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Food Processing Ingredients

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Report Highlights:

The Vietnamese food and beverage processing sectors continue to expand - registering strong growth over the past 5 years. Vietnam's food manufacturing sector grew at 9.0 percent in 2016 while growth in the beverage sector was at 10.5 percent. This expansion is driven by economic growth and macroeconomic stability, Vietnam's deepening international economic integration, and a rapidly urbanizing, modern, and youthful population, which is shifting its diet to include more processed and packaged food products. As many local and foreign-invested food processors continue to establish

themselves in the Vietnamese market, the prospects for U.S. food ingredient exporters will continue to improve. However, the overall market will remain very competitive, with preference continuing for regional ingredient exporters, such as Thailand, Malaysia, South Korea, and Japan. The Food Ingredients (FI) Vietnam show will be organized on May 16-18, 2018 in Ho Chi Minh City. Please visit the website <https://www.figlobal.com/vietnam/> for further information.

SECTION I – MARKET SUMMARY

Both Vietnam’s food and beverage processing sectors have experienced strong growth over the past 5 years. According to Vietnam’s General Statistics Office (GSO), Vietnam’s food manufacturing sector grew at 9.0 percent in 2016 and 7.8 percent in 2015, up from 4.8 percent growth in 2014 (see Table 1). In the beverage sector, growth rates were 10.5 percent in 2016, 7.4 percent in 2015, and 10 percent in 2014. Growth also continued in the first 9 months of 2017 as compared to 2016, at 6.6 percent in the food manufacturing sector and 5 percent in the beverage manufacturing sector. Local food and beverage processing sector sources estimate that strong growth will continue in the coming years.

Table 1: Production growth rate of food and beverage manufacturing industries

Unit: percent (%)

	2012	2013	2014	2015	2016
Manufacture of food products	107.9	106.0	104.8	107.8	109.0
<i>Manufacture of fishery products</i>	107.9	111.9	112.5	103.0	106.5
<i>Manufacture of dairy products</i>	110.1	104.7	108.7	116.2	111.8
<i>Manufacture of sugar</i>	117.7	113.0	100.9	99.2	91.8
<i>Manufacture of noodles</i>	102.4	106.5	89.9	96.1	102.9
<i>Manufacture of other food products</i>	102.8	93.8	107.3	102.5	102.9
Manufacture of beverage	111.3	109.2	110.0	107.4	110.5
<i>Manufacture of beer</i>	109.7	109.2	110.0	107.4	110.5

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

According to the latest statistics from GSO, the number of food processors in Vietnam in 2015 was 8,820, of which 6,630 were registered food processing enterprises and 2,190 were manufacturing beverages enterprises. In 2015, the number of food and beverage processors in Vietnam grew 5.1 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. There is no official data available for 2016 yet.

Table 2: Number of enterprises manufacturing food and beverage products and relating to food and beverage services

	2011	2012	2013	2014	2015	2016
Total enterprises manufacturing food and beverage products	7,466	7,751	7,893	8,391	8,820	n/a
<i>Number of enterprises manufacturing food products</i>	5,498	5,708	5,820	6,275	6,630	n/a
<i>Number of enterprises manufacturing beverages</i>	1,968	2,043	2,073	2,116	2,190	n/a
Total enterprises relating to accommodation and food service activities	12,855	13,137	13,616	15,010	16,457	n/a
<i>Number of enterprises relating to accommodation services</i>	6,993	7,046	7,228	7,577	7,871	n/a
<i>Number of enterprises relating to food and beverage services activities</i>	5,862	6,091	6,388	7,433	8,586	n/a

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

Table 3 shows local production of some main industrial food products and food ingredients.

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

	2012	2013	2014	2015	2016
Main Industrial Food Products					
Sea salt (thousand tons)	776	718	905	1,062	933
Canned meat (thousand tons)	6	5	4	4	5
Processed seafood products (thousand tons)	1,927	1,891	2,023	2,092	2,786
Canned aquatic products (thousand tons)	97	108	104	1001	101
Frozen aquatic products (thousand tons)	1,372	1,463	1,587	1,666	1,798
Fish sauce (million liters)	306	326	334	340	368
Canned vegetables (thousand tons)	60	62	63	65	69
Canned fruits and nuts (thousand tons)	50	49	48	49	52
Refined vegetable oil (thousand tons)	632	827	863	966	1,114
Fresh milk (million liters)	701	761	847	1,028	1,106
Powdered milk (thousand tons)	81	87	90	99	111
Milled rice (thousand tons)	39,748	41,017	42,165	40,773	38,991
Refined sugar (thousand tons)	1,634	1,860	1,863	1,842	1,654
Roast, ground, and instant coffee (thousand tons)	92	92	91	88	94
Processed tea (thousand tons)	193	188	180	168	164
Sodium Glutamate (thousand tons)	256	252	253	263	278
Liquor (million liters)	331	318	313	310	305
Beer (million liters)	2,979	3,004	3,287	3,526	3,835
Mineral water (million liters)	566	646	764	877	1,058
Pure water (million liters)	1,695	1,942	2,112	2,390	2,760
Main Food Ingredients					
Rice (thousand tons)	43,738	44,039	44,975	45,106	43,610
Corn (thousand tons)	4,974	5,191	5,202	5,287	5,226
Sugar-cane (thousand tons)	19,015	20,129	19,822	18,336	17,171
Cassava (thousand tons)	9,735	9,757	10,210	10,740	10,932
Peanuts (thousand tons)	469	492	453	452	441
Soybeans (thousand tons)	174	168	157	146	148
Sweet Potatoes (thousand tons)	1,427	1,358	1,401	1,336	1,289
Sesame (thousand tons)	30	33	34	46	41
All type fresh vegetables (thousand tons)	13,992	n/a	n/a	15,737	16,045
All type fresh beans, and peas (thousand tons)	180	170	176	170	170
Perennial industrial crop products					
Cashew nuts (thousand tons)	313	276	345	352	304
Green coffee beans (thousand tons)	1,260	1,327	1,408	1,453	1,468
Tea (fresh) (thousand tons)	910	936	982	1,013	1,023
Pepper (thousand tons)	116	125	152	177	193
Coconut (thousand tons)	1,015	1,304	1,374	1,439	1,477
Fruit crop products					
Grapes (thousand tons)	16.3	19.2	23.9	31	33.4
Mango (thousand tons)	665	680.9	679.1	702.9	724.4
Orange, mandarin (thousand tons)	704	706	759	727	800
Longan (thousand tons)	543	544	519	513	504
Litchi, Rambutan (thousand tons)	649	629	696	715	649

Livestock products					
Buffalo meat (thousand tons/live weight)	89	86	86	86	87
Beef (thousand tons/live weight)	294	285	293	300	309
Pork (thousand tons/live weight)	3,160	3,229	3,351	3,492	3,665
Poultry meat (thousand tons/live weight)	729	775	875	908	962
Horse meat (tons/live weight)	1,736	1,493	1,360	1,520	1,235
Sheep, goat meat (tons/live weight)	16,467	17,065	18,057	19,950	21,142
Deer meat (tons/live weight)	116	143	148	190	206
Lamb meat (tons/live weight)	2,211	n/a	2,326	1,887	1,480
Rabbit meat (tons/live weight)	2,471	n/a	2,676	2,938	3,112
Fresh milk (million liters)	382	456	550	723	795
Eggs (million pieces)	7,300	7,755	8,271	8,874	9,446
Honey (thousand tons)	12	13	14	15	17
Fishery products					
Total (thousand tons), of which	5,733	6,020	6,332	6,582	6,804
<i>Fish products</i>	4,343	4,374	4,571	4,725	4,843
<i>Shrimp</i>	630	723	791	797	824
<i>Other fishery products</i>	760	923	971	1,027	1,061
Caught fishery production (thousand tons), of which	2,705	2,804	2,920	3,050	3,163
<i>Caught sea fish production</i>	1,941	1,885	1,970	2,077	2,186
<i>Caught shrimp production</i>	156	163	159	169	175
<i>Other caught fishery production</i>	609	757	791	804	803
Aquaculture fishery production (thousand tons), of which	3,111	3,216	3,413	3,532	3,641
<i>Aquaculture fish production</i>	2,402	2,352	2,459	2,537	2,576
<i>Aquaculture shrimp production</i>	474	561	615	635	663
<i>Aquaculture other fishery production</i>	235	304	339	361	40

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

Tables 4 and 5 show the value of some imported and exported food products and agricultural-based food ingredients, which are related to food and beverage manufacturing sectors.

Table 4: Value of some imported food products and ingredients

Unit: US\$ million

	2012	2013	2014	2015	2016
Raw and primary products, of which	26,899	27,712	30,648	29,368	n/a
<i>Food, foodstuff and live animals</i>	7,669	9,077	10,667	12,043	n/a
<i>Dairy products</i>	1,016	1,105	1,131	911	852
<i>Beverage and tobacco</i>	321	378	383	408	n/a
<i>Vegetable oils, fat</i>	n/a	692	759	681	702
<i>Animal and vegetable oil, fat, and wax</i>	717	669	736	662	672
<i>Wheat flour</i>	10.7	8.4	9	9	n/a
<i>Wheat</i>	769	619	648	600.9	1,005
<i>Soybeans</i>	778	784	873	765	667
<i>Cashew nuts</i>	334	601	650	1,129	1,596
<i>Vegetables and fruits</i>	335	406	522	622	916
<i>Animal feed and feed ingredients</i>	2,455	3,077	3,254	3,390	3,393
<i>Sea food products</i>	647	698	1,063	1,067	1,095
<i>Salt</i>	21	18	21	19	14

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

Table 5: Value of some exported food products and ingredients

Unit: US\$ million

	2012	2013	2014	2015	2016
Raw and primary products, of which					
<i>Fishery products</i>	6,089	6,693	7,825	6,569	7,019
<i>Fresh, processed vegetables and fruits</i>	827	1,073	1,489	1,839	2,402
<i>Cashew nuts</i>	1,470	1,646	1,994	2,398	2,857
<i>Coffee products</i>	3,674	2,717	3,557	2,671	3,358
<i>Tea products</i>	225	229	228	217	223
<i>Pepper</i>	794	890	1,202	1,260	1,421
<i>Rice</i>	3,674	2,923	2,935	2,796	2,192
<i>Cassava and cassava products</i>	1,351	1,102	1,139	1,320	1,000
<i>Shelled ground nuts</i>	6	11	12	11	n/a
<i>Frozen meat and processed meat products</i>	68	53	66	89	n/a
<i>Foodstuff processed from starch and cereals</i>	411	47	545	658	533
<i>Dairy products</i>	123	116	93	95	n/a
<i>Sugar</i>	47	252	118	58	n/a
<i>Vegetable oils and fats</i>	315	252	258	281	n/a
<i>Cinnamon</i>	6	7	79	69	n/a

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

Food and beverage consumption in Vietnam has continued to grow in recent years. According to statistics from GSO, Vietnam's total food and beverage consumption rose 9.3 percent in 2016, 7.2 percent in 2015, and 5.9 percent in 2014. Food consumption in Vietnam grew at 9.1 percent in the first 9 months of 2017, 5.5 percent in 2016 and 8.1 percent in 2015, while beverage consumption grew at 5.9 percent in the first 9 months of 2017, 13.1 percent in 2016 and 6.3 percent in 2015 (see Table 6). The growing and modernizing retail system and changing consumption habits are a promising trend for the retail food industry and could spur domestic food and beverage processing in the future.

Table 6: Consumption growth rate of food and beverage manufacturing industries

Unit: percent

	2012	2013	2014	2015	2016
Food manufacturing industry	120.6	108.7	105.5	108.1	105.5
Beverage manufacturing industry	94.6	112.9	106.4	106.3	113.1
Average consumption index of food and beverage manufacturing industries	107.6	110.8	105.9	107.2	109.3

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

According to GSO data, Vietnam's total retail sales of goods and services at current prices rose 10.5 percent in the first nine months of 2017 over the same period in the previous year. Vietnam's total retail sales of goods and services at current prices rose 10.7 percent in 2016 over the previous year (see Table 7).

Table 7: Food sector sales of goods and services by kind of economic activity

Unit: Billion Vietnamese Dong (VND) (at current prices)

	Retail sales	Accommodation, food and beverage service	Tourism and tourism-related services*	Total
2012	1,740,360	305,651	323,120	2,369,131
2013	1,964,667	315,873	334,664	2,615,204
2014	2,189,448	353,307	373,479	2,916,234

2015	2,403,723.2	399,842	419,638	3,223,203
2016	2,668,413.3	442,241	457,495	3,568,150

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

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

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

With franchising introduced and applied in the Vietnamese market, western-style fast food restaurant chains, bakeries and coffee shops are becoming more prevalent. Although organized modern retail continues to grow, traditional wet markets dominate in both rural and urban settings. Please refer to GAIN report [VM6081](#) for additional information on Vietnam’s Food Retail Sector.

Table 8: Number of traditional “wet” markets, supermarkets and commercial centers

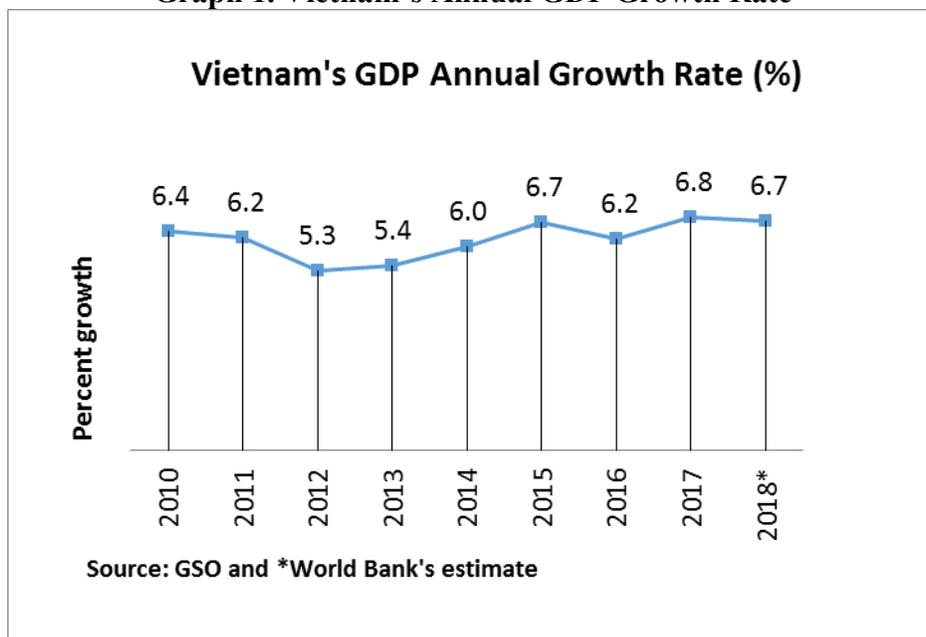
	Number of traditional “wet” markets	Number of supermarkets	Number of commercial centers
2012	8,547	659	115
2013	8,546	724	130
2014	8,568	762	139
2015	8,660	812	162
2016	8,513	869	170

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 over 5 percent annually in recent years with relatively low inflation, ongoing economic reforms, rapid urbanization, and rising disposable incomes.

Vietnam’s gross domestic product (GDP) growth for 2017 is 6.8 percent, according to GSO. GDP growth in 2016 was 6.2 percent, slightly down from 6.7 percent in 2015, but up from 6.0 percent in 2014, 5.4 percent in 2013, and 5.3 percent in 2012 (see Graph 1). Vietnam’s GDP growth is forecasted at 6.7 percent for 2018. This GDP growth rate reflects strengthening domestic demand, strong flows of remittances, and strong manufacturing exports and is expected to continue for the medium term.

Graph 1. Vietnam’s Annual GDP Growth Rate



Foreign direct investment (FDI) has been relatively stable in recent years (\$14.6 billion in the first 9 months of 2017, \$15.2 billion in 2016; \$15.6 billion in 2015, and \$15.6 billion in 2014), and provides higher paying and skilled jobs to larger segments of the Vietnamese population, especially in the outskirts of cities and in rural areas. The rate of urbanization in Vietnam has increased from 27.6 percent in 2006 to 34.5 percent in 2016 with 802 urban areas. The urbanization rate is expected to rise to 35.1 percent in 2017 and to the range of 38-40 percent in 2020, according to GSO. All of these factors have created a dynamic commercial environment in Vietnam.

Additionally, the following factors are influencing food and beverage consumption trends:

1. Vietnam has a large population of 94 million consumers with increasing disposable income, the fastest-growing middle and affluent class in the region as well as young consumers - especially in urban areas - who are receptive to modernizing their lifestyle and incorporating more convenience and processed foods into their diets.
2. Over the past two decades, Vietnam has actively sought economic integration into the international trading system and has negotiated a number of bilateral, regional, and international agreements, either as a member of ASEAN or individually. Currently, Vietnam has FTAs with China, Korea, India, Australia and New Zealand, Japan, Chile, and the Eurasian Economic Union. An FTA negotiated with the EU is expected to go into effect in 2018. These FTAs help boost Vietnam's economic growth, and lower import tariffs for food and food ingredients. In turn, this creates more opportunities for business in the food and beverage sectors.
3. Driven by Vietnam's young population and growth of internet and smart phone penetration, e-commerce in Vietnam has had robust growth over the last five years, especially in the business-to-customer (B2C) segment. According to the Vietnam e-Commerce and IT Agency (VECITA), online purchasing per person per year was about \$170, and revenue from B2C e-commerce in Vietnam in 2016 reached \$5.0 billion, up from \$4.07 billion in 2015. This accounts for 3 percent of the country's gross retail sales of goods. Internet penetration has grown to over 40 percent, driven by increased usage of smart phones. E-commerce has attracted substantial domestic and foreign investments, and is expected to continue to grow in the coming years.
4. Vietnamese consumers are increasingly concerned with food safety and hygiene issues. Rising disposable income is increasing the demand for convenient, packaged food, as well as higher quality, healthy, hygienic, and safe food and food ingredients. Therefore, the demand for safe packaged food and food ingredients is expected to grow.

Table 9 shows advantages/opportunities and challenges in the food and beverage ingredients sector.

Table 9: Advantages/Opportunities and Challenges in the Food and Beverage Industry for U.S. Exports

Advantages/Opportunities	Challenges
Growing economy with low inflation, strong inflows of overseas remittances, and stable FDI.	Uncertainty of government regulations negatively impacts local importers of food and food ingredients.
Growing, young population with increasing disposable	Registration with Government of Vietnam

income, coupled with rapid urbanization and busier lifestyles is leading to eating out more, shopping in supermarkets and hypermarkets, and increased consumption of convenient and processed foods.	(GVN) authorities for new food and food ingredient products, especially functional foods, is very costly and burdensome.
High-end shops, restaurants, and luxury hotels target niche consumer groups and tend to use higher quality imported food and ingredients.	Increased sanitary and phytosanitary (SPS) barriers on animal and plant origin products persist.
More international food and beverage brands are entering Vietnam, increasing consumer awareness of new imported food and beverage products and flavors.	The modern retail sector, although expanding rapidly in urban areas, has not grown as fast in rural areas.
Vietnam has robust e-commerce sales, due to a young population and growth of internet and smart phone penetration.	Large number of small food processors only source their ingredients locally.
Vietnam has an advantageous geographical location with a long coastline, giving it access to the world's major sea trade routes. Continued improvements in trade-related infrastructure, particularly deep-sea ports that can receive Panamax vessels, should help U.S. exports of bulk commodities by reducing ocean freight costs.	U.S. products are at a competitive disadvantage due to the large number of FTAs that Vietnam has negotiated with other trading partners.
Given Vietnam's geographical location advantage and more developed shipping infrastructure, transshipment via cross-border trade of some agricultural products has been increasing recently.	Processed foods still are seen as inferior to fresh foods by many consumers in Vietnam, especially in rural areas.
Increasing interest and demand of organic foods and natural ingredients, especially imported from the United States and other countries.	Strong competition in the food and food ingredients sector from countries which have signed FTAs with Vietnam, due to lower import tariffs.
Vietnamese consumers are increasingly concerned with food safety and hygiene. Rising disposable incomes are causing some consumers to pay more attention to, and pay a premium for, quality.	U.S. food and food ingredients are seen as high priced with high quality, but many Vietnamese consumers and small food processors are not yet ready to accept significant price differences.
Growing popularity of U.S. fast food and restaurant chains supports use of U.S.-sourced food ingredients, such as bakery products, dairy products, meat and poultry.	Strong competition in low-cost food ingredients from China and local producers.
Local food processors are increasing production capacity, food quality, and packaging initiatives, and are developing marketing strategies and new products to meet growing demand of consumers and export markets.	U.S. exporters are often perceived as not flexible or responsive enough to importer's needs.

In some subsectors, locally produced food ingredients cannot meet the demand of processors due to seasonality, especially in the dairy, bakery, and other food processing sectors.	Significantly higher shipping costs and longer transportation time from the United States than from Asia and Oceania.
Private label brands with lower prices keep growing and getting more popular compared with famous brands in the market, leading to increased production in the food and beverage sectors.	Limited infrastructure and distribution for perishable products in Vietnam (such as cold chain).
With franchising introduced and applied in Vietnam market, growing retail networks of western-style fast food restaurant chains, bakeries and coffee shops are modernizing food retail.	Vietnamese authorities have intensified customs measures to control the imports of food, beverage, and many agricultural products through the increased imposition of reference pricing as a base for calculating imports duties on imported poultry, beef, fresh fruits, and other agricultural products. Reference prices are sometimes much higher than sale contract prices.
U.S. food and food ingredients are considered safe and having high and consistent quality.	<u>The GVN promulgated a new regulation on special consumption tax (SCT) calculation reform</u> , impacting imported spirits and wines. This is a critical change in the SCT calculation from the import price to the selling price.
Growing demand for more protein and healthier food products in diets.	

SECTION II – ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

Market research

The best way for U.S. new-to-market exporters to enter the food processing market is to conduct market research to determine if there is a potential market for their products in Vietnam. They can refer to market research reports available from private researchers or analysts. FAS encourages potential U.S. exporters to review related GAIN attaché reports outlined in Section V, Table 27 in this report. In particular, the Exporter Guide report, Food Agricultural Import Regulations and Standards (FAIRS) report, Retail Food Sector report, and Hotel and Restaurant Industry (HRI) Food Service Sector report are highly recommended by the FAS/Vietnam. Additionally, the United States Department of Commerce is another important source of information about the Vietnam market. Its Country Commercial Guide Report for Vietnam is available in at:

<https://www.export.gov/search#/search/?q=vietnam&countries=Vietnam&offset=0&k=x5svuo>.

FAS/Vietnam also highly recommends to new-to-export American suppliers to conduct a site visit. Participation in trade shows may offer good opportunities to understand the market and engage directly with potential importers/distributors or local partners. The Food Ingredients (FI) Vietnam show will be organized on May 16-18, 2018 in Ho Chi Minh City. Please visit the website <https://www.figlobal.com/vietnam/> for further information.

Another tool recommended is joining a trade mission to Vietnam organized by various American agricultural export promotion organizations such as:

1. State Departments of Agriculture
2. State Regional Trade Groups such as:
 - Food Export Association of the Midwest
 - Food Export USA Northeast
 - Western United States Agricultural Trade Association (WUSATA)
 - Southern United States Trade Association (SUSTA)
3. U.S. Cooperators such as:
 - U.S. Dairy Export Council (USDEC)
 - U.S. Soybean Export Council (USSEC)
 - U.S. Grains Council (USGC)
 - U.S. Meat Export Federation (USMEF)
 - Washington Apple Commission (WAC)
 - California Table Grape Commission
 - Pear Bureau Northwest
 - Northwest Cherries
 - Oregon Potato Commission
 - Potatoes USA
 - Raisin Administrative Committee (RAC)
 - Wisconsin Ginseng
 - U.S. Pecan Growers Council
 - U.S. Highbush Blueberry Council
 - USA Poultry and Egg Export Council (USAPEEC)
 - USA Dry Pea & Lentil Council
 - U.S. Dry Bean Council
 - California Wine Institute
 - Popcorn Board
 - California Milk Advisory Board (CMAB)
 - U.S. Wheat Associates

Development of strategic plan

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 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 commercial 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 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 products among food processors or consumers. An exclusive agreement is 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 and key food processors should be a priority. Training courses organized and sponsored by exporters or U.S. commodity export promotion groups 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. FAS/Vietnam 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 divisions. 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 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.

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 to other sources.

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.

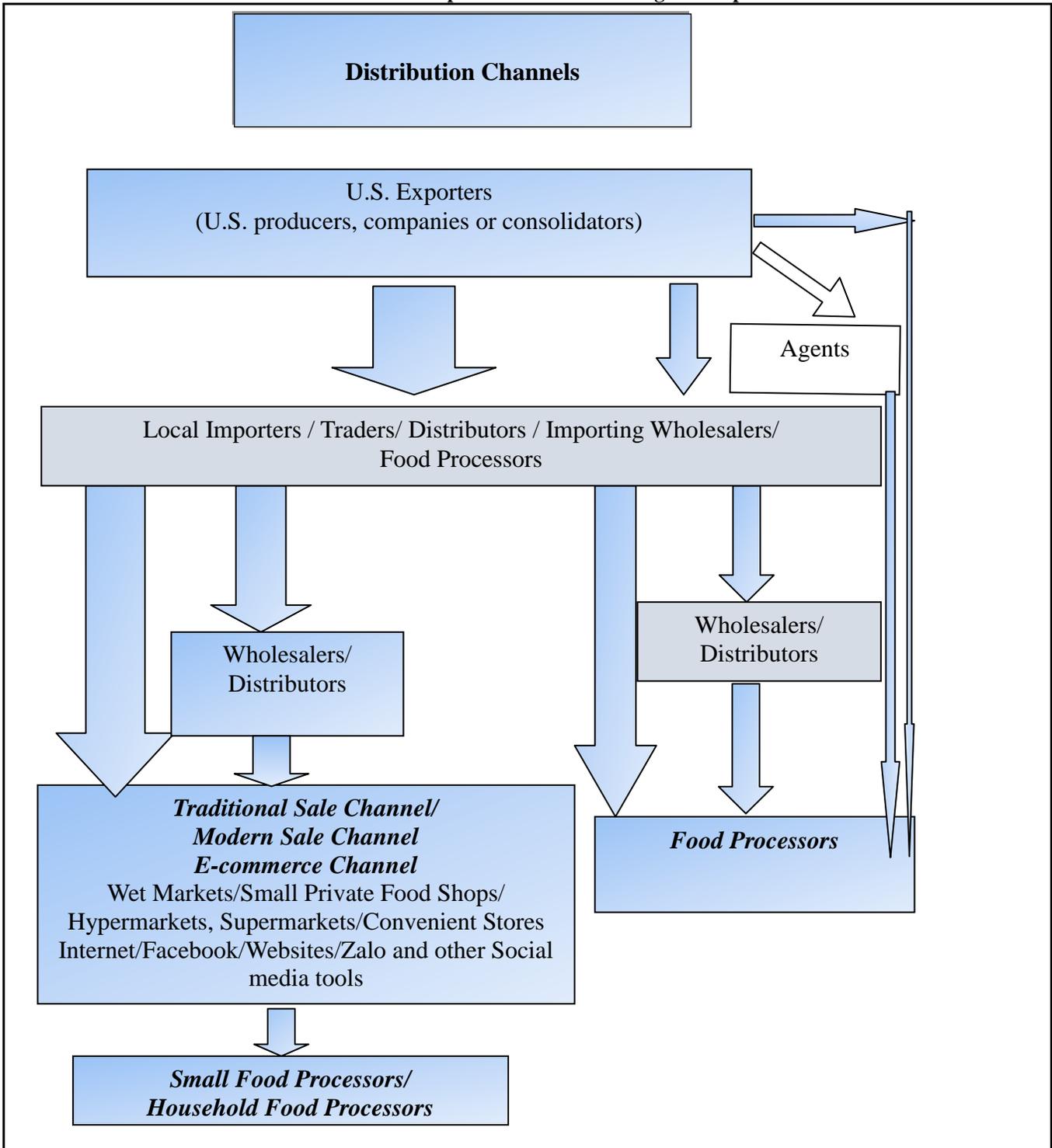
B. MARKET STRUCTURE

Many food processors in Vietnam use both locally produced raw materials and 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 below shows the distribution channels of how products are passed from U.S. exporters to food processors in Vietnam.

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), or e-commerce channel (Internet/Facebook/Websites/Zalo and other Social media tools) → Small Food Processors/Household Food Processors
- 6) Exporters → Agent → Food Processors

Model Numbers 1, 3, and 6 are the most common in Vietnam. Most food importers are also distributors. Vietnam’s limited distribution infrastructure and facilities for perishable food ingredients is also a significant constraint to importing certain 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 10 lists major food processing companies and food ingredient trading companies in Vietnam.

Table 10: Major food processing companies and food ingredient trading companies in Vietnam

Company (Product Types)	Sales (VND or USD) / Year	End-use Channels	Production Location	Procurement Channels
<i>Red Meat and Poultry meat</i>				
VISSAN Limited Company (VISSAN) <i>Website: www.vissan.com.vn</i> <i>Products: Fresh meat (pork, beef); Processed products: + Dry foods: sterilized sausage, canned foods, other sausages</i> <i>+ Frozen foods and cold cuts: cold cuts, spring rolls, roll, lean pork paste....</i> <i>Product Brands: VISSAN, Hola, 3 Bong Mai, Family</i>	Approximately VND 5,630billion (2017) ----- VND 4,580 billion (2016) ----- VND 4,667 billion (2015)	Distributors, retailers, supermarket, hypermarket, and independent small grocers, export.	Food processing and meat processing (pork & beef) enterprise in Ho Chi Minh city ----- Food processing enterprise in Tien Son industrial zone in Bac Ninh province. -----VISSAN’s ranches in Binh Thuan and Binh Duong	Sources from its own farms; Direct importer; Purchases from local producers, or through traders / distributors.

			province.	
Ha Long Canned Food Joint Stock Corporation (JSC) (Halong Canfoco) <u>Website: http://canfoco.com.vn</u> <u>Products: Canned food: pate, luncheon meat, corn beef, stewed pork, stewed beef; Canned fish: tuna in oil, mackerel & sardine in tomato sauce; Canned fruit: lychee in light syrup; Frozen products: spring roll, seafood; Retort sausage; Chilled sausage, hotdog.</u> <u>Product Brands: Halo, Bee Bee, Everyday, Chip bon, Ha Long</u>	VND 432 billion (2016) ----- VND 439 billion (2015) ----- VND 416 billion (2014) ----- VND 485 billion (2013) ----- VND673 billion (2012)	Distributors, retailers (supermarket and hypermarkets food shops, wet markets and small grocers, export, HRI)	Factory in Hai Phong city and Factory in Da Nang city	Direct importer; may purchase through other traders/ distributors
Duc Viet Foods Company <u>Website: http://ducvietfoods.vn</u> <u>Products: 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.</u> <u>Product Brands: Duc Viet</u>	VND 360,686,433,487 (2016) ----- VND 459,806,531,278 (2015)	Distributors, retailers horeca channel, supermarkets, hypermarkets and independent small grocers	Factory in Hung Yen Province; Office in Hanoi	Direct importer; Purchases from local traders and producers.
C.P. Vietnam Corporation <u>Website: http://www.cp.com.vn</u> <u>Products: Smoked sausage, Retort sausage, Fresh chicken meat, Fresh pork meat, Fresh chicken egg, Frozen shrimp, Frozen fish.</u> <u>Product Brands: C.P.</u>	Not available to public	Distributors, retailers horeca channel, supermarkets hypermarket and independent small grocers, Export	Factories in Hanoi. Ho Chi Minh City. Dong Nai Province, Ben Tre Province, Thua Thien Hue Province.	Sources from its own farms
Dabaco Foods Company <u>Website: http://dbcfood.com</u> <u>Products: Smoked sausage, Dixie sausage, Chicky Cheese sausage, Dikka sausage, Lizza sausage, Jambon, Smoked Pork, Sterilized sausage with pork flavor, Sterilized sausage with beef flavor, Stewed meat with beef flavor, Stewed Pork,</u>	VND 202,153,186,083 (2016) ----- VND 250,084,157,740 (2015) ----- VND 140,042,168,85	Distributors, retailers, horeca channels, supermarkets, hypermarkets and independent small grocers	Factory in Bắc Ninh Province; Office in Bắc Ninh & Hanoi	Sources from its own farms. The product is manufactured on 3F (feed-farm-food) chain of the Dabaco Group

<p><i>Stewed Chicken, Minced Pork can, minced Chicken can, minced meat with beef flavor can, Pate.</i></p> <p><i>Product Brand: Dabaco Food</i></p>	<p>0 (2014)</p>			
<p>Ha Long Foods Import Export Co., Ltd.</p> <p><u>Website:</u> <i>http://halongfoods.com.vn/</i></p> <p><u>Products:</u> <i>Imported meat products include: beef & poultry leg quarters, drumsticks, thigh quarters, wings, feet, hearts, gizzard, chicken MDM (Mechanically Deboned Meat)</i></p>	<p>VND 889 billions (2016)</p> <p>-----</p> <p>VND 872 billions (2015)</p> <p>-----</p> <p>VND 692 billions (2014)</p>	<p>Canned food processors, catering services industry, industrial zone supermarkets system and other retail customers</p>	<p>N/A</p>	<p>Direct importer; may purchase through other traders/ Distributors</p>
<p>Fish and seafood products</p>				
<p>Vinh Hoan Corporation</p> <p><u>Website:</u> <i>www.vinhhoan.com</i></p> <p><u>Products:</u> <i>Frozen Pangasius products;</i> <i>Value-added products from pangasius.</i></p> <p><u>By-products:</u> <i>fish oil, fishmeal</i> <i>Fish collagen and gelatin</i></p> <p><u>Product Brands:</u> <i>Mekong Master, Mekong Blue Pride, Mekong Origin, Vinh Foods.</i></p>	<p>Consolidated revenue: VND 3,978 billion (Jan.-Jun. 2017)</p> <p>-----</p> <p>VND 7,370 billion (2016)</p> <p>-----</p> <p>VND 6,528 billion (2015)</p> <p>-----</p> <p>VND 6,300 billion (2014)</p>	<p>Food services, retail and export</p>	<p>Factories in Dong Thap Province & Tien Giang Province of Vietnam</p>	<p>Sources from its own farms and contracted farmers</p>
<p>Sao Ta Foods Joint Stock Company (FIMEX VN)</p> <p><u>Website:</u> <i>www.fimexvn.com</i></p> <p><u>Product:</u> <i>Processed shrimp products; seafood-processed products, other agro-processed products such as sweet potatoes, okra, bell peppers.</i></p> <p><u>Product Brands:</u> <i>Fimex VN</i></p>	<p>VND 2,221 billion (Jan.-Sept. 2017)</p> <p>-----</p> <p>VND 2,256 billion (2016)</p> <p>-----</p> <p>VND 2,889 billion (2015)</p> <p>-----</p> <p>VND 2,900 billion (2014)</p>	<p>Export, distributors</p>	<p>01 shrimp farm, 01 shrimp processing factory, 01 agro processing factory in Soc Trang</p>	<p>Direct importer; Purchases from local producers, or through traders / distributors</p>
<p>Ben Tre Aqua-product Import and Export Joint Stock Company (Aquatex Ben Tre)</p> <p><u>Website:</u> <i>www.aquatexbentre.com</i></p>	<p>VND 287 billion (Jan.-Sept. 2017)</p> <p>-----</p> <p>VND 422</p>	<p>Export, distributors</p>	<p>One factory, one hatchery and four growing farms in Ben Tre province</p>	<p>Purchases from own farms, local producers, or through traders / distributors</p>

<p><i>Products: Frozen and processed Pangasius products; Frozen and processed Clam products</i></p> <p><i>Product Brands: Aquatexbentre</i></p>	<p>billion (2016) ----- VND 474 billion (2015)</p> <p>billion (2014) ----- VND 452 billion (2014)</p>			
<p>An Giang Fisheries Import Export Co (Agifish Co.)</p> <p><i>Website: http://agifish.com.vn</i></p> <p><i>Products: Frozen Fish products, Processed Fish products.</i></p> <p><i>Product Brands: Agifish.</i></p>	<p>Not available to public</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>Special Aquatic Products JSC (SEASPIMEX VIETNAM)</p> <p><i>Website: http://seaspimex.com.vn</i></p> <p><i>Products: Frozen seafood products, Canned Fish products, canned pork products, sausages.</i></p> <p><i>Product Brands: Seaspimex, Thanh Giong.</i></p>	<p>Not available to public</p>	<p>Distributors, retailers supermarkets, hypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Two 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>
<p>Hung Vuong Corporation</p> <p><i>Website: https://www.hungvuongpanga.com.</i></p> <p><i>Products: Frozen Fish products, Processed Fish products.</i></p> <p><i>Product Brands: Hung Vuong Corporation.</i></p>	<p>Sales Revenue: VND16,060 billion (Year 2017 from Oct. 1, 2016 to Sept. 30, 2017) ----- VND18,026 billion (Year 2016 from Oct. 1, 2015 to Sept. 30, 2016) ----- VND12,445 billion (Year 2015 from Jan. 1, 2015 to Sept. 30, 2015) ---- VND15,042 billion (Year 2014 from Jan. 1, 2014 to Dec. 31, 2014)</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Six (06) factories in Tien Giang, Ben Tre, Vinh Long, Dong Thap, An Giang Provinces</p>	<p>Purchases from its own farms, local farmers</p>
<p>Dairy products</p>				

<p>Vietnam Dairy Products JSC (Vinamilk)</p> <p><i>Website: www.vinamilk.com.vn</i></p> <p><i>Products: Liquid milk including UHT and pasteurized milk, powder milk, nutrition powder, infant cereal, condensed milk, cheese, plain yoghurt, fruited yoghurt, UHT drinking yoghurt, probiotic drinking yoghurt.</i></p> <p><i>Product Brands: Vinamilk, Dielac, Ridielac, Sua Ong Tho (Longevity), Ngoi Sao Phuong Nam (Southern Star), Probiotic Yogurt, Flex, Susu, Vinamilk Ozela, Probi, ProBeauty, Aloe Vera (Nha Dam), Kefir, Sure Prevent, CanxiPro, Diecema.</i></p>	<p>Net sales VND 46.8 trillion (2016) --- VND 40.1 trillion (2015) ----- Net profit VND 11.2 trillion (2016) --- VND 9.3 trillion (2015)</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), stores, export, HRI, airplane service</p>	<p>Ten (10) dairy farms in Tuyen Quang, Thanh Hoa, Nghe An, Ha Tinh, Binh Dinh, Lam Dong, and Tay Ninh provinces; Thirteen (13) milk plants in Bac Ninh, Thanh Hoa, Nghe An, Da Nang, Binh Dinh, HCMC, Binh Duong, and Can Tho Provinces; Three (03) international milk processing plants in Cambodia, USA and New Zealand</p>	<p>Direct importer, Purchases from own farms and local producers.</p>
<p>Friesland Campina Vietnam Co. Ltd.</p> <p><i>Website: www.frieslandcampina.com.vn; www.dutchlady.com.vn/</i></p> <p><i>Products: Dairy and baby food products including drinking milk products, powdered milk, whole milk, sweetened condensed milk, milk products such as drinking yoghurt, plain yoghurt.</i></p> <p><i>Product Brands: Dutch Lady, Dutch Lady Gold, Friso, Dutch Lady Complete, Yomost, Fristi, Hoan Hao, Friso, Frisolac, and Frisomum, Dutch Lady Cao Khoe.</i></p>	<p>VND 7,391 billion (2016) ----- VND 7,045 billion (2015) ----- VND 8,551 billion (2014)</p>	<p>Distributors, retailers supermarkets, hypermarkets and independent small grocers across Vietnam)</p>	<p>Two (02) factories in Ha Nam and Binh Duong Provinces; one dairy farm in Ha Nam province</p>	<p>Purchases from local producers</p>
<p>Nestlé Vietnam Ltd.</p> <p><i>Website: www.nestle.com.vn</i></p> <p><i>Products: Nutritional products including milk products.</i></p> <p><i>Product Brands: Nutren Junior, Nutrien Optimum, Peptamen, Nutren Diabetes, Nutren Fibre, Fruity liquid milk Nestlé Bear, , Finesse, Nestle Lactogen Gold, Nestle Nan Optipro 4, Nestle Nan</i></p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarketshypermarkets, convenient stores)</p>	<p>Overseas</p>	<p>Direct importer</p>

<p><i>Optipro HA 3, Pre NAN B, Wyeth S-26 Promise Gold 4, S-26 PROMIL GOLD, S-26 PROGRESS GOLD, NESTLE Mom & Me, Nestlé CERELAC Nutripuffs, Cerelac, Ice Cream products (MILO, Kit Kat, Edy's, Movenpick và Nestlé Super Chocpop); Nestle Coffee Mate, Milky Time, NesQuik, Nestea Matcha, Nestle Carnation</i></p>				
<p>Nutifood Nutrition Food JSC</p> <p><u>Website:</u> www.nutifood.com.vn</p> <p><u>Products:</u> Nutritional products, dairy products (milk and yogurt), baby food, soy milk.</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); Nuti Sua Tuoai 100%; Nuti soy milk.</p>	<p>VND 6,970 billion (Jan.-Sept. 2017)</p> <p>-----</p> <p>VND 7,514 billion (2016)</p> <p>-----</p> <p>VND 6,844 billion (2015)</p>	<p>Distributors, retailers supermarkets, hypermarkets and, convenient stores, independent small grocers across Vietnam, export.</p>	<p>One plant in Binh Duong Province;</p> <p>-One plant in Ha Nam province; One plant in Gia Lai province.</p> <hr/> <p>One dairy farm of 10,000 cows in Gia Lai province</p>	<p>Use fresh milk from its dairy farm;</p> <p>Direct importer; Purchases from local producers, or through traders / distributors</p>
<p>TH Milk JSC</p> <p><u>Website:</u> http://www.thmilk.vn</p> <p><u>Products:</u> UHT Fresh Milk, Pasteurized Fresh Milk, Organic Fresh Milk, UHT Drinking Yogurt, Probiotics Drinking Yogurt, Functional Drinking Yogurt for Teens / Kid, Natural Spoon Yogurt, Probiotics Spoon Yogurt, Functional Spoon Yogurt for Kids, Natural Butter, Natural Cheese, Natural Ice Cream.</p> <p><u>Product brands:</u> TH True MILK, TH True Milk Organic, TH True Yogurt, TH True Yogurt Organic, TH True Yogurt Topteen, TH True Yogurt Topkid, TH True Butter, TH True Cheese, TH True Ice cream.</p>	<p>Not available to public</p>	<p>Exclusive stores (TH true mart), Supermarkets Hypermarkets Convenient Stores, Independent Retailers.</p>	<p>Eight (08) dairy farms in Nghe An Province.</p> <p>----</p> <p>One (01) processing mega factory in Nghe An Province.</p>	<p>Only use fresh milk from TH farms</p>
<p>Dalat Milk JSC</p>	<p>Not available to</p>	<p>Distributor,</p>	<p>One (01) dairy</p>	<p>Uses only fresh</p>

<p><u>Website:</u> http://www.dalatmilk.vn</p> <p><u>Products:</u> Pasteurized Fresh Milk, Drinking Yogurt (Sweetened, oranges, mango, lemon string), Spoon Yogurt (Pure, Sweetened, Alovera, Strawberry, Peach, Matcha). <u>Product brands:</u> Dalat milk Pasteurized Fresh Milk, Dalat milk Drinking Yogurt, Dalat milk Spoon Yogurt.</p>	public	Agents Supermarkets Hypermarkets Convenient Stores, Independent Retailers, Key accounts	farm in Lam Dong Province; One milk processing factory in Lam Dong Province.	milk from Dalat milk farm and buy from farmer in Lam Dong.
<p>Moc Chau Milk JSC</p> <p><u>Website:</u> http://mocchaumilk.com</p> <p><u>Products:</u> Pasteurized milk, UHT milk, Yogurts, Cheese, Butter, Milk Candy, Condensed milk, <u>Product brands:</u> Moc Chau</p>	VND 2,280 billion (2016) ----- VND 2,106 billion (2015) ----- VND 2,016 billion (2014)	Distributors, retailers supermarkets, hypermarkets and independent small grocers across Vietnam	Two (02) milk processing factories; one animal feed mill; dairy farms; one dairy breeding farm in Moc Chau, Son La province	Uses only fresh milk from their own farm and farmer households in Moc Chau, Son La Province
<p>Ba Vi Milk JSC.</p> <p><u>Website:</u> http://bavimilk-jsc.com.vn/</p> <p><u>Products:</u> UHT and Pasteurized Fresh Milk, Pasteurized Fresh Goat Milk, Yogurts, Goat yogurt, Drinking yogurts, Fermented milk drinks, Condensed milk, Condensed milk cakes, Yogurts with sticky rice. <u>Product Brands:</u> Ba Vi</p>	About VND 500 billion (2016)	Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam	One (01) factory in Ba Vi, Hanoi	Purchases from local producers, or traders / distributors.
<p>International Dairy JSC (IDP)</p> <p><u>Website:</u> http://www.idp.vn</p> <p><u>Products:</u> Pasteurized Fresh Milk, UHT Milk, drinking yoghurt, fruited yoghurt, and plain yoghurt, nutritional drinks <u>Product Brands:</u> z'Dozi, Love'in Farm, Kun, Love'in Farm young corn milk, and Love'in Farm Ba Vi (red bean milk), LIF.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), exports.	One (01) factory in Chuong My, Hanoi and one factory in Ba Vi, Hanoi	Direct importer; Purchases from local producers, or traders / distributors
<p>NUTRICARE CO., LTD (Nutricare)</p> <p><u>Website:</u> www.nutricare.com.vn</p> <p><u>Products:</u> Nutritional</p>	Not available to public	<u>Consumer products:</u> Wholesale Distributors, Retailers, Supermarkets, Hypermarkets, Stores, and Groceries	One (01) factory in Thuan Thanh 3 Industrial Zone, Thanh Khuong Ward, Thuan	Direct import, Purchases from trading companies, and local manufacturers.

<p>products, Therapeutic products, Therapeutic food, Powder milk, Dietary supplement.</p> <p><u>Product Brands:</u> Metacare, Care 100 Plus, Care 100 Gold, Nutricare Gold, Glucare Gold, Nutricare Mom, Nutricare Bone, Nutricare Senior, HanieKid, Leanmax, Leanmax Hope, Leanmax Ligos, Leanmax Bone, Leanmax Rena, Nutricare Cerna, Grandcare, MetaMax, Gestcare Mom, Smarta IQ.</p>		<p><u>Therapeutic products:</u> Hospitals, Clinics</p>	<p>Thanh, Bac Ninh province of Vietnam</p>	
<p>Hanoi Milk JSC.</p> <p><u>Website:</u> http://hanoimilk.com.vn</p> <p><u>Products:</u> UHT milk,</p> <p><u>Product Brands:</u> Izzi, Yotti, Hanoi Milk, Yoha.</p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, exports.</p>	<p>One (01) factory in Hanoi</p>	<p>Direct importer; Purchases from local producers, or other traders / distributors</p>
<p>Vita Dairy</p> <p><u>Website:</u> http://vitadairy.com.vn</p> <p><u>Products:</u> Powder Milk, Nutritional Products</p> <p><u>Product Brands:</u> CaloSure, CalosBaby, Calokid, VitaGrow, VitaDairy, CalosVita, Gluvita, GrowMax, GrowMax+, Nepro 1, Nepro 2, Fohepta.</p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam</p>	<p>One (01) factory in Hanoi</p>	<p>Direct importer; Purchases from local producers, or other traders / distributors</p>
<p><i>Prepared fruits, prepared vegetables, oilseed products (i.e. sauces, oils and other frozen, canned and dried products)</i></p>				
<p>Masan Consumer Holdings Company Limited (MCH)</p> <p><u>Website:</u> http://www.masanconsumer.com</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>Net revenue VND 8,791 billion (Jan.-Sept. 2017)</p> <p>-----</p> <p>VND13,790 billion (2016)</p> <p>-----</p> <p>VND13,212 billion (2015)</p> <p>-----</p> <p>VND13,098 billion (2014)</p> <p>-----</p> <p>Net profit after tax VND 1,316</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.</p>	<p>Factory in Phu Quoc, Kien Giang province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>

	billion (Jan.-Sept. 2017) ----- VND2,791 billion (2016) ----- VND2,901 billion (2015) ----- VND3,425 billion (2014)			
Cai Lan Oils & Fats Industries Co Ltd. <i>Website: www.calofic.com.vn</i> <i>Products: Cooking oil products, Shortening, Baking fat, Creaming fat, Ice cream fat, Butter oil substitute, Margarine, Olein, Soybean oil.</i> <i>Product Brands: Neptune, Simply, Olivoilà, Meizan, Cai Lan, Kiddy, Orchid, Satellite.</i>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam) Industrial end users	Factories in Quang Ninh province, and Ho Chi Minh City	Direct import, Purchase from local producers.
Tuong An Vegetable Oil JSC (TAC) <i>Website: www.tuongan.com.vn</i> <i>Products: Cooking Oils, butter, margarine, shortening.</i> <i>Product Brands: 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, Baby Olive Oil</i>	Net sales revenue VND 1,099 billion (Jan.-Sept. 2017) ---- VND3,978 billion (2016) ---- VND3,593 billion (2015) ----- Net profit after tax VND 35 billion (Jan.-Sept. 2017) ---- VND 66.9 billion (2016) ---- VND 69.7 billion (2015)	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	Phu My-Ba Ria Vung Tau province and Vinh-Nghe An province	Direct importer; May purchase from local producers.

<p>Golden Hope Nha Be Edible Oils Co. Ltd.</p> <p><i>Website: www.marvela.vn; www.ghnb.com.vn</i></p> <p><i>Products: Edible Oils, Palm Oil, Soybean Oil, Shortening, Vegetable cooking oils.</i></p> <p><i>Product Brands: MARVELA, Golden Hope-Nha Be, Ong Tao oil, Salad oil, Salata, Delio, Sen, Olein oil, Soybean.</i></p>	Not available to public	Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, export	One (01) factory in HCMC	Direct importer; May purchase from local producers.
<p>Tan Binh Vegetable Oil JSC</p> <p><i>Website: www.nakydaco.com.vn; dauan.com.vn</i></p> <p><i>Products: Cooking Oils</i></p> <p><i>Products Brands: Cooking Oil, Bep Hong, Vi Gia, Huong Me, Dau Nanh Soya, Dau Me SeSa, Hao Vi, Shortening Nakydaco, Dau Me Thom Nguyen Chat, Child, Hao Vi, Dau hat cai (Canola Oil), Dau me thom Hao Vi.</i></p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	One (01) factory in HCMC	Direct importer; May purchase from local producers.
<p>Wilmar Agro Viet Nam Co Ltd.</p> <p><i>Website: www.wilmar-agro.com.vn</i></p> <p><i>Products:</i></p> <p>- Meal: defatted rice bran, stabilized rice bran, sesame cake, imported feed ingredients.</p> <p>- Oil: rice bran oil, rice bran acid oil, sesame oil, coconut oil, fish oil</p> <p><i>Product Brands: Cam Vang, Kim Tru, Wilstar</i></p>	Not available to public	Local traders and Export	Factories in Can Tho and Tien Giang provinces	Local purchase from rice millers/ agents.
Confectionary products and Breakfast cereals				
<p>Mondelez Kinh Do Vietnam</p> <p><i>Website: www.kinhdo.vn</i></p> <p><i>Products: Confectionery Bakery products, FF biscuits, ice cream, sweet and savory snacks, high fiber bread.</i></p> <p><i>Product Brands: Kinh Do, Kido, Aloha, AFC, Celano, Merino, Cosy, Wel, Wel Grow, Wel Yo, Korento, Sachi, Solite, Slide, Trang Vang.</i></p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Factories in Ho Chi Minh City, Hanoi	Direct importer; May purchase from local producers.
<p>Nestlé Vietnam Ltd.</p>	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	Overseas; Four (04)	Direct importer; Purchase from

<p><u>Website:</u> www.nestle.com.vn <u>Products:</u> Confectionery products, breakfast cereals. <u>Product Brands:</u> Kit Kat, Nestle Corn Flakes, Nestle Honey Stars, Nestle Koko Krunch, Nestle Finesse, Nestle Milo, Fitness chocolate and strawberry, FOX's; Nesvita</p>		<p>ets, convenient stores and independent small grocers across Vietnam), export</p>	<p>factories producing breakfast cereals in Dong Nai and Hung Yen</p>	<p>local producers, or through traders / distributors</p>
<p>Bibica Joint Stock Company (Bibica) <u>Website:</u> www.bibica.com.vn <u>Products:</u> 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. <u>Product Brands:</u> Hura, Goodly, Lac Viet, Volcano, Bella, Orienko, Michoco, Growth sure</p>	<p>VND791 billion (Jan.-Sept. 2017) ----- VND 1,163 billion (2016) ----- VND 1,172 billion (2015) ----- VND 1,129 billion (2014)</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>Three (03) factories in Dong Nai; Binh Duong; Hanoi provinces</p>	<p>Direct importer; Purchases from local producers, or through traders / distributors</p>

<p>Orion Food Vina Food Co., Ltd.</p> <p><i>Website: www.orionworld.com</i></p> <p><i>Products: Confectionery products such as pies, cookies, cakes, biscuits, candy and jelly, gums, and chocolate.</i></p> <p><i>Product Brands: Chocopie, Custas, Freshpie, Goute.Xylitol</i></p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam export, HRI</p>	<p>One (01) plant Binh Duong Province; One (01) plant in Bac Ninh Province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p>Hai Ha Confectionery Jsc. (Hahaco)</p> <p><i>Website: http://www.haihaco.com.vn/</i></p> <p><i>Products: Confectionery products such as Chewy candies, Jellies, Lollipops, Cakes, Cream wafers, Cookies, Biscuits, Crackers.</i></p> <p><i>Product Brands: Hai Ha, Good Milk, Inari, Toffee, Banh keo le, Sokiss, Mercury Custard Cake, Chew, Ga Bi Rice Cracker, Long Pie, MiniWaf, SoZoll, pastry, SoHeart, Okie, Coolte, Gallet, Sami, Cheese Wafer, Sochips, H&C, Cream Cracker, O Hi bread, Chew Hai ha, Marta, Chips Hai Ha, Pooz Jelly cup, Keo mem, Gold Bell, Xop fruit, Hai Ha pop, Hard Filling, Keo cung, Trung Thu, Mut Tet.</i></p>	<p>Net revenue VND 584 billion (Jan-Sep. 2017)</p> <p>----</p> <p>VND 843.3 billion (2016)</p> <p>----</p> <p>VND 781.8 billion (2015)</p> <p>----</p> <p>Net profit after tax VND 16.5 billion (Jan-Sep. 2017)</p> <p>----</p> <p>VND 33.6 billion (2016)</p> <p>----</p> <p>VND 26.5 billion (2015)</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam export, HRI</p>	<p>One (01) plant in Phu Tho Province; One (01) plant in Na, Dinh province; and one (01) plant in Bac Ninh Province.</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p>Trang An Confectionery Company</p> <p><i>Website: http://www.trangan.com.vn</i></p> <p><i>Products: Confectionery products such as rice crackers, cookies, cakes, waffle, candies, jelly, moon cakes, snacks.</i></p> <p><i>Product Brands: Trang An, Cuc Cu, Yukihana, Belgi, Crico, Challot, An Loc Phat, Saturn, Cocota, Bon Bon Keo dua caphe. Bonbon Huong Com Trang An, Cocoty, Trang An Trung Thu, Bista. Teppy</i></p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam export, HRI</p>	<p>Four plants in Hanoi; Thanh Hoa, Nghe An and Ben Tre provinces.</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>

<i>Chicken snack, pizza snack, Takio, Huong com, Jute, Fandes, Lambic</i>				
Snack foods (Savory and sweet snacks and nuts)				
Tan Tan Food & Foodstuff Co. <u>Website:</u> http://www.tantan.com.vn <u>Products:</u> <i>Snack food (peas, peanuts and cashew nuts, lotus seeds)</i> <u>Product brands:</u> <i>Tan Tan, Amero, Chocoplus, FunMix, Tans, Snacko, Tan Tan Roasted Peanuts, Dau Phong da ca, Dau phong ca phe, Dau phong Bi cay, Tan Tan Wasabi, Salted Green Peas; nice sweet, kazoo, smile, Vinacashew, Vina Lotus</i>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	One (01) plant in Binh Duong Province	Direct importer; Purchase from local producers, or through traders / distributors
Liwayway Food Industry Co., Ltd. <u>Website:</u> www.oishi.com.ph <u>Products:</u> <i>Cookies, Biscuits and Wafers, Corn snacks, Popcorn and peanuts, Potato snacks, Savory snacks, seafood snacks, sweet snacks, and vegetable snacks.</i> <u>Product brands:</u> <i>Oishi (Oishi Pods Pea snack, Oishi Pillows Choco-filled crackers, Panchos Nacho Cheese flavor, Choco Lo, Orion rings, Prawn Crackers, Boogyman Crunch vegetable snack, Bread pan, Crunchy Karl's corn snack, Cuckoo bag, Fishda, Oheya, Sponge crunch, Mobster caramel cheese popcorn, Wafu, O-puff, Spicy Seafood Curl, Sunday, Caramel Popcorn, Tuber Cuts, Cheese Chips, Cheese Clubs, Choco flakes cereals, Choco Plunge, Corn Ole, Shoestring Potatoes snack, Cripsy Patata, Rinbee Cheese Sticks, Fish Crackers, Ridges, Fruity loops Breakfast cereals, Gourmet Picks Potato chips, Cracklings, Potato Fries, Potato Crips, Kirei, Marty's Cracklin', Circo,</i>	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Four (04) factories in Binh Duong, Bac Ninh, Provinces, Hanoi and Ho Chi Minh City.	Direct importer; Purchase from local producers, or through traders / distributors

<p>Suntory PepsiCo Vietnam Beverage (SPVB)</p> <p><u>Website:</u> http://www.suntorypepsico.vn</p> <p><u>Products:</u> <i>Snack food (potato chips)</i></p> <p><u>Product brands:</u> <i>Poca</i></p>	<p>Not available to public</p>	<p>Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), HRI</p>	<p>One (01) plant in Binh Duong Province</p>	<p>Direct importer; Purchase from local producers, or through other traders / distributors</p>
<p>Orion Food Vina Food Co., Ltd.</p> <p><u>Website:</u> http://www.orionworld.com</p> <p><u>Products:</u> <i>Snack food</i></p> <p><u>Product brands:</u> <i>Snack O'star, Snack Toonies.</i></p>	<p>Not available to public</p>	<p>Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>One (01) plant in Binh Duong Province; One (01) plant in Bac Ninh Province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p>VINAMIT Joint Stock Company</p> <p><u>Website:</u> http://www.vinamit.com.vn</p> <p><u>Products:</u> <i>Snack foods: Air/freeze dried fruits (banana, dragon fruits, coconuts, guava, jackfruits, longan, mandarin, mango, papaya, pineapple, rose apple, soursop, star fruits, strawberries, sweet potato, tomato); frozen fruits and vegetables (avocado, baby corn, chilli, durian, lotus roots, mango, pineapples, potato, sweet potato, taro, watermelon); Vacuum fried fruits and vegetables (banana, bitter melon, carrot, coconut, French beans, jackfruits, okra, pumpkin, starfruit, taro); Chocolate Air Dried Fruits (banana, guava, mango, rose apple, sweet potato); Flavorful fried fruit chips (cassava, sweet potato, taro); nuts and seeds (vacuum dried cashew, dried lotus seeds); nut candies (peanut butter candy, peanut candy, sesame candy); Organic fruits and vegetables</i></p> <p><u>Product brands:</u> <i>Vinamit, Vinatural, Barley, Fomeli, Follow me, LV.</i></p>	<p>Not available to public</p>	<p>Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>One (01) processing plant in , Binh Duong Province;</p> <p>Vinamit 150 hectare Organic Farm in Binh Duong Province</p>	<p>Direct importer; purchase from local producers, or through other traders / distributors</p>
<p>Long An Food processing Export Joint Stock Company (Lafoco)</p>	<p>VND 1,017 billion (Jan.-Sept. 2017)</p>	<p>Export, distributors</p>	<p>Two (02) factories in Long An province</p>	<p>Direct importer; Purchases from local producers, or through</p>

<p><u>Website:</u> www.lafooco.vn www.lafooco.com.vn</p> <p><u>Products:</u> Natural cashew nuts, processed cashew nuts, processed peanuts.</p> <p><u>Product brands:</u> Lafooco;</p>	<p>----- VND 876 billion (2016) ----- VND 877 billion (2015) ----- VND 691 billion (2014)</p>			traders / distributors
Beverages, Beers and Liquor, Tea and Coffee and other Drinking Products				
<p>Sai Gon Beer-Alcohol-Beverage Corporation (Sabeco)</p> <p><u>Website:</u> http://sabeco.com.vn</p> <p><u>Products:</u> Alcoholic and non-alcoholic drinks including beer, liquor, soft drinks, mineral water.</p> <p><u>Product Brands:</u> 333' export, 333' premium export, Saigon Special, Saigon Export and Saigon Lager, Chu Hi, Dakai, Saigon Gold, Ruou Binh Tay, Soft drink Sarsaparilla, oft drink with Orange flavor, Soft drink with Strawberry flavor, Soft drink with Mint flavor, Cream Soda soft drink, Nha Dam Non-gas beverage, Chuong Duong pure water.</p>	<p>Net sales VND15,727 billion (Jan.-Jun. 2017) ----- VND30,569 billion (2016) ----- VND27,144 billion (2015) ----- VND24.611 billion (2014) ----- Net profit after tax VND 2,279 billion (Jan.-Jun. 2017) ----- VND4,655 billion (2016) ----- VND3,600 billion (2015) ----- VND2,808 billion (2014)</p>	Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, export, HRI	Twenty three (23) Beer Factories; One (01) liquor factory and one (01) beverage factory in Vietnam	Direct importer; Purchase from local producers, or through traders / distributors
<p>Hanoi Alcohol and Beverage JSC Corporation (Habeco)</p> <p><u>Website:</u> http://www.habeco.com.vn</p> <p><u>Products:</u> Beer, Liquor</p> <p><u>Product Brands:</u> Hanoi Beer, Truc Bach, Ruou Ha noi, Hanoi Beer Premium, Ruou Anh Dao (Cherry Liquor), Ruou Ca phe (Coffee Liquor), Ruou Chanh (Lemon Liquor), Ruou Lua Moi (New Rice</p>	<p>Net sales VND 7,203 billion (Jan.-Sept. 2017) ----- VND 9,996 billion (2016) ----- VND9,638 billion (2015)</p>	Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, export, HRI	3 factories in Hanoi; 1 factory in Hai Duong Province; 1 factory in Hai Phong; 1 factory in Thai Binh Province; 1 factory in Quang Ninh Province; 1	Direct importer; Purchase from local producers, or through traders / distributors

<p><i>Liquor), Ruou Thanh Mai (Apricot Liquor), Bluebird Vodka, Zuz 20 Liquor, Vodka Hanoi (Blue Label), Vodka Hanoi (Red Label).</i></p>	<p>Net profit after tax VND 631 billion (Jan.-Sept. 2017) ----- VND 796.7 billion (2016) ----- VND 945.4 billion (2015)</p>		<p>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</p>	
<p>Ladofoods Group</p> <p><u>Website:</u> http://www.ladofoods.vn</p> <p><u>Products:</u> Wine products, Sparkling wine, cashew nuts</p> <p><u>Product brands:</u> Vang Da Lat (Classic Special, Export Blue, Premium, Superior, Export, Classic, Strong, Dankia , Chateau Da Lat-Special, Chateau Da Lat-Reserve, Chateau Da Lat-Signature, Chateau Da Lat-Special, Chateau Da Lat-Tradition, Chateau Da Lat- Extra, Chateau Da Lat-APEC collection 2017, Chateau Da Lat- Sparkling Red Wine, Chateau Da Lat-Sparkling White wine, Vivazz, Nouvo Sangria Red Wine, Nouvo Sangria White Wine, Nouvo Red Wine, Cashew nuts</p>	<p>Net sales VND 34.9 billion (Jan.-Sept. 2017) ----- VND 81.8 billion (2016) ----- VND 112 billion (2015) ----- Net profit after tax VND 11.9 billion (Jan.-Sept. 2017) ----- VND 22.7 billion (2016) ----- VND 19.2 billion (2015)</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, HRI</p>	<p>Ladora Winery in Da Lat, Lam Dong Province; Ladora farm in Ninh Thuan province; Ladofoods cashew nut processing factory in Lam Dong Province</p>	<p>Use materials from its own growing area; Direct importer; Purchase from local producers, or through traders / distributors</p>
<p>Suntory PepsiCo Vietnam Beverage (SPVB)</p> <p><u>Website:</u> http://www.suntorypepsico.vn</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, Revive.</p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, export, HRI</p>	<p>Plants in HCMC, Quang Nam, Binh Duong, Can Tho and Dong Nai Provinces.</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>

<i>Lipton, Lipton Green Tea, Oolong Tea+ Plus, Mountain Dew, and Aquafina.</i>				
Coca Cola Vietnam <u>Website:</u> coca-cola.vn <u>Products:</u> Carbonated Drinks, bottled drinks, mineral drinking water, milk products. <u>Product Brands:</u> Coca-Cola, Joy, Samurai, Sunfill, Fanta Chanh, Fanta Dau, Soda Chanh, Diet Coke, Minute Maid, Splash; Dasani, Nutriboost.	Not available to public	Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam, export, HRI	Plants in Hanoi; Da Nang; and Ho Chi Minh City;	Direct importer; Purchase from local producers, or through traders / distributors
Tan Hiep Phat Beverage Group <u>Website:</u> http://www.thp.com.vn <u>Products:</u> Tea drinks, nutrition drinks, soya milk, beer, coffee, drinking water. <u>Product Brands:</u> 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.	Not available to public	Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export, HRI	Plant in Binh Duong Province; Plant in Ha Nam Province; Plant sin Chu Lai, Quang Nam Province.	Direct importer; Purchase from local producers, or through other traders / distributors
Masan Consumer Holdings Company Limited (MCH) <u>Website:</u> http://www.masanconsumer.com <u>Products:</u> Coffee products, instant cereals. <u>Product Brands:</u> Vinacafé (Vinacafe 3-in-1 instant coffee), Wake Up (Wake Up Café Saigon, Wake up Café Weasel Flavor); Phine 2 in 1 coffee, Kachi Instant Cereal.	Net revenue VND 8,791 billion (9 months 2017) ----- VND13,790 billion (2016) ----- VND13,212 billion (2015) ----- VND13,098 billion (2014) ----- Net profit after tax VND 1,316 billion (9 months 2017) -----	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.	One (01) coffee plant in Bien Hoa-Dong Nai province;	Direct importer; Purchase from local producers, or through traders / distributors

	VND2,791 billion (2016) ----- VND2,901 billion (2015) ----- VND3,425 billion (2014)			
Vietnam Coffee Corporation (Vinacafe) <u>Website:</u> www.vinacafe.com.vn <u>Products:</u> Green coffee beans, roasted coffee, instant coffee <u>Product Brands:</u> Vinacafe, Vinacafe Natural, Vinacafe Select, Washed Robusta, Unwashed Robusta	Not available to public	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI.	Plants in Dak Lak, Gia Lai, Dong Nai, Kon Tum, Lam Dong, and Bac Ninh Provinces;	Direct importer; Purchase from local producers, or through traders / distributors
TNI CORPORATION <u>Website:</u> http://www.tnikingcoffee.com <u>Products:</u> Ground Coffee, Instant Coffee. <u>Product Brands:</u> King Coffee (Gourmet Blend, Premium Blend, Inspire Blend, Expert Blend, 3 in 1, 2 in 1, Coffee & Creamer, Pure Black, Espresso)	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	One (01) plant in Binh Duong Province; One (01) plant in Bac Giang Province.	Purchase from local producers, or through other traders / distributors.
Trung Nguyen Group <u>Website:</u> www.trungnguyen.com.vn <u>Products:</u> Green Coffee beans, Instant coffee and roasted coffee <u>Product Brands:</u> Trung Nguyen, G7, Gu Manh, Weasel coffee, Legendee, Brothers, 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,	Not available to public	Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), export, HRI	Two (02) plants in Binh Duong and Dak Lak Province;	Direct importer; Purchase from local producers, or through other traders / distributors.

<p><i>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>Vietnam Tea Corporation (Vinatea)</p> <p><u>Website:</u> www.vinatea.com.vn</p> <p><u>Products:</u> Green Tea, Black Tea, Premium Tea, Herbal Tea</p> <p><u>Product Brands:</u> Vinatea (Jasmine tea, Premium tea, Sleep well tea, Daisy Tea, Ginger Tea, English breakfast tea), Tra Thai-Long Dinh, Tan Cuong Thai Nguyen, Che Shan vien, Che Nhai, Olong Tea, Thien Huong, Tra den OPA, Tra den OP, Che Suoi Giang, Che Long Van, Moc Chau.</p>	<p>(approximately) VND 414 billion (2017) ---- VND 375 billion (2016)</p>	<p>Distributors, retail (supermarkets hypermarkets and independent small grocers across Vietnam), export, HRI</p>	<p>4,700 ha tea growing area; 10 tea processing plants in Moc chau, Son La Province; Soc Son, Hanoi; Thai Nguyen Province; Yen Bai Province; and HCMC;</p>	<p>Use materials from its tea fields; Purchase from local producers, or through traders / distributors</p>
<p>Asia Tea Co., Ltd</p> <p><u>Website:</u> http://asiatea.com.vn/</p> <p><u>Products:</u> Green Tea, Black Tea</p> <p><u>Product brands:</u> Asia Tea</p>	<p>VND 153 billion (Jan.-Sept. 2017) ----- VND 171 billion (2016) ----- VND 154.7 billion (2015)</p>	<p>Export</p>	<p>02 warehouses in Ba Vi, Hanoi and 01 factory in Phu Tho province</p>	<p>Purchases from local famers.</p>
<p>Vietnam Dairy Products JSC (Vinamilk)</p> <p><u>Website:</u> www.vinamilk.com.vn</p> <p><u>Products:</u> Beverages such as fruit juice, Aloe Vera drink, bottled drinking water, salty lemonade, tea, ice cream, soymilk.</p> <p><u>Product Brands:</u> Vfresh, ICY, Nhoc Kem (Ice cream for kids), Subo, Delight, Oze, Twin Cows, GoldSoy.</p>	<p>Net sales VND 46.8 trillion (2016) --- VND 40.1 trillion (2015) ----- Net profit VND 11.2 trillion (2016) --- VND 9.3 trillion (2015)</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), stores, export, HRI, airplane service</p>	<p>13 domestic plants in Bac Ninh, Thanh Hoa, Nghe An, Da Nang, Binh Dinh, HCMC, Binh Duong, and Can Tho Provinces; Three (03) plants in Cambodia, USA and New Zealand</p>	<p>Direct importer, Purchases from own farms and local producers.</p>

Nestlé Vietnam Ltd <u>Website:</u> www.nestle.com.vn <u>Products:</u> mineral water, instant coffee products, malt drinks, tea <u>Product Brands:</u> Milo, Nescafé, Nescafé 3in 1, Nescafé Viet, La Vie, Nestea Lemon, Nescafé Gold, Nestcafé Red Cup, Nestcafé Dolce Gusto, Coffee Mate, Fruit Time, Nescafé Gold, Nestcafé Red Cup, Nestcafé Dolce Gusto, Coffee Mate, Fruit Time,	Not available to public	Distributors, retailers (supermarketshypermarkets, convenient stores and independent small grocers across Vietnam), export	Overseas; 04 factories in Dong Nai and Hung Yen; 02 La Vie factories in Long An & Hung Yen	Direct importer; Purchase from local producers, or through traders / distributors
Nafoods Group <u>Website:</u> http://www.nafoodsgroup.com.vn <u>Products:</u> Fruit juice concentrate drinks; Frozen fruits and vegetables; Fresh fruits. <u>Product Brands:</u> Juice Smile, GacDay	<u>Revenue:</u> VND 463 billion (2016) ----- VND 534 billion (2015)	Importer, Trader, Manufacturer (processor, bottler, etc.), Blender, Wholesaler, Distributors, Retailers, Consumers	01 plant in Nghe An, Vietnam and 01 plant in Long An province, Vietnam	Self-supply, Broker/ supply companies, Processor, Contract farming, collectives
Liwayway Food Industry Co., Ltd. <u>Website:</u> www.oishi.com.ph <u>Products:</u> beverage products (Milk products, Drinks and juices) <u>Product brands:</u> Fiber and Fruit drinks, Oishi Hi coffee, Oaties Milk, Smart C dinks, Sundays, Tea Matchi, Great Lakes Juice	Not available to public	Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export, HRI	Four (04) factories in Binh Duong, Bac Ninh Provinces, Hanoi and Ho Chi Minh City.	Direct importer; Purchase from local producers, or through traders / distributors
Vinasoy Corporation <u>Website:</u> http://www.vinasoycorp.vn <u>Products:</u> soy milk products <u>Product brands:</u> Vinasoy, Fami, soymen	Not available to public	Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export, HRI	Three (03) factories in Quang Ngai, Bac Ninh , and Binh Duong Provinces	Direct importer; Purchase from local producers, or through traders / distributors
Dry goods, condiments and sauces (i.e. canned soup, dry mixes, pasta, seasonings, sauces)				
Nam Duong International Foodstuff Corporation.	Not available to public	Distributors, retailers supermarkets, hypermarkets and	Hiep Phuoc Industrial Park in HCMC	Direct importer; May purchase from local

<p><u>Website:</u> www.namduong.com.vn</p> <p><u>Products:</u> Sauces and Condiments(soya sauce, chilli sauce, black sauce, tomato sauce, oyster sauce, bouillon granule, mayonnaise)</p> <p><u>Product Brands:</u> Nam Duong, Neptune, Simply</p>		independent small grocers across Vietnam) and export.		producers.
<p>Ajinomoto Vietnam Co. Ltd.</p> <p><u>Website:</u> http://www.ajinomoto.com.vn</p> <p><u>Products:</u> Umami Seasonings, Flavor Seasonings, Liquid Seasonings, Complete Seasonings, Processed food, Beverage.</p> <p><u>Product Brands:</u> Ajinomoto®, Aji-No-Moto®, Aji-No-Moto® PLUS®, Aji-ngon® Pork Flavor; Aji-ngon® Chicken Flavor; Aji-ngon® Flavor Seasoning from Mushroom & Lotus Seed; Ajinomoto® Chicken Powder; Aji-mayo® Mayonnaise; Phu Si Soy Sauce; Ajinomoto® Fermented Rice Vinegar; Aji-Quick® Dry Crispy Flour; Aji-Quick® Chicken Crispy Flour; Aji-Quick® Seafood Crispy Flour; Aji-Quick® Thai's Hotpot; Aji-Quick® Braise Pork; Aji-Quick® Beef Pho Complete Seasoning; Bot Canh Ajinomoto; Ajinomoto Pancake Mix Powder; Birdy® Canned Coffee; Birdy® Can Matcha Latte; Birdy® 3in1 Milk Coffee; Birdy® 3in1 Matcha Latte; Ume chan™ Apricot in syrup;</p>	Not available to public	Distributors, retail (supermarkets hypermarkets and independent small grocers across Vietnam), export.	Two (02) factories in Dong Nai province	Direct importer; Purchase from local producers, or through traders / distributors
<p>Nestlé Vietnam Ltd.</p> <p><u>Website:</u> www.nestle.com.vn</p> <p><u>Products:</u> soya sauce, oyster sauce, seasonings</p> <p><u>Product Brands:</u> Maggi</p>	Not available to public	Distributors, retailers (supermarkets hypermarkets convenient stores and independent small grocers across Vietnam), export	Four (04) factories in Dong Nai and Hung Yen	Direct importer; Purchase from local producers, or through traders / distributors
<p>Cholimex Food Joint Stock Company</p> <p><u>Website:</u> http://www.cholimexfood.com</p>	Revenue: VND 1,428 billion (2016) -----	Distributors, retailers (supermarkets hypermarkets, convenient stores and independent small grocers across Vietnam),	Factory in Vinh Loc Industrial Park, Ho Chi Minh City	Direct importer; Purchase from local producers, or through traders /

<p><u>vn/</u></p> <p><i>Products: Sauces (Sriracha hot chili sauce, Extra hot chili sauce, Natural chili sauce, sweet and sour chili sauce, plum chili sauce, sweet chili sauce, tomato ketchup, tomato sauce, pickled soybean sauce, Chinese black mushroom seasoning, soup powder, seafood sour soup powder, oyster mushroom soup powder, vegetable satay, shrimp satay, Xo shrimp satay, Thai hot pot, coconut chili sauce, ginger chili sauce, pineapple chili sauce, tamarin chili sauce, hoisin chili sauce, pickled soybean sauce, chili sauce for “Pho”, barbecue sauce, sauce for fried fish, salad dressing, tamarind roast sauce, salt and pepper with lemon sauce, sour soup for seafood mix, sauce for fish and meat, Cholimex Premium Fish Sauce, Fish Sauce, Huong Viet Soy Sauce); Frozen Processed Food (Frozen Tempura breaded shrimp, breaded fish, Triangle Shrimp Toast, shrimp pastry, shrimp/ vegetable money bags, spices, spring rolls, Dim Sum);</i></p> <p><i>Product Brands: Cholimex</i></p>	<p>VND 1,219 billion (2015)</p> <p>----</p> <p>Profit after tax VND 50.7 billion (2016)</p> <p>----</p> <p>VND 46.3 billion (2015)</p>	<p>export</p>		<p>distributors</p>
<p>Nam Ngu Phu Quoc One Member Co., Ltd.</p> <p><i>Products: Fish Sauces</i></p> <p><i>Product Brands: Chin Su, Nam Ngu</i></p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarketshypermarkets convenient stores and independent small grocers across Vietnam), export</p>	<p>Plant in Ohu Quoc, Kien Giang Province</p>	<p>Purchase from local producers, or through traders / distributors</p>
<p>Specialized food ingredients (i.e. additives, preservations, thickeners, sugar, sweeteners and others)</p>				
<p>Asia Chemical Corporation (ACC)</p> <p><i>Website: www.asia-chemical.com</i></p> <p><i>Products of ACC:</i></p> <p><i>Dairy ingredients, confectionery ingredients, bakery ingredients, Ice Cream ingredients, Beverage ingredients, noodle and convenience ingredients, meat</i></p>	<p>US\$ 88 million (2016)</p> <p>-----</p> <p>US\$ 78.89 million (2015)</p> <p>-----</p> <p>US\$ 90.86 million (2014)</p>	<p>Food, cosmetic, and beverage industries.</p>	<p>Head Office in Ho Chi Minh City</p> <p>----</p> <p>Branch office in Ha Noi</p> <p>----</p> <p>One sub-company and factory in Binh Duong Province</p>	<p>Direct importer</p>

<p><i>processing ingredients, Functional food and Pharmaceutical Ingredients, and other food ingredients.</i></p> <p><u>Sub-companies:</u> Golden Frog Company Ltd <i>Website: www.goldenfrog.com.vn</i> <i>Products of Golden Frog Company Ltd.: Flavors and fragrance ingredients</i></p>				
<p>Asia Saigon Food Ingredient(AFI)</p> <p><i>Website: http://www.afi.vn/</i> <i>Products: Food Ingredients, Non Dairy Creamer , Cereal Flake</i></p> <p><i>Product Brands: Vina Creamer, Premium Creamer, Golden Cream, A Cream, Vina Cereal , Golden Flake</i></p>	<p>VND 800 billion (2017 est.) ----- VND 740 billion (2016) ----- VND 600 billion (2015)</p>	<p>Distributors, Coffee manufacturer, Nutrition-cereal manufacturer</p>	<p>Factory in Binh Duong province</p>	<p>Direct importer; Purchase from local producers, or through traders / distributors</p>
<p>Hoang Lam Trading and Foods Technology Jsc. (HOLAFOODS)</p> <p><i>Website: www.holafoods.com.vn</i> <u>n</u> <i>Products: Dairy ingredients, Confectionery ingredients, Bakery ingredients, Ice Cream ingredients, Beverage ingredients, and other food ingredients.</i></p> <p><u>Sub-companies:</u> 1) Farina Foods Company Ltd. <i>Website: http://www.farina.com.vn</i> <i>Products: Food ingredients for bakery and confectionary industry</i> 2) Bakerland Company <i>Website: www.bakerland.vn</i> <i>Products: Food ingredients, food additives, food equipment.</i> 3) Demifoods company <i>Products: Fast Moving Consumer Goods</i></p>	<p>USD 37 millions (2016) ----- USD 35 millions (2015) ----- USD 26.5 millions (2014)</p>	<p>Distributors, retail (supermarkets, hypermarkets and independent small grocers across Vietnam), food processors, industrial customers; food services customers</p>	<p>Head Office in Hanoi, branch offices in HCMC and Da Nang, three sub-companies:</p> <ol style="list-style-type: none"> 1. Farina Foods Company Ltd (Factory in Bac Ninh Province) 2. Bakerland Company 3. Demifoods company 	<p>Direct importer; Purchase from local traders / distributors</p>
<p>Hoang Anh Flavors and Food Ingredients, Ltd.</p> <p><i>Website: www.hoanganh.com.vn</i></p>	<p>Not available to public</p>	<p>Food processors, industrial customers; traders, pharmaceutical manufacturers</p>	<p>One factory in Ho Chi Minh City (HCMC)</p>	<p>Direct importer; Purchase from local producers, and through</p>

<p><u>l</u> <i>Products: Flavor products for Dairy, Bakery, Confectionery, Beverage, Condiments, Instant Noodles, and Pharmaceutical products</i></p> <p><i>Food Ingredients: Natural Extracts, Nutraceutical Ingredients, Vitamin Premix</i></p>				traders / distributors
<p>My Uc Science Technology Development Joint Stock Company (My Uc STD Jsc.)</p> <p><i>Website: www.std.com.vn</i></p> <p><i>Products: Meat and fish product ingredients; noodle ingredients; sauce ingredients; tofu ingredients, bakery ingredients and other food ingredients.</i></p>	<p>US\$ 3.3 Million (2016) ----- US\$ 3.0 Million (2015) ----- US\$ 2.2 Million (2014)</p>	Food processors	Head Office and factory in Ho Chi Minh City	Direct importer
<p>TMA FOODS CO.,LTD</p> <p><i>Website: www.tmafoods.com</i></p> <p><i>Type of TMA foods Co.: Importer, Distributor</i></p> <p><i>Products: Food ingredients such as Oil & Fats, Cocoa Powder, Milk powder, Chocolate, Flavors, popcorns.</i></p>	<p>VND 338 Billions (2016) ----- VND 281 Billions (10/2015) ----- VND 304 Billions (2014)</p>	Distributors, retailers supermarkets, hypermarkets and independent small grocers across Vietnam, food processors, industrial customers; food services customers.	Head Office in Ho Chi Minh City Branch offices in Ha Noi	Direct importer
<p>Lam Son Sugar Cane Joint Stock Corporation (Lasuco)</p> <p><i>Website: http://www.lasuco.com.vn</i></p> <p><i>Products: Refined Sugar products</i></p> <p><i>Product brands: Lam Son</i></p>	<p>Revenue VND 2,010 billion (2015) --- Profit after tax VND 102 billion (2015) -----</p>	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	One factory in Thanh Hoa Province	Purchase from local producers, and through traders / distributors
<p>Thanh Thanh Cong Tay Ninh Joint Stock Company - TTCS</p> <p><i>Website: http://tcsugar.com.vn</i></p> <p><i>Products: Refined Sugar,</i></p>	<p>Revenue VND 4,503 billion (FY 2016 - 2017) --- VND 4,043 billion (FY 2015 -</p>	Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), export	One factory in Tay Ninh Province	Purchase from local producers, and through traders / distributors

<p><i>molasses,</i> <i>Non-alcoholic beverages,</i> <i>mineral water, organic sugar product.</i></p> <p><i><u>Product brands:</u> TSU, Miaqua MIMOSA</i></p>	<p>2016) ---- VND 2,072 billion (FY 2014 - 2015) ---- Profit after tax VND 339.3 billion (2016-2017) ---- VND 294.2 billion (FY 2015-2016)</p>			
<p>Prepared meals (mixed ingredient “ready-to-eat” or “ready-to-heat”: retail and food service meals and entrees, noodles)</p>				
<p>Acecook Vietnam JSC.</p> <p><u>Website:</u> https://acecookvietnam.vn</p> <p><u>Products:</u> Instant noodles, vermicelli, Instant rice noodle and vermicelli</p> <p><u>Product Brands:</u> Acecook Hao Hao, De Nhat, Enjoy, Phu Huong, My Lau Thai, Udon, Modern, Mikochi, Pho Xua&Nay, Chip Chip, Hit Ha, The Gioi Mi, Yummy, Mibig, Hang Nga, Tao Quan, Hao 100, Bon Phuong, Sô Đô, Good, Nhip Song, Nho Mai Mai, Mien Phu Huong, mien YenTiec, Gochi, Siu cay, Handi Hao Hao, Mi Kim Chi, Kingcook, Good 100, Oh! Ricey, Real Pho, Bun Gio Heo, Daily, Wonton, Acecook Pho.</p>	<p>Approximately US\$ 390 millions (2016)</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), export</p>	<p>10 factories in provinces Hung Yen, Bac Ninh, Da Nang, Binh Duong, HCMC, Vinh Long</p>	<p>Direct importer; Purchases from local producers.</p>
<p>Asia Food Industry Co. Ltd. (ASIA FOODS)</p> <p><u>Website:</u> www.asiafoods.vn</p> <p><u>Products:</u> noodle, porridge and Pho</p> <p><u>Product Brands:</u> Gau Do (Red Bear instant noodle), Trung Vang noodle, Moc Viet noodle, Gau do VIP cub noodle, Gau Do porridge, Gau Do Pho, Gau Do Noodle Soup, Soi Pho Vang (Pho Golden String), Gau Yeu (lovely bear instant noodle, Hello instant noodle, Hello Rice Gruel, Shangha Rice Gruel, Shang ha Cup</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), export</p>	<p>One (01) plant in Ho Chi Minh City; Two (02) plants in Binh Duong province, one (01) plant in in Bac Ninh province, and one (01) plant in Da Nang.</p>	<p>Direct importer; Purchases from local producers.</p>

<p><i>Porridge, Hao Hang, Vifood instant noodle.</i></p>				
<p>Vietnam Food Industries Joint Stock Company (VIFON)</p> <p><u>Website:</u> http://www.vifon.com.vn</p> <p><u>Products:</u> Instant Noodle, Instant Porridge Instant Vermicelli, Instant Pho, Chili Sauces; Soup powder, seasoning.</p> <p><u>Product Brands:</u> VIFON, Ngon Ngon, ROMA, Tu Quy, Viet CUISINE, Hoang Gia, Pho Bo (Beef flavor instant noodle), Pho Chay Rau Nam (Mushroom Vegetable Instant Rice Noodle), Phu Gia, Bun Rieu Cua (Crab soup flavor vermicelli), Banh Da Cua (Crab flavor instant rice pancake), Chao Thit ga, Chao Ga (Chicken flavor Instant Porridge), Chao Thit Bam (Pork Instant Porridge), Bot Canh (Seasoning), Hu Tieu Nam Vang (Phnom penh style instant noodle); MIYUMI tom su chua cay, MIYUMI bo rau thom, MIYUMI suon non thit bam, My Lau Thai Tomyum, My Ngon Ngon Bo (Beef flavor Instant Noodle), Vifon Mi Bo (Beef flavor Instant Noodle), Bot Canh Tom (Shrimp seasoning), Vifon Tuong Ot (Chilli Sauce), Bun Bo Hue (Hue style beef flavor instant rice vermicelli), Mi ga tim (Chicken Flavor Instant Noodle), Tasty Thit heo (pork flavor instant noodle), Tasty Thit ga (Chicken flavor instant noodle), Tasty Ca (Fish Flavor instant Noodle)</p>	<p>Not available to public</p>	<p>Distributors, retail (supermarketshypermarkets and independent small grocers across Vietnam), export.</p>	<p>One (01) plant in Ho Chi Minh City; One (01) plant in Hanoi; one (01) plant in Hai Duong province</p>	<p>Direct importer; Purchases from local producers</p>
<p>Uni-President Vietnam</p> <p><u>Website:</u> http://www.uni-president.com.vn</p> <p><u>Products:</u> Noodles</p> <p><u>Product Brands:</u> Uni-President, Kitchen King Noodle,</p>	<p>Not available to public</p>	<p>Distributors, retailers (supermarketshypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Factory in Binh Duong province</p>	<p>Direct importer; Purchase from own farms and from local traders and producers.</p>

<p><i>Pineapple Noodle Vegetable Beef, Fried waiver Noodles, Uni-Tom, Tieu Nhi, Unif Cup, King Chef, Unif.</i></p>				
<p>Colusa Miliket Foodstuff JSC (COMIFOOD JSC)</p> <p><u>Website:</u> http://comifood.com</p> <p><u>Products:</u> Instant Noodles, Instant Porridges, Seasoning</p> <p><u>Product Brands:</u> Colusa - Miliket; Colusa; Miliket, Mi hai tom huong vi Sate, Mi hai tom huong vi hai san, Mi hai tom chua cay cao cap; Mi bo bit tet; Mi Tom Ga; Mi ga xanh; Mi Ga cao cap; Mi tom Sa te; Mi Tom; Pho ga dac biet; Pho Ga; Bun Tom Thit; Bun Xao Kho; Bun xao chay Miliket Hu Tieu Nam Vang; Mien Ga; Mien Cua. Colusa Dry Serving Instant Noodles, Colusa Seafood Flavor Instant Noodle, Colusa Pork Flavor Instant Noodle, Colusa Vegetable Instant Noodle, Colusa Instant Noodle Onion Satay Flavor, Colusa Chicken-Shrimp Flavor Instant Noodle, Colusa Instant Noodle Beefsteak Flavor, Chao Huong vi Nam (Mushroom Flavor Instant Porridge), Chao Ca loc (Snake Head Fish Flavor Instant Porridge, Chao Huong vi thit bam (Pork Flavor Instant Porridge), Chao Huong Vi Ga (Chicken Flavor Instant Porridge), Bot Canh (Seasoning)</p>	<p>Net sales revenue</p> <p>VND 458.8 billion (2016)</p> <p>----</p> <p>VND 477 billion (2015)</p> <p>-----</p> <p>VND 487 billion (2014)</p> <p>-----</p> <p>Net profit after tax</p> <p>VND 24.5 billion (2016)</p> <p>----</p> <p>VND 40.5 billion (2015)</p> <p>-----</p> <p>VND 26.7 billion (2014)</p>	<p>Distributors, retailers (supermarkets, hypermarkets and independent small grocers across Vietnam), Export.</p>	<p>Factory in Ho Chi Minh City</p>	<p>Direct importer; Purchases from own farms and from local traders and producers.</p>
<p>Meizan CLV Corporation.</p> <p><u>Email:</u> mcc@vn.wilmar-intl.com</p> <p><u>Products:</u> Premixes, Macaroni, Egg Noodle.</p> <p><u>Product Brands:</u> Meizan, Kiddy.</p>	<p>Not available to public</p>	<p>Distributors, retailers, supermarkets, hypermarkets and independent small grocers across Vietnam and export</p>	<p>Factory in Ho Chi Minh City</p>	<p>Local suppliers.</p>
<p>Milling Products, Rice, wheat flour, potato flour, starch</p>				
<p>VINAFOOD 1 Flour Co. Ltd.</p> <p><u>Website:</u> vnflflour.com.vn</p> <p><u>Products:</u> All kinds of wheat flour products</p>	<p>VND 570 billion (2016)</p> <p>-----</p> <p>VND 680</p>	<p>Noodle Producers; Bread Producers; Confectionery companies, Food Processing Companies</p>	<p>Plants in Haiphong City and Nghe An Province</p>	<p>Direct wheat importer; Purchase from local traders</p>

<u>Product Brands:</u> <i>Phượng Hoàng, Trường Sa, Hồng Yến, Hoa Phượng đỏ, Trống Đổng, Bến Thủy, Thành Vinh, Bô Cầu, BP9, BP7, Hoa Đào, Industrial Flour.</i>	billion (2015) ----- VND 710 billion (2014)	and Retailers.		
VimafLOUR Ltd. <u>Website:</u> www.vimafLOUR.com.vn <u>Products:</u> <i>Flour and other relative products</i> <u>Product Brands:</u> <i>VimafLOUR</i>	Not available to public	Milling and processing flour and other relative products	One factory in Cai Lan Industrial Zone, Quảng Ninh province	Direct wheat importer
Uni-President Vietnam Co.,Ltd. <u>Website:</u> http://www.unifLOUR.vn <u>Products:</u> <i>Flour products</i> <u>Product Brands:</u> <i>UnifLOUR</i>	VND 1.2 trillion (2016) ---- VND 1.1 trillion (2015)	Distributors, retailers, traditional market (independent small grocers across Vietnam), Export.	Factories in Binh Duong province and Quang Nam province	Direct wheat importer
Vietnam Flour Mills Ltd. <u>Website:</u> vfmvn.com.vn <u>Products:</u> <i>Wheat flour, Wheat germ. Wheat pollard</i> <u>Product Brands:</u> <i>Red Key, Pink Key, Blue Key, Orange Key, Red Pen, Blue Pen, Brown Compass, Blue Compass, Green Compass, Pink Compass, Satellite, Meizan.</i>	Not available to public	Wholesalers, retailers supermarkets, hypermarkets and independent small grocers across Vietnam) and export.	Factories in Ba Ria-Vung Tau Province and Quang Ninh province.	Direct importer; May purchase from local traders.
Gentraco Corporation <u>Website:</u> gentraco.com.vn <u>Products:</u> <i>Milled rice</i> <u>Product Brands:</u> <i>Miss CanTho, Cò trắng, Ngọc Đổng</i>	Approximately VND 1,950 billion (Jan.-Sept. 2017) ----- VND 2,500 billion (2016) ----- VND 2,200 billion (2015)	Supermarkets Food shops in Vietnam and export to other countries (Singapore, Hong Kong, UAE, USA)	Factories in Can Tho, Dong Thap and An Giang provinces	Purchase from local farmers/producers, Direct importer and exporter

Source: Company websites, Stock Exchange Websites

Note: Most information has been provided by companies or 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 or provided by the companies.

D. SECTOR TRENDS

FAS/Vietnam would like to highlight specific sectors that have seen high levels of growth and/or significant positive changes in the past 5 years:

Packaged Food

In Vietnam, packaged food consumption has been increasing in the past five years. According to Euromonitor's survey, both sales volume and value of packaged food in Vietnam has been growing (see Tables 11, 12). In 2016, all types of packaged food sales increased by 7.5 percent in sales volume and 8.6 percent in sales value from 2015. Modern and busier lifestyles, as well as the perception of packaged food being safer and more hygienic, and increased exposure to Western culture and cuisine are factors making more and more consumers switch from unpackaged to packaged food. In addition, value-added products promoting health benefits and convenience have also helped to boost sales. Sales of packaged food to foodservice channels has also been rising in recent years due to booming number of fast food chains, restaurants, cafes, bars, and pubs.

Table 11: Sales Volume of Packaged Food by Category (Volume 2012-2016)

Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Baby Food	70,560	79,960	89,590	97,180	104,220	7.2%
Baked Goods	230,910	244,980	260,630	274,530	288,560	5.1%
Breakfast Cereals	280	310	350	410	470	14.6%
Confectionery	84,700	90,870	96,190	101,430	106,390	4.9%
Dairy	885,110	995,270	1,104,430	1,215,290	1,331,890	9.6%
Edible Oils	418,360	448,530	475,340	502,990	531,170	5.6%
Ice Cream and Frozen Desserts	22,220	23,810	25,280	26,910	28,710	6.7%
Processed Fruit and Vegetables	3,080	3,430	3,800	3,920	4,030	2.8%
Processed Meat and Seafood	49,700	53,470	56,800	59,720	62,680	4.9%
Ready Meals	9,020	10,340	11,870	13,030	14,230	9.2%
Rice, Pasta and Noodles	680,990	762,010	853,700	930,040	1,002,440	7.8%
Sauces, Dressings and Condiments	380,750	403,220	427,590	452,670	478,630	5.7%
Savoury Snacks	51,160	54,810	58,970	62,840	66,740	6.2%
Spreads	1,290	1,370	1,450	1,530	1,610	5.2%
Sweet Biscuits, Snack Bars and Fruit Snacks	70,530	76,820	83,380	90,260	97,420	7.9%
Packaged Food	2,958,640	3,249,210	3,549,360	3,832,740	4,119,180	7.5%

Source: Euromonitor International

Table 12: Sales Value of Packaged Food by Category (Value 2012-2016)

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Baby Food	19,055	23,230	27,231	28,907	30,822	6.6%
Baked Goods	10,658	12,016	13,492	14,492	15,648	7.9%
Breakfast Cereals	73	89	101	113	134	17.8%
Confectionery	7,370	8,087	9,011	9,763	10,598	8.6%
Dairy	34,898	41,300	47,945	53,697	60,251	12.2%
Edible Oils	20,020	22,485	24,238	25,889	27,774	7.3%

Ice Cream and Frozen Desserts	1,579	1,839	2,064	2,320	2,620	12.9%
Processed Fruit and Vegetables	206	241	279	289	299	3.5%
Processed Meat and Seafood	4,973	5,545	6,021	6,339	6,713	5.9%
Ready Meals	557	669	796	884	985	11.4%
Rice, Pasta and Noodles	24,000	27,418	29,073	30,262	31,546	4.2%
Sauces, Dressings and Condiments	14,697	16,639.00	18,617	20,217	22,035	8.9%
Savory Snacks	7,162	7,925	8,777.77	9,679.85	10,827	11.9%
Spreads	145	158	170	183	198	7.9%
Sweet Biscuits, Snack Bars and Fruit Snacks	4,725	5,239	5,752	6,235	6,860	10.0%
Packaged Food	150,117	172,878	193,568	209,271	227,311	8.6%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

Ready Meals

In Vietnam, both sales volume and value of ready meals including shelf stable ready meals, chilled lunch kits, chilled pizza, chilled ready meals, dinner mixes, dried ready meals, frozen pizza, frozen ready meals, and prepared salads, and other ready meals, has been increasing in recent years (see Tables 13, 14). According to Euromonitor's survey, in 2016, ready meal retail value growth was at 11 percent and reached VND 985 billion and retail volume growth was at 9 percent and reached 14 TMT. Busier and modern lifestyles inhibiting cooking at home, increasing consumer demand, and higher incomes continue to drive the tendency of using more ready meals in Vietnam, especially in big cities such as Ho Chi Minh City and Hanoi. More Vietnamese consumers such as students and office employees have less time to cook and want to use more ready meals. Many consumers believe that ready meals manufactured by big companies have better standards of food safety and hygiene than independent foodservice outlets, particularly small ones and street vendors due to many food scandals, negative rumors about food safety, and low hygiene standards.

In 2016, independent, small grocers remained the leading distribution channel for ready meals, while modern channels such as convenience stores, supermarkets, and hypermarkets are beginning to play a more important role.

Overall, ready meals face tough competition from fresh meals offered by foodservice outlets, supermarkets, and hypermarkets. The product portfolio of ready meals is still not diverse compared to fresh meals offered through these channels.

Table 13: Sales Volume of Ready Meals by Category (2012-2016)

Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Shelf Stable Ready Meals	7,310	8,300	9,360	10,200	11,070	8.5%
Chilled Ready Meals	700	800	890	980	1,080	10.2%
Dried Ready Meals	1,000	1,250	1,620	1,850	2,090	12.9%
Ready Meals	9,020	10,340	11,870	13,030	14,230	9.2%

Source: Euromonitor International

Table 14: Sales Value of Ready Meals by Category (2012-2016)

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Shelf Stable Ready Meals	454	537	631	694	769	10.8%
Chilled Ready Meals	51	60	69	77	85	11.5%
Dried Ready Meals	52	72	97	114	131	15.0%
Ready Meals	557	669	796	884	985	11.4%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

Processed Meat and Seafood Products

Frozen processed meat and seafood products continued to grow in 2016. Shelf stable processed meat and seafood still occupies a wide product range in retailers, and distribution networks covering both traditional and modern outlets. Shelf stable products maintained their popularity, despite consumers becoming warier of preservatives. As frozen and chilled products require freezers and refrigerators for storage, shelf stable meat and seafood are more easily stored. Growth of chilled processed meat and seafood was boosted by the increasing influence of Western cuisine, as more consumers were willing to spend on imported sausage, ham, and smoked meat; however, chilled processed meat and seafood were still emerging formats in Vietnam in 2016, with limited options and brands in-store.

Table 15: Sales Volume of Processed Meat and Seafood by Category (2012-2016)

Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Processed Meat	20,780	22,120	23,010	23,600	24,160	2.4%
- Shelf Stable Meat	14,550	14,920	15,190	15,460	15,710	1.6%
- Chilled Processed Meat	5,660	6,610	7,210	7,510	7,810	3.9%
- Frozen Processed Meat	560	590	610	630	650	3.2%
Processed Seafood	28,920	31,350	33,790	36,120	38,510	6.6%
- Shelf Stable Seafood	16,500	17,890	19,350	20,860	22,430	7.5%
- Chilled Processed Seafood	380	400	430	460	490	6.5%
- Frozen Processed Seafood	12,040	13,060	14,000	14,800	15,600	5.4%
Processed Meat and Seafood	49,700	53,470	56,800	59,720	62,680	4.9%

Source: Euromonitor International

Table 16: Sales Value of Processed Meat and Seafood by Category (2012-2016)

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Processed Meat	2,570	2,827	2,974	3,068	3,184	3.8%
- Shelf Stable Meat	1,670	1,778	1,829	1,872	1,930	3.1%
- Chilled Processed Meat	751	891	980	1,027	1,079	5.0%
- Frozen Processed Meat	148	158	164	169	176	3.9%
Processed Seafood	2,403	2,718	3,047	3,271	3,529	7.9%
- Shelf Stable Seafood	1,134	1,299	1,499	1,627	1,773	9.0%
- Chilled Processed Seafood	56	64	72	77	83	7.8%
- Frozen Processed Seafood	1,213	1,355	1,476	1,567	1,673	6.7%
Processed Meat and Seafood	4,973	5,545	6,021	6,339	6,713	5.9%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

Sauces, Dressings and Condiments

Sauces, dressings, and condiments record a current retail value growth of 9 percent, reaching VND22.0 trillion (about US\$ 968 million) and a retail volume growth of 6 percent to reach 479,000 MT in 2016.

Rising demand for traditionally-made fish sauce is an indicator of consumer interest in healthier products. Salad dressings register the strongest current retail value growth of 23 percent in 2016. Increased exposure to Western culture and cuisine is a key driver supporting the growth of salad dressings. Western-originated sauces such as mustard, mayonnaise, and ketchup registered the strongest growth within table sauces, compared to traditionally familiar products such as soy sauce, chili sauce, and fish sauce.

The presence of unpackaged and unbranded products in the categories such as chili sauces, herbs and spices, and pickled products, was strong thanks to their availability through most traditional channels across the country. Furthermore, these products typically have more affordable prices. However, the competition from these products gradually weakened as the increasing consumer concern for food safety and hygiene caused a steady shift to packaged products, especially in big cities such as Ho Chi Minh City and Hanoi.

Table 17: Sales Volume of Sauces, Dressings and Condiments by Category (2012-2016)

Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Cooking Ingredients	67,580	69,460	72,780	76,340	80,370	5.3%
- Bouillon	33,420	37,100	41,060	45,250	49,550	9.5%
- Dry Sauces	2,610	3,060	3,580	4,120	4,690	13.8%
- Herbs and Spices	160	180	190	210	230	9.5%
- Monosodium Glutamate	30,080	27,670	26,290	24,840	23,700	-4.6%
- Pasta Sauces	260	290	320	390	460	17.9%
- Cooking Sauces	1,060	1,170	1,330	1,530	1,740	13.7%
Pickled Products	3,560	3,890	4,240	4,580	4,930	7.6%
Table Sauces	309,600	329,870	350,580	371,750	393,330	5.8%
- Fish Sauces	212,060	226,470	240,970	255,670	270,750	5.9%
- Ketchup	1,650	1,850	2,070	2,310	2,560	10.8%
- Mayonnaise	1,050	1,190	1,350	1,540	1,710	11.0%
- Mustard	70	70	70	80	90	12.5%
- Oyster Sauces	2,860	3,070	3,290	3,520	3,760	6.8%
- Salad Dressings	-	70	120	140	170	21.4%
- Soy Sauces	71,130	74,900	78,720	82,500	86,220	4.5%
- Chili Sauces	20,780	22,230	23,980	25,990	28,070	8.0%
Sauces, Dressings and Condiments	380,750	403,220	427,590	452,670	478,630	5.7%

Source: Euromonitor International

Table 18: Sales Value of Sauces, Dressings and Condiments by Category (2012-2016)

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Cooking Ingredients	4,132	4,498	4,934	5,388	5,896	9.4%
- Bouillon	2,192	2,557	2,954	3,353	3,789	12.9%
- Dry Sauces	200	243	294	353	409	16.0%
- Herbs and Spices	83	96	110	126	142	12.9%
- Monosodium Glutamate	1,563	1,489	1,440	1,397	1,369	-2.0%
- Pasta Sauces	23	27	32	39	47	20.9%
- Cooking Sauces	72	85	104	121	141	16.5%
Pickled Products	197	228	265	289	316	9.5%

Table Sauces	10,368	11,913	13,418	14,540	15,823	8.8%
- Fish Sauces	7,784.02	8,944.98	10,035	10,838	11,759	8.5%
- Ketchup	93	109	128	145	165	13.5%
- Mayonnaise	103	123	147	167	191	14.5%
- Mustard	7.21	7.80	8.53	10	11	16.0%
- Oyster Sauces	135	156	179	200	223	11.5%
- Salad Dressings	-	23	37	46	57	23.0%
- Soy Sauces	1,501	1,703	1,910	2,063	2,248	9.0%
- Chili Sauces	745	846	974	1,071	1,168	8.9%
Sauces, Dressings and Condiments	14,697	16,639	18,617	20,217	22,035	8.9%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

Sweet Biscuits, Snack Bars, and Fruit Snacks

During 2016, sweet biscuits, snack bars, and fruit snacks continued to rise in sales value due to increasing consumer demand for these products as gifts. Dried fruit recorded the fastest current value growth in the category in 2016, increasing by 15 percent. Indeed, many Vietnamese consumers perceive dried fruit to be healthier than other products. Those who are particularly concerned about their sugar intake tend to prefer dried fruit over other types of sweet snacks such as sweet biscuits. Despite rising health consciousness, consumer demand for sugar-free and diet biscuits remained insignificant. Many Vietnamese consumers have simply stopped eating biscuits rather than turning to sugar-free or diet biscuits.

Table 19: Sales Volume of Sweet Biscuits, Snack Bars, and Fruit Snacks by Category Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Fruit Snacks	1,370	1,530	1,690	1,860	2,040	9.7%
- Dried Fruit	1,370	1,530	1,690	1,860	2,040	9.7%
Sweet Biscuits	69,160	75,300	81,690	88,400	95,390	7.9%
- Chocolate Coated Biscuits	590	630	680	730	790	8.2%
- Cookies	5,670	6,110	6,570	7,040	7,530	6.9%
- Filled Biscuits	21,640	23,560	25,610	27,750	29,970	8.0%
- Plain Biscuits	23,400	25,530	27,710	30,010	32,400	7.9%
- Wafers	17,860	19,460	21,120	22,870	24,700	8.0%
Sweet Biscuits, Snack Bars and Fruit Snacks	70,530	76,820	83,380	90,260	97,420	7.9%

Source: Euromonitor International

Table 20: Sales Value of Sweet Biscuits, Snack Bars, and Fruit Snacks by Category

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Fruit Snacks	217	257	293	332	381	14.6%
- Dried Fruit	217	257	293	332	381	14.6%
Sweet Biscuits	4,509	4,982	5,458	5,903	6,479	9.8%
- Chocolate Coated Biscuits	115	128	142	159	178	12.2%
- Cookies	469	525	578	620	681	9.8%
- Filled Biscuits	1,255	1,382	1,516	1,639	1,790	9.2%
- Plain Biscuits	1,770	1,970	2,156	2,318	2,530	9.2%

- Wafers	900	976	1,066	1,167	1,300	11.4%
Sweet Biscuits, Snack Bars, Fruit Snacks	4,725	5,239	5,752	6,235	6,860	10.0%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

Rice noodles, Pasta, and other Noodles

In 2016, rice noodles, pasta, and other noodles grew 4.2 percent. The decline posted by instant noodles, heavily affected overall performance in the category. Many Vietnamese believe that instant noodles are not good for health and wellness as they could cause obesity, increase aging, and have a negative impact on the stomach and digestion. Consequently, many consumers have started to consume lower amounts of instant noodles despite their busier lifestyles, opting for other meal substitutes instead. Rice noodles continued to increase in 2016 by 18 percent. Many consumers switched from unpackaged to packaged rice noodles, choosing to purchase brands by trusted companies known to strictly follow food safety and hygiene standards and be able to provide consumers with more reliable information on their production processes.

Table 21: Sales Volume of Rice noodles, Pasta, and other Noodles by Category

Unit: tons

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Noodles	395,250	410,680	405,760	396,370	385,520	-2.7%
- Instant Noodles	387,610	401,970	395,790	385,490	373,660	-3%
- Plain Noodles	7,640	8,710	9,970	10,880	11,860	9%
Pasta	3,260	3,620	4,030	4,470	4,920	10%
Rice noodles	282,480	347,710	443,910	529,200	612,000	15.6%
Rice noodles, Pasta and other Noodles	680,990	762,010	853,700	930,040	1,002,440	7.8%

Source: Euromonitor International

Table 22: Sales Value of Rice noodles, Pasta, and other Noodles by Category

Unit: VND billion

	2012	2013	2014	2015	2016	Change of 2016 vs 2015 (%)
Noodles	19,701	21,976	22,026	21,689	21,445	-1.1%
- Instant Noodles	19,415	21,635	21,618	21,243	20,957	-1.3%
- Plain Noodles	286	341	407.54	445	488	9.5%
Pasta	178	210	246	275	309	12.4%
Rice noodles	4,121	5,233	6,802	8,298	9,792	17.9%
Rice noodles, Pasta and other Noodles	24,000	27,418	29,073	30,262	31,546	4.2%

Source: Euromonitor International

Exchange rate: VND 22,745/USD (Vietcombank as of December 27, 2017)

SECTION III: COMPETITION

The biggest competitors for U.S. food processing ingredients are China, other ASEAN countries, Australia, and countries from the Eurasia Economic Union, and for select products, the local food industry. U.S. exporters should understand that Vietnam's domestic food ingredient production already

offers many products at competitive prices. Leading multinational food processors have established food processing operations in Vietnam and are able to offer a range of western-style products at reasonable prices. In addition, 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.

Most products from China, other ASEAN countries, Australia, and countries from the Eurasia Economic Union also enjoy lower tariffs than U.S. products. Currently, Vietnam is in the process of negotiating several FTAs, including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and an FTA with the EU. These FTAs with other trading partners will put U.S. agricultural exports at a disadvantage.

In addition to the freight cost advantages from ASEAN countries, 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.

Table 23: Competition in Major Product Categories

Product Category	Vietnam’s Net imports		Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
	(In U.S. \$)	U.S. share			
Total Fish and seafood products (HS codes 03, and 16)	U.S.\$5,132 million (2016)	2.3% (2016)	India, Ecuador, Australia, Hong Kong, Norway, Indonesia, Thailand, Japan, Iran, Malaysia, Denmark, China, South Korea, Canada.	Large volume of fresh live crustaceans, mollusk, frozen fish and other products from India, Ecuador, Australia, and Hong Kong; Short transportation time from India, Australia, Hong Kong, Indonesia, Thailand, Japan, South Korea, Malaysia and China to Vietnam compared to the U.S. Good quality shrimp imported from Japan; Good quality salmon from Norway; Many high quality seafood products such as tuna,	Local production is large. However, increasing domestic market and export markets require more materials for production.
	U.S.\$132.4 million (2015)	3.2% (2015)			
	U.S.\$123.6 million (2014)	2.4% (2014)			

				grouper, and salmon imported from Australia for increasing domestic consumption	
Total Meat and Poultry products (HS codes 02; 1601 and 1602)	U.S.\$3,314 million (2016) ----- U.S.\$4,175 million (2015) ----- U.S.\$3,706 million (2014)	3.8% (2016) ----- 2.8% (2015) ----- 2.6% (2014)	India, Hong Kong United States, Australia, South Korea	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 (HS code 0801; 0802)	U.S.\$2,434 million (2016) ----- U.S.\$1,548million (2015) ----- U.S.\$1,346million (2014)	13.6% (2016) ----- 17.5% (2015) ----- 21.2% (2014)	Hong Kong Ghana, Cote d'Ivoire, United States, Iran Indonesia Mexico	Availability of imported tree nuts for local production and exports;	Excluding cashew production, Vietnam is not a major producer of tree nuts
Fresh Fruits and Vegetables (HS codes 0803; 0804; 0805; 080610; 0807;0808; 0809; 0810; 0701; 0702; 0703; 0704; 0705; 0706; 0707; 0708; 0709)	U.S.\$2,152 million (2016) ----- U.S.\$1,807 million (2015) ----- U.S.\$1,527 million (2014)	3.1% (2016) ----- 3.3% (2015) ----- 6% (2014)	China, Thailand, United States, Iran, New Zealand, Australia, South Africa, South Korea, Canada, Hong Kong	Chinese fresh fruit are low priced, and are traded though the land border, usually avoiding customs formalities. Fresh fruit from Thailand, United States, Australia, New Zealand, and South Africa have a wide range of varieties, which meet market demands.	Local production of tropical fruits is large. Most imported fruit are temperate climate fruit
Processed Fruit and Vegetables (HS codes 0710; 0711; 0712; 0714; 080620; 0811; 0812; 0813; 0814; 1105; 1106; 2001; 2002; 2004; 2005; 2006; 2007; 2008)	U.S.\$1,282 million (2016) ----- U.S.\$1,194 million (2015) ----- U.S.\$1,002 million (2014)	3.2% (2016) ----- 2.8% (2015) ----- 3.3% (2014)	China, Thailand, United States, Hong Kong	Low cost of imported products from China; Good quality and safety of imported products from Thailand, Hong Kong, and United States.	More and more availability of processed fruit and vegetable products
Wheat (HS code 1001)	U.S.\$771.5 million (2016)	1.2% (2016)	Australia, Romania, Argentina,	Good quality, short transportation time and duty free of	No local production of wheat vs

	<p>----- U.S.\$564.6 million (2015) ----- U.S.\$567.3million (2014)</p>	<p>----- 1.1% (2015) ----- 0.9% (2014)</p>	<p>United States, Brazil</p>	<p>imported wheat from Australia.</p> <p>Zero import duty under Eurasia Economic Union Free Trade Agreement (VN-EAEU FTA) for imported wheat from Romania.</p> <p>U.S. wheat is consistent in high quality.</p> <p>Reasonable cost of imported wheat from Argentina</p>	<p>increasing demand of local bakery industry in Vietnam</p>
<p>Animal and Vegetable Oils and Fats (HS code 15)</p>	<p>U.S.\$689.3 million (2016) ----- U.S.\$615.9 million (2015) ----- U.S.\$747.5 million (2014)</p>	<p>1.2% (2016) ----- 1.1% (2015) ----- 0.9% (2014)</p>	<p>Malaysia, Indonesia, Argentina, China, Chile, Taiwan, United States</p>	<p>Malaysia, Indonesia enjoy ASEAN import tariff for vegetable oils</p>	<p>Local production of raw materials is inadequate.</p> <p>Vietnam's vegetable oil industry realizes much on imported raw materials</p>
<p>Prepared food products (HS codes 190120; 190219; 190230; 190590; 200811; 210410; 210690)</p>	<p>U.S.\$583.1 million (2016) ----- U.S.\$495.9 million (2015) ----- U.S.\$509.2 million (2014)</p>	<p>8.9% (2016) ----- 8.4% (2015) ----- 11.3% (2014)</p>	<p>Singapore, Thailand, Malaysia, United States, Indonesia, South Korea, Netherlands, China, Taiwan, Japan.</p>	<p>Singapore, Thailand, Malaysia, Indonesia enjoy ASEAN import tariff for prepared food products</p> <p>Good quality of prepared food from United States</p>	<p>More and more availability of locally produced prepared food products in Vietnam.</p>
<p>Soybeans (HS code 1201)</p>	<p>U.S.\$524.5 million (2016) ----- U.S.\$596.2 million (2015) ----- U.S.\$714.7 million (2014)</p>	<p>65.3% (2016) ----- 44.5% (2015) ----- 48.1% (2014)</p>	<p>United States, Brazil, Canada, Paraguay, Argentina</p>	<p>Brazil is major competitive supplier of soybeans with competitive prices.</p> <p>U.S. soybeans are consistent in good quality.</p>	<p>Local production is inadequate.</p> <p>Local food processors have been using imported soybeans and soy flour.</p>
<p>Dairy products (HS codes 0401; 0402; 0403; 0404;</p>	<p>U.S.\$512.2 million (2016) -----</p>	<p>21.5% (2016)</p>	<p>New Zealand, United</p>	<p>New Zealand, Australia and EU are competitive</p>	<p>Local production is inadequate.</p>

0405; 0406; 170211; 170219; 2105; 3501; 350220; 350710)	U.S.\$597.8 million (2015) ----- U.S.\$734.2 million (2014)	----- 26.7% (2015) ----- 34.3% (2014)	States, Australia, EU	suppliers of milk powder along with the United States. Australia is a competitive supplier of fresh milk products. EU is a prominent supplier of artisan cheese products. U.S. dairy products are consistent in good quality.	Many local dairy processors rely on imports of ingredients.
Peanuts (HS code 1202)	U.S.\$250.7 million (2016) ----- U.S.\$139.1million (2015) ----- U.S.\$171.8 million (2014)	24.7% (2016) ----- 17.2% (2015) ----- 2.3% (2014)	India, United States, Senegal, Brazil, Hong Kong, Argentina,	Very competitively priced of imported products from India, Senegal. Availability of imported peanuts from other countries for snack industry in Vietnam.	Local production is inadequate to meet domestic consumption and export demand. Vietnamese consumers' preference to taste and small size of locally produced peanuts. Many local food processors rely on imports of ingredients.
Snack Foods (excluding nuts) (HS codes 1704; 180620; 180631; 180632; 180690; 190510; 190520; 190530; 190531; 190532; 190540)	U.S.\$212.5 million (2016) ----- U.S.\$175.1million (2015) ----- U.S.\$212.5 million (2014)	7.2% (2016) ----- 5.6% (2015) ----- 5.4% (2014)	Indonesia Malaysia Thailand, United States, Singapore.	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
Sugar/Sweetener/ Beverage Bases (HS code 0409; 1701; 1702; 1703)	U.S.\$203.1million (2016) ----- U.S.\$184.2million (2015) ----- U.S.\$114.7 million (2014)	3.8% (2016) ----- 3.5% (2015) ----- 6.5% (2014)	Thailand, China, South Korea, United States, Indonesia, Malaysia.	Low cost of imported material (sugar) from Thailand, China. Free import tariff from Thailand, China, South Korea, Indonesia and Malaysia	High cost of locally produced products in Vietnam

				Low import tariff from India	
Pulses (HS code 0713)	U.S.\$129.4 million (2016) ----- U.S.\$136.6million (2015) ----- U.S.\$103.8 million (2014)	0.6% (2016) ----- 5.5% (2015) ----- 12.6% (2014)	China, Australia, Thailand, Argentina, Indonesia, South Africa, United States.	Availability of imported pulses from other countries for snack industry in Vietnam. Low cost of imported products from China.	Negligible local production of pulses.
Roasted Coffee & Tea products (HS codes 090121; 090122; 090210; 090220)	U.S.\$129 million (2016) ----- U.S.\$69.4million (2015) ----- U.S.\$45.3 million (2014)	0.4% (2016) ----- 0.7% (2015) ----- 1.7% (2014)	China (79%) Indonesia South Korea Hong Kong Japan Malaysia Italy Thailand	Low cost of imported products from China.	Big local production in Vietnam, good tastes, good marketing campaigns from local producers
Wine & Beer products (HS codes 2203; 2204; 2205)	U.S.\$117.9 million (2016) ----- U.S.\$171.3million (2015) ----- U.S.\$147.6 million (2014)	8.4% (2016) ----- 7.2% (2015) ----- 13% (2014)	Malaysia, France, Singapore, Chile, Hong Kong, United States, Italy, Netherlands, Belgium, Australia, Spain, Germany, Thailand, Czech, Argentina	Low import tariff from Malaysia Good taste of imported products other countries	Big local beer production in Vietnam, good tastes, good marketing campaigns from local producers Negligible local wine production and not preferable taste of locally wine products.
Milling Products, wheat flour, potato flour, starch (HS codes 1101; 1102; 1105; 1106; 1108; 1109)	U.S.\$93.1million (2016) ----- U.S.\$69.4million (2015) ----- U.S.\$89.3 million (2014)	0.2% (2016) ----- 1.9% (2015) ----- 4.6% (2014)	China, Poland, Thailand, Belgium, Germany.	Low cost of imported material from China Thailand. Good quality of imported products from European countries for confectionary industry	Local production is increasing to meet domestic consumption
Condiments & sauces (HS code 2103)	U.S.\$59.6million (2016) ----- U.S.\$50.2 million (2015) -----	2.1% (2016) ----- 3.2% (2015) -----	Thailand, China, Malaysia, South Korea, Singapore, Hong Kong	Very competitively priced of imported products ASEAN countries and China. Good quality and taste of imported	More and more availability of locally produced condiment and source products in Vietnam.

	U.S.\$35 million (2014)	----- 3.6% (2014)	Japan, United States.	products from South Korea, Japan and United States.	
Chocolate and Cocoa products (HS codes 1803; 1805; 1806)	U.S.\$57.7million (2016) ----- U.S.\$43 million (2015) ----- U.S.\$43.6 million (2014)	23% (2016) ----- 16% (2015) ----- 18% (2014)	United States, Malaysia, Singapore, Indonesia, Germany, India, China, Belgium.	Good quality of imported products from United States	More and more availability of locally produced chocolate and cocoa products.
Fruit and Vegetable Juices (HS code 2009)	U.S.\$20.2 million (2016) ----- U.S.\$14.4million (2015) ----- U.S.\$11.3 million (2014)	5.2% (2016) ----- 5.5% (2015) ----- 12.6% (2014)	Thailand, China, Brazil, South Africa, United States, Spain, Malaysia, Taiwan	Wide range of varieties of fruit and vegetable juices from Thailand, China, Brazil, South Africa, United States, Spain, Malaysia, and Taiwan, which meet market demands. ----- Very competitively priced of imported products from Thailand, China.	More and more availability of local fruit and vegetable juices products
Breakfast Cereals/Pancake Mix (HS codes 1904)	U.S.\$9.1 million (2016) ----- U.S.\$8.2 million (2015) ----- U.S.\$9.3 million (2014)	2.2% (2016) ----- 2.3% (2015) ----- 2.3% (2014)	Thailand, Malaysia, China, Japan, South Korea, Germany, Philippines, Indonesia.	Very competitively priced of imported products ASEAN countries and China. Good quality and taste of imported products from Germany	More and more availability of locally produced products in Vietnam

Source: GTA

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 Vietnamese market, soybeans, fish products, tree nuts, dairy products, soy flour, poultry meat and products, beef and beef products, fresh fruits, prepared food, processed fruit, and non-alcoholic beverage (excluding juices) continue to have good sales potential in Vietnam (see Table 24).

Table 24: U.S. food ingredient exports to Vietnam

Unit: Thousands of US dollars

Product (per HS code)	2012	2013	2014	2015	2016
Soybeans	333,204	317,829	339,748	264,613	341,015
1201900095 - SOYBEAN,OTHER	0	316,275	332,284	253,684	339,464
1201900005 - SOYBEAN,OIL STOK	0	1,554	7,464	10,929	1,551
1201000040 - SOYBEANS,EX SEED	351	0	0	0	0
1201900000 - SOYBEANS,EX SEED	332,853	0	0	0	0
Fish Products	33,458	35,185	105,333	115,296	102,872
0307710050 - GEO CLAM L/FR/CH	270	3,664	41,757	31,260	21,636
0306220000 - LOBSTERS,FR/CH	2,534	1,583	14,139	28,511	19,475
0307490022 - LOLIGO SQUID OPA	748	481	453	344	5,650
0306110020 - ROCK LOBSTER FZ	46	2,733	5,985	5,962	5,198
0306170040 - SH/PR PLD FZ NES	79	319	254	3,650	4,316
1605301020 - LOBSTER, IN AIRT	0	13	29	1,000	4,214
0307810000 - ABALONE LIVE/F/C	0	0	0	0	3,866
0307290000 - SCLLPS INC QUEEN	244	264	308	1,349	3,856
0306244000 - CRABS NESOI	14	0	66	3,508	3,372
0307490029 - LOLIGO SQUID NES	420	99	289	68	2,770
0306260000 - CW SHP/PRN FR/CH	1,735	3,318	4,694	4,063	2,686
0303830000 - TOTHSFHZ FZ EXFLR	0	0	0	2,618	1,892
1605211025 - SHRMP/PRWN,PR,FZ	126	39	2,607	2,143	1,869
0303410000 - ALBACORE TUNA FZ	331	233	0	1,993	1,454
0303110000 - SCKY SLMN FZ NES	192	0	578	1,195	1,447
1605102030 - DUN CRABMEAT PRE	55	12	158	1,289	1,219
0302310000 - ALBACORE,ETC,F/C	0	826	687	1,978	1,185
0304620000 - CATFISH FIL FRZ	509	825	79	853	1,133
0306110010 - CARIB SPN LOB FZ	0	13	427	256	1,114
0307910130 - CONCH,L,FR,CH	342	2,018	1,490	1,417	1,089
0303510000 - HERRING,FRZ	420	1,223	1,122	513	1,058
0306120000 - LOBSTERS, FROZEN	1,869	3,025	7,143	4,022	997
0306170024 - SH/P=133-154 NES	0	0	90	0	928
0303120022 - CHUM SLMN FZ NES	481	0	0	56	814
0306270000 - SHP/PR FCDSB NES	242	137	260	122	775
0306144020 - SNOW CRAB FZ	634	1,111	1,507	1,987	670
0306170003 - SHR/PRN<33KG NES	250	357	391	1,572	617
0308190000 - SEA CUC FZ/DSB	62	1,504	644	728	579
2104100040 - SOUPS/BROTHS/PRE	0	0	302	701	543
0306144030 - DUNGENSS CRAB FZ	7	0	929	42	480
0303310030 - TURBOT GRN FZ NS	903	112	433	391	472
0303896195 - FISH NES FZ	1,817	770	420	273	454
0303890061 - SABLEFISH FROZEN	489	65	10	69	432
0304610000 - TILAPIA FIL FRZ	26	34	96	374	400
0307490024 - LOLIGO SQUID PEA	0	43	729	246	400
0303630000 - COD EX,F,L,R,FRZ	0	98	486	440	371
0306160003 - CDWT SH/PR<33KG	594	1,202	300	10	309
1605102040 - CRABMEAT,PRE,NES	617	0	0	0	243
0303390130 - YFIN SOLE,FZ	0	0	0	0	205
0307990100 - MOL NES FZ/DSB	1,282	927	103	442	167
0303120062 - PAC SLMN FZ NES	0	0	0	0	157
0304890000 - FSH FIL NES FZ	385	641	85	0	156
1605301040 - LOBST,PREP,PRES	0	0	0	0	138
0303840000 - SEA BASS FROZEN	3	47	86	61	126
0306142000 - CRABMEAT FZ	919	322	121	283	120
0306160012 - CW SHP/PRN=56-66	236	0	0	0	120
0303130000 - AT/DNB SALM FZ	72	3	0	23	111

0307110040 - OYSTR N SD,L/F/C	0	0	492	0	105
1604206000 - FISH, PREPARED O	0	0	0	0	100
0302140062 - AD SMN FR/CH NES	0	0	0	0	99
1605291045 - SH/PR N FZAT NES	55	0	0	148	96
1603009500 - EXT/JUICES,FISH	0	0	0	115	86
0303904095 - FISH LIVERS/ROES	0	36	25	0	86
0303340000 - TURBOT NES FZ	0	0	0	75	81
0303120032 - PINK SLMN FZ NES	190	332	1,153	2,684	74
0303670000 - AK POL FZ EXFLR	0	80	0	0	65
1605690000 - A INVR NES PR/PR	0	0	0	0	63
0303896150 - OCEAN PERCH FZ	0	0	33	0	60
0306160021 - CW SH/PR=111-132	0	0	0	0	57
0305590000 - FISH,DRD,NOT SMK	0	0	0	0	50
0304991130 - SURIMI AK POL FZ	0	0	130	0	50
0303230000 - TILAPIA ORCMS FZ	0	0	0	0	40
0307210000 - SCALLOPS,L,FR,CH	0	0	0	0	38
0307600000 - SNAILS NESOI	0	0	0	0	37
0304839000 - F FSH N H FIL FZ	4	0	0	0	35
0307390000 - MSSLS,FZ,DRD,SLT	0	0	0	0	35
0308300000 - JELLYFISH	614	1,503	24	0	34
1605520000 - SCLP,PREP,PRES	0	0	0	66	33
0304870000 - TUAN EUTH FIL/FZ	230	487	158	54	30
0304310000 - TILAPIA FIL F/C	0	0	0	0	30
0303890040 - TILAP N ORCMS FZ	0	0	0	0	24
0307590000 - OCTOPUS,FR/DR/ST	64	63	0	0	23
0302710000 - TILAPIA FR/CH	0	0	0	0	22
0303660000 - WHITING,HAKE,FRZ	0	0	0	0	20
0307790030 - GEO DUCK CLAM FZ	0	0	0	76	19
0303120052 - COHO SLMN FZ NES	0	0	0	0	18
0305410000 - P,A,D,SALMON SMK	0	0	0	6	14
0304410000 - SALM A/P FIL F/C	0	0	0	0	14
0302110010 - TROUT RNBW FMD	0	0	0	0	13
0307790090 - CKL A SHL FZ/DSB	184	217	261	170	10
0304450000 - SWORDFSH FIL F/C	0	0	0	0	7
0302140003 - ATL SALMON FRMD	0	0	0	0	6
0303540000 - MACK X F/L/R FZ	0	101	0	37	6
1604200500 - PRODUCTS, MEAT C	0	0	0	0	6
0302320000 - YL FIN TUNA,FR/C	0	188	477	0	0
0302430000 - SARD X F,L&R F/C	97	19	0	0	0
0302893010 - SABLEFISH FR/CHL	53	0	382	0	0
0302897100 - FISH NES FR/CH	32	0	0	80	0
0302904010 - MUL RO FR/CLD	16	0	0	0	0
0303120012 - CHINOOK FZ NES	0	0	0	341	0
0303190100 - SALMONID FZ NES	0	10	51	338	0
0303240000 - CATFISH FZ	80	60	0	0	0
0303290100 - NIL PRCH SNHD FZ	0	0	14	0	0
0303310015 - HALIBUT FZ NES	0	7	132	0	0
0303330000 - SOLE,X F,L,R FRZ	0	0	3	0	0
0303390160 - FLAT FISH NES FZ	404	243	11	0	0
0303420000 - YELLOWFIN TUNA FZ	505	0	0	321	0
0303490200 - TUNA NES,FRZ	0	21	0	0	0
0303530000 - SARDINES FROZEN	88	0	0	0	0
0303810090 - SHARKS, FZ N DGF	71	0	0	0	0
0303820000 - RAYS/SKATES FZ	116	0	50	0	0

0303890046 - ATKA MACK, FZ	0	0	70	0	0
0303890049 - MULLET,FROZEN	14	0	0	0	0
0303890052 - MONKFSH,FZ	0	40	0	0	0
0303890055 - BUTTERFISH FRZ	0	0	55	0	0
0303904020 - HERRING ROE, FRZ	21	34	0	0	0
0303904040 - SALMON ROE, FROZ	134	0	0	8	0
0304590000 - FSH MEAT NES F/C	559	147	3	0	0
0304710000 - COD FILLETS FZ	0	144	0	0	0
0304750000 - FSH FILL,O MT FZ	0	0	0	3	0
0304790000 - BEGMM FIL NES FZ	0	864	958	45	0
0304810000 - SAL PAC FIL FZ	0	11	17	8	0
0304820000 - TROUT FIL FZ	0	0	0	11	0
0304835005 - HALIBUT FILL FZ	0	3	0	0	0
0304840000 - SWORDFISH FIL/FZ	0	0	0	55	0
0304930000 - TCCENPSH NES FZ	0	0	6	0	0
0304991190 - TUNA SJ O SBB FZ	0	0	0	39	0
0304999100 - OFSHM ESM NES FZ	45	71	0	18	0
0305100000 - FISH MEAL FIT FO	0	0	36	0	0
0305320000 - FIL BEGMM D/SLT	0	0	56	0	0
0305490002 - FH INC FIL,SM NS	0	0	0	486	0
0305610000 - HERRINGS, SALTED	20	46	0	0	0
0305690002 - FISH NESOI	0	13	0	0	0
0305720000 - FSH HD TAIL MAW	0	0	8	0	0
0306144010 - KING CRAB FZ	13	0	76	28	0
0306144090 - CRABS, FZ NES	0	0	72	293	0
0306160040 - CW SH/PR PLD FZ	0	0	0	59	0
0306170006 - SHR/PR=33-45 NES	584	6	198	538	0
0306170009 - SHP/PR=46-55 NES	0	0	116	149	0
0306170012 - SHP/PR=56-66 NES	0	0	84	0	0
0306170015 - SHP/PR=67-88 NES	136	168	48	0	0
0306170018 - SH/PR=89-110 NES	0	0	0	444	0
0306190092 - CRUSTCNS,NES,FRZ	0	10	636	9	0
0306210000 - ROCK LOBSTER, OT	12	0	0	0	0
0306290100 - CRUSTACEANS NES	42	0	230	477	0
0307190000 - OYSTR FZ/DR/SL/B	0	161	0	35	0
0307410040 - SQUID EXCEPT LOL	0	0	37	0	0
0307490010 - SQUID FILLETS FZ	802	44	40	65	0
0307490050 - SQUID EXP LOLIGO	1,015	63	137	25	0
0307710070 - CLAM,NGD L/FR/CH	0	0	81	0	0
0307790070 - CLAM,NOT GD FZ	0	25	1,180	0	0
0307890000 - ABALONE FZ/DSB	144	0	0	0	0
0307910190 - MOL NES LIVE/F/C	0	0	91	0	0
0308110000 - SEA CUC LIVE/F/C	0	0	0	55	0
1604160000 - ANCHOVIES, NOT M	222	0	0	137	0
1604197002 - FISH WHOLE/PIECE	0	22	0	22	0
1605100500 - CRAB PRODUCTS CO	36	0	0	0	0
1605102025 - SNOW CRABMEAT,PR	92	170	90	0	0
1605104005 - SN CRABMT,PRE/FZ	171	0	0	0	0
1605104020 - CRABMT,NES,PR,FZ	0	0	0	285	0
1605210500 - SHP/PRN PR N ATC	6,127	0	1,870	0	0
1605291025 - SHRMP/PRAWN,FZAT	0	0	0	360	0
1605400500 - CRUSTACEANS NESO	0	24	0	0	0
1605401000 - CRUST PREP,PRES	0	18	0	0	0
1605550000 - OCTO,PREP,PRES	0	117	0	0	0

1605560010 - CLAMS,PREP,PRES	136	0	0	0	0
1605580000 - SNAL NSNAL,PR,PR	1,094	1,326	172	0	0
1605590000 - MOL NES,PRE,PRE	282	162	18	0	0
1605610000 - SEA CUC,PRE,PRES	0	69	70	0	0
1605630000 - JLYFSH,PREP,PRES	0	0	6,225	1,320	0
Tree Nuts	162,212	236,732	286,000	272,301	331,262
0802110000 - ALMOND,FR/DR,N/S	41,191	52,602	60,071	68,351	134,001
0802310000 - WLNT,FR/DR/IN,SH	26,540	84,906	74,302	37,954	51,727
0802210000 - HZLNT/FLBRT,N/SH	18,832	18,466	24,332	46,369	46,954
0802901000 - PECANS,F/D,IN SH	67,966	32,381	87,553	45,821	33,466
0802510000 - PSTCHIO,F/D/N,SH	259	2,956	10,442	8,419	29,089
0802120000 - ALMDS,FR/DRD/SH	3,063	5,072	6,683	7,255	22,297
0802320000 - WALNUT,FR/DR/SHL	296	36,466	17,693	50,657	8,603
0802901500 - PECANS,FR/DR/SHL	0	37	1,272	1,215	2,412
0801320000 - CASHEW NUT, SHL	282	635	1,407	1,409	895
2008194000 - ALMONDS,PRE/PRS	3	6	380	1,473	803
0802520000 - PSTCHIO,F/DR/SHL	0	409	0	0	444
0802909602 - NUTS, NESOI, FRE	144	0	651	132	253
2008191040 - CASHEWS,PREP/PRS	976	413	0	148	102
2008193020 - PISTACHIOS PR/PS	0	131	195	377	94
0801310000 - CASHEW NUT, N/S	462	168	128	0	93
0801110000 - COCONUT, DRIED	0	0	0	0	17
0802220000 - HZLNT/FLBRT,SHL	0	0	0	9	11
0813500060 - MIXTURES OF NUTS	0	94	0	0	3
0801220000 - BRAZIL NUT, SHL	0	0	0	8	0
0802909202 - NUT,FR,DR,IN SHL	2,197	1,976	847	2,533	0
2008198500 - MIX NUTS,PR/PRES	0	0	7	162	0
2008199010 - MACADAMIA NT,P/P	0	0	14	6	0
2008199500 - NUTS/SEEDS,PR/PS	0	15	23	3	0
Dairy Products	139,684	240,769	263,684	168,347	119,666
0402100000 - NFDM,<1.5% FAT	74,614	135,597	128,583	89,037	57,512
0404104000 - WHEY, DRIED	12,065	10,110	11,856	7,874	10,952
1702110000 - LACT,ANH>99%SLD	4,325	6,230	7,222	6,077	10,626
0402990000 - MLK&CRM,CNTD SWT	1,854	38,159	4,126	3,197	6,455
1702190000 - LACT,SLD,NESOI	10,101	4,821	9,397	4,616	6,242
1901909500 - FD PR,FL/DARY/ST	4,221	2,242	1,635	6,182	5,910
0404100500 - WHEY PROT CONC	8,399	7,675	3,178	2,545	4,009
0404100850 - MOD WHEY NESOI	7,041	7,685	6,935	2,880	3,845
0404900000 - NAT MK PRO NESOI	501	1,265	2,680	2,578	1,915
3502200000 - ALB/MLK,WHEYPRCN	405	458	8,902	4,100	1,833
1901100000 - PREP,INF US 4RS	2,924	3,295	1,481	759	1,680
2105000010 - ICE CREAM	196	526	896	1,961	1,530
0401500000 - MLK&CRM,>10% FAT	14	325	302	609	1,034
0403900000 - BUTTERMILK	236	273	0	240	940
0406100000 - FRESH CHEESE	554	208	423	361	832
0402210000 - NFDM, >1.5% FAT	617	2,551	58,009	31,927	750
0401400000 - MLK&CRM,6-10%FAT	0	119	0	12	621
0402290000 - MLK&CRM,>1.5% FT	2,590	6,207	5,043	73	466
0406200000 - CHEESE ALL KINDS	27	100	13	418	395
0402910000 - MLK&CRM,CNTD NSW	0	30	421	305	351
0401200000 - MLK&CRM,<6% FAT	0	49	252	113	350
0401100000 - MLK&CRM,<1% FAT	597	7	10	7	348
0401201000 - MLK&CRM<6% ORG	0	0	0	0	235
0406300000 - CHEESE,PROCESSED	0	52	121	229	206

0406901000 - CHEESE, CHEDDAR	0	0	125	621	191
2202901500 - MLK-BASED DRINKS	1,605	999	1,646	503	180
1901903040 - ARTCLS OF MLK/CM	6,433	4,619	6,321	678	89
3501100000 - CASEIN	0	0	0	0	63
0401205000 - MLK&CRM,<6% OTH	0	0	0	0	52
0403100000 - YOGURT	101	92	69	63	33
0405100000 - BUTTER	3	6,740	1,912	4	17
0406909550 - CHEESE,INC MIXT	3	4	93	136	6
0404102000 - WHEY, FLUID	0	25	69	0	0
0405900000 - MLKFTS/OLS,NESOI	0	0	1,555	0	0
0406906500 - CHEESE, COLBY	0	0	187	0	0
1901903020 - MALTED MILK	0	19	0	0	0
3501906000 - CSNTS & CASEIN D	0	0	5	0	0
3507100000 - RENNET	0	0	3	0	0
9802100000 - FD PRDCTS RELIEF	258	288	214	240	0
Poultry Meat & Prods. (ex. eggs)	61,726	69,214	71,674	83,603	79,491
0207140010 - CKN LG QUART,FZN	44,871	35,142	36,796	41,136	34,037
0207140090 - CHK OTHER,FZN	4,266	4,120	10,429	18,159	19,583
0207140025 - CHK OTHER LEG,FZ	5,776	5,742	7,201	7,806	9,667
1602390025 - MLS/PRP,NTCKN/TK	94	34	4,970	3,748	8,345
1602320090 - PREP CKN, OTHER	1,665	1,690	1,794	2,391	2,058
0207140050 - CHK,OFL,EXLV,FZN	176	67	935	963	1,932
0207270050 - TRKY,OFFALS,FZN	0	20	58	31	940
0207140030 - CHKWINGS&OTH,FZN	1,679	17,776	7,922	2,614	678
0207120020 - CHCKNS,YNG,FR/CH	3	37	25	25	616
0207270090 - TRKY,OTHER	76	162	5	16	362
0207270045 - TRKY,BREAST,FZN	64	81	61	0	320
0207270030 - TRKY,WING,FZN	35	200	113	188	240
1602320020 - MLS/PREP,CHCKN	0	0	48	218	196
0207250000 - TURKEYS, FROZEN	52	82	43	47	125
0207270010 - TRKY,LEGSWBO,FZN	34	0	90	90	95
0207240000 - TURKEYS,FRSH,CHL	0	0	0	110	79
0207140045 - CHK,PAWS&FT,FZN	2,743	4,009	1,082	5,919	74
0207120040 - CHCKNS,NES FRZN	0	14	37	109	67
1601000020 - TRKY SASG,FRKS	0	0	24	3	37
1602320035 - CKN COMNUTED,MSC	23	0	0	11	22
1602310090 - PREP TRKY,OTHER	12	3	3	16	18
0207110020 - CHCKNS,YNG,FRZN	42	0	0	3	0
0207110040 - CHCKNS,NES FR,CH	13	0	0	0	0
0207130000 - CHCKN CTS FR/CH	0	5	29	0	0
0207270025 - TRKY,MDT,NOB,FZN	48	5	0	0	0
0207450000 - DUCK MT/OFL FRZ	0	5	7	0	0
1601000010 - CKN SASG,FRNKS	52	0	0	0	0
1602310020 - PREP MLS,TURKEY	0	20	3	0	0
Soybean Meal	59,990	201,226	181,011	138,804	74,132
1208100000 - SOY FLOUR, MEAL	15,549	131,329	173,469	131,435	67,225
2304000000 - SOYBEAN MEAL	44,441	69,898	7,542	7,370	6,908
Beef & Beef Products	160,707	26,628	22,137	32,265	39,906
0202306000 - BFWO/B, CRC,FRZ	93,276	14,667	17,973	26,188	33,857
0202206000 - BFW/B CRC,FRZ	54,469	8,734	2,914	3,789	4,126
0202303550 - BF PRSD WO/B FRZ	4,149	692	510	275	911
0201306000 - BFWO/B NPRSD F/C	1,241	702	199	434	420
0504000050 - BEEF TRIPE, FZ	287	0	280	968	186
0202203550 - BF PRSD W/B FRZ	920	692	131	521	174

0206290090 - BOV OFL,FZ,OTHER	488	44	0	14	102
0201303550 - BF PRSD WO/B,F/C	44	124	94	0	55
0206210000 - BOV TNGS,ED FRZ	11	0	29	9	26
0201206000 - BFW/B NTPRSD F/C	5,337	0	8	25	17
0504000070 - BF INT,FZ,X SSGC	61	545	0	26	15
0201203550 - BF PRSDW/B FR/CH	0	190	0	0	10
0206100000 - BOV OFL,ED,FR,CH	0	0	0	0	4
1602509500 - BEEF,PREP,PRES	332	0	0	0	3
0202100010 - CRC,1/2CRC VL FZ	0	0	0	14	0
0206290010 - BOV OFL,FZ,HEART	90	238	0	0	0
Fresh Fruit	37,850	60,219	91,080	58,955	66,933
0808100050 - APPLES FRESH	16,598	32,617	53,455	36,179	35,184
0806100050 - GRAPES FRESH	17,707	20,971	20,235	15,418	22,959
0809290050 - CHER N/SR FR	1,718	1,612	3,837	2,714	4,726
0805100065 - ORANGES NES FR/D	880	2,518	7,513	2,579	1,976
0808100010 - ORG APPLES FRESH	167	444	552	788	697
0806100010 - ORG GRAPES FRESH	43	84	19	65	597
0808300050 - PEARS, FRESH	158	512	235	371	336
0809210000 - SOUR CHERRY, FR	0	10	198	15	194
0805100020 - TEMPLES, FRESH	146	867	2,528	256	194
0809309000 - PEACH,NCTR NESOI	0	0	0	7	27
0809290010 - ORG CHER N/SR FR	5	0	0	4	22
0810205000 - BERRIES NESOI	0	0	0	0	13
0810600000 - DURIANS, FRESH	0	0	0	0	5
0810100050 - STRAWBERRIES FR	0	0	0	0	3
0805100045 - ORG ORANGES FR/D	226	166	258	84	0
0805502010 - ORG LEMONS FR/D	0	0	358	0	0
0805502050 - LEMONS FR/D	5	264	1,824	21	0
0805900100 - CITRS NES FRH/DR	57	125	0	91	0
0808300010 - ORG PEARS	0	17	0	0	0
0809100000 - APRICOTS, FRESH	0	0	0	26	0
0809300000 - PEACHES,NCTRNS,F	0	0	20	0	0
0809400000 - PLUMS,PRUNE,SL,F	0	4	10	8	0
0810202000 - ORG BERRIES	0	0	0	3	0
0810400029 - CULT BLUEBERS FR	0	0	0	22	0
0810500000 - KIWIFRUIT,FRESH	39	0	0	162	0
0810904500 - FRUITS, FRS, NES	98	9	37	144	0
Prepared Food	28,773	41,652	51,939	37,376	46,351
2106907090 - OTHER FOOD PREPS	23,550	30,169	39,395	25,512	31,984
2106906592 - OTH CAN FD PREPS	3,362	6,772	8,007	5,520	5,186
2008112000 - PEANUTS,BLANCHED	0	0	0	32	3,560
2008119000 - PNTS,PR/PS NES	0	466	3	196	2,308
2106907020 - OTH FD PRPS SUGR	77	1,201	1,151	3,546	1,790
2106905800 - GELATIN FD PREPS	151	122	337	1,362	756
1905909090 - PASTRY NESOI	374	582	339	91	254
2008111000 - PEANUT BUTTER	169	129	187	162	131
1901200025 - MIXES, DOUGHS	6	25	36	87	109
1902300060 - PASTA, NESOI	0	0	0	0	80
2106906595 - OTH FRZ FD PREPS	628	204	284	524	79
1901200005 - MIXES, DOUGHS	7	86	127	76	51
2104100060 - SOUP,BROTH,PREPS	31	28	31	24	43
2104100020 - SOUP,BROTH,DRIED	0	0	0	94	11
1901200015 - MIXES, DOUGHS	224	18	10	14	5
2106906580 - CRM/MLK SUB NES	141	1,850	1,251	90	3

1902192000 - PASTA NO EG	0	0	5	0	0
1902194000 - PASTA NO EGG NES	45	0	6	0	0
1902300020 - OTH PASTA,CANNED	0	0	3	0	0
2106906575 - CFFE WHIT,N-DARY	6	0	768	44	0
Non-Alcoholic Bev. (ex. juices)	8,650	12,366	18,379	42,477	47,418
2202909090 - OTH NONALC BEVRG	6,829	9,830	15,623	38,265	43,753
2101200020 - INSTANT TEA/MATE	384	686	1,205	1,858	1,750
2202100040 - OTH CARBNTD S/DR	353	369	330	436	802
2106906587 - HERBAL TEAS MIX	202	543	568	832	528
2101112941 - COF EXT/ESS, RET	189	152	0	74	164
2101112126 - INST COF NDEC RT	132	85	6	0	81
2202100020 - CARB S/DRK SWTNR	60	109	270	507	72
0902300000 - BLACK TEA FERMTD	0	53	47	26	68
0901210050 - COFFEE RST ND	18	242	72	262	68
2101112949 - COF EXT/ESS,OTH	0	71	51	62	50
2101200040 - TEA/MATE EXTRACT	21	0	58	39	44
2101120000 - COF BASED EST/ES	18	133	72	76	22
0901220000 - COFFEE,RSTD,DECF	0	3	3	0	12
0902200000 - GREEN TEA NESOI	428	0	0	11	3
0901210010 - ORG COFFE RST ND	0	0	57	0	0
0901902000 - COFFEE SUBSTITUT	18	91	0	0	0
0902100000 - GREEN TEA NT FER	0	0	11	21	0
0902400000 - BLACK TEA NESOI	0	0	5	8	0

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

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

Table 25 shows U.S. products not present in significant quantities, but which have good sales.

Due to Vietnamese Government's methyl bromide (MB) fumigation requirement for corn and wheat exported from the United States, U.S. corn and wheat export value in the period of January - September 2017 dropped significantly. However, since September 1, 2017, the GVN lifted the requirement of MB fumigation for U.S. corn. Local demand for corn for feed sector in Vietnam is increasing and U.S. Grain Council has been doing marketing activities to create potential opportunities for U.S. corn in the coming years.

Processed vegetables and chocolate and cocoa products also showed strong export growth rates in 2016. Other intermediate products, and sugar, sweeteners, and beverage bases also have good sales potential.

Table 25: U.S. potential food ingredient exports to Vietnam

Unit: Thousands of US dollars

Product (per HS code)	2012	2013	2014	2015	2016
Wheat	45,218	32,293	77,737	64,671	50,055
1001992055 - WHEAT X SD,DURUM	23,346	22,873	56,188	43,272	30,451
1001992015 - WHITE WHT X SD	13,238	5,952	19,328	16,444	19,373
1001190000 - DURUM WHT,X SD	8,634	3,468	2,222	4,955	231
Other Bulk Commodities	1,221	96,328	4,240	24,536	62,421
1202420040 - PEANUTS,SHELLED	32	45,031	1,425	15,721	34,734
1202410000 - PEANUTS, INSHELL	515	12,234	2,445	8,070	20,860
1202420020 - PNTS,SH,OILSTOCK	630	38,990	0	100	6,066
1008900120 - WILD RICE	0	0	123	413	283

1202300000 - PEANUT SEEDS	0	0	0	0	277
0901110000 - COFFEE, RAW	0	0	0	0	152
1008900140 - CEREALS, NESOI	44	47	82	29	32
1301900190 - NAT GUMS,RESINS	0	26	53	48	10
1008500000 - QUINOA	0	0	0	8	4
0901120000 - COFFEE,DEC/N RST	0	0	0	0	3
1008290000 - MILLET, EX SEED	0	0	112	147	0
Pulses	245	1,876	3,312	909	672
0713395120 - GRT NTHRN BEANS	0	0	0	0	390
0713104020 - GREEN PEAS, DRYD	40	97	404	185	251
0713395190 - BEANS, NESOI	0	0	0	0	21
0713202000 - CHICKPEAS,GRBNZO	205	139	15	19	7
0713402000 - LENTILS EX SD	0	0	3	4	3
0713335020 - DK RD KIDNEY BNS	0	0	0	18	0
0713909002 - LGMNCS VEG DRD	0	1,640	2,890	682	0
Corn	242	24,091	87,010	12,824	100,674
1005902030 - #2 CORN, EX SD	242	24,091	74,091	12,009	87,517
1005902035 - #3 CORN, EX SD	0	0	0	0	13,017
1005902070 - CORN,YELLOW,NES	0	0	0	0	139
1005902020 - #1 CORN, EX SD	0	0	51	0	0
1005904055 - CORN,WHITE,EX SD	0	0	0	815	0
1005904065 - CORN, NES	0	0	12,868	0	0
Processed Fruit	14,546	23,780	21,903	23,067	23,350
2008997550 - FT/ED,PL/PT,P/PS	6,325	11,178	10,920	12,659	9,035
0813200000 - PRUNES, DRIED	2,459	6,218	4,146	4,509	7,238
0806200000 - GRAPE DR,RAISINS	4,959	5,602	5,574	5,110	4,763
2008930000 - CRANBERY PRP/PRS	28	38	84	38	1,655
2008309000 - CTR FR,ETC,PR,PS	274	433	644	460	312
0813409600 - OTHER DRIED FRUT	97	0	0	5	101
0804100000 - DATES,FRSH/DRIED	108	118	101	121	82
2008600020 - CHRY,MRSNG,PR,PS	0	0	26	33	44
2008600040 - CHERRY,SWT,PR,PS	0	0	13	0	32
0811908040 - CHERRIES,SWT,FRZ	0	0	0	0	31
0811908060 - CHERRIES,TART,FZ	0	0	72	24	22
0811909000 - FRUIT/NUTS,NEC	31	45	63	0	8
0813500020 - MIXTURES DRY FRT	26	74	178	14	7
0813402010 - DRD WILD BLUEBRY	0	0	27	0	6
0813402020 - DRD CULT BLUEBRY	0	0	15	0	4
0813403010 - CHERRY, TART DRD	139	0	18	0	4
2008702000 - PEACHES, PR/PS	0	3	9	23	3
2007999000 - JAM/FR JELLY/MAR	12	0	0	0	3
0811200000 - BERRIES,FRZ,NEC	3	0	0	3	0
0811902024 - FRZ WILD BLUEBER	0	0	0	4	0
0811902028 - FRZ CULT BLUEBER	0	0	3	0	0
0812100000 - CHERRY,INED,PRES	0	41	0	0	0
0812908800 - FRT/NT PRV P NES	0	0	0	3	0
0813100000 - APRICOTS, DRIED	3	3	0	0	0
0813403090 - CHERRY, DRD OTHR	81	0	0	14	0
1211909300 - CERT PL CH FZ	0	0	0	0	0
1212993000 - APR/PEAC STN/KRN	0	5	0	0	0
2006005550 - FR/NUT/FR-PEEL,P	0	21	3	0	0
2007916000 - CT FRT JAM/JELLY	0	0	3	0	0
2007998000 - FR.NUT PASTE/PUR	0	0	0	4	0
2008800000 - STRAWBERRY,PR/PS	0	0	6	5	0

2008974000 - FRT MIX,P.PS,OTH	0	0	0	39	0
Chocolate & Cocoa Products	3,925	5,129	7,981	6,703	12,997
1806900093 - FD PREP/COC NRET	2,543	2,864	5,379	3,883	9,633
1806900073 - FD PREP/COC RETL	183	686	1,227	1,923	1,501
1806310080 - CH/COC<2KG FLNCN	0	30	8	25	839
1806321000 - CH/COC<2KG NFCON	417	474	413	262	251
1806900063 - CONF/COCO-RETAIL	635	795	788	392	250
1806209000 - COCOA PREP,BULK	77	48	33	118	245
1806323550 - CH/COC<25G NFNCN	0	69	8	0	108
1806310040 - CH/COC<2KG FLCON	55	12	6	18	76
1806900083 - CONF/COCO-NRETAL	0	22	0	0	68
1805000000 - COCOA PWDR,N SWT	9	31	31	46	15
1806100000 - COCOA PWDR,+ SWT	6	97	76	14	8
1806206000 - CNFTNR COAT/PROD	0	0	0	3	4
1803100000 - COCOA PSTE,N DEF	0	0	13	19	0
Processed Vegetables	3,463	6,223	7,916	6,995	9,965
2004108020 - POTATO,FR FRY,FZ	1,608	3,009	3,673	3,116	7,874
0710400000 - SWEET CORN,FRZ	279	634	914	1,628	777
2002900060 - TOMATO PASTE	114	115	112	218	314
2004108060 - POTATOES X FF FZ	10	54	56	169	280
2002900080 - TOMATO NES,PR/PS	0	0	0	0	166
2005996550 - VEGS INC MIX P/P	0	0	90	230	154
0712909002 - VEG NES/MX VG DR	0	0	126	98	119
2005800000 - SWEET CORN,PR/PS	66	23	44	63	87
0710220000 - BEANS,RAW COOKED	0	0	0	0	55
2005100000 - VEG HOMO,NT/FRZ	24	10	0	0	50
2004908580 - VEG IN MX P/P FZ	94	65	33	13	23
2005200070 - POTATO NES,P/PRS	28	45	62	209	13
0712390000 - MSHRM/TRF NES DR	0	0	4	28	11
2005200040 - POTATO GRANULES	16	823	530	598	10
2005512020 - COWPEAS CANNED	0	0	0	0	8
2002100000 - TOMATO,WHL/PCS P	0	0	4	11	7
2001100000 - CUCUMBERS,PR/PS	20	29	0	0	6
2005514040 - BEANS NES PR/PS	0	0	3	0	3
1105200000 - FLAKES OF POTATO	0	226	1,443	522	3
0710900000 - VEG MIXTURES	0	0	13	0	3
0710100000 - POTATOES FROZEN	0	0	17	0	0
0710800050 - OTHER FROZEN VEG	0	0	26	0	0
0711905500 - VEG, NES PRV PRS	17	0	0	0	0
0712204000 - ONIONS, DRIED	0	4	34	6	0
0712320000 - WOOD EARS, DRIED	0	6	0	0	0
0712903000 - POTATOES DRIED	0	0	6	0	0
0712904020 - GARLIC PWDR/FLR	0	3	0	0	0
1105100000 - POTATO,FL & MEAL	0	0	0	5	0
1106100000 - FL/ML,DR LEG VEG	38	0	0	0	0
1108190000 - STARCHES, NESOI	3	0	0	8	0
2001903400 - ONIONS,PREP/PRES	0	0	0	12	0
2003100100 - MSHRM,AGAR.PR/PS	0	19	0	0	0
2003900002 - MUSHRM TRF PR/PS	0	0	247	62	0
2004908540 - SW CORN,PR/PS,FZ	1,108	1,158	469	0	0
2005512040 - CWPEA,BL-EYE,SPP	0	0	4	0	0
2005590000 - BNS,N/S,PR/PS	38	0	0	0	0
2005700000 - OLIVES PREP/PRES	0	0	7	0	0
Wine & Beer	15,194	13,685	20,906	12,463	9,985

2204214000 - GRAPE WINE NESOI	4,476	3,878	5,683	9,047	8,742
2205100000 - VERMOUTH/GR WINE	6	21	67	0	543
2204217000 - GRAPE WINE NESOI	307	4,287	4,433	1,014	294
2204212000 - EFFRVSCENT WINE	90	61	98	0	177
2204290020 - GRAPE WINE NESOI	777	249	799	33	109
2205900000 - VERMOUTH/GR WINE	0	25	165	47	50
2203000000 - BEER/MALT	699	965	1,835	717	35
2206007000 - FERMENTED BEVERG	22	0	1,721	102	29
2204290040 - GRAPE WINE NESOI	8,813	4,199	6,099	1,502	6
2204100000 - SPARKLING WINE	3	0	5	0	0
Snack Foods NESOI	6,147	4,469	6,739	5,210	8,461
1905901041 - FRZ PSTRY	6	25	18	6	3,633
1005904049 - POPCORN,EX SEED	518	623	1,619	1,180	1,445
1905310000 - SWT BISCTS,FRZ	872	904	1,252	907	1,331
1704100000 - CHEWING GUM, WHE	47	84	339	1,952	602
2005200020 - POTATO CHIPS,P/P	3,702	2,471	1,967	466	539
1905909030 - CORN CHIPS AND S	212	182	272	290	441
1704903000 - CONFECT.SWEETMTS	16	13	40	127	213
1704907000 - SGR CONF W/O COC	294	55	211	110	177
2008199050 - POPCORN,MICROWAV	97	25	98	69	39
1905901049 - FRZ BREADS	239	12	10	14	29
1905901080 - BRD,OTR BAKED	9	7	0	0	6
1905901050 - SWT PSTY	0	0	0	0	5
1901902500 - BLENDED FD PRDTS	126	0	909	88	0
2106906585 - CONFECTIONERY	9	66	4	0	0
Pork & Pork Products	4,755	3,427	2,223	3,824	4,948
0203294000 - SWN MT, FRZ	2,434	2,367	969	1,944	2,110
0206490030 - SWN OFL,FZ,FEET	58	0	72	88	492
0203292000 - SWN MT,NE,PRC,FZ	20	152	19	142	484
0210120020 - BACON	37	62	0	4	455
0203192000 - SWN MT,PRC,FR,CH	158	78	0	105	422
1602492000 - SW MT NE BND/CK	137	153	259	193	308
0504000080 - PK INT,FZ,X SSGC	0	95	434	571	189
1602412000 - HM,CT,BND,CK	125	115	70	224	163
0206300000 - SWN OFL,ED,FR,CH	0	11	0	0	80
0203221000 - HM,SH,PRC,FZ	0	0	0	0	61
0206490020 - SWN OFL,FZ,HEART	357	81	32	0	61
0206490090 - SWN OFL,FZ,OTHER	350	76	169	179	46
0203229000 - HM/SH,X PRC,FRZ	521	0	155	98	31
0210190000 - SWN NE,ST,DR,SM	0	0	0	0	27
1602419000 - HM.CT.NE,PRP,PRS	0	0	0	100	11
0203194000 - SWN MT,FR/CH	0	0	39	20	9
0203110000 - SWN CRC,FR,CH	247	11	0	0	0
0203121000 - HM,SH,PRC,FR,CH	0	0	0	50	0
0203129000 - HM/SH X PC,FR,CH	0	41	0	0	0
0206410000 - SWN LVR,ED,FZ	98	111	0	0	0
0206490010 - SWN OFL,FZ,TNGUE	0	0	0	105	0
0206490050 - SWN OFL,FZ,RIND	21	0	0	0	0
0504000020 - HG GUT,BLAD,STM	192	72	0	0	0
1602497000 - SWN MT PRP,PR,NE	0	3	6	0	0
Meat Products NESOI	444	474	156	188	1,932
0208909600 - MT/OFL,NES F/C/O	0	0	0	0	1,009
0504000040 - GT/BL/ST SAUS CA	74	0	0	108	360
0204420000 - SH MT,BN IN, FRZ	0	0	9	0	329

0204430000 - SH MT,BNELESS,FZ	0	0	0	32	153
0210990002 - MT/OFL, NES S/D	0	0	0	12	37
0208400100 - CETAC MTOFL FCFZ	0	0	0	0	24
0204500000 - GT MT,FR,CH,FZ	0	0	0	0	11
0410000000 - EDBL PRDT ANL OR	0	0	0	0	6
1601000090 - OTHER SAUSAGE	23	0	94	0	4
0206900020 - SP,LM OFL,ED,FZ	0	3	0	4	0
0208500000 - MT/OFL, REP F/C	0	0	0	32	0
0208902500 - FRG LG,FR,CH,FRZ	249	0	0	0	0
0504000090 - OTH GUT,BLD&STOM	98	471	38	0	0
1603009010 - EXTRCT&JUC OF MT	0	0	16	0	0
Condiments & Sauces	863	1,011	1,289	1,699	1,439
2103909090 - SAUCES AND PREPS	276	345	519	386	482
2103202000 - TOMATO KETCHUP	119	61	109	107	208
2209000000 - VINEGAR & SUBS	42	31	40	99	177
2103204050 - TMTO SAUCES NES	69	160	135	182	149
2103909070 - MIXED SEASONINGS	38	33	140	270	135
2103300000 - MUSTARD FL/ML PR	79	103	117	257	125
2103909020 - MAYONNAISE	153	212	184	373	116
2103100000 - SOY SAUCE	26	0	27	0	25
2103909040 - SALAD DRSSG NESO	60	65	17	25	21
Fruit & Vegetable Juices	1,816	2,094	1,561	1,150	1,193
2009904000 - MIX FRT JU,UNFRM	1,114	975	1,047	702	740
2009902000 - MIX OF VEG JUICE	6	48	191	0	244
2106905400 - MIX JC CONC FORT	72	0	45	194	83
2009690000 - GRAPE JU, NES	50	41	43	73	45
2202903600 - OT FORT JUC NCON	28	17	22	19	28
2106905200 - OT JC CONC FORTF	16	0	6	149	21
2009899000 - JUICE,NES,UNFRM	107	76	41	0	16
2202903700 - JUICE MIXTURES	0	136	0	0	12
2009810000 - CRANBERRY JUICE	0	0	0	0	5
2009110020 - FZ OJ <.946	0	0	3	6	0
2009120000 - OR J N/FZ BX<=20	18	13	33	0	0
2009190000 - ORG JU,N/FZ OTH	0	4	0	4	0
2009210000 - GRPFRT JU,BX<=20	28	0	0	0	0
2009396010 - LEMON JUICE NES	0	0	0	3	0
2009412000 - PAP JU B<=20 N/C	0	4	0	0	0
2009610000 - GRAPE JU, BX<=20	0	27	14	0	0
2009710000 - APPLE JU, BX<=20	0	4	0	0	0
2009790000 - APPLE JUICE, NES	40	0	57	0	0
2106904800 - CONC FORT ORG JC	337	750	60	0	0
Vegetable Oils (ex. soybean)	7,904	8,875	7,279	7,005	8,307
1515290040 - CORN OIL,FLY-RFN	4,837	4,043	2,896	2,592	3,558
1516200000 - VEG OLS HYDR NES	172	397	310	393	1,073
2923202000 - EGG PHOSOLIP OTH	1,518	1,408	1,217	1,058	1,067
1512190020 - SUN.OIL,REFINED	645	1,200	1,021	892	975
1513190000 - COCO.OIL,REFINED	265	596	687	736	837
1514910000 - OIL RPCZMT NESOI	0	0	0	0	220
1517903060 - BKG/FRY FT,ED.NE	53	0	0	150	144
1515908002 - VFO R/NRNCM NESO	60	691	618	496	135
1511900000 - PALM OIL, RFND	0	0	0	0	62
1518000000 - ANML/VG FTS&OILS	0	64	78	302	61
1517903080 - ED AN/VG FT&OILS	0	0	32	35	49
2915700100 - ST OF PMTC,STC	40	108	116	102	44

1515906000 - O JO REFNREF NCM	0	11	11	30	29
1517903040 - VEG OL FRY/BK FT	0	0	119	152	18
1517904085 - ED.AN.VEG.OL NES	0	0	20	0	18
1521100000 - VEGETABLE WAXES	212	38	42	3	14
2916151000 - OLC,LNLC ACIDS	0	7	25	11	3
1509102000 - OLIVE OL,VIRG<18	0	0	3	0	0
1509104000 - OLIVE OL,VIRG>18	0	0	0	4	0
1509904000 - OLIVE OL,REFD>18	0	6	0	0	0
1512190040 - SAFF OIL,REFINED	0	0	0	8	0
1514190000 - O RPCZMT LA RNCM	0	0	0	40	0
1515210000 - CORN OIL,CRUDE	89	90	0	0	0
1515300000 - CASTOR OIL	4	6	3	0	0
1517100000 - MRGRNE EX LQD	0	202	0	0	0
1517903020 - SLD&CKG OL ED MX	0	9	79	0	0
1517904055 - CTSD OL,HYDRGNTD	10	0	0	0	0
Sugar, Sweeteners, Bev. Bases	24,972	17,356	10,165	6,779	8,038
1702905000 - SUG/SYRUP N/FLAV	6,771	5,930	3,773	2,327	4,153
1702300040 - GLUCOSE SYRUP	467	1,479	1,894	1,627	1,712
1702500000 - CHEMICALLY PURE	528	425	294	505	769
1702400000 - GLUCOSE & SYRUP	646	812	534	631	607
1702904500 - SUGARS AND SYRUP	0	3	251	31	331
2106906573 - OTH BEVRGE PREPS	4,359	5,307	2,573	384	193
1701913040 - CN/BT,NT BV,NRET	0	3	35	42	124
1702300020 - GLUC/DEX,SOLID	47	45	10	0	41
2106906571 - BEVG PREP SWEETN	110	64	55	18	41
1701913020 - CN/BT,NT BV, RET	0	0	9	47	27
1702200000 - MPLE SUGAR/SYRUP	0	8	35	39	16
1703100000 - CANE MOLASSES	0	0	0	0	9
0409000055 - NTURL HONEY NESI	267	196	149	710	8
0409000025 - CMB & NT HNY/RTL	46	0	0	5	7
1701911020 - CN/BT,BV BASE RT	0	0	0	6	0
1701992040 - CN/BTSG DRAW NR	22	11	0	0	0
1702600050 - FRUCTOSE SYRUP,	11,605	2,648	102	352	0
1702600060 - FRUCTOSE,S FORM	55	288	399	56	0
2106906572 - BEVRG PREP SUGAR	50	139	53	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 regulations on List of Plant Quarantine Pests and pest risk analysis (PRA) procedures. According to these regulations, all regulated articles subject to PRA before importing into Vietnam must have PRA conducted. Demands for other fresh fruit products from the U.S. such as oranges, blueberries, plums, avocados, etc. are increasing in the Vietnam market.

Selected Meat and Poultry Offal used in meat processing

As of November 2017, Vietnam still suspends the review and approval of white offal products registered by U.S. establishments for export to Vietnam. The United States request for continuing the review and approval of white offal export to Vietnam is ongoing.

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 by clicking on “Attaché Reports” and searching by the link below.

Table 26: Reference GAIN reports

Report Number	Subject
<u>Forthcoming VM7071</u>	Biotechnology report 2017
<u>Forthcoming VM7071</u>	Grain report
<u>Forthcoming VM7069</u>	Food Retail Report 2017
<u>Forthcoming VM7068</u>	Food Service - Hotel Restaurant Institutional 2014
<u>Forthcoming VM7067</u>	Exporter guide 2017 report
<u>Forthcoming VM7065</u>	FAIRS Export Certificate Report 2017
<u>Forthcoming VM7064</u>	Food and Agricultural Import Regulations and Standards – Narrative FAIRS Country Report 2017
<u>Forthcoming VM7062</u>	Rice Weekly Report
<u>VM7060</u>	Vietnam Rice Trade – September – October 2017
<u>VM7059</u>	Coffee Semi-annual report
<u>VM7052</u>	Oilseeds and Products Update – Semi-Annual 2017
<u>VM7051</u>	Grain and Feed Update Quarterly – September 2017
<u>VM7049</u>	Vietnam Rice Trade – June- July – August 2017
<u>VM7046</u>	Rice Weekly Update for weeks from August 26 to September 15 - 2017
<u>VM7042</u>	Can Tho – The Key Driver and Powerhouse of the Mekong Delta Region
<u>VM7036</u>	GVN renewed MARD’s authority and organizational structure
<u>VM7031</u>	GVN revised Decree on Goods Labeling
<u>VM7026</u>	MOH revises MRLs for Pesticides in Foods
<u>VM7024</u>	Coffee Annual May 2017
<u>VM7016</u>	Grain and Feed Annual 2017
<u>VM7015</u>	Oilseeds and Products Annual 2017
<u>VM7006</u>	MARD Removes Extra Steps to the Agricultural Substances Registration
<u>VM6081</u>	Food Retail Sector report
<u>VM6077</u>	FAIRS Export Certificate Report
<u>VM6071</u>	Agricultural Biotechnology Annual 2016
<u>VM6070</u>	Coffee report 2016
<u>VM6065</u>	GVN Renews Regulations on Terrestrial Animals and Animal Products
<u>VM6056</u>	Changes to Special Consumption Tax on Alcoholic Beverages
<u>VM6053</u>	GVN Renews Regulations on Aquatic Animals and Products
<u>VM6041</u>	GVN issues Decree sanctioning violations in plant quarantine

<u>VM6033</u>	Coffee Annual 2016
<u>VM6030</u>	Oilseeds and Products Annual 2016
<u>VM6028</u>	New Law on Special Consumption Tax Adversely Affects Alcohol Imports
<u>VM6012</u>	GVN stipulates Fortification of Micronutrients in Food
<u>VM6011</u>	MARD Releases List of Animal Products Subject to Quarantine
<u>VM6009</u>	MOH revises Regulation on Food Safety Inspection for Import Foods
<u>VM6005</u>	MOH issues the List of Micronutrients allowed to be added to food
<u>VM5088</u>	Vietnam issues mandatory GMO labeling Circular
<u>VM5085</u>	Da Nang – The Key Driver and Powerhouse of the Central and Central Highland (Market Development Report)
<u>VM5076</u>	Coffee Semi-annual 2015
<u>VM5072</u>	Food and Agricultural Import Regulations and Standards – Narrative FAIRS Country Report
<u>VM5071</u>	Food and Agricultural Import Regulations and Standards - Certification FAIRS Export Certificate Report
<u>VM5069</u>	MOF Revises Regulations on Customs Procedures
<u>VM5068</u>	Vietnam National Assembly Passes Animal Health Law
<u>VM5055</u>	MOIT Refines Sugar TRQ Implementation 2015
<u>VM5053</u>	Vietnam Food Service - Hotel Restaurant Institutional August 2015
<u>VM5048</u>	MARD Revises Regulations on Animal Feed Management
<u>VM5047</u>	MARD Publishes List of HS Codes Subject to Plant Quarantine Regulations
<u>VM5044</u>	Vietnam Amends the List of Additives Allowed for Use in Food 2015
<u>VM5042</u>	Agricultural Biotechnology Annual 2015
<u>VM5039</u>	Guidance on Food Safety Inspection of Plant Products
<u>VM5036</u>	Vietnam Removes Value Added Tax on Animal Feed Inputs and Products
<u>VM5035</u>	MARD Releases Circular Summarizing Import Procedures
<u>VM5034</u>	MARD Releases Live Seafood Risk Assessment Procedure
<u>VM5030</u>	Vietnam Coffee Annual 2015
<u>VM5025</u>	Grain and Feed Annual 2015
<u>VM5019</u>	Vietnam Oilseeds and Products Annual 2015
<u>VM5017</u>	Exporter Guide 2015
<u>VM5008</u>	MOIT releases list of import and exports subject to MOIT regulation (FAIRS Subject Report, Wine Beverages, Dairy Products)
<u>VM5006</u>	Food Processing Ingredients 2015 Annual Report
<u>VM5005</u>	Labelling Guidelines Revised for Pre-Packaged Food and Additives
<u>VM4074</u>	Foods Retail Report 2014
<u>VM4073</u>	Food Service - Hotel Restaurant Institutional 2014
<u>VM4072</u>	GOV promulgates provisions of some articles of the Plant Health Law (Fresh Fruit Pest/Disease Occurrences Sanitary/Phytosanitary/Food Safety Planting Seeds) 2014
<u>VM4069</u>	FAS and NOAA Expand Seafood Access Resulting in Record Exports (Fishery Products)
<u>VM4045</u>	MARD Circular 20 Adds Steps in the Ag Input Registration Process

Should U.S. exporters of agricultural food and feed products have any further questions, please email: aghamoi@fas.usda.gov.

