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2013 VIETNAM RETAIL - Market, Structure, SWOT, Investment, Entry Strategies, Operations, and Key Players

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Abstracts

Despite the fact that the Vietnam’s economy has a slow growth within the past two years, the retail market keeps attracting global and regional players. In addition to Big C and Metro C&C who have been years in Vietnam, there are several others who have tried to strengthen their presence or attempted to penetrate the modern trade sector which is only account for 20% of the whole market at this point in time. Different operators from various segments: shopping malls, grocery retailers and supermarkets, and convenient stores have been working hard to gain new market share. Existing operators such as Parkson, Lotte Mart, Family Mart, and Circle K are competing with newcomers such as Aeon, E-Mart, NTUC Fairprice, and Giant.

We are going to examine many aspects of Vietnam’s Retail Industry. Normally, a retail sector would go through several phases of development: small grocery stores, wet and flea markets, supermarkets, hypermarkets, shopping malls, department stores, convenient stores, E-Commerce, and m-commerce. This would be the case of retail sectors in many economies. However, for Vietnam, one can find most, if not all, physical presents of retail sector at a time, growing together and surviving the competition. In Ho Chi Minh City, one can go to buy a cigarette box at a small grocery store in Tran Hung Dao Street and drives his wife to pick up a perfume at a Vincom mall when she just needs to cross out one or two blocks to meet her friends busy shopping for clothing at a department store in Dong Khoi Street. His maid might go to a nearby supermarket Co.op for some foods while his son steps into a convenient store Family Mart for an ice cream or snack. He could eventually order some stuffs via local E-commerce website chodientu.vn and purchase something else using his mobile phone to pay via an application MobiVi. Vietnam does not move step by step in retail development path. Instead, one could see Vietnam’s retail’s progress impressive and chaotic.

Vietnam was ranked as one of the top emerging markets for retail in 2008-2009 but since then its rankings have continued to fall as the Vietnamese economy has not performed as well and stably as others. There are several reasons for that pull-back but it cannot be denied that the potential is great and is still there. Increasing demand of consumer goods and rising disposable incomes will be driving potential growth in a 90-million-population economy. Also, rising urbanization and expanding rural retail area promoted by improved infrastructure will be facilitating such growth. Within the past few years, market players have been increasing their presence in Vietnam. The number of modern stores, supermarkets, and shopping malls has increased tremendously. So has the number of foreign brands been penetrating into the market. Market volume is estimated at US$ 123.8 billion by end of 2013.

Numbers never tell lies. We are confident that with processed data collected from reliable trade sources, interviews with decision makers in the field, and our own observations and analyzed insights, readers can use our findings in several ways such as the followings:

A strategic industry review and analysis that covers historical development and relevant foundation, industry structure, overall industry strategies, and major considerations for investments and businesses;

A helpful reference manual of the Vietnamese retail sector that indentifies challenges and strategies for entering the market, that points out areas for continuous improvement, that forecasts development and market trends, and that reports where market opportunities exist.

A deep report of metrics of several major retailers, both local and international brands such as Saigon Coop, Big C, and Metro Cash & Carry;

A management case study for any stakeholders in the retail sector;

This comprehensive dataset includes a full suite of up to more than 50 figures and tables containing about 600 key metrics and indicators that feature our deep interaction with more than 60 companies in the Vietnamese retail industry. We are confident that our endless efforts and selective study methods have made the research and report reliable and helpful. At such, policy makers, local and foreign retailers, suppliers, and any stakeholders of the retail industry could find great implications for their future directions and actions.

For readers' convenience, the report is structured into the following components: Market, Structure, SWOT, Investment Considerations, Entry Strategies, Operations, Industry Forward Looking, and Key Players' Profiles.

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COMPANIES MENTIONED

Savico, Vingroup, Parkson, AEON, Takeshiyama, Vivo City, Saigon Coop, Citi Mart, HaproMart, FiviMart, MaxiMark, Metro C&C, Lotte Mart, Big C, Auchan, NTUC Fairprice, Berli Jucker, Wellcome, Dairy Farm, E-Mart, U&I, S-Mart, C.T Group, Satra, Intimex, SJC, PNJ, Nguyen Kim, Vinatex Mart, Mobile World, Circle K, Family Mart, Shop & Go, G7 Mart, MiniStop, C Express, New Ch?, CoopFood, SatraFood, Trung Nguyen, Highland Coffee, Starbucks, Coffee Bean & Tea Leaf, Gloria Jean, Lotteria, Pizza Hut, KFC, Burger King, Jollibee, Pho 24, Nam An Group, Viet Thai International, Minh Van Ltd. Co., Sato, SAP, Oracle, Retail Pro International, Wincor Nixdorf.

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