

HDS X AHK VIETNAM SUPPLY CHAIN &
LOGISTICS SUMMIT | DECEMBER 11, 2025

GLOBAL TRADE & GEOPOLITICS: IMPACT ON SUPPLY CHAIN STRATEGY



Delegation der Deutschen
Wirtschaft in Vietnam
Delegation of German Industry
and Commerce in Vietnam

Image: Getty Images

AGENDA

1. Setting the Scene: Global Trade in a Fragmented World
2. Shifts in Trade Alliances and Tariffs
3. Southeast Asia's Growing Role
4. Vietnam at the Crossroads of Opportunity and Challenge
5. The New Supply Chain Mindset: Collaboration Over Competition
6. AHK Vietnam's Role: Bridging and Facilitating Partnerships

1. GLOBAL TRADE IN A FRAGMENTED WORLD

KEY TRENDS SHAPING BUSINESS

1.

Economic Interdependence

2.

Supply Chain Resilience

3.

Sustainability & ESG Pressure

4.

Shifting Alliances

5.

Conflicts & Saction

6.

Tech Rivalries



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1. GLOBAL TRADE IN A FRAGMENTED WORLD

GLOBAL SENTIMENT: GERMAN FIRMS

Trade is adapting, not collapsing —
Businesses show resilience despite uncertainty

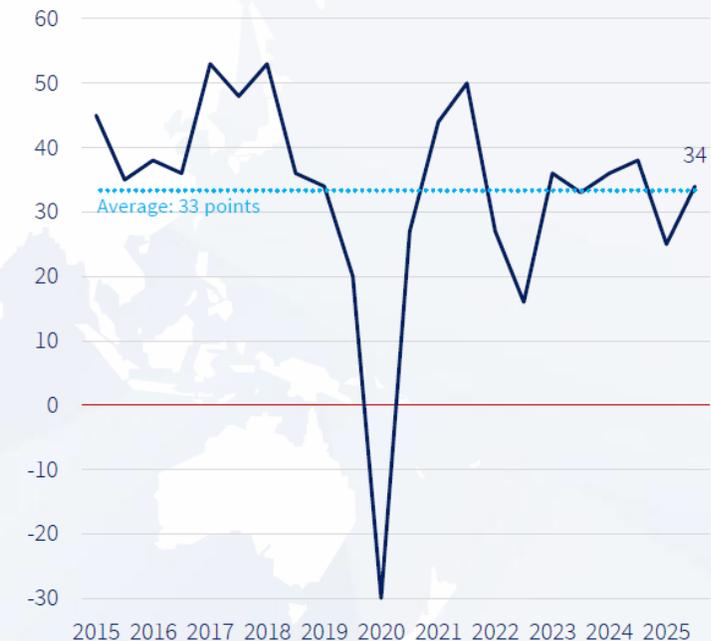
AHK World Business Outlook Fall 2025

Business expectations (balance in points)

Survey period: Sep 29 – Oct 17, 2025
Participants: 3,500+ German companies and
globally linked businesses

	Spring 2024	Fall 2024	Spring 2025	Fall 2025
World total	36	38	25	34
EU27	22	22	18	21
Eurozone	25	25	18	25
Other EU, Switzerland, Norway, UK	22	23	23	17
Eastern/Southeastern Europe (excluding EU), Turkey	31	8	13	17
Asia/Pacific (excluding Greater China)	47	43	35	41
Greater China	11	15	11	9
North America (=USA, Canada, Mexico)	51	50	5	26
South and Central America	54	51	47	47
Africa, Near and Middle East	54	58	54	61
MENA	59	61	53	62
Sub-Saharan Africa	37	52	55	58

Global business expectations



Balance in points (difference between better and worse)

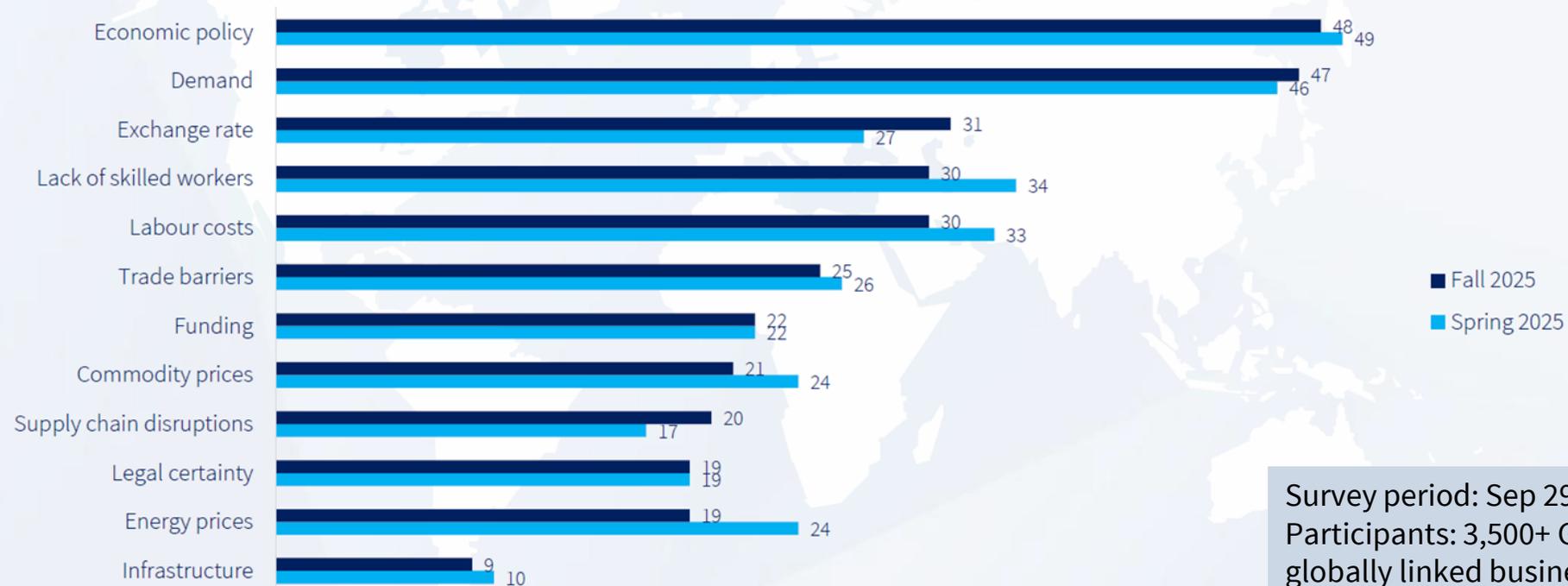
2. SHIFTS IN TRADE ALLIANCES AND TARIFFS

CHALLENGES TO GERMAN FIRMS

Firms must navigate a **new geopolitical reality**, led by the US–China trade environment.

AHK World Business Outlook Fall 2025

Risks for the global economy in the coming twelve months



Survey period: Sep 29 – Oct 17, 2025
Participants: 3,500+ German companies and globally linked businesses

Figures in per cent, multiple answers possible, question: Where do you see the greatest risks to your company's economic development in the coming twelve months?



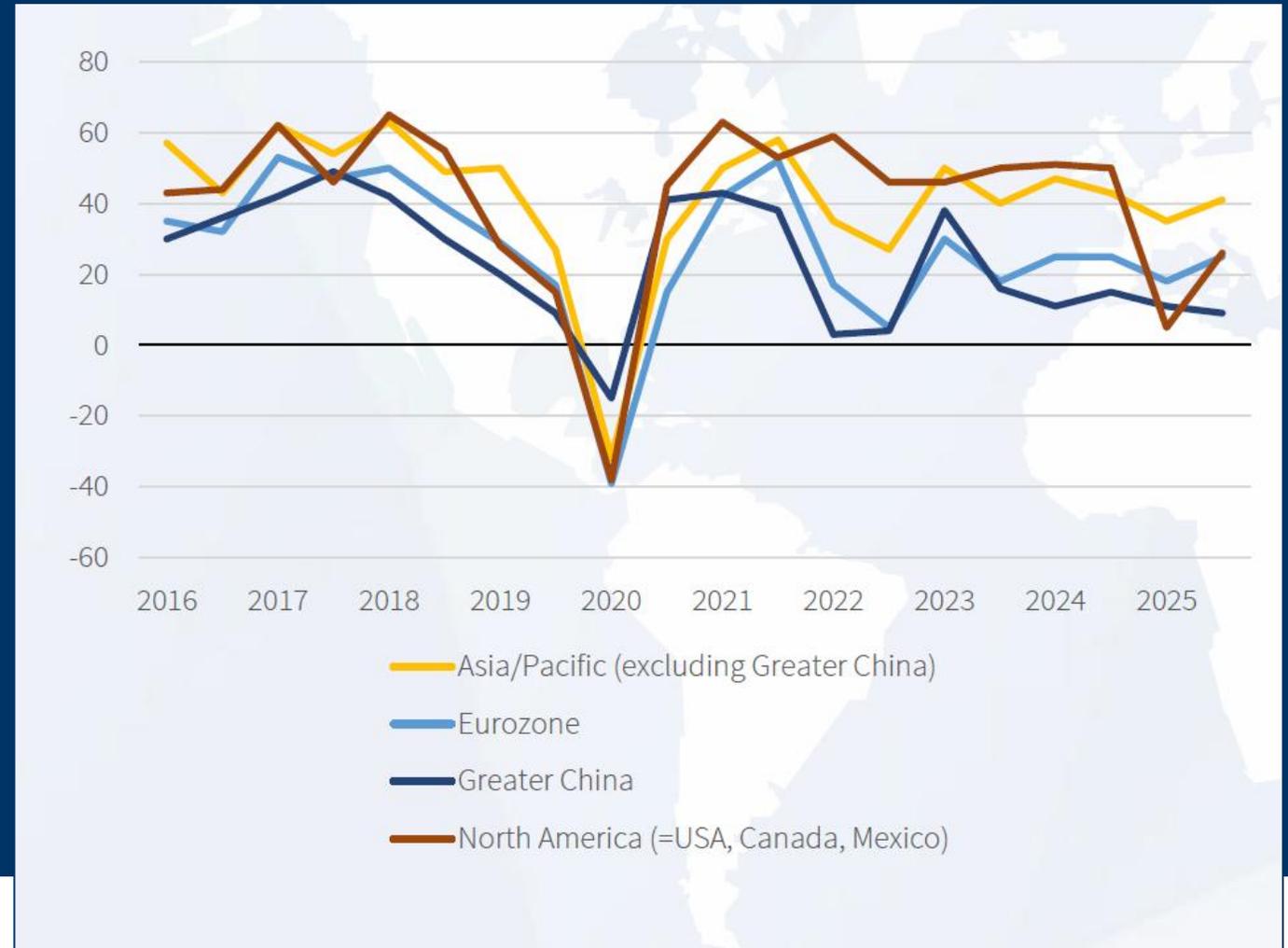
3. SOUTHEAST ASIA'S GROWING
ROLE

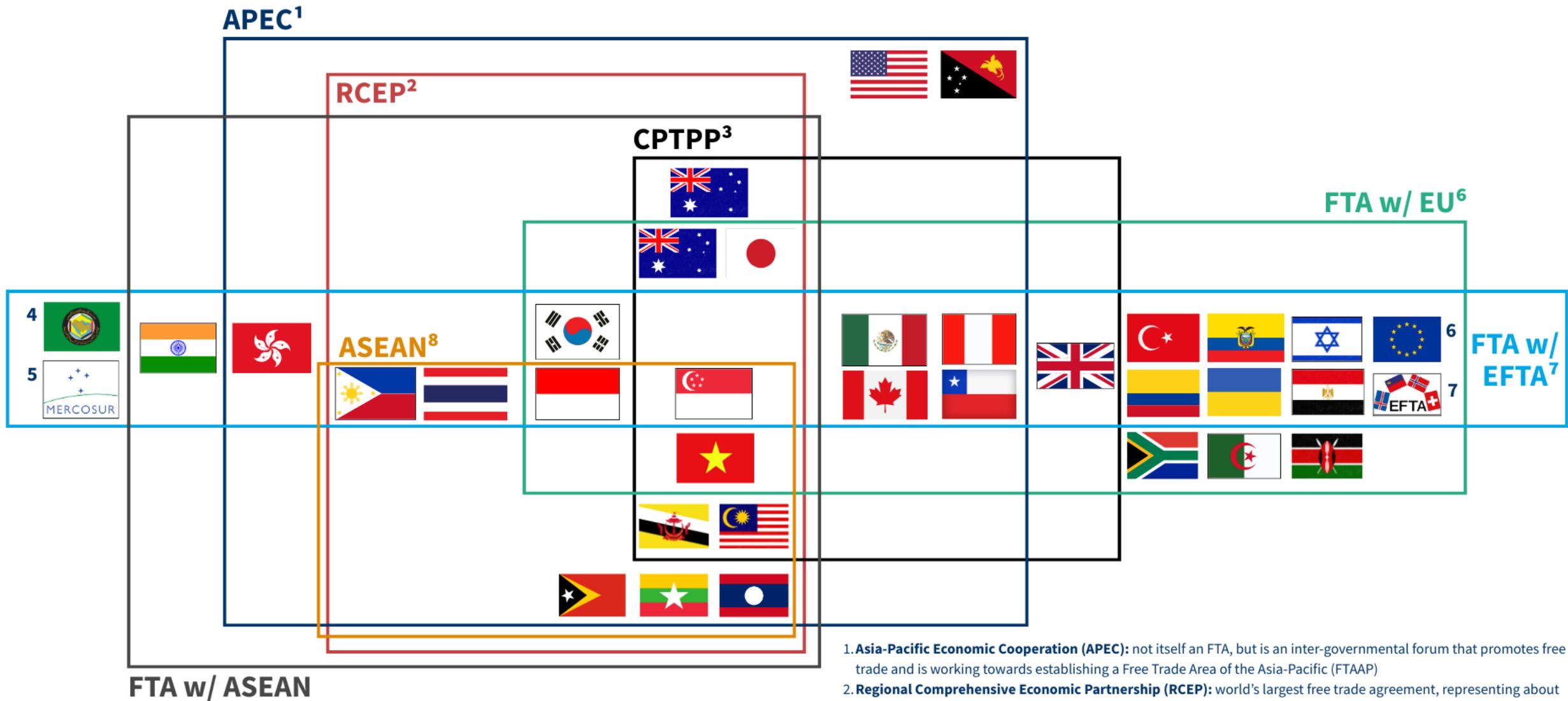
**ASEAN RISING:
THE REGIONAL
HUB OF THE
FUTURE**

3. SOUTHEAST ASIA'S GROWING ROLE

ASEAN GAINS FROM DIVERSIFICATION

Asia-Pacific (excluding China) shows **strong recovery in expectations** (+41 points)





GLOBAL FTA ARCHITECTURE

Overview of ratified and upcoming FTAs as of 28 Nov 2025, excluding bilateral agreements.

1. **Asia-Pacific Economic Cooperation (APEC)**: not itself an FTA, but is an inter-governmental forum that promotes free trade and is working towards establishing a Free Trade Area of the Asia-Pacific (FTAAP)
2. **Regional Comprehensive Economic Partnership (RCEP)**: world's largest free trade agreement, representing about 30% of global GDP and population
3. **Comprehensive and Progressive Trans-Pacific Partnership (CPTPP)**: "new generation" FTA due to inclusion of higher-standard provisions beyond typical tariff reductions (e.g., on digital trade, ESG)
4. **Gulf Cooperation Council (GCC)** (incl. Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE)
5. **MERCOSUR** (incl. Argentina, Bolivia, Brazil, Paraguay, Uruguay)
6. **European Union (EU)** incl. all 27 member states
7. **European Free Trade Association (EFTA)** incl. Iceland, Liechtenstein, Norway, Switzerland
8. **The Association of Southeast Asian Nations (ASEAN)** incl. Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, and Vietnam

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

VIETNAM'S STRATEGIC PARTNERSHIP LANDSCAPE

COMPREHENSIVE STRATEGIC PARTNERS

Country	Since
China	2008
Russia	2012
India	2016
South Korea	2022
United States	2023
Japan	2023
Australia	2024
France	2024
Malaysia	2024
New Zealand	2025
Indonesia	2025
Singapore	2025
Thailand	2025
United Kingdom	2025

STRATEGIC PARTNERS

Country	Since
Spain	2009
Germany	2011
Italy	2013
Philippines	2015
Brazil	2024
Czech Republic	2024
Finland	2025
Bulgaria	2025
Kuwait	2025

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

„CHINA + 1“ (CHINA + X)

Rising Labor Costs

Have tripled over the past ten years

Sudden shocks

e.g., 2019: US–China trade dispute; 2020: COVID-19; 2022: Extended COVID lockdowns; 2023: Ukraine

Diversification of Supply Chain

To avoid cluster risks from over-concentration in China

Vietnam as an *additional*, not an *alternative*, location;
Multiple sourcing instead of single sourcing

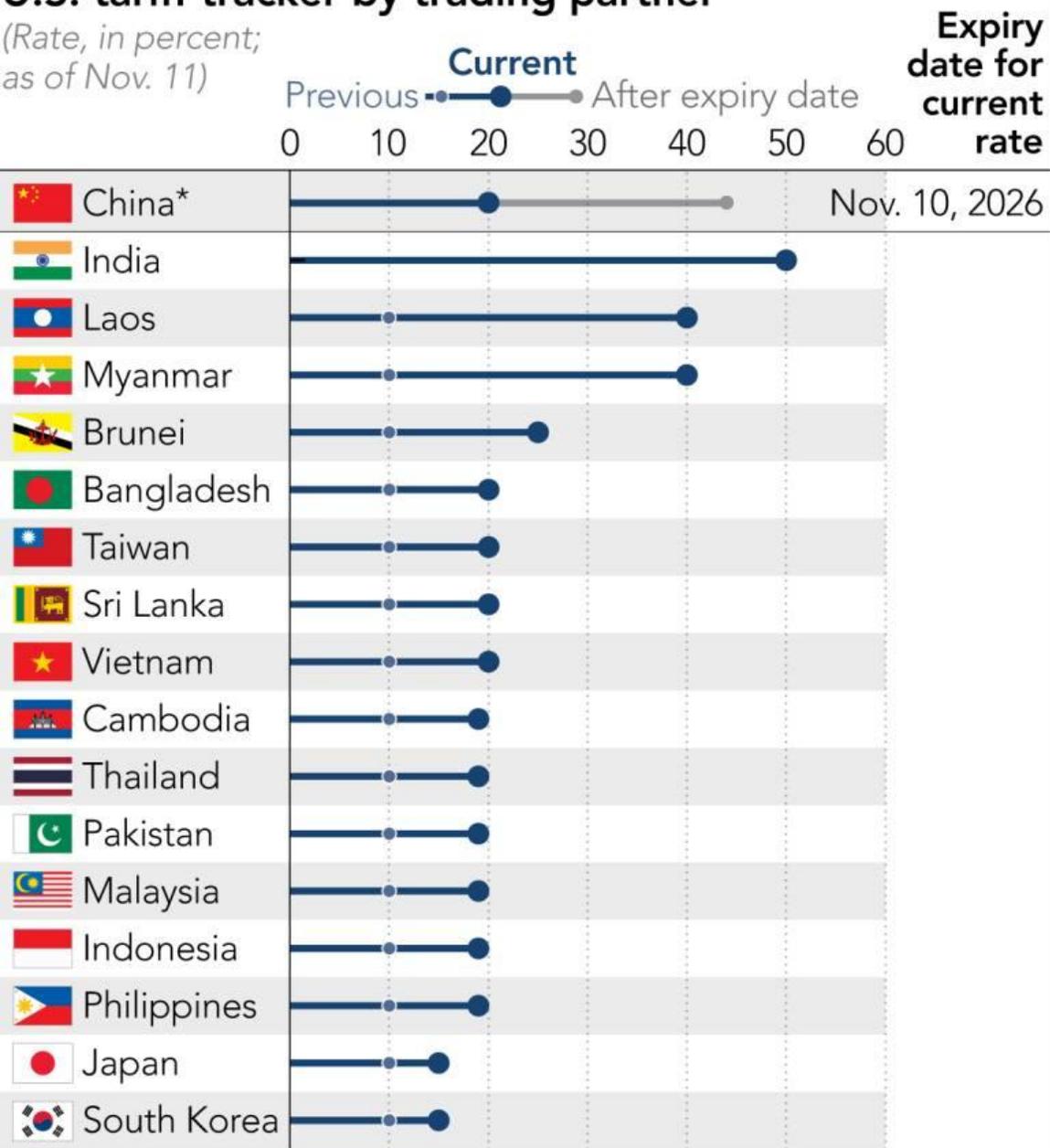


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U.S. tariff tracker by trading partner

(Rate, in percent;
as of Nov. 11)



*Including Hong Kong and Macao
Source: U.S. Census Bureau, White House

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

STABILITY AMID SHIFTING TRADE CURRENTS

- US-China tariffs driving diversification.
- How Vietnam benefits as an alternative manufacturing base.
 - Opportunities in electronics, textiles, and renewable energy
 - Challenge: Compliance with diverse standards
 - Risk: Becoming a transshipment hub → stricter rules of origin.

Before February 18, 2025

1

Arrangement and merger of ministries

18 Ministries

1. Ministry of National Defense
2. Ministry of Public Security
3. Ministry of Foreign Affairs
4. Ministry of Home Affairs
5. Ministry of Justice
6. Ministry of Planning and Investment
7. Ministry of Finance
8. Ministry of Industry and Trade
9. Ministry of Agriculture and Rural Development
10. Ministry of Transport
11. Ministry of Construction
12. Ministry of Natural Resources and Environment
13. Ministry of Information and Communications
14. Ministry of Labor, War Invalids and Social Affairs
15. Ministry of Culture, Sports and Tourism
16. Ministry of Science and Technology
17. Ministry of Education and Training
18. Ministry of Health

4 Ministerial-Level Agencies

1. Committee for Ethnic Minority Affairs
2. Government Office
3. Government Inspectorate
4. State Bank of Vietnam

From February 18, 2025

14 Ministries (minus 5 plus 1)

1. **Ministry of National Defense**
2. **Ministry of Public Security**
3. **Ministry of Justice**
4. **Ministry of Industry and Trade**
5. **Ministry of Culture, Sports and Tourism**
6. **Ministry of Health**
 - Will take over some functions from the Central Health Protection and Care Committee (after the committee ceases operation)
 - Expected to assume state management of social protection, child affairs, and social evils prevention from the Ministry of Labor, War Invalids, and Social Affairs
7. **Ministry of Foreign Affairs**
 - Will assume key functions of the Central Committee for External Relations and the National Assembly's Committee for External Relations (after their dissolution)
8. **Ministry of Education and Training**
9. **Ministry of Finance**
 - Merger of the Ministry of Planning and Investment and the Ministry of Finance
10. **Ministry of Construction**
 - Merger of the Ministry of Transport and the Ministry of Construction
11. **Ministry of Agriculture and Environment**
 - Merger of the Ministry of Agriculture and Rural Development and the Ministry of Natural Resources and Environment
12. **Ministry of Science and Technology**
 - Merger of the Ministry of Information and Communications and the Ministry of Science and Technology
13. **Ministry of Home Affairs**
 - Merger of the Ministry of Labor, War Invalids and Social Affairs, and the Ministry of Home Affairs
14. **Ministry of Ethnic and Religious Affairs (new)**

3 Ministerial-Level Agencies

1. Government Office
2. Government Inspectorate
3. State Bank of Vietnam

5 Government-affiliated agencies

1. The Viet Nam Academy of Science & Technology
2. The Viet Nam Academy of Social Sciences
3. The Viet Nam Television (VTV)
4. The Voice of Viet Nam (VOV)
5. The Viet Nam News Agency (VNA)

Before July 1, 2025

2

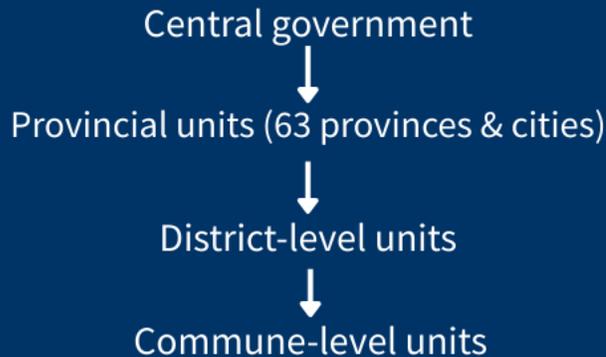
Provincial merging

Number of provinces & cities **63**

% of coastal provinces **44%**
(28 provinces)

% of provinces having seaports **54%**
(34 provinces)

3 tiers under central government



3

Restructuring of local governments

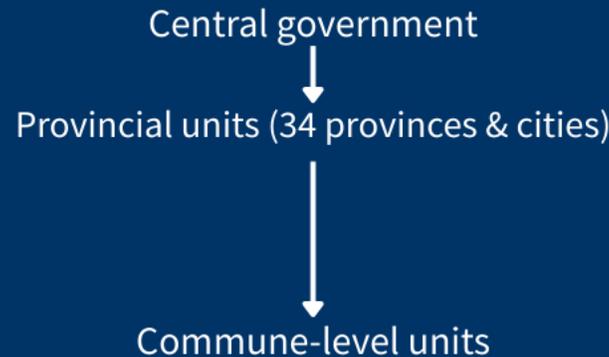
From July 1, 2025

Number of provinces & cities **34**

% of coastal provinces **62%**
(21 provinces)

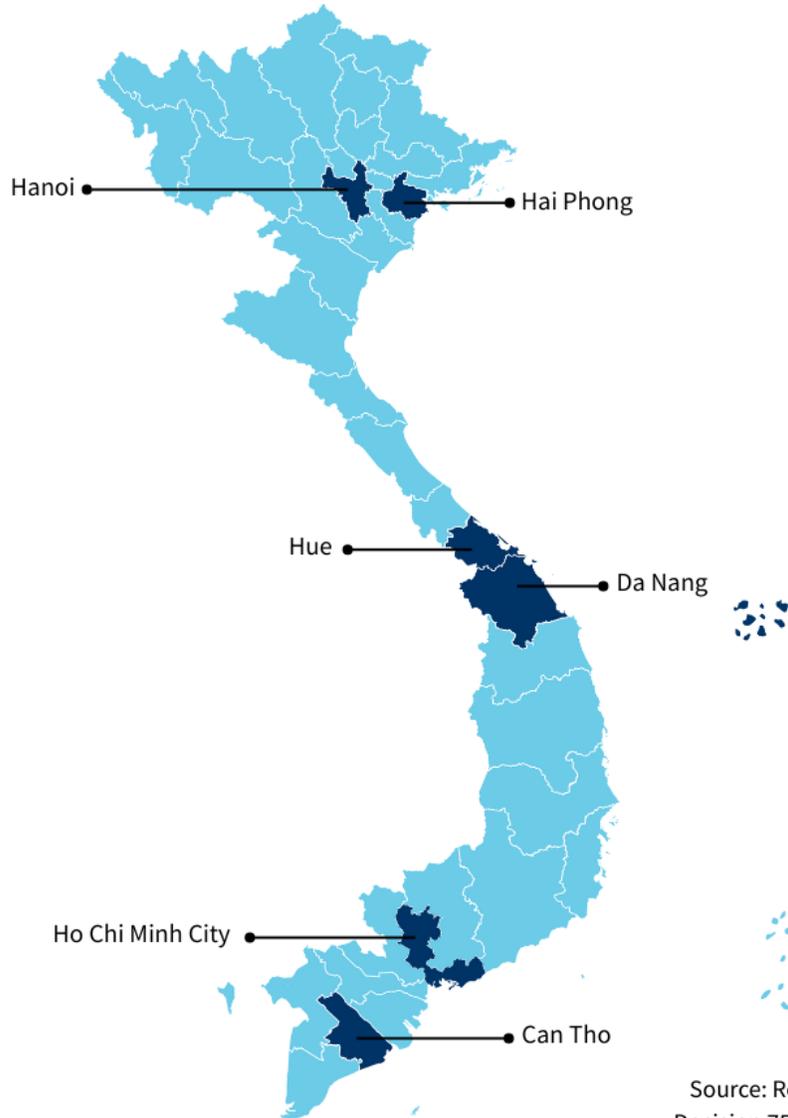
% of provinces having seaports **68%**
(23 provinces)

2 tiers under central government



Vietnam's largest administrative reform since reunification begins July 1, 2025, cutting districts and merging provinces and communes.

**Vietnam's
34 provinces & cities
from July 1, 2025**



Source: Resolution No.60-NQ/TW,
Decision 759/QD-TTg., AHK Vietnam

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

A REFORM-DRIVEN ECONOMY ON THE RISE

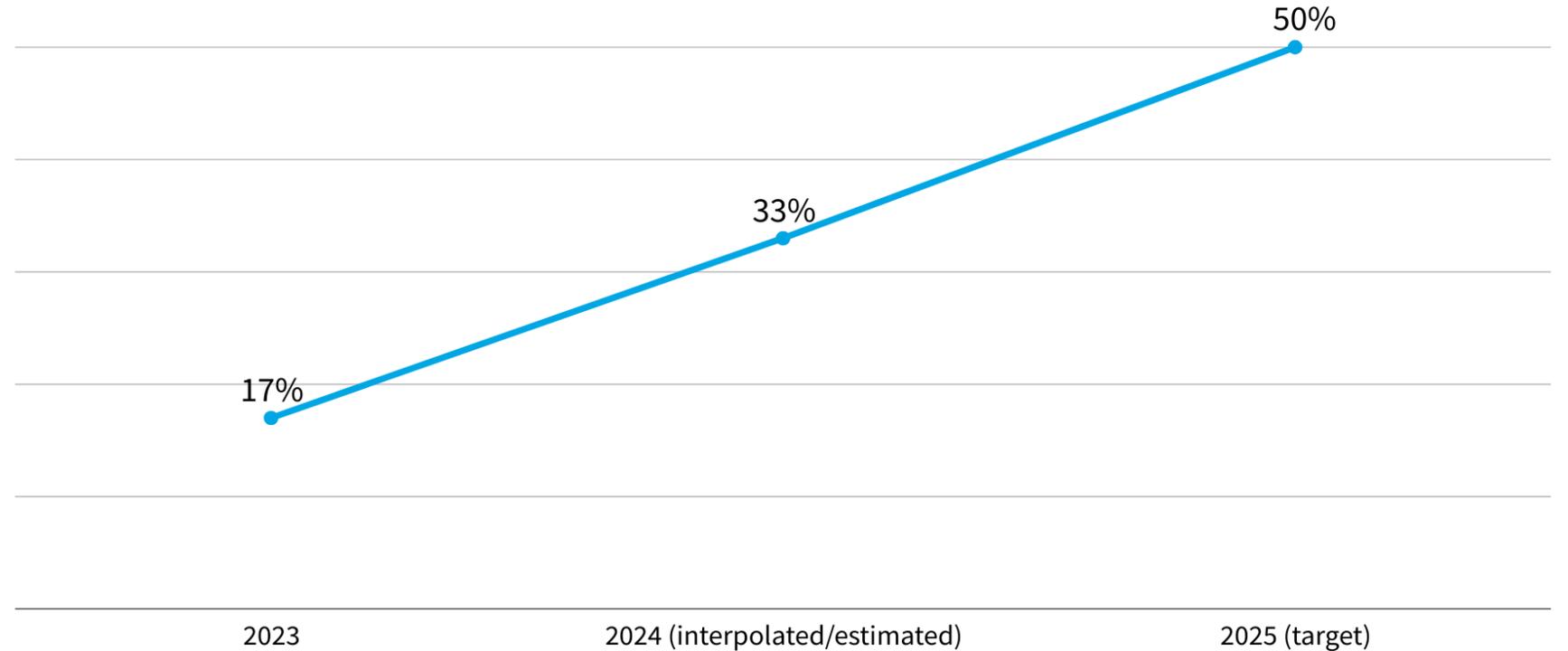
„For the first time, we see online services and one-stop centers actually making a difference. Procedures are still not perfect, but the change is real and positive.”

C-Level-Interviews by Delegation of German Industry and Commerce in Vietnam, August 26, 2025

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

VIETNAM'S LOGISTICS DIGITALIZATION ACCELERATES

Performance of
Online Services
Adoption in
Vietnam
(2023–2025)



Source: Ministry of Information and Communications (MIC), based on the government digital transformation roadmap, "National Digital Transformation Program, Government of Vietnam"

4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

VIETNAM'S LOGISTICS DIGITALIZATION ACCELERATES



National Single Window (NSW) adopted by **250,000+** enterprises

Mandatory E-customs and e-invoicing

Smart port initiatives in Hai Phong, Cai Mep-Thi Vai, and Saigon ports



4. VIETNAM AT THE CROSSROADS OF OPPORTUNITY AND CHALLENGE

WORKFORCE & SKILLS TRANSFORMATION

OPPORTUNITIES

A Young, Expanding Workforce

Resilience!

Rising Talent Demand in Digital Supply Chains

CHALLENGES

Shortage in mid-/high-skilled logistics roles

High turnover, rising retraining costs

Skills mismatch with industry requirements

5. THE NEW SUPPLY CHAIN MINDSET

RETHINK THE SUPPLY CHAIN

Trade

Policy

Risk

Strategy

5. THE NEW SUPPLY CHAIN MINDSET

COLLABORATION OVER COMPETITION



Future supply chains = Adaptability + Transparency + Cooperation

FIND YOUR RIGHT
CONNECTION IN THE
BUZZING WIRES.

Auf zu neuen Märkten. Mit den AHKs.





AHK VIETNAM BOOKLET 2025

Unlocking Business Potential in Vietnam



Scan for English version

XIN CẢM ƠN!



Image: Unsplash+



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