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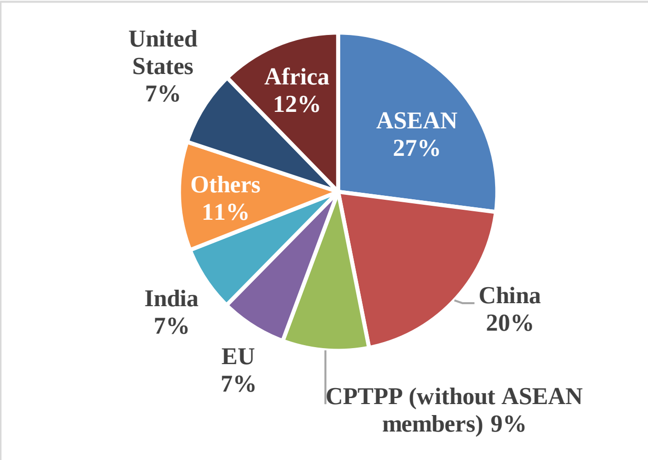
Report Highlights:

This report serves as a practical guide for U.S. exporters seeking to initiate or increase exports of U.S. consumer-oriented products to Vietnam. It provides an overview of the market potential, practical tips, consumer preferences and trends, food standards and regulations, import and inspection procedures, and key industry and government contacts.

Market Fact Sheet: Vietnam

Executive Summary

In 2025, Vietnam's gross domestic product (GDP) grew 8.02 percent year-on-year to approximately $514 billion. Consumer-oriented imports grew at a slower pace than total imports – 6.0 percent versus 19.4 percent, respectively. U.S. consumer-oriented exports to Vietnam rose 10 percent year-on-year to $1.28 billion, driven by strong demand for tree nuts and dairy products.



Source: Trade Data Monitor, LLC
ASEAN: Association of Southeast Asian Nations
CPTPP: Comprehensive and Progressive Agreement for Trans-Pacific Partnership
EU: European Union

Retail Food Industry

Food retail sales in 2024 grew by one percent, reaching $55.5 billion. Despite ongoing economic uncertainty, key retailers continued to invest in Vietnam's retail market and announced ambitious plans for expansion in the coming years. See the Retail Foods report VM2025-0034 for more information.

Hotel Restaurant and Institutional (HRI) Industry

Vietnam's food service sector performed strongly in 2024, with more than 323,000 outlets generating $26.6 billion in sales, according to Euromonitor. Please see the most recent HRI GAIN report VM2025-0052 for more details.

Food Processing Industry

Vietnam's food processing industry reached $88 billion in 2025, growing 11 percent year-on-year as processors expanded beyond re-exports to meet rising domestic demand. For more details, please refer to GAIN report VM2026-0004.

Quick Facts 2025

Imports of Consumer-Oriented Products: $16.7 billion

List of Top 10 Growth Products in Vietnam (2025/2024)

1) Tree nuts	6) Dairy products
2) Coffee, roasted and extracts	7) Condiments & Sauces
3) Chocolate & Cocoa products	8) Pork and pork products
4) Eggs and products	9) Manufactured Tobacco
5) Meat products NESOI	10) Bakery Goods, Cereals, & Pasta

Food Industry by Channels (U.S. billion)

Retail Food Industry	$55.5 (2024)
Food Service – HRI	$26.6 (2024)
Food Processing	$88.0 (2025)
Food and Agriculture Exports	$62.4 (2024)

Top 10 Vietnamese Retailers

Aeon Mega Mart	Winmart
MM Mega Market	Circle K
Tops Market	7 Eleven
Co-op Mart	Bach Hoa Xanh
Lotte Mart	GS25

GDP/Population 2025

Population	102 million
GDP (current US$)	$514 billion
GDP per capita (current US$)	$5,026

Sources: Trade Data Monitor, LLC; General Statistics Office; Vietnam Customs, World Bank

Advantages	Challenges
U.S. products are perceived as safe and premium quality.	U.S. products are still more expensive than competitors partly due to higher tariffs and freight costs.
Growing market demand and increased focus on food safety	Most low and middle-income households in small cities and rural areas cannot afford imported products due to widening income inequality and a lack of modern retail establishments

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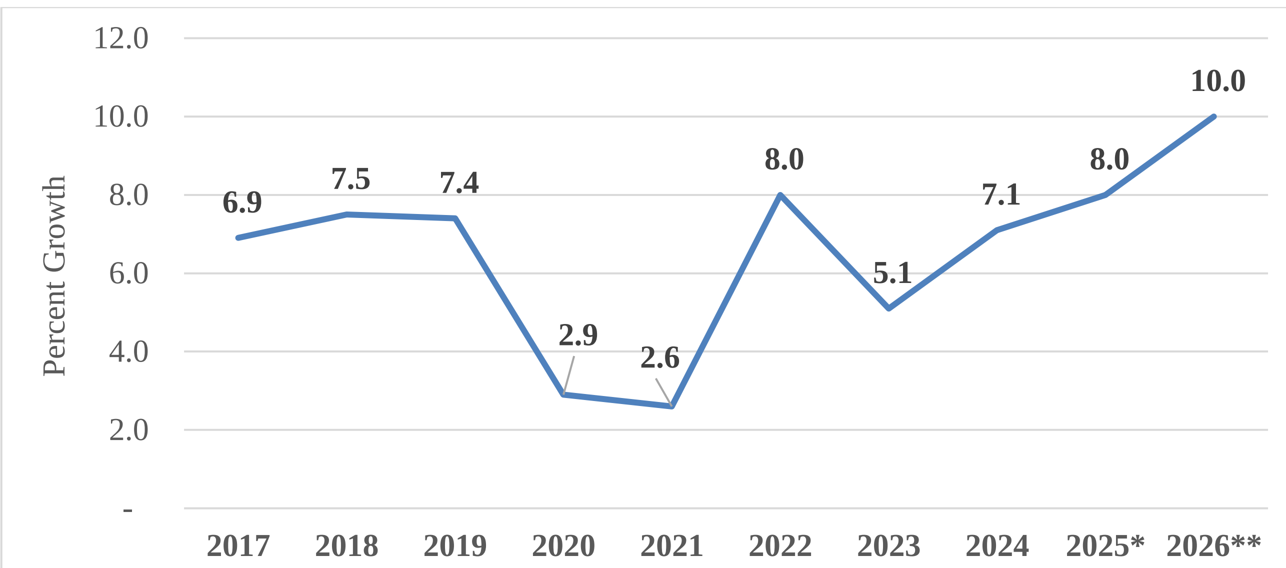
Section I: Market Overview

Vietnam's population reached nearly 102 million as of December 31, 2025, making it Southeast Asia's third most populous nation after Indonesia and the Philippines. The economy in 2025 remained vibrant with GDP growing 8.02 percent to approximately $514 billion. Key drivers included robust public investment ($35 billion, 98 percent of plan), record import-export performance ($930 billion, up 18.2 percent), strong foreign investment (4,045 new projects totaling $17.3 billion), rapid e-commerce expansion ($16.9 billion, up 34.7 percent), booming tourism recovery (21 million international arrivals, up 20 percent), and continued middle-class expansion (26 percent of the population by 2026). More on Vietnam's 2025 socio-economic situation is available HERE.

Despite these favorable conditions, several challenges emerged in 2025, including regulatory changes resulting from ministerial restructuring (see GAIN report VM2026-0010), rising bank interest rates, weak consumer purchasing power, and continued geopolitical tensions.

Figure 1: Vietnam's GDP Growth (annual percent)



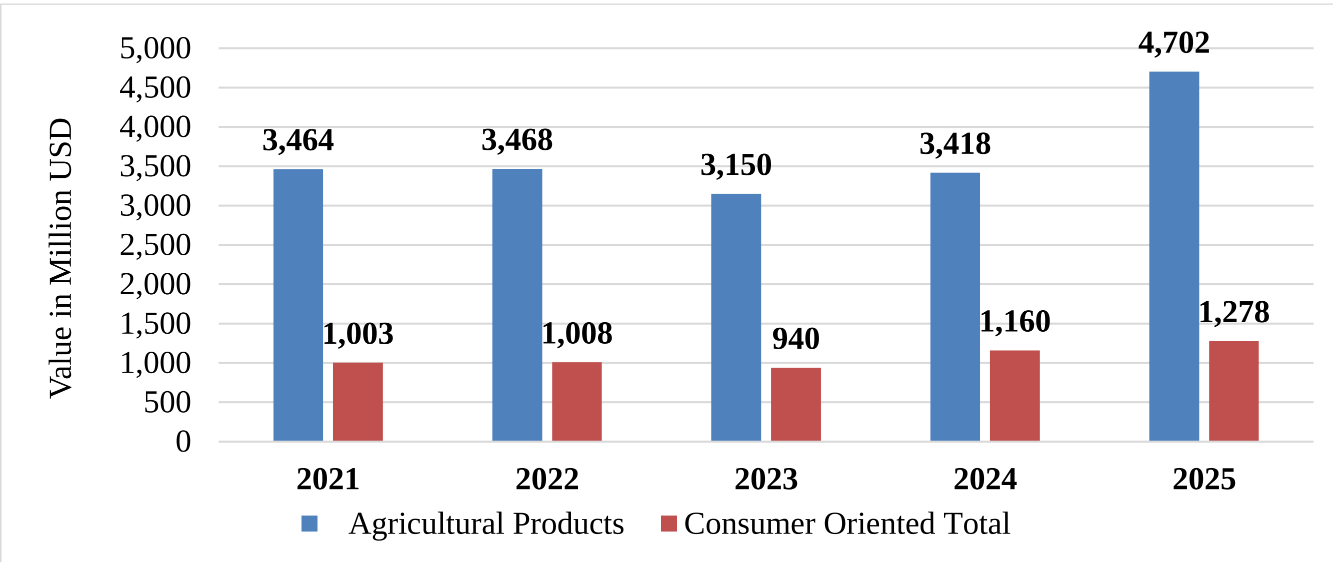
*Source: World Bank; GSO Vietnam, *Estimate; **Forecast*

Global exports of consumer-oriented products to Vietnam reached $16.7 billion in 2025, a 6.4 percent year-on-year increase driven by strong demand for tree nuts and dairy products. Vietnam imports a significant volume of tree nuts (cashew nuts account for 52 percent) for further processing and re-export. Excluding the tree nut category, global consumer-oriented exports to Vietnam in 2025 declined two percent year-on-year, reflecting reduced consumer discretionary spending amid concerns about rising utility costs, employment insecurity, and inflationary pressures.

The top five consumer-oriented suppliers were China, Cambodia, Côte d'Ivoire, the United States, and the European Union. Cambodia and Côte d'Ivoire emerged as the second and third largest exporters to Vietnam, due to rising demand for cashew nuts.

U.S. consumer-oriented exports to Vietnam reached a record high at $1.28 billion, increasing 10 percent over 2024 and accounting for 7.6 percent of total market share. Gains in tree nuts and dairy exports more than offset the declines in other consumer-oriented sales. Lower tariffs on shelled almonds and in-shell pistachios have greatly supported U.S. tree nut shipments to Vietnam, both for further processing for re-exports and for local consumption (more details in the FTA and Tariff section below). Dairy gains were driven by high demand for dairy ingredients. Meanwhile, many consumer-oriented categories declined due to tariff disadvantages relative to competitors from countries holding free trade agreements with Vietnam.

Figure 2: Share of U.S. Consumer-Oriented in Total U.S. Agricultural Exports to Vietnam



Source: U.S. Census Bureau Trade Data

Vietnam's National Assembly set an ambitious GDP growth target for 2026 of at least 10 percent. Major drivers and challenges are predominantly the same as those in 2025. However, major international institutions projected more modest expansion in the range of 6 - 7 percent due to concerns over slow global economic growth and trade disruptions, particularly among Vietnam's key trading partners.

Vietnam remains a competitive market. Table 1 below summarizes some of the advantages and challenges U.S. exporters face in the market.

Table 1: Advantages and Challenges

Advantages	Challenges
Demand for high-value consumer-oriented products continues to rise thanks to GDP growth and population growth.	Most low and middle-income households in small cities and rural areas cannot afford imported products due to widening income inequality and a lack of modern retail establishments.

Growth of the modern food retail, e-commerce, HRI, and food processing sectors continues to offer opportunities for imported food products, including those from the United States.	Wet markets and individual groceries remain the major retail channels for the majority of Vietnamese households, accounting for over 80 percent of total retail revenue.
Vietnam's continued global economic integration creates more openings for foreign products and better alignment with international standards.	Vietnam remains a price-sensitive market.
Local food processors continue to increase production capacity and improve product quality by using quality ingredients to meet both local and international market demand.	U.S. food ingredients face fierce competition from local and regional products.
Growth in convenience food stores, full-service restaurants, convention and wedding centers, and fast-food chains creates opportunities for quality food and food ingredients.	Already high rental costs continue to rise, pushing up retail prices and eroding consumer purchasing power amid Vietnam's economic slowdown.
Food safety concerns boost demand for imported food products, especially from developed countries.	Technical barriers to trade, sanitary and phytosanitary issues, and high tariffs limit imports of U.S. consumer-oriented products.
Vietnam has recently reduced most-favored nation tariff rates, which also apply to the United States.	High tariffs have made U.S. consumer-oriented products less competitive than those imported from ASEAN members and Vietnam's FTA partners.

Section II: Exporter Business Tips

Vietnam is a challenging market with fierce competition, complex regulations, high import tariffs, and a heavy bureaucracy. U.S. exporters should prepare carefully and have a clear strategy before entering the market. Please refer to the *Local Business Customs and General Consumer Tastes and Trends* attached in Appendix 2 for further details.

Section III: Import Food Standards, Regulations and Import Procedures

1) Customs Clearance

Vietnamese customs officers may require different certificates depending on the nature of imported products in question. U.S. exporters should reference the most recent Vietnam Food and Agricultural Import Regulations and Standards (FAIRS) report VM2025-0021 or contact Foreign Agricultural Service (FAS) Vietnam regarding any export document or regulatory concerns.

2) Documents Generally Required by the Country Authority for Imported Food

a) Meat, Poultry, and Aquatic Products

Exporters seeking to export chilled and frozen meat, poultry, and frozen seafood products to Vietnam must register their processing facilities with Vietnam's Ministry of Agriculture and Environment (MAE)/Department of Animal Health and Production (DAHP). Once DAHP approves a registration, they will list the establishment on their website https://cucthuy.gov.vn/, after which the company's registered products can be imported and circulated in the Vietnamese market.

For meat and poultry products registration, please use the *Updated Form 9 Decree 15 Instruction* and *Updated Form 9 Decree 15* in Appendix 3 and Appendix 4 and contact aghanoi@usda.gov or usda4circ25@gmail.com for further details.

For seafood other than live seafood, please refer to instructions on the National Oceanic and Atmospheric Administration (NOAA) website: https://www.fisheries.noaa.gov/export-requirements-country-and-jurisdiction-n-z#vietnam.

Special Notes

Vietnam's Ministry of Agriculture and Environment issued Circular No. 01/2026/TT-BNNMT on January 1, 2026, consolidating multiple prior regulations into a unified framework for quarantine inspection of terrestrial animals and animal products in domestic and international trade. The Circular introduces a more risk-based and streamlined inspection regime. However, strict testing requirements for *Salmonella* spp. and *E. coli* O157 remain in effect and continue to pose challenges for certain exporters. Please refer to the GAIN report VM2026-0001 for further details. Below are key notes for U.S. exporters' considerations:

- Export certificate(s) are strictly required. The export certificates are commonly known as health certificates (HCs) in Vietnam's meat and poultry industry.
- The HC number MUST MATCH the certificate number on the box labels. MAE's port quarantine officers will reject shipments with discrepancies.
- HCs for Vietnam MUST BE endorsed PRIOR to the shipping (bill of lading) date. Vietnam reserves the right to reject ALL animal product shipments where the HC is dated AFTER the shipment date of the product. Please refer to these links for further details: https://www.fsis.usda.gov/inspection/import-export/import-export-library/vietnam and https://www.aphis.usda.gov/animal-product-export/export-animal-products-vietnam
- Consolidated shipments that include products from unregistered facilities are subject to burdensome paperwork, heavy fines, and rejection/forced re-export.

- A discrepancy in product description between HCs and the import permit and systematic use of random importers as placeholders can lead to stringent inspections, resulting in burdensome paperwork, detainment, or rejection.
- Shipments that are diverted from other countries to Vietnam face a high risk of being rejected, although the container number and the seal number remain intact. Local Customs would require owners of rejected shipments to return them to ports of loading or ports of the original exporting country.

b) Live Aquatic Products

A health certificate is required. New-to-market live aquatic species NOT included in the *List of Live Aquatic Species Eligible for Trade in Vietnam* in Appendix IV of Circular 16/2026/BNNMT guiding the implementation of the Fish Law are subject to a "Risk Assessment Process". Please refer to the attached Appendix 5 "*Guidance for the Importation of Live Aquatic Species to Vietnam for Food Use*" for further details.

c) Fresh Produce

A phytosanitary certificate is required. Fresh produce is subject to plant quarantine while fresh fruits, fresh sweet potatoes and fresh potatoes are subject to a pest risk assessment (PRA), as regulated by Circular 14/2024/TT-BNNPTNT. Please refer to GAIN report VM2024-0003 for a list of HS codes subject to plant quarantine regulations for further details. Products listed in Section 9, except for some items which are in sealed packaging for retail, must be accompanied by a phytosanitary certificate.

To date, Vietnam has officially granted access for nine varieties of U.S. fresh produce: apples, cherries, grapes, pears, blueberries, oranges, grapefruit, peaches and nectarines, and U.S. fresh potatoes (not seed potatoes). For more details on varieties approved for import into Vietnam, please refer to the attached Appendix 6 "*List of Fresh Fruit Approved for Import to Vietnam.*"

d) Processed Foods and Beverages

Local importers are authorized to import and sell newly imported products immediately after they have posted the Product Self-Declaration documentation. Please refer to GAIN report VM2018-2859 for further details. U.S. exporters should work with their local importers by providing government-required certificate(s) and product samples.

Special Notes
Wine, beer, and spirits are subject to a special consumption tax (SCT) or excise tax.

On June 16, 2025, Vietnam's National Assembly passed the Law no. 66 on Excise Tax, introducing new rates on alcoholic beverages. The legislation took effect on January 1, 2026, with the first increase on January 1, 2027.

Under this Law, the current 65 percent ad valorem SCT rate for spirits with alcohol content of 20 percent or higher, as well as for all beer products (group 1), and 35 percent for wine with an alcohol content lower than 20 percent (group 2) will remain in place through the end of 2026.

Beginning in 2027, the rate will increase by 5 percent annually, reaching 90 percent for group 1 and 60 percent for group 2 by 2031.

e) Permissible Food Additives and Flavors

The Ministry of Health (MOH) changed some rules on food additives, flavors, and processing aids in Circular 17/2023. This Circular follows the list of food additives and how many of them can be used from the newest version of the General Standard for Food Additives CODEX STAN 192-1995. Vietnam also allows the use of flavors that have been evaluated by Joint FAO/WHO Expert Committee on Food Additives or recognized as Generally Recognized as Safe by Flavor and Extract Manufacturers Association or accepted by the EU. For more information, please see VM2023-0073.

3) Country Language Labeling Requirements

Labeling requirements for goods circulated in the Vietnamese market, including imported food, are stipulated by Decree 37/2026/ND-CP, which replaced Decree 43/2017.

Decree 37/2026 significantly updates Vietnam's goods labeling framework by introducing electronic labeling alongside traditional physical labels. Organizations are currently allowed to use QR codes, barcodes, and digital platforms to present labeling information, though medium and high-risk goods must retain physical labels for critical information (name, origin, responsible party, warnings). The Decree also introduces the "best before" concept, allowing products to remain marketable after optimal quality dates if safety is demonstrated.

Country of Origin abbreviations are now permitted at customs clearance, and supplementary labels may be electronic. These changes balance digital transformation with consumer protection, establishing risk-based requirements while reducing compliance costs for businesses. Please refer to GAIN report VM2026-0017 for further details.

Circular 29/2023, providing guidelines for nutritional labeling for pre-packaged foods, remains effective.

4) Tariffs and FTAs

As of June 2025, U.S. exporters continue to face tariff disadvantages in Vietnam, which reduce the competitiveness of U.S. products against those from countries that have Free Trade Agreements (FTAs) with Vietnam.

Vietnam has signed significant FTAs with over 50 nations, including individual-based agreements as well as those signed via economic blocs, such as the European Union-Vietnam FTA (EVFTA), the

Regional Comprehensive Economic Partnership (RCEP) whose members are ASEAN, Australia, China, Japan, New Zealand, and South Korea, and Vietnam-UK FTA (UKVFTA).

As a member of ASEAN, Vietnam is party to ASEAN-China, ASEAN-Korea, ASEAN-Japan, ASEAN-New Zealand-Australia, ASEAN-India, ASEAN-Hong Kong (AHKFTA), and RCEP. Individually, Vietnam has signed the Vietnam-Japan FTA, Vietnam-Korea FTA, Vietnam-Chile FTA, the Vietnam-Eurasian Economic Union (EAEU), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), EVFTA, UKVFTA, and recently the Vietnam-Israel FTA. Other FTAs that are under negotiation include the Vietnam-EFTA (Switzerland, Norway, Iceland, and Liechtenstein), and the Vietnam-UAE FTA.

Through these FTAs, Vietnam aims to boost exports and attract more foreign direct investment. In exchange, Vietnam has committed to lowering import tariffs, eliminating quotas, increasing market access for goods and services, strengthening protections for intellectual property rights, enhancing legislative and regulatory transparency, and improving commercial dispute settlement and trade facilitation processes. Tariffs on products imported into Vietnam can be found on the Vietnam Customs website.

Special notes:
On March 31, 2025, the Government of Vietnam issued Decree 73/2025, further reducing the most-favored nation import tariff rates on ethanol, frozen chicken drumsticks, in-shell pistachios, almonds, fresh apples, cherries, and raisins. Please refer to GAIN report VM2025-0014 for more details.

Section IV: Market Sector Structure and Trends

1) Distribution Channels

Please see an outline of *Distribution Channels for imported U.S. products in Vietnam market* (Appendix 7).

2) Market Trends

Changes in Vietnam's tax regime are reshaping the retail and food service sector. As mentioned in the Exporter Guide 2025, Resolution no. 198/2025/QH15 was passed by the Vietnam National Assembly, introducing multiple policies to facilitate private sector development through tax reform, food safety, and counterfeit goods control. The objective is to foster a healthier business environment, support sustainable development, and protect consumers’ interests.

As further steps to implement Resolution 198's tax reforms, the National Assembly passed Law no. 108/2025 on Tax Administration, Law no. 109/2025 on Personal Income Tax, and Law no. 149/2025 Amending and Supplementing the Law on Value-Added Tax, providing detailed guidance for implementation.

Traditional retail channels (wet markets and household groceries) as well as small restaurants are struggling to comply with Resolution 198 and reformed tax regulations due to inadequate inventory management, transaction tracking, quality control and traceability.

In contrast, modern retail channels and restaurant chains view these reforms as creating a more level playing field. With advanced management systems already meeting tax reform requirements and stricter food safety standards, modern retail channels and restaurant chains could increase sales of registered products, including imported food and beverages. Please refer to GAIN reports VM2025-0034 and VM2025-0052 for more information on Vietnam's food retail and food service.

Section V: Agricultural and Food Imports

Vietnam's top five consumer-oriented imports in 2025 include tree nuts, fresh fruits, dairy, beef products and soups & other food preparation. While tree nuts, mostly cashew nuts, almonds, pistachios and walnuts, are imported for further processing and re-exports; the others are mostly for domestic consumption (see Table 2).

Table 2: Top Ten Consumer-Oriented Agricultural Products imported to Vietnam (million U.S. dollars)

No.	Product description	Year				
		2021	2022	2023	2024	2025
1	Tree Nuts	2,010	1,628	2,247	2,805	4,037
2	Fresh Fruit	2,134	1,748	1,702	1,905	1,591
3	Dairy Products	1,344	1,301	1,191	1,229	1,465
4	Beef & Beef Products	853	832	1,330	1,407	1,439
5	Soup & Other Food Preparation	966	1,193	1,099	1,117	1,106
6	Processed Vegetables	833	867	972	1,056	1,058
7	Fresh Vegetables	1,158	1,118	1,186	1,192	885
8	Non-Alcoholic Bev. (ex. Juices, Coffee, Tea)	767	886	825	883	873
9	Manufactured Tobacco	743	366	569	677	739
10	Bakery Goods, Cereals, & Pasta	345	418	387	426	458

Source: Trade Data Monitor LLC

Vietnam's top five fastest-growing consumer-oriented imports to Vietnam by value over the past five years include Roasted or Extract Coffee, Meat Products not Elsewhere Specified or Indicated (NESOI), Tree Nuts, Fruit and Vegetable Juices, and Beef & Beef Products. Tree nuts and beef have greatly contributed to Vietnam's total consumer-oriented import value, while the remaining three remain comparatively minor (see Table 3).

Table 3: Top Ten Fastest-Growing Consumer-Oriented Agricultural Products Imported to Vietnam (million U.S. dollars)

No.	Product description	Year					CAGR*
		2021	2022	2023	2024	2025	
1	Coffee, Roasted and Extracts	51	72	49	105	140	22%
2	Meat Products NESOI	111	127	146	198	241	17%
3	Tree Nuts	2,010	1,628	2,247	2,805	4,037	15%
4	Fruit & Vegetable Juices	16	26	28	33	32	15%
5	Beef & Beef Products	853	832	1,330	1,407	1,439	11%
6	Dog & Cat Food	38	51	54	64	64	11%
7	Condiments & Sauces	99	149	182	136	159	10%
8	Chocolate & Cocoa Products	143	126	123	171	225	9%
9	Poultry Meat & Prods. (ex. Eggs)	246	320	339	425	379	9%
10	Processed Fruit	148	191	193	233	224	9%

Source: Trade Data Monitor LLC
** Compound Annual Growth Rate*

U.S. agricultural exports to Vietnam in 2025 expanded 10 percent year-on-year, reaching nearly $1.3 billion. Please refer to the attached Appendix 1 for more details.

Best High-value, Consumer-Oriented Product Prospects:

Beef, pistachios, almonds, apples, poultry, milk and cream (concentrated or containing added sweetening), food preparation NESOI, fresh and frozen potatoes, and confectionery.

Section VI: Key Contacts and Further Information

1) **State Regional Trade Groups**
   http://www.fas.usda.gov/programs/market-access-program-map/state-regional-trade-groups.

2) **USDA Cooperators**
   USDA Cooperators, which represent specific U.S. agricultural commodities, can facilitate market penetration and expansion for U.S. exporters with their resources. Contact information is available in the attached Appendix 8.

3) **American Chamber of Commerce in Vietnam**
   The American Chambers of Commerce in Vietnam (AMCHAM) serves as the point of contact for members of the American business community. AmCham Hanoi and AmCham Ho Chi Minh City have various committees that members can join to focus on issues concerning food, agriculture, and agribusiness.

   AmCham Hanoi: http://www.amchamhanoi.com

AmCham Ho Chi Minh City: www.amchamvietnam.com

4) **Key Government Contacts**

MAE/Plant Production and Protection Department (PPPD) www.ppd.gov.vn

MAE/Department of Animal Health and Production (DAHP) www.cucthuy.gov.vn

MAE/Department of Fisheries and Surveillance (DFiS) https://tongcucthuysan.gov.vn/vi-vn/

Vietnam Food Administration (VFA) www.vfa.gov.vn

Ministry of Industry and Trade www.moit.gov.vn

Agricultural Affairs Offices	
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http://www.fas.usda.gov	

Attachments: Appendix 1 - U.S. Consumer-Oriented Exports to Vietnam.pdf

Appendix 2 - Local Business Customs, and General Consumers Tastes and Trends.pdf

Appendix 3 - Updated Form 9 Decree 15 (2023-12).pdf

Appendix 4 - Updated Form 9 Decree 15 Instruction (Dec 2023).pdf

Appendix 5 - Guidance for the Importation of Live Aquatic Species to Vietnam for Food Use 2026.pdf

Appendix 6 - List of fresh fruits approved for import to Vietnam.pdf

Appendix 7 - Distribution Channels of Imported U.S. Products in Vietnam.pdf

Appendix 8 - USDA Cooperators in Vietnam.pdf