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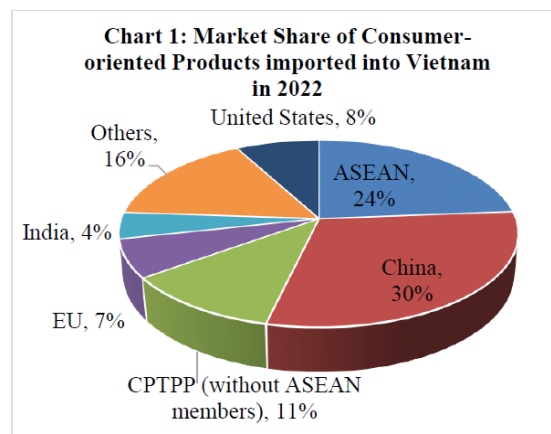
Report Highlights:

This report serves as a practical guide for U.S. exporters wishing to initiate or increase exports of U.S. consumer-oriented and seafood 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 useful contacts.

Market Fact Sheet: Vietnam

Executive Summary

Vietnam's economy grew significantly in 2022, boosted by domestic consumption, e-commerce, and a 9.5% increase in U.S. exports. However, 2023 saw a slowdown with a GDP growth of 5%. Despite being the second-largest supplier, U.S. products faced barriers compared to Vietnam's FTA partners.



Source: Trade Data Monitor, LLC (TDM)

ASEAN: Association of Southeast Asian Nations
 CPTPP: Comprehensive and Progressive Agreement for Trans-Pacific Partnership
 EU: European Union

Retail Food Industry

In 2022, Vietnam's retail sales increased by 13% to \$192 billion due to a surge in domestic consumption and 8% GDP growth. E-commerce also grew significantly, with sales reaching \$16.4 billion, a 26% increase from the previous year. See the Retail Foods report [VM2023-0036](#) for more information.

Hotel Restaurant and Institutional (HRI) Industry

In 2022, Vietnam's HRI market grew by 51% to \$24.6 billion. Despite a global economic downturn in 2023, the sector nearly returned to pre-pandemic revenue levels. Please see the most recent HRI GAIN report [VM2023-0055](#) for more details.

Food Processing Industry

In 2022, Vietnam's food processing and manufacturing sector grew by 9%, food retail revenue by 10%, and food service receipts surged by 52% due to post-Covid-19 economic recovery. For more details, please refer to GAIN report [VM2023-0012](#).

Quick Facts 2022

Total imports of Consumer-Oriented and Seafood Products: \$12.9 billion, ↓ 7%

Imports from the United States: over \$1 billion, ↑ 9%

Top 10 U.S. consumer-oriented products exported to Vietnam

- + Other consumer-oriented
- + Beef and beef products
- + Wine and related products
- + Processed fruit
- + Eggs and products
- + Condiments and sauces
- + Fresh fruit
- + Pet food
- + Food preparations
- + Processed vegetables

Food Industry by Channel (\$ billion)

Manufacture of food products	\$69.6 ↑ 4%
Manufacture of beverages	\$6.7 ↓ 5%
Exports of fishery products	\$8.9 ↑ 6%
Exports of fruits and vegetables	\$3.5 ↑ 8%
Exports of cashew nuts	\$3.6 ↑ 13%

Total retail sales of goods and services 2022: \$244 billion, up 20% over 2021

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 2022

Population	99.3 million
GDP (current US\$)	\$366 billion
GDP per capita (current US\$)	\$3,756

Sources: TDM; GSO; World Bank

Advantages	Challenges
U.S. products are perceived as safe and of 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	A combination of short supply and delays in shipments affects expansion of U.S. food and beverage products

Contact: FAS Vietnam

Office of Agricultural Affairs in Hanoi

Tel.: 84-24-3850 6106; Email: aghanoi@fas.usda.gov

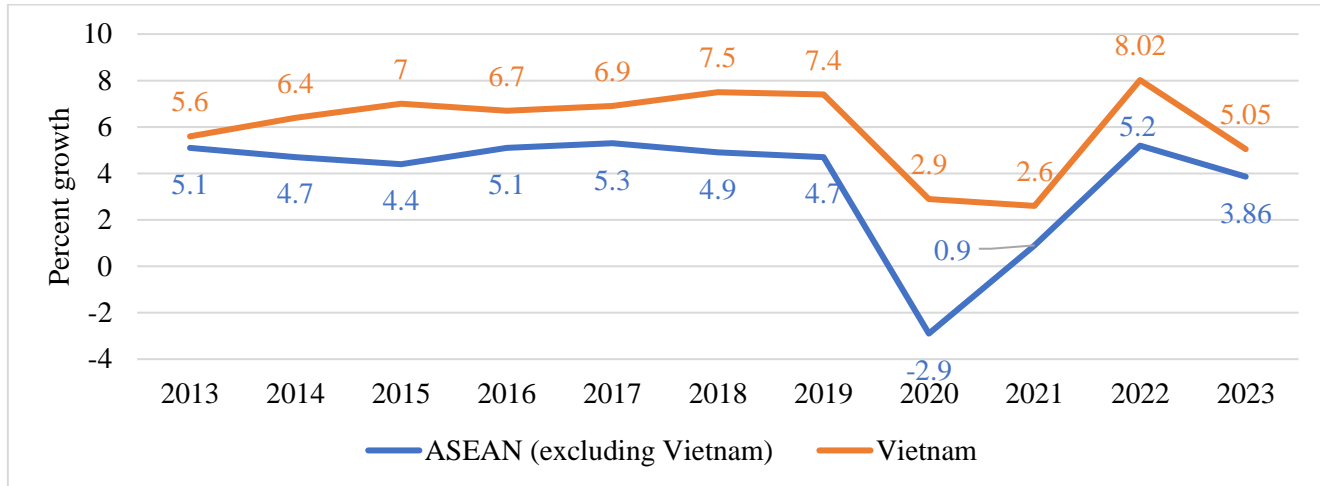
Office of Agricultural Affairs in Ho Chi Minh City

Tel.: 84-28-3520 4630; Email: atohochiminh@fas.usda.gov

SECTION I: MARKET OVERVIEW

Vietnam's economy faced significant global and domestic challenges in 2023. According to Vietnam's General Statistics Office, GDP growth fell to 5% in 2023, down sharply from 8% growth in 2022. This deceleration was primarily due to a drop in exports. The World Bank forecasts that Vietnam's GDP growth will gradually recover in the next few years, rising to 5.5% in 2024 and 6% in 2025 (see Figure 1).

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



Source: World Bank; GSO Vietnam

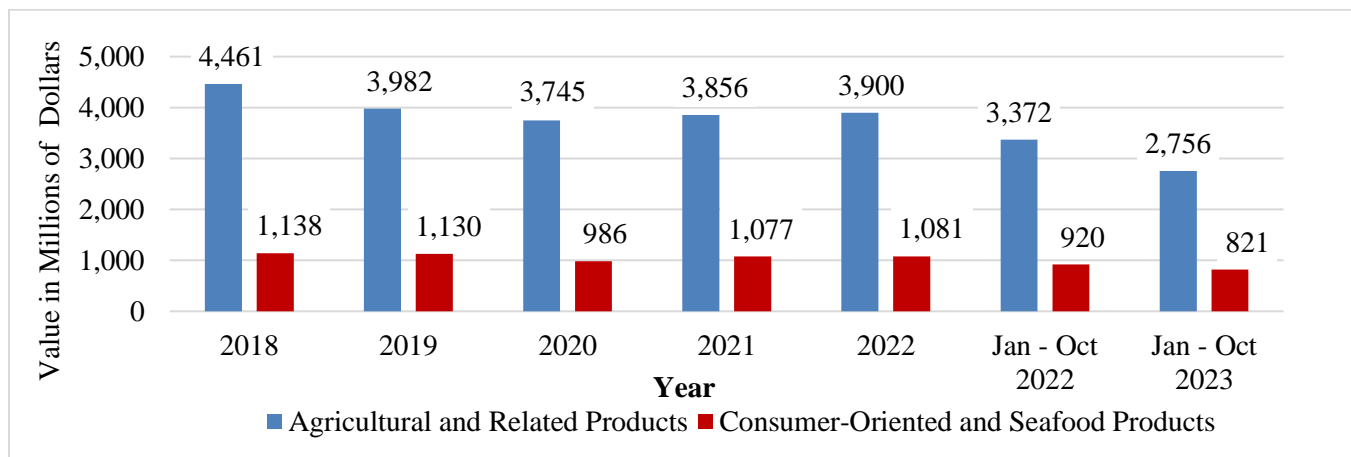
In 2023, Vietnam experienced a strong resurgence in its tourism sector. This growth was due to successful control of the COVID-19 pandemic and vigorous promotion of both domestic and international tourism. According to the Vietnam National Administration of Tourism (VNAT), Vietnam welcomed 12.6 million foreign visitors in 2023, 3.5 times higher than in 2022 and 70 percent of the number of tourists in 2019 prior to the pandemic. Total retail sales of consumer goods and services grew 9.6 percent in 2023 to \$256 billion¹. Sales of food and foodstuff rose by 13.7 percent. Despite the positive recovery in retail sales and tourism, Vietnam's overall economic growth slowed in 2023 due to a 4.4% drop in exports. This had an outsized impact on U.S. exports of wood and cotton to Vietnam, which are used by Vietnam to produce textiles and furniture for export.

However, the long-term prospect for consumer-oriented and seafood products in Vietnam remains positive. Vietnam has a large and growing population (approximately 100 million in 2023), a growing middle class (expected to reach 26 percent of the population by 2026, rising per capita income, a growing tourism sector, and growth in modern retail and e-commerce.

In the first ten months of 2023, global exports of consumer-oriented and seafood products to Vietnam exceeded \$13 billion, up 1.2 percent from the year before. The top five suppliers are China, India, the United States, Thailand and Cambodia.

The United States remains the second largest exporter of consumer-oriented and seafood products to Vietnam despite its growing tariff disadvantage in the market. However, the U.S. has been losing market share to other exports such as Canada, Australia and Europe who now enjoy tariff free or low tariff access due to FTAs with Vietnam. U.S. tree nut exports remain a bright spot despite tariffs of 8 to 30 percent if imported for local consumption. The majority of U.S. tree nut exports to Vietnam are for further processing and then re-exported to third countries though and are therefore exempted from these tariffs. Non-alcoholic beverages, fruit and vegetable juices, fresh vegetables, and pork were other bright spots for U.S. exports to Vietnam in 2023. Consumer-oriented and seafood products account for approximately one third of the total U.S. agricultural exports to Vietnam (Figure 2).

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



Source: Trade Data Monitor, LLC (TDM)

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

Table 1: Advantages and Challenges

Advantages	Challenges
Demand for high-value consumer-oriented and seafood 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 continue to offer opportunities for imported food products, including those from the United States.	U.S. consumer-oriented and seafood products have become less competitive than those imported from ASEAN members and Vietnam’s FTA partners due to higher tariffs.
Vietnam’s continued global economic	Vietnam remains a price-sensitive market.

integration creates more openings for foreign products and better alignment with international standards.	
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.	Rising, and already high, rental costs increase retail prices while purchasing power is weakening due to the slowdown of Vietnam’s economy.
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.

SECTION II: EXPORTER BUSINESS TIPS

Vietnam is a challenging market with fierce competition, complex regulations, high import tariffs, and 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 Consumers Tastes and Trends attached in Appendix 1 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 FAIRS report [VM2023-0030](#) or contact 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 that wish to export chilled and frozen meat, poultry, and frozen seafood products to Vietnam must register processing facilities with Vietnam’s Ministry of Agricultural and Rural Development (MARD)/Department of Animal Health (DAH). Once DAH 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 2 and Appendix 3 and contact usda4cinc25@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

- DAH has recently undergone a transition in the handling of processing facility applications for meat and poultry exports to Vietnam. As a result of this change, it is anticipated that processing times will take longer.
- Export certificate(s) are strictly required. The export certificates are commonly known as health certificates (HCs) in the Vietnam's meat and poultry industry.
- The HC number MUST MATCH the certificate number on the box labels. MARD/DAH 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 this link for further details: https://www.aphis.usda.gov/aphis/ourfocus/animalhealth/export/iregs-for-animal-product-exports/sa_international_regulations/sa_by_country/sa_v/ct_product_vietnam
- Consolidated shipments which include products from unregistered facilities are subject to burdensome paperwork and face heavy fines or rejection.
- 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 which are diverted from other countries to Vietnam will face a high risk of being rejected if the shipments had already landed at ports of previous importers, 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 VIII of Decree 26/2019 guiding

the implementation of the Fish Law,¹ are subject to a “Risk Assessment Process.” Please refer to the attached “*Decree 26- Appendix VIII*” and “*20190729-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 and fresh fruits, roots, living plants, and living parts of plants are subject to a pest risk assessment (PRA). Please refer to GAIN report [VM4057](#) for quarantine and PRA regulations and GAIN report [VM2021-0104](#) for a list of HS codes subject to plant quarantine regulations for further details. Products listed in Section 9, except some items which are in sealed packaging for retail, must be accompanied by a phytosanitary certificate.

To date, Vietnam has officially granted access for eight varieties of U.S. fresh produce: apples, cherries, grapes, pears, blueberries, oranges, grapefruit, and U.S. fresh potatoes (not seed potatoes). For more details on varieties approved for import into Vietnam, please refer to the attached “List of U.S. Fresh Produce 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 [VM8016](#) 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), which is currently 35 percent for wine (*less than 20 percent alcohol by volume*) and 65 percent for beer and spirits (*20 percent alcohol by volume and above*). The GVN has shifted taxation from the import price to the “selling (retail)” price. Please refer to [VM6056](#) for more details.

e) Permissible Food Additives and Flavors

The MOH of Vietnam changed some rules on food additives, flavors, and processing aids in Circular 17/2023. This Circular follows the list of food additives and how much of them can be used from the newest version of the GSFA CODEX STAN 192-1995. Vietnam also allows the use of flavors that have been checked by JECFA or called GRAS by FEMA or accepted by the EU. Vietnam updates the list of processing aids that can be used for food. Circular 17/2023 started on November 9, 2023. For more information, please see [VM2023-0073](#).

¹ Decree 26/2019 guiding the implementation of the Fish Law is available [here](#).

3) Country Language Labeling Requirements

Labeling requirements for goods circulated in the Vietnamese market, including imported food, are stipulated by Decree 43/2017. In short, all imported foods, except for those products destined for further processing and repackaging in Vietnam, must have secondary labels listing contents in Vietnamese that are consistent with the original label and supplement other mandatory contents that are required by the nature of the goods. On December 9, 2021, Decree 111/2021/ND-CP was issued to amend and supplement the labeling requirements for imported goods, especially food, beverages, and agricultural products. Some of the key changes are 1) the original label of imported goods must include the origin of goods and the name of the manufacturer or the entity responsible for the goods in the country of origin 2) the Vietnamese language label must include the mandatory content translated from the original label 3) the ingredients declaration must specify the name, group, and nature of additives, sweeteners, colorants, and flavorings 4) the nutritional composition and values must be labeled according to the Ministry of Health's guidance. Please refer to GAIN report [VM2021-0110](#) and for further details.

4) Tariffs and FTAs

As of 2023, U.S. exporters continue to face tariff disadvantages in Vietnam, which can reduce the competitiveness of U.S. products against those from countries that have Free Trade Agreements (FTAs) with Vietnam.

Vietnam has signed significant free trade agreements in the last three decades with over 50 nations, including individual-based agreements as well as those signed via economic blocs, including 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). Generally speaking, products from Vietnam's FTA partners will have lower tariffs and other advantages than those from Most Favored Nations (MFNs) including the United States.

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 FDI. 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:

By decree 57 signed on May 25, 2020, and decree 101/2021/ND-CP on November 15, 2021, Government of Vietnam has reduced most favored nation (MFN) tariffs on certain agricultural products. More details are available at GAIN report [VM2020-0051](#), and [VM2021-0097](#). On May 31, 2023, the Government of Vietnam issued Decree 26/2023/ND-CP, lowering MFN tariff rates on ethanol to 10 percent from 15 percent [VM2023-0035](#).

FTAs with other trading partners, especially the reduction and elimination of tariffs, threaten the competitiveness of U.S. food and agricultural exports. For more about FTA competition in Vietnam, please refer to GAIN report [VM2022-0038](#).

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Distribution Channels

Please see an outline of distribution channels for imported U.S. products in the Vietnamese market in Appendix 6.

Market Trends

In 2023, online shopping and take-away purchases become a prevalent trend across Vietnam, largely influenced by the COVID-19 pandemic. Even with the lifting of COVID-19 restrictions, Vietnamese consumers have continued to prefer online shopping, take-away food from restaurants, and the use of delivery services. Food service and food retail businesses have responded to this trend by expanding their online channels, partnering with e-commerce platforms, and coordinating with delivery service providers to meet the growing demand for online shopping. According to the [e-Conomy SEA Report 2023](#) by Google, Temasek, and Bain & Company, Vietnam's 2023 digital economy is expected to reach a total value of \$30 billion - a 19 percent year-on-year surge. E-commerce grew by 11 percent during this period.

Social media channels including Facebook, Instagram, Zalo, and YouTube remain key platforms for advertising food and beverage products in Vietnam. Their extensive reach, connectivity, and cost-effectiveness make them an ideal choice for businesses.

Canned food, processed food, frozen meat and fish, tree nuts, and beverages continue to be the top consumer-oriented products for online sales. These items have maintained their strong presence on e-commerce platforms due to their convenience and long shelf-life. On the other hand, perishable products

such as fresh produce and dairy products are primarily distributed through offline channels.

SECTION V: AGRICULTURAL and FOOD IMPORTS

Table 2: Global and U.S. Exports of Consumer-Oriented and Seafood Fish Products to Vietnam

Values in Million U.S. dollars	Global exports			U.S. Exports			U.S. Market Share		
	2020	2021	2022	2020	2021	2022	2020	2021	2022
Consumer-oriented products									
Dairy Products	1124	1,343	1,301	185	276	224	16%	21%	17%
Tree Nuts	2322	1,726	1,516	140	167	173	6%	10%	11%
Fresh Fruit	2678	1,997	1,723	135	100	121	5%	5%	7%
Poultry Meat & Prods. (ex. eggs)	300	246	322	128	100	130	43%	41%	40%
Soup & Other Food Preparations	778	965	1,192	89	100	102	11%	10%	9%
Chocolate & Cocoa Products	64	143	126	14	77	44	22%	54%	35%
Non-Alcoholic Bev. (ex. juices, coffee, tea)	543	565	663	48	67	59	9%	12%	9%
Beef & Beef Products	677	847	830	59	44	92	9%	5%	11%
Processed Vegetables	586	713	793	27	19	18	5%	3%	2%
Pork & Pork Products	444	530	240	54	14	7	12%	3%	3%
Tea	221	258	160	10	14	3	5%	5%	2%
Processed Fruit	130	143	189	9	8	12	7%	6%	6%
Bakery Goods, Cereals, & Pasta	283	345	420	5	5	5	2%	1%	1%
Distilled Spirits	357	474	375	12	3	3	3%	1%	1%
Meat Products NESOI	75	116	128	3	3	2	4%	3%	2%
Condiments & Sauces	96	99	149	1	2	2	1%	2%	1%
Wine & Related Products	60	68	107	3	2	5	5%	3%	5%
Dog & Cat Food	29	38	49	0	1	1	1%	3%	2%
Eggs & Products	12	15	22	1	1	2	8%	7%	9%
Beer	33.5	25	40	0	0	0	0%	0%	0%
Chewing Gum & Candy	72	73	107	0	0	0	0%	0%	0%
Coffee, Roasted and Extracts	39	51	71	0	0	1	0%	0%	1%
Fresh Vegetables	1169	1,158	1,107	3	0	0	0%	0%	0%
Fruit & Vegetable Juices	21	16	27	0	0	0	2%	3%	1%
Mfg. Tobacco	544	713	345	0	0	1	0%	0%	0%
Nursery Products & Cut Flowers	151	112	434	0	0	0	0%	0%	0%
Spices	390	390	395	1	0	1	0%	0%	0%
Agricultural Related Products									
Seafood Products	1999	2,106	2,715	58	74	72	3%	4%	3%
Total	15,198	15,275	15,546	985.6	1,079	1,081	6%	7%	7%

Source: TDM and U.S. Census Bureau Trade Data

SECTION VI: KEY CONTACTS AND FURTHER INFORMATION

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

FAS has two offices in Vietnam, one at the U.S. Embassy in Hanoi and the other at the U.S. Consulate General in Ho Chi Minh City.

FAS Hanoi, Vietnam

Rose Garden Tower, 3rd Floor, 170 Ngoc Khanh, Ba Dinh District, Hanoi

Tel: (84.24) 3850-5000 Email: aghanoi@fas.usda.gov

FAS Ho Chi Minh City, Vietnam

8th floor, Diamond Plaza, 34 Le Duan Blvd, District 1, HCMC

Tel: (84.28) 3520-4630 Email: atohochiminh@fas.usda.gov

APHIS Hanoi, Vietnam

Rose Garden Tower, 3rd Floor, 170 Ngoc Khanh, Ba Dinh District, Hanoi

Tel: (84.24) 3850-5000 Email: john.j.hurley@usda.gov

2) State Regional Trade Groups

<http://www.fas.usda.gov/programs/market-access-program-map/state-regional-trade-groups>.

3) 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 Appendix 7.

4) American Chamber of Commerce in Vietnam

The American Chambers of Commerce in Vietnam (AMCHAM) serve as the point of contacts for members of the American business community. AmCham Hanoi and AmCham HCMC have various committees that member 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

5) Key Government Contacts

MARD/Plant Protection Department (PPD) www.ppd.gov.vn

MARD/Department of Animal Health (DAH) www.cucthuy.gov.vn

MARD/Directorate of Fisheries <https://tongcucthuysan.gov.vn/vi-vn/>

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

Ministry of Industry and Trade/Department of Science and Technology www.moit.gov.vn

Attachments: [Appendix 1 - Local Business Customs, and General Consumers Tastes and Trends .pdf](#)

[Appendix 2 - Updated Form 9 Decree 15 Instruction \(Dec 2023\).pdf](#)

[Appendix 3 - Updated Form 9 Decree 15 \(2023-12\).pdf](#)

[Appendix 4 - Decree 26 - Appendix VIII.pdf](#)

[Appendix 5 - List of U.S. fresh produce approved for import to Vietnam.pdf](#)

[Appendix 6 - Distribution Channels of Imported U.S. Products in Vietnam.pdf](#)

[Appendix 7 - USDA Cooperators Active in Vietnam.pdf](#)

[Appendix 8 - List of fresh fruits approved for import to Vietnam.pdf](#)