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Retail Food Sector

Report

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Report Highlights:

This is an update of Vietnam's Retail Food Sector.

Imports of consumer-oriented food and beverages continue to show strong growth in Vietnam, spurred on by robust economic growth and a sizeable young population. Total consumable imports for 2006 reached \$515 million, with U.S. exports accounting for a record \$110 million, or just under 22 percent. Vietnam's overall retail sector, of which food is less than half, is a \$23 billion a year industry, with an annual growth rate of about 10 percent. While 88 percent of retail food trade is sold in wet markets and small grocery stores, it is the growing number of modern retail outlets (supermarkets, hypermarkets, wholesale centers and convenience stores/minimarts) that are the primary distribution channels for imported products.

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ECONOMIC OUTLOOK:

- Vietnam has averaged around 7 percent growth consistently over the last decade. And, since 2006, the growth rate has exceeded 8 percent per year, making Vietnam the second fastest growing economy in Asia. All indications are that this trend will continue, given the government's commitment to market liberalization and further reforms to the legal, financial and institutional systems.
- This nation of over 85 million people, with the second largest population in South East Asia and the 6th largest in Asia, has the benefits of a young, educated population of which over half are under 25 years of age. Vietnam also has one of the largest female working population, making the female consumer ever more important.
- Vietnam's per capita GDP reached \$700 in 2006, a sevenfold increase from 15 years ago. Vietnam continues to pursue its ambition of becoming a middle- income developing country by 2010.
- The urban middle and upper class Vietnamese will drive consumerism. Urban per capita income has been increasing at a rate of 8%-10% per annum, and living standards have been improving. In the two largest urban areas, Hanoi and Ho Chi Minh City, the size of the upper and middle classes has almost doubled over the last five years. Five key urban areas (Hanoi, Ho Chi Minh City, Hai Phong, Danang and Cantho) play a vital role in Vietnam's economy, accounting for about 30 percent of GDP and 11 percent of total population.
- Vietnam, with the smallest urban population in Asia, is likely to see a huge rural to urban migration as the economy becomes more industrialized.
- The volume and value of Vietnam's exports continue to rise; exports increased about 22% by value in 2006. The tourist industry also continues to see an increasing number of foreign tourists, at an annual average growth rate of 10 percent; the total for 2007 should be around 4.2 million tourists. Vietnam also gains up to \$4.5 billion per year in remittance income from Vietnamese living abroad. All these sources contribute to an ever-increasing amount of foreign currency earnings in Vietnam.
- Creation of 160,000 private firms over the past five years, in great part due to considerable foreign direct investment (FDI) activities, is a testament to Vietnam's improved environment for investors. FDIs reportedly accounted for \$10.0 billion in investments in 2006 and this figure is expected to increase exponentially over the next few years.
- With its accession to the WTO on January 11, 2007, Vietnam became a member of the largest "modern" trade organization, which require signatories not just to lower import tariffs and eliminate quotas but also to increase market access for goods and services, strengthen IPR protection, help develop infrastructure and enhance legislative and regulatory transparency as well as commercial dispute settlement and business facilitation. According to Vietnam's WTO accession agreement, Vietnam will liberalize the wholesale, retail and franchise sectors. As of January 2007, foreign service providers are allowed to establish joint ventures with Vietnamese partners, and as of January 1 2009, totally foreign-owned retail outlets and franchises may be established. The government reserves the right, however to determine the economic need for additional outlets beyond the initial one.

- Given its large, young consumer base, improving per capita income and strong economic growth, Vietnam's best consumer years are yet to come, with the prospects for more rapid expansion in the retail sector over the next five years looking very promising.

SECTION I. MARKET SUMMARY

I.1. Status of Retail Sector

Consistently strong economic growth and improved per capita income have contributed to the robust expansion of Vietnam's retail trade. Nationwide retail sales of goods and services, estimated at \$23 billion per year, have enjoyed a high growth rate of over 10% per year for the last five years. Food sales as a proportion of total retail sales account for below 50 percent. Food retailing in Vietnam is estimated to be growing at an average rate of 11.18 percent a year, with total food sales in 2006 totaling \$10.2 billion. "Modern trade", with its current small share of only 12 percent of total retail food sales, should continue expanding at the high rate of 20% per annum – the rate of growth over the last six years (2001-2006). Table 1 below offers a view of Vietnam's retail food sales over the past six years.

Table 1: Estimated Value of Overall Retail Food Sales

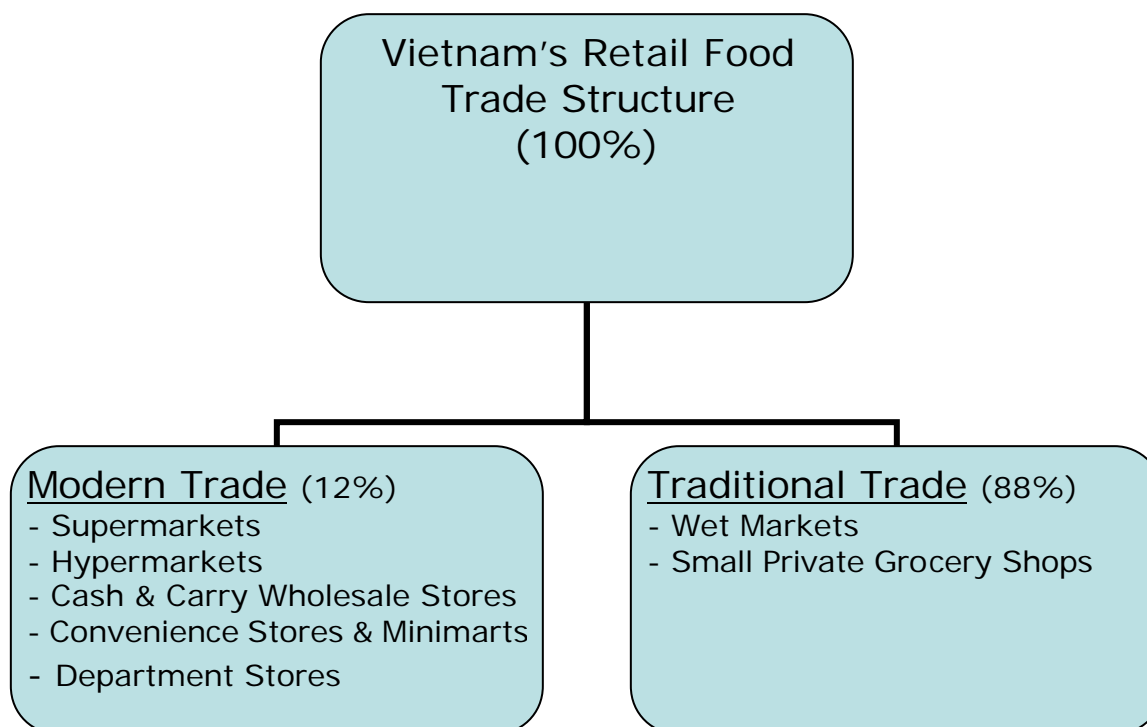
	2001	2002	2003	2004	2005	2006	2001-2006 Average Growth
Value in \$ billion	5.94	6.3	6.95	8	9.2	10.2	
% Growth	10.6	5.4	11	15.1	13.0	12.0	11.18

Source: estimates derived from various trade sources including Euromonitor

The retail food sector in Vietnam is still dominated by traditional wet markets and small household-owned "mom and pop" shops. Modern retailers are still only a small share of the market, but their numbers are growing. Traditional retail trade is being challenged by the current upsurge in modern trade, with the number of supermarkets, convenience stores, mini-marts, hypermarkets, large wholesale stores and department stores on the rise.

A combination of strong economic growth, rising income levels (particularly disposable income), a growing middle class, a sizeable young population and increasing exposure to a Western lifestyle are fueling the rapid growth of modern trade in Vietnam's retailing. Over the last six years (2001-2006), modern trade in Vietnam achieved an average growth of 20% per annum and is expected to continue to grow at this rate for the next five years. More consumers in urban areas are demanding an international shopping experience and increasing numbers are shifting from the 'traditional' to the 'modern' trade (see table 3 for details).

The chart 1 below offers a general overview of Vietnam's food retailing sector, including traditional channels and modern channels:

Chart 1: Vietnam Retail food Trade Structure

Vietnam's booming modern retail trade sector is still limited to major urban areas (Ho Chi Minh City, Hanoi, Hai Phong, Danang and Can Tho) and thus far accounts for only about 12 percent of total food retailing.

Food products are currently sold at over 110 modern supermarkets, 5 Big C hypermarkets, 8 Metro Cash & Carry wholesale centers, 100 modern mini-marts and convenience stores, 25 shopping centers and hundreds of thousands of traditional wet markets and small private shops.

Table 2: Number of modern retail outlets and traditional outlets

Type of Retail Outlet	2001	2002	2003	2004	2005	2006
Supermarkets, hypermarkets & Wholesale centers	51	70	78	95	105	115
Department Stores	11	14	16	18	21	25
grocery shops and wet markets	599,500	607,400	611,200	619,038	623,028	625,766

Source: estimates derived from various trade sources including Euromonitor

Results of independent market surveys point to Vietnam's retail market as a very promising and attractive destination for foreign investment in Vietnam. Actually, A.T. Kearney ranked Vietnam as the World fourth most attractive retail market, after India, Russian and China. Vietnam modern retail trade is set to boom.

Almost all existing large retailers in Vietnam have committed to further expansion, not only in larger cities like Hanoi and Ho Chi Minh City (HCMC), but also in Can Tho, Da Nang, Hai Phong, Long Xuyen and Phan Thiet.

Growth in the modern food retail sector has been slowed by existing government policy, which seeks to protect domestically-owned supermarkets by not permitting 100% foreign-owned investment in the retail sector. However, in accordance with Vietnam's WTO accession agreement, as of January 1, 2009, retail enterprises may be 100% foreign-owned. Currently, foreign companies may form joint ventures with local partners on the condition that their control is smaller than 50 percent. This model has worked well for the Big C hypermarket chain (France) and Parkson (Malaysia). Metro Cash & Carry of Germany was able to enter the market as a 100% foreign invested "cash & carry" operation, requiring, nominally at least, that customers be wholesale purchasers.

While waiting for the full opening of FDI in retailing, several foreign retailers are exploring the option of 100 percent FDI. Industry sources estimate likely investment in retail and supply chain to flourish in the next five years. Such foreign retail chains as Lotte Mart of Korea and Dairy Farm of Hong Kong (through Giant South Asia of Singapore) are reportedly poised to open their first retail outlet or supermarket in early 2008. Dairy Farm will be collaborating with Citimart, a Vietnamese retailer, to start their first three stores named Wellcome in end of 2007/early 2008. As of January 1, 2008, the financial contribution will be dropped, but it will still be necessary for foreign-owned retailers to have a Vietnamese partner until January 2009.

The key constraints to development of modern retail in Vietnam are low consumer income (despite recent gains), a very high cost of land rental in urban areas, expensive electricity and growing inflation (7.5% for 2005 and 6.6% for 2006).

Official data on food sales in the modern retail sector are not available and most store owners are reluctant to make such data public. Thus, Table 3 is our best estimate of the total value of Vietnam's modern retail trade.

Table 3: Estimated value of food sales of modern retail trade (\$ Billion)

Years	2001	2002	2003	2004	2005	2006	Average Growth 2001-2006
Values	0.46	0.53	0.62	0.75	1	1.2	
% Growth		15.2	16.98	20.96	33.33	20	20.25%

Source: estimates derived from various trade sources including Euromonitor.

I.2. Consumer Purchasing Behavior

Vietnamese consumers spend a great portion of their expenditure on food items. About 42 to 45 percent of total consumption expenditure is for food expenditure, mostly staples and basic food items like rice, meat, salt, sugar, vegetable oils and sauces. Very little is spent on high value processed food products. Nevertheless, recent consumer surveys indicate an increase in spending on high-value products such as dairy products (UHT milk, fresh milk, yogurt, cheese etc.), meat, eggs, fresh fruits, vegetables, confectionary, snack foods and sophisticated food items.

Vietnamese consumer's habit:

- Shop daily for food items.
- Prefer fresh products.
- Low percentage of people have refrigerators and microwave (only 12% of urban households have microwave ovens).

Consumer trend in urban areas:

- Still low average income.
- More concern about nutrition, quality, hygiene and food safety.
- Brand loyalty, but still receptive to new products.
- Western style life is welcomed.
- More dining out than before.
- Influenced by advertisement and promotion; especially kids. One market researcher noted that 18% of sales occurring in modern trade are as a result of advertisements and promotions.

I.3. Trend in distribution channels

While HCMC, Hanoi, Haiphong, cantho and Danang have a growing number of modern outlets, the rest of the country still relies heavily on traditional marketing channels. Although small "mom and pop" shops and wet markets continue to play a major role in food distribution, the number of supermarkets, hypermarkets and wholesale supermarkets continues to increase in urban areas due to:

- A growing number of western-minded consumers, especially in urban areas.
- A growing middle class where both parents are working and less time is available for food shopping.
- Aggressive promotion, appealing prices and discounts, plus a wide range of products offered by large supermarkets, attracting even lower-income consumers.
- Increasing consumer acceptance of processed and packaged products. Many products traditionally sold in bulk are now readily available pre-packaged.
- More and more consumers are inclined to buy from supermarkets because they're cleaner than wet markets and the produce is often better quality.

The five-day work week coupled with increasing disposable income of the urban family has accelerated the trend of purchasing ready-to-eat snacks and luxury food items. Local food producers have begun to supply shoppers with ready-to-eat and semi-prepared food items. Prepared food items include a variety of food ingredients, chopped or sliced, wrapped and packaged for home use. This new trend is expected to trigger demand for even more varieties of ready-to-eat and semi-prepared dishes and has contributed greatly to the increase in imports of Western food products. The opportunities for U.S. food products in this market are enormous. Best growth products in recent years have been dairy products (i.e powdered-milk infant formula, UHT milk, cheese and butter); fresh fruits, dried fruits, snack foods, processed fruits, fruit juices, breakfast cereal, confectionary, wine and baby foods.

With a dynamic, well-educated population of 85 million consumers, Vietnam is both an opportunity and a challenge for American high-value foods and beverages. Vietnam is evolving and becoming more integrated with its Association of South East Asian Nations (ASEAN) neighbors, which often enjoy very favorable tariff and trading advantages. Conversely, Vietnam became a WTO member in January 2007, thus opening up more opportunities for trade with the United States and other members through much lower tariffs and improved market access as well as commitments to adhere to international standards on SPS and TBT measures.

Vietnamese consumers in big cities have become accustomed to higher quality consumer-ready products. U.S. products are appreciated for its higher quality, but price continues to be the main factor for purchasing consumer-ready products. Urban consumers are shopping daily in supermarkets more and more and are buying U.S. fresh fruits, canned goods, condiments, sauces, snack foods, nuts, soups, wine, and a variety of other products. While local products continue to be strong sellers because of price, the quality of most locally-made products has not yet reached international standards. At some point in the near future, local consumers will begin to demand higher quality levels.

As foreign companies' access to local trading and distribution rights are still limited, local importers continue to play a major role in distributing and promoting imported products in Vietnam. Typically, local importers have their own sales agents and distribution fleet and are in direct contact with supermarkets, wholesalers, and in many cases, also with thousand of grocery stores. Some importers are involved in imports of a wide range of products with no particular loyalty to a specific product, brand or origin. Other importers are working exclusively to develop markets for specific labels. As these importers tend to promote their products more heavily, they may require more involvement from the exporter in order to penetrate this market.

I.4. Trend in services offered by retailers

Supermarkets in Vietnam tend to be located in big stores that include a number of fast food restaurants, entertainments (mainly games) and specialty shops. The number of adjacent shops varies from 18 to 25 and is meant primarily to attract a large number of visitors. Department stores usually devote a relatively large space for ready-to-eat food and entertainment.

In many cities, the lack of adequate entertainment and amusement sites draws many families to visit department stores and big supermarkets to roam around, and they often end-up buying or at least being exposed to new-to-market products.

Major retail chains have recently invested more resources in developing fresh, chilled and frozen sections as well as ready-to-cook and ready-to-eat food sections. They also provide additional in-store services (i.e. acceptance of credit/debit cards, ATM services, food courts, bakery corners, home delivery, and gift wrapping services) in order to attract more customers and to compete effectively with open-air wet markets. Interest in nutritional characteristics of food should continue to grow. Saigon COOPMART chain has offered home delivery to customers who are able to place orders over \$7.

To support evolving consumer preferences, retailers have focused more on marketing practices. Promotional and advertisement campaigns are more aggressive, with in-store promotions, store flyers, seasonal discounts, and preferences for frequent shoppers. Packaging sizes have been reduced to lower the prices, and more generic brands (especially for staple foods such as rice, salt, wheat flour and sugar) have been introduced.

Internet sales of food products and direct selling to consumers have just been introduced. Internet retailing should see increased sales in coming years.

The "multi-level marketing" concept has recently been introduced to Vietnam, but it has been watched closely by government authority. These officials doubt the value of products marketed under this concept and worry about over-stated or false advertisement in addition to a suspicion that this system will evade taxes.

Franchising is likely to flourish in the country. It would offer an excellent route for multinational firms to enter Vietnam and for domestic enterprises to expand overseas. Last year the franchising market surged 25 percent, with more than a hundred new franchisees and the transfer of a hundred brands. According to global franchisers, Vietnam has all the hallmarks of a franchise haven: a young market, high economic growth, and stable political system. The Vietnamese government has passed the Franchising Decree, which is expected to help bolster the business in the country.

I.5. Import market

The GOVN continues to discourage high value food imports through relatively high tariff and non-tariff barriers. Import tariffs range from 12% - 40% for processed foods and 65 percent for wine and alcoholic beverages.

The Department of Animal Health's SPS requirements for animal products and the Food Administration's food registration requirements for imported foods are cumbersome. They require excessive documentation and are sometimes not based on sound science. Moreover, valuation of imported foods has sometimes not been based on the invoiced transaction value, despite Vietnam's commitment under the bi-lateral trade agreement with the United States. Vietnam has also committed to honoring the invoiced value in its WTO agreement, and it is left to be seen whether it will now more consistently adhere to this.

Consumption of imported consumer-ready food products is expanding in urban areas as per capita incomes increase. Vietnam also receives up to \$4.5 billion annually in remittances from relatives abroad and a significant portion of this amount is spent on consumer goods. Overseas relatives also contribute to promoting the spread of Western goods and lifestyles through the parcels of consumer goods that they send home to their friends and relatives. This has helped introduce and promote several new-to-market food products to consumers in Vietnam. Trade data indicate that Vietnam imported \$515 million of consumer-ready foods in 2006, compared to only \$152 million in 2000. The actual level of such imports may well be higher given Vietnam's porous borders.

US food products enjoy a good reputation among local consumers for their high quality, safety and innovativeness. U.S. exports of high value and consumer-oriented foods and beverages to Vietnam, after years of being only around the \$20 million mark surged to a record \$110.56 million in 2006, 18% higher than that in 2005, but still slightly under 22 percent of total consumer-oriented food imports. U.S. exports of consumer-oriented products to Vietnam in January to September, 2007 were already equal to 2006's imports reaching \$109 million, 57% higher than the export value for the same period of 2006.

Key consumer items include: dairy products, chilled and frozen meat, fresh delicious fruits (apples, table grapes and oranges), canned fruit and vegetables, snack foods, dried fruits, canned meat products, condiments, confectionary products, wine and beverages.

I.6. Advantages and Challenges Facing US Products in Vietnam

U.S. Advantages	Challenges for U.S. Exporters
Improving income and a rapidly-growing middle class enamored with American culture (music, movies, fashion): carries over to American food.	Price-sensitive consumers. Shipping costs and transportation time much higher than Asia, and Australia.
U.S. foods are recognized as high quality	Twenty-year absence from this market limits

items and great value for the price.	knowledge of U.S. foodstuff suppliers, with the general preference being for European (French) food items.
Strong ties between the U.S. dollar and the Vietnamese Dong (less currency risk).	Difficult direct shipments from the U.S. since small lot sizes results in trans-shipping through third-country ports like Singapore and Hong Kong.
Low level of U.S. competition in the market.	Low level of experimentation by Vietnamese urban dwellers with new types of Western food.
Vietnam's accession to WTO in January 2007 helped reduce tariffs on some food items; created better business environment and further liberalized the trading and service markets.	High tariffs, cumbersome and excessive requirement of Customs Department and the Food Administration; non-science based sanitary and phytosanitary requirements on animal and plant products in general.
Vietnam made voluntary tariff reductions on beef, poultry and dairy products, among others, even beyond final bound rates.	Low tariff applied on food products imported from South East Asian (ASEAN) Countries under the Asian Free Trade Agreement (AFTA).
Growing number of western-style fast food restaurant chains, bakeries and coffee shops, as franchising has been introduced and retail food sector transitions to more modern structure.	US exporters not very flexible and responsive to importers' requirements; frequently do not conform with Vietnam regulations.
	Limited infrastructure and distribution for perishable products

SECTION II. ROAD MAP FOR MARKET ENTRY

II.1. Entry Strategy

According to Vietnam's WTO accession agreement, as of January 1 2009, foreign-owned retailers and franchises may be established without need for a Vietnamese partner or Vietnamese investment, as is currently the case. As of January 1, 2008, the Vietnamese capital investment is rescinded, but the Vietnamese partner will still be required until 2009. The government also reserves the right to determine the economic need for additional outlets beyond the initial one. Notwithstanding this, the best way to enter this market is to appoint a local partner for directly importing the products or to act as an agent to arrange for importing, distributing and marketing. The appointed local partner should be responsible for the widest distribution of your products as well as the marketing efforts needed to create awareness for your products among consumers. Business relationships are very important for success and therefore efforts to make regular visits with local partners as well as with key retailers should be a priority.

It is critical for U.S. exporters to spend time and effort to study potential markets for the products before initiating sales. They should also visit Vietnam to gain a first-hand feel of the market, preferably around the bi-annual Food & Hotel Show organized in Ho Chi Minh City (next show in September 2009). U.S. exporters are encouraged to review the FAS exporter guide as well as trade policy reports beforehand. Exporters may contact FAS-Hanoi or FAS-Ho Chi Minh City to assist them with conducting market briefing and in setting up initial meetings with potential importers and major retailers.

Success in introducing your product in this market depends on a good local representative and an effective pricing strategy. The local partner should preferably be an importer and distributor who capable of maneuvering in both traditional channels and modern retail channels. A food supplier wishing to reach all Vietnamese consumers must work with the modern retailers as well as the open-air wet markets and small shops. While HCMC, Hanoi, Haiphong, Danang and Cantho have a growing number of modern outlets, much of the country still relies heavily on traditional marketing channels. According to two major importers of branded food items from the USA and European countries, sales volume to supermarkets is currently about 40 percent of their total sales.

Consider the following before selecting an agent:

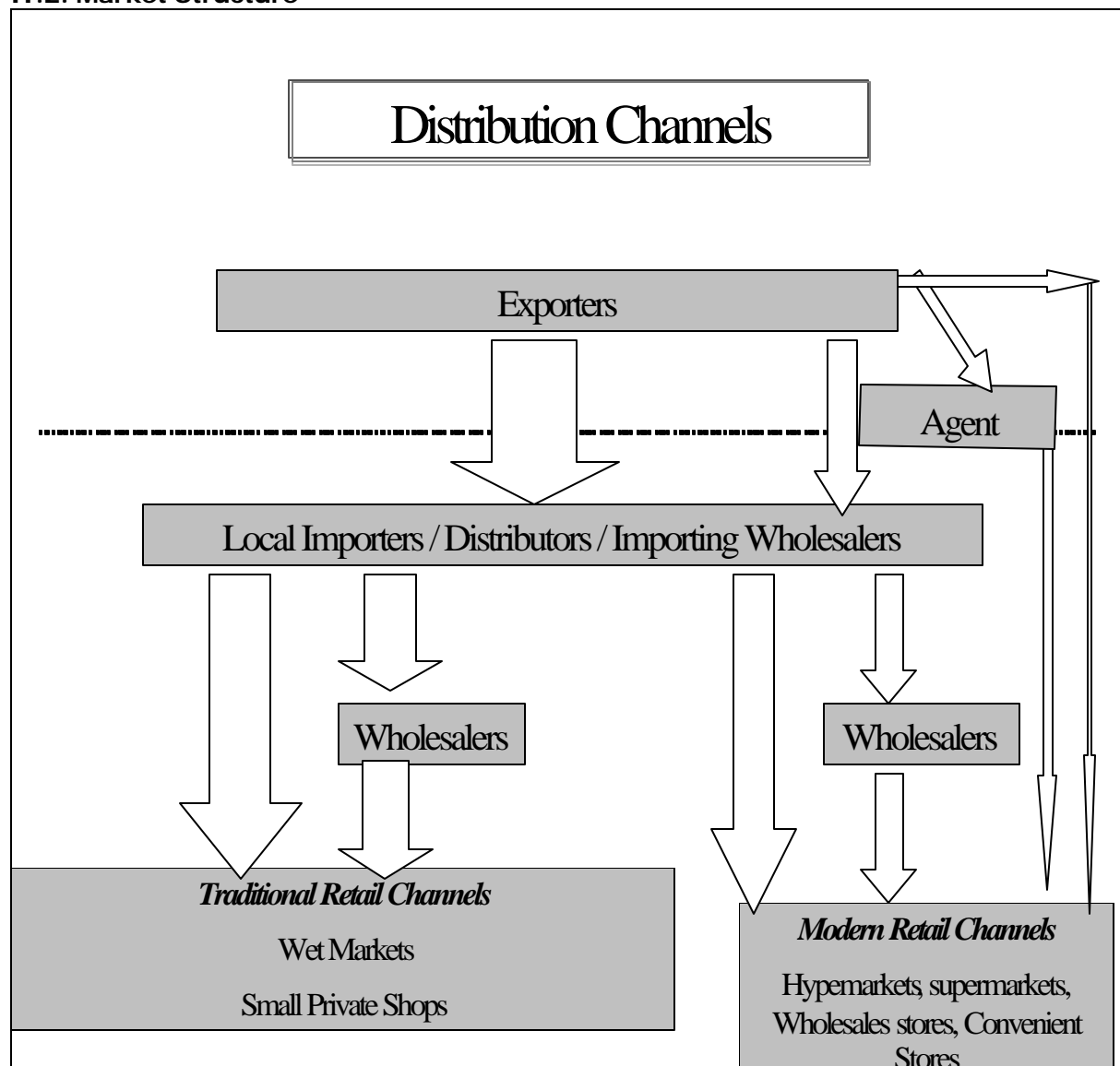
- Good relationship with retailers and ability to deal with local regulators.
- Expertise in setting up distribution networking.
- Those with fewer clients and smaller set-ups are easier to work with as they are more adaptable and committed than those with a large infrastructure and big reputations.
- US firms should evaluate all distributor prospects, and thoroughly research the more promising ones. Check the potential agent's reputation through local industry/trade associations, potential clients, bankers, and other foreign companies.
- FAS-Vietnam maintains and updates major lists of potential importers.

Most importers who are interested in dealing with US food suppliers prefer to:

- * Purchase consolidated containers of a variety of food items in small quantities so as to avoid extra inventory costs.
- * Seek exclusive agreements from exporters.
- * Ask for advertisement and promotion support from exporters.
- * Ask for payment under some credit terms.

The key to success for exporters is to focus on 'reasonable' entry pricing for their products, which is specifically targeted at the desired consumer base.

II.2. Market Structure



Distribution of imported foods:

Distribution of imported foods goes thru one of the four basic models as follows:

- 1) Exporters --> Importers/Distributors --> Big Modern Retailers
- 2) Exporters --> Importers/Distributors --> Wholesalers --> Retailers
- 3) Exporters --> Local Agent--> Importers/Distributors --> Wholesalers --> -----
--> Retailers
- 4) Exporters--> Big Modern Retailers (Metro, Saigon Coop, Big C, Maximart, Citimart, Fivimart)

Model No.1 and No.2 are the most common practice in Vietnam.

In Vietnam, most food importers are also distributors. They often directly move their imported products to big retailers in urban areas and let wholesalers and their agents help move their products to the thousands of small retailers in both urban and rural areas. Due to relatively low purchasing power, most modern retailers source their imported foods

through importers/distributors. Only a few big chains like Metro, Big C, Saigon Coopmart, Maximart and Citimart have tried buying directly from foreign suppliers.

Vietnam's limited distribution infrastructure and facilities for perishable products is a big constraint to importing products. The distribution systems are often equipped with out-of-date technology and transport products using inadequate or fragmented cold chain and improper handling.

II.3 Trends in Distribution

The modern retail sector is expanding rapidly, but the traditional sector will continue to dominate the distribution system for some years to come. Utilizing state-of-the-art technology and equipment and taking advantage of strong financing, large retailers put in place central warehousing and distribution systems in the big cities and increasingly import directly (particularly perishable products i.e. fresh produce, frozen meat and vegetable) from foreign suppliers. They will open more outlets not only in the big cities but also in other regions to maximize their capacity.

With firm commitments from the government to liberalize markets, Vietnam will receive more foreign investments in distribution.

A: Modern retail trade sector: Super Markets/Hypermarkets/Convenient Store Chains

- Modern retail trade is expected to continue to expand at a very fast pace of over 20% per annum over the next five years. Large Vietnam corporations such as SATRA, HAPRO, PHU THAI are entering into retailing. Several global retailers are exploring opportunities of doing retailing in Vietnam.
- About 18 percent to 20 percent of imported high value food items are sold through modern outlets.
- Most supermarkets, hypermarkets, and wholesale stores buy most of their imported products from importers/distributors or agents.
- A few are importing directly from foreign suppliers, particularly perishable products and specialty products.

Table 4: List of major Supermarkets/Hypermarkets/Wholesale Stores

Retailer Name/ Outlet Type	Ownership	No. of Outlets	Estimat ed Sales Turnove r (US\$ mil)	Locations and expansion plan	Imported Food Purchasing Agent
COOPMART/ Supermarket & Convenience Stores	Local company operated under co- operative law	24 supermarkets 34 convenient stores	200	- Mainly in HCMC (14 stores). - Just expanded to Can Tho, Long Xuyen, Phan Thiet, Gia Lai - Plan: other cities (Ben Tre, Buon Me Thuoc)	- Mainly from importers/distributor s and wholesalers. - Small portion of food imported directly
CORA / Hypermarkets and Supermarkets	Local Joint Venture with Casino Group of France	5 Hypermarkets 1 Supermarket	NA, should be over 65	- HCMC, Dong Nai, Hanoi, Hai Phong, Danang. - Plan: open 4 more stores.	- Mainly from importers/distributor s and wholesalers. - Small portion of food imported directly

Maximart Supermarkets and Department Stores	An Phong Private-Owned Company	4	48	- HCMC, Nha Trang, Cantho, Binh Duong - Expand to Binh Duong soon	- Mainly from importers/distributors and wholesalers.
Citimart Supermarkets and Convenient Stores	Private-Owned Company	12 Supermarkets 4 minimarts	38	- HCMC, Hanoi, Can Tho, Dong Thap	- Mainly from importers and distributors
Intimex Supermarkets and Department Stores	Joint-Stock Company	10	25	Hanoi, Haiphong, Hai Duong, Nghe An, Danang	- Mainly from importers and distributors
FIVIMART	Private-Owned Company	10	25	- Hanoi, HCMC, Binh Duong	- Mainly from importers and distributors
Binh Dan Supermarkets	Private-Owned Company	2	NA	-HCMC	- Mainly from importers and distributors
SATRA Supermarkets	State-owned Company	2	NA	- HCMC	- Mainly from importers and distributors
Select Supermarts	Private-Owned Company	5 supermarkets 5 minimarts	NA	-HCMC	- Mainly from importers and distributors
Metro Cash & Carry wholesale stores	100% Foreign Invested Company (Germany)	8	NA, should be over 350	- HCMC, Hanoi, Hai Phong, Cantho, Danang. - Plan: open 4 more stores in HCMC, Hanoi, Dong Nai	- Mainly from importers and distributors. - Direct imports for fresh and frozen products.
SEYU Supermarket	Local Joint-Venture with Seyu of Japan	1	NA	- Hanoi	- Mainly from importers and distributors.
PAKSON Department Store	Local Joint-Venture with Pakson of Malaysia	3	NA	- HCMC, hai Phong. - Plan: open a total of 10 stores.	- Mainly from importers and distributors.
VINATEX	State-owned company	20 supermarkets 10 minimarts	NA	HCMC, Dong Nai	- Mainly from importers and distributors.
HAPRO	State-owned company	7 Hapromarts and 18 convenient stores	7		- Mainly from importers and distributors
Wellcome Supermaket (Dairy Farm)	Business Cooperation Contract with Citimart	1	NA	- HCMC. - Plan: open a total of 6 stores in Vietnam for the first phase.	- Mainly from importers and distributors
Note: The sales turnovers are estimated thru interviews with trade sources and are furnished for your information with the understanding that no discrimination is intended and no guarantee of reliability is implied.					

The modern retail trade concept (initially called supermarkets, hypermarkets, cash and carry wholesale center, minimarts) has grown tremendously in the last eight years, going from only 2 supermarkets in the early stage (1998) to more than 115 in 2006. Before 1999, open-air wet markets and non-staple food small private shops were the norm, yet in the most recent eight years, Vietnam's urban economy has begun a steady transition away from the

traditional trade (open-air wet markets and small shops) to modern trade (supermarkets, hypermarkets, shopping centers, etc.). More than two third of supermarkets and department stores are based in HCMC and Hanoi. Today, Hanoi has more than 30 stores, while HCMC has in excess of 65 modern stores.

Local chains are still dominating the market but foreign-invested retailers are also very quickly in expanding, creating a good competitive environment in the modern retail sector. The key domestically-owned supermarket chains are Saigon Coopmart, Intimex, Maximark, Citimart and Fivimart. The four foreign-owned chains are Big C (a French invested Casino group) , Metro Cash & Carry (a Germany invested Metro Cash & Carry) and Pakson (a Malaysian invested Pakson) and Wellcome (a Singaporean invested Dairy Farm).

As a result of Viet Nam's commitments on WTO, retail business will be fully opened to foreigners by January 2009. Local retailers will face big challenges of competing with experienced multi-national giant retail groups. Vietnamese retailers will have two more years to strengthen their distribution networks and retail chains before foreign giant retailers land in the market by 2009. Being well-aware of the challenge, many Vietnamese retail and distribution companies have expanded their retailing and distribution, and actively worked together to build a more vibrant distribution network.

Since 2005, the Viet Nam Garment and Textile Group (Vinatex) has come off well with a chain of 20 supermarkets and ten minimarts in almost all big cities in the country. The group hopes to double the number by 2010.

Since 2006, Hanoi Trading Corporation (Hapro) has put strong investment in new retail outlets and also in upgrading existing Hapro's convenience store network. By end of 2007, the corporation will have 6 hapromarts in Hanoi, Thai Nguyen, Bac Can, Hai Duong, Thanh Hoa and Ninh Binh and about 18 convenient stores in Hanoi. The corporation's retail business is estimated at VND 100 billion in 2007. By 2010, the corporation's strategy is to have 5 commercial centers, 5 hypermarkets, 70 supermarkets and about 800 convenience stores in Hanoi and neighboring provinces.

In May 2007, the establishment of the Viet Nam Distribution Association Network Development Investment Joint Stock Co. (VDA), from the joint-effort of 4 leading companies in this field including Saigon Coop (the biggest retailer in Vietnam), Hanoi Trading Corporation (Hapro), Saigon Trading Corporation (SATRA) and Phu Thai Corporation, was seen as the start of an industry trend geared towards greater cooperation between local retailers and distributors. By utilizing retail and trading expertise and financial strength of the 4 leading corporation, VDA will focus on building and developing a chain of trading centers and hypermarkets to establish a commercial infrastructure facilities network, thus creating conditions for the re-organization of the retail, distribution and wholesale networks. VDA hopes to be in better position in competing with foreign giant retailers and to be one of the major players in goods distributing and retail business in Vietnam.

In October 2007, Vietnam also established Vietnam Retail Association (VRA) comprising of 100 local retailers with its aim to strengthen the development of Vietnam distribution services through the linking of Vietnamese retailers for their joint-efforts to build and develop the country's retail network.

About 11 percent to 12 percent of the country's total food and beverage retail sales are sold through modern trade channels. Of which, roughly 18%-20% are imported food and beverage sales.

Supermarkets in Vietnam carry a wide range of goods including food, clothing, shoes, and durable products. Most supermarkets devote about 40-50 percent of the physical space to food, and the rest is divided among all the other commodities. The shop-owners are quite willing to rearrange the physical space to boost the floor allocation for whichever goods are doing best that month. More large hypermarket and wholesale stores (e.g. Metro and Big C) and shops within a multi-store shopping mall (e.g. Diamond Plaza, Saigon Center, Pakson) are being built in Vietnam. Most of the shops have made some provision for parking -- more for motorcycles than cars. In the Vietnamese supermarket business, it is estimated that approximately 50 percent of total supermarket sales are from food sales, of which imported food accounts for a small percentage ranging from 15 percent to 25 percent of total food sales.

The largest hypermarket (in terms of checkout lanes and parking spaces) is still the French invested Big-C Hypermarket (1998) in Dong Nai Province, 45 minutes outside of HCMC. Big-C boasts 37 checkout lanes and carries a wide assortment of foreign and domestically produced foods and consumer goods. Big C currently has two hypermarkets and one supermarket in the south of HCMC and one hypermarket in Hanoi (opened in 2004), one in Hai Phong and one in Da Nang. The Casino Group of France, who owns the Big-C chain, has announced an investment plan to build 4 more stores in Vietnam. They also say they will become completely foreign owned in the coming year and unlike other fully foreign-owned companies until this point in time retain the right to import directly.

Ho Chi Minh City has an estimated population of 8 million and is considered the economic and commercial center of Vietnam. The city has the largest concentration of upper and middle class consumers in Vietnam and thus investors in retail distribution are particularly interested in this city. Hanoi Capital has about 3.2 million people with a large number of employees of the government, foreign missions, and international organizations that can be targeted with modern distribution chains. Hai Phong City – the commercial port area in the north; Can Tho City – the commercial hub for the Mekong Delta region and Danang City – the commercial hub for the central region are also strategic locations for setting modern retail distribution.

Ho Chi Minh City (HCMC) - the biggest commercial center of Vietnam - is the most economically dynamic area in the country. With the highest annual GDP growth rate (over 10% in the period of 2001-2006) in Vietnam, HCMC has attracted the most foreign and domestic investment for a wide range of projects. Although the national average GDP per capita is just over \$700 per year, in HCMC it is estimated at over \$1,800. In conjunction with strong economic growth, the supermarket sector in HCMC has grown tremendously in recent years. HCMC is now home of 55 supermarkets, 3 wholesale centers and 2 hypermarkets. Until early 1999, the only Western-style shopping center (multiple stores and a parking lot) in Vietnam was the joint venture (Singaporean investors and the Vietnamese Army) Superbowl Shopping Center. Since 1999, there have been at least 16 new shopping centers launched in HCMC. This retail revolution seems certain to continue as all the domestic and foreign-owned chains plan to develop additional shopping centers in HCMC suburbs and surrounding regional cities. According to trade sources, HCMC supermarkets are averaging 100,000 walk-thru customers a day, which is good, but still a very small percentage of a city population of nearly 8 million.

Three new upscale shopping centers, 2 from Pakson and 1 from Saigon Center, opened in HCMC recently. Paksons Shopping Centers, a Malaysian investment is located in the center of HCMC with the goal of creating an attractive shopping space for both foreign tourists and

local people. Many additional projects (both large and middle-sized) are due to open in HCMC, Hanoi and the surrounding regions. Saigon Coopmart (a state-owned supermarket chain), currently owning 14 stores in HCMC and 7 in other provinces, takes a 40% share of supermarket sales in Vietnam. It has just announced piling construction of 02 new stores in Ben Tre and Buon Me Thuoc in October 2007. Saigon COOPMART is planning on constructing 10 more stores from now until 2010.

Metro, the international grocery chain, known in the developing world for their cash and carry operations, entered Vietnam by setting up two large (each roughly 15,000 square meters) wholesale centers in HCMC. The first store opened in April 2002 and the second store was established in December 2002. Those stores are operating as a cash and carry operation nominally for wholesale customers but controls on access are weak. It offers additional services such as delivery for large customers. Recently, Metro opened 6 more stores in Hanoi, Can Tho, Haiphong, Danang, Ho Chi Minh City. These stores have currently attracted more than 450,000 member customers. Metro has asked the Government of Vietnam's approval to build 4 more stores in Vietnam.

Metro has already had an impact on the grocery sector, but it is important to note that Metro is not directly importing commodities. Given Vietnam's current restrictions on distribution and importing rights, only licensed importers may bring commodities into Vietnam. So, until the laws are changed by 2009, Metro needs to work with many local (and usually small) importers to source most of the imported goods that it needs. For big product volume, Metro negotiates directly with foreign suppliers in product quantity and prices and assigns local importers to import.

Hanoi's modern retail trade sector has always lagged behind HCMC, but it is now rapidly catching up. During 2002-2007 10 large supermarkets opened in Hanoi and four opened in Hai Phong. Intimex has been a big player in modern supermarket trade in the North of Vietnam with 5 supermarkets in Hanoi and 2 in Hai Phong. Fivimart has also expanded to have more stores in Hanoi. Hapro, since 2006, has developed his retail system including two supermarkets in Hanoi and 18 convenient stores. Recently, the Big C chain has opened its first store in Hanoi. The Big C store has 6,500 square meters of space for a wide range of goods and an additional 6,000 square meters for restaurants. Metro has just opened the second center in Hanoi. As of September 2007, Hanoi has roughly 30 modern stores. Several of the large domestically owned chains from HCMC, especially Saigon COOPMART chain are looking to open outlets in Hanoi in the near future after land and supply chain issues can be resolved.

Convenient stores and minimarts:

Given busier working environment and bad traffic in urban cities, convenient store and minimart business will see a potential growth in the future.

Saigon Coop is the leading company in jumping in this convenient store business with the establishment of 34 coop stores in Ho Chi Minh City.

Vissan – the leading meat processing company in Vietnam is also active with more than 40 convenient stores offering various kinds of meat cuts, fresh vegetable and fruits as well as packaged foods and drinks. Vissan's convenient store business earns about 15 million a year.

Recently, Trung Nguyen Coffee Corporation has also expanded to this convenient store business by contracting with selected existing "mom and pop" shops to upgrade them to more convenient and modern stores. He has successfully contracted with over 400 stores nation-wide, mainly in HCMC and Hanoi.

“Shop & Go” minimarts have been recently presented in Ho Chi Minh City since early of 2007 and have expanded to about 18 stores in Ho Chi Minh City. These air-conditioned stores are quite modern in term of product display and cleanliness offering a quite range of imported packaged food and drink products.

B. Traditional Retail Trade: Wet Market & Private Small Shops

According to the Ministry of Trade, there are about 8,000 traditional wet markets in Vietnam and hundreds of thousands of small private shops spread all over the country. Household-owned shops and wet markets are still most popular in Vietnam’s retail industry. Most of these outlets offer only the basics with limited selection, lack of refrigeration, fixed prices, no modern technology, and little or no ambience. Floor space normally ranges from 100 to 300 square feet. Outside of HCMC and Hanoi, food distribution heavily relies on these traditional channels. It is estimated that 80% of imported foods are distributed thru this traditional trade.

SECTION III. COMPETITION

The biggest competitor for US foods in the retail food market is Australia, China, ASEAN countries and the local food industry. Potential US exporters should understand that Vietnam’s diverse agro-industrial base already offers many products at competitive prices. The leading multinationals from other countries have just started establishing food processing operations in Vietnam and are able to offer a range of western-style products at reasonable prices, though the quality may be inferior to imported products due to the poor quality of the raw material supplies. Most products from China, and ASEAN countries also enjoy lower tariffs than U.S. products. While some consumers are aware of quality differences and insist on world standards, most will sacrifice quality for affordable prices.

Products from Australia, New Zealand, the European Union (EU) and other Asian countries (China, Thailand) directly compete with like items from the United States. In addition to the freight cost advantages, market sources report that suppliers from these countries are more responsive to importers’ demands for smaller shipment sizes, and are more willing to modify product specifications to meet Vietnam food laws, in contrast to many US suppliers. Australia and New Zealand aggressively promote their products in the Vietnam market. Recently, countries like Thailand have also organized trade promotion series in Vietnam. Market promotions by these countries are mainly through trade missions, trade servicing, in-store promotions, and participation in food shows.

There are no reliable data on imports of consumer food products for retail sale in Vietnam. See table 5 below for trends in Vietnam’s imports of consumer ready food products and U.S. market share based on post estimates.

SECTION IV. BEST PRODUCT PROSPECTS

The below table shows U.S. food products present in the market that have good sales potential including market share of some selected U.S food products in total imports. The import data in 2006 by commodities are our estimation as there are no published official statistics data on imports of consumer food products for Vietnam (see table 5).

Table 5: Estimated Vietnam imports of selected consumer-oriented foods

(Unit: Million USD)

Commodities	Import Duty	2006 Vietnam Imports	2006 Total US Exports	Jan-Sep 2007 US Exports	% change Jan-Sep 2006	% Growth	Market share of US (%)	Competing Country
Fruit Juice (HS 2009)	35%	900	251	623	102	511	27.89	Australia
Raisin (HS 080620)	25%	1,300	1,090	429	460	(7)	83.85	China
Vegetable Preparation (mainly potatoes -HS 2004)	25%	1,500	1,190	1,150	756	52	79.33	Canada
Wine (HS 2204)	65%	7,500	411	320	150	113	5.48	France
Beef Meat (HS 020220-30)	12%	9,000	5,000	10,000	3,500	186	55.56	Australia
Table Grapes (HS 080620)	25%	11,200	5,140	2,310	2,040	13	45.89	China
Poultry meat (HS 020714)	12%	11,200	5,902	12,500	1890	561	52.70	Brazil
Apple (HS 080810)	20%	17,000	2,800	2,690	1,100	145	16.47	China
Seafood (HS 0302-0307)	10%-20%	95,000	6,000	5,660	4,970	14	6.32	Norway
Dairy products (HS 0401; 0402 & 0404)	3%-7%	235,000	41,500	33,270	31,320	6	17.66	New Zealand
TOTAL VIETNAM FOOD IMPORTS		515,000	110,560	109,350	69,633	57	21.47	

Source: U.S. Department of Commerce & Trade Sources

A. Products Present in the Market which have Good Sales Potential

Of U.S. products that are already present in Vietnam market, delicious fresh fruit especially apple and grapes continues to have the best sales prospects. The next most important U.S. sales item in the retail sector are dairy products, chicken meat, red meats, dried fruits, prepared vegetable. Canned foods, such as canned vegetable and mixed cocktail are also common. Some of the best selling processed foods include frozen french fries, snackfood/biscuit/crackers, popcorn, baby food, condiments (dressing, sauces) and wine.

B. Products Not Present in Substantial Quantities but which have Good Sales Potential

There are also good opportunities for sales of other American high value items. Many of these are not yet in the market in significant quantities. These include pears, cherries, pork meat, other-than-raisin dried fruits and nuts (mainly almond and pistachios), fruit juices and chocolates.

C. Products Not Present Because they Face Significant Barriers

American products that have not sold well in Vietnam include seafood, bourbon whisky. Retailers that serve the middle and lower income segment also reported difficulties in selling American wine and beer due to its high prices.

Imports of U.S. chicken parts, which have great potential demand in Vietnam, have just been facing zero salmonella tolerance barrier from Vietnam.

SECTION V. POST CONTACT AND FURTHER INFORMATION

U.S. Department of Agriculture / Foreign Agricultural Service (USDA/FAS)

First point of contact for updated reports and trade data is the USDA/FAS Web Page:

<http://www.fas.usda.gov>

The FAS web site will also provide additional information about the staff, resources, and programs coordinated by FAS/Washington to promote international trade.

State Regional Trade Groups

The State Regional Trade Groups (SRTG) are four regionally located, non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. USDA's Foreign Agricultural Service (FAS), the State Departments of Agriculture and private industry fund the SRTG's. They carry out promotional activities that increase exports of U.S. high-value food and agricultural products. Activities of the organizations are directed by the State Departments of Agriculture, state agricultural promotion agencies, and coordinated with FAS' Washington and country offices overseas, and include: International trade exhibitions, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world.

The SRTG's also administer a cost-share funding program called the "Branded" program, which supports promotion of brand name food and agricultural products in overseas markets. The SRTG's include: the Western U.S. Agricultural Trade Association ([WUSATA](http://www.wusata.org) – www.wusata.org), in Vancouver, Washington, the Food Export Midwest USA (formerly [MIATCO](http://www.miatco.org) – www.miatco.org) in Chicago, Illinois, the Southern U.S. Trade Association ([SUSTA](http://www.susta.org) – www.susta.org) in New Orleans, Louisiana, and the Food Export USA ([FoodExport USA NE](http://www.foodexportusa.com)) in the Northeast. See the FAS web site for more details:
<http://www.fas.usda.gov/agexport/OldSiteFiles/psinfo.html>

FAS Cooperators and Participants

The American food and agriculture industry benefits from a large number of associations and organizations that support export market development. These groups, referred to as "participants" and "cooperators" receive support from FAS to conduct activities overseas such as trade missions, pavilions at trade shows and informational seminars.

A database of these organizations, including contact information, is available at <http://www.fas.usda.gov/scripts/mos/HomeOffDir.asp>.

Partners and Cooperators which offer on-line databases and directories of suppliers are listed at <http://www.fas.usda.gov/agx/Buying/Partners.htm>

USDA/FAS Offices in Vietnam

The physical addresses of the FAS Offices are shown below. Contact the FAS Offices for the U.S. and Vietnamese Mailing Addresses:

Foreign Agricultural Service / Agricultural Affairs Office (Ag Hanoi)

U.S. Embassy – Annex Building
Rose Garden Building, 3rd Floor
170 Ngoc Khanh, Ba Dinh District, Hanoi, Vietnam
Tel: 84-4-831- 4580 Fax: 84-4-831- 4573
Email: AgHanoi.group@fas.usda.gov

Contacts:

Mr. John Wade – Agricultural Counselor
Ms. Valerie Ralph – Agricultural Attache
Ms. Bui Thi Huong - Agricultural Specialist
Ms. Nguyen Thi Huong – Agricultural Assistant
Ms. Phan Thi Thu Huong - Administrative Assistant

Foreign Agricultural Service / Agricultural Affairs Office (ATO - HCMC)

U.S. Consultant General – Annex Building
Saigon Center Building, 9th Floor
65 Le Loi Street, District 1, Ho Chi Minh City, Vietnam
Tel: 84-8-825-0502 Fax: 84-8-825-0503
Email: AtoHoChiMinh.group@fas.usda.gov

Contacts:

Mr. Truong Minh Dao - ATO Marketing Specialist
Mr. Tran Quoc Quan - Agricultural Specialist
Ms. Pham Khanh Linh - Administrative Assistant & Trade Show Coordinator

American Chamber of Commerce—Hanoi and Ho Chi Minh City**American Chamber of Commerce (AmCham)**

Hanoi Chapter
Press Club, 5th Floor
59A Ly Thai To Street, Hanoi, Vietnam
Tel: 84-4-934-2790; Fax: 84-4-934-2787
Email: adam@amchamhanoi.com
Website: www.amchamhanoi.com
Contact: Mr. Adam Sitkoff, Executive Director

American Chamber of Commerce (AmCham)**Ho Chi Minh City Chapter**

76 Le Lai Street, District 1, Ho Chi Minh City, Vietnam
Tel: 84-8-824-3562; Fax: 84-8-824-3572
Email: amcham@hcm.vnn.vn
Website: www.amcham.org.vn
Contact: Mr. Herb Cochran, Executive Director

Key Government Contacts**Ministry of Trade (MOT)**

21 Ngo Quyen Street, Hanoi, Vietnam
Tel: 844-826 2552 Fax: 844-826-4696
Website: www.mot.gov.vn
Contact: Mr. Vu Huy Hoang, Minister
Mr. Nguyen Cam Tu, Vice Minister (email: nctu@mot.gov.vn)

Ministry of Planning and Investment (MPI)

2 Hoang Van Thu, Hanoi, Vietnam
Tel: 844-8435-5298; Fax: 844-8234453
Contact: Mr. Vo Hong Phuc, Minister
Mr. Duong Duc Ung, Director, Foreign Economic Relations Department

Ministry of Health (MOH)

Vietnam Food Administration (VFA)
138A Giang Vo Street, Hanoi, Vietnam
Tel: 844-846-3839; Fax: 844-846-3739
Email: vfa@vfa.gov.vn
Web: www.vfa.gov.vn
Contact Mr. Tran Dang, Director of VFA

Clearance for Food, Food Ingredients and Additives

The Food Administration Department is the primary contact for most questions and concerns regarding approved food ingredients, food safety issues (Vietnamese and International Standards), general food-related trade and food registration questions.

Ministry of Agriculture and Rural Development (MARD)

2 Ngoc Ha Street, Hanoi, Vietnam

Tel: 844-845-9670; Fax: 844-845-4319

Website: www.mard.gov.vn

Contact: Mr. Cao Duc Phat, Minister

Mr. Le Van Minh, Director, International Cooperation Dept. (Email: leminhmard@fpt.vn)

*** Department of Plant Protection (MARD).**

149 Ho Duc Di Street, Dong Da, Hanoi

Tel: (84-4) 851 9451 Fax: (84-4) 533 0043

Website : <http://www.ppd.gov.vn/indexe.asp>

Contact Mr. Nguyen Quang Minh, Director

Mr. Le Mau Toan, Vice Director (email: lemautoan@fpt.vn)

Mr. Dam Quoc Tru, Vice Director

*** Crop Protection Department / Phytosanitary Sub- Department Zone II (HCMC)**

28 Mac Dinh Chi, Dist.1, HCMC

Tel: 848-829-4568; Fax: 848-829-3266

Email1: nguyenvan_nga53@yahoo.com

Email2: kdtvv2hcmc@vnn.vn

Contact Nguyen Van Nga, Director

*** Department of Animal Health of Viet Nam (MARD)**

No 15, Gate 78, Giai Phong St., Phuong Mai, Dong Da District

Hanoi, Vietnam

Tel: (84-4)868-7151, (84-4)869-6788 Fax (84-4)869-1311

Website: www.cucthuy.gov.vn

Email: quanganh.dah@fpt.vn

Contact Mr. Bui Quang Anh, Director

*** Regional Animal Health Office No.6 (HCMC)**

521/1 Hoang Van Thu, Tan Binh District

Ho Chi Minh City, Vietnam

Tel: (84-8) 8444024 Fax: (84-8) 8444029

Email: rahchcmc@hcm.vnn.vn

Contact: Mr. Dong Manh Hoa, Director

*** Vietnam National Fishery Quality and Veterinary Directorate (MARD)**

10 Nguyen Cong Hoan Street, Hanoi, Vietnam

Tel: 844- 8354 966/fax: 844 – 8317221

Email: nafiqaved@mofi.gov.vn

Contact: Mr Nguyen Tu Cuong, director