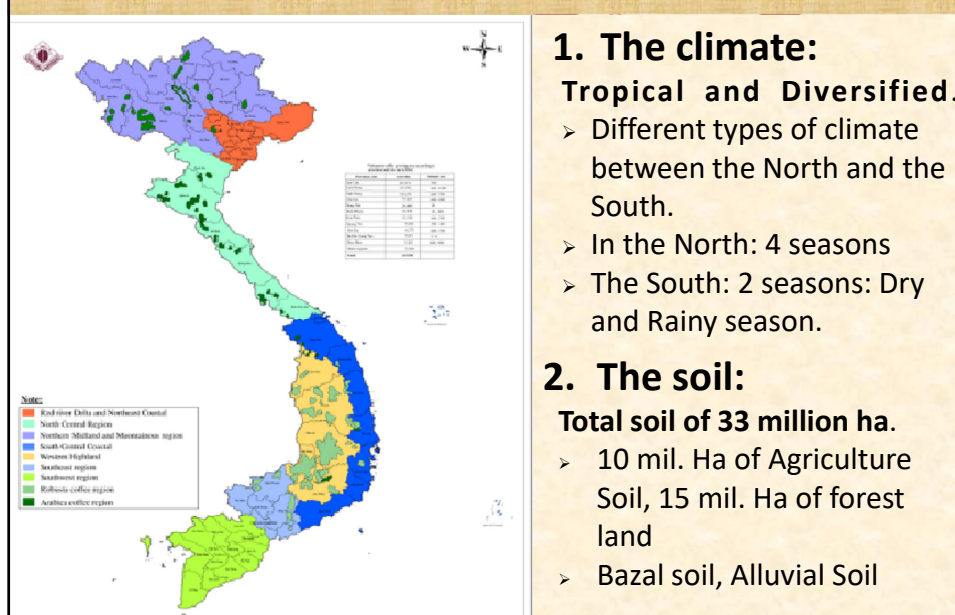




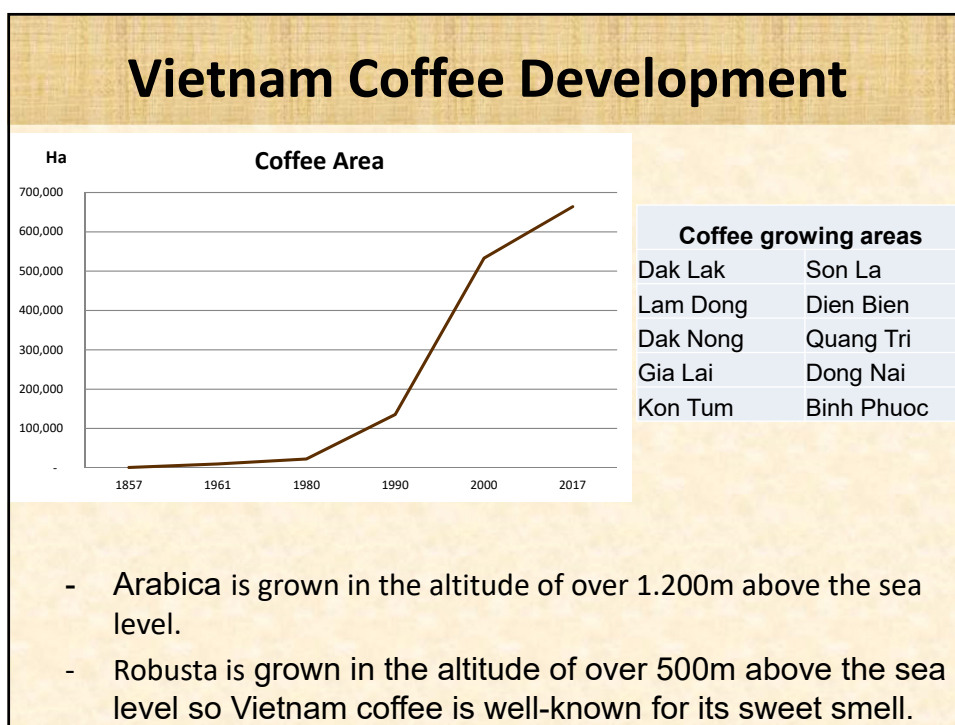
Vietnam Nature Condition



Vietnam Coffee Map

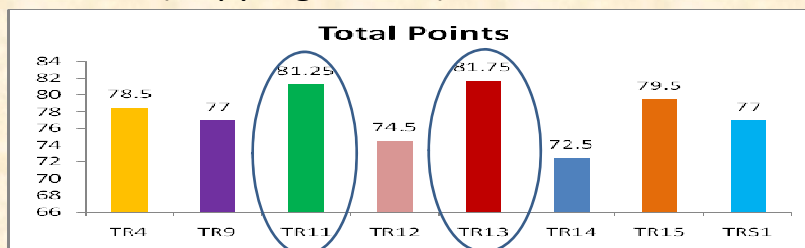


Vietnam Coffee Development

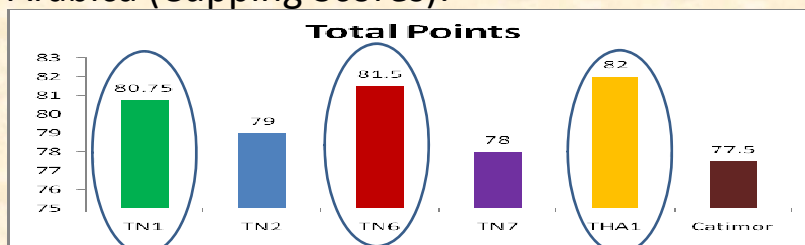


Vietnam Coffee Varieties

The Robusta (Cupping Scores):



The Arabica (Cupping Scores):



Vietnam Coffee Quality

Much improvement during the past time thank to (1). Good agriculture Practice Applying. (2). Increasing of capacity of after-harvesting processing factories, using the wet processing:

- Over 60% of area is certified by 4C, Utz, Rainforest Alliance, Fairtrade.....
- Vietnam government has implemented Premium Coffee program for both Arabica and Robusta.
- Win Silver Medal for AROMA
- Win Brone Medal for Intensive Coffee
- Win the second best for Arabica in ABODY certificate with the scores of 84.63

Vietnam Coffee Production and Export

- **Export Volume and Value: Export market of Vietnam Coffee is over 80 countries and territories worldwide.**

MY (October-September)	2013/14	2014/15	2015/16	2016/17	2017/18f
Export volume (thousand tons)	1,469.06	1,256.64	1,566.77	1,385.49	1,400.00
% change	18.10%	- 14.29%	24.60%	- 11.46%	0.72%
Export value (million US\$)	2,909.40	2,481.83	2,701.99	3,036.13	2,700.00
% change	- 5.40%	- 14.78%	8.87%	12.59%	- 11.18%

Challenges of Vietnam coffee industry

- **Climate change**
- **Volatility of globe price and long period of downtrend price.**
- **Alternative crops: Avocado, Durian...**
- **Too many smallholdings: 600.0000 farm households with average farm-size of less than 1ha and limited access to credit**
- **Limited value chain integration**

New development period of Vietnam Coffee Industry

Remain the position of 2nd biggest green bean coffee exporter of the world and double the export value to 6 billion USD:

- Focus on productivity and quality improvement through coffee rejuvenation program.
- Promote the development of cooperatives and value chain linkages
- Invest in processed coffee: roasted coffee, soluble coffee, 3in1 and 2in1 coffee.
- Trademark promotion and expand export market for roasted and ground coffee, 3in1 and 2in1, soluble and others.
- Increase domestic consumption to 15%.

Coffee Estimation for 2019/20

- **Coffee production of Vietnam will reduce remarkably (Estimation of 15% reduction):**
 - The El nino will come again in 2019 and put serious impact on coffee.
 - The long period downtrend of global price may restrict farmers' efforts to improve productivity.

