Volume: Aug-2024



Prepared by: AGRO(PNFO

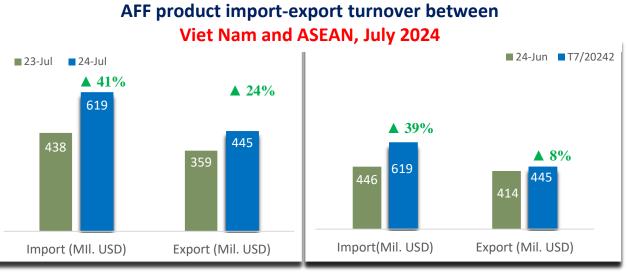
Ipard

MONTHLY REPORT ON AGRI-PRODUCT EXPORT

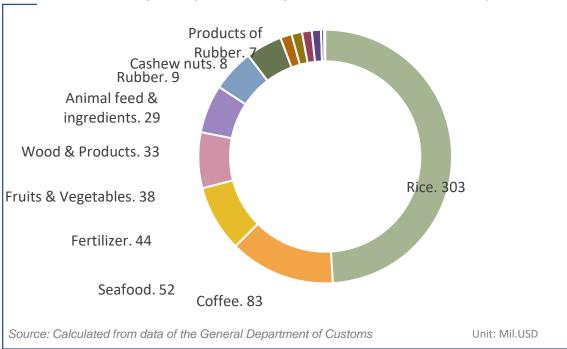
FROM VIETNAM TO ASEAN MARKET

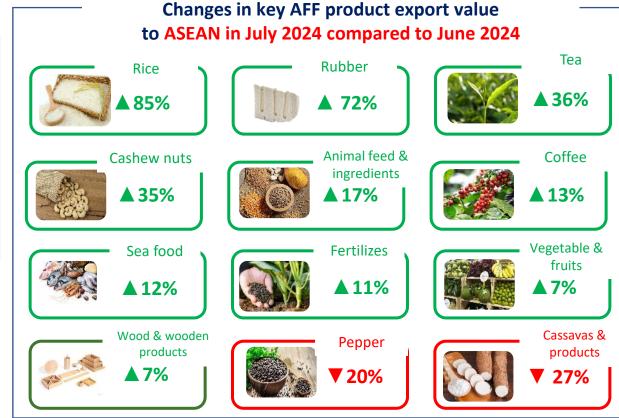


THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIETNAM TO ASEAN IN JULY 2024

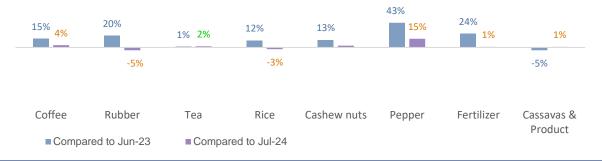


Key AFF product export value to ASEAN, July 2024





Changes in average export value of key AFF products to ASEAN in Jul-24 compared to Jul-23 and compared to Jun-24



SPOTLIGHT



Australia and New Zealand play important roles in ASEAN food security



Thailand expands crossborder payment services across ASEAN.



Australia and New Zealand play important roles in ASEAN food security

Australia and New Zealand are the world's leading exporters of grains, dairy products, meat, and oilseeds, while Southeast Asian countries are main importers of these commodities. In 2022-2023 fiscal year, Australia's wheat is mainly exported to Indonesia (3.49 million tons), Vietnam (2.38 million tons), South Korea (2.26 million tons), and the Philippines (2.22 million tons).

Food demand in the Southeast Asia is increasing due to population growth, the expansion of the middle class, and higher income. Australia and New Zealand has participated in cooperative mechanisms initiated by ASEAN that contributes to help two nations become necessary "food baskets" for ASEAN region as well as promoting export activities and intraregional trade.

Source: bnews.vn

Thailand expands cross-border payment services across ASEAN.

Two commercial banks from Thailand and six commercial banks from Laos will offer cross-border QR payment services to customers through mobile payment applications. Thailand is currently collaborating with five ASEAN member countrie (Cambodia, Indonesia, Malaysia, Singapore, and Vietnam) to implement the ASEAN Payment Connectivity initiative, with Laos being the sixth linkage.

According to the World Economic Forum, the digital payment market in Southeast Asia is rapidly growing across nations, driven by the increasing adoption of contactless payments, digital wallets, and e-commerce. The total digital payments in the six largest ASEAN economies reache 806 billion USD in 2022, a 14% increase year-on-year, and are projected to approach 1.2 trillion USD by 2025.



RICE

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200 200 100 100 0 0 2 3 4 5 6 10 11 12 2 5 6 1 9 1 3 4 2023 2024 Value — Volume

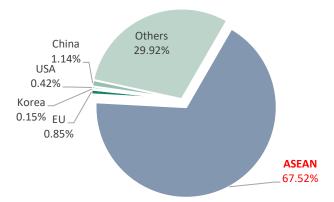
Export volume and value to ASEAN, Jul-2024

Export results to ASEAN, Jul-2024

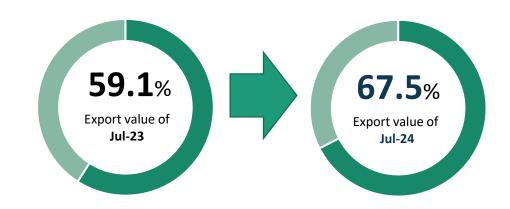
VALUE 303.8 mil.USD 7 Increase 83.9% compared to Jun-24 7 Increase 41.4% compared to Jul-23 7 76.2 Mil.USD more than the monthly average rate in 2023. • Accumulated 7 months of 2024 reaches 2.3 Bil.USD and the rate is 84.6% of the total in 2023.

VOLUME 525.8 Thousand tons Increase 89.1% compared to Jun-24 Increase 29.0% compared to Jul-23 Increase 29.0% compared to Jul-23 Increase 29.0% compared to Jul-23 Accumulated 7 months of 2024 reaches 3.8 mil. tons and the rate is 76.5% of the total in

Percentage of export value to ASEAN, Jul-2024

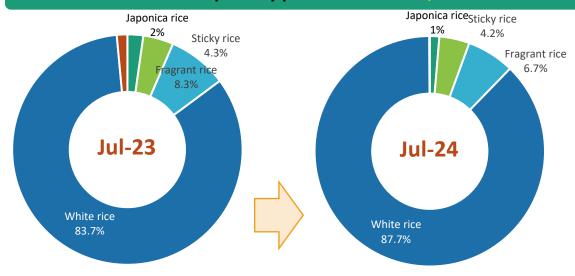


Changes in percentage of export value to ASEAN, Jul-2024

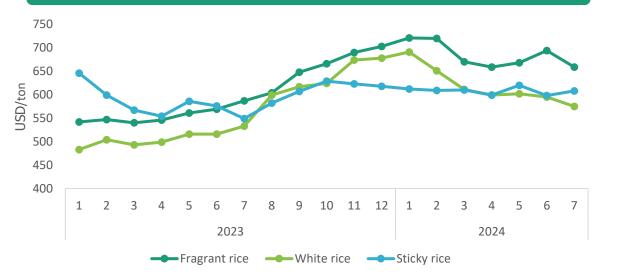




Structure of exports by products to ASEAN, Jul-2024



Average export price to ASEAN, Jul-2024



Export results to ASEAN, Jul-2024







White riceFragramValue: 266.3 Mil.USDValue: 20Increase 89% compared to Jun-24IncreaseIncrease 48% compared to Jul-23Increase

Fragrant rice Value: 20.3 Mil.USD Increase 65% compared to Jun-24 Increase 13% compared to Jul-23

Increase **49%** compared to Jun-24 Increase **41%** compared to Jul-23

Sticky rice

Value: 12.9 Mil.USD

Sticky rice

The average export price in Jul-24 is **608** USD/ton; increase **2**% compared to the previous month; and increase **11**% compared the same month of 2023.

Fragrant rice

The average export price in Jul-24 is **659** USD/ton; decrease **5**% compared to the previous month; and increase **12**% compared the same month of 2023.

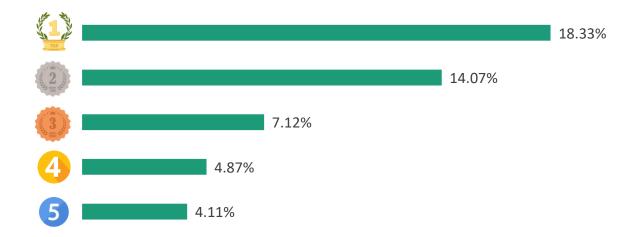
White rice

The average export price in Jul-24 is **575** USD/ton; decrease **3**% compared to the previous month; and increase **8**% compared the same month of 2023.



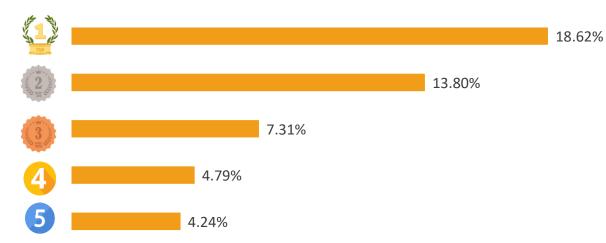
TOP 5 export enterprises by value to the ASEAN, Jul-2024

Value ratio of TOP 5 export enterprises to the ASEAN, Jul-2024

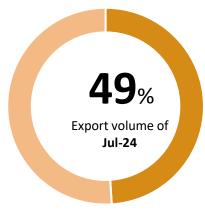




TOP 5 export enterprises by volume to the ASEAN, Jul-2024



Volume ratio of TOP 5 export enterprises to the ASEAN, Jul-2024





SPOTLIGHT

According to Indonesia's National Logistics Agency (Bulog), Indonesia will import an additional 900,000 tons of rice by the end of the year due to projected production decline and delays in rice planting. As of August 30, 2024, Bulog signed contracts for importing 2.7 million tons of rice under the allocated quota for this year (3.6 million tons). Rice prices in Indonesia continue to rise due to a supply-demand imbalance. In June 2024, rice prices were 12% higher compared to the same period last year. According to data from Indonesia's Statistics Agency, rice production from January to October 2024 is about 26.9 million tons, a 5% decrease compared to the same period in 2023. Indonesia's Meteorological, Climatological, and Geophysical Agency projects that dry season will extend until October, potentially delaying rice planting by approximately one month from the planned schedule.

Source: CafeF.vn

In its latest report on the global grain market, the United States Department of Agriculture (USDA) forecasts that the Philippines will import 4.6 million tons of rice in 2025, a reduction of 100,000 tons compared to the forecast in July 2024. The USDA adjusted the estimates due to an anticipated increase in domestic rice production in the Philippines in 2025, while rice consumption and reserves at the end of this crop year remain stable. The rice production of the Philippines will be about 12.7 million tons in 2025, approximately 3% higher than 2024. Meanwhile, rice consumption is expected to rise to 17.3 million tons from this year's 16.6 million tons. The Philippines is the sixth-largest rice consumer in the world.



According to the Bangkok Post, Charoen Laothamatas, President of the Thai Rice Exporters Association, Thailand's rice export is facing instability due to declining production of Thai rice varieties such as Pathum Thani fragrant rice and KB 79 rice. These varieties are being replaced by Vietnam's Jasmine 85 fragrant rice variety, which offers higher yields and a shorter growing period. Currently, about 80% of packaged rice sold in Thailand is Vietnam's Jasmine 85, leading to the disappearance of Pathum Thani fragrant rice from the market.

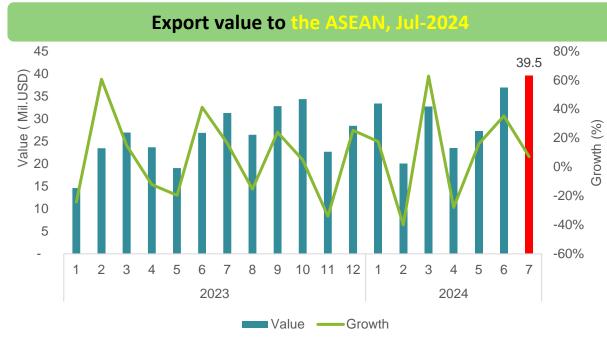




FRUITS AND VEGETABLES (EXPORT)

VALUE

Mil.USD



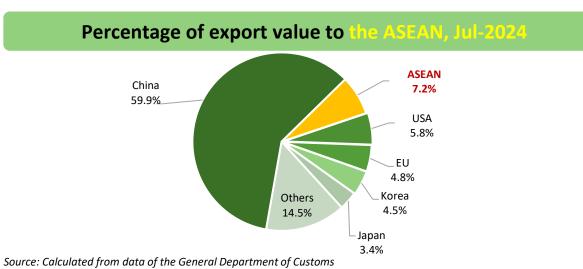
Export results to the ASEAN, Jul-2024

Increase 7.2% compared to Jun-24

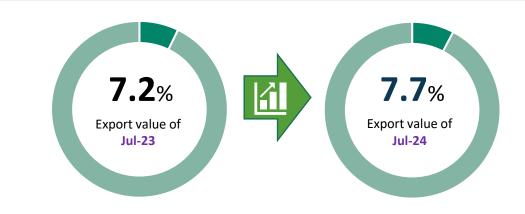
Increase 26.4% compared to Jul-23

13.6 Mil.USD more than the monthly average rate in 2023.

Accumulated 7 months of 2024 reaches 213.2 Mil.USD and the rate is 68.7% of the total in 2023.



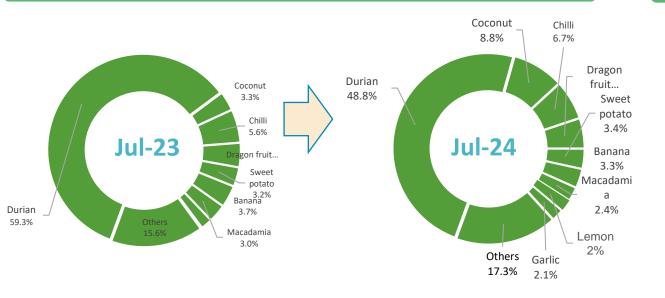
Changes in percentage of export value to the ASEAN, Jul-2024





FRUITS AND VEGETABLES (EXPORT)

Structure of exports by products to the ASEAN, Jul-2024



Export results to the ASEAN, Jul-2024



Durian Value: 19.3 Mil.USD Increase 2.5% compared to Jun-24 Increase 4.0% compared to Jul-23



Coconut Value: 3.5 Mil.USD Increase 28.4% compared to Jun-24 Increase 241.8% compared to Jul-23



Chilli Value: 2.7 Mil.USD Increase 38.9% compared to Jun-24 Increase 51.0% compared to Jul-23



Dragon fruit

Value: **2.0** Mil.USD Increase **9.9**% compared to Jun-24 Increase **58.2**% compared to Jul-23



Sweet potato Value: 1.4 Mil.USD Increase 15.0% compared to Jun-24 Increase 33.9% compared to Jul-23



Banana Value: 1.3 Mil.USD Increase 12.7% so với T6/2024 Increase 11.0% compared to Jul-23



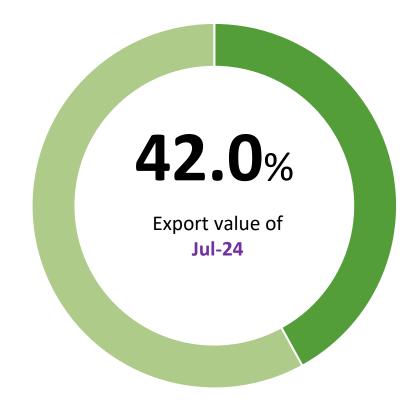
Macadamia Value: 0.94 Mil.USD Decrease 10.1% compared to Jun-24 Increase 37.9% compared to Jul-23



FRUITS AND VEGETABLES (EXPORT)

TOP5 export enterprises by value to the ASEAN, Jul-2024 12.5% 10.3% 8.1% 7.6% 3.5%

Value ratio of TOP 5 export enterprises to the ASEAN, Jul-2024

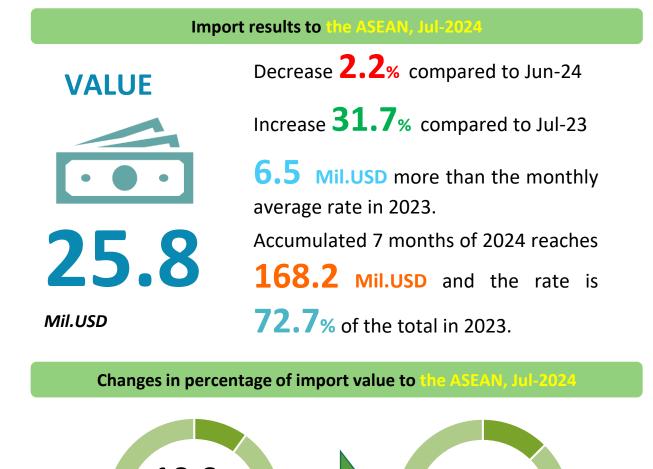


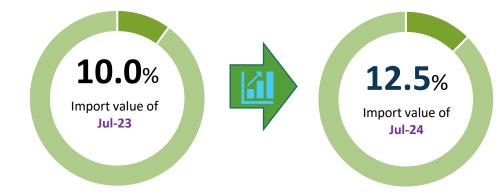


FRUITS AND VEGETABLES (IMPORT)

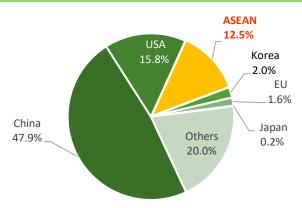
30 50% Value (Mil.USD) 25.8 40% 25 30% 20 20% 🛞 Growth (10% 15 0% 10 -10% 5 -20% -30% 12 1 2 3 8 10 11 2 4 5 6 9 6 7 2023 2024 Value Growth

Import value to





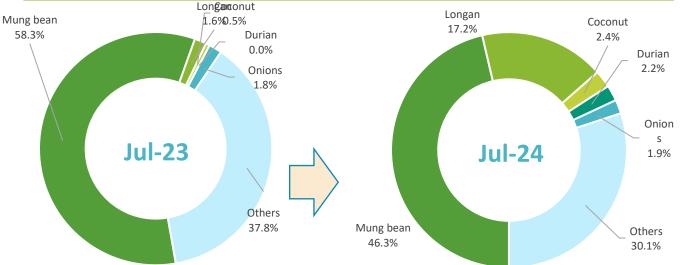
Percentage of import value to the ASEAN, Jul-2024





FRUITS AND VEGETABLES (IMPORT)

Structure of imports by products from the ASEAN, Jul-2024



Import results from the ASEAN, Jul-2024



Mung bean Value: 11.9 Mil.USD Increase 4.4% compared to Jun-24 Increase 4.8% compared to Jul-23



Longan Value: 4.4 Mil.USD Gấp 11.6 lần compared to Jun-24 Gấp 13.4 lần compared to Jul-23



Coconut

Value: **0.61** Mil.USD Decrease **1.4**% compared to Jun-24 Increase **486.8**% compared to Jul-23

Durian Value: 0.56 Mil.USD Decrease 88.8% compared to Jun-24 803.7% time compared to Jul-23



Onions Value: 0.49 Mil.USD Increase 375.3% compared to Jun-24 Increase 38.8% compared to Jul-23

FRUITS AND VEGETABLES

SPOTLIGHT





Indonesian durian seeks to access the Chinese market.

In recent years, the Indonesian government tried to convince to China through bilateral and multilateral diplomatic engagements that its durians meet export standards of China. On August 23, during a diplomatic visit to China, Mrs Retno Marsudi - Foreign Minister met with Mr Wang Yi - Foreign Minister of China to secure a protocol that would allow Indonesia to export "king of fruits" to the world's most populous country.

China's General Administration of Customs also expressed interest in organizing an on-site inspection of durian plantations and packaging facilities to assess the quality and safety standards before approving the import of this product. Once approved, Indonesia will be able to export durians to China.

Source: Vietnamplus.vn

Malaysia exports fresh durian to China for the first time.

Malaysia began to export fresh durians to China on August 24, two months after the two countries signed a protocol on phytosanitary requirements. A bout 40 tons of fresh durians, including Musang King, Black Thorn, D24, and IOI, from eight export companies will be shipped to China in three batches. Specifically, the first batch of 15 tons was sent on August 24, the second batch of 10 tons on August 25, and the remaining amount will be delivered in the third batch.

Source: E.vnexpress.net

FRUITS AND VEGETABLES

their uncompetitive behaviours.





The Philippine Competition Commission will sue a group of onion importers and traders for

SPOTLIGHT

The Philippine Competition Commission (PCC) is preparing to initiate legal action against a group of 12 onion importers and traders because they engage in undermining competitive market conditions

These importers and traders are accused of orchestrating an agreement to assign among themselves sanitary and phytosanitary import clearances (SPSICs) that provided by the Department of Agriculture-Bureau of Plant Industry (DA-BPI), thereby controlling the distribution of imported onion within the Philippines.

The PCC has determined such actions to be anti-competitive, noting the potential to significantly distort competition in the market by controlling more than half of the country's onion imports during the period under review.

A total punishment of P2.4 billion (42,7 Mil. USD) against the entities involved.

Source: Freshplaza.com



Value (Mil. USD) Volume (thousand tons) 11 12 1 Valume — Volume

Export volume and value to the ASEAN, Jul-2024

Export results to the ASEAN, Jul-2024

VALUE 83.3_{Mil.Usd}

- ↗ Increase 13.5% compared to Jun-24
- ↗ Increase 129% compared to Jul-23

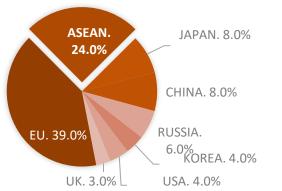
40.9 Mil.USD more than the monthly average rate in 2023.

Accumulated 7 months of 2024 reaches
553.5 Mil.USD, and the rate is 108.8% of the total in 2023.

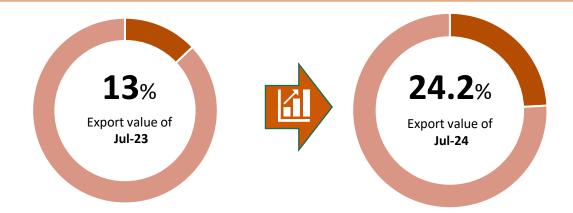
15.2 Thousand tons
Increase 3.3% compared to Jun-24
Increase 57.9% compared to Jul-23
2.8 Thousand tons more than the monthly average rate in 2023.
Accumulated 7 months of 2024 reaches
134.7 Thousand tons, and the rate is 90.7% of the total in 2023.

VOLUME

Percentage of export value to the ASEAN, Jul-2024



Changes in percentage of export value to the ASEAN, Jul-2024

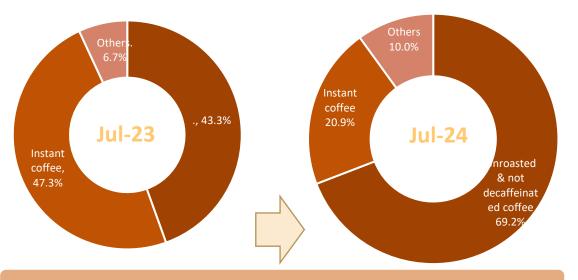




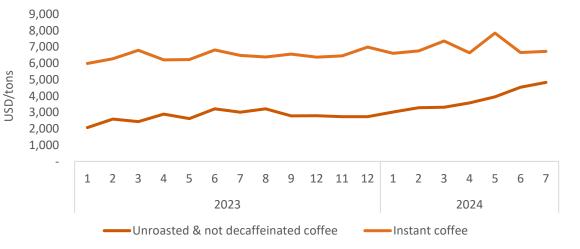
COFFEE

Structure of exports by products to the ASEAN, Jul-2024

Export results to to the ASEAN, Jul-2024



Average export price to to the ASEAN, Jul-2024



Source: Calculated from data of the General Department of Customs



Unroasted & not decaffeinated coffee

Value: 55.4 Mil.USD	Value: 16.7 Mil.USD
Increase 22.9% compared to Jun-24	Increase 20.9 % compared Jun-24
Increase 258 % compared to Jul-23	Decrease 1.1% compared t 23



Instant coffee



Others

6.7 Mil.USD	Value: 8 Mil.USD
e 20.9% compared to	Decrease 29.3 % compared
	to Jun-24
e 1.1 % compared to Jul-	Increase 232% compared to Jul-23

Instant coffee

The average export price in Jul-24 is **6.716** USD/ton. Increase **1**% compared to the previous month; and Increase **8.9**% compared the same month of 2023.

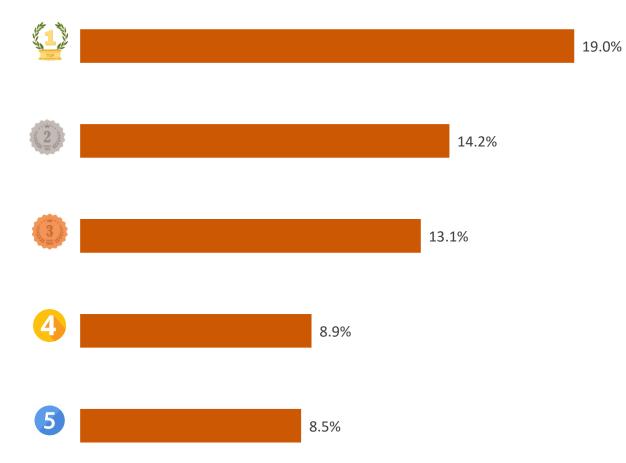
Unroasted & not decaffeinated coffee

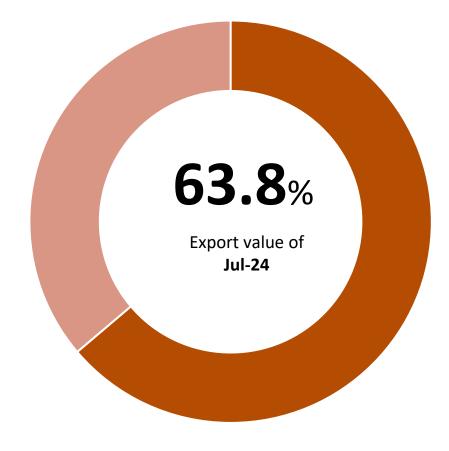
The average export price in Jul-24 is **4.824** USD/ton; increase **6.4**% compared to the previous month; and increase **60.4**% compared the same month of 2023.



TOP 5 export enterprises by value to the ASEAN, Jul-2024

Value ratio of TOP 5 export enterprises to the ASEAN, Jul-2024











SPOTLIGHT

The Thai instant coffee market will grow by 5%.

According to a representative of Nestlé (Thai) Ltd, Thailand's average coffee consumption per capita is about 340 cups per year. The Thai instant coffee market is expected to grow by 5% in 2024 as Nescafé Thailand plans to allocate 620 million baht for brand promotion.

Source: Bangkok Post (8/2024)

Indonesia is working to improve and synchronize forest data.

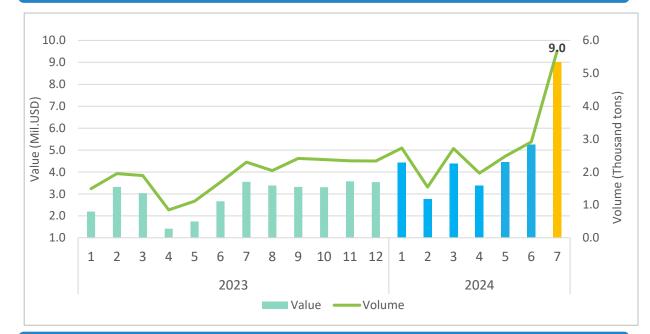
The Indonesian government is working to improve and harmonize its forest data and supply chains to comply with increasingly stringent sustainability standards, including the European Union Deforestation Regulation (EUDR). Indonesia's forest data is currently inconsistent with EU data so that Indonesia faces difficults to export forest-related commodities such as palm oil, coffee, and cocoa in the future. Indonesia is working with the EU to address this issue and develop a supply chain traceability system to prove that products are unrelated to deforestation.

Source: mongabay.com (8/2024)

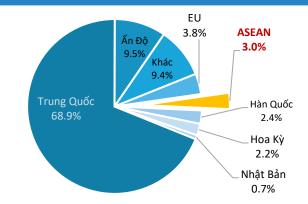




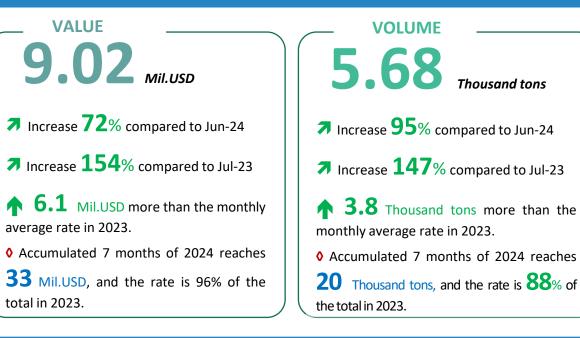
Export volume and value to ASEAN, Jul-2024



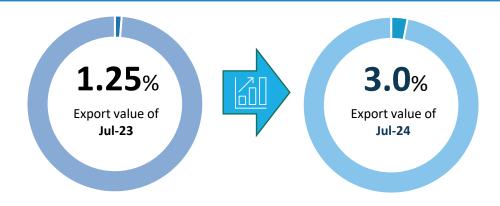
Percentage of export value to ASEAN, Jul-2024



Export results to ASEAN, Jul-2024



Changes in percentage of export value to ASEAN, Jul-2024

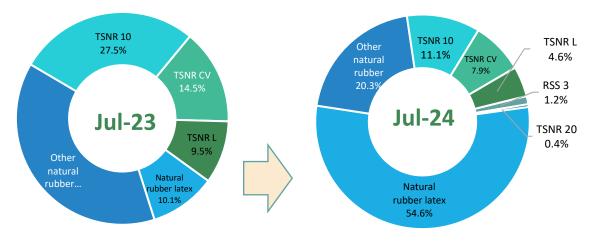






Structure of exports by products to ASEAN, Jul-2024

Export results to ASEAN, Jul-2024





Other natural rubber Value: 1.83 Mil.USD Increase 162% compared to Jun-24 Increase 34% compared to Jul-23

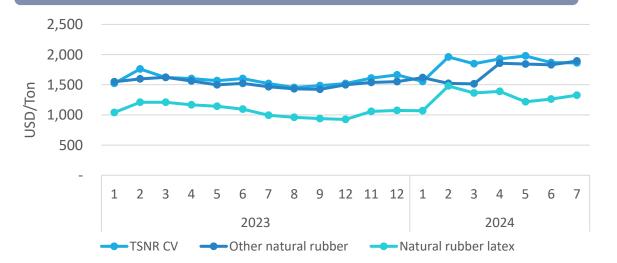


24



Natural rubber latex **TSNR CV** Value: 4.93 Mil.USD Value: 0.71 Mil.USD Increase 472% compared to Jun- Increase 208% compared to Jun-24 Increase 1.275% compared to Jul-Increase 38% compared to Jul-23 23

Average export price to ASEAN, Jul-2024



Other natural rubber

The average export price in Jul-24 is **1.892** USD/ton; Increase **3.4**% compared to the previous month; and Increase **22.5**% compared the same month of 2023.

TSNR CV

The average export price in Jul-24 is **1.862** USD/ton; Decrease **0.3**% compared to the previous month; and increase **26**% compared the same month of 2023.

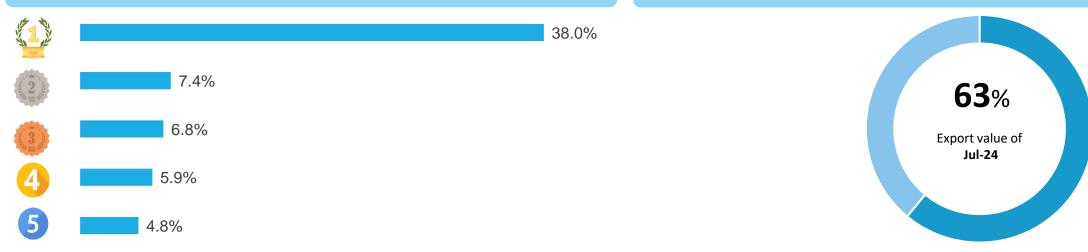
Natural rubber latex

The average export price in Jul-24 is **1.327** USD/ton; Increase **5.1**% compared to the previous month; and Increase **33.4**% compared the same month of 2023.

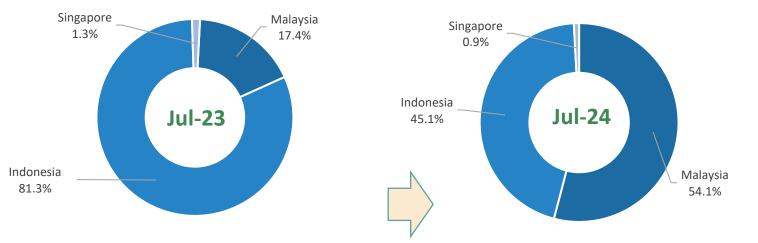


TOP 5 export enterprises by value to ASEAN, Jul-2024

Value ratio of TOP 5 export enterprises to ASEAN, Jul-2024



Fluctuations in the proportion of Vietnam's rubber exports to some ASEAN countries, Jul-2024







SPOTLIGHT

✤ In the seven months of 2024, Cambodia exported 173,915 tons of natural rubber latex with value of 269 million USD, up 1.72% in volume and 12.4% in value over the same period last year. The average export price was 1,547 USD/ton, about 147 USD higher than the previous year's period. The main export markets are Malaysia, Vietnam, Singapore, and China.

Up to now, Cambodia has 407,172 hectares of rubber. Of which, harvested rubber area is 320,184 hectares, accounting for 78.6% of the total rubber planting area.

Source: General Directorate of Rubber

✤ In the first quarter of the 2024/2025 fiscal year, Myanmar exported over 62,000 tons of natural rubber, generating more than 87 million USD in revenue. Myanmar has set a target to export over 300,000 tons of rubber during this fiscal year.

Currently, 70% of Myanmar's rubber is exported to China, and others to Singapore, Indonesia, Malaysia, Thailand, Vietnam, South Korea, India, Japan, and other countries. Rubber production is primarily concentrated in the Mon and Kayin states and the Taninthayi, Bago, and Yangon regions.

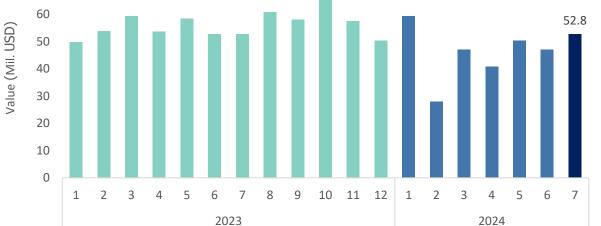
Source : Global New Light of Myanmar

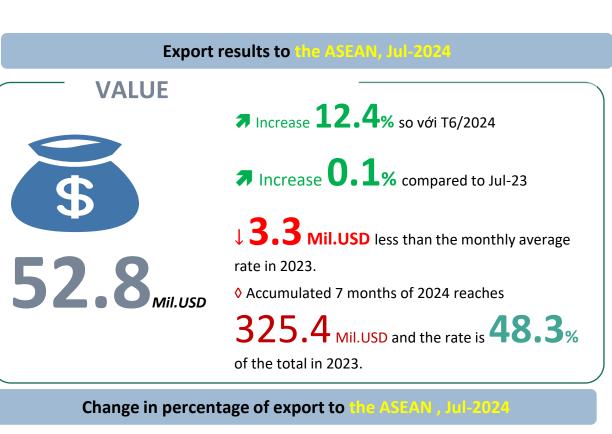


FISHERIES

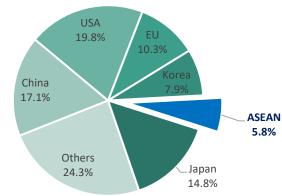
 Export value to the ASEAN, Jul-2024

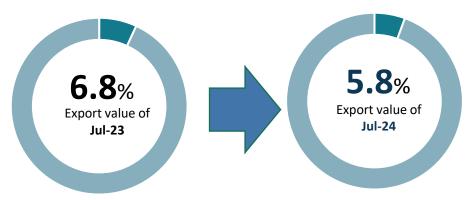
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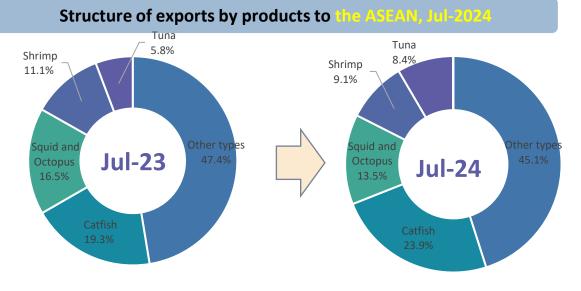
Percentage of export value to the ASEAN, Jul-2024



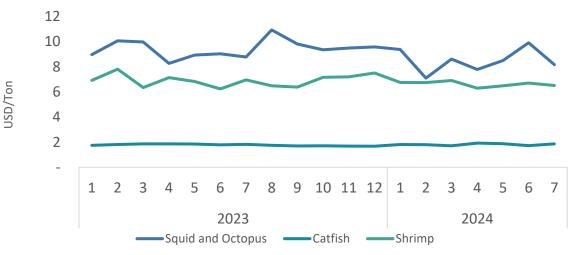




FISHERIES



Average export price to



Export results to the ASEAN, Jul-2024



Catfish

to Jun-24

to Jul-23





Decrease **0.1**% compared

Decrease **17.6**% compared

Shrimp

to Jun-24

to Jul-23

Value: 4.8 Mil.USD

Squid & Octopus Value: 12.6 Mil.USD Value: 6.9 Mil.USD Increase **11.7**% compared Increase 2.4% compared to Jun-24 Increase 24.3% compared Decrease **18.4**% compared to Jul-23

Squid and octopus

The average export price in Jul-24 is 8.2 USD/kg; decrease 17.6% compared to the previous month; and decrease 7.0% compared the same month of 2023.

Catfish

The average export price in Jul-24 is **1.9** USD/kg; increase **7.9%** compared to the previous month; and increase 2.3% compared the same month of 2023.

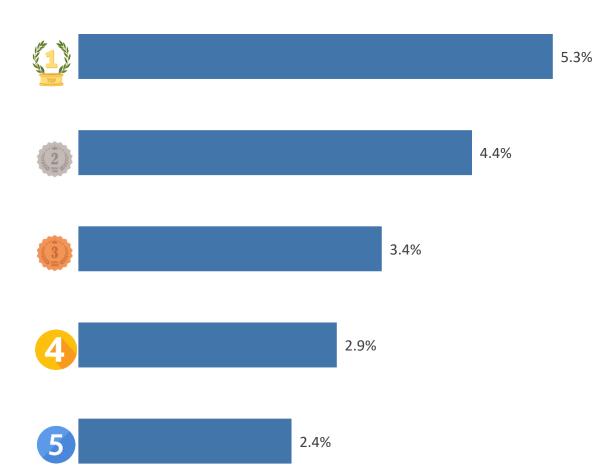
Tôm

The average export price in Jul-24 is 6.5 USD/kg; decrease 2.7% compared to the previous month; and decrease 6.4% compared the same month of 2023.

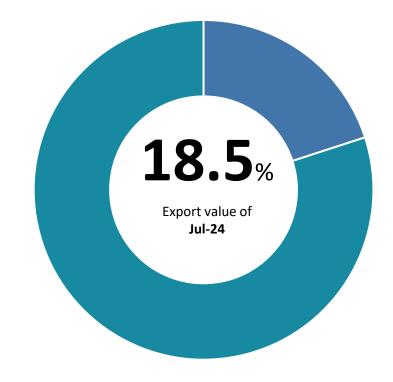




TOP 5 export enterprises by value to the ASEAN, Jul-2024



Value ratio of TOP 5 export enterprises to the ASEAN, Jul-2024



FISHERIES

SPOTIGHT



Indonesia and France are negotiating an agreement on seafood quality assurance.

Indonesia and France are discussing a mutual recognition agreement in seafood quality assurance. If the agreement is signed, it will facilitate to access to the French seafood market.

The Indonesian Marine and Fisheries Quality Assurance Agency (MFQAA) stated that the agreement will promote trade by harmonizing mechanisms for licensing and import-export approvals. Recently, Indonesia separated its seafood quarantine agency from the MFQAA, but the MFQAA director assured that this organizational change does not affect the quality of Indonesia's seafood products. Indonesia remains committed to maintain seafood quality to enhance its access to the global market.

Source: Jakartaglobe (8/2024)





FISHERIES

SPOTLIGHT

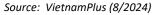
02

Thailand trys to find solutions to the EC's IUU problem.

Since receiving a "yellow card" from the European Commission (EC) in April 2015, the Thailand's government has implemented several stringent measures, including issuing the 2015 Fisheries Law, which is considered one of the strictest fisheries regulations globally. As a result, Thailand achieved notable progress and had the yellow card removed in 2019. However, these measures have also had a significant impact on the fishing industry, particularly on fishermen. According to the National Fisheries Association of Thailand (NFAT), since the implementation of the 2015 Fisheries Law, the Thailand fishing industry has lost approximately 8.5 billion USD annually. Thousands of fishermen have had to cease fishing activities, and Thailand, from an exporter of seafood, now imports 600,000 tons of seafood annually.

To balance compliance with EC requirements and protect the livelihoods of fishermen, the Thailand government is planning to revise the 2015 Fisheries Law and issue the revision later this year. These proposed amendments aim to relax certain IUU (Illegal, Unreported, and Unregulated) fishing control regulations, reduce penalties, and adjust monitoring mechanisms to support the domestic fishing sector. Thailand is intensifying patrols and enforcement at sea, addressing foreign vessels violating IUU regulations to maintain credibility with the EC. Thailand's efforts to address this challenge could be a valuable lesson for other coastal nations, including Vietnam.



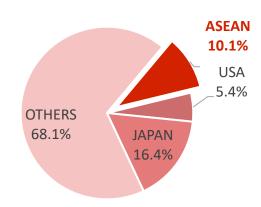




MEAT & MEAT PRODUCTS (EXPORT)

Export value to the ASEAN, Jul-2024

Percentage of export value to the ASEAN, Jul-2024



Export results to the ASEAN, Jul-2024

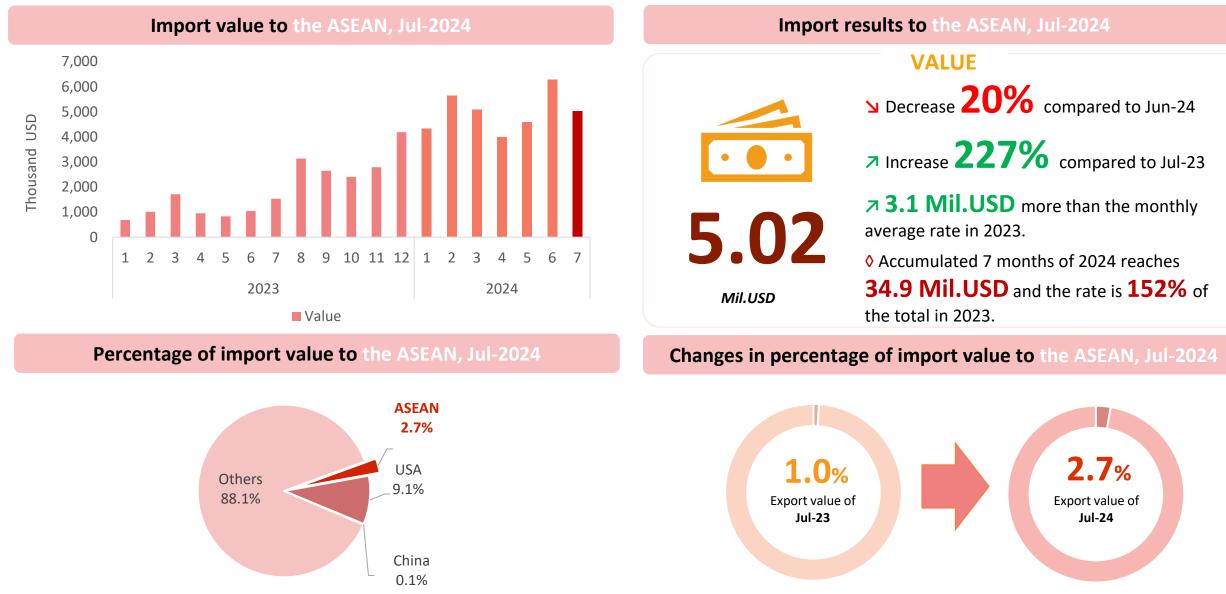


Changes in percentage of export value to the ASEAN, Jul-2024



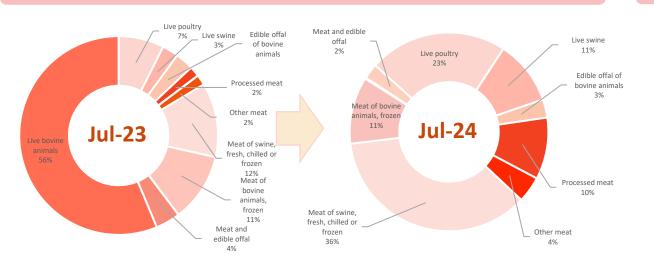


MEAT & MEAT PRODUCTS (IMPORT)





MEAT & MEAT PRODUCTS (EXPORT)



Export value to the ASEAN, Jul-2024

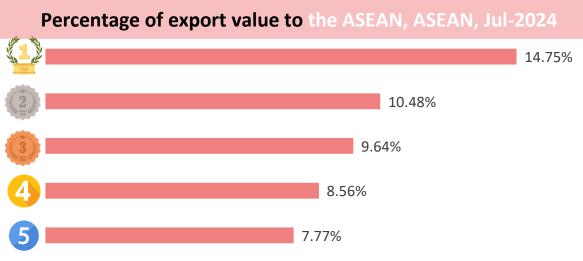
Export results to the ASEAN, Jul-2024



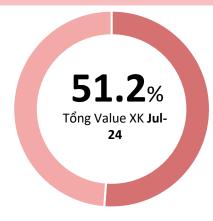
Meat of swine, fresh, chilled or frozen Value: 446.2 thousand USD Increase 176% compared to Jun-24 Increase 4.1% compared to Jul-23



Live poultry Value: 279.1 Mil.USD Increase 20.5% compared to Jun-24 Increase 6.4% compared to Jul-23



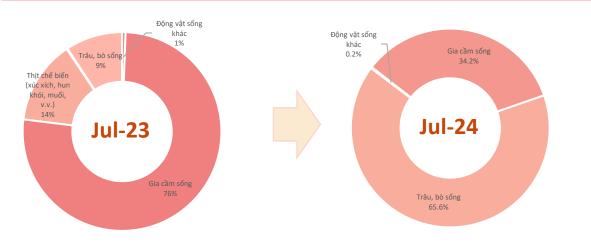
Changes in percentage of export value to the ASEAN, Jul-2024





MEAT & MEAT PRODUCTS (IMPORT)

Import value to the ASEAN, Jul-2024



Import results to the ASEAN, Jul-2024

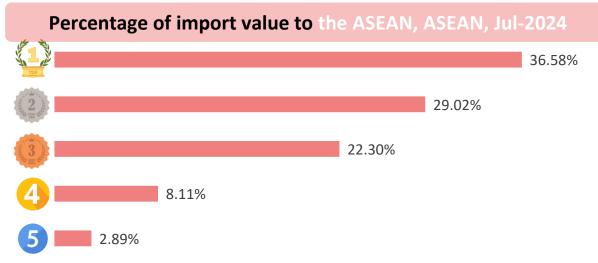


Live bovine animals Value: 3.29 Mil.USD Decrease 22.1% compared to Jun-24 Increase 2217% compared to Jul-23



Live poultry

Value: **1.72** Mil.USD Decrease **14.8**% compared to Jun-24 Increase **46.3**% compared to Jul-23



Changes in percentage of import value to the ASEAN, Jul-2024





MEAT & MEAT PRODUCTS

On August 11, 2024, the Kampong Speu Province, Cambodia, inspected a truck carrying 6,199 tons of contaminated frozen meat and unknown origin. Customs and Excise officials of Kampong Speu Province coordinated with the General Department of Consumer Protection, Competition and Fraud Prevention (CCF) under the Ministry of Commerce and the Kampong Speu Provincial Military Police to destroy the goods, including 40 boxes of fried chicken meatballs, 45 boxes of meatballs, 24 boxes of grilled chicken meatballs, 49 boxes of duck blood, five boxes of beef belly, four boxes of salmon fins, 24 boxes of pigtails, 29 boxes of chicken, 40 boxes of boxes of pork ribs.

SPOTLIGHT

Source: 3tres3.com

The Indonesian Ministry of Agriculture has decided to icrease the breeding herd to 1.2 million heads to achieve the goal of beef self-sufficiency and ultimately turning Indonesia into the world's food reserve by 2045.

Source: 3tres3.com



Any comments, please send to:

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