



E-Commerce Export:

A New Growth Driver for Vietnam's
Furniture and Fashion Exports

April 2026

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Contents

1. Vietnam’s global leadership in furniture and fashion exports	05
2. Vietnam’s growing advantage in e-commerce exports	06
2.1. Furniture exports: performance and e-commerce opportunity	06
2.2. Fashion exports: performance and e-commerce opportunity	07
3. How e-commerce is reshaping MSME exports in furniture and fashion	10
3.1. Why e-commerce export matters for MSME growth	10
3.2. Key export destinations: current and future outlook	14
4. Challenges facing Vietnam’s furniture and fashion MSMEs	16
4.1. Barriers to exporting via e-commerce	16
5. Targeted policy action to accelerate e-commerce export growth	21
5.1. Strengthening domestic regulatory and policy frameworks for e-commerce exports	22
5.2. Addressing export-destination barriers identified by Vietnamese MSMEs	23
6. The way forward	27
7. Appendix: Methodology and data sources	28
7.1. Access Partnership survey of MSMEs on e-commerce	28
7.2. Export value by product category in 2024 and 2029	29
7.3. Projected growth of e-commerce exports by product category from 2024 to 2029	29



E-Commerce Export: A New Growth Driver for Vietnam's Furniture and Fashion Exports



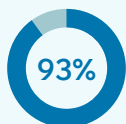
Why furniture and fashion matter for Vietnam's exports

Furniture and fashion are the backbone of Vietnam's export economy, combining a **large manufacturing base, superior craftsmanship, and growing adoption of digital tools for global trade.**¹ As two of Vietnam's largest consumer goods exports categories, these industries offer Vietnamese micro, small, and medium-sized enterprises (MSMEs) a significant opportunity for e-commerce-driven export growth.

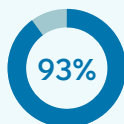
E-commerce expected to accelerate export growth for furniture and fashion products 2–5X faster than overall exports

Category	Overall export value ² , 2024, VND trillion	Overall export value, 2029, VND trillion	CAGR of overall export value, 2024–29	CAGR of e-commerce export value ³ , 2024–29
 Fashion	343	540	9%	20%
 Furniture	1,661	2,137	5%	26%

E-commerce export is transforming how Vietnamese furniture and fashion MSMEs scale globally



93% of MSMEs reported that e-commerce export is essential for their future growth





93% of MSMEs reported that engaging in e-commerce has made them more globally competitive compared to larger firms

Key Export Destinations

-  USA
-  UK
-  China

However, MSMEs are facing barriers to exporting via e-commerce today

Top barriers faced by **FURNITURE** and **FASHION** MSMEs

-  1. High costs of cross-border logistics
-  2. Navigating complex and changing regulations in export destinations

Policy actions to unlock the e-commerce export opportunity



Training sessions on product compliance and certification requirements



Government grants to subsidize logistics costs



Online resources on e-commerce exports (e.g., online courses, tools to enable exports)



Government-industry partnerships to increase awareness of export destinations

¹ Fashion items refer to apparel, footwear, and other wearable accessories. Furniture products refer to functional house-hold objects used for seating, sleeping, storage, and supportive surfaces.

² Overall export value encompasses the value of all product shipments, covering both business-to-consumer (B2C), direct-to-consumer (D2C), and business-to-business (B2B) models, which move through both e-commerce and non-e-commerce channels.

³ The expected growth rate for Vietnam's B2C e-commerce exports was derived from Access Partnership's 2025 survey of 150 furniture and 150 fashion MSMEs in Vietnam on their projected five-year growth in cross-border B2C e-commerce export sales.

Source: Access Partnership analysis; Access Partnership's survey of 150 MSMEs in Vietnam engaged in e-commerce for furniture products, and 150 MSMEs engaged in e-commerce for fashion products.

1. Vietnam's global leadership in furniture and fashion exports

Vietnam's ascent as a major global exporter is the result of sustained economic reform, growing manufacturing capability, and deeper participation in international trade. Its Đổi Mới reforms liberalized trade and connected Vietnamese manufacturing to global value chains.⁴ Moreover, a series of trade agreements expanded overseas access and encouraged multinational manufacturers to establish production in the country.⁵ As global supply chains have diversified, Vietnam has captured a growing share of global exports by leveraging its abundant natural resources such as timber, an increasingly tech-savvy workforce, competitive labor costs, and a stable policy environment.⁶

Building on this foundation, Vietnam has developed a competitive edge in furniture and fashion exports, now featuring among the top three exporters for wooden furniture and apparel globally.⁷ Industrial clusters in Bình Dương, Đồng Nai, and Bình Định provinces combine Vietnamese craftsmanship with modern manufacturing capabilities to enable Vietnam's wooden furniture exports at scale, while leading global brands such as Nike source a significant share of their footwear and apparel from the country, underscoring its strength across these segments.⁸

Vietnam's strong manufacturing base can be further leveraged through the rapid growth of e-commerce, with the country's total e-commerce gross merchandise value (GMV) growing by 18% annually in 2024.⁹

Alongside rising Internet penetration and the growing adoption of digital tools among exporting businesses, this surge positions e-commerce as the next growth frontier for Vietnam's export industries, particularly furniture and fashion.¹⁰ Advances in cross-border logistics, modular designs, and last-mile fulfilment are making online furniture exports increasingly viable, while digital platforms allow fashion producers to respond quickly to shifting global trends.¹¹ As a result, furniture and fashion have emerged as the backbone of Vietnam's export economy, powered by a large manufacturing base, superior craftsmanship, and growing adoption of digital tools for global trade. By leveraging e-commerce for exports, Vietnamese micro, small, and medium-sized enterprises (MSMEs) are well-positioned to sustain and expand Vietnam's leadership in furniture and fashion exports in the years ahead.



⁴ Vo Tri Thanh (2020), Viet Nam: Transition to a Social-Oriented Market Economy. Available at: https://www.eria.org/uploads/8_ch_4-Transition-to-Social-Oriented-Market-Economy.pdf

⁵ Sources include: World Trade Organization (n.d.), "Viet Nam." Available at: https://www.wto.org/english/thewto_e/acc_e/a1_vietnam_e.htm; Banh et al. (2024), The Future Factory of the World: Is Vietnam Ready?. Available at: <https://lkyspp.nus.edu.sg/docs/default-source/aci/acirp202417.pdf>

⁶ Sources include: BBC (2024), "Doi Moi: Vietnam's economic miracle." Available at: <https://www.bbc.com/audio/play/w3ct745y>; VieGo Global (2024), "An introduction to Vietnam wooden furniture market (Part 1)." Available at: <https://vieloglobal.com/an-introduction-to-vietnam-wooden-furniture-market-part-1/>; NIC (2023), Vietnam Innovation & Tech Investment Report 2023. Available at: https://nic.gov.vn/img/wploads/2023/04/ENG_Vietnam-Innovation-Tech-Investment-Report2023_final.pdf; MOIT (2022), "Vietnam's Timber Industry: Overview, Challenges, and Opportunities for Foreign Investors." Available at: <https://vntr.moit.gov.vn/news/vietnams-timber-industry-overview-challenges-and-opportunities-for-foreign-investors>

⁷ Fashion items refer to apparel, footwear, and other wearable accessories. Furniture products refer to functional house-hold objects used for seating, sleeping, storage, and supportive surfaces. These product categories were chosen given their importance for Vietnam's consumer goods exports and their potential to leverage e-commerce exports. The various sub-categories within both are referenced under the broader groupings of fashion and furniture unless stated otherwise. Sources include: World Trade Organization (n.d.), "Viet Nam." Available at: https://www.wto.org/english/thewto_e/acc_e/a1_vietnam_e.htm; Banh et al. (2024), The Future Factory of the World: Is Vietnam Ready?. Available at: <https://lkyspp.nus.edu.sg/docs/default-source/aci/acirp202417.pdf>

⁸ Sources include: World Bank (n.d.), "Manufacturing, value added (% of GDP) – Vietnam." Available at: <https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=VN>; WTO Center (2024), "Integration positions Vietnam as key part of global supply chain." Available at: <https://wtocenter.vn/rcep-market/27000-integration-positions-vietnam-as-key-part-of-global-supply-chain>; USDA Foreign Agricultural Service (2020), Vietnam Wood Processing Industry. Available at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Vietnam+Wood+Processing+Industry_Ho+Chi+Minh+City_Vietnam_06-11-2020

⁹ Sources include: World Bank (n.d.), "Manufacturing, value added (% of GDP) – Vietnam." Available at: <https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=VN>; WTO Center (2024), "Integration positions Vietnam as key part of global supply chain." Available at: <https://wtocenter.vn/rcep-market/27000-integration-positions-vietnam-as-key-part-of-global-supply-chain>; USDA Foreign Agricultural Service (2020), Vietnam Wood Processing Industry. Available at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Vietnam+Wood+Processing+Industry_Ho+Chi+Minh+City_Vietnam_06-11-2020

¹⁰ Sources include: World Bank (2024), "Individuals Using the Internet (% of Population) – Vietnam." Available at: <https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=VN>; OpenGov Asia (2025), "Vietnam: E-Commerce and AI Drive Digital Economy Growth." Available at: <https://opengovasia.com/vietnam-e-commerce-and-ai-drive-digital-economy-growth/?c=sg>

¹¹ Sources include: The Business Research Company (2024), E-commerce Furniture Global Market Report. Available at: <https://www.thebusinessresearchcompany.com/report/e-commerce-furniture-global-market-report>; Nie (2022), Cross-Border E-Commerce Logistics Transportation Alternative Selection: A Multiattribute Decision-Making Approach. Available at: https://www.researchgate.net/publication/359114178_Cross-Border_E-Commerce_Logistics_Transportation_Alternative_Selection_A_Multiattribute_Decision-Making_Approach; Wang et al. (2019), The Impact of Cross-Border E-Commerce on International Marketing Channels: Evidence from China. Available at: https://eprints.soton.ac.uk/433955/1/IMM_accepted_version.pdf; Ai et al. (2023), Comparative Analysis of Online Fashion Business Models in Vietnam. Available at: https://www.researchgate.net/publication/368330633_Comparative_analysis_of_online_fashion_business_models_in_Vietnam; Inflow (2025), "Why More Fashion Brands Are Nearshoring to Vietnam Amid Rising Tariffs and Supply Chain Chaos." Available at: <https://www.joininflow.io/blogs/why-more-fashion-brands-are-nearshoring-to-vietnam-amid-rising-tariffs-and-supply-chain-chaos>

2. Vietnam's growing advantage in e-commerce exports

2.1. Furniture exports: performance and e-commerce opportunity

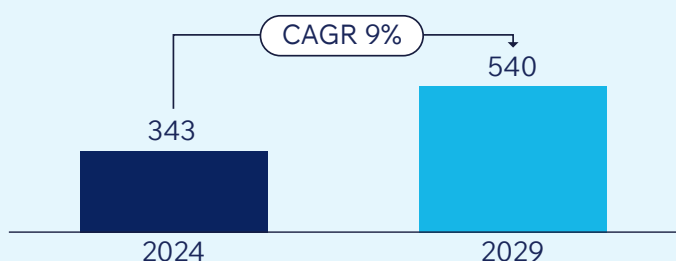
Vietnam's furniture industry is a key contributor to its manufacturing sector and a driver of overall export performance. In 2024, furniture export revenue totaled **VND 343 trillion** (USD 14 billion) and is expected to reach **VND 540 trillion** (USD 22 billion) by 2029, reflecting sustained global demand and Vietnam's competitiveness in production and design.¹² The country is the world's second-largest wooden furniture exporter, illustrating its ability to combine large-scale production with consistent quality supported by skilled craftsmanship, cost-efficiency, and growing strengths in sustainable sourcing.¹³

The rapid rise of e-commerce exports is reshaping Vietnam's furniture export model, offering a faster and more flexible path to reach global consumers. **While total furniture export revenues are projected to grow at a compound annual growth rate (CAGR) of 9% between 2024 and 2029, business-to-consumer (B2C) e-commerce exports are expected to expand at 20% annually—roughly twice as fast as overall exports** (Exhibit 1).¹⁴ This trend is crucial for furniture MSMEs in particular because exporting via e-commerce allows them to reach niche consumer segments, gauge interest in new designs with lower risk, and strengthen brand visibility abroad—advantages that are reshaping how Vietnamese MSMEs compete globally.¹⁵

Exhibit 1: B2C e-commerce presents a high-growth opportunity for furniture exporters, with e-commerce export revenues expected to outpace overall exports by two times

Overall export revenue¹ from furniture products earned by Vietnamese businesses VND trillion, 2024 and 2029

X% Annual growth rate in export revenue from 2024 to 2029



With an estimated **20%** growth rate — **2x that of overall furniture exports** — B2C e-commerce export offers a major growth opportunity for Vietnam's furniture sector²

1. Overall export revenue encompasses the value of all product shipments, covering both business-to-consumer (B2C) and business-to-business (B2B) models, which move through both e-commerce and non-e-commerce channels.

2. The expected growth rate for Vietnam's B2C e-commerce exports of furniture products was derived from Access Partnership's 2025 survey of 150 furniture MSMEs in Vietnam on their projected five-year growth in cross-border B2C e-commerce export sales.

Source: Access Partnership analysis; Access Partnership's survey of 150 MSMEs engaged in e-commerce for furniture.

¹² Estimates are based on the latest available annual data.

¹³ Sources include: OEC (n.d.), "Furniture, wooden, nes." Available at: <https://oec.world/en/profile/hs/furniture-wooden-nes>; Cosmo Sourcing (2024), "The Top 10 Vietnam Furniture Manufacturers 2024." Available at: <https://www.cosmosourcing.com/blog/the-top-10-vietnam-furniture-manufacturers-2024>; Ken Research (2025), Vietnam Furniture Manufacturing and Export Market. Available at: <https://www.kenresearch.com/vietnam-furniture-manufacturing-and-export-market>

¹⁴ Overall exports encompass all product shipments, covering both business-to-consumer (B2C), direct-to-consumer (D2C), and business-to-business (B2B) models, which move through both e-commerce and non-e-commerce channels.

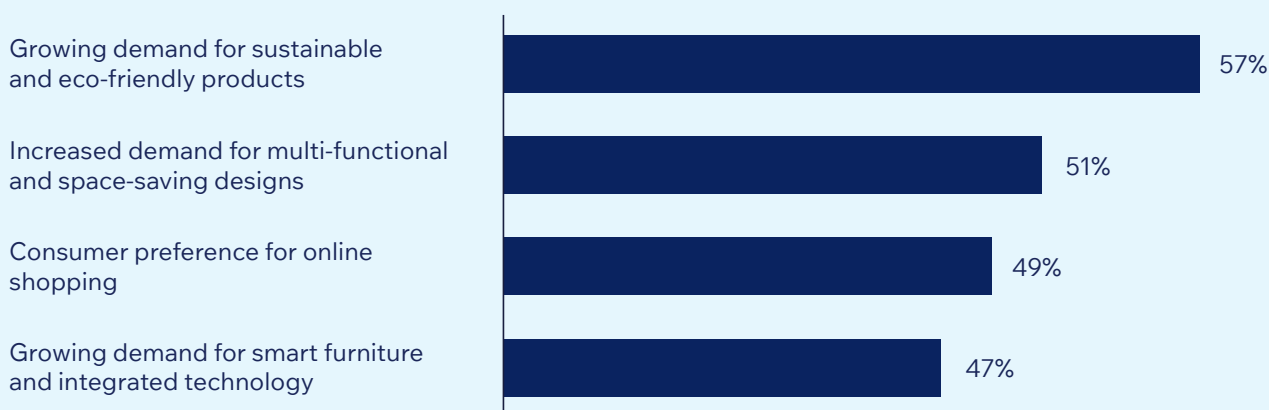
¹⁵ Sources include: Vietnam Ministry of Agriculture and Environment (2024), "Export Opportunities for Wood and Furniture with Cross-Border E-Commerce." Available at: <https://van.nongnghiepmoitrung.vn/export-opportunities-for-wood-and-furniture-with-cross-border-e-commerce-d378117.html>; LianLian Global (2024), Wayfair Export B2C Opportunities for Vietnamese Sellers in the Furniture and Home Décor Industry." Available at: <https://www.lianlianglobal.com/vn/en/blog/wayfair-potential>

On the demand side, rising interest in sustainable and eco-friendly furniture (**57%**) and multi-functional, space-saving designs (**51%**) are the leading drivers of Vietnam’s furniture B2C exports (Exhibit 2).¹⁶ The rising demand for sustainable goods suggests that consumers are willing to pay a premium for responsibly sourced and manufactured furniture.¹⁷ This encourages exporters to adopt certified timber and comply with the Vietnam Timber Legality Assurance System (VNTLAS), the national framework for verifying legal sourcing, production and trade.¹⁸ At the same time, the growing popularity of multi-functional, space-saving designs is driven by rapid urbanization and smaller living spaces, which increase demand for compact, versatile furniture.¹⁹ Vietnamese manufacturers are well placed to capture these trends due to their established expertise in modular, flat-pack designs that are efficient to ship and easy to adapt for different export destinations²⁰ By aligning their product innovation with global trends, Vietnamese furniture producers are using e-commerce exports to reach design-conscious and environmentally aware consumers worldwide.

Exhibit 2: Demand for sustainable products and space-saving designs is driving Vietnamese furniture e-commerce exports

Top demand drivers impacting the growth of furniture B2C e-commerce exports

Percent of surveyed consumer electronics MSMEs, %



Source: Access Partnership’s survey of 150 MSMEs engaged in e-commerce for furniture items in 2025.

2.2. Fashion exports: performance and e-commerce opportunity

Vietnam’s fashion industry plays a central role in the country’s export economy and continues to expand its global footprint. In 2024, overall fashion export revenue reached VND 1,661 trillion (USD 69 billion) and is projected to reach VND 2,137 trillion (USD 88 billion) by 2029.²¹ Vietnam has become a preferred sourcing base for global brands due to its competitive labor costs, skilled workforce, and reliable production quality.²² Its extensive supplier network, modern factories, and improving logistics infrastructure (such as upgraded ports

¹⁶ These findings are based on Access Partnership’s survey of 150 MSMEs engaged in e-commerce for furniture products in 2025.

¹⁷ PwC (2024), “Consumers willing to pay 9.7% sustainability premium, even as cost-of-living and inflationary concerns weigh: PwC 2024 Voice of the Consumer Survey.” Available at: <https://www.pwc.com/gx/en/news-room/press-releases/2024/pwc-2024-voice-of-consumer-survey.html>

¹⁸ VNTLAS (n.d.), “The Vietnam Timber Legality Assurance System.” Available at: <https://en.vntlas.org/>

¹⁹ Sources include: UNCTAD (n.d.), “Business e-commerce sales and the role of online platforms.” Available at: <https://unctad.org/publication/business-e-commerce-sales-and-role-online-platforms>; Berg Insight (2023), “The number of smart homes in Europe and North America reached 120 million in 2022.” Available at: <https://www.bergsight.com/the-number-of-smart-homes-in-europe-and-north-america-reached-120-million-in-2022>

²⁰ Modular flatpack furniture designs consist of standardized, interchangeable components that can be packed flat for efficient shipping and easily assembled into customizable configurations by the end user. Source: NDF Furniture (2025), “Why Vietnam is Leading in Low-Cost Furniture Manufacturing & Export.” Available at: <https://ndffurniture.com/vietnam-low-cost-furniture-manufacturing-export/>; Casta Cabinetry (2025), “Flat Pack Furniture: Definition, Benefits & Top Manufacturers.” Available at: <https://castacabinetry.com/post/flat-pack-furniture/>

²¹ Estimates are based on the latest available annual data.

²² Sources include: Nike (2025), “Nike Manufacturing Map.” Available at: <https://manufacturingmap.nikeinc.com/>; Adidas (2024), “Sourcing and supply chain.” Available at: <https://report.adidas-group.com/2024/en/group-management-report-our-company/description-of-business-model/sourcing-and-supply-chain.html>; Fast Retailing (2024), Annual Report 2024. Available at: https://www.fastretailing.com/eng/ir/library/pdf/ar2024_en_sp.pdf; LSOU (n.d.), “Home.” Available at: <https://lsoul.com/en/home/>; Tatchu (n.d.), “About.” Available at: <https://tatchu.world/>

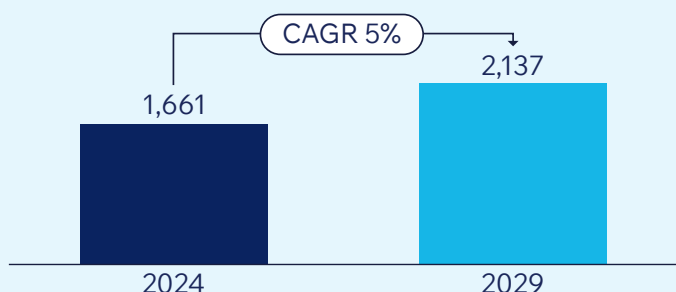
that enable faster processing) support rapid turnaround times, a critical advantage in the fast-changing fashion industry.²³

The rapid growth of e-commerce exports is transforming how Vietnam’s fashion industry connects with consumers worldwide. **While total fashion export revenues are projected to grow at about 5% annually between 2024 and 2029, B2C e-commerce fashion exports are expected to expand by about 26% per year, five times faster than overall exports** (Exhibit 3). This momentum reflects the rise of e-commerce platforms as powerful channels that can help MSMEs respond to fast-changing consumer demand, tailor products for diverse export destinations, and improve access to high-growth export destinations worldwide.²⁴

Exhibit 3: B2C e-commerce presents a huge opportunity for fashion exports, with e-commerce export revenues expected to outpace overall exports by five times

Overall export revenue¹ from fashion products earned by Vietnamese businesses VND trillion, 2024 and 2029

X% Annual growth rate in export revenue from 2024 to 2029



With an estimated **26%** growth rate — **15x that of overall fashion exports** — B2C e-commerce export offers a major growth opportunity for Vietnam’s fashion sector²

1. Overall export revenue encompasses the value of all product shipments, covering both B2C and B2B models, which move through both e-commerce and non-e-commerce channels.

2. The expected growth rate for Vietnam’s B2C e-commerce exports of fashion products was derived from Access Partnership’s 2025 survey of 150 fashion MSMEs in Vietnam on their projected five-year growth in cross-border B2C e-commerce export sales.

Source: Access Partnership analysis; Access Partnership’s survey of 150 MSMEs engaged in e-commerce for fashion.

Global consumer preferences for sustainable and culturally distinctive products are fueling the growth of Vietnam’s fashion B2C exports. Similar to furniture, sustainability is the top demand driver for Vietnamese fashion exports (55%), reflecting both regulatory momentum in export destinations such as the European Union (EU) with its Strategy for Sustainable and Circular Textiles, and consumers’ willingness to pay a premium for responsibly-made goods (Exhibit 4).²⁵ Cultural and heritage-inspired designs (51%) follow, supported by growing global interest in local designs and craftsmanship.²⁶ Vietnamese brands are



²³ Sources include: Nike (n.d.), “Manufacturing Map.” Available at: <https://manufacturingmap.nikeinc.com/>; Adidas (2024), “Sourcing and supply chain.” Available at: <https://report.adidas-group.com/2024/en/group-management-report-our-company/description-of-business-model/sourcing-and-supply-chain.html>; Fast Retailing (2024), Integrated Report 2024. Available at: https://www.fastretailing.com/eng/ir/library/pdf/ar2024_en_sp.pdf

²⁴ Sources include: Diantari (2021), Trend Cycle Analysis on Fast Fashion Products. Available at: https://www.researchgate.net/publication/370035521_TREND_CYCLE_ANALYSIS_ON_FAST_FASHION_PRODUCTS; WTO Center VCCI (2025), “Ample Room for Vietnam’s Cross-Border E-Commerce Exports.” Available at: <https://wtocenter.vn/chuyen-de/28369-ample-room-for-vietnams-cross-border-e-commerce-exports>; Toai (2025), Port infrastructure and export efficiency in Vietnam: A regional data perspective. Available at: https://www.researchgate.net/publication/394908991_Port_Infrastructure_and_Export_Efficiency_in_Vietnam_A_Regional_Data_Perspective

²⁵ The Strategy for Sustainable and Circular Textiles is the EU’s policy framework that aims to ensure textiles placed on the EU market are durable, repairable, recyclable, and produced with minimal environmental and social harm across their full lifecycle. Sources include: European Commission (2022), “Questions and Answers on EU Strategy for Sustainable and Circular Textiles.” Available at: https://ec.europa.eu/commission/presscorner/detail/en/qanda_22_2015; PwC (2024), “Consumers willing to pay 9.7% sustainability premium, even as cost-of-living and inflationary concerns weigh: PwC 2024 Voice of the Consumer Survey.” Available at: <https://www.pwc.com/gx/en/news-room/press-releases/2024/pwc-2024-voice-of-consumer-survey.html>

²⁶ FashionUnited (2025), “Spring/Summer 2026 trend report: Navigating a season of reorientation and mindful expression.” Available at: <https://fashionunited.com/news/fashion/spring-summer-2026-trend-report-navigating-a-season-of-reorientation-and-mindful-expression/2025060566413>

responding by using locally sourced organic cotton and bamboo fabrics, adopting small-batch production to reduce waste, and marketing designs that incorporate ethnic patterns and traditional weaving from regions such as Sapa and Hue.²⁷ Through e-commerce platforms, these brands position sustainability and cultural identity at the core of their appeal, targeting environmentally conscious and design-focused consumers worldwide.

Exhibit 4: Demand for sustainable products and heritage-inspired designs is driving Vietnamese e-commerce exports for fashion items

Top demand drivers impacting the growth of fashion B2C e-commerce exports

Percent of surveyed fashion MSMEs, %



Source: Access Partnership's survey of 150 MSMEs engaged in e-commerce for home goods.



²⁷ Sources include: Ha C.Y. (2022), Fashion Indigeneity: Representations of Ethnic Minority Textiles in Vietnam's Fashion. Available at: <https://escholarship.org/uc/item/0x1045hm>; The Investor (2024), "Sustainable Fashion Presents Promising Niche Market for Vietnam Garment Manufacturers." Available at: <https://theinvestor.vn/sustainable-fashion-presents-promising-niche-market-for-vietnam-garment-manufacturers-d14481.html>; Thai Son S.P. (2024), "Sustainable Garments Manufacturer in Vietnam." Available at: <https://thaisp.com/sustainable-fashion/sustainable-garments-manufacturer-in-vietnam/>

3. How e-commerce is reshaping MSME exports in furniture and fashion

MSMEs are central to Vietnam’s economy, accounting for 97% of all enterprises, over 60% of employment, and 25% of the country’s total export value.²⁸ They play an increasingly important role in export-oriented industries such as furniture and fashion, where deep manufacturing supply chains and large clusters of small producers support Vietnam’s competitiveness in global exports.²⁹ As these sectors continue to drive Vietnam’s export performance, understanding the factors impacting MSME export outcomes is critical to strengthening the country’s export competitiveness.

To support this analysis, this chapter draws on a 2025 survey of 150 furniture and 150 fashion MSMEs in Vietnam engaged in e-commerce. It examines the motivations for e-commerce adoption, factors that impact their competitiveness, and the key export destinations for Vietnamese MSMEs.

3.1. Why e-commerce export matters for MSME growth

E-commerce export is reshaping growth opportunities for Vietnamese MSMEs in furniture and fashion. Nearly all furniture and fashion MSMEs (97%) view it as critical for future expansion, signaling that digital channels are now central to strategic business planning (Exhibit 5). Furthermore, 96% report that e-commerce has boosted their global competitiveness against larger firms, demonstrating how digital platforms level the playing field. Moreover, 98% see a direct link between their e-commerce presence and offline sales, highlighting a powerful spillover effect: e-commerce not only drives revenue but also strengthens brand visibility, customer loyalty, and overall overseas presence.³⁰



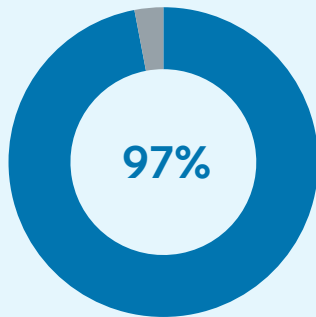
²⁸ Sources include: General Statistics Office of Vietnam (2025), Statistical Yearbook of Viet Nam 2024. Available at: <https://www.nso.gov.vn/en/data-and-statistics/2025/09/statistical-yearbook-of-viet-nam-2024/>; Asian Development Bank (2024), “Asia SME Monitor 2024.” Available at: <https://www.adb.org/publications/asia-sme-monitor-2024>

²⁹ Sources include: International Labour Organization (2023), “Viet Nam’s Wood and Furniture Industry: A Systemic Sector Assessment.” Available at: <https://www.ilo.org/publications/viet-nam%E2%80%99s-wood-and-furniture-industry-systemic-sector-assessment>; UNESCAP (2017), Vietnamese textile and apparel industry in the context of FTA: The labour and social impacts. Available at: <https://www.unescap.org/sites/default/files/DA9%20Viet%20Nam%20Session%207%20-%20textile%20and%20apparel%20industry.pdf>

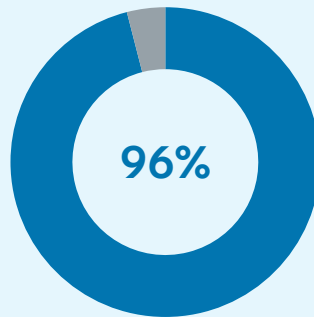
³⁰ Sources include: Fatema B. (2024), Exploring the link between offline and online retail performance: Insights from 15 years of retail sales data in Great Britain. Available at: <https://www.emerald.com/md/article-abstract/doi/10.1108/MD-04-2024-0854/1258238/Exploring-the-link-between-offline-and-online>; Luo et al. (2020), Complementarity and cannibalization of offline to online targeting: A field experiment on omnichannel commerce. Available at: <https://www.fox.temple.edu/sites/fox/files/Complementarity-and-Cannibalization-of-Offline-to-Online-Targeting-A-Field-Experiment-on-Omnichannel-Commerce.pdf>

Exhibit 5: 97% of MSMEs in Vietnam report that e-commerce export is essential for their growth, with 96% stating that it has increased their competitiveness

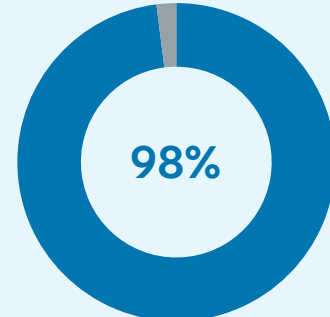
B2C e-commerce export engagement patterns among Vietnamese MSMEs
Percent of surveyed furniture and fashion MSMEs, %



of MSMEs report that **e-commerce export is essential for their future growth**



of MSMEs stated that engaging in **e-commerce has made them more globally competitive** compared to larger firms



of MSMEs agree that their **e-commerce activity drive a direct increase in sales through their offline channels**

Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis

Expanding overseas outreach is the leading motivation for Vietnamese furniture and fashion MSMEs to adopt e-commerce for exports. Digital platforms enable MSMEs to engage directly with foreign customers (56%) and access a wider range of export destinations (53%) without the need for physical storefronts, overseas distributors, or trade intermediaries (Exhibit 6). This accessibility helps level the playing field for MSMEs that previously faced high entry costs, complex documentation, and limited brand visibility in export destinations.³¹ As global Internet penetration deepens and fuels the growing demand for online shopping (49%), e-commerce export is reducing the time and resources needed to test new export destinations, gather consumer feedback, and scale internationally.³²



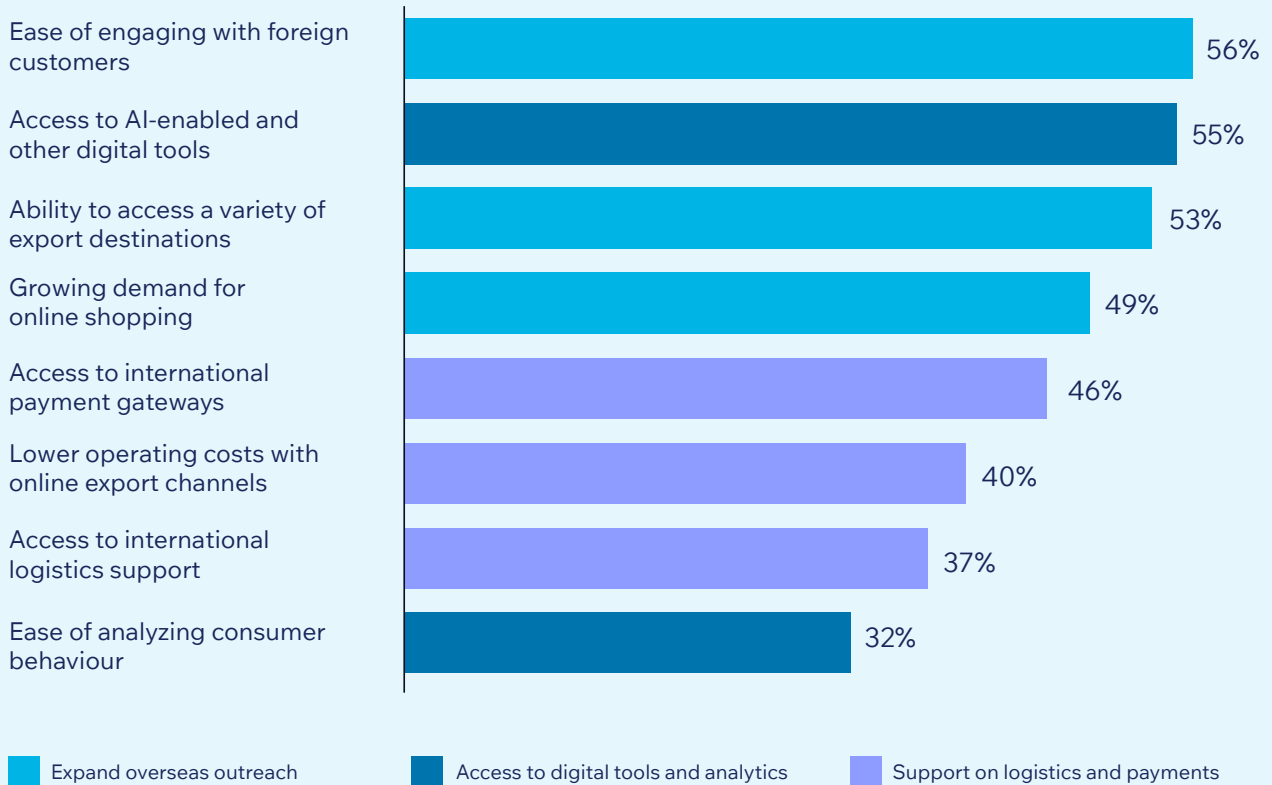
³¹ Sources include: APEC (2017), Annex A – APEC Cross-Border E-Commerce Facilitation Framework. Available at: https://mddb.apec.org/Documents/2017/MM/AMM/17_amm_jms_anxa.pdf; World Trade Organization (2022), B2B E-commerce marketplaces and MSMEs: evidence of Global Value Chain facilitation?. Available at: https://www.wto.org/english/res_e/reser_e/ersd202207_e.htm

³² Sources include: Cassia et al. (2022), Cross-Border e-Commerce as a foreign market entry mode among SMEs: the relationship between export capabilities and performance. Available at: <https://www.emerald.com/ribs/article/32/2/267/372784/Cross-border-e-commerce-as-a-foreign-market-entry>; Chen et al. (2025), The role of cross-border E-commerce platforms in the digital economy: empower firms to gain global market insights to increase global competitiveness. Available at: <https://link.springer.com/article/10.1007/s44362-024-00003-0>

Exhibit 6: For Vietnamese MSMEs, expanding overseas outreach is the primary motivation for exporting via e-commerce

Reasons for the use of e-commerce to export

Percent of surveyed furniture and fashion MSMEs, %



Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis



Box 1: Vietnamese brands that leveraged e-commerce to reach international markets

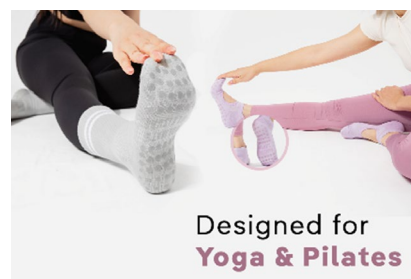
E-commerce is enabling Vietnamese manufacturers to bypass traditional export intermediaries, build their own brands, and reach overseas consumers directly. Brands such as Green Mekong and Coolmate demonstrate how digital platforms can accelerate this transition and drive tangible export growth.

Green Mekong transitioned from over 20 years of traditional business-to-business (B2B) manufacturing experience into a B2C e-commerce exporter, shifting from original equipment manufacturer (OEM) production to selling under its own brand on Amazon's stores.³³ This transition enabled the home décor company to move up the value chain, with its product portfolio now spanning indoor furniture, outdoor products, and lifestyle items.

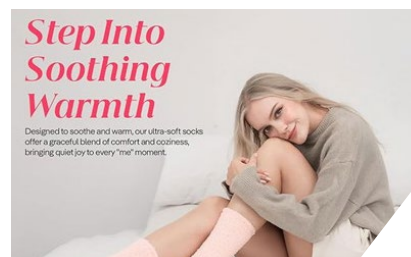


To scale e-commerce export operations, Green Mekong relies extensively on Fulfilment by Amazon (FBA) and adopts generative AI tools for listing optimization and creative production.³⁴ Customer feedback on Amazon is systematically analyzed and fed directly into factory R&D, enabling continuous product improvement. Within 12 months, six products received the “Amazon's Choice” badge, and its flagship deck tile product ranked first on Amazon's “Most Wished For” list, demonstrating how e-commerce-enabled exports can translate into rapid market traction.

Similarly, **Coolmate**, a Vietnamese fashion startup, has used e-commerce to enter international markets by pursuing a product-led growth strategy rather than competing primarily on price. The company leveraged Amazon's Product Opportunity Explorer to identify unmet demand and develop products—such as sports socks and moisture-wicking underwear—tailored to USA consumer preferences.³⁵ To reinforce quality differentiation, Coolmate also invested in sustainability certifications, helping to build trust with overseas customers.



Operationally, Coolmate adopted FBA to manage international logistics and ensure reliable delivery to overseas customers.³⁶ With support from the Amazon Global Selling Vietnam team, its sports socks achieved the “Best Seller” badge with over 25,000 monthly orders.³⁷ Recognized as “Rising Star 2025,” Coolmate now aims to generate 50% of its revenue from global markets by 2030, positioning e-commerce as its primary channel for international expansion.³⁸



³³ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf

³⁴ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf

³⁵ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf

³⁶ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf

³⁷ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf




³⁸ Amazon global selling (2025), Accelerate Vietnam as Southeast Asia's E-Commerce Export Hub. Available at: https://m.media-amazon.com/images/G/28/AS/AGS/images/website/VNSellDot/seller-report-2025/Amazon_Vietnam_SMEs_Empowerment_Report_2025_ENG_org.pdf

3.2. Key export destinations: current and future outlook

Vietnamese MSMEs are strategically targeting large, mature economies for e-commerce export expansion. MSMEs reported the **United States of America (USA), China, the United Kingdom (UK), and Japan** to be their top export destinations today and in five years (Exhibit 7). They mirror the current export destinations reported by Vietnamese MSMEs. The USA leads—with **85%** of furniture MSMEs and **78%** of fashion MSMEs viewing it favorably—underscoring its role as a high-value export destination with strong purchasing power. Along with the USA, the other top export destinations identified exhibit robust demand for consumer goods with strong e-commerce adoption, reliable logistics infrastructure, and established digital payment systems.³⁹

Trade with these key economies is also supported by a network of FTAs that reduce trade barriers and facilitate e-commerce transactions. Agreements such as the US–Vietnam Bilateral Trade Agreement, the UK–Vietnam Free Trade Agreement, and the Regional Comprehensive Economic Partnership (RCEP) help streamline customs procedures, lower tariffs, and improve transparency for online exporters.⁴⁰ For instance, the RCEP aims to eliminate tariffs on around 90% of goods traded within the bloc, and includes provisions on digital and customs cooperation, enabling Vietnamese MSMEs to export more efficiently and participate more deeply in regional trade.⁴¹

Exhibit 7: The USA, China, and the UK are identified as leading export destinations for Vietnamese furniture and fashion MSMEs exporting via e-commerce

Ranking	Top export destinations identified by MSMEs today and in five years ¹	
1 st	USA	
2 nd	China	
3 rd	UK	
4 th	Japan	

1. Top export destination is calculated as the share of total respondents that selected the market within their top 3 ranking out of 5.

Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis

³⁹ Sources include: McKinsey & Company (2024), Global Payments Report. Available at: <https://www.mckinsey.com/industries/financial-services/our-insights/global-payments-report>; Mordor Intelligence (2024), China E-Commerce Logistics Market. Available at: <https://www.mordorintelligence.com/industry-reports/china-e-commerce-logistics-market>; Crossborder Digital (n.d.), “China eCommerce Stats.” Available at: <https://crossborder.digital/china-e-commerce-stats/>; Transport Intelligence (2025), “UK E-Commerce Growth and the Evolving Returns Landscape.” Available at: <https://ti-insight.com/briefs/uk-e-commerce-growth-and-the-evolving-returns-landscape/>

⁴⁰ Sources include: Office of the United States Trade Representative (2000), Agreement between the United States of America and the Socialist Republic of Vietnam on trade relations. Available at: <https://ustr.gov/sites/default/files/US-VietNam-BilateralTradeAgreement.pdf>; UK Government (2020), UK–Vietnam Free Trade Agreement. Available at: <https://www.gov.uk/government/collections/uk-vietnam-free-trade-agreement>; Vietnam National Trade Repository (2023), “RCEP Creates New Growth Driver for Vietnam’s Trade.” Available at: <https://vntr.moit.gov.vn/news/rcep-creates-new-growth-driver-for-vietnams-trade>

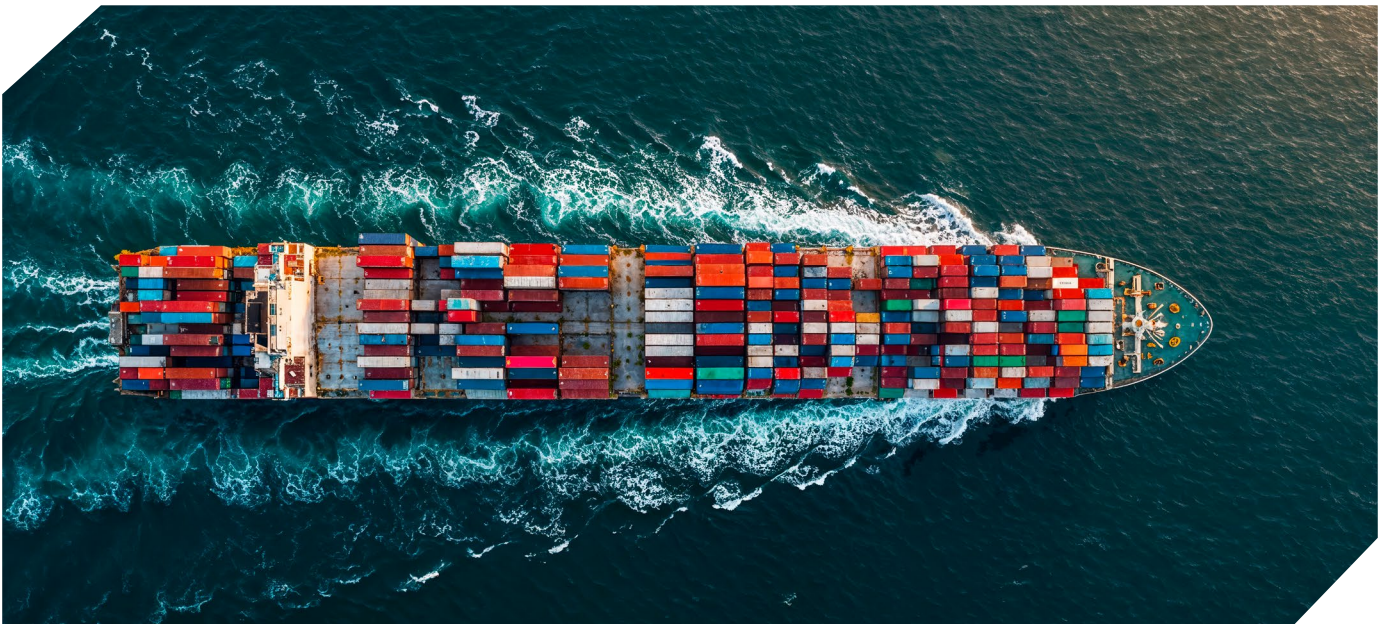
⁴¹ Vietnam National Trade Repository (2023), “RCEP Creates New Growth Driver for Vietnam’s Trade.” Available at: <https://vntr.moit.gov.vn/news/rcep-creates-new-growth-driver-for-vietnams-trade>

Box 2: Amazon Global Logistics lowers costs of cross-border logistics for Vietnamese MSMEs

Amazon Global Logistics (AGL) provides Vietnamese MSMEs with an end-to-end service for USA-bound exports, significantly reducing the financial and operational barriers of international trade.⁴² Launched in Vietnam in 2025, AGL leverages the FBA network to integrate international freight, customs clearance, and last-mile delivery to USA fulfilment centres within a single platform. This integrated logistics pathway simplifies USA import compliance and mitigates execution risks for MSMEs with limited international logistics expertise.

Beyond simplifying business operations, AGL helps alleviate cross-border logistics costs for MSMEs by leveraging Amazon's global shipping scale. By aggregating freight volumes, the service offers competitive shipping rates compared to those typically accessible to smaller exporters.⁴³ Furthermore, bundling freight, customs, and delivery into a single workflow reduces administrative overheads, minimizes delays, and lowers inventory holding costs, improving cost predictability for MSMEs.⁴⁴

By eliminating the need to coordinate multiple freight forwarders, customs brokers, and transport providers, AGL lowers logistics costs and improves operational efficiency for Vietnamese MSMEs exporting to the USA, making e-commerce exports a more accessible and scalable growth channel.



⁴² Amazon (n.d.), "End-to-end ocean and air freight solutions for Amazon FBA sellers." Available at: <https://sell.amazon.com/programs/amazon-global-logistics>

⁴³ Sources include: Amazon (n.d.), "End-to-end ocean and air freight solutions for Amazon FBA sellers." Available at: <https://sell.amazon.com/programs/amazon-global-logistics>; Hafner et al. (2022), Endogenous transport costs and international trade. Available at: https://www.researchgate.net/publication/254421070_Endogenous_transport_costs_and_international_trade

⁴⁴ Amazon (n.d.), "End-to-end ocean and air freight solutions for Amazon FBA sellers." Available at: <https://sell.amazon.com/programs/amazon-global-logistics>

4. Challenges facing Vietnam’s furniture and fashion MSMEs

The survey of Vietnamese MSMEs in the furniture and fashion industries examined the main obstacles they face when exporting through e-commerce channels. These challenges fall into four broad categories:

- **Cost barriers** capture the financial pressures of selling abroad via e-commerce, ranging from high logistics expenses to compliance fees and staffing and fulfilment costs.
- **Regulatory barriers** stem from complex or inconsistent legal and compliance requirements across export destinations. This includes managing export documentation and determining which products comply with regulations in export destinations.
- **Knowledge barriers** reflect gaps in MSMEs’ understanding of export destinations and service providers, such as limited awareness of consumer preferences or international shipping options.
- **Capability barriers** reflect limits in staffing, partnerships, and resources that restrict firms from engaging overseas buyers. For example, firms cite difficulties in hiring skilled talent and negotiating favorable arrangements with manufacturers and suppliers.

4.1. Barriers to exporting via e-commerce

Cost barriers emerged as the most significant hurdle for Vietnamese furniture and fashion MSMEs exporting via e-commerce, with MSMEs citing high cross-border logistics costs as a key challenge (Exhibit 8). Regulatory barriers ranked a close second, reflecting widespread difficulties in navigating complex and frequently changing regulations in export destinations. Along with knowledge gaps and capability barriers, these challenges hamper Vietnamese MSMEs’ competitiveness in global e-commerce.

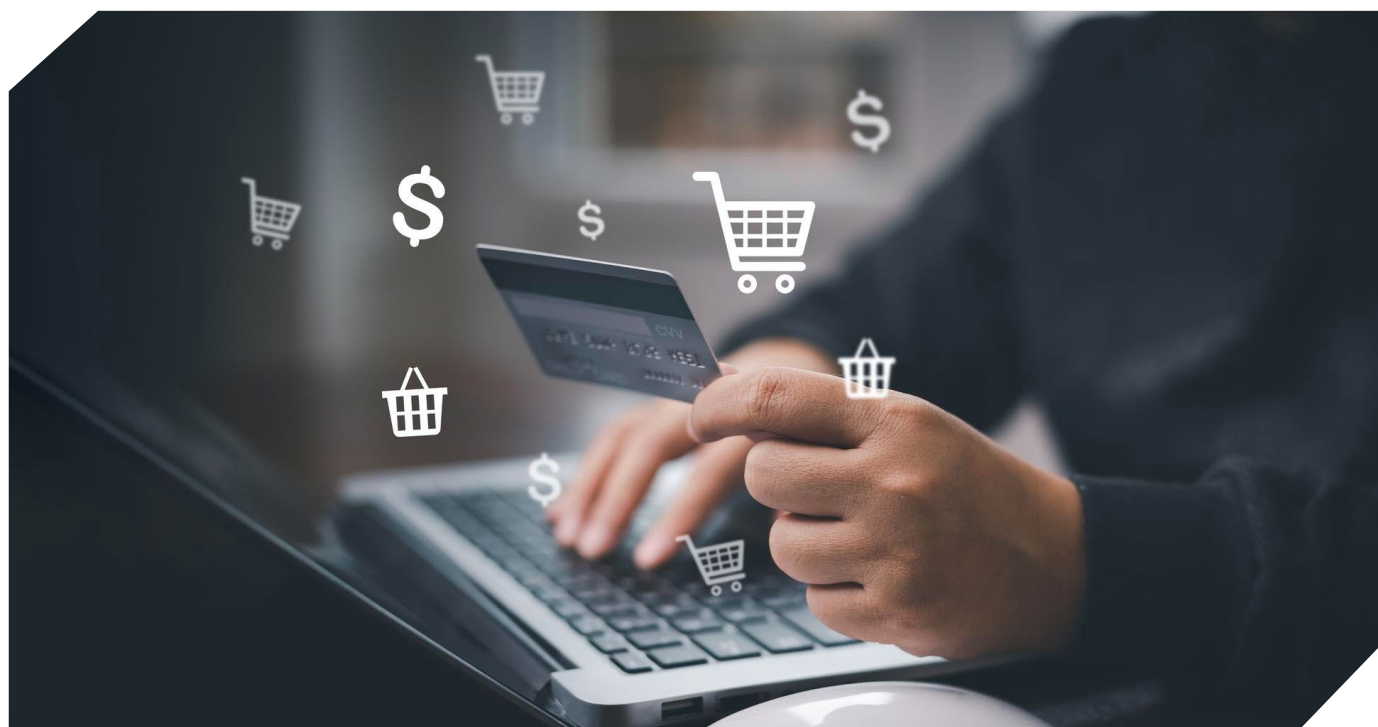






Exhibit 8: High cross-border logistics costs and a complex regulatory environment in export destinations are the top barriers to exporting via e-commerce

Barriers type	Top barrier faced by MSMEs	Percent of MSMEs that face the barrier, %		Underlying causes of the top barriers faced by MSMEs	
		FURNITURE	FASHION	FURNITURE	FASHION
Cost barriers 	High costs of cross-border logistics	94%	86%	<ul style="list-style-type: none"> Costs associated with warehousing, storage and fulfilment in export destinations Packaging requirements and protective packaging 	<ul style="list-style-type: none"> International shipping and freight rates Costs associated with handling reverse logistics and returns
Regulatory barriers 	Complex and changing regulations in export destinations	92%	86%	<ul style="list-style-type: none"> Product compliance regulations and standards in export destinations Product labelling requirements in export destinations 	<ul style="list-style-type: none"> Product compliance regulations and standards in export destinations High costs of regulatory compliance in export destinations
Knowledge barriers 	Limited knowledge on various aspects of exporting via e-commerce	88%	84%	<ul style="list-style-type: none"> Limited understanding of e-commerce business models and strategies Limited awareness of regulatory requirements 	<ul style="list-style-type: none"> Limited knowledge on demand in export destinations and consumer insights Limited understanding of e-commerce business models and strategies
Capability barriers 	Shortage in manpower, skills, and partnerships	87%	85%	<ul style="list-style-type: none"> Lack of workers with supply-chain and logistics expertise Lack of understanding of technical operations and e-commerce platform integration 	<ul style="list-style-type: none"> Lack of workers with regulatory and compliance expertise Lack of workers with supply-chain and logistics expertise

Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis

4.1.1. Cost barriers

In Vietnam, the high costs of cross-border logistics were the primary constraint to e-commerce export participation, cited by **94%** of furniture MSMEs and **86%** of fashion MSMEs (Exhibit 8). While both sectors face financial pressure, the underlying drivers differ significantly based on product characteristics and consumer behavior.

For furniture MSMEs, these pressures are primarily driven by the high costs of **warehousing, storage, and fulfilment in export destinations**, particularly for MSMEs who have not established modern inventory systems and fulfilment infrastructure, alongside **packaging and protective packaging requirements**. These challenges reflect the complexities of handling bulky and fragile furniture items, compounded by high warehouse occupancy costs in key export destinations like the USA.⁴⁵ For fashion MSMEs, cost pressures are mainly driven by **international shipping and freight rates**, as well as **costs of managing reverse logistics and returns**. These challenges are intensified by fast-changing consumer preferences and high return rates for fashion products sold via e-commerce.⁴⁶ Collectively, these challenges constrain MSMEs' ability to invest in product innovation and business development, ultimately undermining their quality and price competitiveness in global e-commerce.

⁴⁵ Sources include: Savills Singapore (2024), Singapore Industrial Briefing – Q1 2024. Available at: https://www.savills.com/research_articles/255800/378038-0; Brown West Logistics (2024), U.S. Average Warehouse Cost per Square Foot. Available at: <https://brownwestlogistics.com/blog/us-average-warehouse-cost-per-square-foot>

⁴⁶ Rocket Returns (2025), "Ecommerce Return Rates 2025: Complete Industry Analysis + Benchmarks by Category." Available at: <https://www.rocketreturns.io/blog/ecommerce-return-rates-2025-complete-industry-analysis-benchmarks-by-category>

4.1.2. Regulatory barriers

Complex and changing regulations in export destinations were reported by **92%** of furniture MSMEs and 86% of fashion MSMEs, driven primarily by **product compliance regulations and standards abroad**. For instance, furniture MSMEs must navigate new and tightening regulations, including stricter traceability requirements under the EU's timber legality framework and evolving formaldehyde safety standards in export destinations such as the USA and the EU.⁴⁷ They also face challenges complying with **product labelling rules in export destinations**, which can result in fines, shipment delays, and costly relabelling.⁴⁸

Fashion MSMEs similarly face **high regulatory compliance costs in export destinations**, driven by regulatory changes such as expanded sustainable sourcing requirements under the EU Strategy for Sustainable and Circular Textiles.⁴⁹ Beyond increasing costs, persistent regulatory complexity heightens export risks and uncertainty for MSMEs, ultimately weakening their competitiveness relative to larger, better-resourced global competitors.

Box 3: Domestic regulatory and administrative procedures affecting e-commerce exports

Beyond regulatory barriers in export destinations, domestic regulatory and administrative procedures also create structural frictions that constrain MSMEs' ability to scale e-commerce exports. In Access Partnership's 2024 survey of Vietnamese MSMEs, 44% of respondents reported that navigating domestic export regulations poses a challenge to exporting via e-commerce.⁵⁰ While these barriers are not always cited as the primary constraint relative to export-destination challenges, they compound external frictions by increasing compliance costs, reducing predictability, and slowing fulfilment, particularly for fashion and furniture MSMEs engaged in B2C e-commerce exports.

Key domestic regulatory barriers include:

- **Navigating evolving regulatory requirements and local implementation practices:** Frequent updates to circulars governing customs procedures and documentation requirements increase regulatory uncertainty and administrative burden for MSMEs.⁵¹ Inconsistent interpretation and implementation across provincial authorities further complicates compliance.⁵² For example, when Circular 39/2018/HQ on electronic export declarations was first introduced, exporters reported difficulties with inconsistent local implementation and limited clarity on documentation requirements, leading to delays and additional compliance costs.⁵³
- **Operational and cash-flow impacts linked to value-added tax (VAT) refund processes:** Under Vietnam's VAT regime, exporters applying the zero-rated treatment may claim refunds on input VAT paid on production, logistics, and other eligible costs, subject to documentary proof that goods were exported and tax invoices, customs declarations, and tax filings are fully aligned.⁵⁴ For MSMEs engaged in e-commerce exports, compliance is more complex due to high-frequency, low-value shipments and platform-mediated transactions, which complicate invoice matching and documentation consistency.⁵⁵ Despite recent VAT reforms intended to streamline

⁴⁷ Formaldehyde is a chemical used in resins and adhesives for furniture because it strengthens bonding and improves durability in engineered wood products. Sources include: Panels Furniture Asia (2024), "EU regulation on timber origin poses challenge to Vietnamese exporters." Available at: <https://panelsfurnitureasia.com/eu-regulation-on-timber-origin-poses-challenge-to-vietnamese-exporters/>; European Union (2023), "Regulation (EU) 2023/1464 of 14 July 2023 amending Annex XVII to REACH as regards formaldehyde and formaldehyde releasers." Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A32023R1464>; United States Environmental Protection Agency (2024), "Frequent questions for regulated stakeholders about implementing formaldehyde standards." Available at: <https://www.epa.gov/formaldehyde/frequent-questions-regulated-stakeholders-about-implementing-formaldehyde-standards>

⁴⁸ ECQA (2025), "7 Labeling and Packaging Mistakes That Cause Rejections." Available at: <https://ecqa.com/7-labeling-and-packaging-mistakes-that-cause-rejections/>

⁴⁹ Sources: European Commission (2022), "Questions and Answers: EU Strategy for Sustainable and Circular Textiles." Available at: https://ec.europa.eu/commission/presscorner/detail/en/qanda_22_2015;

⁵⁰ Access Partnership's survey of 200 MSMEs on e-commerce in Vietnam in 2024.

⁵¹ ITC (2023), Invisible Barriers to Trade. Available at: <https://www.intracen.org/fr/media/16785>

⁵² ITC (2023), Invisible Barriers to Trade. Available at: <https://www.intracen.org/fr/media/16785>

⁵³ ITC (2023), Invisible Barriers to Trade. Available at: <https://www.intracen.org/fr/media/16785>

⁵⁴ BDO (2025), "BDO Indirect Tax News." Available at: <https://www.bdo.global/en-gb/insights/tax/indirect-tax/vietnam-new-vat-law-affects-foreign-businesses-in-e-commerce-and-digital-sectors>

⁵⁵ Sources include: HM&P (2024), "To facilitate the value - added tax refund process." Available at: <https://hmplaw.vn/en/to-facilitate-the-value-added-tax-refund-process>; VietnamPlus (2025), "Legislators debate adjustments to VAT Law." Available at: <https://en.vietnamplus.vn/legislators-debate-adjustments-to-vat-law-post333985.vnp>; Nhan Dhan (2025), "Over 29 trillion VND in tax refunds issued." Available at: <https://en.nhandan.vn/over-29-trillion-vnd-in-tax-refunds-issued-post146226.html>; HM&P (2024), "To facilitate the value - added tax refund process." Available at: <https://hmplaw.vn/en/to-facilitate-the-value-added-tax-refund-process>; BDO (2025), "BDO Indirect Tax News." Available at: <https://www.bdo.global/en-gb/insights/tax/indirect-tax/vietnam-new-vat-law-affects-foreign-businesses-in-e-commerce-and-digital-sectors>

administration, refund processing is frequently delayed by reporting errors and discrepancies between firms' accounting records and tax authorities' verification requirements. These delays tie up working capital, heighten liquidity risks, and constrain the ability of MSMEs to reinvest in inventory and marketing, thereby limiting their capacity to scale their business.⁵⁶

- **Compliance challenges with mandatory e-invoicing requirements:** While mandatory e-invoicing under Decree 123/2020/ND-CP and Circular No. 32/2025/ND-CP is intended to improve administrative efficiency, it imposes significant compliance costs on MSMEs that lack the technical and accounting capabilities. These regulations require exporters to issue compliant electronic invoices for export transactions while ensuring consistency between tax records and customs declarations.⁵⁷ However, for MSMEs and first-time e-commerce exporters, limited in-house capabilities increase the risk of administrative errors and processing delays.⁵⁸ Ultimately, these barriers raise fixed compliance costs and constrain broader participation in e-commerce exports.

Together, these domestic procedural frictions increase compliance costs and disproportionately affect MSMEs with limited administrative and technical capacity. Addressing these issues, alongside the export-destination barriers, will be critical to enabling more Vietnamese fashion and furniture MSMEs to fully leverage e-commerce export opportunities.

4.1.3. Knowledge barriers

Limited knowledge of various aspects of exporting via e-commerce was cited by **88%** of furniture MSMEs and **84%** of fashion MSMEs. For MSMEs in both categories, knowledge gaps are driven by a **limited understanding of e-commerce business models and strategies**. Furniture MSMEs are further constrained by a **limited awareness of regulatory requirements**, while fashion MSMEs reported lacking insights into **overseas consumers and demand in export destinations**. Rapid developments in global e-commerce, with new business models such as social commerce, digital marketing strategies like influencer marketing, and new analytics tools to gain real-time insights on shifting consumer tastes, can potentially widen knowledge gaps for MSMEs.⁵⁹ Inability to close these gaps can compound other barriers, hindering MSMEs' competitiveness in global e-commerce.



⁵⁶ Sources include: HM&P (2024), "To facilitate the value - added tax refund process." Available at: <https://himplaw.vn/en/to-facilitate-the-value-added-tax-refund-process>; VietnamPlus (2025), "Legislators debate adjustments to VAT Law." Available at: <https://en.vietnamplus.vn/legislators-debate-adjustments-to-vat-law-post333985.vnp>; Nhan Dan (2025), "Over 29 trillion VND in tax refunds issued." Available at: <https://en.nhandan.vn/over-29-trillion-vnd-in-tax-refunds-issued-post146226.html>; HM&P (2024), "To facilitate the value - added tax refund process." Available at: <https://himplaw.vn/en/to-facilitate-the-value-added-tax-refund-process>

⁵⁷ Sources include: Chinphu.vn (n.d.), "Nghị định số 123/2020/NĐ-CP của Chính phủ: Quy định về hóa đơn, chứng từ." Available at: <https://vanban.chinphu.vn/?docid=201365&pageid=27160>; Chinphu.vn (n.d.), "Thông tư số 32/2025/TT-BTC của Bộ Tài chính: Hướng dẫn thực hiện một số điều của Luật Quản lý thuế ngày 13 tháng 6 năm 2019, Nghị định số 123/2020/NĐ-CP ngày 19 tháng 10 năm 2020 của Chính phủ quy định về hóa đơn, chứng từ, Nghị định số 70/2025/NĐ-CP ngày 20 tháng 3 năm 2025 sửa đổi, bổ sung một số điều của Nghị định số 123/2020/NĐ-CP." Available at: <https://vanban.chinphu.vn/?docid=213855&pageid=27160>

⁵⁸ Sources include: Thi et al. (2025), Digital Technology Adoption and SME Performance in Vietnam: A Pilot Study of Innovation Capability and Entrepreneurial Orientation. Available at: <https://www.aasmr.org/liss/Vol.12/No.9/Vol.12.No.9.08.pdf>; FedEx (2025), "How SMEs Can Overcome Barriers To Cross-Border Trade In Asia Pacific." Available at: <https://www.fedex.com/en-vn/business-insights/sme/apac-smes-global-trade-growth.html>

⁵⁹ DHL (n.d.), "The rise of social commerce." Available at: <https://www.dhl.com/global-en/delivered/global-trade/the-rise-of-social-commerce.html>; Shopify (2025), "Ecommerce Influencer Marketing: A Complete Guide (2025)." Available at: <https://www.shopify.com/sg/enterprise/blog/instagram-influencer-marketing-in-ecommerce>

4.1.4. Capability barriers

Shortages in manpower, skills, and partnerships were reported by over **85%** of surveyed MSMEs. A primary bottleneck is a **shortage of supply-chain and logistics expertise**, which limits their ability to manage cross-border fulfilment efficiently. These findings are corroborated by wider research indicating that Vietnam's logistics sector faces a systemic deficit of professionals with experience in international operations.⁶⁰ Beyond logistics, furniture MSMEs also cited a **limited understanding of technical operations and e-commerce platform integration**, while fashion MSMEs highlighted **shortages in regulatory and compliance expertise**. These industry-specific gaps are exacerbated by a national shortage of skilled e-commerce professionals, particularly those with data analytics capabilities and the technical proficiency to execute omnichannel fulfilment. Together, these deficits reinforce the capability barriers that prevent Vietnamese MSMEs from scaling their global footprint.⁶¹

Targeted policy interventions and more integrated export support will be essential to help MSMEs navigate these constraints and expand their participation in global e-commerce.



⁶⁰ Hà et al. (2023), Development of Logistics Vietnam Services: Situation and Solutions. Available at: https://www.researchgate.net/publication/373429454_Development_of_Logistics_Vietnam_Services_Situation_and_Solutions

⁶¹ Vietnam Briefing (2025), "Vietnam's E-Commerce Sector: Current Landscape and 2026 Outlook." Available at: <https://www.vietnam-briefing.com/news/vietnams-e-commerce-sector-outlook-in-2026.html/>; Economist Impact (2023), "Bridging the skills gap: Fuelling careers and the economy in Vietnam." Available at: <https://impact.economist.com/new-globalisation/bridging-skills-gap-fuelling-careers-and-economy-vietnam>

5. Targeted policy action to accelerate e-commerce export growth

Vietnam is advancing a more ambitious policy agenda to strengthen its e-commerce ecosystem as it renews its national strategy. In 2025, the government launched the 2026–2030 National E-commerce Development Master Plan, building on the earlier 2021–2025 plan with more ambitious targets.⁶² The new framework serves as Vietnam’s overarching roadmap for deepening digital trade, outlining measures to boost online business adoption, grow e-commerce exports, and upgrade digital infrastructure. Headline targets include enabling 70% of the adult population to shop online, ensuring 60% of MSMEs operate on e-commerce platforms, and increasing e-commerce’s contribution to 20% of total retail sales.⁶³ Complementing these national efforts, the Vietnam E-commerce Association (VECOM) remains a critical partner in bridging capability gaps, leading training and capacity-building programs in digital marketing, export readiness, and online sales strategies.⁶⁴ Together, these measures aim to broaden digital participation, spur domestic e-commerce demand, and strengthen the enabling environment for MSMEs to engage in e-commerce exports.

To support this growth, Resolution No. 352/NQ-CP paved the way for Vietnam’s new Law on E-commerce, scheduled to take effect in July 2026.⁶⁵ The law introduces provisions requiring electronic identification (VNelD) for e-commerce sellers and strengthens requirements related to data management, consumer protection, and the handling of counterfeit goods.⁶⁶ These reforms are intended to enhance transparency and strengthen trust in Vietnam’s digital marketplace.

Complementing national reforms, provincial governments are also advancing export-enabling infrastructure and regulatory frameworks to support trade-oriented enterprises. A key example is Hai Phong’s 2025 announcement of a new Free Trade Zone (FTZ), designed to pilot streamlined administrative procedures, enhance logistics connectivity, and attract high-value manufacturing and trade investment.⁶⁷ By integrating simplified compliance procedures, upgraded infrastructure, and targeted investment incentives within a dedicated trade zone linked to Hai Phong’s port, the initiative aims to improve export processing efficiency and lower export costs for firms across northern Vietnam.⁶⁸ For MSMEs leveraging e-commerce, these optimizations can translate into lower regulatory burdens, faster delivery times, and enhanced price competitiveness in export destinations.

While these initiatives are strengthening Vietnam’s overall e-commerce ecosystem, more targeted policy interventions are needed to address regulatory and operational frictions that continue to constrain MSMEs’ participation in e-commerce exports. The following sections therefore focus on two priority areas: (i) strengthening domestic regulatory and institutional frameworks, and (ii) addressing export-destination barriers reported by MSMEs.



⁶² Ministry of Industry and Trade of Vietnam (2025), “Phê duyệt kế hoạch tổng thể phát triển thương mại điện tử quốc gia giai đoạn 2026–2030.” Available at: <https://moit.gov.vn/tin-tuc/phe-duyet-ke-hoach-tong-the-phat-trien-thuong-mai-dien-tu-quoc-gia-giai-doan-2026-2030.html>

⁶³ Ministry of Industry and Trade of Vietnam (2025), “Phê duyệt kế hoạch tổng thể phát triển thương mại điện tử quốc gia giai đoạn 2026–2030.” Available at: <https://moit.gov.vn/tin-tuc/phe-duyet-ke-hoach-tong-the-phat-trien-thuong-mai-dien-tu-quoc-gia-giai-doan-2026-2030.html>

⁶⁴ Vietnam E-commerce Association (n.d.), “Official website.” Available at: <http://en.vecom.vn/>

⁶⁵ Ministry of Industry and Trade of Vietnam (2025), “The National Assembly officially passes the E-Commerce law.” Available at: <https://moit.gov.vn/en/news/latest-news/the-national-assembly-officially-passes-the-e-commerce-law.html>

⁶⁶ Ministry of Industry and Trade of Vietnam (2025), “The National Assembly officially passes the E-Commerce law.” Available at: <https://moit.gov.vn/en/news/latest-news/the-national-assembly-officially-passes-the-e-commerce-law.html>

⁶⁷ Vietnam Briefing (2025), “Hai Phong Free Trade Zone: Implementation, Incentives and Opportunities.” Available at: https://www.vietnam-briefing.com/news/hai-phong-free-trade-zone-implementation-incentives-and-opportunities.html/?utm_source=chatgpt.com

⁶⁸ Vietnam Briefing (2025), “Hai Phong Free Trade Zone: Implementation, Incentives and Opportunities.” Available at: https://www.vietnam-briefing.com/news/hai-phong-free-trade-zone-implementation-incentives-and-opportunities.html/?utm_source=chatgpt.com

5.1. Strengthening domestic regulatory and institutional frameworks for e-commerce exports

Although export-destination barriers feature most prominently in MSME perceptions of cross-border challenges, domestic regulatory and administrative frictions remain important structural constraints on firms' ability to scale e-commerce exports. As highlighted in Box 3, compliance burdens related to customs procedures, VAT refunds, and mandatory e-invoicing increase transaction costs and reduce operational predictability, particularly for MSMEs with limited administrative capacity.

Strengthening export facilitation through coordinated policy mechanisms

Notably, 95% of MSMEs surveyed indicated that the government should adopt a comprehensive, long-term strategy dedicated specifically to e-commerce exports. Implemented at national and provincial levels, such a framework could help improve coordination across regulatory agencies, streamline administrative processes, and integrate MSME support services. Stronger institutional alignment would reinforce existing digital economy initiatives and further position Vietnam as an emerging regional hub for B2C e-commerce exports.

As part of this broader strategy, streamlining domestic regulatory procedures will be crucial to enabling MSME participation in e-commerce exports. Vietnam can complement its existing and newly established FTZs, [TV1.1] [AB1.2] including those in Hai Phong, Da Nang, and Ho Chi Minh City, with **dedicated e-commerce export zones embedded within or alongside these trade hubs.**⁶⁹ These next-generation FTZs are being positioned as integrated trade and logistics hubs, with enhanced customs facilitation, digitalized clearance systems, and stronger port–industrial zone linkages to improve export competitiveness.⁷⁰ However, while FTZs are effective in facilitating export-oriented manufacturing and large-scale trade flows, they are not specifically designed to address the operational needs of MSMEs engaged in e-commerce exports.

- simplified and standardized customs procedures tailored to small-parcel exports;
- integrated VAT processing and refund facilitation, supported by digital documentation systems;
- co-located e-invoicing and regulatory compliance support services; and
- access to specialized logistics providers for cross-border fulfilment.

By integrating regulatory, tax, and logistics services within a single operational ecosystem, such zones could reduce administrative burden, shorten processing times, and lower fixed compliance costs for MSMEs.

Exemplary initiative in China

China's Cross-Border E-commerce Pilot Zones illustrate how purpose-built e-commerce infrastructure and standardized processes can reduce export frictions for MSMEs at scale. Launched in 2015 and now established across more than 160 cities, including Shanghai and Suzhou, the zones integrate logistics services with government-led infrastructure to deliver sustained cost savings for exporters.⁷¹ The zones provide VAT exemptions for retail exports, and single-window digital platforms to accelerate order fulfilment and simplify compliance.⁷² Many zones also host export service centers that provide complementary services, including customs brokerage, packaging, and product inspection, enabling MSMEs to manage multiple export-related processes within a single location.⁷³ Through real-time customs declaration and automated parcel sorting, average export clearance times in some zones have been reduced to approximately one hour.⁷⁴

⁶⁹ Vietnam FTZ (2026), "Vietnam Free Trade Zones (FTZ)." Available at: <https://vietnamftz.vn/>

⁷⁰ Sources include: Vietnam FTZ (2026), "Vietnam Free Trade Zones (FTZ)." Available at: <https://vietnamftz.vn/>; Vietnam News (2025), "Việt Nam establishes first free trade zone in Đà Nẵng." Available at: <https://vietnamnews.vn/economy/1720003/viet-nam-establishes-first-free-trade-zone-in-da-nang.html>; Vietnam News (2025), "HCM City approves free-trade zone in push to become regional economic hub." Available at: <https://vietnamnews.vn/economy/1731685/hcm-city-approves-free-trade-zone-in-push-to-become-regional-economic-hub.html>

⁷¹ Sources include: The State Council of the People's Republic of China (2023). "Chinese Customs Offices See Substantial Results in Facilitating Cross-Border Trade." Available at: https://english.www.gov.cn/news/pressbriefings/202303/01/content_WS63fea411c6d0a757729e766a.html; China Daily (n.d.), Full list of China's cross-border e-commerce comprehensive pilot zones. Available at: <https://www.chinadaily.com.cn/specials/FulllistofChinascross-border-commercecomprehensivepilotzones.pdf>

⁷² Ding et al., Digital safeguards in trade wars: assessing the impact of China's CBEC pilot zone on global supply chain resilience. Available at: <https://www.sciencedirect.com/science/article/abs/pii/S0261560626000148>

⁷³ The State Council of the People's Republic of China (2023). "Chinese Customs Offices See Substantial Results in Facilitating Cross-Border Trade." Available at: https://english.www.gov.cn/news/pressbriefings/202303/01/content_WS63fea411c6d0a757729e766a.html

⁷⁴ The State Council of the People's Republic of China (2023). "Chinese Customs Offices See Substantial Results in Facilitating Cross-Border Trade." Available at: https://english.www.gov.cn/news/pressbriefings/202303/01/content_WS63fea411c6d0a757729e766a.html









While institutional and fiscal arrangements differ across countries, Vietnam could adapt core design principles from this model, such as process integration, service co-location, and digitalized compliance workflows, to develop e-commerce export facilitation mechanisms tailored to domestic conditions and priority product sectors, including fashion and furniture.

5.2. Addressing export-destination barriers identified by Vietnamese MSMEs

While Section 5.1 focuses on resolving domestic regulatory and administrative frictions, this section addresses export-destination barriers reported by furniture and fashion MSMEs in the survey. Respondents indicated that strategic initiatives by governments and e-commerce platforms can play a vital role in alleviating barriers faced in key export destinations. While Vietnam has implemented some support measures, there is scope to draw lessons from peer economies with mature policy frameworks.

Across the Asia Pacific region, governments are deploying targeted interventions to help MSMEs overcome common export-destination barriers to e-commerce participation (Exhibit 9). These initiatives span cost reduction, regulatory facilitation, knowledge building, and capability enhancement, with country-specific programs illustrating different approaches to enabling MSME participation in global digital trade.

Exhibit 9: Vietnamese furniture and fashion MSMEs seek targeted initiatives to address their top export-destination barriers

Barriers targeted	Best practice policy approaches sought by furniture and fashion MSMEs in Vietnam	Percent of surveyed MSMEs that seek the approach, %	Exemplary solutions adopted in peer economies
Cost barriers 	Government grants to subsidize logistics costs	96%	Export Logistics Voucher, Overseas Joint Logistics Center 
Regulatory barriers 	Training and information-sharing sessions on product compliance and certification requirements	98%	Business Training Network 
Knowledge barriers 	Government-industry partnerships to increase awareness of export markets	98%	Japan Store 
Capability barriers 	Online resources for MSMEs to learn about e-commerce exports	95%	Business.govt.nz 

Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis

5.2.1. Addressing cost barriers

Vietnam's current approach

Vietnam tackles cost barriers through targeted subsidies to alleviate export costs for MSMEs. Launched in 2021, Decree 80/2021/NĐ-CP provides a subsidy framework for MSMEs that includes a reimbursement scheme that lowers go-to-market costs for exporting MSMEs.⁷⁵ As part of the decree, eligible firms may be reimbursed up to 50% of expenses for maintaining accounts on e-commerce platforms, capped at VND 50 million (USD 1,900) per year for two years after registration. While these measures reduce some upfront costs, over **86%** of furniture and fashion MSMEs in Vietnam still report facing high cross-border logistics costs when exporting via e-commerce. Consequently, **96%** of surveyed MSMEs in Vietnam across both categories agreed that government grants to subsidize logistics costs would ease the burden of high cross-border expenses.

Exemplary initiative in South Korea

South Korea's Export Voucher Program and Overseas Joint Logistics Centre service go beyond subsidies by combining financial support with guaranteed shipping capacity and shared overseas logistics infrastructure for exporting MSMEs. Launched in 2016 by the Ministry of Trade, Industry and Energy and the Korea Trade-Investment Promotion Agency (KOTRA), the Export Voucher Program covers up to 70% of eligible costs, including international shipping, logistics, and overseas certification.⁷⁶ Recent updates expanded support with vouchers worth KRW 61.1 billion (USD 44.8 million) covering 1,300 firms, along with a partnership with national carrier HMM to guarantee MSMEs shipping space during capacity shortages.⁷⁷ Complementing this, KOTRA's Overseas Joint Logistics Center service enables MSMEs without their own distribution facilities abroad to jointly use warehouses run by over 200 local partner logistics companies in 84 countries, providing storage, packing, and delivery support.⁷⁸ Together, these measures reduce per-shipment costs and improve delivery efficiency, offering a structural model that Vietnam could adapt to lower logistics costs and strengthen MSME price competitiveness in furniture and fashion exports.

5.2.2. Streamlining regulatory barriers

Vietnam's current approach

Vietnam provides national and provincial-level training and advisory initiatives to help MSMEs navigate regulatory complexities. Coordinated by the Vietnam Trade Promotion Agency (VIETRADE) and partner organizations, examples include workshops on EU and USA regulations and guidance for documentation and conformity.⁷⁹ Under VIETRADE's National Trade Promotion Program, such initiatives reached over 6,000 local organizations and MSMEs in 2024.⁸⁰ Complementing these efforts, the Ministry of Industry and Trade (MOIT) provides regular updates on EU import controls, while provincial bodies like ITPC Ho Chi Minh City deliver seminars on export compliance in destinations like Japan.⁸¹ Despite this extensive outreach, **92%** of the surveyed furniture MSMEs and **86%** of the surveyed fashion MSMEs continue to report challenges navigating complex and changing regulations in export destinations. To address this barrier, **98%** of surveyed MSMEs in Vietnam indicated that expanded training and information-sharing sessions on compliance and certification would be highly effective.

Exemplary initiative in China

China's Business Training Network illustrates how a centralized, readily accessible digital platform that consolidates regulatory guidance and export procedures can reduce regulatory barriers faced by MSMEs. Launched in 2013 by the Ministry of Commerce, the platform provides free, on-demand courses on export procedures, customs documentation, product standards, and regulatory updates for key export destinations

⁷⁵ Government of Vietnam (2021), "Decree No. 80/2021/NĐ-CP elaborating the Law on Provision of Assistance for Small and Medium-Sized Enterprises." Available at: <https://thuvienphapluat.vn/van-ban/EN/Doanh-nghiep/Decree-80-2021-ND-CP-elaboration-Law-on-Provision-of-Assistance-for-Small-and-Medium-Enterprises/487551/tieng-anh.aspx>

⁷⁶ Invest Korea (2024), "Korea Gov't's Export Voucher Program Benefits Over 1,000 SMEs." Available at: https://www.investkorea.org/ik-en/bbs/i-465/detail.do?ntt_sn=492747

⁷⁷ KOTRA (2025), "Investment News." Available at: https://www.investkorea.org/ik-en/bbs/i-465/detail.do?ntt_sn=492866

⁷⁸ Sources include: KOTRA (2025), "2025 해외공동물류센터사업." Available at: <https://www.kotra.or.kr/subList/20000020753/subhome/bizAply/selectBizMntInfoDetail.do?cpbizYn=N&dtlBizId=CBOTLS24112900000001>; KOTRA (n.d.), Introduction of Overseas Logistics Network Service. Available at: https://aws-a.medias-ccif.org/fileadmin/coree/user_upload/2_Introduction_of_Overseas_Logistics_Network_Service.pdf

⁷⁹ Vietnam News (2024), "Businesses urged to cash in on tariff preferences under VN's trade deals." Available at: <https://vietnamnews.vn/economy/1726021/businesses-urged-to-cash-in-on-tariff-preferences-under-vn-s-trade-deals.html>

⁸⁰ VIETRADE (n.d.), "National Trade Promotion Program." Available at: <https://vietrade.gov.vn/en/category?id=92>; VnEconomy (2025), "Trade promotion to target new and emerging markets." Available at: <https://en.vneconomy.vn/trade-promotion-to-target-new-and-emerging-markets.htm>

⁸¹ Sources include: VietnamPlus (2024), "HCM City to Host Vietnam-EU Cooperation Forum 2024." Available at: <https://en.vietnamplus.vn/hcm-city-to-host-vietnam-eu-cooperation-forum-2024-post301235.vnp>; Vietnam News (2024), "Seminar Mulls Strategies to Boost Exports to Japan." Available at: <https://vietnamnews.vn/economy/1720249/seminar-mulls-strategies-to-boost-exports-to-japan.html>; Klinova (2024), "CBAM compliance: A green pathway for Vietnamese businesses into the European market." Available at: <https://klinova.vn/klinova39s-news/cbam-compliance-a-green-pathway-for-vietnamese-businesses-into-the-european-market.html>

such as ASEAN, South Korea, and Australia.⁸² It offers over 73 modules delivered by industry experts and academics focusing on export and e-commerce enablement, ensuring MSMEs can reliably access guidance from a single source.⁸³ Previous training initiatives on the platform, such as RCEP awareness programs, have proven highly effective, reaching over 66,000 MSME participants within a year of launch.⁸⁴ Vietnam could transition to a structured digital learning ecosystem to centralize regulatory guidance, scale training delivery, and bolster MSME readiness for e-commerce exports.

5.2.3. Closing knowledge gaps

Vietnam's current approach

Vietnam is bridging e-commerce export knowledge gaps through strategic public-private partnerships.

In 2025, VIETRADE partnered with Amazon Global Selling Vietnam to launch the “V-Brands Go Global with Amazon” initiative, training 1,000 Vietnamese enterprises across 20 courses and supporting 30 national brands in developing overseas expansion strategies.⁸⁵ Amazon Global Selling also participated as an exhibitor in trade fairs such as the International Sourcing Expo 2024 and the 2025 Autumn Fair organized [TV2.1][AB2.2] by the MOIT, showcasing made-in-Vietnam products and offering workshops to give MSMEs hands-on exposure to global marketplaces.⁸⁶ Despite these efforts, **88%** of [TV3.1][AB3.2] the surveyed furniture and fashion MSMEs in Vietnam remain unfamiliar with e-commerce export strategies, with **98%** of surveyed MSMEs emphasizing the need for deeper government–industry partnerships to strengthen their awareness of export destinations.

Exemplary initiative in Japan

Japan External Trade Organization's (JETRO) collaboration with Amazon through the Japan Store initiative exemplifies a public–private program that combines hands-on support on a range of topics with market participation to close knowledge gaps.

Launched in 2017, the Japan Store provides curated storefronts on Amazon's international marketplaces, enabling MSMEs to access overseas customers seeking Japanese products.⁸⁷ The program connects first-time exporters with Amazon Global Selling representatives to close knowledge gaps on topics like regulatory and tax compliance in export destinations.⁸⁸ The program also assists MSMEs with targeted digital marketing to boost e-commerce export sales.⁸⁹ In 2024, the initiative supported around 1,100 Japanese businesses with export revenue from the USA and UK growing by 15% since 2023.⁹⁰ In addition to training on e-commerce export operations and product positioning, JETRO provides listing support, logistics facilitation, and analytics, helping MSMEs optimize export procedures.⁹¹ Vietnam could adopt a similar approach to pair structured training support with direct marketplace access, allowing MSMEs to gain practical experience across a range of domains, reduce knowledge gaps, and accelerate participation in B2C e-commerce exports.

5.2.3. Strengthening MSME capabilities

Vietnam's current approach

To bolster MSME capabilities, Vietnam consolidates critical resources on exports and facilitates export training webinars, helping businesses navigate global e-commerce and export procedures more efficiently.

Launched in 2017 by the MOIT in collaboration with the Ministry of Planning and Investment, the Trade Information Portal consolidates export-related resources to help MSMEs navigate export procedures and destination-specific requirements.⁹² It provides customs documentation templates and market intelligence drawn from national trade promotion networks, supporting MSMEs in understanding demand trends and

⁸² Ministry of Commerce (China) (2025), “培训课程 – 商务培训网.” Available at: <https://training.mofcom.gov.cn/pxkc.html>

⁸³ Ministry of Commerce (China) (2025), “培训课程 – 商务培训网.” Available at: <https://training.mofcom.gov.cn/pxkc.html>

⁸⁴ Ministry of Commerce (2021), “中国商务部RCEP中小企业专题培训受企业点赞.” Available at: https://sg.mofcom.gov.cn/zcxj/zxhzzc/art/2021/art_bf7a77bd32a945b69edb472af4827166.html

⁸⁵ Sources include: VnEconomy (2025), “New initiative serves as Launchpad for Vietnamese brands globally.” Available at: <https://en.vneconomy.vn/new-initiative-serves-as-launchpad-for-vietnamese-brands-globally.htm>; Vietnam News (2024), “Amazon and Viet Nam join hands to elevate national brands on the global stage.” Available at: <https://vietnamnews.vn/economy/1721924/amazon-and-viet-nam-join-hands-to-elevate-national-brands-on-the-global-stage.html>

⁸⁶ Sources include: Vietnam News (2024), “Amazon and Viet Nam join hands to elevate national brands on the global stage.” Available at: <https://vietnamnews.vn/economy/1721924/amazon-and-viet-nam-join-hands-to-elevate-national-brands-on-the-global-stage.html>; MOIT (2024), “Amazon Global Selling Widens the Door for Vietnamese Goods.” Available at: <https://goglobal.moit.gov.vn/en/amazon-global-selling-mo-rong-cua-cho-hang-viet-nam.html>; MOIT (2025), “Deputy PM Bui Thanh Son reviews preparations for 2025 Autumn Fair.” Available at: <https://moit.gov.vn/en/support-services/70-years-of-industry-and-trade/deputy-pm-bui-thanh-son-reviews-preparations-for-2025-autumn-fair.html>

⁸⁷ Amazon (2024), “Japan Store.” Available at: https://sell.amazon.co.jp/en/grow/promotions/japan-store?ref_=sdjp_grow_ags_js

⁸⁸ Amazon (2024), “Japan Store.” Available at: https://sell.amazon.co.jp/en/grow/promotions/japan-store?ref_=sdjp_grow_ags_js

⁸⁹ Amazon (2024), “Japan Store.” Available at: https://sell.amazon.co.jp/en/grow/promotions/japan-store?ref_=sdjp_grow_ags_js

⁹⁰ Netshop (2025), “Amazonが英・米で展開する『JAPAN STORE』。日本事業者1100社が出品、売上高は15%増の9200万ドル。” Available at: <https://netshop.impress.co.jp/node/13897>

⁹¹ JETRO (n.d.), “Helping Japanese SMEs Expand Their Businesses Overseas.” Available at: <https://www.jetro.go.jp/en/jetro/activities/business/>

⁹² Vietnam Trade Portal (n.d.), “Official website.” Available at: <https://www.vietnamtradeportal.gov.vn/>

compliance expectations in export destinations.⁹³ In parallel, VIETRADE's Digital Trade Promotion initiative delivers periodic webinars aimed at improving export readiness, including sessions on the use of e-commerce platforms for exporting.⁹⁴ Despite these resources, significant capability gaps remain, with **87%** of surveyed furniture MSMEs and **85%** of surveyed fashion MSMEs reporting shortages in manpower, skills, and partnerships. Consequently, **95%** of surveyed MSMEs in Vietnam indicated that online resources tailored to e-commerce export would be effective in addressing these gaps.

Exemplary initiative in New Zealand

New Zealand's Business.govt.nz (formerly Digital Boost) program illustrates how interactive tools, checklist templates, and on-demand video tutorials can complement information portals by translating guidance into practical execution. Operated by the Ministry of Business, Innovation and Employment (MBIE), the program offers free, on-demand video tutorials and interactive modules covering e-commerce setup, digital marketing, logistics, and export compliance.⁹⁵ Beyond standard tutorials on e-commerce and logistics, the platform provides interactive tools such as export checklists, cashflow forecasting tools, and diagnostic resources to identify potential trademark or domain name clashes.⁹⁶ These features enable MSMEs to mitigate risks and manage the financial complexities of international expansion independently and at their own pace. Within one year of launch, the platform reached over 40,000 MSMEs, with evaluations showing that 17% of MSMEs reported higher revenue after participating.⁹⁷ By adopting a similar model, Vietnam could complement its existing training initiatives and Trade Information Portal by strengthening the technical proficiency and practical skills of furniture and fashion MSMEs, supporting more sustainable e-commerce export growth.



⁹³ Vietnam Trade Portal (n.d.), "Official website." Available at: <https://www.vietnamtradeportal.gov.vn/>

⁹⁴ Sources include: VIETRADE (n.d.), "Digital trade promotion." Available at: <https://vietrade.gov.vn/category?id=39>; VIETRADE (2025), "Training Series: From 0 to Export Hero 101." Available at: <https://vietrade.gov.vn/news-detail/1483?newsId=1483&categoryId=39>

⁹⁵ Sources include: Business.govt.nz (n.d.), "About us." Available at: <https://www.business.govt.nz/about-us>; New Zealand Ministry of Business, Innovation and Employment (2024), "Digital Boost Evaluation Research." Available at: <https://www.mbie.govt.nz/business-and-employment/business/support-for-business/better-for-business/research-and-reports/digital-boost-evaluation-research>

⁹⁶ Business.govt.nz (n.d.), "About us." Available at: <https://www.business.govt.nz/about-us>

⁹⁷ Sources include: OECD Observatory of Public Sector Innovation (n.d.), "Digital Boost (Small Business Digital Enablement) Programme." Available at: <https://oecd-opsi.org/innovations/digital-boost-small-business-digital-enablement-programme/>; eCommerceNews New Zealand (2021), "40,000 NZ small businesses reap rewards of Digital Boost programme." Available at: <https://ecommercenews.co.nz/story/40-000-nz-small-businesses-reap-rewards-of-digital-boost-programme>

6. The way forward

Looking forward, Vietnam stands at a pivotal moment in scaling B2C e-commerce exports, with MSMEs in fashion and furniture at the center of this growth. These sectors have already shown strong momentum, supported by Vietnam's strong manufacturing base, superior craftsmanship, and growing adoption of digital tools for global trade. With coordinated efforts from government and industry to strengthen the ecosystem through supportive policies and targeted capability-building, Vietnam can enable MSMEs to capture greater value, reach a wider base of international consumers, and reinforce its position as a leading player in global e-commerce.



7. Appendix: Methodology and data sources

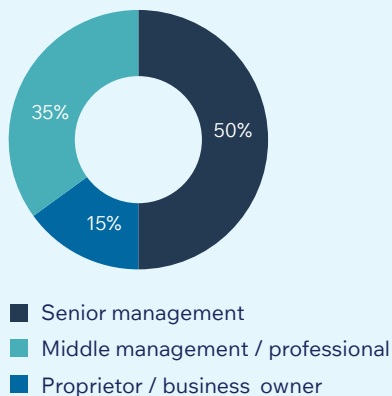
7.1. Access Partnership survey of MSMEs on e-commerce

Access Partnership conducted a survey of 150 MSMEs engaged in B2C e-commerce for furniture products and 150 MSMEs engaged in e-commerce for fashion products in Vietnam in September 2025. The survey was designed to capture participation trends, key motivations, barriers, and desired policy solutions related to e-commerce exports.

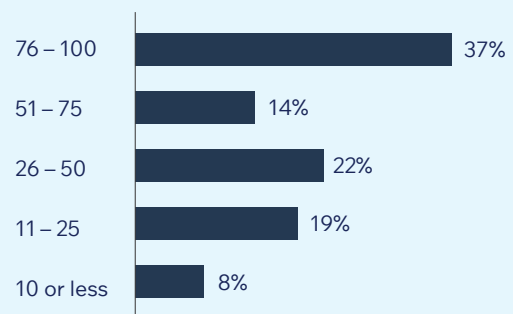
The survey results are statistically significant at a 95% confidence level with a 6% margin of error, providing robust insights into how Vietnamese MSMEs are using e-commerce to export furniture and fashion products.

Exhibit A1: Respondent profile

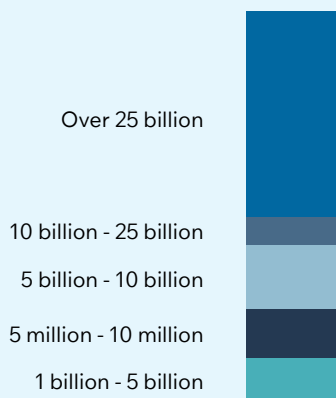
Role of respondent



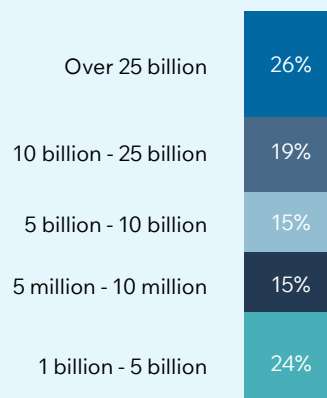
Number of employees in respondent's business



Total annual revenue of respondent's business (VND)



Total annual B2C e-commerce revenue of respondent's business (VND)



Note: Sums may not add up to 100% due to rounding error.

Source: Access Partnership survey of 150 MSMEs engaged in e-commerce for furniture products and 150 for fashion items in Vietnam, 2025; Access Partnership analysis

7.2. Export value by product category in 2024 and 2029

The export revenue estimates for furniture and fashion products were developed using UN Comtrade data at the Harmonized System (HS) 4 level.⁹⁸ The modelling followed three steps:

- Step 1: Vietnam's five-year export data (2019–2024) was tagged to assign products into categories such as “Furniture” and “Fashion” and to calculate each category's share of total exports.
- Step 2: The 2024 export revenue for each category was estimated using Vietnam's total annual export revenue and the share calculated in Step 1.
- Step 3: Projections for 2029 were made by applying the historical five-year compound annual growth rate (CAGR) from the 2019–2024 period to the 2024 revenue figure.

This approach produced the modelled estimates for the total export revenues of furniture and fashion products in 2024 and 2029.

7.3. Projected growth of e-commerce exports by product category from 2024 to 2029

Projected growth rates for B2C e-commerce exports of furniture and fashion products were derived from Access Partnership's MSME survey, where respondents indicated their expected five-year growth in e-commerce export sales. The resulting category-level growth rates were validated against historical export trends to ensure that the results are realistic.

⁹⁸ United Nations Comtrade (n.d.), “Comtrade+ Trade Flow Database.” Available at: <https://comtradeplus.un.org/TradeFlow>

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