



FRUIT AND VEGETABLE REPORT

2023



Prepared by: Information Center for Agriculture and Rural Development



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I. PRODUCTION OF FRUIT AND VEGETABLES

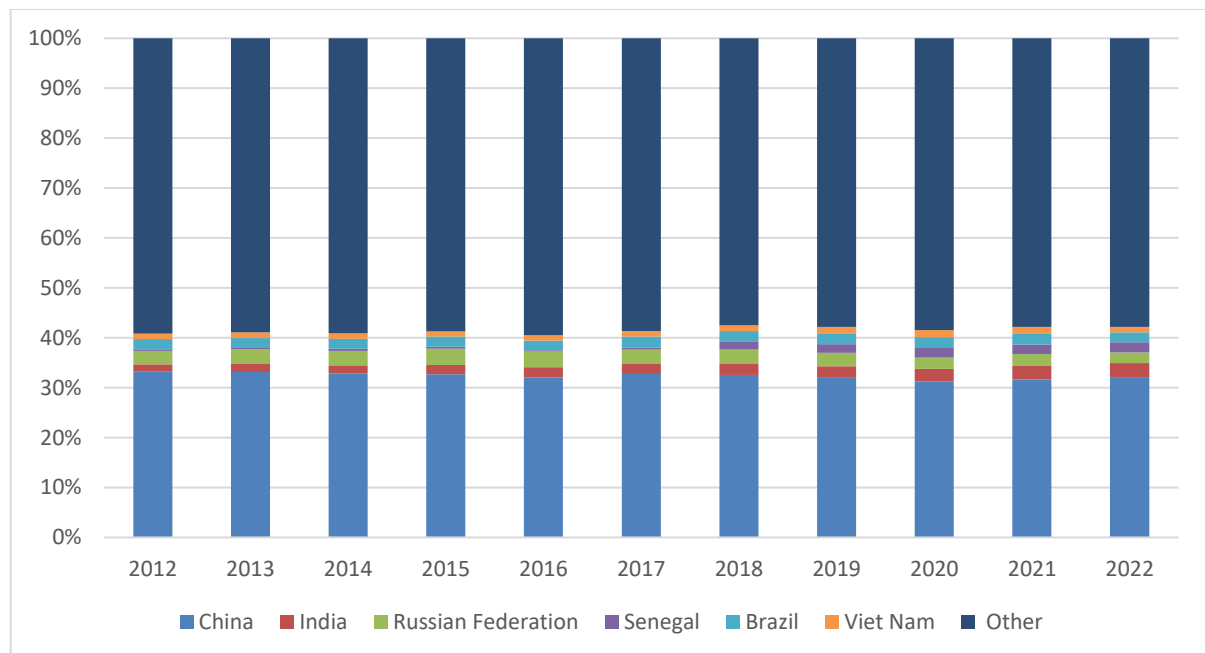
1.1. Production situation of some fruit and vegetable in the world

1.1.1. Watermelon production situation

The world's watermelon area decreased on average by 0.9%/year in the period 2012-2022, from 4.7 million hectares in 2012 to 4.3 million hectares in 2022.

In 2022 alone, there were about 120 watermelon-producing countries in the world, of which the top 5 countries producing the most watermelons were China, India, Russia, Senegal, and Brazil. The area of these five countries has always accounted for 39.4% to 41.4% of the world's total watermelon area in the period 2012-2022. Vietnam's watermelon area ranked 12th (accounting for 1.0% - 1.4% market share during this period).

Figure 1: Structure of world watermelon production area, 2012-2022

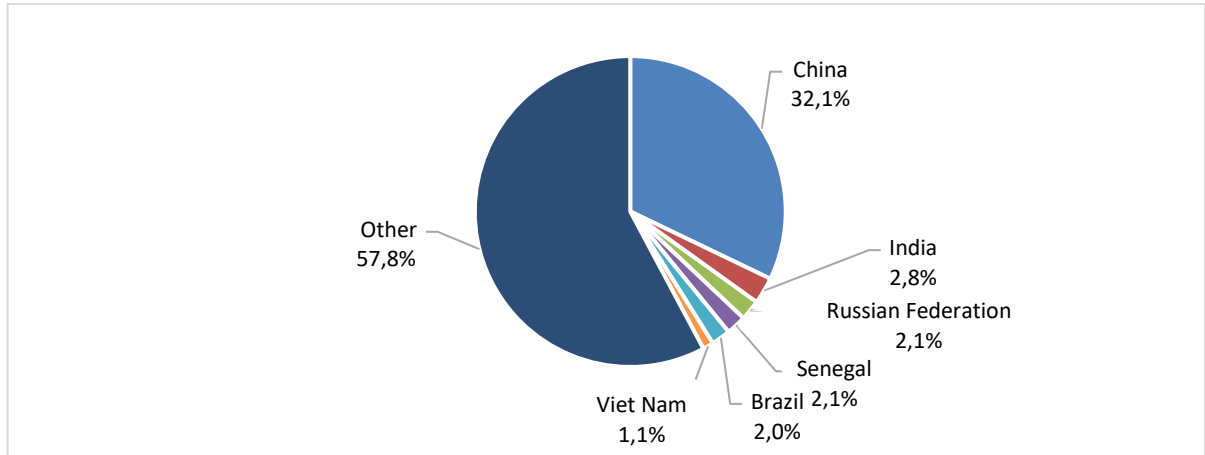


Source: FAOSTAT

The watermelon growing area of the top 5 countries growing the most in the world in 2022 was China with 1.4 million hectares, accounting for 32.1% of the world's watermelon area; India reached 120.0 thousand hectares, accounting for 2.8%; Russia reached 91 thousand hectares, accounting for 2.1%; Senegal reached 89.6 thousand hectares, accounting for 2.1%; Brazil accounted for 2.0% and Vietnam ranked 12th with 1.1% market share.



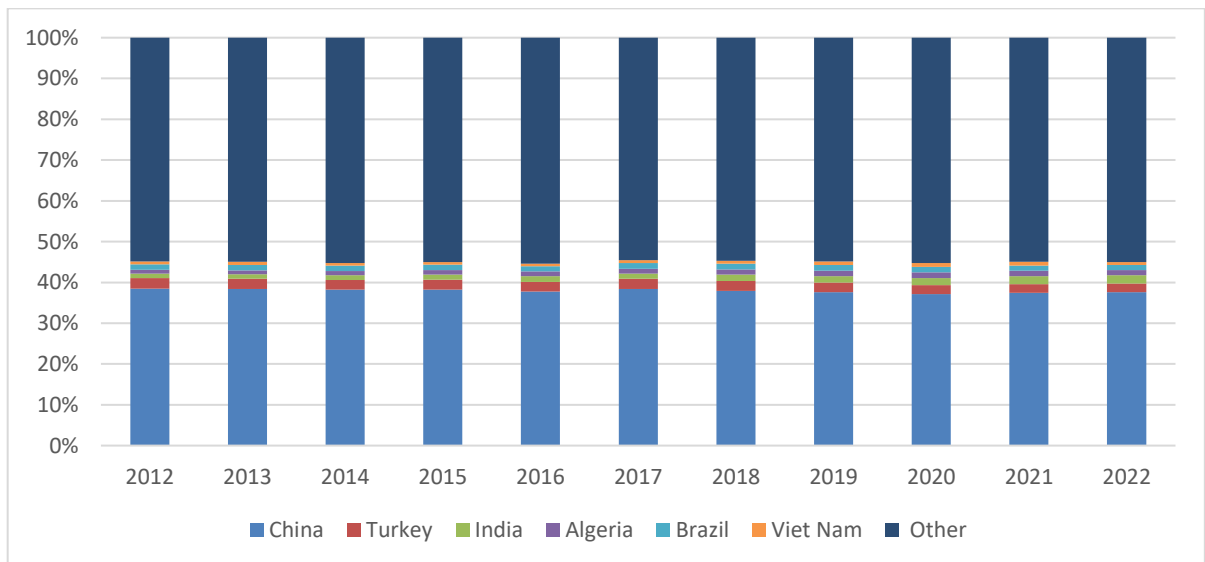
Figure 2: Structure of world watermelon production area in 2022



Source: FAOSTAT

Meanwhile, world watermelon production increased by an average of 0.2%/year in the period 2012-2022, from 156.7 million tons in 2012 to 160.5 million tons in 2022. Top 5 countries with the largest watermelon production in the world in 2022 were China, Turkey, India, Algeria, and Brazil. The watermelon output of these 5 countries has always accounted for 43.8% - 44.8% of the world's watermelon output. Vietnam's watermelon output has always accounted for 0.7%-0.9% during this period.

Figure 3: Structure of world watermelon production, 2012-2022



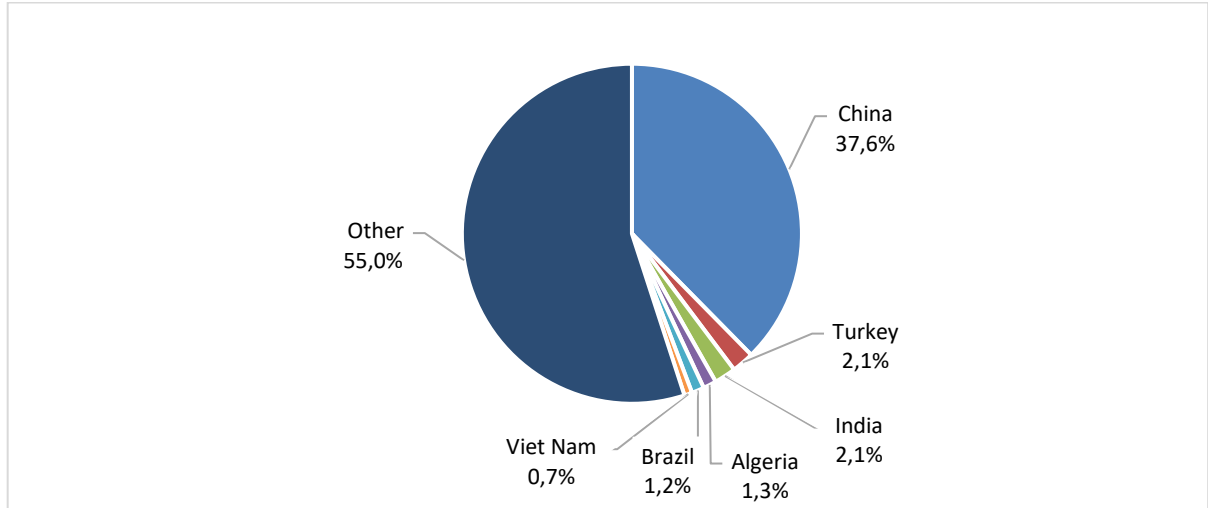
Source: FAOSTAT

In 2022, the watermelon output of the Top 5 countries growing the most in the world was China, accounting for 37.6% of world watermelon production, Turkey accounting for



2.1%, India accounting for 2.1%, Algeria accounting for 1.3%, Brazil accounting for 1.2%, and Vietnam ranked 12th with 0.7%.

Figure 4: Structure of world watermelon production in 2022

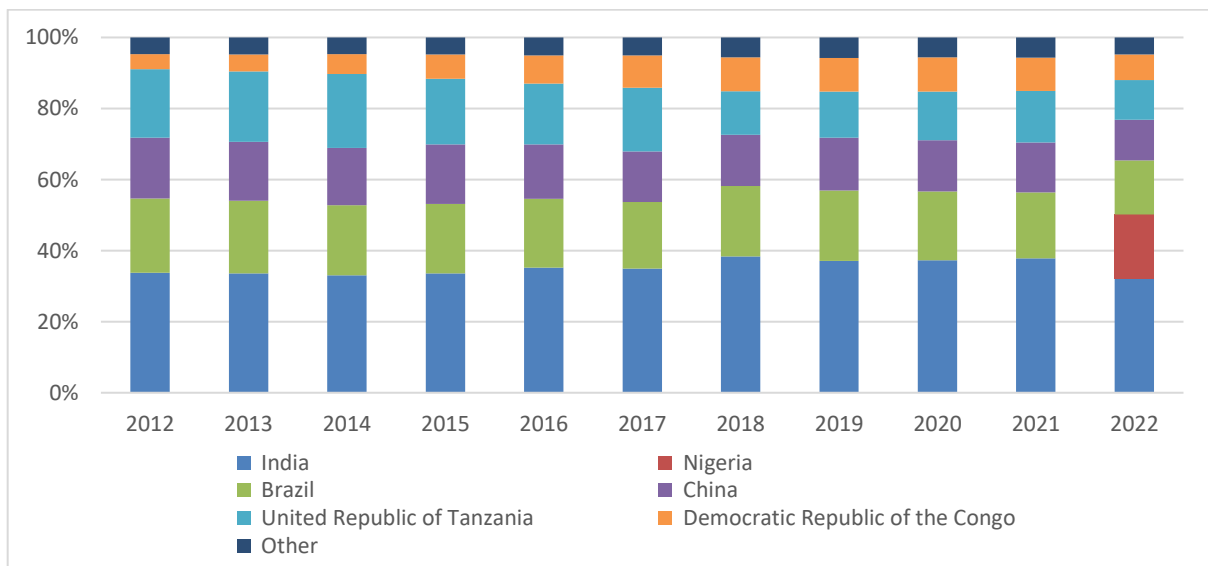


Source: FAOSTAT

1.1.2. Banana production situation

The world banana area increased on average by 0.9%/year in the period 2012-2022, from 5.7 million hectares in 2012 to 6.3 million hectares in 2022. The top 5 countries producing the most bananas in the world included India, Nigeria, Brazil, China, and Tanzania.

Figure 5: Structure of world banana production area, 2012-2022

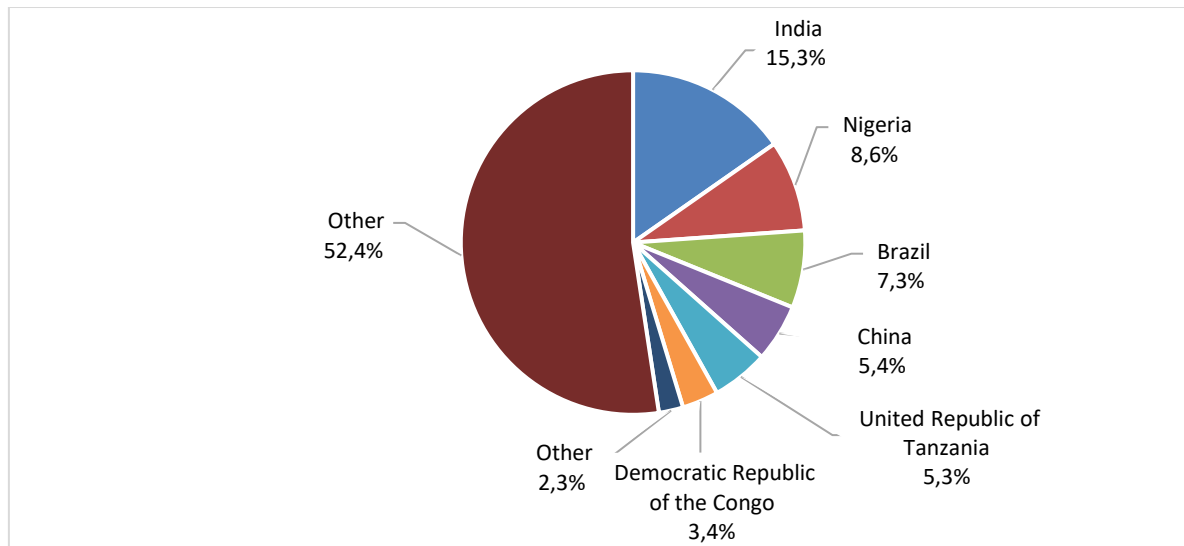


Source: FAOSTAT



In 2022, India's banana area reached 963 thousand hectares, accounting for 15.3% of the world's total banana area, followed by Nigeria (reaching 540.4 thousand hectares, accounting for 8.6%), Brazil (reaching 457.9 thousand hectares, accounting for 7.3%), China (reaching 341.3 thousand hectares, accounting for 5.4%), Tanzania (reaching 335.7 thousand hectares, accounting for 5.3%) and Vietnam ranked 14th (accounting for 2.3%).

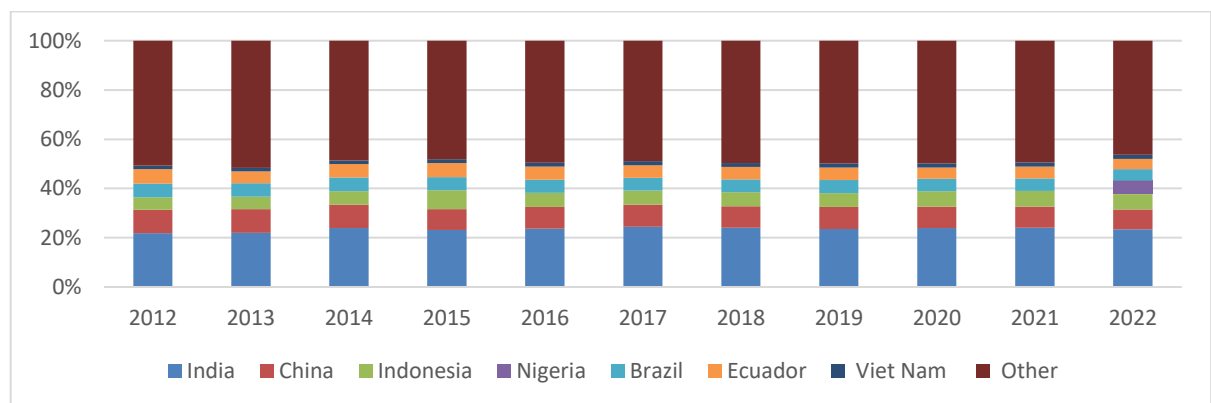
Figure 6: Structure of world banana area in 2022



Source: FAOSTAT

World banana production increased by an average of 1.9%/year in the period 2012-2022, from 121.6 million tons in 2012 to 147.2 million tons in 2022. The top 5 countries with the largest banana production in the world were India, China, Indonesia, Nigeria, and Brazil.

Figure 7: Structure of world banana production, 2012-2022



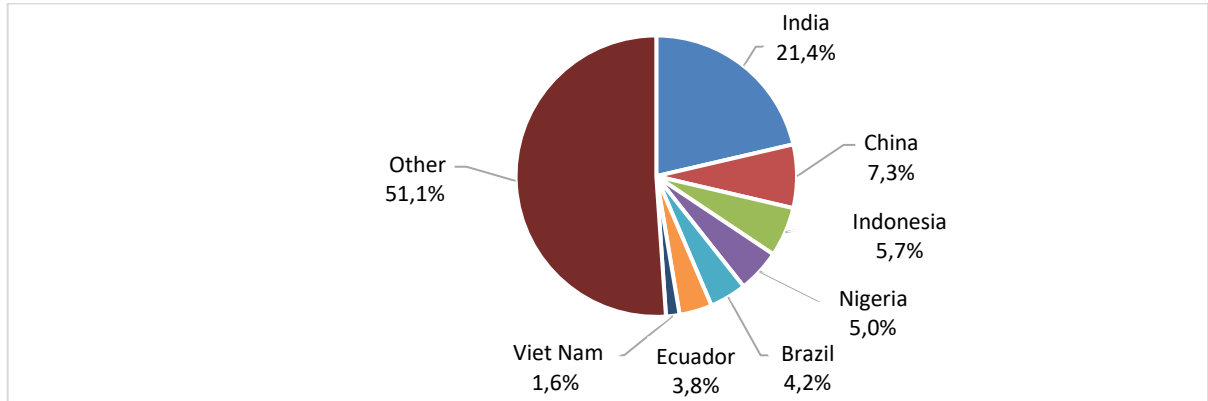
Source: FAOSTAT

In 2022, India's banana production reached 34.5 million tons, accounting for 23.5% of the world's total banana production, followed by China with 11.8 million tons (accounting



for 8.0%), Indonesia with 9.2 million tons (accounting for 6.3%), Nigeria with 8.0 million tons (accounting for 5.4%), Brazil (accounting for 4.7%), Ecuador (accounting for 4.1%) and Vietnam ranked 13th. (accounting for 1.7%).

Figure 8: Structure of world banana production in 2022



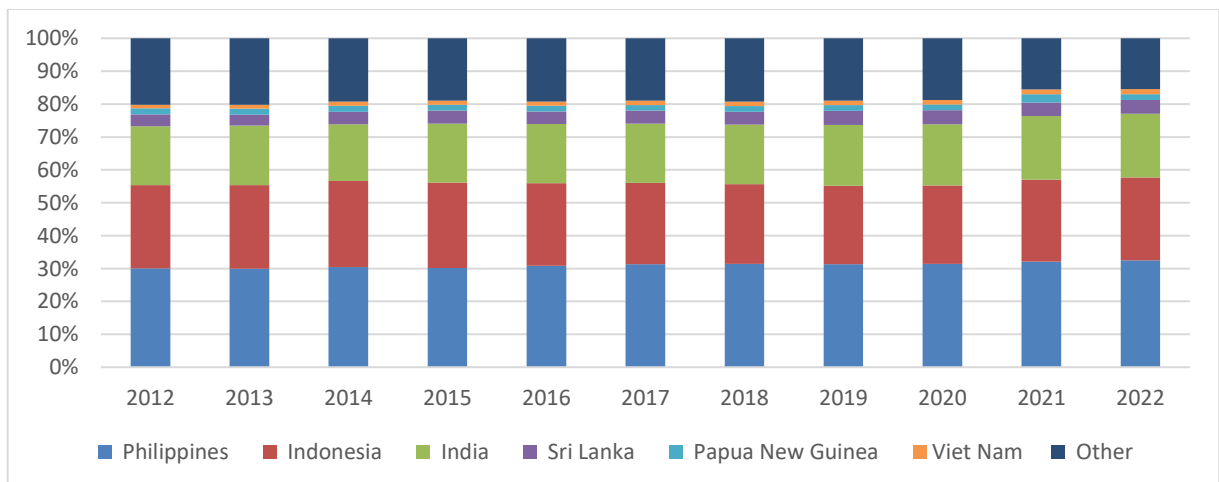
Source: FAOSTAT

1.1.3. Coconut production situation

The world coconut area decreased on average by 0.7%/year in the period 2012-2022, from 11.9 million hectares in 2012 to 11.1 million hectares in 2022.

In 2022, there were about 85 coconut-producing countries in the world, of which the Top 5 countries producing the most coconuts were the Philippines, Indonesia, India, Sri Lanka, and Papua New Guinea. The coconut growing area of these five countries has always accounted for 78.6% to 83.0% of the total world coconut growing area. Vietnam's coconut area has always accounted for 1.1% to 1.6% of the total coconut area in the world.

Figure 9: Structure of world coconut production area, 2012-2022

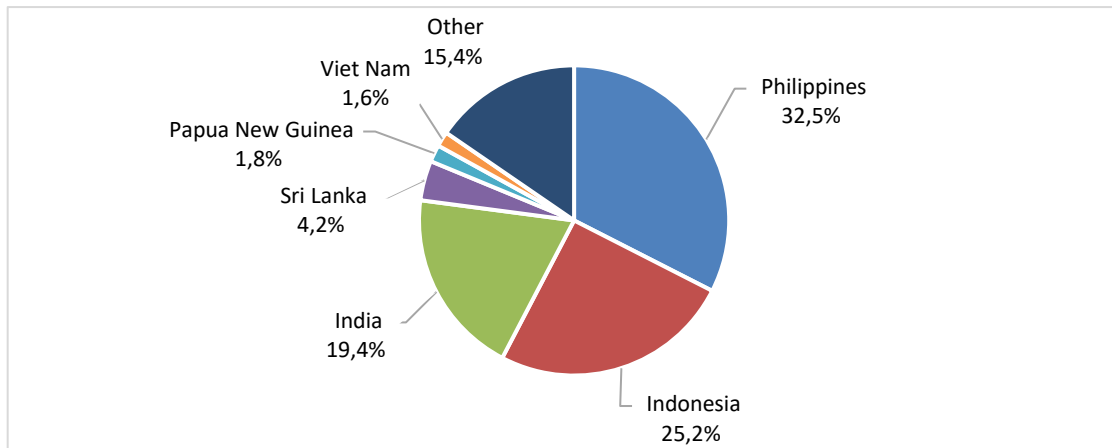


Source: FAOSTAT



In 2022, the largest coconut growing area in the world was: Philippines reaching 3.6 million hectares, accounting for 32.5% of the world's coconut area, Indonesia reaching 2.8 million USD (accounting for 25.2%), India reached 2.2 million hectares (accounting for 19.4%), Sri Lanka (accounting for 4.2%), Papua New Guinea (accounting for 1.8%) and Vietnam ranked 7th (accounting for 1.6%).

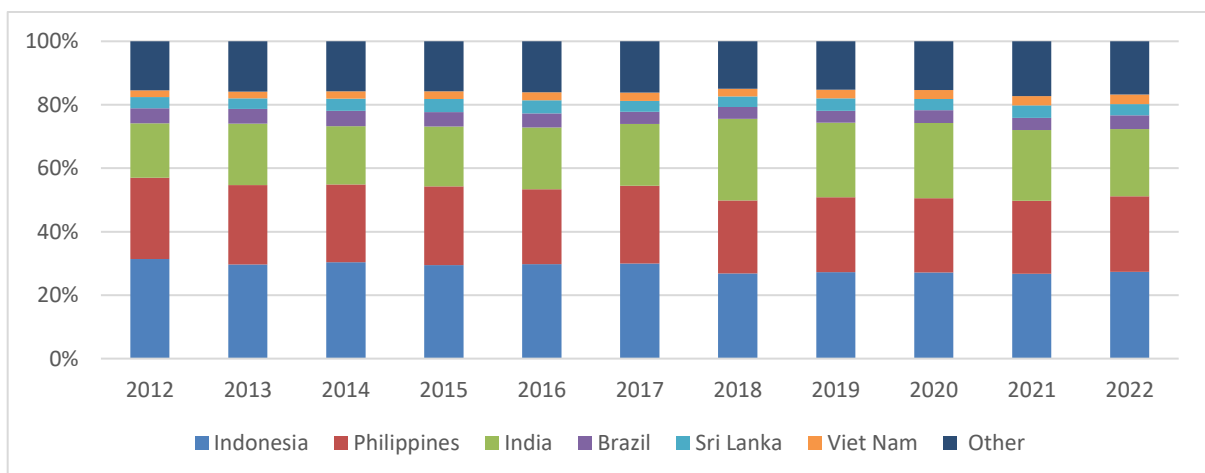
Figure 10: Structure of world coconut area in 2022



Source: FAOSTAT

World coconut production increased on average by 0.2%/year in the period 2012-2022, from 61.8 million tons in 2012 to 62.8 million tons in 2022. The top 5 countries with the most coconut production in the world were Indonesia, Philippines, India, Brazil, and Sri Lanka. The coconut output of the world's 5 largest producing countries has always accounted for 79.8% to 82.6% of the total world coconut output. Vietnam's coconut output has accounted for 2.1% to 3.1% of the market share.

Figure 11: Structure of world coconut production, 2012-2022

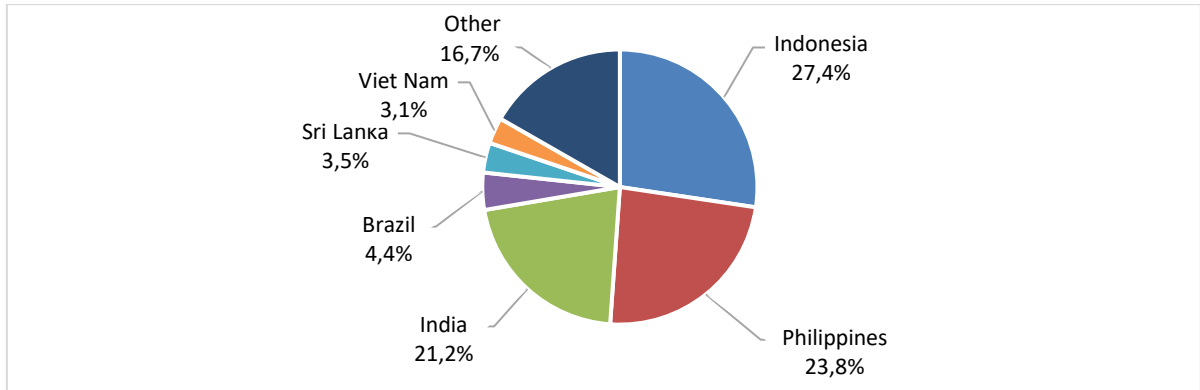


Source: FAOSTAT



In 2022, the proportion of coconut production of the world’s leading producers of coconuts was as follows: Indonesia, 27.4%, the Philippines, accounting for 23.8%, India, accounting for 21.2%, Brazil, accounting for 4.4%, and Sri Lanka, accounting for 3.5%. Vietnam's coconut production ranked 6th in the world (accounting for 3.1%).

Figure 12: Structure of world coconut production in 2022

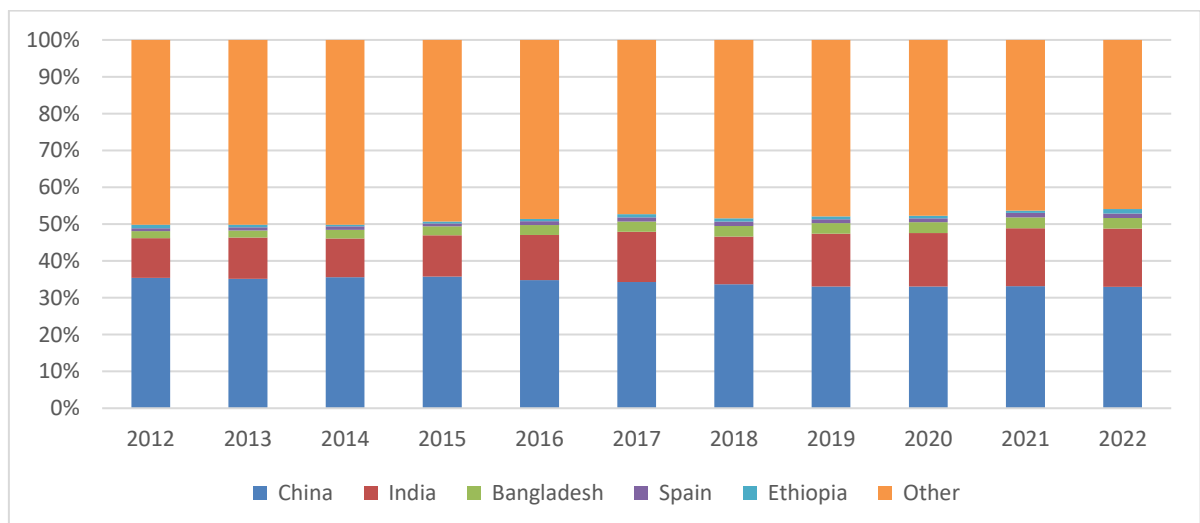


Source: FAOSTAT

1.1.4. Garlic production situation

There are currently over 100 countries and territories producing garlic. The world garlic area increased by an average of 1.0%/year in the period 2012-2022, from 2.2 million hectares in 2012 to 2.5 million hectares in 2022. In particular, the Top 5 garlic-producing countries in the world today are China, India, Bangladesh, Spain and Ethiopia. These five countries have always accounted for 49.8% to 54.0% of the total garlic growing area in the world during this period.

Figure 13: Structure of world garlic area, 2012-2022

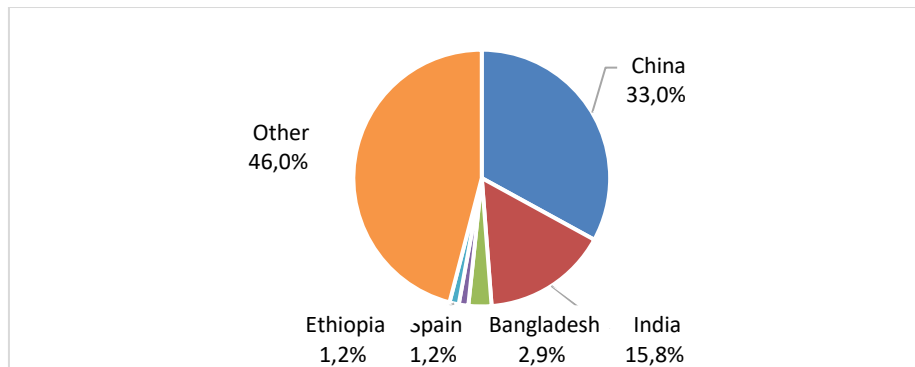


Source: FAOSTAT



In 2022, China's garlic area reached 820.5 thousand hectares, accounting for 33.0% of the world's total garlic area; followed by India with 393.0 thousand hectares (accounting for 15.8%), Bangladesh with 72.2 thousand hectares (accounting for 2.9%); Spain with 29.8 thousand hectares (accounting for 1.2%); Ethiopia with 29.1 thousand hectares (accounting for 1.2%).

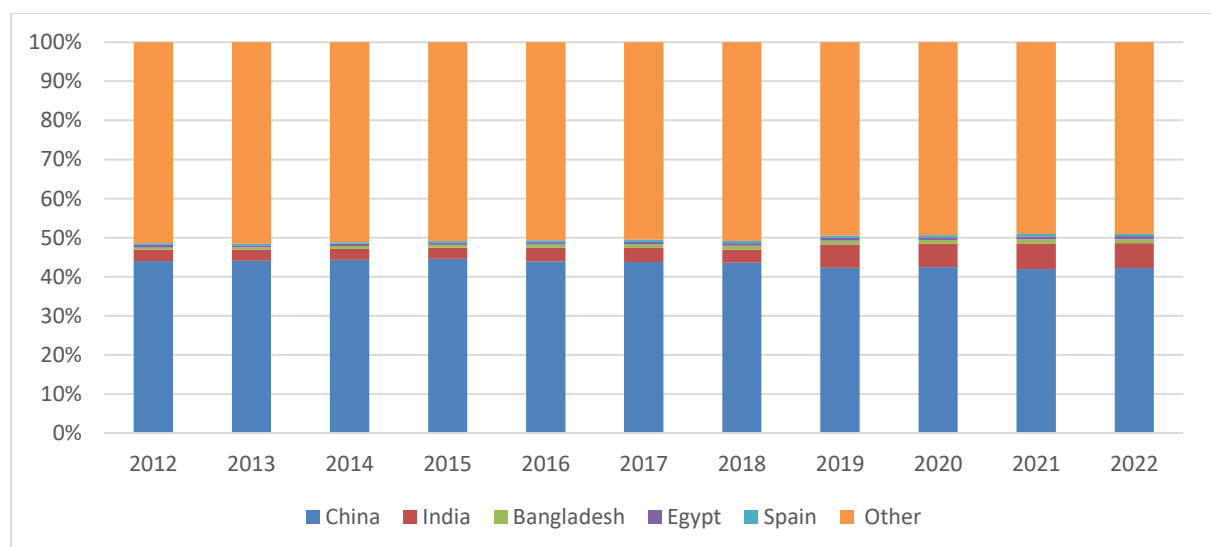
Figure 14: Structure of world garlic production area in 2022



Source: FAOSTAT

World garlic production increased by an average of 1.9%/year in the period 2012-2022, from 41.9 million tons in 2012 to 50.5 million tons in 2022. Top 5 countries with the largest garlic production in the world were China, India, Bangladesh, Egypt, and Spain. The garlic output of these 5 countries has always accounted for 48.4% to 51.0% of the world's total garlic output during this period. Among them, China was the country with the largest garlic production, accounting for 42.0% to 44.5% of the total world production.

Figure 15: Structure of world garlic production, 2012-2022

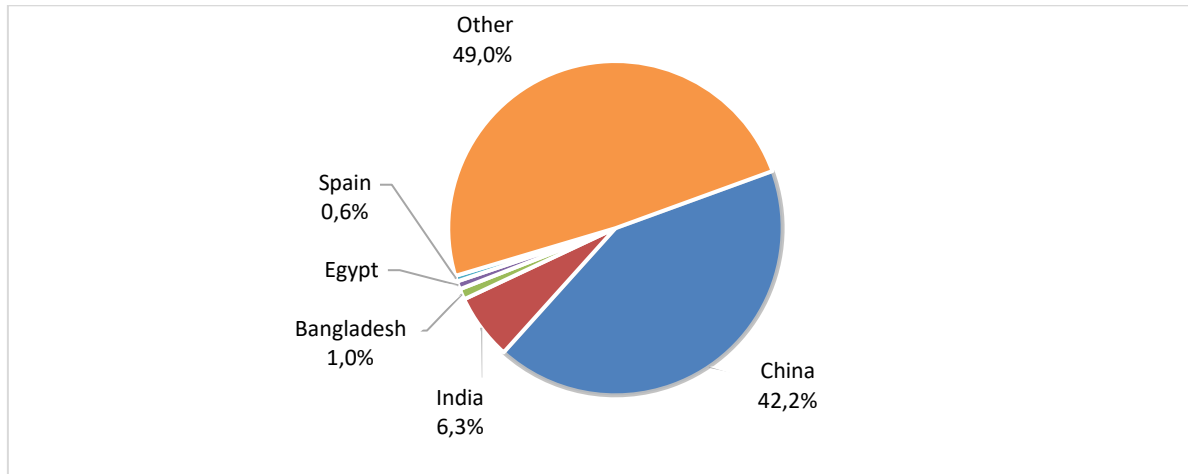


Source: FAOSTAT



In 2022, China's garlic production accounted for 42.2% of the total world garlic production, followed by India (accounting for 6.3%), Bangladesh (accounting for 1.0%), Egypt (accounting for 0.8%), and Spain (0.6%).

Figure 16: Structure of world garlic production in 2022



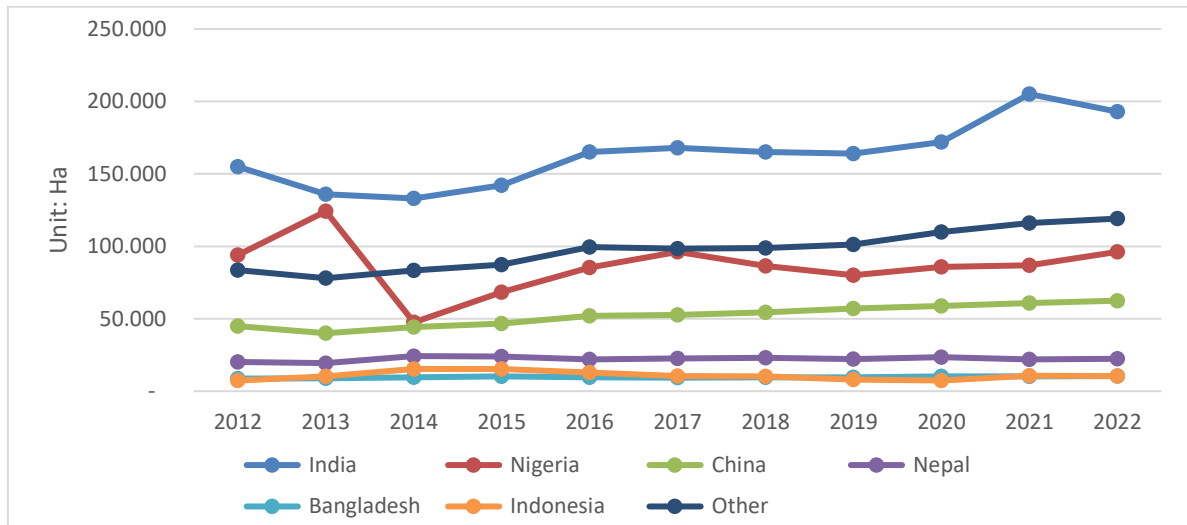
Source: FAOSTAT

1.1.5. Ginger production situation

India is the country with the largest ginger area in the world. Its ginger growing area increased by an average of 2.2%/year, from 155.0 thousand hectares in 2012 to 194 thousand hectares in 2022. Next is Nigeria (with an average growth of 0.2%/year, from 94 thousand hectares to 96 thousand hectares); China (with an average growth of 3.3%/year, from 45,000 hectares to 62,458 hectares); Nepal (with an average growth of 1.0%/year, from 20,256 hectares to 22,441 hectares); Bangladesh (with an average growth of 1.8%/year, from 8,704 hectares to 10,429 hectares); Indonesia (with an average growth of 3.6%/year, from 7,316 hectares to 10,409 hectares); etc.



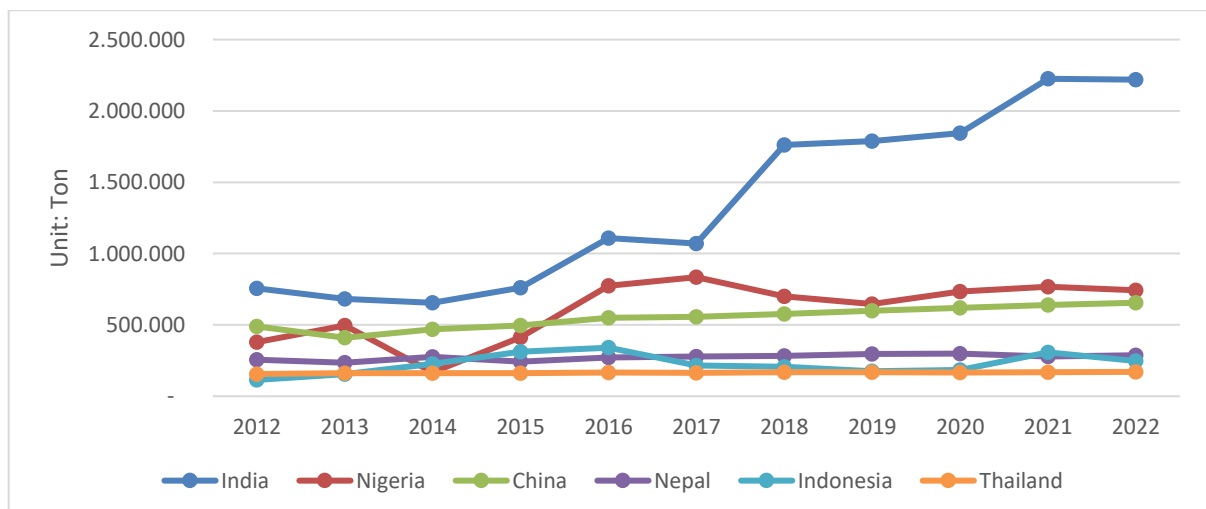
Figure 17: Changes in ginger production area in some countries around the world, 2012-2022



Source: FAOSTAT

India is also the country with the largest ginger production in the world. Its ginger production increased by an average of 11.4% per year, from 756,000 tons in 2012 to 2.2 million tons in 2022. Next is Nigeria (with an average growth of 6.9%/year, from 380,000 tons to 743,527 tons); China (with an average growth of 3.0%/year, from 490,000 tons to 655,452 tons); Nepal (with an average growth of 1.2%/year, from 255,208 tons to 287,813 tons); Indonesia (with an average growth of 8.0%/year, from 114,538 tons to 247,455 tons); Thailand (with an average growth increased by 0.9%/year, from 156,068 tons to 170,887 tons); etc.

Figure 18: Fluctuations in ginger output in some countries around the world, 2012-2022



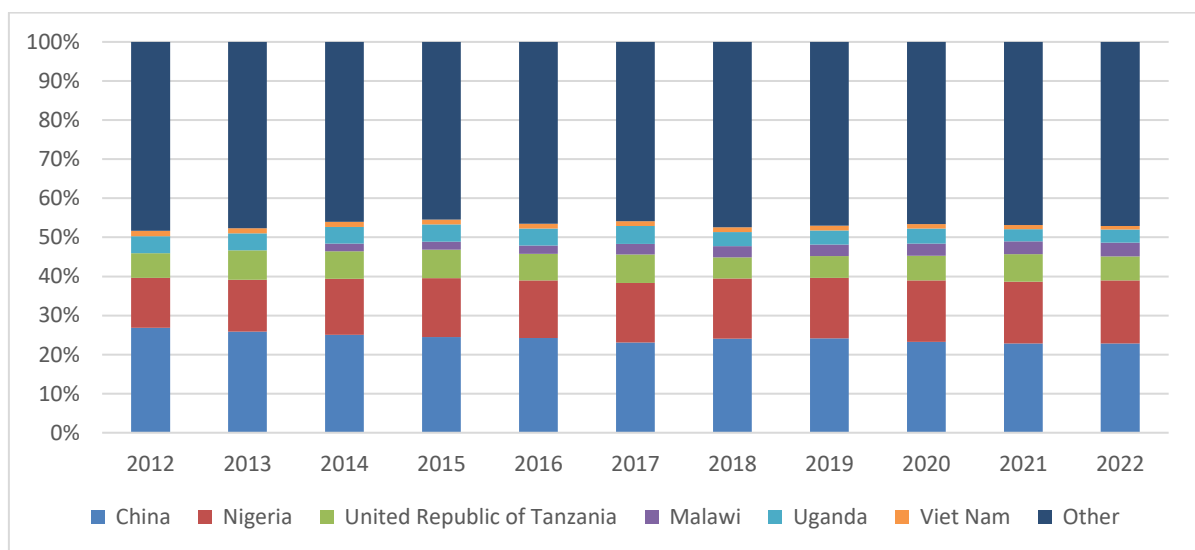
Source: FAOSTAT



1.1.6. Situation of sweet potato production

The world sweet potato area decreased by an average of 1.0%/year in the period 2012-2022, from 10.4 million hectares in 2012 to 9.41 million hectares in 2022. In the world, there are currently about 110 countries and territories with sweet potato growing areas . Among them, the Top 5 largest sweet potato producers in the world are China, Nigeria, Tanzania, Malawi, and Uganda. The sweet potato growing area of these five countries has always accounted for 50.3% to 53.3% of the total sweet potato growing area in the world during this period.

Figure 19: Structure of world sweet potato area, 2012-2022

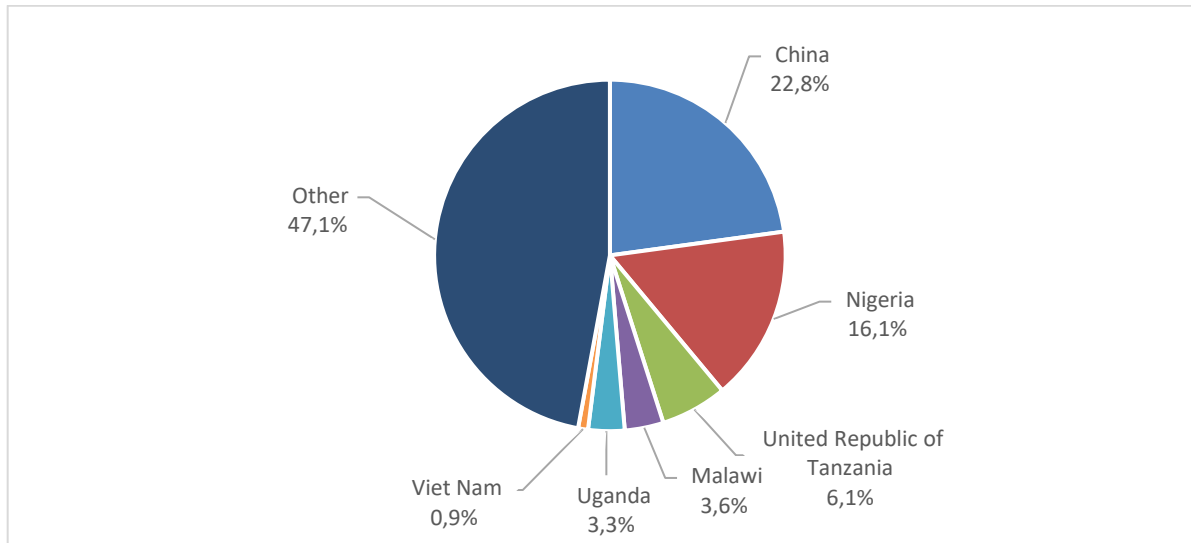


Source: FAOSTAT

In 2022 alone, China's sweet potato area reached 2.15 million hectares, accounting for 22.8% of the world's total sweet potato area; followed by Nigeria (reaching 1.5 million hectares, accounting for 16.1%); Tanzania (reaching 576.2 thousand hectares, accounting for 6.1%); Malawi (reaching 335.8 thousand hectares, accounting for 3.6%); Uganda (reaching 314.3 thousand, accounting for 3.3%). Vietnam's sweet potato growing area ranked 13th in the world, accounting for about 0.9%.



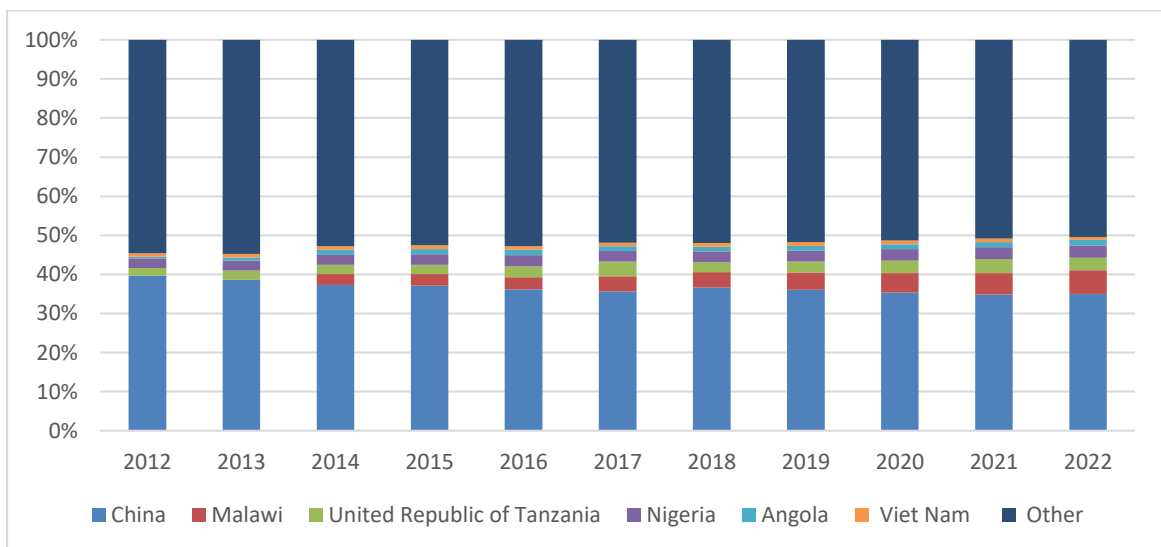
Figure 20: Structure of world sweet potato area in 2022



Source: FAOSTAT

The world sweet potato production decreased by an average of 1.2%/year in the period 2012-2022, from 150.9 million tons in 2012 to 133.2 million tons in 2022. The top 5 countries with the largest sweet potato production in the world were China, Malawi, Tanzania, Nigeria and Angola. The sweet potato output of these five countries has always accounted for 44.3% to 48.8 % of the world's total sweet potato output during this period. Among them, China was the country with the largest sweet potato production, accounting for 34.8% - 39.6% of the total world production.

Figure 21: Structure of world sweet potato production, 2012-2022

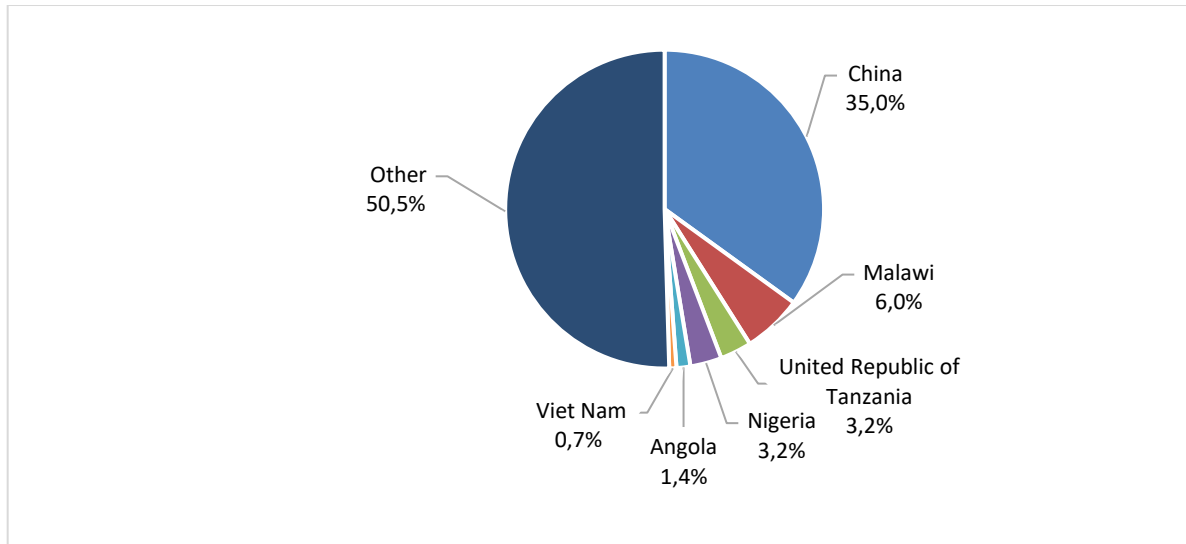


Source: FAOSTAT



In 2022 alone, China's sweet potato output reached 46.6 million tons, accounting for 35.0% of the total world sweet potato output, followed by Malawi with 8.1 million tons (accounting for 6.0%); Tanzania with 4.3 million tons (accounting for 3.2%); Nigeria with 4.2 million tons (accounting for 3.2%); and Angola with 1.9 million tons (accounting for 1.4%). Vietnam's sweet potato output ranked 12th in the world, accounting for 0.7%.

Figure 22: Structure of world sweet potato production in 2022



Source: FAOSTAT

1.2. Situation of fruit and vegetable production in Vietnam

1.2.1. General production situation

According to a report by the Department of Crop Production - Ministry of Agriculture and Rural Development, in 2023, the area of vegetables and beans is estimated to reach over 1.12 million hectares, with an estimated output of 19.2 million tons, an increase of 3.0% compared to the previous year. The area of fruit trees reached 1,250 thousand hectares, an increase of 28.6 thousand hectares, up 2.3% compared to the same period in 2022.

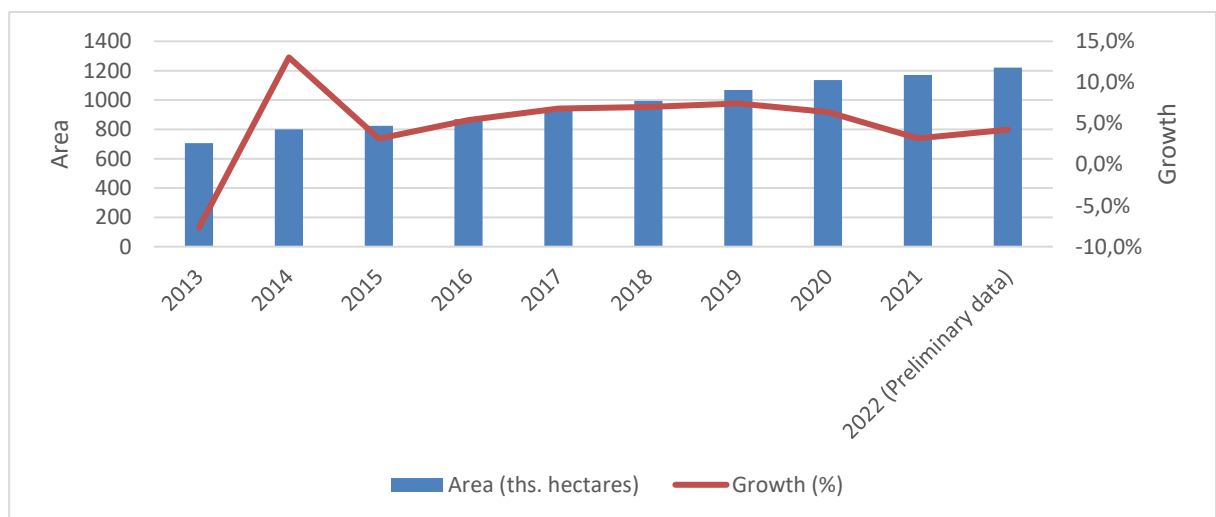
The areas of some main products were as follows: mango reached 117.0 thousand hectares, an increase of 1.12%; banana reached 159 thousand hectares, an increase of 1.12%; dragon fruit reached 52.8 thousand hectares, down 3.6%; durian reached 149.0 thousand hectares, an increase of 32%; jackfruit reached 83.0 thousand hectares, an increase of 2.9%; orange reached 85 thousand hectares, decreased by 6.3%; grapefruit reached 108.0 thousand hectares, down 1.8%; cashew reached 314.3 thousand hectares, down 2.4% %; pepper 112.3 thousand hectares, down 6.1%; rubber reached 910.2 thousand hectares, down 0.9%; coffee reached 715.3 thousand hectares, an increase of 0.8%; tea buds reached 123.2 thousand hectares, an increase of 0.6%.



+ Output of some main products were as follows: mango reached 1,015 thousand tons, up 2.0% compared to 2022; bananas reached 2,535 thousand tons, an increase of 1.07%; dragon fruit reached 1,200 thousand tons, down 6.6%; durian reached 1,200 thousand tons, an increase of 39%; jackfruit reached 938.0 thousand tons, an increase of 3.4%; oranges reached 1,700 thousand tons, down 5.7%; grapefruit reached 1,105 thousand tons, down 3.1%; cashew nuts reached 345.2 thousand tons, an increase of 1.02%; pepper reached 257.7 thousand tons, down 5.3%; rubber reached 1293.3 thousand tons, down 3.4%; coffee reached 1893.3 thousand tons, down 3.1%; tea buds reached 1,094.1 thousand tons, down 0.6%.

The area of fruit trees in the whole country and regions has generally tended to continuously increase in recent years. According to the General Statistics Office, the area of fruit trees in 2022 reached 1.22 million hectares, an increase of 4.3% compared to 2021. In the period 2013-2022, the compound annual growth rate of the fruit growing area was 6.2%/year.

Figure 23: Fruit growing area in Vietnam, 2013 - 2022



Source: GSO

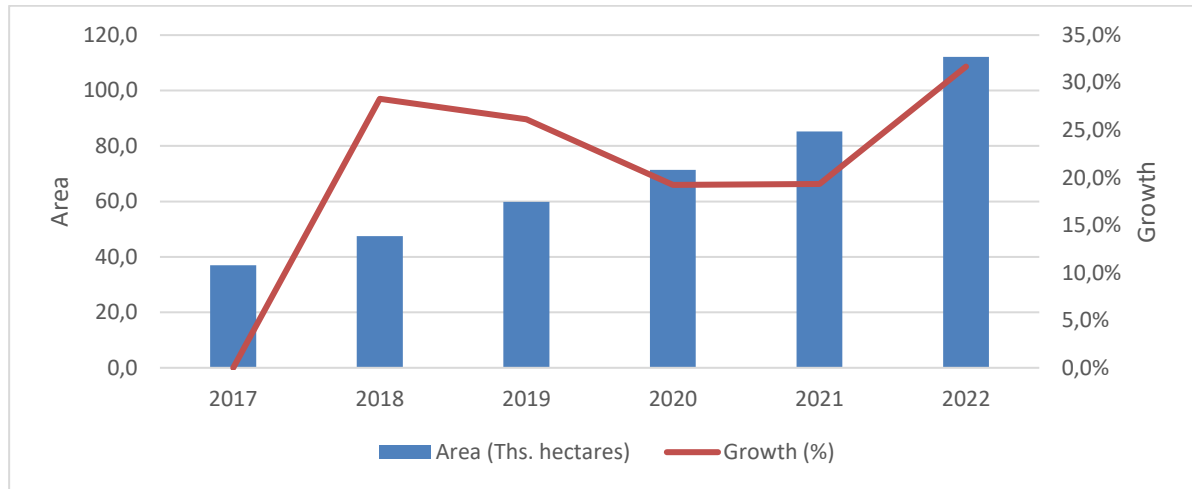
1.2.2. Production situation of some main crops

(i) Durian production

Vietnam's durian area has grown strongly in recent years, with a compound annual growth rate of 24.8%/year in the period 2017-2022, from 37.0 thousand hectares in 2017 to 112.3 thousand hectares in 2022.



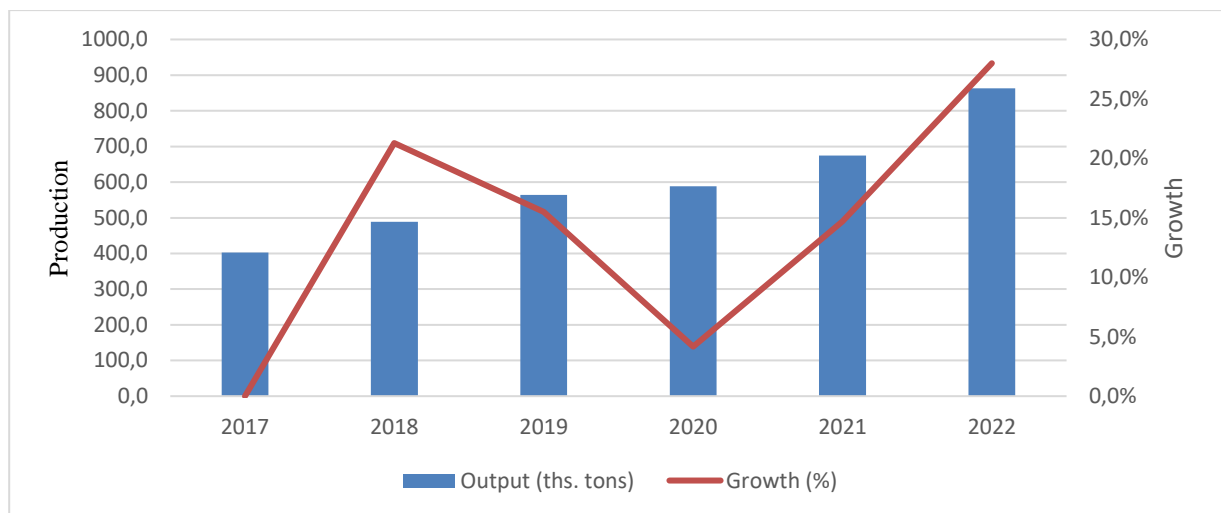
Figure 24: Vietnam’s durian area in the period 2017-2022



Source: Ministry of Agriculture and Rural Development

Durian output nationwide has also grown strongly in recent years, with a compound annual growth rate of 16.5%/year, from 403 thousand tons in 2017 to 863.3 thousand tons in 2022.

Figure 25: Vietnam’s durian output in the period 2017-2022



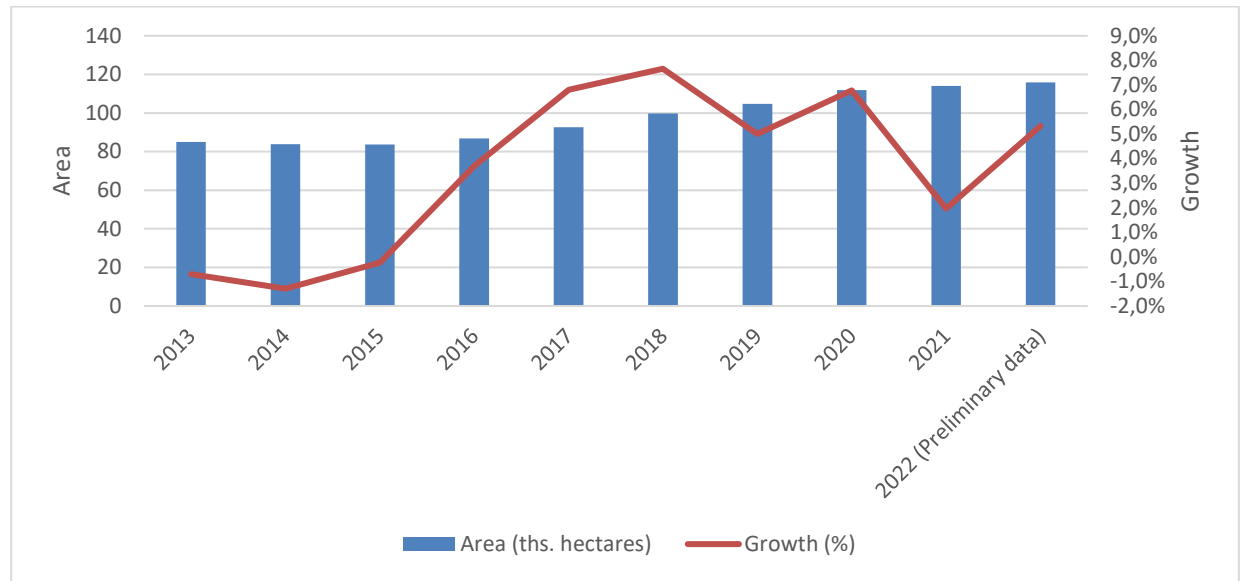
Source: Ministry of Agriculture and Rural Development

(ii) Mango production

Mango area has tended to grow positively over the past many years. In 2013, the mango area was only about 85 thousand hectares, but by 2022, it reached 115.9 thousand hectares. The compound annual growth rate reached 3.5%/year in the period 2013-2022.



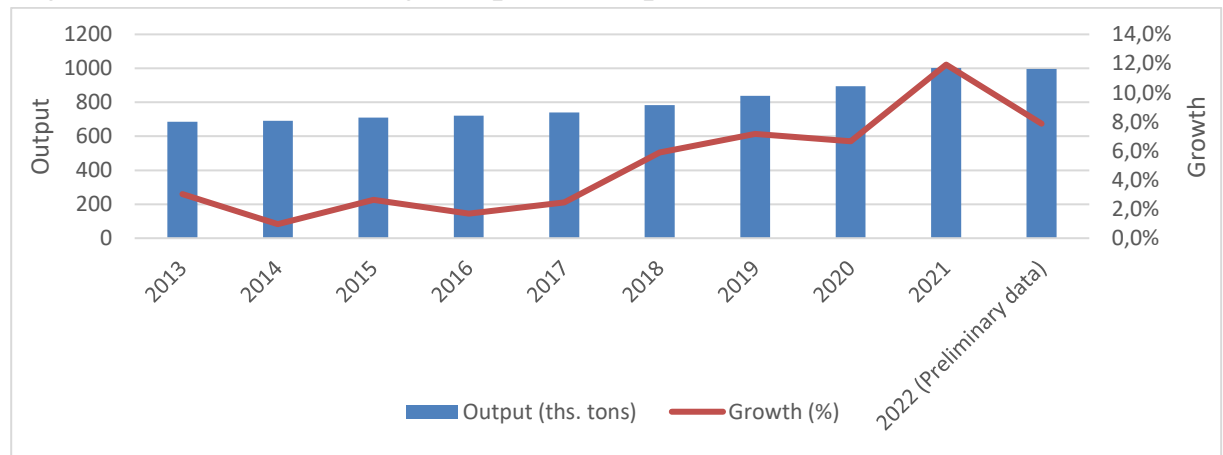
Figure 26: Vietnam’s mango area in the period 2013 - 2022



Source: GSO

Thanks to advances in production, mango output increased quite steadily over the years in the period 2012-2022, averaging 4.2%/year, from 684.9 thousand tons in 2013 to 996 thousand tons in 2022.

Figure 27: Vietnam’s mango output in the period 2013 - 2022



Source: GSO

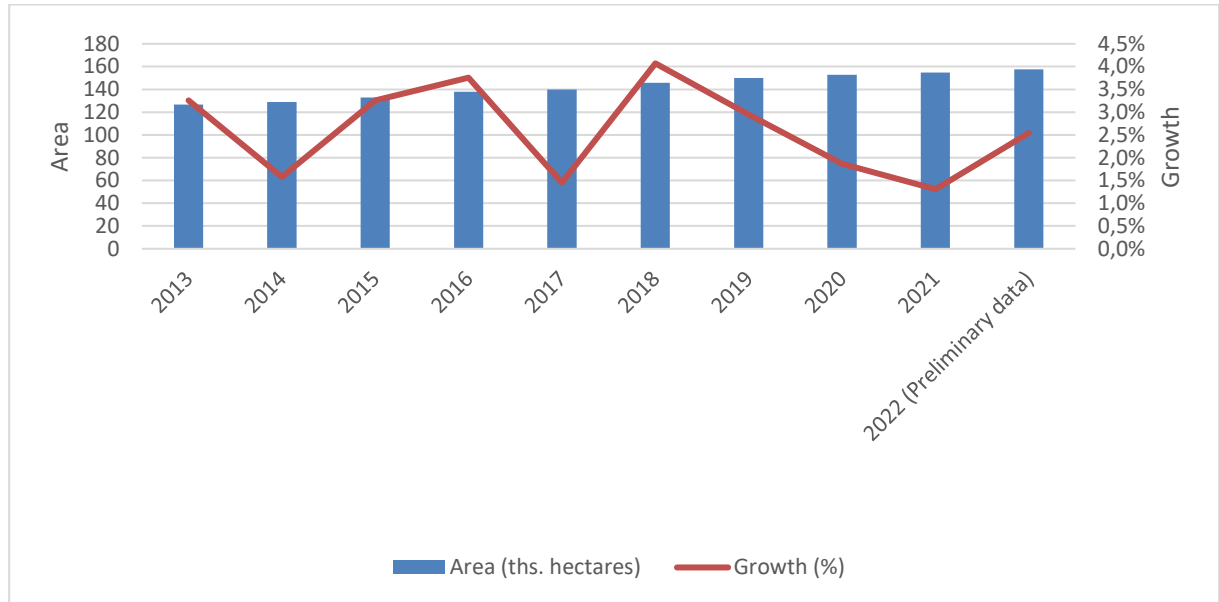
(iii) Banana production

Banana is one of the most popular fruit trees. It is easy to grow, easy to consume, has high economic value and great export potential in Vietnam. Thanks to its high profit, the area of this crop has been increasing rapidly in recent years. According to data of the General Statistics Office, the compound annual growth rate of banana growing area in the country



reached 2.4%/year in the period 2013-2022, from 126.8 thousand hectares in 2013 to 157.6 thousand hectares in 2022.

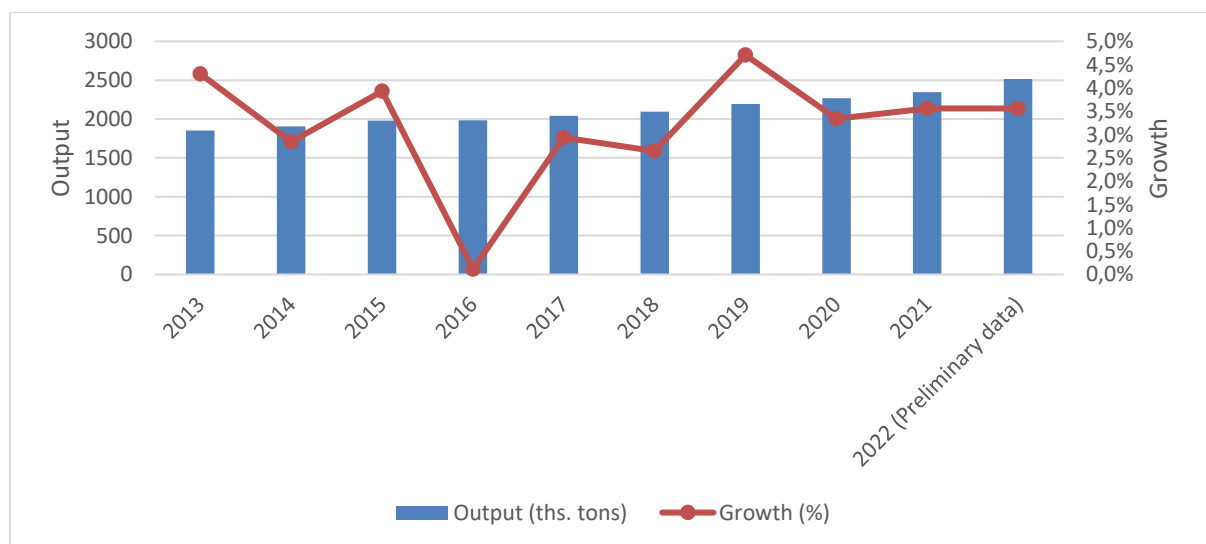
Figure 28: Vietnam’s banana area in the period 2013 - 2022



Source: GSO

Banana output nationwide increased by an average of 3.4%/year in the period 2013-2022, from 1,853.3 thousand tons in 2013 to 2,514.8 thousand tons in 2022.

Figure 29: Vietnam’s banana output in the period 2013 - 2022



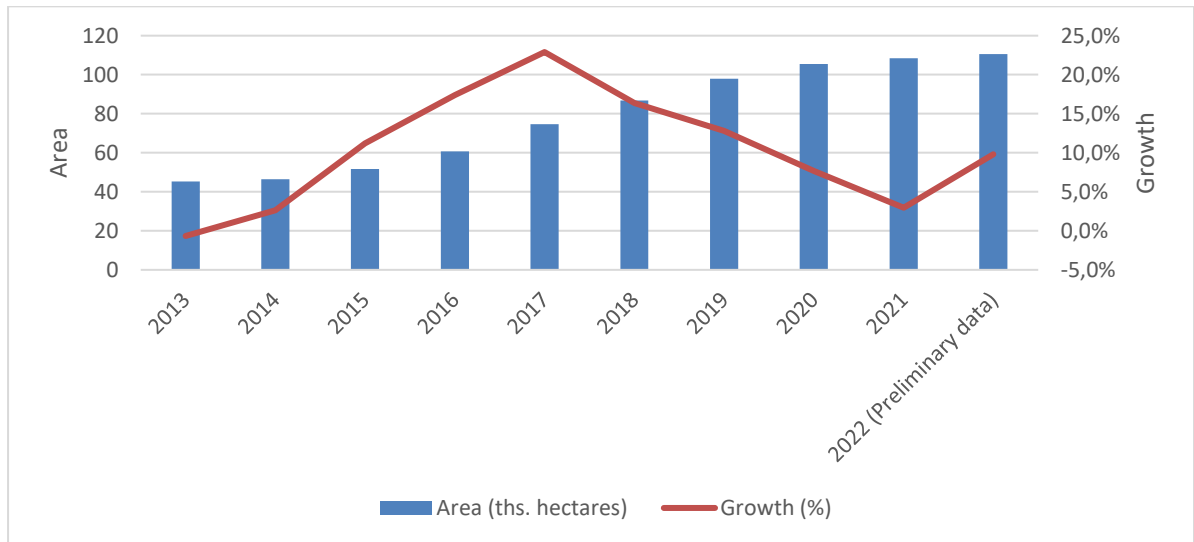
Source: GSO



(iv) Grapefruit production situation

Vietnam’s grapefruit area has grown strongly in recent years, averaging 10.4%/year in the period 2013-2022, from 45.3 thousand hectares in 2013 to 110.5 thousand hectares in 2022.

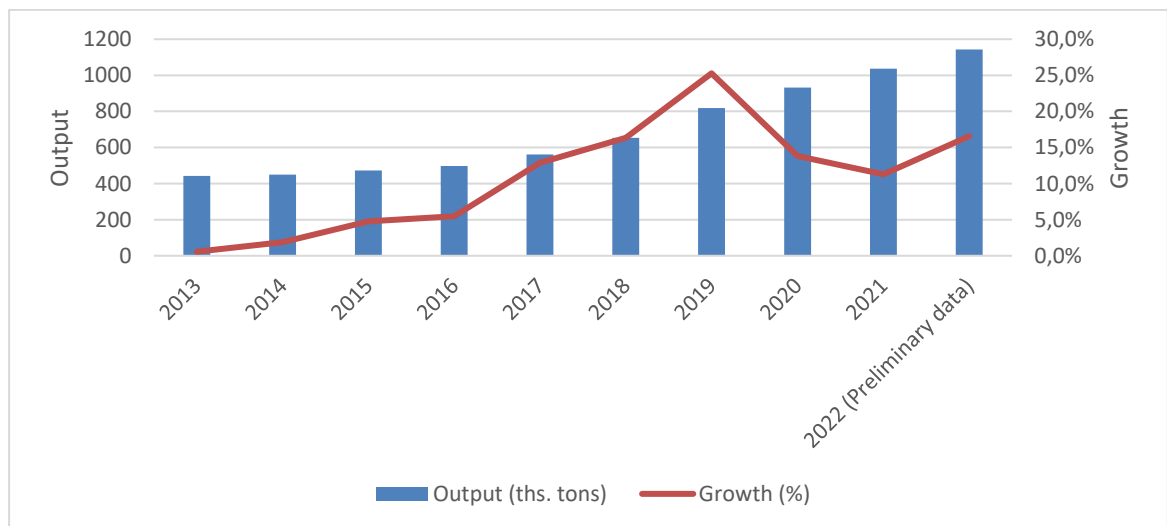
Figure 30: Vietnam's grapefruit area in the period 2013 - 2022



Source: Statistical yearbook

Grapefruit production in the country is growing strongly, averaging 11.1%/year in the period 2013-2022, from 442.1 thousand tons in 2013 to 1,142.6 thousand hectares in 2022.

Figure 31: Vietnam's grapefruit output in the period 2013 - 2022



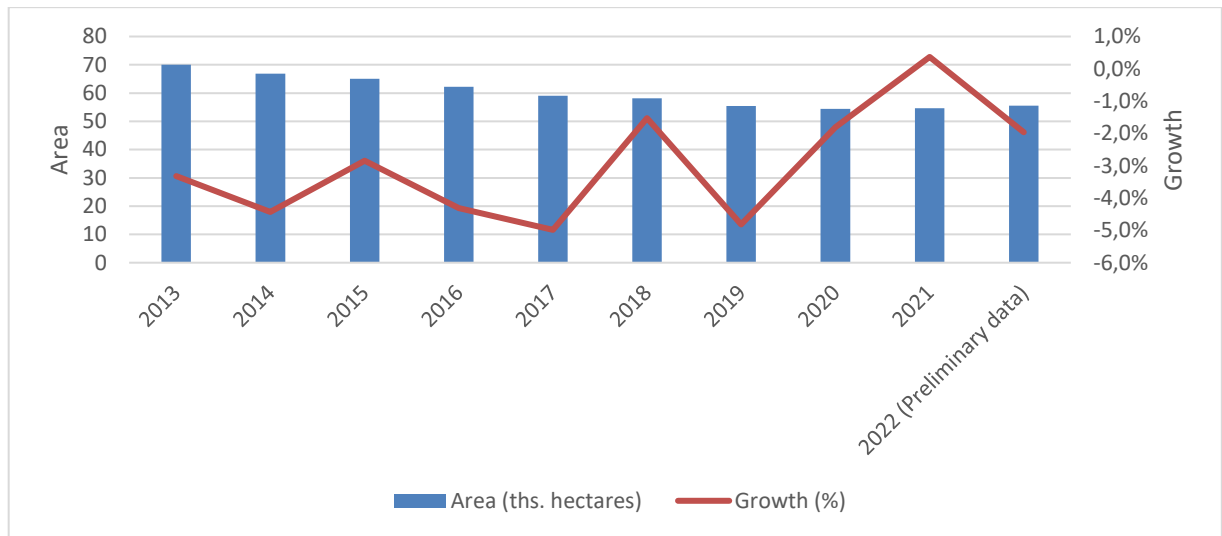
Source: Statistical yearbook



(v) Lychee production situation

In the period 2013-2022, the compound annual growth rate of lychee production area in the country decreased by 2.4%/year, from 70.0 thousand hectares in 2013 to 50.5 thousand hectares in 2022.

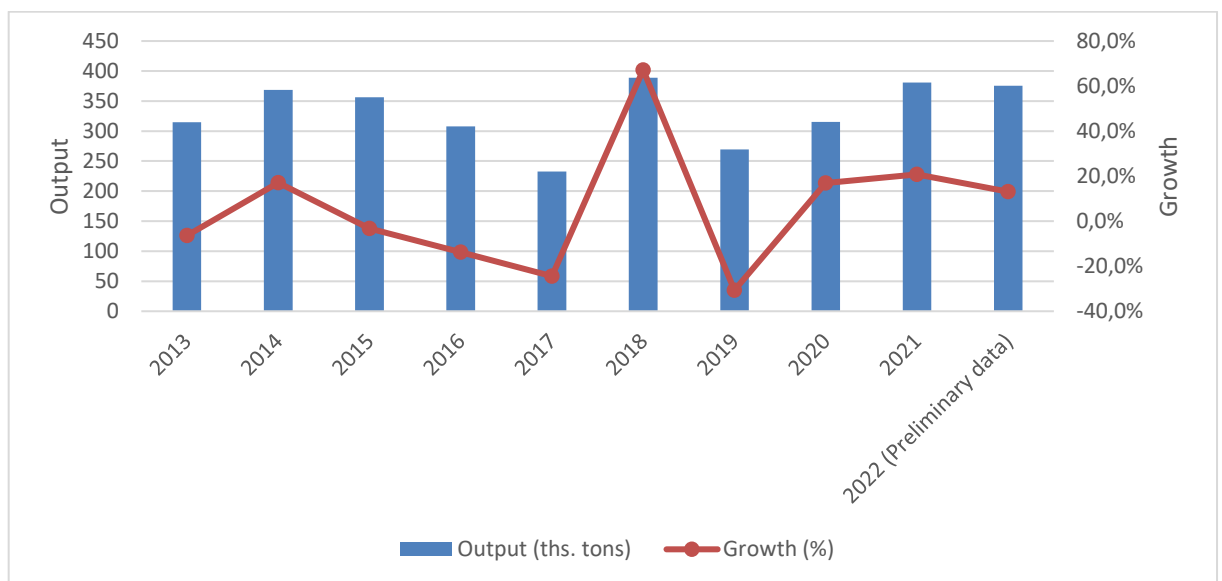
Figure 32: Vietnam's lychee area in the period 2013-2022



Source: GSO

Although the lychee area has tended to decrease, the output has tended to increase, averaging 2.0%/year, from 314.8 thousand tons in 2013 to 375.3 thousand tons in 2022.

Figure 33: Vietnam's lychee output in the period 2013-2022



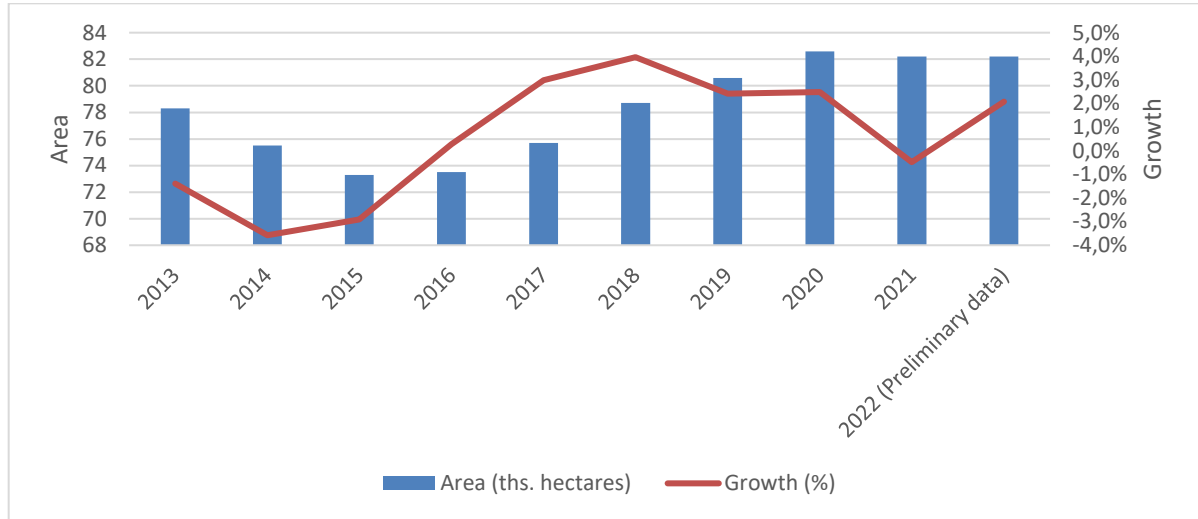
Source: GSO



(vi) Longan production situation

The country's longan area increased on average by 0.5%/year in the period 2013-2022, from 78.3 thousand hectares in 2013 to 82.2 thousand hectares in 2022.

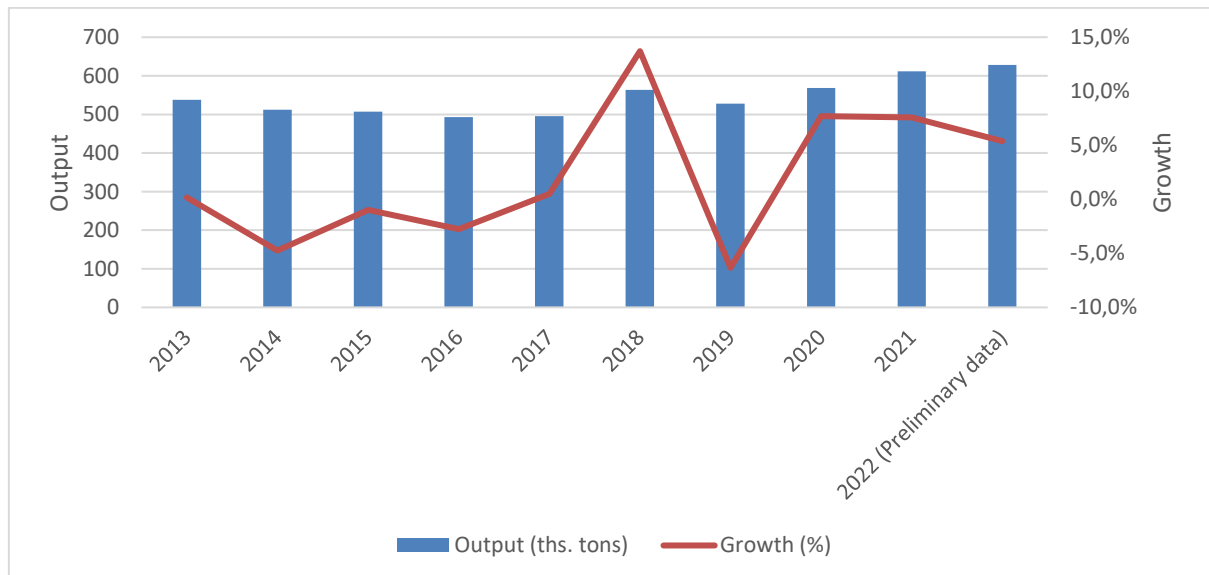
Figure 34: Vietnam's longan area in the period 2013-2022



Source: GSO

The national longan output increased by an average of 1.7%/year in the period 2013-2022, from 537.5 thousand tons in 2013 to 628.1 thousand tons in 2022.

Figure 35: Vietnam's longan output in the period 2013-2022



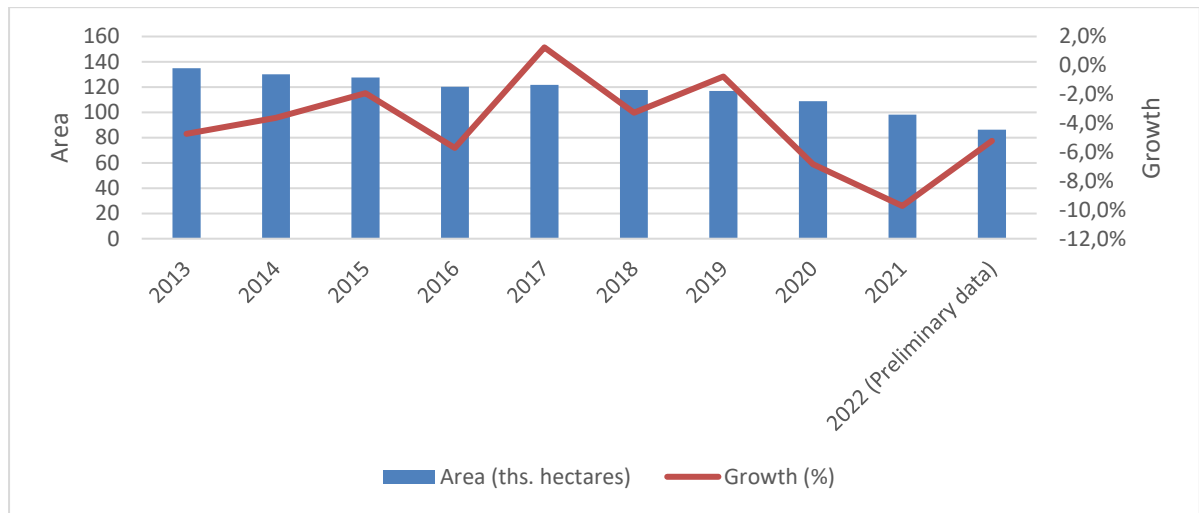
Source: GSO



(vii) Sweet potato production situation

Sweet potato area has tended to decrease in recent years, decreasing on average by 4.9%/year in the period 2013-2022, from 135.0 thousand hectares in 2013 to 86.2 thousand hectares in 2022.

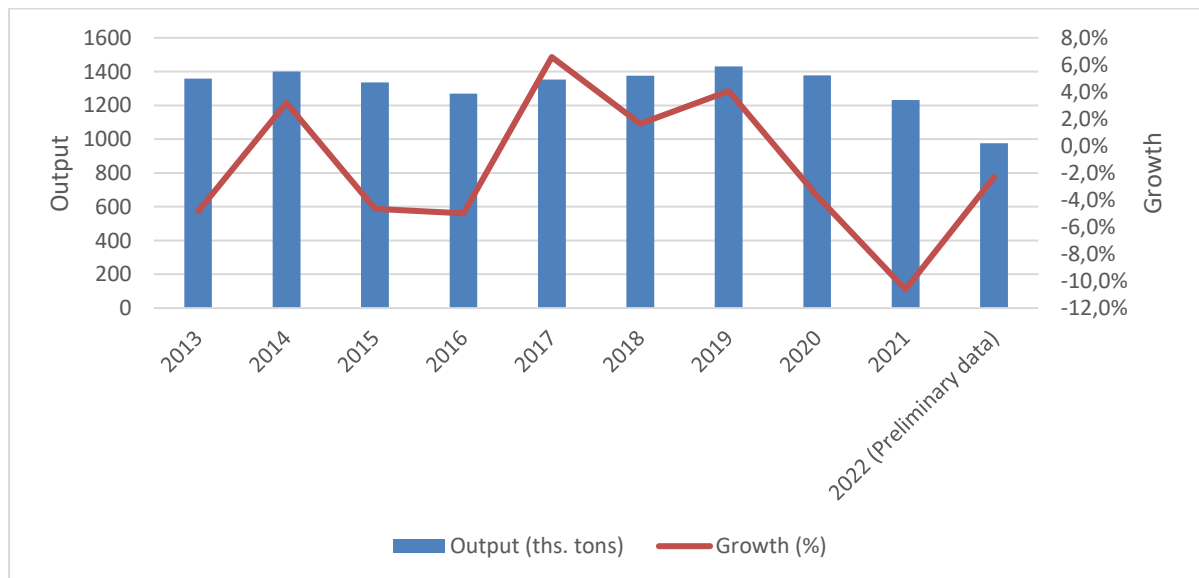
Figure 36: Vietnam's sweet potato area in the period 2013-2022



Source: GSO

Sweet potato output has also tended to decrease in the period 2013-2022, with an average decrease of 3.6%/year, from 1,358.1 thousand tons in 2013 to 976.1 thousand tons in 2022, after reaching a record high of 1,431 thousand tons in 2019.

Figure 37: Vietnam's sweet potato output in the period 2013-2022



Source: GSO



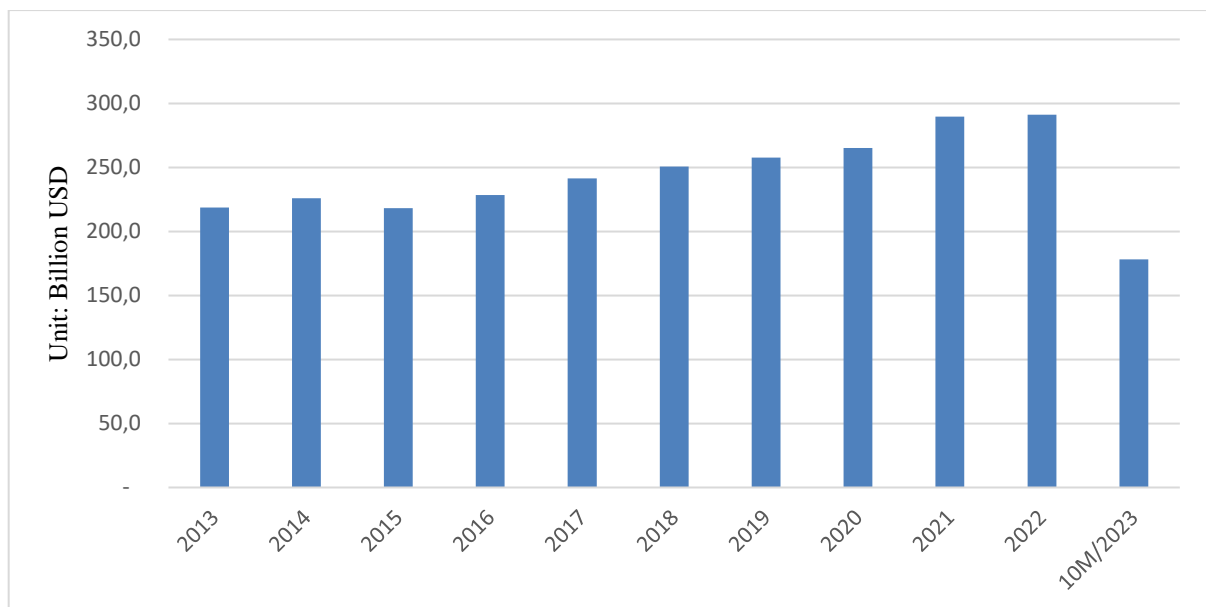
II. FRUIT AND VEGETABLE TRADE

2.1. Global fruit and vegetable trade

2.1.1. Export

According to Trademap, regarding global fruit and vegetable exports, total fruit and vegetable exports have increased steadily in the period 2013 - 2022 with an average annual growth rate of 3.2%/year, from 218.8 billion USD in 2013 to 291.2 billion USD in 2022. In the first 10 months of 2023¹, the global fruit and vegetable export value reached 178.2 billion USD, accounting for 61.2% of the total export value in 2022.

Figure 38: Changes in global fruit and vegetable export value in the period 2013-10 months of 2023



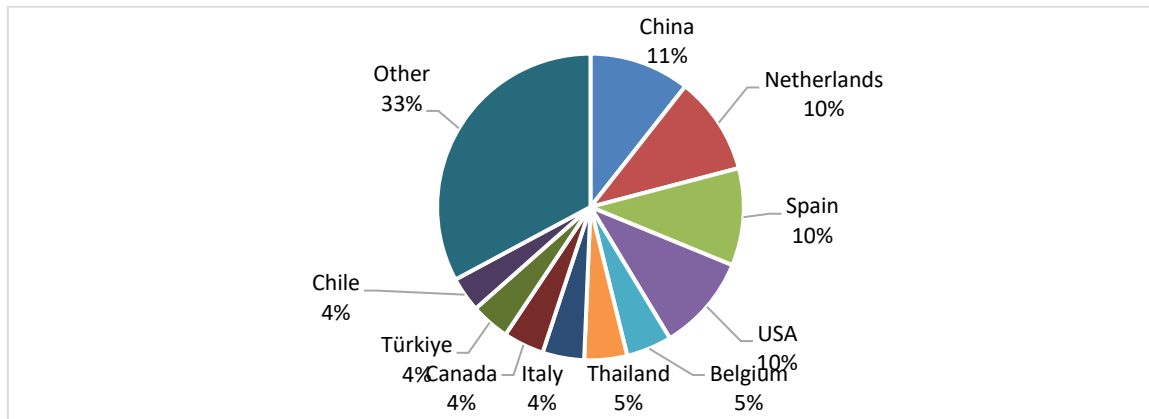
Source: Trademap, (January 9, 2024)

In the first 10 months of 2023, the total fruit and vegetable export value of the top 10 countries accounted for 67.2% of the total fruits and vegetables export value worldwide. Of which, China ranked first with 18.8 billion USD (accounting for 10.6% market share); Netherlands reached 18.4 billion USD (accounting for 10.3%); Spain reached 18.3 billion USD (accounting for 10.3%); etc.

¹Trademap statistics as of January 9, 2024



Figure 39: Export value of the top 10 fruit and vegetable exporting countries in the world, 10M/2023

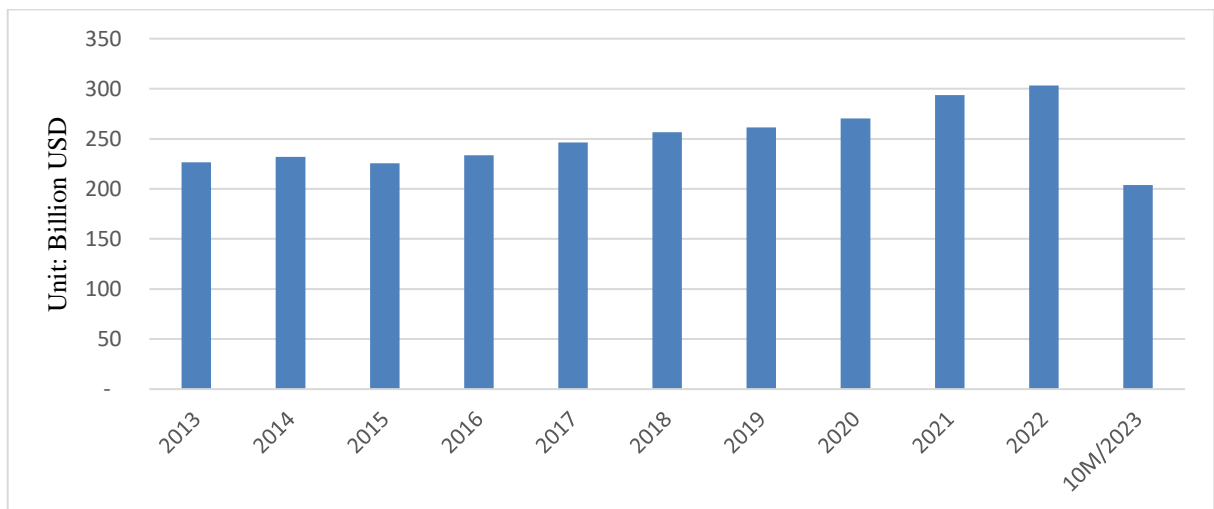


Source: Trademap, (January 9, 2024)

2.1.2. Import

According to Trademap, in terms of global fruit and vegetable imports, total fruit and vegetable imports increased steadily in the period 2013 - 2022 with a compound annual growth rate of 3.3%/year, from 226.5 billion USD in 2013 to 303.2 billion USD in 2022. In the first 10 months of 2023, the global fruit and vegetable import value reached 203.7 billion USD, equivalent to 67.2% of the import value in 2022.

Figure 40: Changes in global fruit and vegetable import value in the period 2013-10M/2023



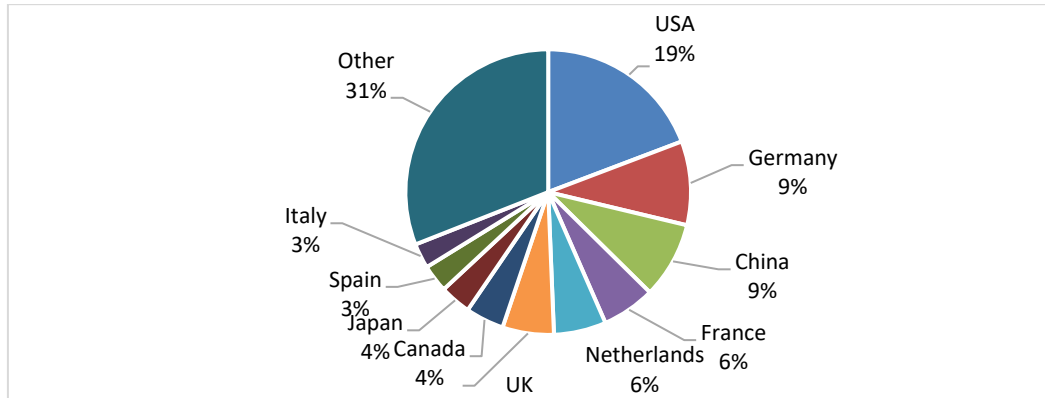
Source: Trademap, (January 9, 2024)

In the first 10 months of 2023, the fruit and vegetable import value of the world's 10 largest fruit and vegetable importing countries accounted for 69.0% of the total world fruit and vegetable import value. Of which, US imports reached 39.2 billion USD (accounting for 22.0%



of the total world fruit and vegetable import value); Germany reached 19.4 billion USD (accounting for 10.9%); China reached 17.6 billion USD (accounting for 9.9%); France reached 12.3 billion USD (accounting for 6.9%); Netherlands reached 12.1 billion USD (accounting for 6.8%); United Kingdom reached 11.9 billion USD (accounting for 6.7%); etc.

Figure 41: Top 10 fruit and vegetable importing countries in the world, 10M/2023



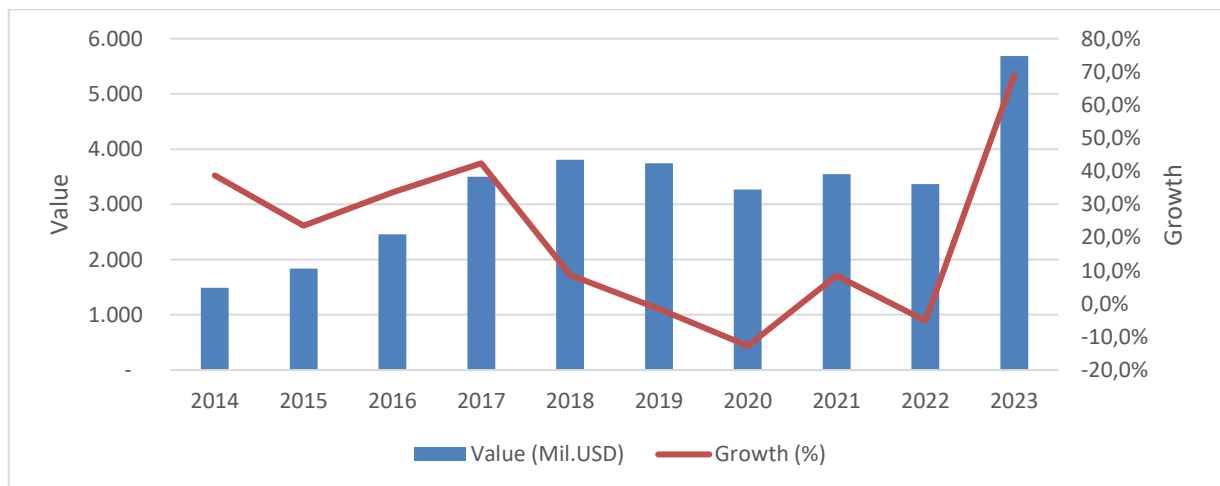
Source: Trademap, (January 9, 2024)

2.2. Vietnamese fruit and vegetable trade

2.2.1. Export

Vietnam's total fruit and vegetable export value increased by an average of 16.1%/year in the period 2014-2023, from 1.5 billion USD in 2014 to 5.7 billion USD in 2023².

Figure 42: Vietnam's fruit and vegetable export value in the period 2014-2023



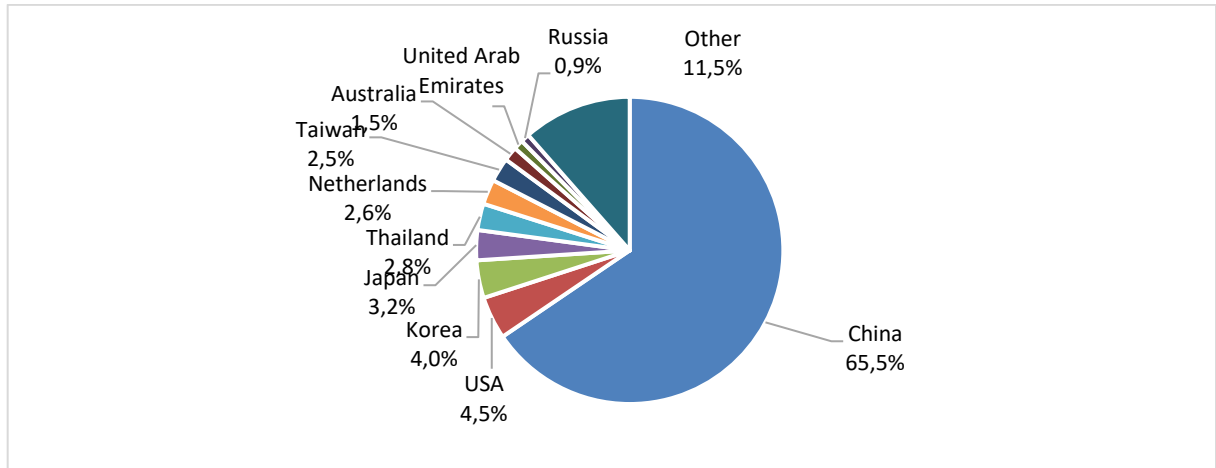
Source: General Department of Customs

² Data source for 2023:: Ministry of Agriculture and Rural Development



Vietnam's top 10 largest fruit and vegetable export markets in 2023 were: China, the United States, Korea, Japan, Thailand, the Netherlands, Taiwan, Australia, the United Arab Emirates and Russia. The market share of these top 10 countries accounted for 88.5% of Vietnam's fruit and vegetable export market share.

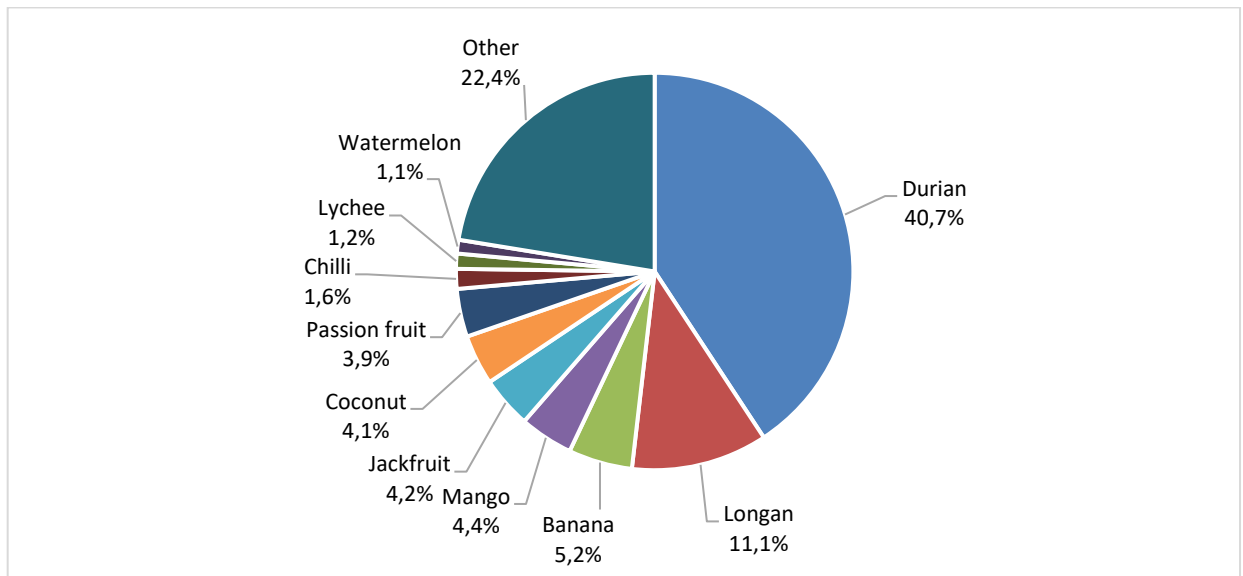
Figure 43: Structure of Vietnam's fruit and vegetable export market in 2023



Source: General Department of Customs

The most exported types of fruits and vegetables in 2023 were: durian, dragon fruit, banana, mango, jackfruit, coconut, passion fruit, chili, lychee, and watermelon. The export market share of these 10 types of fruits and vegetables accounted for 77.6% of the total fruit and vegetable export value.

Figure 44: Structure of Vietnam's fruit and vegetable export categories in 2023



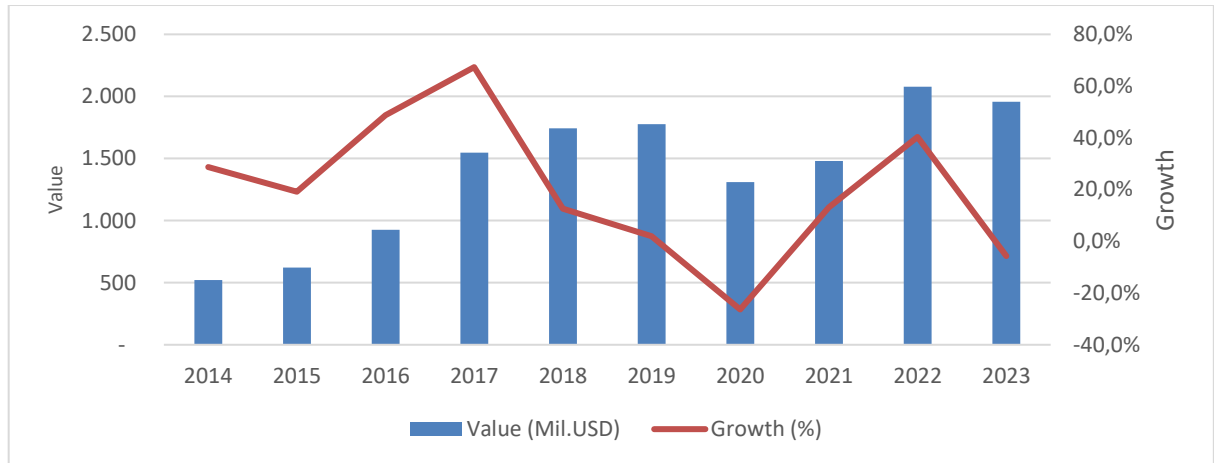
Source: General Department of Customs



2.2.2. Import

In addition to domestic production, Vietnam also imports many types of fruits and vegetables from other markets around the world. Vietnam's fruit and vegetable import value has tended to increase strongly with a compound annual growth rate of 15.8%/year in the period 2014-2023, from 521.9 million USD in 2014 to 1.96 billion USD in 2023³.

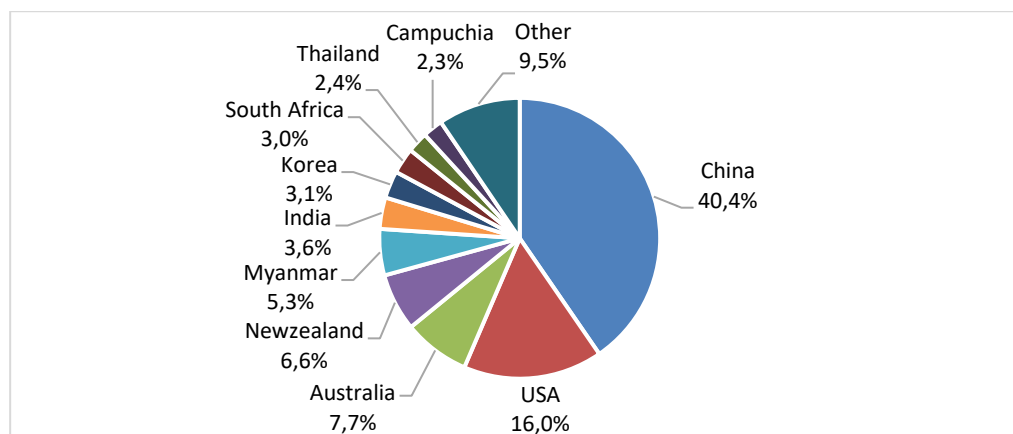
Figure 45: Vietnam's fruit and vegetable import value, 2014-2023



Source: General Department of Customs

According to the General Department of Customs, the main supply markets for Vietnam are China, the United States, Australia, New Zealand, Myanmar, India, Korea, South Africa, Thailand, and Cambodia. The market share of these 10 countries accounted for 90.5% of Vietnam's total fruit and vegetable import value.

Figure 46: Structure of Vietnam's fruit and vegetable import market in 2023



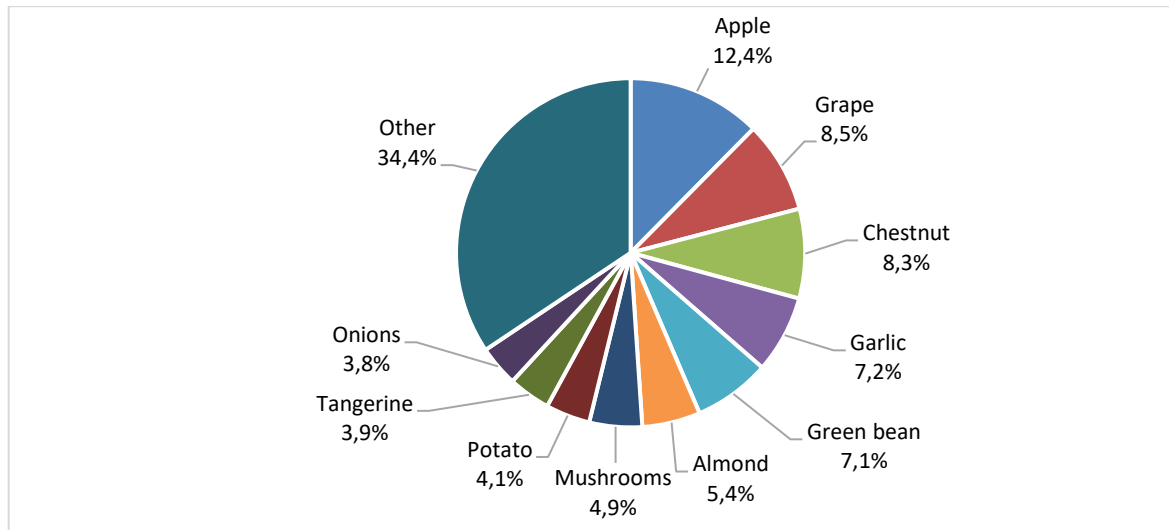
Source: General Department of Customs, 2023

³Source: Ministry of Agriculture and Rural Development



Vietnam’s most imported fruit and vegetable products in 2023 are: apples, grapes, chestnuts, garlic, green beans, almonds, mushrooms of all kinds, potatoes, tangerines, and onions of all kinds. The market share of these 10 types of fruits and vegetables accounted for 65.6% of the total import value of fruits and vegetables.

Figure 47: Structure of Vietnam's imported fruit and vegetable products in 2023



Source: General Department of Customs

2.2.3. Market opening situation

In 2023, a series of Vietnamese agricultural products were signed with the Official Export Protocol such as durian, dragon fruit, longan, rambutan, banana, sweet potato, etc. Especially, during the visit of Chinese General Secretary and President Xi Jinping from December 12 - 13, 2023, the Ministry of Agriculture and Rural Development of Vietnam and the General Department of Customs of China signed an additional Protocol for watermelons. The signing of this Protocol is an important step in promoting official exports of Vietnam's traditional agricultural products and standardizing regulations on agricultural export between the two countries. The demand for fruits and vegetables in the Chinese market is still huge, estimated at over 15 billion USD/year, which will be a great opportunity for Vietnam’s fruit and vegetable sector in 2024.

On September 16, 2023, within the framework of the 20th China - ASEAN Expo (CAEXPO) and China - ASEAN Business and Investment Summit (CABIS) in Nanning city, Guangxi province (China), Ministry of Agriculture and Rural Development of Vietnam and People's Government of Guangxi Zhuang Autonomous Region (China) signed a Memorandum of Understanding on agricultural cooperation.



Accordingly, the two sides agreed to jointly promote and develop cooperative relationships in agriculture and rural development as well as promote trade and investment in the agricultural sector. The two sides aim to achieve a sustainable growth in agricultural and fishery trade and agricultural investment between the two countries in the next 3 years; to form and creatively develop cross-border agricultural supply chains with the participation of businesses from both countries and achieve solid results in cooperation in agriculture and rural development.

The two sides will promote talent training, deepen cooperation in agricultural vocational training, and encourage exchanges and cooperation between agricultural universities and colleges, such as Guangxi University of Agricultural Vocational Technology, Vietnam National University of Agriculture, Thuyloi University, Vietnam National University of Forestry, Bac Giang Agriculture and Forestry University, and related agricultural vocational colleges, etc. Regarding cooperation in speeding up customs clearance of agricultural and fishery products, the two sides will strengthen connections with functional units to proactively promote procedures related to bilateral exports of agricultural and fishery products at local and department levels, such as China's sturgeon exports to Vietnam and Vietnam's export of coconut, lychees, grapefruit, seafood, and other agricultural products to China; upgrade and improve border gate infrastructure to effectively serve China-Vietnam cross-border agricultural, forestry and fishery trade; provide timely information on the customs clearance volume of agricultural, forestry and fishery products and other information in case of congestion or risk of congestion at border gates.⁴

2.3. Fruit and vegetable export enterprises

According to data of the General Department of Customs, by 2023, Vietnam had over 2,000 companies/enterprises exporting vegetables and fruits. The export value of the top 20 exporting enterprises accounted for 24.4% of the total fruit and vegetable export value of the whole year 2023.

On December 14, 2023, the Ministry of Industry and Trade issued Decision No. 3235/QD-BCT approving the list of "Reputable Export Enterprises" in 2022. This list of reputable export enterprises was compiled and announced based on the selection and recommendations of relevant agencies, selected based on criteria prescribed by the Ministry of Industry and Trade regarding minimum export turnover, business reputation with foreign customers, on compliance with obligations to the State in the field of customs, tax, environment, etc.

⁴<https://www.vietnamplus.vn/viet-nam-quang-tay-ky-ban-ghi-nho-ve-hop-tac-nong-nghiep-post894774.vnp>



In the field of vegetables, fruits and products from vegetables, and fruits, there are 17 businesses that meet the selection criteria, including:

No.	ENTERPRISES	SELECTION AGENCIES
1	Vina T&T Import-Export Trading Service Company Limited	Vietnam Fruit and vegetable Association
2	Luong Quoi Coconut Processing Company Limited	Vietnam Fruit and vegetable Association
3	Chanh Thu Fruit Import and Export Company Limited	Vietnam Fruit and vegetable Association
4	Ben Tre Coconut Investment Joint Stock Company	Department of Industry and Trade of Ben Tre province
5	Ant Farm One Member Co., Ltd	Vietnam Fruit and vegetable Association
6	Nafoods Group Joint Stock Company	Department of Industry and Trade of Nghe An province
7	An Giang Vegetable, Fruit and Food Joint Stock Company	Department of Industry and Trade of An Giang province
8	Vien Son Joint Stock Company	Department of Industry and Trade of Lam Dong province
9	Hung Hau Food Joint Stock Company	Vietnam Fruit and vegetable Association
10	Western Import-Export Food Processing Joint Stock Company	Vietnam Fruit and vegetable Association
11	Khang An Food Joint Stock Company	Vietnam Fruit and vegetable Association
12	Natural Da Lat Food Processing Joint Stock Company	Department of Industry and Trade of Lam Dong province
13	Essence Food Joint Stock Company	Vietnam Fruit and vegetable Association
14	Tien Giang Fruits and vegetables Joint Stock Company	Vietnam Fruit and vegetable Association
15	HAGIMEX Joint Stock Company	Department of Industry and Trade of Ha Nam province
16	Green Powers LLC	Vietnam Fruit and vegetable Association
17	Quynh Trung Agricultural Products Company Limited	Department of Industry and Trade of Binh Phuoc province

Source: Ministry of Industry and Trade



III. SOME POLICIES AFFECTING THE FRUIT AND VEGETABLE SECTOR IN 2023

3.1. International policies

a. China

On October 16, 2023, at Yanhe Station in Yuxi City, Yunnan Province, China, the opening ceremony of international cold-chain freight train services on China-Vietnam and China-Laos routes was held⁵. In particular, the international train carrying refrigerated goods between China and Vietnam is operated on the Kunming - Ngoc Khe railway and the Vietnam - China railway, with a 20-hour journey, connecting directly Kunming and Ngoc Khe cities of Yunnan province, China to Lao Cai, Vietnam. According to the assessment by the operating unit, this freight railway has the advantages of safety, stability, short duration, good transport capacity, with the features of cold chain equipment during transportation. Thanks to that, this ensures the freshness of goods such as vegetables and fruits from Yunnan to Vietnam, Laos and vice versa. In the initial phase of operation, the refrigerated cargo train between China and Vietnam will operate with a frequency of one trip/week, then will be adjusted based on customer demands. The opening of international railway routes carrying refrigerated goods between China and Vietnam and Laos will help bring Yunnan province's products abroad, while importing tens of thousands of tons of tropical fruits from Vietnam, Laos, and Thailand into the Chinese market. Before the opening of the refrigerated cargo train, international intermodal railways between China and Vietnam had operated 4,100 trips, transporting more than 1.6 million tons of cross-border goods, contributing to promoting trade and exchange of goods between the two countries.

China built trade centers for ASEAN's fruits in three major cities of Guangxi province, including Chongta, Nanning and Khamzhou⁶. These three fruit trade centers are implemented under the China-ASEAN Agricultural Product Distribution Center project, aiming to build a complete trade system including fruit distribution, trading and processing; helps imported fruit be distributed throughout China and elevates trade relations between China and ASEAN members. The establishment of these centers will promote the development of imported fruit transportation networks, benefiting both Chinese consumers as well as reducing transportation costs for ASEAN fruit exporters. The fruit trade center in Qinzhou, near the city's port area, is part of China's Free Trade Zone Pilot project. With the advantage of owning many sea routes with ASEAN countries, this center is responsible for accessing the markets of Malaysia, Cambodia and Thailand, and bringing high-quality tropical fruits such as durian, mango and longan to Chinese consumers. During the center's inauguration ceremony, Malaysia's first

⁵ <https://nhandan.vn/trung-quoc-khai-truong-chuyen-tau-cho-hang-bao-quan-lanh-den-viet-nam-post777955.html>

⁶ <https://nongnghiep.vn/trung-quoc-day-manh-nhap-trai-cay-tu-asean-qua-tinh-quang-tay-d360628.html>



shipment of durians arrived at Kham Chau port, then were processed and transferred to a specialized cold storage. Compared to importing fruit through Huu Nghi International Border Gate in Lang Son, Vietnam, Kham Chau port has many greater advantages because transportation costs by sea are lower than those by road. Sea transportation of fruits can save an average of 10,000 yuan/container compared to by road. In the next three years, Qinzhou plans to build a China-ASEAN fruit trade market and online trade platform, aiming for the goal of fruit import and export reaching over 600,000 tons/year by 2025. Kham Chau Port is connected to 26 seaports of ASEAN countries with 36 freight routes.

Chongqing City, in Southwest China, where the New International Land-Sea Trade Corridor initiative was launched, has also been developing a distribution network for agricultural products imported from ASEAN countries throughout China. The Chongqing city government is making efforts to facilitate land and sea transportation activities, along with trade corridors connecting Guangxi and Yunnan provinces with ASEAN countries, including Laos, Vietnam and Myanmar.

In recent years, China has planned to proactively supply many tropical fruit products such as dragon fruit and durian. China's dragon fruit area has increased to 67,000 hectares with an output of 1.6 million tons by 2022, surpassing Vietnam in both area and output. In 2023, the durian trial planting project with an area of 20 acres (about 1.33 hectares) was officially implemented in Sam Khe city (Guangxi province, China).

b. USA

The U.S. Department of Commerce is expected to make a decision in the coming months on terminating the 2019 Tomato Suspension Agreement⁷. Accordingly, tomatoes imported from Mexico and sold in the United States are controlled by the US Department of Commerce through suspension agreements, which set minimum prices and regulate sales between growers and importers. The reason is that in June 2023, representatives of the Florida Tomato Exchange (FTE) asked the federal government to terminate the agreement. The FTE accused the Government of failing to prevent unfair trade by Mexico, which were allegedly aimed at undermining the U.S. tomato industry. FTE representatives argued that suspension agreements can be an effective tool for products that can be stored in warehouses until market conditions improve, but for highly perishable commodities like fresh tomatoes, there are too many incentives to avoid reference prices in oversupplied markets.

c. ASEAN

⁷ <https://freightwaves.com/news/borderlands-us-mulls-terminating-tomato-trade-agreement-with-mexico>



Thailand is planning to establish a "Thai Durian Fund"⁸ following the rubber sector model to support the sustainable development of the durian sector. Durian export tax will be levied at 25 satang/kg (100 satang = 1 baht), equivalent to about 0.051 yuan/kg. According to the current annual durian output of 1.5 million tons, total annual tax revenue is estimated at 375 million baht (about 10.5 million USD). This fund will use taxes and fees collected from durian exporters to fund durian research and development activities; control and maintain durian product quality to promote export and processing of Thai durian; support compensation for farmers and peasants affected by natural disasters or uncontrollable events; and cover management costs. There are 25 articles in the "Thai Durian Fund Law". Tax evaders will be imprisoned up to 6 months or a fine not exceeding 10 times the amount payable but not less than 5,000 baht, or both.

The Philippines and South Korea signed a Bilateral Free Trade Agreement (FTA) on September 7, 2023 in Jakarta (Indonesia)⁹. Under the agreement, South Korea will eliminate tariffs on 94.8% of items and the Philippines will remove tariffs on 96.5% of traded goods. The agreement will take effect from the first half of 2024. Currently, Philippine banana exports to Korea are subject to a 30% tax and will reduce to 0% within the next 5 years. The export tax on processed pineapples to Korea (currently at 36%) will also be eliminated within the next 7 years.

Malaysia's Royal Pahang Durian Group (RPDG) has signed four cooperation agreements to promote durian exports to the Chinese market, including an agreement to establish a branch specializing in the distribution and retail of frozen durian in the Chinese market; an agreement on a strategic cooperation framework allowing RPDG products to be sold on JD.com's platform; an agreement on strategic framework for logistics cooperation; and an agreement on research cooperation to increase durian production.

d. Korea

Korea's Ministry of Food and Drug Safety Agency (MFDS) said that from March 30, 2023, it will enforce the "Importer Inspection Order", permitting units to import chili from Vietnam into the country after they present documents ensuring product safety regarding pesticide residues (Diniconazole and Tolfenpyrad).

e. EU

On October 11, 2023, the EU published Official Gazette No. 2023/2210¹⁰ regulating the setting of tariff quotas for some types of imported fruits from January 2024 to June 2025.

⁸ <https://guojiguoshu.com/article/8817>

⁹ <https://www.philstar.com/business/2023/09/09/2294822/south-korea-scrap-tariffs-philippine-banana-pineapple>

¹⁰ <https://vinanet.vn/chinh-sach-the-gioi/eu-quy-dinh-nguong-han-ngach-thue-quan-mot-so-loai-hoa-qua-774224.html>



Accordingly, tomatoes, cucumbers, artichokes, zucchini, lemons, citrus fruits, grapes, apples, pears, apricots, cherries, peaches, and plums, exceeding the prescribed quota upon importation into the EU, will be subject to an additional import tax. These fruits are widely consumed in the EU and are commonly sold in supermarkets.

On March 3, 2023, the EU issued new Regulation No. ((EU) 2023/466 amending Annexes II, III, and V of Regulation (EC) No. 396/2005 of the European Parliament and the Council relating the maximum residue level (MRL) for the active ingredients isoxaben, novaluron, and tetraconazole in or on agricultural food products, including fresh and frozen vegetables, tubers and fruits.

On June 26, 2023, the European Commission proposed an agricultural support package¹¹ worth 330 million Euros from the Common Agricultural Policy Fund (CAP) for 22 member countries. This aims to support EU farmers affected by adverse climate events, high input costs, and trade related issues and diverse market. In addition, the EU approved a 100 million Euro support package for Bulgaria, Hungary, Poland, Romania and Slovakia that was proposed since May 3 due to logistics congestion faced by farmers in these five countries after importing a large quantity of agricultural and food products from Ukraine.

f. Some other countries

According to Russia's Agricultural Products Supervision Agency (Rosselkhoznadzor), from December 4, 2023, restrictions on importing fruits and vegetables from Moldova will take effect again. The reason is that Moldova has not taken any action to correct Russia's violation of plant quarantine safety.

The Russia-Kyrgyzstan Development Fund has allocated 4 million USD to support the establishment of the first fruits and vegetables freezing plant in Kyrgyzstan. The plant has a capacity of 4,000 tons and is supplied with products from more than 1,000 farmers nationwide. The plant will help prevent food shortages and boost Kyrgyzstan's exports.

On October 31, 2023, the Kenya Agriculture and Food Authority (AFA) decided to temporarily suspend avocado exports after concerns that some exporters were mixing mangoes and avocados for sea shipping. Accordingly, from November 13, mango exporters will be subject to stricter supervision to ensure the authenticity of their export shipments. Temporary export ban on Kenyan avocados will apply until further guidance in mid-January 2024.

India has imposed a ban on the import of apples at a CIF import price (cost, insurance and freight) less than or equal to Rs 50/kg (US\$0.6/kg) to protect the interests of domestic apple growers.

¹¹ https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3189



Ireland will fund about \$495,000 for a project by the Food and Agriculture Organization of the United Nations (FAO) to support potato growing in Ukraine.

3.2. Domestic policies

a. Crop cultivation development strategy until 2030, with a vision to 2050

On December 30, 2023, the Prime Minister issued Decision No. 1748/QĐ-TTg approving the crop cultivation development strategy until 2023, with a vision to 2050

General objectives:

Develop cultivation into a complete, professional technical-economic sector with highly competitive products, ensuring food safety, national food security and other needs of the economy, increasing export value; using resources effectively, protecting the ecological environment, effectively preventing and combating natural disasters and adapting to climate change; creating jobs, improving income and quality of life for farmers, contributing to social stability and ensuring national defense and security.

Specific objectives until 2030:

- An average growth rate of crop production value will be 2.2 - 2.5%/year; the average growth rate of value added in the crop processing industry will range between 8 - 10%/year.

- Ensure proactive irrigation on over 85% of the land area dedicated to rice cultivation; 70% of the upland crop area should be irrigated, with at least 30% of the irrigated area using advanced, water-saving irrigation methods.

- Percentage of production area practicing good agricultural practices (VietGAP and equivalent, etc.): 10 - 15%, organic farming 1%. The percentage of value of crop products produced in forms of cooperation and association will reach 30 - 35%.

- Export turnover of agricultural products will reach over 26 billion USD.

- The average product value per 1 hectare of cultivated land will reach 150 - 160 million VND.

Orientation for development of some key crops:

❖ *Vegetables*

Promote the advantages of land, water resources, and climate to increase area and diversify types and crops to meet rapidly growing domestic and export demands.

Build clusters linking production with processing and consumption of vegetables in localities and regions with high vegetable output. Develop safe vegetable production areas, focusing on ensuring traceability of origin.



Vegetable production will focus on improving quality, applying high technology, producing according to good agricultural practices (VietGAP), and organic processes to improve product quality and value.

❖ ***Fruit trees***

Reorganize production, form key fruit production areas based on promoting the potential and advantages of ecological regions, associated with the development of processing factories and consumption markets. Prioritize the development of a number of advantageous fruit trees with established consumer markets such as mango, banana, dragon fruit, pineapple, etc.

Promote the spread of fruit tree harvests associated with sustainable development regional links; rapidly develop safe production areas certified by VietGAP, GlobalGAP and granted planting area codes; synchronously apply scientific and technological advances in production and product preservation.

Enhance processing and product diversification, especially deep processing to add value and create differences in some advantageous Vietnamese fruits associated with building and developing Vietnamese fruit brands with some advantageous fruits.

b. Project to develop key fruit trees and flower and ornamental plant sector in Quang Tri province until 2030

On June 19, 2023, the People's Committee of Quang Tri province signed Decision No. 1258/QD-UBND approving the plan to implement the project to develop key fruit trees and the flower - ornamental plant sector in Quang Tri province by 2030.

General objective: Gradually develop key fruit trees with a commodity-oriented scale, focusing on production associated with processing, branding and sustainable development; etc.

Specific objectives for fruit trees until 2030:

- There will be 10,000 hectares of various fruit trees, with an output of over 190,000 tons, of which the key fruit area will be 8,000 hectares, with an output of over 160,000 tons;
- Concentrated fruit production areas aims to achieve: The ratio of product value produced in forms of cooperation and association will reach 30-40%; The ratio of new planting and replanting areas using high quality seeds will be 60%; The proportion of fruit tree area applying good agricultural practices (VietGAP and equivalent...), organic methods will reach 40-50%; 20-30% of areas utilizing advanced irrigation techniques and water-saving practices;
- Grant planting area codes for more than 50% of key fruit tree areas;
- Develop specialty fruit varieties and high-quality varieties associated with processing



facilities and brand building. Strive to have at least 1-2 products rated as OCOP products in localities.

- Achieve an average income of 250 million VND/ha/year in concentrated fruit production areas.

c. Project for sustainable fruit tree development in Kon Tum province until 2025, with a vision to 2030

On December 28, 2023, the People's Committee of Kon Tum province signed Decision No. 791/QD-UBND approving the project for sustainable fruit tree development in Kon Tum province until 2025, with a vision to 2030.

General objectives:

- Promote the restructuring of the agricultural sector, transform the crop structure in the province towards increasing value per unit of area. Effectively promote the natural advantages to form large, suitable, sustainable, and commodity fruit tree production areas associated with the development of deeply processed fruits products; establish elite orchards, seed nurseries, plant seed markets, etc. to supply seeds locally to ensure quality and origin; Build processing plants and facilities for preliminary processing, packaging, and preservation of fruits to ensure quality and export standards.

- Develop concentrated fruit production areas, apply high technology, good agricultural practices or quality standards in production, fresh and post-processed fruit products ensure food hygiene and safety standards to meet consumer needs, provide raw materials for fruit processing factories and serving export.

- Improve the operational efficiency of fruit production cooperatives according to commodity scale, high technology application, and quality standards in production and products.

Specific objectives until 2025:

- Form and develop about 13,000 hectares of fruit trees in the province. The focus is on establishing concentrated planting areas, specializing in a number of key fruits (including durian, banana, avocado, jackfruit, passion fruit, pineapple, mango, longan, citrus) in areas with suitable and favorable natural conditions in the province. Of which, there are at least 2,450 hectares of specialized cultivation in key production areas of districts and cities. At the same time, renovate mixed garden areas and convert other crop areas with low economic efficiency to grow fruit trees.

- Apply scientific and technical advances to planting, caring, harvesting, and processing fruit trees according to production quality standards (Viet GAP, organic, GlobalGAP, etc.),



Fresh and post-processed fruit products ensure product quality (ISO 22000, HACCP, SQF, IFS, etc.). Strive to build and obtain authorized certification for at least 35 fruit growing area codes, and 10 packaging facility codes that meet export criteria set by importing countries. The fruit growing area applying scientific and technical advances should reach over 50%.

- Establish and recognize elite trees and elite orchards for each key fruit type (including durian, banana, avocado, jackfruit, passion fruit, pineapple, mango, longan, citrus, etc.) that is adaptable to the province's natural and ecological conditions and has high quality and high productivity associated with the development of fruit seed production and business establishments applying high technology and advanced technology to meet the objectives of developing fruit trees in the province.

- Form and improve production capacity of fruit preliminary processing and processing facilities in the province. Strive to attract investment in at least 02 fruit processing factories in operation, with a total capacity of 160,000 tons/year or more, creating high quality and deeply processed products.

- Form and develop linkage chains of planting, caring, harvesting, processing and consuming fruits associated with the formation of cooperatives in concentrated and specialized fruit growing areas, associated with the implementation of the One Commune One Product Program. Strive to form linkage chains with a province-wide scope of operations and expand links to other provinces with similar potentials and advantages. Kon Tum province's fruit products are purchased, processed, and consumed by large enterprises in supermarket systems inside and outside the province and are aimed at export.

- Strive for fruit consumption output to reach about 113,000 tons/year (with a focus on durian 15,500 tons, banana 29,500 tons, passion fruit 32,000 tons, citrus 6,500 tons, and some other types), accounting for 30.2% of the total value of agricultural production in the province.

Specific objectives until 2030

- Maintain the objectives achieved in the period 2021 - 2025 and strive to reach about 15,000 hectares of fruit trees in the province by 2030 for key fruit trees that ensure production and product quality standards and conditions as stipulated. Increase the area of concentrated and specialized planting to 4,770 hectares.

- Attract and form at least 01 additional fruit product processing factory with large capacity and deep processing capacity.

- Stable development of chains linking planting, care, harvesting, processing and consumption of fruits associated with expanding cooperatives that operate effectively.

- Stabilize and effectively exploit elite orchards in the province. Expand the scale of



fruit seed orchards. Develop wholesale markets and plant seed markets to proactively supply high-quality fruit varieties for fruit tree development.

- Strive for consumption output of about 142,000 tons/year (with a focus on durian 22,200 tons, passion fruit 49,000 tons, bananas 38,000 tons, citrus 9,200 tons and other types), accounting for 32.4% of the total value of agricultural production in the province.

d. Plan to develop key fruit trees in Dong Thap province for the period 2023 - 2025, orientation to 2030

On July 17, 2023, the People's Committee of Dong Thap province approved Plan No. 250/KH-UBND on Developing key fruit trees in Dong Thap province for the period 2023 - 2025, orientation to 2030

General objectives: Develop key fruit trees in Dong Thap province centrally, safely and sustainably, achieving high productivity, quality and economic efficiency, suitable for consumer markets, increasing income for producers, increasing export value, and promoting restructuring of the agricultural sector.

Specific objectives:

❖ **By 2025**

- The area of fruit trees in the whole province will be 46,413 hectares, with an output of over 463 thousand tons, of which: citrus trees (area of 10,064 hectares, output of 192.4 thousand tons); longan (5,515 hectares, 51.9 thousand tons); mango (16,764 hectares, 178.1 thousand tons); and organic fruit production area will be 548 hectares..

- In concentrated fruit production areas: (1) The proportion of product value produced in forms of cooperation and association will reach 30 - 35%; (2) The proportion of new planting and replanting areas using high quality varieties will be 70 - 80%.

- The rate of production area applying good agricultural practices will be 30% (VietGAP and equivalent), the area applying advanced water saving will be 20 - 30%.

- Area of fruit trees that need to be managed:

+ Jackfruit tree area will be 4,067 hectares, its output will be 21.2 thousand tons.

+ Durian tree area will be 3,004 hectares, its output will be 4.8 thousand tons.

❖ **By 2030**

- The area of fruit trees in the whole province will be 55,000 hectares, output will be over 550 thousand tons, of which: citrus trees (area of 13,335 hectares, output of 292.5 thousand tons); longan (7,000 hectares, 72.9 thousand tons); mango (20,180 hectares, 217.3



thousand tons); Organic fruit production area will be 1,330 hectares..

- In concentrated fruit production areas: (1) The proportion of product value produced in forms of cooperation and association will reach 60 - 70%; (2) The proportion of new planting and replanting areas using high quality varieties will be 80 - 90%.

- The rate of production area practicing good agricultural practices will be 40 - 50% (VietGAP and equivalent), the area applying advanced water saving will be 30 - 40%.

- Area of fruit trees that need to be managed:

+ Jackfruit tree area will be 3,500 hectares, its output will be 20.1 thousand tons.

+ Durian tree area will be 3,004 hectares, its output will be 4.8 thousand tons.

Investment in infrastructure in key fruit growing areas

- Invest and upgrade irrigation systems and intra-field transportation systems in large-scale concentrated production areas in accordance with each locality's planning. Develop a logistics system to serve trade for other agricultural products associated with the provincial fruit wholesale market.

- Provide funding support for investment in building transportation systems, cold storage, product handling, pre-processing and packaging systems based on proposals and business plans of enterprises and cooperatives.

- Construct storage areas and tank systems for pesticide packaging for concentrated fruit growing areas.



IV. PROSPECTS OF FRUIT AND VEGETABLE SECTOR

4.1. Current state of world consumption

Fruits and vegetables are important components of a healthy diet. Reduced fruit and vegetable consumption is associated with poor health and increased risk of non-communicable diseases (NCD). An estimated 3.9 million deaths worldwide were attributable to inadequate fruit and vegetable consumption in 2017. However, many people do not eat enough fruits and vegetables. The World Health Organization (WHO) recommends consuming at least 400 grams per day to reap the health and nutritional benefits.

The European Union considers the solution to the problem of low consumption of fruits and vegetables as one of its priorities, and supports the development of the sustainable food consumption, specified in the provisions of the European Green Deal, the objectives of the Farm to Fork strategy, the State of Food Security and Nutrition in the World 2022 and 2021 report, and including the fruit and vegetable sector in the Common Agricultural Policy (CAP) Strategic Plans in EU countries. The measures taken to counteract the low fruit and vegetable consumption include actions supporting rational nutrition and health initiatives, found among national strategies to improve health and reduce disease, as well as in a number of global dietary recommendations developed for various countries.

The Food and Agriculture Organization (FAO) of the United Nations says that up to 3.9 million lives could be saved each year if the consumption of fruits and vegetables were sufficient. It is estimated that a lack of fruits and vegetables in the human diet or their low consumption can lead to an increased risk of chronic diseases, impaired metabolism as well as regulatory and digestive problems .

WHO recommends maintaining a healthy diet from an early age, including eating a significant amount of fruits and vegetables. Adults' daily intake of fruits and vegetables should be at least 400 g (about 150 kg per person per year). There is also a second, more stringent, and less cited WHO recommendation, which considers the age of the consumer. Recommended fruit and vegetable consumption is 600 g per day for adults and adolescents (aged 15 years and over), 480 g per day for children aged 5–14 years, and 330 g per day for children aged 0–4 years old. The recommended minimum number of servings is five per day: two fruits and three vegetables (excluding potatoes, sweet potatoes, cassava and other starchy tubers). Due to the fact that each type of fruit and vegetable does not have uniform nutritional value, it is necessary to be careful to ensure their diversity in daily consumption¹².

4.2. Forecasting world fruit and vegetable consumption trends

¹²<https://www.mdpi.com/2071-1050/15/21/15512>



The market size of fruit and vegetable ingredients has grown strongly in recent years, from 221.27 billion USD in 2023 to 234.62 billion USD in 2024, at a compound annual growth rate (CAGR) of 6.0%. The growth in the historic period can be attributed to health awareness, clean label movement, taste and flavor enhancement, rise in vegetarian and vegan diets, and changing consumer preferences.

The market size of fruit and vegetable ingredients is expected to grow strongly in the next few years, reaching USD 304.14 billion by 2028, at a compound annual growth rate (CAGR) of 6.7%. The growth in the forecast period can be attributed to growing demand for natural food additives, innovative product developments, convenient and ready-to-eat solutions, expansion in global market, changing consumer dietary patterns. Major trends in the forecast period include global culinary fusion, sustainable sourcing and production, convenience and snacking trends, functional foods and ingredients, plant-based and vegan diets.¹³

4.3. Forecasting Vietnam's production trends

The Ministry of Agriculture and Rural Development aims to achieve a growth rate of production value of 2.0 - 2.2%; the value of products harvested on 1 hectare of cultivated land is 125 million VND. Develop circular farming, low carbon emissions, environmentally friendly, placing crop production in a circular economic model, especially the crop, livestock and aquaculture chain towards minimizing waste, , turning waste from one sub-sector into quality input for another sub-sector, thereby reducing resource exploitation, reducing production costs, and improving product competitiveness. Focus on developing large-scale specialized commodity production areas (large fields), high quality such as rice, vegetables, flowers, specialty fruits, etc. associated with cooperation, production linkage, and value chain development; Build growing area codes associated with geographical indications, traceability and brand development. Research, select, create, import, and transfer plant varieties with high yield, good quality, and resistance to pests and diseases; adapting to climate change and meeting to market diversification requirements. Apply synchronous mechanization from production to harvesting, preservation, and processing along the value chain, first of all for key products in concentrated, large-scale production areas. Implementing the Politburo's Conclusion and the Government's Resolution on "Ensuring national food security until 2030"; flexible use of rice land to both ensure national food security and improve land use efficiency, and increase farmers' income; guide the conversion of ineffective rice land to other crops with higher markets and income, focusing on vegetables, fruit trees and fishery.

¹³<https://www.thebusinessresearchcompany.com/report/fruit-and-vegetable-ingredients-global-market-report>



- The Ministry of Agriculture and Rural Development has oriented the development of key crops as follows: (1) Sweet potatoes (area of 85 thousand hectares, output of 1.0 million tons); (2) Food crops: increasing vegetable area to 1.03 million hectares, yielding 19.7 million tons. Bean area of 130 thousand hectares, output of 160 thousand tons; (3) Fruit trees: Increasing area to 1.28 million hectares, including: Mango trees: Area of 118 thousand hectares, output of 1.1 million tons. Banana tree: Area of 162 thousand hectares, output of 2.65 million tons. Dragon fruit tree: Area of 52 thousand hectares, output of 1.35 million tons. Orange tree: Area of 82 thousand hectares, output of 1.75 million tons. Grapefruit tree: Area of 110 thousand hectares, output of 1.15 million tons. Pineapple: Area of 52 thousand hectares, output of 750 thousand tons. Longan: Area of 83 thousand hectares, output of 650 thousand tons. Lychee: area of 55 thousand hectares, output of 370 thousand tons. Durian tree: Area of 130 thousand hectares, output of 1.2 million tons. Jackfruit tree: Area of 82 thousand hectares, output of 980 thousand tons.¹⁴

¹⁴Report summarizing the implementation of the 2023 agricultural and rural development plan and implementing the 2024 plan of the Ministry of Agriculture and Rural Development

The report is compiled from the following sources:

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|--|---|
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