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Report Highlights:

Vietnam's livestock sector is facing many challenges, including the impacts of various disease outbreaks, the COVID-19 pandemic, and high feed costs. This has resulted in weak prices and squeezed margins for the domestic meat and poultry industries. Demand for livestock products has sharply fallen compared to the pre-COVID-19 period mainly due to consumers' loss of income and closures of schools and the food service sector. Meanwhile, animal disease outbreaks, particularly the African Swine Fever (ASF) epidemic, are at risk of again spreading on a large scale. ASF outbreaks were ongoing in 48 out of 63 provinces in Vietnam, resulting in the death and culling of nearly 280,000 pigs with a total weight of about 11,678 metric tons (MT), about 3.6 times higher than the culled numbers in the same period of 2020.

Background

Vietnam's livestock sector is facing challenges including animal disease outbreaks and rising input prices. The ongoing COVID-19 pandemic has caused disruptions to the global and local supply chains, affecting production, consumption, and trade of agricultural products in Vietnam. High commodity prices, high freight rates, and disruptions to the supply of feed ingredients and other agricultural inputs have led to an increase in the prices of finished feed products. According to the Ministry of Agriculture and Rural Development (MARD), about 90 percent of feed ingredients in Vietnam are imported. Feed costs account for 65-70 percent of the total livestock production cost in Vietnam. MARD's October livestock report showed that the average price of animal feed spiked by 16-36 percent compared to the same period in 2020 and the prices of feed grains saw the strongest increase, while the prices of livestock products remained low.

The Government of Vietnam (GVN) has taken multiple measures to contain the spread of COVID-19, including the closure of borders (and tourist industry), social distancing orders; the closures of schools, foodservice enterprises, and wholesale and wet markets; and the scaling down or shutdown of industrial parks and export processing zones. The costs of production and distribution have significantly increased, up 60 percent from the pre-COVID-19 levels. Rising distribution costs have caused retail prices to increase, contributing to a decrease in demand. According to MARD, these measures have led to a marked decline in demand for meat by 30-50 percent, especially in the two major cities of Hanoi and Ho Chi Minh City (HCMC). A September 2021 [report by the United Nations](#) showed that in July 2021, 88 percent of the surveyed households in Vietnam suffered from employment impacts; 63.5 percent of all these households and 66.9 percent of affected households experienced an income drop of 30 percent or more from the pre-pandemic levels (December 2019). As a result, 71 percent of affected households cut their food spending and 51.2 percent of households cut the amount of food served per meal. The social distancing policy put in place in southern Vietnam since mid-July has curbed the flow of goods and people, leading to disruptions in the agricultural supply chain. Livestock producers are facing difficulties in accessing new bank loans and lack the financial resources to maintain production due to the backlog of unsold stocks.

Slaughtering and processing facilities are subject to stricter COVID-19 controls, causing bottlenecks in production and business activities. The number of slaughtered pigs and poultry fell by 27.7 percent and 49.8 percent respectively in October 2021 compared to the pre-COVID levels. In HCMC and the southern provinces, the number of pigs put into slaughter decreased from 4,000-7,000 heads per day to 2,800-4,000 heads per day.

Meanwhile, the Vietnam livestock industry is currently going through a period of restructuring. Vietnam is working towards the goal set forth in its Livestock Sector Development Strategy for 2021-2030 that carcass meat production will reach 5 to 5.5 million MT by 2025 and 6 to 6.5 million MT by 2030, of

which pork will account for up to 65 percent by 2025 (about 60 percent by 2030), poultry meat will account for 26 to 28 percent by 2025 (about 30 percent by 2030), and beef will account for up to 10 percent by 2025 (11 percent by 2030). Vietnam looks to export 15 to 20 percent of its pork production and 20 to 25 percent of its poultry meat and eggs. Factors like the entry into force of the FTAs that Vietnam has signed, the ongoing COVID-19 pandemic, and other emerging animal disease outbreaks, have also driven the restructuring process. Vietnam hopes to have an advanced livestock industry by 2030.

African Swine Fever (ASF): Status Update

There has been an increase in ASF outbreaks in Vietnam since August 2021. According to MARD, the ASF outbreaks were most serious in September and October 2021. MARD statistics show that the number of pigs killed and culled in July 2021 was 8,472 and rose to about 29,000 in October 2021. Local media quoted Deputy Director General (DDG) of MARD's Department of Animal Health Mr. Nguyễn Văn Long as saying at that time, that although there have recently been ASF outbreaks in many localities, the epidemic was still under control nation-wide, and that 99 percent of Vietnam's swine population has not been affected by ASF. These outbreaks were limited to small-scale pig farming operations, which did not implement proper biosecurity measures.

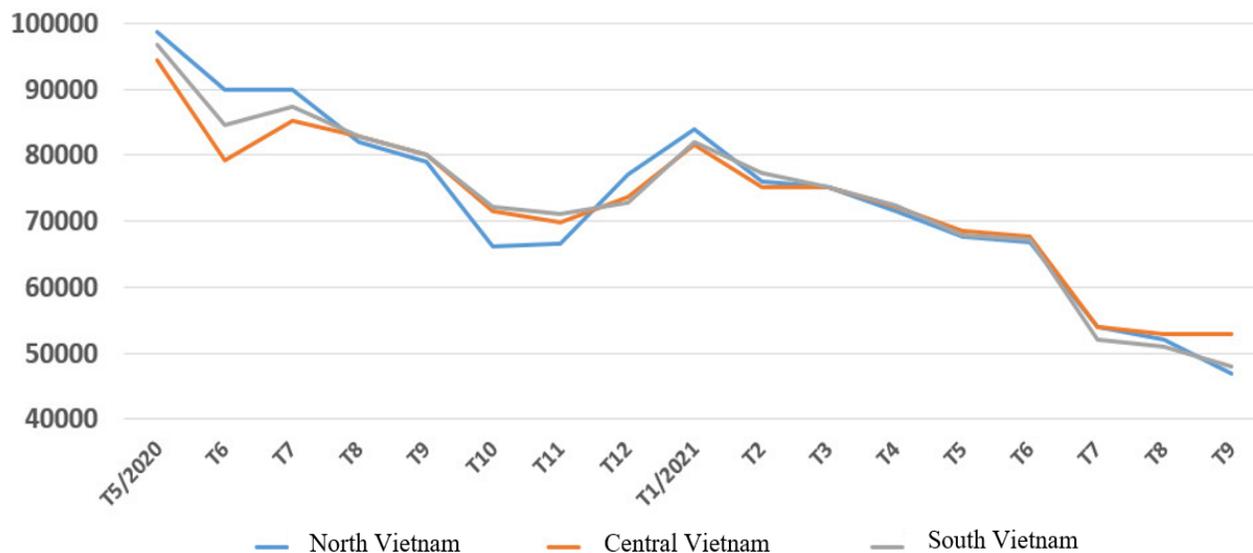
On November 25, 2021, the GVN stated that the ASF outbreak is evolving in a complicated manner and the ASF epidemic is at risk of spreading on a large scale, affecting not only on Vietnam's livestock industry but also the food supply and overall demand. MARD's statistics showed that year-to-date through December 15, ASF outbreaks continued to be reported in many provinces and were still active in 48 out of 63 cities and provinces in Vietnam, resulting in the death and culling of nearly 280,000 pigs with a total weight of about 11,678 MT, about 3.6 times higher than the culled numbers in the same period last year. Given the current ASF situation, MARD considers an ASF vaccine as the best solution to control the spread of ASF. Vietnam has been working to develop an ASF vaccine. DDG Long expects the Vietnam ASF vaccine approval process could be completed in the first quarter of 2022 and Vietnam could then commence commercial production of ASF vaccines. Local media reported that recent vaccine trials by one of the local major livestock players Dabaco, proved to be safe and efficient, yet more trials need to be completed before getting the final approval for commercialization.

In response to the growing risk to the swine industry posed by the ASF outbreaks, MARD's Department of Livestock Production (DLP) issued Decision No. 205 on November 11, 2021, with guidelines for small and medium swine farms and households on the biosecurity farming process to prevent ASF. On November 25, 2021, Deputy Prime Minister (DPM) Lê Văn Thành signed Directive No. 32, directing leaders of Ministries and provincial governments to focus on implementing solutions to effectively control the ASF epidemic, and to ensure a stable pork supply and prices during the lead up to Lunar New Year. Arrivals from ASF-affected countries into Vietnam will be strictly controlled at border gates. He also urged government agencies to actively coordinate with international organizations and foreign governments to support Vietnam in the ASF prevention. According to local media reports, on December

9, 2021, MARD and the International Finance Corporation (IFC) signed a memorandum of understanding on technical support for the prevention and control of ASF in Vietnam. Accordingly, IFC will help Vietnam improve its capacity in developing legal and institutional framework regarding the implementation of biosecurity measures and diseases control in pig farming.

Swine Prices

Figure 1: Vietnam Live-weight Hog Prices May 2020 – September 2021 (Unit: VND)



(Source: MARD)¹

According to MARD, in 2020 and in the first three months of 2021, hog prices were very high, ranging from VND 75,000 to VND 95,000 per kg (see Figure 1). Farm-gate hog prices showed a steady downward trend from April 2021 dropping below VND 70,000 per kg. In the first half of October 2021, the average price hovered around VND 32,000-46,000 per kg, hitting the lowest level in two years. The hog prices then rose to around VND 52,000 per kg. Although the live hog prices have dropped sharply, the retail prices of pork sold at traditional markets and supermarkets in Hanoi and HCMC remain high, averaging around VND 110-200,000 per kg depending on the different types of pork meat.

According to industry experts, the pork surplus previously seen in 2017 has reoccurred this year in Vietnam. One of the reasons for the recent oversupply of hogs was that MARD encouraged farmers and livestock companies to restock and expand their herds. Hog prices have continuously declined to below cost prices (down 50 percent from early 2021). Many livestock traders believed imported pork meat was also responsible for the price dive. MARD explained at an October 30 virtual forum on information and trade connections in the livestock sector, that the current oversupply of hogs was partly attributable to the 18 month pork production cycle. MARD publicly confirmed that imported pork accounts for only

¹ “T” in the chart refers to “Month”

3.6 percent of the total domestic pork supply and the claim that imported pork caused the pork prices to decrease is unfounded. DLP DDG Nguyễn Văn Trọng forecast that hog prices would rebound to VND 60,000-70,000 per kg but not to the May 2020 record level of VND 100,000. He also noted that COVID-19 could impact his forecast.

Government's Response to Falling Swine Prices

In early October 2021, the Vietnamese Livestock Association wrote to the Prime Minister to request support for the livestock sector. The GVN agreed to support the livestock industry and held online conferences to discuss solutions to stabilize production, processing, and consumption of livestock products, and to facilitate trade connections in this sector.

On October 22, 2021, Vietnam's DPM Lê Văn Thành chaired a meeting to assess the pork production and discuss solutions to stabilize the market. DPM Thành asked MARD and the Ministry of Industry and Trade (MOIT) to monitor the flow of goods to reduce the production cost and intermediary costs, especially for pork products, and boost the export of livestock products. He asked MARD, MOF, and provincial governments to strengthen the management of the prices of input products, especially animal feed and veterinary medicine, and to develop plans for herd repopulation and expansion in the lead up to Lunar New Year. DPM Thành asked MOIT to analyze the costs of the value chain; support the promotion of agricultural products one-commerce channels; strengthen market management, market inspection and supervision to curb speculative profiteering; coordinate with localities and relevant ministries/agencies to develop plans and implement price stabilization activities for livestock products.

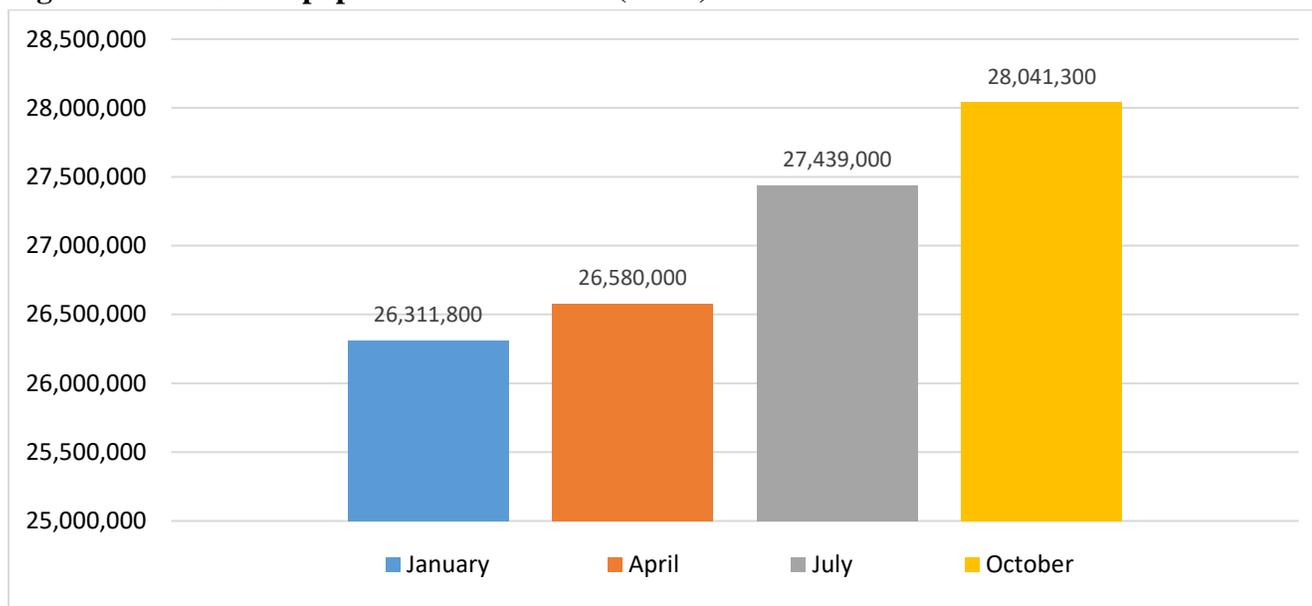
Following a meeting of the Price Steering Committee chaired by DPM Lê Minh Khái on November 1, 2021, MARD was assigned to coordinate with MOIT and provincial governments to closely monitor market developments to avoid sudden price fluctuations and supply chain disruptions. The GVN stressed the inflationary pressure for 2022 and highlighted the need for cautious and flexible price management in the remaining months of 2021 and 2022.

Production

Unfavorable conditions including the volatility in hog prices and animal feed, ongoing ASF outbreaks, and the COVID-19 pandemic, have discouraged smallholder swine farmers from restocking or expanding their herds, while large livestock farms still have plans to increase their swine numbers.

According to MARD's October 2021 livestock report, there were 1.5 million unsold overweight hogs, accounting for about 30 percent of the total number of market weight hogs. The normal average weight of a market-ready hog is 100-105 kg, and the current weight of an unsold hog is 125-130 kg.

Figure 2: 2021 Swine population in Vietnam (Head)



(Source: MARD)

According to MARD’s October livestock report, Vietnam’s pig population is over 28 million head (see Figure 2) and the live-weight swine production reached about 2.9 million MT in the first nine months of 2021. The 16 largest livestock enterprises have over 6 million pigs, accounting for about 23 percent of Vietnam’s total pig herd.

In its 2021-2030 Livestock Development Strategy, MARD envisions Vietnam’s swine herd at 29-30 million head, including 2.5-2.8 million sows. According to MARD’s October livestock report, the 2022 growth rate target for pork production at 4.5 percent, to reach 3.97 million MT of live-weight pork output.

According to the [OECD-FAO Agricultural Outlook 2021-2030](#), pork production in Vietnam is forecast to increase in 2021 and reach the 2017 productions levels by 2023.

Consumption Trends and Purchasing Channels

The ASF epidemic and the COVID-19 pandemic have created an opportunity for imported pork and changed the Vietnamese consumption habits. Anecdotally, consumers used to be picky about imported frozen meat, but are now choosing to buy frozen meat because of the convenience and competitive pricing, particularly during the COVID-19 social distancing periods.

A recent survey conducted by Kantar, a data and consulting company, revealed that packaged food is the fastest growing item at the moment, and Vietnamese consumers are now more health conscious and are consuming more immune-boosting and traceable food products. Disease outbreaks resulted in higher

demand for safe and certified meat. “Safe”, “Clean”, “Organic” are key words that have been used by livestock companies to promote their products.

In the pre-COVID-19 period, the majority of frozen imported pork went to food processing outlets and canteens, hotels, and restaurants, but was not widely available in supermarkets. Since the emergence of COVID-19, more imported pork goes to the retail sector. As such, local consumers are getting accustomed to frozen pork. Trade contacts shared that the number of people who buy meat through supermarkets, convenience stores, and home delivery services has sharply increased. Contacts also shared that frozen imported pork, particularly from Russia and the European Union, has sold well due to competitive prices, especially during the COVID-19 lockdowns in HCMC from July-September 2021. Chilled pork meat locally produced under brands including MEATDeli, C.P., and G-Kitchen is also gaining popularity.



(Source: [Vietnam Moi](#))

Modern retailers and processors are using QR codes for traceability, providing consumers with assurances on the safety and origin of their products.

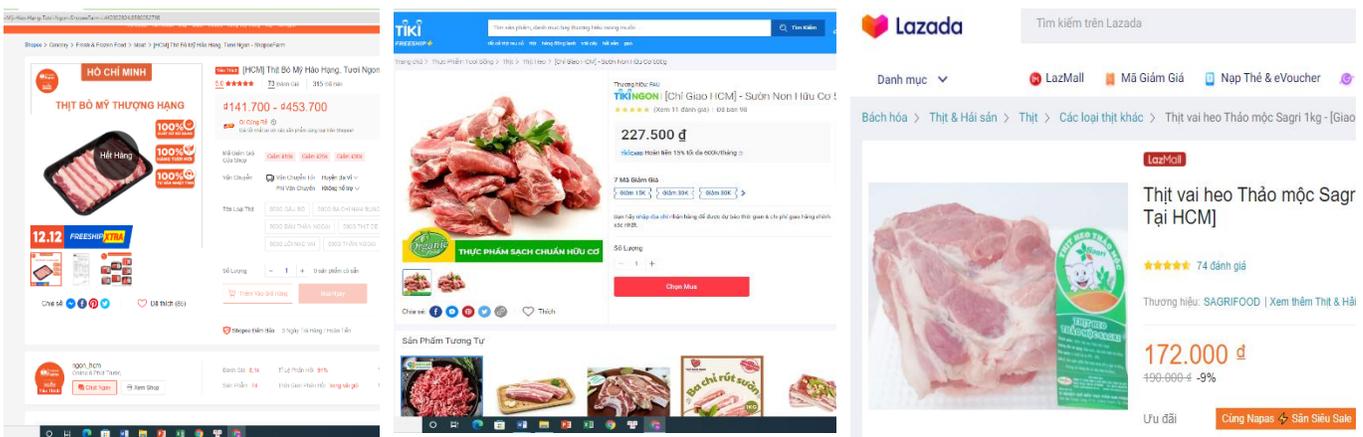


(Source: <https://www.bachhoaxanh.com/>)



In terms of purchasing channels, Vietnamese consumers can now easily buy meat and get good deals on e-commerce platforms such as Shopee, Tiki, or Lazada. Due to COVID-19 related restrictions, these e-commerce platforms have added frozen products to their product ranges. Foodservice operators have also collaborated with delivery services such as Grabfood to supply food to consumers.

To meet the growing demand for premium meat products from affluent customers seeking convenience and quality and to compete with customized frozen cuts from imported pork, domestic producers are providing diversified ready-to-cook and ready-to-eat options. Trade contacts shared that U.S. meat suppliers were less willing than other suppliers to customize cuts for the Vietnamese market.



(Source: Shopee, Tiki, Lazada)

In addition to cooperating with traditional markets, supermarkets, convenience stores, and e-commerce platforms to distribute products, many vertically integrated livestock companies have also set up standalone meat stores/meat retail outlets to reach out directly to consumers



(Source: <https://porkshop.vn/pages/he-thong-cua-hang#3>; <https://kenhthoisu.net/luu-tru/4230>)

In October 2020, the Vietnamese conglomerate Vingroup launched a mobile app called VinSHOP – the first in Vietnam to employ the Business to Business to Consumer (B2B2C) model in the retail market - looking to improve the supply chain of small businesses. This app provides not only a direct supply link from manufacturers/suppliers to mom-and-pop shops (grocery stores) but also connects traditional mom-and-pop type retail businesses to consumers through VinID Pay e-wallet. The app has also added fresh and frozen meat to their product ranges.



(Source: VinShop app, vnexpress.net)

Trade

Figure 3: Vietnam Pork Imports, 2018- August 2021

| | 2018 | 2019 | 2020 | Jan-Aug 2021 |
|--|-------|-------|-------|--------------|
| Imported pork (Thousand metric tons - TMT) | 33 | 63 | 225.5 | 112.7 |
| Imported meat (including pork meat, bovine meat, and poultry meat) (TMT) | 259 | 270 | 599.5 | 214.4 |
| Imported pork's share of total meat imports (percent) | 12.7 | 23.3 | 37.6 | 52.6 |
| Vietnam's pork production (TMT) – GSO figures | 3,871 | 3,329 | 3,475 | 3,061 |
| Imported pork's share of locally produced pork (percent) | 0.8 | 1.9 | 6.4 | 3.6 |

(Source: MARD's calculation based on GSO's pork production figures)

Vietnam is party to 15 bilateral and regional free trade agreements (FTAs), including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which entered into force in January 2019 and the Regional Comprehensive Economic Partnership (RCEP), which will enter into force in January 2022. ASEAN-led agreements, including FTAs with China, Hong Kong, Japan, the Republic of Korea, India, Australia-New Zealand, and the ASEAN Free Trade Agreement. Vietnam also has bilateral FTAs with the European Union (EVFTA), Japan, the Republic of Korea, Chile, the United Kingdom, and the Eurasian Economic Union (EAEU). Bilateral FTAs with the European Free Trade Association (EFTA) and Israel are under negotiation.

The EU is the current largest exporter of pork and pork products to Vietnam, followed by Russia. Russia, though not one of the top global pork exporters, has increased their market share with their zero tariff rate, that began in 2020 under the Vietnam-EAEU FTA. Russia is currently the only country that can export salted casings to Vietnam. Post's [GAIN VM2020-0032](#) noted that on March 19, 2020, MARD leaders directly connected one of Vietnam's largest private sector firms with Russia's biggest meat producer to discuss imports of Russian pork. At that time, MARD Vice Minister Tiến stated that the importation of pork was seen as a solution to ease pressure on the domestic supply and to reduce the pork price.

Despite the fact that the United States was the world's second largest pork exporter in 2020, tariff differentials, in addition to higher unit cost over the past year, have prevented U.S. pork from competing on a level playing field in Vietnam. U.S. pork exports to Vietnam increased in 2020, as Vietnam temporarily reduced its Most Favored Nation (MFN) tariff rates from 15 percent to ten

percent for frozen pork. This tariff reduction expired at the end of 2020. U.S. exports of pork and pork products to Vietnam were valued at \$54.1 million in 2020. On November 15, 2021, the GVN issued Decree 101/2021/ND-CP, revising MFN tariff rates on select agricultural products including pork ([GAIN VM2021-0097](#)). This Decree follows the commitment made by the GVN to Vice President Harris during her visit to Hanoi, in August 2021. The Decree will lower the MFN duty on frozen pork from 15 percent to ten percent beginning on July 1, 2022. This reduction is expected to allow U.S. pork producers greater access to the Vietnamese market. However, the lack of an FTA with Vietnam has still put the United States at a competitive disadvantage vis-à-vis its competitors benefiting from the lower FTA rates (see Figure 4 below).

Figure 4: Tariff Table by FTA Rates in 2022

| | MFN (percent) | CPTPP (percent) | EVFTA (percent) | VNEAEU (percent) | AANZFTA (percent) |
|---|---|--------------------------------|----------------------------|-----------------------------|------------------------------|
| Fresh, chilled pork (HS codes 02031100, 02031200) | 25 | 16.2 (Mexico) 13.5 (Others) | 17.5 | 0 | 0 |
| Other (HS code 02031900) | 22 | 16.2 (Mexico) 13.5 (Others) | 17.5 | 0 | 0 |
| Frozen pork (HS codes 02032100, 02032200, 02032900) | 15 (10 percent beginning July 1, 2022) | 7.5 (Mexico) 5.6 (Others) | 9.3 | 0 | 0 |
| Fresh, chilled or frozen edible pork offal (HS codes 02064100, 02064900, 02063000) | 8 | 2 (Mexico) 0 (Others) | 5.6 | 0 | 0 |

(Source: Compiled by Post)

According to AgroMonitor, from January - November 2021, Vietnam's pork imports (HS 0203) reached about 153,110 MT, up about 21.6 percent from the same period last year and edible offal imports (HS 0206) were up 35 percent, reaching about 117,000 MT.

Vietnam's pork imports were very strong through June but have been decreasing since July 2021. Given recent market developments, Post forecasts imports to decline further at the end of 2021 and into 2022, on continued recovery in domestic pork supplies.

According to MARD's Agrottrade October forecast, the volume of frozen pork imports will continue to increase because major pork exporters including the EU and Brazil have a surplus of pork production, and the world's biggest pork importer China, has reduced their pork imports. Industry contacts shared

that due to China's reduced imports, cheaper pork products from the EU and Russia have been flooding the Vietnamese market, leading to the current high stocks held by traders.

Figure 5: Top 10 suppliers of Pork and Edible Pork Offals to Vietnam, January to November 2020-2021 (MT)

| No | Country | January-November 2020 | January-November 2021 | 2021/2020 (%) |
|----|---------------|-----------------------|-----------------------|---------------|
| 1 | Russia | 38,331.0 | 82,829.2 | ▲116.1% |
| 2 | Germany | 8,988.0 | 38,659.0 | ▲330.1% |
| 3 | Brazil | 33,535.1 | 30,163.1 | ▼10.1% |
| 4 | Poland | 27,012.0 | 26,865.0 | ▼0.5% |
| 5 | Netherlands | 21,406.7 | 24,405.2 | ▲14.0% |
| 6 | Canada | 23,504.3 | 19,216.2 | ▼18.2% |
| 7 | Denmark | 2,894.0 | 8,137.9 | ▲181.2% |
| 8 | Spain | 10,677.2 | 6,739.3 | ▼36.9% |
| 9 | United States | 23,076.2 | 6,653.6 | ▼71.2% |
| 10 | Italy | 4,579.2 | 5,073.3 | ▲10.8% |

(Source: AgroMonitor)

MARD's October Livestock report showed that in the first nine months of 2021, Vietnam exported 2,342 MT of pork and pork products, an increase 23.8 percent from the same period in 2020. Mostly this is frozen pork exported to Hong Kong.

Bovine Cattle

Lumpy Skin Disease (LSD)

LSD outbreaks are being controlled but the risk of recurrence remains high. According to MARD, LSD outbreaks were reported in 55 cities and provinces in 2021, causing LSD in 206,953 cattle and killing 29,047 head of cattle. As of December 15, 2021, LSD outbreaks were still active in 11 provinces. The number of culled bovine cattle hit its peak at more than 6,000 head in March 2021, and was down to only 71 head in October, thanks to the use of imported LSD vaccines. Given the increasing severity of the LSD outbreaks, the GVN recently issued a National Plan on the Prevention and Control of the LSD

in bovine cattle for the 2022-2030 period, under Prime Minister's Decision No.1814 dated October 28, 2021.

Production

Cattle farming is generally stable. According to MARD October statistics, the buffalo population was about 2.34 million head, down 3.8 percent from the same period in 2020. Live-weight buffalo meat production in the first nine months of 2021 is estimated at 91.4 TMT.

The beef/dairy herd size was nearly 6.3 million head, up 1.8 percent from the same period in 2020. Dairy cows constitute over 331,000 head in the herd. Live-weight beef production in the first nine months of 2021 is estimated at 335.5 TMT.

Trade

According to the Vietnam Livestock Association, local production of bovine meat in Vietnam can only meet less than 70 percent of domestic demand. Vietnam imports a lot of buffalo meat from India (the import tariff for Indian buffalo meat will be eliminated in 2022 under the ASEAN-India FTA) and beef from other countries. Vietnam is also importing live beef cattle for fattening and slaughter. AgroMonitor statistics show that Vietnam imported 380,840 live cattle for slaughter in the first eleven months of 2021, down 30 percent from the same period last year, with imports mainly from Australia and Thailand. The first shipment of 14,000 bulls from Brazil arrived in Vietnam in September 2021 for slaughter. Brazilian live cattle exports to Vietnam are currently subject to a five percent MFN tariff rate, whereas Australian live cattle enjoy a zero tariff rate under the AANZFTA.

According to AgroMonitor, from January-November 2021, Vietnam's bovine meat and edible offal imports reached 144,705 MT, up 27 percent from the same period last year.

Poultry

Avian Influenza (AI)

MARD statistics show that year-to-date through December 15, 2021, AI outbreaks were reported in 32 cities and provinces in Vietnam, leading to the death and culling of 444,298 birds (nearly twice the number during the same period of 2020). This represents about 0.08 percent of the total poultry flock. According to MARD, as of December 15, AI outbreaks were ongoing in six provinces.

Poultry Prices

The price of colored feathered broilers remained stable during the first nine months of 2021, averaging about VND 50,000 to 55,000 per kg in the north and a bit higher in central and southern Vietnam. The white feathered broiler prices ranged from VND 23,000 to 33,000 per kg. Duck meat prices were around VND 40,000 per kg.

Production

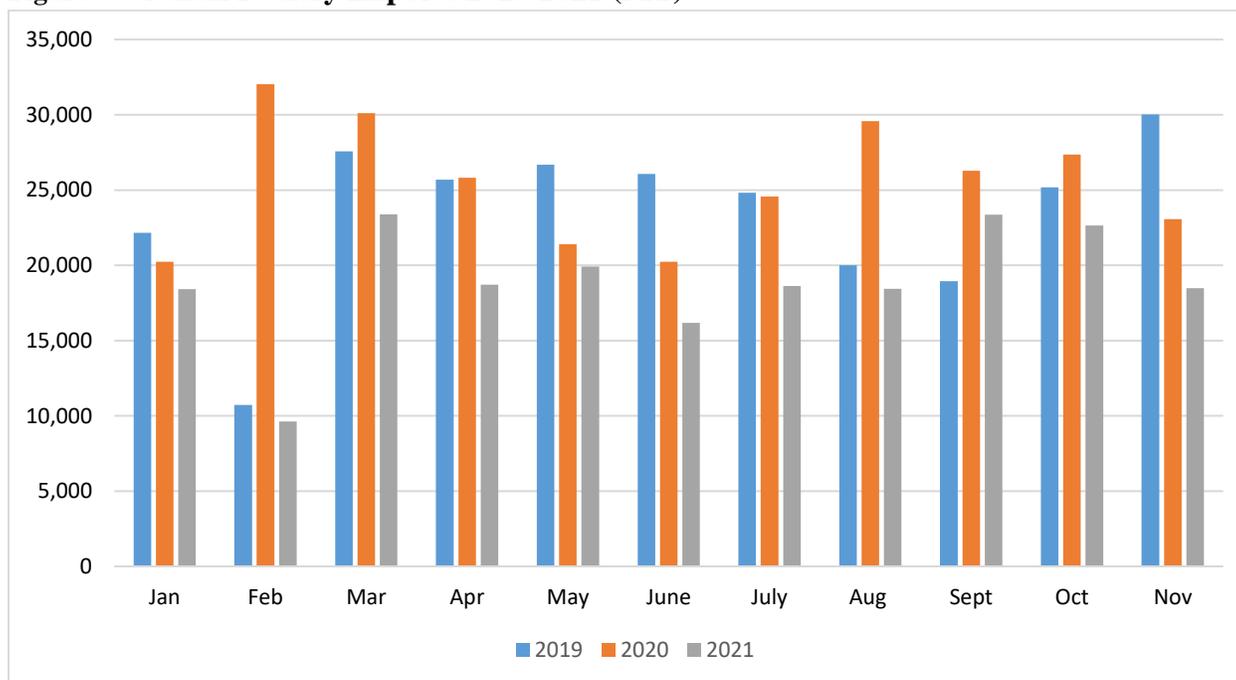
According to MARD’s October report, the total poultry flock is 523 million birds, up 4.4 percent from the same period in 2020. The live-weight poultry meat production in the first nine months of 2021 reached 1.3 million MT. Oversupply that led to low prices of broilers (even below cost) in the past year has discouraged some poultry farmers from restocking. Financial losses in the past year may limit small- and medium-scale farms from expanding production in 2022. According to MARD’s October livestock report, MARD set the 2022 a growth rate target of 5 percent for poultry production to reach about 1.8 million MT of live-weight poultry output.

Like the swine industry, the poultry industry also experienced disruptions in the market and supply chain due to COVID-19 related restrictions, especially in southern Vietnam. The closure of school and factory canteens, which are major consumers of poultry products, in addition to the shutdown of most of the wholesale and wet markets and scaled-down operations of food processing companies, also reduced the demand for poultry products. Record low pork prices shifted consumers away from poultry. Vietnam remains a price sensitive market, as pork meat prices in the lead up to Vietnam’s Lunar New Year, there is potential for higher demand for poultry meat.

Trade

From January - November 2021, Vietnam’s poultry meat imports fell sharply, down 26 percent compared to same period of 2020 due to lower demand.

Figure 6. Vietnam Poultry Imports 2019-2021 (MT)



(Source: AgroMonitor)

According to MARD, Vietnam has market access for its processed chicken products in seven countries: Japan, Hong Kong, Russia, Belarus, Kazakhstan, Armenia, and Kyrgyzstan. In the first nine months of 2021, Vietnam exported 1,365 MT of processed chicken products and increase of 36.5 percent from the same period in 2020, mainly to Japan.

Attachments:

No Attachments.

Attachments:

No Attachments.