Food Processing and Packaging Machinery

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Sector: **Food Processing/Packaging Equipment**

by: **Nguyen Huong**
approver: **Robert Bannerman**

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This report describes the market in Vietnam for Food Processing and Packaging Equipment.

1. SUMMARY

Vietnam has an agriculture-based economy with nearly 80 percent of its population engaged in agricultural activities that generate 30 percent of gross domestic product. The export of agricultural products including rice, coffee, tea, cashews, pepper and seafood account for 40 percent of the country's total export turnover. With the push to export more agricultural and aquatic products and the growth of the domestic packaged foods sector, the food processing, packaging, and preserving industry plays an ever more important role in the country's plans for economic growth.

The need to reduce post-harvest loss and to move up the value-added chain is driving the food industry in Vietnam to focus on food handling, food processing, packaging, and cold chain equipment. However, financing remains a problem. State-owned enterprises may rely on state budget allocations for capital equipment upgrades. A certain amount of Official Development Assistance (ODA) has also funded projects in this sector. However, private companies in Vietnam often find it difficult to access bank finance, and thus may have to rely on internal financing to import equipment.

2. MARKET OVERVIEW

The modern food processing and preserving sector is still a young industry in Vietnam, but constitutes a market with great potential for foreign companies. There are investment opportunities as well as opportunities to supply equipment. Statistics from the Ministry of Planning and Investment (MPI) show that in 2003, 111 new foreign-invested projects had been established in the food processing, including 20 projects invested in food processing, 17 projects in fisheries and 74 projects in agro-forest products.

At present, Vietnam has around 260 seafood processing plants, of which 200 are reserved for processing frozen products, with a combined annual capacity of 250,000 tons. There are 24 slaughter houses and meat processing facilities, all of which are state owned; 160 beverage manufacturers, 65 fruit and vegetable processing plants, 27 instant noodle producers and about 23 key manufacturers of confectioneries.

Although the demand for machinery and equipment in the industry is huge, the domestic machinery industry cannot satisfy the internal demand because (despite some skill in copying and reverse-engineering) it has proven poor in design and quality. For the most part, domestic equipment is used in small scale processing factories. Medium and larger food processing enterprises and even smaller firms producing high quality products must rely on imported machinery and equipment. The food processing sector is forecast to maintain an average annual growth rate of 10 – 15 percent for the near term.

Packaging accounts for around 8 - 10 percent of Vietnam’s GDP. Vietnam has 900 packaging producers of all sizes. Unfortunately, the increase in the number of manufacturers has not led to a significant improvement in packaging quality and design. This is recognized as a serious problem for Vietnam's economy as a whole. With packaging inferior to that used for foreign-made products, Vietnamese commodities find themselves less competitive internationally. Vietnam’s packaging production technology is in urgent need of upgrading and appropriate investment.

In addition to deficiencies in food processing and packaging, Vietnam must also upgrade facilities for the storage and transportation of fresh and processed food. Cold chain infrastructure is only beginning to emerge in Vietnam, but will play an increasingly important role in the development of the food and foodstuff industry, especially for export products. There are around 40 major companies, both foreign and domestic, in Vietnam that specialize in cold storage services.

3. MARKET TRENDS

In Vietnam, food products (processed, semi-processed, and fresh) may be divided into three broad categories based on competitiveness:

1. Internationally competitive products such as rice, seafood, processed pork, coffee, pepper, and cashew nuts. These are marketed both at home and abroad. Vietnam is the world's second largest rice exporter and the third largest coffee bean exporter, but poor post-harvest handling and lack of processing limit the value of these exports. For all products in this category, there is strong pressure to upgrade quality through improved handling and value-added processing prior to export.

2. Potentially competitive products include canned meat, vegetable oil, fruit and vegetable juice (canned, concentrated), fresh vegetables, refined sugar, instant noodles and tea. These are largely consumed domestically, but might be internationally competitive with increased investment in handling and processing technology.

3. Non-competitive. This segment is dominated by imports.

To prevent a flood of imported processed food and to increase the competitiveness of exports, the Government has pledged to focus investment on the competitive and the potentially competitive product groups and strengthen preferential policies to assist food-processing enterprises to improve their technological and managerial capabilities.

While it is inevitable that Vietnam will rely heavily on commodity, low-value-added food exports for at least the medium term, there is widespread recognition at the national, municipal, and enterprise levels of the need to improve handling and increase value added through processing. An overview of some key sectors follows.

- **Seafood/aquaculture products:**

Vietnam ships fish, shrimps, squid, frozen crabs, fish sauce and other processed fisheries products to nearly 60 countries around the world. Five major importers – the U.S, Japan, mainland China, Hong Kong, and the EU – account for 80 percent of the Vietnam's annual export turnover. Seafood products are now the country's fourth largest export earner after crude oil, garments and footwear. The Ministry of Fisheries plans to export up to US$2 billion by 2005 and US$2.7 – 3 billion by 2010. This sector has grown rapidly in recent years, especially farm-raised shrimp and fish.

Vietnam has around 260 seafood processing plants, of which 200 are reserved for processing frozen products. 170 of these plants are owned by either state or provincial governments. There are around 48 joint venture and wholly foreign-owned companies with a total investment capital of more than US$155 million engaging in seafood cultivation and processing for export.

Vietnam's processing plants export between 75 – 90 percent of their output. Most of the equipment has been imported from Taiwan, Norway, Bulgaria, Italy, and more recently, Japan. Most processors do not yet have the financial wherewithal to upgrade facilities to the point where they are producing value-added products. For now, the main value-added products sold for direct consumption are sashimi grade cuttle-fish and cooked and peeled shrimp. As a result, Vietnamese products are usually bought as raw materials and reprocessed into higher value added products once they are imported. 80 percent of the exported products are semi-finished, according to Ministry of Fisheries.

In 2003, the fisheries industry implemented 17 international cooperation projects supported by a fund of US$44 million financed by the World Food Agriculture Organization (FAO), DANIDA (Denmark), NORAD (Norway), ODA capital and JICA (Japan). These funds were invested in infrastructure, fisheries resources, processing and exporting fisheries and building the legal system. The largest invested projects are: building three fish markets in Hanoi, Ho Chi Minh City and Quang Ninh (US$15 million ODA-Japan), a training center for the farmers (US$9 million from JICA), and a study center for developing sea plantation (US$7.5 million from JICA).

The Ministry of Fisheries has issued a plan to spend US$200-300 million over the next five years to upgrade processing equipment at 70 percent of the nation's processing plants. Disbursement of these funds has been slow in forthcoming, however.

The government has approved a Ministry of Fisheries master plan from 2000 to 2010. The plan calls for spending nearly US$2.5 billion for major investment projects in such areas as aquaculture, processing, infrastructure and services. Funding will come from the state budget, ODA and other sources.

- **Fruits & vegetables processing:**

At present, most vegetables and fruits are delivered to market fresh for local consumption. Only a small percentage is processed for export, with produce going to about 40 overseas markets. Fruits and vegetables account for 15 to 20 percent of agricultural output, but account for only five percent of Vietnam's total agricultural export volume.

An average Vietnamese consumes about 65kg of vegetables and 55kg of fruits a year. This is well below the world average of 90kg annually per person for both vegetables and fruits. As disposable incomes grow in Vietnam, demand for vegetables and fruits are increasing by 3.6 percent a year, while output is rising by only 2.8 percent. While part of this gap can be closed by raising more produce, investment in post-harvest handling and cold chain technology is also important to get more of the current crop to market. The lack of refrigerated storage and transportation has resulted in nearly one-third of all the fruits and vegetables harvested in Vietnam rotting in non-refrigerated storage warehouses.

At present, only five to seven percent of fruit and vegetable output is processed every year (compared with 78 percent in Thailand). Low capacity facilities with outdated processing technology give rise to big losses of 20 percent of Vietnam’s fruits and 30 percent of its vegetables. What processing there is takes place at 65 plants and a myriad of household enterprises. To increase production of vegetables and fruits for both local consumption and export, the Ministry of Agriculture and Rural Development (MARD)’s Agriculture Policy Department has requested the government to give priority to the improvement of strains and to the purchase of modern freezing and processing facilities.

A 10-year project (2000-2010) to develop production methods for vegetables and fruits has been approved by government. Under this project, by 2010 the country will annually produce 23 million tons of vegetables and fruits, and will export about 1.8 million tons of processed vegetables and fruit products, and 2.0 million tons of fresh fruit by that time. The vegetables and fruits sector has focused efforts on diversifying plant varieties and transferring farming techniques from overseas. Upgrading existing processing factories and building new medium-size processing facilities have been accelerated with the aim of reducing post-harvest losses to below 15 percent. MARD has estimated it will take US$10 billion in new investment to develop 402 projects in agricultural product processing and preservation by 2010.

The Vietnam National Vegetable and Fruit Corporation (Vegetexco) is the largest state-owned enterprise in this sector. It owns 18 fruit and vegetable processing plants in Vietnam, including 11 canning factories. The total capacity of the plants is 50,000 tons per year. Vegetexco also operates refrigeration factories with a capacity of 20,000 tons per year.

- **Dairy products:**

Domestic consumption of dairy products is growing rapidly. Demand for milk products increased eight-fold between 1990 and 1997. Per capita consumption of dairy products now stands at 4.3 kilograms of milk per year.

Vietnam’s total annual dairy output as of May 2003 was at 420 million cans of condensed milk, 9,500 tons of powdered milk, 52 million liters of sterilized milk, 37.2 million liters of yogurt and two million liters of soybean milk.

Domestic dairy producers currently have a 6.9 percent share of the milk supply market. The government master plan for the dairy industry calls for this share to increase to 25 percent by 2010.

Raw materials for the dairy industry are almost all imported. The government imposes a relatively low tax on imported dairy products and on raw materials like powdered milk needed for dairy processing.

One of the most successful Vietnamese companies in this sector is the Vietnam Milk Corporation (Vinamilk) whose products hold between 70 to 80 percent of the market of all domestically produced milk products. Vinamilk has more than 2,000 sales agents and major shops across the country. Vinamilk’s production has averaged annual growth of 15 to 20 percent.

- **Meat processing:**

The meat industry is producing 1.6 million tons annually; 77 percent is pork, 18 percent poultry, and seven percent red meat. Under a master plan issued by the Ministry of Agriculture and Rural Development (MARD), four million tons of meat will need to be processed over the next ten years.

Two leading companies in the meat processing industry are the Vietnam Animal Industry Corporation (VISSAN) and Animex. VISSAN operates Ho Chi Minh City's largest meat processing plant, which accounts for 47 percent of all frozen meat produced for export. VISSAN is also a major supplier to the Ho Chi Minh City market. While output is high, the plant is old and much of the machinery is now being upgraded.

Animex owns slaughter houses, processing plants and refrigeration facilities in Ho Chi Minh City, Danang, and Haiphong. Animex' plants produce 16 percent of Vietnam's frozen meat exports. Animex' plant is one of the few plants in Vietnam that complies with international hygiene standards.

Cold storage facilities are usually based at the meat processing plants themselves. Vissan and Animex have upgraded facilities, but most of the plants still use outdated equipment in poor condition.

- **Fruit juice, soft drink, and beer:**

The fruit juice sector has attracted foreign investment, but most of these projects are small, low capacity projects. In recent years, domestic fruit juice makers have expanded market share. With more than 30 categories, including orange, guava, mango, apple, and litchi, their products have become more attractive both in terms of price and quality in the past few years. Domestic fruit juices now account for 70 – 80 percent of fruit juice products available in the market. Imported rival fruit juice products generally cost 20 percent more. In Ho Chi Minh City, average fruit juice consumption per month is 80,000 liters. For Hanoi, the figure stands at 10,000 liters.

Local soft drink makers have gradually lost their market share to foreign competitors. Pepsi has three factories located in Hanoi, Danang and Ho Chi Minh City. Pepsi brands include Pepsi, 7 Up, Mirinda, Everess, Aquafina, and Sting. Market observers estimate Pepsi's market share at around 50 percent. Coca Cola re-entered the market after the US embargo was lifted in 1994. In 2000, Coca-Cola was allowed to buy-out their local partners' shares and go it alone. Coca Cola now has invested in three plants in Vietnam. US$182 million in Coca Cola Vietnam in HCMC, US$151-million in Coca Cola Ngoc Hoi in Ha Tay Province and US$25-million in Coca Cola Non Nuoc in Danang City. Coca Cola plans to integrate the three companies into one to increase competitiveness. Coca Cola brands include Coca Cola, Sprite, Diet Coke, Fanta, and Samurai.

The beer market is characterized by growing demand and intense competition between six international brewers and local breweries. Overall, consumption levels are still low compared to the region and have increased annually throughout the decade. On average, Vietnamese drink eight liters of beer a year. Beer consumption is predicted to grow at seven percent this year.

Foreign investors re-entered the beer market in 1992. Today, leading brands produced and marketed locally include Tiger, Carlsberg, Heineken, Foster and San Miguel.

However, the market is still dominated by the 350-plus small- scale breweries, which hold 80 percent of the market. The two largest Vietnamese breweries are state-owned Saigon Beer Company and Hanoi Beer Company. Saigon Beer produces the popular 333 and Saigon brands. A number of Vietnamese breweries, including these two, have imported technology from Germany, Denmark and Holland.

4. COMPETITION

Numerous companies from Asia and Europe have entered the Vietnam market seeking business opportunities in the food processing/packaging and cold chain industry. In the food processing sector, Japanese, Taiwanese, Hong Kong, German, Danish and Indian firms are among the major competitors to U.S suppliers. Packaging equipment from Germany, Japan, Italy and Taiwan are considered the best sellers in Vietnam.

Players in the Vietnamese market may be classified into the four following groups:

Group 1: Local and joint venture firms

Local and joint venture companies have advantages over foreign suppliers thanks to their detailed understanding of the market and culture, strong relationships, and lower operating costs. However, due to poor quality assurance and lack of economies of scale, local manufacturers find it difficult to sell equipment to large projects. Sometimes equipment made locally even turns out to be more expensive than imported products.

The following are some of the major local food processing equipment manufacturers:

Quang Trung Mechanical Company, Hanoi Mechanical Company, Thu Duc Agricultural Engineering Company, Caric Company, Foodstuff Mechanical Company, Vinapro, and Hayen Industrial.

Refrigeration equipment/service companies:

Local companies:

- State-owned companies: Tan Binh Foodstuff Company, Vegetransco, Seaspimex, Searefrico, Agrex Saigon

- Private companies: Nguyen Phap Company, Trang Nguyen Service Company, Hung Tri Co., Ltd. Trading & Technical Services, Vee Refrigeration, An Lac Cold Storage.

- Joint stock: Ree (the market leader with a 50 percent market share in engineered refrigeration products)

Joint venture companies:

- Japan-Vietnam: Javitrans, Sagawa Express

- Russia-Vietnam: Vietnam Russia Fishery Joint Venture Company (Seaprimfico)

Group 2: European companies

This is the most active group in the market. Many of these firms have operated in Vietnam for a number of years and have established close relationships with local businesses and key authorities. The European players also offer favorable financing arrangements for the local customers.

Food processing equipment:

- Denmark: K.M. Fish Machinery A/S, Niro, Sasib Bakery.
- Germany: Steineker, Klockner Hansel, Buhler Gmbh.
- Sweden: Alfa Laval.

In refrigeration equipment/service:

- Italy: Thermokey, Technoblock, Refrigeration, Dixell.
- France: Lamberet Constructions Isothermes.

- Denmark: York Refrigeration.

Packaging equipment:

- Germany: Joint Rieckermann, Intergrafica Print & Pack.
- Sweden: Tetra Pak.

Group 3: Asian companies

Cheaper price is the competitive edge of many Asian companies in the Vietnamese market

Food processing equipment*:* Taiwan, Hong Kong, Japan, and Malaysia

In refrigeration equipment/service:

- Taiwan: T&C Tait Vietnam MWF Co., Ltd, Translink.
- Hong Kong: Swire Pacific Cold Storage (services).

Packaging equipment:

- Taiwan: Lian You, Tsai Yi, Hong Yona.
- China: Shanghai Sunshine.
- Japan: Vina Seiko.

Group 4: American companies

U.S companies are well known for their quality and modern technology, but few U.S. firms have entered the market since the U.S trade embargo was lifted in 1994. Thus, the current U.S market share is small. Most U.S companies have marketed their products in Vietnam via local distributors.

In refrigeration equipment/service:

Antara, Thermo King Vietserve, Carrier, Trane.

At present, U.S equipment/technology is not yet widely used in the food processing and packaging industry due to its late arrival in the Vietnamese market. Nevertheless, U.S products have a good reputation for reliable and high quality, strict adherence to international standards, advanced technology and technical expertise. However, price competition from Asian and used equipment suppliers is a competitive challenge for U.S. suppliers in this cost-conscious market.

The following factors may give suppliers a competitive advantage:

- Advanced technology appropriate to Vietnam’s economic and technological conditions.
- Flexible financing options for buyers.
- Close relationships with local businesses, especially large state-owned corporations and sector associations.
- Good after-sales service.
- Seminars, overseas trips and careful training for the customers’ managers

and staff.

5. END USERS

Potential end users of food processing, packaging equipment and cold chain are:

- Dairy manufacturers: An Phuoc Milking-Cow Enterprise, Vinamilk, Dutch Lady Vietnam, Tribeco.

- Seafood factories: Cafatex, Seaprodex, Angifish, Incomfish, Cofidec, East Sea Fisheries Corp.

- Fruit juice plants: Delta Juice Vietnam, Vegetexco Ho Chi Minh City, Sohafarm, Kiveco, CKL (Vietnam) Corp., Gannon Factory.

- Bakery factories: Bien Hoa Confectionery Corp. (Bibica), Duc Phat, Kidoco, Vinabico-Kotobuki, Haihaco.

- Coffee, tea: Vinacafe, Asian Coffee Company (ACC).

- Canned food factories: Vissan Import Export Corporation, Agrex Saigon, Ha Long Canned Food Co. (Canfoco), Tuyen Ky Co., Ltd. Cau Tre Export Processing Enterprise (C.T.E).

- Vegetable oil plants: Tuong An Cooking Oil, Nakydaco, Vocarimex.

- Instant noodle/snack manufacturers: Vietnam Food Industries Company (VIFON), An Thai Food Industries Joint Venture Co. Ltd, Colusa, Miliket Food and Foodstuff Enterprise, Saigon Ve Wong Joint Venture, Thien Huong Food Shareholding Co.

- Printing/Packaging manufacturers: Liksin Packaging Enterprise, Bien Hoa Packaging Factory, Crown Vinalimex (Ha Tay Province), Tien Bo Printing and Packaging Factory, A Chau Joint Stock Packaging Company, and Packsimex.

Demand for renovation of equipment and production technologies by state-owned enterprises is increasing because they are not only the major exporters, but also leaders in the domestic market. These enterprises typically rely on government budget allocations when they need to upgrade plant and equipment. In recent years, some fishery and fruit and vegetable enterprises have been able to finance capital expansion and upgrade with Official Development Assistance (ODA) funds. Private and joint venture companies have critical needs to purchase new equipment, but must generate the funds internally. Commercial bank financing is not generally available to them.

6. SALES PROSPECTS

Good sales prospects for U.S. equipment suppliers are as follows:

* **Food processing:**

- Processing equipment for seafood: frost coating machine, peeling & grading equipment, air blast freezer, contact freezer, pre-processing & pastry making equipment, glazing machine.

- Fruits & vegetables: grinding, small-sized fruit pressing and mixing machinery, slicing, juice extracting, juice concentration, centrifugation and superheated steam drying.

- Coffee, tea: coffee processing, instant coffee making & packaging lines, rubbing and dehydrating machines.

- Rice and wheat flour processing machinery.

- Processing equipment for meat: freezing, tumbling, grinding, cutting, pasteurizing, mixing, stuffing machine and equipment used in making canned and frozen foodstuffs

- Machinery for the preparation of vegetable oil, vegetables, cotton and dairy.
- Processing equipment for confectionery industry.

* **Packaging:**

- Vacuum packing machine, packaging machinery for fruit & vegetable juice processing.
- Small pack-packaging equipment.
- Alcoholic and non-alcoholic drink packaging machinery.
- Instant noodle and snack packaging equipment.
- High and medium capacity bottling and labeling equipment.

*** Cold chain equipment**

- Commercial cold storage facilities.
- Port projects.
- Retail supermarket and convenience store chains.
- State-owned enterprises and cooperatives in the seafood/aquaculture sector.

7. MARKET ACCESS

Major problems for U.S. companies entering the Vietnamese equipment market include import financing, as almost every Vietnamese buyer expects to have long-term payment and/or credit with a payback period of two to three years. U.S. equipment suppliers are recommended to follow a flexible, creative marketing strategy, which will inevitably require patience.

When dealing with importers or financing originating in Vietnam, U.S. suppliers should request irrevocable letters of credit (L/Cs). They should have one of their correspondent banks confirm the L/Cs. Foreign banks tend to deal with the four state-owned banks (Incombank, Vietcombank, Bank for Agriculture and Rural Development and Bank for Investment and Development of Vietnam) and three top-tier joint-stock banks (Asian Commercial Bank, Maritime Bank and Ex-Im Bank) for trade financing.

U.S suppliers of food processing, packaging, and cold chain equipment can now tap into U.S. Export-Import Bank (Ex-Im Bank) or the Overseas Private Insurance Corporation (OPIC) programs, which can help finance and insure large capital contracts. The Export-Import Bank (Ex-Im Bank) offers export financing of American products through loans and loan guarantees, as well as providing working capital guarantees and export credit insurance. The Overseas Private Investment Corporation encourages private American business investment in emerging economies by providing project financing and political risk insurance.

The Vietnamese government does not encourage the use of second-hand equipment in any industry. There have been exceptions, but only on a case-by-case basis.

Labeling is required for importation of certain food processing and packaging equipment. Accordingly, the importer must provide some information on the label, including (i) name of the equipment, (ii) name and address of traders responsible for the equipment (e.g., the importer), and (iii) instructions on using, operating and preserving the equipment and (iv) country of origin.

Food processing and packaging equipment can be directly distributed by state-owned enterprises and local private companies. However, state-owned distributors may have advantages over private ones due to stronger human resources, especially technical staff, and more solid financial capabilities. Distribution channels are straightforward. U.S suppliers can find local assistance and support from the U.S Commercial Service in Vietnam to investigate and select appropriate local distributors/partners. As the equipment is new to the market, preparation and training is essential.

Some types of food processing and packaging equipment are subject to import duties ranging from 1 to 50 percent. For many types of refrigeration equipment, duties may range from 1 to 75 percent.

8. UPCOMING TRADE SHOWS

8.1 Vietnam Fisheries International Exhibition (VietFish 2004)

Exhibits: Fish and shellfish processed, aquaculture technology and services, processing and packaging technology.

Time: June 14 – 17, 2004

Venue: Ho Chi Minh City International Exhibition and Convention Center (HIECC Center)
446 Hoang Van Thu St., Tan Binh Dist., Ho Chi Minh City.

Organizer: Vietnam Association of Seafood Exporters and Producers (VASEP)
11 Bis, Dinh Bo Linh St., Binh Thanh Dist., Ho Chi Minh City
Tel: [84]-8-511-0930 / 511-0932
Fax: [84]-8-511-0931
E-mail: **vasep-org@hcm.vnn.vn**
Website: **www.vietfish.com.vn**
Contact: Mr. Vo Thai Phong
E-mail: **phongvt@vasep.com.vn**

8.2 VietFood & Drink 2004

Exhibits: food and drink products; food stuff-processing technology and machinery; packaging chains; preservative equipment, preservative chemicals.

Time: September 7-11, 2004

Venue: Ho Chi Minh City International Exhibition and Convention Center (HIECC Center)
446 Hoang Van Thu St., Tan Binh Dist., Ho Chi Minh City

Organizer: Vietnam National Trade Fair & Advertising Co. (VINEXAD)
9 - 15 Dinh Le St., Hanoi
Tel: [84]-4-825-5546 / 934-0474
Fax: [84]-4-825-5556
E-mail: **vinexad@hn.vnn.vn**
Contact: Ms. Ta Thu Thuy

8.3 Food & Hotel Vietnam 2004

Exhibits: Catering to the food and hospitality industry.

Time: December 2 – 4, 2004

Venue: Ho Chi Minh City International Exhibition and Convention Center (HIECC Center)
446 Hoang Van Thu St., Tan Binh Dist., Ho Chi Minh City.

Organizer: Singapore Exhibition Services Pte Ltd co-ordinate with Vietnam Chamber of Commerce & Industry – VCCI Exhibition Service.
171 Vo Thi Sau St., Dist. 3, Ho Chi Minh City
Tel: [84]-8-932-0028 / 932-0177
Fax: [84]-8-932-5789
Website: **www.foodnhotelvietnam.com**
Contact: Mrs. Bui Thi Thuc Anh
E-mail: **thucanhvce@hcm.vnn.vn**

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