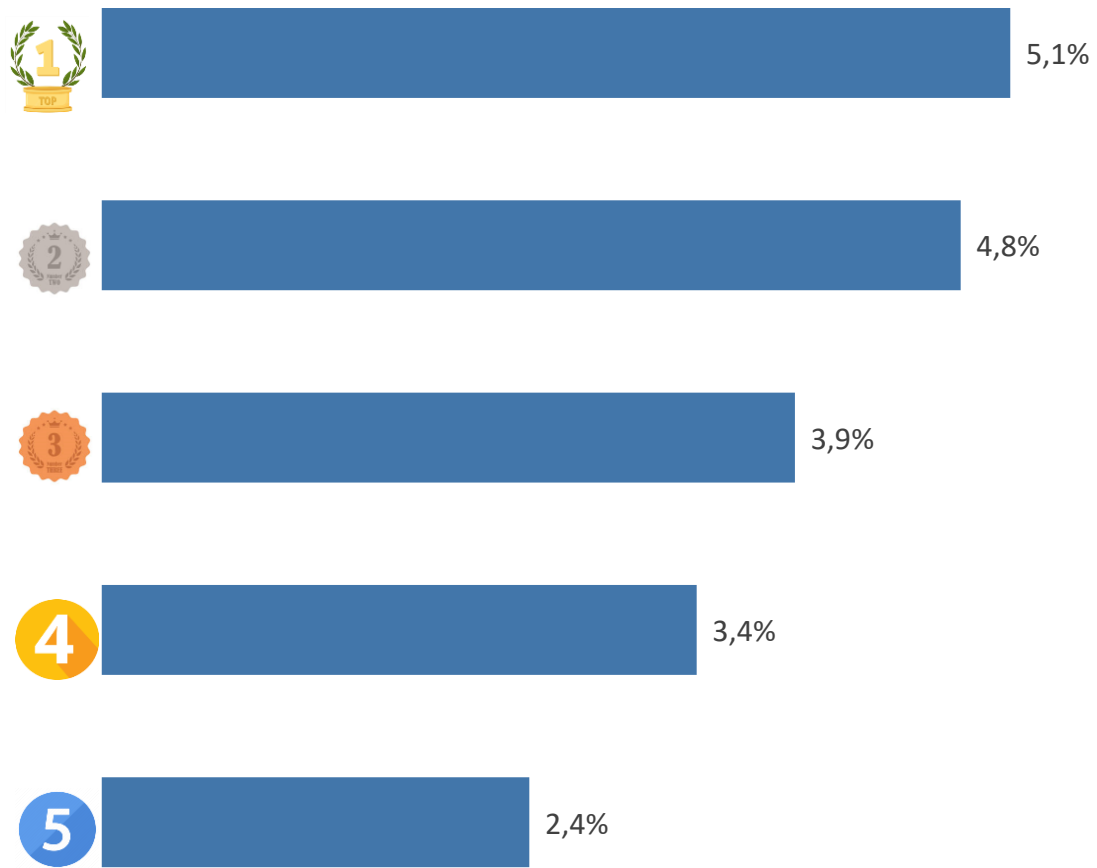
Shrimp

The average export price in Nov-25 is **7,9** USD/kg; Decrease **7,4%** compare to the previous month; and Increase **7,3%** compare to the same month in 2024.

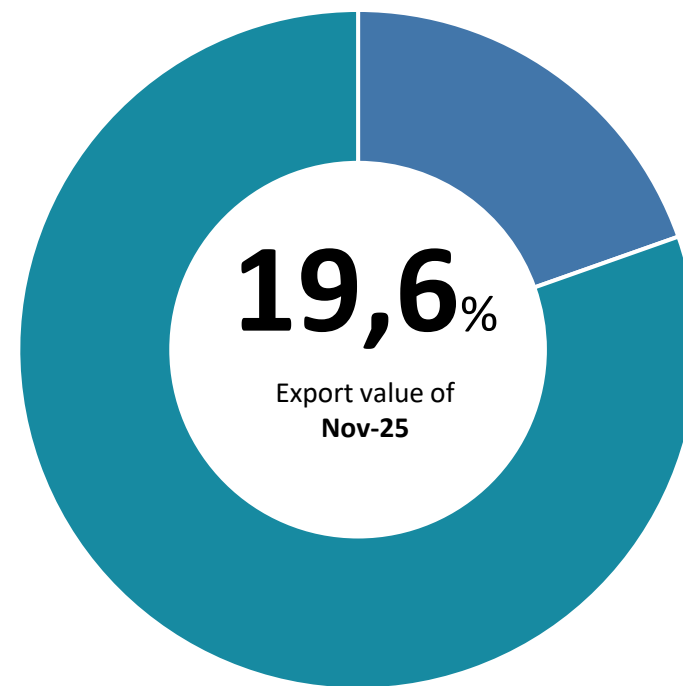


FISHERIES

TOP 5 export enterprises by value to ASEAN, Nov-25



Value ratio of TOP 5 export enterprises to ASEAN, Nov-25



01

Indonesian shrimp is recalled due to concerns about radioactive contamination.

The U.S. Food and Drug Administration (FDA) expanded a recall of shrimp imported from Indonesia over concerns of contamination with radioactive Cesium-137 (Cs-137), extending a series of incidents that began in August 2025. According to the FDA, Direct Source Seafood (Washington state) recalls about 83,800 bags of frozen and raw shrimp due to concerns that the products may have been processed, packaged, or stored under conditions that could have exposed them to Cs-137.

The affected products include 1-pound bags under the Market 32 brand sold at Price Chopper stores across several Northeastern states from July 11, 2025, and 2-pound bags under the Waterfront Bistro brand distributed through Jewel-Osco, Albertsons, Safeway, and Lucky Supermarket across multiple Midwestern and Western states from June 30, 2025. The FDA advises consumers not using the products and to discard them or return them to the place of purchase for a refund. The incident is believed to have originated from a steel plant near the supply source in Indonesia, prompting the United States to raise import alerts. Although Indonesian shrimp was allowed back into the U.S. market from late October 2025, exports in October still fell by 59% compared to the same period last year



Source: Vasep



Tin liên quan



WOOD & WOODEN PRODUCTS

Export volume and value to ASEAN, Nov-25



Export results to ASEAN, Nov-25

VALUE



31

Mil. USD

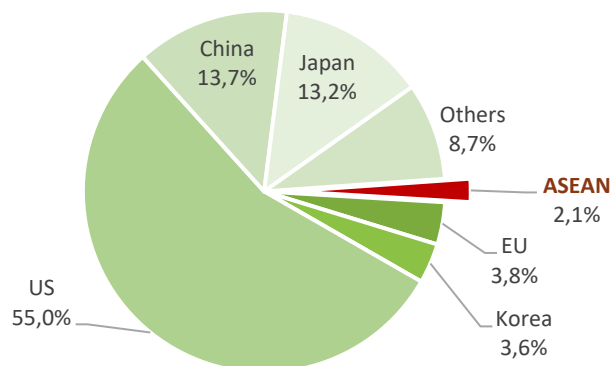
Decrease **10,7%** compare to Oct-25

Decrease **6,3%** compare to Nov-24

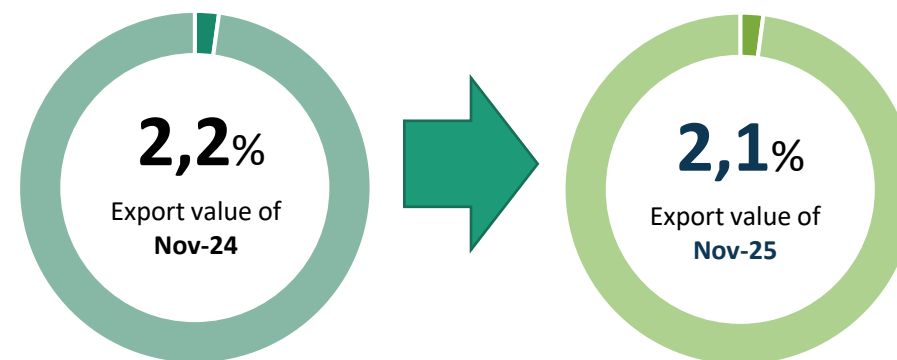
↑ **3,2 Mil. USD** more than the monthly average rate in 2024

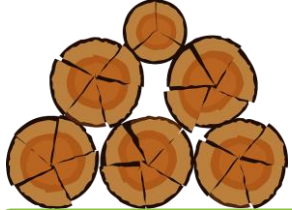
Accumulated 11 months of 2025 reaches **334,3 Mil. USD**, and the rate is **101,7%** of the total in 2024

Percentage of export value to ASEAN, Nov-25



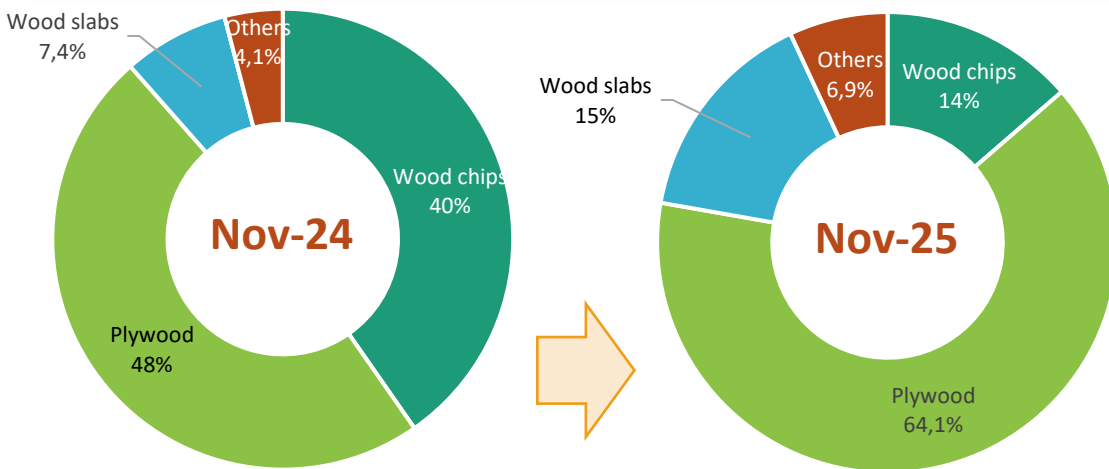
Changes in percentage of export value to ASEAN, Nov-25





WOOD & WOODEN PRODUCTS

Structure of exports by products to ASEAN, Nov-25



Export results to ASEAN, Nov-25



Plywood

Value: **21,1** Mil. USD

Decrease **14%** compare to Oct-25

Decrease **13%** compare to Nov-24



Wood chips

Value: **4,5** Mil. USD

Decrease **71%** compare to Oct-25

Decrease **78%** compare to Nov-24



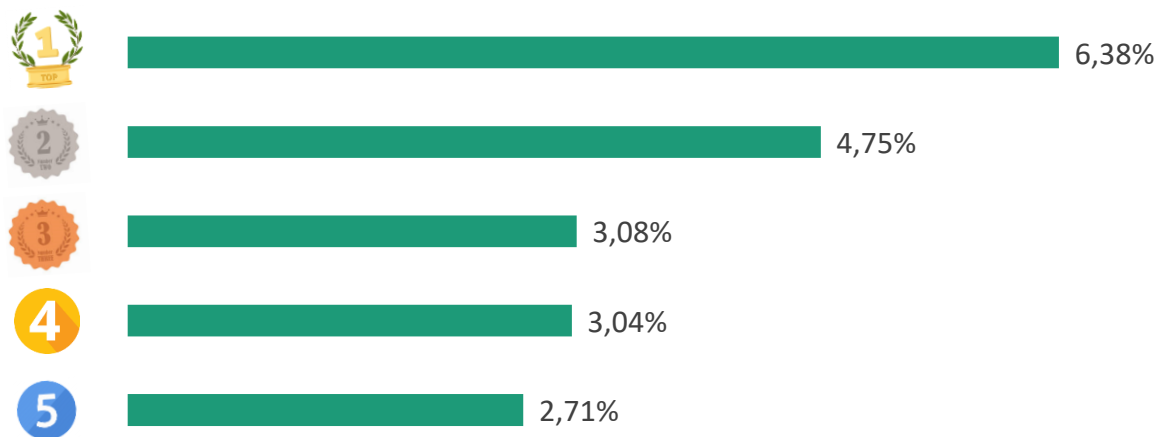
Wood slabs

Value: **5,0** Mil. USD

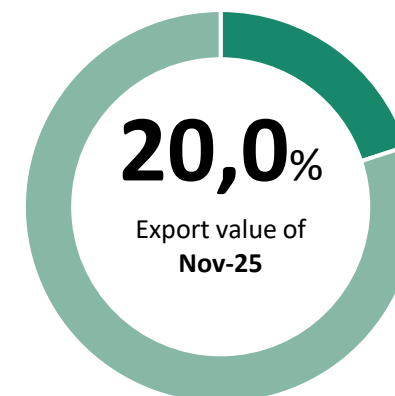
Increase **9%** compare to Oct-25

Increase **34%** compare to Nov-24

TOP 5 export enterprises by value to ASEAN, Nov-25



Value ratio of TOP 5 export enterprises to ASEAN, Nov-25





WOOD & WOODEN PRODUCTS

SPOTLIGHT



Malaysia's wood industry is facing a complex context. In Sabah, the Sabah Timber Industry Association (STIA) is calling on the government to strengthen support to address structural challenges and maintain competitiveness, while also rolling out new digital systems such as an "Electronic Transport Permit System" to improve transparency. Meanwhile, in Sarawak, the industry is seeing strong growth in value-added products, with wood pellet exports rising by 60% in the third quarter.

In Indonesia, exports of forest products overall are showing signs of stagnation at around USD 12 billion per year, and the sector's contribution to national GDP has also recorded a notable decline in 2025. In response, the government is shifting its focus toward promoting deeper processing to increase value added and expanding non-timber forest products. The recently signed Indonesia-EU Comprehensive Economic Partnership Agreement (IEU-CEPA) is expected to be a key growth driver, with forecasts suggesting it could boost exports to the EU by more than 50%.



TIN LIÊN QUAN



WOOD & WOODEN PRODUCTS

ĐIỂM TIN THỊ TRƯỜNG GỖ VÀ SP GỖ ASEAN



Myanmar's wood industry is experiencing a downturn period due to economic and political instability ahead of the general election scheduled for December 2025. Myanma Timber Enterprise (MTE), a state-owned company, is facing difficulties in marketing logs and sawn timber on international markets, leading it to increasingly shift sales to the domestic market. This challenging environment has also forced some private sawmills to temporarily halt export-oriented production and has created prolonged uncertainty over the domestic legal framework for timber legality.

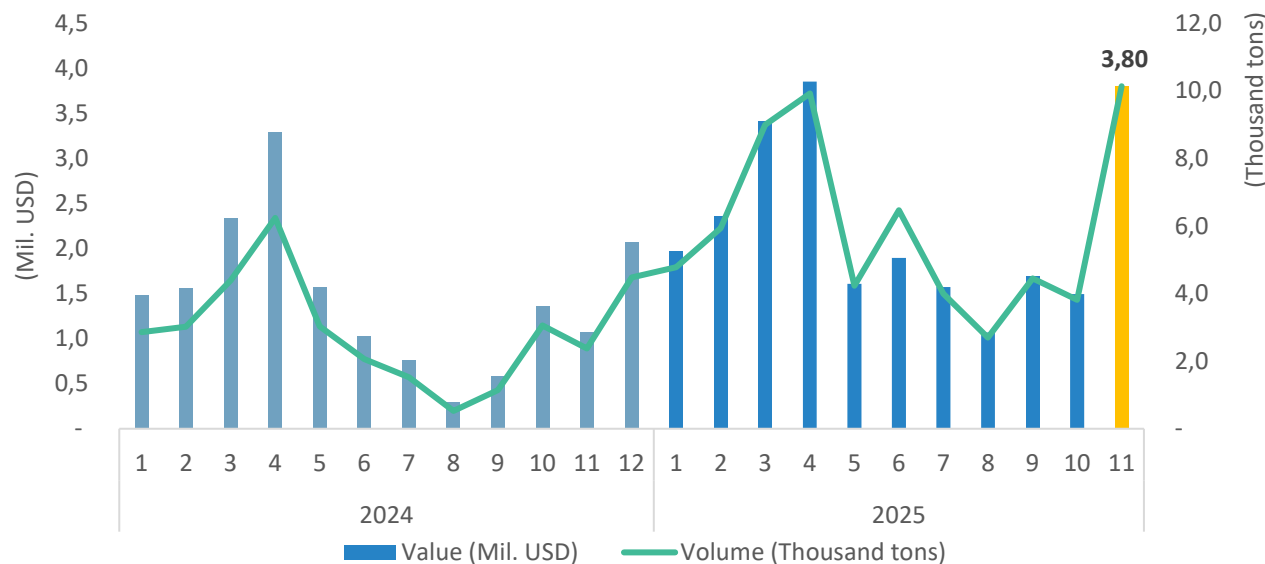


TIN LIÊN QUAN



CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Nov-25



Export results to ASEAN, Nov-25

VALUE
3,8 Mil. USD

↗ Increase **154%** compare to Oct-25

↗ Increase **254%** compare to Nov-24

↑ **1,43** Mil. USD more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **24,7** Mil.USD, and the rate is **87,2%** of the total in 2024.

VOLUME
10,1 thousand tons

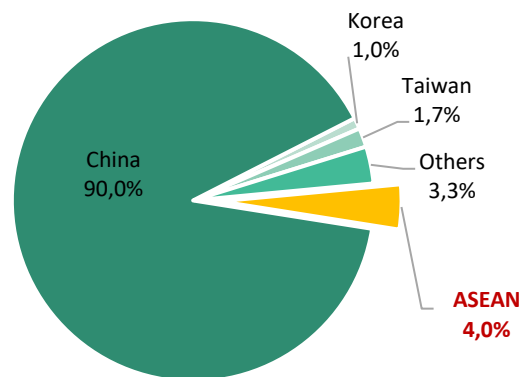
↗ Increase **166%** compare to Oct-25

↗ Increase **327%** compare to Nov-24

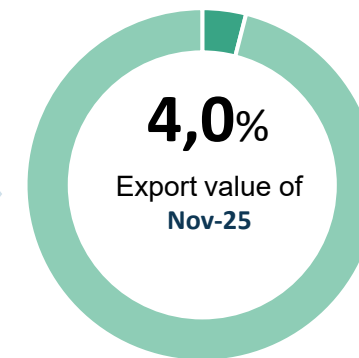
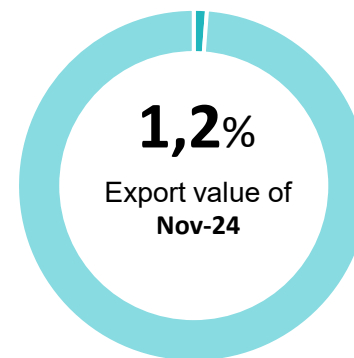
↑ **5,4** thousand tons more than the monthly average rate in 2024

❖ Accumulated 11 months of 2025 reaches **65,4** thousand tons, and the rate is **115,4%** of the total in 2024.

Percentage of export value to ASEAN, Nov-25



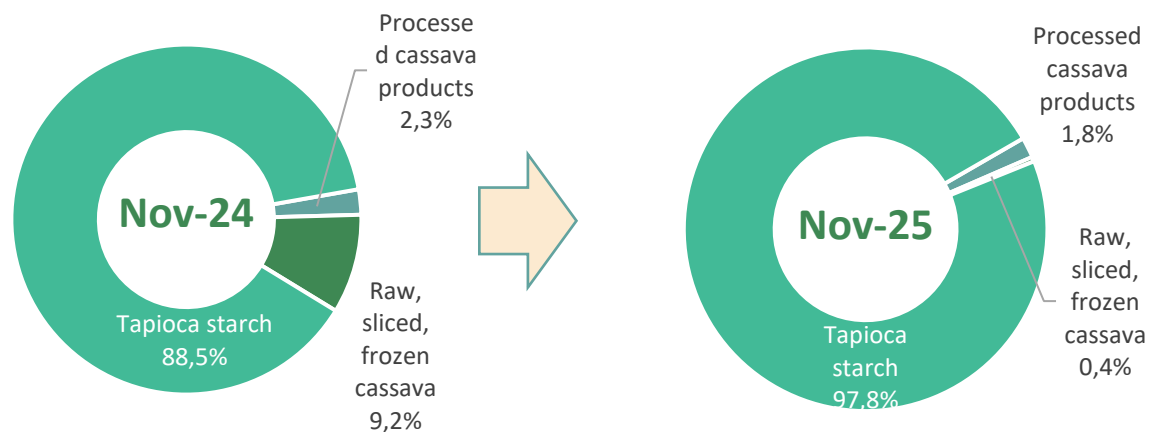
Changes in percentage of export value to ASEAN, Nov-25





CASSAVA & CASSAVA PRODUCTS

Structure of export value by products to ASEAN, Nov-25



Export results to ASEAN, Nov-25



Processed cassava products

Value: **69** thousand USD

Increase **34%** compare to Oct-25

Increase **174%** compare to Nov-24



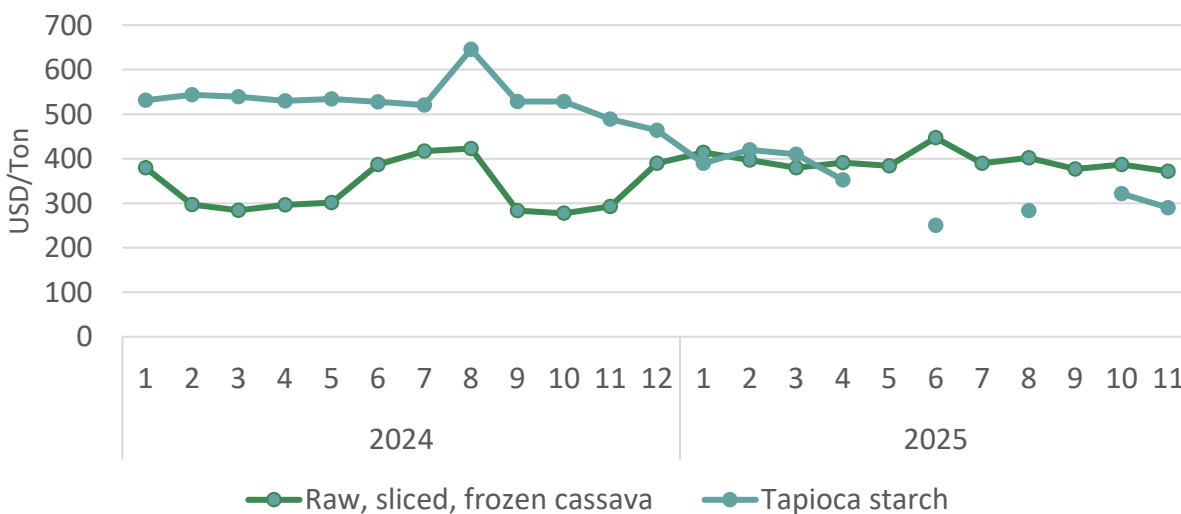
Tapioca starch

Value: **3,71** Mil. USD

Increase **167%** compare to Oct-25

Increase **291%** compare to Nov-24

Percentage of export value to ASEAN, Nov-25



Tapioca starch

compare to the previous month **372** USD/ton; **Decrease 0,8%** compare to the previous month; and **Decrease 24%** compare to the same month in 2024.

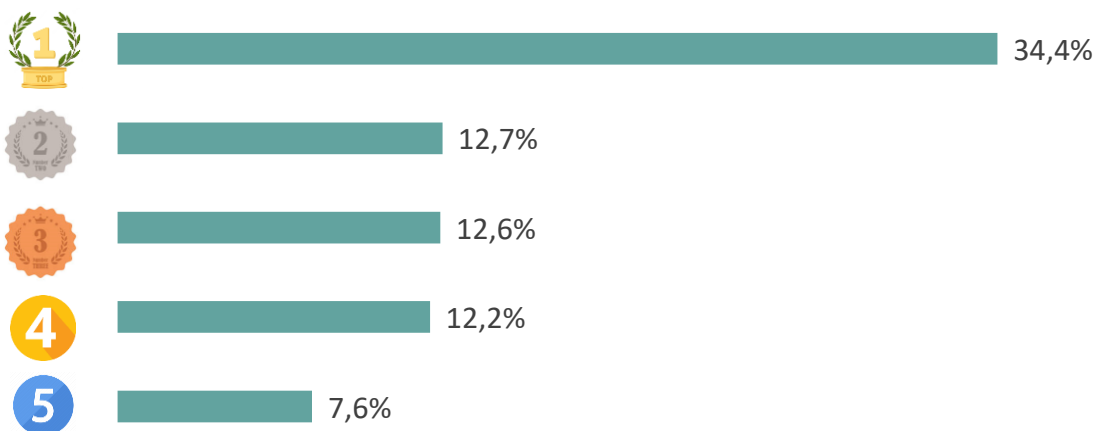
Raw, sliced, frozen cassava

compare to the previous month **290** USD/ton; **Decrease 9,8%** compare to the previous month; and **Decrease 3,8%** compare to the same month in 2024.

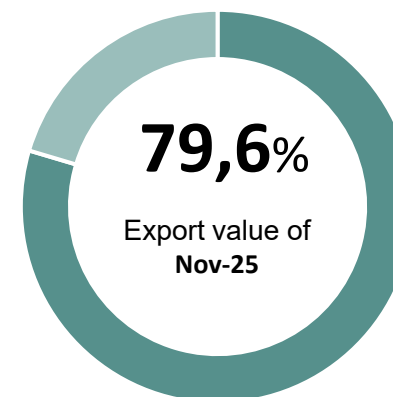


CASSAVA & CASSAVA PRODUCTS

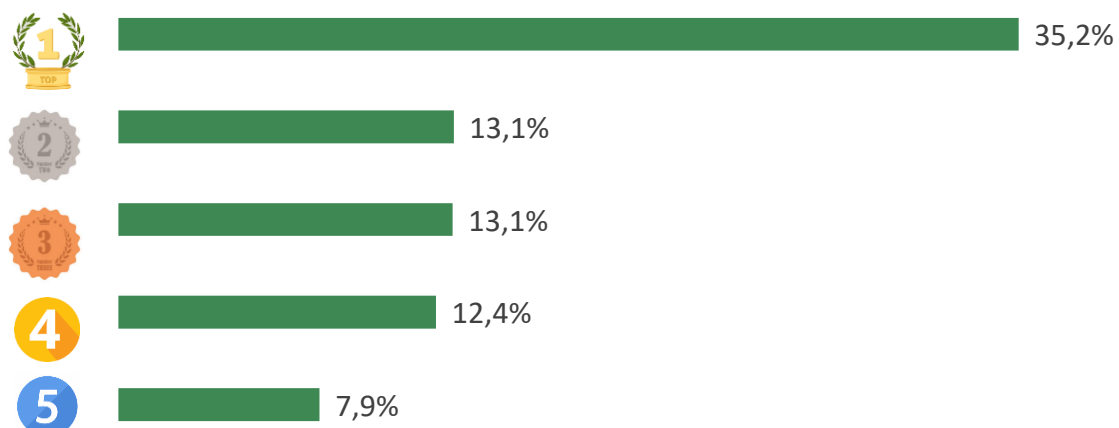
TOP 5 export enterprises by to ASEAN, Nov-25



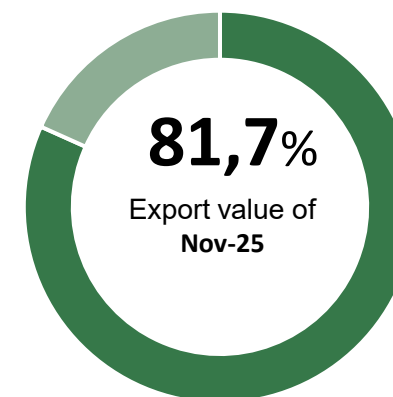
Value ratio of TOP 5 export enterprises to ASEAN, Nov-25



TOP 5 export enterprises by volume to ASEAN, Nov-25



Volume ratio of TOP 5 export enterprises to ASEAN, Nov-25



CASSAVA & CASSAVA PRODUCTS

SPOTLIGHT



The ASEAN market is driving Vietnam's cassava export growth in November 2025.

According to the Viet Nam Customs, in November 2025, Vietnam's exports of cassava and cassava products to the ASEAN market recorded a strong growth in both value and volume, in the context of supply decline and increase import demand of ASEAN countries.

Specifically, export turnover of cassava and cassava products from Vietnam to ASEAN in November 2025 reached about USD 3.8 million, up 154% compared to October 2025 and up 254% compared to November 2024. Cumulatively in the first 11 months of 2025, export value to the ASEAN market reached USD 24.7 million, equivalent to 87.2% of Vietnam's total cassava export value for the whole of 2024. This result shows that ASEAN is playing an increasingly important role in Vietnam's cassava export market structure.

Overall, Vietnam's cassava exports to the ASEAN market in November 2025 grew strongly, supported by rising import demand and Vietnam's price competitiveness. However, the decline in domestic cassava supply remains a factor that needs close monitoring, as it could affect the ability to sustain export growth in the coming months if there has not appropriate measures to balance and stabilize raw material supply.

Source: Department of Customs



TIN LIÊN QUAN

CASSAVA & CASSAVA PRODUCTS

SPOTLIGHT



Thailand cassava exports experienced strong growth, exceeding targets in the first 11 months of 2025.



Thailand's Department of International Trade Promotion (DITP) reported that in the first 11 months of 2025, Thailand's total cassava export volume reached 7.83 million tons, up 28.36% compared to the same period last year (6.10 million tons) and exceeding the target of 7.5 million tons. This performance was driven by government export promotion policies focused on expanding new markets while maintaining traditional ones, along with effective trade promotion activities. Notably, the 2025 World Tapioca Conference generated transaction values of more than USD 280 million, making a significant contribution to Thailand's cassava export growth.

In terms of export markets, China remained the largest destination with exports of 5.72 million tons, accounting for 56.37% of total export volume. Other markets included Japan (0.36 million tons), Indonesia (0.25 million tons), Malaysia (0.23 million tons), the United States (0.14 million tons), and other markets with a combined total of 1.13 million tons.

Regarding import, Thailand imported 4.01 million tons of fresh cassava roots and cassava chips, down 6.74% compared to the same period last year. Imports from Cambodia reached 1.38 million tons, down 30.65%, while Laos became the largest supplier with 2.61 million tons, up 14.47%.

In 2026, the DITP stated that Thailand will expand cassava export markets through trade promotion activities and international fairs, targeting potential markets such as southern China, Japan, North America, and Europe, while also promoting the use of cassava in deep-processing industries to increase value added.

Source: tna.mcot.net





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Nov-25



Export results to ASEAN, Nov-25

VALUE



Increase **53%** compare to Oct-25

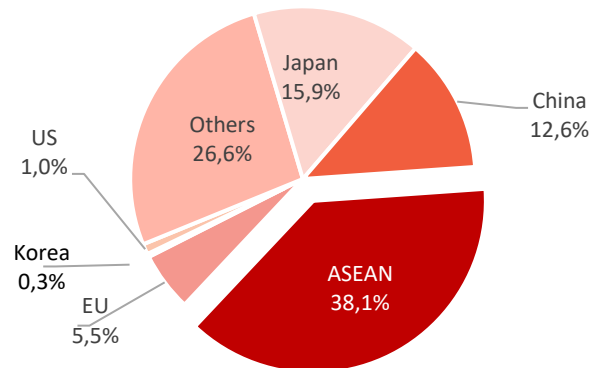
Increase **51%** compare to Nov-24

6,92 triệu USD more than the monthly average rate in 2024

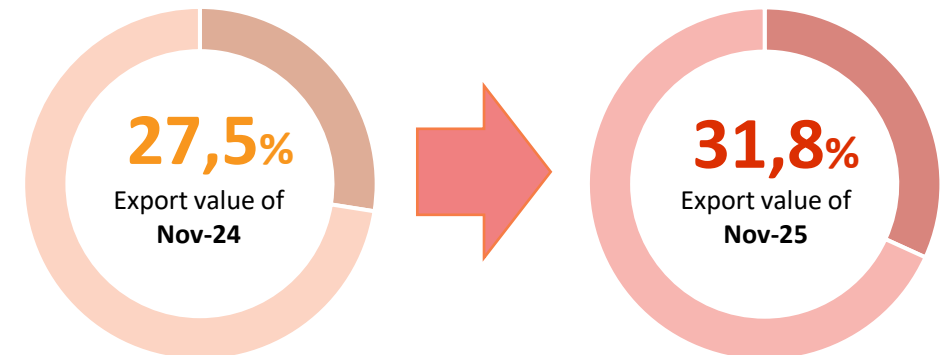
11,1
Mil. USD

◆ Accumulated 11 months of 2025 reaches **55,35 Mil. USD**, and the rate is **110,5%** of the total in 2024.

Percentage of export value to ASEAN, Nov-25



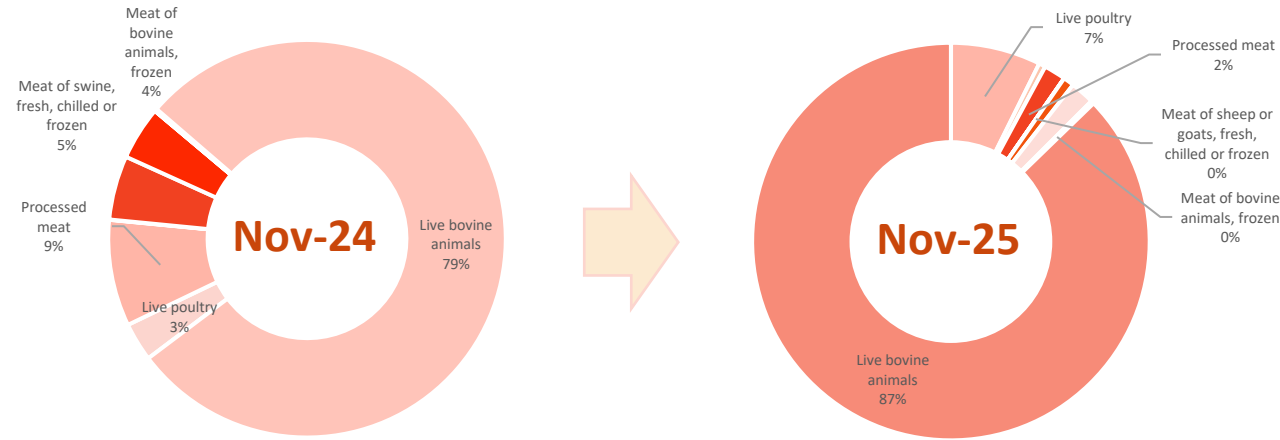
Changes in percentage of export value to ASEAN, Nov-25





MEAT & MEAT PRODUCTS (EXPORT)

Export value to ASEAN, Nov-25



Export results to ASEAN, Nov-25



Live bovine animals

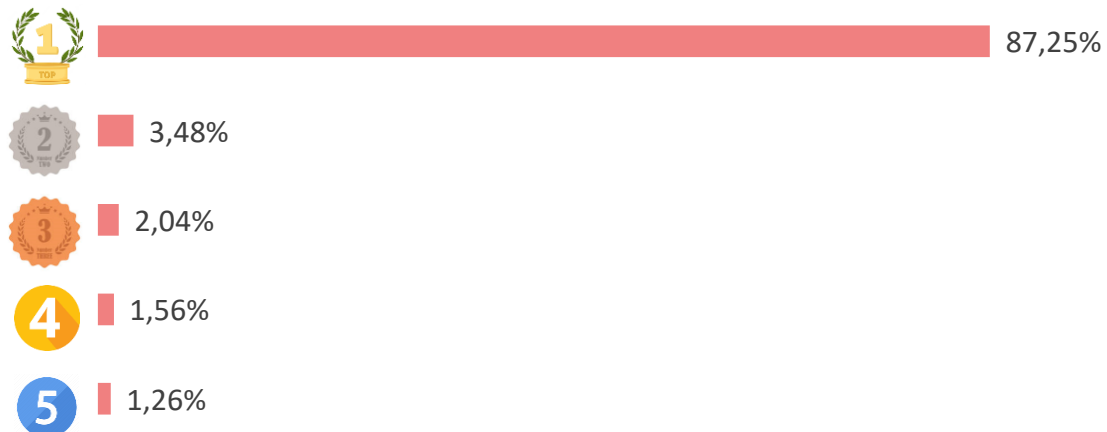
Value: **9,7** Mil. USD
 Increase **64%** compare to Oct-25
 Increase **68%** compare to Nov-24



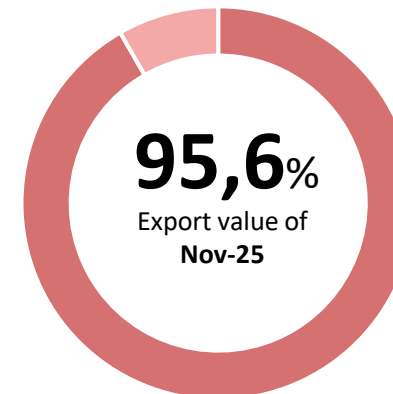
Live poultry

Value: **812** thousand USD
 Increase **0,2%** compare to Oct-25
 Increase **251%** compare to Nov-24

Percentage of export value to ASEAN, Nov-25



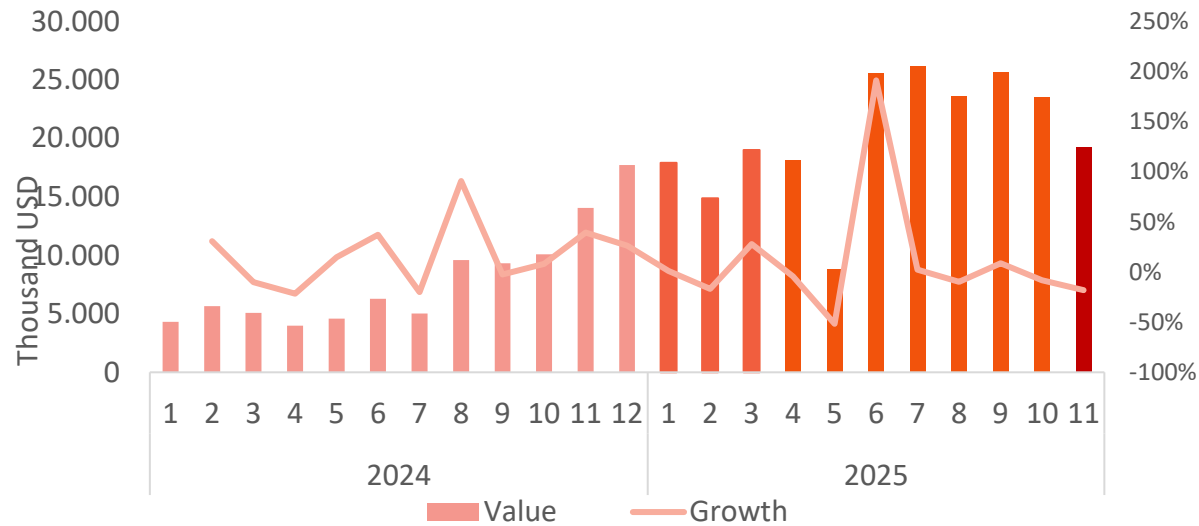
Changes in percentage of export value to ASEAN, Nov-25





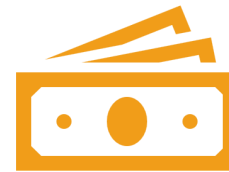
MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Nov-25



Import results to ASEAN, Nov-25

VALUE



20,9

Mil. USD

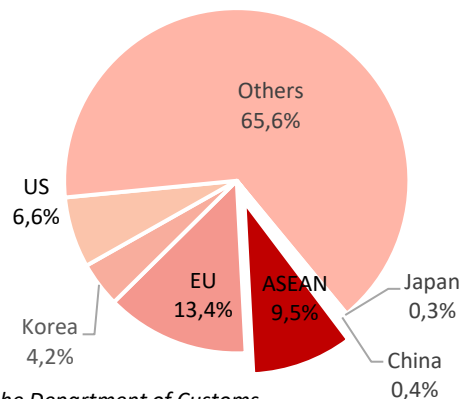
Decrease **18%** compare to Oct-25

Increase **106,3%** compare to Nov-24

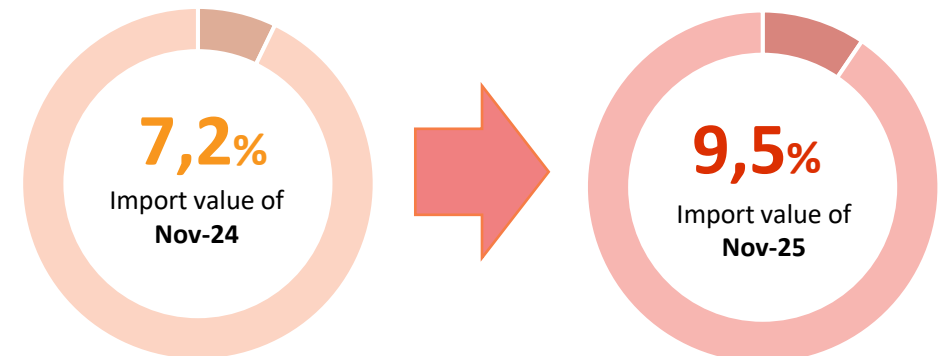
11,3 Mil. USD more than the monthly average rate in 2024

◆ Accumulated 11 months of 2025 reaches **222,3 Mil. USD**, and the rate is **232%** of the total in 2024

Percentage of import value to ASEAN, Nov-25



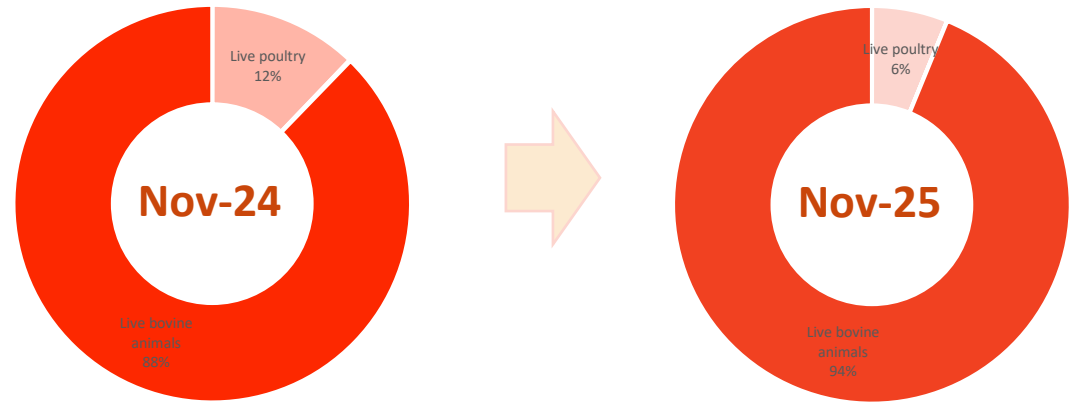
Changes in percentage of import value to ASEAN, Nov-25





MEAT & MEAT PRODUCTS (IMPORT)

Import value to ASEAN, Nov-25



Import results to ASEAN, Nov-25

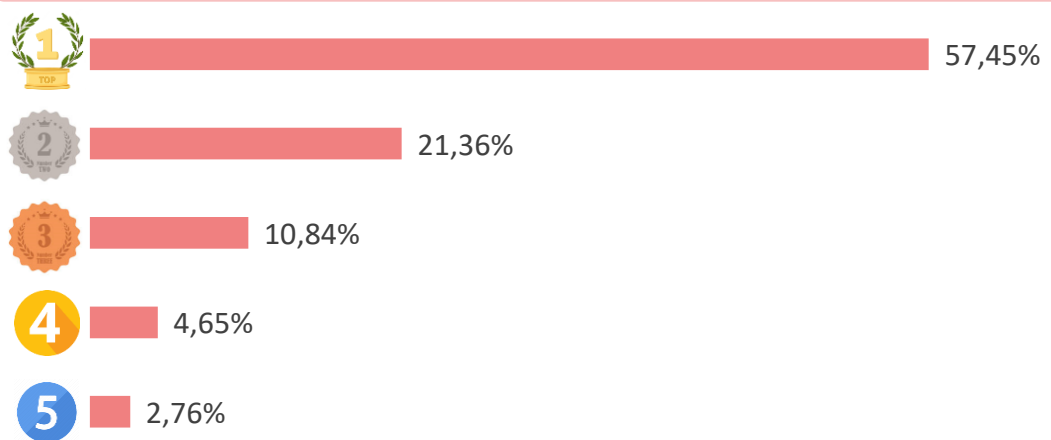


Live bovine animals
 Value: **18,1** Mil. USD
 Decrease **16,2%** compare to Oct-25
 Increase **46,4%** compare to Nov-24

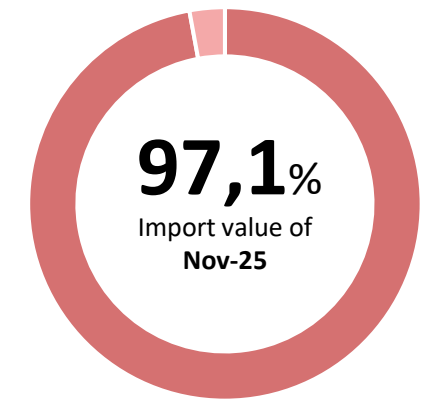


Live poultry
 Value: **1,67** Mil. USD
 Decrease **37,3%** compare to Oct-25
 Decrease **31,4%** compare to Nov-24

Percentage of import value to ASEAN, Nov-25



Changes in percentage of import value to ASEAN, Nov-25



Source: Calculated from data of the Department of Customs



MEAT & MEAT PRODUCTS

SPOTLIGHT



Jeju (South Korea) officially exports beef and pork to Singapore, highlighting intensifying competition in the premium meat market in Southeast Asia. In just the first half of the month, Jeju exported 19 tons of meat to Singapore at prices about 20% higher than in the domestic market, reflecting strong demand for high-end meat products with full traceability. Singapore is actively importing and promoting Jeju meat, opening up prospects for export growth to multiply in the coming year. This development is creating new competitive pressure for meat-exporting countries in the region, including Indonesia, especially in the high-quality segment and premium distribution channels.

Source: tridge.com



Tin liên quan



For feedback, please contact:

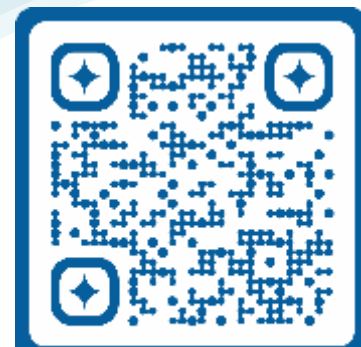
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Xem thêm báo cáo