OMIS Report
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First Activity for SEA FSIH INDUSTRY AUTHORITY

Customer Name:
SEA FISH INDUSTRY AUTHORITY

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**EXECUTIVE SUMMARY**

Sea Fish Industry Authority (Seafish) is funded by a levy on the first sale of seafood landed and imported in the UK. It aims to support and improve the environmental sustainability, efficiency and cost-effectiveness of the industry, as well as promoting sustainably-sourced seafood.

Mr Malcolm Large, of Sea Fish Industry Authority commissioned an Overseas Market Introduction Service (OMIS) report to identify information regarding the Vietnam seafish/seafood industry.

UKTI Vietnam has carried out the research to identify the information requested by Sea Fish Industry Authority. All the findings are showed in our report below:
**METHODOLOGY**

The Trade and Investment Sections of the British Embassy in Hanoi and the British Consulate General in Ho Chi Minh City (HCMC) have identified the relevant information and potential contacts through trade directories, Yellow Pages, databases and business contacts, and have compiled a verified list of potential companies. The list includes state-owned, private, joint venture and foreign owned companies.

The UK Trade & Investment Officers in both teams have contacted a number of Government Departments, Institutions, Associations, Trade Promotion Organisations and companies that work and have experience in this industry to seek for information based on Seafish Industry Authority’s requirements. UKTI also carried out their own research based on information available in the UK Trade & Investment database and other reliable publications.

The team will contact by phone, email or visits the targeted companies to learn more about their scope of activities, the market information, importing regulations, consumer trends and other trade factors. These companies include state-owned, private, joint ventures and foreign companies. We will collate the information needed and produce a verified report as per your request. The report will cover a brief overview of the sector which will include activities, aquaculture, processing; Vietnamese import and export of seafood, regulations and tariff, major players in the industry (profile of produce/ manufacturers and relevant institutions/ organisations); Planning for industry and business opportunities for UK companies.
REPORT

I. GENERAL OVERVIEW OF THE MARKET

1. OVERVIEW

Viet Nam is a sea nation with a long coastline of over 3,260 km and more than 3,000 islands and islet scattered offshore. There is also a network of about 2,860 rivers and estuaries countrywide and 811,700 ha of freshwater, 635,400 ha brackish water, 125,700 ha of coves and 300,000-400,000 ha of wetland areas. All these are very favourable conditions for the development of the seafood industry in the country.

Thanks to the country’s advantageous geographical conditions, the fisheries industry is among the key industries in Viet Nam. It ranks third in terms of export value, after textile and garment and crude oil industries and creates jobs for about 5 million people. The total fisheries production has kept rising over the last ten years from 2 million tonnes in 2000 to nearly 5.9 million tonnes in 2012. In the first three quarters of 2013, the country’s total fisheries production was 4.49 million tonnes, a 2.8% year on year increase, of which 2.1 million tonnes was from catch production and 2.3 million tonnes from aquaculture. Viet Nam currently ranks fourth in the world in seafood exporting. The most important seafood products in Vietnam are pangasius, shrimp, tuna and mollusks (including clams, oysters, mussels, squid and cuttlefish). In the third quarter of 2013, Viet Nam’s seafood exports increased by 17.4% to US$1.9 billion, led by shrimp exports which accounts for 43% followed by pangasius with 26.5%.

Given its vital role, the fisheries industry has strong commitment from the Government to develop. The Government of Viet Nam aims to turn the country into a global leading seafood exporter which is set out in the fisheries development strategy plan to 2020. Under this plan, the seafood industry is expected to contribute 30-35% of the agro-forestry-fisheries sector’s GDP and the total fisheries production to reach 6.5-7 million tonnes, of which aquaculture production accounts for 65-70%, by the end of 2020.

However, Viet Nam’s fisheries industry is still under-developed and in scattered shape. In terms of catch production, the country’s fishing boat fleets are very simple, small and not well equipped and therefore can hardly afford offshore catching activities. This, in turn, leads to the risk of over-exploitation. Furthermore, the lack of good facilities for pre-processing has a negative impact on the quality of catch products. In terms of aquaculture, challenges include the limited access to capital, the modest knowledge and skills of farmers in applying technologies in aquaculture activities, especially when facing epidemic outbreaks, unfair competition among seafood companies and sometimes their ignorance in guaranteeing to meet requested standards.

2. CATCHING ACTIVITIES

Geographically, there are four main fishing areas in Viet Nam: Gulf of Tonkin (shared with China), Central Viet Nam, South-eastern Viet Nam and South-western Viet Nam (part of the Gulf of Thailand). Marine catches are highest in Central and Southern Viet Nam, especially from Khanh Hoa Province to Ca Mau Province. Fishing areas can also be divided into inshore-coastal fishery and offshore fishery. Inshore waters are considered less than 30m deep in the Tonkin Gulf and in the South and less than 50m deep in the Centre.

However, catching activities in Viet Nam are still small scale and under-developed compared to other regional sea nations like Malaysia or Indonesia. Based on statistics provided by the Ministry of Agriculture and Rural Development (MARD), Viet Nam has a total fishing fleet of about 130,000 boats, of which 20.7% are over 90hp, 30.4% are 20-
90hp and 49% are under 20CV. Most of these are wooden boats and equipped with second-hand truck engines and operated within 3-10 nautical miles offshore.

According to a report by MARD, in the first three quarters of 2013, the total catch production was 2.139 million tonnes (MT), up 3.2% year on year, of which marine catch was 2.001 million tonnes, up by 3.3% year on year. Some provinces were reported to enjoy high catch landings such as Kien Giang (302,434 tonnes), Ca Mau (117,055 tonnes), Ben Tre (104,401 tonnes), Binh Thuan (138,800 tonnes) and Vung Tau (215,135 tonnes).

<table>
<thead>
<tr>
<th>VIETNAM FISHERIES PRODUCTION, JAN – SEP 2013 (thousand MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
<tr>
<td>----</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td>1. Catching</td>
</tr>
<tr>
<td>1.1. Marine</td>
</tr>
<tr>
<td>1.2. Inland</td>
</tr>
<tr>
<td>2. Aquaculture</td>
</tr>
</tbody>
</table>

Source: VASEP

Most of offshore fishing boats in Vietnam focus on tuna catching. Tuna catches were 13 MT in the first three quarters of 2013. The three main tuna fishing provinces are Phu Yen, Binh Dinh and Khanh Hoa. After soaring in 2012 total tuna catches were shrinking in early 2013. Total tuna export value in the first three quarters of 2013 was US$ 415 million. Many owners of tuna catching boats had to reconsider their operation after suffering heavy losses. It is a fact that while investment for tuna catching is very high in Vietnam, it is the under-developed chain *tuna catching – preservation – wholesale – pre-processing* that brought the country’s tuna export value down.

3. **AQUACULTURE**

As encouraged by the Government, aquaculture production has been growing considerably in the last ten years with average annual growth rate of 12.7%, making significant contribution to the country’s total fisheries production. In the third quarter of 2013, Viet Nam’s aquaculture production increased by 2.3% year on year to 2.359 million tonnes. Pangasius and shrimp continue to be the two major products.

<table>
<thead>
<tr>
<th>Aquaculture production in 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Aquaculture production (thousand tonnes)</strong></td>
</tr>
<tr>
<td>including:</td>
</tr>
<tr>
<td>Shrimp</td>
</tr>
<tr>
<td>Pangasius</td>
</tr>
<tr>
<td>Farming areas (ha)</td>
</tr>
<tr>
<td>including:</td>
</tr>
<tr>
<td>Shrimp</td>
</tr>
<tr>
<td>Pangasius</td>
</tr>
</tbody>
</table>

Source: VASEP
a. Pangasius
The area by Tien River and Hau River in the Mekong Delta has favourable natural conditions for pangasius farming. The provinces in the area with the highest harvest production of pangasius is Dong Thap, An Giang, Can Tho, Vinh Long and Ben Tre. In 2012, the five listed provinces accounted for over 87% of the country’s total harvest production which was 1.19 million tonnes.

![Graph showing the percentage share of various provinces in pangasius harvest production.]

By September 2013, harvest production of pangasius was reported to reach 723 thousand tonnes on a farming area of 5,600 hectares. In recent years, farmers suffered losses and many of them could not re-invest in their aquatic farms due to the rising cost for fish seed and fish, limited access to loans, as well as falling prices of ex-farm pangasius. Many seafood companies chose to co-operate with farmers or invest in their own aquatic farms in order to ensure supply both in quantity and quality. It was estimated by Vasep that 65% of the total 1.2 million ex-farm pangasius production in 2012 came from seafood companies’ investments.

**Ratio of farming areas self-investment by enterprises in some provinces**

![Graph showing the percentage of self-investment by enterprises in various provinces.]

Source: VASEP
b. Shrimp

Shrimp farms in Vietnam are concentrated in brackish water areas in South-central provinces such as Khanh Hoa, Phu Yen, Ninh Thuan and some provinces in the Mekong Delta such as Long An, Tien Giang, Ben Tre, Tra Vinh, Soc Trang, Ca Mau and Kien Giang. Shrimp production increased sharply during the period 2006-2010 by approximately 56% from 300,000 tonnes to almost 500,000 tonnes before it slowed down and slumped by 3.9% in 2012. According to the Fisheries Directorate of Vietnam, in 2012 there were 30 cities/provinces countrywide engaging in brackish shrimp farming. The total farming area was 657,523 hectares, a 0.2% increase year on year and the total shrimp production was 476,424 tonnes, down 3.9% year on year. Black tiger shrimp accounted for 94.1% in area and 62.7% in production and whiteleg shrimp accounted for 5.9% in area and 27.3% in production. The shrinking in production from 2011 was caused mainly by the outbreak of EMS, especially on black tiger shrimp. Moving to the first three quarters of 2013, brackish shrimp farming is reported to enjoy high production and increased selling price.

<table>
<thead>
<tr>
<th>Provinces</th>
<th>Black Tiger Shrimp</th>
<th>Whiteleg shrimp</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Area (ha)</td>
<td>Production (ton)</td>
</tr>
<tr>
<td>Ca Mau</td>
<td>266,650</td>
<td>85,520</td>
</tr>
<tr>
<td>Bac Lieu</td>
<td>120,595</td>
<td>43,532</td>
</tr>
<tr>
<td>Kien Giang</td>
<td>86,700</td>
<td>21,023</td>
</tr>
<tr>
<td>Soc Trang</td>
<td>27,740</td>
<td>11,000</td>
</tr>
<tr>
<td>Ben Tre</td>
<td>27,836</td>
<td>9,850</td>
</tr>
</tbody>
</table>

Source: VASEP

c. linkages among major players

Aquaculture fisheries value chain

- Seed
- Aqua-feed
- Aqua activities
- Aqua pharma
- Processing, Packaging
- Export
- Consumption
d. Aqua feed

According to the Fisheries Directorate, there are around 130 aqua feed factories in Vietnam with total yield of 3.77 million tonnes which meet 85.6% of the domestic demand. Though the percentage of imported aqua feed is gradually going down, Vietnam is still dependent on foreign supply of raw materials for aqua feed. The percentage of imported raw materials is still over 50%. The market of shrimp feed is currently the playing field for foreign players only with major names such as Uni-President (Taiwan, 30-35% market share), CP (Thailand), Tomboy (France), etc. In terms of pangasius feed, foreign players hold a total market share of over 50% with major names such as Cargill, Green Feed, Proconco, Anova, Uni-President, etc. and the rest belong to a few Vietnamese companies dominated by Viet Thang Company, a subsidiary of Hung Vuong Seafood Company, with about 45% market share.

4. PROCESSING

Seafood processing is the final stage which enhances the value of the seafood products before bringing to the market for consumption. The processed seafood is not only served for domestic but also for export markets.

In addition, due to the global crisis, a lot of Vietnamese seafood companies in the region have fallen into insolvency, others have been operating at a moderate level. Only a few companies have luckily escaped the biggest difficulties and now are trying to resume production.

Vietnam has a large and complex fish and seafood processing industry. According to government sources, there are more than 900 medium to large businesses (companies, co—
operatives and state-owned enterprises including more than 534 seafood processing plants that are licensed by the National Agro-Forestry-Fisheries Quality Assurance Department (NAFIQAD), about 400 frozen factories but more than 393 factories qualified for exporting to the EU) involved in processing fish and seafood. In addition to this, there are thousands of small processors that operate at a localised level and produce traditional products for the communities.

II. IMPORT & EXPORT SEAFOOD INTO/ FROM VIETNAM

1. IMPORT

Vietnam’s domestic fish and seafood market is mainly oriented around locally produced fish and seafood. Imports of fish and seafood are small, relative to local production but growing gradually due to the three main following reasons:

- The country’s seafood output still cannot meet the demand for raw materials of seafood exporting processing companies.

- As a result of an increase in foreign visitor arrivals and increased business-related entertainment, there has been a growing need of imported fresh/chilled whole fish, especially Atlantic and other salmon and some frozen fish, particularly frozen salmon for use by the higher-end food service industry and high-end retail outlets.

- Due to the growing number of expatriates and higher incomes amongst the Vietnamese middle income groups, there has been an increase in the imports of frozen salmon, tuna and some other whole frozen fish for repacking and sale through retail channels and for use in the food service industry.

   **Import seafood into Vietnam in 2013 (as of November 2013)**

<table>
<thead>
<tr>
<th>No</th>
<th>HS Code</th>
<th>Value (VND)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0301 to 0305 and 1604 (except tuna, pangasisus)</td>
<td>230,248,981</td>
</tr>
<tr>
<td>2</td>
<td>Tuna (code 03 and 16)</td>
<td>140,071,226</td>
</tr>
<tr>
<td>3</td>
<td>Pangasius (code 03 and 16)</td>
<td>247,059</td>
</tr>
<tr>
<td>4</td>
<td>Crabs and other crustaceans (HS03 and 16)</td>
<td>14,784,563</td>
</tr>
<tr>
<td>5</td>
<td>Mollusk (code 0307 and 16)</td>
<td>32,429,007</td>
</tr>
<tr>
<td>6</td>
<td>Mollusk HMV (code 307 and 16) (except squid and octopus)</td>
<td>11,332,077</td>
</tr>
<tr>
<td>7</td>
<td>Other mollusk (except squid, octopus and bivalve molluscs)</td>
<td>89,391</td>
</tr>
<tr>
<td>8</td>
<td>Shrimp (all types)</td>
<td>169,316,663</td>
</tr>
</tbody>
</table>

   Source: VASEP

2. EXPORT

**Seafood exports**

Vietnam currently ranks fourth in the world for seafood exports. The country’s seafood exports have made great strides during the period 1995-2012, from the humble US$550 million to US$6.13 billion in 2012, an average growth rate of 15.6%. Shrimp and pangasius remain two major seafood export products, followed by tuna and cephalopod. The percentage of seafood exports coming from aquaculture is on the increase and is currently at 60%.
Seafood exports value and growth from the period of 1995-2012

Wei [Image 277x455 to 308x466] 11 183x457 Export value 188x445 Growth Value Seafood exports value and growth from the period of 1995-2012 162x383 VIETNAM SEAFOOD EXPORT Q1-Q3/2013 (US$ million) 98x291 Products Q1/2013 Q2/2013 Q3/2013 Compared to the same period of 2012 (%) Jan - Sep 2013 Compared to the same period of 2012 (%) Shrimp 424.697 678.177 960.729 +57.3 2,063.603 +26.9 - Whiteleg shrimp 154.142 301.415 523.472 +167.0 979.029 +84.6 - Black tiger shrimp 230.711 329.873 523.472 +9.8 943.388 +3.8 Pangasius 388.493 461.255 424.210 -3.2 1,273.958 -1.4 Tuna 154.071 139.593 121.099 -18.3 414.763 -4.5 Cephalopod 86.843 105.520 117.147 -5.4 309.510 -17.2 Bivalve mollusk 18.061 a20.584 15.985 -15.0 54.631 -4.1 Other mollusk 0.482 0.341 0.475 +55.0 1,297 +83.7 Crab, swimming crab & other crustacean 17.855 18.603 34.490 -1.8 70.949 -12.3 Other marine finfish 170.484 214.397 226.555 -7.8 611.436 -5.7 TOTAL 1,260.987 1,638.470 1,900.691 +17.3 4,800.147 +6.4 Source: VASEP
**Shrimp exports**

Shrimp continues to be Viet Nam’s leading seafood export product. Shrimp exports account for the largest part (43%) of Viet Nam’s total seafood export volume. The value of shrimp exports in 2012 was US$2.24 billion and reached US$2.06 billion by the end of the third quarter of 2013, up by 26.9% year on year. During this period, whiteleg shrimp export brought about US$979 million, up by 84.6% year on year and US$943 million came from black tiger shrimp export, up by 3.8% year on year.

The rise in shrimp sales in the first three quarters of 2013 was thanked to the shortage of shrimp worldwide, the rise of the shrimp price and the successful attempt to put the EMS outbreak under control. There was a shift in the structure of Vietnam’s shrimp exports in which the proportion of whiteleg shrimp kept growing and surpassed the proportion of black tiger shrimp by the end of the third quarter of 2013. Export of whiteleg shrimp to main markets increased, in most cases due to the shift by consumers to using cheaper shrimps while facing economic downturn.

**Structure of Vietnam exported shrimp products Jan-Sep 2013 (Value)**

*Source: VASEP*
### EXPORTED SHRIMP PRODUCTS, JAN – SEP 2013

<table>
<thead>
<tr>
<th>Products</th>
<th>Value (US$)</th>
<th>Proportion (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whiteleg shrimp (1)</td>
<td>979,028,803</td>
<td>47.4</td>
</tr>
<tr>
<td>Including:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Processing whiteleg shrimp (HS code 16)</td>
<td>412,505,357</td>
<td></td>
</tr>
<tr>
<td>- Canned processed whiteleg shrimp (HS code 16)</td>
<td>555,884</td>
<td></td>
</tr>
<tr>
<td>- Frozen/ fresh/ live whiteleg shrimp (HS code 03)</td>
<td>565,967,561</td>
<td></td>
</tr>
<tr>
<td>Black tiger shrimp (2)</td>
<td>943,388,112</td>
<td>45.7</td>
</tr>
<tr>
<td>Including:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other processed black tiger shrimp (HS code 16)</td>
<td>146,343,596</td>
<td></td>
</tr>
<tr>
<td>- Frozen/ fresh/ live black tiger shrimp (HS code 03)</td>
<td>797,044,516</td>
<td></td>
</tr>
<tr>
<td>Other marine shrimp (3)</td>
<td>943,388,112</td>
<td>6.8</td>
</tr>
<tr>
<td>Including:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other canned processed shrimp (HS code 16)</td>
<td>4,335,193</td>
<td></td>
</tr>
<tr>
<td>- Other processed shrimp (HS code 16)</td>
<td>85,777,782</td>
<td></td>
</tr>
<tr>
<td>- Other dried shrimp (HS code 03)</td>
<td>2,861,008</td>
<td></td>
</tr>
<tr>
<td>- Other frozen/ fresh/ live shrimp (HS code 03)</td>
<td>48,211,829</td>
<td></td>
</tr>
<tr>
<td><strong>Total (1+2+3)</strong></td>
<td><strong>2,063,602,726</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Source: VASEP

In early 2013, the top import markets of Viet Nam shrimp were US, Japan, EU, China, South Korea, Australia, Canada, Taiwan, Switzerland and ASEAN accounting for a total of over 96 percent of the country’s shrimp exports. With an increase of 127.7% in shrimp sales to the US, this market replaced Japan to be the largest importer of Vietnam shrimp. This period also saw a recovery in shrimp export to the EU with a 45% increase year on year. Shrimp exports to the three leading markets within EU which are Germany, the UK and France grew remarkably at 24.8%, 65% and 71.8% respectively. Shrimp exports to China also soared by 57.6% and if this trend continues, China is expected to replace EU to become the third largest importer of Viet Nam shrimp.

### VIETNAM SHRIMP EXPORTS, QI – QIII/2013 (US$ mil)

<table>
<thead>
<tr>
<th>Markets</th>
<th>QI/2013</th>
<th>QII/2013</th>
<th>QIII/2013</th>
<th>Compared to QIII/2012 (%)</th>
<th>Jan- Sep 2013</th>
<th>Compared to the same period of 2012 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The U.S</td>
<td>87.729</td>
<td>164.577</td>
<td>290.429</td>
<td>127.7</td>
<td>542.735</td>
<td>62.6</td>
</tr>
<tr>
<td>Japan</td>
<td>107.457</td>
<td>186.468</td>
<td>203.181</td>
<td>23.2</td>
<td>497.106</td>
<td>12.8</td>
</tr>
<tr>
<td>EU</td>
<td>56.604</td>
<td>81.298</td>
<td>125.708</td>
<td>40.5</td>
<td>263.609</td>
<td>14.8</td>
</tr>
<tr>
<td>Germany</td>
<td>14.093</td>
<td>18.464</td>
<td>29.125</td>
<td>24.8</td>
<td>61.682</td>
<td>2.7</td>
</tr>
<tr>
<td>The U.K</td>
<td>10.491</td>
<td>14.345</td>
<td>25.991</td>
<td>65.0</td>
<td>50.827</td>
<td>34.2</td>
</tr>
</tbody>
</table>
### Pangasius exports

From 2000 to 2011, Viet Nam’s pangasius export grew by 40 times in volume, from 17,000 tonnes to 660,000 tonnes and by 45% in value from US$40 million to US$1.856 billion. However, pangasius exports have been shrinking since 2012. The total export value in 2012 was US$1.74 billion, a 3.4% decrease year on year, mainly due to the decline of pangasius imports into the US and EU. The US and EU imported 47.5% of Viet Nam’s total exported pangasius in 2011 but the number went down to 45% in 2012. By the end of the third quarter of 2013 the total export value continued to drop by 1.4% year on year to US$1.273 billion. In contrary to the decline in export value, export markets were growing in number from 139 countries and territories in 2011 to 142 in 2012 and to 149 in 2013.
The total value of pangasius exported to the US in the first three quarters of 2013 was US$289.03 million, up by 2.2% year on year. That helped the US to maintain its position as the top Viet Nam pangasius importer. However, sales to the market started to slow down in the third quarter as the US market became uncertain after the US Department of Commerce’s preliminary decision whereby two Vietnamese companies, Vinh Hoan Corp and

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**VIETNAM PANGASIUS EXPORTS TO MARKETS, JAN-SEP 2013 (US$ mil)**

<table>
<thead>
<tr>
<th>Markets</th>
<th>QI/2013</th>
<th>QII/2013</th>
<th>QIII/2013</th>
<th>Variation (%)</th>
<th>Jan-Sep 2013</th>
<th>Variation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>95.399</td>
<td>96.080</td>
<td>93.384</td>
<td>-5.1</td>
<td>284.863</td>
<td>-11.2</td>
</tr>
<tr>
<td>Spain</td>
<td>21.500</td>
<td>18.324</td>
<td>16.882</td>
<td>-13.6</td>
<td>56.706</td>
<td>-16.6</td>
</tr>
<tr>
<td>Germany</td>
<td>12.879</td>
<td>10.084</td>
<td>10.096</td>
<td>-21.2</td>
<td>33.058</td>
<td>-18.3</td>
</tr>
<tr>
<td>The U.K</td>
<td>7.765</td>
<td>11.659</td>
<td>11.060</td>
<td>+19.3</td>
<td>30.483</td>
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</tr>
<tr>
<td>ASEAN</td>
<td>29.594</td>
<td>33.092</td>
<td>28.639</td>
<td>+1.4</td>
<td>91.325</td>
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<tr>
<td>Singapore</td>
<td>8.822</td>
<td>8.764</td>
<td>8.961</td>
<td>-6.2</td>
<td>26.547</td>
<td>-1.7</td>
</tr>
<tr>
<td>Thailand</td>
<td>8.003</td>
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<td>8.263</td>
<td>+37.0</td>
<td>26.166</td>
<td>+71.0</td>
</tr>
<tr>
<td>The Philippines</td>
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<td>7.313</td>
<td>4.810</td>
<td>-25.3</td>
<td>19.133</td>
<td>-5.3</td>
</tr>
<tr>
<td>The U.S</td>
<td>72.498</td>
<td>130.265</td>
<td>86.275</td>
<td>-16.4</td>
<td>289.038</td>
<td>+2.2</td>
</tr>
<tr>
<td>China</td>
<td>17.683</td>
<td>22.534</td>
<td>25.221</td>
<td>+25.8</td>
<td>65.437</td>
<td>+23.1</td>
</tr>
<tr>
<td>Mexico</td>
<td>26.085</td>
<td>25.367</td>
<td>19.948</td>
<td>-8.5</td>
<td>71.401</td>
<td>+4.0</td>
</tr>
<tr>
<td>Brazil</td>
<td>24.519</td>
<td>27.203</td>
<td>27.740</td>
<td>+57.5</td>
<td>79.462</td>
<td>+69.9</td>
</tr>
<tr>
<td>Colombia</td>
<td>12.397</td>
<td>12.128</td>
<td>15.950</td>
<td>+19.8</td>
<td>40.475</td>
<td>+10.1</td>
</tr>
<tr>
<td>Saudia Arabia</td>
<td>11.875</td>
<td>15.833</td>
<td>8.964</td>
<td>-35.2</td>
<td>36.672</td>
<td>-8.0</td>
</tr>
<tr>
<td>Others</td>
<td>98.443</td>
<td>98.752</td>
<td>118.090</td>
<td>-3.0</td>
<td>315.284</td>
<td>-12.4</td>
</tr>
<tr>
<td>Total</td>
<td>388.493</td>
<td>461.255</td>
<td>424.210</td>
<td>-3.2</td>
<td>1,273.958</td>
<td>-1.4</td>
</tr>
</tbody>
</table>

Source: VASEP

**Export to the US**

The total value of pangasius exported to the US in the first three quarter of 2013 was US$289.03 million, up by 2.2% year on year. That helped the US to maintain its position as the top Viet Nam pangasius importer. However, sales to the market started to slow down in the third quarter as the US market became uncertain after the US Department of Commerce’s preliminary decision whereby two Vietnamese companies, Vinh Hoan Corp and
Hung Vuong Corp, were imposed an antidumping duty of US$0.42 per kilogram and US$2.15 per kilogram respectively. Furthermore, pangasius inventory in the US was at a high level.

**Export to the EU**

EU is the second biggest importer of Vietnam’s pangasius. The export value to the EU in the first three quarters was US$284.8 (down 11.2% year on year) which represented 22.4% of the country’s total pangasius exports. The EU market showed sign of recovery in September 2013 manifested in the slight rise in pangasius imported from Vietnam. It is expected that this trend will remain for the rest of 2013. The three main markets for Vietnamese pangasius within the EU are Spain, Germany and Netherland. While all these three main markets saw a decline in imported pangasius, the UK witnessed an average increase of 10% in the value of pangasius imported from Vietnam. During the period of January-September 2013, the UK imported pangasius from Vietnam at a value of US$30.483 million and Vietnam became the third largest supplier of pangasius frozen fillets (HS code HS0304).
VIETNAM PANGASiUS EXPORTS TO MARKETS THE EU, JAN - SEP (US$ mil)

<table>
<thead>
<tr>
<th>Markets</th>
<th>QI/2013</th>
<th>QII/2013</th>
<th>QIII/2013</th>
<th>Variation (%)</th>
<th>Jan- Sep 2013</th>
<th>Variation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>95.399</td>
<td>96.080</td>
<td>93.384</td>
<td>-5.1</td>
<td>284.863</td>
<td>-11.2</td>
</tr>
<tr>
<td>Spain</td>
<td>21.500</td>
<td>18.324</td>
<td>16.882</td>
<td>-13.6</td>
<td>56.706</td>
<td>-16.6</td>
</tr>
<tr>
<td>The Netherlands</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>12.879</td>
<td>10.084</td>
<td>10.096</td>
<td>-21.2</td>
<td>33.058</td>
<td>-18.3</td>
</tr>
<tr>
<td>The U.K</td>
<td>7.765</td>
<td>11.659</td>
<td>11.060</td>
<td>+19.3</td>
<td>30.483</td>
<td>+10.2</td>
</tr>
</tbody>
</table>

Source: VASEP

Export of other marine products

In the first three quarters of 2013, Vietnam marine product exports (including tuna) were worth US$1.6 billion, down 8.3% year on year. As of September 2013, marine product exports represented 30.5% total seafood exports.

Until now Vietnam mainly exports whole, frozen and fresh pangasius fillets (HS code 03), which represents 99.3 percent in value of the country’s total pangasius exports. Processed pangasius (HS code 16) only accounts for 0.7%. The value from exporting processed pangasius is increasing (by 4.5% year on year in September 2013) while that from exporting HS code 03 pangasius is going down (by 1.4% year on year in September 2013). This trend indicates the need for seafood companies to concentrate on developing more value-added products.

TOP 15 VIETNAM PANGASius EXPORTERS, JAN-SEP 2013

<table>
<thead>
<tr>
<th>No.</th>
<th>Companies</th>
<th>Value (US$)</th>
<th>No.</th>
<th>Companies</th>
<th>Value (US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vinh Hoan Corp</td>
<td>126,292,010</td>
<td>9</td>
<td>Dathaco</td>
<td>35,248,300</td>
</tr>
<tr>
<td>2</td>
<td>Agifish</td>
<td>84,890,256</td>
<td>10</td>
<td>HTFood</td>
<td>30,924,468</td>
</tr>
<tr>
<td>3</td>
<td>Hung Vuong Corp</td>
<td>63,492,490</td>
<td>11</td>
<td>CL-Fish Corp</td>
<td>30,717,135</td>
</tr>
<tr>
<td>4</td>
<td>Navico</td>
<td>60,156,407</td>
<td>12</td>
<td>South Vina</td>
<td>27,071,247</td>
</tr>
<tr>
<td>5</td>
<td>I.D.I Corp</td>
<td>50,832,098</td>
<td>13</td>
<td>Thimaco</td>
<td>26,880,796</td>
</tr>
<tr>
<td>6</td>
<td>Caseamex</td>
<td>45,022,085</td>
<td>14</td>
<td>Godaco</td>
<td>25,538,832</td>
</tr>
<tr>
<td>7</td>
<td>Hungca Co. Ltd</td>
<td>37,316,269</td>
<td>15</td>
<td>Biendong Seafood</td>
<td>25,424,367</td>
</tr>
<tr>
<td>8</td>
<td>Anvifish Co</td>
<td>36,699,494</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Tuna exports**

Apart from the two major products which are shrimps and pangasius, tuna also plays an important role in Viet Nam’s seafood export structure. However, the country’s value of tuna exports has not been stable in the last few years. In 2012 Viet Nam exported tuna to 96 different markets, making a total value of US$569 million. The three main import markets namely the US, EU and Japan represented 70% of the total export value. After a sharp increase of 50.1% in 2012, Viet Nam’s tuna export started to slow down in the first three quarters of 2013 by a 4.5% decrease due to the drop in exports to major markets such as the US and Japan, making a total value of US$415 million. Therefore, exporters had to expand to other markets, result in the increase in the number of importing markets from 96 to 103.

![Vietnam tuna exports, Jan - Sep 2013](image_url)

<table>
<thead>
<tr>
<th>Markets</th>
<th>QI/2013</th>
<th>QII/2013</th>
<th>QIII/2013</th>
<th>Variation (%)</th>
<th>Jan- Sep 2013</th>
<th>Variation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The U.S</td>
<td>56.946</td>
<td>51.674</td>
<td>38.501</td>
<td>-40.6</td>
<td>147.121</td>
<td>-23.9</td>
</tr>
<tr>
<td>EU</td>
<td>32.859</td>
<td>35.773</td>
<td>37.392</td>
<td>31.9</td>
<td>106.024</td>
<td>31.3</td>
</tr>
<tr>
<td>Germany</td>
<td>11.799</td>
<td>10.589</td>
<td>12.605</td>
<td>75.6</td>
<td>34.994</td>
<td>51.8</td>
</tr>
<tr>
<td>Italy</td>
<td>6.078</td>
<td>5.501</td>
<td>8.147</td>
<td>41.8</td>
<td>19.726</td>
<td>4.8</td>
</tr>
<tr>
<td>Spain</td>
<td>3.078</td>
<td>5.560</td>
<td>4.051</td>
<td>-1.5</td>
<td>12.689</td>
<td>17.8</td>
</tr>
<tr>
<td>Japan</td>
<td>22.598</td>
<td>8.981</td>
<td>5.261</td>
<td>-26.8</td>
<td>36.840</td>
<td>-19.8</td>
</tr>
<tr>
<td>ASEAN</td>
<td>9.486</td>
<td>8.395</td>
<td>11.435</td>
<td>-3.3</td>
<td>29.316</td>
<td>6.4</td>
</tr>
<tr>
<td>Israel</td>
<td>6.304</td>
<td>3.139</td>
<td>4.344</td>
<td>63.1</td>
<td>13.787</td>
<td>48.6</td>
</tr>
<tr>
<td>Tunisia</td>
<td>2.546</td>
<td>4.931</td>
<td>1.868</td>
<td>-28.6</td>
<td>9.344</td>
<td>32.6</td>
</tr>
<tr>
<td>Canada</td>
<td>4.380</td>
<td>2.652</td>
<td>1.792</td>
<td>3.1</td>
<td>8.824</td>
<td>2.8</td>
</tr>
<tr>
<td>Mexico</td>
<td>2.156</td>
<td>1.666</td>
<td>1.975</td>
<td>-17.0</td>
<td>5.797</td>
<td>11.3</td>
</tr>
<tr>
<td>Others</td>
<td>16.796</td>
<td>22.382</td>
<td>18.531</td>
<td>-30.8</td>
<td>57.710</td>
<td>1.9</td>
</tr>
<tr>
<td>Total</td>
<td>154.071</td>
<td>139.593</td>
<td>121.099</td>
<td>-18.3</td>
<td>414.763</td>
<td>-4.5</td>
</tr>
</tbody>
</table>

*Source: VASEP*
In terms of structure, the trend was that the export value of live, fresh, frozen, dried tuna and tuna loins (HS code 03) was going down while that of canned tuna (HS code 16) was on the increase. In the first three quarter of 2013, the total export value of tuna HS code 3 was US$ 230 million, down by 19.14% year on year and that of tuna HS code 16 was US$185 million, up by over 90%.

![Structure of Vietnam exported tuna products Jan - Sep 2013 (Value)](image)

<table>
<thead>
<tr>
<th>Products</th>
<th>Value (US$)</th>
<th>Proportion (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuna HS code 03 (1)</td>
<td>229,991,297</td>
<td>55.5</td>
</tr>
<tr>
<td>-Live/ fresh/ frozen/ dried tuna (HS code 03, excluding HS code 0304)</td>
<td>97,952,314</td>
<td></td>
</tr>
<tr>
<td>- Tuna (HS code 0304)</td>
<td>132,038,983</td>
<td></td>
</tr>
<tr>
<td>Processed tuna HS Code 16 (2)</td>
<td>184,771,473</td>
<td>44.5</td>
</tr>
<tr>
<td>Canned tuna (HS code 16)</td>
<td>147,742,504</td>
<td></td>
</tr>
<tr>
<td>Other processed tuna (HS code 16)</td>
<td>37,028,969</td>
<td></td>
</tr>
<tr>
<td>Total (1+2)</td>
<td>414,762,771</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: VASEP

III. REGULATIONS AND TARIFF

1. REGULATIONS

A. NEW FOOD SAFETY LAW AFFECTING FOOD EXPORTS INTO THE COUNTRY

According to the implementing Decree which has been promulgated and was effective from 11 June 2012, exports of certain food products are subject to registration and declaration of conformity with Vietnamese technical regulations, pre-registration of food producers before exports and new labelling rules. Please also note that there are 3 competent authorities dealing with different types of foods, i.e. Ministry of Health for health-type food products,
Ministry of Agriculture for agro-type food products, and Ministry of Industry and Trade for the rest. However, the Ministry of Health is the coordinating agency.

The English version is not yet available, however, please find below some highlights:

a) Declaration of conformity with Vietnamese technical regulations:

The following products are subject to the announcement of conformity with technical regulations and registration of conformity declaration with the Ministry of Health: Functional foods, food additives, processing aids, imported products being pre-packaged processed food products, food packaging tools, food packages and containers.

b) Food safety inspection for imported food products: it is required that competent authorities of exporting countries register food producers with Vietnamese competent authorities, and in necessary cases field inspections in exporting countries be carried out by Vietnamese authorities, before the products are permitted to be exported into Vietnam.

The Ministry of Health will approve the registration of producers of: food additives, processing aids, bottled drinking water, natural mineral water, functional foods, micronutrient-fortified foods, food packaging tools, food packages and containers belonging to those above categories.

The Ministry of Agriculture will approve registration of producers of: cereals, meat and products thereof, aquatic animals and products thereof, vegetables, tubers and fruits and products thereof, eggs and products thereof, fresh milk, honey and products thereof, genetically modified food, salt, seasonings, sugar, tea, coffee, cacao, pepper, cashew nuts and other farm products, food packaging tools, food packages and containers belonging to those above categories.

The Ministry of Industry and Trade will approve registration of producers of: liquor, beer, beverage, processed milk, vegetable oil, powder and starch processed products, confectionery products, food packing and containing tools and materials belonging to those above categories.

c) Labelling: it is required that the following description is reported on the label:

- “Expiry date” or “Use by” for: functional foods, supplementary foods, health protection foods, medical nutritious foods, micronutrient-fortified foods and perishable foods. After the mentioned date, these products are not allowed to be sold on the market.

“Best before” for other food products. After the mentioned date, these products are still allowed to be sold in the market as long as producers can prove products’ safety and labels must then be modified as either “Expiry date” or “Use by”. The period of safe use could be prolonged but not longer than the initial period.

Imported seafood packages must be labelled as per regulated in the Decree 89/2006/ND-CP, particularly Point 2 and 19 of the Article 12.


The Ministry of Health is to issue soon a circular regulating food labelling, as part of detail instruction for implementing Decree 38/2012/ND-CP.

B. **KEY REGULATIONS ON SEAFOOD EXPORTS TO VIETNAM**

1.1. **Registration of seafood exporters**

Seafood exporters to Vietnam are required to register at the National Agro-Forestry-Fisheries Quality Assurance (NAFIQAD) as per regulated in Circular 25/2010/TT-BNNPTNT (http://www.icex.es/icex/cma/contentTypes/common/records/mostrarDocumento/?doc=4427165).

Please read carefully the three annexes of Circular 25 which includes all details required for the registration procedure.

The registration document should be posted directly to the Fishery Quality Assurance Division under NAFIQAD at 10 Nguyen Cong Hoan Street, Ba Dinh District, Hanoi, Vietnam. NAFIQAD is supposed to give its official response within 30 working days after receiving the registration document.

1.2. **Registrations for each consignment**

Each consignment of exported products must be accompanied by a Health Certificate issued by Competent Authorities of the exporting country (unless fish and fishery products are caught by foreign fishing vessels, processed at sea and directly sold in Vietnam).

The importer(s) in Vietnam must register with the Department of Animal Health (DAH), Ministry of Agriculture and Rural Development, for quarantine for the coming consignment(s). Detail instructions for the quarantine procedure are in the Instruction 369/TY-KD (http://www.cucthuy.gov.vn/Pages/news_detail.aspx?NewsId=247). To complete this procedure, the importer will need an original Health Certificate of the exporting country for the consignment, at least 10 days before the consignment arrives at the port of entry in Vietnam.

1.3. **Standard documentation required when exporting seafood to Vietnam**

The table below lists standard UK generated export documents which are required for each consignment by Customs at the Vietnamese port of entry. The listed documents must be couriered or emailed to the importer(s) in Vietnam before or within 15 days after the consignment arrives Vietnam.

<table>
<thead>
<tr>
<th>Document</th>
<th>Original with Signature and Stamp</th>
<th>Copies</th>
<th>Prepare &amp; Issued By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Invoice</td>
<td>1</td>
<td></td>
<td>UK export company</td>
</tr>
<tr>
<td>Packing list</td>
<td>1</td>
<td></td>
<td>UK export company</td>
</tr>
<tr>
<td>Export Health Certificate</td>
<td>1</td>
<td></td>
<td>Local Authority in the UK</td>
</tr>
<tr>
<td>Buyer/Seller Agreement signed by both parties</td>
<td>1</td>
<td></td>
<td>UK export company</td>
</tr>
</tbody>
</table>
It is advisable to check in advance with the importer(s) the exact requirements for the specific Vietnamese port of entry that will be used for shipments. Companies should be aware that regulations in Vietnam can change and the interpretation thereof by individual officials may not be consistent across all entry ports.

2. **TARIFF**

Aquatic imports to Vietnam are subjected to Most Favoured Nation Rates. The current import rate from 0-25% is applied to unprocessed, unpacked agricultural products as well as processed and packaged food:

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
<th>MFN Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>0301</td>
<td>Live fish (except fish fry only 15%)</td>
<td>20%</td>
</tr>
<tr>
<td>0302</td>
<td>Fish, fresh or chilled, excluding fish fillets</td>
<td>10-20%</td>
</tr>
<tr>
<td>0303</td>
<td>Fish, frozen, excluding fish fillets</td>
<td>10-20%</td>
</tr>
<tr>
<td>0304</td>
<td>Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen</td>
<td>15%</td>
</tr>
<tr>
<td>0305</td>
<td>Fish, dried, salted or in brine, smoked fish, whether or not cooked before or during the smoking process; flours meals and pellets of fish</td>
<td>15-20%</td>
</tr>
<tr>
<td>0306</td>
<td>Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; crustaceans, in shell, cooked by steaming or boiling in water, whether or not chilled, frozen, dried, salted or in brine; flours, meals and pellets of crustaceans</td>
<td>0-20%</td>
</tr>
<tr>
<td>0307</td>
<td>Mollusk, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine, aquatic invertebrates other than crustaceans and molluscs, live, fresh, chilled, frozen, dried, salted or in brine; flours, meals and pellets of aquatic invertebrates other than crustaceans</td>
<td>0-25%</td>
</tr>
</tbody>
</table>

Tariffs for UK aquatic exports to Vietnam are subject to Most Favoured Nation rates. To receive these rates, a UK exporter must present a certificate of UK/EU origin during the customs clearance process.


Value – added tax is not applied to seafood imports.

**IV. PLANNING FOR THE INDUSTRY IN VIETNAM**

The seafood industry currently is faced with many difficulties and challenges. However, with the advantages and reputations which have been built during the past years, the long term growth potential of the industry is considered rather good. On 3 March 2011, the Prime
Minister issued Decision No.332/QD-Ttg which aims to develop long-term growth for the period of 2015-2020 for the Vietnam Fisheries as follow:

![Graph showing aquaculture production, export value, and jobs](image)

Especially, the aquaculture production to 2020 as follow:

<table>
<thead>
<tr>
<th>Products</th>
<th>Production (million tonnes)</th>
<th>Average growth rate/year to 2020 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pangasius</td>
<td>1.5 – 2.0</td>
<td>4.80</td>
</tr>
<tr>
<td>Shrimp</td>
<td>700,000</td>
<td>5.76</td>
</tr>
<tr>
<td>Mollusk</td>
<td>400,000</td>
<td>16.0</td>
</tr>
<tr>
<td>Marine fish</td>
<td>200,000</td>
<td>14.9</td>
</tr>
<tr>
<td>Tilapia</td>
<td>150,000</td>
<td>7.9</td>
</tr>
<tr>
<td>Seaweed</td>
<td>150,000</td>
<td>7.2</td>
</tr>
<tr>
<td>Prawn</td>
<td>60,000</td>
<td>11.6</td>
</tr>
</tbody>
</table>

The Vietnamese Government aims to guide the seafood sector to become a global-leading position as seafood exporter. This ambition has been set out in the fisheries development strategy plan to 2020. The following aspects of this plan are:

- The seafood industry will contribute from 30 to 35% of the agro-forestry sectors’ GDP, with a growth rate of 8-10% annually by 2020.
- Total fisheries output amounts to 6.5 to 7 million tonnes of which aquaculture production accounts from 65 to 70%.
- Target sets for developing the fisheries sector focuses on the four areas:
  a. Fishing and fisheries resources protection
  b. Aquaculture
  c. Seafood processing and trading
  d. Shipbuilding and fisheries logistic services.

V. BUSINESS OPPORTUNITIES FOR UK COMPANIES IN VIETNAM

1. Raw Materials for export processing
Though enjoying many favourable conditions for the development of catching and aquaculture activities, Viet Nam’s fishery industry still faces insufficient investment to develop to the fullest. Therefore, it is forecasted that in the near future, the supply of raw materials for export processing will continue to be unstable and inadequate. It is estimated that the total seafood output will only meet 86 percent of demand by 2015 and 83 percent by 2020. As a result, Vietnam will need to import about 620,000 tons of seafood per year by 2015 and 1 million tons by 2020.

2. Enhancing the quality of seafood products to access difficult importing market.

Vietnam’s seafood processing companies are aware of the need to raise their products’ quality in order to meet the high standards set by importing markets, especially the EU, UK included. This opens the door to opportunities in the two following areas:

- The need for consultancy services regarding process, standards and certification to help Vietnam’s seafood products access the UK market.
- The need for modern seafood processing technology.

3. Raw material for aqua feed manufacturing

The 130 aqua feed factories in Vietnam with total yield of 3.77 million tonnes can only meet 85.6% of the domestic demand. Though the percentage of imported aqua feed is gradually going down, Viet Nam is still dependant on foreign supply of raw materials for aqua feed. The percentage of imported raw materials is still over 50%.

VI. MAJOR PLAYERS IN THE INDUSTRY

1. LIST OF PRODUCERS/ MANUFACTURERS

1.1. CA MAU SEAFOOD PROCESSING AND SERVICE JOINT STOCK COMPANY (CASES)

Address: 4 Nguyen Cong Tru Street, Ward 8, Ca Mau City, Ca Mau Province
Tel: 84 780 383 5805
Fax: 84 780 383 0298
Email: sales@cases.com.vn/ salesmanager@cases.com.vn
Website: www.cases.com.vn

Contact: Mr Truong Hoang Kiet
Job title: Vice Director
Mobile: 84 (0) 913 933 143

Established in 1996. Ca Mau Seafood Processing & Service Joint Stock Corporation (Cases) specialises in processing and supplying a variety seafood products such as: Black Tiger, White, Pink, Cattiger (HOSO, HLSO, RPTO, CPTO, RPD, CPD, EZP, Nobashi...), Squid, Octopus (Whole cleaned baby octopus and Cut), Cuttlefish, Cut poul Squid and Surimi (Mix Surimi (GS: 100-200; 200-300; 300-500; 500-700; 700-900; 900-UP, Guchi Surimi (100%), Kintokidai Surimi (100%), Itoyori Surimi (100%), Basa Surimi and Eso Surimi), etc. The company capacity is 2,000-4,000 tons of finished products /month and the main export
market are includes Japan, USA, EU, Australia, Korea, Hong Kong, Singapore, China and Thailand.

1.2. MINH PHU SEAFOOD CORPORATION

Address: Industrial Zone, Ward 8, Ca Mau City, Vietnam
Tel: 84 780 3820 044
Fax: 84 780 3668 795
Email: minhphu@minhphu.com
Website: www.minhphu.com

HCMC Branch:

Address: 6th Floor, No.21 Le Quy Don Street, District 3, HCMC
Tel: 84 8 3930 9631
Fax: 84 8 3930 9624
Email: minhphu@hcm.vnn.vn
Website: www.minhphu.com

Contact 1: Mr Le Van Quang
Job title: Chairman and General Director

Contact 2: Ms Chu Thi Binh
Job title: Deputy General Director

Minh Phu Corp is the largest shrimp exporter in Vietnam. The company was established as a private enterprise in 1992 and then turned itself into a joint stock company in 2006. The company is listed on Vietnam’s stock exchange and has successfully formed a full circle process from producing feeding shrimps to biological products, commercial shrimps and processing for export. The company currently has 9 member companies including three seafood processing companies.

Minh Phu Corp has the largest shrimp farming area countrywide with a total of 900 hectares of industrial shrimp farm in the company’s ownership and 12,000 hectares of shrimp eco-farms in corporation with farmers. Minh Phu Corp has also got the highest processing capacity in Vietnam, of about 76,000 tonnes/ year. As of September 2013, the company successfully exported US$274,331,239 in value, up 5.72%. The company concentrates its shrimp export to two main markets, the US and Japan which accounts for 34% and 26% respectively.

1.3. QUOC VIET SEAPRODUCTS PROCESSING TRADING AND IMPORT – EXPORT CO. LTD

Address: 444 Ly Thuong Kiet St., Ward 6, Ca Mau City, Ca Mau Province
Tel: 84 7803 836 454/ 830 561
Fax: 84 7803 832021
Email: quocviet@quocvietseafood.com.vn
Website: www.quocviet.vn
Contact: Mr Ngo Van Nga
Job title: General Director

Contact: Mr Ngo Quoc Viet
Job title: Vice General Director
Email: quocviet@quocvietseafood.com.vn
Contact: Mr Ngo Quoc Tuan
Mr. Ngo Van Nga has been working in shrimp farming, processing and trading business in Vietnam for 35 years and founded Quoc Viet Co., Ltd in 1996 with his sons and daughter.

The family company has been one of the leading shrimp processors. Its export markets include US, Japan, EU, Australia, Canada, Korea and others.

Quoc Viet produces quality shrimp products that are from ethical and responsible practices and it uses the highest standards of quality control in a modern processing plant and farming system.

1.4. **NGOC SINH SEAFOODS**

Address: An Khanh Ward, U Minh District, Ca Mau Province  
Tel: 84 7803 831 006/ 864 337  
Fax: 84 7803 821 486/ 864 062  
Email: ngthanhcm@hcm.vnn.vn  
Website: www.ngocsinhseafoods.com.vn

1.5. **DONG NAM SEAFOOD CORPORATION**

Address: Lot 27, Tra Noc 1 Industrial Zone, Tra Noc, Binh Thuy, Can Tho Province  
Tel: 84 7103 844 666  
Fax: 84 7103 885 999  
Email: info@dongnamvn.com  
Website: www.dongnamvn.com

DongNam Seafood Corporation (DONGNAM) specialises in processing and trading high-quality shrimps, fish and frozen seafood products for export. Owning two processing plants, which apply HACCP regulations for quality management, which have been equipped with the most advanced technology and most modern processing lines as IQF lines, contact freezers, chilling rooms, mental detectors, laboratories, air blast, etc. Since its launch, DONGNAM has grown to be one of the leading seafood manufacturers and exporters in Vietnam. They now manufacture many kinds of products such as Shrimps, White River Cobbler, Barramundi and other seafood products which are exported to the US, EU, Australia, Japan and Korea markets.

1.6. **PHUONG DONG SEAFOOD COMPANY LIMITED**

Address: Lot 17D, Street 05, Tra Noc Industrial Zone, Can Tho City  
Can Tho Province  
Tel: 84 7103 841 707  
Fax: 84 7103 843 699  
Email: info@phuongdongseafood.com.vn  
Website: www.phuongdongseafood.com.vn

PhuongDong Seafood Co., Ltd. was established in 2001. The company specialises in processing, packing, trading and exporting frozen seafood products.
1.7. THUAN HUNG FISHERIES COMPANY LTD

Address: Lot 17D, Street 05, Tra Noc Industrial Zone, Can Tho City
Can Tho Province
Tel: 84 7103 911 624/ 911 888
Fax: 84 7103 911 623
Email: thuanhungct@hcm.vnn.vn/ thufico@vnn.vn
Website: www.thufico.com

Thuan Hung Fisheries Company Ltd (THUFICO) is private owned with more than 4 years experience in the seafood business. The company is one of the leading processor and exporter of fishery products in Vietnam, with annual exports of over 4,000 tons of fishery products per year.

Sanitation Standard Operating Procedures (SSOP), Good Manufacturing Practices (GMP), Hazard Analysis and Critical Control Point (HACCP) systems have been developed and implemented throughout all stages of production at Thuan Hung Fisheries' processing plants to ensure safe, wholesome and good quality fishery products supplied for human consumption.

The company products are sold in all major markets and are consistent in both quality and price. This is achieved through efficient processing systems, quality control procedures and product acquisition guidelines, combined with special management techniques designed by the company.

1.8. MEKONG GROUP

Address: 46 Residential Area No. 9, 30/4 Street, Xuan Khanh Ward
Ninh Kieu District, Can Tho Province
Tel: 84 7103 739 895/ 379 896
Fax: 84 7103 840 014
Email: info@mekong-group.com
Website: www.mekong-group.com

Contact: Ms Tran Diem Kieu
Job title: General Director

1.9. VINH HOAN CORPORATION

Address: National Road 30, Ward 11, Cao Lanh City, Dong Thap Province, Vietnam
Tel: 84 67 3891 166
Fax: 84 67 3891 062
Website: www.vinhhoan.com.vn

HCMC Branch

Address: 8th Floor, TKT Building, 569-571-573 Tran Hung Dao Street
Cau Kho Ward, District 1, HCMC
Tel: 84 8 3836 4849
Fax: 84 8 3836 5090
Email: vh@vinhhoan.com.vn
Website: vinhhoan.com.vn

Contact: Ms Truong Thi Le Khanh
Job title: Chairman and General Director
Established in 1997, Vinh Hoan Corp has continuously grown to become the largest pangasius processor and exporter in Vietnam with five subsidiaries creating a completed circle of process from breeding to farming and processing. The company owns the largest pangasius breeding farm in the country of 43.5 hectares which can meet 50% the company’s demand and a feed factory that can satisfy 100% of the company’s demand. Vinh Hoan Corp’s processing factory has the capacity of 500 tonnes of raw material/ day. The US and EU are the company’s two main export market which accounts for 49% and 28% respectively.

1.10. HUNG VUONG CORPORATION

Address: Lot 44, My Tho Industrial Park, Tien Giang Province
Tel: 84 73 3854 245
Fax: 84 733 854 248
Email: info@hungvuongpanga.com
Website: www.hungvuongpanga.com

Contact 1: Mr Duong Ngoc Minh,
Job title: Chairman cum General Director
Address: 144 Chau Van Liem, Ward 11, District 5, Ho Chi Minh City
Tel: 84 8 3853 6052
Fax: 84 8 3853 6051

Ho Chi Minh City Branch 1:

Address: Resco Building, 94-96 Nguyen Du Street, District 1, Ho Chi Minh City
Tel: 84 8 3914 2668
Fax: 84 8 3914 2668

Hung Vuong Corporation is also among the top pangasius exporters. The company was incorporated in 2003 and soon took a leading position in the country’s seafood industry with eleven subsidiaries. The company has currently got a total farming area of 345 hectares with the average annual production of 78,300 tonnes. The company can provide 70% of its needed raw material to its processing subsidiary. Hung Vuong Corp. also owns two subsidiaries specializing in manufacturing fishery feed. These two subsidiaries can supply 1,700 tonnes of fishery feed/ day which not only meet 100% of the demand of the company’s farm but can also sell part of the volume to the market. Over the years, Hung Vuong Corp has developed a good number of export markets stretching from the US, EU, Eastern Europe to South America and Asia Pacific. The company’s exports to its three main markets US, Russia, and Spain account for 19%, 16% and 15% respectively in its export structure. The company’s export value as of September 2013 was US$63.5 million.

1.11. SOC TRANG SEAFOOD JOINT STOCK COMPANY (STAPIMEX)

Address: 220 National Road 1A, Soc Trang City, Soc Trang Province
Tel: 84 793 822 164
Fax: 84 793 821 801
Email: stapimex@hcm.vnn.vn
Website: www.stapimex.com

Contact: Mr Tran Van Pham
Job title: President and General Director
2. **LIST OF RELEVANT INSTITUTIONS/ ORGANISATIONS**

2.1 **DIRECTORATE OF FISHERIES VIETNAM**

Address: 10 Nguyen Cong Hoan Street, Ba Dinh District, Hanoi, Vietnam
Tel: 84 4 6680 5011
Fax: 84 4 3724 5411
Email: ttam.bts@hn.vnn.vn
Website: www.fistenet.gov.vn

Contact: Mr Duong Long Tri
Job title: Director of Fisheries Information Center
Email: ttam.bts@hn.vnn.vn

2.2 **NATIONAL FISHERIES QUALITY ASSURANCE AND VETERINARY DIRECTORATE (NAFIQAVED)**

Address: 10 Nguyen Cong Hoan Street, Ba Dinh District, Hanoi, Vietnam
Tel: 84 4 3831 0983
Fax: 84 4 3831 7221
Email: Nafiqacen@hn.vnn.vn

Contact: Mr Tran Van Vy
Job title: Senior Adviser

2.3 **FISHERIES PROGRAMME SUPPORT (FSPS)**

Address: 10 Nguyen Cong Hoan Street, Ba Dinh District, Hanoi, Vietnam
Tel: 84 4 3771 7001
Fax: 84 4 3771 6522
Email: vannt.stofa@fsps.com.vn

2.4 **VIETNAM ASSOCIATION OF SEAFOOD EXPORTERS PRODUCERS (VASEP)**

Address: 10 Nguyen Cong Hoan Street, Ba Dinh District, Hanoi, Vietnam
Tel: 84 4 3835 4496
Fax: 84 4 3771 9015

Contact: Mr Nguyen Hoai Nam
Job title: Deputy General Secretary
Email: namnh@vasep.com.vn
Mobile: 84 (0) 983 609 228

2.5 **RESEARCH INSTITUTE OF AQUACULTURE NO.1 (RIA1)**

Address: Dinh Bang, Tu Son, Bac Ninh, Vietnam
Tel: 84 4 3827 3069
Fax: 84 4 3827 307
Email: vanphong@ria1.org; ria1@hn.vnn.vn; qlkh@ria1.org

Contact: Ms Phan Thi Van
Job title: Director

2.6 **RESEARCH INSTITUTE OF AQUACULTURE NO.2 (RIA2)**
Address: 116 Nguyen Dinh Chieu Street, District 1, Ho Chi Minh City
Tel: 84 8 3829 9592
Fax: 84 8 3822 6807

Contact: Mr Nguyen Van Hao
Job title: Director
Email: haoria2@hcm.vnn.vn

Contact: Mr Nguyen Van Trong
Job title: Vice Director
Mobile: 84 (0) 909 374 716

2.7 RESEARCH INSTITUTE OF AQUACULTURE NO.3 (RIA3)

Address: 33 Dang Tat, Nha Trang, Khanh Hoa Province
Tel: 84 583 831 138
Fax: 84 583 831 846

2.8 VIETNAM ACADEM OF SCIENCE AND TECHNOLOGY INSTITUTE OF OCEANOGRAPHY

Address: 1 Cau Da, Nha Trang, Khanh Hoa Province
Tel: 84 583 590 036
Fax: 84 583 590 034
Email: haiduong@dng.vnn.vn
Website: www.vnio.org.vn

Contact: Mr Vo Si Tuan
Job title: Director

3. LIST OF RETAILERS

3.1 ANNAM GROUP

Address: 6th Floor, 16-18 Hai Ba Trung Street, District 1, Ho Chi Minh City
Tel: 84 8 3822 9332
Fax: 84 8 3822 9391
Website: www.annam-gourmet.com

Contact: Mr Cedric Bailliez
Job title: Director – Annam Gourmet
Email: cedric.bailliez@annam-gourmet.com
Mobile: 84 (0) 902 512 283

3.2 AN PHONG INVESTMENT CORPORATION – MAXIMART SUPERMARKET

Address: No.3, 3/2 Street, District 10, Ho Chi Minh City
Tel: 84 8 3834 2002/ 3832 5324
Fax: 84 8 3835 6617
Email: anphong@maximark.com.vn
Website: www.maximart.com.vn

Contact: Ms Nguyen Anh Hong
Job title: General Director
Email: nguyenanhong@maximark.com.vn
Mobile: 84 (0) 913 914 078

An Phong was founded in 1992 and specialised in consumer goods business, sporting equipment and travel services. However, the company realised the economic growth and the change of shopping trends from local people so, in 1995, they decided to establish a supermarket model named MAXIMART. The first store launched in 1996 with a space of up to 5,000qm. It attracted many customers as well as partners to work with. In 1998, they opened one core store with the space of 2,000qm in Nha Trang province. In 2001 they expanded their first store to 17,000qm. Currently An Phong own 6 stores in total from Nha Trang to Can Tho province from 2,000qm to 25,000qm.

3.3 BIG C

Address: No 1231 No. 1A National Highway
         Binh Tri Dong B, Binh Tan District, Ho Chi Minh City
Tel:     84 8 3756 2300
Website: www.bigc.vn

Contact: Mr Laurent Zecri
Job title: General Director

3.4 DONG HUNG COMPANY LTD – CITIMART SUPERMARKET

Address: 230 Nguyen Trai Street, District 1, Ho Chi Minh City
Tel: 84 8 3925 6768
Fax: 84 8 3925 6788
Email: dong.hung@citimart.vn
Website: www.citimart.com.vn

Contact: Mr Lam Minh Huy
Job title: General Director
Email: huylam@citimart.vn
Mobile: 84 (0) 903 901 968

Dong Hung was established in May 1995 and specialises in retail trading for supermarkets and department stores. Their own brand name is CITIMART which includes 30 supermarkets from 200m$^2$ to 15,000m$^2$ at locations in Hanoi, Ho Chi Minh City, Nha Trang, Binh Duong and Kien Giang province.

3.5 GIANT

Address: 2/F Phuong Long Building, 506 Nguyen Dinh Chieu Street,
         Ward 4, District 3, Ho Chi Minh City
Tel: 84 8 3832 8272
Fax: 84 8 3832 8448
Website: www.giant.com.vn

Contact: Mr Stephane Deutsch
Job title: Chief Executive Officer
Email: Stephane_deutsch@giant.com.vn

3.6 LOTTE MART VIETNAM

Address: 469 Nguyen Huu Tho Street
3.7 METRO CASH & CARRY VIETNAM

Address: An Khanh An Phu, District 2, Ho Chi Minh City
Tel: 84 8 3519 0390
Fax: 84 8 3519 0370
Website: www.metro.com.vn

Contact: Ms Pham Thi Hong Diep
Job title: PA to Office Director
Email: diep.pham-thi-hong@metro.com.vn

3.8 SAIGON CO.OP

Address: 199-205 Nguyen Thai Hoc Street, Pham Ngu Lao Ward, District 1
Tel: 84 8 3836 0143
Fax: 84 8 3837 0560
Website: www.saigonco-op.com.vn

Contact: Mrs Nguyen Thi Hanh
Job title: General Director
ANNEX A:

VIETNAM ECONOMIC OVERVIEW FOR 2013


All data refer to latest available year (usually 2012).

<table>
<thead>
<tr>
<th>Economic Overview</th>
<th>Vietnam</th>
</tr>
</thead>
</table>

**Nominal GDP ($US bn)**: 155.5
**Real annual GDP growth (%)**: 5.1
**GDP per capita ($US)**: 1,753
**Annual inflation rate (%)**: 9.1
**Unemployment rate (%)**: 4.5
**Fiscal balance (% of GDP)**: -4.1
**Current account balance (% of GDP)**: 5.8

**GDP growth (annual %)**

**Inflation (annual %)**

**Fiscal balance (% of GDP)**

**Current account balance (% of GDP)**

**Human Development Index**

1 = highly developed, 8 = underdeveloped

**GDP per capita ($US)**

World Bank Ease of Doing Business ranking (best 1, worst 185)

Morocco: 97
Kosovo: 98
Vietnam: 99
Grenada: 100

Nepal: 101

Compiled by the FCO Economics Unit using data from external sources. Contact James Sloan on FTF (1) 8008 6181 for more information about this factsheet.
ANNEX B:

DOING BUSINESS IN VIETNAM: SOME TIPS

DOING BUSINESS IN THE SOCIALIST REPUBLIC OF VIETNAM

Planning Your Trip

✓ Visas are required. Check with the nearest Vietnamese Embassy. Visas can be arranged on line or through travel agents in Vietnam.
✓ Vietnam is +6 hours ahead of British Summer Time (BST) and +7hrs ahead of Greenwich Mean Time (GMT).
✓ Currently there are no direct flights to Vietnam. Visitors have to transit via regional hubs such as Hong Kong, Singapore or Bangkok. Direct flights from London Gatwick will commence in December.
✓ Domestic flight between Hanoi (North) and Ho Chi Minh City (South) takes around 1 hour and 40 minutes. (distance: 1,650 km)
✓ Use official metered taxis outside airports and around towns. Be sure that the meter is on.
✓ Try to avoid Vietnamese New Year (Tet), which usually falls in between January and February. Officially, Tet lasts for 4 days, but businesses and government departments tend to close for longer, often up to two weeks.

Business Environment

✓ Hanoi is the capital of Vietnam. Hanoi is where the ultimate decision may be made on your business proposal (this is especially true for large projects or those involved in Aid funded work).
✓ Central government decisions are made by consensus but the Party has the final word.
✓ Ho Chi Minh City (former Saigon) is the commercial hub, where many businesses have their largest presence in Vietnam.
✓ Individual People’s Committees are represented in each of the 64 Provinces in Vietnam. Although ultimately controlled by the central government, People’s Committees are important decision-makers and have strong powers to influence the success of your business.

General Business Tips

✓ Use a business card. Present it with both hands.
✓ Greet your Vietnamese interlocutor by name - make an effort to pronounce the name correctly (e.g. Mr Nguyen Nam Thuy would be Mr Thuy, Nguyen is the family name).
✓ Make contact at an early stage with the decision-makers at all levels of the bureaucracy (central government, provincial/city, local and with industry).
✓ Seek assistance from the Vietnamese Chamber of Commerce and Industry and other governmental organisations working to build business in Vietnam. These organisations have influence and a wide range of contacts.
✓ Build relationships first. Business will not happen without them.
✓ If you are planning to set-up in Vietnam, consult a lawyer about the possible options and how you plan to conduct business here. There are limits to what types of business entities such as "Representative" offices can do.
✓ At a working level the bureaucracy can sometimes be frustrating, pedantic and even seemingly obstructive. Patience and perseverance are key personal
attributes. Things do not work at the same pace as in the West. Avoid getting frustrated;
✓ Do not engage in corrupt practices.

Business Meeting Practices

✓ Meetings are the Vietnamese preferred way of doing business. Few businesspeople would do business without meeting with their business partner in person. Face to face discussions are important. Vietnamese are less dependent on emails compared to their western counterparts.
✓ It is not common for Vietnamese officials or businesspeople to commit to an appointment well in advance of time. High ranking officials may only commit to a meeting only one or two days beforehand.
✓ Allow plenty of time for meetings as they inevitably run over.
✓ Be punctual.
✓ Spend time on introductions and small talk, especially on topics such as family and sport (The English Premiership). This will help your Vietnamese counterpart to relax and increase their confidence in you.
✓ Shirt and tie is acceptable business wear for “everyday” meetings. You may wish to wear a jacket for more formal events;
✓ Women tend to wear formal business attire, which covers the shoulders.
✓ People are expected to sit in hierarchical order. Vietnamese expect the head of the delegation to enter into the room first.
✓ Use an interpreter at meetings. Follow-up immediately any agreement you may have been reached, in writing. Yes, may not mean “yes”. It may mean “yes, I understand what you are saying”.

Culture and Communication

✓ Emphasise mutual co-operation (technology transfer/training) and mutual benefit. Avoid suspicion of motive;
✓ Socialise without being lavish;
✓ Avoid conflict (loss of face), retain a sense of humour; be sensitive to any reactions;
✓ Explain everything clearly, over and over again, if necessary.

Money Tips (see annex on Getting Paid in Vietnam)

✓ The Vietnamese Dong (VND) is not convertible and there are controls on foreign exchange transactions. Foreign Invested Enterprises need to obtain Convertibility Rights from the State Bank of Vietnam to buy foreign currency;
✓ Remittance of foreign currency outside of Vietnam is only allowed for certain “proper” purposes such as payment of goods and services (subject to the importer having an import licence and submission of other documentary evidence of the import, e.g. purchase contract, customs clearance documentation etc). Remittance of dividends is subject to Tax Authority clearance;
✓ Letters of Credit are a common method of payment when exporting to Vietnam. Foreign exporters should have a Letter of Credit opened by a foreign bank with a branch in Vietnam;
✓ Seek legal/banking advice if you are not sure.
ANNEX C:

USEFUL CONTACTS

UK TRADE & INVESTMENT SECTION (VIETNAM)
Website: www.gov.uk/world/vietnam
Email: UKTIVietnam@fco.gov.uk

British Embassy, Hanoi
Address: 4/F, Central Building
31 Hai Ba Trung Street
Hanoi
Tel: 84 4 3936 0500
Fax: 84 4 3936 0561

British Consulate General, Ho Chi Minh City
Address: 25 Le Duan, District 1
Ho Chi Minh
Tel: 84 8 3825 1380
Fax: 84 8 3822 1971

UK TRADE & INVESTMENT, LONDON
Website: www.ukti.gov.uk

Address: 1 Victoria Street
London SW1H 0ET
United Kingdom
Tel: 44 (0) 207 215 8000

BRITISH BUSINESS GROUP VIETNAM (BBGV)
Website: www.bbgv.org

Hanoi Chapter
Address: 193 Ba Trieu, Hai Ba Trung District
Hanoi
Tel: 84 4 6674 0945
Email: bbgvhn@bbgv.org

HCMC Chapter
Address: G/F, 25 Le Duan, District 1
Ho Chi Minh City
Tel: 84 8 3829 8430
Fax: 84 8 3822 5172
Email: execdirector@bbgv.org

EUROPEAN UNION
DELEGATION OF THE EUROPEAN COMMISSION TO VIETNAM (HANOI)
Website: http://eeas.europa.eu/delegations/vietnam/index_en.htm

Address: 17-18/F, Pacific Place, 83B Ly Thuong Kiet Street
Hanoi
Tel: 84 4 3941 0099
Fax: 84 4 3946 1701
E-mail: delegation-vietnam@eeas.europa.eu
EUROPEAN CHAMBER OF COMMERCE (EUROCHAM)
Website:  www.eurochamvn.org

EUROCHAM Hanoi
Address:  Sofitel Plaza, 1 Thanh Nien Road, Ba Dinh District
          Hanoi
Tel:  84 4 3715 2228
Fax:  84 4 3715 2218
Email:  info-hn@eurochamvn.org

EUROCHAM Ho Chi Minh City
Address:  Euro Centre, 5/F, 49 Mac Dinh Chi Street
          DaKao Ward, District 1
          Ho Chi Minh City
Tel:  84 8 3827 2715
Fax:  84 8 3827 2743
E-mail:  info-hcm@eurochamvn.org

EuroCham HCMC is considering relocation the office next April 2014

COMMERCIAL SECTION
VIETNAMESE EMBASSY, LONDON
Website:  www.vietnamembassy.org.uk/tradesection.html

Address:  29 Chepstow Place
          London W2 4TT
Tel:  44 (0) 207 727 0883
Fax:  44 (0) 207 243 0471
Email:  uk@mot.gov.vn

INTERNATIONAL RELATIONS DEPARTMENT
VIETNAM CHAMBER OF COMMERCE & INDUSTRY (VCCI)
Website:  www.vcci.com.vn

VCCI Hanoi Head Office
Address:  9 Dao Duy Anh Street
          Hanoi
Tel:  84 4 3574 2022
Fax:  84 4 3574 2020
Email:  vcci@fmail.vnn.vn

VCCI Ho Chi Minh City Office
Address:  171 Vo Thi Sau Street, District 3,
          Ho Chi Minh City
Tel:  84 8 3932 7301
Fax:  84 8 3932 5472
Email:  vcci-hcm@hcm.vnn.vn

VIETNAM TRADE PROMOTION AGENCY (VIETRADE)
Website:  www.viettrade.gov.vn

VIETRADE Hanoi Head Office
Address:  Ministry of Trade
20 Ly Thuong Kiet Street, Hanoi
Tel: 84 4 3934 7628
Fax: 84 4 3934 4260
Email: viettrade@viettrade.gov.vn or qhqt@viettrade.gov.vn

VIETRADE Ho Chi Minh City Office
Address: 8 Nam Ky Khoi Nghia Street, District 1
         Ho Chi Minh City
Tel: 84 8 3829 7282
Fax: 84 8 3914 0549
Email: hcmviettrade@viettrade.gov.vn

INVESTMENT & TRADE PROMOTION CENTRE (ITPC)
Address: 51 Dinh Tien Hoang Street, District 1
         Ho Chi Minh City
Tel: 84 8 3910 1302
Fax: 84 8 3824 2391
Email: itpcinfodept@hcm.vnn.vn or itpc@hcm.vnn.vn
Website: www.itpc.hochiminhcity.gov.vn

MINISTRY OF PLANNING & INVESTMENT (MPI)
Website: www.mpi.gov.vn

MPI Hanoi Head Office
Address: 6B Hoang Dieu Street, Ba Dinh District
         Hanoi
Tel: 84 4 3845 5298
Fax: 84 4 3823 4453

MPI Ho Chi Minh City Office
Address: 178 Nguyen Dinh Chieu Street, District 3
         Ho Chi Minh City
Tel: 84 8 3930 6671
Fax: 84 8 3930 5413

DEPARTMENT OF PLANNING AND INVESTMENT OF HO CHI
Address: 32 Le Thanh Ton Street, District 1
         Ho Chi Minh City
Tel: 84 8 3827 2192
Fax: 84 8 3829 5008
E-mail: ipdpi@hcm.vnn.vn
Website: www.dpi.hochiminhcity.gov.vn
ANNEX D:

LIST OF SOME LAW, CONSULTANCY FIRMS and BRITISH BANKS IN VIETNAM

INTERNATIONAL LAW FIRMS

1. BAKER & MCKENZIE
Website: www.bakernet.com
Address: Unit 1301, 13/F Vietcombank Tower, 198 Tran Quang Khai Street
City: Hanoi
Tel: 84 4 3825 1428-9
Fax: 84 4 3825 1432
Contact: Frederick Burke, Managing Partner, Hanoi
Address: 12/F, Saigon Tower, 29 Le Duan Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3829 5585
Fax: 84 8 3829 5618
Email: fred.burke@bakernet.com
Contact: Fred Burke, Managing Partner, Ho Chi Minh City

2. FRASERS LAW COMPANY (formerly Freehills)
Website: www.frasersvn.com
Address: Unit 1205, 12/F, Pacific Place, 83B Ly Thuong Kiet Street
City: Hanoi
Tel: 84 4 3946 1203
Fax: 84 4 3946 1214
E-mail: info@frasersvn.com
Address: Unit 1501, 15/F, The Metropolitan, 235 Dong Khoi Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3824 2733
Fax: 84 8 3824 2736
E-mail: mark.fraser@fraservn.com
Contact: Mark Fraser, CEO/ Managing Partner

3. FRESHFIELDS BRUCKHAUS DERINGER
Website: www.freshfields.com
Address: #05-01, International Centre, 17 Ngo Quyen Street, Hoan Kiem
City: Hanoi
Tel: 84 4 3824 7422
Fax: 84 4 3826 8300
Email: hanoibranch@freshfields.com
Contact: Mr Tony Foster, Country Partner
Email: tony.foster@freshfields.com
Address: Unit 1108, 11/F, Saigon Tower, 29 Le Duan Street, District 1
City: Ho Chi Minh City
4. MAYER BROWN JSM (formerly Johnson Stokes & Master)
Website: www.mayerbrown.com
Address: 12/F, Pacific Place, 83B Ly Thuong Kiet Street
City: Hanoi
Tel: 84 4 3825 9775-8
Fax: 84 4 3825 9776
Email: hanoi.office@mayerbrownjsm.com
Contact: Mr Nguyen Hoang Anh, Partner/Director, Hanoi Branch
Email: HoangAnh.Nguyen@mayerbrownjsm.com

Address: 17/F, Saigon Tower, 29 Le Duan Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3822 8860
Fax: 84 8 3822 8864
Email: jsmsgn@hcm.vnn.vn
Contact: Ms John Marsden, Managing Partner
Email: john.marsden@mayerbrownjsm.com

5. LOVELLS
Website: www lovells.com
Address: 10/F, OSIC Building, 8 Nguyen Hue Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3829 5100
Fax: 84 8 3829 5101
Contact: Mr Gregory Buhyoff, Of Counsel Vietnam
Email: gregory.buhyoff@lovells.com

6. ALLENS ARTHUR ROBINSON (formerly Philips Fox)
Website: http://www philipsfox.com/www.arr.com.au
Address: Suite 401, 4/F, Hanoi Tower, 49 Hai Ba Trung Street
City: Hanoi
Tel: 84 4 3936 0990
Fax: 84 4 3936 0984
Email: bill magennis@aar.com.au
Contact: Mr Bill Magennis, Partner

Address: Suite 605, 6/F, Saigon Tower, 29 Le Duan Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3822 1717
Fax: 84 8 3822 1818
Email: nigel russell@aar.com.au
Contact: Mr Nigel Gordon Russell, Partner
7. INVESTCONSULT GROUP
Website: www.investconsult.com.vn
Address: No. 26/41 Thai Ha Street, Dong Da District, Hanoi
Tel: 84 4 3537 3262-5
Fax: 84 4 3537 3283
Email: incom@hn.vnn.vn
Contact: Mr Nguyen Tran Bat, Chairman / General Director
Address: 15 Nguyen Thi Dieu Street, District 3, Ho Chi Minh City
Tel: 84 8 3930 4868
Fax: 84 8 3930 4871-2
Email: inco@hcm.vnn.vn
Contact: Mr Nguyen Tran Khanh, First Vice Chairman / First Deputy General Director

8. LEADCO Vietnam Legal Counsellors
Website: www.leadcolawyers.com
Address: Pacific Place, Suite 404, Pacific Place, 83B Ly Thuong Kiet Street
City: Hanoi
Tel: 84 4 3942 5633 / 34
Fax: 84 4 3942 5632
Email: leadco@hn.vnn.vn
Contact: Mr Phan Nguyen Toan, Managing Partner
Email: pntoanleadco@hn.vnn.vn

9. VILAF
Website: www.vilaf.com
Address: Suite 603, HCO Building (Melia), 44B Ly Thuong Kiet Street
City: Hanoi
Tel: 84 4 3934 8528/29/30
Fax: 84 4 3934 8531
Email: phong@vilaf.com.vn
Contact: Mr Tran Tuan Phong, Hanoi Managing Partner
Address: Suite 404-406, Kumho Asiana Plaza, 39 Le Duan Blvd, District 1
City: Ho Chi Minh City
Tel: 84 8 3827 7300
Fax: 84 8 3827 7303
Email: duc@vilaf.com.vn
Contact: Mr Tran Anh Duc, Country Managing Partner

10. VISION & ASSOCIATES
Website: www.vision-associates.com
Address: Unit 308-310, 3/F, Hanoi Towers, 49 Hai Ba Trung Street
City: Hanoi
Tel: 84 4 3934 0629 / 824 1623
Fax: 84 4 3934 0631
Email: vision@vision-associates.com
Contact: Mr Pham Nghiem Xuan Bac, Managing Partner
Address: Unit 905, 9th Floor, CitiLight Tower, 45 Vo Thi Sau Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3823 6495
Fax: 84 8 3823 6496
Email: hcmvision@vision-associates.com

11. VIETBID
Website: www.vietbid.info
Address: Suite 436 Binh Minh Hotel, 27 Ly Thai To Street
City: Hanoi
Tel: 84 4 3934 4226
Fax: 84 4 3943 4225
Email: vietbid@hn.vnn.vn
Contact: Mr Nguyen Thanh Ha, Director

12. INVESTPRO
Website: www.investpro.com.vn
Address 2: 14th Floor, Green Park Building, 29 Nguyen Dinh Chieu Street
Hai Ba Trung Street, Hanoi
City: Hanoi
Tel: 84 4 3976 4136 / 38 / 39
Fax: 84 4 3976 4118
Email: headoffice@investpro.com.vn
Contact: Mr Nguyen Do Tung Cuong, Director

13. NHAN THANH JSC (INVESTMENT & TECHNOLOGY TRANSFER CONSULTANCY JOINT STOCK COMPANY)
Address: #104, 4B Lane, Ly Nam De Street, Hang Ma Ward, Hoan Kiem District
City: Hanoi
Tel: 84 4 2218 6455
Fax: 84 4 3734 3988
Email: nhanthanhjsc@vnn.vn
Contact: Mr Nguyen Tran Duy, Managing Director
Mobile: (84) (0) 913 381 900

14. DOAN HONG SON LAW OFFICE
Website: www.iprights.com
Address: Room 317, 3/F, VCCI Building, 9 Dao Duy Anh Street
City: Hanoi
Tel: 84 4 3577 0479
Fax: 84 4 3577 0480
Email: sdoan@iprights.com
Contact: Mr Doan Hong Son
Address: Rouse Legal, Level 5, Maison Pasteur, 180 Pasteur, District 1
15. YKVN LAWYERS
Website: www.ykvn-law.com

Address: Suite 401, International Centre, 17 Ngo Quyen Street
City: Hanoi
Tel: 84 4 3934 5410/1
Fax: 84 4 3934 5412
Email: hanoi.office@ykvn-law.com
Contact: Ms Diep Hoai Nam, Partner/Hanoi Office Manager

Address: Metropolitan Building, Suite 1502, 235 Dong Khoi Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3822 3155
Fax: 84 8 3823 6908
Email: hcmc.office@ykvn-law.com
Contact: Mr Truong Nhat Quang, Managing Partner

16. LDV LAWYERS - Ho Chi Minh City
Address: Bao Long Building, 7th Floor, 185 Dien Bien Phu Street, District 1
City: Ho Chi Minh City
Tel: 84 8 22402005
Email: ha.luu@ldvas.net
Website: www.ldvlawyers.com
Contact: Mr Luu Hoang Ha, Managing Partner
Mobile: (84) 903 906 768

17. LCT lawyers
Website: www.lctlawyers.com

Ho Chi Minh City
Address: Level 21, Bitexco Financial Tower, 2 Hai Trieu, District 1
City: Ho Chi Minh City
Tel: 84 8 3821 2357 – 3914 7050 – 3914 7051
Fax: 84 8 3821 2382
Email: net.le@lctlawyers.com
Contact: Dr Le Net, Partner

Hanoi
Address: 1403, Level 14, Vietcombank Tower, 198 Tran Quang Khai Street
City: Hanoi
Tel: 84 4 6278 2768
Fax: 84 4 6278 2766
Email: quang.chau@lctlawyers.com

LIST OF BRITISH BANKS

HONG KONG AND SHANGHAI BANK CORPORATION
Website: www.vn.hsbc.com
Hanoi Office
Address: Pacific Place, 83B Ly Thuong Kiet Street, Hoan Kiem District, Hanoi
Tel: 84 4 3933 3189
Fax: 84 4 3933 3198
E-mail: hsbcvnm@vn.hsbc.com

Ho Chi Minh City Office
Address: Metropolitan, 235 Dong Khoi Street, District 1, Ho Chi Minh City
Tel: 84 8 3829 2288
Fax: 84 8 3823 0530
E-mail: hsbcvnm@vn.hsbc.com

STANDARD CHARTERED BANK
Website: www.standardchartered.com

Hanoi Office
Address: Hanoi Towers, 49 Hai Ba Trung Street, Hanoi
Tel: 84 4 3936 8120
Fax: 84 4 3936 8300

Ho Chi Minh City Office
Address: Unit 2-01, 2nd Floor, Saigon Trade Center, 37 Ton Duc Thang Street, Ho Chi Minh City
Tel: 84 8 3910 6118
Fax: 84 8 3829 8426

LIST OF SOME INTERNATIONAL ACCOUNTANCY FIRMS IN VIETNAM

PRICEWATCHEROUSCOOPERS
Website: www.pwc.com

Hanoi
Address: Floor 16, Keangnam Hanoi Landmark Tower, 72 Cau Giay New Urban Area, Me Tri Commune, Tu Liem District, City: Hanoi, Vietnam
Tel: 84 4 3946 2246
Fax: 84 4 3946 0705

Ho Chi Minh City
Address: 4th floor, Saigon Tower Building, 29 Le Duan Street, District 1, City: Ho Chi Minh City
Tel: 84 8 3823 0796
Fax: 84 8 3825 1947

KPMG
Website: www.kpmg.com.vn
Hanoi
Address: 46th Floor, Keangnam Landmark Tower
72 Building, Plot E6, Pham Hung Street, Cau Giay District, Tu Liem
City: Hanoi
Tel: 84 43946 1600
Fax: 84 43946 1601
Email: kpmghanoi@kpmg.com.vn

Ho Chi Minh City
Address: 10th floor, Sunwah Tower Building
115 Nguyen Hue Street, District 1, Ho Chi Minh City
Tel: 84 8 3821 9266
Fax: 84 8 3821 9268
Email: kpmghcmc@kpmg.com.vn

ERNST & YOUNG
Website: www.ey.com/vn

Hanoi
Address: 15th floor, Deaha Business Centre
360 Kim Ma, Ba Dinh District
City: Hanoi
Tel: 84 43831 5100
Fax: 84 43831 5090
Email: eyhn@vn.ey.com

Ho Chi Minh City
Address: Bitexco Financial Tower
28th Floor, 2 Hai Trieu Street, District 1
City: Ho Chi Minh City
Tel: 84 8 3824 5252
Fax: 84 8 3824 5250
Email: eyhcmc@vn.ey.com

GRANT THORNTON
Website: www.gt.com.vn

Hanoi
Address: 8th floor, 39A Ngo Quyen Street
City: Hanoi
Tel: 84 4 2220 2600
Fax: 84 42220 6449
Email: info@gt.com.vn

Ho Chi Minh City
Address: 28th floor, Saigon Trade Centre,
37 Ton Duc Thang Street, District 1
City: Ho Chi Minh City
Tel: 84 8 39143747
Fax: 84 8 39143748
Email: info@gt.com.vn