



VIETNAM PEPPER PRODUCING – TRADING

Mr. Đỗ Hà Nam – VPA chairman



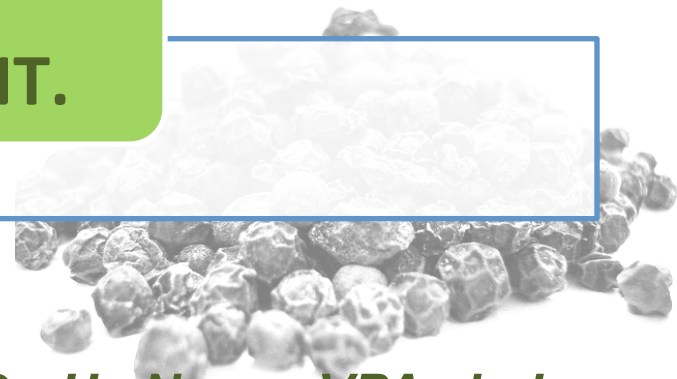
VIETNAM PEPPER



VIETNAM PEPPER REVIEW 2015

VIET NAM PEPPER OUTLOOK 2016

**GOVERNMENT INPUTS FOR
VIETNAM PEPPER DEVELOPMENT.**



Mr. Do Ha Nam – VPA chairman



VIETNAM PEPPER REVIEW 2015



Cultivation review

year	Growing area (Ha)	Harvesting area (Ha)	(+/-) from 2010
2010	50,000	45,000	
2011	53,000	46,000	3,000
2012	58,000	46,500	8,000
2013	64,500	51,000	14,500
2014	80,000	55,000	30,000
2015	86,000	62,000	36,000



Mr. Do Ha Nam – VPA chairman

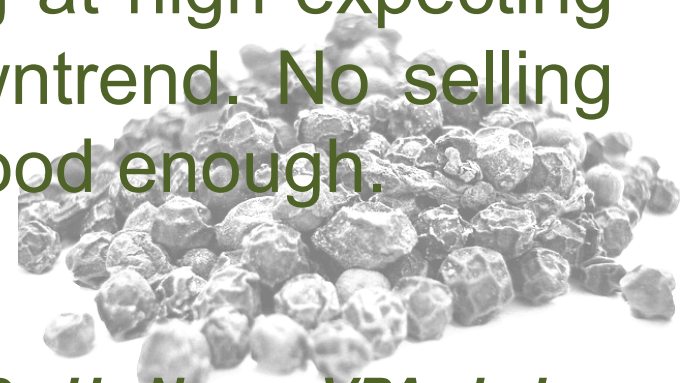


VIETNAM PEPPER REVIEW 2015



ADVANTAGES

- ***Growing area:***
Rapid increasing new planting area in 2014, 2015
- ***Production:***
130,000 Mt, down 17% vs. 2014
- ***Export price:*** Record high prices bring good benefit for farmers.
- Vietnamese farmers are selling at high expecting levels, limit selling flow at downtrend. No selling pressure as their income are good enough.



Mr. Do Ha Nam – VPA chairman







VIETNAM PEPPER REVIEW 2015



ADVANTAGES

- Vietnam exporting prices are 10-20% lower than other origins, export markets are expanding to most of main consuming country globally.
- 20 processing factories for clean pepper ASTA (including 5 FDI factories)
- Average yield 2 Mt/ha in 2015
- Top Vietnam exporters and FDI exporters get alliance with main pepper growing provinces for sustainable safe and clean pepper cultivation.



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VIETNAM PEPPER REVIEW 2015



DISADVANTAGES

- Fast and uncontrollable planting area spreading (including some areas without favorable soil and weather condition) due to better profit given by pepper than others tree.
- Most of cultivation unit is small holdings size (average 1 ha size)
- Dead trees caused by bad varieties selection, and non – Vietgap - application.



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VIETNAM PEPPER REVIEW 2015

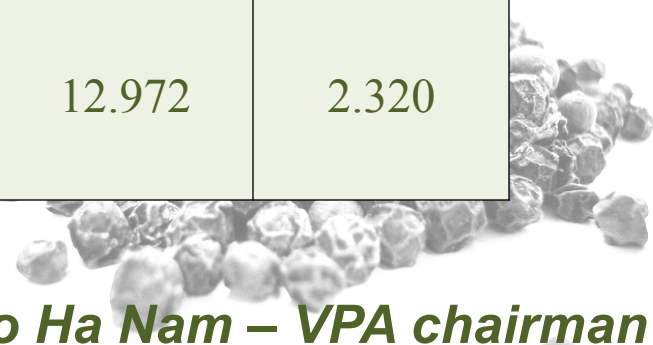


EXPORT 2015

Total Export 2015 (MT)	(+/-) 2014	Black pepper (MT)	(+/-) 2014	White pepper (MT)	(+/-) 2014
133,569	- 14,6%	115,446	- 22,9%	18,123	+4,4%

Export value (millions USD)	(+/-) 2014	Black pepper (millions USD)	(+/-) 2014	White pepper (millions USD)	(+/-) 2014
1.276,2	+5,4%	1.041,2	+0,45%	235,0	+ 35,2%

Average export price	Black pepper	(+/-) 2014	White pepper	(+/-) 2014
(USD/MT)	9018	1.620	12.972	2.320



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VIETNAM PEPPER REVIEW 2015



TRADING REVIEW WITH USA EXPORTATION TO USA 2006-2015

Year	Volume (MT)			Value (Mil USD)			Price (USD/MT)	
	Black pepper	White pepper	Total	Black pepper	White pepper	Total	Black pepper	White pepper
2006	15,641	2,481	18,122	25.08	5.6	30.68	1,603	2,257
2007	5,922	798	6,720	17.48	2.91	20.39	2,952	3,647
2008	12,210	1,240	13,450	39.42	6.6	46.02	3,229	5,323
2009	12,083	2,834	14,917	33.71	9.84	43.55	2,790	3,472
2010	13,980	2,434	16,414	49.24	11.09	60.33	3,522	4,556
2011	19,569	2,767	22,336	114.92	22.44	137.36	5,873	8,110
2012	15,385	1,762	17,147	105.18	15.93	121.11	6,837	9,041
2013	23,330	2,707	26,037	159.86	24.46	184.32	6,852	9,036
2014	29,703	2,151	31,854	233.86	23.84	257.7	7,873	11,083
2015	24,684	2,103	26,787	243.81	26.96	270.77	9,877	12,820

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VIETNAM PEPPER REVIEW 2015



USA remains a biggest Vietnam pepper importing country

Importing countries	2013	2014	2015
America	26.037	31.854	26,787
United Arab	9.026	11.324	11,166
Singapore	11.447	15.658	9,614
India	5.61	10.392	8,437
Netherlands	8.374	9.317	6,979
Germany	11.035	5.21	6,031
Korea	2.953	3.887	4,295
Egypt	4.166	4.581	4,220
Spain	3.387	3.494	3,890
England	4.383	3.672	4,033
Khác	47.969	57.007	38.319
TOTAL	134.387	156.396	133,569

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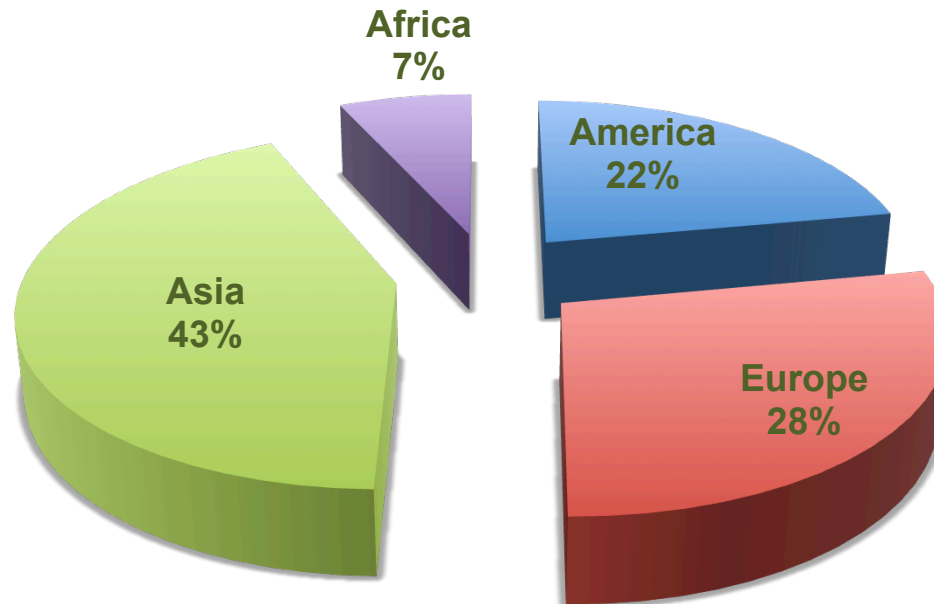


VIETNAM PEPPER REVIEW 2015



Exporting

Vietnam export market share 2015



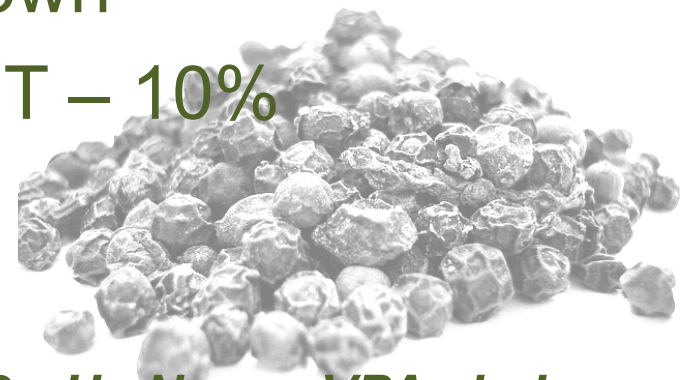
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VIETNAM PEPPER OUT LOOK 2016



- Continuing expansion planting areas – possibility 100,000 ha.
- Drought in highland due to El nino, affect to harvest yield and production.
- outlook 2016 :
 - + Production: 140,000 Mt - 10% increase from 2015, (increasing harvesting areas);
 - + Export price stable or slight down
 - + Export volume apx. 150,000MT – 10% increase from 2015



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GOVERNMENT INPUT FOR VIETNAM PEPPER DEVELOPMENT.



CULTIVATION SUPPORT:

- Sustainable development
- Planting to be projected only for favorable area
- Producing control: VietGAP, IPC GAP;
- Specialization growing area setting
- Strengthen farmers training, supporting network



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GOVERNMENT INPUT FOR VIETNAM PEPPER DEVELOPMENT.



PROCESSING AND EXPORTING SUPPORT

- To support Technical processing investment
- To coordinate with import countries setting up quality inspection standard as requirement.
- To upgrade inspection lab system
- To control planting, fertilizer, pesticide ensure importing countries quality standard.

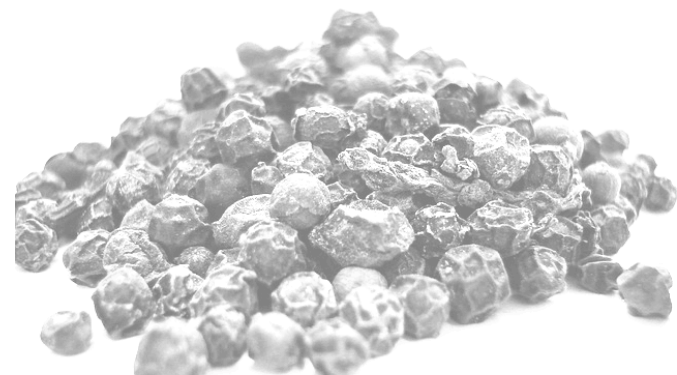


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Vietnam pepper association

THANK YOU



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