



Sustainability  
through  
Diversity



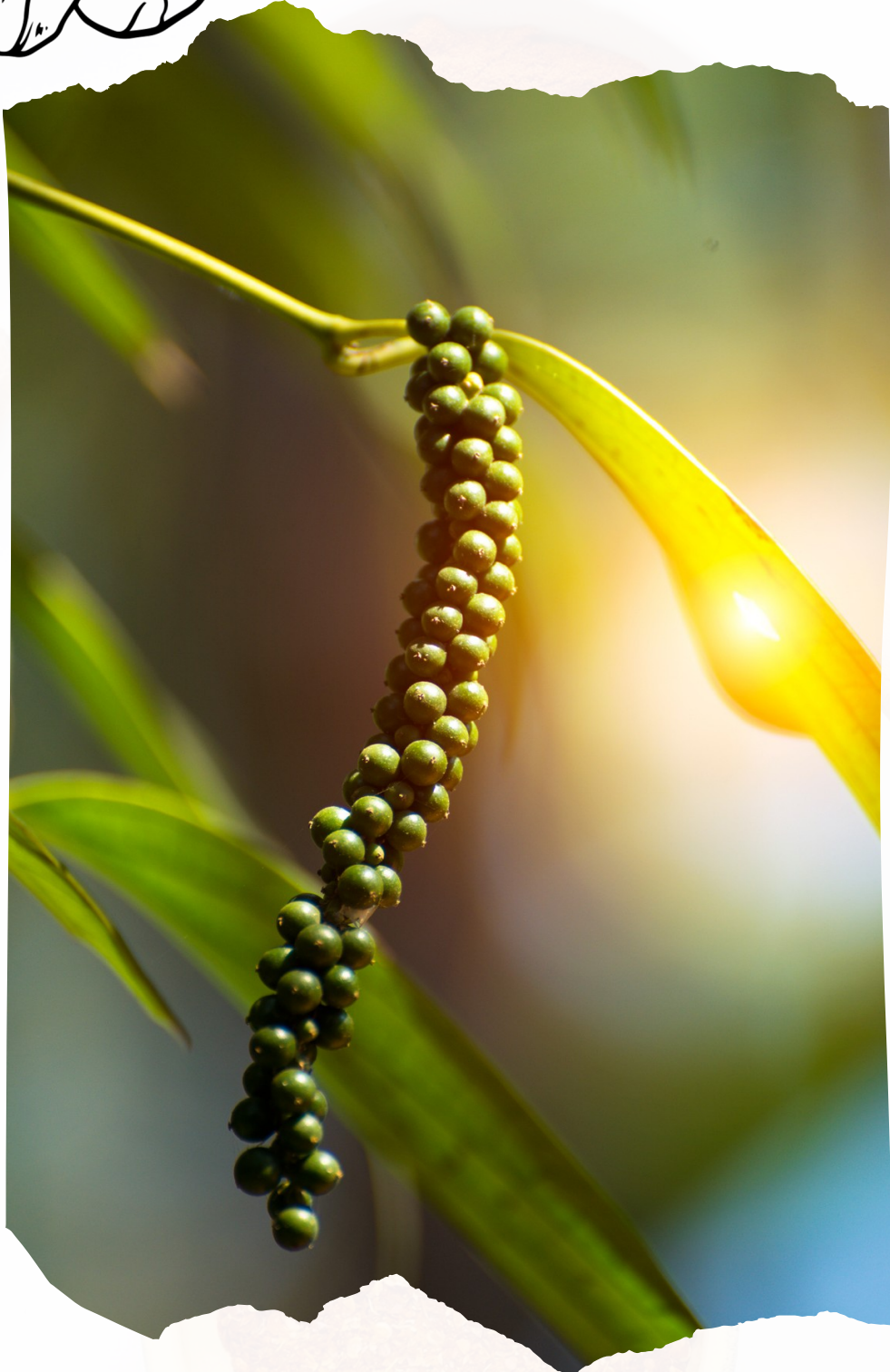
# VIET NAM SPICE INDUSTRY

Ms. Hoang Thi Lien - Chairperson of VPSA

15-17 September, 2023

Mumbai, India





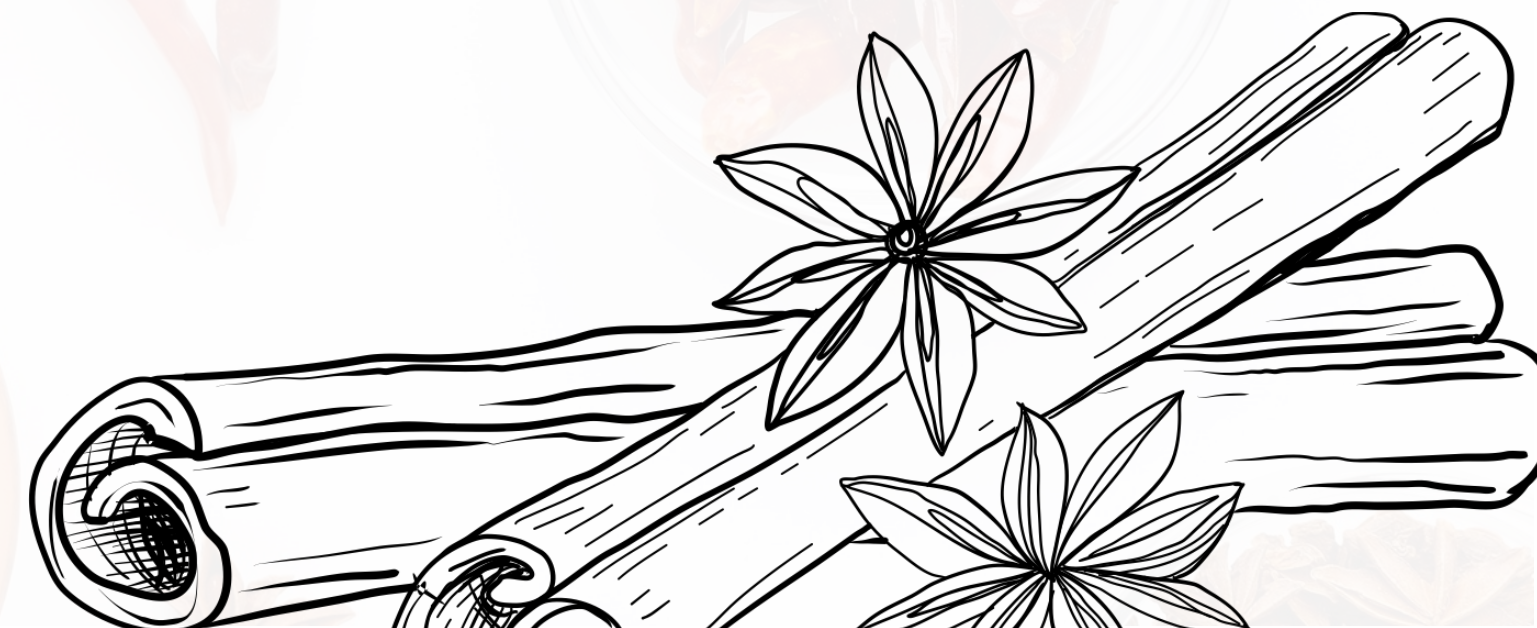
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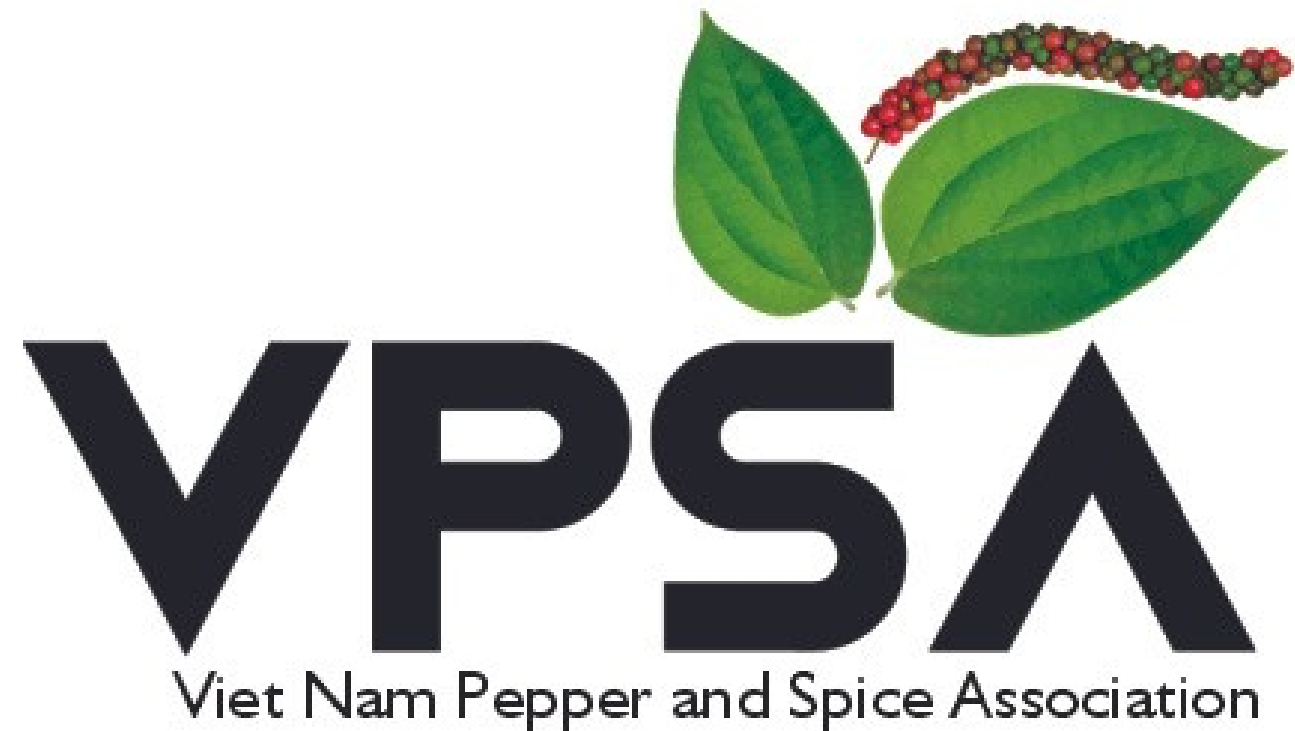
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# ABOUT VPSA

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“ SUSTAINABLE THROUGH  
DIVERSITY ”

## 2001

Viet Nam Pepper Association was officially established with 34 members.

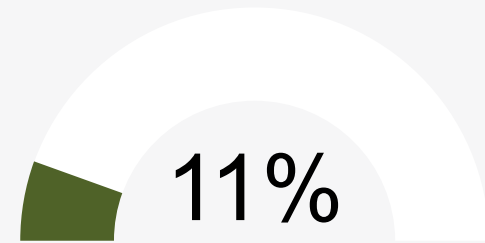
## MARCH 2023

Viet Nam Pepper Association changed to Viet Nam Pepper and Spice Association which expanding scale to the whole spice industry.

## NOW

120 members, including major Vietnamese businesses engaged in the production, trade, and export of spices, as well as international businesses and allied farmer cooperatives.

# VIET NAM SPICE OVERVIEW



11%

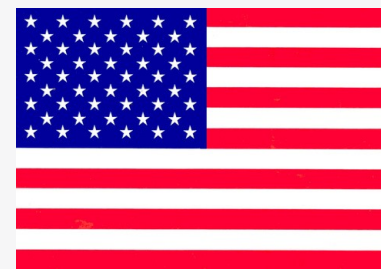
## Viet Nam Spice Market share

Viet Nam is one of the world's major spice producers and exporters. The average export volume accounts for 11% of the global market share in 2022 (according to ITC).

## \$ 2.0 Billion

It is expected that in 2025, the total export turnover of Vietnamese spices would reach 2.0 billion USD.

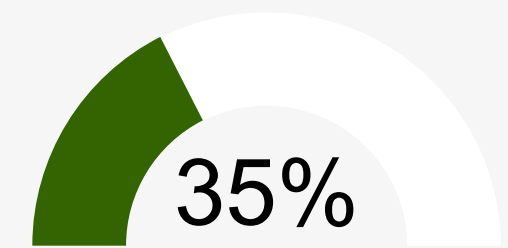
## Main market



## India Import

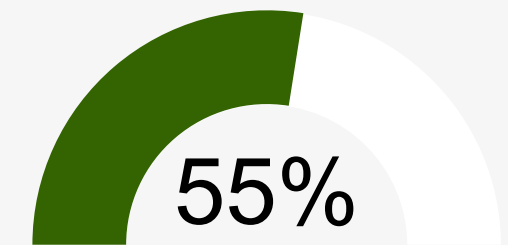
Viet Nam's main spice export market has always been India. India is the largest importer of Vietnamese cassia and star anise, with market shares of 42.8% and 41.3% in 2022, respectively.

## Viet Nam Pepper Market Share



35%

Output



55%

Export

Vietnam has always been the world's largest pepper exporter, accounting for 35% of output and 55% of global export market share.

# PRODUCTS – MAIN MARKET



Pepper

China, US, EU,  
India, Middle East...



Cassia

India, America,  
Bangladesh, China...



Star Anise

India, China



Chili: China



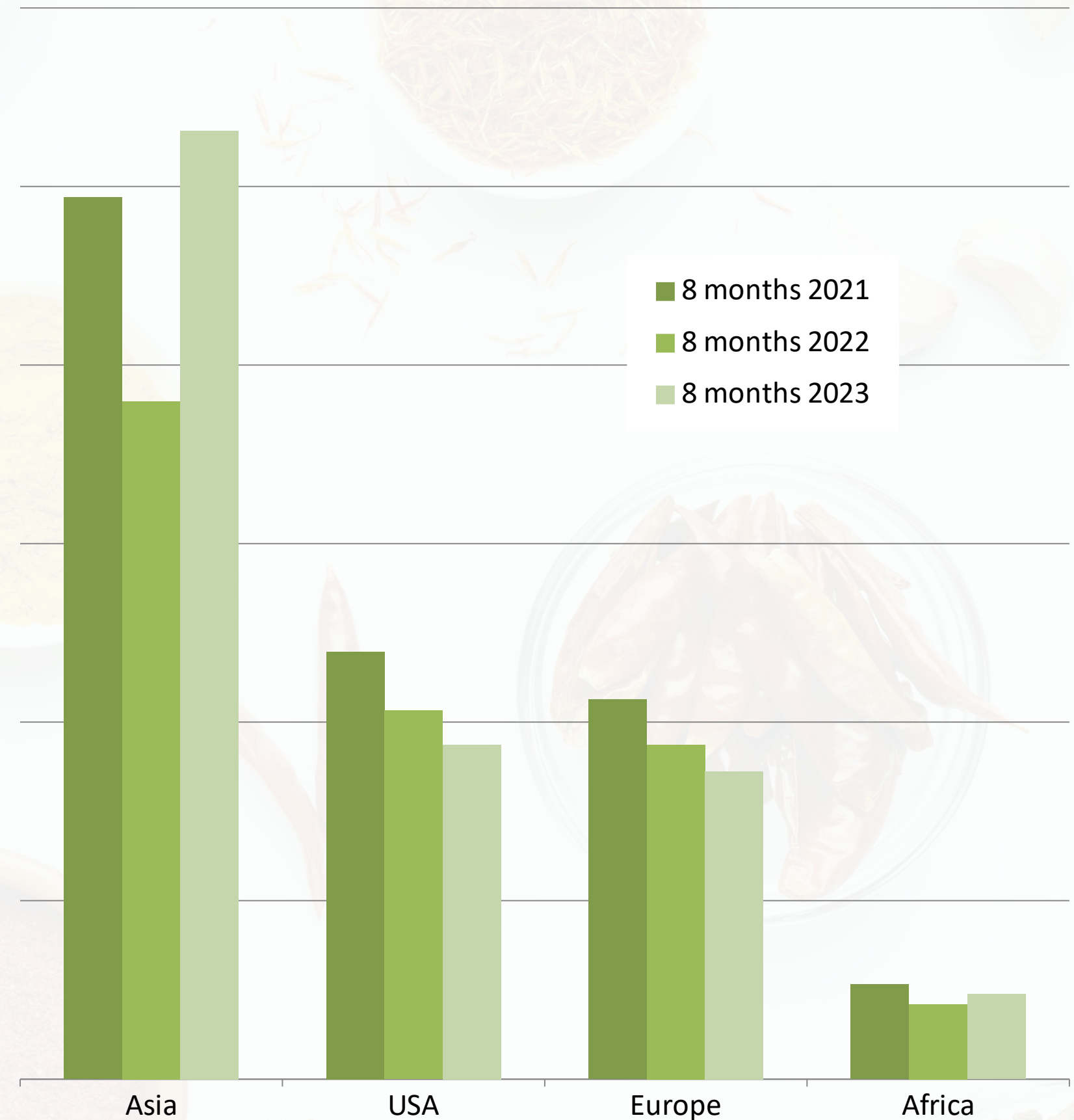
Ginger, Turmeric:  
India, China, US



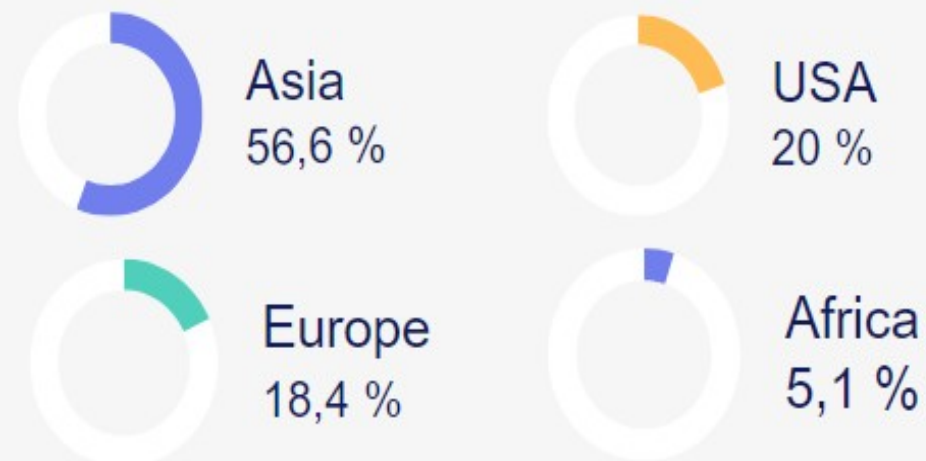
Green, Black  
Cardamom: US, EU

# PEPPER - EXPORT 8 MONTHS OF 2021 – 2022 - 2023

Market	8 months 2021	2021	8 months 2022	2022	8 months 2023	% +/- 23/22
<b>USA</b>	47.866	65.693	41.294	60.099	37.482	- 9,2
<b>Europe</b>	42.525	62.549	37.481	53.543	34.495	- 8,0
<b>Asia</b>	98.772	120.801	75.945	105.916	106.258	39,9
<b>India</b>	10.280	12.557	10.821	12.297	8.246	-23,8
<b>Africa</b>	10.605	14.649	8.410	12430	9.520	13,2
<b>Total</b>	<b>199.768</b>	<b>263.692</b>	<b>163.130</b>	<b>231.988</b>	<b>187.755</b>	<b>15,1</b>

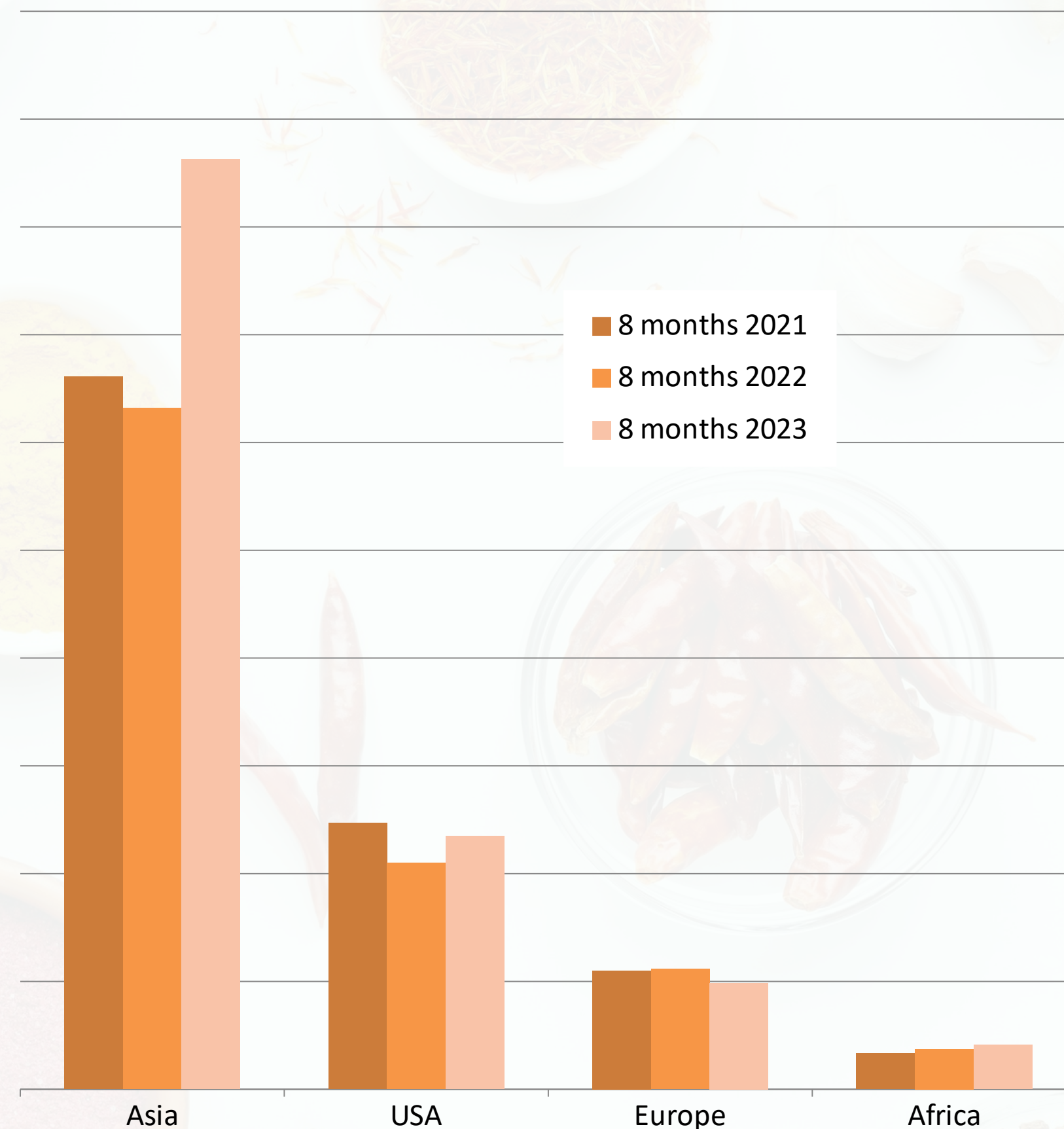


Market share 2023

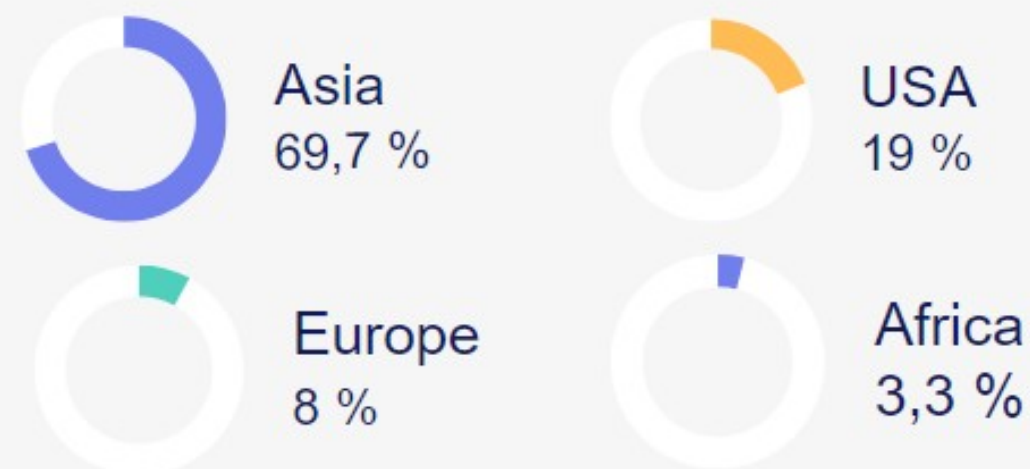


# CASSIA - EXPORT 8 MONTHS OF 2021 – 2022 - 2023

Market	8 months 2021	2021	8 months 2022	2022	8 months 2023	% +/- 23/22
<b>USA</b>	12.342	19.156	10.490	15.394	11.738	11,9
<b>Europe</b>	5.500	9.207	5.579	8.948	4.924	-11,7
<b>Asia</b>	33.053	47.164	31.594	50.534	43.129	36,5
<b>India</b>	20.390	28.227	20.352	33.359	27.280	34,0
<b>Africa</b>	1.658	3.060	1.856	3.120	2.061	11,0
<b>Total</b>	<b>52.553</b>	<b>78.587</b>	<b>49.519</b>	<b>77.996</b>	<b>61.852</b>	<b>24,9</b>



Market share 2023

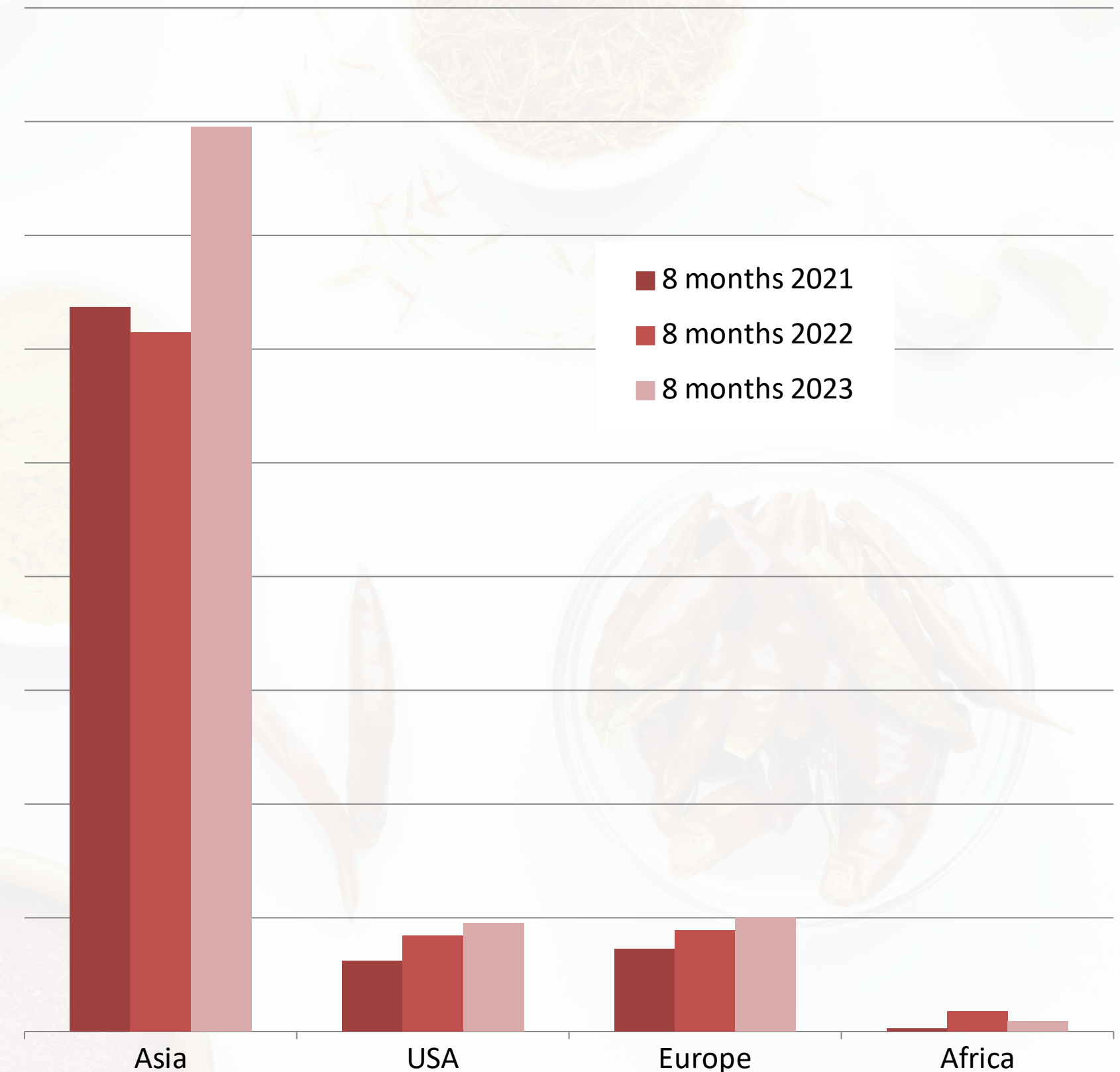


Unit: ton



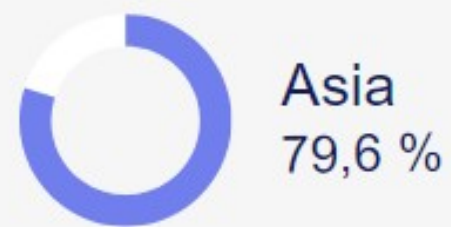
# STAR ANISE - EXPORT 8 MONTHS OF 2021 – 2022 - 2023

Market	8 months 2021	2021	8 months 2022	2022	8 months 2023	% +/- 23/22
USA	619	1.329	843	1.233	954	13,2
Europe	723	1.762	891	1.507	998	12,0
Asia	6.365	11.253	6.147	9.811	7.952	29,4
India	3.703	7.669	3.924	5.309	5.720	10,0
Africa	24	305	179	304	92	-48,6
<b>Total</b>	<b>7.731</b>	<b>14.649</b>	<b>8.060</b>	<b>12.855</b>	<b>9.996</b>	<b>24,0</b>



Market share 2023

Unit: ton



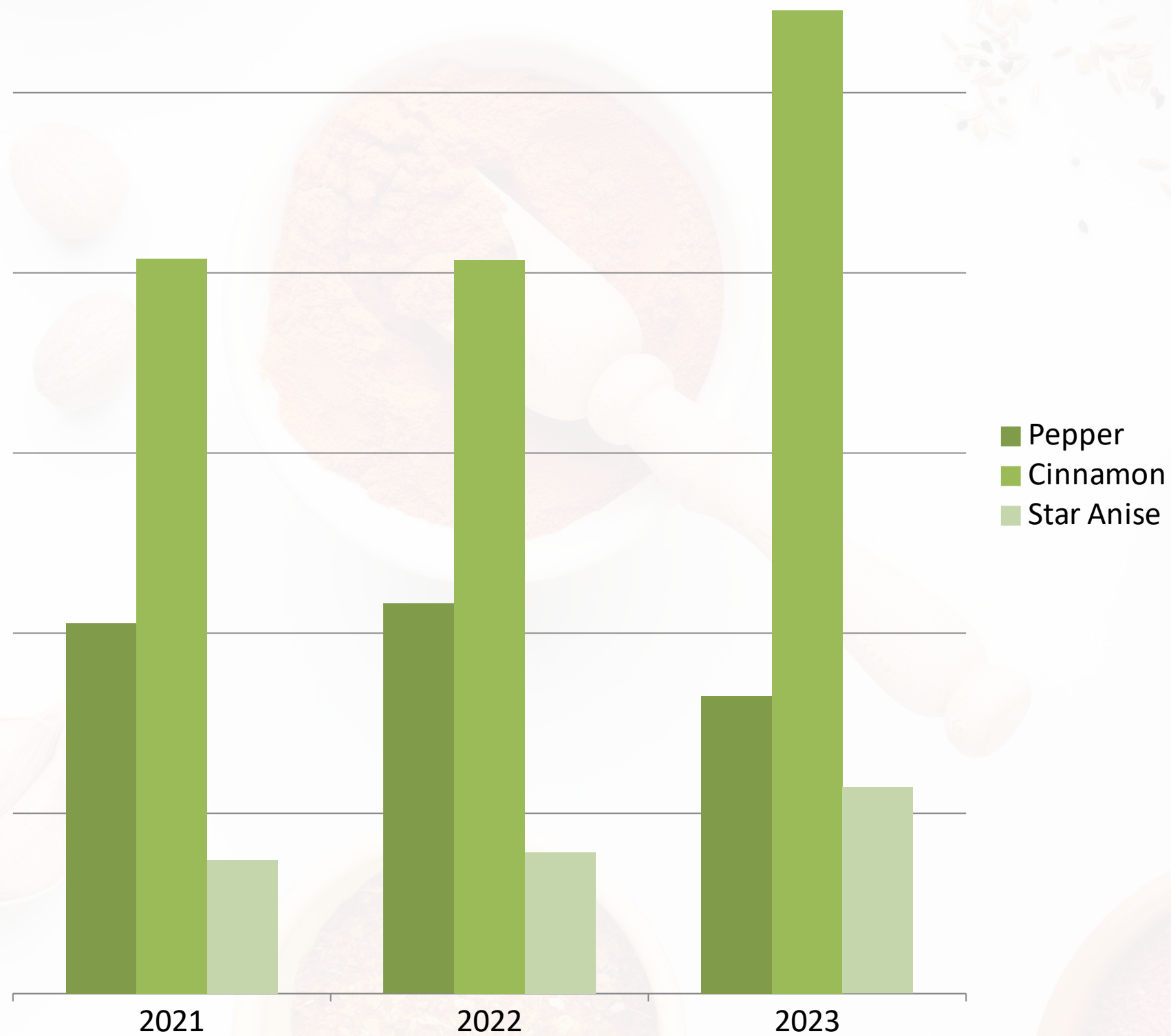
# SPICE - EXPORT 8 MONTHS OF 2022 - 2023

<i>*as of 6 months</i> <i>Unit: ton</i>	8 months 2022	Total 2022	8 months 2023	% +/- 8 months 23/22	% Market share 8 months 2023
Pepper	163.130	231.988	187.755	15,1	63,5
Cassia	49.519	77.996	61.852	24,9	20,9
Star Anise	8.060	12.855	9.996	24,0	3,4
Ginger, Turmeric	4.042*	10.849	26.029*	544,0*	8,8
Chili	3.916	4.904	8.295	111,8	2,8
Green, Black Cardamom	1.415*	5.589	1.623*	14,7*	0,5
<b>TOTAL</b>	<b>230.082</b>	<b>344.060</b>	<b>~ 295.550</b>	<b>~ 28,5</b>	

In the first 8 months of 2023, the total export volume of all Vietnamese spices reached approximately 295.550 tons, up 28,5% compared to the same period last year.

In 2022, the total export quantity of all spices reached 344.060 tons, of which pepper reached 231,988 tons, cassia reached 77,786 tons, star anise reached 12,855 tons, other spices such as chili, ginger, cardamom, clove reached 21,431 tons. Total export value of all spices reached 1.417 million \$US.

# EXPORT TO INDIA 8 MONTHS 2021 - 2022 - 2023



Type	8 months			% +/-	Export of Vietnam	2023			
	2021	2022	2023	23/22		% India	% China	% US	% EU
<b>Pepper</b>	10.280	10.821	8.246	-23,8	187.755	4,4	28,7	20,0	18,4
<b>Cassia</b>	20.390	20.352	27.280	34,0	61.852	44,1	2,8	19,0	8,0
<b>Star Anise</b>	3.703	3.924	5.720	45,8	9.996	57,2	14,5	9,5	10,0

*Unit: tons.*

# OPPORTUNITIES



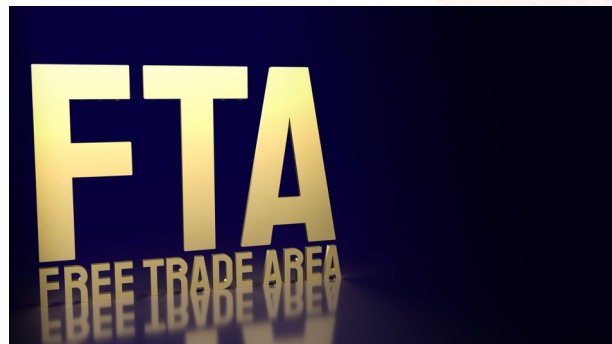
Diverse climates and soils create conditions for the development of different types of spice plants.



Vietnamese farmers are industrious, have a lot of experience in agricultural cultivation.

Many free trade agreements to create good conditions for Vietnamese enterprises to export products.

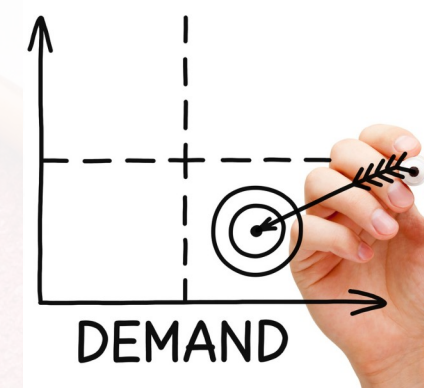
The elevation of the Viet Nam-U.S. bilateral relations to comprehensive strategic partnership following China, Russia, India, and South Korea.



The processing capacity can meet the needs of major importing countries.



Product quality has been improved thanks to support of sustainable programs from the government, the Ministry of Agriculture and other NGOs such as IDH, CRED, Sippo...

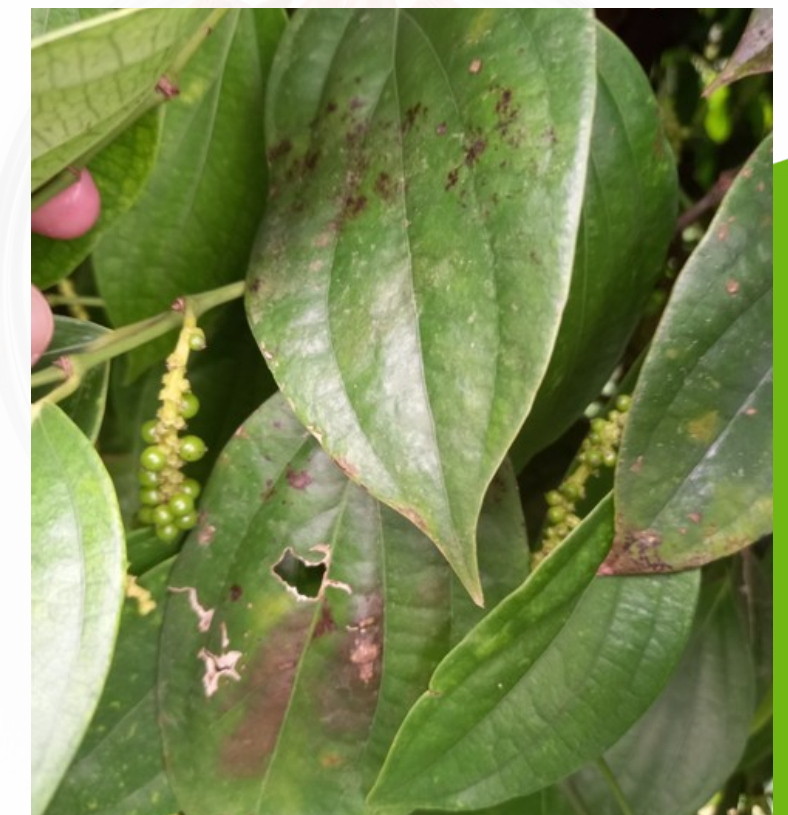


The demand for the spice industry in the market is still high, not only in the food sector but also in the pharmaceutical, cosmetic and functional food industries.

# CHALLENGES

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- Effects of climate change, El Nino, adverse impacts on soil, irrigation water ...
- Pests and Diseases.
- Competition in the market.
- Market requirements of importing countries (Europe and the U.S.).



# THE WAY FORWARD

- Viet Nam currently has 35 processing factories that meet ISO, HACCP, BRC, ESA, ASTA standards, etc. to create a variety of products to suit the needs and expand the market.
- Contract farming programs towards Sustainability, Biodiversity. Various Certification program such as organic, UEBT ... jointly done by exporters in partner with growers.
- Trade promotion activities.
- Collaboration and partnership.



Image: Processing Factory

**DIVERSIFICATION**



**SUSTAINABLE  
FARMING**

# VIET NAM INTERNATIONAL PEPPER OUTLOOK 2024



Viet Nam Pepper and Spice Association  
VIPO 2024 | Hanoi-Viet Nam  
8th- 10th March 2024



Block  
The Dates!

Announcing  
**VIPO 2024**

8th- 10th March 2024

Hanoi , Viet Nam

**THEME :**

**Sustainability  
Through  
Inclusivity**

Viet Nam Pepper and Spice Association  
135A Pasteur Str, Vo Thi Sau Ward, Dist. 3, HCMC, Vietnam  
Tel: (84-28) 3823.7288  
Fax: (84-28) 3822.3901  
Email: [info@vpsaspice.org](mailto:info@vpsaspice.org)  
Website: [www.vpsaspice.org](http://www.vpsaspice.org)

**We will be back soon  
with more details!**

## VIPO 2022 Vietnam Pepper Outlook 2022

About 300 Delegates





Sustainability  
through  
Diversity

# THANK YOU

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[info@vpsaspice.org](mailto:info@vpsaspice.org)



<http://vpsaspice.org/>

