



ISPAAE

Volume: July-2025

MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

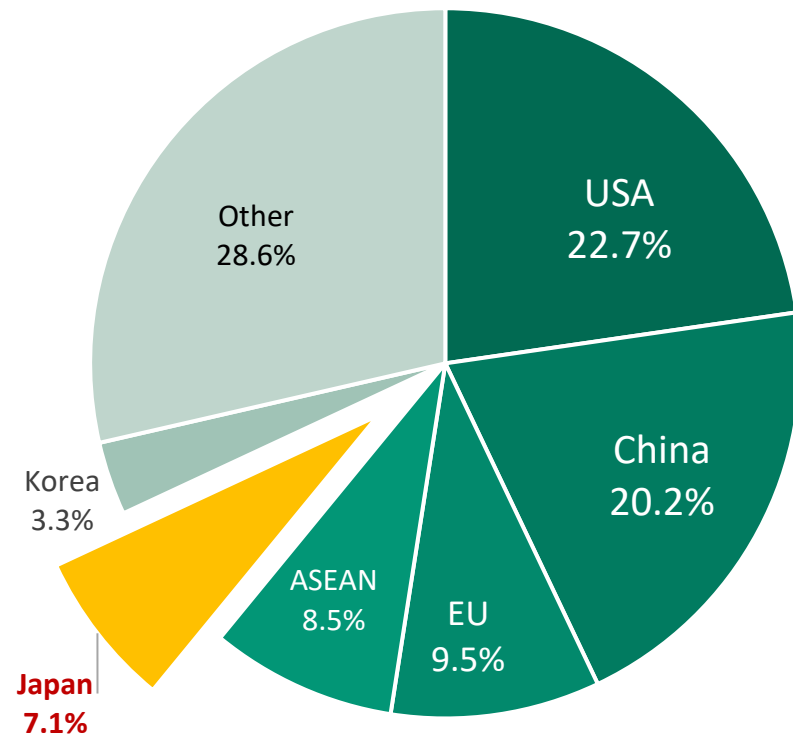
**FROM VIETNAM TO
JAPAN MARKET**

Prepared by: **AGREINFOS**



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

Share of AFF product export to Japan in June-2025

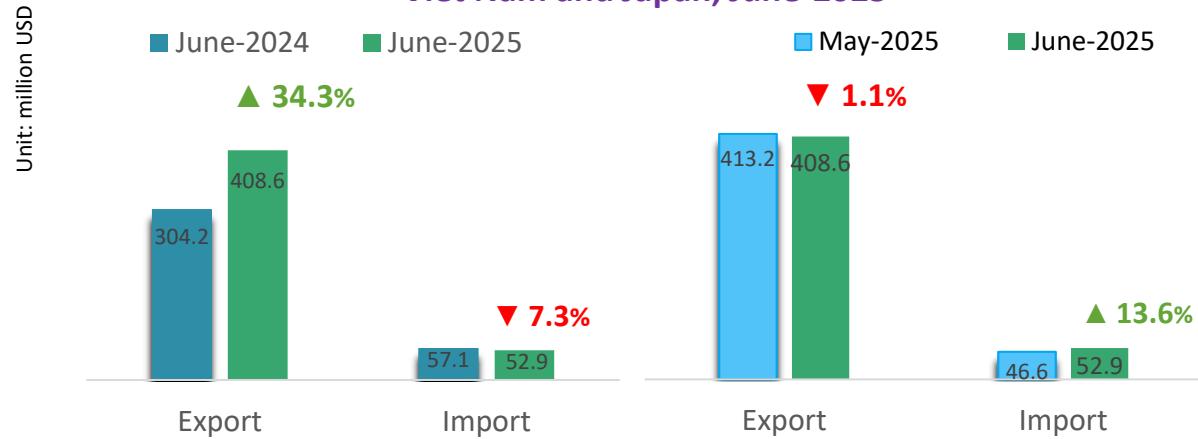


Changes in the share of AFF product export to Japan in June-2025 compared to May-2025 and June-2024

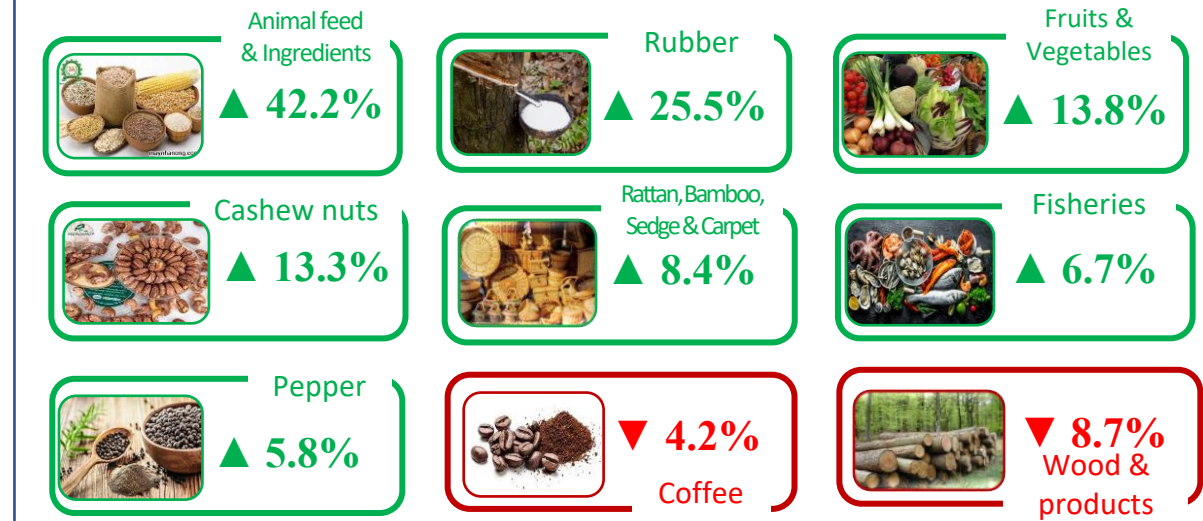
Market	Export value (million USD)	Compared to May-2025	Compared to June-2024
USA	1,161	▼ 3.3%	▼ 2.1%
China	1,303	▲ 4.1%	▲ 0.0%
EU	547	▼ 1.9%	▲ 1.7%
ASEAN	486	▼ 1.1%	▼ 0.4%
Japan	409	▲ 0.4%	▲ 1.0%
Korea	192	▲ 0.1%	▼ 0.6%
Total export	5,738		

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

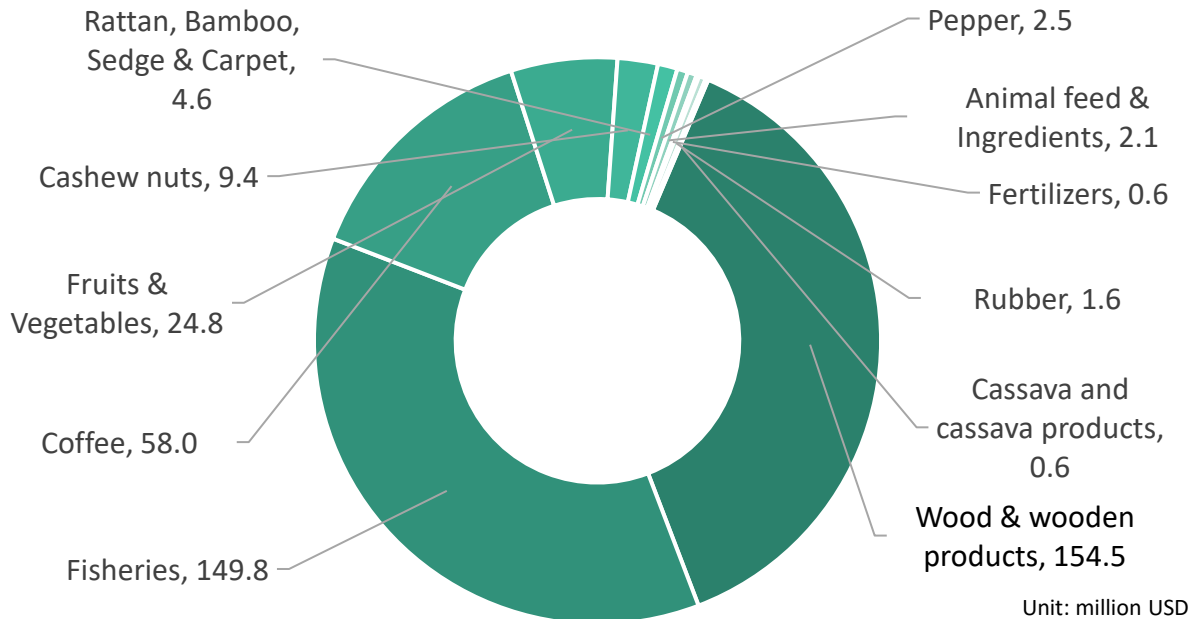
AFF product import-export value between Viet Nam and Japan, June-2025



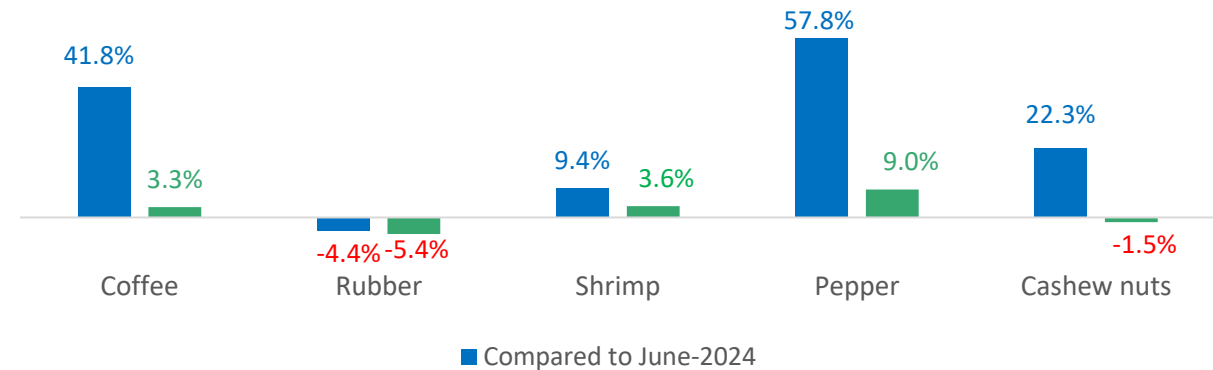
Changes in key AFF product export value to Japan in June-2025 compared to May-2025



Key AFF product export value to Japan, June-2025



Changes in key AFF product export value to Japan in June-2025 compared to May-2025 and compared to June-2024

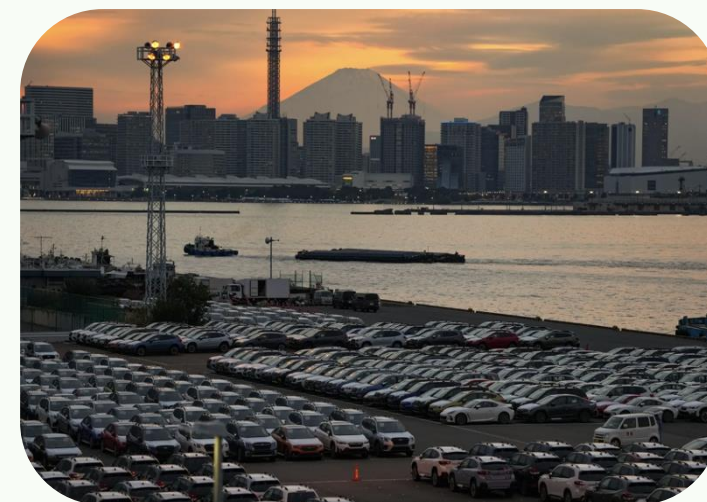


Japan's exports continue to fall under U.S. tariff pressure

In June 2025, Japan's export value decreased by 0.5% year-on-year, following a 1.7% decline in May. This marked the second consecutive month of export contraction, mainly due to the impact of U.S. tariff policy. Exports to the United States fell sharply by 11.4%, highlighting the growing challenge in this

key market.

Currently, Japanese goods - except for those subject to U.S. sectoral tariffs such as automobiles, steel, aluminum, and copper - face the same 10% base tariff as goods from other economies. Analysts warn that if U.S. tariffs on Japan increase, the Japanese economy will be at risk of a recession.



Source: vneconomy.vn

U.S. President announces to achieve trade agreement with Japan

On July 23, the President Donald Trump announced that the U.S. reached a trade agreement with Japan. According to the agreement, Tokyo will invest \$550 billion in the United States, while Washington will impose a reciprocal tariff of 15%.

On the social network Truth Social, the President Trump stated that Japan will open

its commercial market to a wide range of items, including cars, trucks, rice, and agricultural products. He called it "the biggest deal ever" and expressed confidence that it could create hundreds of thousands of jobs.

The agreement was signed after Japanese Prime Minister Shigeru Ishiba faced a tough election in which his coalition lost its majority in the upper house. Immediately after the U.S. President's announcement, Japanese auto stocks surged, pushing the Nikkei 225 index

up more than 1% at the opening.



Source: nhandan.vn





WOOD AND WOODEN PRODUCTS

Export value to Japan, June-2025



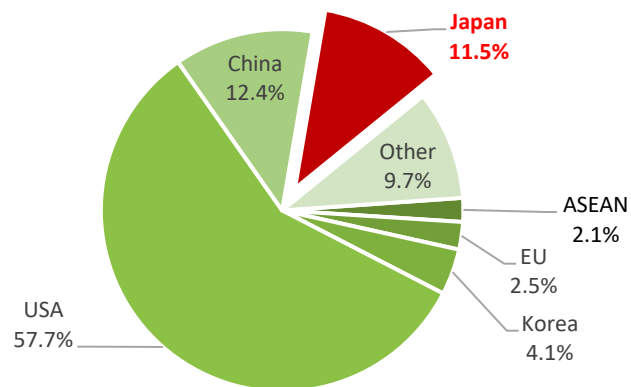
Export results to Japan, June-2025

VALUE

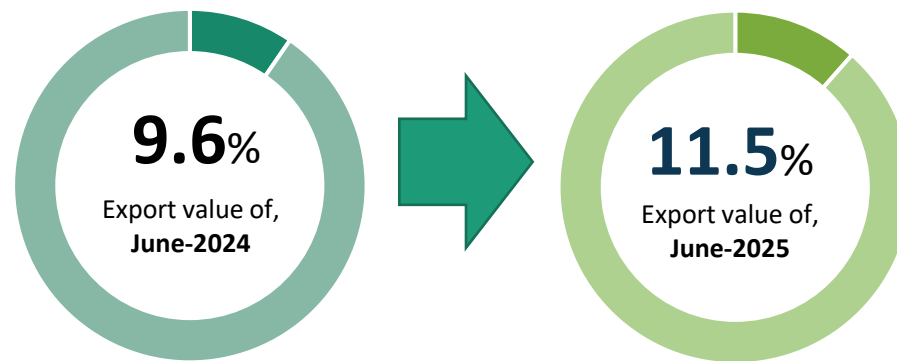
154
million USD

- Decrease **8.7%** compared to May-2025
- Increase **29.1%** compared to June-2024
- ↑ **8.9 million USD** more than the monthly average rate in 2024
- ❖ Accumulated 6 months of 2025 reaches **1.01 billion USD, 58.2%** of total 2024

Percentage of export value to Japan, June-2025



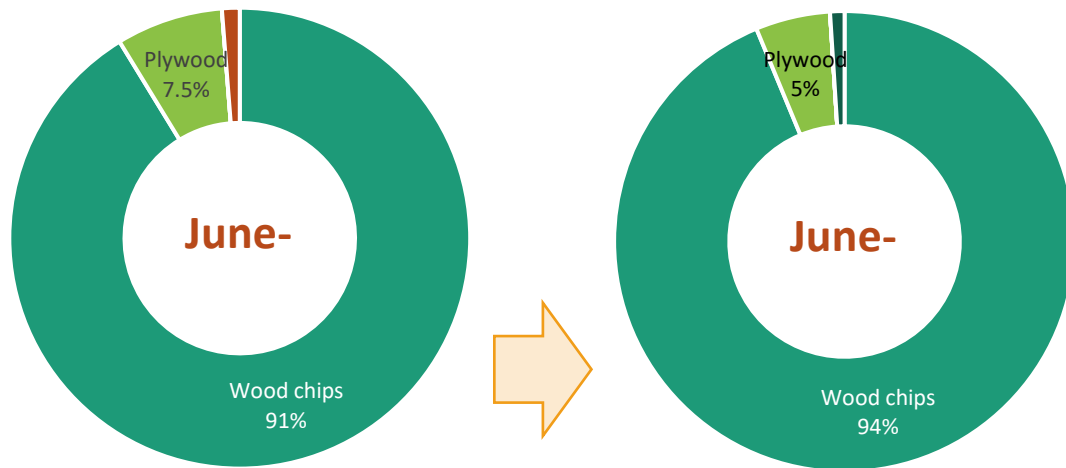
Changes in percentage of export value to Japan, June-2025





WOOD AND WOODEN PRODUCTS

Structure of exports by products to Japan, June-2025



Export results to Japan, June-2025



Wood chips

Value: **106.2** million USD

Decrease **14%** compared to May-2025

Increase **45%** compared to June-2024



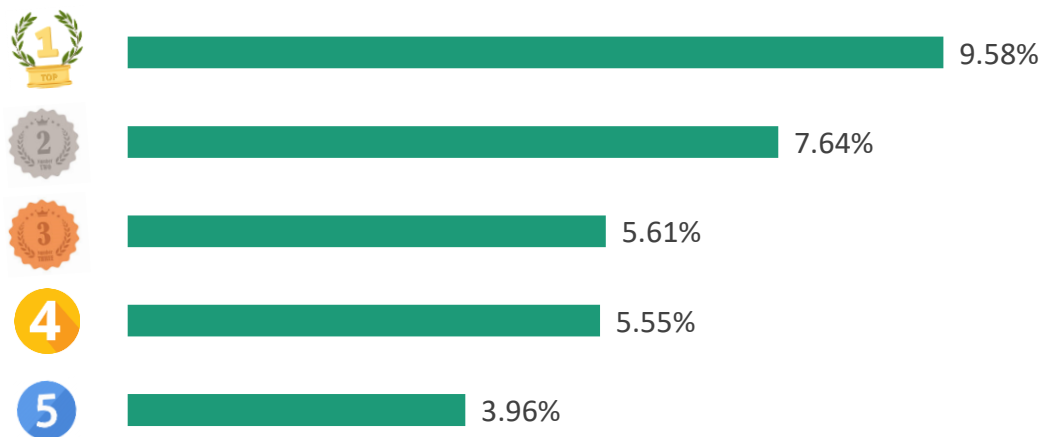
Plywood

Value: **5.9** million USD

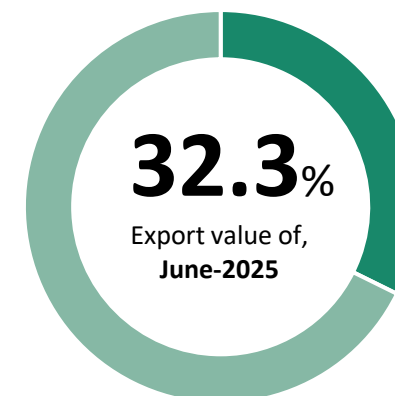
Decrease **17%** compared to May-2025

Decrease **1%** compared to June-2024

TOP 5 export enterprises by value to Japan, June-2025



Value ratio of TOP 5 export enterprises to Japan, June-2025



WOOD AND WOODEN PRODUCTS



SPOTLIGHTS

Japan's trade data for the first 6 months of 2025 shows conflicting trends among major imported timber commodities, especially softwood lumber and laminated plywood.

Specifically, imports of softwood lumber maintains relative stability, with a total volume of 1.83 million m³, only a slight decrease of 1% over the same period last year. This stability also accompanies by a noticeable change in the structure of suppliers, as Japan ramps up purchases from Sweden, Finland and Russia, and reduces imports from Canada and Austria.

In contrast to the above trend, laminated timber recorded a sharp decline, with total imports in this period only reaching 285,000 m³, marking a decrease of up to 18% compared to the first half of 2024.



FISHERIES

Export value to Japan, June-2025



Export results to Japan, June-2025

VALUE

149.8 million USD



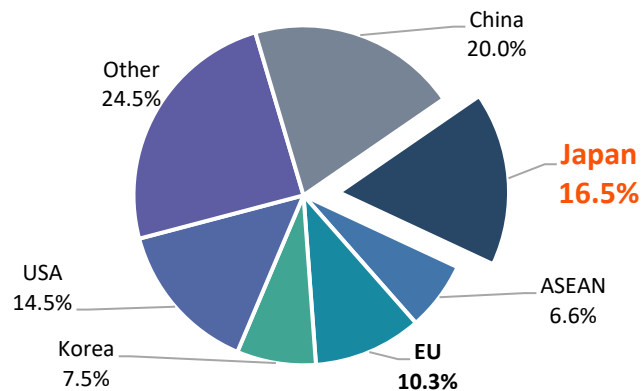
➔ Increase **6.7%** compared to May-2025

➔ Increase **20.6%** compared to June-2024

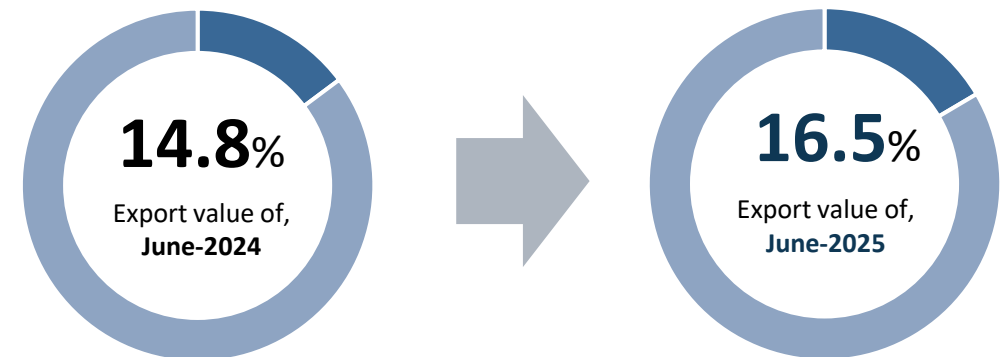
▲ **22.9** million USD more than the monthly average rate in 2024

❖ Accumulated 6 months of 2025 reaches **782.3** million USD, **51.4%** of total 2024

Percentage of export value to Japan, June-2025



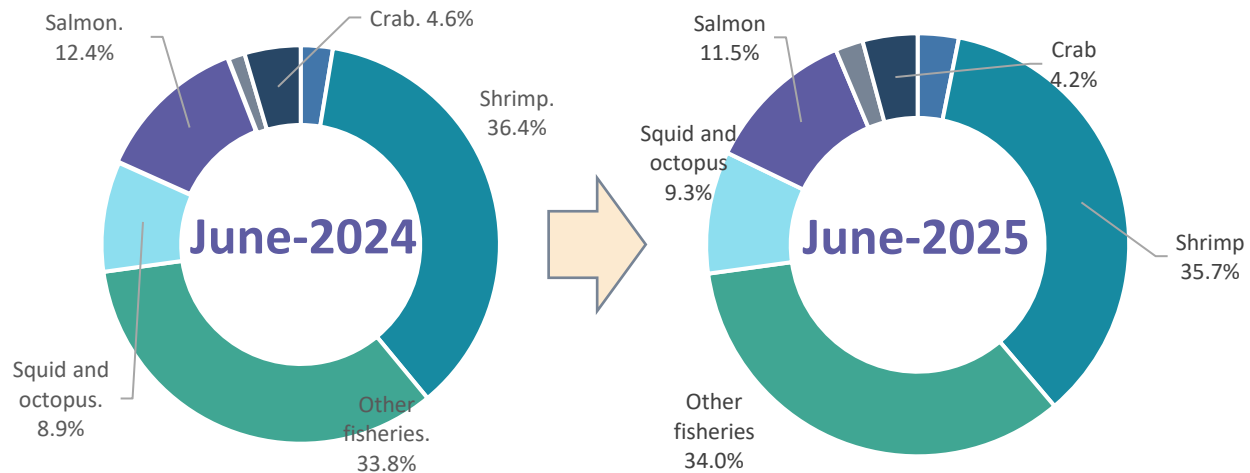
Changes in percentage of export value to Japan, June-2025





FISHERIES

Structure of exports by products to Japan, June-2025



Export results to Japan, June-2025



Salmon

Value: **17.2** million USD
 Increase **6.3%** compared to May-2025
 Increase **12.0%** compared to June-2024



Shrimp

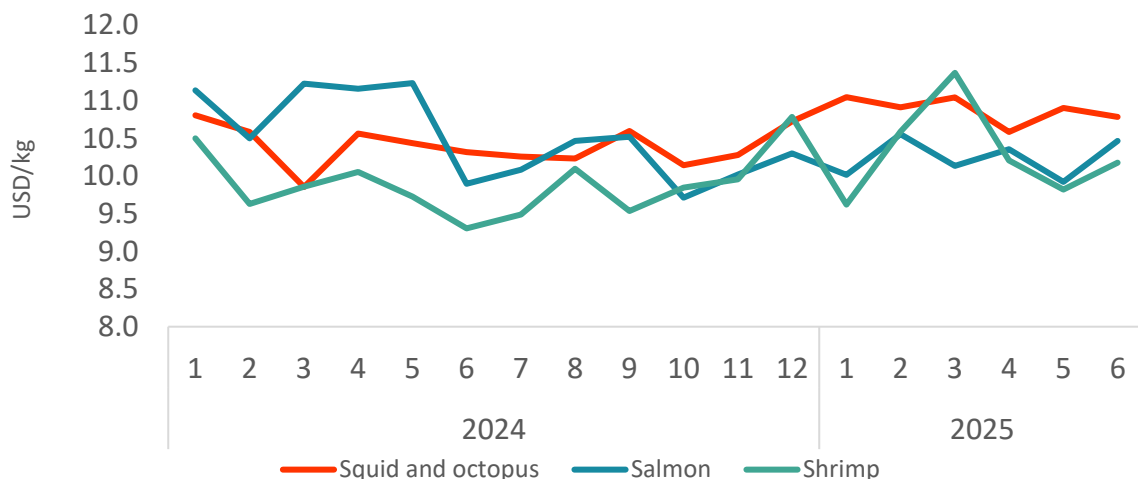
Value: **53.4** million USD
 Increase **8.7%** compared to May-2025
 Increase **18.1%** compared to June-2024



Squid and octopus

Value: **14.0** million USD
 Increase **14.6%** compared to May-2025
 Increase **26.5%** compared to June-2024

Average export fisheries price to Japan, June-2025



Squid and octopus

The average export price in June-2025 is **10.8** USD/kg; **Decrease 1.1%** compared to previous month; and **increase 4.5%** compared to the same month of 2024.

Salmon

The average export price in June-2025 is **10.5** USD/kg; **Increase 5.5%** compared to previous month; and **increase 5.8%** compared to the same month of 2024.

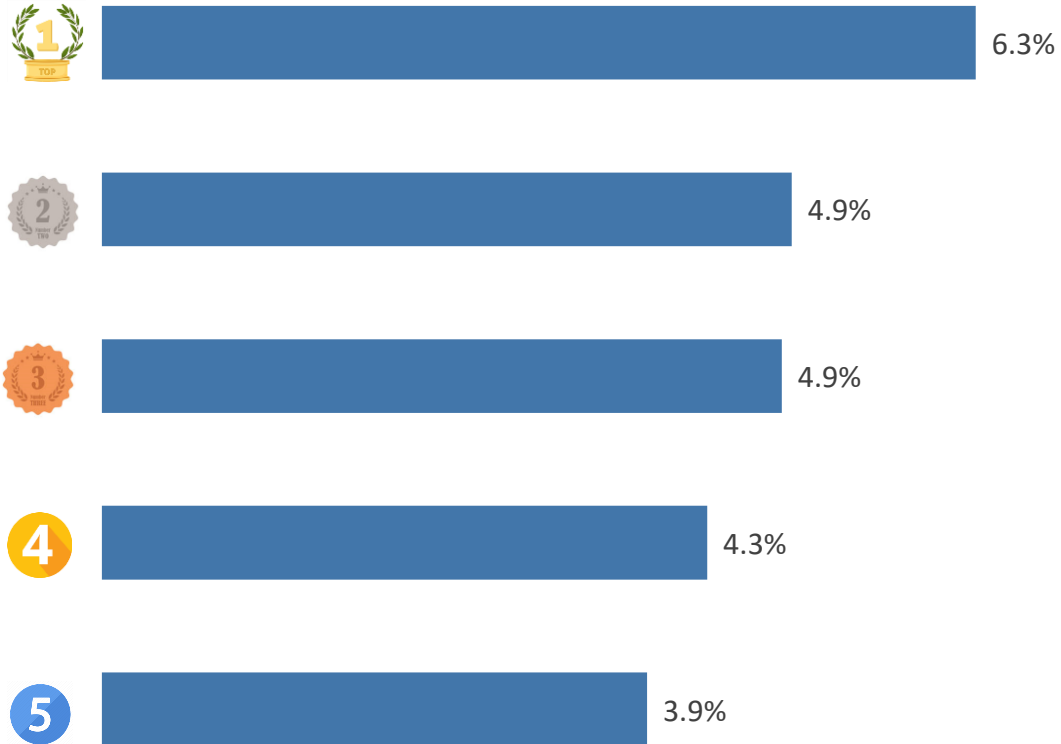
Shrimp

The average export price in June-2025 is **10.2** USD/kg; **Increase 3.6%** compared to previous month; and **increase 9.4%** compared to the same month of 2024.

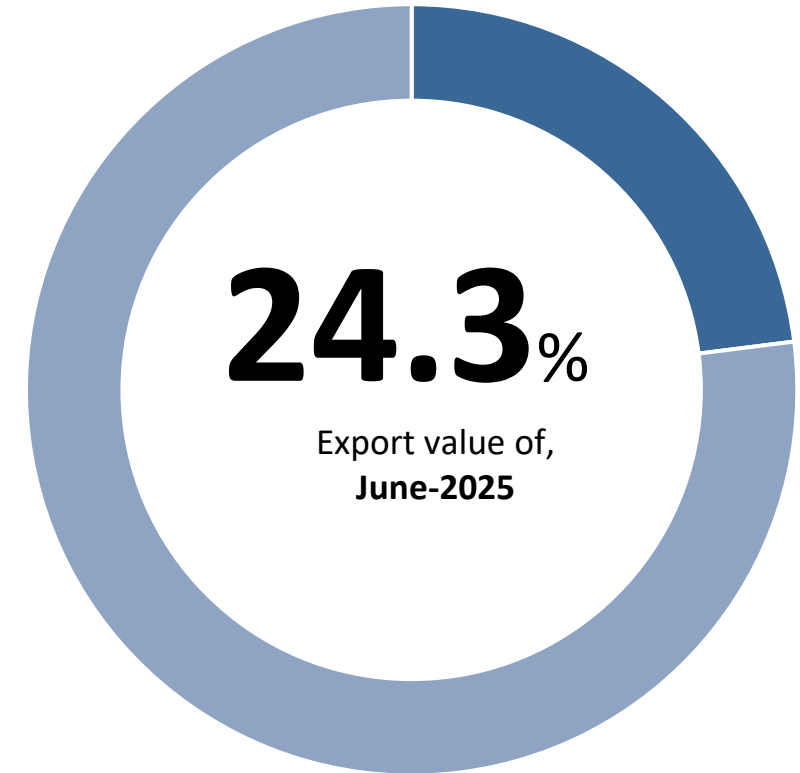


FISHERIES

TOP 5 export enterprises by value to Japan, June-2025



Value ratio of TOP 5 export enterprises to Japan, June-2025



Japanese scallop prices fall due to tariff concerns from the US

The Japanese scallop market is under pressure to reduce export prices, especially to the United States - a key market, due to concerns about tariff policies from the Trump President administration.

In the first 5 months of 2025, Japan exports 5,600 tons of frozen scallops, up 9%, reaching a value of about 145 million USD (+70%) thanks to the average price increasing to nearly 26 USD/kg. However, export prices fell sharply in April and May, down 23% and 35% respectively from the previous month, bringing the total decline to 49% since the peak in March.

In the U.S. market, in May, prices fell 13 percent from the previous month, with some U.S. importers delays purchasing due to their concerns about reciprocal tariffs under the Trump President administration.

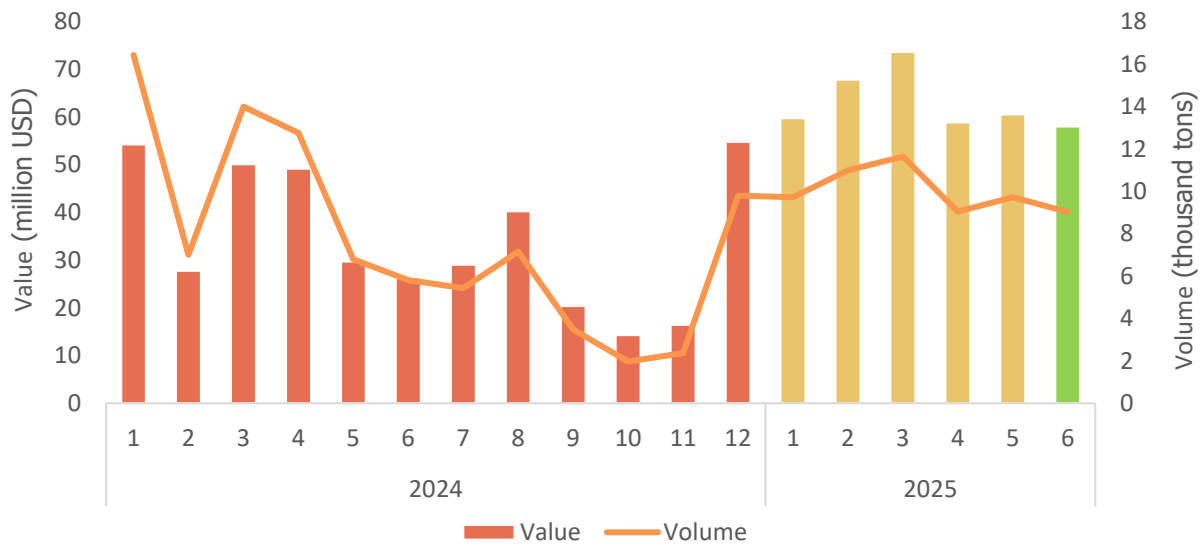
In contrast, scallop exports to Vietnam increases dramatically in May, increasing by 1,600% with 589 tons, but the price is about 4.3 USD/kg, much lower than the export price to the United States.

Source: Vasep



COFFEE

Export volume and value to Japan, June-2025



Export results to sang Japan, June-2025

VALUE
58 million USD

↘ Decrease **4.2%** compared to May-2025

↗ Increase **120.2%** compared to June-2024

↗ **23.6** million USD more than the monthly average rate in 2024.

❖ Accumulated 6 months of 2025 reaches **378.7** mil.USD, **91.8%** of total 2024

VOLUME
9 thousand tons

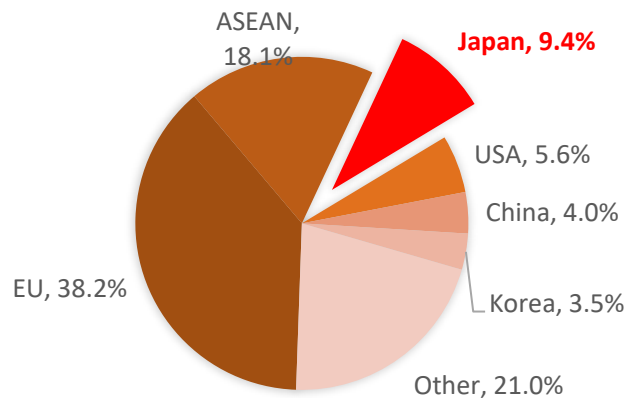
↘ Decrease **7.3%** compared to May-2025

↗ Increase **55.2%** compared to June-2024

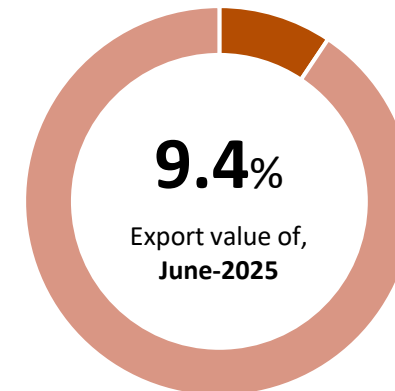
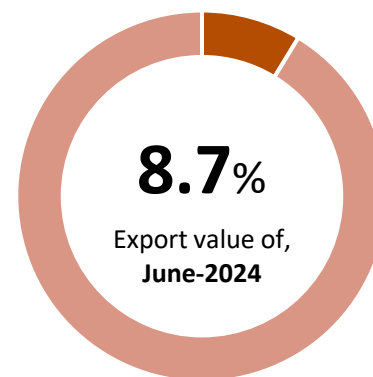
↗ **1.3** thousand tons more than the monthly average rate in 2024.

❖ Accumulated 6 months of 2025 reaches **60.1** thousand tons, **64.7%** of total 2024.

Percentage of export value to Japan, June-2025

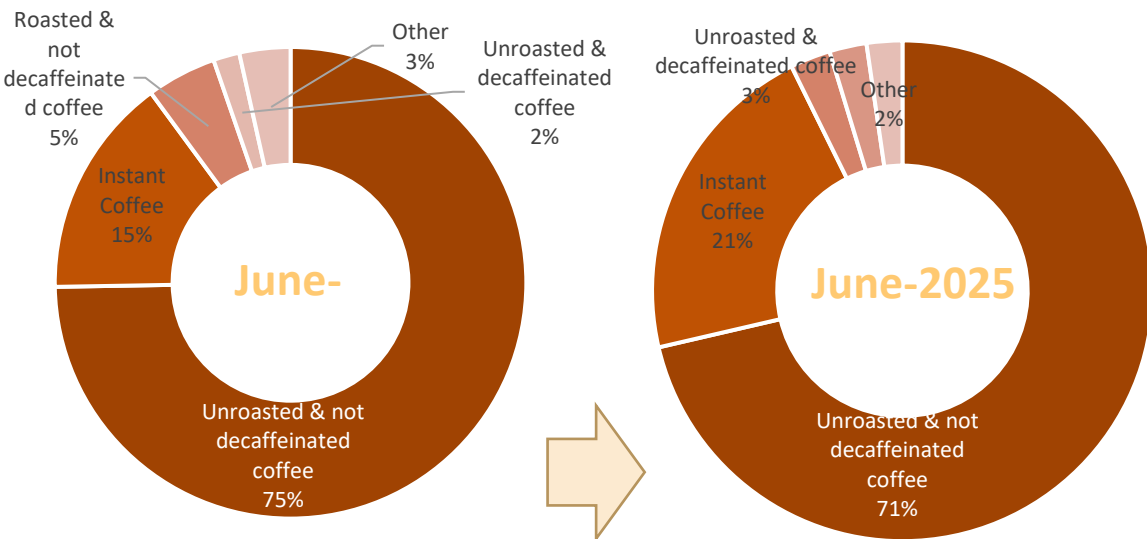


Changes in percentage of export value to Japan, June-2025

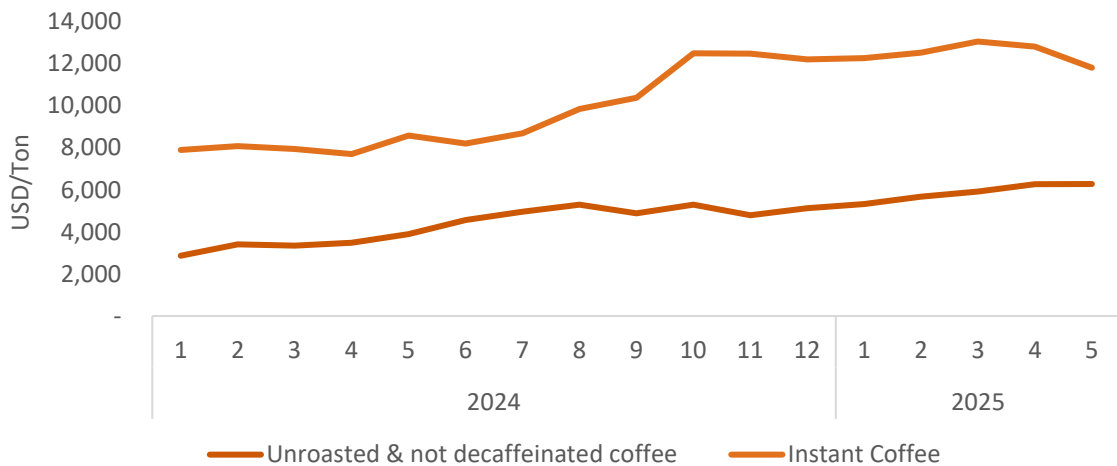


COFFEE

Structure of exports by products to Japan, June-2025



Average export coffee price to Japan, June-2025



Export results to Japan, June-2025



Unroasted & not decaffeinated coffee

Value: **41.4** million USD
 Decrease **9.9%** compared to May-2025
 Increase **110%** compared to June-2024



Instant Coffee

Value: **12.4** million USD
 Increase **29.1%** so compared to May-2025
 Increase **209%** compared to June-2024



Roasted & not decaffeinated coffee

Value: **1.5** million USD
 Increase **2.8%** compared to May-2025
 Increase **21.5%** compared to June-2024

Instant Coffee

The average export price in June-2025 is **12,473** USD/ton, increase **5.7%** compared to previous month; and increase **52.2%** compared to the same month of 2024.

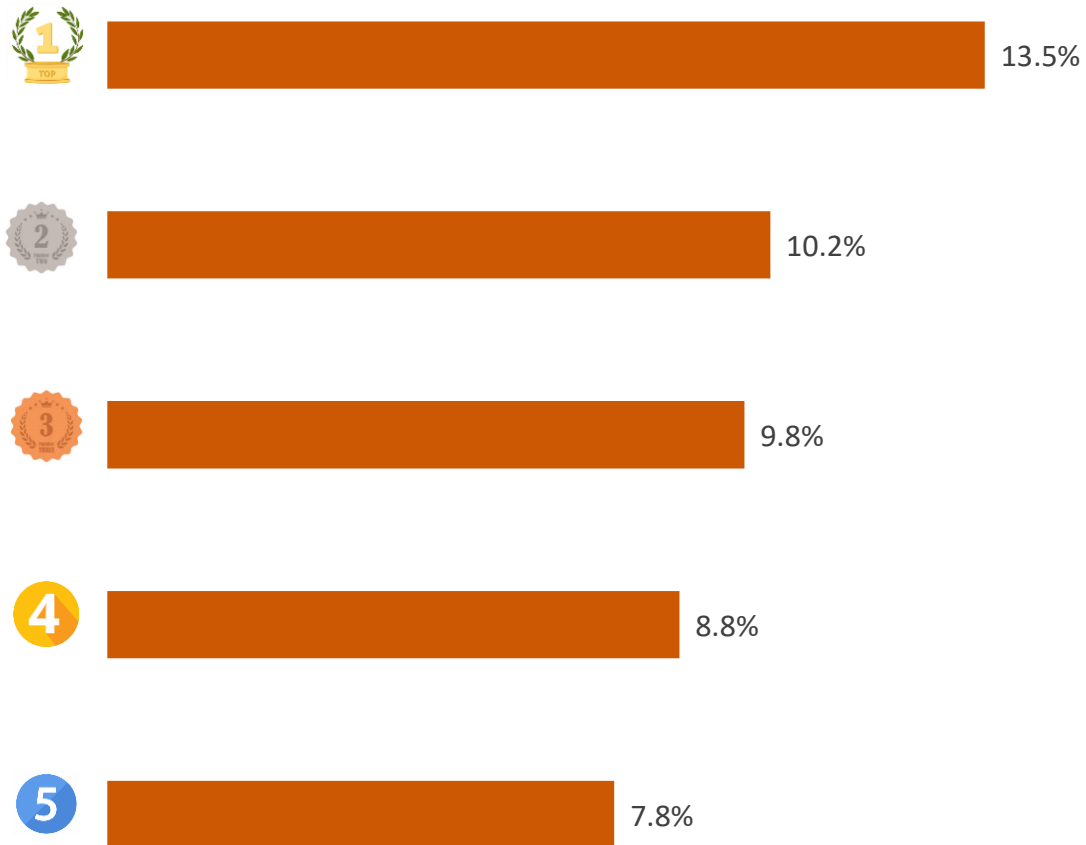
Unroasted & not decaffeinated coffee

The average export price in June-2025 is **6,273** USD/ton; increase **0,1%** compared to previous month; and increase **37,7%** compared to the same month of 2024.

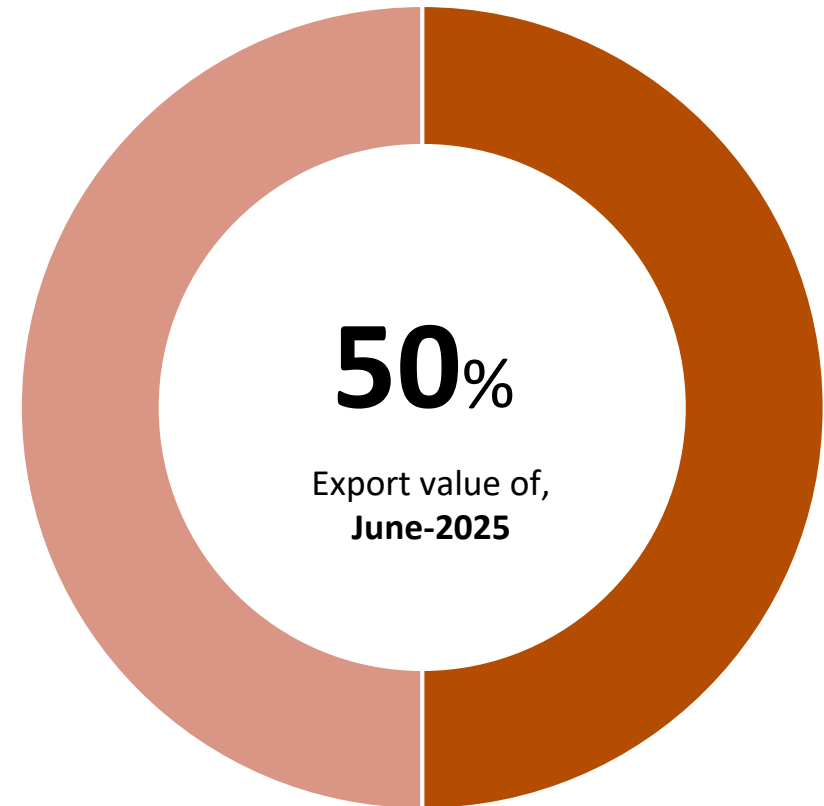


COFFEE

TOP 5 export enterprises by value to Japan, June-2025



Value ratio of TOP 5 export enterprises to Japan, June-2025





According to statistics from the Japan Customs Agency, in the first 5 months of 2025, Japan's coffee imports is nearly 1.01 billion USD, up 43.4% over the same period last year.

Of which, Japan's coffee imports from Vietnam reached 247.3 million USD, up 28.3% over the same period in 2024. Vietnam's coffee market share in decreased from 27.5% in 5 months of 2024 to 24.6% in 5 months of 2025.





FRUITS AND VEGETABLES (EXPORT)

Export value to Japan, June-2025



Export results to Japan, June-2025

VALUE

24.8
million USD

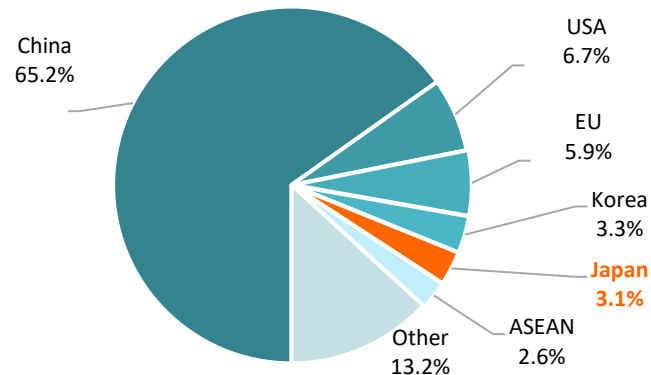
Increase **13.8%** compared to May-2025

Increase **30.5%** compared to June-2024

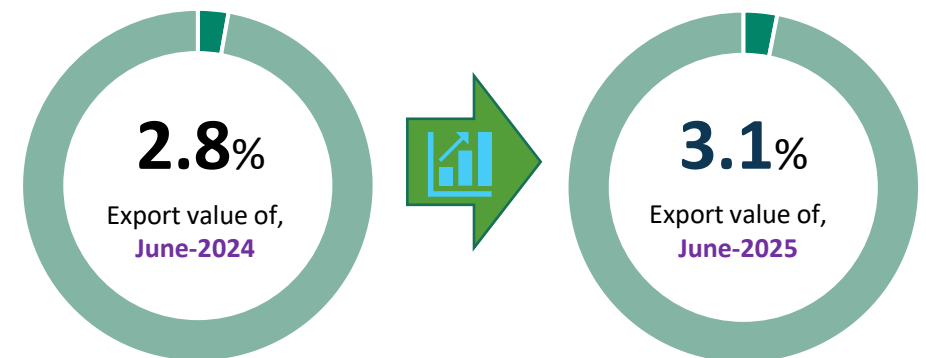
7.9 million USD more than the monthly average rate in 2024

Accumulated 6 months of 2025 reaches **121.8 million USD**, **59.9%** of total 2024

Percentage of export value to Japan, June-2025



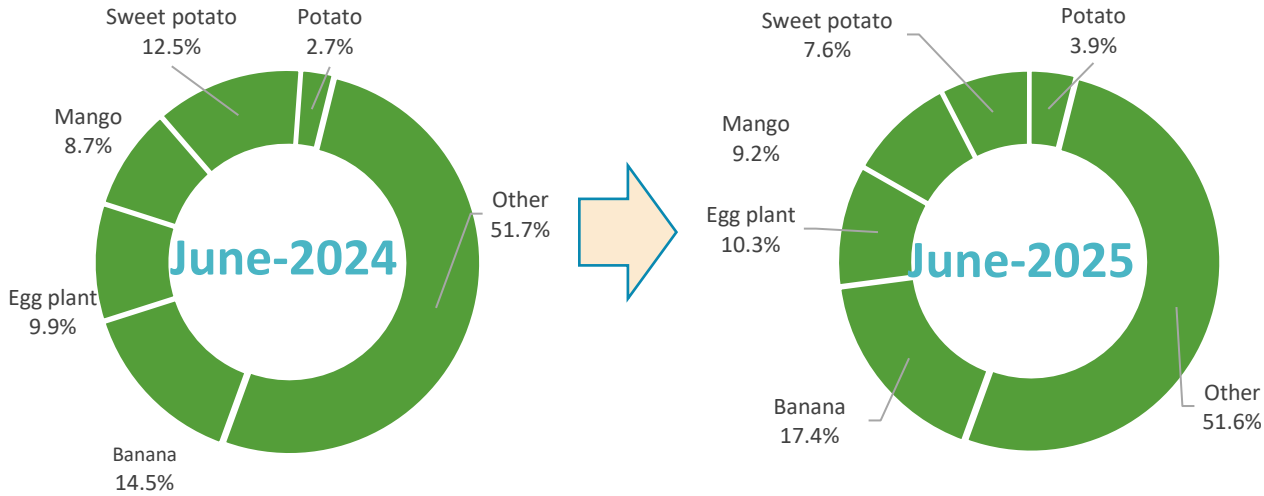
Changes in percentage of export value to Japan, June-2025





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to Japan, June-2025



Export results to Japan, June-2025



Banana

Value: **4.3** million USD

Increase **22.7%** compared to May-2025

Increase **55.9%** compared to June-2024



Eggplant

Value: **2.6** million USD

Increase **23.6%** compared to May-2025

Increase **36.8%** compared to June-2024



Mango

Value: **2.3** million USD

Increase **27.6%** compared to May-2025

Increase **37.6%** compared to June-2024



Sweet potato

Value: **1.9** million USD

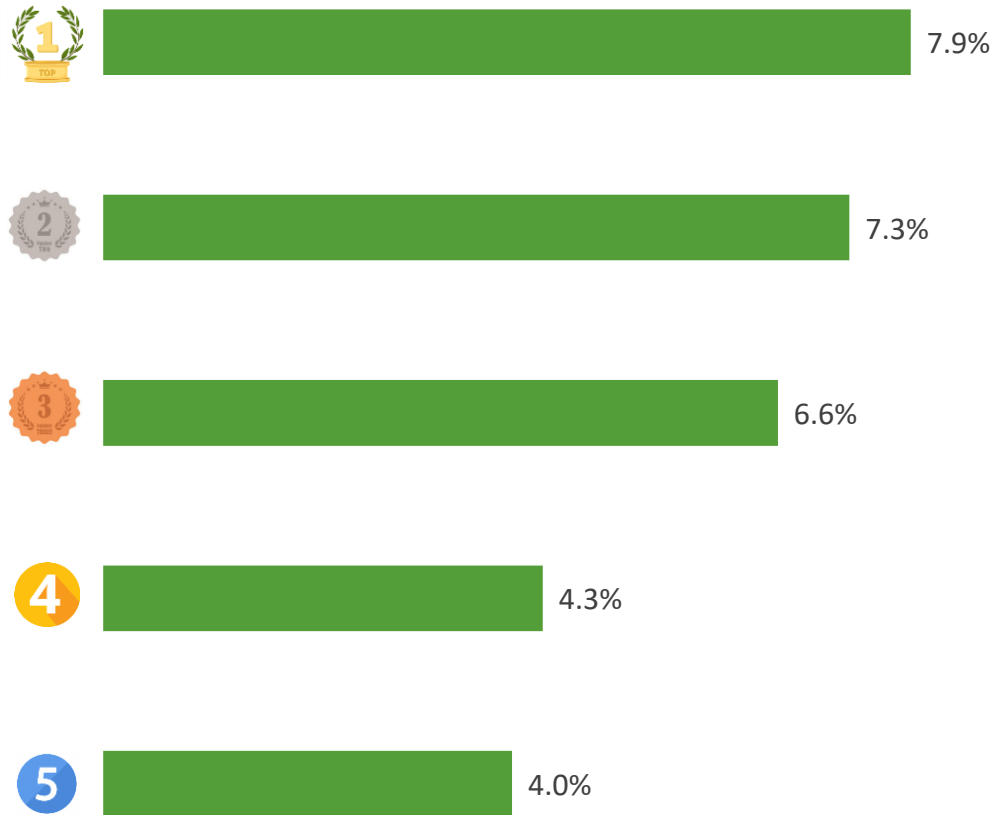
Decrease **9.8%** compared to May-2025

Decrease **20.6%** compared to June-2024

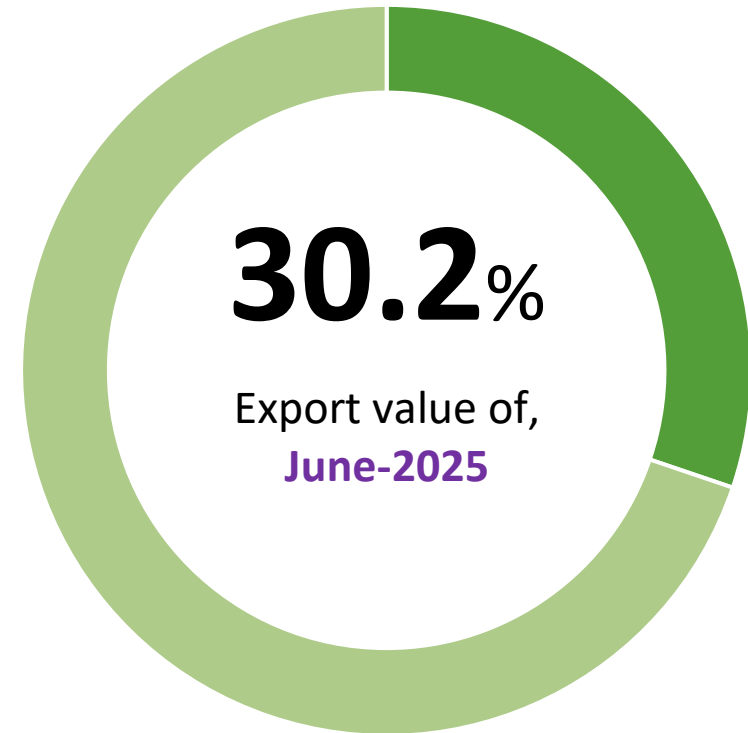


FRUITS AND VEGETABLES (EXPORT)

TOP 5 export enterprises by value to Japan, June-2025



Value ratio of TOP 5 export enterprises to Japan, June-2025





FRUITS AND VEGETABLES (IMPORT)

Import value from Japan, June-2025



Import results from Japan, June-2025

VALUE



0.3

million USD

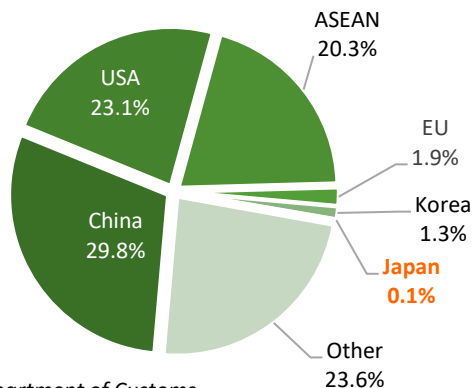
Decrease **22.8%** compared to May-2025

Decrease **8.1%** compared to June-2024

265.5 thousand USD less than the monthly average rate in 2024

Accumulated 6 months of 2025 reaches **2.5 million USD**, **37.9%** of total 2024

Percentage of import value from Japan, June-2025



Changes in percentage of import value from Japan, June-2025





Japan imports 5,500 tons of lettuce in the first 5 months of 2025

In the first 5 months of 2025, Japan imports 5,500 tons of lettuce, with value of 8.06 million USD, with an average price of 1,460 USD/ton. In 2024, Japan imports 6,400 tons, with value of 12.94 million USD, down 13.0% in volume and 12.7% in value compared to 2023. The average import price in 2024 is 2,020 USD/ton.

The largest exporters of lettuce to Japan in 2024 include the United States (accounting for 49.6% of the import value), the Asian region (30.7%), the Netherlands (5.3%), Mexico (4.4%), and Belgium (3.2%).

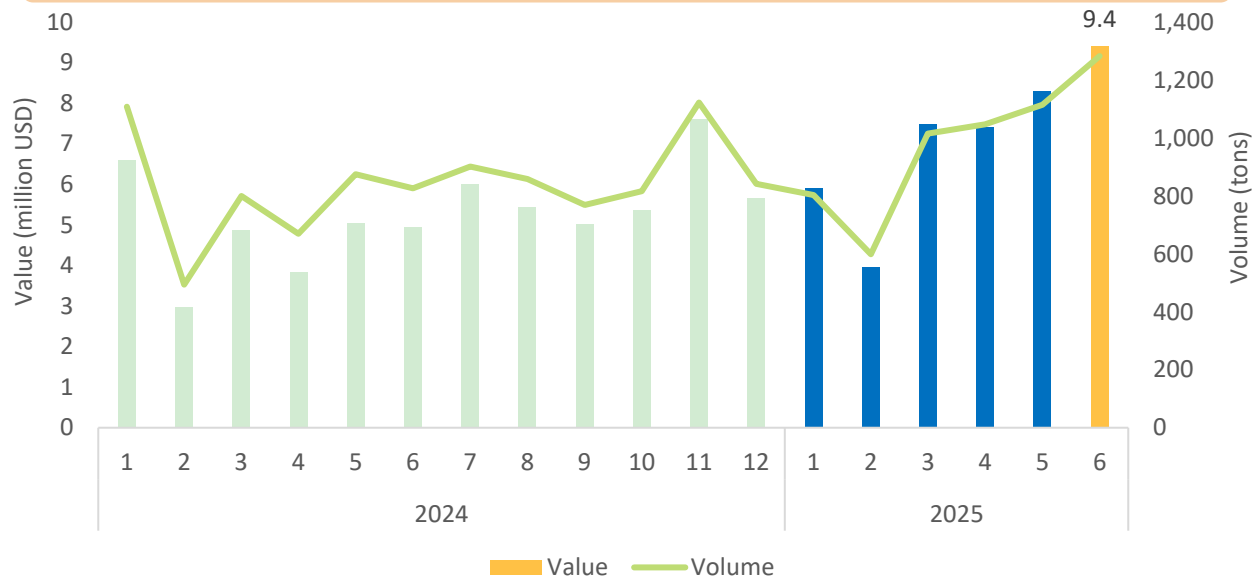
Source: Gtaic.ai



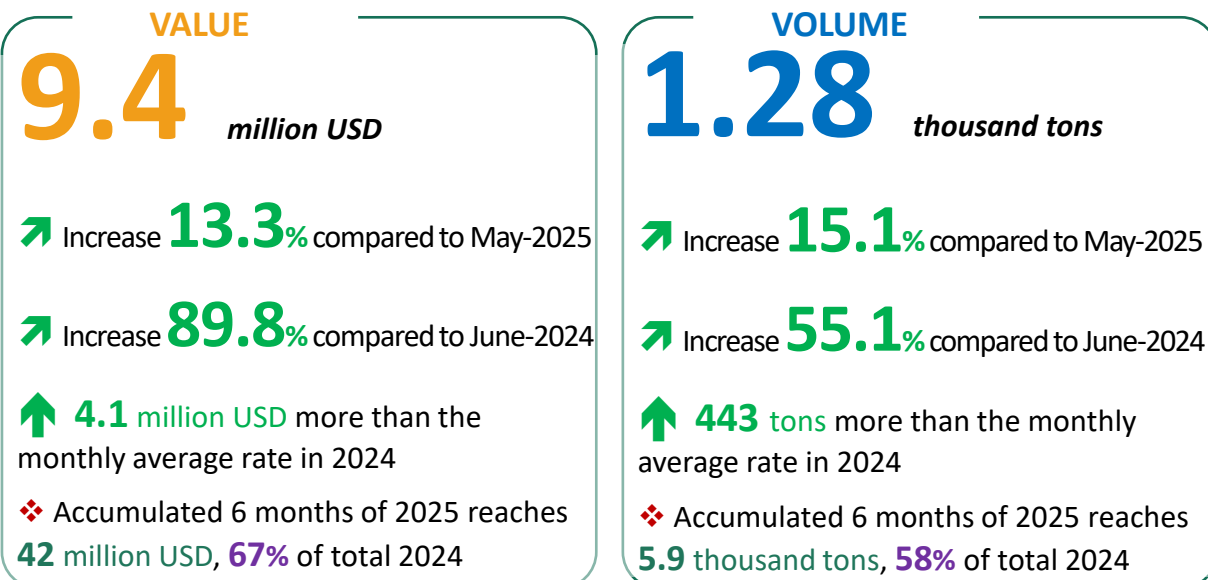


CASHEW NUTS

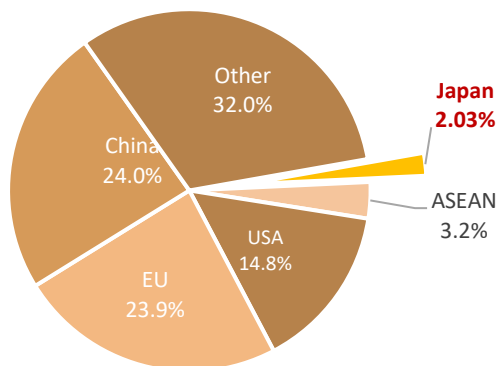
Export volume and value to Japan, June-2025



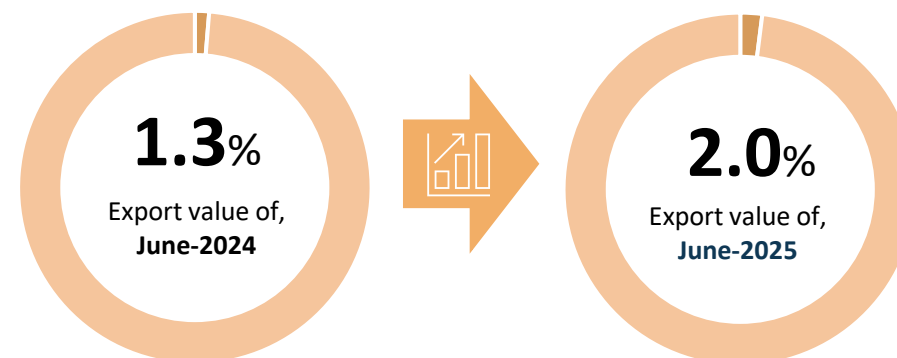
Export results to Japan, June-2025



Percentage of export value to Japan, June-2025



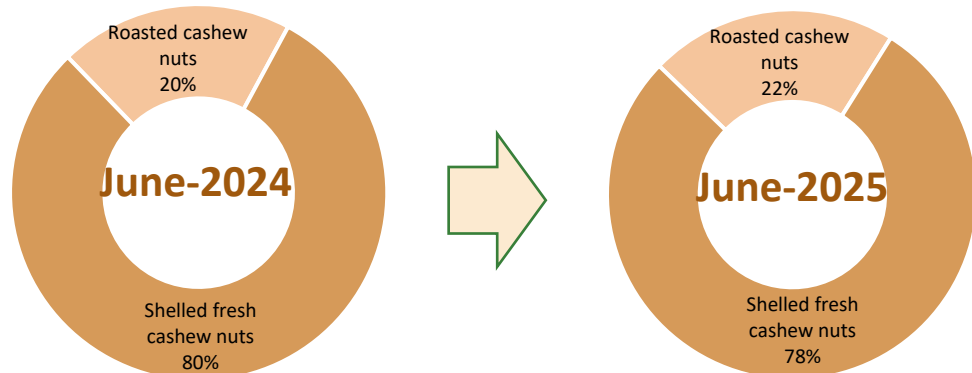
Changes in percentage of export value to Japan, June-2025



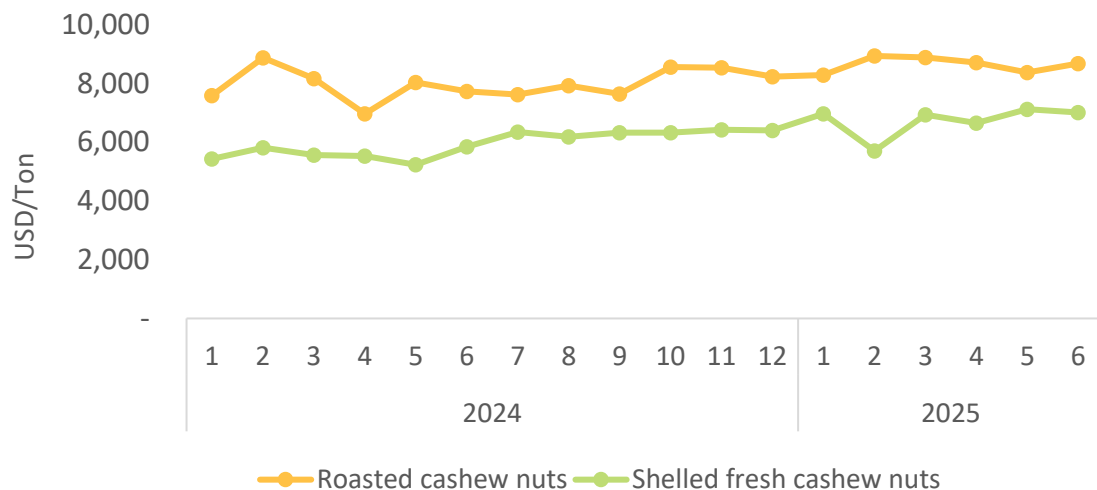


CASHEW NUTS

Structure of exports by products to Japan, June-2025



Average export cashew nuts price to Japan, June-2025



Export results to Japan, June-2025



Shelled fresh cashew nuts

Value: **7.36** million USD

Increase **24%** compared to May-2025

Increase **86%** compared to June-2024



Roasted cashew nuts

Value: **2.04** million USD

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

Increase **105%** compared to June-2024

Shelled fresh cashew nuts

The average export price in June-2025 is **7.005** USD/ton; decrease **1.5%** compared to previous month; and increase **20%** compared to the same month of 2024.

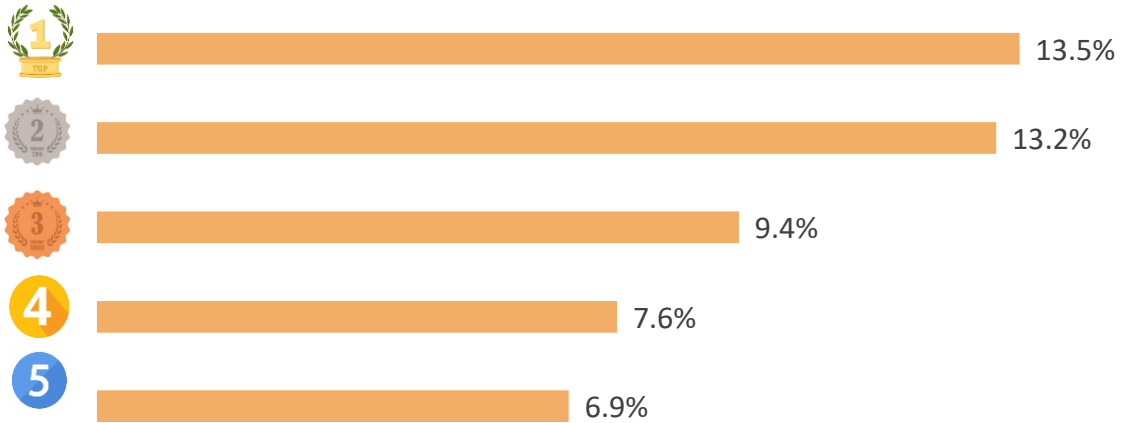
Roasted cashew nuts

The average export price in June-2025 is **8.361** USD/ton; increase **3.7%** compared to previous month; and increase **12,3%** compared to the same month of 2024.

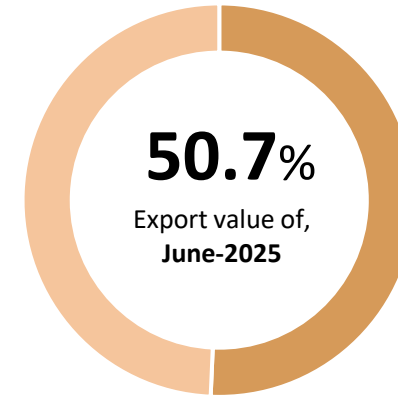


CASHEW NUTS

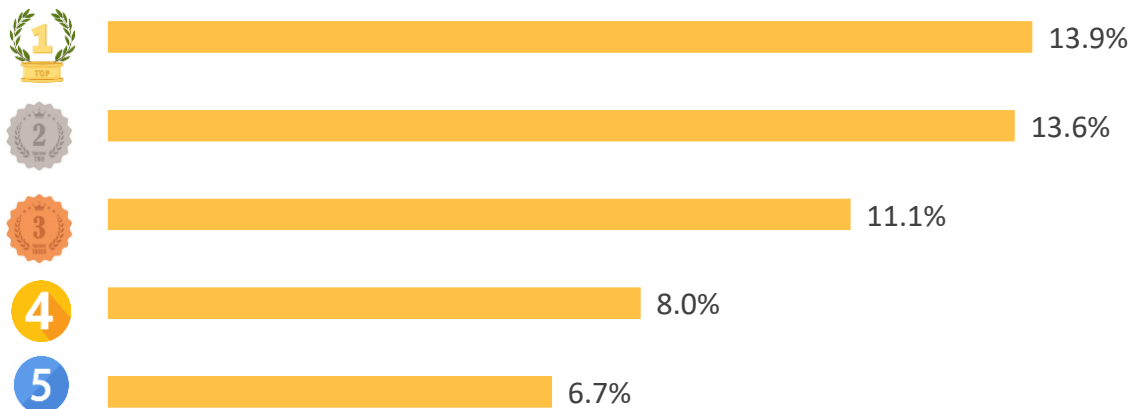
TOP 5 export enterprises by value to Japan, June-2025



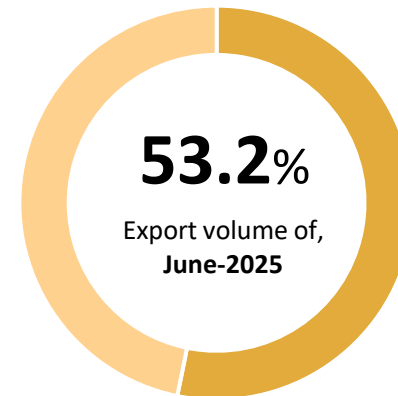
Value ratio of TOP 5 export enterprises to Japan, June-2025



TOP 5 export enterprises by volume to Japan, June-2025



Volume ratio of TOP 5 export enterprises to Japan, June-2025



CASHEW NUTS

SPOTLIGHTS



Signing Ceremony of Cambodia – Japan Cashew Nut Project at EXPO Osaka Kansai 2025

On July 5, within the framework of the "Cambodia National Day" event at the EXPO 2025 World Expo Osaka, Kansai (Japan), MIRARTH Holdings Group (Japan) organized a Memorandum of Understanding (LOI) signing ceremony with the Ministry of Trade of Cambodia.

At the same day, a member company of MIRARTH Holdings conducted a signing ceremony of a Memorandum of Understanding (MOU) with a business enterprise, and signed a product distribution contract to promote commercial activities in the field of cashew nut business.

MIRARTH Holdings affirms that it will continue to accompany and contribute positively to the sustainable development of Cambodia's cashew nut industry in the coming time.

Source: mainichi.jp



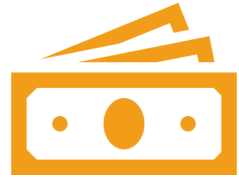


MEAT AND MEAT PRODUCTS (EXPORT)

Export value to Japan, June-2025



Export results to Japan, June-2025



VALUE

↘ Decrease **2%** compared to May-2025

↗ Increase **72%** compared to June-2024

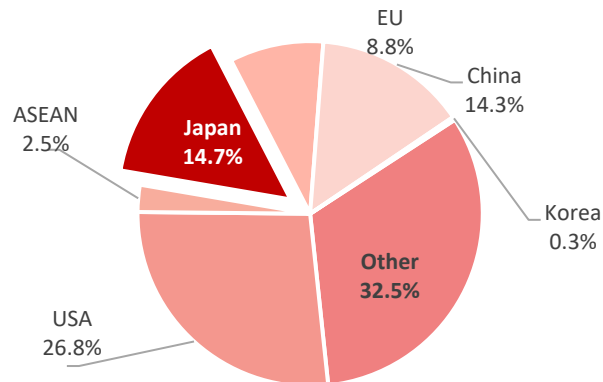
↗ **1,83 million USD** more than the monthly average rate in 2024

◇ Accumulated 6 months of 2025 reaches **25.7 million USD, 74.8%** of total 2024

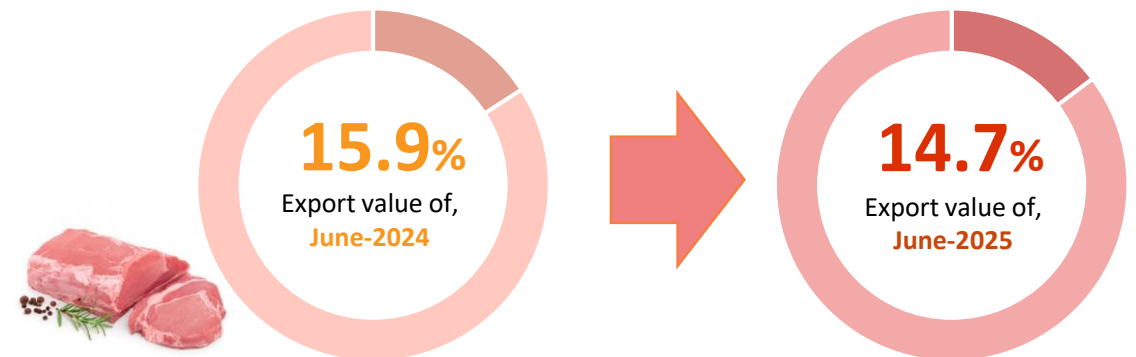
4.69

million USD

Percentage of export value to Japan, June-2025



Changes in percentage of export value to Japan, June-2025

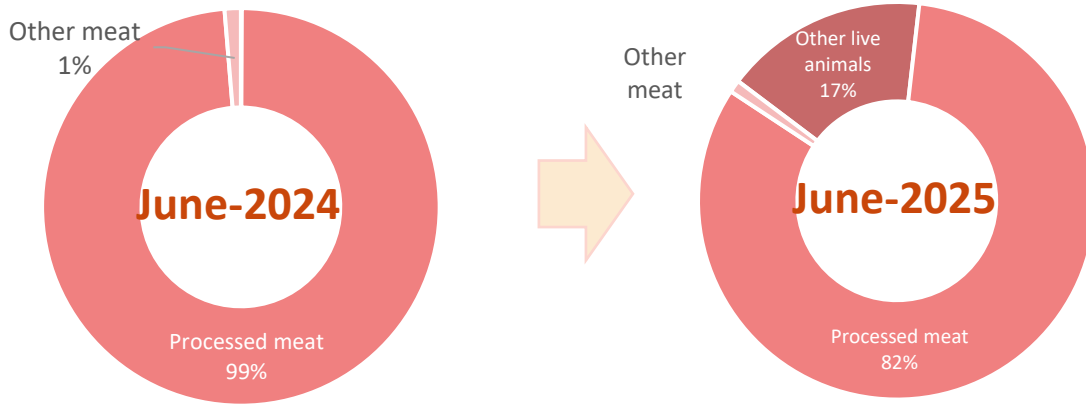


Source: Calculated from data of the Department of Customs



MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, June-2025



Export results to Japan, June-2025



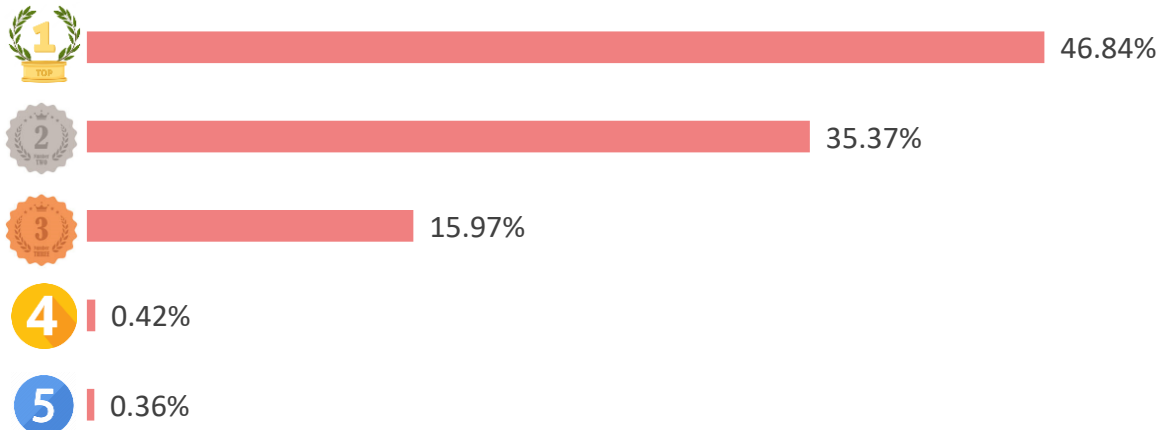
Processed meat

Value: **3.87** million USD

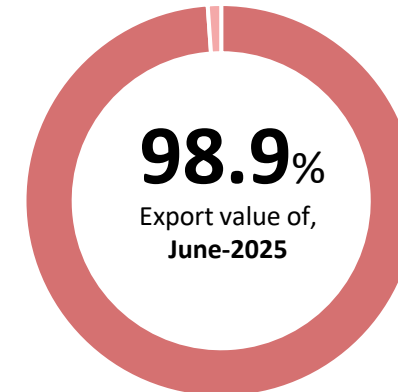
Decrease **17.2%** compared to May-2025

Increase **44.1%** compared to June-2024

TOP 5 export enterprises by value to Japan, June-2025



Value ratio of TOP 5 export enterprises to Japan, June-2025





Any comments. please send to:

CENTER FOR AGRICULTURAL AND ENVIRONMENTAL INFORMATION AND SERVICES

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