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Food Service - Hotel Restaurant Institutional

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Report Highlights:

This report provides information regarding developments in the Hotel, Restaurant, and Institutional (HRI) food service sector in Vietnam and provides a road map for exporters wishing to enter the food service market. During the current worldwide economic slowdown, Vietnam's GDP grew by 5.9 percent in 2011 (a strong, albeit lower level than previous years) and will likely slow further in 2012 to an estimated 5 percent. However, rising disposable incomes, urbanization, government policies encouraging market liberalization, changing consumer preferences, and growth in the tourism sector have all contributed to strong growth in the HRI food service sector making Vietnam an attractive market for U.S. consumer oriented food and agricultural products.

Post:

SECTION I. MARKET SUMMARY

Over the last few years, a combination of strong economic growth, strong tourism growth, rising income levels (particularly disposable income), a growing middle class, a sizeable and growing youth population, and increasing exposure to Western lifestyle has fueled the rapid growth of the Hotel, Restaurant, Institutional (HRI) food service sector in Vietnam. Vietnam's dynamic, young, and educated population of over 88 million is the driving force behind food service sector and processed food product consumption. From 2001 to 2007 the economy grew at a rate of more than 7 percent per year, the second highest growth rate in Asia. During the current worldwide economic slowdown (2008-2011), Vietnam GDP growth was still strong at an annual average rate of 6.1 percent but has since slowed down further to an estimated 5 percent in 2012. During 2006-2011, tourism sector growth has outpaced broader GDP growth at an estimated annual average rate of over 10.5 percent (in term of number of foreign visitors) and over 18 percent (in term of tourism revenue), contributing \$6.3 billion to the economy in 2011. It is expected that the sector will earn a record of \$6.7 billion in 2012.

Efforts by the Government of Vietnam and media has risen the public's awareness of food hygiene and safety, and Vietnamese consumers, especially those in urban areas, prefer to visit foodservice outlets that can offer both convenience and assured food hygiene and safety. In fact, food safety and hygiene has become one of Vietnamese consumer's most important concerns when making food purchase decisions.

Vietnam's HRI food service sector consists of over 540,000 outlets including over 430,000 street stalls/kiosks; 7,000 fast-food restaurants; 80,000 full-service restaurants; 22,000 cafeterias/bars; and more than 12,500 hotels and resorts. The total consumer food service sales in Vietnam achieved an average growth of 8.8 percent per year during 2005-2011, and are forecast to grow at a slower, but still strong, rate of 5 percent during the next five years. Despite the recent worldwide economic slowdown and Vietnam economic slowdown, the outlook for high-value food and beverage exports to Vietnam is still very promising.

Hotels and Resorts: The hotel and resort subsector has grown over the last six years, and is expected to continue to grow in future years as the Government of Vietnam continues to emphasize tourism in their economic growth plans. Tourists are a driving force in the demand for imported high-value food products from the hotel and restaurant industry. Foreign and domestic tourists in 2011 totaled 6 million and 30 million, respectively, up from 3.7 million and 16 million in 2005. The number of foreign tourists has been growing at an annual rate of over 10.5 percent during 2006-2011. Despite a decrease in foreign visitors in 2009 due to the global economic downturn (16% fewer compared to 2008), foreign visitors recovered in 2010 and reached a record 6 million in 2011. In 2012, there is optimism that the number of foreign arrivals and domestic tourists will set a new record, Vietnam's tourism industry expects to welcome 6.5 million international tourists and 32 million local visitors this year, generating an estimated \$6.7 billion in revenue.

The number of hotels (from standard to five-star hotels) has tripled since 2005 to over 12,500 hotels providing over 250,000 rooms. Local businesses and foreign invested businesses continue to invest in

developing hotels and resorts in Vietnam. A number of international tourism developers have set their sights on Vietnam as a development priority. The hotels and resorts subsector remains a potential entry-point for high-value U.S. food and agricultural products.

Restaurants: Household-owned small outlets still dominate total sales of the food service sector. However, Quick Service Restaurants (QSR), Full-Service Restaurants (FSR), cafeteria/bars (CB), and catering service companies have all experienced growth in recent years. Nationwide food service sales reached a record estimated \$24.3 billion in 2011 (Source: Euromonitor’s data with a fixed exchange rate). Independent cafeteria/bars and full-service restaurants have sprung up around new office buildings and living spaces in urban areas to cater to an increasing modern, urbanized demographic. Asian fast food still dominates the QSR sub-sector; however western fast food chains have experienced strong growth and are likely to continue to grow in future years as chains continue to open more and more outlets in Vietnam’s major cities. “Coffee house” culture continues to grow among Vietnamese youth and these venues are an important and growing outlet for imported bakery ingredients, syrups, and nuts. Vietnamese consumers are becoming more interested in Western cuisines or restaurants designed in Western styles. International and local tourists in Vietnam are expected to seek out food service outlets that can offer higher quality food items, and sophisticated menus and cuisines from different parts of the world in both major cities and Vietnam’s key provincial cities.

Institutional Contract: Catering service companies in Vietnam range from small to large-scale businesses and serve consumers such as airline caterers, industrial parks, and individual parties (e.g. weddings, birthdays). In recent years, catering companies serving customers in industrial parks have consumed a large volume of imported frozen chicken meat and pork due to cost competitiveness when compared with local sources of protein. However, outside of imported protein, Vietnamese catering companies source the preponderance of their food from local sources, due to low cost competitiveness relative to imports.

Trade Situation: In 2011, Vietnamese bilateral trade with the world grew substantially from 2010. Total bilateral trade (imports from and exports to the world) reached \$202 billion, a year-on-year increase of 30 percent. Total exports were valued at \$96.3 billion, an increase of 33 percent over 2010. Imports were valued at \$105.8 billion, an increase of 25 percent over 2010. In the first ten months of 2012, the Vietnamese bilateral trade deficit with the world was virtually erased for the first time in 10 years, exports reached \$93.5 billion, a year-to-year increase of 18.4 percent, while imports reached \$93.8 billion, an increase of 6.8 percent (Source: Vietnam General Statistic Office).

Consumption of imported consumer-oriented foods is expanding. Unofficial trade data indicates that Vietnam imported over \$1.8 billion in consumer-oriented agricultural products and \$300 million in edible fishery products as part of the estimated \$8 billion in agricultural, fish and forestry products imports in 2011.

Note: Given Vietnam’s porous borders and under-invoicing practices, it is difficult to estimate the actual level of consumer-ready food imports.

U.S. food products are favored by consumers for their high quality, safety, innovation, and consistent supply. Exports of high value and consumer-oriented U.S. agricultural and food products to Vietnam have seen rapid growth in recent years. After hovering around the \$20 million mark for several years,

exports grew to \$408 million in 2008, dropped to \$394 million in 2009 due to the global economic crisis, and then reached a new record of over \$697 million in 2011, an increase of 30 percent over 2010. However, due to continuing economic sluggishness, U.S. exports of consumer-oriented agricultural products in the first nine months of 2012 were only \$452 million, a slight decrease of 3.2 percent in comparison with the same period last year (see tables 1, 6, and 7 for more details). In the long term, U.S. exports of these products should continue strong growth as the Vietnam economy continues to grow; disposable income continues to increase, and the Retail, HRI, and tourist sectors continue to expand.

The best export prospects for U.S. consumer-oriented agricultural products include dairy products (including ingredients for manufacturing), chilled & frozen meat (beef and pork), frozen poultry, fresh fruits, dried fruits and nuts, snack foods, confectionary, packaged foods (canned fruit & vegetables, canned meat), condiments, juices, seafood, and alcoholic drinks (wine, beer, spirits).

Vietnam is nonetheless both an opportunity and a challenge for exporters. At times, the maze of seemingly conflicting regulations may seem a formidable barrier to trade, but the country is evolving and becoming more business-friendly. The improved economic environment owes much to Vietnam's integration into the global trade community. Vietnam is an active member of ASEAN, became the 150th member of WTO in January 2007, and has recently concluded Free Trade Agreements (FTAs) with many important trading partners including ASEAN, ASEAN-China, ASEAN-Korea, ASEAN-Japan, ASEAN-New Zealand-Australia, ASEAN-India, and Vietnam-Chile. These efforts have pledged to not just lower import tariffs, and eliminate quotas, but also to increase market access for goods and services, strengthen IPR protection, help enhance legislative and regulatory transparency as well as commercial dispute settlement and trade facilitation.

The following factors and demand drivers affect the food service market:

- Vietnam's economy has enjoyed remarkable growth in the past five years averaging 7.0 percent per year. During the current worldwide economic slowdown, Vietnam remains one of the five growing economies in Asia, but growth slowed to 5.9 percent in 2011 and is expected to further slow to 5 percent in 2012. With the economic slowdown, Vietnam's consumer market is expected to slow as well.
- Vietnam inflation was very high in 2011 (over 18 percent), which made consumer confidence weaker than previous years. In 2012, GOV set controlling inflation and stabilizing the economy the top priority. With strong effort from GOV, inflation has fallen below 10 percent in 2012.
- GOV continues to work towards market liberalization and further reforms to the legal, financial, and institutional systems as well as state-owned enterprises which limit overall growth potential and contribute uncertainty to the macro-economic climate.
- Due to the economic slowdown and macro-economic climate, many enterprises closed or went bankrupt during 2011-12. Bankruptcy cases were 49,000 in 2011 and are expected to reach 100,000 in 2012 (note: 53,000 enterprises were closed in the first six months of 2012 alone).
- Sectors of the Vietnamese economy were impacted unequally by the global economic crisis.

For example, expenditure on food and beverages (including retail) by Vietnamese consumers remained strong and, in fact, increased. The number of foreign visitors and foreign remittances also increased in 2011.

- Tourism and foreign remittance income are vital sources of foreign exchange for Vietnam. The tourist sector's revenue was estimated at US\$ 6.25 billion in 2011 and is expected to earn \$6.7 billion in 2012. In 2011, Vietnam also received \$9 billion in foreign remittance income from Vietnamese living abroad. Foreign remittance income in 2012 is expected to increase by 10 percent to reach \$10 billion.
- With a population of 88 million people, Vietnam has the second largest population in Southeast Asia and the 8th largest in Asia. The education level of the population continues to rise steadily and over half of the population is under 30 years of age. Both of these factors will drive demand for HRI food service in the future.
- Vietnam, with the smallest urban population in Asia (about 30 percent of the total population), has started seeing significant rural to urban migration as the economy becomes more industrialized and urbanized. New food outlets are appearing around newly constructed office and living spaces.
- Five key urban areas, Hanoi, Ho Chi Minh City (HCMC), Hai Phong, Danang and Can Tho, play a vital role in Vietnam's economy, accounting for over 30 percent of GDP.
- Vietnam has a large percentage of the female population in the workforce, especially within the 20-40 year old age bracket, making the female consumer ever more important.
- Vietnam's per capita GDP has doubled in the last 7 years, reaching \$1,350 in 2011. The Vietnamese urban middle- and upper-classes are emerging, and drive consumerism.
- Vietnamese urban consumers have busier lives, are dining-out more than before, and have greater demand for home food delivery service. Food service outlets are used for entertainment and socializing. Consumers pay more attention and concerns to food hygiene and safety when dining out.
- As of January 2007, foreign food service providers were 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.
- Franchising has become popular in Vietnam and is considered to be the fastest way for foreign food service providers to enter the market.
- Vietnamese brands are increasing their market share.

The key constraints to the development of the food service sector in Vietnam are low consumer income (despite recent gains), a very high cost of land rental in urban areas leading to fiercer competition for

locations, expensive electricity, competition from local production and other countries, the current worldwide economic situation, Vietnam economy slowdown, and continued threat of high inflation stifling incomes and consumer confidence.

Table 1: Advantages and Challenges Facing U.S. Products in Vietnam

U.S. Advantages	Challenges for U.S. Exporters
Increasing incomes and a rapidly-growing middle class enamored with American culture (music, movie, fashion) which carries over to American food.	Price-sensitive consumers. Significantly higher shipping costs and transportation time than Asia and Oceania.
U.S. foods are recognized as high quality items and great value for the price.	Strong preference to European (esp. French) and NZ/Australian foods due to America’s 20-year absence from this market.
Low level of competition from some U.S suppliers in the market.	Vietnamese urban dwellers are relatively slow to try new types of Western food.
Vietnam’s accession to WTO in 2007 has helped reduce tariffs on several food items and created a better business environment with more liberalized trading and service practices.	Still-relatively-high tariffs, cumbersome and excessive customs requirement; non-science based sanitary and phyto-sanitary requirements on animal, aquatic animal, and plant products persist and the regulations are slow to change.
	Low tariffs applied on food products imported from South East Asian (ASEAN) Countries; China, Japan, India, New Zealand, Australian, Chile under their respective Free Trade Agreements.
Growing number of western-style fast-food restaurant chains, bakeries and coffee shops, as franchising has been introduced, and the retail food sector now transitions to a more modern structure.	U.S. exporters are often not flexible enough or responsive to importers’ needs or the local business environment.
Growing rural to urban migration.	Limited infrastructure and distribution for perishable products (weak cold chain infrastructure)
USDA’s Guarantee Export Credit Program, called GSM 102, has been available for use in Vietnam since 2008. So far, nine Vietnamese commercial banks are eligible to use the program.	Limited/restricted supply of bank loans and foreign exchange as well more fluctuation between the U.S. dollar and the Vietnamese Dong could result in more risk for non L/C payment terms for sales of U.S. food products.

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

Further information regarding Vietnam’s policies and regulations relevant to importing food and agricultural products is available in the FAS-Hanoi’s [Vietnam Exporter Guide 2011](#) and the [FAS FAIRS Export Certificate Report](#).

Currently, the number of businesses specializing in supplying food and drink products directly to HRI food service sector is limited. There are fewer than ten professional companies serving this growing sector. Most of the current food and drink importers and distributors only do two steps of the distribution process; 1) importing the products and 2) delivering them to their wholesalers. They lack

the expertise and resources to deliver the products directly to end users (F&B managers at HRI food service outlets).

Vietnam's WTO commitment can pave the way for many foreign players to enter the HRI market, bringing innovative distribution and logistics techniques to the Vietnamese market. According to Vietnam's WTO accession agreement, as of January 1, 2009, wholly foreign-owned food service retailers and franchises may be established without the need for a Vietnamese partner or Vietnamese investment, as was previously the case. However, the government of Vietnam still reserves the right to determine the "economic need" for additional outlets beyond the initial one. International HRI entities entering Vietnam through a franchising agreement with a Vietnamese partner are not required to determine the "economic need" of additional outlets.

The best way for U.S. exporters of food and beverage products to enter the Vietnamese HRI market continues to be by appointing a local partner to directly import/distribute the products to the food service sector.

The appointed local partner should be responsible to obtain the widest distribution for the imported products, as well as perform the marketing efforts needed to create product awareness among customers and chefs. Business relationships with food service operators and chefs are very important for success, and therefore regular visits with local partners, as well as, with key food service players/retailers should be a priority.

It is critical for U.S. exporters to spend time and resources to study potential markets for products before initiating sales. They should also visit Vietnam to gain a first-hand feel for the market, preferably around the bi-annual Food & Hotel Vietnam Show (F&H VN) organized in Ho Chi Minh City (the next show is in April 2013). F&H VN is a USDA-endorsed trade show with a sizable U.S. pavilion. Exporters are encouraged to contact FAS-Hanoi or FAS-Ho Chi Minh City to assist with scheduling market briefings on the subsector the exporter is interested in and facilitating initial meetings with potential importers, major retailers, and key five-star hotel Food & Beverage (F&B) managers.

Business culture in Vietnamese is very different from the U.S. with many different customs. Some of the most important aspects to consider include:

- Vietnamese prefer face-to-face meetings in the initial stages, with additional follow-up visits, phone calls, emails and faxes when appropriate. Initial face-to-face meetings without follow-up visits rarely result in sales. Sending offers and quotations without first establishing a relationship (cold calls) is highly unlikely to result in sales.
- Some Vietnamese entities are concerned that U.S. suppliers do not take enough time to understand their particular needs and constraints in order to build a successful commercial relationship.
- Vietnamese businesses may exhibit strong interest at the outset of business discussions and then start to lose interest when faced with difficulties in implementing the details.
- Are more sensitive about price than quality.
- Most local businesses are small or medium size companies that rely on bank loans to run their business, with loan sizes varying according to collateral. In times of credit uncertainty,

obtaining loans can be problematic.

- Tend not to pay close enough attention to trade policies and import regulations. When import regulations change, they often do not have accurate information about the changes which results in misinterpretation of those changes. For more accurate information, always refer to FAS trade reports and/or check with the local FAS offices.
- Quite often seek exclusive import and distribution rights; deferred payment terms (always risky); and large marketing budgets on new deals and new-to-market products.
- Vietnamese companies specializing in food import and distribution may have investments in other businesses (e.g. real estate, car dealership etc.). In certain cases, the food business may receive less attention, particularly in areas such as checking and responding to emails in a timely manner. Given this divided focus, such firms may be less engaged or focus more on the business with the better return and could discontinue areas of their enterprise that are not doing well without notice or explanation.

Successfully introducing your products in the HRI market depends in large part on having a good local representative and an effective pricing strategy. The local partner should preferably be an importer and distributor capable of providing services to Vietnamese buyers (sales, delivery, and marketing) in both the food service and traditional/modern retail channels.

A food supplier wishing to reach all Vietnamese consumers must work with modern food service operations, catering companies, as well as the wholesalers, street stalls/kiosks, small size independent outlets, open-air wet markets, and small shops. While HCMC, Hanoi, Haiphong, Danang, and Can Tho have a growing number of modern outlets, much of the country still relies heavily on traditional marketing channels. U.S. exporters who wish to reach their full potential in the Vietnamese market must service both the modern and traditional channels.

U.S. exporters should consider the following before selecting an agent/a business partner:

- The agent/ business partner must have a good relationship with major food service operators (especially the F&B managers at higher-end hotels); major retailers; and an ability to deal with local regulators.
- The agent / business partner must have expertise in setting up a distribution network.
- U.S. firms should evaluate all distributor prospects, and thoroughly research the more promising ones. Check the potential agent's reputation through local industry/trade associations (e.g. the American Chamber of Commerce in Ho Chi Minh City), potential clients, bankers, and other foreign companies.
- FAS-Vietnam maintains extensive lists of potential importers, which U.S. exporters are welcome to review.

Note: As the number of businesses specializing in distributing food and drink products to the food service sector is small, face-to-face meetings with all of them does not consume a lot of time. A three-day visit to the market to meet with potential distributors would be worthwhile.

B. MARKET STRUCTURE

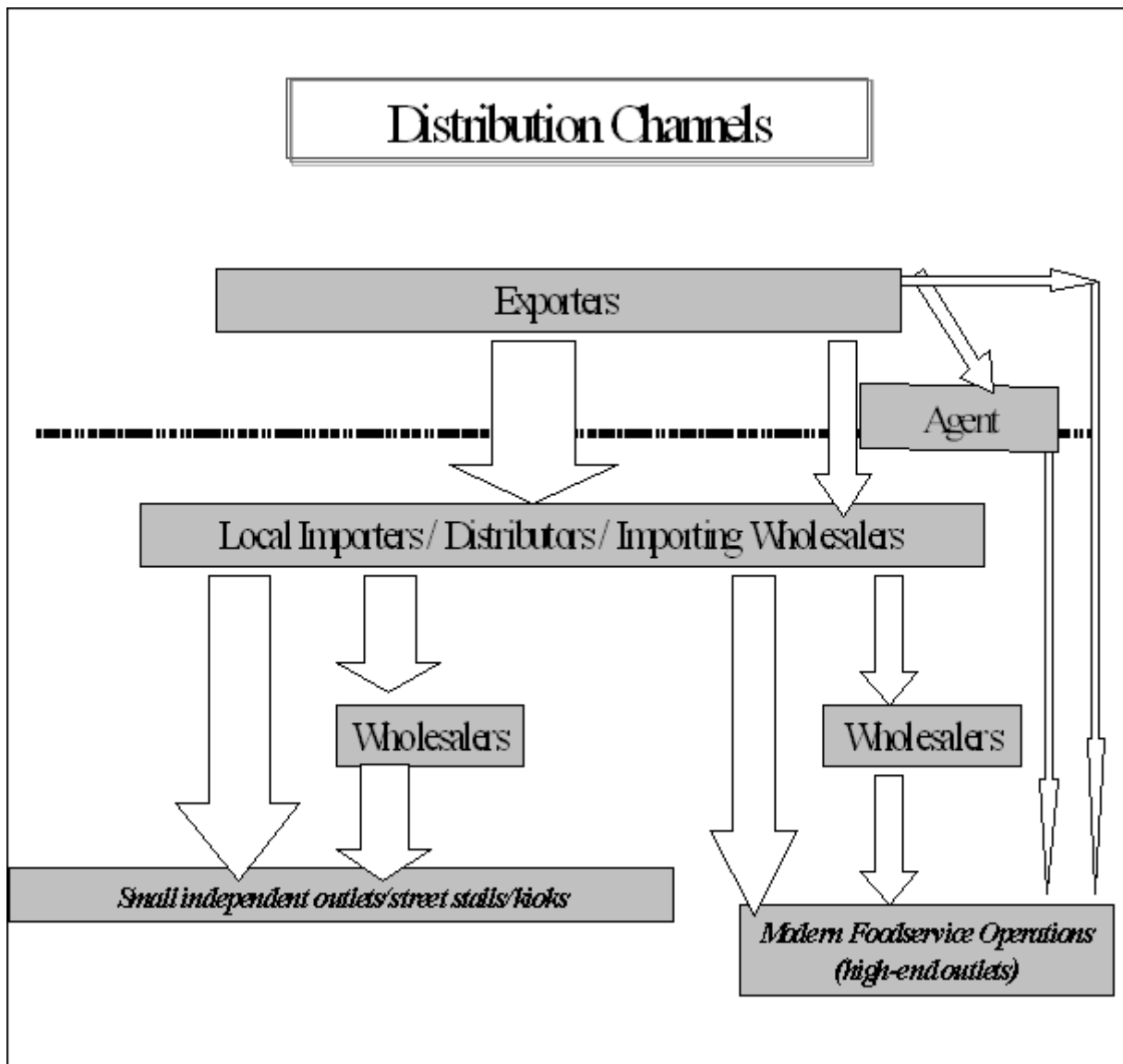


Figure 1: Distribution channels of imported food into Vietnam

Distribution of imported foods follows one of the four basic models:

- 1) Exporters → Importers/Distributors → major food service operations
- 2) Exporters → Importers/Distributors → Wholesalers → food service operators and outlets
- 3) Exporters → Local Agent → Importers/Distributors → Wholesalers → food service operators and outlets
- 4) Exporters → Big food service chain (KFC, Lotteria, Jolibee, Pho 24, Trung Nguyen, Highlands Coffee)

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

Due to relatively low purchasing power and limited access to extended trade financing, most food service operations buy imported food and drink products through importers/distributors. Only a few big chains like Lotteria, KFC have tried buying directly from foreign suppliers.

Vietnam’s limited distribution infrastructure and facilities for perishable products is a significant constraint to importing products. The distribution systems are often equipped with out-of-date technology, and transport products using inadequate or fragmented cold chains.

C. SUB-SECTOR PROFILES

Hotels and Resorts: The number of hotel rooms in Vietnam has tripled since 2004. In 2011, the country had 12,500 hotels and guesthouses with a total of 250,000 rooms (from standard to five-star hotels). Of the total, there are 53 five-star (12,120 rooms); 127 four-star (15,517 rooms); and 271 three-star hotels (18,855 rooms) (See Table 2). It is expected that the number of hotels and guesthouses could reach more than 13,000 (270,000 rooms) in 2012 due to strong investment from both local businesses and foreign invested businesses in this field.

There has been a significant increase in the number of resorts along Vietnam’s beautiful coastal areas over the last 5 years. Many resorts have been built in Ba Ria, Vung Tau, Mui Ne, Nha Trang and Da Nang, and Vietnam reportedly now has over 100 resorts nationwide. New projects to develop hotels, resorts, and golf courses continue to be approved by the Vietnamese government despite the worldwide economic downturn. The growth in the number of high-end hotels and resorts also helps spur demand for imported high-quality foods and drinks.

Table 2: Vietnam hotel types and number of rooms in 2010 and 2011

	2010		2011	
	Units	Number of rooms	Units	Number of rooms
Totals, of which:	12,000	235,000	12,500	250,000
5-star	31	8,196	35	8,810
4-star	90	10,950	95	11,628
3-star	175	12,524	184	13,168
2-star	710	27,300	N/A	N/A
1-star	850	19,000	N/A	N/A
Standard	3,000	44,030	N/A	N/A

Source: Vietnam Administration of Tourism

The majority of international tourists arrive to Vietnam by air. Vietnam has only three international airports, namely Tan Son Nhat in Ho Chi Minh City; Noi Bai in Ha Noi; Da Nang Airport in the central of Vietnam. These airports have been recently upgraded to meet with the international standards.

With over 3,000 km of coastal waterways, Vietnam is an ideal place to receive tourists via cruise ship. Over the last three years, the number of cruise ships bringing tourists to Vietnam has increased.

According to unofficial reports, about 100,000-150,000 tourists come to Vietnam by sea annually.

Main destination ports are Saigon port, Quang Ninh port, Da Nang Port, and Phu My Port.

Table 3 is a partial list of some of the five star hotels, and resorts that are currently operating in Vietnam. Most of the hotels source their food and beverage products from a combination of importers, distributors, and local sources. The American Chamber of Commerce in Vietnam is a valuable source of information and provides company profiles and contact information for some of the companies in Table 3 (<http://www.amchamvietnam.com/>).

Table 3: Partial list of Five-Star Hotels in Vietnam

Company Name	Hotel Name/ Number of Locations
Van Thinh Phat	Windsor Plaza Hotel, HCMC; 6 restaurants in HCMC, Sherwood Residence Building
Caravelle	Caravelle Hotel, HCMC
Hyatt	Park Hyatt Saigon, Hyatt Regency Danang
Accor Asia Pacific	Brands include Sofitel (4 locations), Novotel (4 locations), Mercure (4 locations), La Residence Hotel & Spa in Hue
Victoria Hotels & Resorts Group	Sapa, Hoi An, Phan Thiet, Can Tho, Chau Doc, Siem Reap (Cambodia)
Sheraton	Sheraton Hanoi Hotel; Sheraton Saigon Hotel & Towers; Sheraton Nha Trang Hotel & Spa
Celadon International	Green Island Hotel, Danang; The Imperial Hotel and Apartments, Vung Tau; Celadon Palace, Hue; Celadon Lighthouse Plaza, Nha Trang
Equatorial	Hotel Equatorial, HCMC
Life Resort	Qui Nhon, Danang, , Hoi An, Halong, Phan Thiet
New World Hotel	New World Hotel, Saigon, HCMC
InterContinental (IHG)	Hanoi Landmark; Hanoi Westlake; Asiana Saigon, HCMC; Asiana Saigon Residences, HCMC; Crowne Plaza Tây Hà Nội.
Majestic	Hotel Majestic, HCMC
Mariott	Renaissance Riverside Saigon, HCMC & the Mariott in Hanoi
Swiss BelHotel	Golden Sand Resort & Spa, Hoi An; Mithrin Hotel, Halong Bay
Movenpick Hotel	Hanoi; HCMC

With a sizeable expatriate community (especially in Hanoi and HCMC), growing international visitor traffic, and rising disposable income for Vietnamese consumers, the number of high end hotels and resorts and demand for high value food products should continue to grow in the coming years.

Restaurants: A combination of strong economic growth, strong tourism growth, rising disposable income, a growing middle class, a sizeable young population, and an increasing exposure to a Western lifestyle are fueling growth of the restaurant sub-sector in Vietnam. Over the last five years (2006-11), consumer food service sales in Vietnam achieved an average growth of 8.8 percent per year. Food service sales are expected to continue growing over the next five years, although at a lower rate. Vietnamese consumers are becoming more interested in Western cuisines or restaurants designed in Western styles. More consumers in urban areas are shifting from eating at the ‘traditional small outlets’ to ‘modern’ high-end outlets.

Table 4: Vietnam’s estimated consumer food service sales over the past six years

	2006	2007	2008	2009	2010	2011	Averaged growth (%) over the period
Total outlets (1,000)	496.8	514.9	528.6	536.2	543.0	549	
Turnover (VND Trillion)	346.6	389.2	432.9	465.0	499.8	500.6	8.8
Turnover (USD billion equivalent)	21.67	24.18	25.97	26.15	26.21	24.26	

Source: Euromonitor data, Fix Exchange Rate, and Post Estimates

Nationwide consumer food service sales were estimated at \$24.26 billion in 2011. The restaurant sub-

sector continues to expand due to strong demand from both Vietnamese urban consumers and foreign tourists. The food service sector is expected to see further development in terms of growth and sophistication. For example, the number of outlets should continue to grow due to demand in new urbanized areas. Tougher competition will cause most outlets to diversify their menus, offering new items to customers. Services are expected to be more diversified and professional, and marketing efforts should be more focused.

Eating habits have changed and eating out is more popular for busy Vietnamese urban customers. Family-owned individual small food service outlets (street stalls/kiosks, small restaurants, small catering companies) continue to dominate the food service market, often locally sourcing their products from wholesale wet markets. However, urban customers visit modern food service outlets more often than before to socialize with friends and/or business partners. As incomes increase, people increasingly demand more sophisticated food and drink menus at higher-end restaurants.

Urbanization will pave the way for modern outlets to develop in Vietnam. New living areas and office buildings will lead to greater demand for modern retail and food service outlets. Many foreign investors have launched large scale construction projects in Vietnam which will further drive urbanization in the country. The Government of Vietnam has also encouraged urbanization, approving a large number of construction projects of new residential areas, office buildings, shopping centers, and supermarkets in major cities and provinces.

Quick Service Food (QSF) is perceived as a modern concept, and has grown substantially the last three years. After a long period of striving for success in Vietnam, multinationals such as KFC, Lotteria, and Jollibee have started to turn a profit. In two-years time, KFC and Lotteria have doubled their numbers of stores in Vietnam. Each currently has over 120 outlets in Vietnam. Newcomers, including Carl’s Junior, Subway, Popeyes, and Burger King, have also opened a few outlets. McDonald’s has also visited Vietnam with an eye towards opening it’s first stores in the country. QSF outlets associated with Western eating habits have become popular among students, young office workers, teenagers, and children. The number of coffee chain outlets (e.g. Highlands Coffee, Trung Nguyen Coffee Company, Gloria Jean’s, Coffee Bean & Tea Leaf etc.) has also increased in the last four years. Independent Western and Asian restaurants have also seen rapid growth. Table 5 provides a list of QSF brands in Vietnam.

Although domestic players continue to dominate food service in Vietnam, competition between domestic players and multinationals has become intense. Chained outlets have seen faster growth due to the improvement in legislation and regulation relating to franchising and the consumer perception that food served at chains is of better quality.

Table 5: Restaurant Company Profiles

Company Name	Outlet Name, Type, & Number of Outlets	Cuisine Type	Location	Purchasing Agent(s)
Yum! Brands	KFC Viet Nam, Quick-Service Restaurant (130) Pizza Hut (22)	QSF Western fast food	National	Importers, distributors, local sourcing of products
Jollibee	Jollibee, Quick-Service Restaurant (50)	QSF Western fast food	National	Importers, distributors, local sourcing of products

Nam An Group	Pho 24, Food service and beverages (60)	Vietnamese	National	Importers, distributors, local sourcing of products
Trung Nguyen Coffee Company Ltd.	Trung Nguyen Coffee Company (many small outlets, over 1,000)	Cafeteria	National	Importers, distributors, local sourcing of products
Viet Thai International Joint Stock Company	Highlands Coffee (80), Full- service restaurant Hard Rock Café (1)	International Cafeteria; western food	National	Importers, distributors, local sourcing of products
Vietnam Lotteria Company Ltd.	Lotteria (120)	Western fast food	National	Importers, distributors, local sourcing of products
Al Frescos Group (Institutional)	Jaspas (4), Al Frescos (11), Pepperonis (11), Papa Joes (4)	International/ Western Asian fusion	Hanoi, Ho Chi Minh City	Importers, distributors, local sourcing of products
Van Thinh Phat (Hotel, Restaurant, Institutional)	Windsor Plaza Hotel, Sherwood Residence, restaurants (6)	International and Vietnamese	Ho Chi Minh City	Importers, distributors, local sourcing of products
Imex Pacific	Burger King (5) Domino Pizza (3) Popeyes (1)	QSF Western Fast Food	National	Importers, distributors, local sourcing of products

Sales results at “high-end outlets” (high-end full service restaurants, fast food chains, cafes/bars and catering services) is still small but growing fast. While it currently has a relatively small share of total food service sales, high-end outlets should continue expanding over the next five years.

As mentioned in the market summary, key constraints to the development of the food service sector in Vietnam include low consumer income (despite recent gains), very high cost of land rental in urban areas leading to fierce competition for locations, expensive electricity, and the current worldwide economic slowdown.

Fierce competition in the restaurant sub-sector, especially between chains and independent / standalone outlets has pushed operators to broaden the variety of services available (e.g. newspapers, free Wi-Fi internet, shoe polishing, etc). Recent years have seen an increase in extensive advertisement and promotions, both meant to attract new customers and to maintain the interest of existing customers.

Below are the trends in the Restaurant sector:

- Urbanization and franchising will pave the way for modern outlets to develop.
- Diversification is likely to be a key trend as Vietnam sees increasing urbanization. More outlets have increased the amount of food services offered, especially during breakfast and lunchtime. This trend is especially evident in cafés/bars that traditionally only offered drinks, where food now accounts for over 20% of total sales.
- Increased attention to location and decor of the outlets. Outlets will be designed to promote convenience and a relaxing environment for customers.
- More value-added services will be offered. Take-away service and free Wi-Fi internet access are offered at many modern food service outlets.
- Large buildings (housing offices, residences, and supermarkets) often have dedicated spaces for a variety of food service operations.
- Cafeterias with big kitchens and modern interior decor can be found almost everywhere in

major cities.

- Many new food service operations are opening, not only in major cities, but also in provinces receiving tourists and through urbanization projects. The growing tourist industry is pushing more provinces to develop their modern service sectors, including the food service sector.
- The leading food service chains continue to expand across Vietnam. Fast food chains are expected to open outlets in smaller cities as well.
- A wide range of new tastes and eating habits will be introduced. More sophisticated taste for a wider assortment of products is expected to develop.

Institutional: Catering businesses range from small to large-scale businesses and are categorized to serve the following customer groups: airline caterers, industrial parks, individual parties (wedding, birthday). These catering services use both local and imported food products, depending on their customers' requirements. Imported products, include chicken meat, pork meat, French fries, sauces and seasonings, cheese, fresh fruits & vegetables, and seafood.

Note: in recent years, catering companies serving customers in many industrial parks consume a large volume of imported frozen chicken meat and pork.

SECTION III. COMPETITION

Vietnamese consumer confidence in Western products is high. The Chinese milk scare in 2008 and subsequent food safety scares have caused concern among Vietnamese consumers and fosters an awareness of food quality and safety. The perception of American-made goods is one of premium quality and should continue to be a characteristic emphasized when promoting U.S. products. Vietnam's trade infrastructure and general level of economic development are expanding quickly but are still undeveloped even when compared to most of its Southeast Asian neighbors. Brand awareness remains similarly undeveloped. U.S. products will therefore face varied opportunities and challenges. Establishing an early base during Vietnam's developing stage is essential for future success.

The biggest competitors for U.S. foods in the food service market are France, Australia, New Zealand, South America (Argentina, Chile etc.); some ASEAN countries; China and the local food industry. It is important to note that most food products from China and other ASEAN countries enjoy lower tariffs than U.S. products. Table 6 shows competitors for Vietnamese import market share for selected consumer-oriented agricultural products.

Table 6: Competition for U.S. Exports to Vietnam (Selected Products):

Product Category	Major Supply Sources and Total Value of Exports in 2011 (thousands of dollars)	Strengths of key Supply Countries	Advantages and Disadvantages of Local Suppliers
Poultry Meat	USA – 99,415 Brazil – 10,000 Korea – 7,000	Thailand is much closer to the Vietnamese market and has cheaper shipping costs. USA poultry products are considered to be of consistent supply and of high quality.	Vietnamese consumers are accustomed to the taste of local chicken. Accustomed to buying chicken from the wet market.
Red Meats	India (includes buffalo)	USA beef products are	Local pork industry is

Fresh/Chilled	58,000 Australia - 21,000 USA – 199,000*	believed to be of consistent high quality. Canadian and Australian red meats also are perceived by consumers to be of high quality. Price of Buffalo meat from India is very reasonable in comparison to the local bovine supply	very strong. In general, local pork is cheaper than imports. Local beef production is limited and its quality is not great. Aslo local beef prices have been increasing recently.
Snack Foods	Indonesia- 60,000 Philippines - 20,000 Thailand – 12,000	Many big name snack food brands have processing facilities throughout Asia and export their product from those countries.	Local industry is still small but growing fast
Fish and Seafood Products	Norway – 33,000 Japan – 30,000 USA – 16,000	Many of these competitors benefit from proximity to Vietnamese market. Norway supplies mainly salmon, and flatfish and groundfish. USA supplies mainly crustaceans.	Local production is very strong in seafood from tropical climates like catfish, tiger shrimp, Tuna etc.
Fresh Fruits	China – 70,000 Thailand – 39,000 USA – 37,000	Competitors like China and Thailand enjoy lower price levels and proximity to the Vietnamese market.	There is a wealth of fresh fruits available to Vietnamese consumers from the local market.
Fruit & Vegetable Juices	Australia – 2,000 USA – 2,800 Brazil - 2,750	Made-in-USA is a symbol of high quality and consumers appreciate the quality of US juices. Australian juices currently proximity and ease of transport. Juices imported from South Africa and SEA countries are more competitive than US juices.	Fresh-made juices are popular in Vietnam and more preferred to bottled juices.
Fresh Vegetables	China - 132,100 USA - none reported	China enjoys proximity and low import duty for vegetables to the Vietnamese market. U.S. trade in this area is underdeveloped.	There are a lot of local fresh vegetables available. Vietnamese consumers are accustomed to buying fresh vegetables from the wet market.
Processed Fruit & Vegetables	China – 32,000 USA – 15,000 Malaysia – 3,500 Thailand - 3,000	Top competitors enjoy proximity to the Vietnamese market.	Non-tropical fruits are imported from other countries.
Tree Nuts	Australia – 7,300 USA – 2,000	Australia enjoys proximity to the Vietnamese market. USA products are different than what is available locally.	Cashew is the predominant local tree nut available.
Wine	France – 6,200 Chile 4,600 Australia 2,000 USA – 2,000	Strong preference for French wine and Chilean wine.	Local wine industry is still very young stage
Beer	Thailand – 5,000 German- 900 USA – 445	Netherlands, through Heineken, enjoys the highest awareness among Vietnamese	Local beer production has strongly expanded as a result of a great deal of

		consumers. US beer, through Budweiser, has become more popular in urban areas of Vietnam.	foreign investment. Brands are Saigon beer, Hanoi beer, Heineken (locally produced), Tiger, San Miguel, etc.
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Source: Vietnam Customs Data, World Trade Atlas, USDA/BICO reports

*Represents total red meat exports landed in Vietnam, may not represent U.S. red meat consumption in Vietnam.

SECTION IV. BEST PRODUCT PROSPECTS

Table 7 shows annual U.S. export growth in the Vietnamese market, import tariff rates, key market development constraints, and market attractiveness for U.S. exporters of selected products. Many of the selected U.S. exports experienced growth in 2011 but have declined in the first 9 months of 2012 due to the economic downturn. However, some products, including tree nuts, eggs and egg products, fresh fruit, processed fruit and vegetables, wine and beer, and other consumer oriented products (primarily frozen food preparations) enjoyed positive growth during the first 9 months of 2012. Overall U.S. exports of consumer oriented food products has declined 4 percent in the first 9 months of 2012, compared to the same period in 2011.

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

U.S. chilled and frozen meats are currently present in the Vietnamese market and have had spectacular growth over the last few years. While the worldwide and Vietnam economic downturns may reduce demand for these products in the short-run, chilled and frozen meat continue to have good sales potential. Other U.S. products that are already present in the Vietnamese market and continue to have good sales prospects include dairy products, fresh fruit, dried fruits and nuts, beer and wines. The next most important U.S. sales items in the food service sector are processed fruit and vegetables and other canned foods (mixed fruit cocktail and canned meat). Some of the best selling processed foods include frozen French fries, snack food (potato chips); biscuit/crackers, popcorn, baby foods, condiments (dressing, sauces), beer and wine.

B. Products Not Present in Substantial Quantities, Which Have Good Sales Potential

There are good opportunities for sales of other U.S. high value items. Many of these are not yet in the market in significant quantities. These include pears, cherries, snack foods (other than potato chips), dried fruits (other than raisins) and nuts (mainly almonds and pistachios), fresh potatoes, fruit juices, and chocolate.

C. Products Not Present, Which Face Significant Trade Barriers

American products that have not sold well in Vietnam include cheese and bourbon whiskey, to name a few. Whiskey faces a high import duty and public advertising restrictions which make it difficult to develop brand awareness. Vietnam is now a growth market for imported cheeses, as the QSF subsector is growing fast and consumer demand for cheese is increasing. However, French, New Zealand, and Australia dominate the cheese due to consumer preference and geographic proximity. Awareness of U.S. cheese quality and supply among chefs and consumers remains limited. However, due to the meteoric rise of the QSF sector in Vietnam, there remains major potential for U.S. cheese products.

Table 7: Product Prospects in the Vietnamese HRI Food Service Market

Products	Impor	2011's	2011's	2011	US	%	Key	Market
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	Import Duty	estimated Vietnam Import (\$1,000)	U.S. Exports (\$1,000)	Market share of U.S. (%)	Exports Jan-Sep 2012	Growth over Jan-Sep 2011	Constraints over market development	Attractiveness for US products
Cheese	10%	18,000	360	2.0	263	46	Strong competition from New Zealand and Australia	No domestic production. Recent reductions in import tariffs. Young consumers drive cheese demand. Western-styled Fastfood Restaurant Sector is growing fast
Popcorn (HS100590)	5%-30%	1,200	668	55.7	692	72	Strong competition from Argentina	Young consumers drive popcorn demand. Popcorn becomes more popular. Growing number of modern cinemas in urban area and growing number of modern retail outlets support US popcorn sales
Condiments (HS2103)	32%	25,000	650	2.6	591	4	Strong competition from SEA and Australian products and also from US brands which are made outside of the US.	The growing HRI, especially fast food sector, and growing retail sector strongly support US condiment sales.
Wine	50%-55%	20,000	21,680	NA	13,103	21	There are a variety of low priced, locally produced wines and heavy import tariffs. Strong competition especially from France and Italy, and Chile, Australia, South Africa, and Argentina.	More and more consumers prefer wine than beer and spirits. More dining out. Fast growing HRI sector and retail sector.
Vegetable Preparation	15%	3,000	1,660	55.3	1,157	-3	Domestic availability	More and more dining

(mainly potatoes -HS 2004)							of potatoes. Competition from Holland and Belgium. Fragmented cold chain, inadequate handling.	out. Fast growing HRI sector, especially QSF fast food, and retail sector.
Beer	35%	9,000	445	4.9	453	465	There are a variety of low priced, locally produced beers and heavy import tariffs. Strong competition from Holland, Germany, and SEA countries.	One of the fastest-growing sectors in Vietnam's
Raisin (HS 080620)	12%	5,491	4,312	78.5	2,650	83	Strong competition from China. Need considerable market development for other dried fruits	Raisins are increasingly popular. Potential for marketing other dried fruit (e.g. cranberries) especially as inputs for baked goods.
Snack Foods, Cookies, Chocolates	12% -40%	120,000	8,452	7.0	6,060	20	Subject to stiff import tariff rates (averaging 32 percent). Expensive for many consumers.	Potato chips, nuts, biscuits, and cookies are especially popular.
Fruit Juice (HS 2009)	20% -35%	12,000	3,170	26.4	1,867	-23	Competition from Australia, South Africa, and SEA countries.	Consumption of juices is increasing as consumers are paying more attention to maintaining a healthy diet.
Apple (HS 080810)	10%	45,000	17,857	39.7	8,882	11	Domestic availability of fresh fruit. Fierce competition from China, Australia, New Zealand, South Africa, and Chile. Fragmented cold chain, inadequate handling.	Apples from USA, especially from Washington State are becoming increasingly popular.
Pork Meat	10% -25%	10,000	6,732	67.3	2,653	-47	Domestic availability of pork	Pork meat consumption will continue

							meat. Competition from Canada. Fragmented cold chain, inadequate handling.	to increase due to increasing population, growing food processing sector and also HRI.
Whiskey & Spirits (HS2208)	48%	40,000	8,256	20.6	14,743	125	There are a variety of low priced, locally produced spirits and heavy import tariffs. Strong competition from France, Scotland.	Increasing middle class and improving disposable income drive demand for whiskey and spirits, more and more clubs and bars operate in urban area.
Table Grapes (HS 080610)	10%	32,000	15,864	49.6	8,653	19	Domestic availability of fresh fruit. Fierce competition from China, Australia, South Africa, and Chile. Fragmented cold chain, inadequate handling.	Grape from USA is well-known for its high quality and its consistent supply.
Food Preparation, Functioning Foods (HS 2106)	5%-20%	120,000	29,632	24.7	25,063	39	Competition from Australia, New Zealand and EU.	Consumers concern more about food safety and health, which drives more demand for nutritional and healthy products.
Seafood (HS 0302-0307)	10%-20%	300,000	37,945	12.6	20,988	-13	Imports of seafood face stiff health inspection requirements.	increasing middle class and improving disposable income drive demand for more sophisticated and fancy seafood like lobster, king crab, codfish etc. more and more high-end seafood restaurants operate in urban area. Fast growing seafood processing sector.
Nuts	10%-30%	17,000	88,000	N.A	67,671	193	Subject to stiff import tariff rates. Still	Pistachios nuts are especially popular.

							expensive for many consumers.	Almond nuts are healthy products. Fast growing bakery sector.
Poultry meat (HS)	20% -40%	120,000	99,415	82.8	47,607	-36	Imports face stiff health inspection requirements. Subject to high tariff of at least 20%.	Demand for reasonable-priced dark-meat, e.g. leg quarters, drumsticks and wings continue to grow due to increasing population and strong demand from food catering sector
Dairy products (HS 0401; 0402 & 0404) incl. lactose	0%-15%	600,000	187,385	31.2	104,500	-34	Strong competition from New Zealand and Australia. Stiff health inspection requirements.	Domestic milk production is small. Recent reductions in import tariffs. Consumers, especially children and young people consume more milk than before.
Beef Meat	14% -35%	15,000	188,978*	NA	136,488	8	Imports face stiff health inspection requirements.	US beef is well-known for its quality and its taste. US beef demand is driving by increasing middle class and improving disposable income. Demand for reasonable-priced beef cuts (secondary cuts) will show strong growth in the near future due to increasing limited domestic supply.
TOTAL CONSUMER-ORIENTED FOOD IMPORTS		1,800,000	697,184	39	452,286	-3	High tariffs, Stiff Health Inspection Requirement, Stiff Food Quality Registration; uncertain economy	In a long term view: fast growing economy, increasing middle class, increasing disposable income, growing HRI

								sector, Retail Sector and, Food Processing Sector.
TOTAL CONSUMER ORIENTED & EDIBLE FISHERY IMPORTS		2,100,000	735,128	35	473,275	-4		

Source: USDA/BICO, World Trade Atlas, Vietnam Customs Department

*Represents total red meat exports landed in Vietnam, may not represent U.S. red meat consumption in Vietnam.

SECTION V. POST CONTACT AND FURTHER INFORMATION

U.S. Department of Agriculture / Foreign Agricultural Service

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 provides information about the staff, resources, and programs coordinated by FAS to promote international trade.

State Regional Trade Groups

The State Regional Trade Groups (SRTG) are four regionally focused, non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. USDA's Foreign Agricultural Service, (FAS) State Departments of Agriculture and the industries fund the SRTGs. These organizations carry out promotional activities that help to increase exports of U.S. high-value food and agricultural products. Activities of these organizations are directed by state departments of agriculture and state agricultural promotion agencies and are coordinated with FAS offices in Washington and overseas. Activities 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 SRTGs also administer a cost-share funding program called the "Branded" program, which supports promotion of brand name foods and agricultural products in overseas markets.

The SRTGs are the Western U.S. Agricultural Trade Association, (WUSATA) in Vancouver, Washington; the Food Export Association of the Midwest in Chicago, Illinois; the Southern U.S. Trade Association (SUSTA) in New Orleans, Louisiana; and Food Export USA-Northeast in Philadelphia, Pennsylvania. Refer to FAS' website for more details.

http://www.fas.usda.gov/agx/counseling_advocacy/srtg_directory.asp

FAS Cooperators and Participants

American food and agriculture industry benefits from a large number of associations and organizations that support export market development. These groups, referred to by FAS as '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

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Key Government Contacts

Ministry of Cultural, Sports, and Tourism

Vietnam National Administration of Tourism (VNAT)

No 51 Ngo Quyen Street, Hoan Kiem District, Hanoi

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Contact Mr. Nguyen Van Tuan, General Director

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163, Hai Bà Trưng, Ward 6, District 3, HCMC

Office 2 : 59-61 Lý Tự Trọng District 1, TP.HCM

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Website: <http://www.congthuong.hochiminhcity.gov.vn>

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2 Ngoc Ha Street, Ba Dinh, Hanoi, Vietnam

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MARD: National SPS Notification and Enquiry office

Room 105a, A10 Building, MARD, No.2 Ngoc Ha Street, Ba Dinh, Hanoi

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MARD: Plant Protection Department (PPD)

149 Ho Duc Di Street, Dong Da District, Hanoi, Vietnam

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MARD: Department of Animal Health-Regional Animal Health Office No. 6

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Contact: Mr. Nguyen Xuan Binh, Director

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59 Nguyen Thi Minh Khai St, District 1, Ho Chi Minh City, Vietnam
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Contact: Dr. Le Truong Giang, Deputy Director

MOH: Department of Food Safety and Hygiene Ho Chi Minh City
59 Nguyen Thi Minh Khai, District 1, HCMC
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Mr. Huynh Le Thai Hoa, Director
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Vietnam Directorate For Standards and Quality (STAMEQ)
8 Hoang Quoc Viet, Nghia Do, Cau Giay, Ha Noi
Tel: 844-3791 1606
Email: vptdc@tcvn.gov.vn
Website: <http://www.tcvn.gov.vn>
Contact: Mr. Ngo Quy Viet, General Director
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Website: <http://www.quatest3.com.vn/>
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Ministry of Planning and Investment (MPI)

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MPI: Center for Investment Development in the South

178 Nguyen Dinh Chieu, Street, District 3, HCMC
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MPI: HCMC's Department of Planning and Investment

32 Le Thanh Ton Street, District 1, HCMC, VN
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General Department of Vietnam Customs

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Contact: Mr. Nguyen Ngoc Tuc, General Director
Website: <http://www.customs.gov.vn>

General Department of Vietnam Customs – Southern Rep. Office

15B Thi Sach Street, Ben Nghe, District 1, HCMC
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Department of Customs in Ho Chi Minh City

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Website: www.amchamvietnam.com

Useful Vietnamese Websites:

Note: Most Vietnamese websites contain both English and Vietnamese documents.

The Embassy of Vietnam in Washington <http://www.vietnamembassy-usa.org>

Ministry of Agriculture and Rural Development <http://www.agroviet.gov.vn/en/Pages/default.aspx>

MARD/Department of Animal Health <http://www.cucthuy.gov.vn>

MARD/Plant Protection Department <http://www.ppd.gov.vn>

MARD/ National Agro-Forestry-Fisheries Quality Assurance Department <http://www.nafiqad.gov.vn>

Ministry of Health <http://www.moh.gov.vn>

Vietnam Food Administration <http://vfa.gov.vn>

General Department of Vietnam Customs <http://www.customs.gov.vn/English/Default.aspx>

Directorate for Standards, Metrology & Quality www.tcvn.gov.vn/ or <http://en.tcvn.vn>

Ministry of Industry & Trade <http://www.moit.gov.vn>

HCMC Department of Planning & Investment:
<http://www.dpi.hochiminhcity.gov.vn/invest/index.html>

Vietnam Tourism Administration http://www.vietnamtourism.com/e_pages/news/index.asp

National Assembly of Vietnam <http://www.na.gov.vn>

Ho Chi Minh City's Website <http://www.eng.hochiminhcity.gov.vn/eng/news/>

Vietnam Ag Biotechnology <http://www.agbiotech.com.vn>

Yellow Pages <http://www.yellowpages.vn/indexus.php?flag=1>

American Chamber of Commerce in Vietnam <http://www.amchamvietnam.com>

Major Media Websites:

Vietnam News <http://vietnamnews.vnagency.com.vn/>

Vietnam Economy News <http://news.vneconomy.vn/>

Vietnam Investment Review <http://www.vir.com.vn/news/home>

Saigon Times Daily <http://english.thesaigontimes.vn/Home>

Saigon Times Weekly <http://www.thesaigontimes.vn/epaper/SGTW/>

Saigon TiepThi <http://www.vnnnews.net/tag/saigon-tiep-thi>

Tuoi Tre News <http://www.tuoitrenews.vn/>

Thanh Nien News <http://www.thanhniennews.com/Pages/default.aspx>