



No.: 1204/CV.CMG

Ca Mau, April 12, 2025

(Re: Camimex's export market)

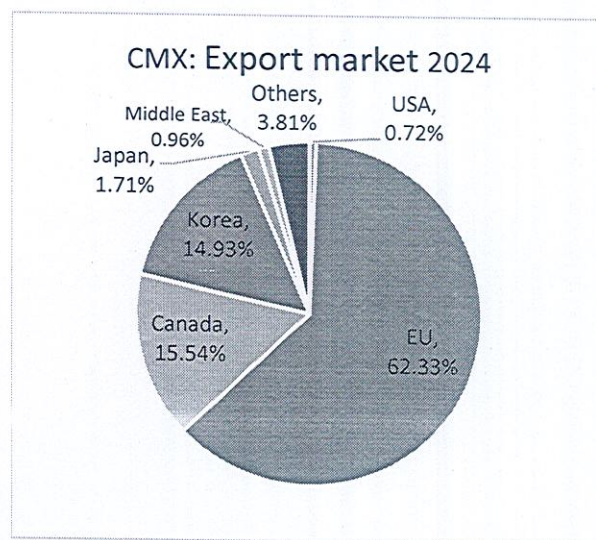
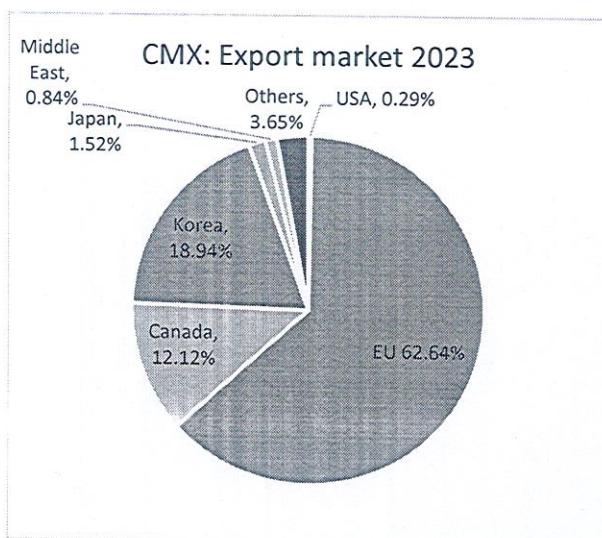
To: CAMIMEX GROUP JOINT STOCK COMPANY SHAREHOLDERS

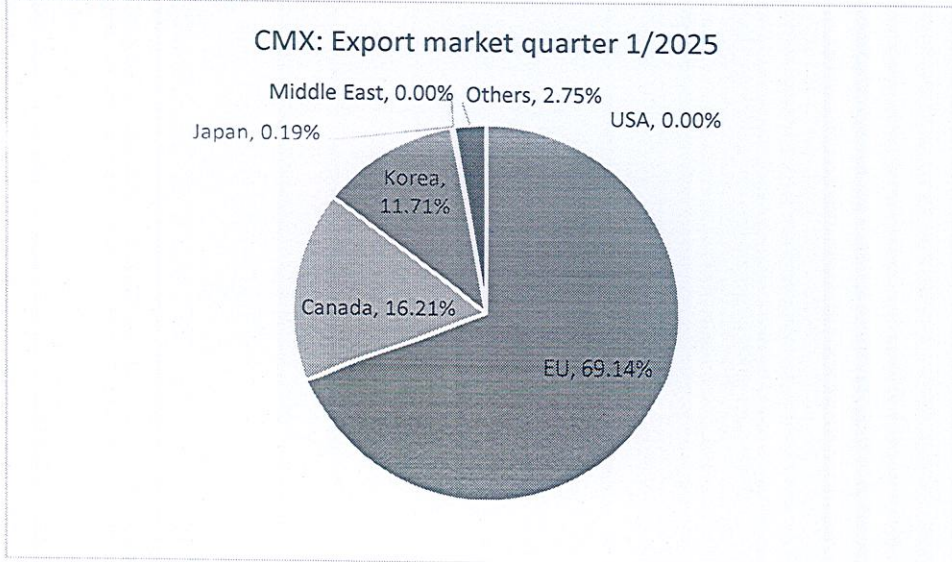
First of all, on behalf of the Board of Directors of Camimex Group Joint Stock Company, I would like to express my sincere gratitude to the Shareholders for your continued support and trust in the company's sustainable development over the years.

Recently, the Vietnamese stock market, including Camimex's shares, has been affected by the news that the US imposed a 46% tax on some imports from Vietnam. This has led to a negative reaction on the stock exchange, with our shares hitting the floor price in recent days. I understand that Shareholders may be concerned about the impact of this news on the company's operations and the value of the share. Therefore, I would like to clarify some key points to help Shareholders better understand the Company's operations.

1. Camimex is currently not dependent on the US market:

Previously, the US market accounted for over 50% of Camimex's export sales. However, since 2015, Camimex has actively restructured, shifting its focus to the European, Korean, Japanese, and Canadian markets, with almost no sales to the US market. Our main revenue comes from key markets such as Europe, Korea, Canada and Japan, accounting for about 95% of the total export sales – these markets are still maintain stable trade relations and are not affected by the new US tax policy. This means that Camimex's core business operations are not directly affected by this decision.





2. Strong business performance:

In 2024, Camimex achieved positive revenue and maintain stable growth from key markets. In the first quarter of 2025, we will continue to record positive results thanks to long-term contracts signed with partners in Europe, Japan and Canada. Accordingly, export sales in the first quarter of 2025 reached 19.66 million USD, 2.15 times higher than the same period last year. Export sales in April are expected to be 2.5 times higher than the same period in 2024, and the following months with existing contracts are double compared to the same period last year.

3. Response strategy:

Although not directly impacted, we still closely monitor the global trade situation to adjust our strategy if necessary. Camimex is accelerating market diversification and improving product quality to strengthen our competitive position, ensuring long-term benefits for Shareholders.

I would like to reaffirm that Camimex's core values remain unchanged. The current volatility is only temporary and does not reflect the company's true potential. I urge Shareholders to maintain their trust and stand with us to overcome this short-term turbulent period. With your support, Camimex will continue to grow strongly and bring worthy value to all Shareholders.

Once again, thank you for your patience and trust. I look forward to meeting you at the upcoming Annual General Meeting to share more about the future direction.

Sincerely yours,

Recipient:

- As above;
- Filed in the Document Department, Accounting Department;
- Information disclosure.

GENERAL DIRECTOR



Huynh Van Tan