# ISSUES FOR VIETNAM'S AGRICULTURAL SECTOR AFTER 30 YEARS OF INNOVATION

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## SUMMARY

Base on secondary data which collected from the General Statistics Office to address the current situation of Vietnam's agriculture sector, namely the contribution of agriculture sector to Vietnam's economic growth and GDP, the value agricultural exports in the total value of Vietnam's exports, labor productivity of the agricultural sector and capital invested in the agricultural sector. In addition to the achieved results such as the agricultural sector has a stable growth rate, contributing to the growth of the economy; high export value; create a lot of jobs; Contributing to restructuring the economy, high value-added agricultural products, the agriculture sector is facing many challenging issues such as low labor productivity, capital investment in agriculture quick through the years but the efficiency of capital use is not high, the value of the sector's contribution to economic growth tends to increase slowly, the growth rate of the sector is still low, the production scale is small, the problem of epidemics, the hygiene and epidemiology, food safety, the environmental pollution in cultivation and husbandry are still unregulated… On that basis, the article proposes a number of recommendations such as supporting product consumption and market development; support and improve the efficiency of capital use; applied science and technology; training and developing human resources; developing linkage models to contribute to limit challenges and develop the agricultural sector in the future.

**Keywords: Agricultural exports, agricultural investment capitals, agricultural products, labor productivity, Vietnam's agriculture.**

## 1. INTRODUCTION

Since the implementation of a comprehensive renovation policy economy (1986), Vietnam's agriculture has made great achievements, confirming the important role and strategies in the development process of the country. Especially in the stages that the economy was in troubles, our country has maintained high growth rates and stability for a long time by changing the structure of plant cultivation and animal farming in a positive direction *(Binh, P.T, 2017)*. Basically, the farming industry, livestock, forestry and fisheries have significant developments with diverse production both in product types and organization structure. Production systems for medium and large scale has been formed, notably in livestock farming, rice cultivation, aquaculture and perennial crops. In 2017 the agricultural sector contributed 15.34% of GDP for the economy and 22.57% of the export value. Although being affected by the economic downturn, agricultural sector was the only sector that has export surplus during 2010-2017. In 2017, the export value of agriculture - forestry – fishery sector in the country reached 30.86 billion dollars, increasing 11.2% compared to 2016; therefore, it continues to be the sector that creates high added value with 9.5 billion dollars (GSO, 2018).

According to published data by General Department of Vietnam Customs**,** The agricultural sector has 10 commodity lines with more than 1 billion dollars of total turnovers, including: rice, coffee, rubber, cashew, pepper, cassava, vegetables, shrimp, fish and forestry products. While other industries are heavily influenced by the economic slowdown, the agricultural sector has overcome many difficulties, achieving a comprehensive and high growth rate. However, besides the achievements, our agricultural sector remains some limited restrictions and certain weaknesses. Therefore, the assessment of the actual situation and figure out the problems of our agricultural sector is necessary.

## 2. RESEARCH METHODOLOGY

### 2.1. Data collection

The article used secondary sources which are collected from the General Statistics Office and World Bank for analysis and evaluation. They are specific data sources on the growth rate of the agricultural sector, the contribution of agricultural sector to the economic growth and the GDP of Vietnam, value structure namely agricultural farming, livestock and

services agriculture, data on exports of the agricultural sector, the export structure of farming, livestock and services in the export value of Vietnam's agricultural sector, employment structure, value structure and labor productivity in agriculture, investment in agricultural development, and efficient use of capital. Relevant information and data were also used for the analysis in the article.

**2.2. Data analysis**

The main methods used in this research are descriptive statistical methods, statistical methods and statistical analysis, combined with statistical tables and graphs.

Using qualitative methods to analyze the nature, situation, opportunities and challenges for Vietnam's agricultural sector.

**3. RESULTS AND DISCUSSION**

**3.1. Current status of Vietnam's agricultural sector**

***The contribution of agriculture to economic growth and Vietnam's GDP:***

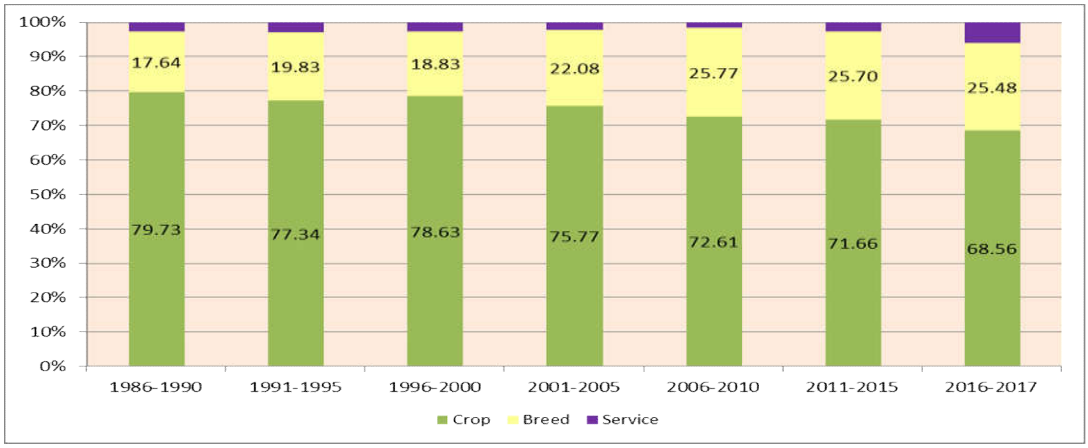
During 1986 - 1990 period, Vietnam has the average economic growth rate of 4.4%, in which the growth rate of the industrial sector was 7.4%, services 8.3% and agriculture 3.8%. This is the stage to receive the achievements from the innovation of economic thinking, open the economy to obtain external investment flows for the economic development. In the period 1996 - 2000, the agricultural sector had only 6.94% growth and contributed to 25.7% GDP growth of the economy. The growth rate of the agricultural sector in the period 2005 - 2017 tended to decrease and the proportion of contribution to GDP was between 15.34 and 21%.*[Calculating from General statistics]*

**Table 1. The contribution of agricultural sector to Vietnam economic growth and GDP over the period 1986 - 2017**

| No. | Target | 1986 - 1990 | 1991 - 1995 | 1996 - 2000 | 2001 - 2005 |
|---|---|---|---|---|---|
| **1.** | **Grow rate of overall GDP (%)** | **4.40** | **8.18** | **6.94** | **7.51** |
| 1.1 | Industrial sectors | 7.40 | 12.00 | 10.60 | 10.25 |
| 1.2 | Service sectors | 8.30 | 8.60 | 5.75 | 6.96 |
| 1.3 | Agriculture sectors | 3.80 | 4.09 | 4.30 | 3.83 |
| **2.** | **The structure of GDP (%)** | **100** | **100** | **100** | **100** |
| 2.1 | Industrial sectors | 23.21 | 28.06 | 33.49 | 38.90 |
| 2.2 | Service sectors | 41.15 | 41.77 | 40.81 | 39.45 |
| 2.3 | Agriculture sectors | 35.64 | 30.16 | 25.7 | 21.66 |
| **No.** | **Target** | **2006 - 2010** | **2011 - 2015** | **2016** | **2017** |
| **1.** | **Grow rate of overall GDP (%)** | **7.02** | **5.91** | **6.21** | **6.81** |
| 1.1 | Industrial sectors | 7.94 | 7.22 | 7.57 | 8.02 |
| 1.2 | Service sectors | 7.73 | 6.67 | 6.98 | 7.44 |
| 1.3 | Agriculture sectors | 3.34 | 3.08 | 1.36 | 2.90 |
| **2.** | **The structure of GDP (%)** | **100** | **100** | **100** | **100** |
| 2.1 | Industrial sectors | 37.89 | 33.13 | 32.71 | 33.40 |
| 2.2 | Service sectors | 42.90 | 48.71 | 50.97 | 51.26 |
| 2.3 | Agriculture sectors | 19.21 | 18.16 | 16.32 | 15.34 |

*(Source: GSO, 2018)*

In the period 2005 - 2017, the growth rate of the agricultural sector was not high and lack of stability and sustainability. The agricultural growth rate reached 4.19% in 2005 then fell in 2006, 2007 and rose to peak in 2008 (reaching 4.69%) before dropping sharply to 1.91% in 2009. It then recovered in the 2010, 2011 and sharply declined in 2012 and 2013 (also 2.64%) and raise up to 2.9% growth in 2017. Regarding the structure of the agriculture, the restructuring production value among 3 sectors: farming, livestock and services over the period 1986 - 2017 were reflected in figure 1.




*(Source: GSO, 2018)*

**Figure 1. The Structure of agriculture sector in the 1986 - 2017 (At current prices)**

In the value structure of the agricultural sector, the farming sector still accounts for a large proportion, maintains at high structure level (over 70%) and tends to decrease from 79.71% down to 71.96% during 1986 - 1990. Contrary to the trend of cultivation in agricultural value structure, the structure of the livestock sector tends to increase over the period from 17.67% to 26.20%. This indicated that the livestock industry is expressing its role by enhancing its value contribution to the agricultural sector. In addition, the structure of the agricultural service sector tends to decrease structurally in agriculture value chains at around 2%.

***The value of exports of agricultural sector in the total value of Vietnam's exports:***

Agriculture not only contributes to fulfill the requirement of national food security and domestic consumption but also meet the needs of export agricultural products which are from strong brands of Vietnam such as rice, coffee, rubber, seafood, and... attract major sources of foreign currency for the country. In 1986, the value of agricultural, forestry and fisheries exports reached only $ 486.2 million USD; however in 2000 it amounted to $ 4.2 billion and beyond the threshold of 36.37 billion USD by 2017, which was almost 60 times higher than in 1986.

The statistics about the export value of Agriculture in the 1986 - 2017 period (Figure 2) showed that the sector's share accounted for 54.01% between 1986 - 1990, then there was a downward trend in the exports structure which accounted for only 14.4% of the country in the period 2016 - 2017. Despite the rise of the sector's export value, the share of the export value of the country tends to decrease.

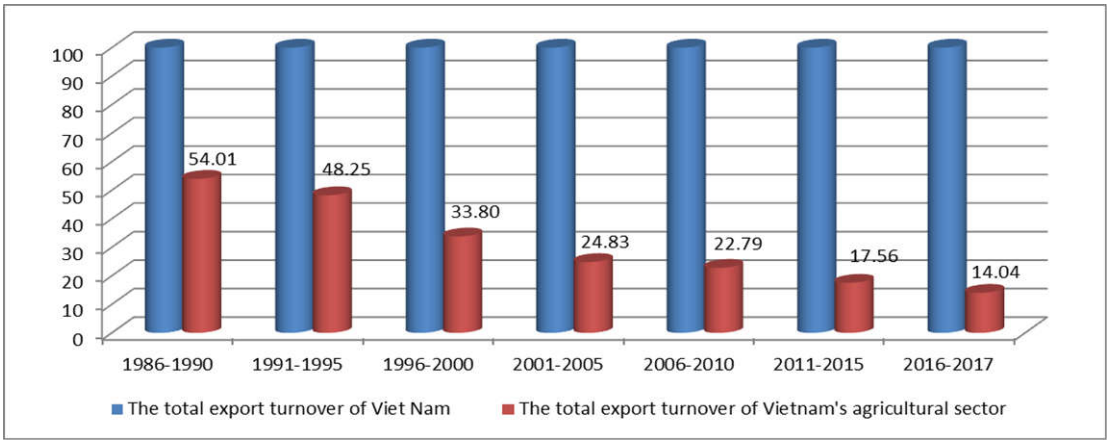



**Figure 2. The share of agricultural export value in total export value in the period 1986 - 2017 (unit: %)**

*(Source: GSO, 2018)*

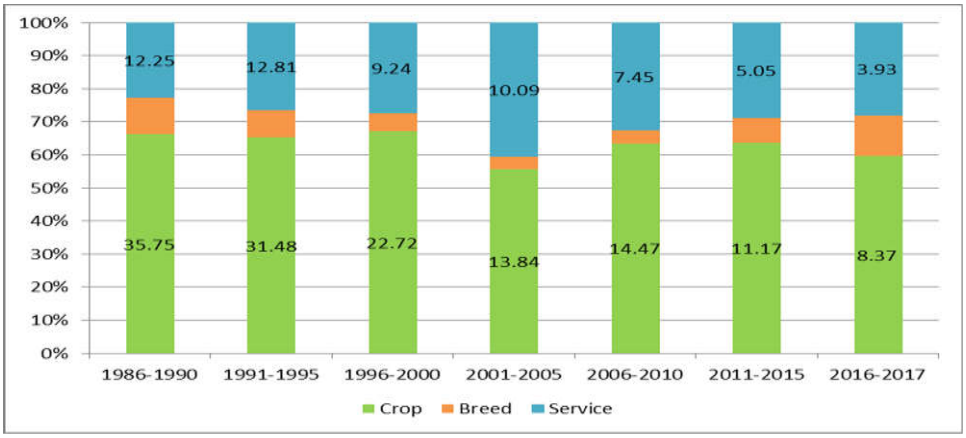



**Figure 3. The structure of exports of farming, livestock and services in the value of agricultural exports period 1986 - 2017 (unit: %)**

*(Source: GSO, 2018)*

The growth rate of export turnover of agro-forestry products reached average 17.31% per year over the period 1986 - 2017. Particularly in 2017, the total export value reached 36.37 billion dollars nationwide, up 11.2% compared to 2016. There were 10 items turnover of 1 billion (rice, coffee, rubber, cashew , pepper, cassava, vegetables, shrimp, fish, and forest products) in agriculture. Thanks to the great achievements in exporting, agriculture is the only sector always trade surplus, while Vietnam's overall trade deficit regularly. Export of agricultural products not only balance the national trade but also enhance the prestige and position of Vietnam in the international area.

In the structure of the value of agricultural exports of Vietnam period 1986 - 2017. Through the data sheets, we can see the proportion of the value of agricultural exports still play a key role, although exports have decreased over the years but remains at around 65%. By 2013, Vietnam ranked first in pepper export (accounting for 14.3% of the world market), first in coffee export (40% of world market share), the second in rice export (up 12% market share), and the second in cashew export (accounting for 9.5% of the world market). The contribution of the fisheries sector in the value of agricultural exports has grown rapidly over time and accounted for exports worth 25 - 30% of the total export value of the industry as frozen shrimp, catfish...

***Industrial labor structure and productivity in agriculture:***

In 1986, the agricultural sector attracted 72.91% of workers in the whole society (Figure 4). Vietnamese labor tends to gradually shift to service industries because these industries have higher labor productivity compared to agriculture and this is an indispensable trend-shift. To 2017, the active labor in the agricultural sector fell down to 40.16%.

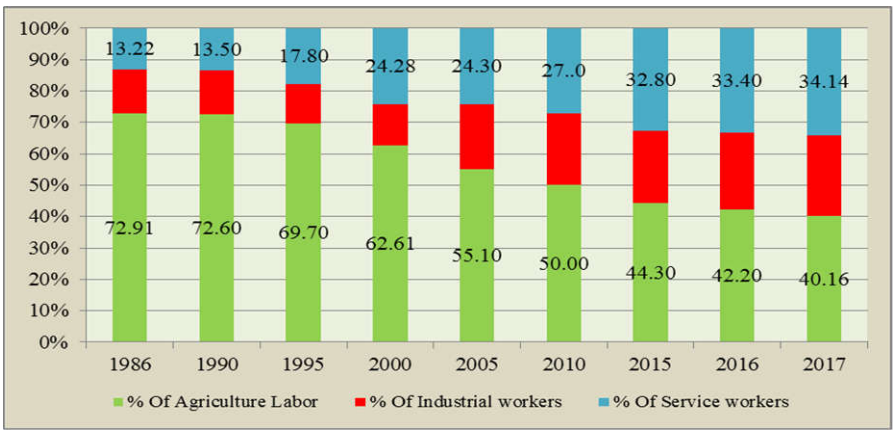



**Figure 4. The structure of labor in the period 1986 - 2017 (unit: %)**

*(Source: GSO, 2018)*

Although the labor of the agricultural sector accounted the largest proportion of total national employment (46.3% in 2017), the labor productivity of this sector was at very low levels (Table 3). Labour productivity in agriculture was estimated only 1/4.5 of the yield industry and about 1/3.4 of the service sector productivity. Low yields indicated that the effect of the use of labor is low and the application of modern science and technology is still limited. In 2017, the labor productivity of Vietnam (calculated at current prices) reached 35.6 million VND/person, 1.08 times higher than in 2016. Employment in the agricultural sector accounted for the highest proportion in 2017 is 40.16% but the value contribution to GDP accounted for only 18.12%.

**Table 2. The structure of labor, value and productivity of agriculture in the period 1986-2017**

| Year | Labor structure of economic sectors (%) | | | Structure of the sector in GDP at current prices (%) | | | Labor productivity at current prices (million / person) | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Agri | Industry | Service | Agri | Industry | Service | Whole economy | Agri | Industry | Service |
| 1986 | 72.91 | 13.87 | 13.22 | 38.06 | 28.88 | 33.06 | 2.43 | 1.26 | 5.04 | 6.06 |
| 1990 | 72.6 | 13.9 | 13.5 | 38.66 | 22.7 | 38.64 | 15.67 | 6.54 | 28.29 | 24.94 |
| 1995 | 69.7 | 12.5 | 17.8 | 27.18 | 28.76 | 44.06 | 16.86 | 6.82 | 31.48 | 26.73 |
| 2000 | 62.61 | 13.1 | 24.28 | 24.54 | 36.73 | 38.73 | 18.23 | 7.09 | 35.26 | 29.03 |
| 2005 | 55.1 | 20.6 | 24.3 | 21.58 | 38.12 | 40.31 | 19.5 | 7.4 | 39 | 30.7 |
| 2010 | 49.5 | 21 | 29.5 | 18.89 | 38.23 | 42.88 | 44 | 16.8 | 80.3 | 63.8 |
| 2011 | 48.4 | 21.3 | 30.3 | 18.5 | 38.39 | 43.12 | 55.2 | 22.9 | 98.3 | 76.5 |
| 2012 | 47.4 | 21 | 31.6 | 18.05 | 38.57 | 43.38 | 63.1 | 26.2 | 115 | 83.7 |
| 2013 | 46.8 | 21 | 32.2 | 17.57 | 38.57 | 43.86 | 68.7 | 27 | 124.1 | 92.9 |
| 2014 | 46.6 | 21.4 | 32 | 18.12 | 38.5 | 43.38 | 74.3 | 28.9 | 133.4 | 100.7 |
| 2015 | 44.3 | 22.9 | 32.8 | 17.00 | 33.15 | 49.75 | 79.4 | 30.6 | 133.6 | 106.6 |
| 2016 | 42.2 | 24.4 | 33.4 | 16.32 | 32.72 | 50.96 | 84.5 | 32.9 | 136.2 | 112.1 |
| 2017 | 40.16 | 25.7 | 34.1 | 15.34 | 33.40 | 51.26 | 93.2 | 35.6 | 155.1 | 120.9 |

*(Source: GSO, 2018)*

Social labor productivity in 2017 at current prices of the whole economy was estimated at $ 93.2 million VND/employees (equivalent to about $ 3,515 USD/labor), in which labor productivity of agriculture, forestry and fisheries now reached $ 35.6 million VND/employees, accounted for 38.9% of the labor productivity of the whole economy; industrial areas and construction reached $ 155.1 million VND/labor, higher 1.8 times compared to social labor productivity while services sector reached 120.9 million/labor with 1.36 times higher. Calculated at constant prices of 2010, labor productivity across the economy in 2017 is estimated up 9.13% compared to 2016, while the labor productivity of agriculture, forestry and fisheries increased by 8.2%; industrial areas and construction increased by 13.8%; the service sector increased by 7.8%. In general, labor productivity in agriculture is the lowest labor productivity of the whole economy and and the lowest among employees working in the sector of the economy. Besides, the growth rate of agricultural productivity is also very low that makes agricultural workers tend to be lagging behind.

***Capital investement for agriculture development***

Social investment capital for the agricultural sector increased by 2.3 times, from 1995 to 9 trillion over 20 trillions in 2007, but the growth rate is very low compared to the investment in the social services sector (increased 4, 4 times) and industry (6.2 times increase). Of the total investment of the ten years (2001 - 2010, calculated at current prices) which was above 4336.6 trillion, the investments in the agriculture, forestry and fisheries was 304.8 trillion, accounting for 7%; industrial areas and build 1792.9 trillion, accounting for 41.4%; service area 2238.9 trillion, accounting for 51.6%. In 2000, the total investment in agriculture accounted for about 13.8% of GDP, fell by 7.5% in 2005, 6.45% in 2008 and 6.26% in 2010. However, in 2017, although the investment was 61.2 trillion amount increased almost 3 times more than in 2000, the proportion of capital allocated to the sector fell 5.6%. Thus the agricultural investment can be seen that it was not commensurate with the potential development of the industry. It didnot create new capacity in infrastructure required by the restructuring of the agricultural sector under its objectives. It did not invest intensively in high-quality agriculture, plant and animal breeding, plant pesticides, post-harvest technology, and so on. These factors made agricultural products at low added value, no highlights and highlights impetus to agricultural development. Meanwhile, the proportion of investment tend to rise in the industry and especially services accounted for 58.3% in 2017.

**Table 4. The investment structure to the sectors in the period 2000 – 2017**

| Year | Total investment (thousand billions VND ) | | The proportion of capital allocated to the sector (%) | | |
|---|---|---|---|---|---|
| | All society | Investments in agriculture | Agriculture | Industry | Service |
| 2000 | 151.2 | 20.9 | 13.8 | 39.2 | 47.0 |
| 2005 | 343.1 | 25.7 | 7.5 | 42.6 | 49.9 |
| 2010 | 830.3 | 54.0 | 6.5 | 40.5 | 53.0 |
| 2011 | 924.5 | 55.3 | 6 | 40.4 | 53.6 |
| 2012 | 1,010.1 | 52.9 | 5.2 | 41.5 | 53.3 |
| 2013 | 1,094.5 | 61.2 | 5.6 | 41.8 | 52.6 |
| 2014 | 1,220.7 | 61.5 | 5.3 | 42.4 | 52.3 |
| 2015 | 1,336.5 | 76.5 | 5.6 | 38.0 | 56.4 |
| 2016 | 1,487.6 | 87.5 | 5.9 | 37.5 | 56.6 |
| 2017 | 1,668.6 | 100.1 | 6.0 | 35.7 | 58.3 |

*(Source: GSO, 2018)*

In addition, although investments in the agricultural sector increased rapidly over the years and an average increase of over 10% in the period from 2000 to 2017 but agriculture ICOR period from 2000 to 2017 increased from 2.09 in 2000 to 6.4 in 2009 and fell to 4.49 in 2017, reflecting the efficient use of capital in the agricultural sector has declined in the recent. In the period 2000-2005, the average ICOR was at 2.1 to 1; it means that Vietnam needs to invest 2.1 capital to get 1 capital of agricultural growth. To the period from 2006 to 2010, there was an average increase of ICOR to 3.8, and 3.5 in the period from 2011 - 2013.

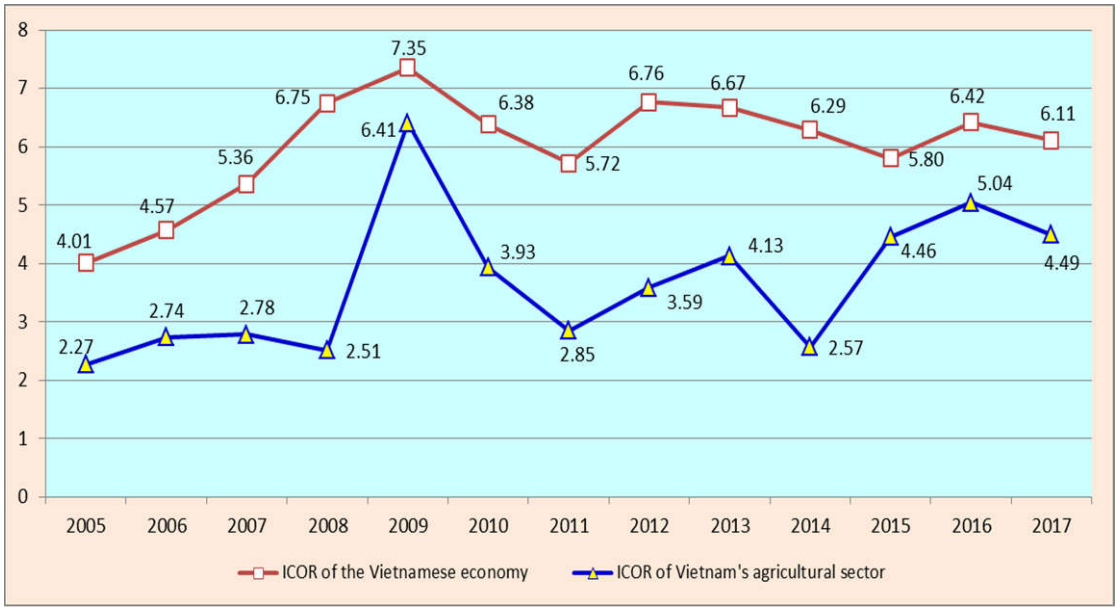



**Figure 5. The ICOR of the sector in 2005 - 2017**

*(Source: GSO, 2018)*

From the analysis on the current situation it can be seen that the agricultural sector has made remarkable achievements after nearly 30 innovations, contributing to the overall development of the country. However, during the development, the agricultural sector faces many problems affecting the development of the sector. This is discussed in the next sections.

**3.2. The problems and challenges of the Vietnamese agricultural sector**

First, labor productivity in agriculture is still low: Labor in agricultural sector accounted for the largest proportion compared with other sectors of the economy. However, labor productivity of this sector was very low and estimated only 1/4.5 yield industry and about 1/3.4 service sector productivity. Low yield suggested that the effect of the employers of the sector is low.

Second, the investment in the agricultural sector increased rapidly over the years and an average increase of over 10% in the period from 2000 to 2017, but efficiency is not high capital expressed through ICOR in agriculture in 2009 from 6.41 fell to 4.49 in 2017, reflecting the efficiency of capital use in agriculture has recently declined *(GSO, 2018)*.

Third, the sector's growth rate in 2005 - 2014 period is less than 3% as the negative effect of WTO and FTA joining. In particular, together with nowadays in-depth integration trend, the agricultural sector in the country will continue to face with many difficulties. The level of competition with imported products increases intensively, especially the competition among countries in ASEAN region after the ASEAN Economic Community (AEC) was established by the end of 2015. By the end of 2014, the level of trade liberalization in the ASEAN region was the highest with approximately 75% of the import tariffs were reduced to 0%. The joining into AEC requires faster and broader tariff reduction. Therefore, only sensitive agricultural commodities remain low tax rate at 5%, and the meat import tax will be reduced to 0%. This is a significant challenge to Vietnamese agricultural sector. In addition, the growth rate of the agricultural sector of Vietnam has decreased due to a negative impact of the world market prices of materials and products (supply price increases, while agricultural prices do not increase or even decrease, creating unfavorable terms of trade for agricultural production) and the increase of trade barriers on food safety of the country for the export of agricultural commodities from Vietnam.

Fourth, the agricultural production is still in

small. and dispersed scale, and is depended heavily on imported inputs factors such as seed, fertilizer, pesticides, veterinary drugs, animal feed, and so on. The contribution of agriculture to economic growth and Vietnam's GDP is small, only accounted for 15.34% in 2017 (GSO, 2018). The high input cost is due to its dependence on imported inputs of materials for manufacturing and farming according to the statistical report of the Ministry of Agriculture and Rural Development in 2017, the import value of the sector in 2017 reached 27.82 billion USD while export turnover of the sector reached 36.37 billion USD. This leads to the high-cost agricultural products and passive production. Besides, post-harvest preservation and processing technology have not been focused, so the added value of the agricultural products is not high and there are not many key products with national brands.

Fifth, output markets for Vietnam's agriculture has not been invested and focused.

The major importing countries of Vietnam's agricultural products such as the US, EU, China, Japan, Korea, and China... all increased protection of agricultural products through standards of quality management and safetybio food, traceability requirements; The trade conflict between the US and China, the uncertainties surrounding Brexit, the geopolitical instability in the world also affect the export of Vietnam's agricultural products. Competitive capacity of the agricultural sector is low because of the low productivity and quality of agricultural products. The consumption market is instable, less diverse and dependent on a few traditional markets. The main export channel is direct export through unofficial channel which leads to many potential risks.

Sixth, agricultural products are facing with high competition in the context of free trade agreements. The tax reduction in joining AFTA, CPTPP, EAC will benefit the sector greatly from tariffs. Specifically, major markets such as Canada, Australia and Japan reducing import tax to 0% for our agricultural products will create positive effects in promoting turnover export. Accordingly, Vietnamese enterprises, when exporting agricultural products to the markets of the member countries of the CPTPP, will enjoy preferential tariff reductions, helping to expand export markets and increasing access to markets largest in the world with significant advantages. Based on Customs hanbook on international Merchandise trade statistics of Vietnam 2017, the value of Vietnam's agricultural product exports has reached 20.943 milliions USD while while imports of this commodity group reached 14.001 milliions USD. The products from these countries have formidable competitive advantage compared to Vietnamese products. Therefore, the agricultural products from ASEAN countries, China, South Korea... enter Vietnam with cheap price, high quality and wide varieties of design. Agricultural products, businesses and farmers in Vietnam are facing with stiff competition in the meantime, so the agricultural products and farmers are the most vulnerable subjects in the integration period.

Seventh, issues related to diseases, sanitary and phytosanitary safety, food safety, and environmental pollution in livestock farming and cultivation have not been controlled yet. Pollution of agricultural inputs has increased significantly in Vietnam in the past two decades with the expansion and crop intensification (World Bank 2018). If there are no or not enough technical barriers with effective sanitary and phytosanitary measurement, Vietnam will become a consuming market of low-quality products. This will affect the health of consumers and cannot protect the domestic producers. Meanwhile, the present regulations about waste water from livestock farming are making difficulties for the business. In Thailand and other advanced countries, composting and waste water only need to be incubated and

filtered through biogas system prior to be used for plant irrigation while Vietnam requires the wastewater treatment to meet Class A, leading to high cost production of livestock enterprises.

Eighth, the research and application of science and technology in agricultural production, as well as the investment of funding for science and technology in the field of agriculture is still limited. In the context of economic integration, the comprehensive quality enhance of agricultural products has many challenges. The investment in high-technology and clean agriculture and the genetic technology requires high investment costs and long time but the agriculture is still in low efficiency and slow payback time. By the end of 2017, the country had more than 49,600 enterprises investing in agriculture, accounting for 8% of the total number of enterprises operating in the country. However, enterprises directly producing agricultural, forestry and fishery products account for only about 1% of the total number of enterprises with 7,600 enterprises. The main form of agricultural production organization is still in the form of production households with more than 9.2 million (Nguyen Xuan Phuc, 2018)

## 4. CONCLUSIONS AND RECOMMENDATIONS

Vietnam's economy evolved from the status of a backward agricultural country revive after the war. After 30 years of innovation in the field of agriculture, policies of the Party and the State provide priorities to the development of agriculture through policy reform in each period such as the three agricultural policy, land policy for agriculture, deposit and capital investment policy in agriculture, and policies of science and technology have put our agricultural sector from an import country to self-sufficiency of food and then food export country in the third rank all over the world. Vietnam has ten exported agricultural products which have the value over a billion dollars. In the period of economic slowdown, the agricultural sector remains stable growth.

Despite many achievements, the agriculture of Vietnam still has to face with many challenges. The agricultural products are less competitive compared to other countries in the region and in the world. There are not many high value-added agricultural products. The agricultural production is small and fragmented. Although the capital investment in the sector has increased over years but it still not commensurate with the potential of the agriculture. The labor productivity of the sector is still low, so the lives of workers have not much improved. The epidemics and environmental pollution in livestock farming has not been strictly controlled. To support for the rapid and sustainable development of agricultural sector in the coming period, the government should have more investment policies, so that the sector can develop commensurately with its advantages and available capability. Therefore, in the coming period, Vietnam should focus on implementing a number of key recommendations as the followings:

*Support for product sales and market development*: The domestic market need to be restructured. The wholesale and retail system need to be developed with more emphasis on market development in remote and minor ethnic areas to encourage the development of social enterprises and ensure the benefits of the direct producers. For export markets, traditional markets should be maintained and develop new markets by focusing on building product's brand name, improving product's quality, reducing costs to increase the competitiveness. Investigations, surveys, market research of agricultural, forestry and aquatic products need to be done to capture consumer preferences, product structure, pricing, and trading practices of different markets. A team of experts who are capable of analysis, research, and market forecasts need to be established to give advise and propose effective policies. The role of industrial associations in the providing of information

and uniform implementation of the development strategy for production, business collaboration, negotiating and signing contracts need to be improved.

*Support and improve the efficiency of capital use*: Funding sources need to be diversified to continue to invest stronger in development of economic infrastructure and rural society. There must be policies for enterprises to participate in business - affiliate to - farmers model to get average and long-term loans and with preferential interest rates to implement the affiliate model. Establishment of the fund to support farmers in production and post-harvest technology (firstly rice products) need to researched to develop production yeild and reduce post-harvest losses. Investment funds should be used for right objectives, right purpose and effectivenes.

*Promote applications of science and technology in agriculture:* Apply science and technology in agriculture production: Research and application of science and technology must be promoted; especially development of the research and transfer of science and technology to improve the quality of seeds and livestock, the ability to prevent and overcome the disease to plants and animals, the productivity, quality, efficiency and competitiveness of agricultural products. The application of biotechnology and the construction of high-tech agricultural zones are also essential. The encouragement and establishment of favorable conditions for enterprises and cooperative organizatios need to be developed to invest in the preservation and processing of agricultural, forestrial, and seafood products.

*Promote training and development of human resources*: There must be regimes, remuneration policy to attract scientists in the field of high technology to work in agriculture sector, encourage young and high-qualified staffs to work in rural areas. The training and retraining of staffs working on building a new countryside also need to be focused, especially the staffs in direct workforce implemented at the grassroots level. Vocational training for rural workers need to be organized to be suitable for planning structure and economic development plans of each local region and demand, and tied to job creation. The quality of vocational training need to be improved, especially for remote areas, mountainous areas and areas with socio - economic difficulties and extremely difficult areas.

*Strengthen estabilshment and development of associated models*: The summary, innovation and building economic models and forms of efficient organizing production in rural areas need to be conducted. The links among four stakeholders and closed production chain from input to output need to be promoted. There are policies to encourage the development of collaborations between farmers and businesses, cooperatives, scientific organizations, industrial associations and product consuming markets in order to support the development of family farms, farms with appropriate scale, and large-scale commodity production. There is also a need to establish modern forms of production, trading and professional orgaanization; to develop economic cooperations, vertical integration of production, processing and trading of agricultural products; to link agriculture with industry and urban economy.

In the longer term the agricultural sector requires a comprehensive development strategy, improve production, processing and consumption of products of the sector towards sustainable development and especially to have the necessary preparation and activeness to face with the requirements of international integration process.

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# NHỮNG VẤN ĐỀ ĐẶT RA ĐỐI VỚI NÔNG NGHIỆP VIỆT NAM SAU 30 NĂM ĐỔI MỚI

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## TÓM TẮT

Bài viết sử dụng nguồn số liệu thứ cấp thu thập được từ Tổng cục Thống kê nhằm nêu lên thực trạng ngành nông nghiệp Việt Nam, cụ thể là đóng góp của ngành nông nghiệp vào tăng trưởng kinh tế và GDP của Việt Nam, giá trị kim ngạch xuất khẩu của lĩnh vực nông nghiệp trong tổng giá trị kim ngạch xuất khẩu của Việt Nam, năng suất lao động của ngành nông nghiệp và vốn đầu tư vào lĩnh vực nông nghiệp. Bên cạnh những kết quả đã đạt được như ngành nông nghiệp có tốc độ tăng trưởng ổn định, đóng góp vào sự tăng trưởng của nền kinh tế; đạt giá trị kim ngạch xuất khẩu cao; tạo được nhiều công ăn việc làm; góp phần chuyển dịch cơ cấu kinh tế, sản phẩm nông nghiệp có giá trị gia tăng cao, ngành nông nghiệp hiện đang gặp nhiều vấn đề thách thức như năng suất lao động của ngành thấp, vốn đầu tư vào lĩnh vực nông nghiệp tuy tăng nhanh qua các năm nhưng hiệu quả sử dụng vốn chưa cao, giá trị đóng góp của ngành vào tăng trưởng kinh tế có xu hướng tăng chậm, tốc độ tăng trưởng của ngành còn thấp, quy mô sản xuất nhỏ lẻ, vấn đề về dịch bệnh, an toàn vệ sinh dịch tễ, an toàn thực phẩm, ô nhiễm môi trường trong trồng trọt và chăn nuôi vẫn chưa được kiểm soát… Trên cơ sở đó, bài viết đề xuất một số kiến nghị như hỗ trợ tiêu thụ sản phẩm và phát triển thị trường; hỗ trợ và nâng cao hiệu quả sử dụng vốn; ứng dụng khoa học công nghệ; đào tạo và phát triển nguồn nhân lực; phát triển các mô hình liên kết nhằm góp phần hạn chế những thách thức và phát triển ngành nông nghiệp trong thời gian tới.

**Từ khóa: Năng suất lao động nông nghiệp, nông nghiệp Việt Nam, sản phẩm nông nghiệp, vốn đầu tư cho nông nghiệp, xuất khẩu nông sản.**

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