

Vietnam Economic News

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Monthly Newsletter

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Content



1. Vietnam's GDP growth forecast is raised to 6.7% this year by ADB
2. Vietnam's total import-export value reached 637.21 bln USD
3. HCMC rises 3 places in global financial center ranking, surpasses Bangkok
4. New regulation on supporting industries effective from Sept 2025
5. Emerging trends in Vietnam's real estate market
6. Vietnam's steel industry profit to surge in Q3 on price and output rebound
7. Japanese electronics maker Sanyo Denki plans \$47 mln plant in northern Vietnam
8. Vietnam's aquatic exports on pace to hit \$10B
9. Fruit, vegetable exports reach record high at \$1.3B in September
10. US supplants China as Vietnam's largest coconut market



01 • Vietnam's GDP growth forecast is raised to **6.7%** this year by ADB

” ADB raised Vietnam's GDP growth forecast for 2025 to 6.7% driven by robust exports and FDI despite U.S. retaliatory tariffs.

6.7%

Trade & Investment strength

- ▲ Exports grew nearly **15% (\$306 bln)**, and FDI disbursement hit a five-year high of **\$15.4 bln**, indicating strong investor confidence.

U.S. tariffs and slowing orders may affect late-2025 growth, but supportive policies keep Vietnam on track for stable growth in 2026.



\$306 bln

Export Growth

\$15.4 bln

FDI Disbursement

“Better coordination between effective fiscal and monetary policy implementation will help avoid placing excessive pressure on monetary tools and ensure macro-financial stability.”

- by ADB Country Director for Vietnam

02 Vietnam's total import-export value reached **\$637.21 bln**

Vietnam's total import-export value reached **\$637.21 bln**, an increase of **17.2%** or **\$93.7 bln** in absolute terms compared to the same period in 2024.

(According to statistics from the General Department of Customs)

**\$455.45
bln**

FDI Investment

**\$325.26
bln**

Total export value

**\$311.95
bln**

Total import value

The total import value of FDI enterprises reached USD 211.81 billion, up 26.4% (an increase of USD 44.24 billion) compared to the same period in 2024.



03.

HCMC rises 3 places in global financial center ranking

HCMC has risen to **95th** on the Global Financial Centres Index, three spots up from earlier this year, overtaking in the process Thailand’s Bangkok for the first time.

Southeast Asian cities ranking

38th Global Financial Centres Index (GFCI 38)

Time	HCMC	Singapore	Manila	Bangkok	Kuala Lumpur	Jakarta
March 2022	102	6	100	61	48	69
September 2022	104	3	103	79	56	95
March 2023	112	3	108	71	58	83
September 2023	120	3	102	86	80	95
March 2024	108	3	101	93	77	102
September 24	105	4	110	95	59	97
March 2025	98	4	103	96	51	97
September 2025	95	4	104	102	45	91



“Vietnam is setting up an international financial hub straddling HCMC and Da Nang that will offer a broad range of products and services, including banking, capital markets tied to asset and fund management.

04.

New regulation on supporting industries effective from Sept 2025

The Government issued Decree 205/2025/NĐ-CP, effective September 1, 2025, amending Decree 111/2015/NĐ-CP to boost the development of supporting industries.

Financial Support

Up to **50%** funding for machinery, prototypes, design, software, training, experts, patents, IP, and testing in technology transfer projects.

Up to **70%** funding for improving expert quality, consultancy, branding, exhibitions, trade promotion, market access, and cooperation with multinational corporations.



Overall

The new decree strengthens investment, technology, human resources, and market development with up to **70% state support** for key activities.

05.

Emerging trends in Vietnam's real estate market



Analysts from Indochina Strategic, the real estate advisory arm of Indochina Capital (ICC), offer an insight into **10 emerging trends** shaping **Vietnam's real estate M&A market in 2025**.

- 1 **Lower rates, higher dealflow**
- 2 **Banks driving asset repricing as downward pressure on rates narrows margins**
- 3 **Industry leads the market, while real estate and technology maintain strong positions**
- 4 **Strong resilience of Vietnam's hospitality market**
- 5 **Social housing and residential**
- 6 **High return expectations across investor groups**
- 7 **New economy assets in favour**
- 8 **Vietnam's rising construction costs**
- 9 **AI - Digital real estate revolution**
- 10 **Sustainability has become a top priority**

06.

Vietnam's steel industry profit to **surge in Q3** on price and output rebound

Total domestic output in Q3 is projected to rise by **21% year-on-year**, reaching **6.3 million tons**, with the main contributions coming from construction steel and HRC (hot rolled coil), which together account for 65% of total volume.



During Q3, steel producers continued to benefit from low raw material prices, thanks to inventory from Q2.

As a result of stable steel prices and lower input costs, gross margins rebounded significantly, becoming a key bright spot for the steel industry in Q3.

Strong profit growth forecast

MBS forecasts strong profit growth in Vietnam's steel sector, with Q3 and 2025 profits surging on improved margins, stable input prices, and recovering domestic demand.

07.

Japanese electronics maker Sanyo Denki plans \$47 mln plant in northern Vietnam



Japan's Sanyo Denki, a maker of cooling fans and electric motors, has announced its plan to build a JPY7 billion (\$46.82 million) plant in Hung Yen province, northern Vietnam.



08.

Vietnam's aquatic exports on pace to hit **\$10B**

Vietnam is on track to ship more than **US\$10 bln** worth of aquatic products in 2025, but rising trade and technical barriers, particularly in the U.S., may pose challenges.

Aquatic exports from Jan - Aug

**\$7.34
bln**

Top buyers included countries in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP): **China and the U.S.**

Imported pangasius from Jan - Aug

**\$234
mln**

The EU and South Korea also remained steady markets.

09.

Fruit, vegetable exports reach record high at **\$1.3B** in September

Vietnam achieved a milestone in fruit and vegetable exports, earning nearly **US\$1.3 billion** in September, up **41%** year-on-year, a record high.

September marked the first monthly rebound this year, driven mainly by China, which makes up **60%** of **Vietnam's fruit and vegetable exports**.

In September, shipments to this market reached nearly

\$800 mln

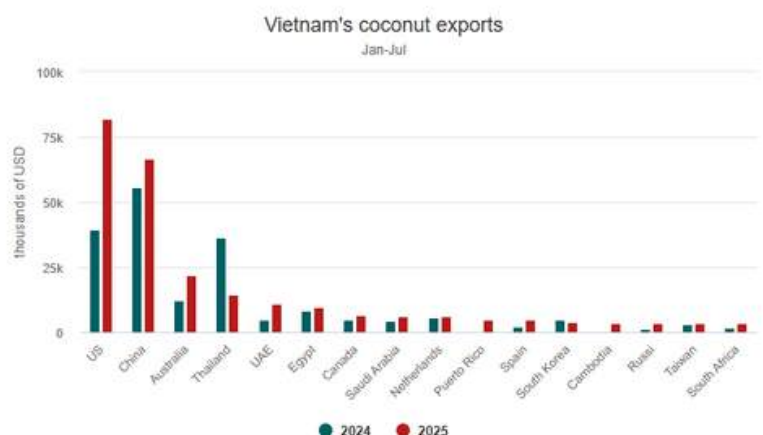
10. US supplants China as Vietnam's largest coconut market

The U.S. has surpassed China as Vietnam's largest coconut export market, buying US\$82 million worth of the fruit in the first seven months of this year, 100% up year-on-year.

**\$8.7
bln**

A leading fruit exporter said the company ships 80–90 containers of various fruits to the U.S. each month, with coconuts making up a large share. Exports to the U.S. rose **25% year-on-year**, largely unaffected by the new tariffs.

Coconut plantations now cover **200,000 hectares** nationwide, producing around two million tons of the fruit annually.



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