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**Date:** 1/23/2015

**GAIN Report Number:** VM5006

## **Vietnam**

### **Food Processing Ingredients**

#### **2015 Annual Report**

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**Report Highlights:**

The Vietnamese food processing sector continues to expand supported by rebounding economic growth and macroeconomic stability, Vietnam's deepening international economic integration, and a rapidly urbanizing, youthful population which are shifting their diets to include more processed and package food products. As foreign invested food processors continue to establish themselves in the Vietnam market, the prospects for U.S. food ingredient exporters will continue to improve, but the overall market will remain very competitive, with preference continuing to be given to regional ingredient exporters, such as South Korea, Thailand, and Malaysia.

## SECTION I – MARKET SUMMARY

Vietnam’s food processing and beverage industry continued to grow in 2014, expanding 5.1 percent in the food processing sector, versus a 6 percent growth rate in 2013; and 10 percent in the beverage sector, from 8.8 percent in 2013, according to data provided by Vietnam’s General Statistics Office (GSO) (at 2010 prices). At current prices, Vietnam’s food and beverage industry is growing fast at almost 21 percent in 2013, with food production growing at 20 percent, and beverage production growing by almost 27 percent (See Table 1).

**Table 1: Gross output of food and beverage manufacturing industries (at current prices)**

*Unit: Billion Vietnam Dong (VND)*

Year	2009	2010	2011	2012	2013 est.	Change (%) 2013 over 2012
<b>Gross output of food and beverage industries in Vietnam</b>	<b>466,166</b>	<b>582,720</b>	<b>717,963</b>	<b>869,433</b>	<b>1,050,868</b>	<b>20.9 %</b>
<i>Gross output of food manufacturing</i>	<i>418,481</i>	<i>529,622</i>	<i>660,492</i>	<i>786,298</i>	<i>945,374</i>	20%
<i>Gross output of beverage manufacturing</i>	<i>47,685</i>	<i>53,098</i>	<i>57,471</i>	<i>83,135</i>	<i>105,494</i>	26.9%

*Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)*

According to the latest statistics from the GSO, the number of food processors in Vietnam in 2012 was 7,751, of which 5,708 were registered food processing enterprises and 2,043 were enterprises manufacturing beverages. In 2012, the number of food and beverage processors in Vietnam grew 3.8 percent year-on-year (see Table 2). Some firms specialize in producing only food ingredients, while others handle retail-ready products, in addition, to ingredients.

**Table 2: Number of enterprises manufacturing food and beverage products**

Year	2008	2009	2010	2011	2012	2013
<b>Total enterprises manufacturing food and beverage products</b>	<b>6,195</b>	<b>6,686</b>	<b>6,688</b>	<b>7,466</b>	<b>7,751</b>	<i>n/a</i>
<i>Number of enterprises manufacturing food products</i>	<i>4,719</i>	<i>5,005</i>	<i>4,977</i>	<i>5,498</i>	<i>5,708</i>	<i>n/a</i>
<i>Number of enterprises manufacturing beverages</i>	<i>1,476</i>	<i>1,681</i>	<i>1,711</i>	<i>1,968</i>	<i>2,043</i>	<i>n/a</i>

*Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)*

Table 3 shows some main industrial food products and main food ingredients on volume terms. Table 4 shows the value of some imported food products and agricultural-based food ingredients, which are used for food and beverage manufacturing.

**Table 3: Vietnam's production of main industrial food products and food ingredients**

	2010	2011	2012	2013	2014 est.
<b>Main Industrial Food Products</b>					
Sea salt (thousand tons)	975.3	862	776.4	716.6	n/a
Canned meat (tons)	4,677	5,209.2	5,520.0	4,908.2	n/a
Canned aquatic products (thousand tons)	76.9	86.2	96.6	107.9	n/a
Frozen aquatic products (thousand tons)	1,278.3	1,362.9	1,372.1	1,468.2	n/a
Fish sauce (million liters)	257.1	280.2	306.0	324.4	n/a
Canned vegetables (thousand tons)	48.4	55.7	60.4	62.2	n/a
Canned fruits and nuts (thousand tons)	60.1	53.6	50.0	52.1	n/a
Refined vegetable oil (thousand tons)	565.9	568.7	631.6	690.3	n/a
Fresh milk (million liters)	520.6	645.3	701.3	759.6	947.2
Powdered milk (thousand tons)	58.9	76.1	81.2	86.1	81.4
Milled rice (thousand tons)	33,473	38,289	39,748	40,940	
Refined sugar (thousand tons)	1,141.5	1,306.8	1,634.3	1,576.3	1,585.5
Roast, ground, and instant coffee (thousand tons)	68.1	80.5	92.0	90.4	n/a
Processed tea (thousand tons)	211	207.4	193.3	187.1	n/a
Sodium Glutamate (thousand tons)	248.2	257.8	255.8	248.7	249.1
Liquor (million liters)	349.4	337.1	330.9	314.3	n/a
Beer (million liters)	2,420.2	2,625.7	2,978.7	2,902	3,140
Mineral water (million liters)	458.5	528	566.4	623	n/a
Pure water (million liters)	1,342.9	1,572.2	1,694.7	1811.6	n/a
<b>Main Food Ingredients</b>					
Rice (thousand tons)	40,005.6	42,398.5	43,737.8	44,076.1	44,994.3
Corn (thousand tons)	4,625.7	4,835.6	4,973.6	5,193.4	5,191.7
Sugar-cane (thousand tons)	16,161.7	17,539.6	19,015.4	20,128.5	19,927.5
Cassava (thousand tons)	8,595.6	9,897.9	9,735.4	9,742.5	10,225.3
Peanuts (thousand tons)	487.2	468.7	468.5	491.9	454.5
Soybeans (thousand tons)	298.6	266.9	173.5	168.2	157.9
<b>Perennial industrial crop products</b>					
Cashew nuts (thousand tons)	310.5	309.1	312.5	275.5	344.9
Green coffee beans (thousand tons)	1,100.5	1,276.6	1,260.4	1,381.1	1,395.6
Tea (fresh) (thousand tons)	834.6	878.9	909.8	936.3	962.5
Pepper (thousand tons)	105.4	112	116	130.4	147.4
<b>Fruit crop products</b>					
Grapes (thousand tons)	16.7	14.7	16.3	17.4	n/a
Mango (thousand tons)	580.3	687	665	678.4	n/a

Orange, mandarin	728.6	702.7	704.1	708.6	n/a
Longan	573.7	595.7	542.5	552	n/a
Litchi, Rambutan	522.3	725.4	648.5	641.1	n/a
<b>Livestock products</b>					
Buffalo (thousand tons/live weight)	83.6	87.8	88.5	85.4	n/a
Beef (thousand tons/live weight)	278.9	287.2	293.9	285.4	n/a
Pork (thousand tons/live weight)	3,036.4	3,098.9	3,160	3,217.9	n/a
Chicken (thousand tons/live weight)	615.2	696	729.4	746.9	n/a
Fresh milk (million liters)	306.7	345.4	381.7	456.4	n/a
Eggs (million pieces)	6,421.9	6,896.9	7,299.9	7,754.6	n/a
Honey (tons)	11,944.4	11,803.9	12,364.7	12,882.6	n/a
<b>Fishery products</b>					
Total (thousand tons), of which	5,142.7	5,447.4	5,820.7	6,019.7	6,332.5
<i>Catch fishery production</i>	2,414.4	2,514.3	2,705.4	2,803.8	2,919.2
<i>Aquaculture fishery production</i>	2,728.3	2,933.1	3,115.3	3,215.9	3,413.3

Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)

**Table 4: Value of some imported food products and ingredients**

Unit: \$ Million

	2009	2010	2011	2012	2013	2014
<b>Raw and primary products, of which</b>	<b>16,340.8</b>	<b>19,962.6</b>	<b>27,620.0</b>	<b>26,898.8</b>	n/a	n/a
<i>Foodstuff and live animals</i>	4,631.2	6,225.1	7,379.8	7,669.1	n/a	n/a
<i>Dairy products</i>	515.8	708.3	859.1	1,016	1,099	1,098
<i>Beverage and tobacco</i>	341.6	292.9	318.5	321.1	n/a	n/a
<i>Vegetable oils, fat</i>	492.5	698.1	955.8	747.7	692.2	767
<i>Wheat flour</i>	8.2	12.8	10.9	10.7	n/a	n/a
<i>Wheat</i>	345.7	569.7	814.2	769.9	614	623
<i>Wheat flour</i>	8.2	12.8	10.9	10.7	n/a	n/a
<i>Vegetables and fruits</i>	285	294	294	335	404	520
<i>Animal feed and feed ingredients</i>	1,723	2,160	2,330	2,421	3,036	n/a
<i>Sea food products</i>	280	334	554	647	698	1,063

Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)

Food consumption in Vietnam is growing slowly as the majority of consumers are still recovering from the economic slowdown of 2009-2012. In 2013, food consumption rose 7.2 percent and beverage consumption increased by 13.7 percent, according to statistics from GSO. However, the growing and modernizing, retail system and changing consumption habits show a promising trend for the retail food industry, which will spur food and beverage processing in the future. Vietnam's total retail sales of goods and services at current prices rose 12.5 percent in 2014 over the previous year (See Table 5).

**Table 5: Food Sector sales of goods and services by kind of economic activity**

Unit: VND billion (at current prices)

Year	Retail sales	Accommodation, food and beverage service	Tourism and tourism-related services*	Total
2010	1,254,200	212,065.2	211,079.5	<b>1,677,344.7</b>
2011	1,535,600	260,325.9	283,597.6	<b>2,079,523.5</b>
2012	1,740,360	305,651.0	323,119.9	<b>2,369,130.6</b>
2013	2,009,179	315,831.8	292,951.8	<b>2,617,962.6</b>
2014	2,216,211	352,815.9	376,226.7	<b>2,945,253.9</b>

Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)

Note: \* column includes many industries unrelated to food and agriculture.

To take advantage of the modernizing retail sector and changing consumer preferences, Vietnam’s food and beverage industry is becoming more developed and westernized. Although organized modern retail continues to grow, traditional wet markets are still present and dominate in both rural and urban settings in Vietnam. Please refer to GAIN report [VM3062 for additional information on Vietnam’s Food Retail Sector](#).

**Table 6: Number of traditional “wet” markets, supermarkets and commercial centers**

Year	Number of traditional “wet” markets	Number of supermarkets	Number of commercial centers
2010	8,528	571	101
2011	8,550	638	116
2012	8,547	659	115
2013	8,546	724	132

Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)

Key market drivers for the food processing industry include strong economic growth, which has averaged around five percent annually with relatively low inflation, ongoing reforms, rapid urbanization, and rising disposable incomes. 2014 macroeconomic data indicates Gross Domestic Product (GDP) growth was 5.98 percent, up from 5.42 percent in 2013, and 5.25 percent in 2012. The continued strong inflow of overseas remittances from Vietnamese living overseas also buttresses many families’ incomes. Foreign direct investment (FDI) has been relatively stable in recent years (\$15.6 billion in 2014, \$21.6 billion in 2013, \$16.3 billion in 2012, and \$15.6 billion in 2011, respectively), and provides higher paying and skilled jobs to larger segments of the Vietnamese population, especially in the outskirts of cities and rural areas. All these factors have created a dynamic commercial environment in Vietnam.

Additionally, the following factors are influencing consumption trends and the type and quality of inputs being used in processed foods:

- (1) A population of over 90.7 million people, of which half are under the age of thirty. A growing number of young people have adopted a modern, western-minded life style, especially in urban areas, and are more receptive to convenience and processed foods, leading to increased demand for those products.

- (2) Vietnam joined the World Trade Organization (WTO) in 2007 and tariffs on processed food and ingredients have fallen. As a result, Vietnamese consumers have more opportunities to be exposed to a wider range of imported food and beverage products.
- (3) With rising disposable income levels, and a growing middle class, Vietnamese consumers are changing their food consumption patterns, shifting their diets to more protein, including more meat and dairy products. As a result, healthy, processed and packaged products and the modern retail system are expected to grow.
- (4) Growing popularity of fast food and restaurant chains which favor the use of imported, high quality, food ingredients.

**Table 7. Advantages/Opportunities and Challenges in the Food and Beverage Industry**

<b>Advantages/Opportunities</b>	<b>Challenges</b>
Continued growing economy with curbed inflation, a strong inflow of overseas remittances, and stable FDI	Uncertainty of government regulations negatively impacts local importers of food and food ingredients
Rapid urbanization, busier lifestyles leading towards increased consumption of convenient and processed foods	Registration with Government of Vietnam (GOV) authorities for new food and food ingredient products, especially functional foods, is very costly and burdensome
Vietnam joined the World Trade Organization (WTO) in 2007 and is currently participating in the Trans-Pacific Partnership (TPP) Negotiations, which would lower import tariffs for food and food ingredients	Increased SPS barriers on animal and plant origin products persist
Rising disposable income levels are increasing the demand for convenient foods, packaged food, and higher quality, hygienic safe food and food ingredients	U.S. exporters are often perceived as not flexible or responsive enough to importer's needs
Growing retail network, western-style fast food restaurant chains, bakeries and coffee shops are modernizing food retail	Large number of small food processors only source their ingredients locally
Growth in the food processing and beverage industry	Modern retail sector, although expanding rapidly in urban areas, has not grown as fast in rural areas
Vietnam's continued economic integration and negotiation of free trade agreements is expanding export markets for processed food products	Processed foods still are seen as inferior to fresh foods by many consumers in Vietnam, especially in rural areas
Growing young population is adopting modern lifestyle, eating out more, and shopping in supermarkets and hypermarkets	Strong competition in the Vietnamese market from other countries for food and food ingredient products
Vietnamese consumers are becoming more accepting of imported foods and flavors	Vietnamese consumers are currently not ready to accept significant price differences for high-end products such as organic products

Local food processors are increasing production capacity, food quality and packaging initiatives, and developing marketing strategies to meet growing demand of consumers and export markets	U.S. food and food ingredients are seen as high priced with high quality, but some food processors are not yet willing to pay these high prices
More international food and beverage brands are entering Vietnam and increasing consumer awareness of new products	Significantly higher shipping cost and longer transportation time from U.S. than from Asia and Oceania
Growing demand for more protein in diets and healthier food products	Low tariffs applied to food and food ingredients from ASEAN countries under the ASEAN Free Trade Agreement
In some subsectors, locally produced food ingredients cannot meet the demand of processors, especially in the dairy and soybean processing sectors	Limited infrastructure and distribution for perishable products (such as cold chain)
U.S. food and food ingredients products are considered high quality and safe	Vietnam imposes strict fines for plant and animal health, food safety and trade violations, which negatively impact local importer's businesses

## ***SECTION II – ROAD MAP FOR MARKET ENTRY***

### ***A. ENTRY STRATEGY***

The best way for U.S. new-to-market exporters to enter the food processing market is to develop a strategic plan targeting a few food processors, and then be persistent and consistent with face-to-face meetings and follow-up meetings. It can take up to one or two years to make a successful sale into this market.

For the most part, U.S. exporters entering the Vietnamese market will need to consider two marketing efforts; one for targeting the northern part of the country, which has a higher concentration of government ministries and regulatory agencies, and one for the South, which is the dominant industry hub. The majority of food processors are located in the South.

To enter or expand in Vietnam, U.S. businesses can contact and appoint a local partner for direct import or appoint the partners as an agent to arrange for importing, distributing, and marketing. U.S. companies new to Vietnam should conduct sufficient due diligence on potential local agents/distributors to ensure they possess the requisite permits, facilities, manpower, and capital. The local partner should be familiar with the existing regulations for customs clearances, testing, certifications, labeling, and registration. The partner should also be capable to distribute imported products and responsible for the marketing efforts needed to create or raise awareness for new product among food processors or consumers. An exclusive agreement is also a common tool used by local partners to monopolize distribution of imported food and food ingredient products.

Trade relationships are very important, and regular visits with local partners, as well as, with key food processors should be a priority. Training courses organized and sponsored by exporters about new food ingredient applications for local food processors are also important to increase the utilization of U.S.-

sourced products in processing. Larger food processors usually have a Research and Development (R&D) Division which evaluates new ingredients in product formulation. Post recommends that technicians from R&D Divisions be included in the training for new food ingredient applications. Other small companies receive proposals of new ingredients through their Purchasing Division. Some large local food processors and most small food processors want to buy their raw materials from local suppliers or distributors due to better customer service, timely technical assistance, and also the offering of more financing options.

Firms seeking a direct presence in Vietnam should establish a commercial operation utilizing the following options: (1) a representative office license; (2) a branch license; and (3) a foreign investment project license under Vietnam's revised Foreign Investment Law.

U.S. ingredient processors that already supply major food processors in the United States or other foreign markets may wish to investigate similar supply relationships with firms that have a presence in Vietnam. Key factors to consider when researching the market are whether a product has market access and the landed post-duty cost of a product. U.S. products are considered as high quality with high prices compared with other exporters.

Timely shipment is also a very important factor for business in Vietnam, due to limited warehouse storage. The long distance from the United States to Vietnam, about 30 days for transportation by sea for vessels leaving the West Coast of the U.S., puts U.S. exporters at a disadvantage against suppliers from Asia and Oceania, where shipping time ranges between 7 and 14 days.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, U.S. exporters are recommended to have an irrevocable letter of credit, as the terms of payment for a transaction.

Participation in trade shows may offer good opportunities to understand the market and engage directly with potential importers/distributors or local partners. The bi-annual Food & Hotel Vietnam Show (next show will be in Ho Chi Minh City (HCMC), April 21-23, 2015) and the Food Ingredients Vietnam show organized in HCMC (next show will be May 20-22, 2015) are very good events to target.

FAS encourages potential U.S. exporters to review the Exporter Guide Report ([VM1054](#)) and other GAIN reports outlined in Section V of this report, for existing and potential opportunities and market analysis.

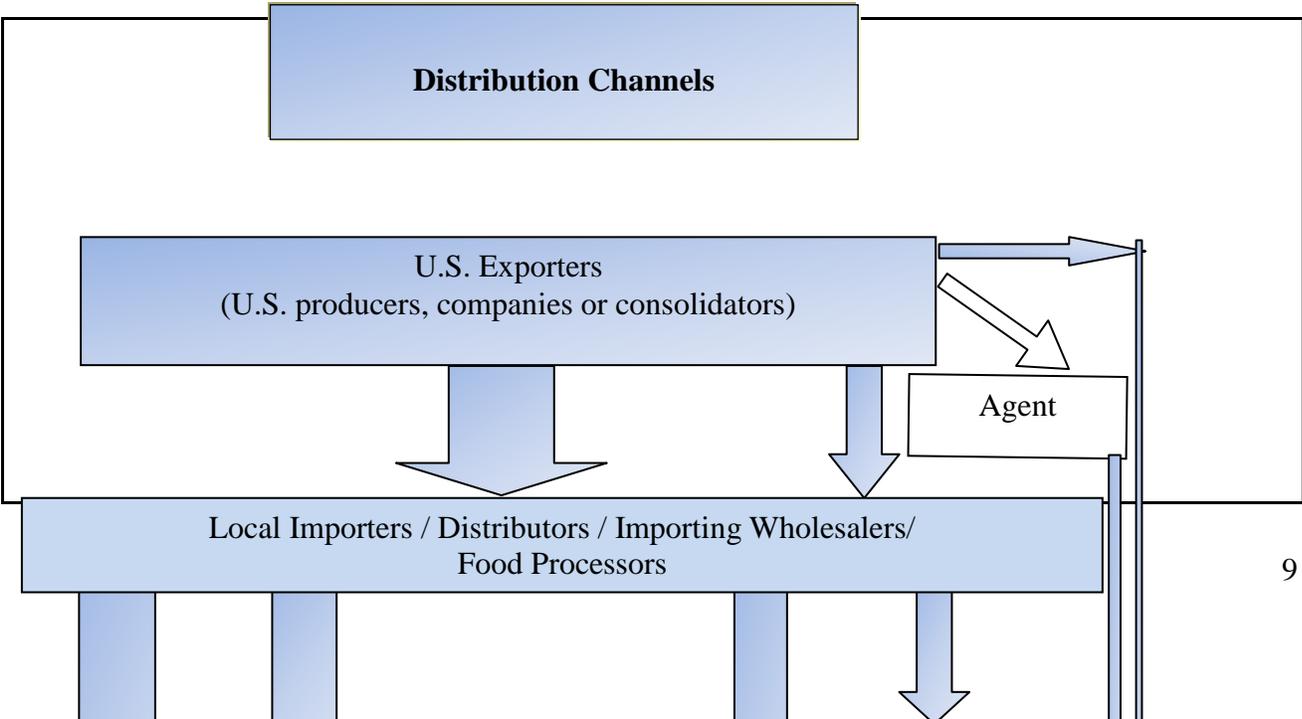
## ***B. MARKET STRUCTURE***

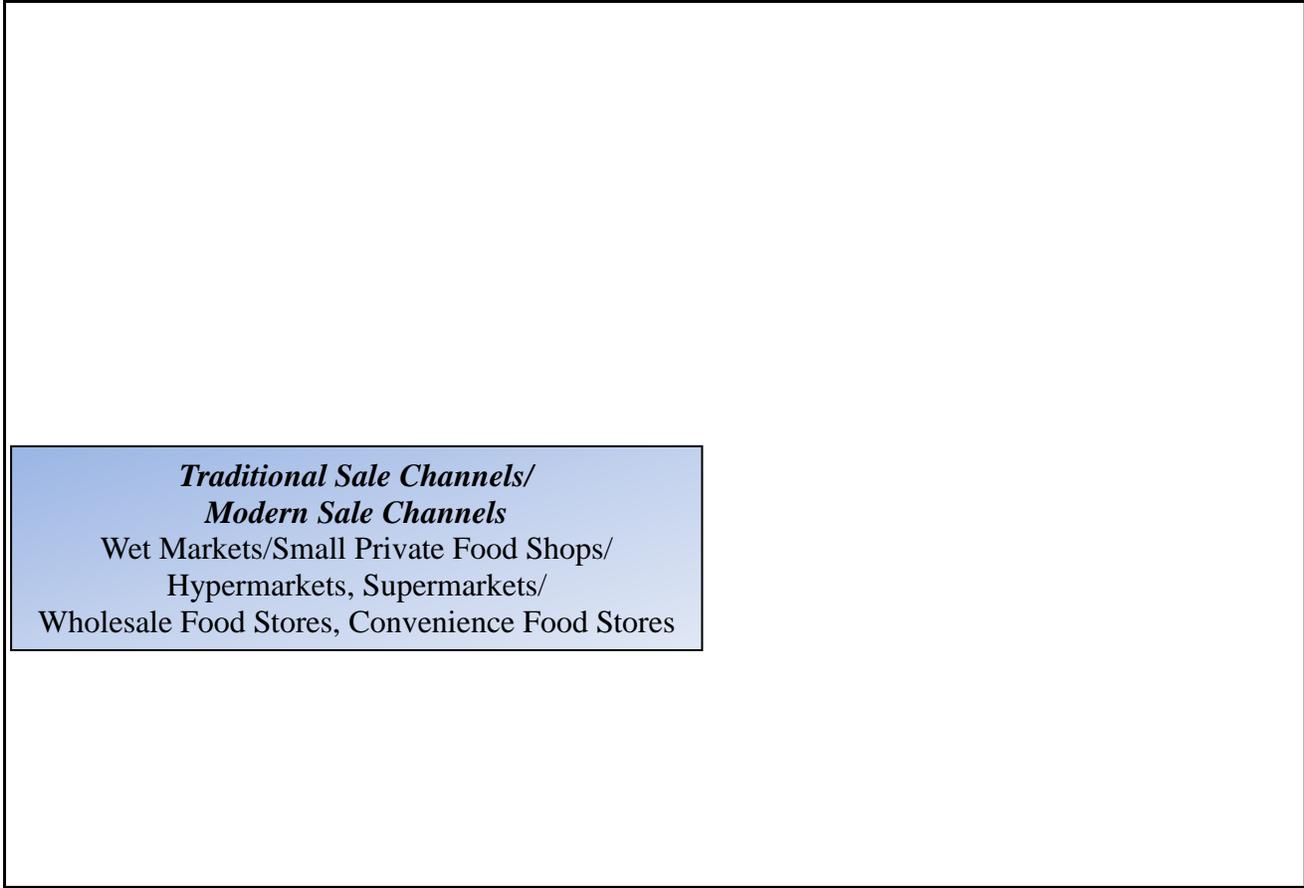
Many food processors in Vietnam use both locally produced raw materials as well as imported food ingredients in their operations. They also have their own distribution channels to wholesalers, distributors and retailers, as well as to hotels, restaurants and other industries nationwide.

In Vietnam, some large food processors prefer to purchase raw materials through local importers or distributors to avoid the complication of import procedures. Most small food processors with low sales volume utilize local wholesalers who can take care of the necessary import procedures.

Chart 1 shows the distribution channels of how products are passed from U.S. exporters to food processors.

**Chart 1: Distribution Channels of imported food and food ingredient products into Vietnam**





U.S. exporters can refer the distribution diagram, which follows one of the basic models:

- 1). Exporters→Food Processors as direct local importers
- 2). Exporters→Local importers/Distributors→Wholesalers→Food Processors
- 3). Exporters→Local importers/Distributors→Food Processors
- 4). Exporters→Local importers→Wholesalers/Distributors→Food processors
- 5). Exporters→Local importers→Wholesalers/Distributors→Traditional sales channel and/or modern sales channel (wholesale food stores, supermarkets, hypermarkets, wet markets, convenience stores, small private food shops)→small food processors/household food processors
- 6). Exporters→Agent→ Food Processors

Model Numbers 1, 3, and 6 are the most common practice in Vietnam. Most food importers are also distributors in Vietnam. Vietnam’s limited distribution infrastructure and facilities for perishable food ingredients, such as cold chains, is also a significant constraint to importing certain food ingredients. Improper handling of food and food ingredients in the supply chain is also a constraint to the marketing potential of imported food and food ingredients.

**C. COMPANY PROFILES**

Depending on the scale of the operation, Vietnam’s food processing sector can be divided into the following categories:

- Large domestic companies (either private, joint stock, or state-owned)
- Foreign invested companies or joint venture companies
- Medium-sized domestic food processing companies with a local or regional presence
- Small-scale domestic companies or cottage industries in the “unorganized” sector

Table 8 shows food processors’ share in the market for packed food, dried processed food, noodles, and cooking oils and fats, according to Euromonitor.

**Table 8: Company Shares (by National Brand Owner)**

	2008	2009	2010	2011	2012	2013
<i>Packed food</i>						
Vietnam Dairy Products JSC (Vinamilk)	10.8	12.7	14.9	15.7	15.5	15.8
Masan Consumer Corp	3.1	5.1	5.9	6.4	6.9	7.3
Acecook Vietnam JSC	7.2	7.4	7.4	7.0	6.8	6.8
FrieslandCampina Vietnam Co Ltd	-	5.3	5.7	6.0	6.0	5.9
Cai Lan Oils & Fats Industries Co Ltd	5.1	5.3	5.2	5.3	5.4	5.4
Abbott Vietnam Co Ltd	3.2	3.2	3.2	3.3	3.2	3.3
Kinh Do Corp	2.7	2.8	2.8	3.0	3.1	3.1
Tuong An Vegetable Oil JSC	3.5	3.3	3.2	3.3	2.7	2.8
Nestlé Vietnam Ltd	2.6	2.5	2.5	2.5	2.5	2.6
Mead Johnson Nutrition (Vietnam) Co Ltd	2.1	2.1	2.0	2.0	2.0	2.0
Golden Hope Nha Be Edible Oils Co Ltd	1.9	1.7	1.6	1.6	1.6	1.5
Asia Food Industry Co Ltd	1.8	1.7	1.6	1.6	1.5	1.5
Bien Hoa Confectionery Corp (Bibica)	1.2	1.2	1.2	1.2	1.2	1.2
Ajinomoto Vietnam Co Ltd	1.7	1.5	1.3	1.2	1.0	0.9
Unilever Vietnam International Co Ltd	0.6	0.7	0.8	0.8	0.8	0.9
VIFON - Vietnam Food Industries JSC	1.1	0.9	0.8	0.8	0.8	0.8
Tan Binh Vegetable Oil JSC	1.8	1.3	1.0	0.9	0.9	0.8
Wrigley Vietnam Ltd	1.1	1.0	0.9	0.9	0.8	0.8
Vissan Co Ltd	0.6	0.6	0.7	0.7	0.7	0.7
Saigon Vewong Joint Venture Co	0.9	0.9	0.8	0.8	0.7	0.7
Halong Canned Food JSC	0.6	0.6	0.6	0.6	0.6	0.7
Binh An Vegetable Oil JSC	0.8	0.8	0.8	0.7	0.7	0.6
Perfetti Van Melle Vietnam Ltd	0.7	0.7	0.6	0.6	0.6	0.6
Lotte Vietnam Co Ltd	0.7	0.7	0.6	0.6	0.6	0.6
Lactalis, Groupe	0.6	0.5	0.5	0.5	0.6	0.6
Haiha Confectionery JSC	0.6	0.6	0.6	0.6	0.6	0.6
Royal Food Co Ltd	0.4	0.5	0.5	0.5	0.5	0.5
Fonterra Brands (Vietnam) Co Ltd	0.5	0.5	0.5	0.4	0.5	0.5
Tan Tan Food & Foodstuff Co	0.4	0.5	0.5	0.5	0.5	0.5
Orion Food Vina Co Ltd	0.4	0.4	0.4	0.4	0.5	0.5
Huu Nghi High Quality Confectionery JSC	0.5	0.5	0.5	0.5	0.5	0.5
Bel Vietnam Ltd	0.4	0.4	0.4	0.4	0.4	0.5
Tuyen Ky Co Ltd	0.4	0.4	0.4	0.4	0.4	0.5
Liwayway Food Industry Co Ltd	0.3	0.4	0.4	0.4	0.4	0.4
Colusa Miliket Foodstuff JSC (COMIFOOD)	0.6	0.5	0.5	0.5	0.4	0.4
Cholon Investment & Import-Export Co (CHOLIMEX)	0.4	0.4	0.4	0.4	0.4	0.4

Nhu Lan Bakery	0.5	0.5	0.5	0.5	0.5	0.4
Vietnam Nutrition JSC	0.4	0.4	0.4	0.4	0.4	0.4
Duc Phat Private Enterprise	0.4	0.4	0.4	0.4	0.4	0.4
Hanoi Milk JSC	0.3	0.4	0.4	0.4	0.4	0.4
Special Aquatic Joint-stock Co (SEASPIMEX-VIETNAM)	0.4	0.4	0.4	0.4	0.4	0.4
Thien Huong Food Co	0.6	0.5	0.4	0.4	0.4	0.4
Acecook Vietnam Co Ltd	-	-	0.1	0.3	0.3	0.3
Hai Chau Confectionery JSC	0.4	0.4	0.4	0.3	0.3	0.3
Trung Thanh Co Ltd	0.3	0.3	0.3	0.3	0.3	0.3
Kraft Foods Inc	0.3	0.3	0.3	0.3	0.3	0.3
TH Food Chain JSC	-	-	-	0.1	0.2	0.3
Asia Bakery & Confectionery Pte Enterprise	0.2	0.2	0.2	0.2	0.3	0.3
Hung Thinh Co Ltd	0.2	0.3	0.3	0.3	0.3	0.3
Meiji Holdings Co Ltd	-	0.3	0.3	0.3	0.3	0.3
Nutifood Nutrition Food JSC	0.2	0.2	0.2	0.2	0.3	0.3
Quang Ngai Sugar JSC	0.2	0.1	0.1	0.2	0.2	0.2
Triko Foods Co	0.2	0.2	0.2	0.2	0.2	0.2
An Giang Fisheries Import Export Co (Agifish)	0.2	0.2	0.2	0.2	0.2	0.2
Associated British Foods Plc	0.2	0.2	0.2	0.2	0.2	0.2
Tribeco Binh Duong Co Ltd	-	-	-	-	-	0.2
Ken Ken (Vietnam) Food Mfg Co Ltd	0.2	0.2	0.2	0.2	0.2	0.2
Cau Tre Export Goods Processing JSC	0.2	0.2	0.2	0.2	0.2	0.2
Tan Hiep Phat Group	0.2	0.2	0.2	0.2	0.2	0.2
Vinabico Confectionery JSC	0.2	0.2	0.2	0.2	0.2	0.2
Hipp GmbH & Co Vertrieb KG	0.2	0.2	0.2	0.2	0.2	0.2
Quang Ngai Sugar Co	0.3	0.3	0.2	0.2	0.2	0.2
Lien Thanh Co Ltd	0.1	0.1	0.1	0.1	0.1	0.2
PepsiCo Inc	0.1	0.1	0.1	0.1	0.1	0.1
Bao Ngoc Private Enterprise	0.2	0.2	0.2	0.2	0.2	0.1
Uni-President Vietnam Co Ltd	0.4	0.3	0.2	0.2	0.2	0.1
Mars Confectionery Vietnam	0.2	0.1	0.1	0.1	0.1	0.1
Vinamit JSC	0.1	0.1	0.1	0.1	0.1	0.1
Thuy Ta Co Ltd	0.1	0.1	0.1	0.1	0.1	0.1
Duc Viet Co Ltd	0.0	0.1	0.1	0.1	0.1	0.1
Yakult Vietnam Co Ltd	0.0	0.0	0.1	0.1	0.1	0.1
Apollo Food Industries Sdn Bhd	0.2	0.1	0.1	0.1	0.1	0.1
Vedan (Vietnam) Enterprise Corp Ltd	0.6	0.4	0.3	0.2	0.1	0.1
Trang An Confectionery Co	0.1	0.1	0.1	0.1	0.1	0.1
Long Hai Fish Sauce Enterprise Ltd	0.2	0.2	0.1	0.1	0.1	0.1
European Foods PCL	0.1	0.1	0.1	0.1	0.1	0.1
Agro Nutrition International JSC	0.1	0.1	0.1	0.1	0.1	0.1
Hanh Phuc Co Ltd	0.1	0.1	0.1	0.1	0.1	0.1
Storck KG, August	0.1	0.1	0.1	0.1	0.1	0.1
Miwon Vietnam Co. Ltd	0.2	0.2	0.2	0.1	0.1	0.1
Thuan Phat Food Processing & Trading Co.	0.2	0.1	0.1	0.1	0.1	0.1
Bay Hong Hanh Production Trading Service Co Ltd	0.1	0.1	0.1	0.1	0.1	0.1
Angel Camacho SA	0.1	0.1	0.1	0.1	0.1	0.1
Haiha - Kotobuki JV Co.	0.1	0.1	0.1	0.1	0.1	0.1

Saigon Aquatic Products Trading JSC	0.2	0.1	0.1	0.1	0.1	0.1
Phong Hien Co.	0.1	0.1	0.1	0.1	0.1	0.1
Kim Phong Co.	0.1	0.1	0.1	0.1	0.0	0.0
Tuong Lai Co.	0.1	0.0	0.0	0.0	0.0	0.0
Dong Khanh Food Industrial Co Ltd	0.1	0.1	0.0	0.0	0.0	0.0
Saigon Beverages JSC (Tribeco)	0.2	0.2	0.2	0.2	0.2	-
F&N Vietnam Food Co. Ltd	0.3	0.2	0.1	-	-	-
Dutch Lady Vietnam Food & Beverage Co. Ltd	5.4	-	-	-	-	-
Meiji Dairies Corp	0.2	-	-	-	-	-
Meiji Seika Kaisha Ltd	0.1	-	-	-	-	-
APT Aquatic Products Trading Co.	-	-	-	-	-	-
Cadbury Schweppes Plc	-	-	-	-	-	-
Orion Corp	-	-	-	-	-	-
Unilever Best Foods & Elida P/S Vietnam Co. Ltd	-	-	-	-	-	-
Wrigley Jr Co, William	-	-	-	-	-	-
Artisanal	6.2	5.9	5.5	5.4	5.4	5.2
Others	15.8	14.3	13.0	12.1	12.5	12.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<i><b>Dried Processed Food</b></i>						
Acecook Vietnam JSC	51.6	49.9	49.7	47.8	46.3	45.3
Masan Consumer Corp	1.5	9.8	11.5	14.1	15.6	16.8
Asia Food Industry Co. Ltd.	13.1	11.9	11.8	11.7	11.3	11.1
VIFON - Vietnam Food Industries JSC	7.4	5.9	5.4	5.4	5.5	5.7
Saigon Vewong Joint Venture Co.	4.8	4.8	4.8	4.7	4.6	4.5
Colusa Miliket Foodstuff JSC (COMIFOOD)	4.1	3.5	3.4	3.4	3.3	3.2
Thien Huong Food Co.	4.5	3.5	3.2	2.8	2.6	2.5
Uni-President Vietnam Co. Ltd	3.1	2.1	1.3	1.2	1.2	1.0
Longan Co. Ltd	0.3	0.3	0.3	0.3	0.4	0.4
Vina Food	0.2	0.3	0.3	0.4	0.4	0.4
Tien Giang Foodstuffs Co.	0.1	0.2	0.2	0.2	0.3	0.3
Viet Nguyen Rice Processing Co. Ltd	0.2	0.2	0.2	0.2	0.3	0.3
Everton Vietnam Co. Ltd	0.3	0.2	0.2	0.2	0.2	0.2
Barilla Alimentare SpA	0.1	0.1	0.2	0.2	0.2	0.2
Saigon Union of Trading Cooperatives	0.1	0.1	0.1	0.1	0.1	0.1
Yamadai Co. Ltd	0.1	0.1	0.1	0.1	0.1	0.1
Acecook Vietnam Co. Ltd	-	-	-	-	-	-
Others	8.3	7.0	7.3	7.1	7.8	7.9
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<i><b>Noodles</b></i>						
Acecook Vietnam JSC	52.7	51.0	50.8	49.0	47.5	46.6
Masan Consumer Corp	1.6	10.0	11.8	14.5	16.0	17.3
Asia Food Industry Co. Ltd	13.4	12.2	12.1	12.0	11.6	11.4
VIFON - Vietnam Food Industries JSC	7.5	6.0	5.5	5.5	5.6	5.8
Saigon Vewong Joint Venture Co.	4.9	4.9	4.9	4.8	4.7	4.6
Colusa Miliket Foodstuff JSC (COMIFOOD)	4.2	3.6	3.5	3.5	3.4	3.3
Thien Huong Food Co.	4.6	3.6	3.2	2.9	2.7	2.6

Uni-President Vietnam Co. Ltd	3.2	2.1	1.3	1.2	1.2	1.0
Acecook Vietnam Co. Ltd	-	-	-	-	-	-
Others	8.0	6.6	6.9	6.7	7.3	7.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>Cooking Oils and Fats</b>						
Cai Lan Oils & Fats Industries Co. Ltd	32.6	34.4	35.2	36.2	36.6	36.9
Tuong An Vegetable Oil JSC	22.0	21.3	21.9	22.5	18.6	18.9
Golden Hope Nha Be Edible Oils Co. Ltd	11.9	11.2	11.1	10.9	10.8	10.6
Tan Binh Vegetable Oil JSC	11.3	8.3	6.4	6.2	5.9	5.5
Binh An Vegetable Oil JSC	5.2	5.0	5.2	4.9	4.6	4.4
Acecook Vietnam JSC	-	2.8	3.2	3.5	3.7	3.7
Lactalis, Groupe	3.1	3.1	3.0	3.1	3.1	3.2
Fonterra Brands (Vietnam) Co Ltd	1.0	1.0	1.0	1.1	1.2	1.2
Angel Camacho SA	0.5	0.4	0.4	0.3	0.4	0.4
Generics	0.3	0.2	0.2	0.2	0.1	0.1
Others	12.3	12.4	12.4	11.2	14.9	15.2
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor

Table 9 shows some of the main food and beverage companies in Vietnam in each product category.

**Table 9: Major Food Processing Companies in Vietnam**

Company (Product Types)	Sales (VND Mil) / Year	End-use Channels	Production Location	Procurement Channels
<b>Red Meat and poultry meat</b>				
<b>Ha Long Canned Food Joint Stock Corporation (JSC) (Halong Canfoco)</b> <u>Address:</u> No. 71 Le Lai Street, May Chai Ward, Ngo Quyen District, Hai Phong City <u>Tel:</u> 84313836 692 <u>Fax:</u> 84313836155 <u>Email:</u> <a href="mailto:halong@canfoco.com.vn">halong@canfoco.com.vn</a> <u>Website:</u> <a href="http://canfoco.com.vn">http://canfoco.com.vn</a>  <u>Products:</u> sausages, canned meat, canned fish, frozen products.  <u>Product Brands:</u> Ha Long Canfoco, Bo Bee Bee, Heo Everyday, Bo Everyday, Chip Bong	VND199 billion (Q1,Q2 - 2014) ----- VND485 billion (2013) ----- VND673 billion (2012)	Distributors, retailers (supermarket and hypermarkets food shops, wet markets and small grocers, export, HRI)	Ha Long, Quang Ninh Province	Direct importer; may purchase through other traders/distributors
<b>VISSAN Limited Company (VISSAN)</b>	VND 3	Distributors,	(1) Meat	Direct

<p><u>Address:</u> 420 No Trang Long Street., Ward 13, Binh Thanh District., HCMC  <u>Tel:</u> (84-8)5533 999; 5533888  <u>Fax:</u> (84 8) 5533 939  <u>Email:</u> <a href="mailto:visan@hcm.fpt.vn">visan@hcm.fpt.vn</a>  <u>Website:</u> <a href="http://www.visan.com.vn">www.visan.com.vn</a></p> <p><u>Products:</u> fresh &amp; frozen meats; processed foods; canned foods from meats, seafood and vegetables.</p> <p><u>Product Brands:</u> VISSAN, Hola, Ngon Ngon instant spring roll.</p>	<p>trillion (8 months in 2013);  -----  VND4.37 trillion (2012)</p>	<p>retailers (supermarket, hypermarket, and independent small grocers, export.</p>	<p>Processing Plant in HCMC;  (2) Food Processing Plant in Tien Son Industrial Park, Bac Ninh Province;  (3) Go Sao Pig Farm</p>	<p>importer; Purchases from local producers, or through traders / distributors</p>
<p><b>Duc Viet Foods Company</b>  <u>Address:</u> Seaprodex Building, No. 20 Lang Ha Street, Dong Da, Hanoi, Vietnam  <u>Tel:</u> 84-437764322  <u>Email:</u> <a href="mailto:info@ducvietfoods.vn">info@ducvietfoods.vn</a>  <u>Website:</u> <a href="http://ducvietfoods.vn">http://ducvietfoods.vn</a></p> <p><u>Products:</u> Smoked sausage, Grilled sausage, Beer garden sausage, Country sausage, smoked pork knuckle, smoked pork loin. Traditional products include Vietnamese sausage, pate, clean meat, seasonings, and mustard.</p> <p><u>Product Brands:</u> Duc Viet</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam)</p>	<p>Factory in Hung Yen Province</p>	<p>Direct importer; Purchases from local traders and producers.</p>
<p><b>Fish and seafood products</b></p>				
<p><b>An Giang Fisheries Import Export Co (Agifish)</b>  <u>Address:</u> 1234 Tran Hung Dao street, Binh Khanh, Long Xuyen City, An Giang Province  <u>Tel:</u> +84-76 3852368  <u>Fax:</u>+84-76 3852202  <u>Email:</u> <a href="mailto:info@agifish.com.vn">info@agifish.com.vn</a>  <u>Website:</u> <a href="http://www.agifish.com.vn">http://www.agifish.com.vn</a></p> <p><u>Products:</u> Frozen Fish products, Processed Fish products.</p> <p><u>Product Brands:</u> Agifish.</p>	<p>VND 2.14 trillion (9 months in 2014)</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Processing factory in An Giang Province</p>	<p>Purchases from local traders and producers</p>
<p><b>Special Aquatic Products JSC (SEASPIMEX VIETNAM)</b>  <u>Address:</u> 120 Hoa Binh, Tan Phu District, HCMC  <u>Tel:</u> +84-8-3860 6085  <u>Fax:</u>+84-8-3865 2279  <u>Email:</u> <a href="mailto:seaspimex@hcm.vnn.vn">seaspimex@hcm.vnn.vn</a>  <u>Website:</u> <a href="http://seaspimex.com.vn">http://seaspimex.com.vn</a></p> <p><u>Products:</u> Frozen seafood products,</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.</p>	<p>2 processing factories, one in Binh Chanh District, HCMC; and one in Ben Tre Province</p>	<p>Purchases from own farm and from local traders and producers.</p>

<i>Canned Fish products, sausages. Product Brands: Seaspimex</i>				
<b>Vietnam National Seaproducts Corporation Limited (Seaprodex)</b> <i>Address: 2-4-6 Dong Khoi, District 1, Ho Chi Minh city, Viet Nam Tel: (84-8) 38297214 / 38291924 Fax: (84-8) 38290146 Email: <a href="mailto:seaprodex@hcm.vnn.vn">seaprodex@hcm.vnn.vn</a> Website: <a href="http://seaprodex.com">http://seaprodex.com</a></i>  <i>Products: Frozen seafood products, Canned Fish products, sausages. Product Brands: Seaprodex</i>	About VND 10 trillion in 2013	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.		Direct importer; Purchases from own farms and from local traders and producers.
<b>Uni-President Vietnam</b> <i>Address: 16-18, DT 743 street, Song Than II Industrial Park, Di An Town, Binh Duong, Viet Nam Tel: +84-650-3790811 ~ 6 Email: <a href="mailto:services@upvn.com.vn">services@upvn.com.vn</a> Website: <a href="http://www.uni-president.com.vn">http://www.uni-president.com.vn</a></i>  <i>Products: Frozen seafood products, Product Brands: Uni-President Kitchen King Noodle, Pineapple Noodle Vegetable Beef, Fried waiver Noodles.</i>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.		Direct importer; Purchases from own farms and from local traders and producers.
<b>Dairy products</b>				
<b>Vietnam Dairy Products JSC (Vinamilk)</b> <i>Address: 10 Tan Trao Street, Tan Phu Ward, District 7, Ho Chi Minh City (HCMC), Vietnam (VN) Tel: +84(8)54155555 Fax: +84(8)54161226 Website: <a href="http://www.vinamilk.com.vn">www.vinamilk.com.vn</a></i>  <i>Products: Liquid milk, drinking milk, UHT and pasteurized milk, cheese, yoghurt, UHT drinking yoghurt, Probiotic drinking yoghurt, spoonable yoghurt and sour milk products, powdered milk, and nutrition powder, condensed milk, ice cream, meal replacement, baby food.</i>  <i>Product Brands: Vinamilk, Dumex, Dielac, Sua Ong Tho (Longevity), Truong Tho, Ngoi Sao Phuong Nam (Southern Star), Probiotic Yogurt, Twin Cows, Flex, Susu, Vinamilk Ozela, Probi, ProBeauty, Aloe Vera (Nha Dam), Kefir, Ridielac Alpha, Sue Prevent, Cancipro, Nhoc Kem (Ice cream for kids)</i>	VND 16.9 trillion (1 <sup>st</sup> half 2014) ----- VND 30.9 trillion (2013) ----- VND 26.5 trillion (2012)	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI, airplane service	5 dairy farms in Tuyen Quang, Thanh Hoa, Nghe An, Binh Dinh, and Lam Dong Provinces; 10 dairy factories in Binh Duong, Da Nang, Can Tho, Hanoi, Thanh Hoa, Binh Dinh, HCMC, Nghe An, and Bac Ninh Provinces	Direct importer; Purchases from local producers.
<b>Friesland Campina Vietnam Co. Ltd.</b> <i>Address: Bitexco Financial Tower, 2 Hai Trieu, District 1, floor 16-17, HCMC, VN</i>	Not available to public	Distributors, retailers (supermarkets, hypermarkets	2 factories in Ha Nam and Binh Duong Provinces	Purchases from local producers,

<p>Tel: +84 839156256 Website: <a href="http://www.frieslandcampina.com.vn">www.frieslandcampina.com.vn</a>; <a href="http://www.dutchlady.com.vn/">www.dutchlady.com.vn/</a></p> <p><u>Products:</u> Milk and milk products including drinking milk products, powdered milk, whole milk, yoghurt, yoghurt drinks, and sweetened condensed milk.</p> <p><u>Product Brands:</u> Dutch Lady, Dutch Lady Gold, Friso, Dutch Lady Complete</p>		and independent small grocers across Vietnam)		
<p><b>Nestlé Vietnam Ltd.</b> <u>Address:</u> 5th Floor, Empress Tower 138 – 142 Hai Ba Trung, Đa Kao Ward, District 1, HCMC Tel: 848- 39113737 Fax: 848-38238632 Website: <a href="http://www.nestle.com.vn">www.nestle.com.vn</a></p> <p><u>Products:</u> Nutritional products including milk products</p> <p><u>Product Brands:</u> Isocal powder, Nutren Diabetes, Nutren Fibre, Peptamen, MOM&amp;me, Nestlé Gấu, NestléNAN Kid 4, Fitnessse, Lactogen, Nan, and Cerelac, S-26 Progress Gold.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	3 factories in Dong Nai province	Direct importer; Purchases from local producers, or through traders / distributors
<p><b>Nutifood Nutrition Food JSC</b> <u>Address:</u> 281-283 Hoang Dieu, Ward 6, District 4, HCMC Tel: 84-8-38 267 999 Fax: 84-8-39 435 949 Email: <a href="mailto:nutifood@nutifood.com.vn">nutifood@nutifood.com.vn</a> Website: <a href="http://www.nutifood.com.vn">www.nutifood.com.vn</a></p> <p><u>Products:</u> Milk products</p> <p><u>Product brands:</u> Nutifood; Nuti Fit Gold; Dr. Luxia; Nuti IQ Gold; Nuti IQ; Nuvita Grow; Grow Plus+; NuCalci; En Plus Gold; Diabet Care Gold; Pedia Plus; GOTARI 123; GOTARI 456; Nuti Nguyen Kem (Full cream); Ngu coc dinh duong Canxi (Daily natural nutrition); Ngu Coc Dinh Duong – Beauty (Daily natural nutrition).</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	Plant in My Phuong I industrial park, Ben Cat, Binh Duong Province	Direct importer; Purchases from local producers, or through traders / distributors
<p><b>TH Milk JSC</b> <u>Address:</u> Nghia Son Commune, Nghia Dan District, Nghe An Province Tel: 84-383963090 Fax: 84-383-963091 Website: <a href="http://www.thmilk.vn">http://www.thmilk.vn</a></p> <p><u>Products:</u> Fresh milk, Yogurts, Probiotic Spoon Yogurts, Probiotic Drinking Yogurts, UHT Drinking Yogurts.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers)	1 factory in Nghe An province	Uses only fresh milk from their own farm

<i>Product brands: TH True Milk, TH True Milk TOP KID, TH True Milk Yogurt.</i>				
<p><b>Moc Chau Milk JSC</b>  <u>Address:</u> Km 194, Moc Chau Town, Moc Chau District, Son La Province  Tel: 0223. 866 065  Fax: 0223. 866 184  Email: bosuamocchau@gmail.com  Website: <a href="http://mocchaumilk.com">http://mocchaumilk.com</a></p> <p><u>Products:</u> Pasteurized milk, UHT milk, Yogurts, Cheese, Butter, Milk Candy, Condensed milk,</p> <p><u>Product brands:</u> Moc Chau</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam).	1 factory in Moc Chau, Son La province	Uses only fresh milk from their own farm and farmer households in Son La Province
<p><b>Hanoi Milk JSC</b>  <u>Address:</u> Quang Minh, Me Linh, Hanoi  Tel: 84-4 38866563/67  Fax: 84-4 38866564  Email:  Website: <a href="http://hanoimilk.com.vn">http://hanoimilk.com.vn</a></p> <p><u>Products:</u> UHT milk,</p> <p><u>Product Brands:</u> Izzi, Yotti, Hanoi Milk, Yoha.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam).	1 factory in Hanoi	Direct importer; Purchases from local producers, or other traders / distributors
<p><b>Ba Vi JSC</b>  <u>Address:</u> Tan Linh Commune, Ba Vi District, Hanoi  Tel: 84-4-3388 1200  Fax: 84-4-3388 0826  E-mail: <a href="mailto:bavimilk@yahoo.com.vn">bavimilk@yahoo.com.vn</a>  Website: <a href="http://intimexhcm.com">http://intimexhcm.com</a></p> <p><u>Products:</u> Pasteurized Fresh Milk, Pasteurized Fresh Goat Milk, Goat yogurts, Condensed milk cakes, Goat Condensed Milk Cakes, Caramel.</p> <p><u>Product Brands:</u> Ba Vi, Mountain.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam).	1 factory in Ba Vi, Hanoi	Purchases from local producers, or traders / distributors.
<p><b>International Dairy JSC (IDP)</b>  <u>Address:</u> 15 Tay Ho Street, Quang An, Tay Ho District, Hanoi, Vietnam  Tel: (84 4) 6258 0218  Fax (84 4) 3823 8132  E-mail:  Website: <a href="http://www.idp.vn">http://www.idp.vn</a></p> <p><u>Products:</u> Pasteurized Fresh Milk, UHT Milk, Yogurts, Nutritional Drinks</p> <p><u>Product Brands:</u> Ba Vi, z'Dozi, Love'in Farm, Kun.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), exports.	1 factory in Chuong My, Hanoi and 1 factory in Ba Vi, Hanoi	Direct importer; Purchases from local producers, or traders / distributors
<b>Prepared fruits, prepared vegetables, oilseed products (i.e. sauces, oils and other frozen, canned and dried products)</b>				
<b>Masan Food Corp</b>	VND	Distributors,	Phu Quoc	Direct

<p><u>Address:</u> 12th Floor, Kumho Asiana Plaza No. 39 Le Duan, District 1, HCMC, VN Tel: 84-8-62555660 Fax: 84-8-38109463</p> <p><u>Products:</u> soya sauce, fish sauce, chili sauce.</p> <p><u>Product Brands:</u> Chin-su, Nam Ngu, Tam Thai Tu.</p>	<p>7.5 trillion (Q1+Q2+Q3 2014) ----- VND 11.9 trillion (2013) ----- VND 10.4 trillion (2012)</p>	<p>retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.</p>	<p>Kien Giang province</p>	<p>importer; Purchases from local producers, or through traders / distributors</p>
<p><b>Cai Lan Oils &amp; Fats Industries Co Ltd.</b> <u>Address:</u> Cai Lan Industrial Zone, Ha Long City, Quang Ninh Province, Vietnam Tel: (84 33) 3846 993 Fax: (84 33)3845 971 Email: <a href="mailto:contact@wilmar.com.vn">contact@wilmar.com.vn</a> Website: <a href="http://www.calofic.com.vn">www.calofic.com.vn</a></p> <p><u>Products:</u> Cooking oil products, Shortening, Baking fat, Creaming fat, Ice cream fat, Butter, Margarine, Olein.</p> <p><u>Product Brands:</u> Neptune, Simply, Olivoilà, Meizan, Cai Lan, Kiddy, Satellite, Superior.</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam)</p>	<p>Quang Ninh, Ho Chi Minh City, and Can Tho</p>	<p>Direct importer; May purchase from local producers.</p>
<p><b>Tuong An Vegetable Oil JSC (TAC)</b> <u>Address:</u> 48/5 Phan Huy Ich, Ward 15, Tan Binh District, HCMC, Vietnam. Tel: (84.8)38153972 -3815394 - 38153950 - 38151102 Fax: (84.8) 38153649 Email: <a href="mailto:tuongan@tuongan.com.vn">tuongan@tuongan.com.vn</a> Website: <a href="http://www.tuongan.com.vn">www.tuongan.com.vn</a></p> <p><u>Products:</u> Cooking Oils, butter, margarine, shortening.</p> <p><u>Product Brands:</u> Tuong An, Tuong An Cooking Oil, Van Tho, Canola, Season, Vio Extra, Ngon, Olita, Extra Virgin Olive Oil, Dau Phong (aka Peanut Oil), Dau Me (aka Sesame Oil), Dau Nanh (aka Soybean Oil), Tuong An shortening, Tuong An margarine, Dau dua (aka Coconut Oil), RBD Palm Olein, RBD Plam Oil.</p>	<p>VND 2.02 trillion (Q1+Q2 2014) ----- VND 4.3 trillion (2013) ----- VND 4.06 trillion (2012) ----- VND 4.4 trillion (2011)</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export</p>	<p>Phu My-Ba Ria Vung Tau province and Vinh-Nghe An province</p>	<p>Direct importer; May purchase from local producers.</p>
<p><b>Golden Hope Nha Be Edible Oils Co. Ltd.</b> <u>Address:</u> 370 Go O Moi, Phu Thuan Ward,</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets,</p>	<p>Factory in HCMC</p>	<p>Direct importer; May purchase</p>

<p>District 7, HCMC, Vietnam  Tel: (84.8) 8733005  Fax: (84.8) 8733597  Email: <a href="mailto:customer_service@ghnb.com.vn">customer_service@ghnb.com.vn</a>  Website: <a href="http://www.marvela.vn">www.marvela.vn</a>;  <a href="http://www.ghnb.com.vn">www.ghnb.com.vn</a></p> <p><u>Products:</u> Edible Oils, Palm Oil, Soybean Oil, Shortening, Vegetable cooking oils.</p> <p><u>Product Brands:</u> MARVELA, Golden Hope-Nha Be, Ong Tao oil, Salad oil, Salata, Delio, Sen, Olein oil, Soybean.</p>		hypermarkets and independent small grocers across Vietnam), export		from local producers.
<p><b>Tan Binh Vegetable Oil JSC</b>  <u>Address:</u> 889 Truong Chinh, Tay Thanh, Tan Phu District, HCMC  Phone: 84.8-38153 010  Website: 84-8-38153 226  Email: <a href="mailto:nakydaco@hcm.vnn.vn">nakydaco@hcm.vnn.vn</a>  Website: <a href="http://www.nakydaco.com.vn">www.nakydaco.com.vn</a>;  <a href="http://dauan.com.vn">dauan.com.vn</a></p> <p><u>Products:</u> Cooking Oils</p> <p><u>Products Brands:</u> Cooking Oil, Bep Hong, Vi Gia, Huong Me, Dau Nanh Soya, Dau Me SeSa, Hao Vi, Shortening Nakydaco, Dau Me Thom Nguyen Chat.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	Factory in HCMC	Direct importer; May purchase from local producers.
<b>Confectionary products</b>				
<p><b>Kinh Do Corp. (KDC)</b>  <u>Address:</u> 141 Nguyen Du Street, Ben Thanh Ward, District 1, HCMC, Vietnam  Tel: +84(8)38270838  Fax: +84(8)38270839  Website: <a href="http://www.kinhdo.vn">www.kinhdo.vn</a></p> <p><u>Products:</u> Confectionery Bakery products, FF biscuits, ice cream, sweet and savory snacks, high fiber bread.</p> <p><u>Product Brands:</u> Kinh Do, Kido, Aloha, AFC, Celano, Merino, Cosy, Wel, Wel Grow, Wel Yo, Korento, Sachi, Solite, Slide, Trang Vang.</p>	VND 4.2 trillion (2011)	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Ho Chi Minh City, Hanoi	Direct importer; May purchase from local producers.
<p><b>Nestlé Vietnam Ltd.</b>  <u>Address:</u> 5th Floor, Empress Tower 138 – 142 Hai Ba Trung street, Da Kao Ward, District 1, HCMC, Vietnam  Tel: (08) 39113737  Fax: (08) 38238632  Website: <a href="http://www.nestle.com.vn">www.nestle.com.vn</a></p> <p><u>Products:</u> Confectionery, mineral water, Instant coffee products, malt drinks, soya sauce, oyster sauce, bouillon, Nutritional</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	3 factories in Dong Nai province; 1 LaVie Factory in Long An province; 1 La Vie Factory in Hung Yen province.	Direct importer; Purchase from local producers, or through traders / distributors

<p><i>products.</i></p> <p><b><i>Product Brands:</i></b> Kit Kat, Corn Flakes, Honey Stars, Koko Krunch, Milo, Nescafé, Nescafé 3in 1, Nescafé Viet, Nestcafé Red Cup, Coffee Mate, Fruit Time, Maggi, Milky Time, La Vie Mineral Water, Isocal powder, Nutren Diabetes, Nutren Fibre, Peptamen, MOM&amp;me, Nestlé Gáu, NestléNAN Kid 4, Nestea, Nestvita, Fitnessse, Lactogen, Nan, and Cerelac, S-26 Progress Gold.</p>				
<p><b>Bien Hoa Confectionery Corp (Bibica)</b>  <b><i>Address:</i></b> 443 Ly Thuong Kiet St, Ward 8, Tan Binh District, Ho Chi Minh City, Vietnam  <b><i>Tel:</i></b> +84 (8) 3971 7920/  +84 (8) 3971 7921  <b><i>Fax:</i></b> +84 (8) 3971 7922  <b><i>Website:</i></b> <a href="http://www.bibica.com.vn">www.bibica.com.vn</a></p> <p><b><i>Products:</i></b> Bakery products ( cookies, sugar confectionery, layer cakes, moon cakes), beverages (soft drinks), chocolate confectionery and nutritional products ( cereals, nutrition powder) for children and pregnant women, diet products for health-conscious consumers</p> <p><b><i>Product Brands:</i></b> Bicara, Hura, Volcano, Bella.</p>	<p>VND 435 billion (Q1+Q2 2014) ----- VND 1,659 billion (2013) ----- VND 938.97 billion (2012) ----- VND 1,009 billion (2011)</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>4 factories in Dong Nai; Binh Duong; Hanoi, Hung Yen provinces</p>	<p>Direct importer; Purchases from local producers, or through traders / distributors</p>
<p><b>Orion Food Vina Food Co., Ltd.</b>  <b><i>Address 1:</i></b> Ho Chi Minh City, Road NA 3, My Phuoc Industrial Park 2, Binh Duong Province  <b><i>Tel:</i></b> 84-650-553 700  <b><i>Fax:</i></b> 84-650-553720</p> <p><b><i>Address 2:</i></b> Hanoi, Yen Phong Industrial Park, Yen Phong District, Bac Ninh Province  <b><i>Tel:</i></b> 84-241-369 9000  <b><i>Fax:</i></b> 84-241-369 9111  <b><i>Email:</i></b> <a href="mailto:orionhcm@orionworld.com">orionhcm@orionworld.com</a>  <b><i>Website:</i></b> <a href="http://www.orionworld.com">http://www.orionworld.com</a></p> <p><b><i>Products:</i></b> Confectionery products such as pies, cookies, cakes, biscuits, candy and jelly, gums, and chocolate</p> <p><b><i>Product Brands:</i></b> Chocopie, Custas, Freshpie, Goute.</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Plant in My Phuoc Industrial Park 2, Binh Duong Province; Plant in Yen Phong Industrial Park, Yen Phong District, Bac Ninh Province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<b>Snack foods (Savory and sweet snacks and nuts)</b>				
<p><b>Tan Tan Food &amp; Foodstuff Co.</b>  <b><i>Address:</i></b> 32C Noi Hoa Ward, Binh An</p>	<p>Not available to public</p>	<p>Distributors, retail</p>	<p>Plant in Binh Duong</p>	<p>Direct importer;</p>

<p><i>Commune, Di An District, Binh Duong Province</i>  <i>Tel: 84-650-3781 968</i>  <i>Fax: 84-650-3781 928</i>  <i>Website: <a href="http://www.tantan.com.vn">http://www.tantan.com.vn</a></i></p> <p><i>Products: Snack food (peas, peanuts and cashew nuts)</i></p> <p><i>Product brands: Tan Tan, Amero, Chocoplus, FunMix, Tan Tan Roasted Peanuts, Dau Phong da ca, Tan Tan Wasabi, Salted Green Peas; nice sweet, kazoo, smile, Vinacashew.</i></p>		<p>(supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Province</p>	<p>Purchase from local producers, or through traders / distributors</p>
<p><b>Liwayway Food Industry Co., Ltd.</b></p> <p><i>Address: 14 Str. 5, Vietnam-Singapore Industrial Zone., Thuan An Dist., Binh Duong Province</i>  <i>Tel: 84-650-3743118</i>  <i>Fax: 84-650-3743123</i>  <i>Email: <a href="mailto:lmcbd@hcm.vnn.vn">lmcbd@hcm.vnn.vn</a></i>  <i>Website: <a href="http://www.oishi.com.ph">www.oishi.com.ph</a></i>  <i>Products: Snack food</i></p> <p><i>Product brands: Oishi Prawn Crackers</i></p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Plant in Binh Duong Province;</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>PepsiCo Foods Company</b></p> <p><i>Address: 5<sup>th</sup> Floor, Sheraton Hotel, 88 Dong Khoi, District I, HCMC</i>  <i>Tel: +84-8-38219438</i>  <i>Fax: +84-8-3936 9934</i>  <i>Website: <a href="http://www.suntorypepsico.vn">http://www.suntorypepsico.vn</a></i></p> <p><i>Products: Snack food (potato chips)</i></p> <p><i>Product brands: Poca</i></p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Plant in Song Than 3 Industrial Park, Binh Duong Province</p>	<p>Direct importer; Purchase from local producers, or through other traders / distributors</p>

<p><b>Orion Food Vina Food Co., Ltd.</b>  <u>Address 1:</u> Ho Chi Minh City, Road NA 3, My Phuoc Industrial Park 2, Binh Duong Province  Tel: 84-650-553 700  Fax: 84-650-553720</p> <p><u>Address 2:</u> Hanoi, Yen Phong Industrial Park, Yen Phong District, Bac Ninh Province  Tel: 84-241-369 9000  Fax: 84-241-369 9111</p> <p>Email: <a href="mailto:orionhcm@orionworld.com">orionhcm@orionworld.com</a>  Website: <a href="http://www.orionworld.com">http://www.orionworld.com</a></p> <p><u>Products:</u> Snack food</p> <p><u>Product brands:</u> Snack O'star, Snack Toonies.</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Plant in My Phuoc Industrial Park 2, Binh Duong Province; Plant in Yen Phong Industrial Park, Yen Phong District, Bac Ninh Province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>VINAMIT Joint Stock Company</b>  <u>Address:</u> 19f, Vincom center, 72 Le Thanh Ton, District 1, Ho Chi Minh City, Vietnam  Tel: 84-8-38 272 555  Fax: 84-8-38 251 868  Email: <a href="mailto:contact@vinamit.com.vn">contact@vinamit.com.vn</a>  Website: <a href="http://www.vinamit.com.vn">http://www.vinamit.com.vn</a></p> <p><u>Products:</u> Snack food: dried fruit, sweet potato, Rockmelon Banana Chips, Chocolate flavor banana chips, apple chips, peanut candy</p> <p><u>Product brands:</u> Vinamit, Vinatural, Barley, Fomeli, Follow me, LV.</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Plant in 81/3, Ward 1, Tan Dinh Commune, Ben Cat District, Binh Duong Province</p>	<p>Direct importer; purchase from local producers, or through other traders / distributors</p>
<p><b>Beverages</b></p>				
<p><b>Sai Gon Beer Corporation (Sabeco)</b>  <u>Address:</u> 06 Hai Ba Trung Street, District 1, Ho Chi Minh City, Vietnam  Tel: +84.8.38294083  Fax: +84.8.38296856  Website: <a href="http://sabeco.com.vn">http://sabeco.com.vn</a></p> <p><u>Products:</u> Beer, liquor, soft drinks, mineral water,</p> <p><u>Product Brands:</u> 333 Premium, Saigon Lager, 333, Saigon Export, Saigon Special, Chu Hi, Dakai</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Factories in HCMC, Phu Yen, Can Tho, Soc Trang, and Ha Tinh Provinces</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>Hanoi Beer Corporation (Habeco)</b>  <u>Address:</u> 183 Hoang Hoa Tham, Ba Dinh, Hanoi, Vietnam  Tel: +84.4.39922948/4.38453843  Fax: +84. 4.37223784  Email: <a href="mailto:habecotrading@vnn.vn">habecotrading@vnn.vn</a> ;</p>	<p>VND 9.03 trillion  In 2013  -----  VND 8.92 trillion in</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers</p>	<p>3 factories in Hanoi; 1 factory in Hai Duong Province; 1 factory in</p>	<p>Direct importer; Purchase from local producers, or through</p>

<p><a href="mailto:habecotrading@habeco.com.vn">habecotrading@habeco.com.vn</a> Website: <a href="http://www.habeco.com.vn">http://www.habeco.com.vn</a></p> <p><u>Products:</u> Beer, Liquor</p> <p><u>Product Brands:</u> Hanoi Beer, Truc Bach, Ruou Ha noi, Hanoi Beer Premium</p>	2012	across Vietnam), export, HRI	Hai Phong; 1 factory in Thai Binh Province; 1 factory in Quang Ninh Province; 1 factory in Nam Dinh Province; 1 factory in Thanh Hoa Province; 1 factory in Quang Binh Province; 1 factory in Phu Tho Province; 1 factory in Quang Tri Province	traders / distributors
<p><b>Suntory PepsiCo Vietnam Beverage (SPVB)</b> <u>Address:</u> 5<sup>th</sup> Floor, Sheraton Hotel, 88 Dong Khoi, District I, HCMC <u>Tel:</u> +84-8-38219438 <u>Fax:</u> +84-8-3936 9934 <u>Website:</u> <a href="http://www.suntorypepsico.vn">http://www.suntorypepsico.vn</a></p> <p><u>Products:</u> Carbonated Soft Drinks, Energy Drink, Bottled Water, Juice Drink, Tea, Soy Milk drinks</p> <p><u>Product Brands:</u> Pepsi, Pepsi-Cola, 7UP, 7Up Revive, Sting, Mirinda, Tropicana Twister, Twister Pineapple. Lipton, Lipton Green Tea, Oolong Tea+ Plus, Mountain Dew, and Aquafina.</p>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Hoc Mon Plant in HCMC; Dien Ban Plant in Quang Nam province; Plant in Binh Duong Province; Can Tho Plant in Can Tho Province; Plant in Dong Nai Province.	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Coca Cola Vietnam</b> <u>Address:</u> Km 17, Hanoi Boulevard, Linh Trung Ward, Thu Duc District, HCMC, Vietnam. <u>Tel:</u> 84-8-38961000 <u>Fax:</u> 84-8-38972831 <u>Website:</u> <a href="http://coca-cola.vn">coca-cola.vn</a></p> <p><u>Products:</u> Carbonated Drinks, bottled drinks, mineral drinking water, milk products.</p> <p><u>Product Brands:</u> Coca-Cola, Joy, Samurai, Sunfill, Fanta Chanh, Fanta Dâu, Soda Chanh, Diet Coke, Minute Maid, Splash; Dasani, Nutriboost.</p>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Plant in Hanoi; Plant in Da Nang; Plant in Ho Chi Minh City;	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Tan Hiep Phat Beverage Group</b></p>	Not available	Distributors,	Plant in Binh	Direct

<p><i>Address:</i> 219, Binh Duong Boulevard, Vinh Phu, Thuan An, Binh Duong Province, Vietnam  <i>Tel:</i> +84- 650-3755-161  <i>Website:</i> <a href="http://www.thp.com.vn">http://www.thp.com.vn</a></p> <p><i>Products:</i> Tea drinks, nutrition drinks, soya milk, beer, coffee, drinking water.</p> <p><i>Product Brands:</i> Dr. Thanh, Number 1-Vitamin, Tra Xanh Khong Do, Number 1 Juice, Number 1 Soya, I-kun, Number 1 Chino, Gold-Draught Beer, Gold Ben Thanh Beer, Laser Beer, Flash Beer, VIP café, Active, Tra Bi Dao.</p>	to public	retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Duong Province; Plant in Ha Nam Province; Plant sin Chu Lai, Quang Nam Province.	importer; Purchase from local producers, or through other traders / distributors
<p><b>Masan Food Corp</b>  <i>Address:</i> 12<sup>th</sup> Floor, Kumho Asiana Plaza, No. 39 Le Duan, District 1, HCMC, Vietnam.  <i>Tel:</i> 84-8-62555660  <i>Fax:</i> 84-8-38109463  <i>Website:</i> <a href="http://www.masangroup.com">www.masangroup.com</a></p> <p><i>Products:</i> Beverage products, including bottled beverages and coffee products</p> <p><i>Product Brands:</i> Vinacafé, Wake Up.</p>	<p>VND 7.5 trillion (Q1+Q2+Q3 2014)</p> <p>-----</p> <p>VND 11.9 trillion (2013)</p> <p>-----</p> <p>VND 10.4 trillion (2012)</p>	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.	Bien Hoa-Dong Nai province	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Vietnam Coffee Corporation (Vinacafe)</b>  <i>Address:</i> 211-213-213A Tran Huy Lieu, Ward 8, Phu Nhuan District, HCMC.  <i>Tel.:</i> (84-8) 54 495 514  <i>Fax:</i> (84-8) 54 495 513  <i>Email:</i> <a href="mailto:vinacafe@hn.vnn.vn">vinacafe@hn.vnn.vn</a>  <a href="mailto:info@vinacafe.com.vn">info@vinacafe.com.vn</a>;  <i>Website:</i> <a href="http://www.vinacafe.com.vn">www.vinacafe.com.vn</a></p> <p><i>Products:</i> Green coffee beans, roasted coffee, instant coffee</p> <p><i>Product Brands:</i> Vinacafe, Vinacafe Natural, Vinacafe Select, Washed Robusta, Unwashed Robusta</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.	Plants in Dak Lak Province; Plant in Gia Lai Province; Plant in Dong Nai Province; Plant in Kon Tum Province; Plant in Bac Ninh Province;	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Trung Nguyen Coffee</b>  <i>Address:</i> 82-84 Bui Thi Xuan, District 1, HCMC, Vietnam  <i>Tel:</i> (84.8) 39251852  <i>Fax:</i> (84.8) 39251848  <i>Email:</i> <a href="mailto:office@trungnguyen.com.vn">office@trungnguyen.com.vn</a>  <i>Website:</i> <a href="http://www.trungnguyen.com.vn">www.trungnguyen.com.vn</a></p> <p><i>Products:</i> Green Coffee beans, Instant coffee and roasted coffee</p> <p><i>Product Brands:</i> Trung Nguyen, G7, Gu Manh, Weasel coffee, Legendee, Brothers,</p>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	2 Plant in Binh Duong Province; Plant in Dak Lak Province; Plant in Bac Giang Province	Direct importer; Purchase from local producers, or through other traders / distributors

<p><i>Sang Tao 1, Sang Tao 2, Sang Tao 3, Sang Tao 4, Sang Tao 5, Sang Tao 8, House Blend, Premium Blend, Gourmet Blend, S Chinh Phuc, I Khat Vong, Suc Song, Che Phin 1, Che Phin 2, Che Phin 3, Che Phin 4, Che Phin 5, Ca phe Tuoi – Gu Truyen Thong, Dieu, Ca phe Tuoi – Gu Sanh Dieu, G7 3in1, Roasted coffee Espresso-Arabica Premium, Drip-Robusta Braxin, Drip-Arabika Eakmat, Drip Chon (Weasel), Drip – Culi Robusta, Drip-Culi Arabica, Drip – Robusta Arabica, Drip – Arabica Se, Drip-Premium Culi, G7 Cappuccino Mocha, G7 Cappuccino Chocolate, G7 Cappuccino Hazelnut, Passiona 4in1, White Coffee Bac Siu, G7 2in 1, Gu Manh 2in1, G7 Hoa tan den.</i></p>				
<p><b>Vietnam Tea Corporation (Vinatea)</b>  <u>Address:</u> 92 Vo Thi Sau Street, Hai Ba Trung District, Hanoi, Vietnam.  <u>Tel:</u> 84-4-36226990  <u>Email:</u> <a href="mailto:info@vinatea.com.vn">info@vinatea.com.vn</a>  <u>Website:</u> <a href="http://www.vinatea.com.vn">www.vinatea.com.vn</a></p> <p><u>Products:</u> Green Tea,</p> <p><u>Product Brands:</u> Vinatea, Tra Thai-Long Dinh, Tan Cuong Thai Nguyen, Che Shan vien, Che Nhai, Olong, Thien Huong, Tra den OPA, Tra den OP, Che Suoi Giang, Che Long Van, Moc Chau.</p>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	3 Plants in Moc chau, Son La Province; 1 Plant in Soc Son, Hanoi; 1 plant in Thai Nguyen Province; 1 Plant in Yen Bai Province; 1 plant in HCMC; 1 Plant in Hanoi;	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Vietnam Dairy Products JSC (Vinamilk)</b>  <u>Address:</u> 10 Tan Trao Street, Tan Phu Ward, District 7, Ho Chi Minh City (HCMC), Vietnam (VN)  <u>Tel:</u> +84(8)54155555  <u>Fax:</u> +84(8)54161226  <u>Website:</u> <a href="http://www.vinamilk.com.vn">www.vinamilk.com.vn</a></p> <p><u>Products:</u> Fruit juice and soft drinks, bottle drinking water, salty lemonade, tea, soymilk.</p> <p><u>Product brands:</u> Vfresh 100% Fruit Juice, Vfresh Juki Mix Fruit &amp; Vegetable Nectar, Aloe Vera Drinks, ICY, Lincha Lingzhi Tea, Vresh Artichoke Tea, Gold High Protein Soy, GoldSoy Canxi-D Soymilk, GoldSoy Canxi-D Corn Flavour Soymilk.</p>	VND 16.9 trillion (1 <sup>st</sup> half 2014) ----- VND 30.9 trillion (2013) ----- VND 26.5 trillion (2012)	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI, airplane service.	Factory in Dong Thap Province;	Direct importer; Purchase from local producers, or through traders / distributors
<p><b>Nestlé Vietnam Ltd</b>  <u>Address:</u> 5th Floor, Empress Tower 138 – 142 Hai Ba Trung street, Da Kao Ward, District 1, HCMC, Vietnam  <u>Tel:</u> 84-839113737</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent	3 factories in Dong Nai province; 1 La Vie Factory in	Direct importer; Purchase from local producers, or

<p>Fax: 84-8-38238632 Website: <a href="http://www.nestle.com.vn">www.nestle.com.vn</a></p> <p><u>Products:</u> mineral water, instant coffee products, malt drinks.</p> <p><u>Product Brands:</u> Milo, Nescafé, Nescafé 3in 1, Nescafé Viet, Nestcafé Red Cup, Coffee Mate, La Vie, Nestea.</p>		<p>small grocers across Vietnam), export</p>	<p>Long An province; 1 La Vie Factory in Hung Yen province.</p>	<p>through traders / distributors</p>
<p><b>Unilever Vietnam International Co. Ltd.</b> <u>Address:</u> 156 Nguyen Luong Bang Avenue, Tan Phu Ward, District 7, HCMC, Vietnam Tel: +8408 38236651 Fax: Website: <a href="http://www.unilever.com.vn">www.unilever.com.vn</a></p> <p><u>Products:</u> Foods and tea-based beverages</p> <p><u>Product Brands:</u> Wall's ice cream, Knorr, Lipton, Hellmann's Real Mayonnaise.</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export.</p>	<p>Cu Chi District, HCMC</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>Dry goods and condiments (i.e. canned soup, dry mixes, pasta, pet food, seasonings)</b></p>				
<p><b>Ajinomoto Vietnam Co. Ltd.</b> <u>Address:</u> 22<sup>nd</sup> floor, Centec Tower, 72-74 Nguyen Thi Minh Khai, District 3, HCMC Tel: (84-8) 3930 8784 Fax: (84-8) 3930 2399 Email: <a href="mailto:tvkh@ajinomoto.com.vn">tvkh@ajinomoto.com.vn</a> Website: <a href="http://www.ajinomoto.com.vn">http://www.ajinomoto.com.vn</a></p> <p><u>Products:</u> Umami Seasonings, Flavor Seasonings, Liquid Seasonings, Complete Seasonings, Beverage</p> <p><u>Product Brands:</u> Ajinomoto®, Aji-Mayo Mayonnais, Phu Si Soy Sauce, Ajinomoto® Fermented Rice Vinegar, Aji-Quick® Chicken Crispy Flour, Aji-Quick® Seafood Crispy Flour, Aji-Quick®Thai's Hotpot, Birdy®Canned Coffee</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export.</p>	<p>2 factories in Dong Nai province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>Specialized food ingredients (i.e. additives, preservations, thickeners, sweeteners)</b></p>				

<p><b>Holafoods Jsc</b>  <u>Address:</u> 11<sup>th</sup> floor, HH3 Building, My Dinh New Urban Area – Me Tri, Nam Tu Liem, Hanoi, Vietnam  Tel:84-4-35377010  Fax:84-4-35377009  <u>Branch Office:</u> 27B Nguyen Thong, Ward 7, District 3, HCMC, Vietnam  Tel: 84-8-39302 562  Fax: 84-8-39302 563  Website: <a href="http://www.holafoods.com.vn">www.holafoods.com.vn</a>  Email: <a href="mailto:info@holafoods.com.vn">info@holafoods.com.vn</a></p> <p><u>Type:</u> Importer, Distributor, Trader</p> <p><u>Products / Services :</u>  Food Additive, Acidity Regulator, Flour Treatment Agent, Food Acid, Gelling Agent, Glazing Agent, Grasse, Milk Replacer, Amino Acid, Feed Acidifier, Feed Antioxidant, Feed Concentrate, Growth Promoter, Nutritional Liquid Additive, Mold Inhibitor, Pellet Binder, Toxin Binder, Coccidiostatics Premix, Humectant, Improving Agent, Mineral salt, Food Preservative, Seasoning, Anti-caking Agent, Sequestrate, Food Stabilizer, Sweetener, Food Thickener, Natural Gum, Anti-foaming Agent, Food Coloring Agent, Color Retention Agent, Emulsifier, Firming agent, Flavor Enhancer, Enzyme.</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export.</p>	<p>Office in Hanoi and HCMC</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>Asia Saigon Food Ingredient (AFI)</b>  <u>Address:</u> Lot C-9E-CN, My Phuoc 3 Industrial Park, Ben Cat District, Binh Duong Province, Vietnam.  Tel: +84-650- 3510-175  Fax: +84- 650-3510-176</p> <p><u>Products:</u> Food Ingredients, Creamer</p> <p><u>Product Brands:</u> Vina Creamer, Premium Creamer, Golden Cream, A Cream, Vina Cereal</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export.</p>	<p>Factory in Binh Duong province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p><b>Prepared meals (mixed ingredient “ready-to-eat” or “ready-to-heat: retail and food service meals and entrees, noodles)</b></p>				
<p><b>Acecook Vietnam JSC</b>  <u>Address:</u> Lot II-3, Road No. 11, Tan Binh Industrial Park, Tay Thanh Ward, Tan Phu District, HCMC, Vietnam.  Tel: (84-8) 8154064  Fax: (84-8) 8154067  E-mail : <a href="mailto:acecookvietnam@vnm.vn">acecookvietnam@vnm.vn</a>  Website:  <a href="http://www.acecookvietnam.com">www.acecookvietnam.com</a>; <a href="http://www.vina-acecook.com">www.vina-acecook.com</a></p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.</p>	<p>(1) Hung Yen, (2) Bac Ninh, (3) Da Nang, (4) Binh Duong, (5) Tan Binh Dis.-HCMC, (6) Vinh Long, (7) Can Tho, (8) Hanoi</p>	<p>Direct importer; Purchases from local producers.</p>

<p><i><u>Products:</u> Instant noodles, vermicelli, Pho, porridge, cooking oil soup powder and sauces</i></p> <p><i><u>Product Brands:</u> Vina Acecook Hao Hao, De NhatMyGia, Enjoy, Phu Huong, My Lau Thai, Udon, SukiSuki, Modern, Mikochi, Pho Xua&amp;Nay, Chip Chip, Hit Ha, The Gioi Mi, Yummy, Mibig, Hang Nga, Tao Quan, Dua Tre, Hao 100, Bon Phuong, Sao Sang, Good, Nhip Song, Nho Mai Mai, Mien Phu HuongYenTiec, Mi Kim Chi, Kingcook, Good 100, Oh! Ricey, Real Pho, Bun Gio Heo, Bestcook, Daily, Nicecook, Wonton, Noodle, King Chef.</i></p>				
<p><b>Asia Food Industry Co. Ltd. (ASIA FOODS)</b>  <i><u>Address:</u> 1B, An Phu Commune, Thuan An District, Binh Duong Province, Vietnam</i>  <i>Tel: +84-650-3712888</i>  <i>Fax: +84-650-3711218</i>  <i>Email: <a href="mailto:info@asiafood-vietnam.com">info@asiafood-vietnam.com</a></i>  <i>Website: <a href="http://www.asiafood-vietnam.com">www.asiafood-vietnam.com</a></i></p> <p><i><u>Products:</u> noodle, porridge and Pho</i></p> <p><i><u>Product Brands:</u> Gau Do (Red Bear instant noodle), Soi Pho Vang (Pho Golden String), Gau Yeu (lovely bear instant noodle), Hello instant noodle, Hello Rice Gruel, Shangha Rice Gruel, Hao Hang, Vifood instant noodle</i></p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export</p>	<p>2 factories in Binh Duong province and 1 factory in Bac Ninh province.</p>	<p>Direct importer; Purchases from local producers.</p>
<p><b>Vietnam Food Industries Joint Stock Company (VIFON)</b>  <i><u>Address:</u> 913 Truong Chinh Street , Tay Thanh, Tan Phu District, HCMC</i>  <i>Tel: 84-8- 38153933</i>  <i>Fax: 84-8-83853059</i>  <i>Website: <a href="http://www.vifon.com.vn">http://www.vifon.com.vn</a></i></p> <p><i><u>Products:</u> Chili Sauces; Soup powder, Instant Noodle, Instant Porridge Instant Vermicelli, Instant Pho.</i></p> <p><i><u>Product Brands:</u> VIFON, Ngon Ngon, ROMA, Tu Quy, Viet CUISINE, Hoang Gia, Pho, Phu Gia, Bun Rieu Cua, Banh Da Cua.</i></p>	<p>VND 1.05 trillion (2013)  -----  VND 1.01 trillion (2012)</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export.</p>	<p>Factory in</p>	<p>Direct importer; Purchases from local producers</p>
<p><b>Uni-President Vietnam</b>  <i><u>Address:</u> 16-18, DT 743 street, Song Than II Industrial Park, Di An Town, Binh Duong, Vietnam</i>  <i>Tel: +84-650-3790811 ~ 6</i>  <i>Email: <a href="mailto:services@upvn.com.vn">services@upvn.com.vn</a></i></p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers</p>	<p>Factory in Binh Duong province</p>	<p>Direct importer; Purchase from own farms and from local traders</p>

<p>Website: <a href="http://www.uni-president.com.vn">http://www.uni-president.com.vn</a></p> <p><u>Products:</u> Noodles</p> <p><u>Product Brands:</u> Uni-President, Kitchen King Noodle, Pineapple Noodle Vegetable Beef, Fried waiver Noodles, Uni-Tom, Tieu Nhi, Unif Cup, King Chef, Unif.</p>		<p>across Vietnam), Export.</p>		<p>and producers.</p>
<p><b>Colusa Miliket Foodstuff JSC (COMIFOOD)</b></p> <p><u>Address:</u> 1230 Kha Van Can St., Dist. Thu Duc, Ho Chi Minh City, Vietnam</p> <p><u>Tel:</u> 84-8-8966835; 84-8- 7201423</p> <p><u>Fax:</u> 84-8- 8966772</p> <p><u>Email:</u> <a href="mailto:colusa@hcm.vnn.vn">colusa@hcm.vnn.vn</a></p> <p><u>Website:</u> <a href="http://www.miliket-vn.com">http://www.miliket-vn.com</a> <a href="http://comifood.com">http://comifood.com</a></p> <p><u>Products:</u> Instant Noodles</p> <p><u>Product Brands:</u> Colusa- Miliket; Colusa; Mi hai tom huong vi Sate, (Instant noodle with Sate flavor); Mi hai tom huong vi hai san (Instant noodle with seafood flavor); Mi hai tom chua cay cao cap (Instant noodle with sour hot flavor); Mi bo bit tet (beef steak instant noodle); Mi Tom Ga (Chicken-Shrimp instant noodle); Mi ga xanh (Chicken flavor instant noodle); Mi Ga cao cap (Chicken instant noodle); Mi tom Sa te (Satay flavor instant noodle); Mi Tom (Shrimp flavor noodle); Pho ga dac biet (Chicken flavor rice noodle); Pho Ga (Chicken rice noodle); Bun Tom Thit (Shrimp Pork flavor instant rice noodle); Bun Xao Kho (Instant Rice Noodle with assorted flavor); Bun xao chay (Instant Rice Noodle with vegetarian flavor); Miliket Hu Tieu Nam Vang; Mien Ga (Chicken flavor instant vermicelli); Mien Cua (Crab flavor instant vermicelli).</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Factory Ho Chi Minh City</p>	<p>Direct importer; Purchases from own farms and from local traders and producers.</p>

Source: Euromonitor, Company websites, Stock Exchange Websites

Note: Most information has been sourced from company websites. This list is neither exhaustive nor prioritized in any particular order. Sales figures are mentioned for those companies for which information is publically available.

#### D. SECTOR TRENDS

According to Euromonitor, sales of packaged foods grew 7 percent in volume and 13.7 percent in value in 2013 (See table 10 and table 11). The growth forecast for sales of packaged foods in 2014 is 6.5 percent, and at about 6 percent after 2014. On volume terms, sales of all processed foods categories have increased significantly between 2008 and 2013. A number of factors have combined to spur the increase in the consumption of packaged foods such as strong economic growth, rapid urbanization,

growing modern retail sector, the emergence of foreign and international brands in the market, significant improvement in quality, packaging, and marketing campaigns of food processors, and growing popularity of chain foodservice operators.

The modern retail sector (supermarkets, hypermarkets, minimarts, and convenient stores chains) is expanding rapidly in urban areas, but the traditional retail sector (traditional markets, open-air wet markets, and food small private shops) will continue to dominate the distribution system for incoming years. With the spread of cafes, chain restaurants, and the modern retail sector, the food processing industry is expected to expand to service the domestic market. Additionally, Vietnam's continued economic integration, through the negotiation of many bilateral and multilateral free trade agreements, will create additional incentives for food processors who want to use Vietnam as a platform to reach other markets.

With rapid urbanization and rising disposable income level, Vietnamese consumers' demand for convenient pre-packed food, high quality and hygienic food is increasing. In urban areas, busier lifestyle is driving consumption of convenient and processed foods. Fast food chains attract young generations. Consumers in urban areas seek convenience and good quality in processed foods. For higher value frozen and refrigerated processed foods, sales are almost exclusively in urban areas. Lower income, rural areas tend to prefer fresh ingredients as well as reasonably priced shelf-stable foods, which remain very popular in the traditional retail sector.

Vietnamese consumers are increasingly concerned about healthy food products, and the demand for low-fat, low sodium, and sugar-free food products is increasing.

**Table 10: Sales Volume of Packaged Food by Category (Volume 2008-2013)**

<b>Unit: Thousand tons</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Baby Food	42.31	49.16	56.20	63.22	70.29	75.98
Bakery	377.97	406.77	440.39	474.34	510.44	546.47
Canned/Preserved Food	21.31	25.6	29.89	35.06	39.09	43.7
Chilled Processed Food	4.32	5.17	6.35	7.81	9.46	11.40
Confectionery	41.04	44.53	48.28	52.00	55.37	58.41
Dairy products	487.87	548.08	632.15	706.77	790.60	865.84
Dried Processed Food	305.00	334.99	374.26	389.85	408.8	428.15
Frozen Processed Food	12.71	14.39	16.22	18.91	22.45	26.64
Ice Cream	18.43	19.35	20.43	21.58	22.89	24.33
Meal Replacement	0.79	0.83	0.88	0.93	0.99	1.06
Noodles	294.91	323.5	361.06	374.76	390.53	406.33
Oils and Fats	492.51	536.7	582.22	630.42	680.81	730.5
Pasta	0.70	0.83	0.99	1.20	1.38	1.57
Ready Meals	5.09	5.91	6.90	7.87	8.91	10.07
Sauces, Dressings and Condiments	320.21	362.44	389.63	426.47	461.01	488.98
Spreads	0.96	1.04	1.13	1.21	1.29	1.37

<b>Unit: Thousand tons</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Sweet and Savoury Snacks	27.12	29.62	32.31	34.79	37.46	40.50
Impulse and Indulgence Products	169.86	185.11	202.15	219.21	237.14	255.38
Nutrition/Staples	1,623.53	1,785.29	1,985.35	2,155.07	2,340.90	2,516.25
Meal Solutions	363.65	413.52	448.99	496.11	540.91	580.78
Packaged Food	2,152.55	2,378.68	2,630.34	2,863.34	3,110.93	3,343.32

Source: Euromonitor

**Table 11: Sales Value of Packaged Food by Category (Value 2008-2013)**

<b>Unit: VND billion</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Baby Food	9,119.6	11,693.0	14,484.8	17,196.2	19,011.4	22,002
Bakery	10,796.98	12,532.81	14,561.77	17,176.39	19,616.72	21,782
Canned/Preserved Food	1,077.53	1,379.23	1,715.99	2,139.43	2,547.99	3,015
Chilled Processed Food	331.15	417.59	536.57	681.99	858.02	1,050
Confectionery	3,801.66	4,261.89	4,790.79	5,586.84	6,204.07	6,767
Dairy products	13,584.34	16,393.81	21,246.59	26,635.94	31,708.10	35,892
Dried Processed Food	10,404.74	12,480.21	14,770.69	17,211.26	20,010.81	23,077
Frozen Processed Food	918.17	1,107.40	1,345.52	1,692.88	2,084.08	2,585
Ice Cream	858.69	968.42	1,095.98	1,302.46	1,554.92	1,770
Meal Replacement	283.40	319.00	360.30	410.40	493.00	577
Noodles	10,188.13	12,210.21	14,433.08	16,792.17	19,487.43	22,428
Oils and Fats	11,753.47	13,594.16	15,665.32	18,485.78	21,640.51	24,323
Pasta	28.87	38.02	47.22	60.53	75.37	90
Ready Meals	241.87	300.81	373.85	457.93	548.83	647
Sauces, Dressings and Condiments	8,126.47	9,564.48	10,951.90	12,754.74	14,788.56	16,774
Spreads	88.68	100.93	114.55	129.40	145.12	157
Sweet and Savoury Snacks	3,396.83	3,924.80	4,499.30	5,290.72	6,316.85	7,320
Impulse and Indulgence Products	14,079.31	16,210.36	18,592.83	21,981.08	25,414.35	28,617
Nutrition/Staples	49,985.82	60,031.41	72,964.83	87,406.10	101,243.21	115,004
Meal Solutions	10,695.18	12,769.50	14,923.83	17,726.98	20,827.48	24,073
Packaged Food	74,541.74	88,737.72	106,140.08	126,694.41	146,980.12	167,098

Source: Euromonitor

### **Baby Food**

The baby food market in Vietnam has weathered the economic downturn fairly well, compared to other processed food sectors. Typically, Vietnamese parents, especially those living in urban areas, are willing to pay for more expensive food products for their young children. Consumers pay more attention to branded products and their origin because counterfeiting in baby food continues in Vietnam, especially in milk formula products. In urban areas, international, imported brands are more preferred thanks to greater ability to afford imported products.

The baby food market in Vietnam is expected to continue to have strong, double digit growth in 2014. Vietnam Dairy Products JSC (Vinamilk) continues to hold the lead in the baby food market, accounting for about 27% market share of value sales in 2013. Abbott Vietnam Co. Ltd. and Friesland Campina Vietnam Co. Ltd. take up the second and third largest shares in the category.

**Table 12: Sales of Baby Food (2008-2013)**

*Unit: VND billion*

Year	2008	2009	2010	2011	2012	2013
Dried Baby Food	1,275.1	1,517.3	1,790.4	2,097.5	2,415.2	2,758.2
Milk Formula	7,791.9	10,115.0	12,624.9	15,017.2	16,498.3	19,132.5
Standard Milk Formula	724.4	945.2	1,188.4	1,490.3	1,748.6	2,011.7
Follow-on Milk Formula	1,385.0	1,821.8	2,300.9	2,776.7	3,107.5	3,599.8
Toddler Milk Formula	5,682.5	7,348.0	9,135.6	10,750.2	11,642.1	13,521.0
Prepared Baby Food	50.5	58.1	66.5	77.8	93.4	106.7
Other Baby Food	2.2	2.6	3.0	3.7	4.5	5.1
<b>Total Baby Food</b>	<b>9,119.6</b>	<b>11,693.0</b>	<b>14,484.8</b>	<b>17,196.2</b>	<b>19,011.4</b>	<b>22,002.5</b>

*Exchange rate: \$1 to VND 21,300 as of 2013*

*Source: Euromonitor International*

### **Bakery, Canned Food and Confectionery products**

Sales of bakery products have also increased in recent years. Sales volume in 2013 increased 6.1 percent over the previous year. Vietnamese consumers continue to change their diets and consume more bread, cakes, and cookies. Sales of canned and preserved food have been increasingly in recent years. Sales volume in 2013 increased 6.8 percent over the previous year. In 2013, Vietnam's confectionery market grew at a slower pace given its nature of being a discretionary item in the context of slowing purchasing power.

**Table 13: Sales Volume of Bakery, Canned/Preserved and Confectionery Products**

*Unit: Metric tons*

	2008	2009	2010	2011	2012	2013

	2008	2009	2010	2011	2012	2013
Bakery products	377,970	406,770	440,390	474,340	510,440	546,470
Canned/Preserved Food	13,380.44	14,058.79	15,261.17	16,126.62	17,610.51	18,800.01
Confectionery	148.82	153.74	158.67	163.74	168.94	177.39

### **Milk and Cream**

Condensed/evaporated milk, which accounts for the largest share of milk and cream products, is one of the most common processed food products in Vietnam, extensively consumed by people from different age groups, different financial backgrounds, and different social classes. This product can be used for various purposes, including in Vietnam's iced coffee drinks. Condensed/evaporated milk grew nearly 9% in value terms in 2013.

Cream is still unfamiliar to many Vietnamese consumers. Different from condensed / evaporated milk, cream's target consumers are the expat community in Vietnam as well as the middle- and high-income classes that have been exposed to Western culture and lifestyle. Within cream, chilled/fresh double cream is the most popular type and is mostly consumed by expats and is typically used to make Western desserts or to bake cakes.

**Table 16: Sales Value of Milk and Cream (2008-2013)**

*Unit: VND billion*

Year	2008	2009	2010	2011	2012	2013
Coffee Whiteners	76.7	80.8	84.5	88.7	97.5	105.1
Condensed Milk	2,721	3,020	3,508	4,280	4,548	4,941
Cream	2.6	2.9	3.2	3.8	4.5	5.1
<b>Total</b>	<b>2,800.1</b>	<b>3,103.7</b>	<b>3,596.1</b>	<b>4,372.1</b>	<b>4,650.2</b>	<b>5,051.3</b>

*Exchange rate: \$1 to VND 21,300 as in 2013*

*Source: Euromonitor International*

### **Drinking Milk Products**

Drinking milk products are expected to continue impressive growth despite the economic downturn. One of the main reasons for this healthy growth is the increasing demand from consumers residing in urban areas. Drinking milk products are much diversified in terms of size and price; thus, they meet different consumer's needs, which contribute to the rising demand. The Vietnamese government has launched a number of initiatives focused on raising Vietnamese citizens' average height, and dairy products play an important role in those initiatives.

Leading players: Vinamilk, FrieslandCampina Vietnam Co. Ltd., and Nestlé Vietnam Ltd. together occupy 46-48 percent market share of the drinking milk product market.

The TH Food Chain JSC is a fairly new company which has achieved strong growth the last couple of years. Within less than two years, the company's products have developed a strong following among Vietnamese consumers. Nestlé Vietnam Ltd. and Mead Johnson Nutrition Co. Ltd. are expected to be the leaders in malt-based hot drinks and powder milk products, respectively.

**Table 17: Sales Value of Drinking Milk Products by Category 2008-2013**

*Unit: VND billion*

Year	2008	2009	2010	2011	2012	2013
Flavored Milk	1,240.5	1,512.9	2,262.7	2,911.8	3,541.2	4,085.8

Drinks						
Flavored Powder Drinks	730.1	842.6	981.6	1,153.4	1,409.7	1,626.1
Flavored Powder Drinks Milk	4,769.3	5,776.8	8,008.9	10,329.5	12,582.8	14,369.6
Powder Milk	810.0	939.0	1,091.4	1,278.4	1,566.0	1,837.6
<b>Total</b>						

Exchange rate: \$1 to VND 21,300 as in 2013

Source: Euromonitor International

### Cheese

Cheese is becoming more popular in the country, mainly thanks to the increasing influence of Western cuisine. Sales of Cheese are still rather low due to the following reasons: (1) the average unit price of cheese is perceived as quite high to most Vietnamese; and (2) cheese is not commonly used in Vietnamese cuisine. However, the potential growth is strong, as indicated by the 15% growth in the size of the market in 2013.

Spreadable, processed cheese holds the largest market share and is also growing the fastest. Soft cheese is expected to record strong growth, mainly due to the further expansion of food service chains, especially Pizza But and Domino's. In Vietnam, reconstituted cheese is the main type of spreadable, processed cheese, accounting for 97% of the market in 2013. Slices are more popular than sticks in terms of format.

Bel Vietnam Ltd. is currently the leading cheese manufacturer in the Vietnamese market, with 70% value share. Its main brands are La Vache Qui Rit, Party Cube, and Babybel. Groupe Lactalis ranks second, mainly due to the popular imported brand Président.

As international and mostly imported brands dominate the cheese market in the country, the only notable domestic player is Vinamilk.

**Table 18: Sales Value of Cheese by Category 2008-2013**

Unit: VND billion

Year	2008	2009	2010	2011	2012	2013
Processed Cheese	487.6	566.1	651.7	780.2	936.1	1,073.0
<i>Spreadable</i>	356.5	415.3	477.6	570.7	684.7	786.6
<i>Un-spreadable</i>	131.1	150.8	174.2	209.5	251.4	286.3
Unprocessed Cheese	5.2	5.9	6.8	8.1	9.8	10.9
<i>Hard Cheese</i>	1.5	1.7	1.9	2.3	2.8	3.0

<i>Soft Cheese</i>	3.7	4.2	4.9	5.8	7.0	8.0
<b>Total Cheese</b>	<b>492.8</b>	<b>572.0</b>	<b>658.5</b>	<b>788.4</b>	<b>945.9</b>	<b>1,083.9</b>

Exchange rate: \$1 to VND 21,300 as in 2013

Source: Euromonitor International

### **Ice Cream**

Demand for ice cream in Vietnam continues to increase gradually. More consumers, especially young people, perceive ice cream as a dessert or snack. More ice cream stores have opened in the last 5 years than in any period in the past. Ice cream products are diversifying with greater variety in terms of flavor, size, and serving styles.

Kinh Do is the leading domestic ice cream maker, accounting for about 31-33% market share. Vinamilk follows in second place. Competition is becoming much tougher thanks to the popularity of famous international brands, such as Häagen-Dazs, Baskin Robbins, New Zealand Natural, and Swensen's. Most of this ice cream is imported as a finished product.

**Table 19: Sales Value of Ice Cream by Category 2008-2013**

Unit: VND billion

<b>Year</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Impulse Ice Cream	698.3	784.5	884.5	1,041.9	1,246.3	1,414.0
<i>Single Portion Dairy</i>	398.1	467.8	552.0	684.4	855.5	991.6
<i>Single Portion Water</i>	300.2	316.7	332.5	357.5	390.8	422.4
Take-Home Ice Cream	160.4	184.0	211.5	260.6	308.6	356.2
<i>Take-Home Dairy Ice</i>	160.4	184.0	211.5	260.6	308.6	356.2
<i>Bulk Dairy Ice Cream</i>	135.4	155.7	179.9	222.1	263.2	304.6
<i>Multi-Pack Dairy Ice</i>	25.0	28.2	31.6	38.4	45.3	51.6
<b>Ice Cream Total</b>	<b>858.7</b>	<b>968.4</b>	<b>1,096.0</b>	<b>1,302.5</b>	<b>1,554.9</b>	<b>1,770.2</b>

Exchange rate: \$1 to VND 21,300 as in 2013

Source: Euromonitor International

### **Yogurt Products**

Increasing consumer awareness of health benefits as well as the marketing efforts of manufacturers has stimulated the demand for yogurt in recent years. Convenience, increasing concerns about hygiene and food safety, have spurred packaged yogurt demand.

Vinamilk dominates in the yogurt market, accounting for 71 percent of overall market share in 2013, and an astounding 91 percent in the spoonable yogurt sub-market. Friesland Campina Vietnam Ltd. is the market leader in the drinking yogurt sub-market, accounting for 53 percent share in 2013. Yakult Vietnam Co. Ltd. has managed to consistently increase its market share and ranked third in 2013 with 9 percent share in drinking yogurt sub-market.

**Table 20: Sales Value of Yogurt and Sour Milk Products by Category 2008-2013**

Unit: VND billion

<b>Year</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Drinking Yogurt	766.7	904.5	1,139.4	1,449.4	1,768.4	1,935.0
Spoonable Yogurt	1,484.1	2,150.9	2,800.0	3,499	4,200.0	4,702.0
<i>Flavored Spoonable</i>	16.2	16.4	18.0	18.6	20.1	21.2
<i>Fruited Spoonable</i>	155.2	225.9	297.4	393.9	495.2	567.1

<i>Plain Spoonable</i>	<i>1,312.8</i>	<i>1,908.7</i>	<i>2,484.6</i>	<i>3,087.5</i>	<i>3,684.7</i>	<i>4,113.7</i>
<b>Yogurt Total</b>	<b>2,250.8</b>	<b>3,055.4</b>	<b>3,939.4</b>	<b>4,949.4</b>	<b>5,968.4</b>	<b>6,636.9</b>

*Exchange rate: \$1 to VND 21,300 as in 2013*

*Source: Euromonitor International*

### **Soft Drinks**

Soft drinks continued to enjoy strong performance in 2013 with double-digit, off-trade growth in current value terms. Increasing consumer demand, efforts by manufacturers in promoting soft drink brands through continuous new product development, and marketing campaigns were the main factors fostering the healthy growth of soft drinks in Vietnam. In 2013, international brands continued to lead soft drink sector, with four of the top five companies being multinationals. PepsiCo Vietnam (PIVN), URC Vietnam Co. Ltd., Coca-Cola Beverages Vietnam Co. Ltd. and La Vie Joint Venture Co, account for 49 percent off-trade market share.

Within overall soft drinks, sports and energy drinks and ready-to-drink (RTD) tea are likely to be among the categories that will enjoy the fastest growth as the result of marketing efforts by manufacturers.

**Table 21: Off-trade vs On-trade Sales Volume of Soft Drinks by Category 2013**

Unit: Million liters	Off-trade	On-trade	TOTAL
Bottled Water	308.3	463.4	771.7
Carbonates	449.7	277.1	726.8
Concentrates	0.2	-	0.2
Juice	152.5	18.1	170.6
RTD Coffee	1.8	0.4	2.2
RTD Tea	818.2	387.7	1,205.9
Sports and Energy Drinks	323.5	72.7	396.2
Asian Specialty Drinks	2.5	15.5	18.0
<b>Total Soft Drinks</b>	<b>2,056.6</b>	<b>1,234.9</b>	<b>3,291.6</b>

*Source: Euromonitor; Note: Excludes powder concentrates*

**Table 22: Off-trade vs On-trade Sales Volume of Soft Drinks by Category 2013**

Unit: VND billion	Off-trade	On-trade	TOTAL
Bottled Water	1,854.4	4,979.6	6,834.0
Carbonates	7,954.4	6,458.8	14,413.2
Concentrates	186.6	-	186.6
Juice	3,547.8	761.1	4,308.9
RTD Coffee	72.4	14.7	87.1

Unit: VND billion	Off-trade	On-trade	TOTAL
RTD Tea	12,613.6	11,653.6	24,267.2
Sports and Energy Drinks	7,264.2	1,843.0	9,107.2
Asian Specialty Drinks	82.0	933.2	1,015.2
<b>Total Soft Drinks</b>	<b>33,575.3</b>	<b>26,643.9</b>	<b>60,219.3</b>

Source: Euromonitor

Recently, the Ministry of Finance decided to not add carbonated soft drinks to the list of items subject to a special consumption tax. The imposition of the special consumption tax would have stifled growth in this sector.

### **SECTION III. COMPETITION**

The biggest competitors for U.S. food processing ingredients are China, other ASEAN countries, Australia, and, for select products, the local food industry. U.S. exporters should understand that Vietnam's diverse food ingredient production already offers many products at competitive prices. Leading multinational food processors have established food processing operations in Vietnam, and also are able to offer a range of western-style products at reasonable prices.

Most products from China and other ASEAN countries also enjoy lower tariffs than U.S. products. While many food processors and consumers are aware of quality differences and are very keen on achieving international standards, most will sacrifice quality for affordable production cost and prices.

In addition to the freight cost advantages from ASEAN countries the fact that most of the suppliers from these countries are more responsive and flexible to importer's demands for smaller shipment sizes, mixed product shipments, or product specification modifications to meet Vietnamese regulations greatly increases the competitiveness of ASEAN products in the Vietnam market.

However, there are opportunities for U.S. ingredients in niche Vietnamese markets which provide value to both U.S. exporters and Vietnamese consumer oriented food processors. With the prospects of the Trans-Pacific Partnership Agreement lowering tariffs on food and agricultural products, the competitiveness of U.S. products will greatly improve. Lower tariffs in itself will not generate sales, education, training, and marketing should also be a priority for U.S. exporters interested in increasing their sales to Vietnam.

**Table 25: Competition in Major Product Categories**

Product Category	Vietnam's Net imports CY2013		Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
	(In \$ million)	U.S. share			
Fish and seafood products	3,629	1%	India Australia Ecuador Japan Taiwan	Large volume of good quality shrimp imported from Japan; Many high quality	Local production is large however increasing domestic market and export markets require

			China	seafood products such as tuna, grouper, and salmon imported from Australia for increasing domestic consumption.  Short transportation time from India, Australia, Japan, Taiwan and China to Vietnam compared to the U.S.	more materials for production.
Total Meat and Poultry products	2,911	3.4%	India Hong Kong United States Australia South Korea Brazil China	Very competitively priced, good quality of imported products from other suppliers	Local production is large, however it is not as competitive on the higher quality end.
Tree Nuts	1,239	19%	United States Hong Kong Cote d'Ivoire Nigeria Iran Ghana	Availability of imported tree nuts for local production and exports;	Excluding cashew production, Vietnam is not a major producer of tree nuts
Dairy products	1,099	21%	United States New Zealand EU Australia	New Zealand, Australia and EU are competitive suppliers of milk powder. Australia is a competitive supplier of fresh milk products. EU is a prominent supplier of cheese products. U.S. dairy products are consistent in good quality.	Local production is inadequate.  Many local dairy processors rely on imports of ingredients.
Fresh Vegetables and Fruits	1,081	5.6%	China Thailand Australia Hong Kong New Zealand South Africa United States	China fresh fruit are low priced, and are traded though the land border, usually avoiding customs formalities.  Fresh fruit from Thailand, Australia, New Zealand and South Africa and United States have a wide range of varieties which meet market	Local production of tropical fruits is large. Most imported fruit are temperate climate fruit

				demands.	
Processed Fruit and Vegetables	711	4.7%	China Thailand Hong Kong	Low cost of imported products from China;  Good quality and safety of imported products from Thailand and Hong Kong.	More and more availability of processed fruit and vegetable products
Soybeans	704	45%	United States Brazil Argentina	Brazil is major competitive supplier of soybeans with competitive prices.  U.S. soybeans are consistent in good quality.	Local production is inadequate.  Local food processors have been using imported soybeans and soy flour.
Vegetable Oils including soy oils	618	1.4%	Malaysia Indonesia Thailand Argentina China	Malaysia, Indonesia and Thailand enjoy ASEAN import tariff for vegetable oils	Local production of raw materials is inadequate. Vietnam's Vegetable oil industry realizes much on imported raw materials
Wheat	614	5.3%	Australia Canada India Ukraine Romania	Good quality, short transportation time of imported wheat from Australia	No local production of wheat vs increasing demand of local bakery industry in Vietnam
Sugar/Sweetener/Beverage Bases	179	6.6%	Thailand China South Korea Indonesia	Low cost of imported material (sugar) from Thailand, China	High cost of locally produced products in Vietnam
Snack Foods (excluding nuts)	141	4.3%	Indonesia Malaysia Thailand Singapore Philippines	Indonesia, Malaysia, Thailand, Singapore, and Philippines are in the region.  Transportation time is short. Tastes of snack foods are suitable for Asian people.	Big local production in Vietnam, good tastes, good marketing campaigns from local producers
Milling Products, wheat flour, potato flour, starch	67	2%	China Germany Japan Hong Kong Belgium United States	Good quality of imported products for confectionary industry	Negligible local production
Pulses	44	4.3%	China Australia Thailand India	Availability of imported pulses from other countries for snack industry in	Negligible local production of pulses.

				Vietnam. Low cost of imported products from China.	
Fruit and Vegetable Juices	9.8	11%	Brazil China United States Malaysia Thailand		

Source: GTIS

**Table 26: Value of selected categories of imported food products and food ingredients**

Unit: \$ Million	2009	2010	2011	2012	2013 est.
<b>Raw and primary products, of which</b>	<b>16,340.8</b>	<b>19,962.6</b>	<b>27,620.0</b>	<b>26,898.8</b>	n/a
<i>Food, foodstuff and live animals</i>	4,631.2	6,225.1	7,379.8	7,669.1	n/a
<i>Dairy products</i>	515.8	708.3	859.1	1,016	1,099
<i>Beverage and tobacco</i>	341.6	292.9	318.5	321.1	n/a
<i>Vegetable oils, fat</i>	492.5	698.1	955.8	747.7	692.2
<i>Wheat flour</i>	8.2	12.8	10.9	10.7	n/a
<i>Wheat</i>	345.7	569.7	814.2	769.9	614
<i>Wheat flour</i>	8.2	12.8	10.9	10.7	n/a
<i>Vegetables and fruits</i>	285	294	294	335	404
<i>Sea food products</i>	280	334	554	647	698

Source: General Statistics Office (GSO), Ministry of Planning and Investment (MPI)

#### **SECTION IV. BEST PRODUCT PROSPECTS**

##### **A. Products present in the market which have good sales potential**

Of U.S. products that are already present in the Vietnam market, soybeans and dairy products continue to have strong sales prospects. Other major U.S. sales items are soy flour, poultry meat and products, fresh fruit, prepared food, processed fruit, and fish products (See Table 27).

**Table 27: Top U.S. food ingredient exports to Vietnam**

Unit: Thousands of US dollars

Product	2011	2012	2013	Jan - Oct 2013	Jan - Oct 2014
<b>Soybeans</b>	<b>122,898</b>	<b>333,204</b>	<b>318,239</b>	<b>219,570</b>	<b>200,850</b>
1201900095 - SOYBEAN,OTHER	0	0	316,686	218,016	196,269
1201900005 - SOYBEAN,OIL STOK	0	0	1,554	1,554	4,582
1201000040 - SOYBEANS,EX SEED	122,898	0	0	0	0
1201900000 - SOYBEANS,EX SEED	0	332,853	0	0	0
<b>Other Bulk Commodities</b>	<b>0</b>	<b>44</b>	<b>47</b>	<b>38</b>	<b>71</b>
1008900140 - CEREALS, NESOI	0	44	47	38	71
<b>Dairy Products</b>	<b>187,509</b>	<b>139,684</b>	<b>240,733</b>	<b>189,066</b>	<b>236,425</b>
0402100000 - NFDM,<1.5% FAT	142,960	74,614	135,575	100,033	124,326
0402990000 - MLK&CRM,CNTD SWT	1,170	1,854	38,159	36,286	3,726
0404104000 - WHEY, DRIED	13,725	12,065	10,110	7,740	10,913
0404100500 - WHEY PROT CONC	4,031	8,399	7,675	5,936	2,966
0404100850 - MOD WHEY NESOI	1,973	7,041	7,671	5,896	6,163

0405100000 - BUTTER	26	3	6,740	4,297	1,906
1702110000 - LACT,ANH>99%SLD	4,969	4,325	6,230	5,454	5,881
0402290000 - MLK&CRM,>1.5% FT	1,007	2,590	6,207	3,906	5,043
1702190000 - LACT,SLD,NESOI	4,778	10,101	4,821	4,178	8,536
1901903040 - ARTCLS OF MLK/CM	455	6,433	4,619	3,966	6,186
1901100000 - PREP,INF US 4RS	2,244	2,924	3,295	3,238	1,266
0402210000 - NFDM, >1.5% FAT	617	617	2,551	2,198	41,761
1901909500 - FD PR,FL/DARY/ST	1,641	4,221	2,242	2,049	1,576
0404900000 - NAT MK PRO NESOI	1,004	501	1,265	979	2,394
2202901500 - MLK-BASED DRINKS	4,210	1,605	999	608	1,480
2105000010 - ICE CREAM	0	196	526	430	638
3502200000 - ALB/MLK,WHEYPRCN	223	405	458	458	8,209
0401500000 - MLK&CRM,>10% FAT	0	14	325	325	302
9802100000 - FD PRDCTS RELIEF	278	258	288	214	214
0403900000 - BUTTERMILK	0	236	273	273	0
0406100000 - FRESH CHEESE	84	554	208	208	325
0401400000 - MLK&CRM,6-10%FAT	0	0	119	119	0
0406200000 - CHEESE ALL KINDS	276	27	100	100	13
0403100000 - YOGURT	84	101	92	65	69
0406300000 - CHEESE,PROCESSED	0	0	52	52	121
0401200000 - MLK&CRM,<6% FAT	12	0	49	40	200
0402910000 - MLK&CRM,CNTD NSW	246	0	30	0	198
0404102000 - WHEY, FLUID	0	0	25	0	69
1901903020 - MALTED MILK	159	0	19	19	0
0401100000 - MLK&CRM,<1% FAT	1,332	597	7	0	0
0406909550 - CHEESE,INC MIXT	0	3	4	0	74
0405900000 - MLKFTS/OLS,NESOI	0	0	0	0	1,555
0406901000 - CHEESE, CHEDDAR	0	0	0	0	125
0406906500 - CHEESE, COLBY	0	0	0	0	187
<b>Tree Nuts</b>	<b>87,480</b>	<b>162,212</b>	<b>236,732</b>	<b>162,588</b>	<b>151,918</b>
0802310000 - WLNT,FR/DR/IN,SH	11,070	26,540	84,906	49,235	45,895
0802110000 - ALMOND,FR/DR,N/S	28,682	41,191	52,602	41,537	45,547
0802320000 - WALNUT,FR/DR/SHL	0	296	36,466	35,963	11,150
0802901000 - PECANS,F/D,IN SH	30,831	67,966	32,381	15,493	29,247
0802210000 - HZLNT/FLBRT,N/SH	8,140	18,832	18,466	11,700	10,816
0802120000 - ALMDS,FR/DRD/SH	4,340	3,063	5,072	3,292	3,716
0802510000 - PSTCHIO,F/D/N,SH	0	259	2,956	1,795	2,062
0802909202 - NUT,FR,DR,IN SHL	0	2,197	1,976	1,976	427
0801320000 - CASHEW NUT, SHL	105	282	635	589	1,407
2008191040 - CASHEWS,PREP/PRS	80	976	413	413	0
0802520000 - PSTCHIO,F/DR/SHL	0	0	409	409	0
0801310000 - CASHEW NUT, N/S	1,007	462	168	168	71
2008193020 - PISTACHIOS PR/PS	112	0	131	0	164
0813500060 - MIXTURES OF NUTS	0	0	94	0	0
0802901500 - PECANS,FR/DR/SHL	466	0	37	0	559
2008199500 - NUTS/SEEDS,PR/PS	13	0	15	15	5
2008194000 - ALMONDS,PRE/PRS	210	3	6	3	200
0802909602 - NUTS, NESOI, FRE	0	144	0	0	651
<b>Poultry Meat &amp; Prods. (ex. eggs)</b>	<b>104,356</b>	<b>61,726</b>	<b>69,214</b>	<b>54,462</b>	<b>57,626</b>
0207140010 - KKN LG QUART,FZN	62,083	44,871	35,142	28,307	30,575
0207140030 - CHKWINGS&OTH,FZN	3,366	1,679	17,776	13,723	7,316
0207140025 - CHK OTHER LEG,FZ	7,820	5,776	5,742	4,991	5,236
0207140090 - CHK OTHER,FZN	15,428	4,266	4,120	2,055	5,986
0207140045 - CHK,PAWS&FT,FZN	4,562	2,743	4,009	3,343	936

1602320090 - PREP CKN, OTHER	1,306	1,665	1,690	1,376	1,463
0207270030 - TRKY,WING,FZN	20	35	200	200	113
0207270090 - TRKY,OTHER	127	76	162	158	5
0207250000 - TURKEYS, FROZEN	63	52	82	82	43
0207270045 - TRKY,BREAST,FZN	0	64	81	81	61
0207140050 - CHK,OFL,EXLV,FZN	107	176	67	30	672
0207120020 - CHCKNS,YNG,FR/CH	18	3	37	37	0
1602390025 - MLS/PRP,NTCKN/TK	3,868	94	34	34	4,970
0207270050 - TRKY,OFFALS,FZN	0	0	20	20	58
0207120040 - CHCKNS,NES FRZN	119	0	14	14	37
0207130000 - CHCKN CTS FR/CH	0	0	5	3	29
0207270010 - TRKY,LEGSWBO,FZN	0	34	0	0	90
1601000020 - TRKY SASG,FRKS	0	0	0	0	24
<b>Fresh Fruit</b>	<b>36,988</b>	<b>37,850</b>	<b>60,301</b>	<b>36,316</b>	<b>72,451</b>
0808100050 - APPLES FRESH	17,937	16,598	32,617	19,777	42,195
0806100050 - GRAPES FRESH	15,789	17,707	21,052	11,708	13,989
0805100065 - ORANGES NES FR/D	791	880	2,518	1,517	7,315
0809290050 - CHER N/SR FR	0	1,718	1,612	1,612	3,837
0805100020 - TEMPLES, FRESH	551	146	867	582	2,502
0808300050 - PEARS, FRESH	0	158	512	212	72
0808100010 - ORG APPLES FRESH	20	167	444	444	363
0805502050 - LEMONS FR/D	0	5	264	91	1,797
0805100045 - ORG ORANGES FR/D	58	226	166	166	96
0805900100 - CITRS NES FRH/DR	23	57	125	105	0
0806100010 - ORG GRAPES FRESH	75	43	84	63	19
0808300010 - ORG PEARS	0	0	17	17	0
0809210000 - SOUR CHERRY, FR	0	0	10	10	198
0810904500 - FRUITS, FRS, NES	587	98	9	9	37
0809400000 - PLUMS,PRUNE,SL,F	20	0	4	4	10
0809300000 - PEACHES,NCTRNS,F	0	0	0	0	20
<b>Prepared Food</b>	<b>26,301</b>	<b>28,695</b>	<b>41,652</b>	<b>35,982</b>	<b>44,316</b>
2106907090 - OTHER FOOD PREPS	22,231	23,472	30,169	26,352	33,426
2106906592 - OTH CAN FD PREPS	1,679	3,362	6,772	5,866	7,118
2106906580 - CRM/MLK SUB NES	272	141	1,850	1,421	1,237
2106907020 - OTH FD PRPS SUGR	22	77	1,201	969	647
1905909090 - PASTRY NESOI	153	374	582	440	308
2008119000 - PNTS,PR/PS NES	0	0	466	466	3
2106906595 - OTH FRZ FD PREPS	923	628	204	186	254
2008111000 - PEANUT BUTTER	149	169	129	125	182
2106905800 - GELATIN FD PREPS	200	151	122	78	204
1901200005 - MIXES, DOUGHS	0	7	86	19	97
2104100060 - SOUP,BROTH,PREPS	26	31	28	18	20
1901200025 - MIXES, DOUGHS	4	6	25	25	32
1901200015 - MIXES, DOUGHS	621	224	18	18	7
2106906575 - CFFE WHIT,N-DARY	0	6	0	0	768
<b>Soybean Meal</b>	<b>27,227</b>	<b>59,990</b>	<b>201,226</b>	<b>141,370</b>	<b>118,578</b>
1208100000 - SOY FLOUR, MEAL	18,550	15,549	131,329	73,122	114,236
2304000000 - SOYBEAN MEAL	8,677	44,441	69,898	68,247	4,343
<b>Fish Products</b>	<b>38,134</b>	<b>33,458</b>	<b>34,706</b>	<b>27,161</b>	<b>80,533</b>
0307710050 - GEO CLAM L/FR/CH	0	270	3,664	2,902	37,890
0306260000 - CW SHP/PRN FR/CH	0	1,735	3,318	2,434	4,196
0306120000 - LOBSTERS, FROZEN	1,110	1,869	3,025	2,284	4,282
0306110020 - ROCK LOBSTER FZ	169	46	2,733	1,096	3,750
0307910130 - CONCH,L,FR,CH	0	342	2,018	1,151	842

0306220000 - LOBSTERS,FR/CH	165	2,534	1,583	1,151	7,756
0308300000 - JELLYFISH	0	614	1,503	1,503	24
1605580000 - SNAL NSNAL,PR,PR	0	1,094	1,326	849	172
0303510000 - HERRING,FRZ	0	420	1,223	1,223	1,122
0306160003 - CDWT SH/PR<33KG	0	594	1,202	1,078	300
0306144020 - SNOW CRAB FZ	141	634	1,111	1,111	1,507
0308190000 - SEA CUC FZ/DSB	0	62	1,025	1,025	419
0307990100 - MOL NES FZ/DSB	0	1,282	927	741	103
0304790000 - BEGMM FIL NES FZ	0	0	864	864	958
0302310000 - ALBACORE,ETC,F/C	0	0	826	826	687
0304620000 - CATFISH FIL FRZ	0	509	825	825	79
0303896195 - FISH NES FZ	0	1,817	770	245	420
0304890000 - FSH FIL NES FZ	0	385	641	539	85
0304870000 - TUAN EUTH FIL/FZ	0	230	487	487	158
0307490022 - LOLIGO SQUID OPA	3,007	748	481	427	318
0306170003 - SHR/PRN<33KG NES	0	250	357	357	206
0303120032 - PINK SLMN FZ NES	0	190	332	141	856
0306142000 - CRABMEAT FZ	0	919	322	301	121
0306170040 - SH/PR PLD FZ NES	0	79	319	295	17
0307290000 - SCLLPS INC QUEEN	657	244	264	232	257
0303390160 - FLAT FISH NES FZ	0	404	243	243	11
0303410000 - ALBACORE TUNA FZ	181	331	233	233	0
0307790090 - CKL A SHL FZ/DSB	0	184	217	217	261
0302320000 - YL FIN TUNA,FR/C	0	0	188	188	477
1605102025 - SNOW CRABMEAT,PR	379	92	170	170	90
0306170015 - SHP/PR=67-88 NES	0	136	168	0	48
1605590000 - MOL NES,PRE,PRE	0	282	162	162	18
0307190000 - OYSTR FZ/DR/SL/B	0	0	161	161	0
0304590000 - FSH MEAT NES F/C	0	559	147	147	0
0304710000 - COD FILLETS FZ	0	0	144	0	0
0306270000 - SHP/PR FCDSB NES	0	242	137	137	65
1605550000 - OCTO,PREP,PRES	0	0	117	117	0
0303310030 - TURBOT GRN FZ NS	213	903	112	112	377
0303540000 - MACK X F/L/R FZ	0	0	101	101	0
0307490029 - LOLIGO SQUID NES	915	420	99	47	289
0303630000 - COD EX,F,L,R,FRZ	0	0	98	98	268
0303670000 - AK POL FZ EXFLR	0	0	80	80	0
0304999100 - OFSHM ESM NES FZ	0	45	71	71	0
1605610000 - SEA CUC,PRE,PRES	0	0	69	69	70
0303890061 - SABLEFISH FROZEN	0	489	65	65	10
0307590000 - OCTOPUS,FR/DR/ST	29	64	63	63	0
0307490050 - SQUID EXP LOLIGO	1,432	1,015	63	63	137
0303240000 - CATFISH FZ	0	80	60	60	0
0303840000 - SEA BASS FROZEN	0	3	47	38	86
0305610000 - HERRINGS, SALTED	0	20	46	46	0
0307490010 - SQUID FILLETS FZ	3,114	802	44	44	40
0307490024 - LOLIGO SQUID PEA	0	0	43	43	564
0303890052 - MONKFSH,FZ	0	0	40	40	0
1605211025 - SHRMP/PRWN,PR,FZ	0	126	39	31	2,139
0303904095 - FISH LIVERS/ROES	0	0	36	36	25
0304610000 - TILAPIA FIL FRZ	0	26	34	34	96
0303904020 - HERRING ROE, FRZ	0	21	34	34	0
0307790070 - CLAM,NOT GD FZ	0	0	25	25	1,180
1605400500 - CRUSTACEANS NESO	0	0	24	24	0

1604197002 - FISH WHOLE/PIECE	0	0	22	22	0
0303490200 - TUNA NES,FRZ	0	0	21	0	0
0302430000 - SARD X F,L&R F/C	0	97	19	19	0
1605301020 - LOBSTER, IN AIRT	0	0	13	13	0
0306110010 - CARIB SPN LOB FZ	451	0	13	0	24
0305690002 - FISH NESOI	0	0	13	13	0
1605102030 - DUN CRABMEAT PRE	0	55	12	0	123
0304810000 - SAL PAC FIL FZ	0	0	11	9	11
0303190100 - SALMONID FZ NES	0	0	10	0	51
0306190092 - CRUSTCNS,NES,FRZ	0	0	10	0	332
0303310015 - HALIBUT FZ NES	0	0	7	0	123
0306170006 - SHR/PR=33-45 NES	0	584	6	0	198
0302893010 - SABLEFISH FR/CHL	0	53	0	0	382
0303110000 - SCKY SLMN FZ NES	0	192	0	0	314
0303290100 - NIL PRCH SNHD FZ	0	0	0	0	14
0303820000 - RAYS/SKATES FZ	0	116	0	0	50
0303890046 - ATKA MACK, FZ	0	0	0	0	70
0303890055 - BUTTERFISH FRZ	0	0	0	0	55
0304991130 - SURIMI AK POL FZ	0	0	0	0	130
0305320000 - FIL BEGMM D/SLT	0	0	0	0	56
0306144010 - KING CRAB FZ	0	13	0	0	13
0306144030 - DUNGENSS CRAB FZ	0	7	0	0	178
0306144090 - CRABS, FZ NES	97	0	0	0	72
0306170009 - SHP/PR=46-55 NES	0	0	0	0	116
0306170012 - SHP/PR=56-66 NES	0	0	0	0	84
0306170024 - SH/P=133-154 NES	0	0	0	0	90
0306244000 - CRABS NESOI	62	14	0	0	19
0307110040 - OYSTR N SD,L/F/C	0	0	0	0	477
0307410040 - SQUID EXCEPT LOL	0	0	0	0	37
0307710070 - CLAM,NGD L/FR/CH	0	0	0	0	81
0307910190 - MOL NES LIVE/F/C	0	0	0	0	91
1605210500 - SHP/PRN PR N ATC	0	6,127	0	0	1,080
1605630000 - JLYFSH,PREP,PRES	0	0	0	0	3,311
2104100040 - SOUPS/BROTHS/PRE	0	0	0	0	150

Source: BICO report, U.S. Census Bureau Trade Data

## **B. Products not present in significant quantities but which have good sales potential**

Table 28 below shows U.S. products not present in significant quantities but which have good sales. Exports of corn, pulses from U.S. significantly increased at 11,950 percent, and 850 percent in 2013, respectively. Processed vegetables, Non-Alcoholic beverage (ex. Juices), and Chocolate & Cocoa products are also showing strong export growth rates in 2013. Other Intermediate Products, and Sugar, Sweeteners, Beverage Bases listed below also have good sales and potential prospects.

**Table28. U.S. potential food ingredient exports to Vietnam**

Unit: Thousands of US dollars

Product	2011	2012	2013	Jan - Oct 2013	Jan - Oct 2014
<b>Pulses</b>	<b>152</b>	<b>245</b>	<b>1,876</b>	<b>1,135</b>	<b>2,681</b>
0713909002 - LGMNCS VEG DRD	0	0	1,640	924	2,360
0713202000 - CHICKPEAS,GRBNZO	139	205	139	135	15
0713104020 - GREEN PEAS, DRYD	13	40	97	76	306

<b>Beef &amp; Beef Products</b>	<b>192,142</b>	<b>160,707</b>	<b>26,628</b>	<b>24,404</b>	<b>16,531</b>
0202306000 - BFWO/B, CRC,FRZ	84,059	93,276	14,667	13,025	13,419
0202206000 - BFW/B CRC,FRZ	89,338	54,469	8,734	8,327	2,035
0201306000 - BFWO/B NPRSD F/C	5,706	1,241	702	702	173
0202203550 - BF PRSD W/B FRZ	264	920	692	692	131
0202303550 - BF PRSD WO/B FRZ	3,575	4,149	692	665	510
0504000070 - BF INT,FZ,X SSGC	50	61	545	438	0
0206290010 - BOV OFL,FZ,HEART	0	90	238	238	0
0201203550 - BF PRSDW/B FR/CH	0	0	190	190	0
0201303550 - BF PRSD WO/B,F/C	81	44	124	84	10
0206290090 - BOV OFL,FZ,OTHER	310	488	44	44	0
0201206000 - BFW/B NTPRSD F/C	5,961	5,337	0	0	8
0202100010 - CRC,1/2CRC VL FZ	3	0	0	0	0
0202100090 - CARCASSES/HALF-C	12	0	0	0	0
0206210000 - BOV TNGS,ED FRZ	0	11	0	0	29
0210200000 - BF,SLT,BR,DRD,SM	2,778	0	0	0	0
0504000050 - BEEF TRIPE, FZ	4	287	0	0	215
1602509500 - BEEF,PREP,PRES	0	332	0	0	0
<b>Processed Fruit</b>	<b>11,369</b>	<b>14,546</b>	<b>23,780</b>	<b>17,282</b>	<b>15,676</b>
2008997550 - FT/ED,PL/PT,P/PS	4,919	6,325	11,178	9,082	9,257
0813200000 - PRUNES, DRIED	455	2,459	6,218	4,282	2,221
0806200000 - GRAPE DR,RAISINS	4,312	4,959	5,602	3,255	3,106
2008309000 - CTR FR,ETC,PR,PS	1,082	274	433	401	583
0804100000 - DATES,FRSH/DRIED	46	108	118	96	72
0813500020 - MIXTURES DRY FRT	15	26	74	67	147
0811909000 - FRUIT/NUTS,NEC	12	31	45	0	53
0812100000 - CHERRY,INED,PRES	0	0	41	41	0
2008930000 - CRANBERRY PRP/PRS	0	28	38	28	73
0811908060 - CHERRIES,TART,FZ	0	0	0	0	72
0813402010 - DRD WILD BLUEBRY	0	0	0	0	6
0813402020 - DRD CULT BLUEBRY	0	0	0	0	12
0813403010 - CHERRY, TART DRD	10	139	0	0	14
2008600020 - CHRY,MRSNG,PR,PS	10	0	0	0	26
2008600040 - CHERRY,SWT,PR,PS	0	0	0	0	13
<b>Non-Alcoholic Bev. (ex. juices)</b>	<b>2,181</b>	<b>8,650</b>	<b>12,366</b>	<b>11,724</b>	<b>11,958</b>
2202909090 - OTH NONALC BEVRG	140	6,829	9,830	9,806	9,816
2101200020 - INSTANT TEA/MATE	1,011	384	686	525	818
2106906587 - HERBAL TEAS MIX	289	202	543	485	491
2202100040 - OTH CARBNTD S/DR	211	353	369	146	296
0901210050 - COFFEE RST ND	15	18	242	242	61
2101112941 - COF EXT/ESS, RET	303	189	152	0	0
2101120000 - COF BASED EST/ES	0	18	133	133	72
2202100020 - CARB S/DRK SWTNR	157	60	109	93	178
0901902000 - COFFEE SUBSTITUT	0	18	91	91	0
2101112126 - INST COF NDEC RT	0	132	85	85	6
2101112949 - COF EXT/ESS,OTH	0	0	71	64	49
0902300000 - BLACK TEA FERMTD	5	0	53	51	47
0901210010 - ORG COFFE RST ND	0	0	0	0	57
0902200000 - GREEN TEA NESOI	43	428	0	0	0
0902400000 - BLACK TEA NESOI	0	0	0	0	5
2101200040 - TEA/MATE EXTRACT	0	21	0	0	54
<b>Processed Vegetables</b>	<b>3,702</b>	<b>3,463</b>	<b>6,223</b>	<b>4,489</b>	<b>7,293</b>
2004108020 - POTATO,FR FRY,FZ	1,652	1,608	3,009	2,342	3,407
2004908540 - SW CORN,PR/PS,FZ	1,417	1,108	1,158	1,001	469

2005200040 - POTATO GRANULES	27	16	823	118	510
0710400000 - SWEET CORN,FRZ	174	279	634	468	883
1105200000 - FLAKES OF POTATO	111	0	226	226	1,324
2002900060 - TOMATO PASTE	119	114	115	101	92
2004908580 - VEG IN MX P/P FZ	38	94	65	65	33
2004108060 - POTATOES X FF FZ	8	10	54	50	53
2005200070 - POTATO NES,P/PRS	0	28	45	36	26
2001100000 - CUCUMBERS,PR/PS	3	20	29	21	0
2005800000 - SWEET CORN,PR/PS	38	66	23	23	44
2003100100 - MSHRM,AGAR.PR/PS	0	0	19	19	0
2005100000 - VEG HOMO,NT/FRZ	4	24	10	10	0
0712320000 - WOOD EARS, DRIED	0	0	6	6	0
0712204000 - ONIONS, DRIED	0	0	4	0	34
0710100000 - POTATOES FROZEN	0	0	0	0	17
0710800050 - OTHER FROZEN VEG	0	0	0	0	26
0710900000 - VEG MIXTURES	0	0	0	0	13
0712909002 - VEG NES/MX VG DR	0	0	0	0	78
1106100000 - FL/ML,DR LEG VEG	22	38	0	0	0
1108190000 - STARCHES, NESOI	0	3	0	0	0
2002100000 - TOMATO,WHL/PCS P	0	0	0	0	4
2003900002 - MUSHRM TRF PR/PS	0	0	0	0	209
2005512040 - CWPEA,BL-EYE,SPP	0	0	0	0	4
2005590000 - BNS,N/S,PR/PS	0	38	0	0	0
2005700000 - OLIVES PREP/PRES	0	0	0	0	7
2005996550 - VEGS INC MIX P/P	0	0	0	0	50
<b>Chocolate &amp; Cocoa Products</b>	<b>2,775</b>	<b>3,925</b>	<b>5,129</b>	<b>3,913</b>	<b>5,513</b>
1806900093 - FD PREP/COC NRET	1,360	2,543	2,864	2,035	3,224
1806900063 - CONF/COCO-RETAIL	481	635	795	673	616
1806900073 - FD PREP/COC RETL	361	183	686	615	1,214
1806321000 - CH/COC<2KG NFCON	313	417	474	401	293
1806100000 - COCOA PWDR,+ SWT	39	6	97	54	72
1806323550 - CH/COC<25G NFNCN	0	0	69	69	4
1806209000 - COCOA PREP,BULK	6	77	48	40	33
1805000000 - COCOA PWDR,N SWT	17	9	31	27	31
1806310080 - CH/COC<2KG FLNCN	5	0	30	0	8
1806900083 - CONF/COCO-NRETAL	0	0	22	0	0
1806310040 - CH/COC<2KG FLCON	184	55	12	0	6
1803100000 - COCOA PSTE,N DEF	0	0	0	0	13
1806206000 - CNFTNR COAT/PROD	8	0	0	0	0
<b>Snack Foods NESOI</b>	<b>5,826</b>	<b>6,147</b>	<b>4,469</b>	<b>3,535</b>	<b>5,279</b>
2005200020 - POTATO CHIPS,P/P	3,385	3,702	2,471	1,979	1,887
1905310000 - SWT BISCTS,FRZ	947	872	904	832	1,100
1005904049 - POPCORN,EX SEED	772	518	623	400	1,046
1905909030 - CORN CHIPS AND S	206	212	182	157	225
1704100000 - CHEWING GUM, WHE	86	47	84	67	175
2106906585 - CONFECTIONERY	0	9	66	14	4
1704907000 - SGR CONF W/O COC	59	294	55	41	47
1905901041 - FRZ PSTRY	38	6	25	21	18
2008199050 - POPCORN,MICROWAV	109	97	25	6	78
1704903000 - CONFECT.SWEETMTS	0	16	13	8	34
1905901049 - FRZ BREADS	63	239	12	9	10
1905901080 - BRD,OTR BAKED	8	9	7	0	0
1901902500 - BLENDED FD PRDTS	93	126	0	0	656
1905400000 - BRD, W YEAST	46	0	0	0	0

1905901050 - SWT PSTY	14	0	0	0	0
<b>Pork &amp; Pork Products</b>	<b>7,338</b>	<b>4,755</b>	<b>3,427</b>	<b>3,023</b>	<b>2,077</b>
0203294000 - SWN MT, FRZ	3,366	2,434	2,367	2,112	947
1602492000 - SW MT NE BND/CK	147	137	153	92	196
0203292000 - SWN MT,NE,PRC,FZ	2,257	20	152	135	19
1602412000 - HM,CT,BND,CK	0	125	115	115	70
0206410000 - SWN LVR,ED,FZ	23	98	111	111	0
0504000080 - PK INT,FZ,X SSGC	30	0	95	95	434
0206490020 - SWN OFL,FZ,HEART	153	357	81	81	32
0203192000 - SWN MT,PRC,FR,CH	0	158	78	78	0
0206490090 - SWN OFL,FZ,OTHER	785	350	76	76	124
0504000020 - HG GUT,BLAD,STM	0	192	72	14	0
0210120020 - BACON	6	37	62	51	0
0203129000 - HM/SH X PC,FR,CH	112	0	41	41	0
0206300000 - SWN OFL,ED,FR,CH	0	0	11	11	0
0203110000 - SWN CRC,FR,CH	0	247	11	11	0
1602497000 - SWN MT PRP,PR,NE	0	0	3	0	6
0203194000 - SWN MT,FR/CH	0	0	0	0	39
0203210000 - SWN CARC,FZ	11	0	0	0	0
0203221000 - HM,SH,PRC,FZ	282	0	0	0	0
0203229000 - HM/SH,X PRC,FRZ	151	521	0	0	138
0206490030 - SWN OFL,FZ,FEET	0	58	0	0	72
0206490050 - SWN OFL,FZ,RIND	0	21	0	0	0
1602419000 - HM.CT.NE,PRP,PRS	15	0	0	0	0
<b>Fruit &amp; Vegetable Juices</b>	<b>1,249</b>	<b>1,816</b>	<b>2,044</b>	<b>1,622</b>	<b>1,264</b>
2009904000 - MIX FRT JU,UNFRM	1,066	1,114	925	650	809
2106904800 - CONC FORT ORG JC	0	337	750	690	60
2202903700 - JUICE MIXTURES	0	0	136	136	0
2009899000 - JUICE,NES,UNFRM	0	107	76	69	38
2009902000 - MIX OF VEG JUICE	0	6	48	0	191
2009690000 - GRAPE JU, NES	50	50	41	26	26
2009610000 - GRAPE JU, BX<=20	0	0	27	27	14
2202903600 - OT FORT JUC NCON	14	28	17	0	0
2009120000 - OR J N/FZ BX<=20	0	18	13	13	33
2009710000 - APPLE JU, BX<=20	0	0	4	4	0
2009190000 - ORG JU,N/FZ OTH	0	0	4	4	0
2009412000 - PAP JU B<=20 N/C	0	0	4	4	0
2009110020 - FZ OJ <.946	0	0	0	0	3
2009210000 - GRPFRT JU,BX<=20	0	28	0	0	0
2009790000 - APPLE JUICE, NES	0	40	0	0	57
2009809000 - JUICE,NES,UNFRM	45	0	0	0	0
2106905200 - OT JC CONC FORTF	0	16	0	0	0
2106905400 - MIX JC CONC FORT	74	72	0	0	33
<b>Eggs &amp; Products</b>	<b>323</b>	<b>2,229</b>	<b>1,399</b>	<b>1,326</b>	<b>1,166</b>
3502900000 - ALBUMIN & DRVTS	0	2,047	1,263	1,263	968
0408110000 - EGG YOLKS, DRIED	0	69	132	59	185
0408910000 - BRD EGGS N/SHELL	260	53	5	5	0
0407000040 - BRD EGG FR,PR,CK	58	0	0	0	0
0407210000 - CHICKN EGG FRESH	0	61	0	0	0
3502110000 - EGG ALBMN,DRIED	5	0	0	0	0
3502190000 - OT EGG ALBMN X D	0	0	0	0	13
<b>Condiments &amp; Sauces</b>	<b>685</b>	<b>863</b>	<b>1,011</b>	<b>847</b>	<b>1,166</b>
2103909090 - SAUCES AND PREPS	307	276	345	285	485
2103909020 - MAYONNAISE	79	153	212	161	160

2103204050 - TMTO SAUCES NES	29	69	160	140	114
2103300000 - MUSTARD FL/ML PR	102	79	103	89	102
2103909040 - SALAD DRSSG NESO	22	60	65	65	17
2103202000 - TOMATO KETCHUP	69	119	61	50	99
2103909070 - MIXED SEASONINGS	46	38	33	25	128
2209000000 - VINEGAR & SUBS	31	42	31	31	32
2103100000 - SOY SAUCE	0	26	0	0	27
<b>Fresh Vegetables</b>	<b>209</b>	<b>1,259</b>	<b>646</b>	<b>196</b>	<b>119</b>
0701900080 - POTATO XSD NESOI	156	1,104	631	181	109
0701900050 - POT XSD <1201 KG	23	136	15	15	10
<b>Meat Products NESOI</b>	<b>701</b>	<b>444</b>	<b>474</b>	<b>415</b>	<b>147</b>
0504000090 - OTH GUT,BLD&STOM	0	98	471	415	38
0208902500 - FRG LG,FR,CH,FRZ	634	249	0	0	0
1601000090 - OTHER SAUSAGE	54	23	0	0	94
1603009010 - EXTRCT&JUC OF MT	0	0	0	0	16
<b>Other Intermediate Products</b>	<b>38,838</b>	<b>33,400</b>	<b>43,904</b>	<b>37,546</b>	<b>42,842</b>
2106100000 - CONC&TXT PRO SUB	3,163	3,443	6,780	6,169	8,925
3507907000 - OTH THAN PEN G	3,258	1,784	4,316	3,227	3,347
3302100000 - MIXTURES ODORIFE	2,575	3,023	3,143	2,644	2,532
3504001000 - PROTEIN ISOLATES	1,857	1,906	2,354	2,085	1,772
2301100000 - FLR ML&MT OF PL	2,162	2,040	1,680	1,618	460
1302130000 - VEG SAPS/EXT,HOP	4,016	1,012	1,478	1,458	1,400
3505100040 - CN STARCH,X DEX	2,321	1,729	1,438	1,191	1,827
1302390000 - MUCLG-THCKNR,VEG	222	859	1,275	1,209	878
3301901000 - EXTRACT OLEORESIN	216	635	1,033	1,002	795
3301296000 - ESS OIL,X CITRUS	134	377	891	802	1,011
3503005040 - ED GEL&PHOTO GEL	2,076	861	845	845	409
1101000000 - WHEAT FLOUR	162	1,799	843	843	566
1302320000 - MCLGES/THCKNRS	783	955	748	626	266
1302190100 - VEG SAPS-EXTRACT	497	94	495	437	264
1103130020 - CORN GROATS+MEAL	410	164	451	390	80
1109000000 - WHEAT GLUTEN, WH	112	81	262	262	0
2102100000 - YEASTS, ACTIVE	117	94	231	201	190
3505100092 - STARCH,OTHER	59	292	133	133	125
2306900140 - OTHER CAKE&MEAL	0	0	122	122	141
2102200000 - YEASTS, INACTIVE	151	50	82	82	61
3505100020 - DEXTRINS OTHER	146	54	73	48	64
2307000000 - WINE LEES; ARGOL	0	61	63	54	38
3301250020 - ESS OL,SPEARMINT	5	29	49	39	32
1108120000 - CORN STARCH	11	0	48	48	0
3505200000 - GLUS FRM STRCHS	12	39	48	39	8
1104120000 - OATS,ROLD,FLAKED	4	3	34	21	27
1210200020 - HOP CONE PELLETS	77	45	30	30	0
1302120000 - VEG SAP/EX,LICOR	219	83	28	17	134
1302310000 - AGAR-AGAR	0	0	11	11	0
3301120000 - ESS OIL,ORANGE	16	3	9	9	28
1102200000 - CORN FLOUR	0	0	6	6	2,086
3301905000 - CONC ESS OIL FAT	52	54	5	5	0
3301195160 - ESS OIL,CTRS NES	426	323	5	5	9
1103191400 - RICE,GROATS,MEAL	0	0	0	0	82
1103199000 - GROATS,MEAL,NES	0	0	0	0	17
1104299000 - GRN,HLD,PRLD,NES	0	0	0	0	11
1210200040 - HOP CONES GROUND	0	0	0	0	41
1211200020 - GINSENG RT,CULTV	0	0	0	0	3

1521900000 - BEESWAX-INSCT WX	13	0	0	0	12
2303200040 - BEET-PULP NESOI,	647	55	0	0	0
2306410000 - M RPCZ LA GRN/NG	0	0	0	0	201
2306900120 - CORN GERM MEAL	0	0	0	0	94
3301295116 - ESS,OIL,GERANIUM	0	0	0	0	11
<b>Sugar, Sweeteners, Bev. Bases</b>	<b>14,860</b>	<b>24,972</b>	<b>17,466</b>	<b>15,785</b>	<b>8,435</b>
1702905000 - SUG/SYRUP N/FLAV	4,032	6,771	5,930	4,838	3,209
2106906573 - OTH BEVRGE PREPS	613	4,359	5,417	5,247	2,142
1702600050 - FRUCTOSE SYRUP,	8,009	11,605	2,648	2,648	94
1702300040 - GLUCOSE SYRUP	26	467	1,479	1,340	1,561
1702400000 - GLUCOSE & SYRUP	641	646	812	589	364
1702500000 - CHEMICALLY PURE	304	528	425	425	250
1702600060 - FRUCTOSE,S FORM	152	55	288	288	345
0409000055 - NTURL HONEY NESI	853	267	196	196	49
2106906572 - BEVRG PREP SUGAR	5	50	139	101	53
2106906571 - BEVG PREP SWEETN	156	110	64	50	42
1702300020 - GLUC/DEX,SOLID	10	47	45	45	0
1701992040 - CN/BTSG DRAW NR	11	22	11	11	0
1702200000 - MPLE SUGAR/SYRUP	0	0	8	5	32
1701913040 - CN/BT,NT BV,NRET	0	0	3	3	35
1702904500 - SUGARS AND SYRUP	4	0	3	0	251
0409000025 - CMB & NT HNY/RTL	44	46	0	0	0
<b>Vegetable Oils (ex. soybean)</b>	<b>5,511</b>	<b>7,904</b>	<b>8,875</b>	<b>7,205</b>	<b>6,715</b>
1515290040 - CORN OIL,FLY-RFN	917	4,837	4,043	3,133	2,896
2923202000 - EGG PHOSOLIP OTH	932	1,518	1,408	1,317	1,105
1512190020 - SUN.OIL,REFINED	284	645	1,200	879	844
1515908002 - VFO R/NRNCM NESO	6	60	691	600	493
1513190000 - COCO.OIL,REFINED	51	265	596	510	628
1516200000 - VEG OLS HYDR NES	91	172	397	277	310
1517100000 - MRGRNE EX LQD	0	0	202	202	0
2915700100 - ST OF PMTC,STC	293	40	108	68	116
1515210000 - CORN OIL,CRUDE	0	89	90	90	0
1518000000 - ANML/VG FTS&OILS	0	0	64	64	13
1521100000 - VEGETABLE WAXES	185	212	38	38	42
1517903020 - SLD&CKG OL ED MX	0	0	9	3	79
2916151000 - OLC,LNLC ACIDS	0	0	7	7	25
1515290020 - CORN OIL,ONC-RFN	2,656	0	0	0	0
1517903040 - VEG OL FRY/BK FT	0	0	0	0	119
1517903060 - BKG/FRY FT,ED.NE	72	53	0	0	0
1517903080 - ED AN/VG FT&OILS	0	0	0	0	16
1517904085 - ED.AN.VEG.OL NES	19	0	0	0	20
<b>Animal Fats</b>	<b>2,416</b>	<b>239</b>	<b>1,106</b>	<b>1,048</b>	<b>368</b>
0209900000 - POULTRY FAT	0	0	821	821	3
1501900000 - POULTRY FAT RND	0	239	274	216	213
1501200060 - YELLOW GREASE	0	0	7	7	153
<b>Soybean Oil</b>	<b>0</b>	<b>20</b>	<b>26</b>	<b>0</b>	<b>0</b>
1517904035 - SOY OIL HYDRGNTD	0	20	26	0	0

Source: BICO report, U.S. Census Bureau Trade Data

### **C. Products Not Present Because They Face Significant Barriers**

**Fresh Fruits other than four approved products: Apples, Cherry, Grapes, and Pears**

Fresh fruit from the U.S. other than four approved products (Apples, Cherry, Grapes, and Pears) are not eligible to export into Vietnam due to new regulations on List of Plant Quarantine Pests and Pest Risk Analysis (PRA) Procedure. According to those new regulations, all regulated articles subject to PRA before importing into Vietnam must have PRA conducted. The timeline to conduct the PRA is 1-3 years. Demand for other fresh fruit products from the U.S. such as blueberries, plums, avocados, etc. is increasing in the Vietnam market.

**Selected Meat and Poultry Offal used in meat processing**

In July 2010, Vietnam implemented a “temporary ban” on the importation of offal products from all countries, including the United States. Vietnam cited food safety concerns as justification for implementing the ban, but provided no scientific data to the WTO or any trading partner to support this justification. In April 2011, Vietnam’s Ministry of Agriculture and Rural Development partially lifted the ban on imports of pork and poultry hearts, livers and kidneys (what they describe as “red offals”), and later, in May, of these same products derived from cattle. The GOV announced in September 2013 the official removal of restrictions on imported meat and poultry offal. After several months, USDA’s Food Safety and Inspection Service updated the Export Library based on Vietnam’s acceptance of letterhead certificates and now individual U.S. meat and poultry exporters can submit plant registration documents needed to ship all offal products to the GOV. A few U.S. beef and poultry facilities were registered to ship all offal products (including intestine) to Vietnam, but NAFIQAD has recently suspended listing additional U.S. facilities as approved to ship what Vietnam considers “white offal.” U.S. facilities continue to submit registration documents to NAFIQAD and the U.S. Government continues to press for a full resumption of smooth trade in these products. “White offal” products, including stomach and intestines, are a major ingredient in the Vietnamese meat processing sector.

**Restriction on U.S. old beef from animals over 30 months old**

Vietnam remains closed to beef and beef products derived from cattle older than 30 months of age. These products, if allowed entry, could be a valuable and cost-effective input into Vietnam’s meat processing sector.

**SECTION V: POST CONTACT AND FURTHER INFORMATION**

The following reports may be of interests to U.S. exporters interested in the Vietnam market. These, and related reports prepared by FAS Vietnam offices, can be accessed via the FAS home page: [www.usda.fas.gov](http://www.usda.fas.gov) by clicking on “Attaché Reports” and searching by the link below.

**Table 29: Reference reports**

<b>Report Number</b>	<b>Subject</b>
<a href="#">VM4070</a>	MARD Releases new guidance on Pest Risk Analysis Procedure : Circular 36/2014/TT-BNNPTNT dated Oct 31, 2014 on PRA procedure for regulated articles subject to PRA before importing into Vietnam (for plant and plant origin products)
<a href="#">VM4067</a>	MARD’s Revises the List of Plant Quarantine Pests in Vietnam (Circular 35/2014/TT-BNNPTNT dated Oct. 31, 2014)
<a href="#">VM4057</a>	MARD Reissues Quarantine and Pest Risk Analysis Regs., 2014
<a href="#">VM4039</a>	GVN Releases Decree for Fines for Animal Health and Feed Penalties, 2014
<a href="#">VM4038</a>	GVN Releases Decree for Fines for Animal Health and Feed Penalties 2014 relating to

	Food and Agricultural Import Regulations
<a href="#">VM4030</a>	GVN Releases Circular for Fines for Food Safety Violations relating to Food and Agricultural Import Regulations
<a href="#">VM4029</a>	GVN Circular Defines Food Safety Responsibilities among three Ministries 2014
<a href="#">VM4062</a>	Vietnam Coffee Bi-Annual Report – November 2014
<a href="#">VM4028</a>	Vietnam Coffee Annual – May 2014
<a href="#">VM4020</a>	Agriculture Ministry Releases Biotech Feed and Food Approval Regulation relating to Biotechnology - GE plants and animals
<a href="#">VM 4018</a>	Oilseeds and Products Annual 2014
<a href="#">VM4010</a>	Ministry of Health Publishes Declaration of Conformity Process for Food relating to Food and Agricultural Import Regulations and Standards-Certification 2014
<a href="#">VM4006</a>	Vietnam Imposes New Fines for plant health and trade violation relating to Food and Agricultural Import Regulations and Standards, fresh fruits, dried fruits, potato and potato products, snack foods
<a href="#">VM4005</a>	New enforcement of plant quarantine regulations causes uncertainty violation relating to Food and Agricultural Import Regulations and Standards - Certification, fresh fruits, dried fruits, potato and potato products, snack foods
<a href="#">VM4004</a>	Ministry of Industry and Trade’s (MOIT) Food Safety Law Implementing Circular Released, 2013: Circular 28/2013/TT-BCT dated November 6, 2013
<a href="#">VM3073</a>	Vietnam Food Service - Hotel Restaurant 2013
<a href="#">VM3071</a>	Technical Regulation on Microbiological MRLs in Food 2013
<a href="#">VM3062</a>	Food Retail Sector Report 2013
<a href="#">VM3062</a>	Agricultural Biotechnology Annual 2013
<a href="#">VM3057</a>	Ministry of Health Revises Vet Product MRLs in Adopting CODEX MRL for Ractopamine, relating to Food Import Regulations and Standards, Livestock and Products, Poultry and Products, 2013
<a href="#">VM3051</a>	MOIT Imposes Safeguard on Imported Refined Vegetable Oils, 2013
<a href="#">VM3045</a>	Ministry of Finance (MOF) Raises MFN Applied Tariffs on Sweetener Products relating to Trade Policy, Sugar and Beverage products, 2013
<a href="#">VM3032</a>	Food Safety Law and Guiding Decree Released, 2013
<a href="#">VM3030</a>	MOIT Issues Tighter Trans-shipment Regulation relating to Livestock and products, Poultry and Products, Beverage and wine, 2013
<a href="#">VM3007</a>	Vietnam Revises List of Additives Approved for Use in Food, 2013
<a href="#">VM2066</a>	Vietnam Food Service – Hotel Restaurant 2012
<a href="#">VM2072</a>	Vietnam Exporter Guide 2012
<a href="#">VM1054</a>	Vietnam’s Exporter Guide 2011
<a href="#">VM7037</a>	New Goods Labeling Regulations 2007
<a href="#">VM7038</a>	Guideline on Implementation of New Good Label Regulation 2007

Should U.S. exporters of agricultural food and feed products have any further questions, please email: [aghanoi@fas.usda.gov](mailto:aghanoi@fas.usda.gov).