

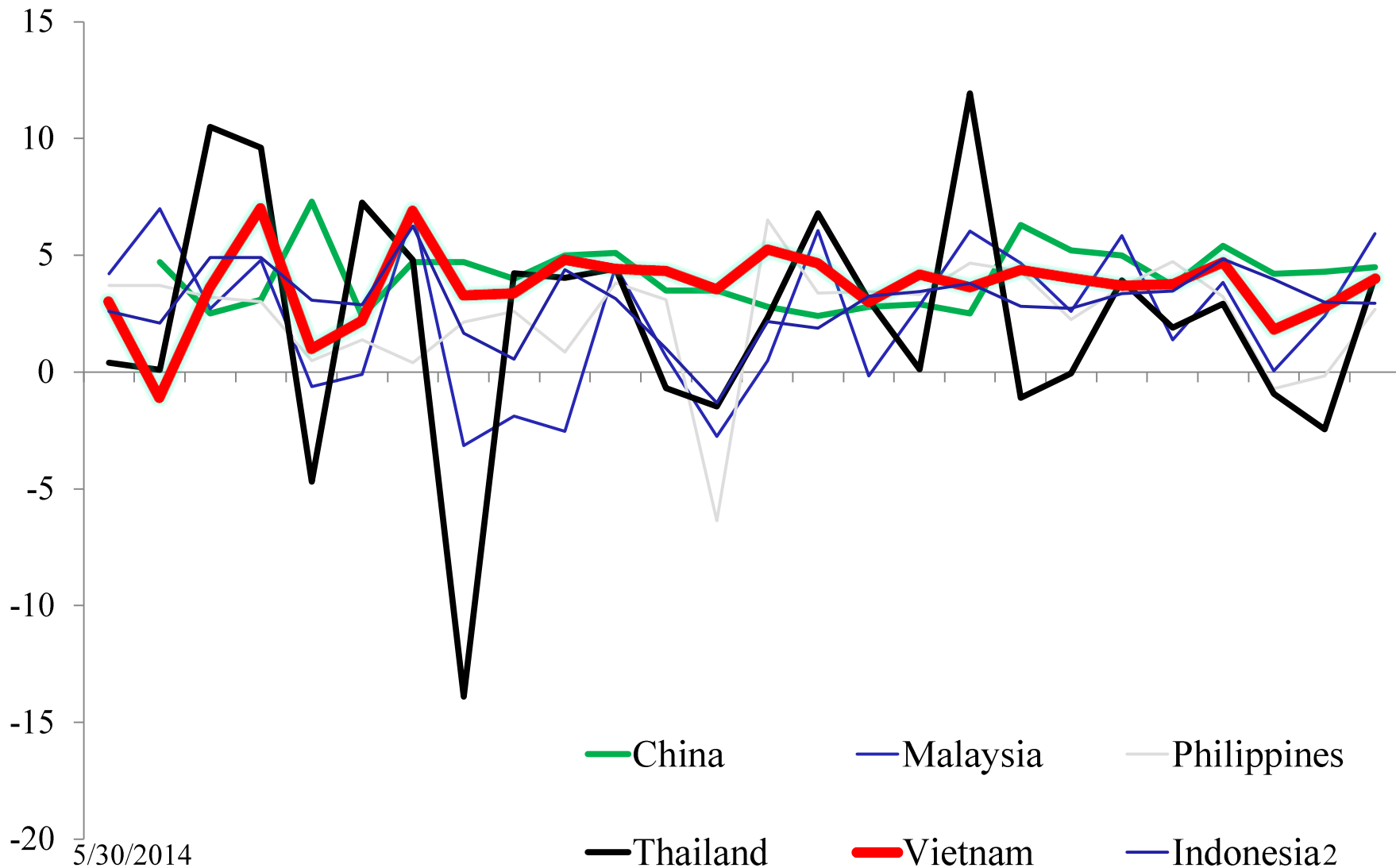
Argentina and Asia in 2030 Agribusiness strategy for a developing world

A woman wearing a traditional conical hat and a dark long-sleeved shirt is harvesting rice in a golden field. She is holding a bundle of harvested rice stalks. The background shows a vast field of rice plants under a bright sky.

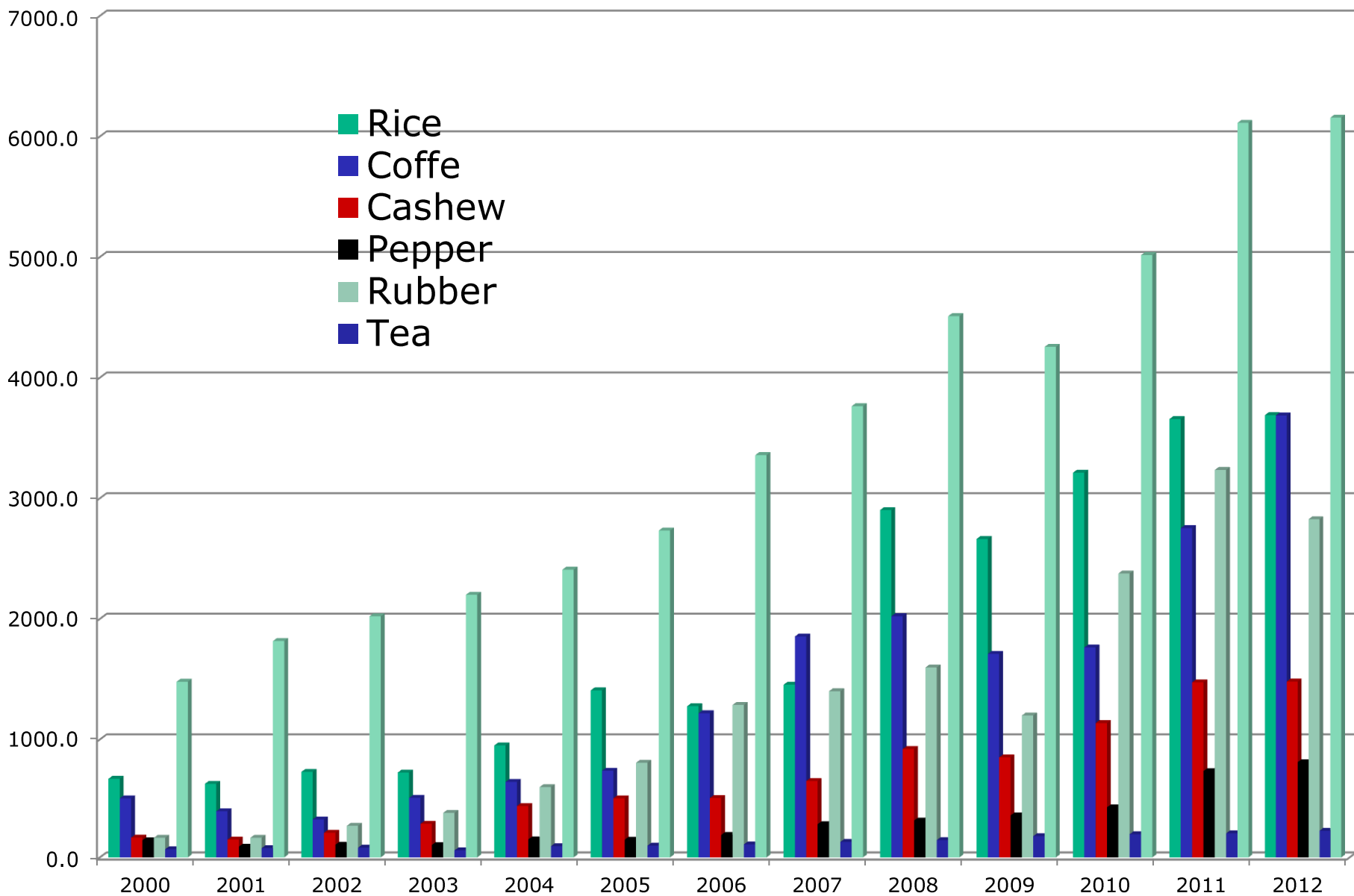
Vietnam agriculture and food issue in 2030

Dang Kim Son

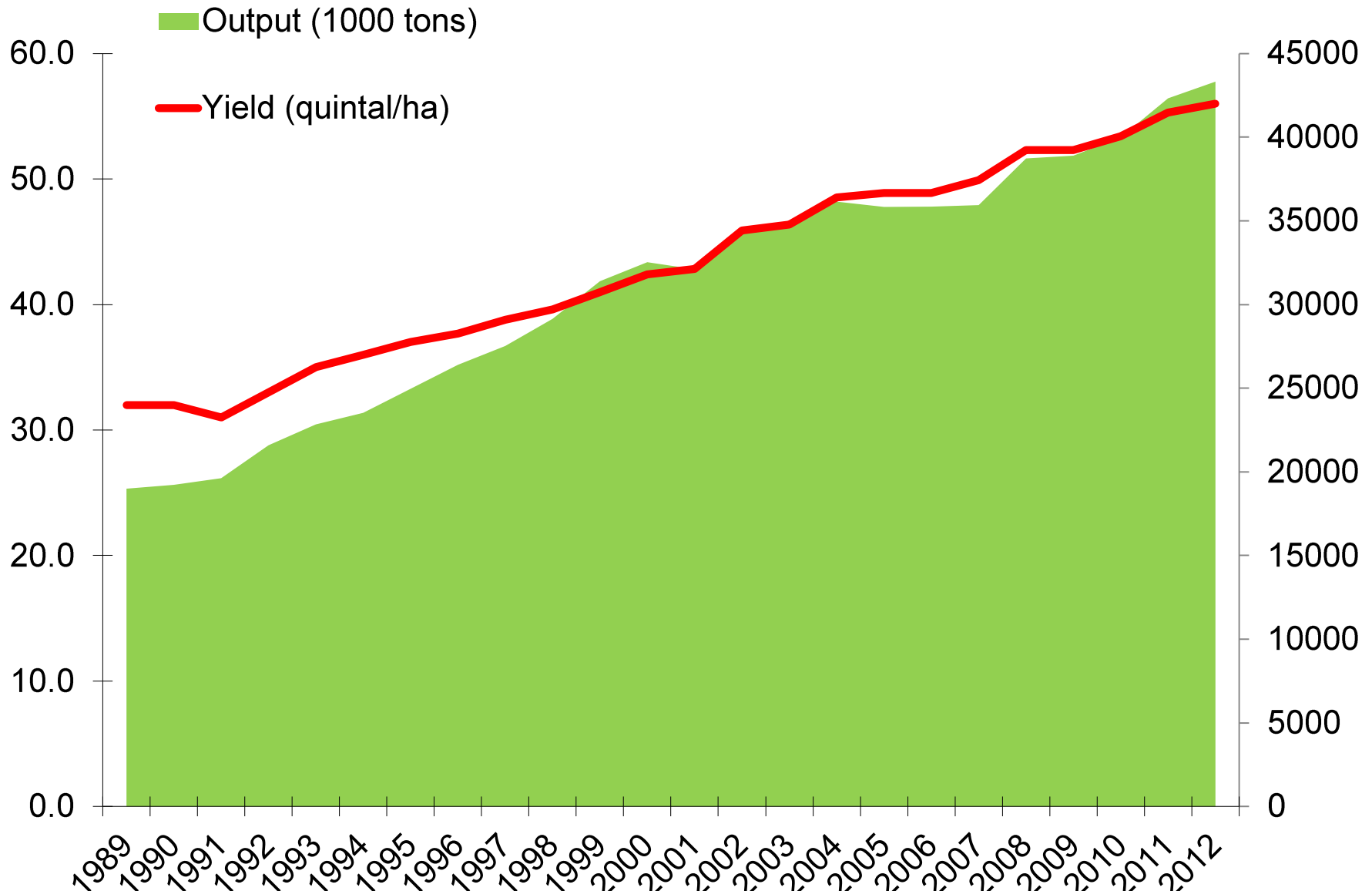
Agricultural Growth in Vietnam



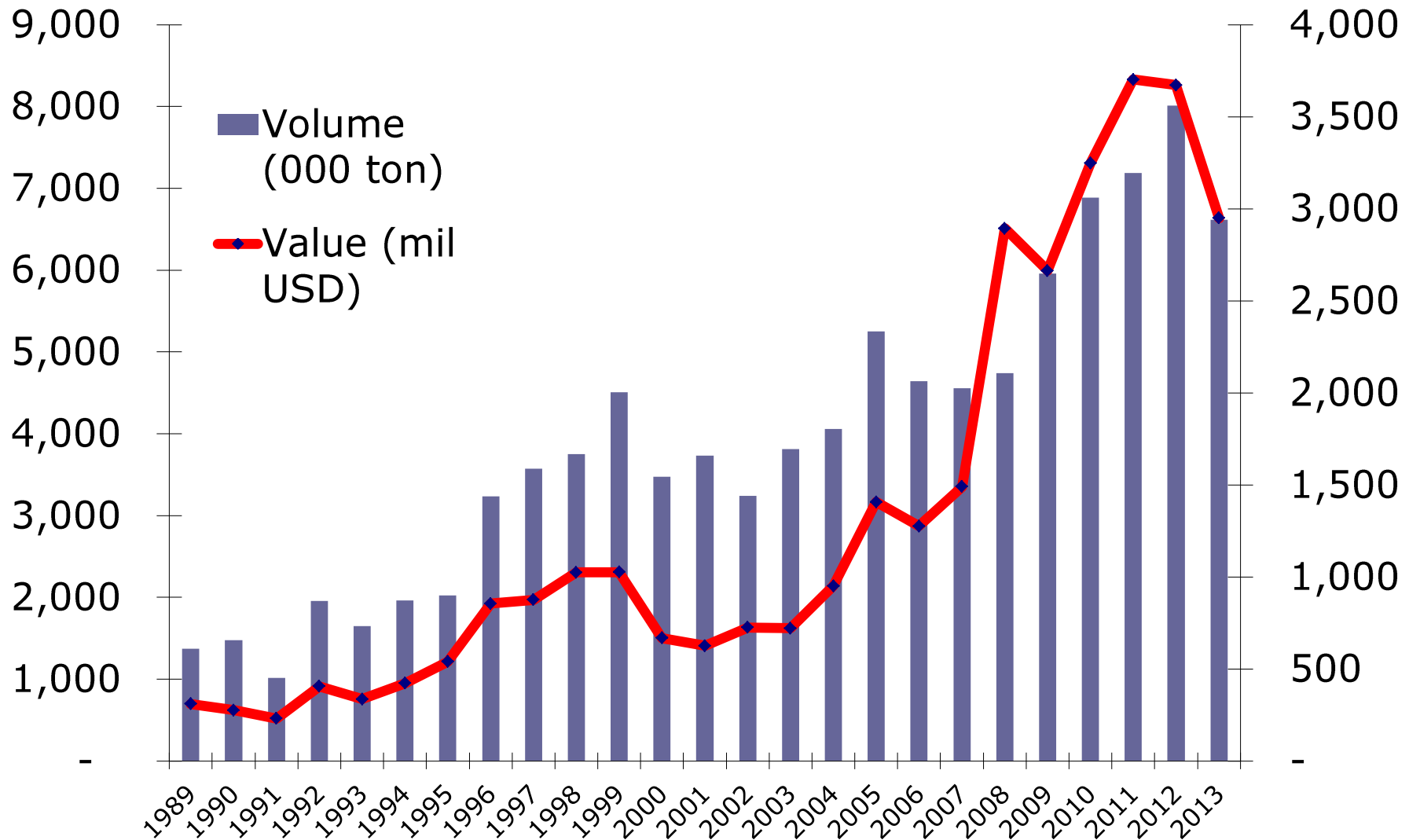
Vietnamese Agricultural trade



Paddy production continues growing



Rice export - volume and value



Food security and nutrition status core indicators

Food consumption	Health status	Nutritional status
Calorie supply per capita (2003-2005) 2650* kcal/person/day	Life expectancy at birth(2007) 74	Proportion of children under 5 underweighted (2006) 20%
Cereals, roots, tubers as % of DES** (2003-2005) 68%	Under 5 mortality rate (2000) 30/1000	
Percentage of population undernourished (2004-2006) 13%		

(*) Minimum dietary energy requirement (2004-2006): 1800 kcal/person/day.

(**) Dietary Energy Supply

(***) Body Mass Index

Vietnam's Rice Balance in 2030

Scenarios	Projection in 2030		
	Paddy quantity	Rice consumption	Rice export
3.8 mil ha	40.3	12.7	5.2
3.6 mil ha	38.2	12.7	4.1
3.3 mil ha	35.0	12.7	2.4
3.0 mil ha	31.8	12.7	0.8

✓ *Population: 110 million, consumption: 120 kg per head*

✓ *Urbanization rate: 42%, Yield: 5.8 tons/ha. Post-harvest losses: 10%*

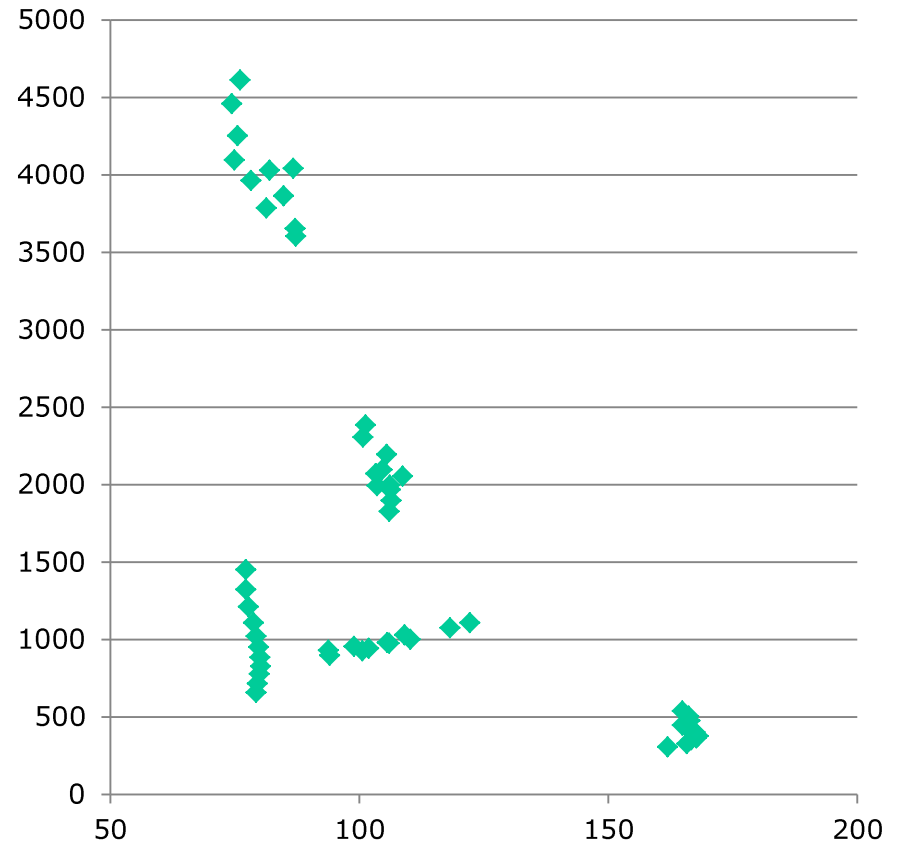
Source: WB, 2011

VN Per Capita & Total Rice Consumption Has Begun to Decline

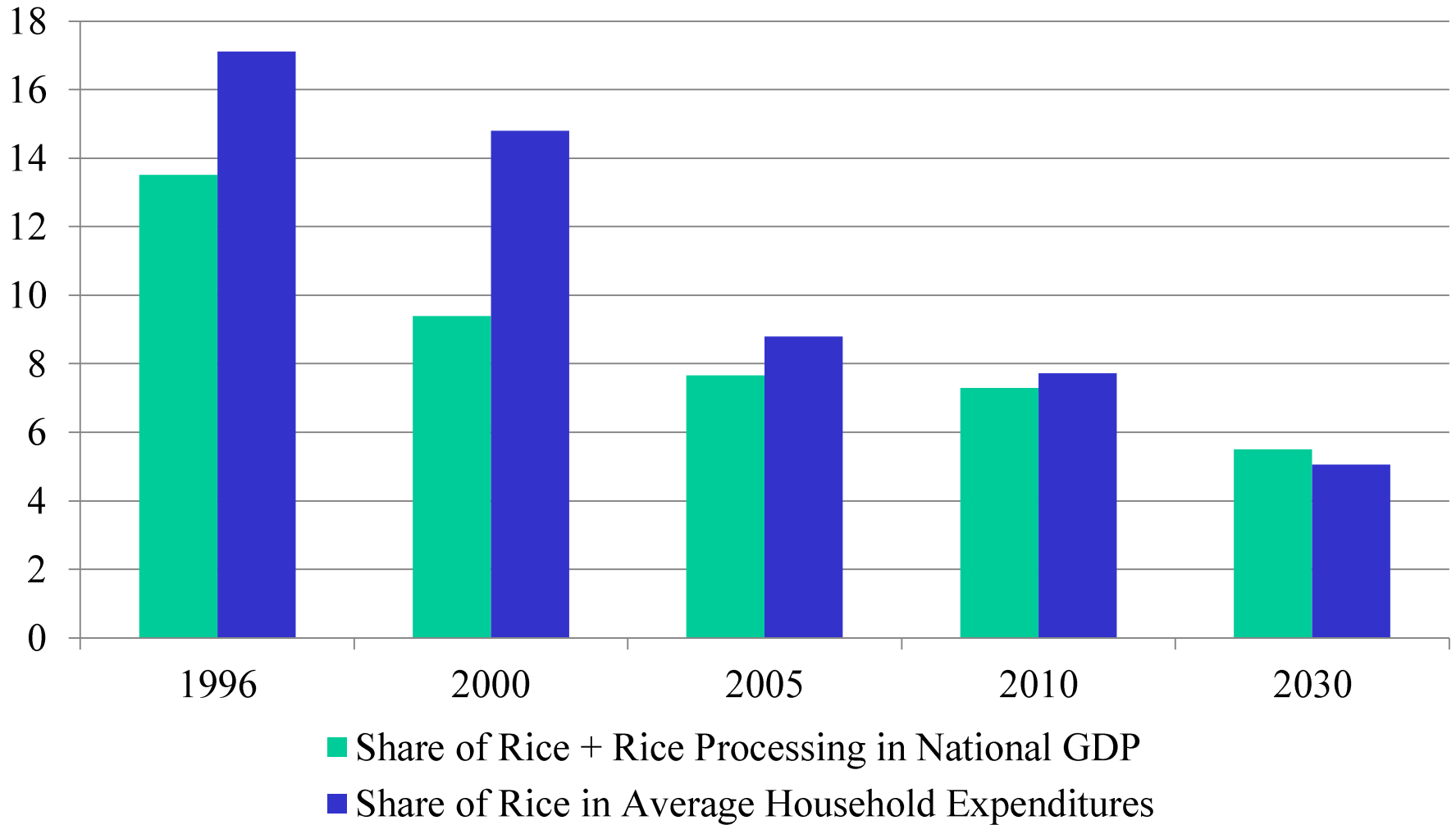
P.C. Rice Consumption In Asia (Kg/Yr)

Myanmar	160
Vietnam	135
Philippines	128
Indonesia	104
China	95
Korea	88
Malaysia	80
India	77
Japan	45

PC Rice Consumption and PC Income:
China, Vietnam, Malaysia, Thailand, and
Philippines, 1995-2005



Changing economic role of rice



Source: Steve Jaffee, WB, 2011

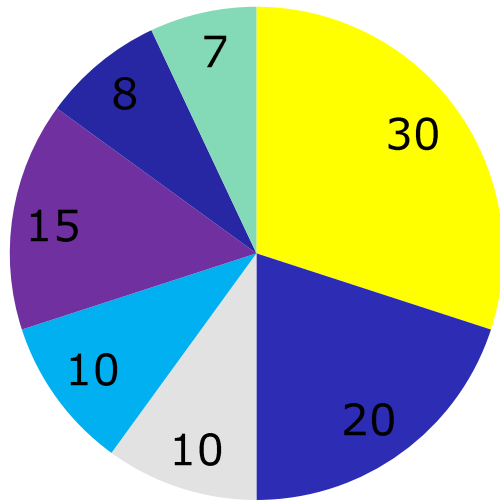
More rice cannot solve all problems of food insecurity

Indicators	90-92	95-97	00-02	05-07
Malnutrition rate (%)	31	22	17	11
Number of Malnourished people (million)	21.0	16.7	13.3	9.6
Minimum calorie request (Kcal/person/day)	1710	1740	1780	1810
Calorie consumption (Kcal/person/day)	2090	2310	2520	2770

Source: FAO, <http://www.fao.org/hunger/en/>

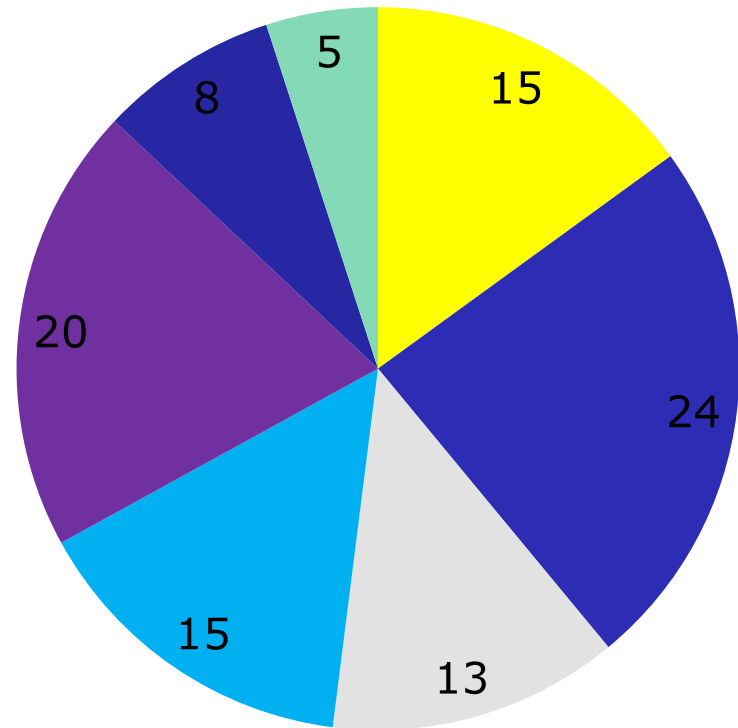
Domestic Market Growth: Changing Size/Composition of Food Expenditure

2010: \$30 billion



■ Cereals/Tubers ■ Meat ■ Fr/Veg
■ Fish ■ Out of home ■ Beverages
■ Sugar/Sweets

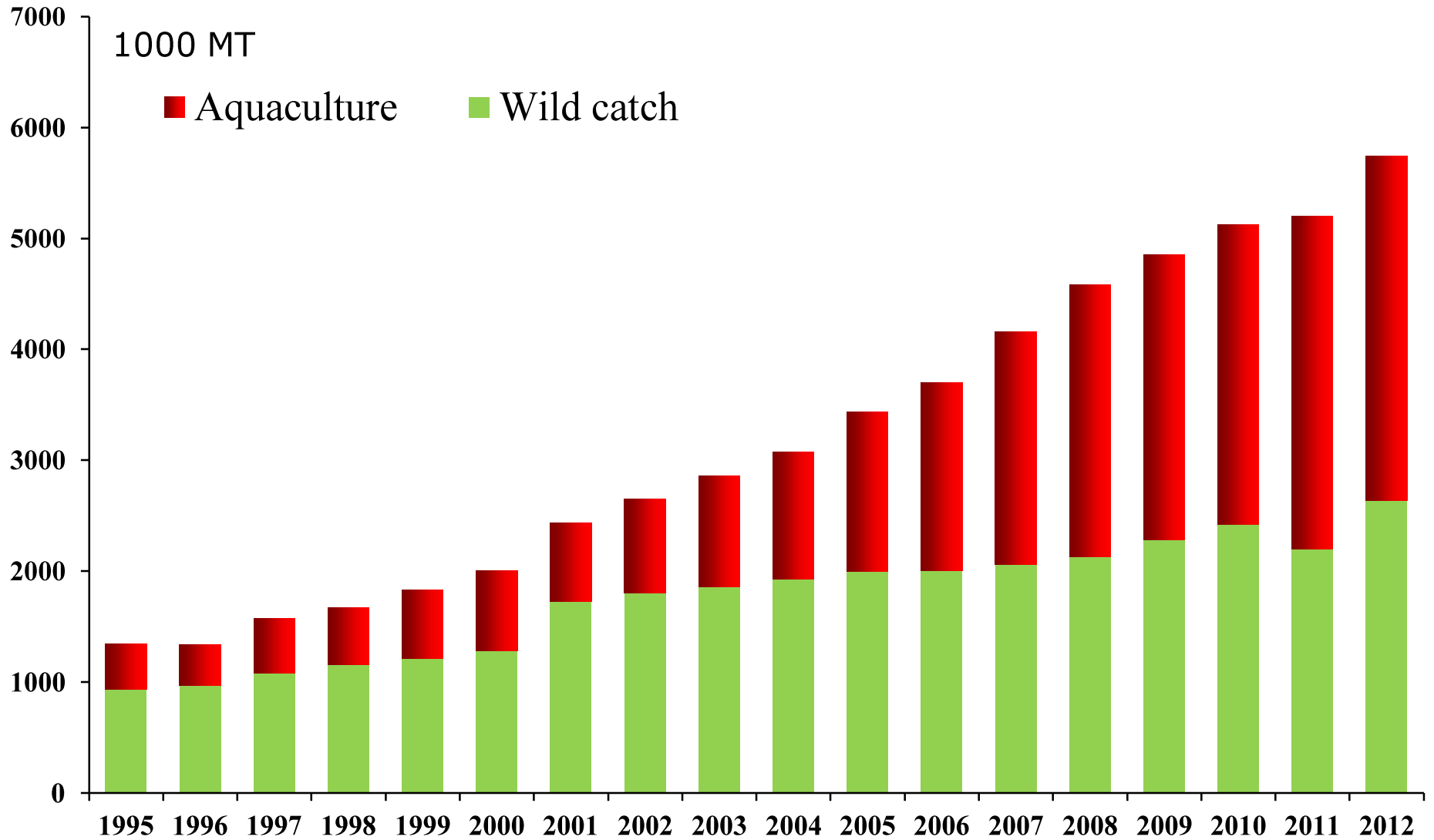
2020: \$65 -70 billion?



■ Cereals/Tubers ■ Meat ■ Fr/Veg
■ Fish ■ Out of home ■ Beverages
■ Sugar/Sweets

Source: WB

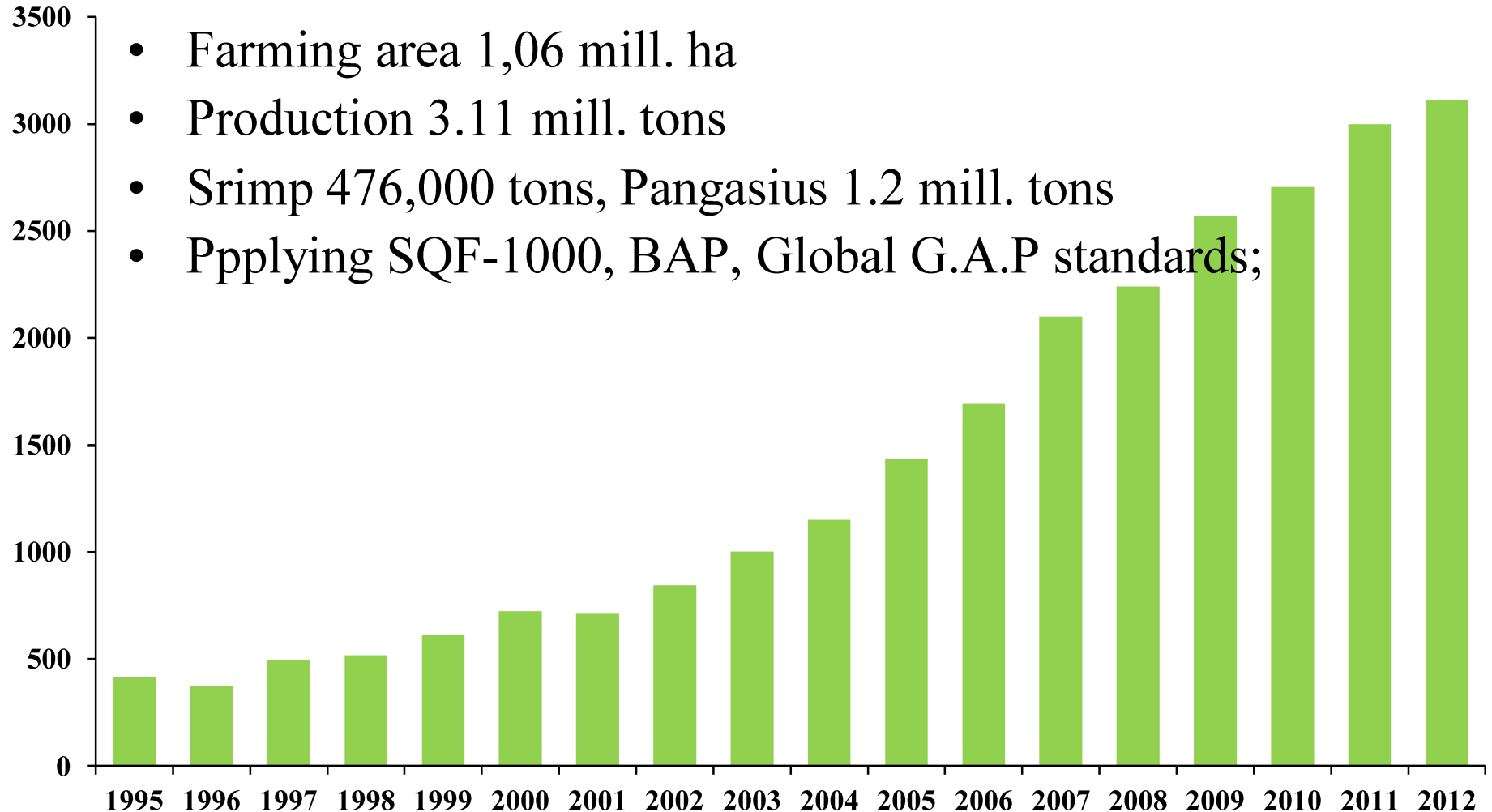
Vietnam Fisheries Production



Vietnam Aquaculture Production

1000 MT

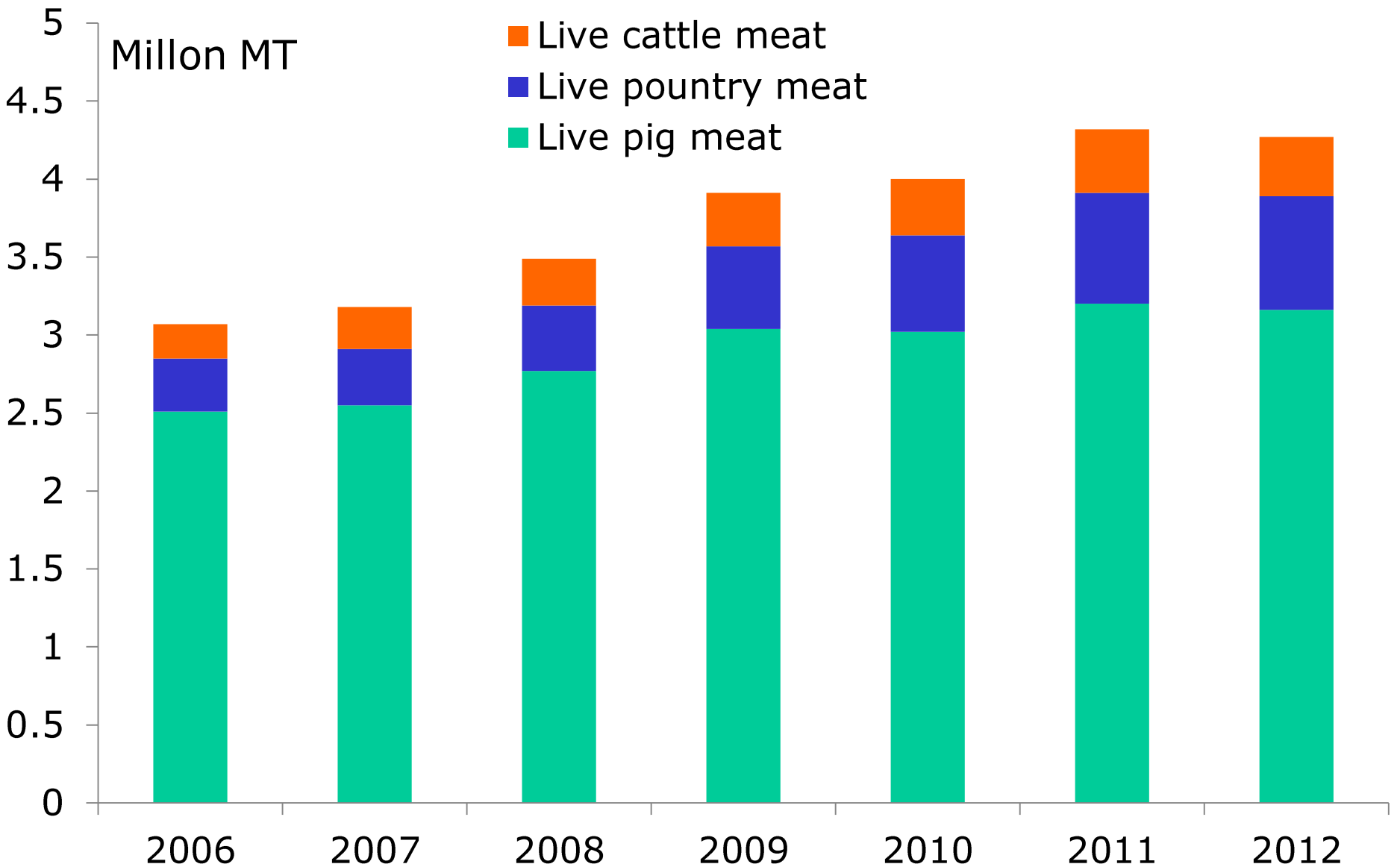
- Farming area 1,06 mill. ha
- Production 3.11 mill. tons
- Shrimp 476,000 tons, Pangasius 1.2 mill. tons
- Applying SQF-1000, BAP, Global G.A.P standards;



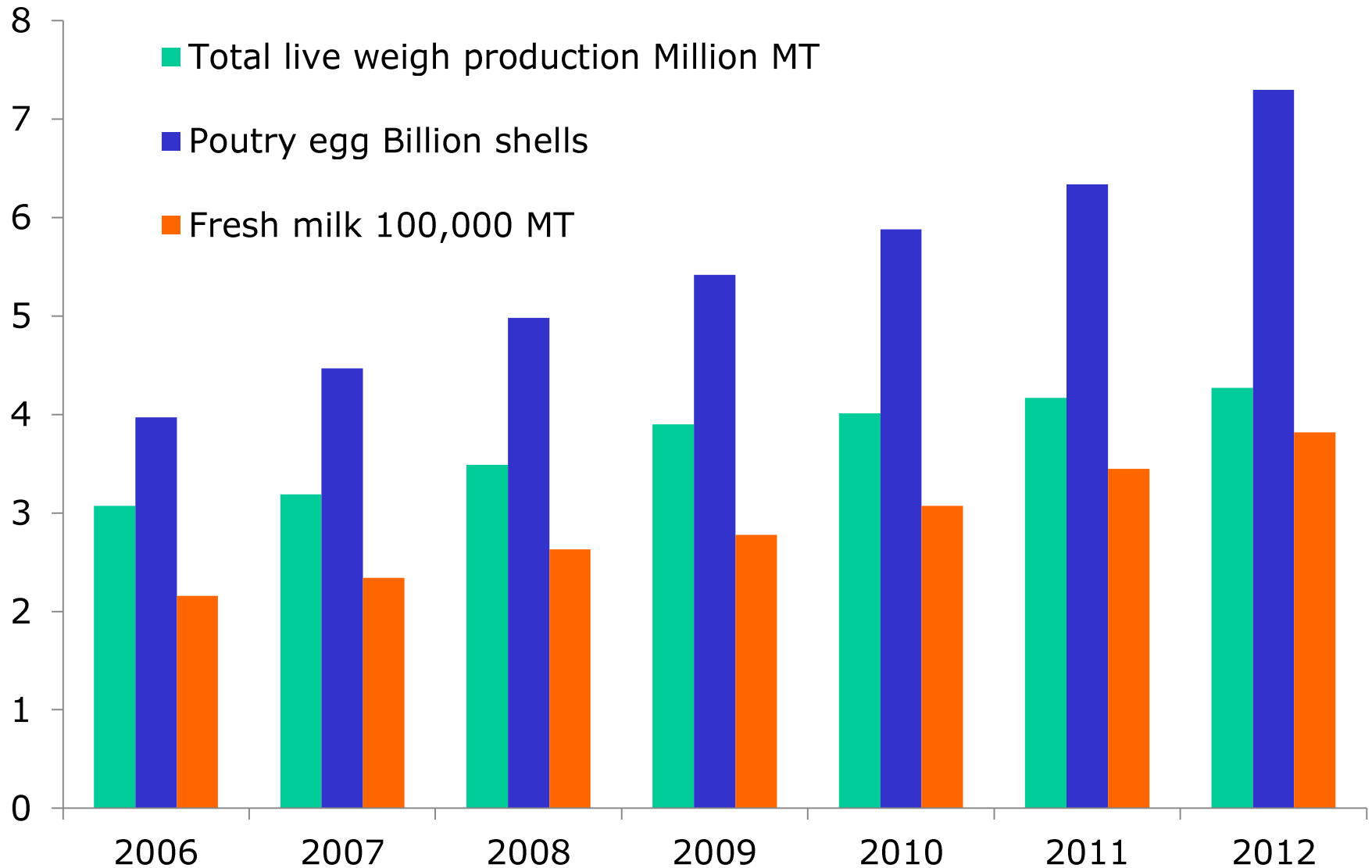
Meat consumption in Vietnam

	2006	2007	2008	2009	2010	2011	2012
Population (million)	84.2	85.2	86.2	86.2	86.9	87.8	88.8
GDP/Capita (USD/P)	337	843	1070	1130	1224	1411	1600
Meat consumtion (kg live weigh meat/p)	36.5	37.4	40.5	46.3	46.1	47.5	48.1

Vietnam meat production



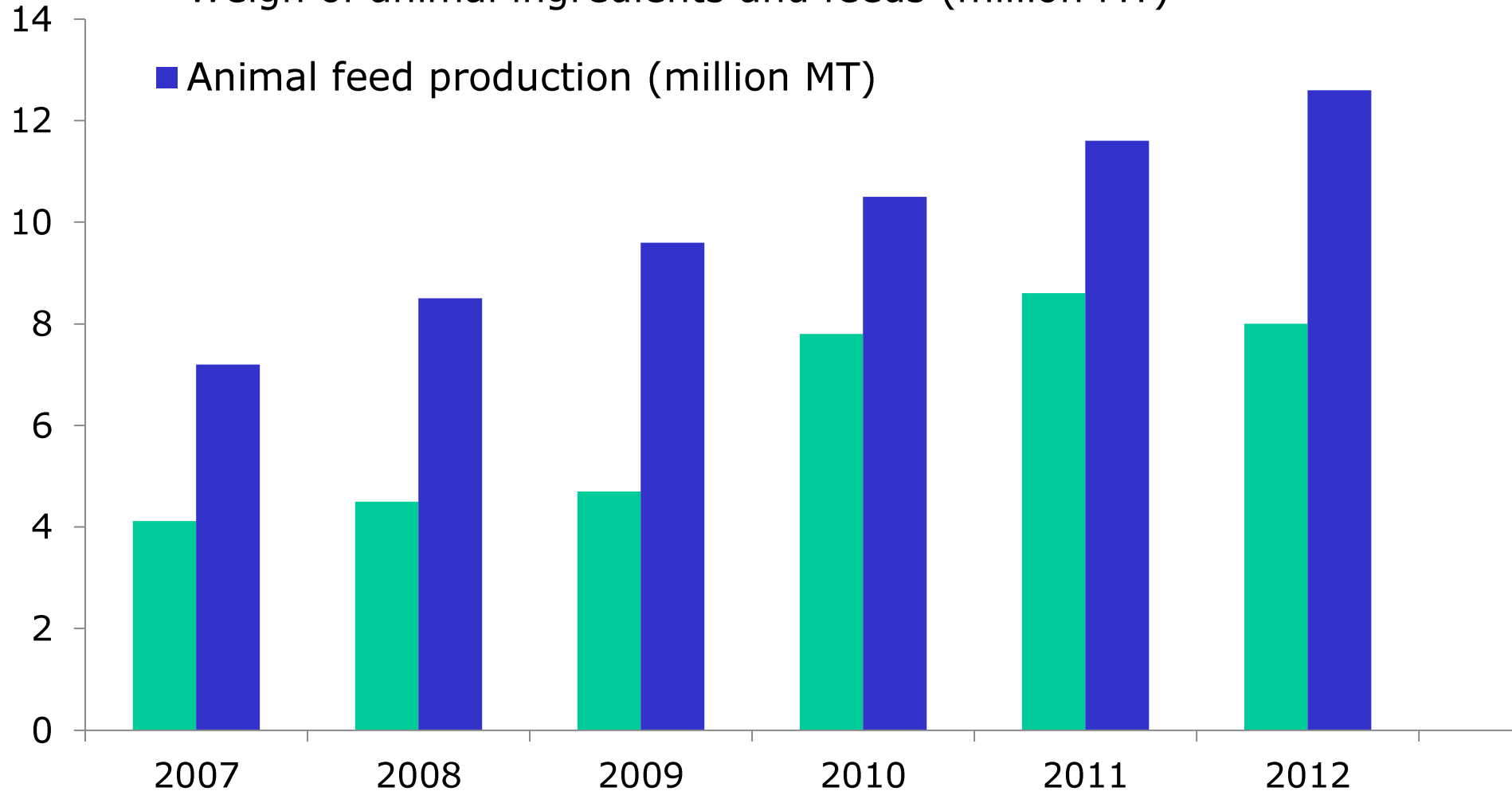
Vietnam Livestock production



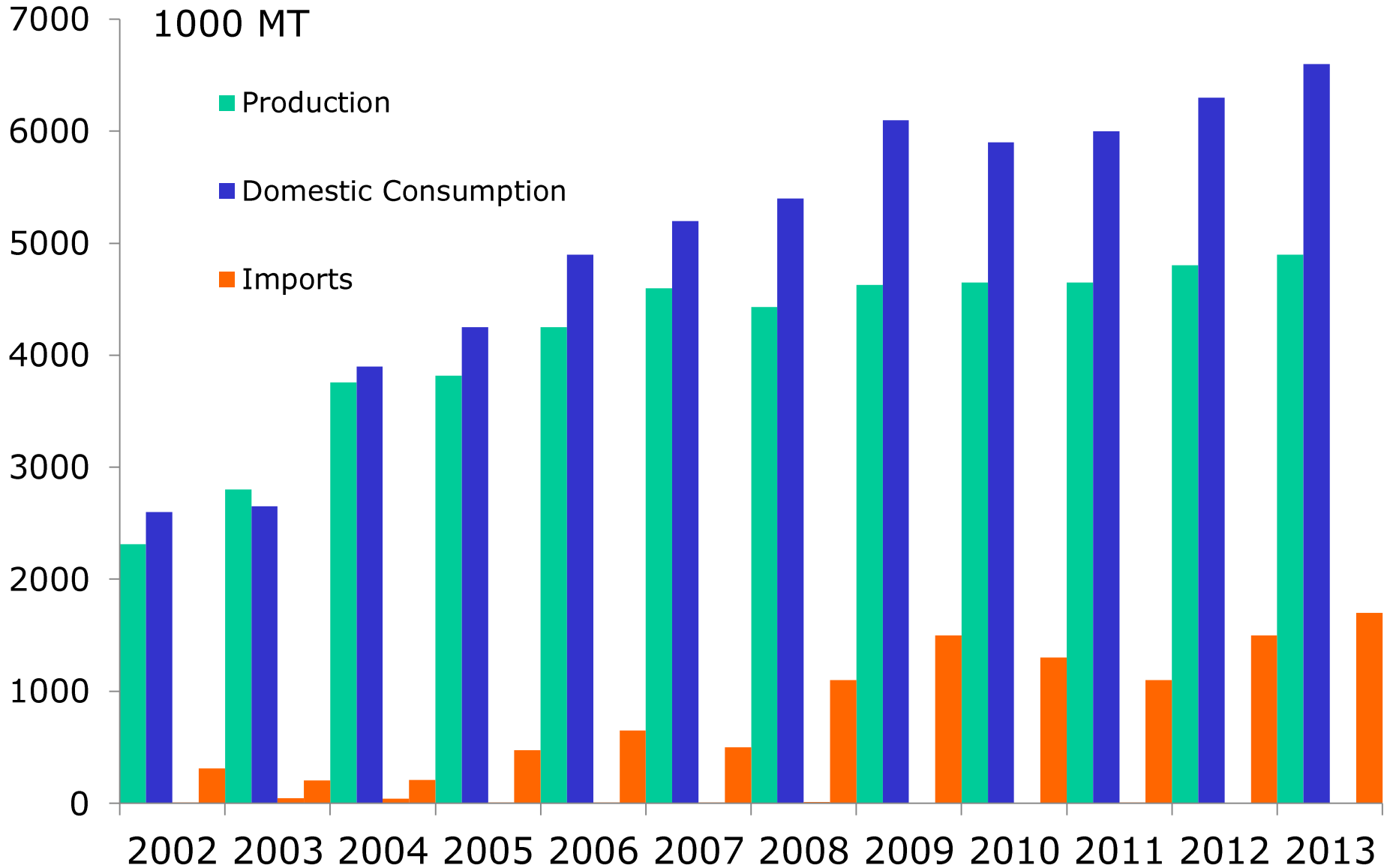
Production and imports ingredients and feeds imported

■ Weigh of animal ingredients and feeds (million MT)

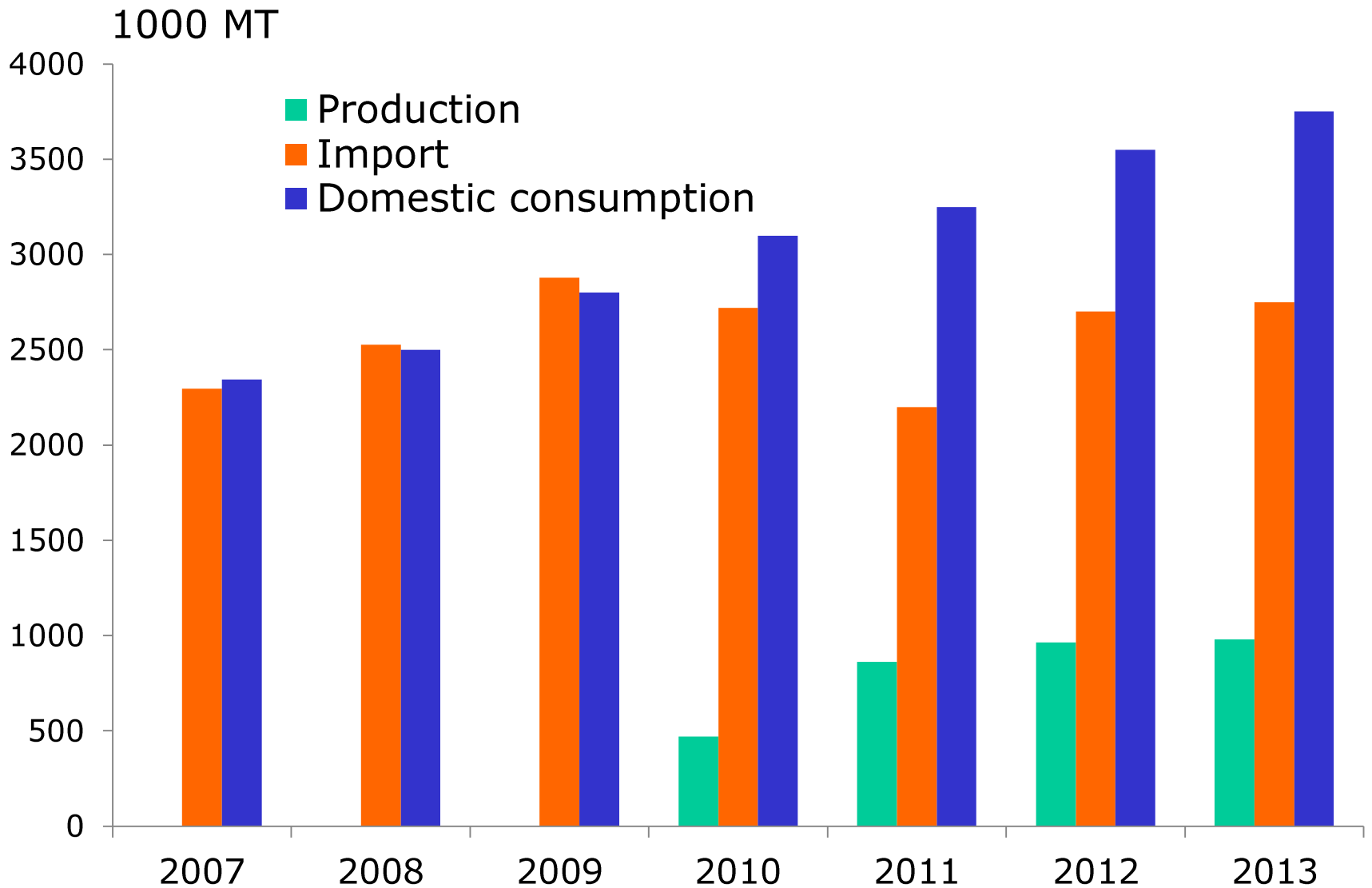
■ Animal feed production (million MT)



Maize supply and demand



Soy bean supply and demand

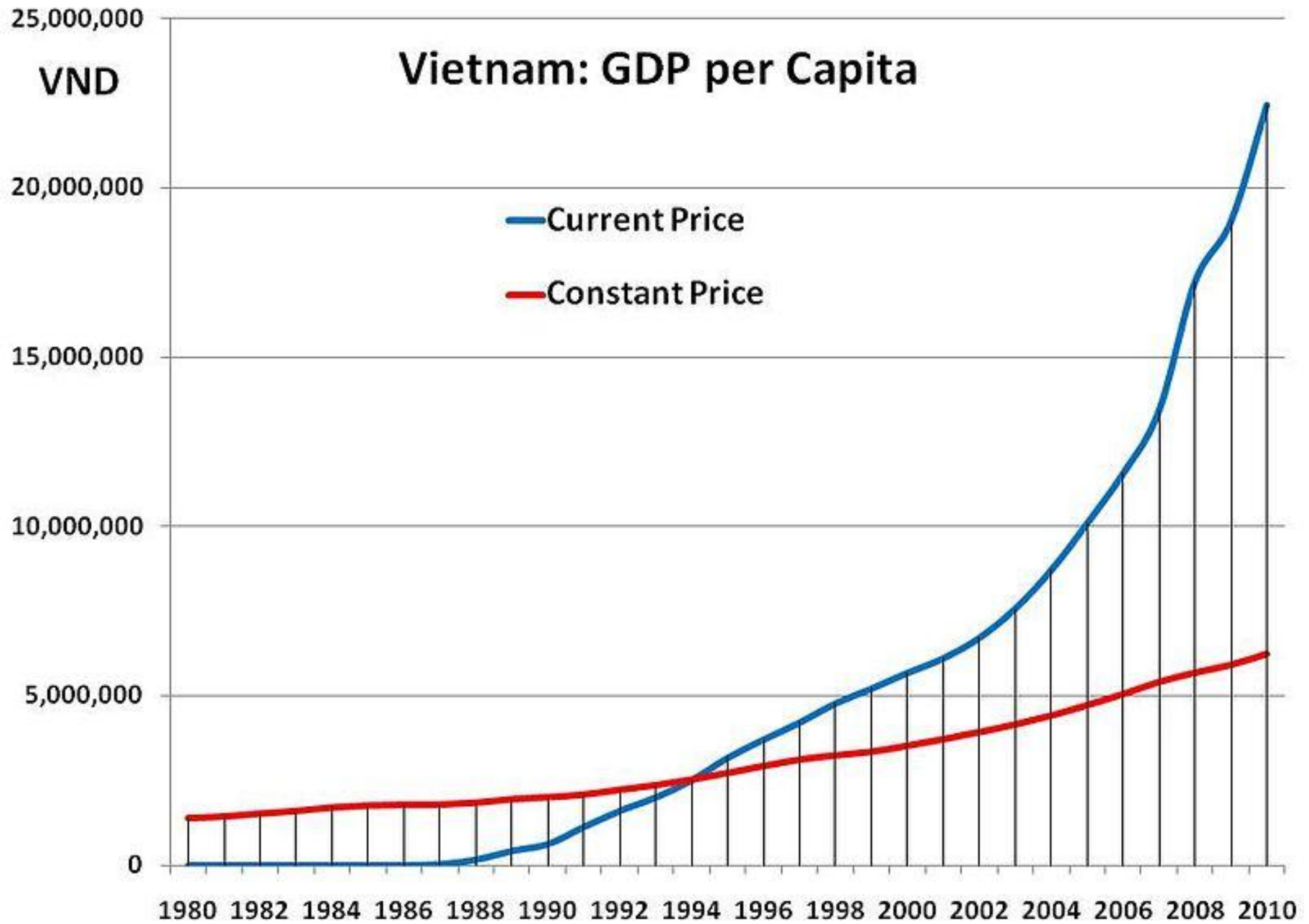


Vietnam: GDP per Capita

VND

— Current Price

— Constant Price





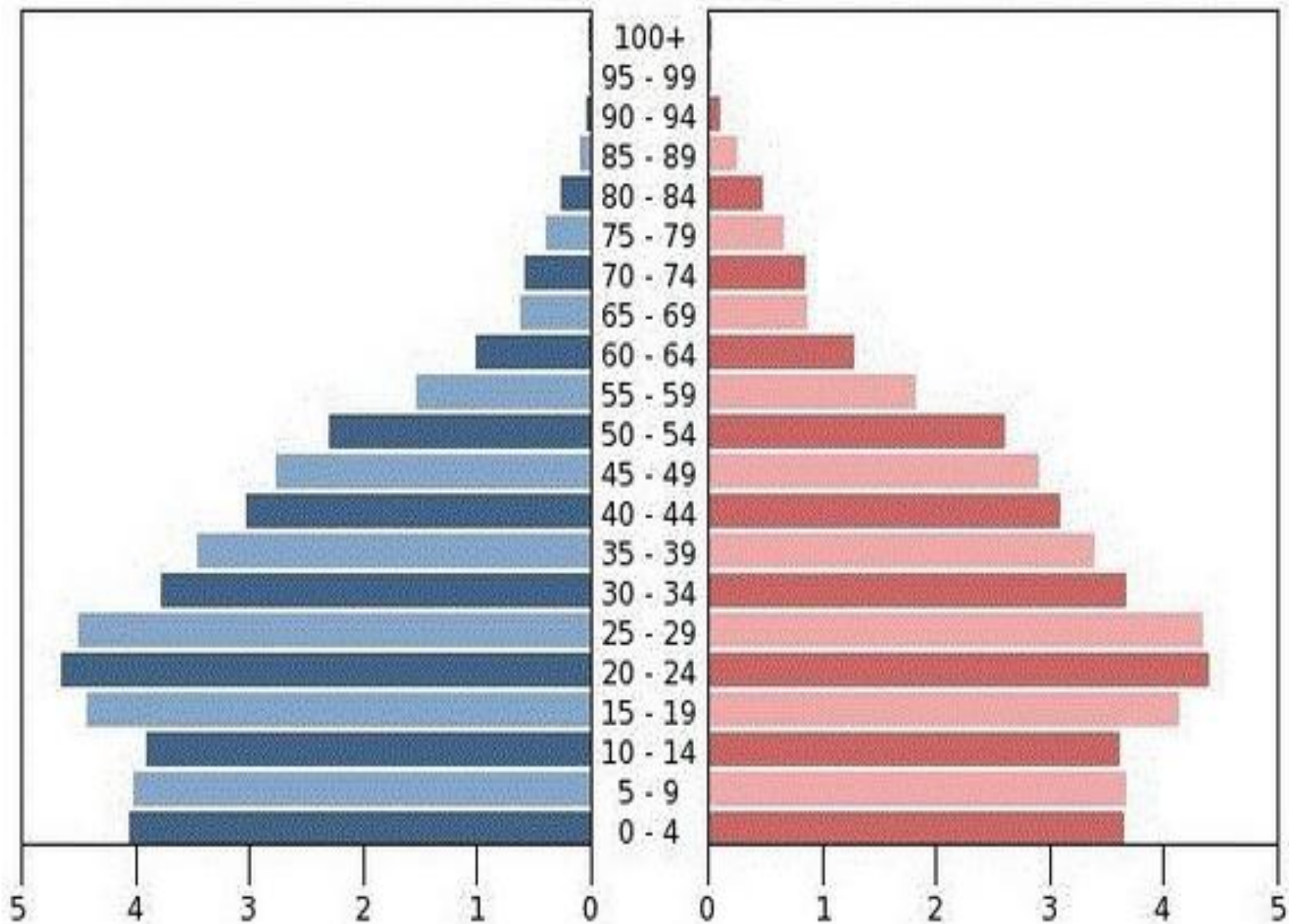
Commercial feed production by ownership (1000 tons):

Ownership types	2010		2011		2012	
	Production	%	Production	%	Production	%
State & Private	4.3	40.9	4.5	5.3	5.3	41.7
Joint-venture & 100% FDI	6.2	59.1	7.0	60.8	7.4	58.3
Total	10.5	100	11.5		12.7	

Nam

Vietnam - 2011

Nữ



Dân số (triệu người)

CHANGING APPROACH

Current Approach	New Approach
Protect paddy land	Protect agricultural land
Rice self-sufficiency	Increase farmer income and improved nutrition
Resource intensive	Technology intensive and environmental friendly practices
Production focus	Post-harvest and trade focus
Small farm and middleman domination	Large scale and value chain linkage
Administrative control	Market-based intervention
Food export	Utilize the benefit of international integration
Inflation control	Target to poor and vulnerable groups of consumers

Transforming Vietnam Agriculture

Realizing “More from Less”

- More producer and consumer welfare,
- Less restrictions, costs, resources, and adverse environmental impacts
- Not more volume but more value (and demand focus)
- More sustainable and more flexible primary production
- Beyond ‘natural endowment’ to innovation + value addition

Communicating this transformation

- Re-branding/re-positioning VN agriculture at home and abroad
- VN products are safe, of high quality, sustainably produced, and reliably supplied.....and we ensure this
- The VN agri-food sector is “open to business”



Thank you