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HOẠT ĐỘNG XUẤT KHẨU CÀ PHÊ SANG THỊ TRƯỜNG NHẬT BẢN TRONG BỐI CẢNH HIỆP ĐỊNH VJEPa: THỰC TRẠNG VÀ GIẢI PHÁP

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Tóm tắt

Bài nghiên cứu nhằm tìm hiểu tác động của Hiệp định Đối tác Kinh tế Việt Nam - Nhật Bản (VJEPa) đối với xuất khẩu cà phê Việt Nam sang Nhật Bản, đồng thời đánh giá hiệu quả của hiệp định trong việc thúc đẩy thương mại và xác định những thách thức chủ yếu. Dựa trên dữ liệu thứ cấp và phân tích so sánh, nghiên cứu đánh giá xuất khẩu cà phê của Việt Nam trước và sau khi VJEPa có hiệu lực, đồng thời so sánh với các đối thủ cạnh tranh chính. Kết quả cho thấy, nhờ cắt giảm thuế quan và tạo điều kiện thuận lợi hơn cho thương mại, hiệp định này đã giúp tăng giá trị xuất khẩu và mở rộng cơ hội tiếp cận thị trường Nhật Bản cho cà phê Việt Nam. Tuy nhiên, rào cản phi thuế quan kéo dài, tiêu chuẩn chất lượng nghiêm ngặt và sự cạnh tranh gay gắt vẫn là những thách thức lớn, cản trở sự phát triển toàn diện của ngành. Từ những phân tích trên, nghiên cứu đề xuất một số giải pháp chiến lược cho doanh nghiệp xuất khẩu và cơ quan nhà nước có thẩm quyền, nhằm tận dụng tối đa lợi ích từ VJEPa và đảm bảo sự tăng trưởng bền vững cho ngành cà phê Việt Nam tại thị trường Nhật Bản.

Từ khóa: VJEPa, Việt Nam, Nhật Bản, xuất khẩu cà phê

COFFEE EXPORT TO THE JAPANESE MARKET UNDER THE VJEPa AGREEMENT: SITUATION AND RECOMMENDATIONS

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Abstract

This study examines the impact of the Vietnam-Japan Economic Partnership Agreement (VJEPA) on Vietnam's coffee exports to Japan, aiming to assess the agreement's effectiveness in enhancing trade and identifying key challenges. Using secondary data and comparative analysis, the study evaluates Vietnam's coffee export performance before and after VJEPA's implementation while benchmarking Vietnam's performance against major competitors. The research results show that VJEPA has contributed to increased export value and improved market access for Vietnamese coffee in Japan, driven by tariff reductions and enhanced trade facilitation. However, persistent non-tariff barriers, strict quality standards, and competitive disadvantages limit the full potential of Vietnam's coffee exports. Based on this impact analysis, the paper will offer strategic recommendations for Vietnamese exporters and policymakers to optimize the benefits of VJEPA and ensure sustainable growth in the Japanese coffee market.

Keywords: VJEPA, Vietnam, Japan, coffee export

1. Introduction

Vietnam is one of the world's leading coffee exporters, accounting for a significant share of the global market, with Japan being a key trading partner. In recent years, Japan has consistently ranked among the top importers of Vietnamese coffee, driven by its growing demand for high-quality coffee products and Vietnam's strong production capacity.

The Vietnam-Japan Economic Partnership Agreement (VJEPA), which came into effect on October 1, 2009, has played a crucial role in shaping Vietnam's coffee export landscape. Under the agreement, Japan has committed to eliminating or reducing tariffs on various Vietnamese coffee products, creating favorable conditions for export growth. These tariff reductions, along with improved trade facilitation measures, have strengthened Vietnam's position in the Japanese coffee market.

This research aims to assess the overall impact of VJEPA on Vietnam's coffee exports, identify key opportunities and challenges, and propose strategic recommendations to optimize the benefits of the agreement and enhance Vietnam's competitiveness in Japan.

2. Research Overview

2.1. Literature Review

2.1.1. Previous studies of Vietnam's exportation to Japan under VJEPA

Dang Quang Hieu (2022) examines structural changes in Vietnam-Japan trade under VJEPA, finding that it has strengthened Vietnam's trade position. Using Comparative Advantage and Trade Specialization theories, the study focuses on overall trade but lacks qualitative insights and sector-specific analysis, limiting targeted policy recommendations.

Huynh et al. (2022) investigate VJEPA's impact on Vietnam's garment exports using the Gravity Model and VECM with data from 2004 to 2019. The study confirms that Japan's GDP positively influences exports, while tariffs and trade restrictions hinder growth. However, its

focus on the garment sector and lack of qualitative insights make it less applicable to broader trade contexts.

Hoang Thi Hai Yen (2012) explores VJEPA's effects on Vietnam's agricultural exports through the Gravity Model and secondary data analysis. The study highlights tariff reductions as a driver of export growth but notes challenges like Japan's strict standards and high compliance costs. However, it does not fully account for policy changes, evolving market preferences, or long-term projections of VJEPA's impact.

Nguyen Quoc Phong (2022) analyzes trade and FDI trends from 2001 to 2020, confirming that VJEPA boosted exports and attracted Japanese FDI. The study emphasizes the need for an improved business environment and stronger bilateral agreements but lacks insights into recent trade dynamics, sector-specific impacts, and qualitative perspectives from businesses and policymakers.

2.1.2. Previous studies of Vietnam's coffee export

Vo, Yang, and Tran (2024) apply the Spatial Gravity Model to analyze factors affecting Vietnam's coffee exports (2005–2019) across 20 major trading partners. GDP growth and FTAs like EVFTA boost exports, while tariffs, NTMs, and exchange rate fluctuations hinder trade. However, the study's focus on the top 20 markets and lack of product differentiation limit its generalizability.

Nguyen et al. (2024) examine Vietnam's role in the global coffee value chain, highlighting its dominance in Robusta coffee, which reached 36% of global exports in 2023. The study stresses the need for better branding and marketing but lacks detailed data on other coffee varieties and future market trends.

Le et al. (2024) explore Vietnam's coffee exports to the EU (2010–2023), finding that technological advancements and EVFTA support trade. However, the study exclusively focuses on the EU market, limiting insights into how different trade agreements impact the industry.

Nguyen Thi Thu Hien (2022) investigates NTMs on coffee exports (2011–2019) using the Gravity Model, and finds that Japan's GDP positively influences Vietnam's exports, while tariff barriers and trade restrictions have adverse effects. The research confirms VJEPA's role in promoting exports but is limited by its exclusive focus on the garment sector, and lack of qualitative analysis.

2.1.3. Justifications of research gap

While VJEPA's impact on Vietnam-Japan trade has been studied, research on VJEPA's impact on Vietnam-Japan trade is limited, especially for coffee exports. Most studies focus on overall trade, leaving a gap in understanding how VJEPA influences Vietnam's coffee market in Japan.

Additionally, existing research relies heavily on quantitative methods, lacking qualitative insights into the real challenges exporters face, such as regulatory barriers and market strategies. A qualitative method approach is needed for a deeper analysis.

Lastly, while some studies explore factors affecting Vietnam’s coffee exports, few examine VJEPA’s direct impact. Trade agreements are often briefly mentioned rather than analyzed in depth, creating a gap in assessing how VJEPA’s tariff reductions and trade facilitation measures shape coffee exports to Japan.

3. Research methodology and scope

3.1. Research methodology

The study employs a qualitative research methodology, utilizing secondary data from reputable sources such as scientific journals, government websites, and international trade organizations. A comparative analysis is conducted to assess Vietnam’s coffee export trends to Japan before and after the implementation of VJEPA, with a particular focus on identifying opportunities and challenges. To contextualize Vietnam’s position in the Japanese market, the study analyzes its export performance against leading coffee-exporting countries, including Brazil, Colombia, and Indonesia. Furthermore, the study formulates targeted policy recommendations for key governmental bodies, such as the Ministry of Industry and Trade and the Ministry of Agriculture and Environment, alongside strategic recommendations for Vietnamese coffee exporters, aiming to enhance their capacity to leverage the benefits of VJEPA effectively.

3.2. Data selection and scope

To ensure analytical precision, this study selects HS codes 090111 (non-roasted, non-decaffeinated coffee) and 210111 (coffee extracts, essences, and concentrates) as the primary focus. These categories provide a structured analysis of both raw and processed coffee exports under VJEPA, ensuring methodological consistency and policy relevance.

HS 090111 holds the largest share within HS 0901, making it the most representative code for analyzing Vietnam’s raw coffee exports to Japan. The table below illustrates its proportion over the years, confirming its dominance in the category:

Table 1. HS 090111’s share in HS 0901 of Vietnam’s exports to Japan from 2005 to 2024

Unit: US Dollar thousand

	HS 090190	HS 090122	HS 090112	HS 090121	HS 090111	Percentage of HS 090111
2005	0	0	0	433	25,999	98,362%
2006	0	0	0	406	39,921	98,993%
2007	0	0	0	223	76,661	99,710%
2008	0	0	0	191	125,050	99,847%
2009	0	0	0	1,919	96,566	99,998%
2010	0	0	0	1,945	89,120	99,998%

	HS 090190	HS 090122	HS 090112	HS 090121	HS 090111	Percentage of HS 090111
2011	0	0	57	1,746	133,689	99,956%
2012	0	0	0	892	171,882	99,484%
2013	0	2	0	798	169,331	99,530%
2014	0	5	417	748	164,985	99,296%
2015	23	6	1,076	771	155,746	99,488%
2016	0	5	1,306	1,315	178,627	99,996%
2017	0	10	887	1,383	198,061	98,862%
2018	223	2	1,052	1,551	186,186	99,878%
2019	322	10	1,191	1,498	141,239	99,764%
2020	33	5	490	5,304	164,047	99,676%
2021	11	0	1,474	6,440	175,662	99,989%
2022	0	0	1,825	7,914	225,100	99,996%
2023	0	240	1,400	19,001	239,883	99,892%
2024	11	382	3,277	20,936	352,432	99,882%

Source: ITC calculations based on Japanese Ministry of Finance statistics

Since HS 090111 consistently accounts for the majority of HS 0901 exports, it serves as the most suitable proxy for analyzing the impact of VJEPA on Vietnam's raw coffee trade.

Meanwhile, HS 210111 is selected due to its significant export fluctuations after VJEPA (as analyzed in this study), indicating a potential causal relationship with tariff reductions and trade facilitation. Unlike broader categories such as HS 2101, which include non-coffee products, HS 210111 focuses specifically on coffee-based extracts and concentrates, making it more relevant for assessing Vietnam's processed coffee trade in Japan.

3.3. Research Objectives

This study aims to assess the impact of the Vietnam-Japan Economic Partnership Agreement (VJEPA) on Vietnam's coffee exports to Japan, evaluating its effectiveness in enhancing trade and identifying key challenges. It examines how VJEPA commitments, including tariff reductions and trade facilitation measures, have influenced Vietnam's coffee export performance. To achieve this, the study sets the following objectives:

- i. Analyzing VJEPA's commitments related to Vietnam's coffee exports and their role in facilitating trade with Japan.
- ii. Evaluating the impact of VJEPA on Vietnam's coffee export performance, including benefits, challenges, and trade barriers.

- iii. Proposing strategic recommendations for Vietnamese exporters and policymakers to leverage VJEPA and ensure sustainable growth in the Japanese coffee market.

4. Overview of the VJEPA

4.1. Key provisions of VJEPA

4.1.1. Main contents of VJEPA

The Vietnam-Japan Economic Partnership Agreement (VJEPA) was signed on December 25, 2008, and came into effect on October 1, 2009. The VJEPA consists of 14 chapters, 129 articles, and 7 annexes, focusing on trade, investment, and business environment improvements. Key aspects include trade in goods (tariff commitments, rules of origin, trade remedies, SPS, TBT, and customs procedures), trade in services, and investment protection. Its goal is to liberalize trade, boost economic cooperation, and enhance competitiveness. (Vietnam Trade Information Portal, 2023).

Under VJEPA, Vietnam committed to eliminating about 92% of tariff lines over 16 years, with 27.5% abolished immediately, 40.3% after 10 years, 14.9% after 15 years, and 0.8% after 16 years. (WTO Center Vietnam, 2023). In return, Japan agreed to liberalize 94.53% of trade turnover within 10 years (WTO Center Vietnam, 2023). Rules of origin ensure that only Vietnamese and Japanese goods receive preferential tariffs.

As Vietnam's first bilateral FTA, it encompasses various areas of cooperation, including trade in goods, services, investment, and improvement of the business environment, aiming to promote trade and investment liberalization, and enhance economic cooperation between two nations (Ministry of Industry and Trade, 2023).

4.1.2. Provisions related to agricultural trade

The Vietnam-Japan Economic Partnership Agreement (VJEPA) includes key provisions related to agricultural trade, aiming to promote cooperation and enhance the exchange of goods between the two countries. Specifically, Japan committed to eliminating tariffs on 36% of agricultural tariff lines immediately upon the agreement's enforcement in 2009. The remaining tariff lines are to be gradually reduced, targeting the elimination of tariffs on 83.8% of Vietnam's agricultural trade value within 10 years (VnEconomy, 2008). However, certain sensitive products, such as rice, meat, and dairy products, are reserved by Japan and are subject to tariff quotas or other non-tariff measures.

For Vietnam, the commitment to eliminate tariffs on imports from Japan is implemented according to a schedule, with 41.78% of tariff lines removed starting in 2018, reaching 90.64% by 2026 (Ministry of Industry and Trade, 2023). The implementation of these commitments facilitates market access for agricultural products, while promoting the development of the agricultural sector and enhancing the competitiveness of Vietnamese products in the international market.

4.2. Commitments of VJEPA related to coffee exports

4.2.1. Tariff commitments

Vietnam's Commitment to Tariff Elimination

Under VJEPA, Vietnam has pledged to progressively eliminate tariffs on Japanese goods. By 2018, 41.78% of tariff lines were abolished, with a target of reaching 90.64% by 2026 (VNTR, 2023). This phased approach aims to enhance market access for Japanese products, fostering a more competitive trading environment.

Japan's Commitment to Tariff Elimination

Japan has reciprocated by committing to significant tariff reductions on Vietnamese exports. Upon the agreement's inception, Japan eliminated tariffs on 7,220 Vietnamese products, including key agricultural commodities such as coffee (Viipip, 2023). This immediate action was designed to bolster Vietnam's export potential in the Japanese market. The phased tariff elimination is structured as follows:

Table 2. Japan's tariff reduction for coffee imports from Vietnam under the Vietnam-Japan Economic Partnership Agreement (VJEPA)

HS Code		Description	Japan's Tariff			
			Common	WTO	GSP	VJEPA
090111	000	Coffee (excl. roasted and decaffeinated)	0%	0%	0%	0%
090112	000	Decaffeinated coffee (excl. roasted)	0%	0%	0%	0%
090121	000	Roasted coffee (excl. decaffeinated)	20%	12%	10%	1,9%
090122	000	Roasted, decaffeinated coffee	20%	12%	10%	1,9%
090190	100	Coffee husks and skins	0%	0%	0%	0%
090190	200	Coffee substitutes containing coffee in any proportion	20%	12%	0%	0%
210111		Extracts, essences and concentrates, of coffee				
210111	110	Containing not less than 50% by weight of sucrose	24%	24%	15%	14,5%
210111	190	Other	24%	24%	15%	24%
210111	210	Instant coffee	12,3%	8,8%	15%	0%
210111	290	Other	16%	15%	0%	0%
210112		Preparations with a basis of extracts, essences or				

HS Code		Description	Japan's Tariff			
			Common	WTO	GSP	VJEPA
		concentrates of coffee or with a basis of coffee				
210112	111	Containing not less than 50% by weight of sucrose	24%	24%	15%	1%
210112	112	Other	24%	24%	15%	24%
210112	121	Instant coffee	12,3%	8,8%	15%	0%
210112	122	Other	16%	15%	0%	0%

Source: Japanese Ministry of Finance statistics

4.2.2. Non-tariff commitments

Beyond tariff alleviation, VJEPA addresses non-tariff barriers to streamline trade processes and ensure product compliance. Key non-tariff commitments include:

- Simplification of customs procedures: Both countries have agreed to enhance customs efficiency by reducing clearance times and associated costs.
- Harmonization of standards and technical regulations: Collaborative efforts have been made to align quality and safety standards for coffee products, minimizing technical discrepancies and facilitating smoother trade.
- Cooperation in sanitary and phytosanitary measures: Joint initiatives focus on plant quarantine and food safety, ensuring that Vietnamese coffee exports meet Japan's stringent health and safety requirements.

4.2.3. Rule of Origin

To qualify for preferential tariffs under VJEPA, coffee products must meet specific rules of origin. The agreement stipulates that coffee must be **wholly obtained or produced in Vietnam**. This means:

- The coffee beans must be grown and harvested entirely within Vietnam.
- Processing activities, such as roasting or grinding, must also take place in Vietnam

Typically, a product is considered originating if it has a Regional Value Content (RVC) of at least 40%

$$RVC = \left(\frac{VOM}{FOB} \right) \times 100$$

Note:

- RVC = Regional Value Content (%)
- VOM = Value of originating materials, direct labor costs, and direct overhead costs (value added within the exporting country)
- FOB = Free on Board price of the final product

In summary, under VJEPA, to qualify for preferential tariffs, coffee products must either:

- Regional Value Content (RVC): minimum 40%, or
- HS code conversion (CTC): conversion at 4-digit level (CTH – non-originating materials must belong to a different HS Group than the HS Group of the finished product).

VJEPA Certificate of Origin is Form VJ C/O. All Form VJ C/O are currently issued in paper form. VJ C/O can be issued before, during or after the time of export of goods. VJEPA does not have any provisions on Self-Certification of Origin (VNTR, n.d).

5. Export situation to Japan before and after VJEPA

5.1. Export situation of coffee to Japan before implementation VJEPA

5.1.1. Export situation

Table 3. Vietnam's coffee exports to Japan from 2005 to 2009

Year	HS code: 090111			HS code: 210111		
	Export value (USD thousand)	Quantity (Tons)	Growth rate based on export value (%)	Export value (USD thousand)	Quantity (Tons)	Growth rate based on export value (%)
2005	25,999	28,210	-	0	-	-
2006	39,921	31,325	53.55%	5	0	-
2007	76,661	44,484	92.03%	0	-	-
2008	125,050	55,055	63.12%	0	-	-
2009	96,566	57,865	-22.78%	62	11	-

Source: ITC calculations based on Japanese Ministry of Finance statistics

Between 2005 and 2009, Vietnam's exports of coffee (HS code: 090111 – excluding roasted and decaffeinated) and coffee-related products (HS code: 210111 – extracts, essences, and concentrates of coffee) to Japan experienced significant fluctuations.

In 2005, Vietnam exported 28,210 tons of coffee under HS code 090111, generating \$26 million in revenue. Over the next three years, both quantity and value increased steadily, peaking in 2008 at 55,055 tons and \$125 million. This growth was driven by rising global coffee demand, Vietnam's expanding role as a key supplier, and increasing coffee consumption in Japan. Additionally, global coffee prices surged due to supply constraints in major coffee-producing countries like Brazil and Colombia (Báo Nhân Dân, 2007). However, in 2009, despite a further increase in export volume to 57,865 tons, total export value declined by 22.78% to \$96.6 million, largely due to the global financial crisis, which led to reduced consumer spending and lower coffee prices worldwide (Food and Agriculture Organization, 2009).

For HS code 210111, which covers coffee extracts, essences, and concentrates, exports remained minimal until 2006, when Vietnam recorded \$5,000 in export value. No exports were reported in 2007 and 2008. However, in 2009, exports surged to \$62,000, with 11 tons of product shipped. This sudden increase may have been influenced by the Vietnam-Japan Economic Partnership Agreement (VJEPA), which took effect on October 1, 2009. The agreement reduced tariffs and improved market access for Vietnamese coffee products, potentially boosting demand for processed coffee exports to Japan.

5.1.2. Comparative analysis of Vietnam's exported coffee among leading Japan exporters

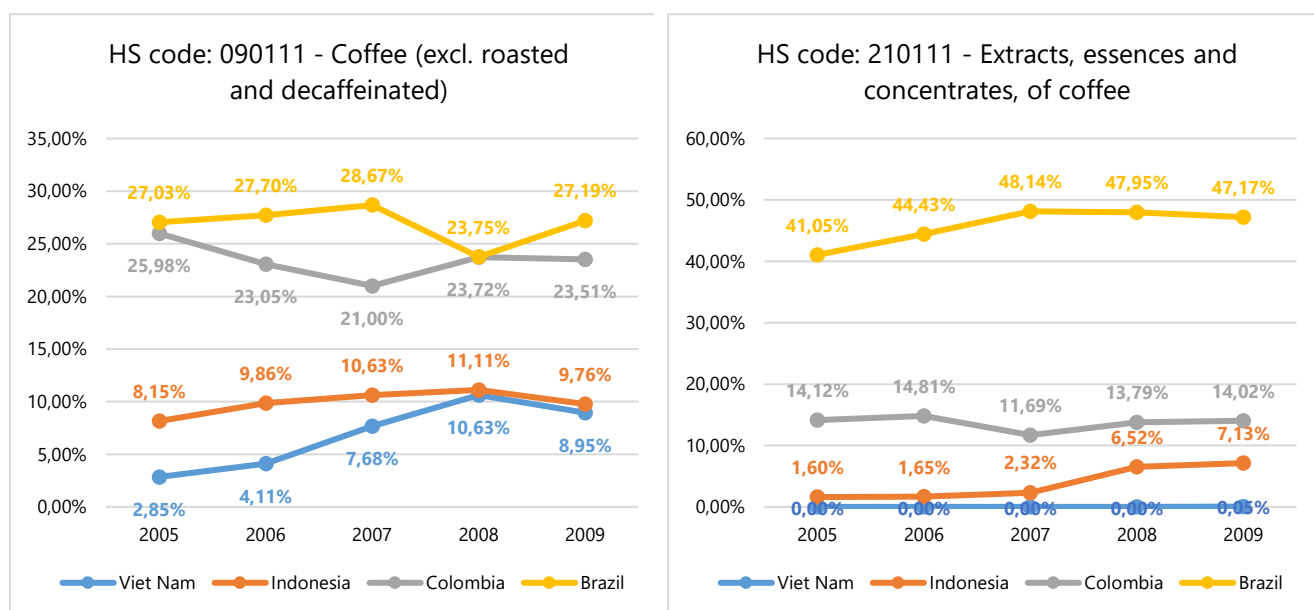


Figure 1. Vietnam, Indonesia, Colombia and Brazil exported coffee market share in Japan from 2005 to 2009 (based on the export value)

Source: ITC calculations based on Japanese Ministry of Finance statistics

Before the implementation of VJEPA, Vietnam's share in Japan's coffee imports (HS code 090111 – excluding roasted and decaffeinated) remained modest, rising from 2.85% in 2005 to 10.63% in 2008 before dipping to 8.95% in 2009. Despite this growth, Vietnam trailed Brazil and Colombia, due to their well-established reputations and high-quality Arabica coffee, both maintaining stable shares above 20%. Indonesia, with its established presence and specialty varieties, fluctuated between 8.15% and 11.11%.

For HS code 210111 (coffee extracts, essences, and concentrates), Vietnam had an almost negligible presence, with a market share consistently at or near 0.00% from 2005 to 2009. In contrast, Brazil dominated at around 47%, and Indonesia grew from 1.60% in 2005 to 7.13% in 2009. The success of Brazil and Indonesia highlights Japan's preference for suppliers with strong processing capabilities, an area where Vietnam remained underdeveloped.

5.1.3. Assessment of the export situation before VJEPA

Before VJEPA, Vietnam's coffee exports to Japan were limited, with gradual improvements. The country primarily exported unprocessed coffee (HS 090111), while processed coffee (HS 210111) remained minimal.

Several factors hindered growth. The 2007–2008 financial crisis reduced demand and slowed exports. Vietnam's focus on raw Robusta beans, unlike Brazil and Colombia's high-quality Arabica, limited its competitiveness in Japan's premium market. Additionally, its underdeveloped processed coffee sector struggled to meet Japan's rising demand for instant and specialty coffee. Strict Japanese import regulations, particularly on pesticide residues and food safety, created further barriers, especially for processed coffee.

Despite these challenges, Vietnam's coffee industry had growth potential. To compete effectively in Japan, it needed to invest in processing technology, enhance quality control, and strengthen its brand presence.

5.2. Export situation to Japan after VJEPA

5.2.1. Export situation

Table 4. Vietnam's coffee exports to Japan from 2010 to 2024

	HS code: 090111			HS code: 210111		
Year	Export value (USD thousand)	Quantity (Tons)	Growth rate based on export value (%)	Export value (USD thousand)	Quantity (Tons)	Growth rate based on export value (%)
2010	89,120	54,737	-7.71%	1,044	188	1583.87%
2011	133,689	52,892	50.01%	3,141	427	200.86%
2012	171,882	75,725	28.57%	5,369	682	70.93%
2013	169,331	79,473	-1.48%	7,613	1,043	41.80%
2014	164,985	78,566	-2.57%	16,540	2,641	117.26%
2015	155,746	80,968	-5.60%	19,880	3,056	20.19%
2016	178,627	98,798	14.69%	23,575	3,563	18.59%
2017	198,061	88,081	10.88%	24,715	3,574	4.84%
2018	186,186	98,188	-6.00%	31,237	4,730	26.39%
2019	141,239	86,707	-24.14%	26,632	3,751	-14.74%
2020	164,047	100,157	16.15%	29,767	4,407	11.77%
2021	175,662	99,848	7.08%	34,061	4,796	14.43%
2022	225,100	105,217	28.14%	61,539	7,550	80.67%
2023	239,883	98,726	6.57%	62,830	7,640	2.10%

2024	352,432	96,753	46.92%	89,708	9,024	42.78%
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Source: ITC calculations based on Japanese Ministry of Finance statistics

Vietnam's coffee exports to Japan have shown significant fluctuations from 2010 to 2024, shaped by trade agreements and shifting global market conditions. In 2010, exports under HS code 090111 (excluding roasted and decaffeinated) dropped by 7.71%, reflecting initial competition pressures. However, HS code 210111 (coffee extracts, essences, and concentrates) surged by an astounding 1583.87%, reaching \$1.044 thousand at 188 tons, as Vietnam leveraged tariff reductions under VJEPA, signaling the beginning of a long-term upward trajectory.

During 2018 to 2019, both categories saw declines, with growth rates slipping below 0%. According to The United States Department of Agriculture (USDA), this decline was due to global oversupply, falling coffee prices, and concerns over the quality of Vietnamese coffee, which struggled to compete in Japan's high-end market (Rainforest Alliance, 2020). The market rebounded in 2020, HS code 090111 grew 16.15% to \$164.047 thousand at 100.157 tons, followed by steady increases in 2021 and 2022. HS code 210111 also experienced substantial growth, reaching 80.67% in 2022. The upward trend was supported by Vietnam's improvements in coffee processing and branding, making its products more competitive in the Japanese market (Tran, Nguyen and Pham, 2025). Contributing to the upward trend, CPTPP also creates opportunities and favorable conditions for enhancing bilateral trade cooperation, particularly given their complementary trade structures (VietnamPlus, 2022)

By 2024, Vietnam's coffee exports had surged dramatically, with HS code 090111 up 46.92% to \$352.432 thousand, and HS code 210111 rising 42.78% to \$89.708 thousand. This growth was fueled by rising global coffee prices due to extreme weather in major producing regions like Brazil and Vietnam (News.com.au, 2024). Additionally, ongoing efforts to enhance coffee quality and branding helped Vietnam strengthen its position in the Japanese market (Vietnam Briefing, 2024). The VJEPA has continued to provide favorable conditions by maintaining reduced tariffs, ensuring Vietnamese coffee stays competitive despite market challenges, reinforcing Vietnam's growing dominance in Japan's coffee market.

5.2.2. Comparative analysis of Vietnam's exported coffee among leading Japan exporters

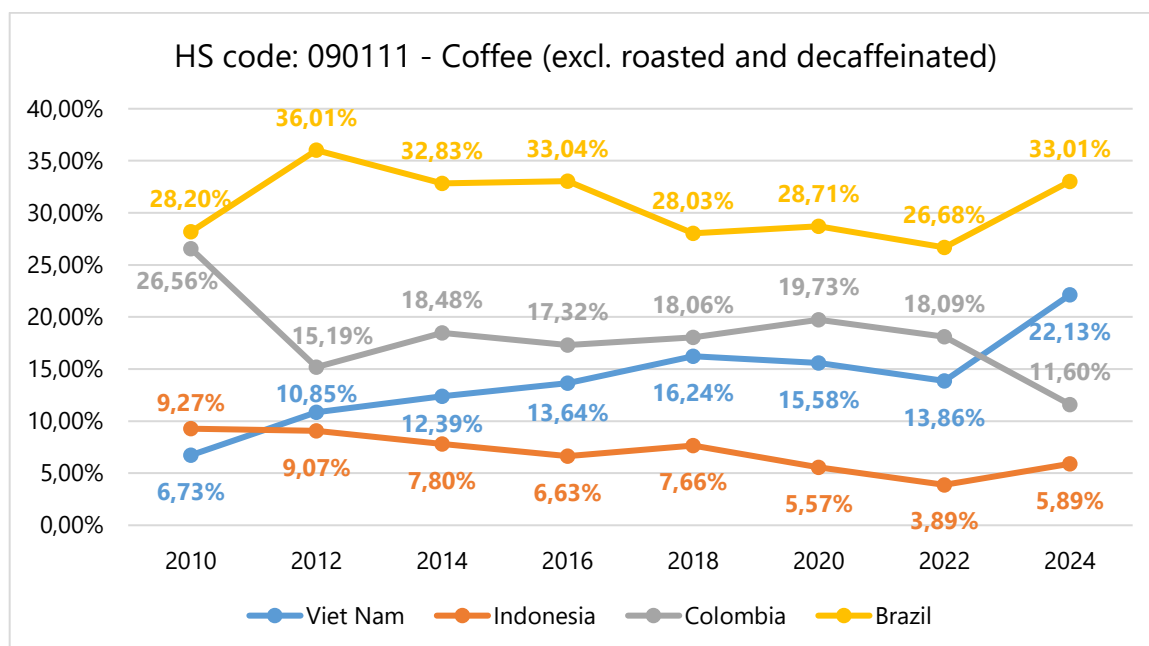


Figure 2. Vietnam, Indonesia, Colombia, and Brazil's coffee export market share in Japan (HS code 090111) from 2010 to 2024

Source: ITC calculations based on Japanese Ministry of Finance statistics

Vietnam's market share in Japan's HS code 090111 coffee sector (excluding roasted and decaffeinated) has shown a remarkable upward trajectory, rising from 6.73% in 2010 to 22.13% in 2024. This surge has allowed Vietnam to surpass both Indonesia and Colombia, firmly establishing itself as the leading Robusta supplier to Japan.

Brazil remained dominant, peaking at 36.01% in 2012 due to large-scale production and strong trade ties (International Coffee Organization, 2012). Colombia's share fell from 26.56% to 11.60% due to climate-related production issues (VietnamBiz, 2018). Indonesia also declined from 9.27% to 5.89%, allowing Vietnam to strengthen its position as the leading Robusta supplier. By 2024, Vietnam had secured its position as Japan's second-largest coffee supplier (with coffee market share at 22.13%), significantly closing the gap with Brazil. However, to challenge Brazil's dominance, Vietnam must further enhance coffee quality, diversify its product range, and strengthen branding efforts to align with Japan's preference for premium coffee. This strong upward trend underscores Vietnam's growing influence in Japan's coffee market, signaling a shift in the competitive landscape.

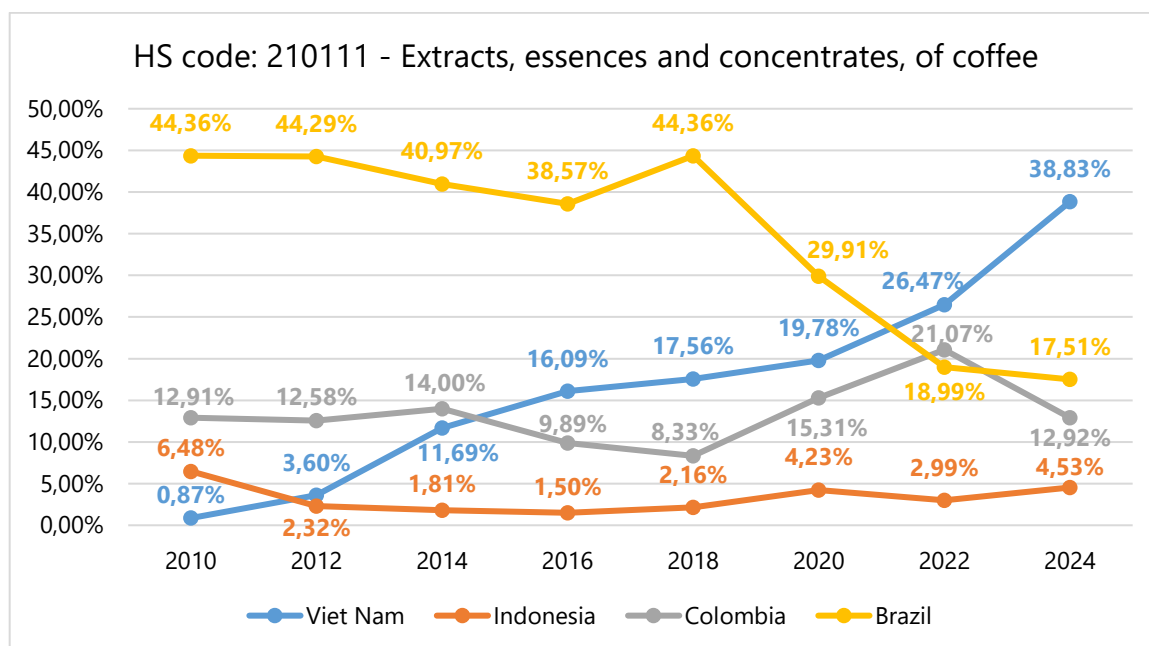


Figure 3. Vietnam, Indonesia, Colombia, and Brazil's coffee export market share in Japan (HS code 210111) from 2010 to 2024

Source: ITC calculations based on Japanese Ministry of Finance statistics

Vietnam's coffee extract exports (HS code 210111) to Japan have experienced a remarkable rise, growing from just 0.87% market share in 2010 to a dominant 38.83% in 2024. This shift has completely restructured the competitive landscape, as Vietnam surpassed Brazil, Colombia, and Indonesia. In 2010, Brazil led the market (44.36%) thanks to its advanced processing and trade networks, while Colombia (12.91%) and Indonesia (6.48%) held steady positions. Vietnam, with minimal presence, lacked competitive strength at the time.

From 2011 to 2024, Vietnam's market share surged, peaking at 19.78% in 2020 and surpassing all competitors by 2024 (38.83%). Meanwhile, Brazil's market share decreased to 17.51%, Colombia stagnated at 12.92%, and Indonesia declined to 4.53%. Vietnam's rapid growth was driven by VJEPA tariff reductions, investment in processing, and increased global demand for Robusta-based coffee extracts (USITC, 2023). This trend marks Vietnam's rise as Japan's top coffee extract supplier, setting a new industry benchmark.

5.2.3. Assessment of the export situation after VJEPA

The implementation of VJEPA significantly shaped Vietnam's coffee exports to Japan, fostering long-term growth despite fluctuations. Initially, challenges in market adaptation slowed progress, but tariff reductions quickly enhanced Vietnam's price competitiveness, leading to strong export expansion in the following years, with market share rising from 6.73% in 2010 to 22.13% in 2024 (HS code 090111) and from 0.87% in 2010 to 38.83% in 2024 (HS code 210111)

While Vietnam faced setbacks during periods of global oversupply and price declines, improvements in processing and branding helped drive a steady recovery. By 2024, exports

surged significantly, supported by rising global coffee prices and continued trade advantages under VJEPA.

For HS code 090111 (excluding roasted and decaffeinated), Vietnam's market share in Japan more than tripled after VJEPA, surpassing key competitors like Indonesia and Colombia, to become the second-largest supplier. Simultaneously, Vietnam ascended to a leading position for HS code 210111 (coffee extracts, essences, and concentrates). However, challenges remain, particularly in competing with Brazil's stronghold in the premium coffee segment. To further strengthen its position, Vietnam needs to focus on quality enhancement, product diversification, and branding improvements to meet Japan's evolving consumer preferences.

6. Discussion

6.1. Achievements

6.1.1. Rising export value and economic impact on Vietnam

According to Japanese Ministry of Finance (2024), since the implementation of VJEPA, the value of Vietnam's coffee exports (HS code 090111) to Japan have increased from 125,050 thousand USD in 2008 to 352,432 thousand USD in 2024 (TradeMap, 2025), reflecting a significant rise in both value and volume. The reduction in tariffs has made Vietnamese coffee more competitive, leading to higher demand and expanded market share.

Notably, prior to VJEPA, Vietnam had no recorded exports under HS code 210111 (coffee extracts, essences, and concentrates), but since then, this segment has experienced remarkable growth. As beginning capitalizing on VJEPA's tariff reduction, Vietnam's exports in this category surged by 1583.87%, reflecting the country's increasing investment in processed coffee and its ability to capitalize on tariff advantages.

This growth directly benefits Vietnamese farmers by ensuring higher incomes and more stable demand, encouraging investments in better cultivation techniques. Increased exports also generate more employment opportunities across the supply chain, from farming and processing to logistics and export services. At a national level, the expansion of coffee exports contributes to Vietnam's economic growth, rural development, and agricultural modernization, reinforcing the country's position as a major global coffee producer.

6.1.2. Improved market position

Vietnam has strengthened its position in Japan's coffee market, with HS Code 090111 (green coffee, excluding roasted and decaffeinated) accounting for over 99% of Vietnam's total exports under HS Code 0901 (Table 1). As Japan primarily imports raw coffee for local roasting and blending, this segment has played a crucial role in enhancing Vietnam's market position. Under VJEPA, Vietnam's market share in this category rose from 6.73% in 2010 to 22.13% in 2024, surpassing Indonesia and Colombia to secure second place after Brazil (Figure 2).

Beyond raw coffee, VJEPA has also expanded the market into HS Code 210111 (coffee extracts, essences, and concentrates). Previously holding just 0.87% market share in 2010,

Vietnam surged to 19.78% in 2020 and became the market leader in 2024 (38.83%), surpassing Brazil, Colombia, and Indonesia (Figure 3). Vietnam has, overall, steadily grown in both export value and volume, helping them secure its place as a trusted supplier in the Japanese coffee market.

Vietnam's expansion across both HS 090111 and HS 210111 reflects its growing role in Japan's coffee market. While green coffee remains dominant, success in processed coffee has diversified Vietnam's exports and strengthened its position as a key supplier, creating opportunities to expand Vietnamese coffee's presence globally.

6.1.3. Enhancing Coffee Quality and Standards

Japan has long maintained strict import regulations, including SPS measures, JIS, and JAS certifications, making market entry challenging for Vietnamese coffee exporters. However, with VJEPA reducing tariffs, the incentive to export to Japan has increased significantly. To take advantage of these benefits, both farmers and exporters have made continuous efforts to improve not only coffee quality but also packaging, administrative procedures, and certification processes. This has led to advancements in farming techniques, post-harvest processing, and compliance with international standards. Over time, these efforts have not only enabled smoother market access but also enhanced the overall quality and reputation of Vietnamese coffee in Japan.

Beyond the Japanese market, this transformation has positioned Vietnam as a more competitive player in the global coffee industry, demonstrating its ability to meet high international standards and paving the way for greater export diversification in the future.

6.2. Limitations

Although the VJEPA was designed to enhance trade between the two nations, there are still certain limitations preventing Vietnam from capitalizing fully on the agreement for coffee exports to Japan. These limitations relate to tariff reductions, non-tariff barriers, rules of origin requirements, and the lack of strategic support for Vietnamese exporters.

6.2.1. Limited tariff reductions and competitive disadvantages

While VJEPA and other FTAs with Japan (e.g., RCEP, CPTPP, AJCEP) facilitate Vietnamese coffee exports, the advantages are less significant than those gained by other major coffee-exporting countries through their FTAs with the Japanese government.

Vietnam faces strong competition from Brazil, Colombia, and Indonesia, which have secured similar or even more favorable conditions through agreements like the Japan-ASEAN Comprehensive Economic Partnership Agreement (AJCEP) or bilateral FTAs. Under the Trade in Goods, Japan must remove tariffs on 92% of goods within ten years. At the same time, Indonesia, as part of the ASEAN-6 group, must remove 90%. Vietnam also removes 90% but with extra conditions based on trade value (AJCEP, 2008). This may put Vietnamese businesses at a disadvantage, as they face additional conditions that could make them less competitive than those from other ASEAN countries.

Meanwhile, Japan's premium coffee market is predominantly led by domestic brands that have cultivated strong brand recognition and tailored products to local tastes. UCC Ueshima Coffee Co., for instance, contributes substantially to the market with tens of millions of cases sold annually (Astute Analytica, 2024). As a result, despite VJEPA's tariff cuts, Vietnam's coffee industry remains disadvantaged in pricing and market positioning, limiting its ability to fully benefit from the agreement.

6.2.2. Persistent Non-Tariff Barriers (NTBs)

Despite VJEPA, Vietnam continues to face stringent non-tariff barriers (NTBs) in Japan, which limit market access and increase export costs. A major challenge is Japan's rigorous Sanitary and Phytosanitary (SPS) standards, particularly its strict Maximum Residue Levels for pesticides. Failure to comply results in shipment rejections or costly additional testing. Moreover, Japan enforces strict controls on mycotoxin and heavy metal contamination, particularly Ochratoxin A (USDA Japan, 2017), posing difficulties for Vietnamese producers who rely on traditional drying methods.

Beyond SPS regulations, Vietnamese exporters encounter complex import procedures and certification requirements. Compliance with Japan Agricultural Standards (JAS) is necessary but costly, creating financial barriers for smaller exporters. Additionally, Japanese authorities require laboratory testing for moisture content, acidity levels, and foreign matter, increasing costs and prolonging customs clearance, thereby reducing the competitiveness of Vietnamese coffee.

6.2.3. Restrictive Rules of Origin (ROO) and bureaucratic compliance issues

Although VJEPA offers tariff benefits, Vietnamese coffee exporters must meet strict rules of origin (ROO) to qualify. The agreement requires that at least 40% of a product's value originate from Vietnam (Ministry of Industry and Trade, 2009). This poses significant challenges, especially for small and medium-sized producers with limited resources to source materials domestically.

Additionally, obtaining a Certificate of Origin (C/O Form VJ) from Vietnam's Ministry of Industry and Trade is a complex process. The application involves extensive documentation, including declarations of origin for materials used and detailed descriptions of the manufacturing process (Andersen Vietnam, 2024). The process demands extensive paperwork and strict verification, creating difficulties for smaller exporters without dedicated compliance teams. As a result, administrative costs rise, and many businesses opt out of using VJEPA's benefits. Meanwhile, ASEAN exporters under AJCEP face simpler verification procedures, giving them a competitive edge. Without reforms to streamline ROO compliance, Vietnam's ability to maximize VJEPA remains constrained.

6.3. Expected trends in the future

Looking forward, several key trends are expected to shape the future landscape of Japan's coffee market. These important trends are likely to influence Vietnam's coffee exports to Japan, shaping both opportunities and challenges for the industry.

6.3.1. Increasing emphasis on sustainability and quality standards

Japan's coffee market is shifting towards sustainability and certified high-quality products, driven by growing consumer awareness of ethical sourcing and environmental impact (Ministry of Industry and Trade, 2024a). With the Ministry of Agriculture and Environment's initiatives to align Vietnam's coffee production with international sustainability certifications (e.g., Rainforest Alliance, UTZ, and Organic), demand for certified Vietnamese coffee is expected to rise. Mutual Recognition Agreements (MRAs) with Japan on Sanitary and Phytosanitary (SPS) standards will further facilitate smoother trade by reducing redundant testing and inspection costs for Vietnamese exporters.

6.3.2. Rising demand for processed and value-added coffee

The expansion into Japan's ready-to-drink (RTD) coffee market, projected to reach \$22.81 billion USD by 2032, presents a major opportunity for Vietnamese coffee exporters (Astute Analytica, 2024). As environmental concerns grow, the demand for sustainable and ethically sourced coffee is becoming a major topic in Japan (Ministry of Industry and Trade, 2024a). Vietnamese firms are expected to diversify beyond raw coffee bean exports by developing premium RTD, instant, and roasted coffee products tailored to Japanese tastes.

In particular, Vietnamese processed coffee exports (HS code 210111) have experienced remarkable growth in value, driven by the implementation of Free Trade Agreements (FTAs) such as the VJEPA, as discussed in Sections 4.1 and 4.2. This implies the expansion of global coffee consumption trends, including the rising preference for instant and specialty coffee products (Business Research Insights, 2025). Given these factors, it is expected that this segment will continue to grow, with Vietnamese exporters leveraging tariff advantages, improving product quality, and expanding their market reach.

6.3.3. Growth of e-commerce and digital marketing channels

The growth of e-commerce and mobile ordering platforms is making it more convenient for Japanese consumers to purchase coffee from home or the workplace (Ministry of Industry and Trade, 2024a). By leveraging online platforms, Vietnamese exporters can expand their direct-to-consumer sales, reaching a broader audience and reducing reliance on traditional distribution channels. Implementing digital marketing strategies, such as collaborations with influencers and localized advertising campaigns, can enhance brand recognition and foster trust among Japanese consumers. These approaches align with global trends where companies like Nestlé have successfully utilized AI-driven marketing strategies to tailor their offerings to local markets (ABITA LLC&MARKETING JAPAN, 2024).

7. Recommendations

The above analysis of the current situation, achievements, limitations, and expected trends of Vietnam's coffee exports to the Japanese market under the implementation of the VJEPA agreement highlights the significant potential this agreement offers. Based on this, the

research team proposes several solutions to enhance opportunities and mitigate challenges for Vietnam's coffee exports to Japan.

7.1. To the Government

7.1.1. Recommendations for the Ministry of Industry and Trade (MOIT)

Enhancing tariff negotiations and Free Trade Agreements

To overcome Vietnam's tariff disadvantage under VJEPA, the MOIT should advocate for improved tariff reductions in future trade negotiations with Japan. Compared to other Free Trade Agreements (FTAs) Japan has signed with major coffee-exporting nations such as Brazil, Colombia, and Indonesia, Vietnam's tariff advantages under VJEPA remain limited (Ministry of Agriculture and Rural Development, 2022a). Strengthening bilateral negotiations to ensure more favorable tariff conditions, particularly for processed coffee products, will enhance Vietnam's competitiveness in the Japanese market.

To achieve this, MOIT should conduct a comparative analysis of tariff structures across different FTAs Japan has with other coffee-exporting countries. This will help identify specific areas where Vietnam lags behind and provide a basis for more targeted negotiations.

Simplifying Rules of Origin compliance by digitalizing the process

To resolve the problem of complex certification procedures and strict rules of origin (ROO), the MOIT should collaborate with customs authorities to fully digitalize the Certificate of Origin (C/O Form VJ), thereby simplifying the documentation process and expediting coffee shipment clearance (WTO Center, 2025). While businesses can apply for a C/O online through the eCoSys system, they may still need to collect the physical certificate from the issuing authority (e.g., VCCI or MOIT) (VietnamTradePortal, 2016).

In addition, automated verification and blockchain-based traceability systems have been successfully implemented in countries like Thailand and Malaysia, significantly reducing processing times and improving transparency (UNESCAP, 2024). These technologies allow real-time tracking of supply chain data, ensuring compliance with ROO requirements while minimizing fraud and human error. By adopting similar solutions, Vietnam can streamline its certification process, lower compliance costs for exporters, and improve its ability to fully leverage VJEPA's tariff benefits.

7.1.2. Recommendations for the Ministry of Agriculture and Environment (MOAE)

Enhancing compliance with Sanitary and Phytosanitary (SPS) Standards

Japan enforces strict pesticide residue limits, mycotoxin content regulations, and food safety standards, which present significant non-tariff barriers (Japan Ministry of Agriculture, 2024). To deal with Japan's strict Sanitary and Phytosanitary (SPS) regulations, the Vietnamese government should strengthen monitoring and testing infrastructure to ensure compliance with food safety standards. Investing in modern laboratory facilities equipped to detect pesticide residues, heavy metals, and other contaminants at the required levels is essential for meeting Japanese import regulations.

Besides, establishing regional testing centers will provide exporters with easier access to pre-export inspections, helping them verify compliance before shipment and reducing the risk of rejection at Japanese ports. Additionally, training programs should be implemented to help small and medium-sized enterprises (SMEs) adopt advanced post-harvest processing and food safety protocols, ensuring compliance with Japanese import requirements.

Promoting sustainable and high-quality coffee production

Japan's market favors certified coffee, with organic products fetching up to 35% higher prices (Lan Do, 2024). To align with Japan's increasing demand for sustainably sourced coffee, the authorities should support farmers in obtaining international certifications such as Rainforest Alliance, UTZ, and Organic. These certifications enhance credibility, improve market access, and allow exporters to tap into premium pricing segments (International Coffee Organization, 2025).

The Ministry should take a proactive role in promoting sustainability within the agricultural sector by providing comprehensive training programs on sustainable farming practices. These programs should include workshops, on-site demonstrations, and expert consultations to ensure that farmers have the necessary knowledge and skills to implement environmentally friendly techniques effectively.

In addition to education and certification support, the Ministry should offer financial incentives to ease the transition to sustainable agriculture. These could include subsidies for eco-friendly farming equipment, grants for adopting new technologies, and low-interest loans that allow farmers to invest in long-term sustainability measures without facing significant financial strain.

7.2. Recommendations for Business Associations and Coffee Exporters

7.2.1. Developing strategic partnerships with Japanese buyers

To solve the lack of strong, long-term ties between Vietnam's coffee industry and Japanese distributors, Vietnam should adopt a strategic and proactive approach to market expansion. One of the most effective ways to bridge this gap is by actively participating in trade fairs, business matchmaking programs, and networking events that focus on fostering international trade partnerships. These platforms provide Vietnamese coffee exporters with invaluable opportunities to showcase their products, highlight their unique value propositions, and engage directly with key stakeholders in the Japanese market, including distributors, retailers, and potential business partners.

Events such as Coffee Expo Vietnam 2025 play a crucial role in this process by serving as a gateway for Vietnamese coffee businesses to gain visibility, establish credibility, and foster direct connections with Japanese buyers. Through face-to-face interactions, product demonstrations, and business negotiations, Vietnamese exporters can better understand Japanese consumer preferences, adapt their offerings accordingly, and position themselves competitively in the market. Moreover, these events facilitate trust-building between

Vietnamese suppliers and Japanese distributors, which is essential for securing long-term and stable trade relationships (Japan External Trade Organization, 2025).

7.2.2. Moving up the value chain with processed coffee

Vietnam's coffee export strategy has traditionally focused on raw coffee beans, with approximately 25.4 million 60-kilogram bags exported in the 2022/23 marketing year. In contrast, exports of roasted and ground coffee were about 0.45 million bags, and soluble coffee nearly 1.9 million bags during the same period (Nguyen, 2024a).

In order not to overlook the higher-value processed coffee market in Japan, Vietnamese businesses should invest in value-added processes such as roasting, instant coffee production, and premium specialty coffee branding. This approach aligns with Japan's growing demand for high-quality, ready-to-drink (RTD) coffee products. According to Astute Analytica (2024), The Japanese RTD coffee market was valued at approximately US\$10.58 billion in 2023 and is projected to reach US\$22.81 billion by 2032, growing at a compound annual growth rate (CAGR) of 8.91% during the forecast period. Japanese consumers increasingly prefer convenient, premium beverages with unique flavors and health-conscious options (MarkWideResearch, 2025). By developing high-quality, ready-to-drink coffee products tailored to these preferences, Vietnamese exporters can tap into this lucrative market segment.

7.2.3. Leveraging e-commerce and digital marketing to expand market reach

Japanese consumers are increasingly turning to e-commerce platforms and specialty coffee subscription services for their coffee purchases. The Japanese coffee e-commerce market is projected to reach approximately USD 682.6 million by 2024, accounting for 58.9% of the country's hot drinks e-commerce sector (ECDB, 2025). To solve the problem of low online reach, Vietnamese exporters should invest in digital trade platforms and target Japanese consumers through localized online marketing campaigns. Establishing a strong online presence on platforms like Rakuten, Amazon Japan, and Yahoo! Japan Shopping could significantly boost direct-to-consumer sales.

Additionally, leveraging social media marketing, search engine optimization (SEO), and influencer collaborations can help build brand awareness and trust among Japanese consumers. Partnering with local distributors and utilizing targeted advertising strategies, such as pay-per-click (PPC) campaigns and promotional discounts, can further drive sales.

Investing in multilingual customer service and optimizing product listings with high-quality images, detailed descriptions, and customer reviews will also improve engagement and conversion rates. By embracing a comprehensive digital strategy, Vietnamese coffee exporters can strengthen their foothold in Japan's competitive e-commerce landscape, ensuring long-term growth and sustainability in the market.

8. Conclusion

The Vietnam-Japan Economic Partnership Agreement (VJEPA) has created opportunities for Vietnam's coffee industry by reducing tariffs and improving market access. These tariff cuts

have strengthened Vietnam's competitive position, boosting export value and market presence in Japan. However, while tariff reductions provide short-term advantages, the long-term sustainability of Vietnam's coffee exports relies on the industry's ability to comply with Japan's stringent non-tariff measures.

A key challenge lies in overcoming Japan's competition from other coffee-exporting nations, strict non-tariff barriers, and bureaucratic compliance issues related to rules of origin. These regulatory barriers require Vietnamese exporters to comply with Japan's rigorous food safety and quality standards. Without full adherence, the benefits of VJEPA's tariff reductions could be undermined, limiting Vietnam's market expansion.

To fully leverage the opportunities presented by VJEPA, Vietnam's coffee industry must improve product quality, processing techniques, and alignment with Japan's demand for high-value coffee. Investing in certifications, enhancing quality control, and increasing specialty coffee production are crucial. Stronger collaboration between the government, industry associations, and exporters is needed to ensure compliance, simplify export processes, and boost competitiveness. By addressing these challenges through innovation, improved quality standards, and compliance with Japan's trade policies, Vietnam can ensure sustainable growth and strengthen its position as a key coffee supplier in the Japanese market.

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