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THIS CHART PACK CONTAINS 15 VISUALIZATIONS

Vietnam's Trade Landscape Is Being Redrawn—Are You Ready?

US tariffs are reshaping global trade – and after a multi-decade export boom, Vietnam is at the heart of the storm. How are ASEAN economies adapting to this new wave of trade disruptions, geopolitical uncertainty and persistent supply-chain stress?

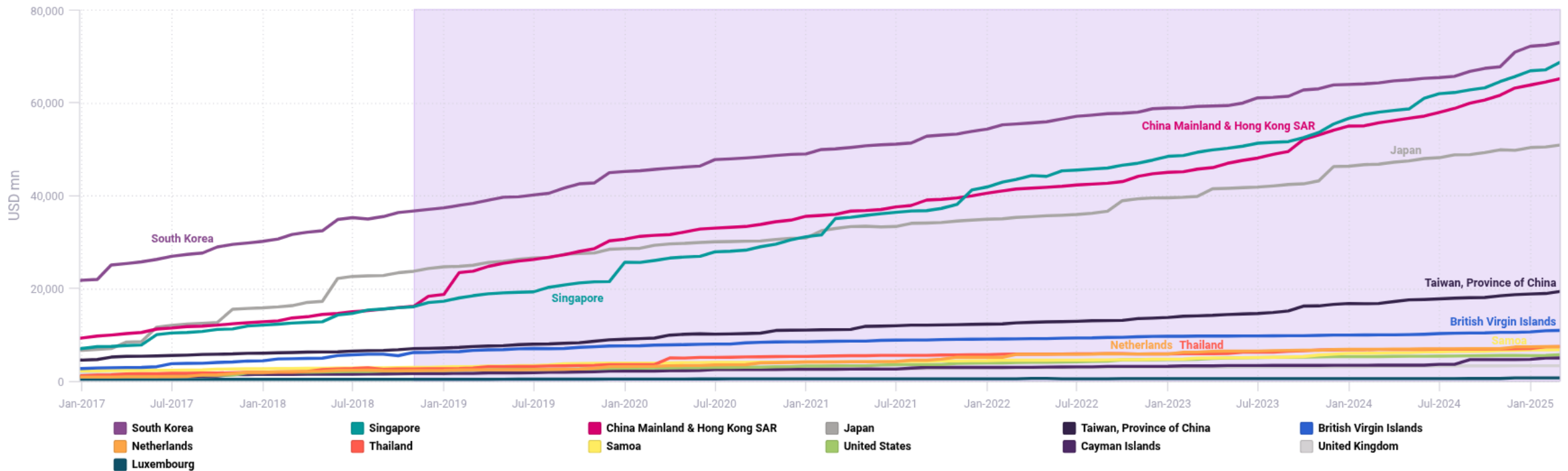
CEIC offers even more granular, locally sourced, hard-to-access data relevant to Vietnam and Asian trade – and is trusted by investment professionals seeking the opportunities and identifying the risks that others miss.



Capital flows: Composition of foreign direct investment in Vietnam has seen long-term change going back to Trump's first term amid international trade tensions

Vietnam: Accumulated FDI from various source economies since 2014

Since late 2018, FDI from Mainland China and Singapore has narrowed South Korea's lead



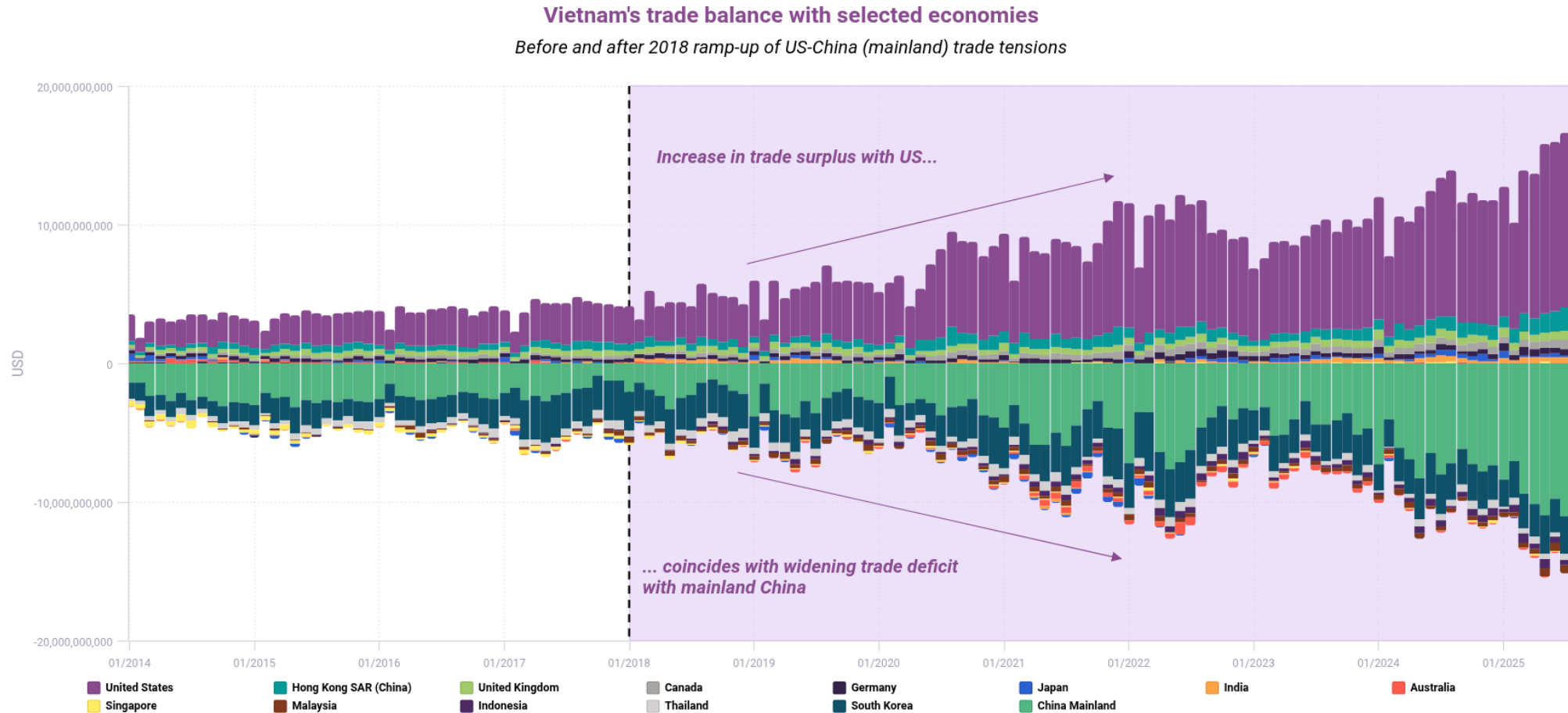
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Vietnam's trade balance shifts after 2018 amid tariffs and global repositioning



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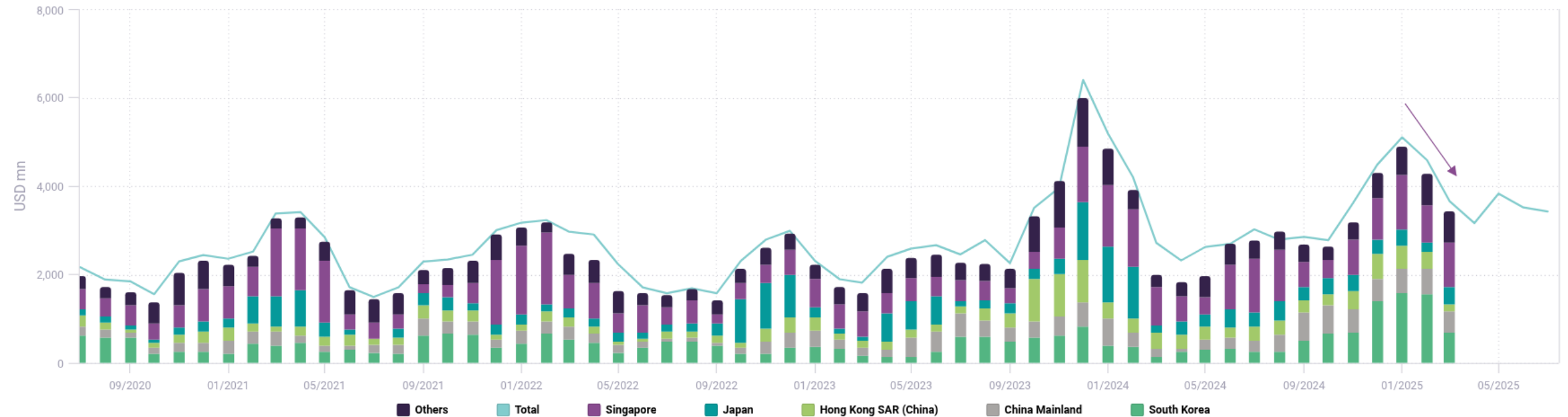
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Vietnam's FDI momentum stalls after Trump's re-election

Vietnamese FDI by source nation: inflows have slowed in 2025

Registered capital; Smoothed



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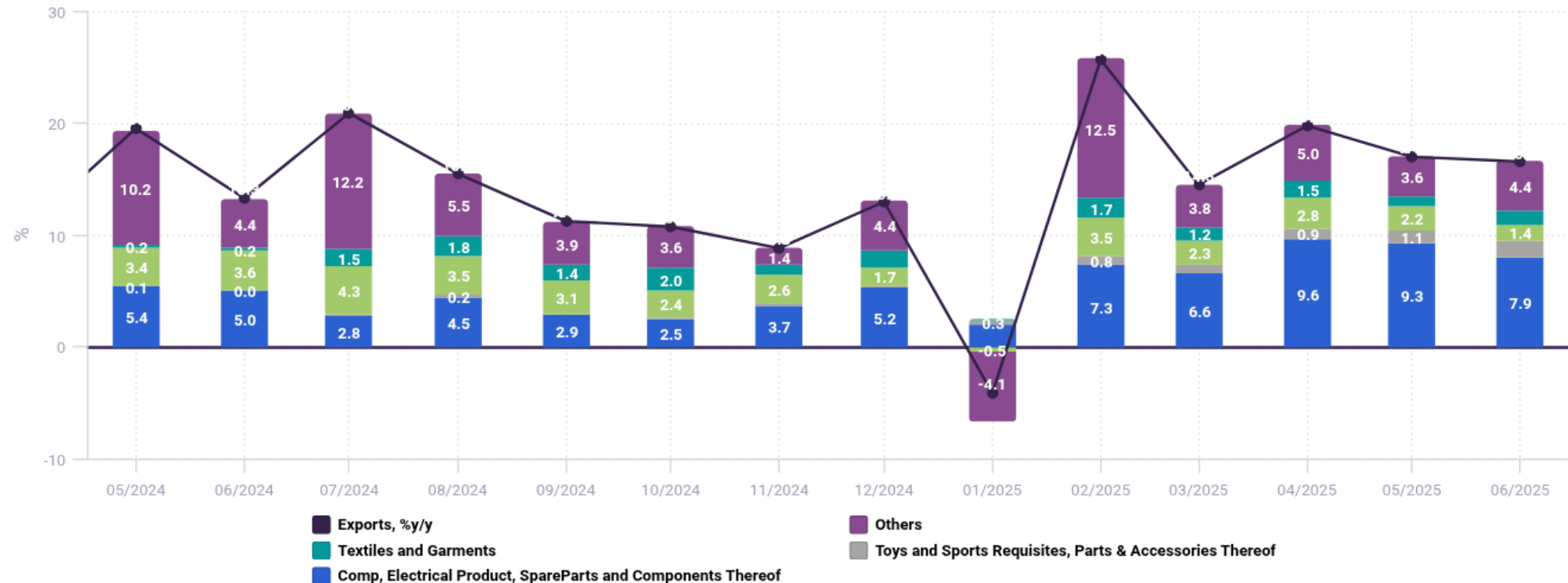
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Contributions to Vietnam's export growth: volatility, but sustained strength in electronic goods

Contributions to Vietnamese exports by sector since mid-2024, %/y

Electronics (except for phones) have been a bright spot



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FDI-led growth: Foreign enterprises drive trade resilience, especially in 2025

Foreign-owned firms increasingly boost Vietnam's exports

yoy % growth rate



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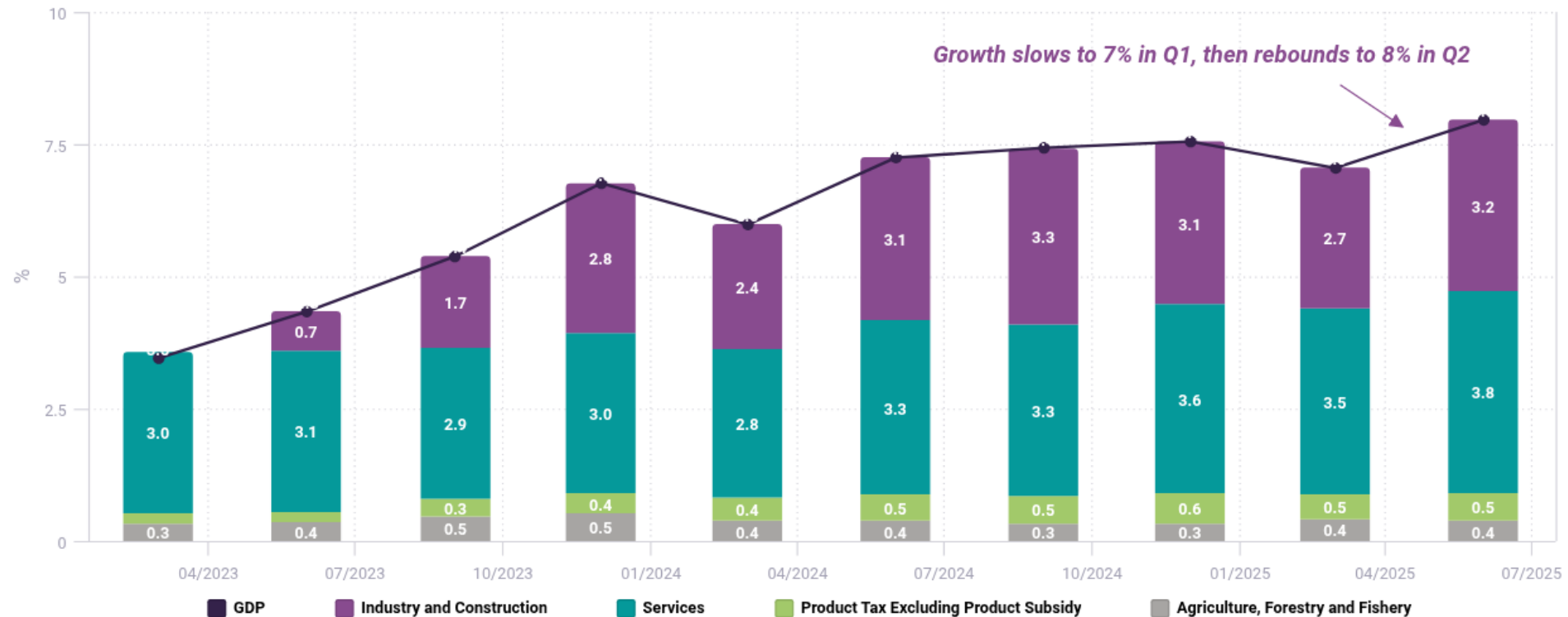
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Will signs of softening resume? Vietnam's GDP growth slowed in early 2025 before rebounding

Vietnamese growth in 2025: services steady, industry & construction wobble

Contributions to Vietnam's GDP by sector, %y/y

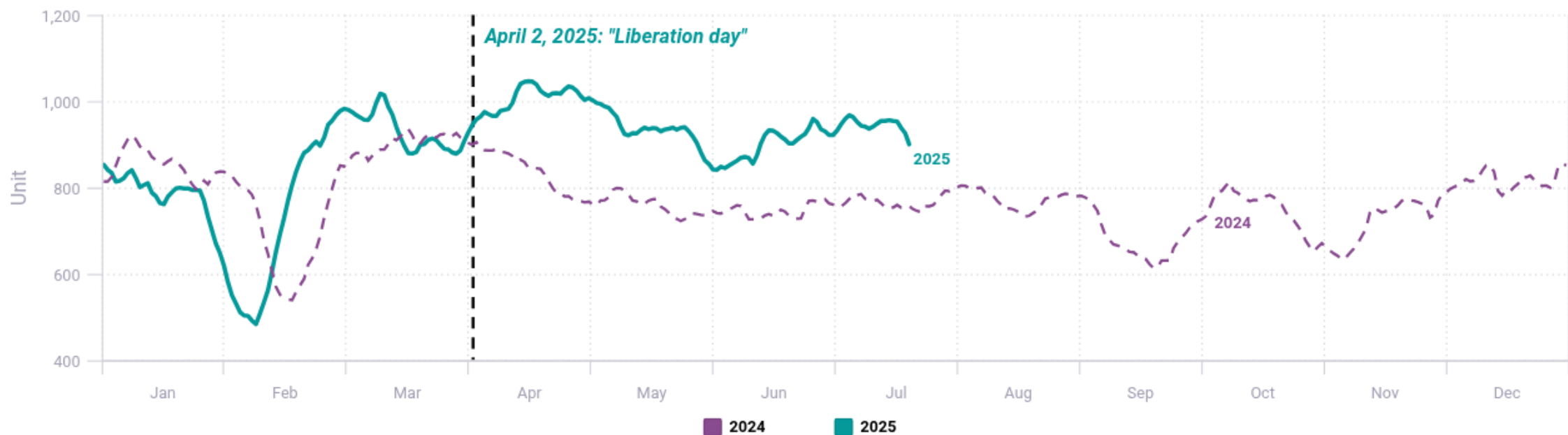


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Activity at Vietnam's ports, 2024 vs. 2025: Trump tariff threats prompt pickup in maritime traffic

Vietnam daily port departures, 2025 vs 2024



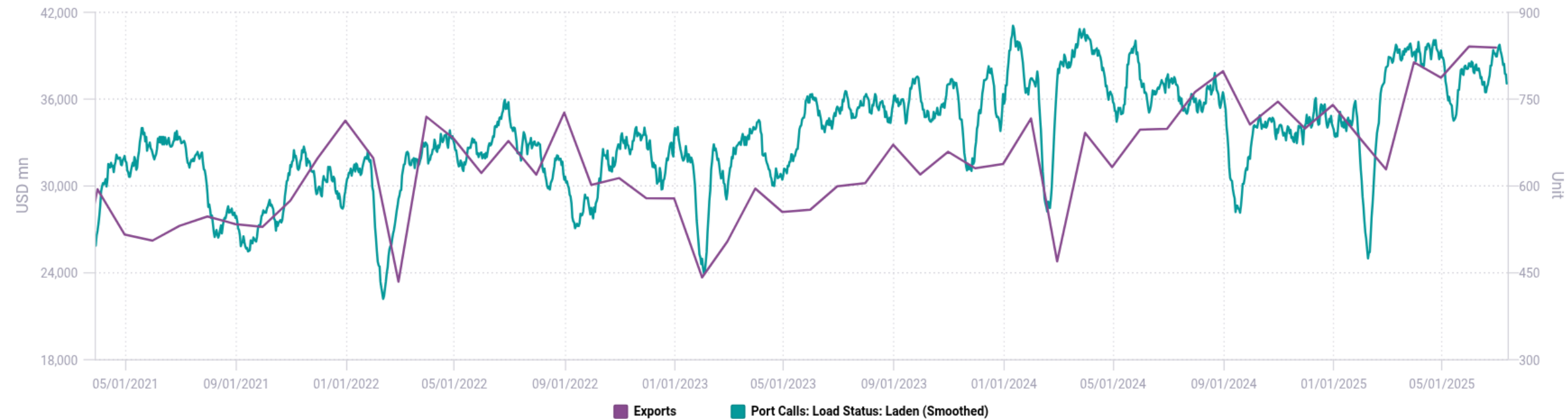
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Shipping signals: what high-frequency port traffic data can reveal about Vietnam's export trends

Vietnamese exports versus vessel traffic at the nation's ports

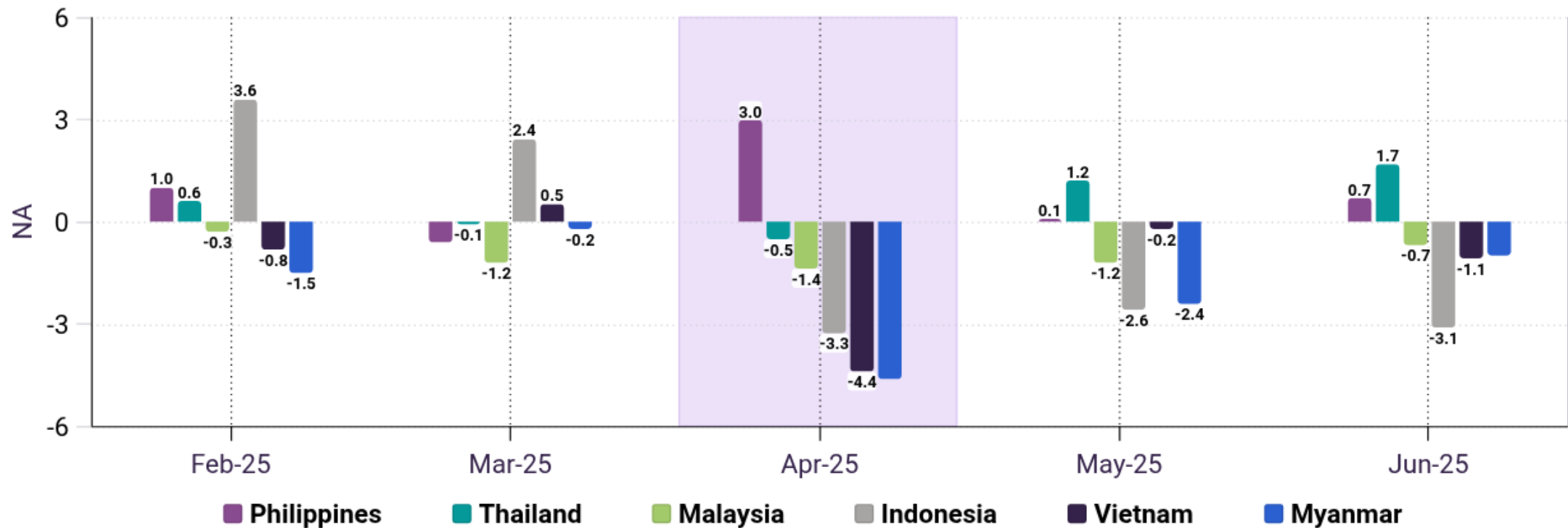


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Cooling or rebounding? Vietnam's purchasing managers' index (PMI) since April "Liberation day" shock reflects trade, supply-chain pressures

S&P PMI index for ASEAN economies



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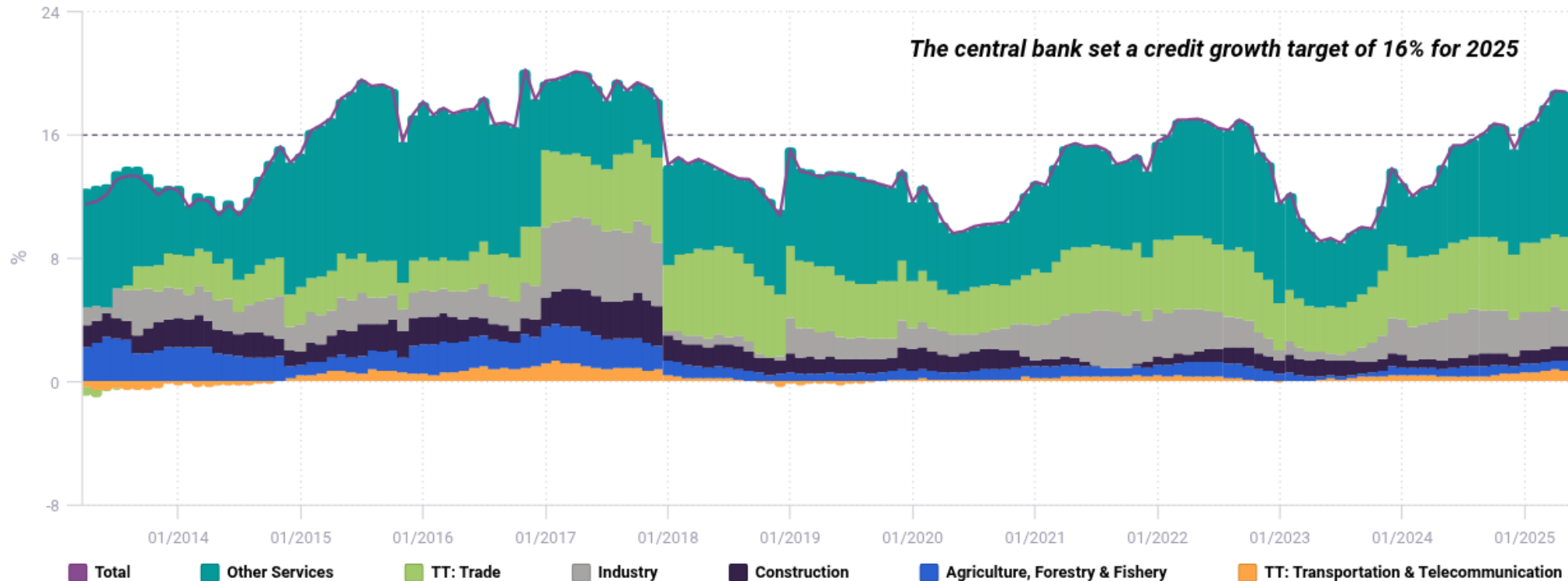
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Sectoral lending trends: mapping credit flows across Vietnam's economy

Vietnamese credit: lending by sector since 2013

Services, trade dominate; construction has shrivelled



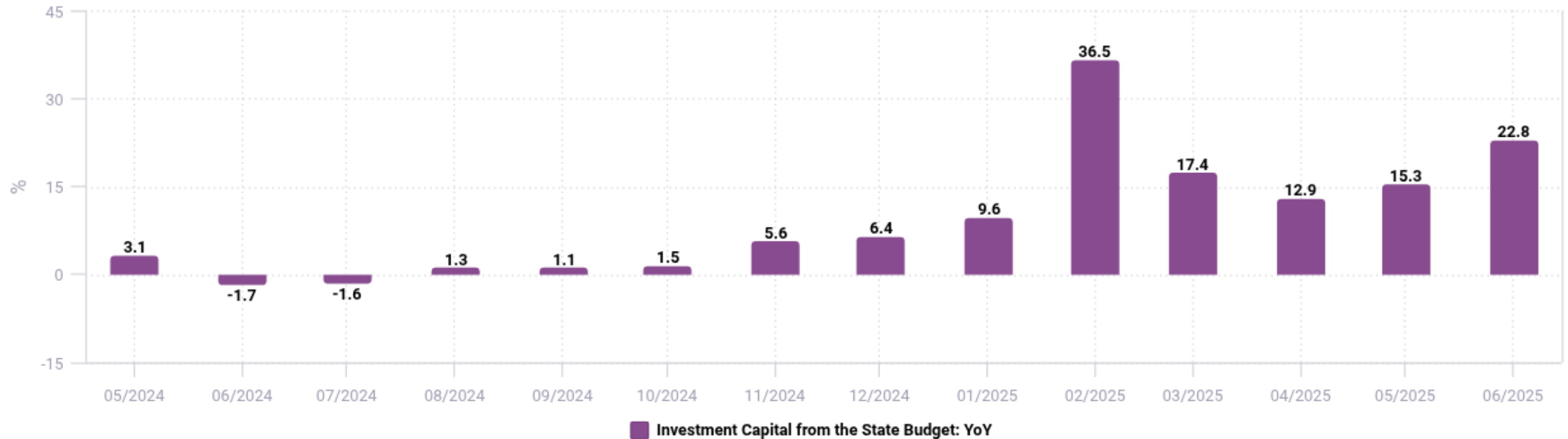
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Government investment surges – aiming to soften potential tariff impacts

Vietnam: Investment capital from the state budget, year-on-year increase



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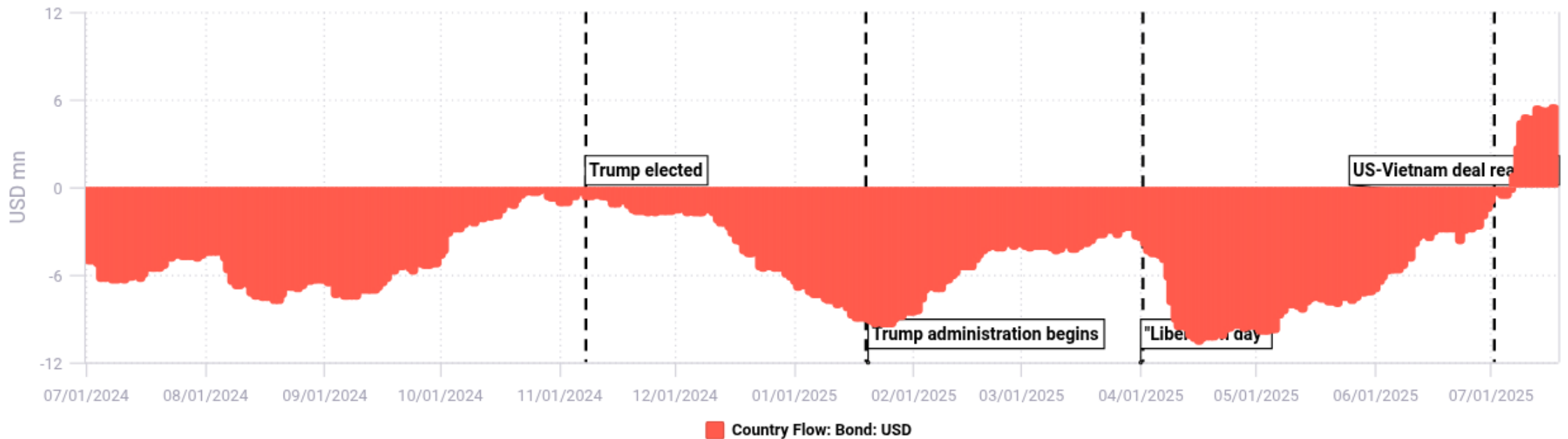
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EPFR fund flow data shows capital on the run: Long period of bond-fund outflows for Vietnam only recently turned around

Vietnamese bond funds finally turn to net inflows after US deal



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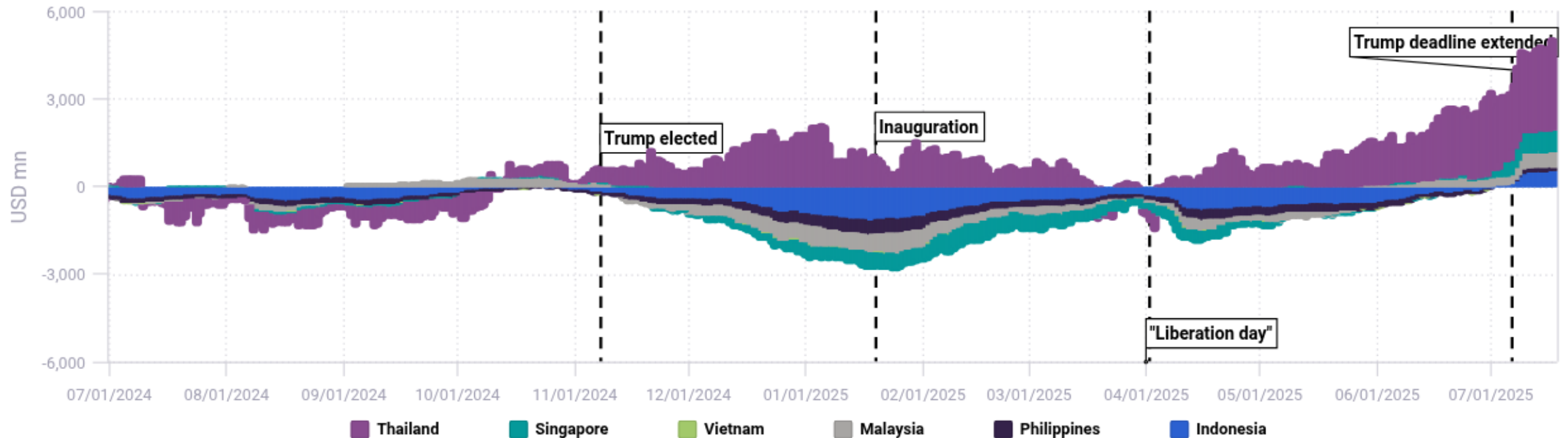
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Vietnam bond funds in ASEAN context: two Trump shocks prompt two episodes of regional outflows

ASEAN bond funds recently returned to net inflows



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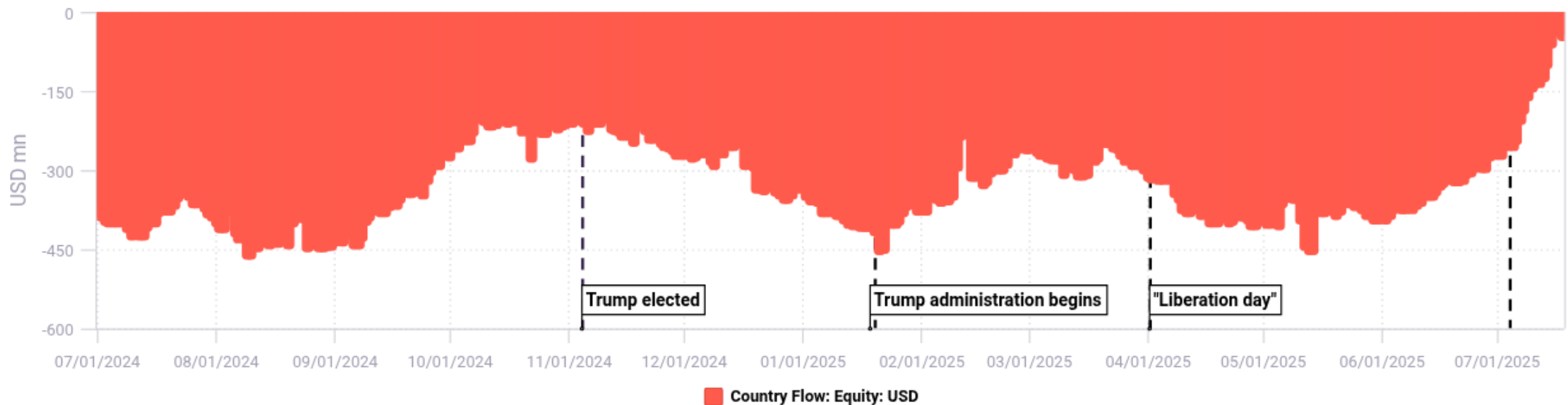
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A pause in the exodus: Vietnam equity fund outflows recently stabilized after Trump extended “reciprocal tariff” deadline

Net outflows from Vietnamese equity market funds

90-day rolling sum



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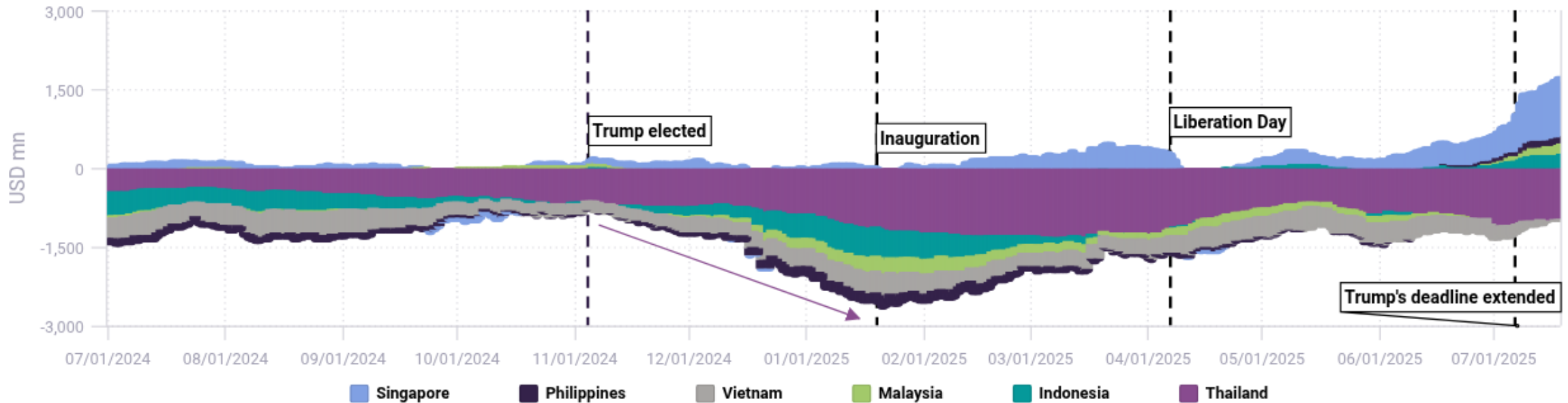
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Vietnam equity fund flows in ASEAN context: from weak performer to middle of the pack since July turnaround

Diverging performance of ASEAN equity fund flows

90-day rolling sum: Singapore inflows, Thai outflows stand out



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