

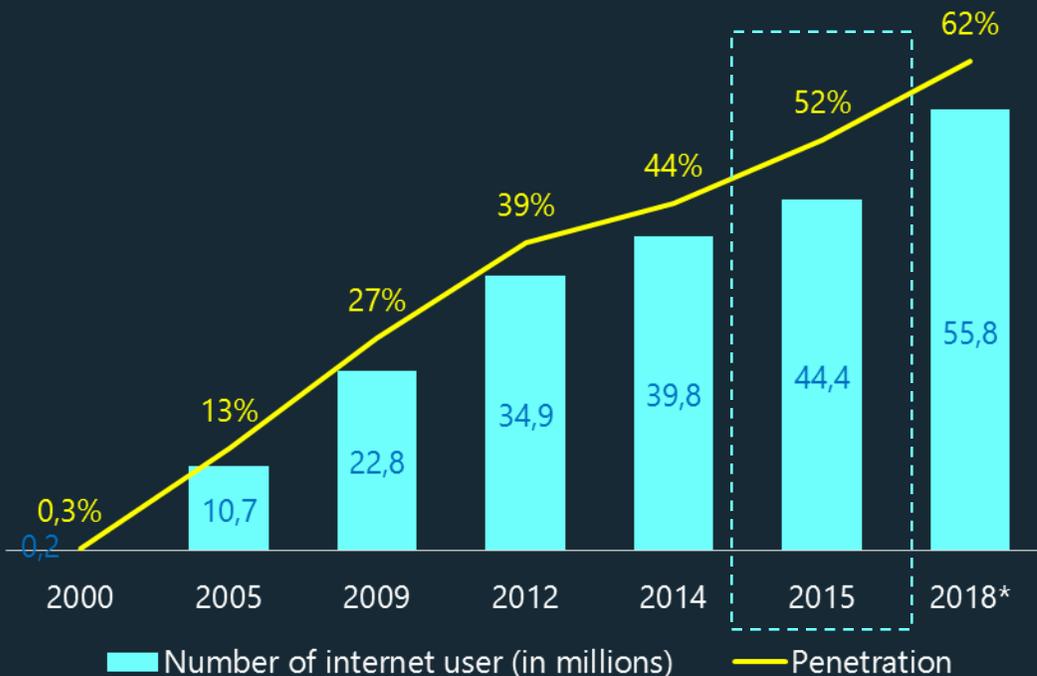


**TOP 10 REMARKABLE
TRENDS OF
VIETNAMESE
CONSUMERS RECENTLY**



**Booming Internet & Smartphone
Penetration Drives Consumer Habit**

One out of three Vietnamese, or 36 percent of the population of 90 millions, now own a smartphone



*forecast

Know more

Share more

More demand

Source: Statista 2016



**Explosion of Modern Trade,
But Vietnam remains a Traditional
Trade Retailing Country**



Explosion Of Modern Trade, But Vietnam Maintains A Traditional Trade Retailing Country

Traditional Trade

~ 1.3 millions stores

Modern Trade

465 cvs
1,452 minimarts
~ 100 supermarkets

Number of MT has been triple in past 3 years

In home FMCG sales share

*forecast

2015

82

18

2020*

76

24



12 stores



4 stores



24 stores



24 stores



10 stores



65 stores



129 stores



130 stores



200 stores



**Mobile Booking starts to grow
at an exponential rate**

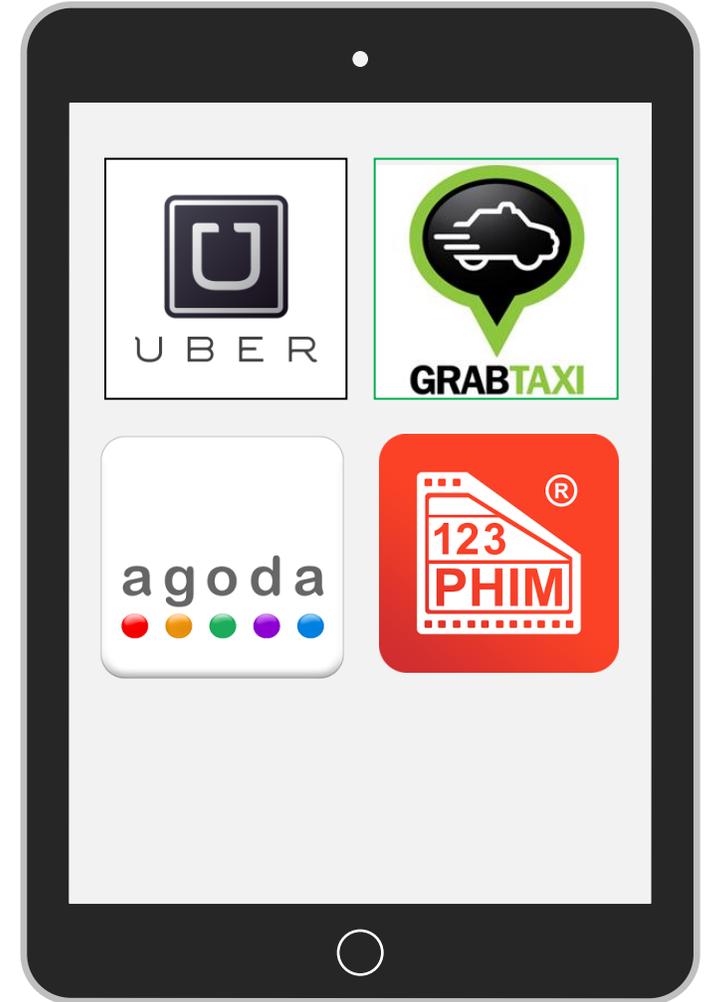


13 YRS: 5803 CARS

3 YRS: ~3000 CARS

A new booking for every 5s

**Vietnam is the fastest
growth market of Uber**





**Vietnamese Flock to
Online Shopping**

Vietnamese Flock To Online Shopping



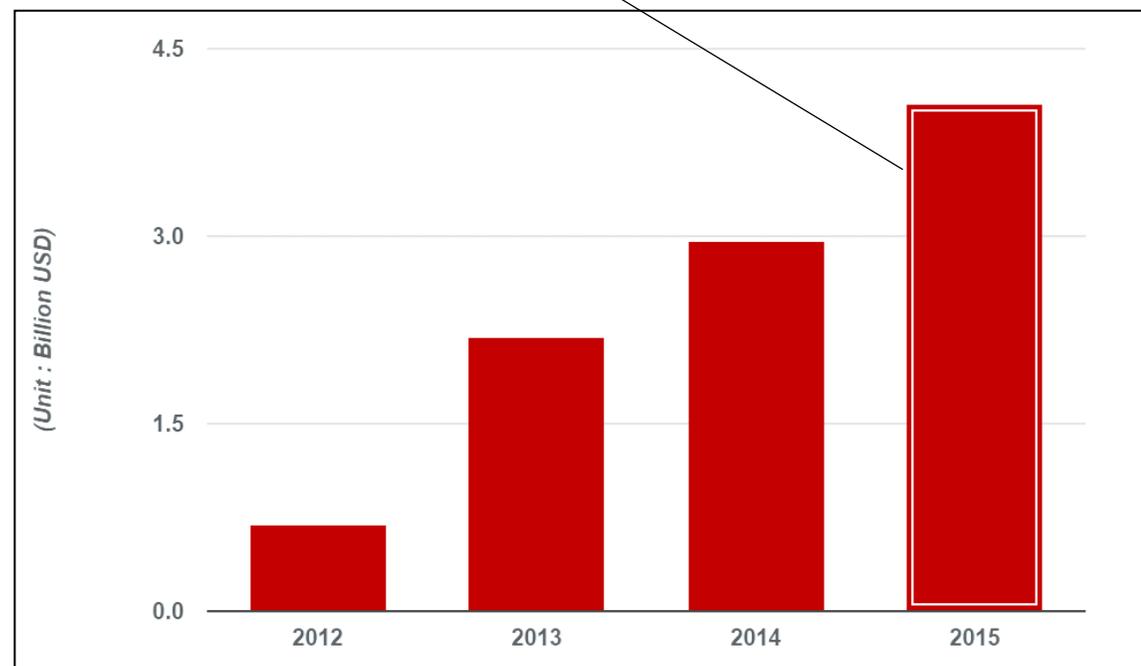
= **0,2%** of Domestic gross retail sales of goods and services

\$4.07 billion

(spend for online shopping in 2015)

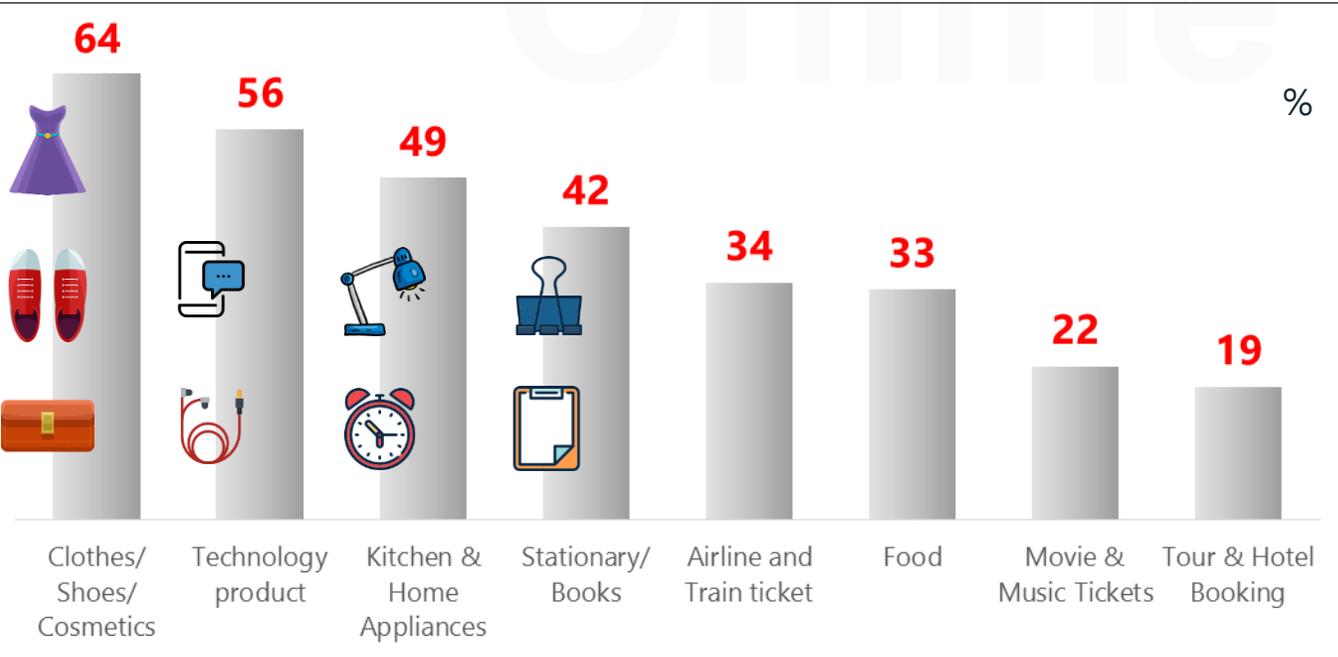
increase 37%

(from 2014)

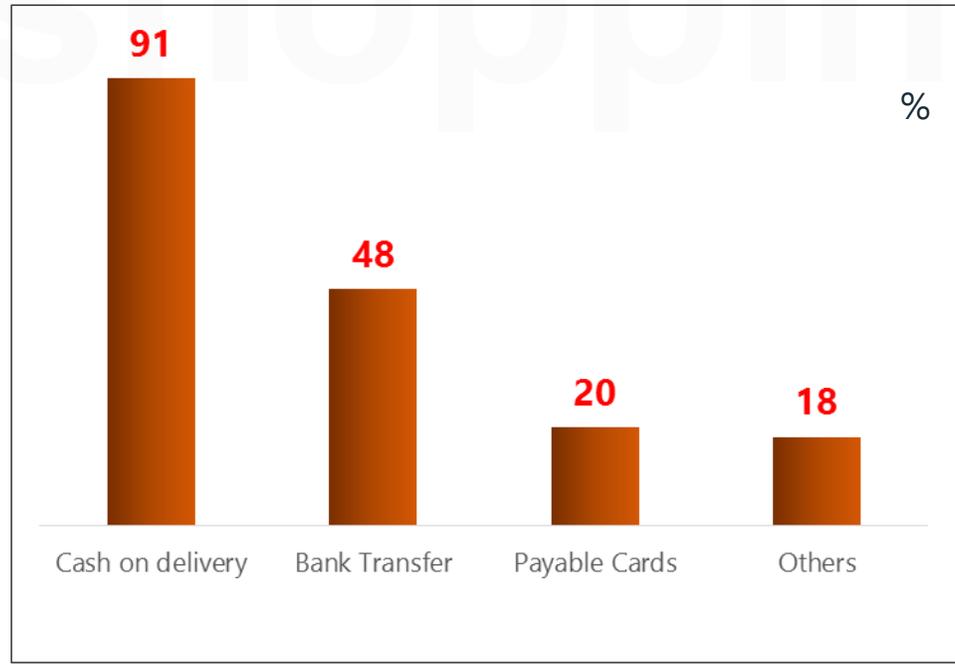


Vietnam B2C E-Commerce Total Revenue, 2015

Online shopping



Online shopping category in 2015



Online shopping payment



**More Effort & Investment To
Conquer Health Consciousness**

More Effort & Investment To Conquer Health Consciousness

2006

10
YRS

2016



2006 – 0 Degree Green Tea
(reduce stress, fatigue and increase resistance to illness)



2009 – Dr Thanh Herbal Tea
(help purify the body and rid the system of toxins)



HEALTHY FOOD IS

- 94% SAFE/ HYGIENIC
- 91% FRESH
- 72% NATURAL
- 67% VITAMINS INCLUDED
- 58% FROM TRUSTWORTHY MANUFACTURERS
- 58% NO ARTIFICIAL ADDITIVES



HEALTHY PRODUCT ARE

- 90% LIQUID MILK
- 73% LOW CHOLESTEROL OIL
- 63% ORGANIC FOOD
- 56% POWDER MILK
- 54% YOGURT
- 46% CEREAL
- 34% CHEESE

Source: Nielsen report: Know.Act.Grow 2014

action

**More
action to
conquer
health
consciousness**

Select Reliable Distributors

Aggressive expansion of Health and Beauty Retail chain

- **Guardian:** 43 stores (5 years)
- **Medicare:** 42 stores (10 years)
- **GNC:** 11 stores

Readily paying for Health Club membership

Booming of many Health & Fitness Club

- **California Fitness & Yoga:** 23 outlet (8 yrs.)
- **Elite:** 8 outlets (6 yrs.)
- **Starfitness:** 2 outlets

Seeking/ Priority for Natural/ Organic



**Cultivate CLEAN
VEGETABLE
themselves**



**Booming of
CLEAN
VEGETABLE Store**



**Hunting for
NUTRITIONAL
INFORMATION**



6

Go Green, Go Natural

Back to Organic

Many
products
with
signaling of
GREEN
NATURAL
ORGANIC



Vfresh Juice
100% natural



TH Milk
Truly natural



Nam Ngu Fish sauce
Clean Fish Sauce



Omachi instant noodle
Made from Potato



Kotex Panty Liner
Green Tea extraction



Organic vegetable

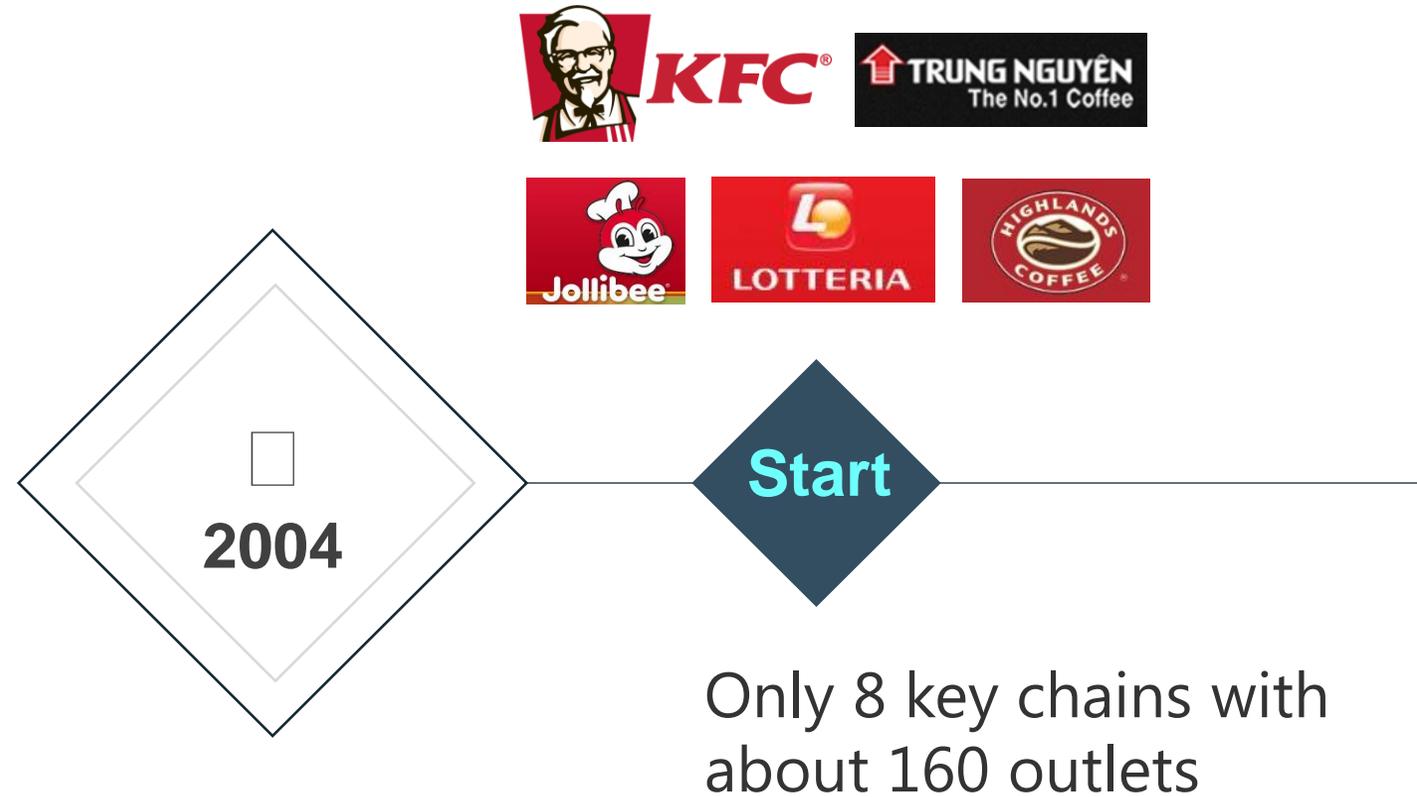


**F&B service
chain Grow**

timeline

F&B service chain Grow

F&B is even **one of the three leading business fields** in terms of growth rate and foreign investment attraction





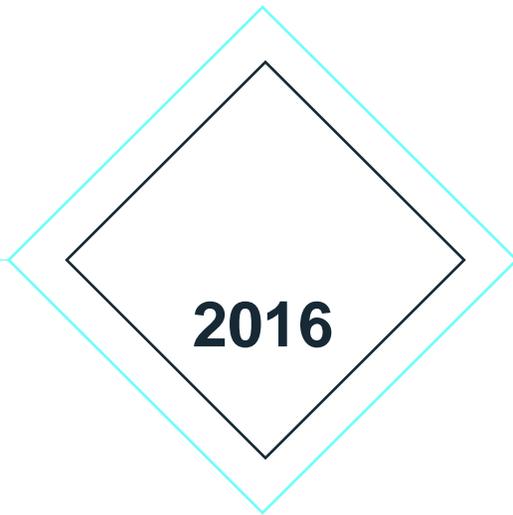
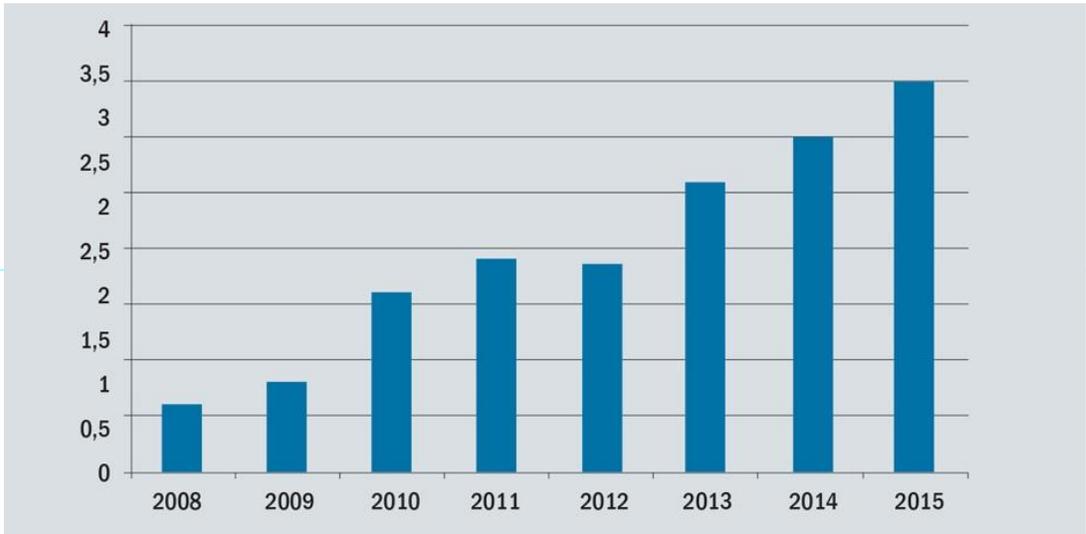
2013

Food

Fast Food

Drink

More than 100 key chains with average 30 outlets/ chain.



Number of customers go to Food Chain Restaurant of Golden Gate Company* (million people)



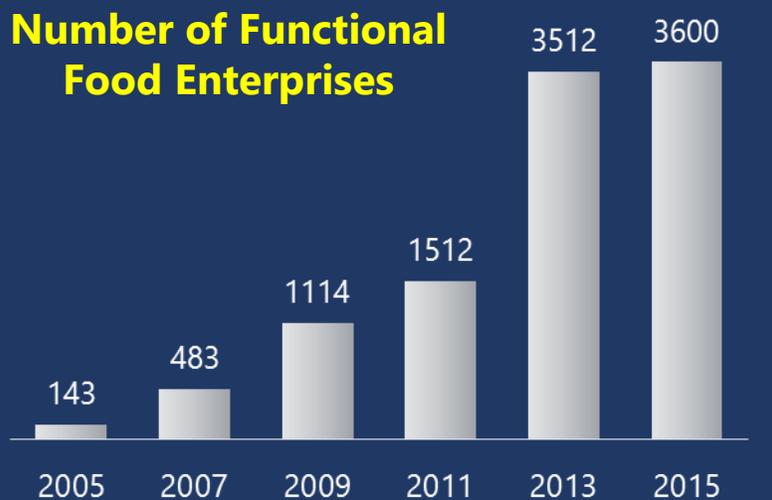
**Functional Food is Becoming
Daily Food to Vietnamese**

52/100

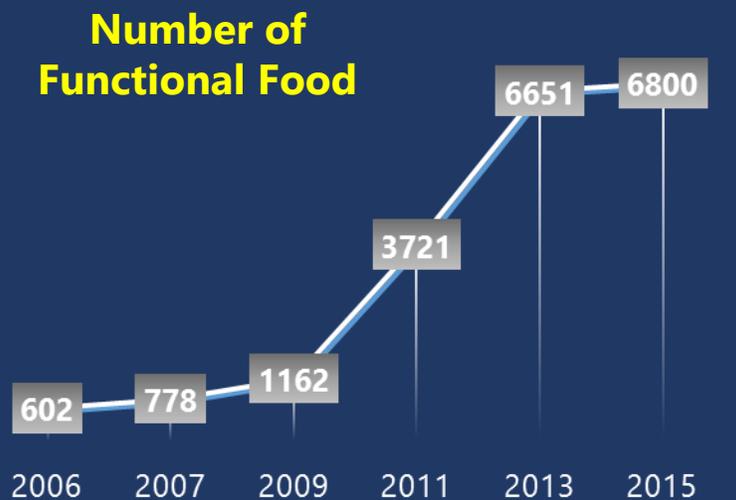
Vietnamese urban uses functional food



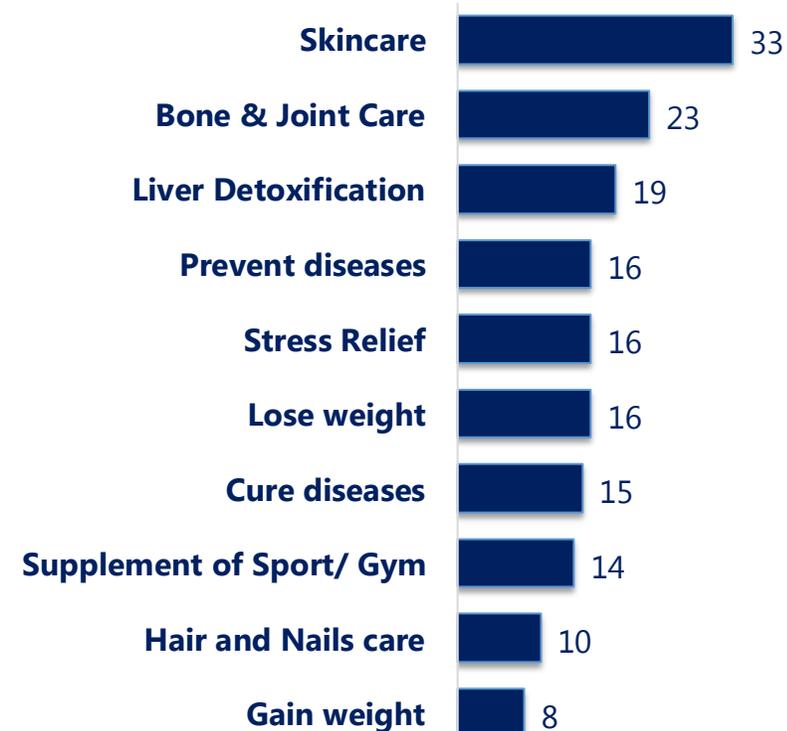
Number of Functional Food Enterprises



Number of Functional Food



Top consumed of Functional Food





Self-Expression and Publishing

Me, Myself and I

YouTube



mienguyen

1 ngày





Vietnam Rural is growing up steadily

Rural = 70% Vietnam population



HIGHER INCOME

44% income per capital
Growth
(2012 vs. 2010)



BETTER EDUCATION

2.5 times more college
graduates
(2014 vs. 2009)



FUTURE POSITIVE

High purchase intention for
durable electronic assets

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1. Booming Internet & Smartphone Penetration Drives Consumer Habit

2. Explosion of Modern Trade, But Vietnam remains a Traditional Trade Retailing Country

3. Mobile Booking starts to grow at an exponential rate

4. Vietnamese Flock to Online Shopping

5. More Effort & Investment To Conquer Health Consciousness

6. Go Green, Go Natural Back to Organic

7. F&B service chain Grow

8. Functional Food is Becoming Daily Food to Vietnamese

9. Self-Expression and Publishing

10. Vietnam Rural is growing up steadily

Golden Rules to Win Vietnam market





VIETNAMESE ARE
WILLING TO PAY
FOR **VALUE**

VIETSUMER

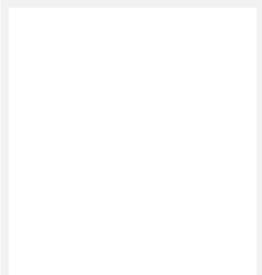
VIETSUMER

-
- Clean & Safe Food & Product
 - Convenience Service solution
 - Health & Beauty caring
 - Tailor-made product, showing personality product is preferred



NOT GROW UP,
VIETNAM IS
GROWING UP

VIETSUMER

- Want to catch up with the world for every new trends
 - Willing for the new things
 - To be a “global consumer”
- 



VIETSUMER

VIETSUMER

URBAN IS ATTRACTIVE,
YET DON'T FORGET TO

KEEP EYE ON RURAL

Vietnam rural is a new potential and niche market with less competition. A strong distribution is an advantage to win this market

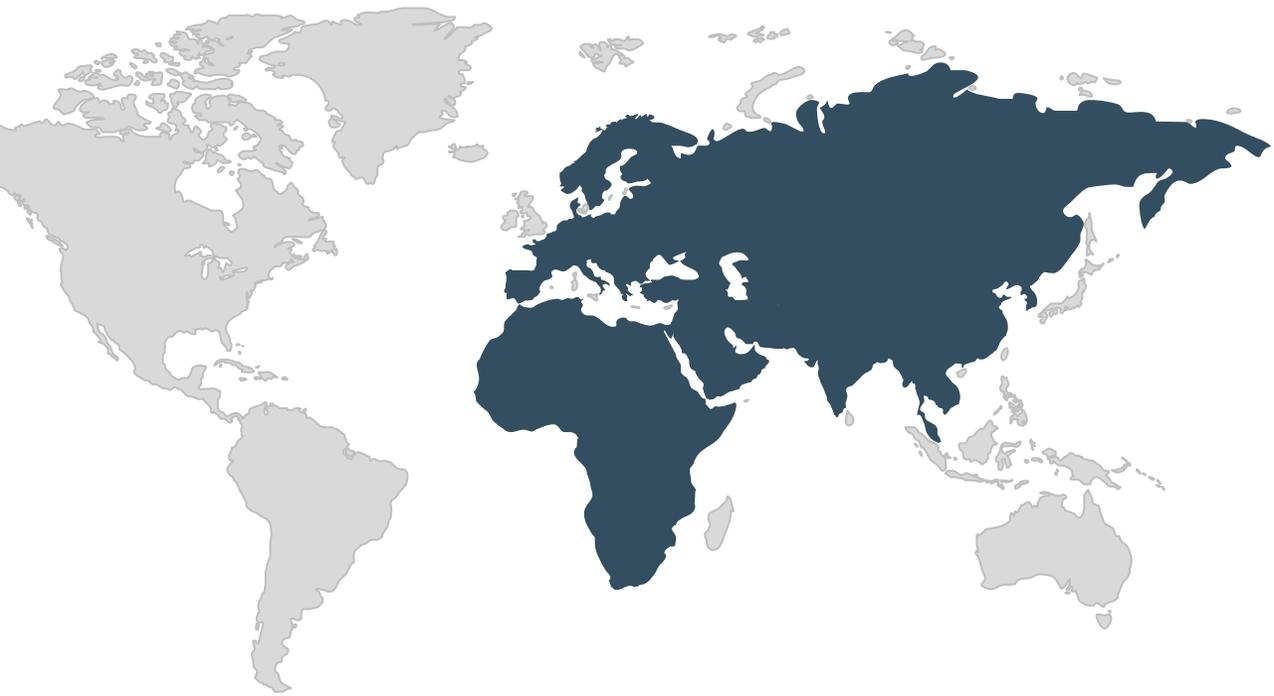


WE ARE ACTIVE
HIGHTECH ADAPTER,
BUT **T**RADITIONAL
THINGS
STILL DOMINANTE

VIETSUMER

VIE**T**SUMER

-
- Family focus
 - Respect of elder
 - Shopping in familiar grocery store
 - National pride
 - Television is still the trusted voice



VALUE HUNTING
GROW**I**NG UP
KEEP **E**YE ON RURAL
TRADITIONAL THINGS



INTAGE VIETNAM LLC.

www.intage.com.vn/