

# MONTHLY REPORT

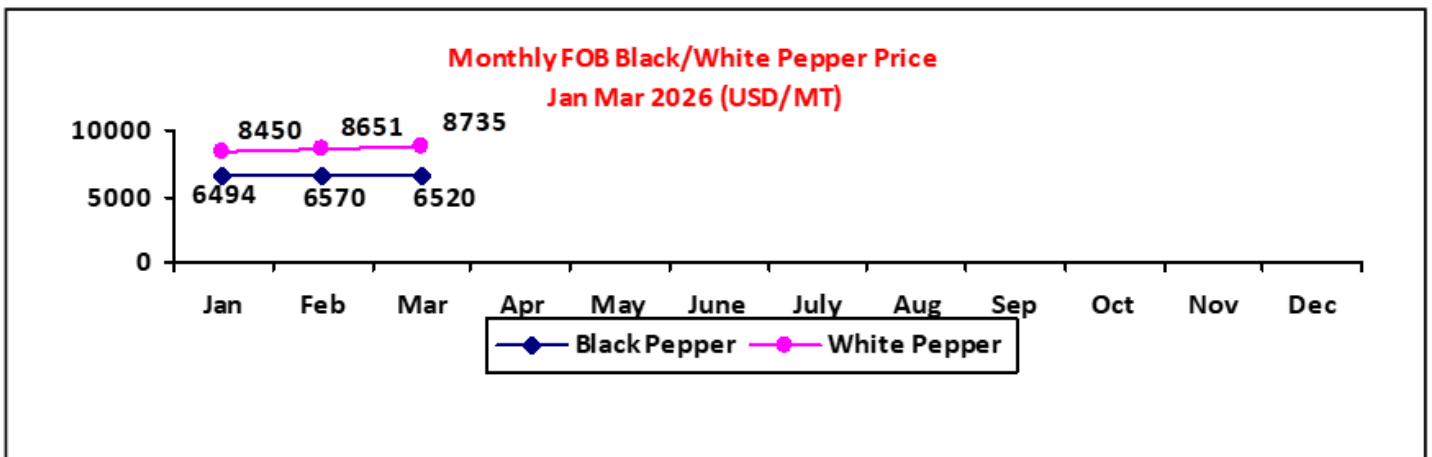
## MARCH 2026

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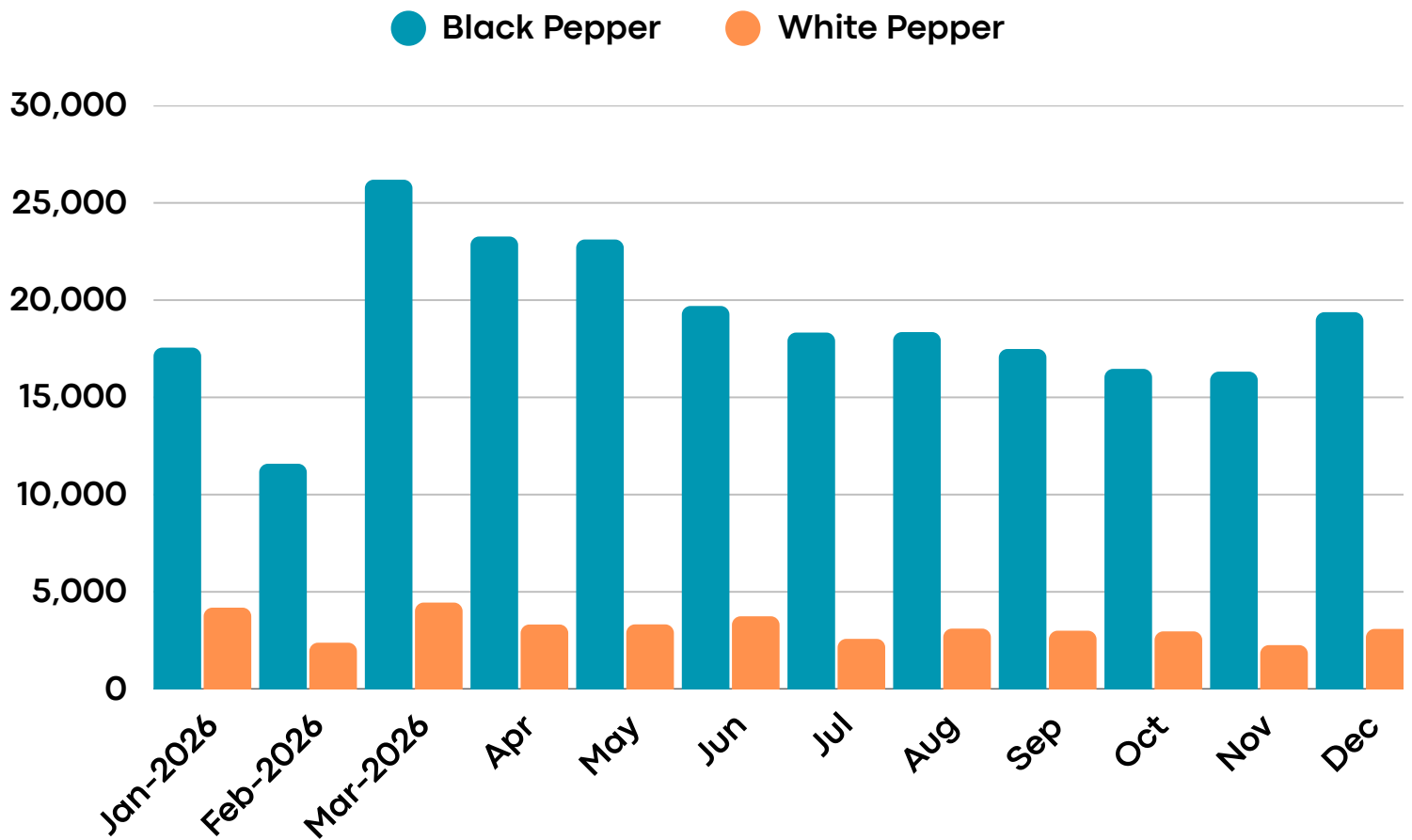
## 1. Vietnam Black & White Pepper:

- In March 2026, market showed an explosive growth in volume, as per preliminary statistics of VPSA, Vietnam exported **30,638 tons** of pepper all kinds consisting **26,190 tons of Black pepper** and **4,448 tons of White pepper**. The average export price of Black pepper is **6,520 USD/MT** (decreased 50\$ compared to Feb's) and White pepper is **8,735 USD/MT** (increased 84\$ - around 1% per ton compared to Feb's). Totally, compared to Feb 2026, the exports sharply increased more double 16,669 MT (up 119.3%), and the value grew 117.3%. However, compared to same period Mar 2025, exports only increased 51.3% and value rose 40.72%.



- For export markets, in Mar 2026, American still be the largest export market of Vietnam, imported 8,059 MT (accounted 26.3%, but sharp increased 121.3%), further second markets are China, bought 3,663 MT (accounted 12%, but remarkably rose 134.7%), and the third position Philippines 1316 MT (accounted 4.3% but strong up 183.6%), ranked the fourth Egypt 1298 MT (accounted 4.2% but up nearly tripled 294%); the fifth Thailand 1180 MT (accounted 3.9%, increased 57.8%). The volume in

March has increased strongly for every market upon importers bought to make up for February. The pepper market in early days April 2026 has slightly decreased and going sideways in narrow margin and possibly would get down more around 5% in this month.



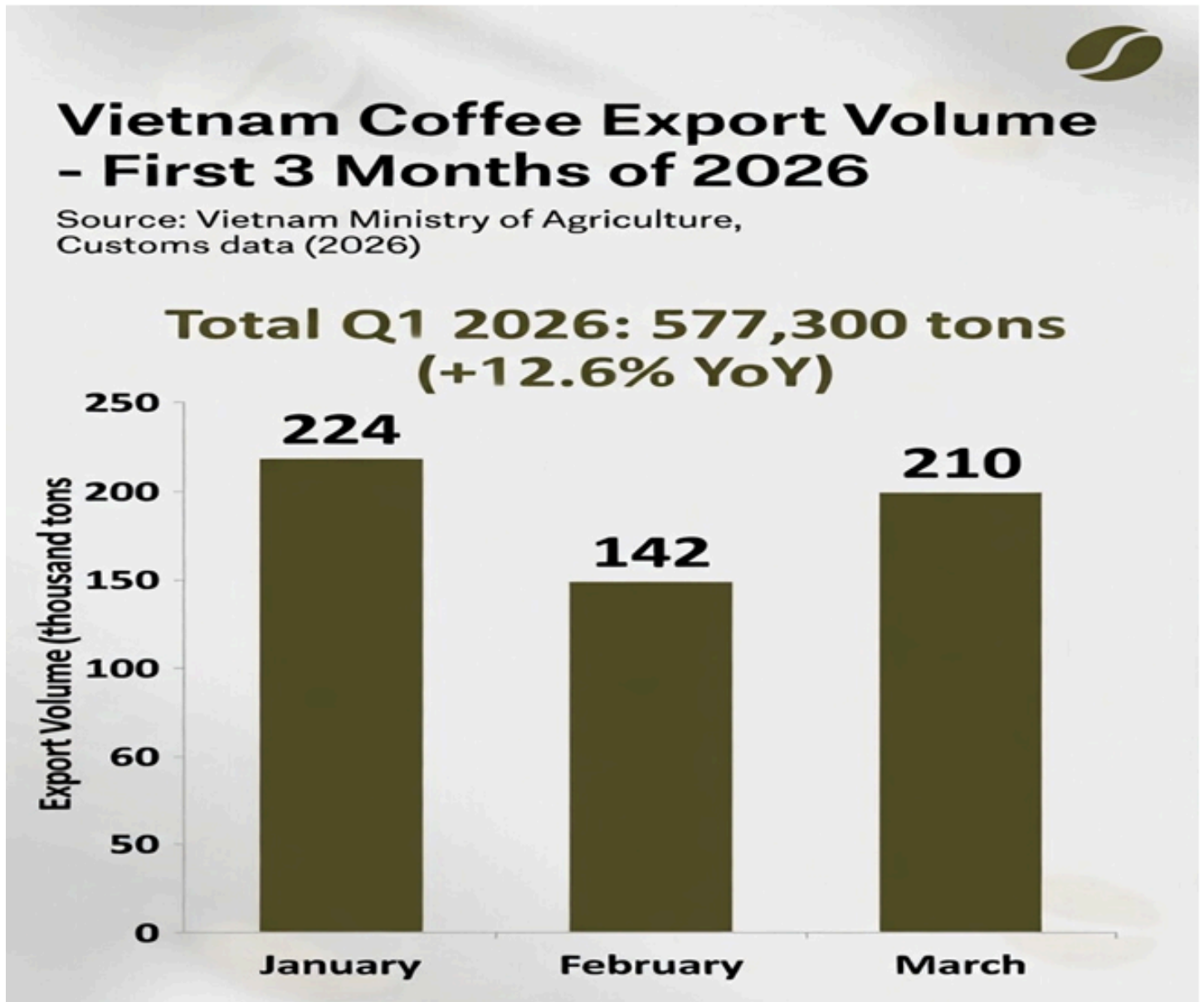
Note: Volume in Metric ton per month MT/month



## 2. Vietnam Robusta Coffee Beans:

- According to the Ministry of Agriculture and Environment, in March 2026, coffee exports are estimated to reach 210,000 tons, equivalent to US\$ 956.2 million. Cumulative exports for the first quarter of 2026 reached 577,300 tons with a value of US\$ 2.71 billion, an increase of 12.6% in volume but a decrease of 6.4% in value compared to the same period in 2025.
- The main reason is the sharp decline in the average export price, which is only about US\$ 4,696.8/MT, 16.9% lower than the same period. This clearly reflects the downward trend in the global coffee market as supply has improved, especially from Brazil, while demand has not increased correspondingly.

- Regarding markets, Germany, Italy, and Spain continue to be the three largest consuming partners of Vietnamese coffee, with market shares of 16.4%, 8.6%, and 7.6% respectively. Exports to Germany and Spain maintained growth, while those to Italy declined. Notably, China emerged as the fastest-growing market, doubling its growth compared to the same period last year, while the Philippines experienced a significant drop.



- On the global market, coffee prices also fluctuated downwards. Robusta prices on the London exchange fell sharply across many contract periods, while Arabica prices in New York also weakened. Although geopolitical factors such as transportation disruptions may increase logistics costs, they were not enough to reverse the price trend amidst global oversupply.

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