Opportunities in the agri-food sector of the Mekong Delta

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03 The Mekong Delta

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Fresh Studio

Our mission

Grow better lives from farmers to consumers, by making our clients successful in the production and marketing of sustainable food

Professional services and R&D firm

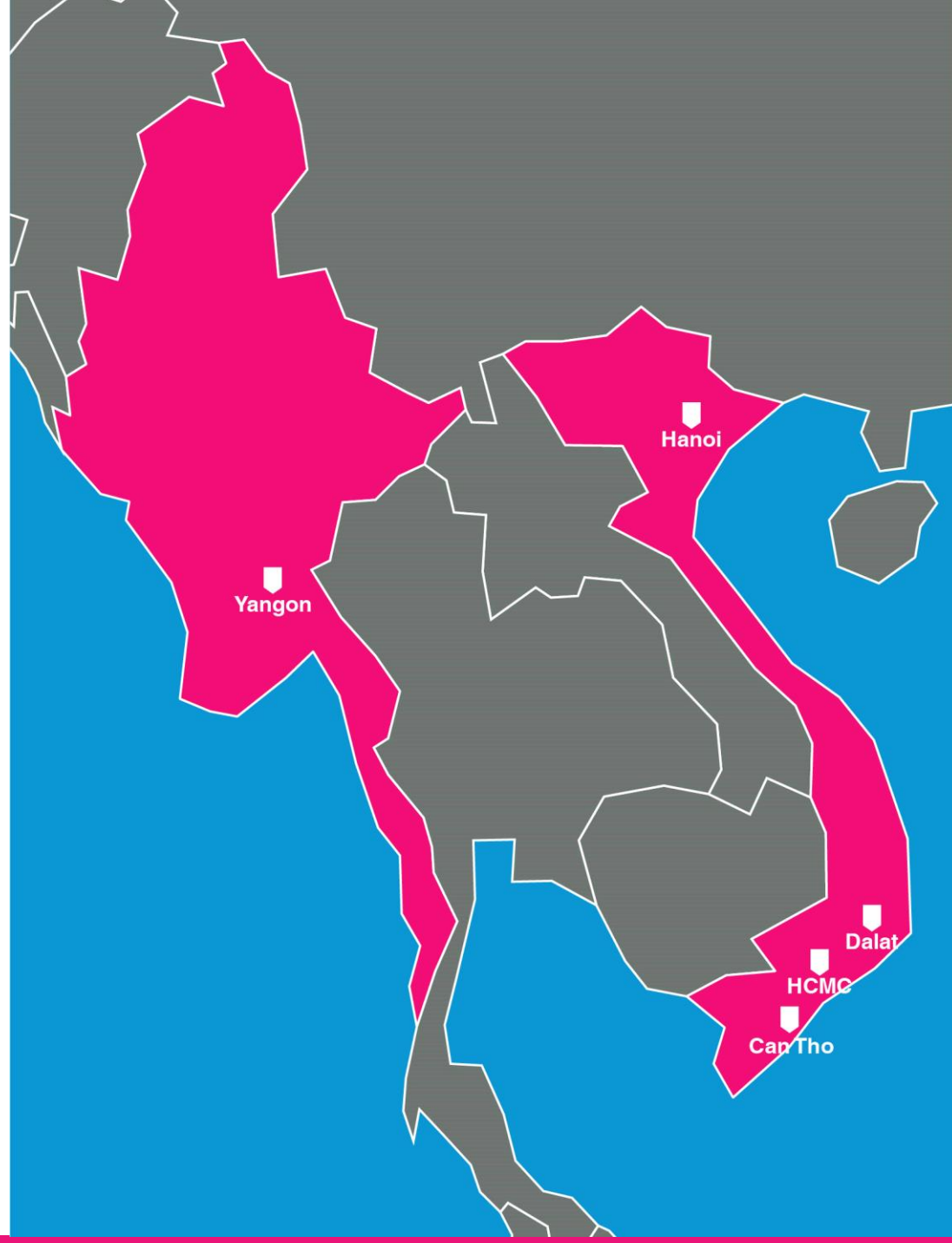
Fresh Studio is the leading agriculture consulting firm in South East Asia, assisting clients with every aspect of their food provision, from farm to fork, from production to marketing

What we do

- Services from production to marketing
- Multi-disciplinary teams comprised of 60 staff
- Delivering 30+ projects per year between Vietnam, Myanmar and Indonesia.

Where we are

- Vietnam offices: Hanoi, Dalat, HCMC, Can Tho
- Myanmar office: Yangon
- The Netherlands



2. THE RISE OF VIETNAM

Impressive growth

- The GDP grew from just US$ 6.5 billion in 1990 to US$ 262 billion in 2019.
- The Vietnamese GDP grew in past 30 years by 6.8% per year.
- While the Dutch GDP was 49 times larger than the Vietnamese GDP in 1990, this figure reduced to 3.5 times in 2019.

Source: Worldbank, 2020

Vietnam compared with Southeast Asian countries

- The Vietnamese population grew from 68 million in 1990 to 96 million in 2019. By 2025 there will be 100 million Vietnamese.
- The Vietnamese GDP per capita developed from just US$ 100 per person in 1990 to US$ 2,715 in 2019
- The Vietnamese poverty headcount at US$ 1.90 per day, dropped from 52% in 1992 to 2% in 2018.
- The 37% urbanization level of Vietnam, is relatively low compared to the more developed SE Asian countries

Country	Population in mln	Urban population (% of total population)	GDP (US$ bn)	GDP per capita (current US$)	Average GDP annual growth 1990-2019
Malaysia	32	77	365	11,415	5.8
Thailand	70	51	544	7,808	4.4
Indonesia	271	56	1,119	4,136	5.0
Philippines	108	47	377	3,485	4.6
Vietnam	96	37	262	2,715	6.8
Lao PDR	7	36	18	2,535	6.8
Cambodia	16	24	27	1,643	6.0
Myanmar	54	31	76	1,408	8.4

Source: Worldbank, 2020

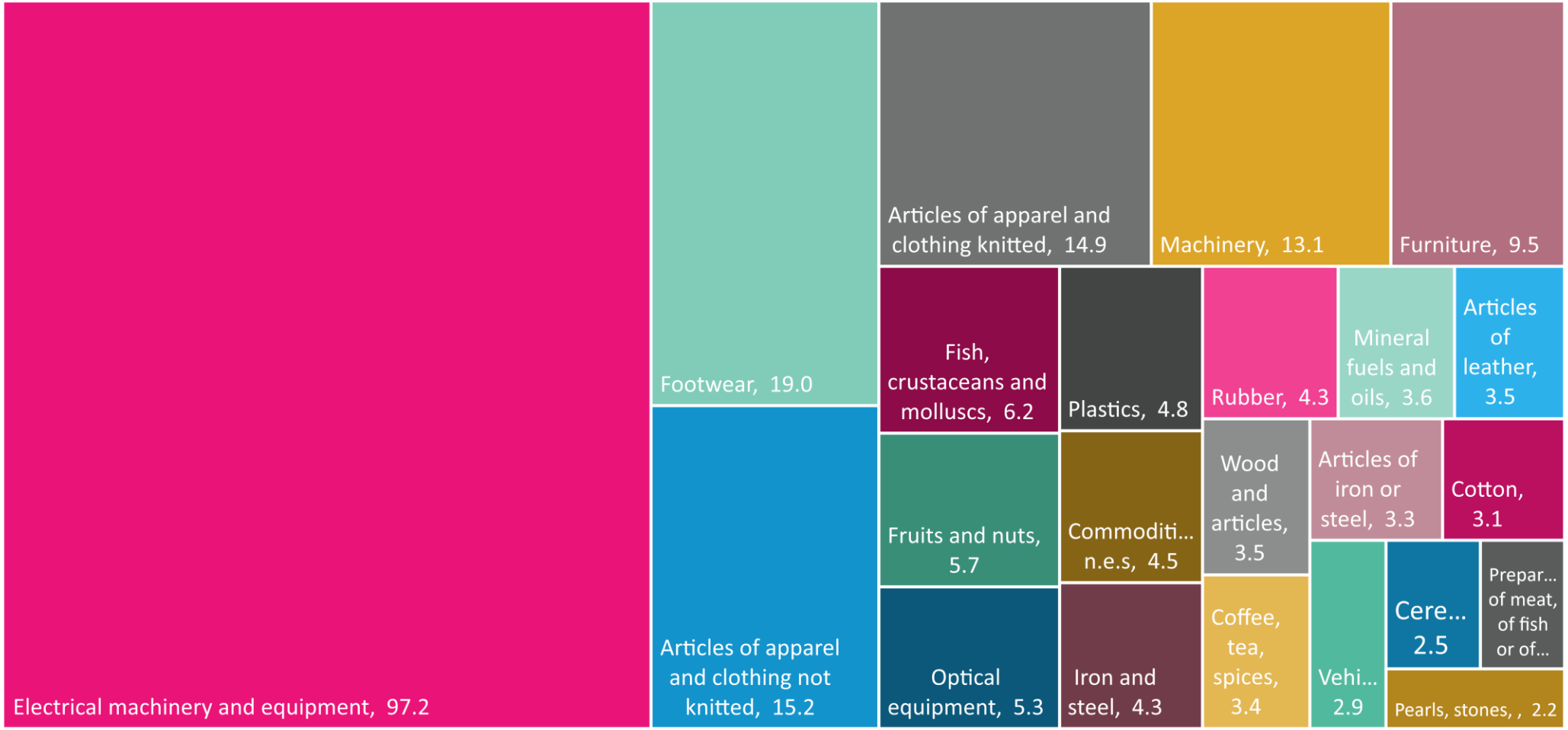
Growth of exports and imports

Source: ITC/Trademap, 2020

- Vietnam joined the WTO in 2007. The more open economy led at first to a more negative trade balance
- But since 2012, Vietnam developed a positive trade balance and which growing fast

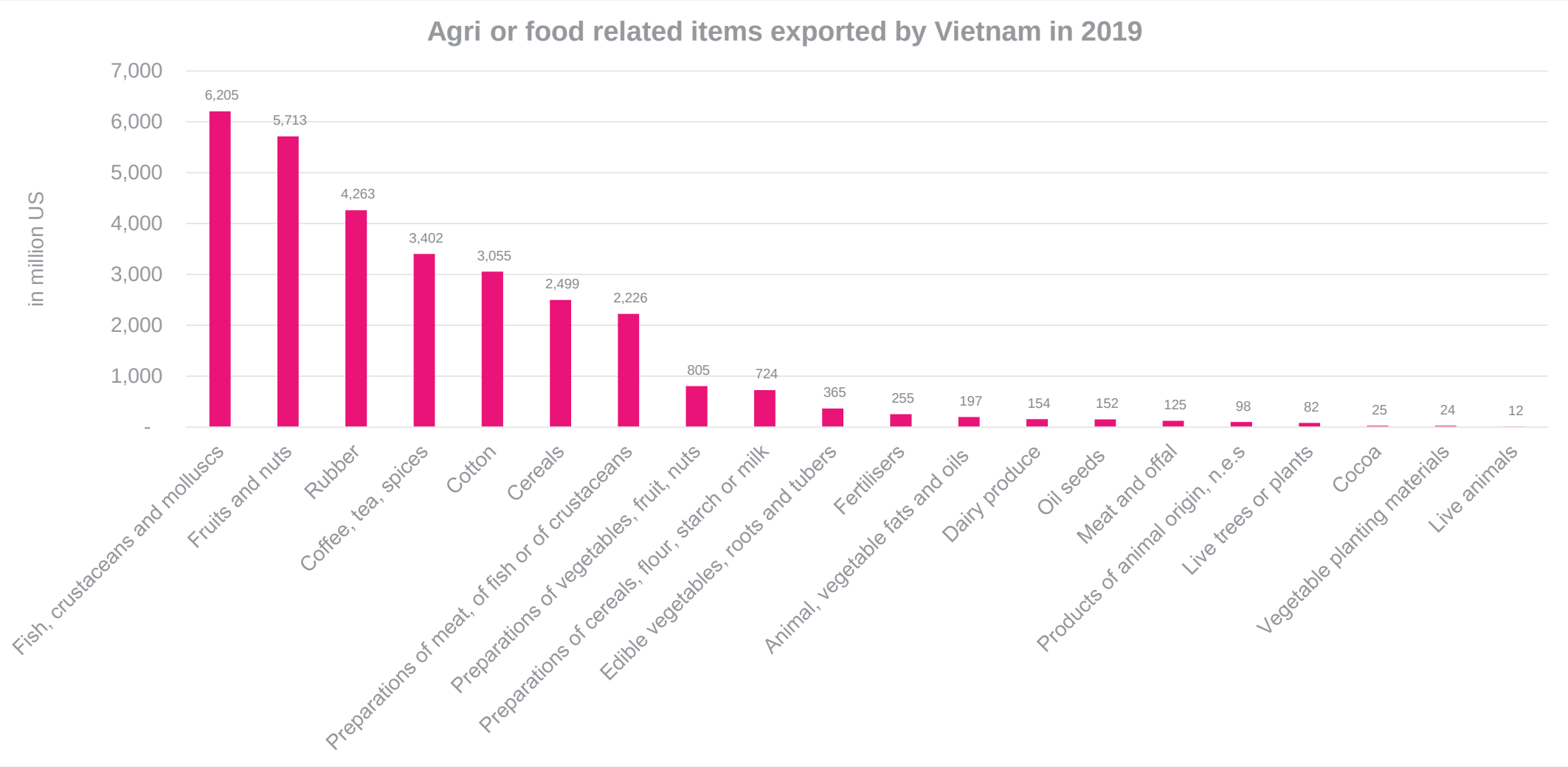
Key export commodities

Items exported by Vietnam in 2019 with a value of US$ 2 billion or more (in US$ billion)



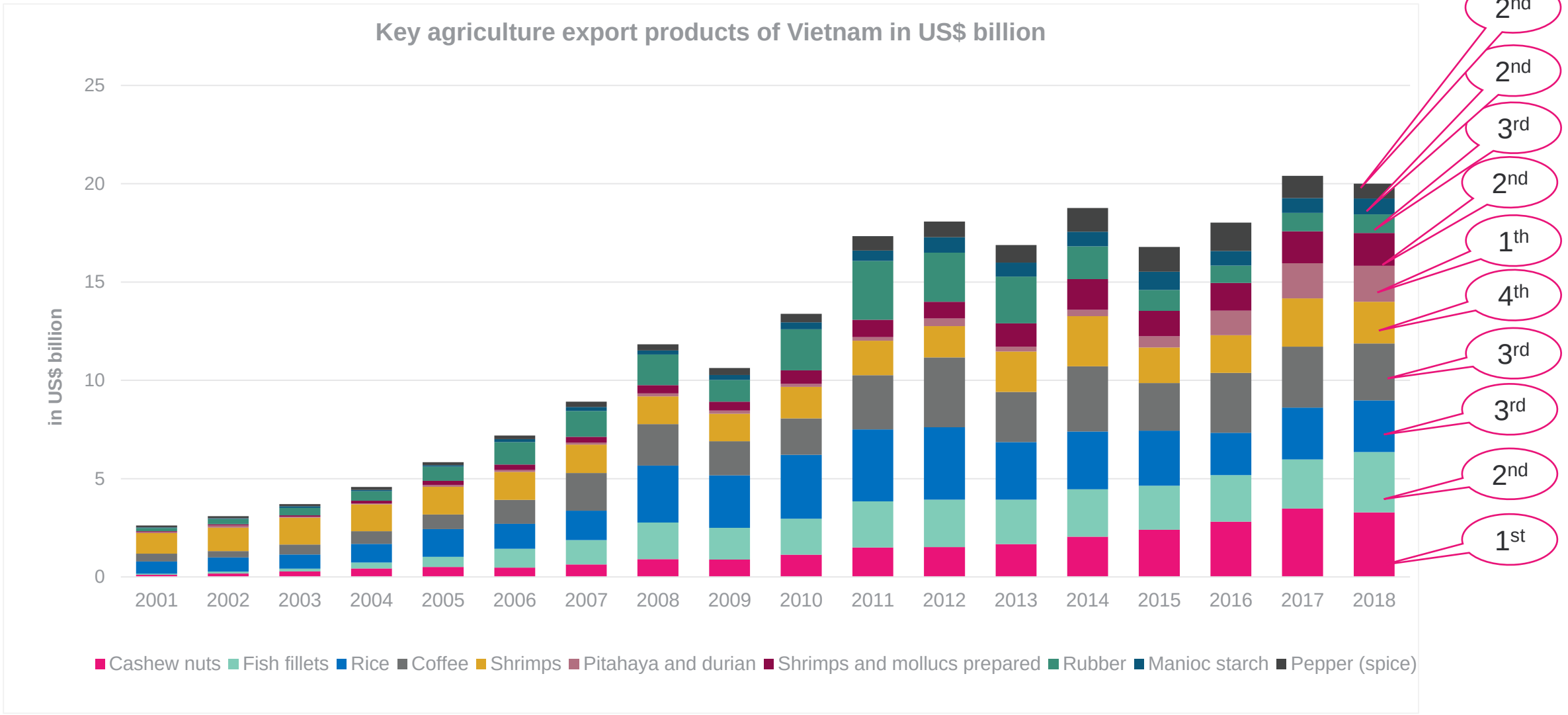
Source: ITC/Trademap, 2020

Key export commodities



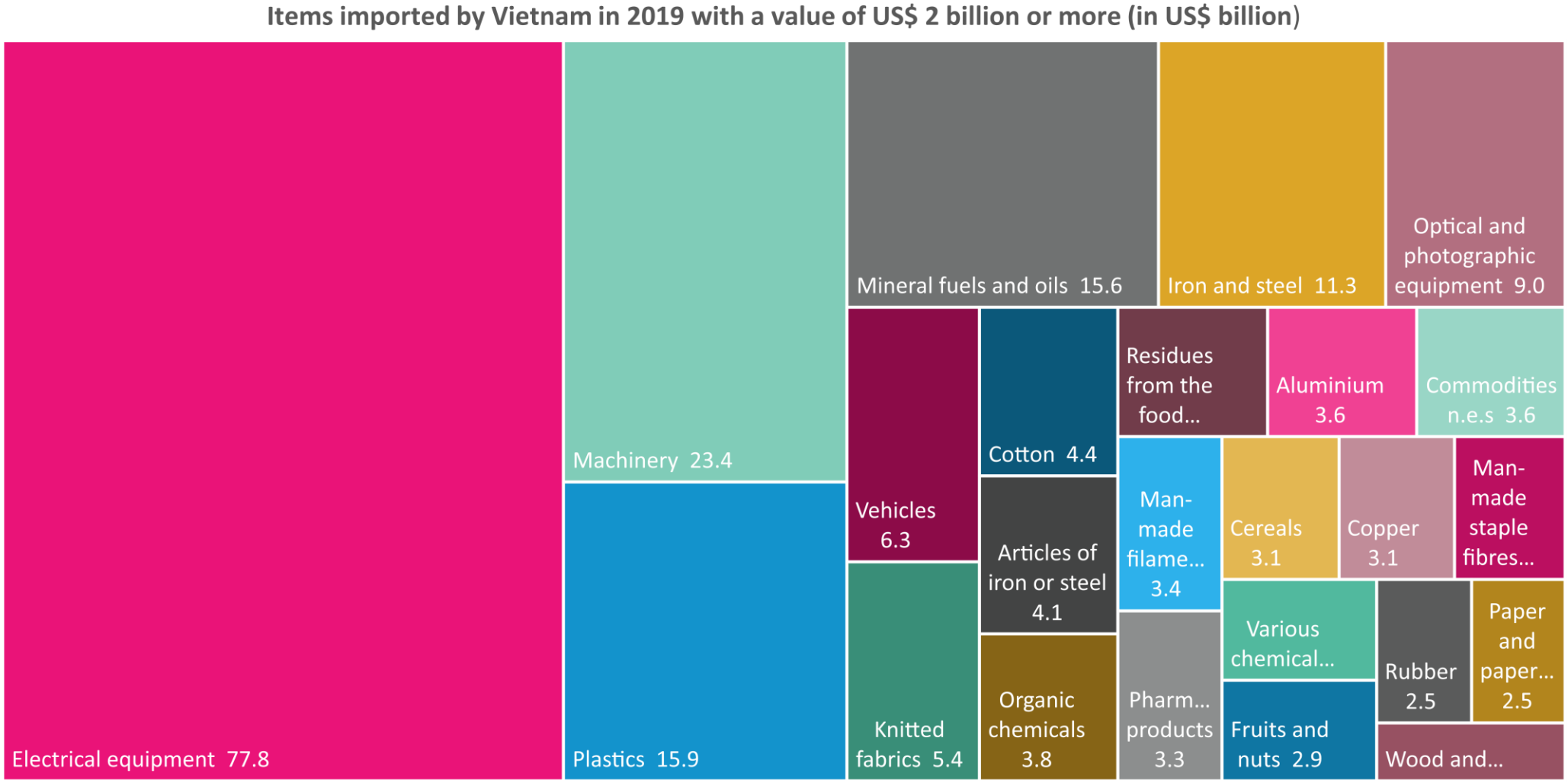
Source: ITC/Trademap, 2020

Agriculture powerhouse



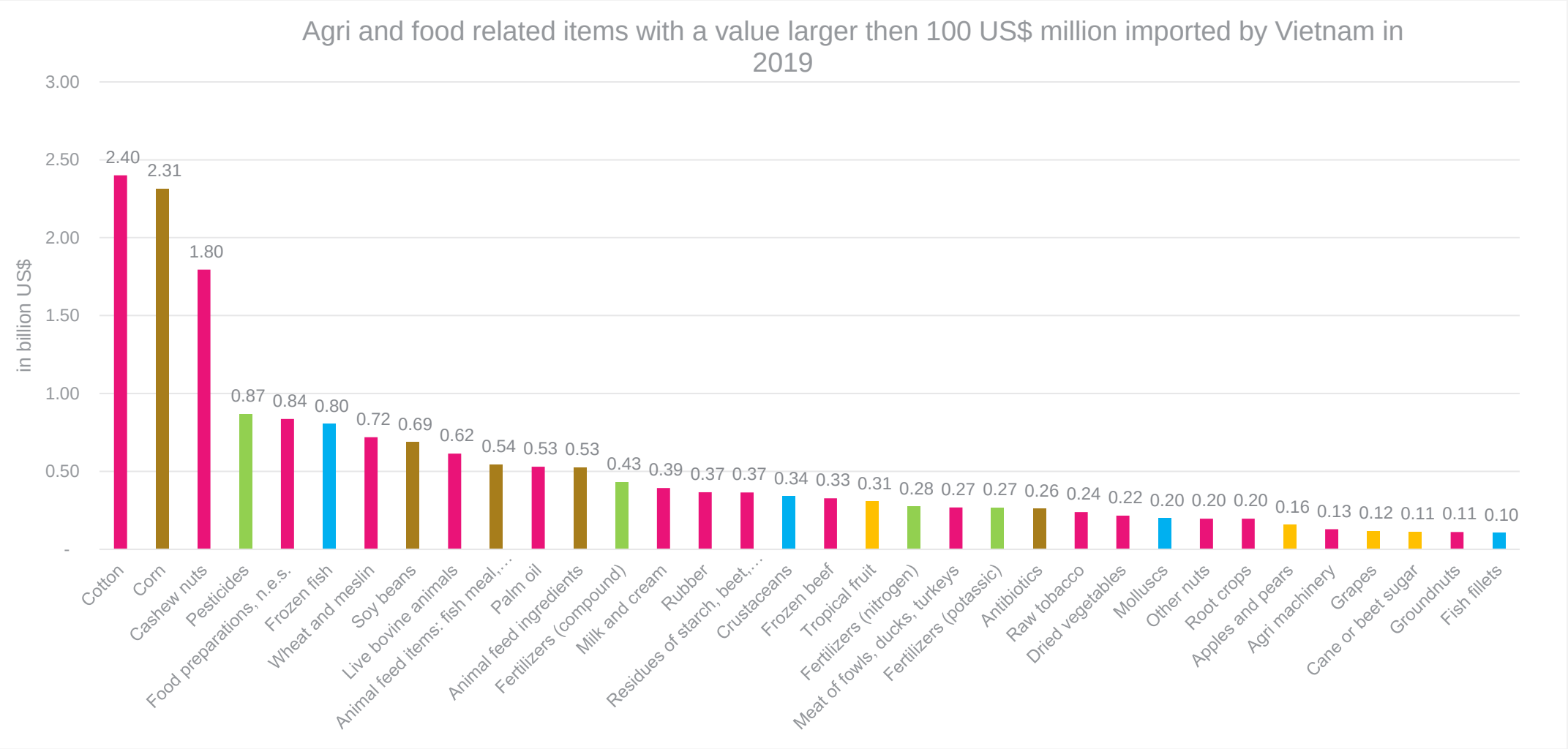
Source: ITC/Trademap, 2020

Key import commodities



Source: ITC/Trademap, 2020

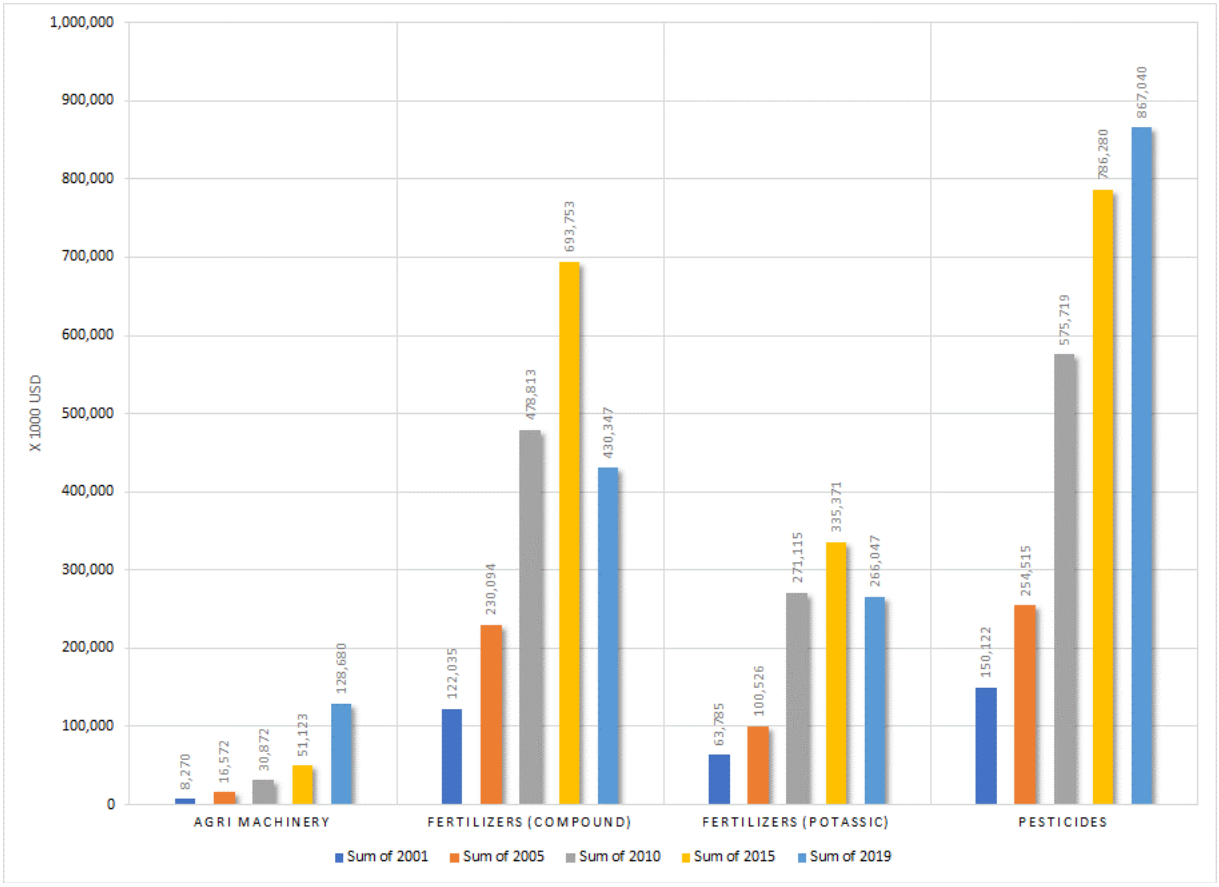
Key agri-food import commodities



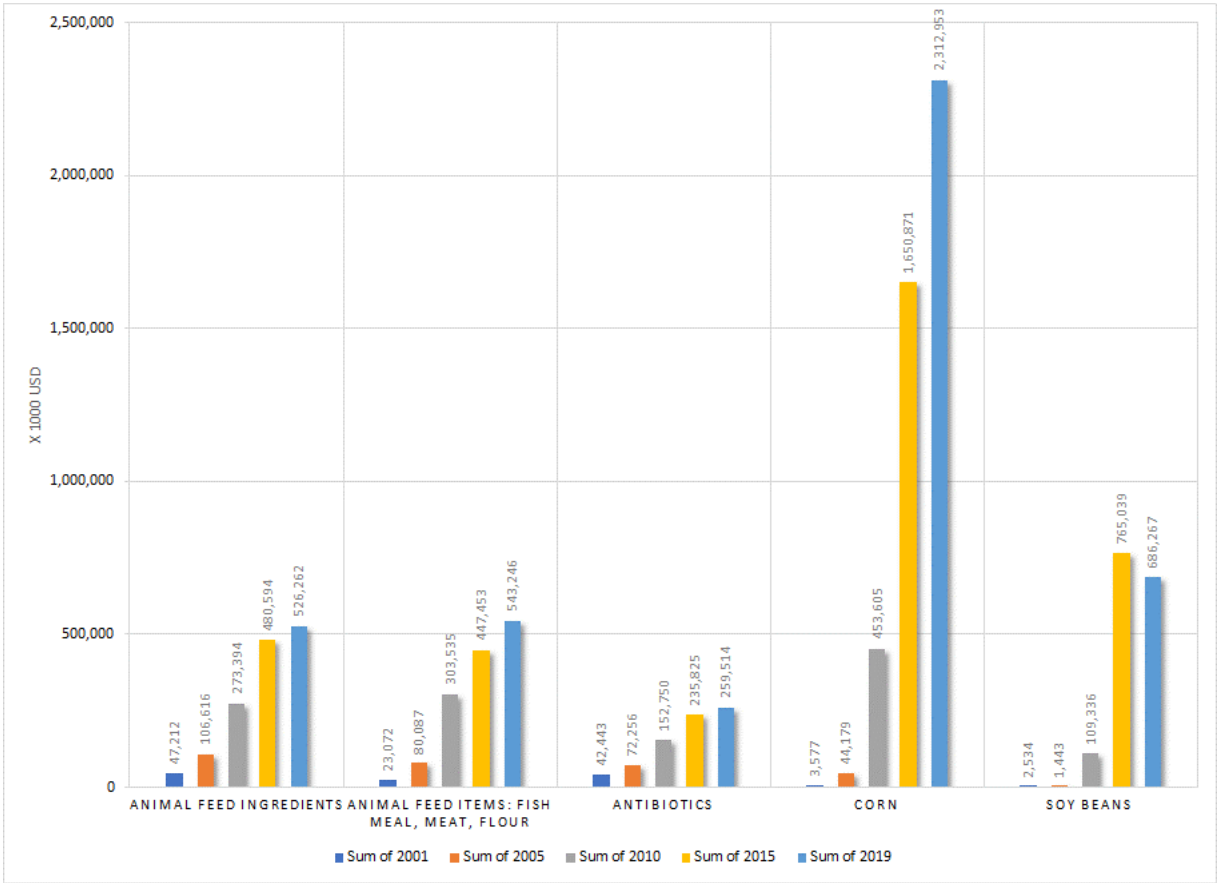
Source: ITC/Trademap, 2020

Crop and livestock sector related imports of inputs: 2001-'05-'10-'15-'19

Crop sector related inputs



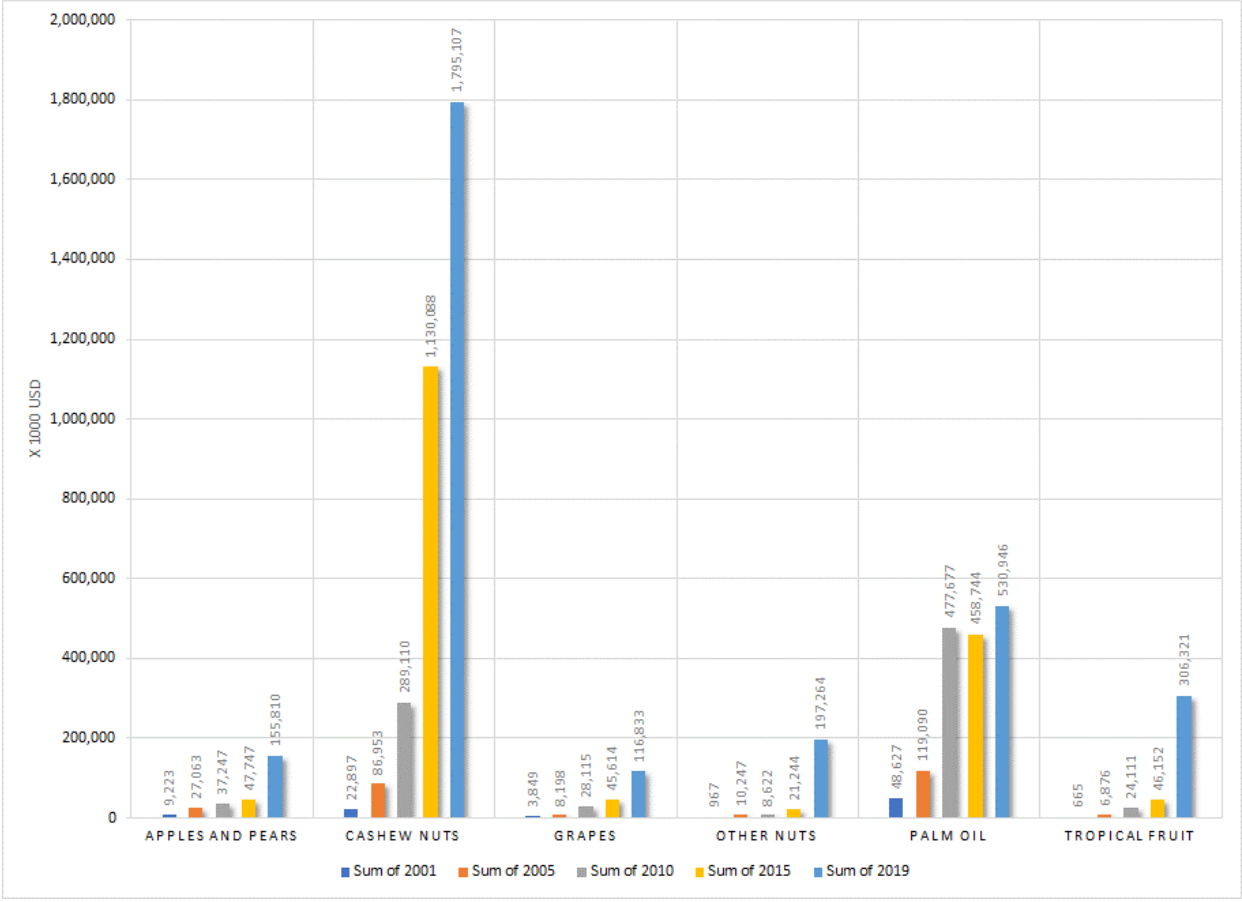
Livestock related inputs



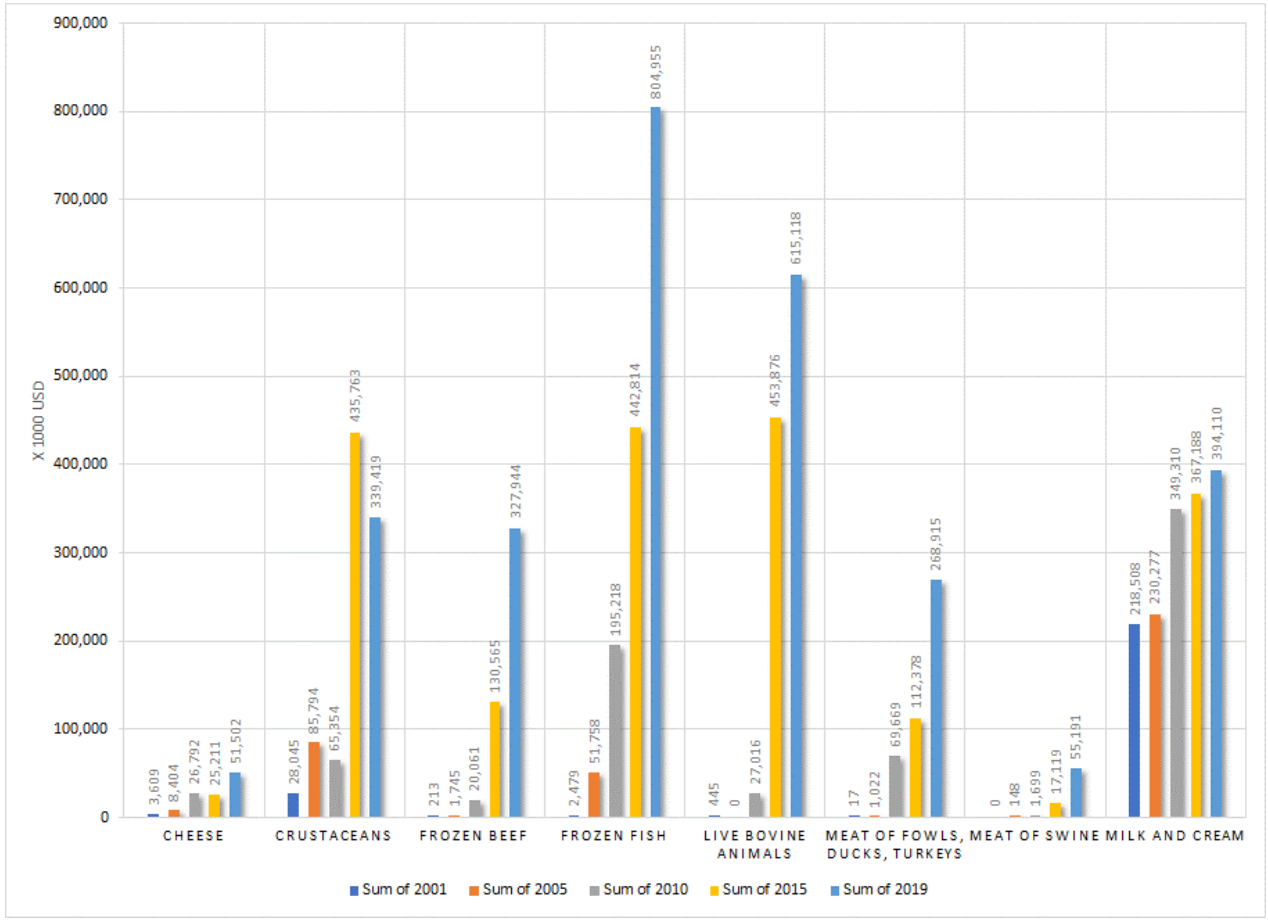
Source: ITC/Trademap, 2020

Food related imports: 2001-'05-'10-'15-'19

Crop related



Animal/seafood protein related



Source: ITC/Trademap, 2020

3. THE MEKONG DELTA

The Mekong Delta

General features

- 13 provinces out of the 63 in Vietnam.
- Main city: Can Tho (180 km from Ho Chi Minh City).
- Total area of the Mekong Delta: 4 million ha.

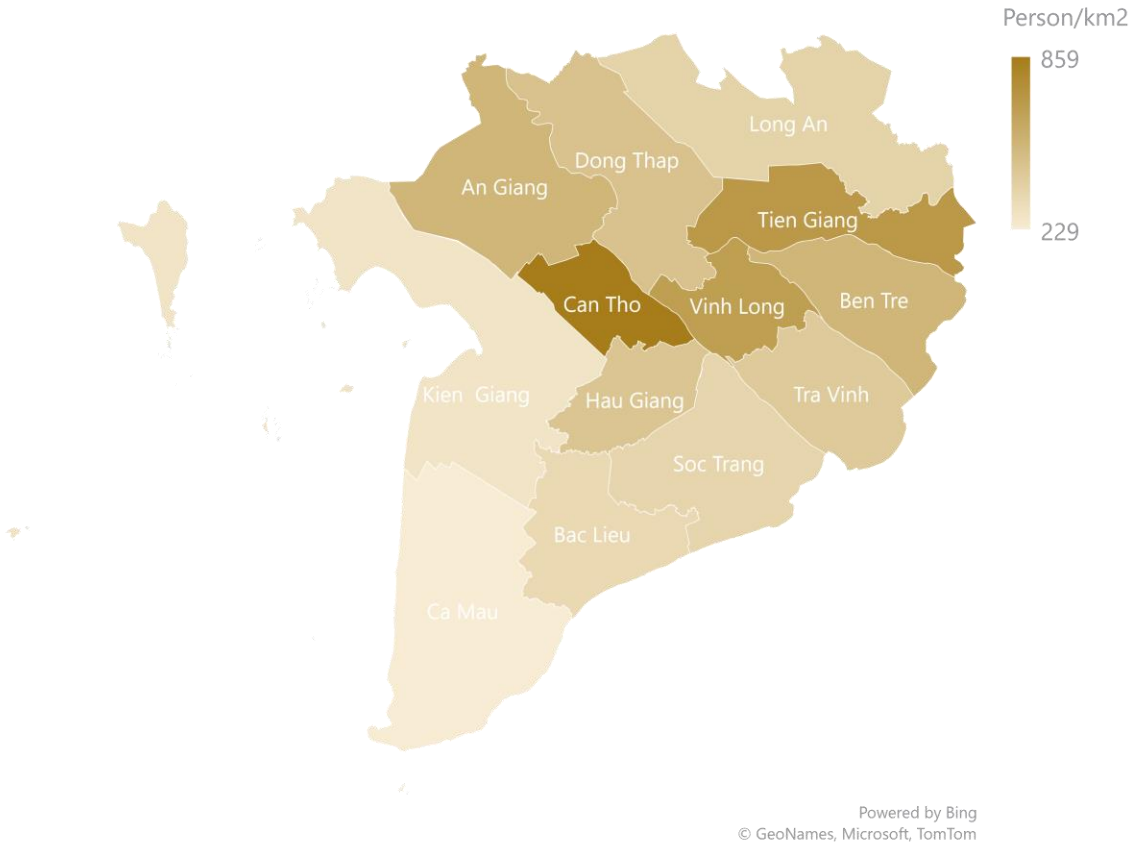
Population

- Population of 18 million (423 persons/km^2) *(GSO, 2019)*
- 73% of the population is rural
- Highest density of population along the main highway connecting HCMC-Can Tho (e.g. Can Tho, Vinh Long, My Tho)

GDP

- US$ 35.6 billion (2018) → 14% of national GDP

Population density in the Mekong Delta

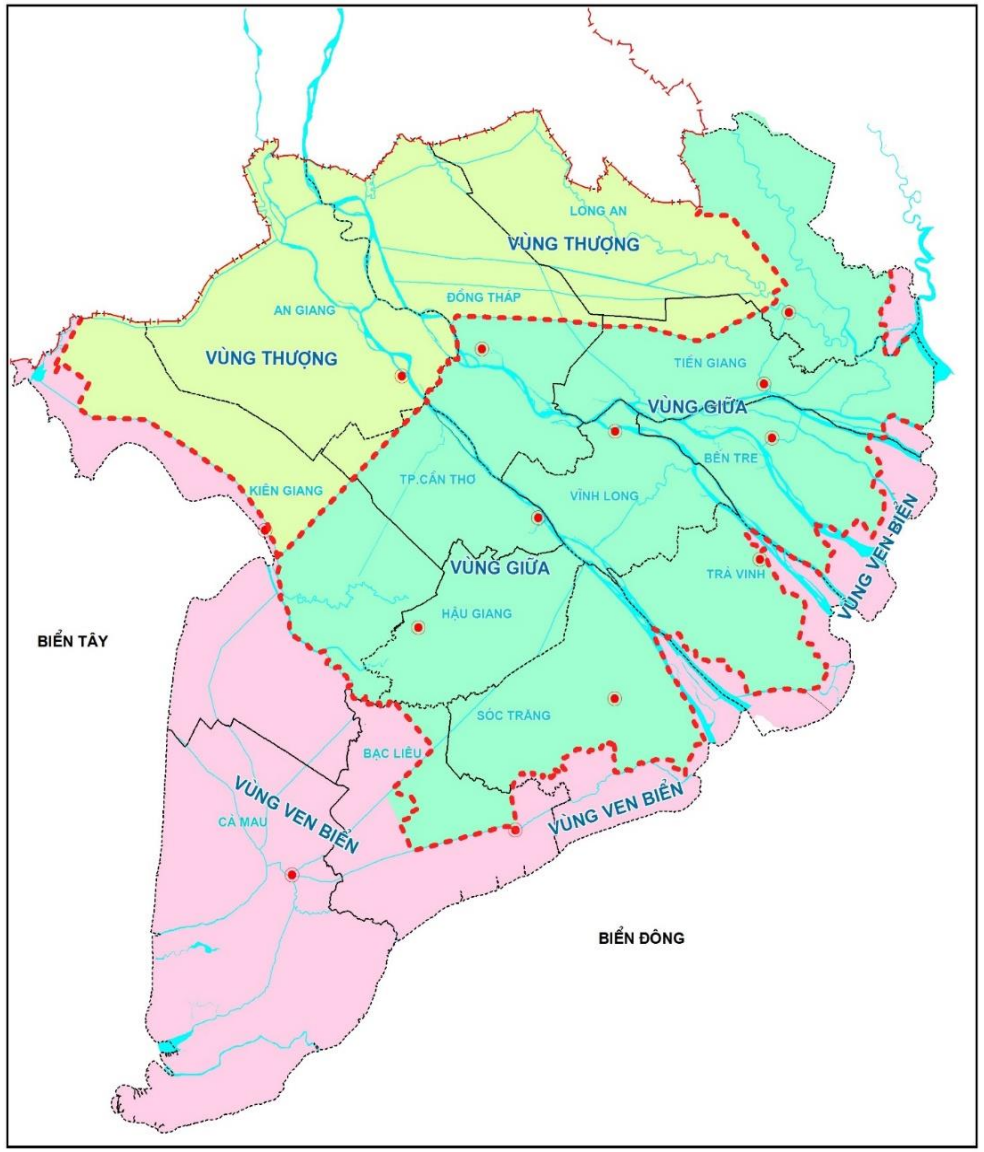


Type of population	*Population in mln*	*Percentage*
Urban	4.4	24%
Rural	12.9	73%

Source: General Statistics Office of Vietnam (GSO) (2019)

Zonation of the Mekong Delta

- **Upper delta: upstream part of the Mekong Delta**
  - 1.1 million ha; 29% of MD the population, including 19% of the MD labor force
  - 28% of Mekong Delta GDP (rice, fishing, aquaculture…)
- **Middle delta: downstream part of the Mekong Delta**
  - 1.7 million ha; 51% of the MD population, including 62% of MD labor force
  - 50% of Mekong Delta GDP (rice, horticulture, shrimp aquaculture, food processing…)
- **Coastal zone: coastline of the MD composed of Ca Mau peninsular and Eastern estuaries**
  - 1.1 million ha; 21% of MD population, including 18% of MD labor force
  - 19% of Mekong Delta GDP (aquaculture, coastal fishing, processing, fossil electricity, renewable electricity-wind)

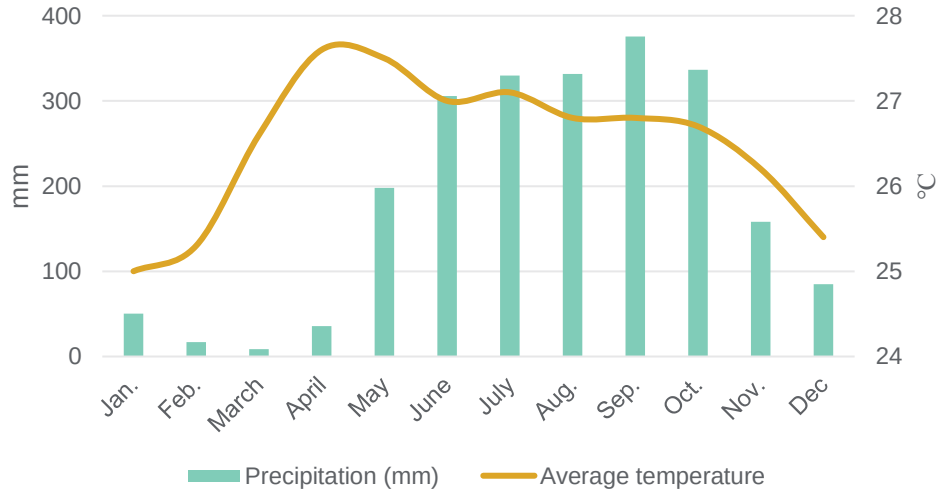


Source: IPSARD (2020)

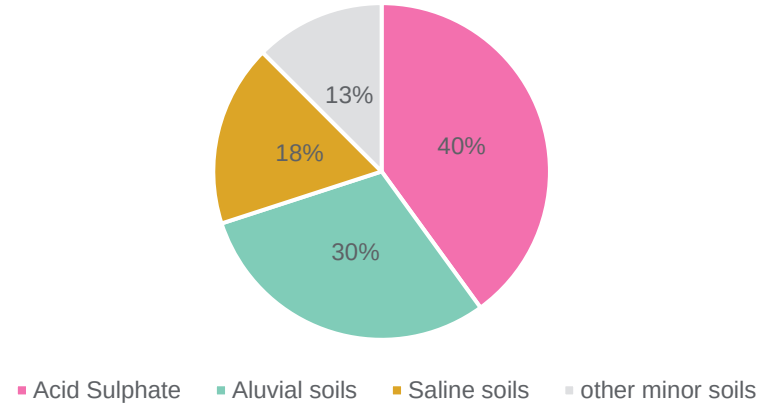
Natural conditions

- **Tropical climate**
  - Average temperature varies from 25 to 28℃.
  - Annual rainfall is approx. 1,800 mm
  - 90% of the rainfall occurs in the rainy season from May to November
- **Soils suitable for a wide range of agricultural systems**
  - Alluvial soils mostly in the Upper and Middle delta → the most fertile land in the delta, suitable for diverse crops (rice and fruit)
  - Some areas are covered of Acid Sulphate soils but thanks to the network of canals dug during the 1980's → flushed away most of acidity in the shallow layer
  - Saline soils mostly found in the coastal zone → suitable for salt-water and brackish aquaculture

Weather seasonality in the Mekong Delta



Diversity of soils in the Mekong Delta



Source: GSO (2019), IPSARD (2020)

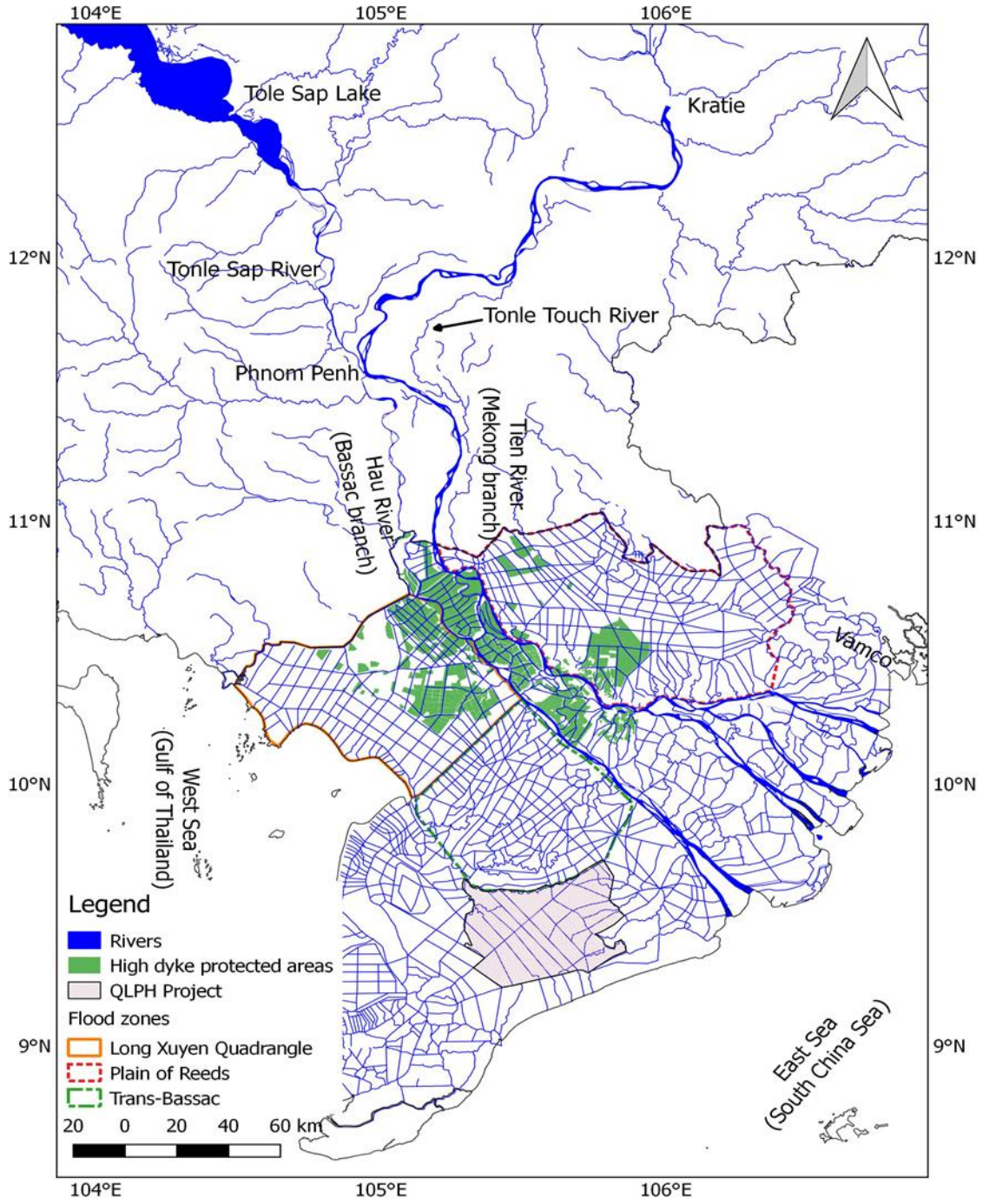
Hydrological regime

- Dense network of waterways for irrigation, salt intrusion prevention and against flood *(natural rivers, creeks, man-made canals)* of 4,952 km → **0.68km per km2**

- **Upper delta** is influenced by the floodwater from the Mekong River, according to the seasons (rainy-dry seasons). This area plays a key role in the water distribution to downstream zones
  - 2 floodplains working as natural reservoirs.

- **Middle delta** is influenced by both Mekong river regime and the Tidal regime.

- **Coastal zone** characterized by brackish water suitable for shrimp aquaculture but also influenced by freshwater in the rainy season and floodwater from upstream.



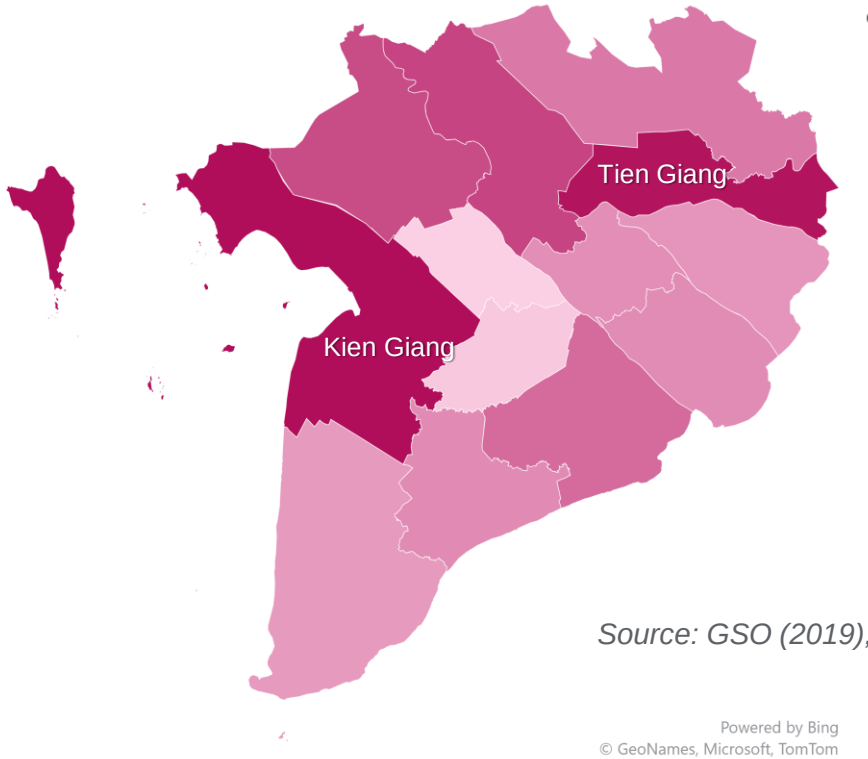
Source: IPSARD (2020)

Socio-economic conditions

- The Mekong Delta is the most important agricultural production region of Vietnam
- Dynamic region: Agriculture GDP growth rate higher than national average
  - 2017-2018: +4.6% in the MD vs +3.7% nationwide
- Agriculture sector accounts for 32% of the GDP of the Mekong Delta.
- Agriculture employs 49% of the labour force in the region.
  - Most of the industry and services sector composed of input supply, processing, trade and transport of agricultural products.
  - Kien Giang and Tien Giang provinces contribute the most to the region agricultural economy (26% together).

GDP of the Mekong Delta by sector (2018)

Activities in the Mekong Delta	*Agriculture, forestry and fishing*	*Industry and construction*	*Services*	*Other*
GDP (billion USD)	10.3	9.1	14.7	1.5



Source: GSO (2019), IPSARD (2020)

Importance of the Mekong Delta for agriculture

- Rice outputs: 24,5 million tons (**56%** of Vietnam production)

- Aquaculture: 2.9 million tons (**70%** of total Vietnam production)
  - Shrimp: 672,000 tons (83.5%)
    - Brackish water area: Mostly in Coastal zone of the Mekong Delta (Bac Lieu, Kien Giang, Ca Mau, Soc Trang).
  - Pangasius: 1.41 million tons (98%)
    - Freshwater area: Mostly Dong Thap, Can Tho and An Giang.

- Fruits: 4.3 million tons (**40%**)
  - Oranges, bananas, coconuts, mangoes, dragon fruits,…
  - Mostly takes place in Middle delta region.

- Other:
  - Vegetables: ~ 4.0 million tons (24%)
  - Livestock (live weight): ~ 560,000 tons (11%)

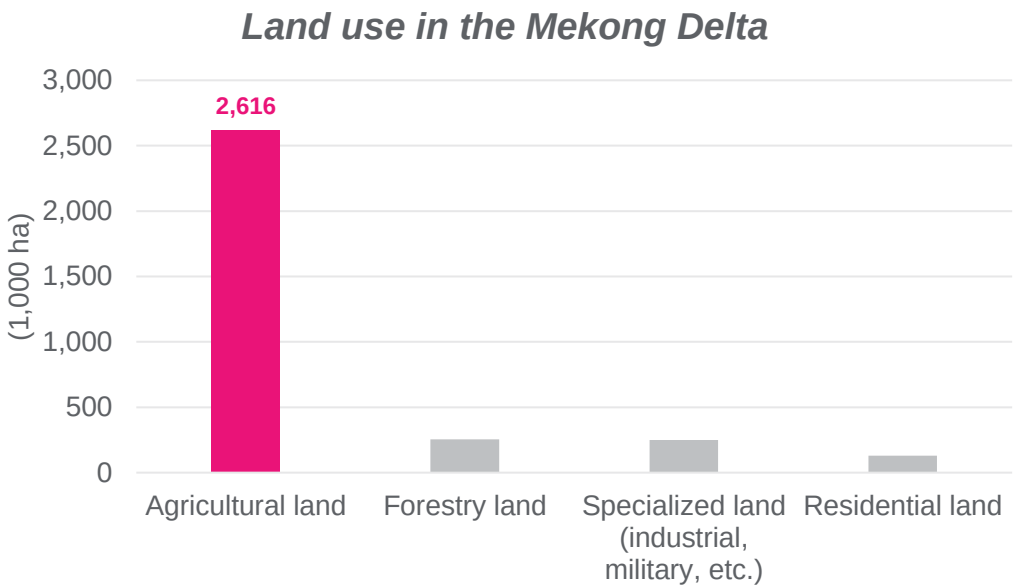
- **Major exporter of key agricultural products.**

Export revenue (2018)	Billion USD	% Vietnam export
Rice	2.45	80
Pangasius	2.15	95
Shrimp	2.13	60
Fruits	1.7	65
Total key agricultural products:	**8.43**	**20**

Source: GSO (2019), IPSARD, 2020

Land use and livelihood

- **Despite recent urbanization and development, the Mekong Delta is still primarily agricultural and rural:**
  - Nearly two-third of the Mekong Delta area (65%) is dedicated to Agriculture.
- GSO reports only 6,000 commercial company farms in the Mekong Delta (2019):
  - 54% of them are crop farms→ Rice fields or fruit trees
  - 30% of farms are specialized in livestock (buffaloes, cow, poultry and pig)
  - 15% are specialized in fish farming
- But → Mekong Delta counts millions of small-holder farms !
- Households of the Mekong Delta rely mostly on **agriculture and capture fisheries.**

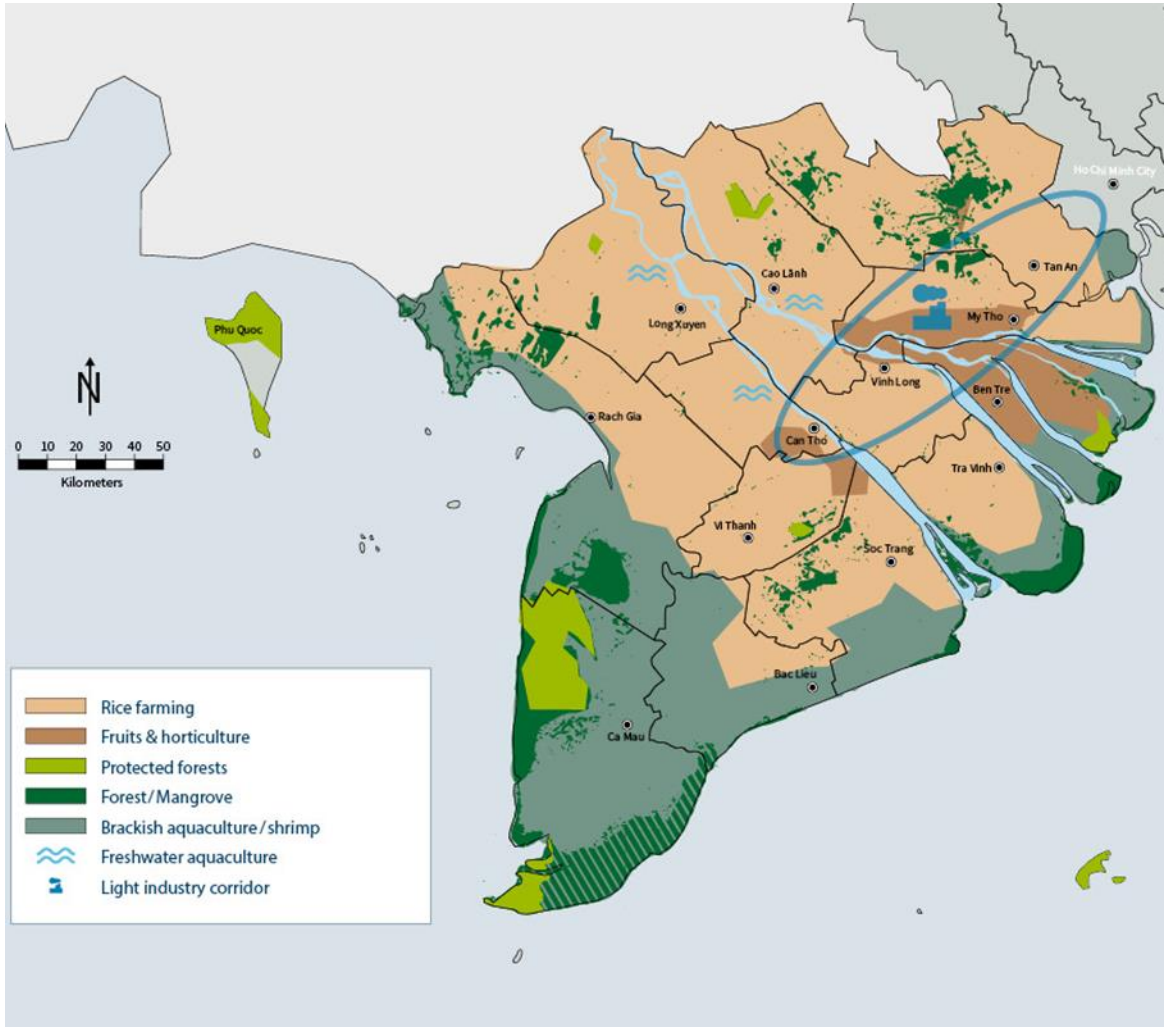


Source: GSO (2019), IPSARD (2020)

Land use transformation

- Transformation of land use → driven by agricultural and water resource policies in the Mekong Delta
  - Water control infrastructures
  - Assure Vietnam's food security → intensification of rice production
- Fruit & horticulture land area increased these past years
  - Nowadays, more than 300,000 ha dedicated to fruit cultivation.
- Aquaculture coverage increased these past years, especially in the Coastal zone for brackish aquaculture.
- Mekong Delta starts to become attractive for light industry (e.g. food processers and manufacturers of furniture, garments, shoes and leather): More workforce & lower land costs than in Dong Nai or Binh Duong.

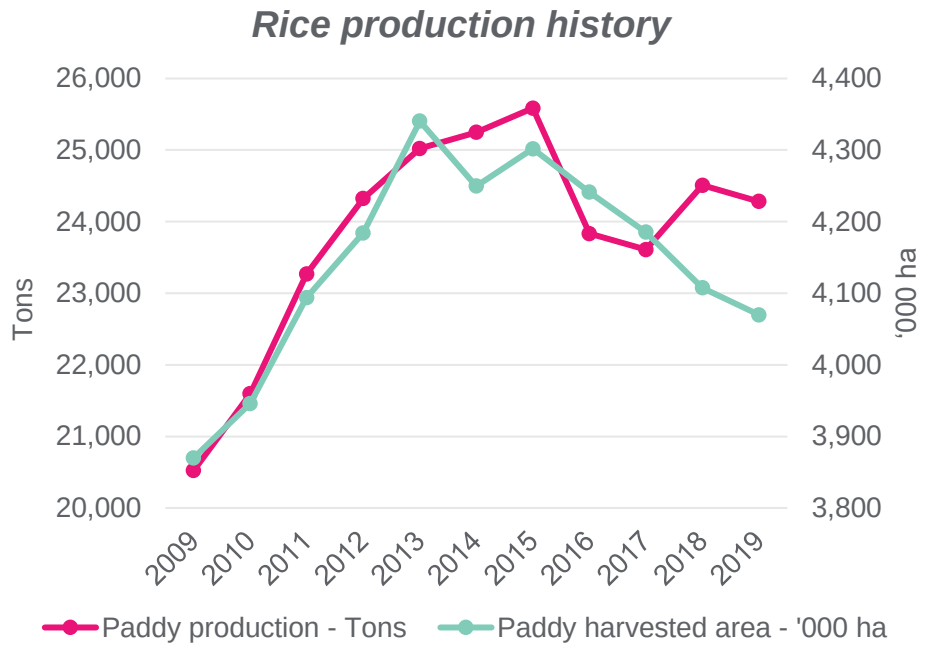
Map of the land use in the Mekong Delta

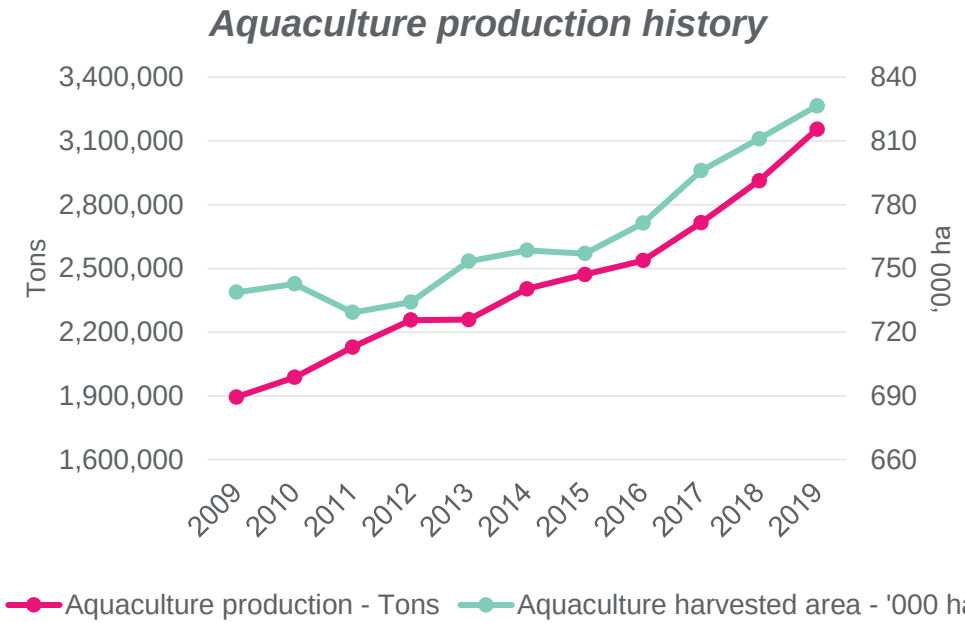


Source: GIZ (2015), Invest in the Mekong Delta website

Agriculture history & trends

- **Significant increase of rice production until 2015**
  - **Intensification of rice farming** (from one to triple-crop seasons) to assure self-sufficient food security and export.
- **Rice production stable, although a slight decline these 5 last years**
  - Conversion into fruit trees/ aquaculture or mixed rice-aquaculture
  - Emergence of better-quality varieties of rice
- **Aquaculture booming these 10 past years**
  - A response to the reduction of capture fisheries
  - Pangasius and Shrimp production are key commodities of the sector
- **Key tropical fruit production area of Vietnam**
  - Main fruit crops: mangoes, citrus, dragon fruits, jack fruit, durian, banana and coconuts.





Source: GSO (2019), IPSARD (2020)

Challenges of the Mekong Delta

- **Climate change**
  - Severe drought periods, while the Mekong Delta is dependent on upstream Mekong River managed dams by China
  - Sea level rise
- **Water pollution from agriculture**
  - About 2 million tons of fertilizers and 500,000 tons of pesticides* are annually used in the MD (accounting for 55% of total import for fertilizers and pesticides in Vietnam).
- **Over-extraction of groundwater & land subsidence**
- **Salinity intrusion & soil erosion**
  - Full-dike system led to reduction of freshwater coming from upstream
  - Lack of sediment supply from upstream river and increase of uncontrolled sand mining.

Source: IPSARD (2020)

Sea level rise projections for the Mekong Delta in cm

Coast section	2030	2040	2050	…	2100
East Sea from Ke Ga to Cam Mau top	12 (7÷18)	17 (10÷25)	22(13÷22)		53 (22÷77)
West Sea from Cam Mau tip to Ha Tien	12 (7÷18)	17 (10÷15)	23 (14÷22)		55(33÷78)

Source: 2016 Climate Change and Sea Level Rise for Vietnam, MONRE

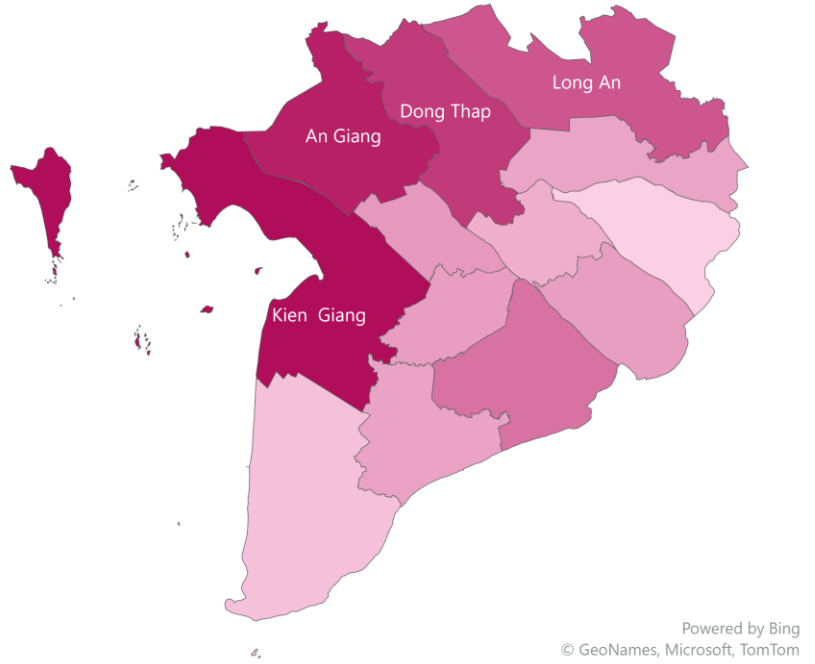
** Pesticides classified under HS code 3808: insecticides, rodenticides, fungicides, herbicides, anti-sprouting products and plant-growth regulators, disinfectants and similar products, put up for retail sale or as preparations or articles, e.g. sulphur-treated bands, wicks and candles, and fly-papers*

4. KEY AGRI SECTORS IN THE MEKONG DELTA

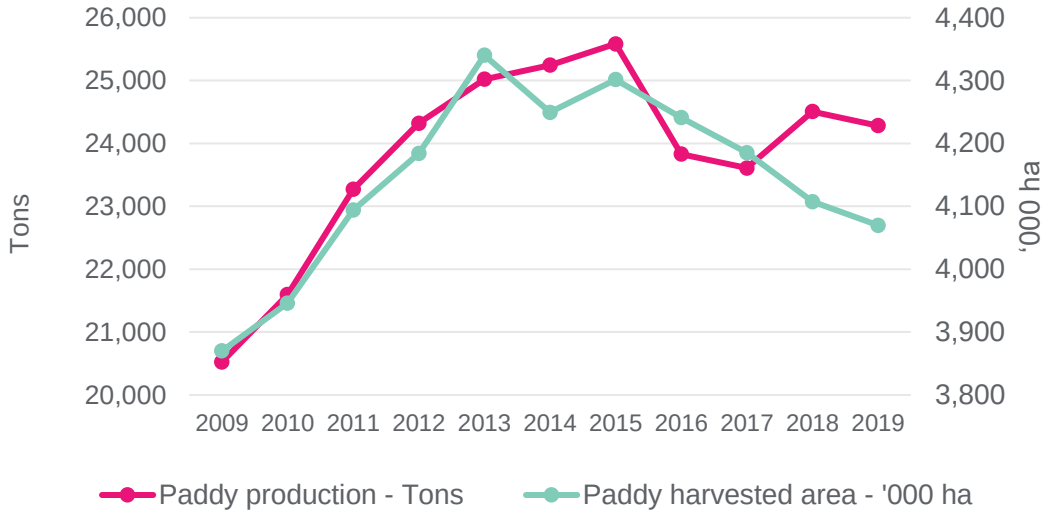
Rice production

- About 2 million ha → 24.5 million tons.
- **Upper delta** = Most important rice production center of the region
  - **48%** of the regional rice production in 2019 → 12 million tons per year
  - **Kien Giang:** 400,000 ha of rice planted area and 3 harvesting seasons resulting in an annual production of 4.3 million tons (2019) → 17% of the MD rice production.
- Significant increase of rice production until 2015
  - **Intensification of rice farming** (from one to triple-crop seasons) to assure self-sufficient food security and export.
- Rice production keeps a slight decline these 5 last years
  - Conversion into fruit trees/ aquaculture or mixed rice-aquaculture
  - Emergence of better-quality varieties of rice

Rice production in the Mekong Delta (2019)



Rice production history



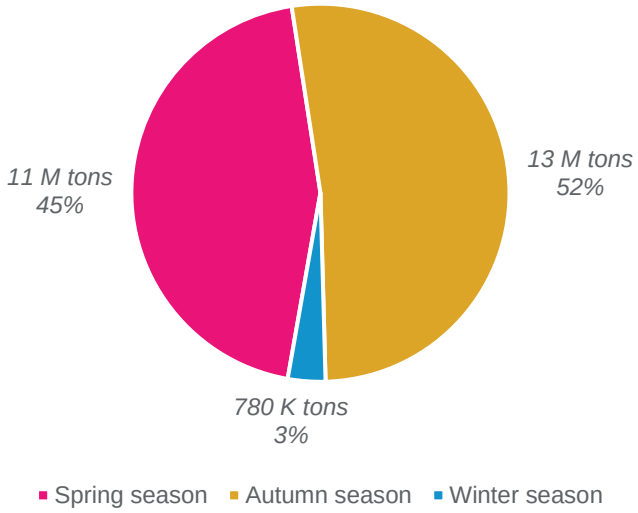
Sources: GSO 2019; IPSARD 2020

Rice crop systems

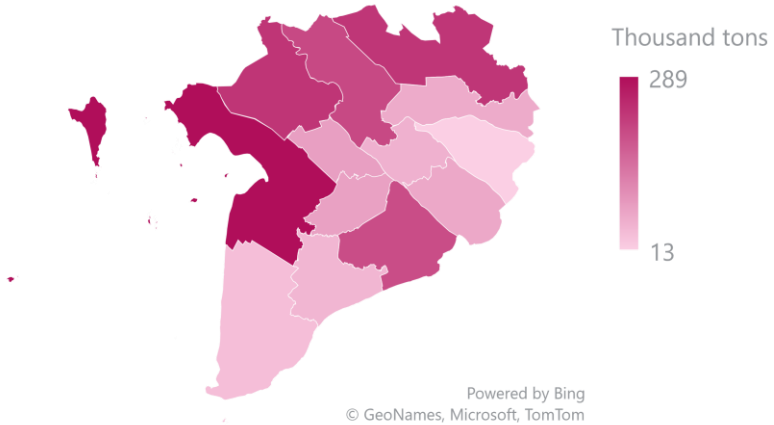
- **Whole delta is practicing either double or triple-crop seasons**
  - Upper delta: Intensive rice farming benefitting from dense dike networks to protect rice fields from flood.
  - Middle delta: lower production than upper region. Progressive shifting from rice to fruit cultivation or aquaculture.
  - Coastal zone: no favorable conditions to grow triple rice. Most of 2-crop rice areas are shifted to 1-crop rotated or intercropped with shrimp farming.

- **Spring & Autumn paddy seasons** are the key seasons (respectively, 45% and 52% of the annual MD production). Winter paddy season provides low volumes and is mostly ensured by Kien Giang province.

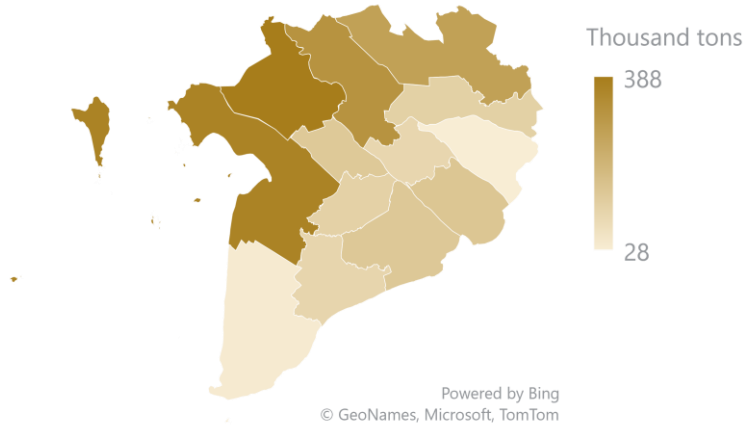
Rice seasons in the Mekong Delta (2019)



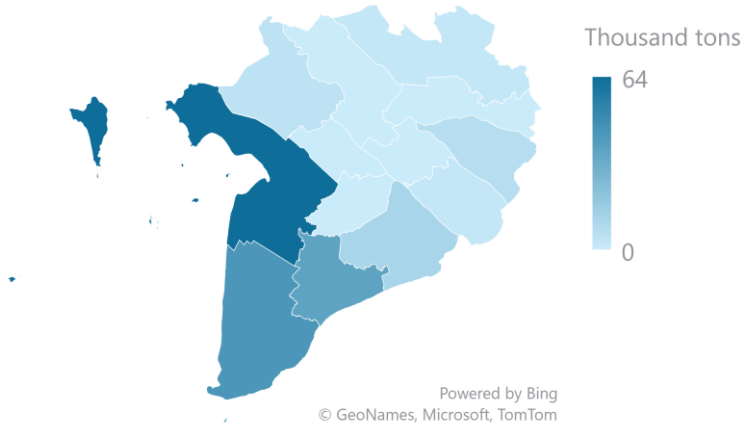
Spring paddy production



Autumn paddy production



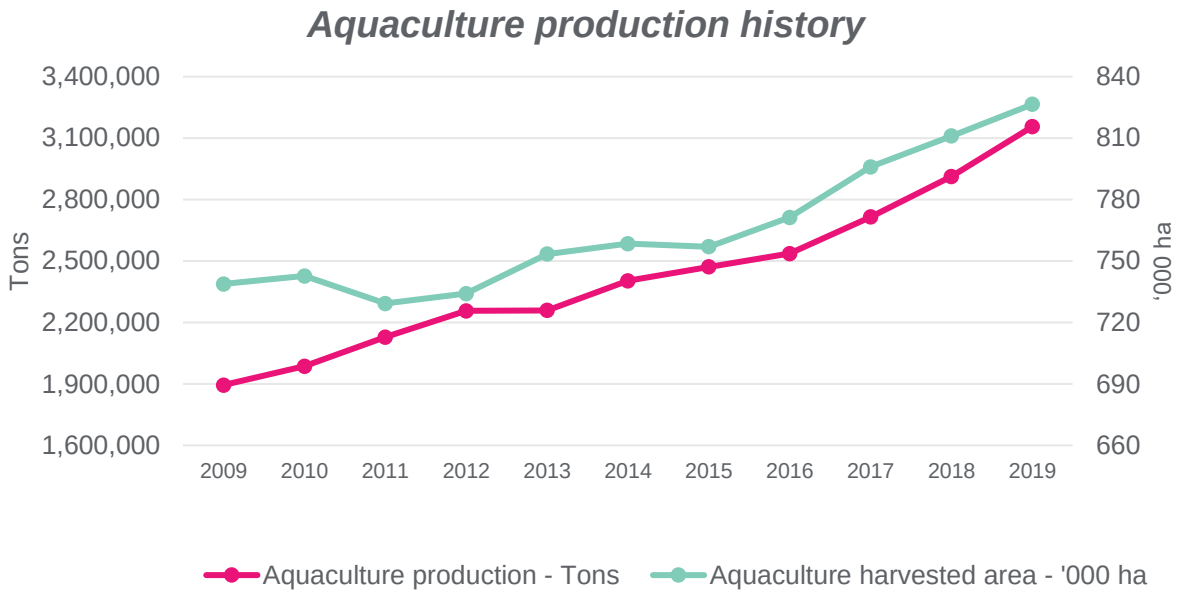
Winter paddy production



Sources: GSO 2019; IPSARD 2020

Aquaculture production

- **Aquaculture booming past 10 years**
  - 2/3 of total fishery outputs from MD comes from aquaculture.
  - Pangasius and Shrimp production are the key commodities of the sector.
  - Aquaculture industry in the MD is maturing and consolidating.
  - The Mekong Delta is one of the world's top exporters of seafood.

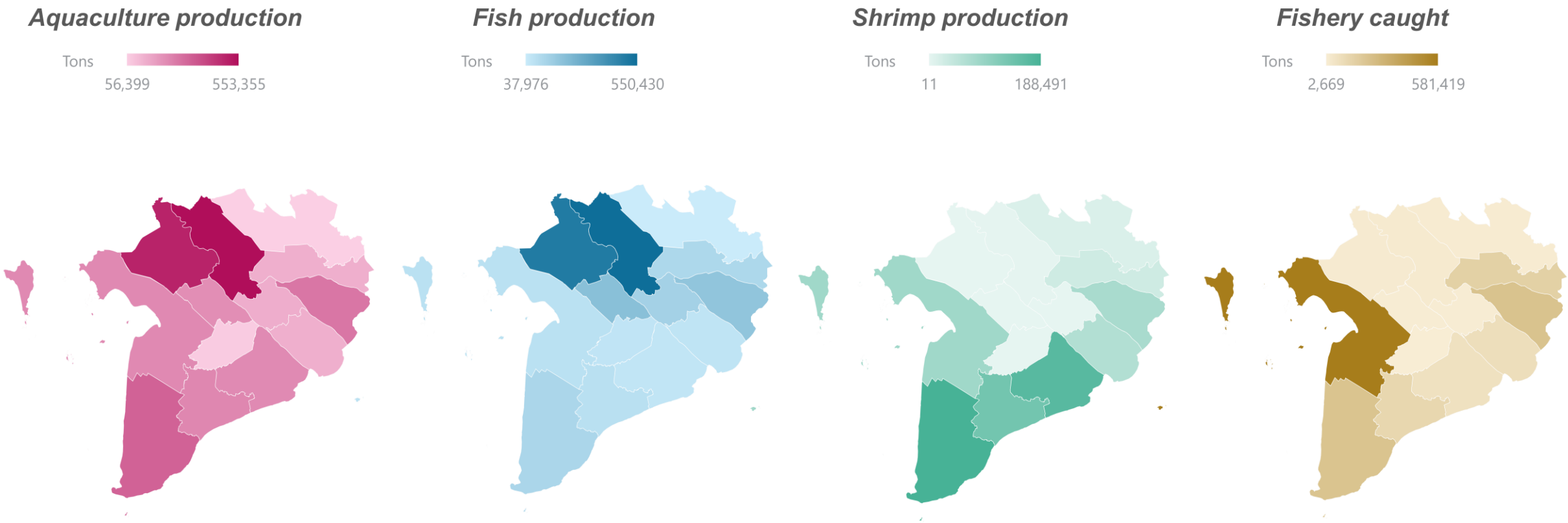


Source: GSO (2019), IPSARD (2020)

- **Upper delta dedicated to freshwater aquaculture**
  - Various species such as catfish, snakehead fish, giant freshwater prawn, etc.
  - Catfish production in the Upper Delta in An Giang and Dong Thap accounts for **80% of the production of the delta**. Flood-based aquaculture during the flood season have been developed during the past 10 years in areas outside high dikes.

- **Costal zone dedicated to Brackish water aquaculture**
  - 90% of total delta is for shrimp production
  - Only 10% of shrimp farming is intensive or super-intensive
  - Encouragement to other farming models (forest-shrimp model, mollusk culture)

Aquaculture vs. Capture fishery



Dong Thap & An Giang = Key provinces for inland fish aquaculture

Coastal zone (incl. Ca Mau, Bac Lieu, Soc trang) = Key area for shrimp production

The Mekong Delta is also Vietnam's most important fishing region.

Kien Giang coasts supplies most of MD fishery caught products.

Source: GSO (2019)

Fruit production

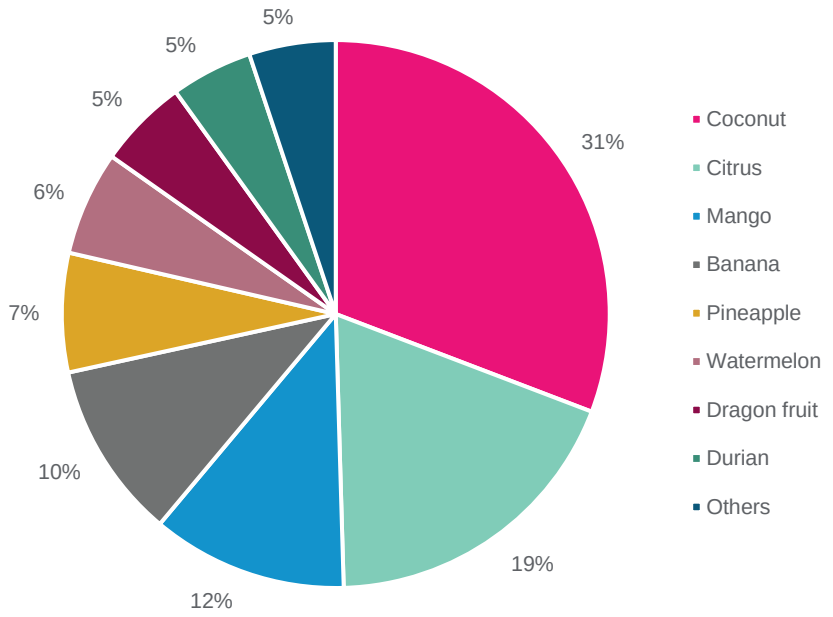
Production:

- **Nearly 40% of Vietnam's fruit production**: More than 300,000 ha of fruit tree plantation area producing ~4 million tons of fruits per year.
- The **Middle delta** is the largest **specialized fruit production area of the Mekong Delta.**
- Coconut plantation covers the largest fruit's area of the Mekong Delta (~31%) (Ben Tre)
- **Intercropping with multiple types of fruit trees still prevails in the region** → to improve land use efficiency and income.

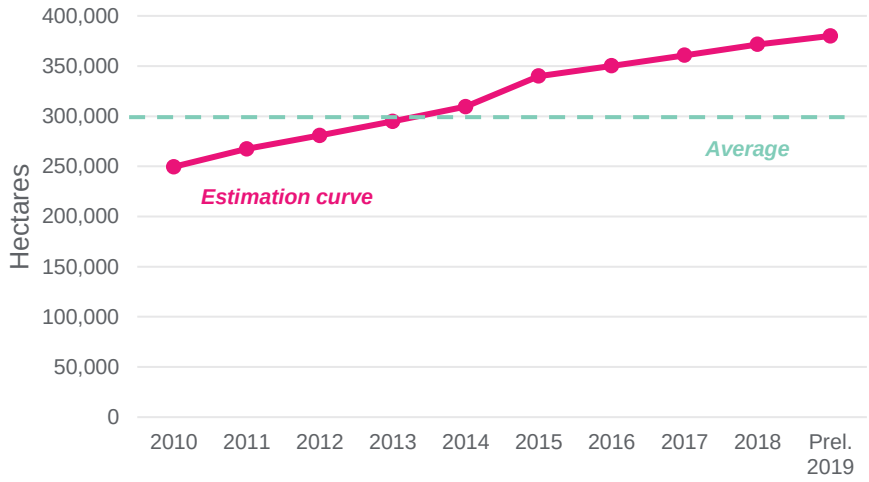
History & trends: *(No official data available on fruit plantation area in the MD !)*

- **Since 2010**: booming of fruit tree production in the Mekong Delta to diversify the region economy. Although a slight increase, the fruit planted area in the region keeps stable around ~300,000 ha over time. Although Rice is still a key export, higher-value fruit products are increasing to respond to the higher domestic and international demand.
- **Future trends**: a projection for fruit production reaching **650,000 ha by 2030.**

Share of total fruit planted area in MD



Fruit plantation area in the MD since 2010 (based on estimation)



Sources: GSO communication 2018; Saigon online news 2020; IPSARD 2020

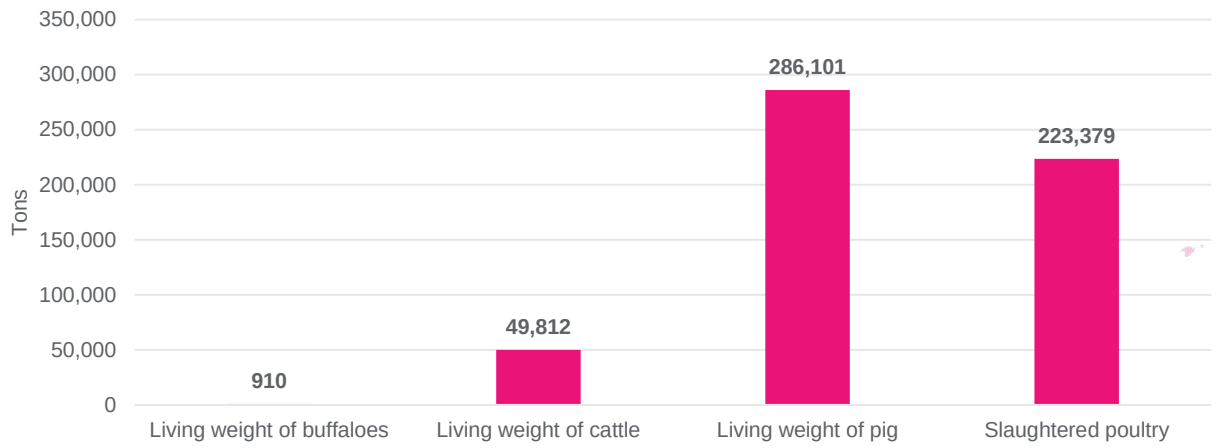
Livestock production

- **Meat accounts for 90% of animal-based food consumed in Vietnam** and is the main livestock primary production (>5 million tons in 2018), followed by Milk (963,000 tons) and Eggs (582,000 tons).
- **Poultry and Pigs are the key livestock commodities** of Vietnam and the Mekong Delta.
- Tien Giang and Vinh Long provinces are where the livestock density is the highest

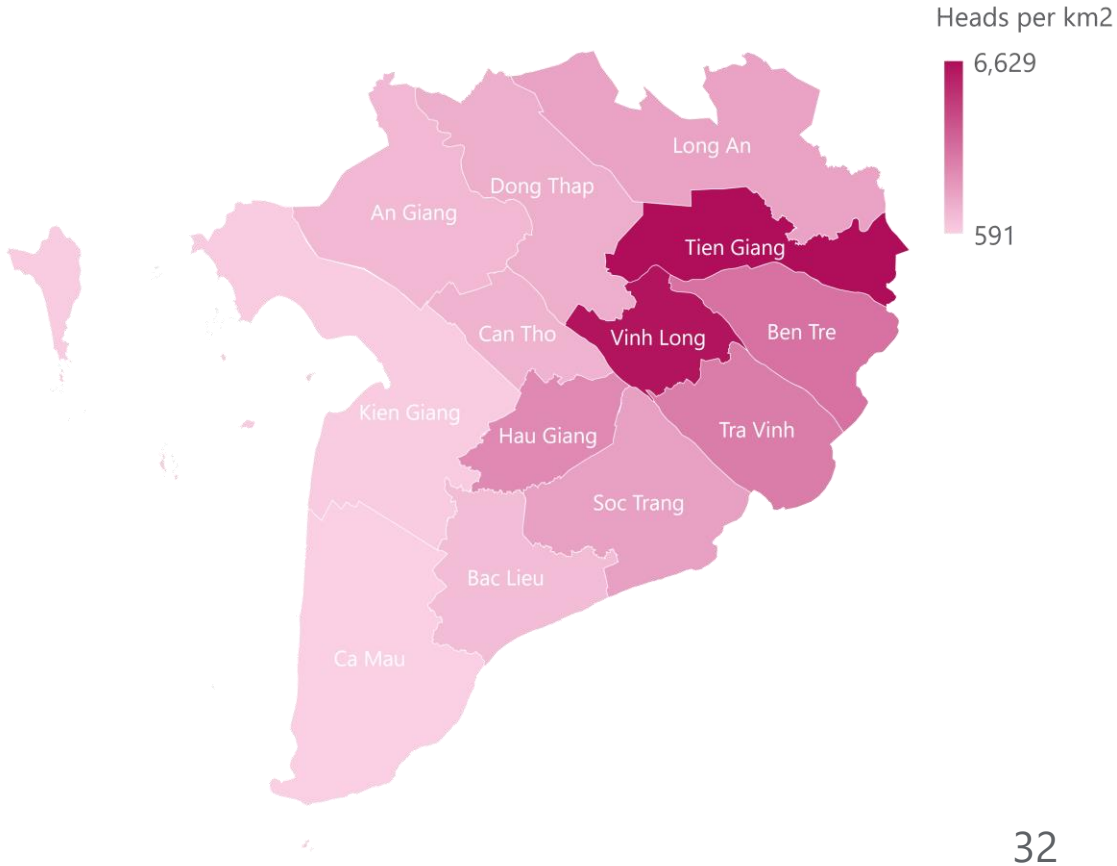
Livestock population in Mekong Delta in 2019

(Number of heads)	Buffalo	Cattle	Pig	Poultry
Whole country	2,388,000	6,060,000	19,616,000	481,079,000
Mekong Delta	23,000	850,000	1,686,000	82,505,000
	(1%)	(14%)	(9%)	(17%)

Estimated livestock production in the Mekong Delta (2019)



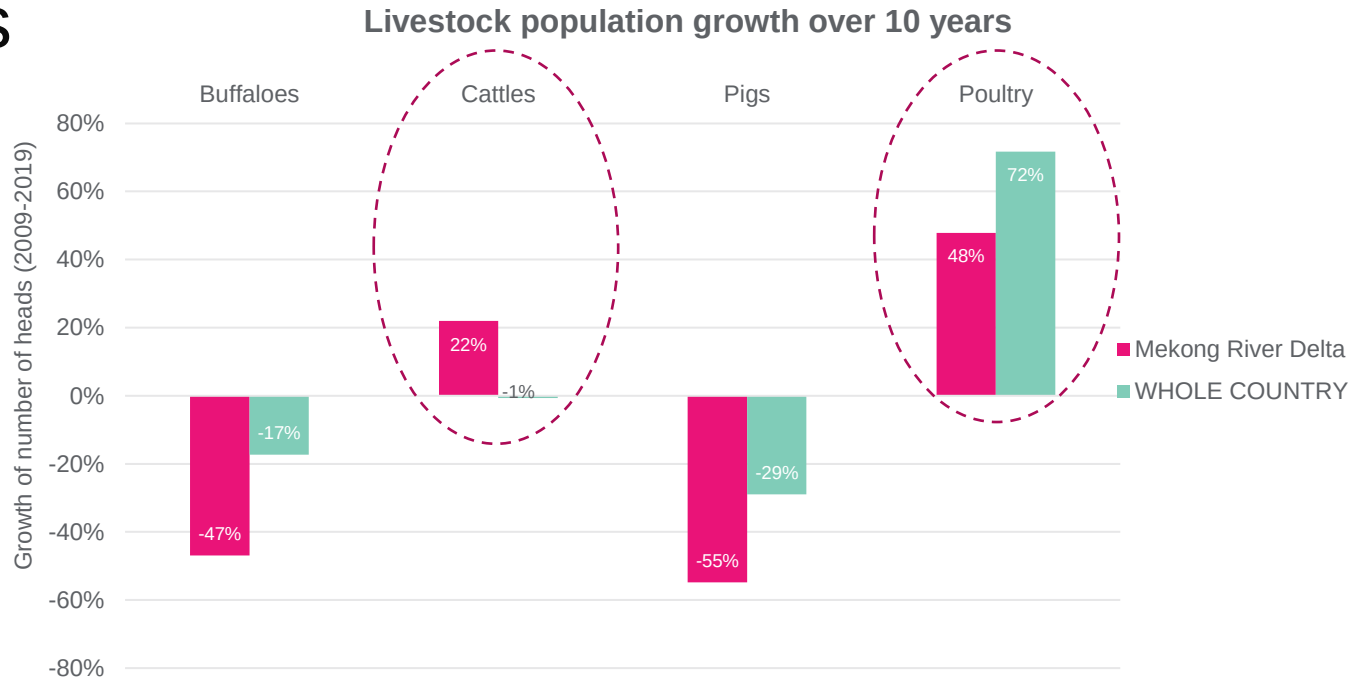
Livestock density in the MD (heads per km2)



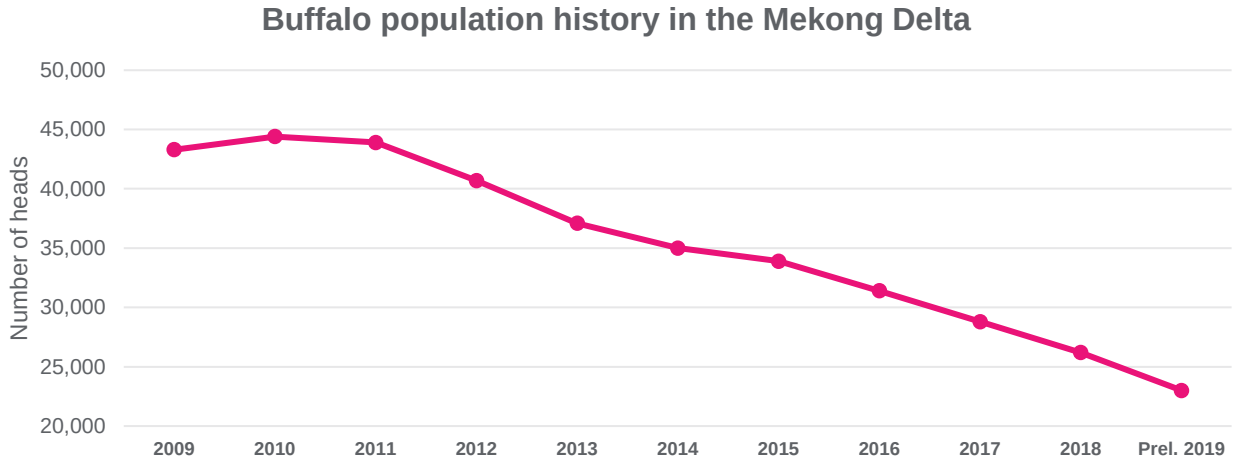
Source: FAOSTAT (2018), IPSARD & CIRAD (2019), GSO (2019)

Livestock population trends

- Since 2009, livestock population has changed nationwide as well as in the Mekong Delta.
  - Buffaloes and Pigs population decreased considerably these 10 past years
  - Poultry's number of heads increased significantly.
  - In the Mekong Delta, Cattle population grows of +22% since 2009.



- **Buffalo herd:**
  - Nationwide, the buffalo production decreased progressively since 2009, due to mechanization of rice farming and competing meat import from India.
  - In the Mekong Delta, the population decreased from 43,000 heads in 2009 to 23,000 heads in 2019.

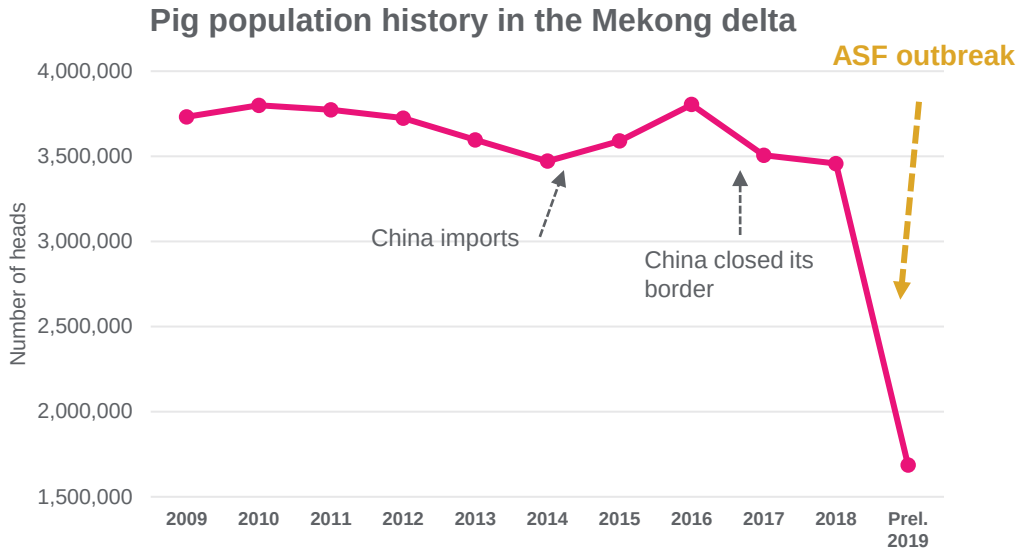


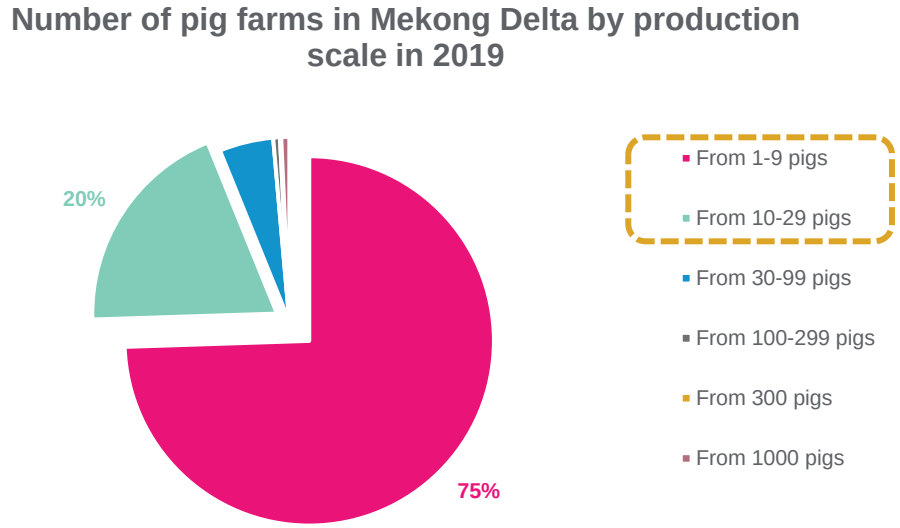
Source: GSO (2019)

Pig herd trends

- **Before 2017, the pig herd was stable at ~3.7 million heads in the Mekong Delta**
  - Pig farming is being industrialized leading to higher production of meat
  - 2014-2016: high demand from China to import Vietnamese pork
  - 2017: pig herd decreased after China closed its border occurring a big crisis of the Vietnam pig sector

- **In 2019, the outbreak of Asian Swine Fever (ASF) has destroyed 22% of total national swine production**
  - Slowed down breeding pigs in some Mekong Delta provinces
  - From January to September 2020, Vietnam culled over 43,000 pigs to curb ASF in Northern Vietnam, mostly in small-scale farms.
  - Small-scale farms → suffer more from ASF than large-scale farming operations, due to inability to implement proper biosecurity measures.
  - In 2019, the Mekong Delta still holds largely small-scale pig farming households (75% with 1-9 pigs)





Source: Vietnam New Agency (2019), IPSARD & CIRAD (2019), GSO (2019)

Poultry & Cattle herd trends

Poultry flock

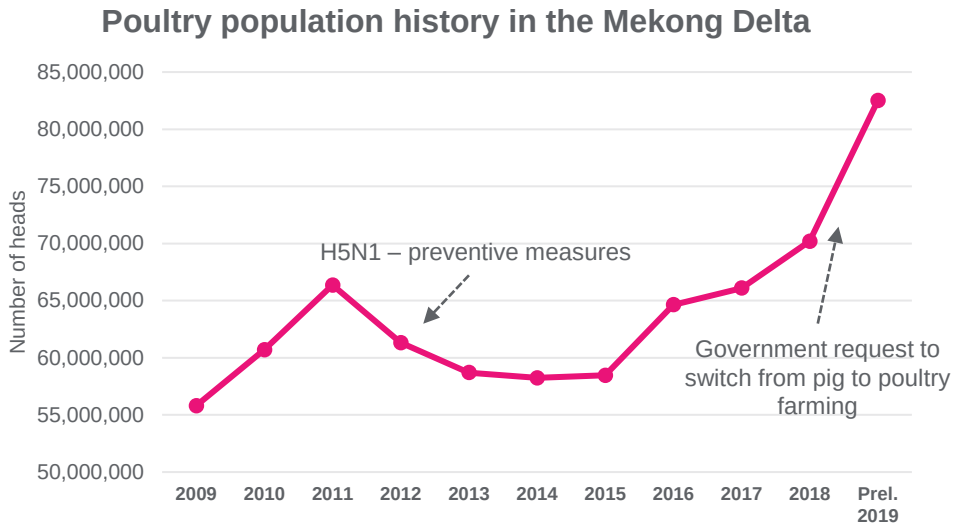
- Poultry population in the Mekong Delta increased these 10 past years
  - 82 million heads in 2019, while it was of 56 million in 2009.
  - The Mekong Delta is ranked second in the poultry production and herd (after Red River Delta).
- 2011-2013, poultry production decreased in the Mekong Delta due to the decline of flock under the effect of preventive culling regarding H5N1.
- Since 2015, poultry population in the Mekong Delta is following a significant growth.

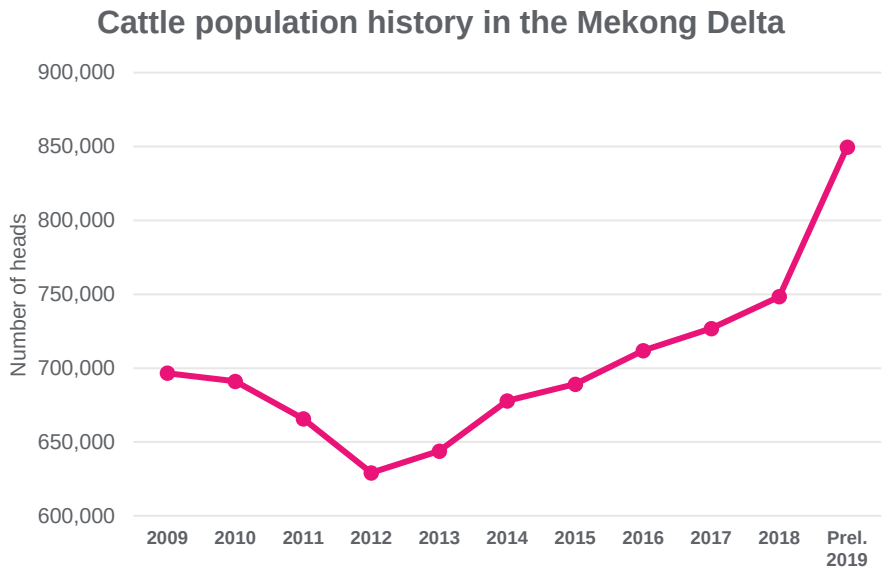
Cattle herd

- Cattle population in the Mekong Delta increased since 2012.
- Cattles production is encouraged in the Mekong Delta\
- Using large volumes of locally available agricultural by-products and beef prices are high.
- There are several projects to breed cattle for meat, milk and calves in Long An, Soc Trang and Tien Giang.

Restructuration of the livestock sector in the region

- Will focus more on poultry and cattle production to maintain growth rate after the outbreak of ASF.

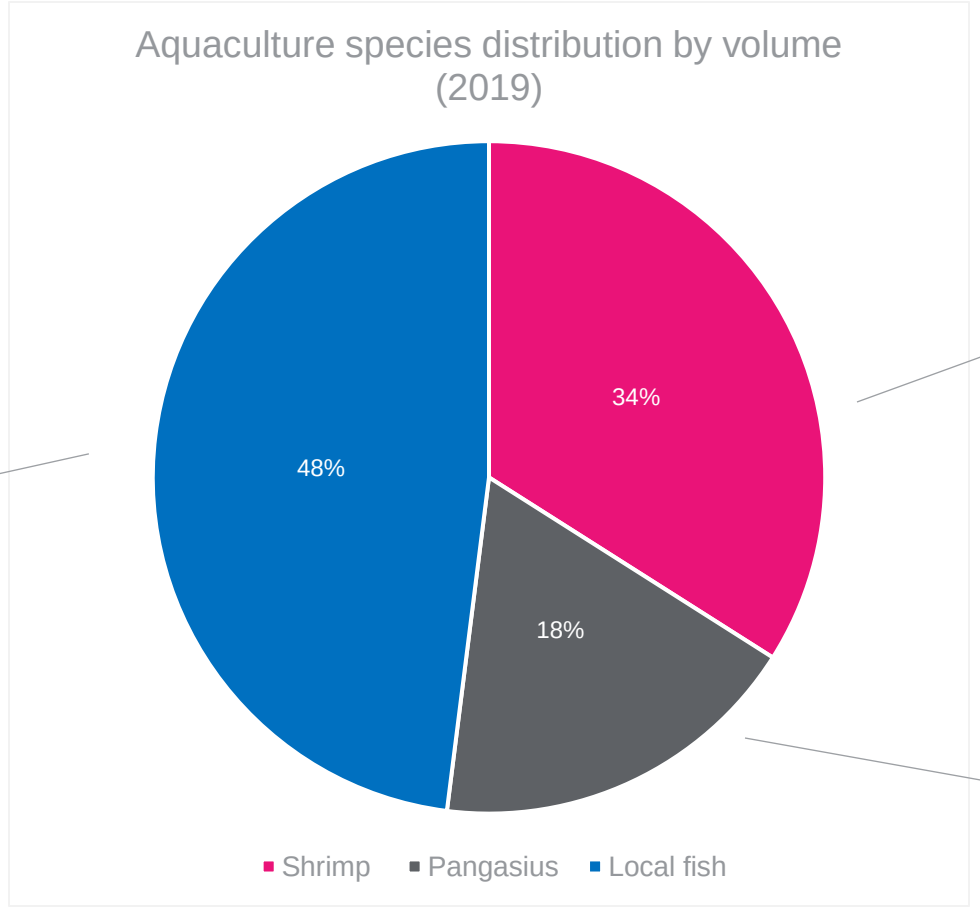




Source: USDA (2019), IPSARD & CIRAD (2019), GSO (2019)

5. THE CASE OF SHRIMP FARMING

Overview aquaculture production

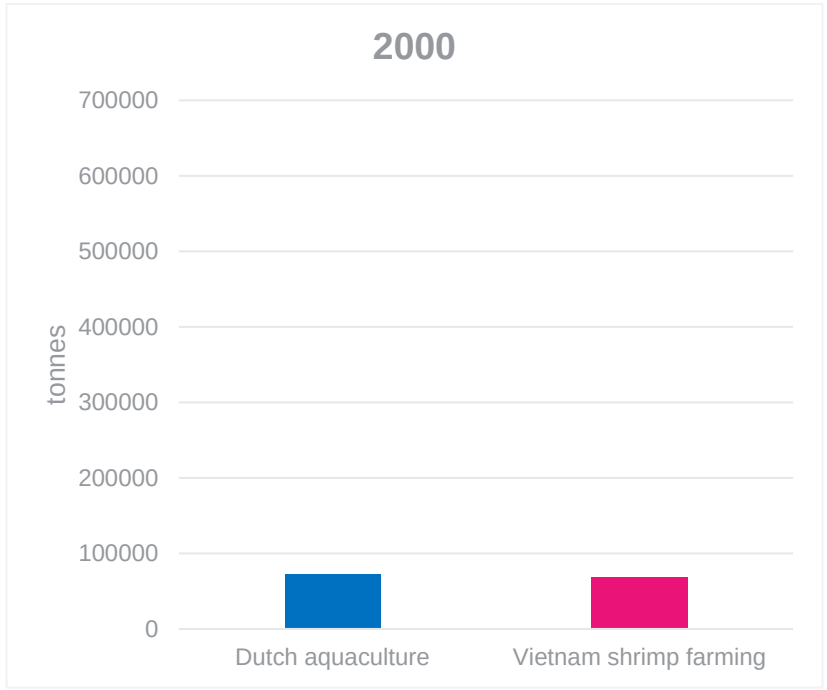


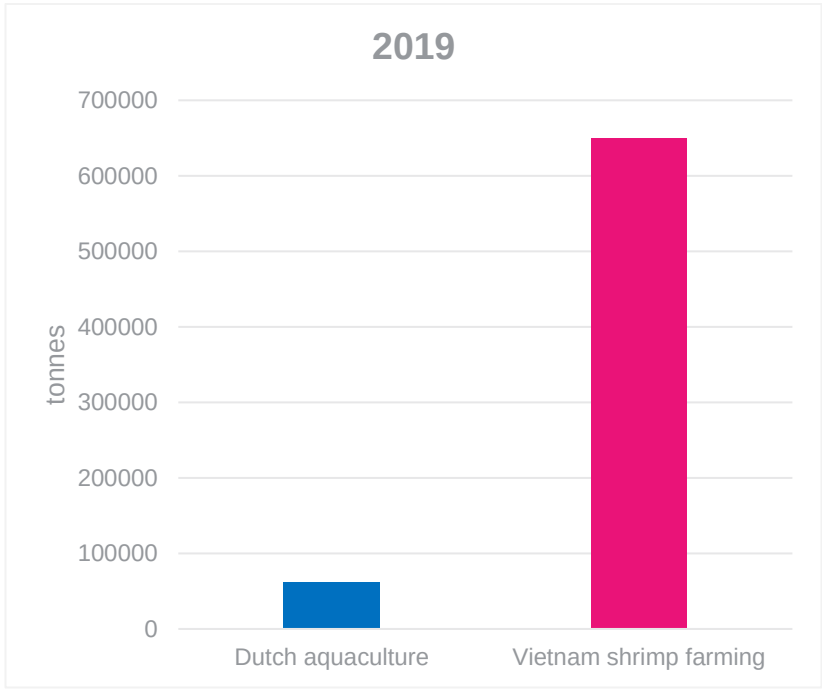
4th globally

VN supply: 25 kg/capita
NL supply: 3 kg/capita

1st globally

Development of shrimp production



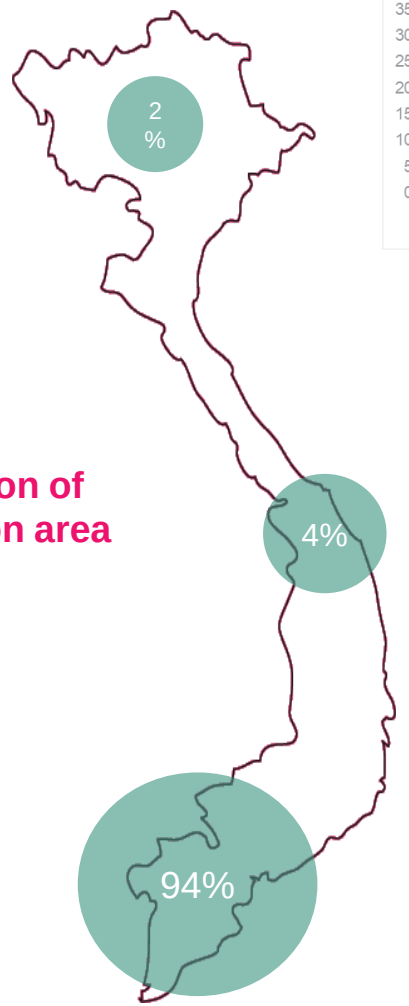


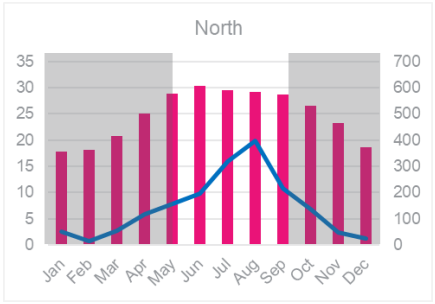
In just 20 years, shrimp production in Vietnam from almost nothing to

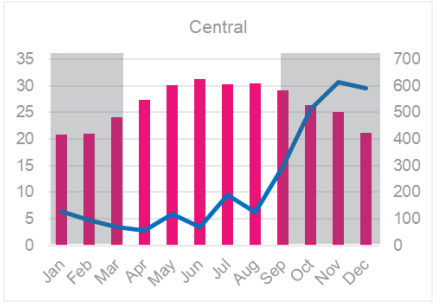
- 600,000 ha of farms, 500 factories
- Generating GDP of USD 3.3 billion per year
- Employing nearly 1 million people in rural areas
- Over a surface area equivalent to the Netherlands

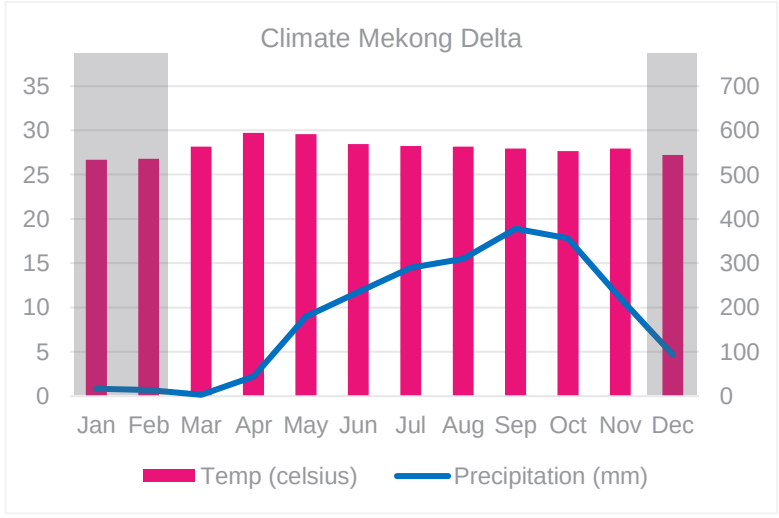
The Mekong Delta: main agro-ecological zone for shrimps

Distribution of production area









- Stable climate
- Allowing farmers to produce 1 crop in 100 days
- And up to 3-4 crops per year (whiteleg shrimp)

Intensification of shrimp farming

Extensive mangrove shrimp farming
0.25-0.5 tonnes/ha/year

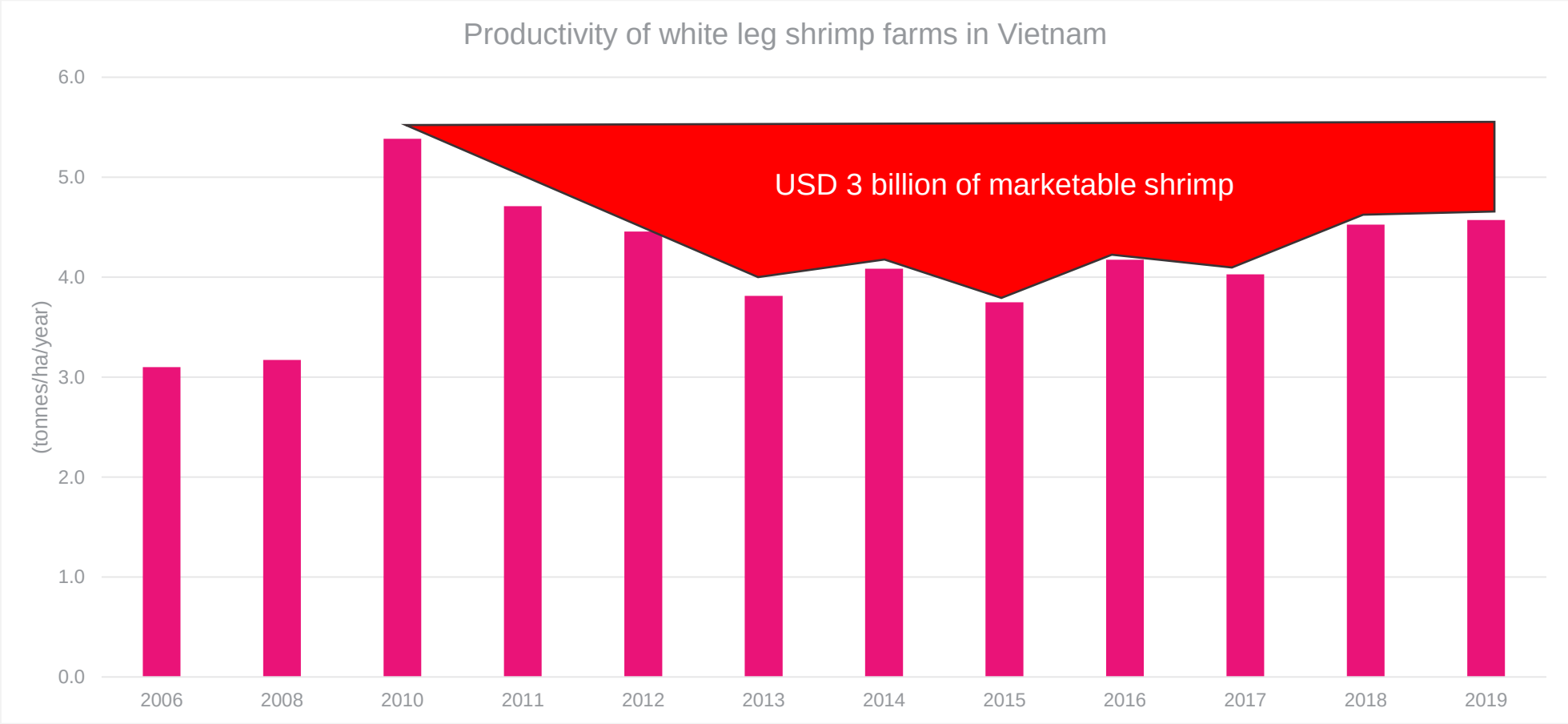
Intensification

Intensive shrimp farming
6-150 tonnes/ha/year

Emergence of diseases

Source: Compiled by Fresh Studio from DOF data

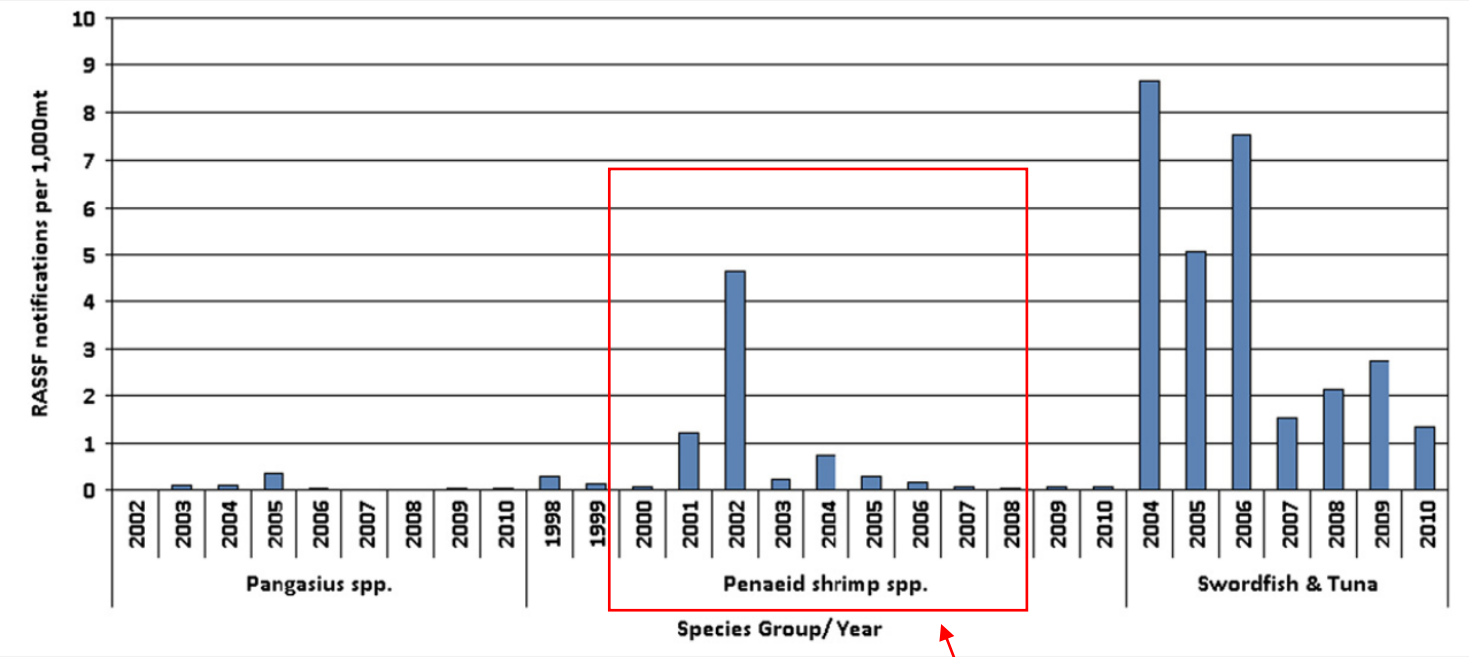
Cost of diseases – for farmers



Source: Compiled by Fresh Studio from DOF data

Cost of disease – for Vietnam

RASSF notifications per 1000 Mt of pangasius and other seafood groups imported from Vietnam to the EU-27 group of countries



Pathogenic micro-organisms
& veterinary products

Vietnam's antibiotic use threatens shrimp exports

Higher prices due to the cost of increased inspections is making the country's shrimp exports less competitive, says VASEP.

Transition from Black tiger to Whiteleg shrimp

Black tiger shrimp (Penaeus monodon)

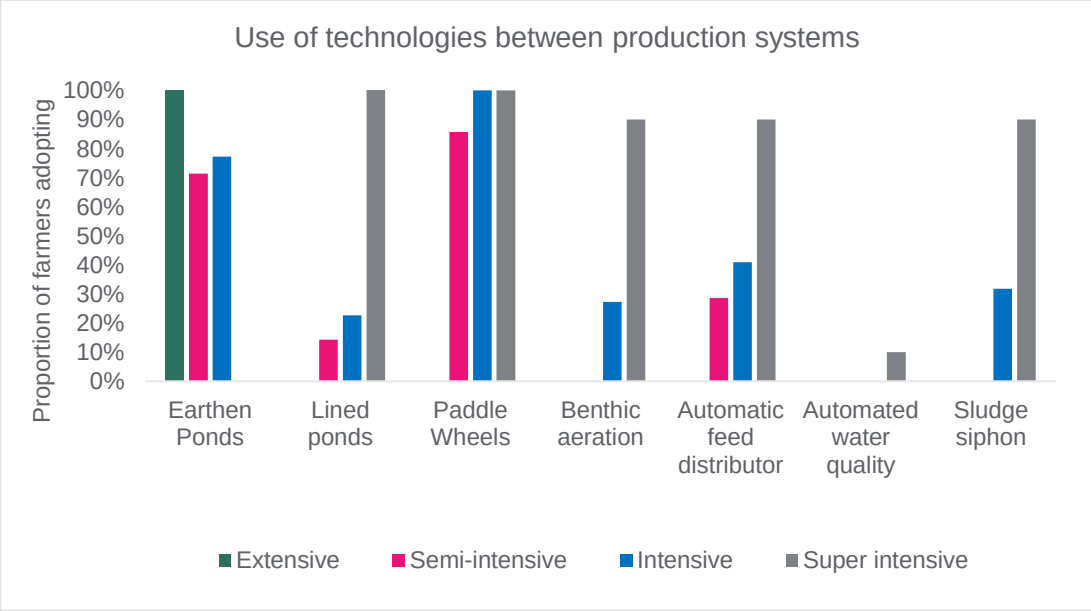
- Used to be the main farmed species
- Traditionally captured
- Very good market attributes: large (50-60 g.), good looking and tasty.
- But poorly adapted to farming, cannot be produced at high densities, high feed conversion ratios (1.6), sensible to diseases and low salinities.
- Now sold as a premium and high-end product.

Whiteleg shrimp (Litopenaeus vannamei)

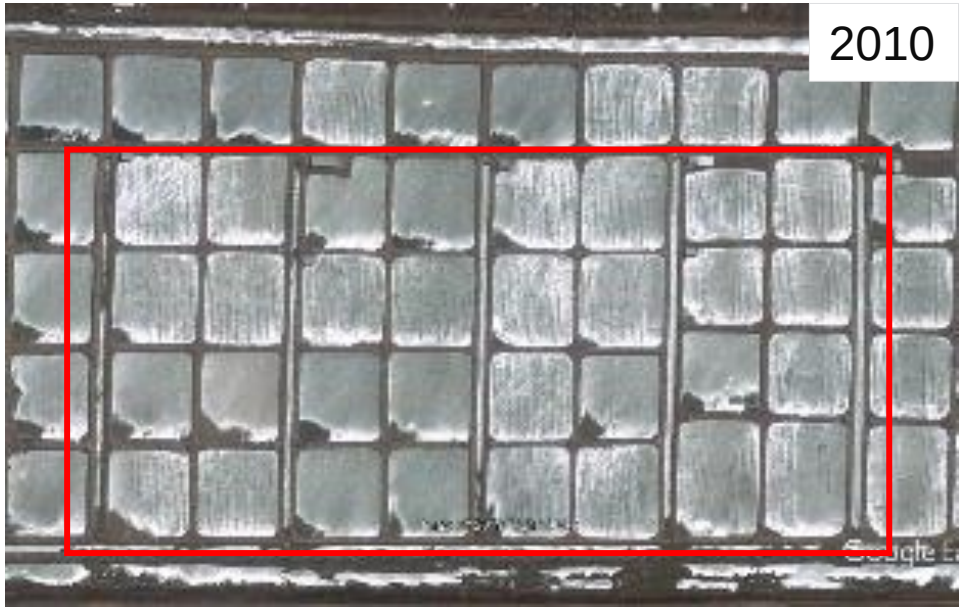
- Has emerged as the dominant farmed species in the past 15 years.
- Selected for its good production attributes: it can be farmed at high densities, is less sensitive to diseases, convert feed better and can be farmed in salinities.
- Its markets attributes are however weaker: pale color, smaller size (25-35 g.).
- It has hence largely participated in commoditizing the shrimp market.

Farmer led innovations

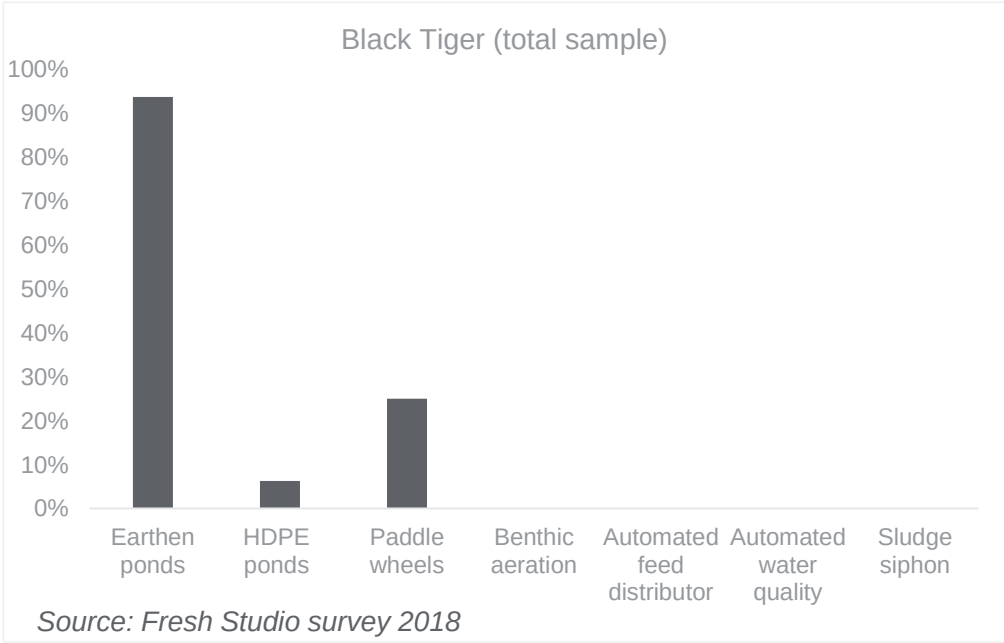
- In response to outbreaks, farmers developed major innovations in farm design and production strategies to counteract diseases.
- Major trends:
  - dedicate more area to “passive” water treatment using reservoir ponds to prepare the condition the incoming water.
  - intensify production on a smaller area of their farm, where oxygen addition and sludge removal is applied to preserve good ecosystem.



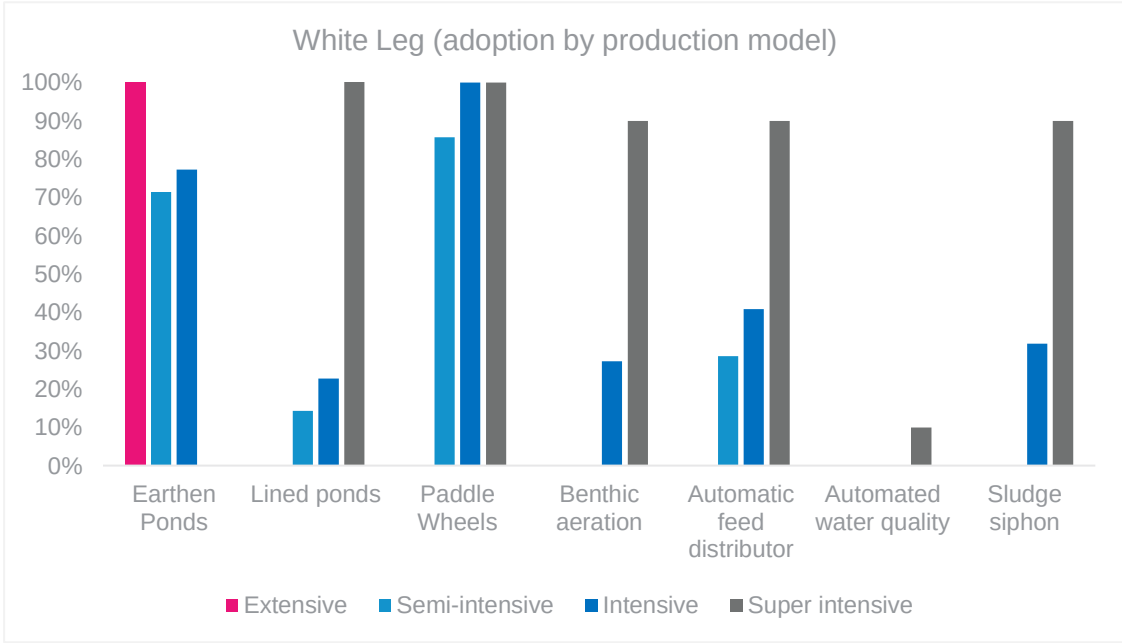
A whiteleg shrimp farm in Soc Trang, illustrating these trends

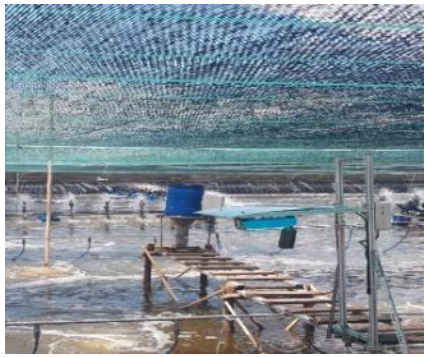


Transition of technologies



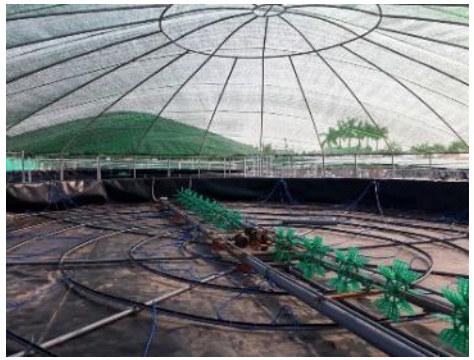
Source: Fresh Studio survey 2018





Pond covering

Paddle wheels

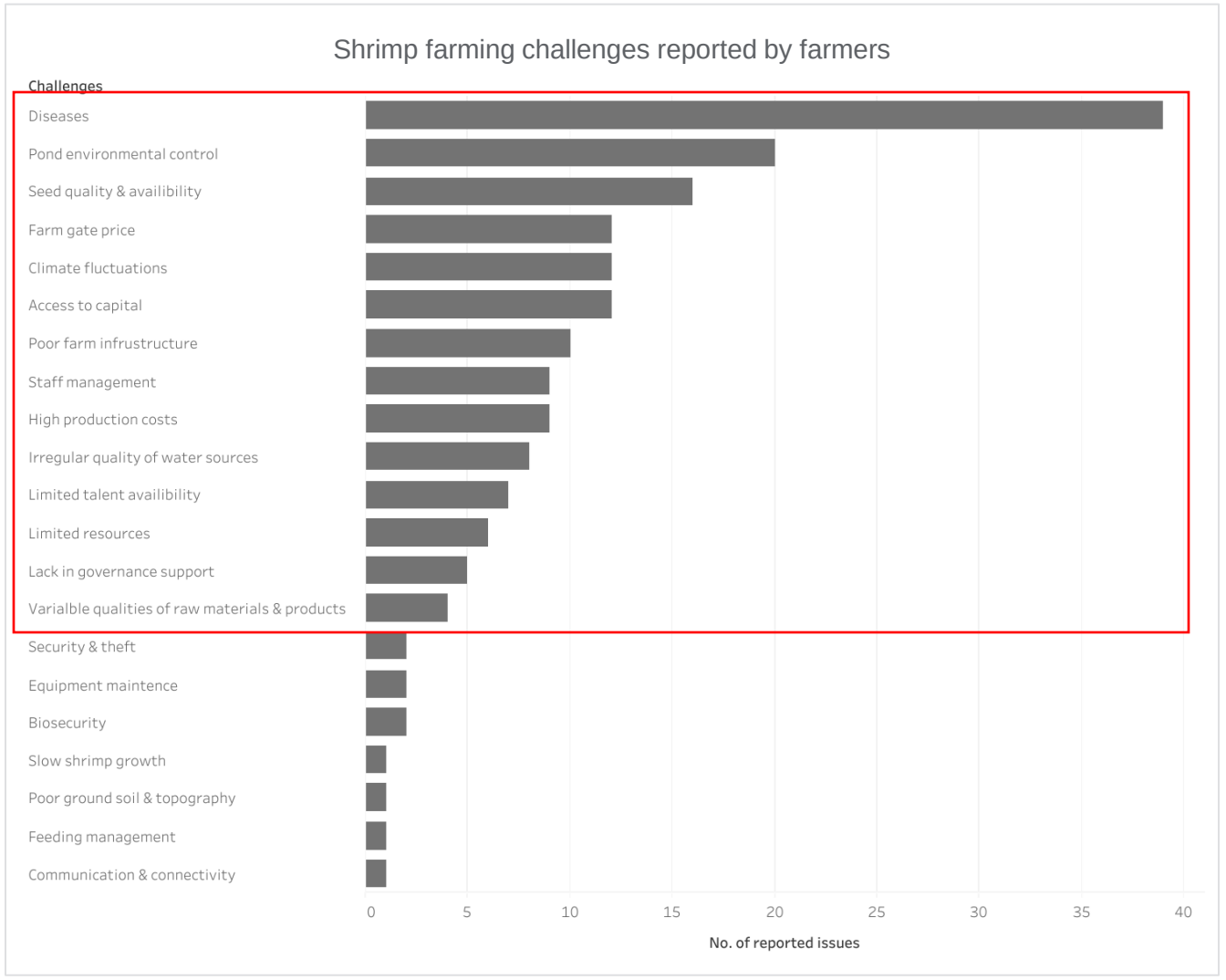


Benthic aeration

Sludge syphon

Automated feeder

Still a lot to be done

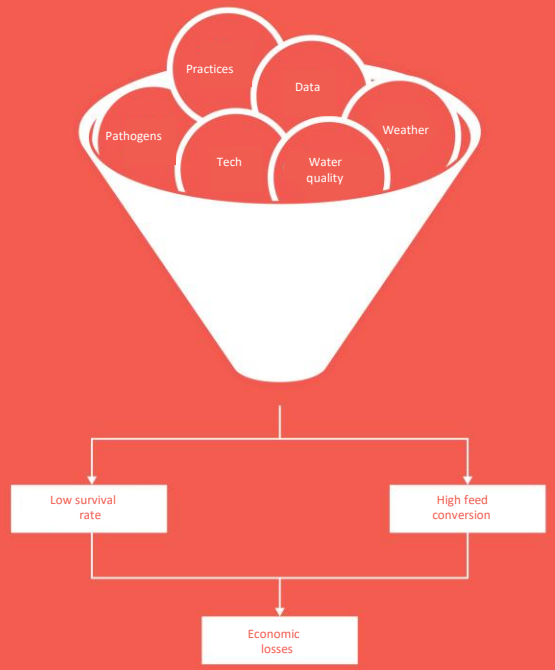


Source: Fresh Studio survey 2018

Example of applied R&D innovation for aquaculture

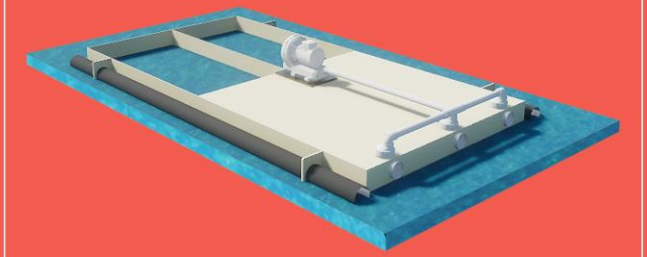
1 CURRENT STATUS

TRADITIONAL POND SYSTEMS



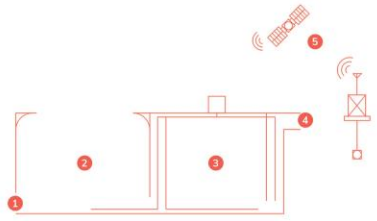
2 OUR SOLUTION

LOW COST POND CLEANING DEVICE
to support farmers reduce FCR
& improve survival through greater control and monitoring of water quality



HOW DOES IT WORK?

1. Inlet
2. Biological filter
3. Oxygen chamber
4. Outlet
5. Real-time monitoring



3 PRELIMINARY RESULTS

Reduce FCR
8%

Increase survival to
82%

Cut water consumption by
5.5

Reduce production cost by
12%

4 NEXT STEPS WITH YOU?

- 1/2019- 1/2020 — Test prototype
- 2/2020 — Demonstrate performances to farmers
- 7/2020 — Organise training course to prepare pilot
- Run a commercial pilot with farmers
- Upscale technology

Fresh Academy

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6. Business opportunities in the Mekong Delta

Inputs: for all sectors the same issues

- Vietnamese farmers use too much of all inputs
  - Too much and unbalanced fertilizers
  - Too much pesticides, non rational use
  - Too much water
  - Too much feed
  - Too much antibiotics
  - Lack of good genetics
- Most input companies: purely sales driven
- Farmers think they get good advice for free

Nursery in Vietnam

Nursery in South Africa

Inputs and technology business opportunity

Develop a long-lasting sustainable business model

- Take the Vietnamese farmer serious: a big potential market
- Undertake applied R&D
- Be sure what value added your inputs/technologies have for Vietnamese farmers
- Train your staff
- Focus on providing the farmers the best advise
- Demo-farms
- Link farmers to the chain
- Dutch companies who did this successfully: East West Seeds, De Heus, Bejo, Nutreco/Skretting, Rijk Zwaan etc.

Business opportunities along the chain

	Inputs	Production	Processing/ Distribution/Logistics
Aquaculture	**Feed ingredients** • More local/less global. • Alternatives to IUU fishmeal. • More functional, to e.g. prevent diseases. **Chemicals** • Preventive solutions to combat development of antibio-resistance (e.g. probiotics, functional feeds, etc.) • Access aquaculture-certified chemicals with proven efficacy test.	**Hatchery/nurseries** • Need for professional nucleus centres (genetic lines sup.), particularly in fish. **Farms** • More cost-effective farm equipment (aeration devices, pumps, feeders, etc). • Less instinct-based/more data driven farm management (e.g. with low-cost water quality measurements devices, user friendly data platforms, etc.). • Innovative support-service models (technical advisory, diseases diagnosis, access to finance, platforms with freedom to choose suppliers/buyers, etc.) to accompany farmers in their transition.	**Exporters** • Simple tools to convert production monitoring/traceability from paper to digital. • Optimize costs with greater recovery of by-products (e.g. by transforming shrimp heads in functional ingredients). **Importers** • Sourcing services backed with market intelligence.
Fruits & vegetables	**Fertilizers** • Well balanced fruit & vegetable tailored nutrient management programs • Use of local available nutrients: from aquaculture & livestock production • Fertigation • Organic certified fertilizers **Crop protection products** • Organic approved bio pesticides • Register active ingredients specifically for fruits and vegetables • Wide range of IPM based products	**Nurseries** • Genetics: saline resistance rootstocks, wide range of new fruit/vegetable varieties • Need for professional nurseries **Agriculture equipment/Irrigation/Fertigation** • Small tractors, weeding machines, mulchers, pruning tools • Drip irrigation/fertigation **Farms** • Professional fruit/veg orchards: genetics, spacing, pruning • Innovative support-service models (technical advisory, diseases diagnosis, access to finance) to accompany farmers in their transition. • Invest in farming in Asia for Asia	**Technologies** • Cooling/freezing equipment • Sorting/grading machines • Processing lines • Post harvest products • Sustainable packaging: compostable certified **Exporters/Food processing** • Frozen purees, juices of tropical fruits/vegetables • Natural oils **Logistics/services** • Can Tho container terminal • Food processing toll fee service model

6. Questions & Answers

featuring foods