

Vietnam Pesticide Association (VIPA)



Agriculture in Vietnam and Status of Pesticides Market

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Vietnam Pesticide Association



Agriculture in Vietnam: Current Status and Development Trend



NORTH WEST
RICE , FRUITS, CORN, TEA.

2015

Population (million) 91.6

GDP per capita (USD) 2,036

Economic Growth (GDP, annual variation in %) 6.7

MEKONG DELTA
RICE , FRUITS, CORN, SUGAR CANE

HIGH LAND
RICE , COFEE, FRUITS, CORN, PEPPER

NORTH EAST
RICE , FRUITS, CORN, TEA

RED RIVE DELTA
RICE , FRUITS, VEGETABLE

NORTH CENTRAL COAST
RICE , COFEE, FRUITS, CORN, RUBBER

SOUTH CENTRAL COAST
RICE , FRUITS, CORN, VEGETABLE

SOUTH EAST
RICE, CORN, VEGETABLE,
RUBBER, COFFEE, TEA, CITRUS,
MANGO, PEPPER, CASHEW.

Distribution of plants according to the geographical location of Vietnam



The role of Agriculture in Vietnam's economy:

In 2015, agriculture, forestry and fishery accounted for:

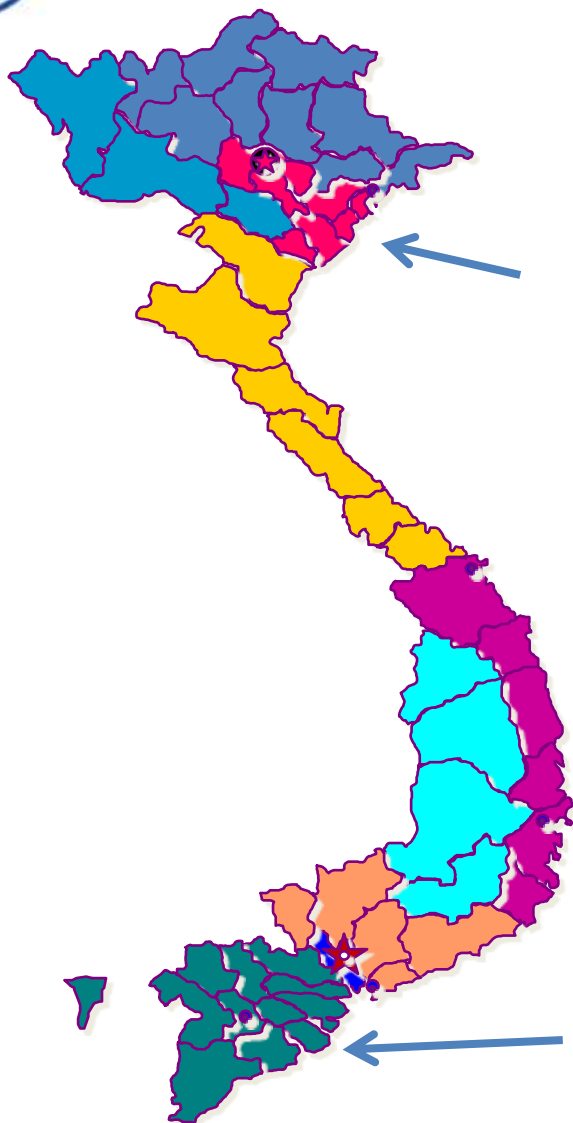
- only 18% percent of Vietnam's GDP.
- more than 45% labor force using in.
- over 67% of the population and nearly half of the workers who live in rural areas.
- In 2015, the value of agriculture is around 35.15 billion USD, and grow up an average of 3% per year.

In basically, Vietnam is an agricultural country.

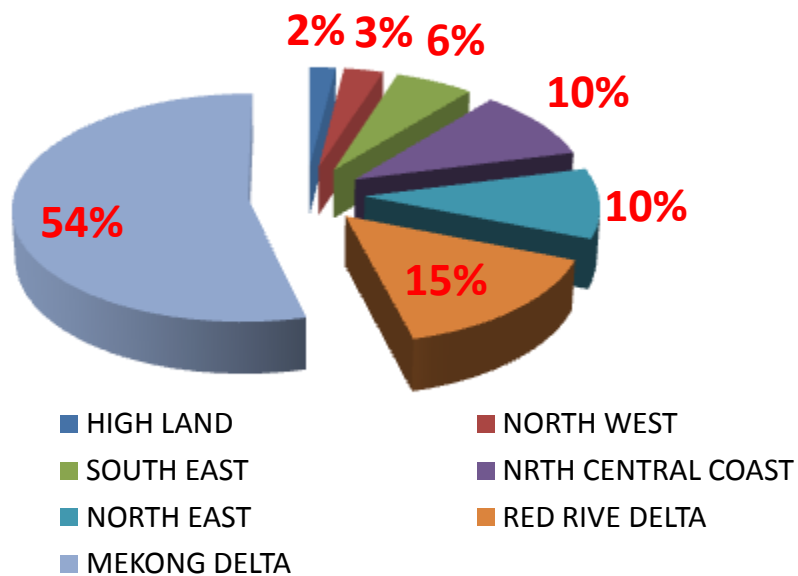


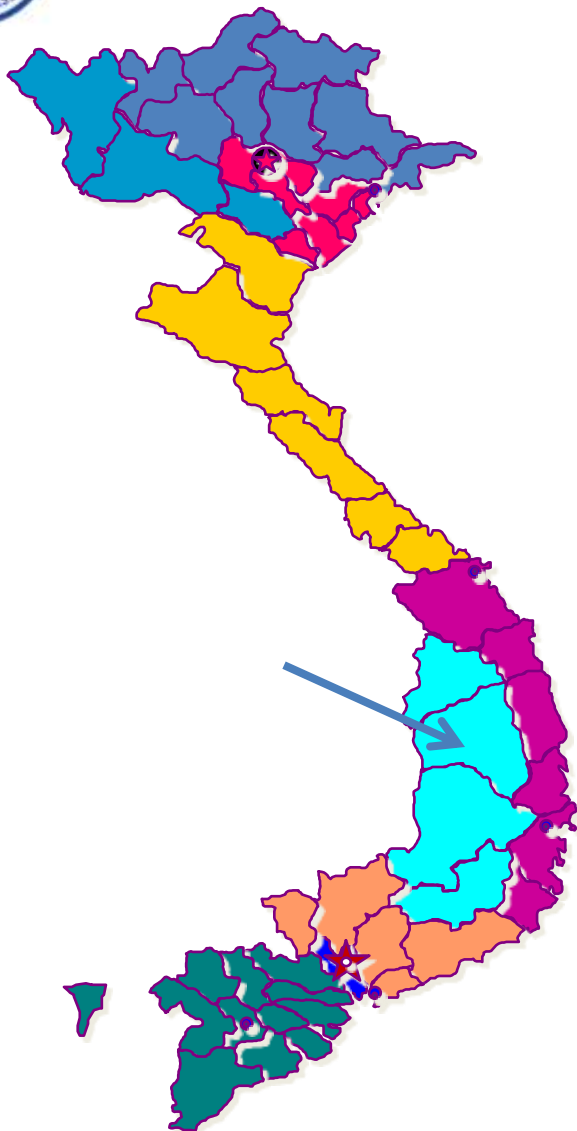
Area of agricultural land in 2015: 10 million hectares, including the main crops and corresponding area as below:

- Rice: 7 million hectares
- Rubber: 1 million hectares
- Corn: 1.17 million hectares
- Fruits: 800,000 hectares
- Coffee: 650,000 hectares
- Black pepper: 100,000 hectares
- Cashew: 100,000 hectares
- Others

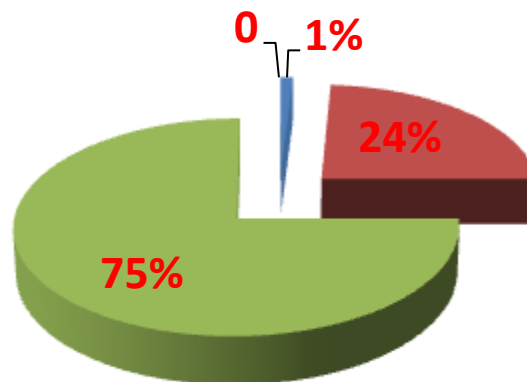


RICE AREA: 7.082.000 HA

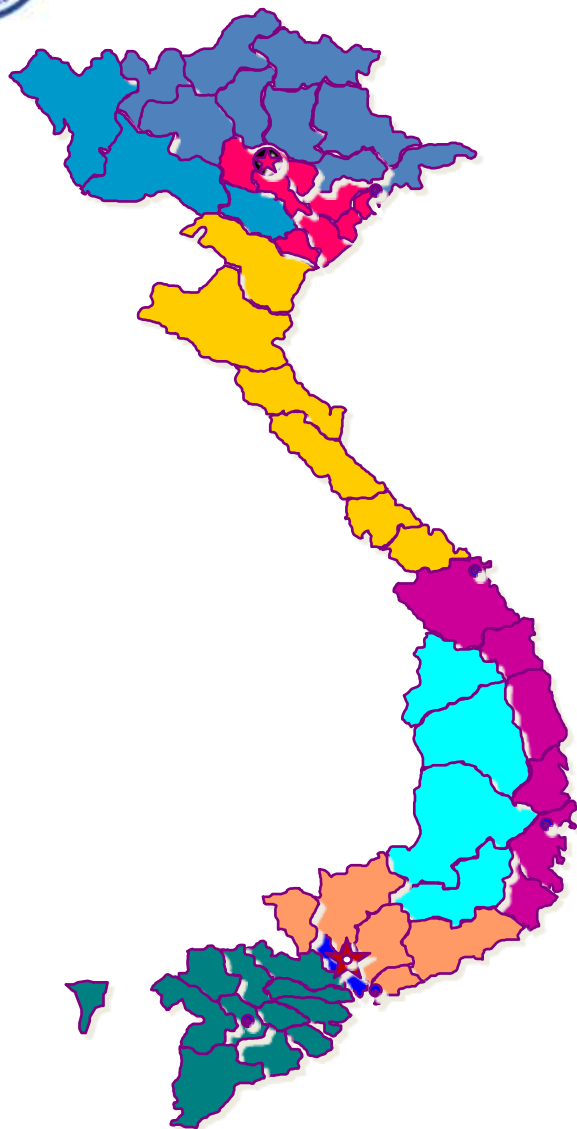




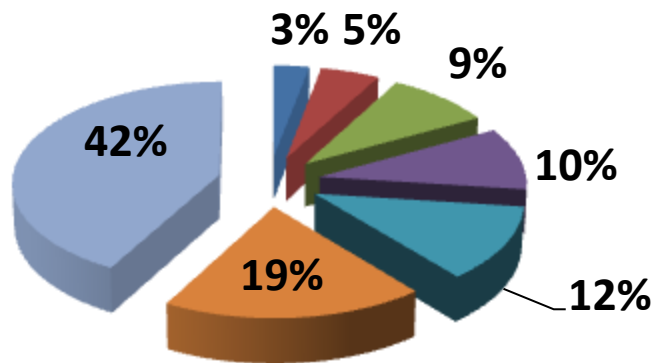
COFFEE AREA : 615.000HA



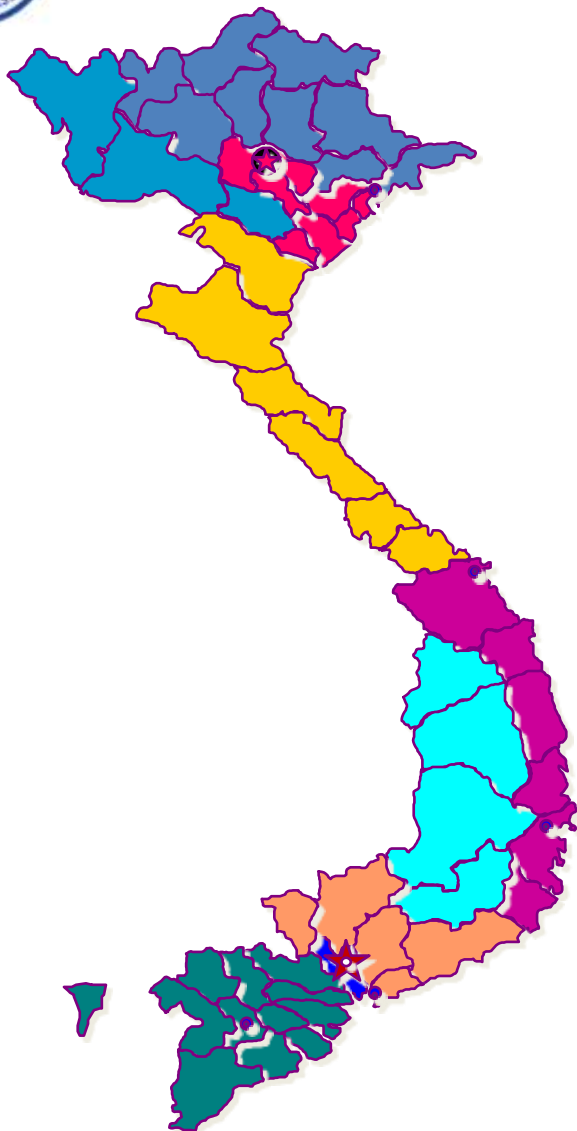
- NORTH CENTRAL COAST
- SOUTH EAST
- HIGH LAND



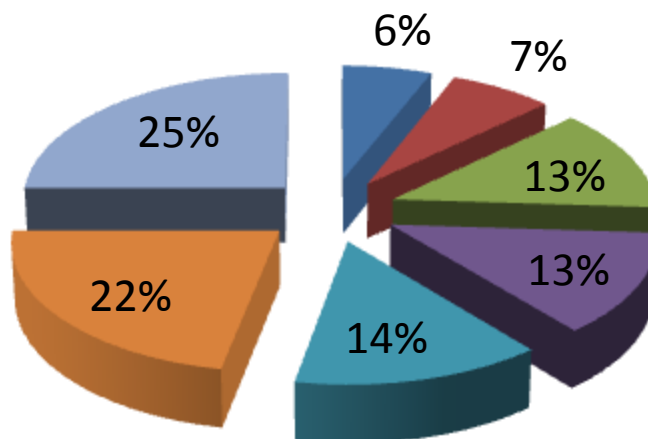
FRUITS AREA : 458.000 HA



- SOUTH EAST
- NORTH WEST
- NORTH CENTRAL COAST
- RED RIVE DELTA
- NORTH EAST
- HIGH LAND
- MEKONG DELTA



AREA CORN: 602.000 HA



- MEKONG DELTA
- NORTH WEST
- NORTH CENTRAL COAST
- RED RIVE DELTA
- NORTH EAST
- SOUTH EAST
- HIGH LAND



Main Pests:

- **Rice:** blast, leaf borers, stem borers, plan hoppers, weeds, Dirty Grain, Bacterial Blight
- **Coffee:** Rust, Anthracnose, Nematodes, Scale
- **Rubber:** powdery mildew disease, pink disease, panel black stripe, Corynespora disease.
- **Black pepper:** Phytophthora foot rot, slow decline, stunted disease, anthracnose, nematodes.
- **Dragon fruit:** brown spot disease.
- **Longan tree:** witches' broom disease.
- **Citrus:** greening disease, Phytophthora disease, Spider mite, Sucking pests

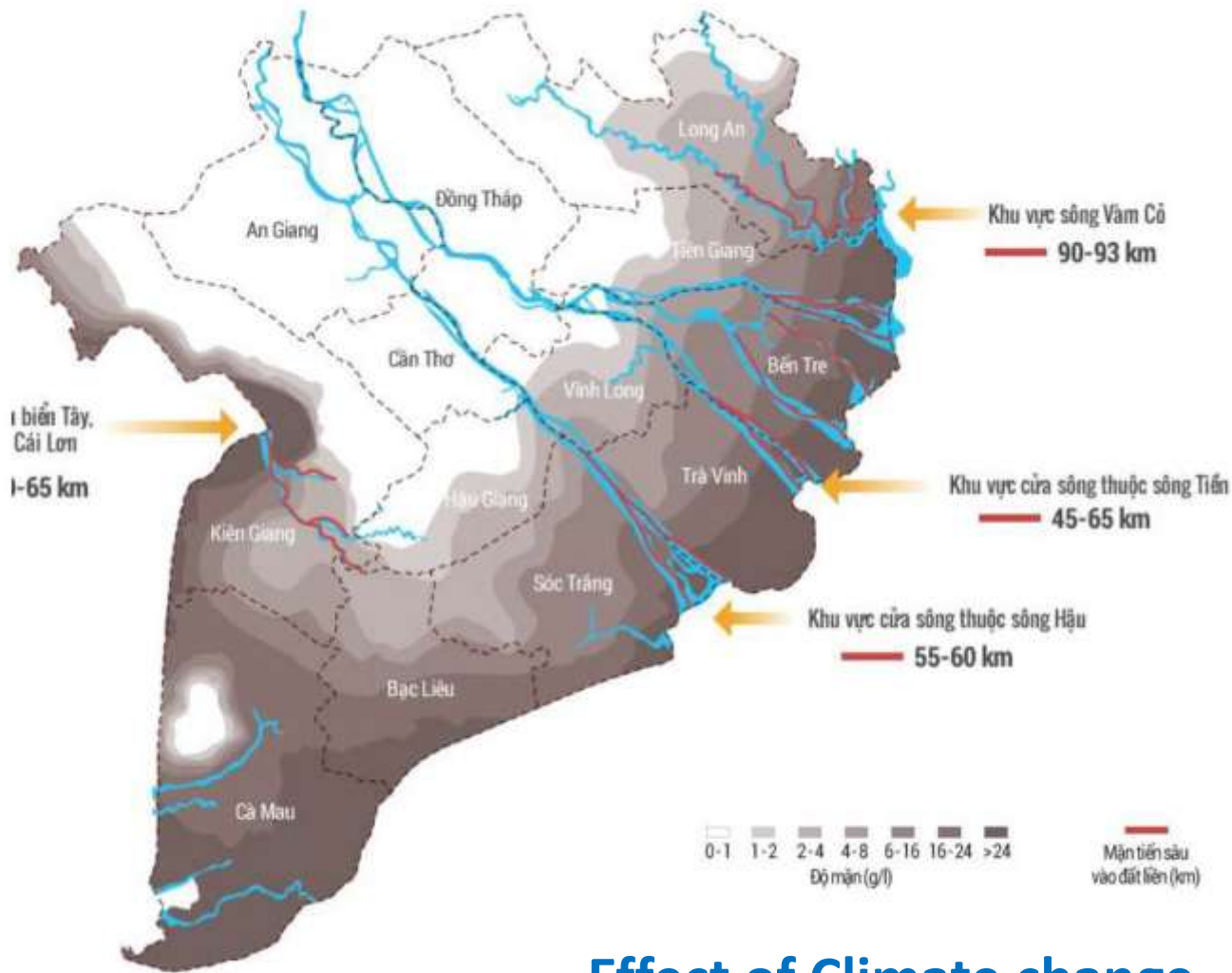


Challenge for agriculture in Vietnam

- Climate change: with typically symptom is drought in 2015 and the salination in early 2016.
- Food hygiene and safe is still the subject to be considered when using pesticides in agricultural production is not in compliance with the manufacturer's recommendations (overdose, incorrect object, ...)
- Lack of planning leads to instability because farmers continuously converted to higher value crops.



Drought and saltwater attack Mekong Delta



Effect of Climate change



Agricultural development strategy until 2020

- Develop in effective way by sustainable comparative advantage, increase productivity and added value, improve quality, ensure food safety and hygiene products, protect environment and food security, meet the needs of the growing population
- Maintain an average annual growth rate is 2.5-3% / year
- Focus on developing: rice, coffee, rubber, cashew, pepper, tea, fruits, ...)
- Minimize disadvantages of plant, accept to import with reasonable scale



Agricultural development strategy until 2020 (cont.)

- Developing the production of Vietnam Rice become a key export commodity efficiently and ensure food security
- Supplying monitoring system and regulatory policies to maintain output in a suitable proportion scope of domestic and foreign markets.
- Ensuring in 2020:
 - ✓ Rice to reach 41 million tons
 - ✓ Coffee : 1.1 million tons
 - ✓ Rubber latex: 1.5 million tons
 - ✓ Pepper: 120 thousand tons
 - ✓ Cashew: 600 thousand tons
 - ✓ Fresh tea buds: 1 million tons
 - ✓ Fruit trees: 12 million tons



Registration procedure Note:

Must comply with Circular pesticide product administration - No. 21/2015/TT-BNNPTNT:

General principles of pesticide product registration (the article 5.)

- The authorized organization or individual as mentioned above shall be allowed to act on behalf of only one manufacturer of active ingredients, technical pesticides or Formulated pesticide products to apply for the registration of specific active ingredients, technical pesticides or formulated pesticide products.



Registration certificate holder:

- Be entitled to register 01 commercial name for each active ingredient, technical pesticide or Formulated pesticide product used for deterring or killing harmful organisms or regulating the growth of plants. If these active ingredients, technical pesticides or Formulated pesticide products are used to disinfect warehouses or storage facilities, store plants, kill termites causing damage to buildings, dykes or embankments, or treat seeds, they are subject to another commercial name registration;
- Only register 01 specified content of active ingredient used for each formulation of a pesticide product.



Pesticide products banned for registration in Vietnam (Article 6.)

1. Pesticide products specified in the List of pesticide products banned for use in Vietnam (hereinafter referred to as the banned list).
2. Formulate pesticide products or pesticide active ingredients with acute toxicity class-I or class-II as classified in the globally harmonized system of classification and labeling of chemicals (hereinafter referred to as GHS),...
3. Methyl bromide pesticides.
4. Pesticide products registered to exert such effects as controlling organisms other than the ones harmful to plants in Vietnam.
5. Pesticide products invented but not yet licensed in overseas countries.

...



- A pesticide is circulated in Vietnam:
 - ✓ must to perform registration (by the Ministry of Agriculture and Rural Development)
 - ✓ recognize in the list of pesticides permitted for use in Vietnam
 - ✓ at least 2 years
 - ✓ 10 -18 thousand USD



Registration situation

- 319 companies operating in production and trade pesticides.
- 1,643 A.I with 3,902 trade names in list of pesticides permitted for use in Vietnam



No.	Kind of Pesticide	Number of A.I	Number of Product name
01	INSECTICIDES	700	3.705
02	FUNGICIDES	581	1.238
03	HERBICIDES	232	681
04	RODENTICIDES	11	27
05	GROWTH REGULATORS	45	136
06	MOLUSCIDES	25	140
07	OTHERS	58	77

Source: Vipesco s' marketing department

Table. 1: Registration situation in Vietnam (2016)



Agricultural chemical consumption situation in VN

Domestic consumption situation from 2013-9/2016

Year	USD
2013	1,306,168,637
2014	1,288,164,339
2015	1,236,178,308
9T/ 2016	857,041,789

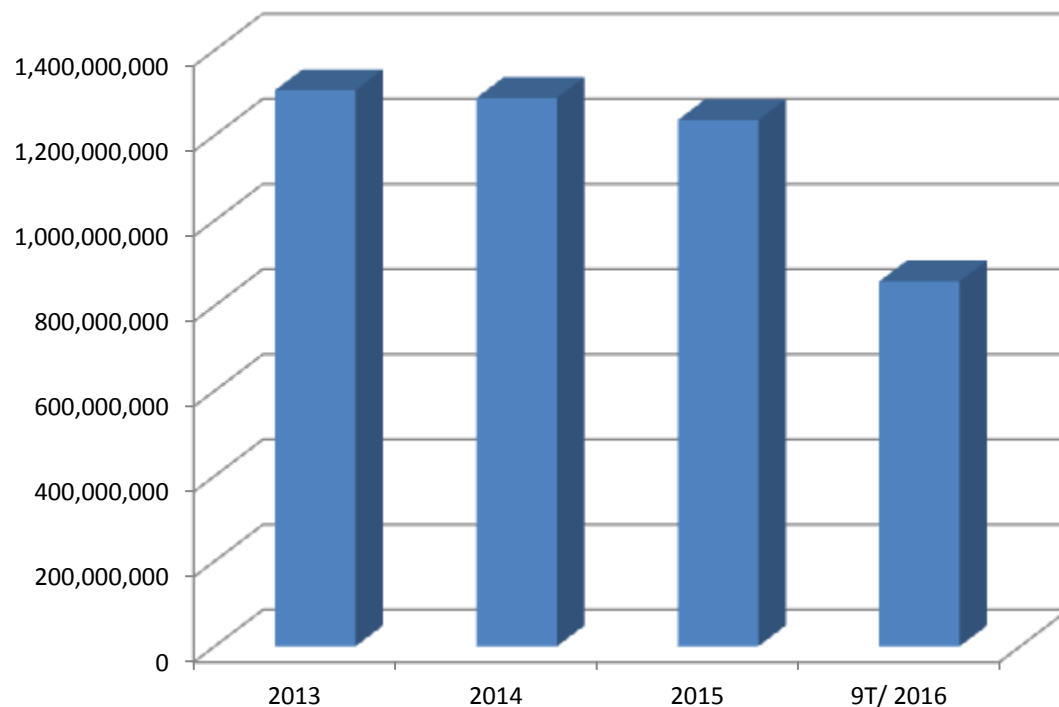
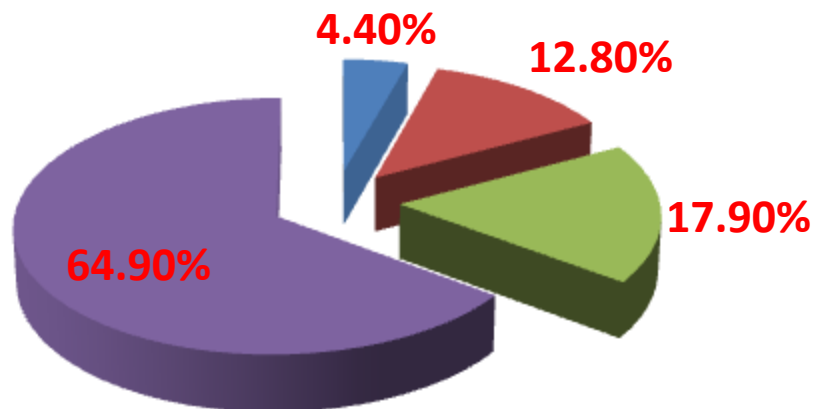


Table 2 and Figure 1: Estimated the total value of domestic consumption in recent years

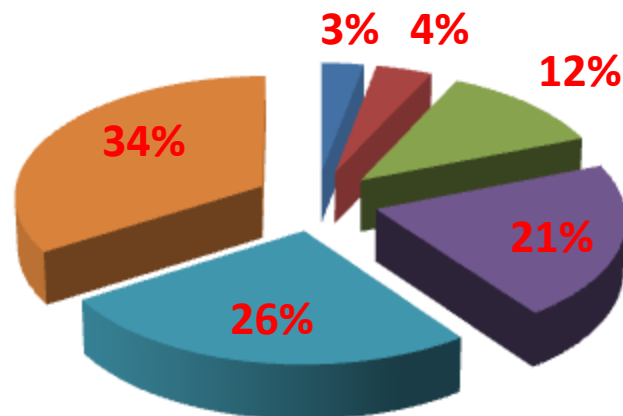


Pesticide Consumption Using in 2015:

1,23 billion USD



- ORTHERS PLANT
- VEGETABLE
- INDUSTRIAL CROPS
- RICE CROPS



- FUMIGATION
- ORTHERS
- FETILEZERS LEAF
- HERBICIDE
- PESTICIDE
- FUNJICIDE



Imported Pesticides Situation

Vietnam imported:

- **over 50 countries and regions.**
- **both technique and formulation products**
- **mainly from China, more than 50% per year, equivalent to around \$ 300 millions per year.**
- **from India, Germany, Korea, Japan.**
- **from Thailand is top 8**



Vietnam Pesticide Association

No.	Origin	Year (millions USD)			
		2013	2014	2015	9M/ 2016
1	Grand Total	698.42	691.19	566.00	536.48
2	China	364.23	374.48	292.18	265.16
3	Singapore	59.57	43.90	41.33	36.93
4	India	35.22	37.07	40.15	37.57
5	Germany	40.89	41.21	32.00	40.51
6	Korea	23.58	33.44	31.90	25.50
7	Japan	27.97	29.14	27.92	29.30
8	Thailand	30.06	33.73	22.43	20.61
9	Malaysia	7.50	9.03	14.31	12.85
10	Indonesia	12.59	22.62	13.82	16.50
11	France	19.22	9.67	11.60	18.94
12	Taiwan	2.51	3.63	6.87	5.58
13	USA	9.97	9.95	5.86	4.16
14	UK	37.88	13.09	5.29	4.23
15	Colombia	6.96	7.52	3.19	1.49
16	Bulgaria	2.73	2.57	2.82	3.10
17	Switzerland	3.94	3.97	2.71	1.53
18	Liechtenstein	0.00	3.57	2.50	3.69
19	Israel	6.30	4.41	2.16	1.01
20	Belgium	3.60	1.45	1.58	0.88



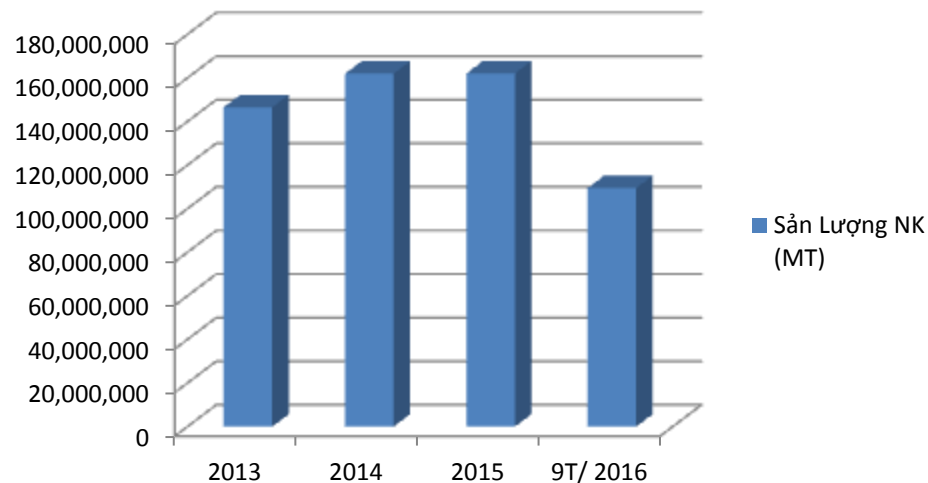
According to volume and value:

- **The imported Pesticide situation is stable around 160 million tons / year, equivalent to 825-860 millions USD**
- **The imported in the first 9 months of 2016 is equivalent to 67-70% both the total value and volume of in 2015**

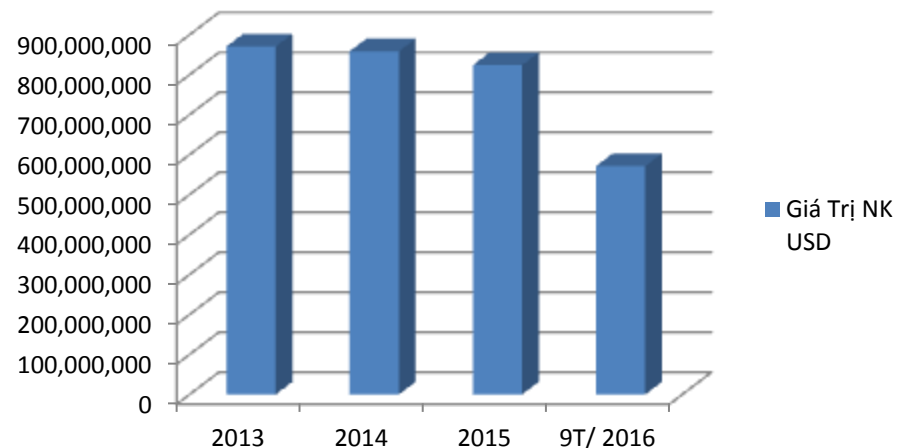


Năm	IMPORT VOLUME (MT)	IMPORT VALUE(USD)
2013	116,582,162	870,779,091
2014	161,982,929	858,776,226
2015	162,061,387	824,118,872
9T/ 2016	109,473,678	571,361,192

VOLUME (MT)



VALUE USD



IMPORT SITUATION



According to volume and value of A.I

In 2015, Imported:

- ✓ 162 million tons , 824 million USD.**
- ✓ majority both in volume and value:**
 - herbicides: Glyphosate, Paraquat, 2.4D products and**
 - pesticides: Dimethoate + Fenobucarb, ethyl Chlorpyrifos, Diazinon**
- ✓ Fungicides as Tricyclazole although of standing at the 17th in volume but the import value stood at the 2nd with \$ 31 million.**



Top the most 30 A.I in Value in 2015

No.	A.I	Total (m. USD)
	Grand Total	824.12
1	Glyphosate	65.68
2	Tricyclazole	31.69
3	Difenoconazole 150 g/l + Propiconazole 150 g/l	30.87
4	Paraquat	28.77
5	Azoxystrobin 200g/l + Difenoconazole 125g/l	28.40
6	Chlorpyrifos Ethyl	25.98
7	Propiconazole 125 g/l + Tricyclazole 400g/l	25.57
8	Hexaconazole	24.07
9	Emamectin benzoate	20.27
10	Abamectin	17.45
11	Tebuconazole 500g/kg + Trifloxystrobin 250 g/kg	16.99
12	Mancozeb	13.62
13	Pretilachlor 300 g/l + Fenclorim 100 g/l	13.56
14	Fipronil	13.18
15	chlorantraniliprole	12.97

No.	A.I	Total (m. USD)
16	Butachlor	12.56
17	Indoxacarb	10.10
18	Permethrin	9.93
19	2.4 D	9.77
20	Chlorantraniliprole 20% +Thiamethoxam 20%	9.54
21	Metalaxyl M 40 g/kg + Mancozeb 640 g/kg	9.35
22	Flubendiamide	9.27
23	Propineb	8.61
24	Bispyribac-Sodium	8.53
25	Diazinon	8.46
26	Azoxystrobin	8.20
27	Kasugamycin	8.07
28	Carbendazim	7.91
29	Difenoconazole	7.37
30	Carbosulfan	7.30



Top the most of 30 A.I in Volume in 2015

No.	A.I	Volume (m.T)
	Grand Total	162.06
1	Glyphosate	28.49
2	Dimethoate 3 % + Fenobucarb 2 %	13.92
3	Paraquat	11.08
4	Chlorpyrifos Ethyl	10.20
5	Diazinon	6.09
6	Hexaconazole	5.35
7	2.4 D	3.66
8	Carbosulfan	3.46
9	Abamectin	3.41
10	Mancozeb	3.08
11	Butachlor	2.94
12	Cypermethrin	2.65
13	Validamycin (Validamycin A)	2.52
14	Permethrin	2.51

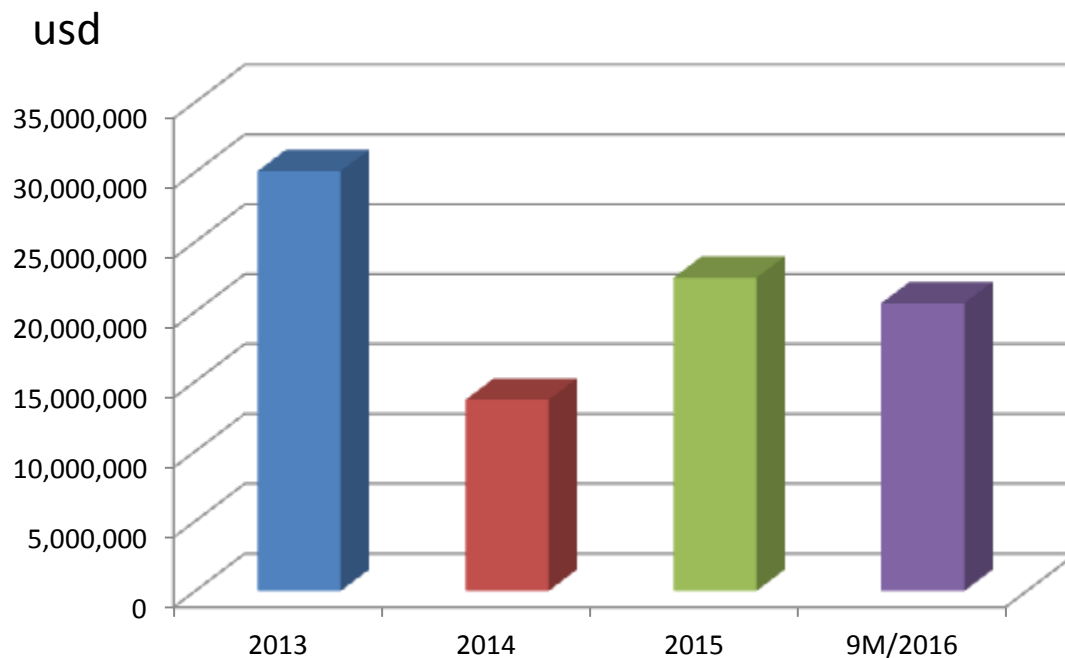
No.	A.I	Volume (m.T)
15	Pretilachlor 300 g/l + Fenclorim 100 g/l	2.29
16	Emamectin benzoate	2.02
17	Tricyclazole	1.89
18	Nereistoxin (Dimehypo)	1.77
19	Propiconazole 125 g/l + Tricyclazole 400g/l	1.71
20	Carbendazim	1.65
21	Alpha Cypermethrin	1.63
22	Propineb	1.55
23	Isoprothiolane	1.52
24	Acetochlor	1.40
25	Difenoconazole 150 g/l + Propiconazole 150 g/l	1.36
26	Imidacloprid	1.16
27	Butachlor 27.5% + Propanil 27.5%	1.15
28	Fipronil	1.03



IMPORT FORM THAILAND

Year	2013	2014	2015	9M/2016
IM -Value (USD)	30.06	13.69	22.43	20.61

3-4%
with 20-30
million USD/Year





- **Thanks for your attention!**





Vietnam Pesticide Association

For more information, please contact Ms. Ha

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