



## SUMMARY REPORT

# STATUS OF INDUSTRIAL PROJECTS IMPLEMENTATION IN VIETNAM

QUARTER IV / 2024

*\* The data in this report is updated as of November 30, 2024*

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Colorbond® Steel

# I. ECONOMIC & SOCIAL SITUATION IN NOVEMBER 2024

## 1. Gross Domestic Product Growth – GDP Growth

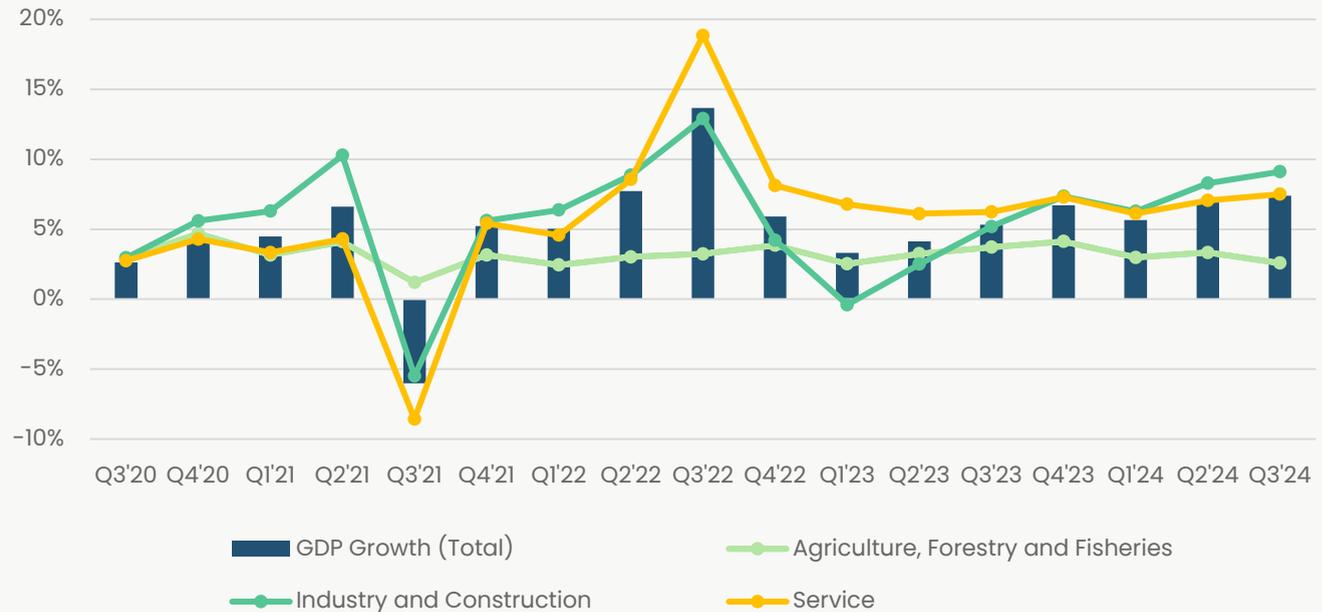


*Vietnam's economy is a bright spot amid a turbulent global landscape, with expectations of meeting the government's goals for 2024.*

GDP Vietnam's GDP in Quarter III of 2024 increased by 7.4% compared to the same period in 2023. In the first 9 months of 2024, GDP grew by 6.82%. These are noteworthy figures, despite the economy being heavily impacted by Typhoon Yagi and the global economic challenges, such as inflation and high interest rates. The economic and social situation in the first 11 months of 2024 has maintained a positive trend, with many sectors and industries achieving significant results, contributing to overall economic growth for the year.

In particular, the industrial and construction sectors experienced the strongest growth, with a 9.11% increase in Quarter III of 2024 and an 8.19% growth in the first 9 months of 2024 compared to the same period in 2023. This reflects a strong recovery in production and business activities in Vietnam following the impacts of the Covid-19 pandemic.

**GDP Growth by Sector and by Quarter, 2020 – 2024**



\* Source: GSO

Overall, in the first 11 months of 2024, Vietnam's economy still faced many difficulties and challenges. The main reasons were the continued complex developments in the world, with intense strategic competition, escalating military conflicts, and slow global economic recovery. However, Vietnam has maintained its position as a bright spot in the Asian region, thanks to flexible monetary policies and strong fiscal measures from the Government.

With the current growth rate, Standard Chartered and HSBC forecast that Vietnam's GDP growth for the entire year of 2024 could reach 6.8% and 7%, respectively, with expectations of meeting the Government's target.

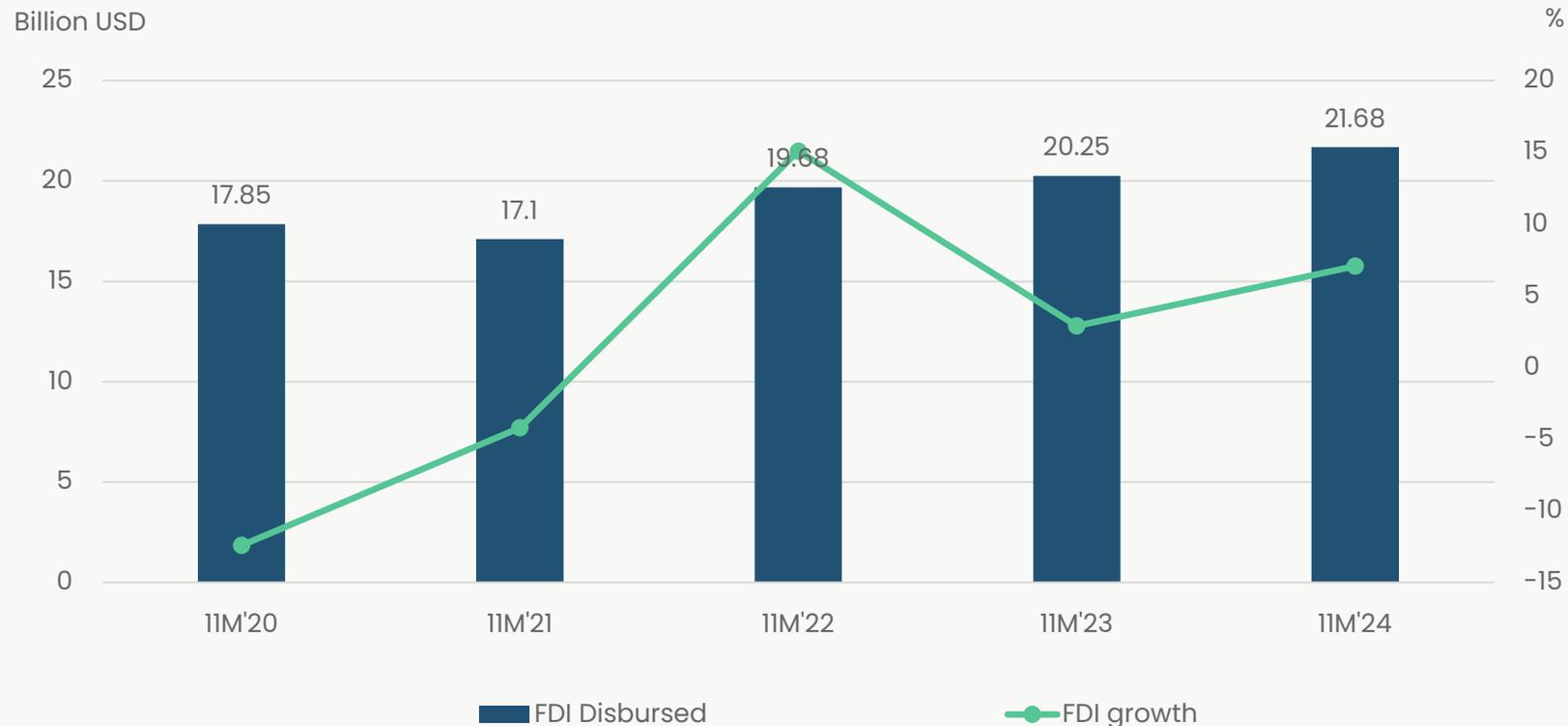
## 2. Foreign Direct Investment Attraction – FDI



***FDI in Vietnam continues to maintain its attractiveness to investors, demonstrating a positive outlook despite the global decline in capital flows.***

Foreign direct investment attraction in Vietnam continues to be a standout feature in the country's economic landscape. In the first 11 months of 2024, FDI inflows reached 31.38 billion USD, placing Vietnam among the top 15 developing countries with the largest FDI flows in the world. Foreign investment disbursed in Vietnam totaled 21.68 billion USD, the highest level since before the COVID-19 pandemic, marking the third consecutive year of record-breaking figures. The FDI growth rate in first 11 months reached 7.1% YoY, maintaining a strong momentum, which indicates that Vietnam is still on the right growth trajectory.

**FDI Disbursed Capital in the first 11 months, 2020 – 2024**

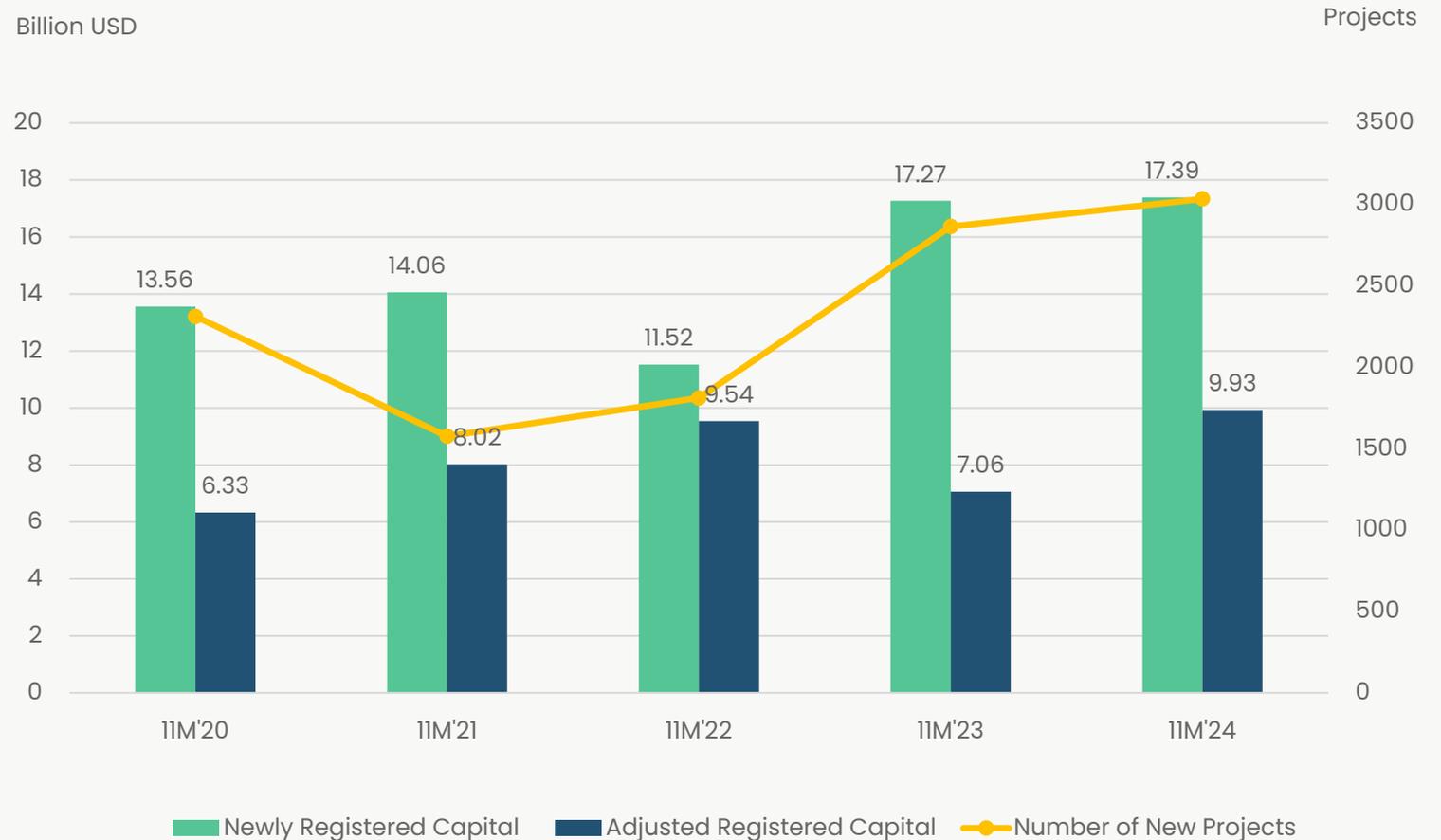


\* Source: GSO

According to the report from the General Statistics Office, in the first 11 months of 2024, Vietnam registered 3,035 new FDI projects, with a total registered capital of 17.39 billion USD. Compared to the same period in 2023, the number of projects increased by 1.6%, and the registered capital grew by 0.7%. Although there wasn't strong growth, these figures still indicate that Vietnam's economy continues to maintain its attractiveness to foreign investors.

Regarding adjusted FDI registration, the total additional investment capital reached 9.93 billion USD, marking a 40.7% increase compared to the same period last year. The significant rise in adjusted FDI capital indicates that investors continue to have confidence in Vietnam's economy as an important destination and are expanding the scale of their investment projects, even as global and regional investment flows are reported to be declining.

### Newly Registered FDI Capital, Adjusted Capital, and Number of New Projects in 11 months, 2020 - 2024



\* Source: GSO

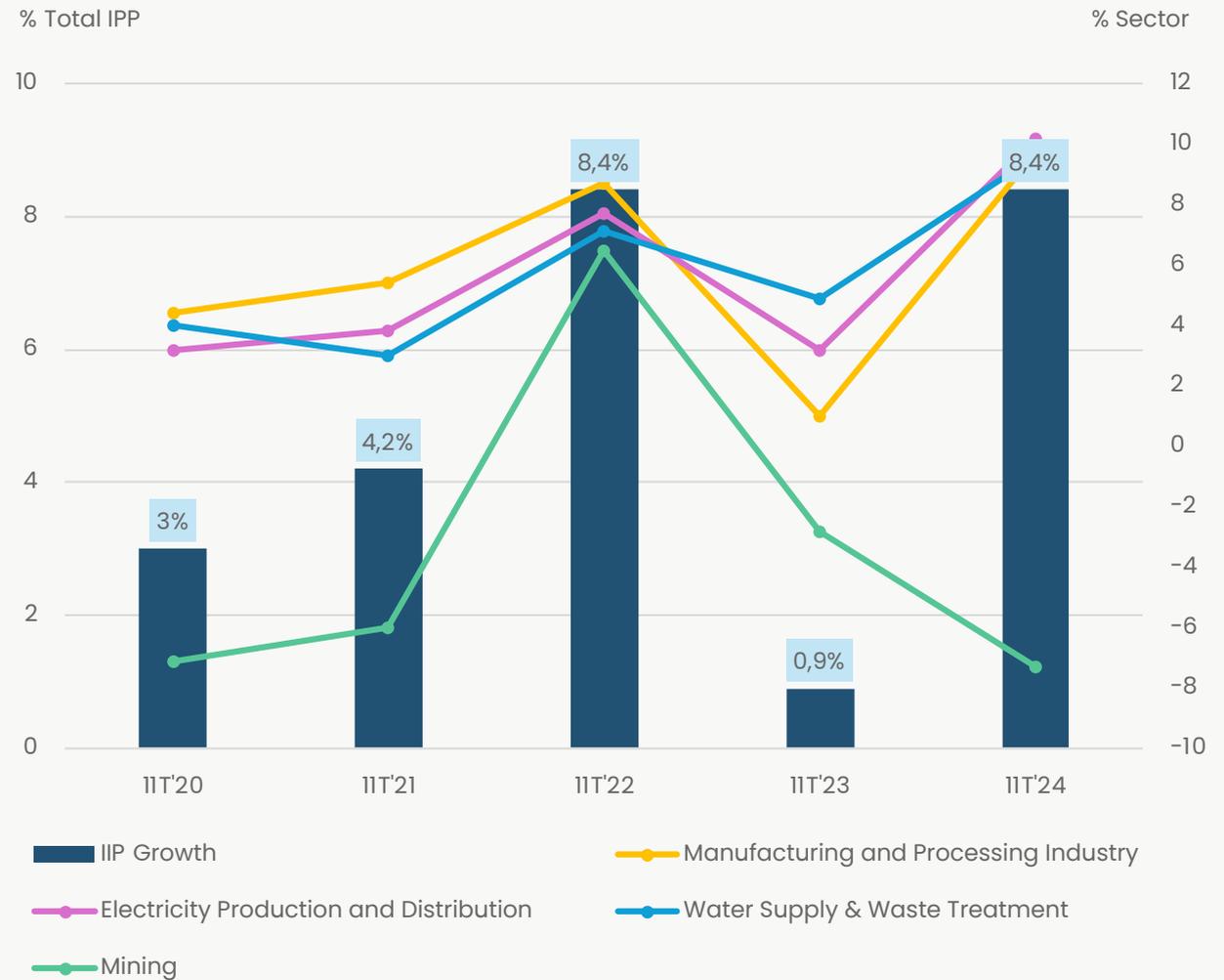
### 3. Industrial Production Index – IIP and Purchasing Managers' Index – PMI



*IIP shows a positive recovery across all sectors, while PMI continues to improve two months after Typhoon Yagi.*

The Industrial Production Index (IIP) for November 2024 is estimated to have increased by around 2.3% compared to the previous month. For the first 11 months of 2024, the IIP is estimated to have grown strongly by 8.4% compared to the same period last year (2023 saw only a 0.9% increase). Notably, the manufacturing sector, the production and distribution of electricity, and the water supply, waste management, and wastewater treatment sectors all recorded significant growth rates of 9.7%, 10.2%, and 9.6%, respectively. The only sector to decline was mining, which decreased by 7.3%, contributing to a 1.2 percentage point reduction in the overall industrial growth rate. Overall, the comprehensive recovery across production sectors, especially in manufacturing, signals positive developments in the health of the industrial sector.

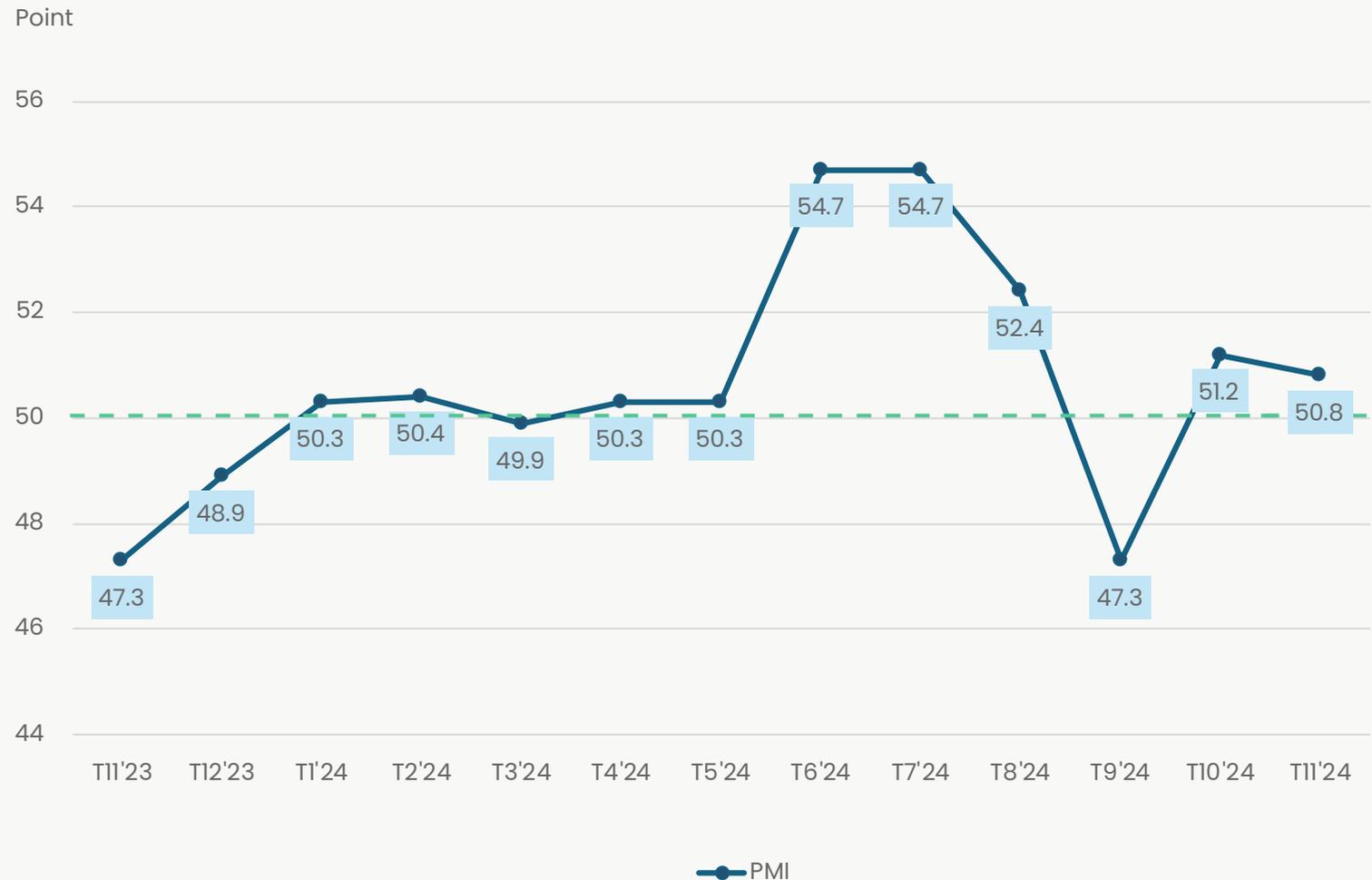
**IIP Growth in the first 11 months, 2020 – 2024**



\* Source: GSO

Regarding the Purchasing Managers' Index (PMI), Vietnam's manufacturing sector continued to remain above the 50-point mark in November 2024, reflecting an ongoing improvement in business conditions for the second consecutive month after being impacted by Typhoon Yagi in September. However, the PMI of 50.8 in November was still lower than the 51.2 in October. This indicates that while Vietnam's manufacturing sector continued to grow, the pace of improvement in business conditions slowed compared to the previous month, reflecting a relatively modest recovery. Output and the number of new orders increased at a slow pace due to weak international demand, which reduced the growth momentum of orders. Employment continued to decline as companies cut costs, resulting in a continued increase in backlog work. Input costs rose slightly, leading to a modest increase in output prices.

**Monthly Purchasing Managers' Index (PMI), 2023 - 2024**



\* Source: S&P Global

## 4. Import and Export Situation



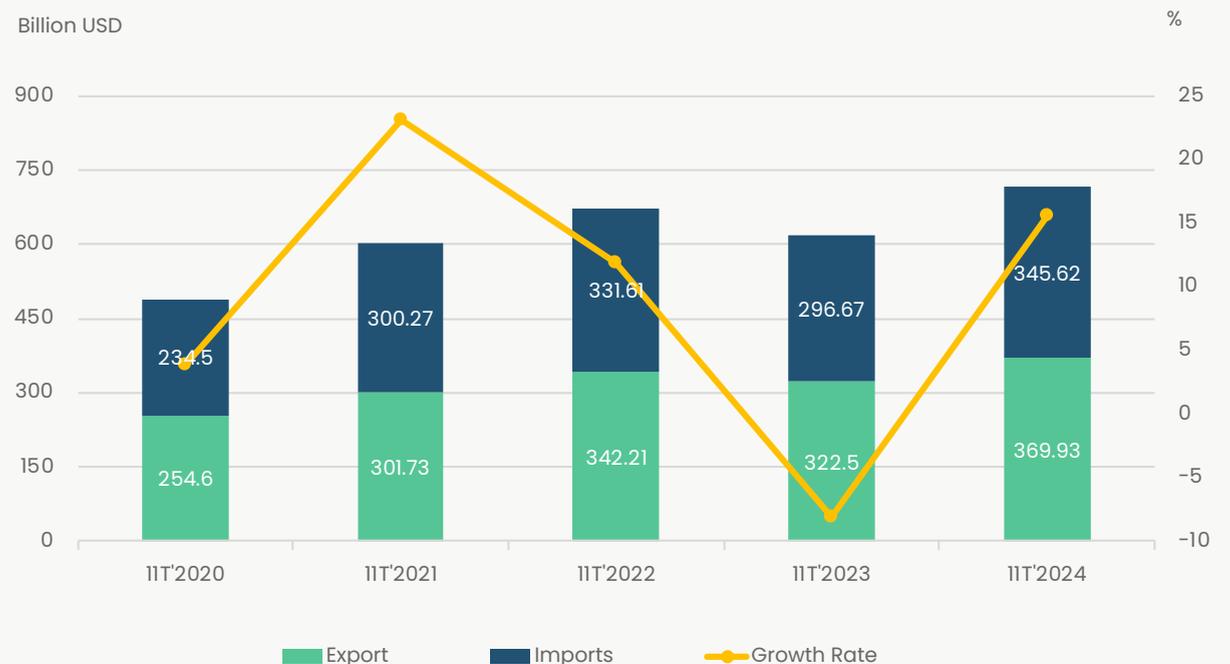
**The import and export turnover in the first 11 months of the year has experienced strong growth, with expectations that the total for 2024 will reach the highest record ever.**

According to the General Statistics Office, in November 2024, Vietnam's preliminary export-import turnover reached 66.4 billion USD, a decrease of 4.1% compared to October. However, in the first 11 months of 2024, the total export-import turnover of Vietnam rebounded strongly, reaching 715.55 billion USD, an increase of 15.4% compared to the same period last year. Of this, exports grew by 14.4% and imports increased by 16.4%. The higher growth in imports compared to exports indicates that businesses are ramping up preparations for production plans for the end of 2024 and the New Year 2025.

In just the first 11 months of 2024, Vietnam's export turnover reached 369.93 billion USD, surpassing the total of 355.5 billion USD for the entire year of 2023. The trade surplus reached 24.31 billion USD, raising expectations that the total export-import turnover for the year will reach 800 billion USD, the highest ever. This not only helps drive economic growth but also demonstrates that Vietnam's position in the international market is being strengthened.

In the FDI sector (including crude oil), export turnover amounted to 266.1 billion USD, a 12.4% increase compared to the same period in 2023, while the domestic economic sector (DDI) reached 103.9 billion USD, showing stronger growth of 20%. On the import side, FDI imports reached 219.57 billion USD, an increase of 15.2%, while DDI imports amounted to 126.05 billion USD, up by 18.5%. The export-import situation by sector shows that the DDI sector continues to grow stronger than the FDI sector.

**Total Export-Import Turnover in the first 11 months, 2020 – 2024**



\* Source: GSO

### Main Import and Export Items in the first 11 months of 2024

In the first 11 months of 2024, the top five imported items by value in Vietnam were electronics, computers and components; machinery, equipment, tools, and spare parts; fabrics; plastics; and steel. Meanwhile, the top five export items leading Vietnam's exports were electronics, computers and components; machinery, equipment, tools, and spare parts; mobile phones and components; textiles and garments; and footwear.

It can be observed that the leading export items are largely composed of raw materials sourced from the top imported items. This reflects the fact that key export-oriented industries in Vietnam still depend somewhat on importing raw materials from abroad.

## 5. Situation of Enterprises in the Manufacturing and Processing Industry and Construction Sector



**Enterprises in the manufacturing and construction sectors are facing numerous difficulties and challenges.**

In the first 11 months of 2024, Vietnam's manufacturing sector recorded a modest increase of 1.8% in the number of newly registered businesses, while the number of businesses ceasing operations and dissolving remained high, with increases of 14.5% and 18.1%, respectively, compared to the same period in 2023. This unfavorable situation can be attributed to challenges such as order shortages, access to capital, rising input costs, and supply chain disruptions caused by recent geopolitical instability.

In the construction sector, the number of newly registered businesses decreased by 7.2% compared to the same period in 2023. The number of businesses temporarily suspending operations and dissolving continued to rise, with increases of 10.5% and 10%, respectively. This reflects difficulties in accessing new projects, rising material costs, and challenges in the legal environment.

However, the number of businesses resuming operations in both the manufacturing and construction sectors saw a significant increase, at 26.9% and 27.2%, respectively. Positive government support has also played a role in helping businesses overcome difficulties and facilitating their participation in production activities.

**Business situation in the Manufacturing and Construction sectors, in first 11 months of 2024**



\* Source: GSO

## II. SITUATION OF NEWLY REGISTERED INDUSTRIAL PROJECTS IN Q4/2024

*The analysis is based on data from newly registered Foreign Direct Investment (FDI) projects in the following sectors: manufacturing, transportation and warehousing, agriculture, production and distribution of electricity, gas, water, and air conditioning, as well as construction projects that involve leasing factories or industrial land.*

## 1. Overview of Investment Attraction Situation



*The attraction of newly registered FDI in various sectors during Q4/2024 and the entire year of 2024 has shown a significant decline.*

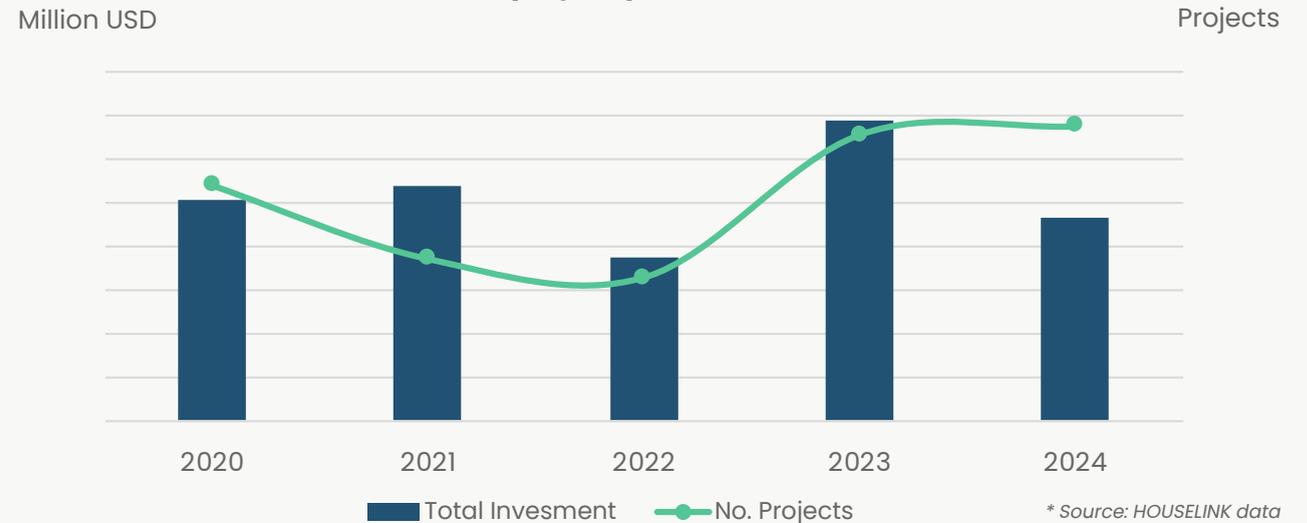
Although Vietnam's overall FDI attraction has seen growth in the first 11 months of 2024, a deeper analysis of newly registered FDI projects involving factory leasing or industrial land leasing reveals a different picture. Q4/2024 witnessed a sharp decline in both the number of projects and total investment. Specifically, the total investment in this period dropped by 68.7%, less than one-third of the same period last year. Compared to Q3/2024, the number of projects also decreased significantly (down by 30%), although the total investment showed a notable improvement of 54%. This indicates that the scale of FDI projects attracted in Q4/2024 is considerably larger than in the previous quarter.

For the entire year of 2024, the number of projects reached the highest level in the past five years, increasing by 3% YoY. However, in terms of total investment, the data shows a significant decline (down 32% compared to the same period last year), and it is only higher than the total investment in 2022.

**Situation of FDI project attraction by quarter, 2022 - 2024**



**Situation of FDI project attraction, 2020 - 2024**

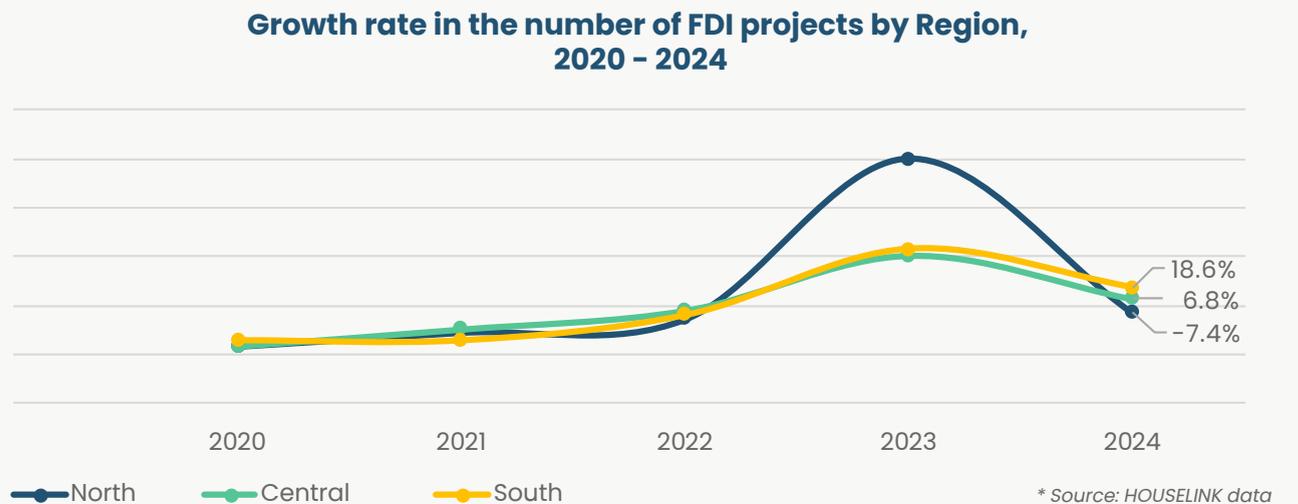
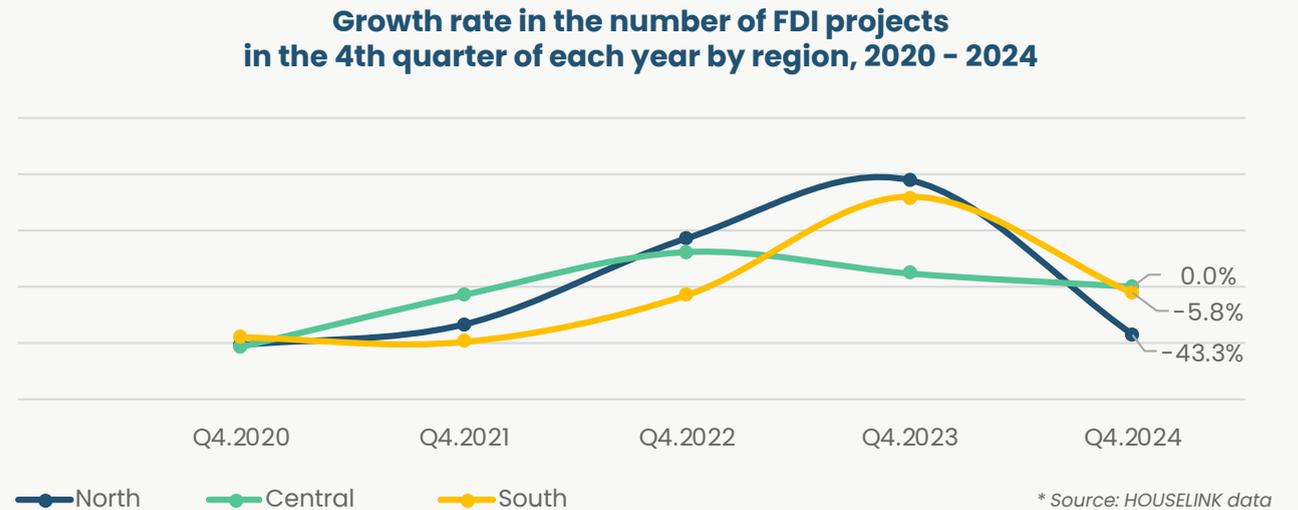
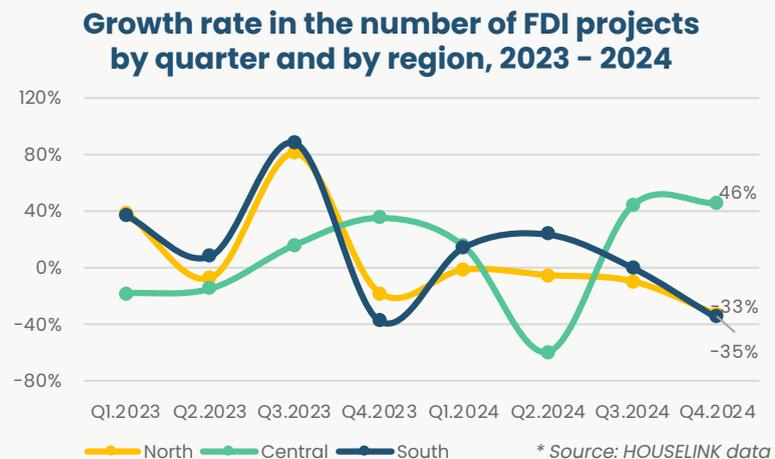




**The North remains the focal point for attracting investment projects, although it has cooled down, while the South has started to emerge.**

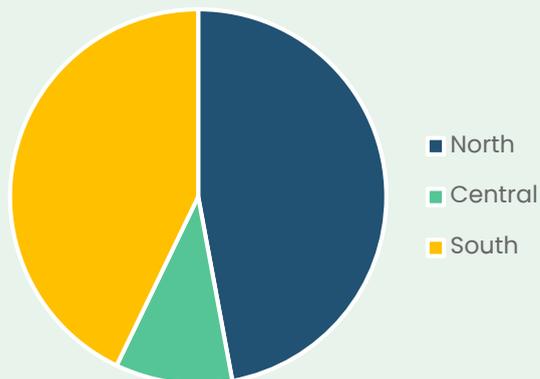
Compared to Q4/2023, the FDI investment in factory leasing and industrial land leasing in Vietnam in Q4/2024 is quite bleak. None of the three regions experienced growth in the number of projects, with the North seeing a decrease of 43.3%, the Central region down by 5.8%, and the South unchanged (0%). For the entire year of 2024, the North decreased by 7.4%, the Central region increased by 6.8%, and the South continued to see significant growth at 18.6%. Overall, the decline in the North after a strong performance in 2023 reflects a cooling in the growth rate, while the South emerged as the region with stronger growth in 2024.

In terms of quarterly growth, the FDI project numbers in the North and South saw a sharp decline in Q4/2024 compared to Q3/2024, with the North and South decreasing by 33% and 35%, respectively. In contrast, the Central region recorded a strong growth rate of 46%.

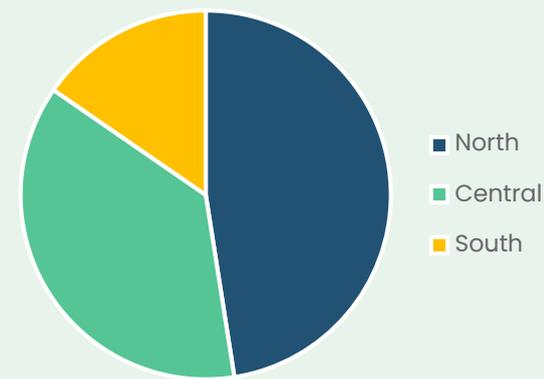


However, the North still accounts for the largest share in both the number of projects and the total investment attracted in Q4/2024 and the entire year of 2024. The Central region, despite having the fewest number of projects, ranks second in total investment in Q4, thanks to a large-scale project in the textile industry by a Singaporean investor.

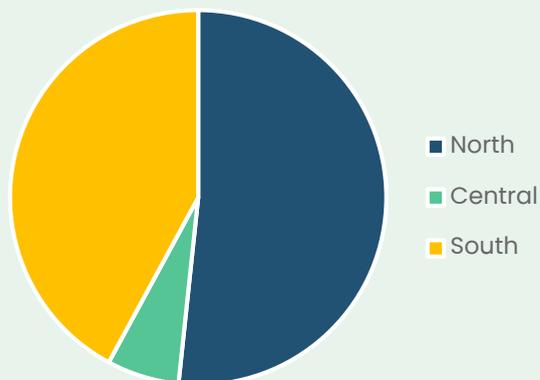
**Share of the total number of FDI projects by region in the 4th quarter of 2024**



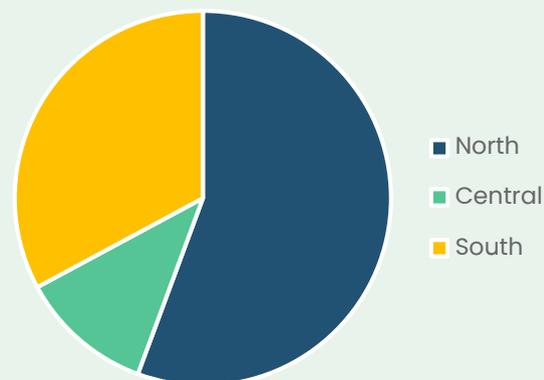
**Share of the total amount of FDI investment by region in the 4th quarter of 2024**



**Share of the total number of FDI projects by region, 2024**



**Share of the total investment by region, 2024**



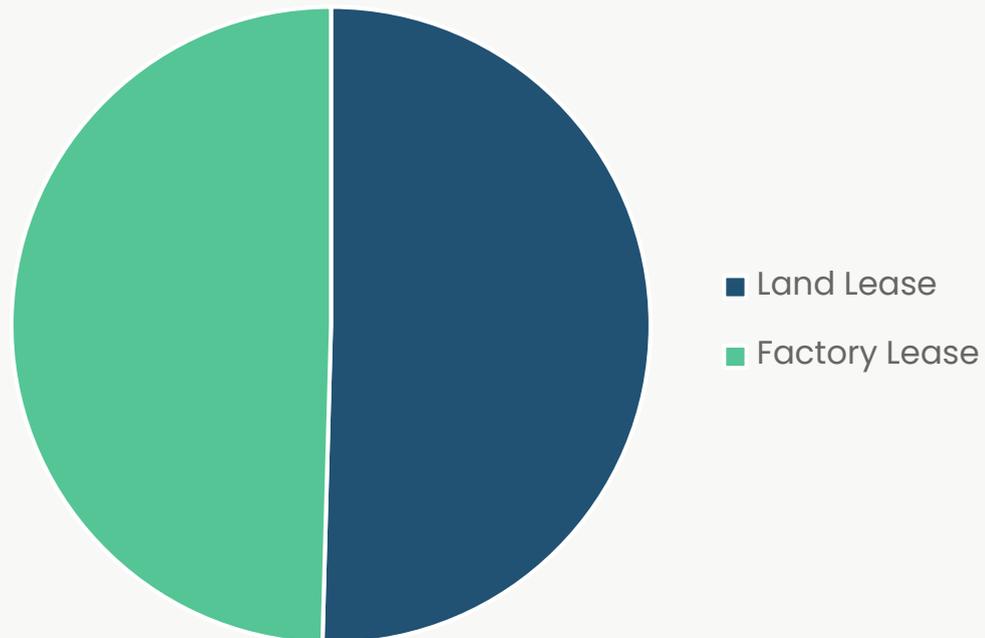
\* Source: HOUSELINK data

## 2. Analysis of Investment Projects by Investment Type



*The structure of industrial real estate types in 2024 shows a relatively balanced and even distribution between Factory Lease and Land Lease*

Share of the total number of FDI projects by type of industrial real estate, 2024



\* Source: HOUSELINK Data

## 2.1. The trend of factory lease projects

In general, the number of factory lease projects since Q1/2022 has shown an upward trend. However, the value of this number in Q4/2024 recorded a sharp decline - down more than 51% compared to the previous quarter. At the same time, the total investment also saw a significant decrease - less than half of the investment in Q4/2023.

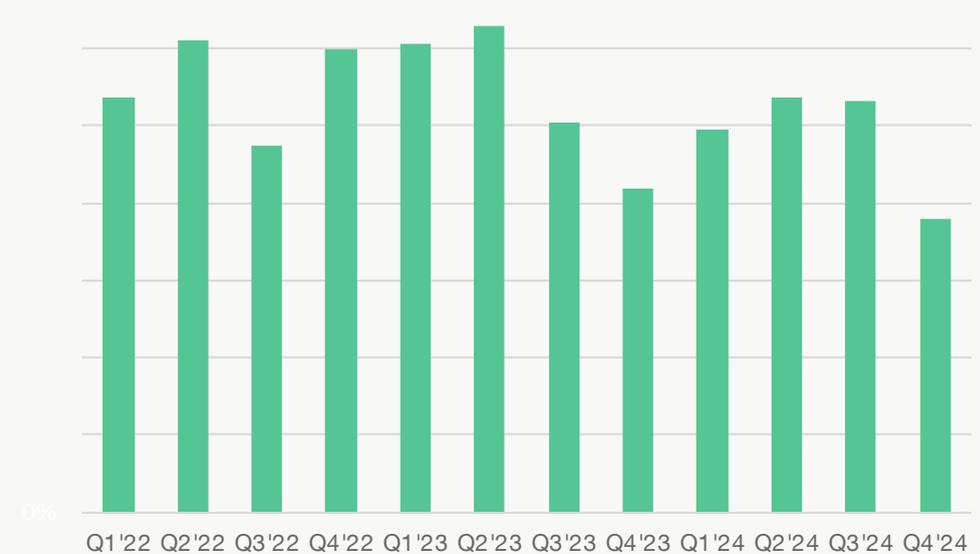
Looking at the entire year, the investment capital in factory lease projects in 2024 decreased by more than 35% YoY, but it is still higher than in 2022 in investment amount. On average, the investment capital per project reached about 2.6 million USD, which is 30% lower than in 2023. This is consistent with and follows the trend of decreasing investment scale in new FDI projects in recent times.

In terms of proportion, the number of factory lease projects compared to the total number of attracted projects shows a downward trend. In Q4/2024, this proportion sharply declined, reaching its lowest point in the past 3 years. Overall, in 2024, the average proportion of projects in this industrial category was only around 48%, a significant decrease from 54% in 2023.

**Investment situation of Factory lease projects in each quarter, 2022 - 2024**



**Share of the number of Factory lease projects in each quarter, 2022 - 2024**



\* Source: HOUSELINK Data

## 2.2. Trend of land lease projects

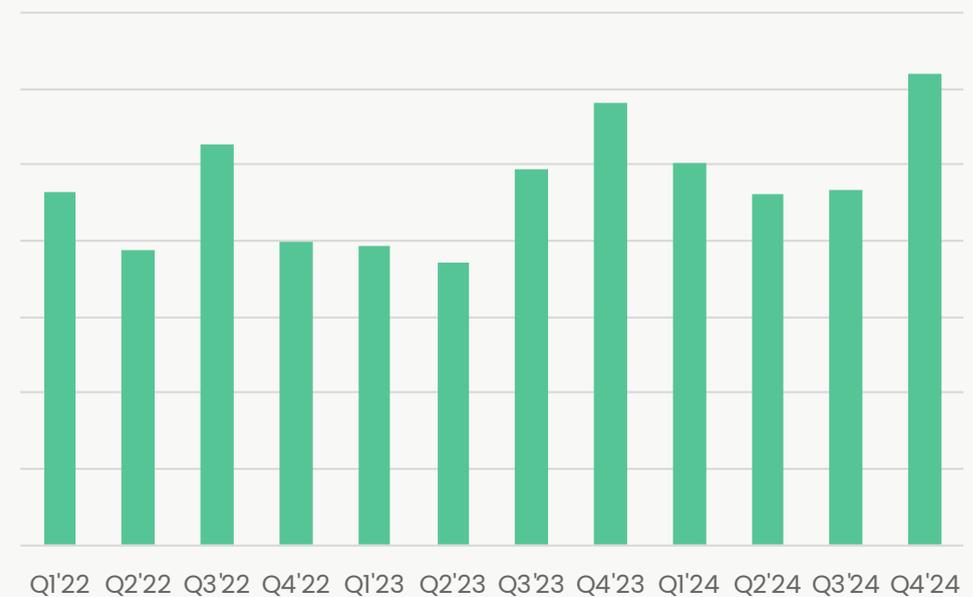
According to data from HOUSELINK, land lease projects have generally shown an upward trend since Q1 2022. Although in 2024, land lease projects experienced a decline in both the number of projects and total investment over the first three quarters, in Q4 2024, the total investment in land lease projects saw a strong recovery, increasing by 96% compared to Q3. However, this total investment is still only 43% of the same period last year.

Regarding the proportion, in contrast to the trend observed in warehouse lease projects, land lease projects are showing an upward trend. Specifically, in 2024, the average proportion of land lease projects reached its highest level throughout the study period. The same trend was observed in Q4 2024, when the proportion also reached its highest level since Q1 2022.

**Investment situation of land lease projects in each quarter, 2022 - 2024**



**Share of the number of land lease projects in each quarter, 2022 - 2024**



\* Source: HOUSELINK Data

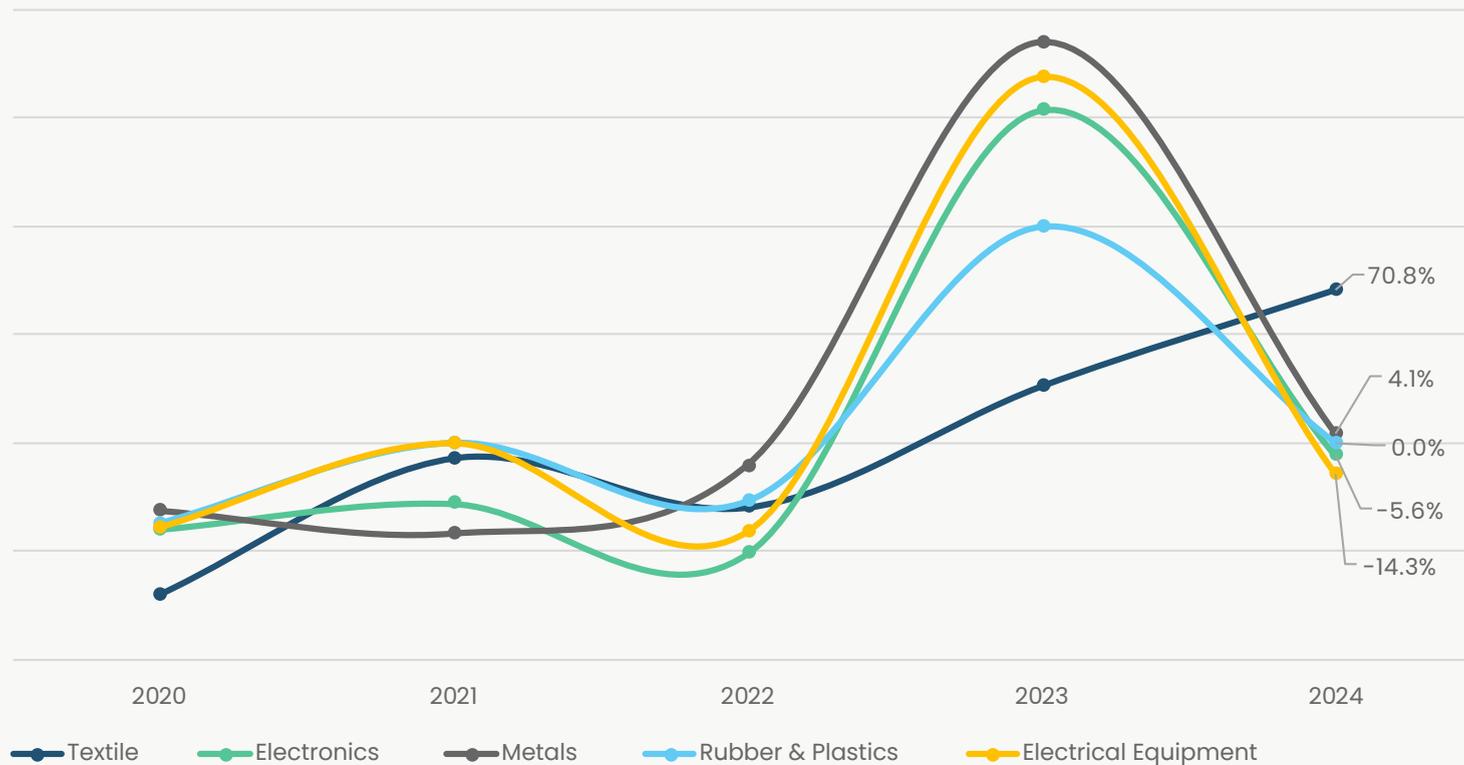
### 3. Key Sectors Attracting FDI Investment



**Metals continue to be the sector attracting the most investment, while the textile industry has shown impressive growth.**

In 2024, the metals sector continues to lead in the number of investment projects, followed by the electronics, plastic-rubber, textiles, and electrical equipment industries. After three years of decline due to the impact of the COVID-19 pandemic, the FDI growth rate rebounded strongly in 2023, with the metals, electrical equipment, electronics, and plastic-rubber sectors all achieving growth rates above 100%. Only the textile industry experienced a modest growth rate of 26.3%. However, in 2024, the textile industry recorded the strongest growth at 70.8%, while the other sectors saw either a decline or weak growth.

**Growth rate in FDI investment attraction of TOP 5 industries, 2020 - 2024**



\* Source: HOUSELINK Data

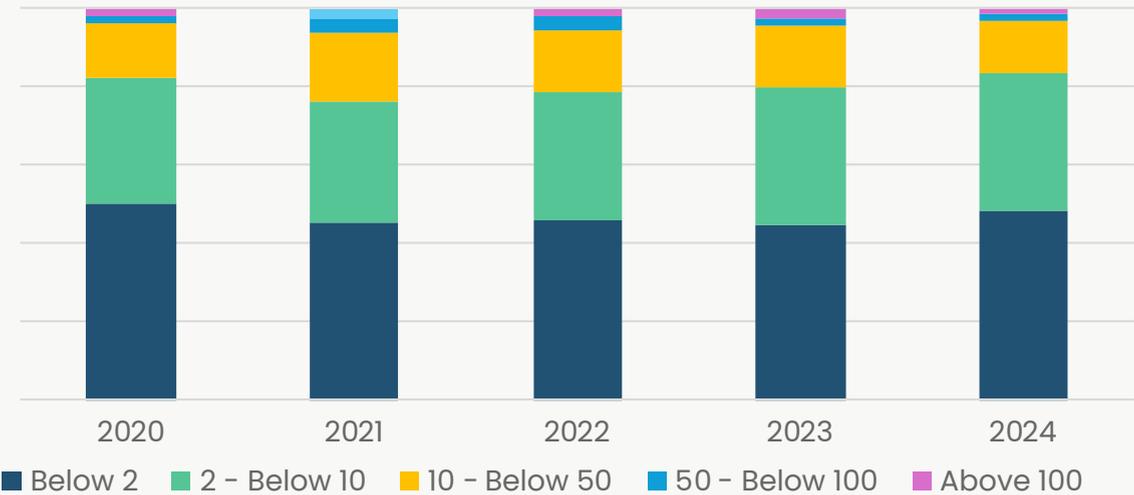
## 4. Project Investment Scale



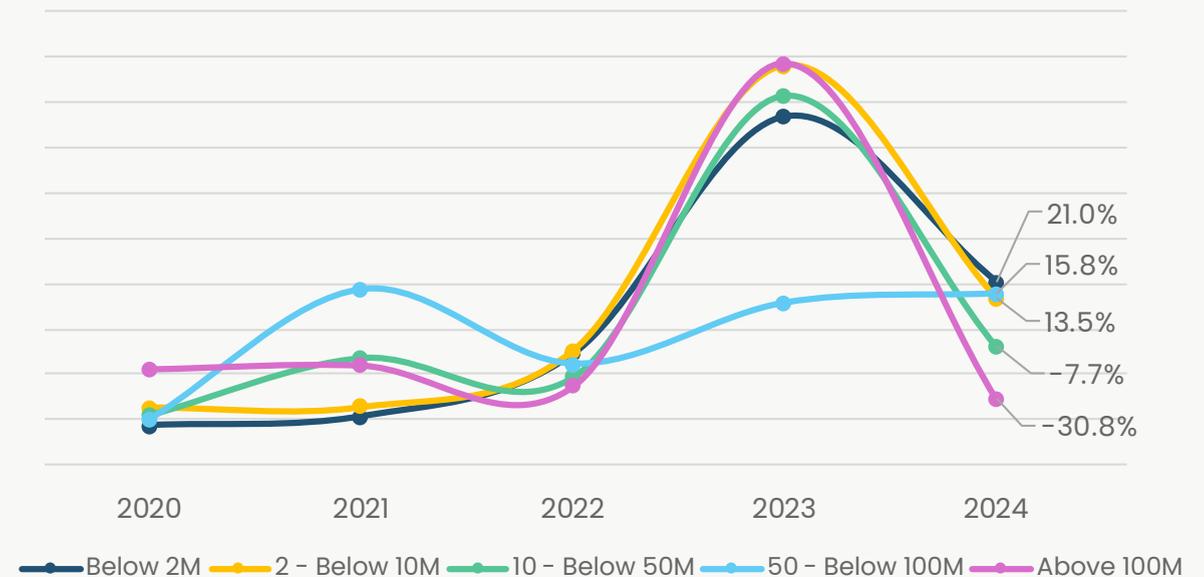
*Small-scale projects under 10 million USD still account for a large proportion, while the growth of large-scale projects over 100 million USD has sharply declined.*

Among the investment projects in Vietnam, those with an investment capital of 10 million USD or less account for a large proportion, averaging about 80% of the total number of projects, while the remaining 20% are projects with investment capital over 10 million USD. In terms of growth rate for 2024, only three segments achieved positive growth, including the segments with investment capital under 2 million USD, from 2-10 million USD, and from 50-100 million USD. Among these, the under 2 million USD segment recorded the highest growth rate at 21%. Although the number of projects in the 50-100 million USD segment is not large, its growth rate has remained stable at 15.8%, up by 4% compared to 2023. Meanwhile, other segments, despite significant growth in 2023, have experienced a sharp decline in 2024. In particular, the segment above 100 million USD, which had a growth rate of 116.7% in 2023, has dramatically decreased to a negative 30.8%.

**Situation in FDI Investment Attraction by Investment Scale Segment, 2020 - 2024**



**Growth rate in the number of FDI projects by Investment Scale Segment, 2020 - 2024**



\* Source: HOUSELINK Data

### III.

# THE SITUATION OF ATTRACTING INDUSTRIAL CONSTRUCTION PROJECTS IN 5 YEARS

*In this section, we focus on analyzing investment projects from FDI and DDI sources that lease land for construction on the HOUSELINK system (each project with an investment capital of 2 million USD or more). All projects have been verified by the HOUSELINK team for information at the time of report preparation.*

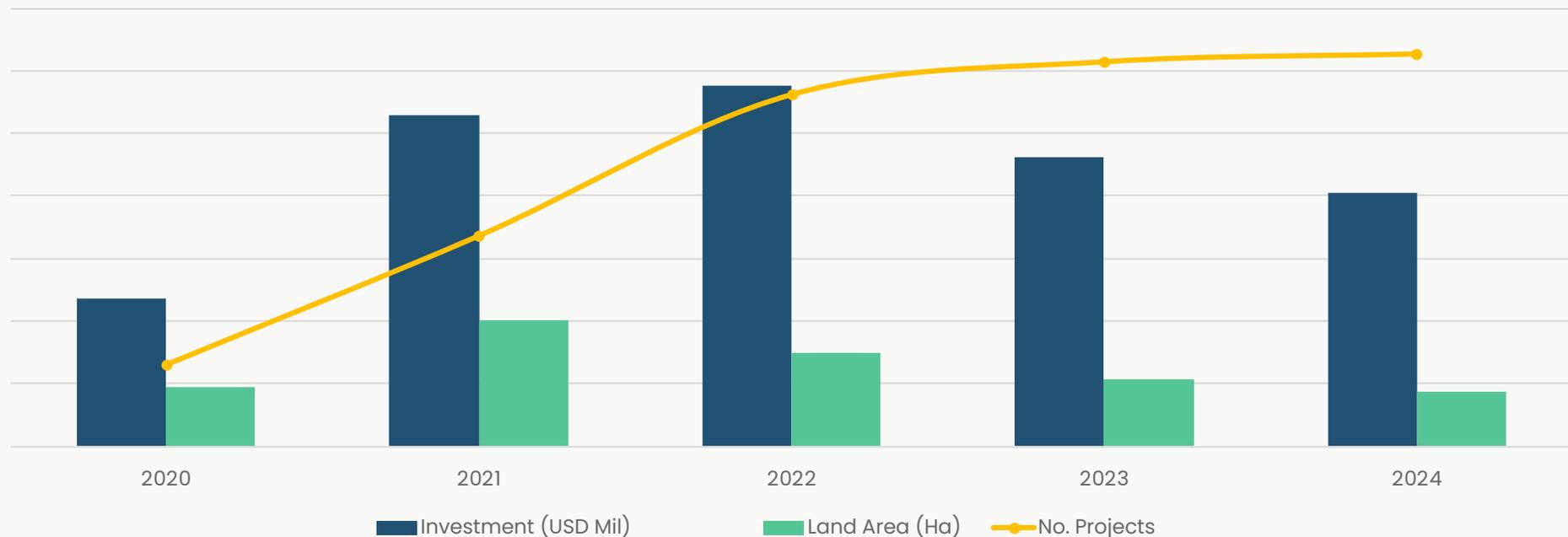
## 1. Growth Trends of Investment Projects



***The number of over-2-million-USD land lease projects has increased continuously over the years, but the growth rate has slowed down. The total investment has dropped for three consecutive years.***

Since 2020, HOUSELINK data has recorded a clear growth trend in the number of land lease projects with investment capital over 2 million USD. In 2024, the number of projects reached its highest level in the past five years; however, the growth rate has significantly slowed down since 2023. The total investment has seen a decline for the third consecutive year, with the data for the entire 2024 being 12% lower than in 2023. Additionally, the area of investment projects has decreased by 19% YoY.

**Situation of industrial projects attraction, 2020 – 2024**



\* Source: HOUSELINK data

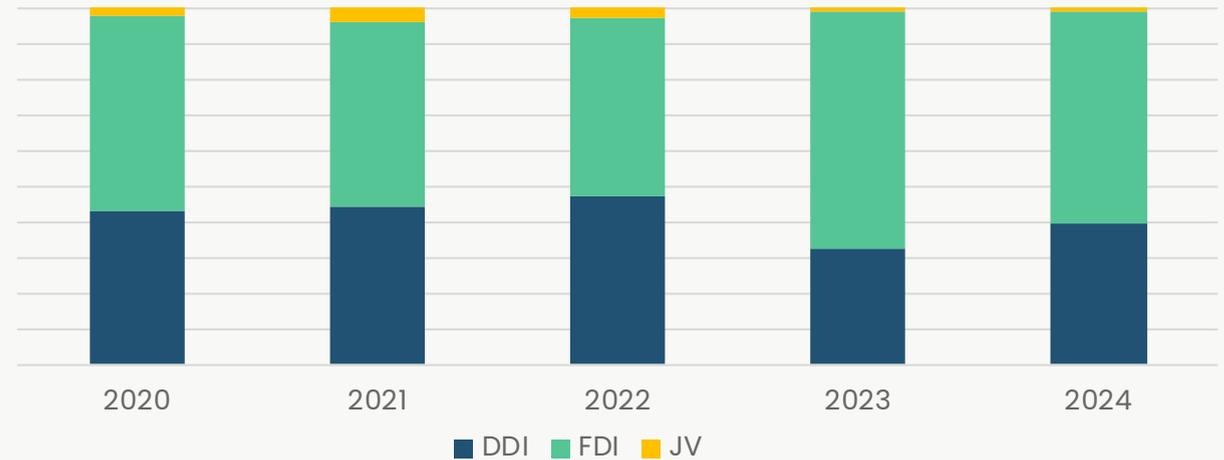
## 2. Types of Investment Capital in Projects



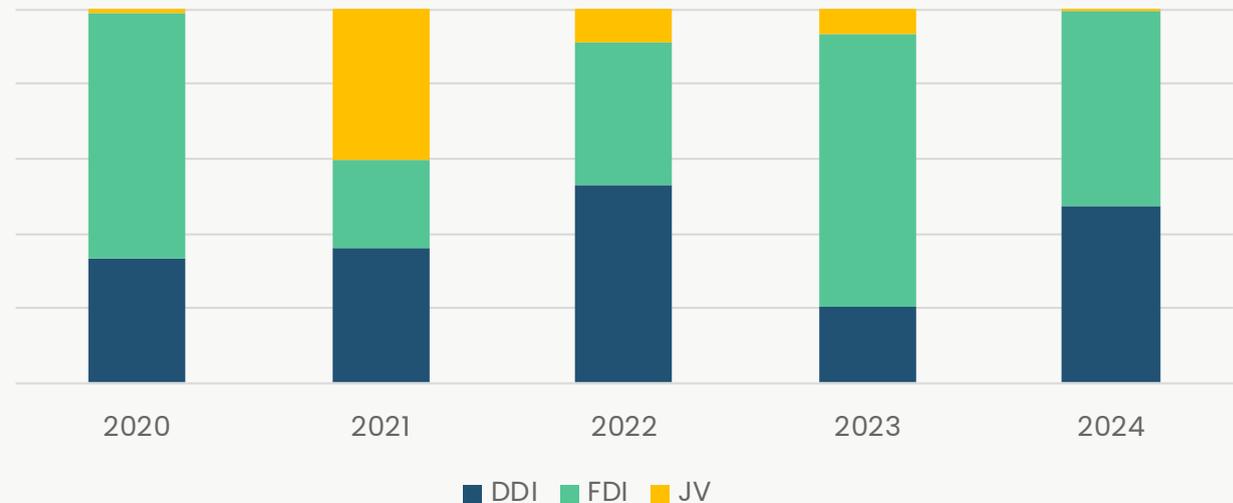
*FDI capital generally leads both in the number of projects and total investment across most years.*

According to data from the HOUSELINK system, FDI projects continue to account for the majority share in both the number of projects and total investment. In 2024, in terms of the number of projects, FDI projects make up the largest proportion, accounting for more than 59%, though this is lower compared to the previous year. In terms of total investment, FDI projects account for over half of the total capital structure, but this proportion is not as dominant as in 2023 (which was 73%). The emergence of DDI projects in Q1/2024 with significant investments in mining, metals, and energy sectors has pushed the share of DDI capital to over 47% of the total investment, marking a nearly 30% increase YoY.

**Share of the total number of industrial projects by Type of Investment, 2020 - 2024**



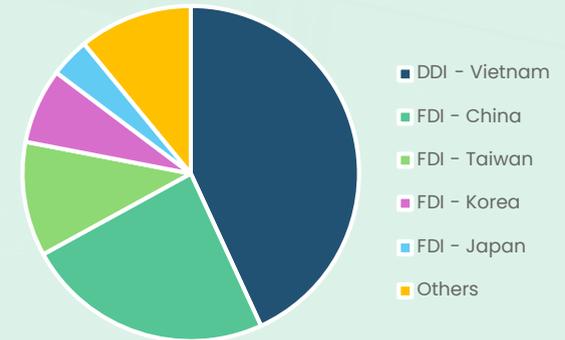
**Share of the total investment amount of industrial projects by Type of Investment, 2020 - 2024**



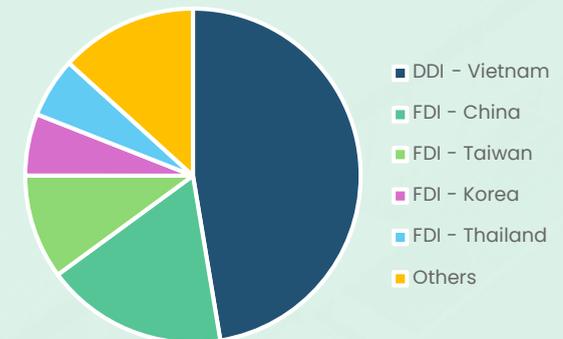
\* Source: HOUSELINK data

In terms of the origin country for investment, DDI capital is currently the largest proportion in both the number of projects and total investment in 2024. China and Taiwan are the two most influential sources of FDI, ranking second and third, respectively. In total, top 5 countries with the highest number of projects account for over 80% of the market share and nearly 90% of the total investment in Vietnam in 2024.

**Share of the total number of industrial projects by investing country, 2024**



**Share of the total investment of industrial projects by investing country, 2024**



\* Source: HOUSELINK data

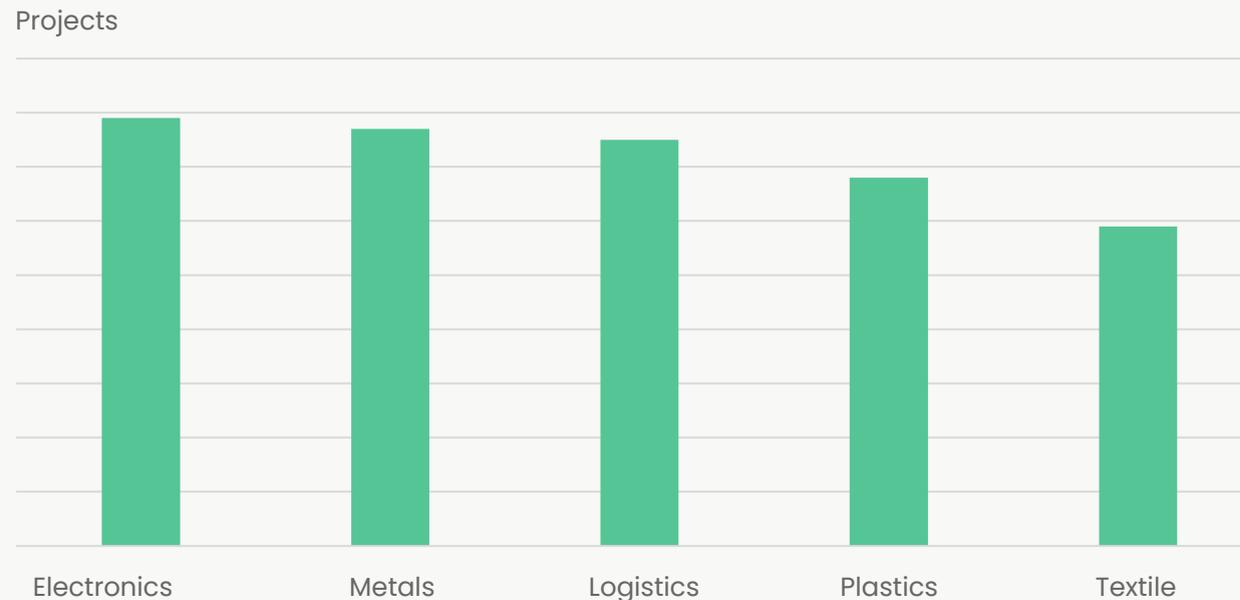
### 3. Top Sectors Attracting Investment



***Electronics, Metals, Logistics, Plastics, and Textiles are the top 5 sectors attracting the most investment in 2024.***

According to the HOUSELINK database, Electronics continues to be the sector attracting the most investment projects in 2024, followed by Metals, Logistics, Plastics, and Textiles. Overall, there is not much disparity in the number of investment projects across these sectors, indicating the diverse and stable development of various manufacturing fields, from electronics and metal materials to logistics, plastics, and textiles. This even distribution could also be a positive signal, as different sectors show development potential, contributing to the diversification of the economy and reducing dependence on certain industries.

#### TOP 5 mostly attracted industrial sectors, 2024



*\* Source: HOUSELINK data*

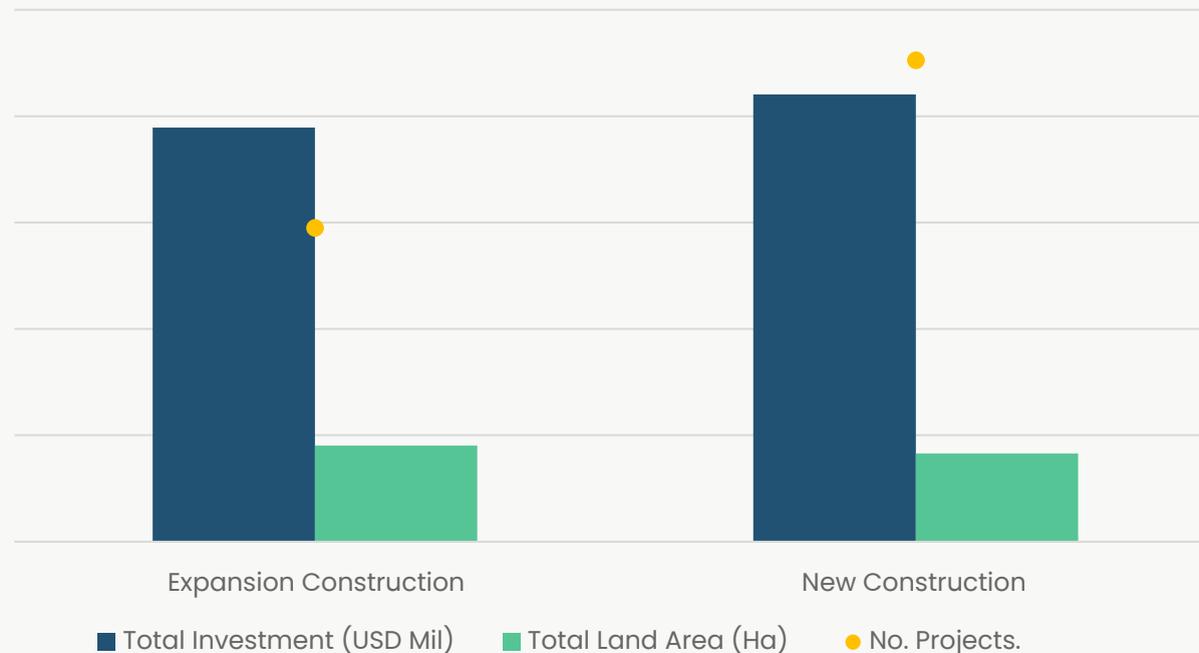
## 4. Types of Construction



***New construction is the most common type of construction in 2024, both in terms of the number of projects and total investment.***

According to the data from the HOUSELINK system, in 2024, the number of new construction projects was nearly 53% higher than expansion projects. The same trend was observed when comparing the total investment of these two types of construction, with the total investment in new construction projects being 8% higher than in expansion projects. However, in terms of area, the opposite is true, as the total area of expansion projects was about 10% larger.

### Situation of investment attraction of industrial projects by type of construction, 2024



\* Source: HOUSELINK data



## IV. OVERVIEW OF INDUSTRIAL PROJECTS UNDER CONSTRUCTION IN VIETNAM

*In this section, we focus on analyzing investment projects from FDI and DDI sources with an investment capital of 2 million USD or more, which have been verified on the HOUSELINK system and are in the process of preparation for construction (Project preparation, Design, Bidding, Selection of main contractors) based on criteria such as: Location, Project type, and Investment form.*

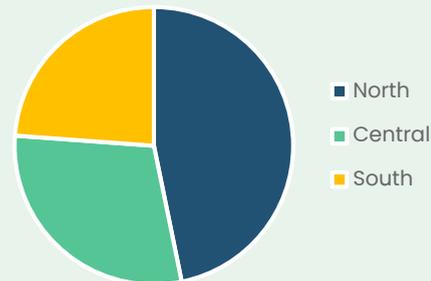
## 1. Project Location



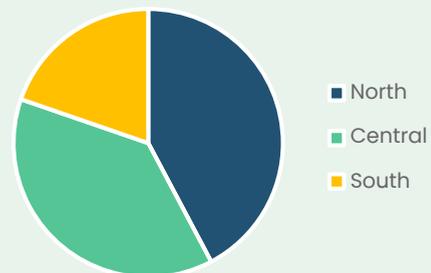
*The North still leads the country in both the number and total investment of projects under preparation.*

In 2024, projects under preparation (excluding energy sector projects) are mainly distributed in the Northern region, focusing on provinces such as Hai Duong, Bac Ninh, Hung Yen, and Hai Phong. Additionally, the Southern region also has some prominent provinces, such as Binh Duong and Long An. The favorable location for import-export trade and the completion of diverse supply chains are key factors that attract many investors to set up production in these regions of Vietnam. In the Central region, although it has the fewest number of projects in the country, the total investment in the Central region accounts for nearly 40%.

**Share of the number of investment projects to be constructed by Region, 2024**

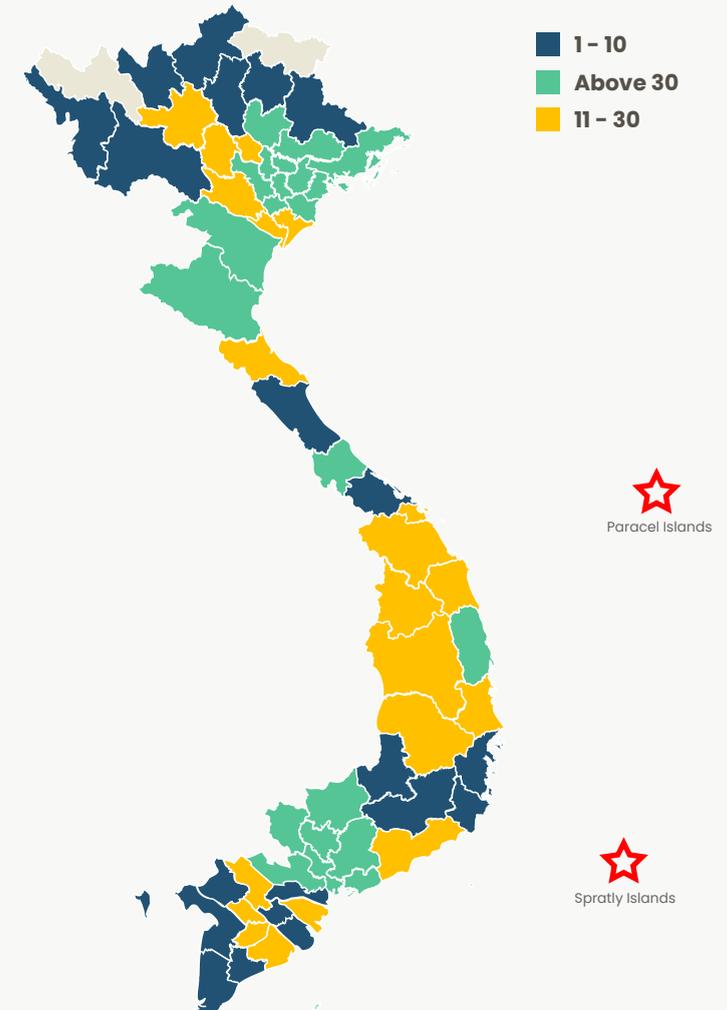


**Share of the total investment of projects about to be constructed by Region, 2024**



\* Source: HOUSELINK data

**Density map of the number of projects about to be constructed by Province**



\* Source: HOUSELINK data

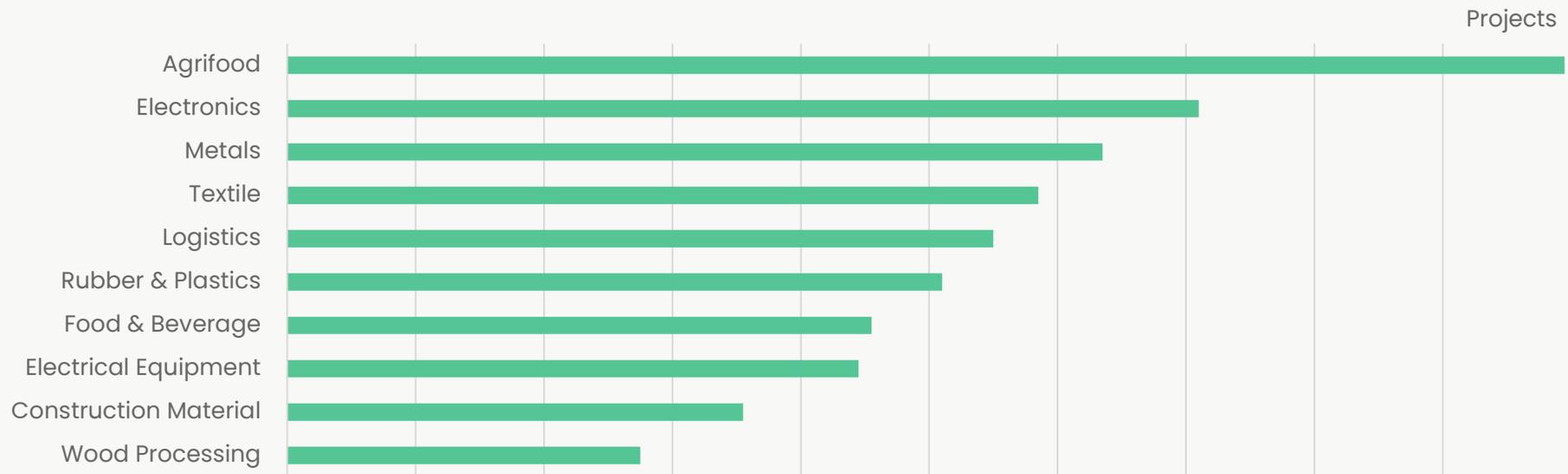
## 2. Top Sectors of Projects



***Agriculture and food, Electronics, Metals, Textiles, and Logistics are the top 5 sectors with the highest number of projects under preparation.***

According to data from HOUSELINK, Agriculture and Food is the sector with the most projects under preparation for the future, 29% higher than the Electronics sector, which ranks second. Following are the sectors of Metals, Textiles, Logistics, Plastics, F&B, Electrical Equipment, Building Materials, and Wood Processing.

**TOP 10 Sectors of projects under preparation by number of projects**



*\* Source: HOUSELINK data*

### 3. Investment Sources

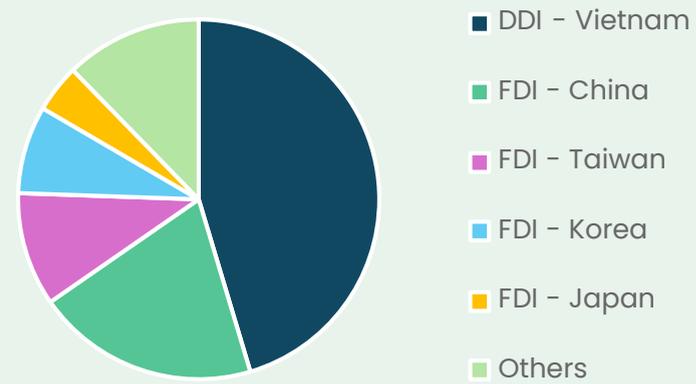


***Most of the projects under preparation have domestic investment capital.***

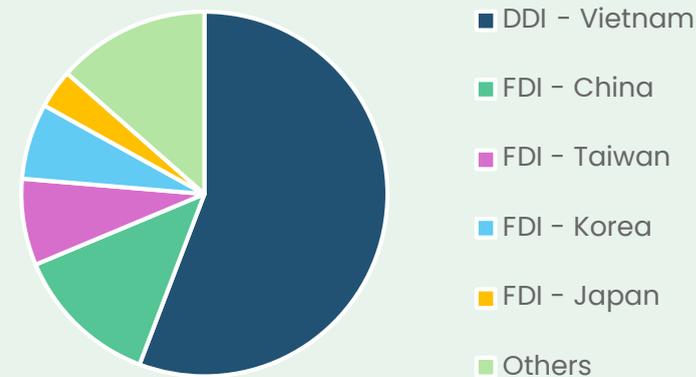
Data from the HOUSELINK system shows that projects with investment capital from Vietnam (DDI) currently lead the country in both the number of projects and total investment. In terms of project quantity, DDI capital leads with nearly half of the total number of projects under preparation, followed by China, Taiwan, and South Korea.

In terms of total investment, the proportion of investment sources corresponds to the number of projects, with DDI capital maintaining its leading position. The next countries in the top 5 for total investment are China, Taiwan, South Korea, and Japan. This highlights the attractiveness of the Vietnamese market to international investors, especially those from Asian countries. Vietnam continues to assert its position as an ideal destination for investment projects, with a stable political environment, a large workforce, competitive production costs, and increasingly improved investment incentives.

**Share of the total number of projects by Source of Capital**



**Share of the total investment of projects by Source of Capital**



*\* Source: HOUSELINK data*



# V. TOP 5 OUTSTANDING INVESTMENT PROJECTS IN Q4/2024

*(Duly Certified Investment Projects)*



TITAN BAC NINH 3 Industrial Warehouse for Lease  
**FRASERS PROPERTY**



SEMBCORP Integrated Center  
**HAI PHONG IV**



WEI XING Textile Factory  
**HUNG YEN - SUPERCAP - WEILI**



NEWSTAR Terrain Vehicle Assembly Plant  
**ODES**



KIAN JOO CAN Beverage Production Factory  
**GREENCANS**

An aerial photograph of an industrial park. The main focus is a large, modern warehouse with a white, corrugated metal roof and blue structural elements. The building is situated next to a paved parking lot with several marked spaces. In the background, there are other industrial buildings, some with green roofs, and a range of mountains under a clear blue sky. The left side of the image is partially obscured by a dark blue semi-transparent overlay containing text.

# IV. SOME OUTSTANDING INDUSTRIAL PROJECTS



## BW BAU BANG INDUSTRIAL HUB 06

Location: Binh Duong

Investor: BW Industrial (BWID)

Material: COLORBOND® steel (for wall), ZINCALUME® steel (for roof)

Contact: (+84) 28 3821 0066 – colorbond@bluescope.com.vn



## THANH BINH PHU MY WAREHOUSE

Location: Ba Ria Vung Tau

Investor: THANH BINH PHU MY JOINT STOCK COMPANY

Material: COLORBOND® steel (for roof and wall)

Contact: (+84) 28 3821 0066 – colorbond@bluescope.com.vn



## VINA KYOEI

Location: Phu My 1, Vung Tau City, Vietnam

Scale: 32,000 m<sup>2</sup> – 3,500 MT

Industry: Construction Materials

Client: Vina Kyoiei – Japan

Scope of work: Design, manufacturing, erection

Contact: +84 28 3926 0666 – Sales@atad.vn



## HOA PHAT STEEL FACTORY

Industry: Building Materials

Location: Dung Quat Economic Zone, Quang Ngai Province, Vietnam

Client: Hoa Phat Group

Main Contractor: ATAD

Scale: 144,000 m<sup>2</sup> – 63,000 ton

Contact: +84 28 3926 0666 – sales@atad.vn

Sponsors by:



**ATAD STEEL STRUCTURE CORPORATION**



**NS BLUESCOPE VIETNAM LIMITED**

## COMMITMENT

We, Department of Market Research and Analysis of HOUSELINK JSC, commit that information given in this report has been handled the most truly and correctly. We undertake to comply with the code of professional ethics at the highest level.

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