

FAO Regional Workshop on Opportunities and Challenges in Economic and Post-harvest Issues Related to Market Access for Fisheries and Aquaculture Products

Bali, Indonesia
1 - 3 October 2024

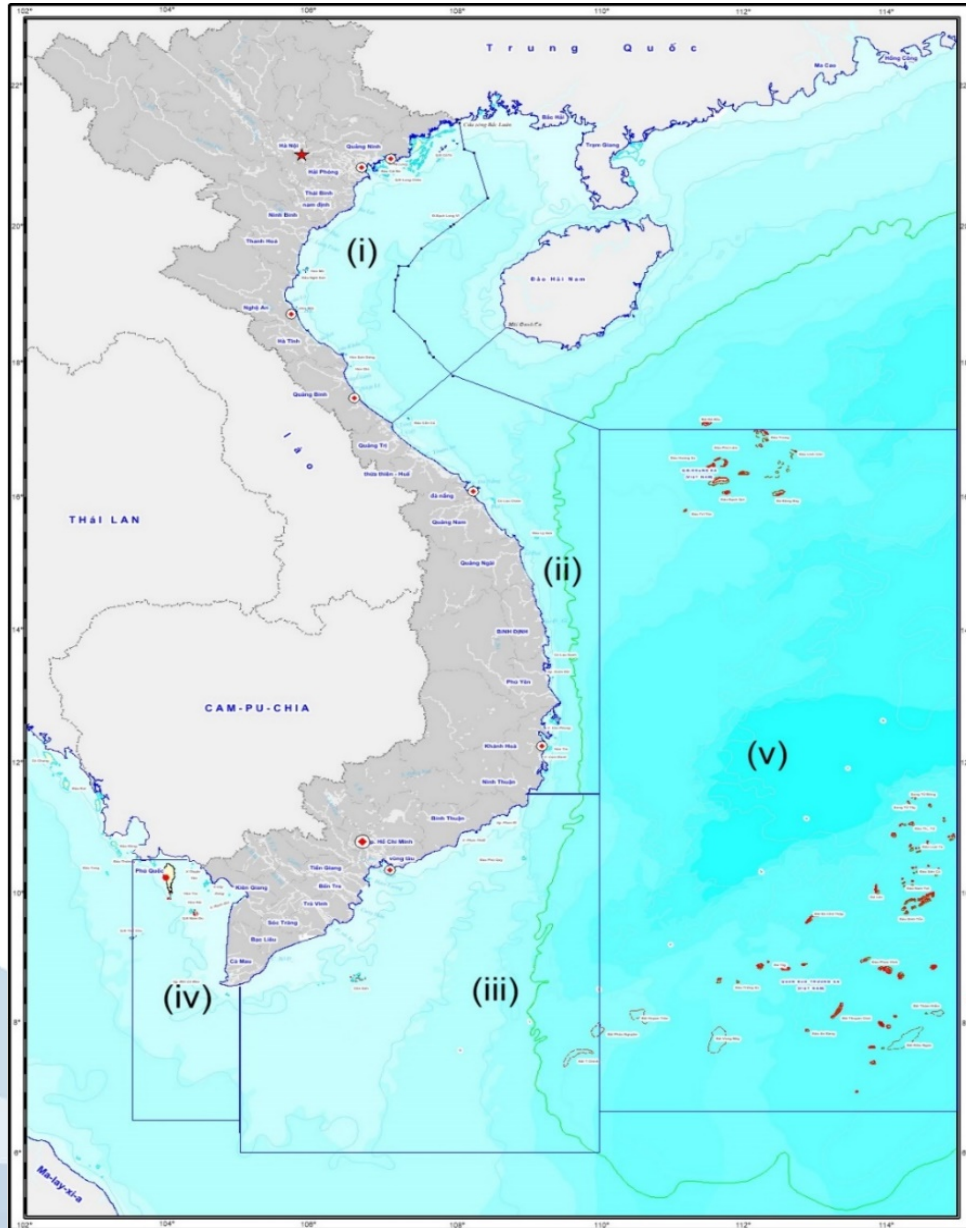
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OVERVIEW OF VIETNAM'S FISHERIES

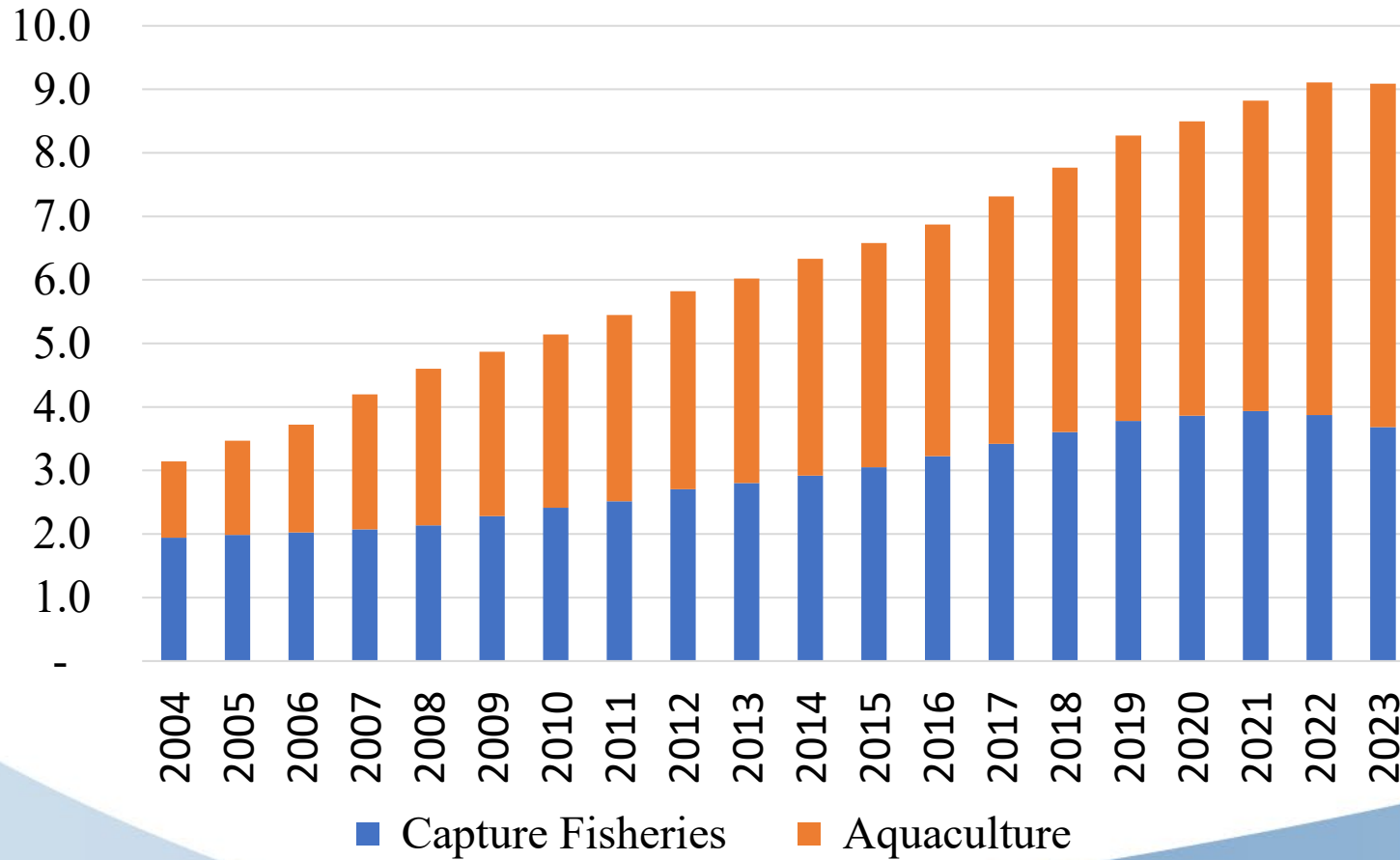


- Vietnam has a coastline of 3,260 km long and an Exclusive Economic Zone of over 1 million km² and more than 4,000 islands and archipelagos; a dense system of rivers and lakes.
- Vietnam is a country with a relatively large number of fishing vessels in Southeast Asia (2023: 86,000 vessels)
- Diverse types of ecosystems: freshwater, brackish water, saltwater; industrial aquaculture, marine aquaculture and reservoir aquaculture.
- Seafood trade: domestic consumption and export.

1. Production and Trade of Viet Nam

1.1. Fisheries Production of Vietnam

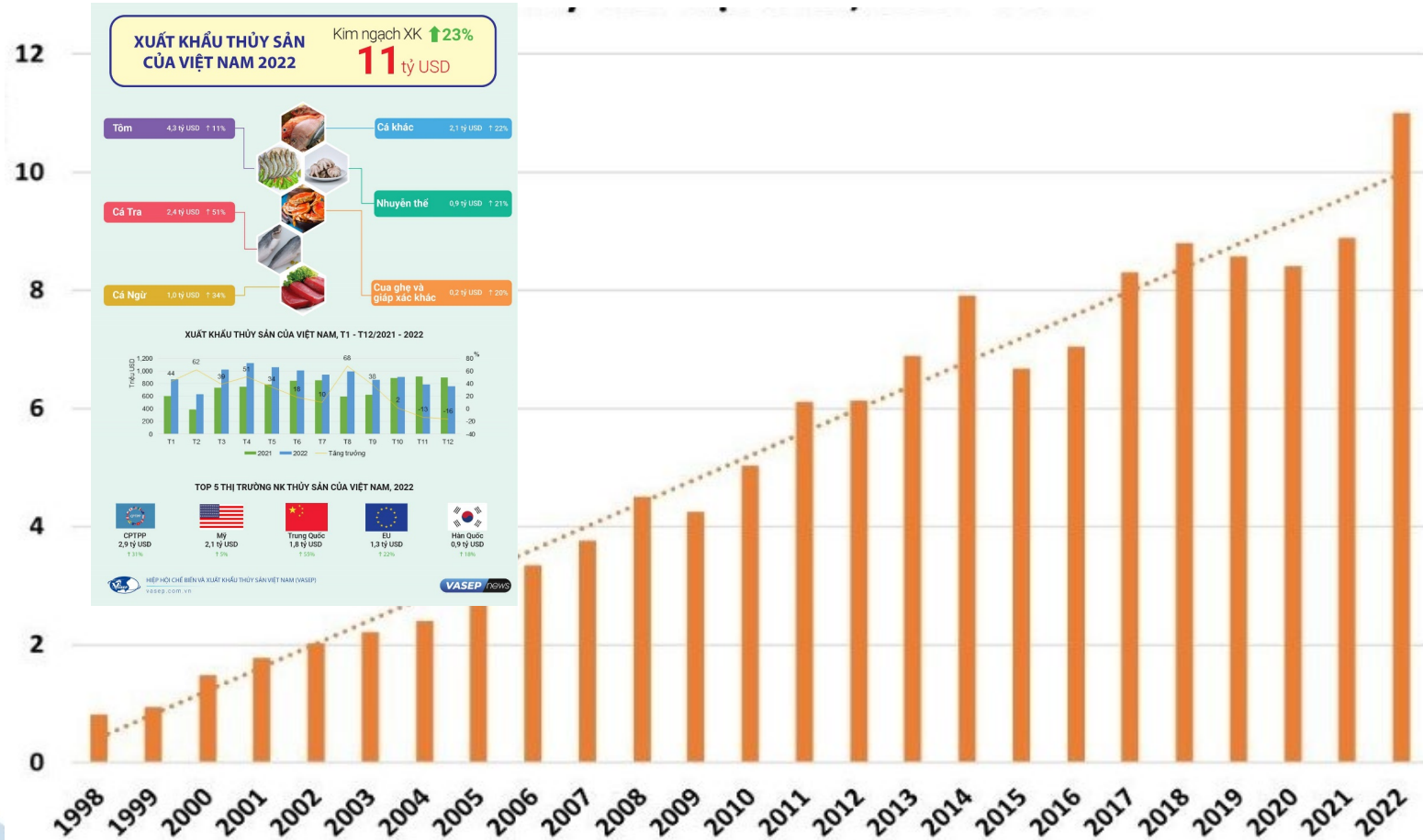
Fisheries production of Vietnam (million MT)



- In 2023: Total fisheries production: 9.3 million MT
Aquaculture: 5.45 million tons;
Capture: 3.85 million tons.
- 2004-2023: aquaculture/fisheries ratio increasing
Aqua. production (56-58%)
Cap. Fisheries (42-44%)
- Average growth rate: 3-4.5%/year.

1. Production and Trade of Viet Nam (Next)

1.2. Fisheries Export Revenue



- Fisheries export turnover in 2023: 9.2 billion USD. In there:
 - + Pangasius: 2.35 billion USD,
 - + Shrimp: 4.2 billion USD,
 - + Seafood: 2 billion USD and other objects 0,65 billion USD.
- Vietnamese seafood has been exported to more than 170 countries and territories.
- Some major seafood import markets from Vietnam are: EU, US, Korea, China,...

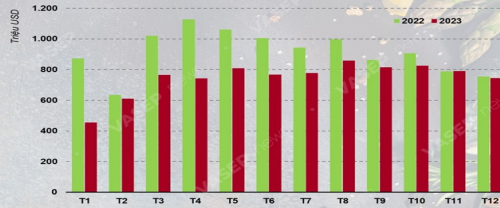
1. Production and Trade of Viet Nam (Next)

1.2. Fisheries Export Revenue

XUẤT KHẨU THỦY SẢN VIỆT NAM 2023

Kim ngạch XK

9 tỷ USD
↓18%



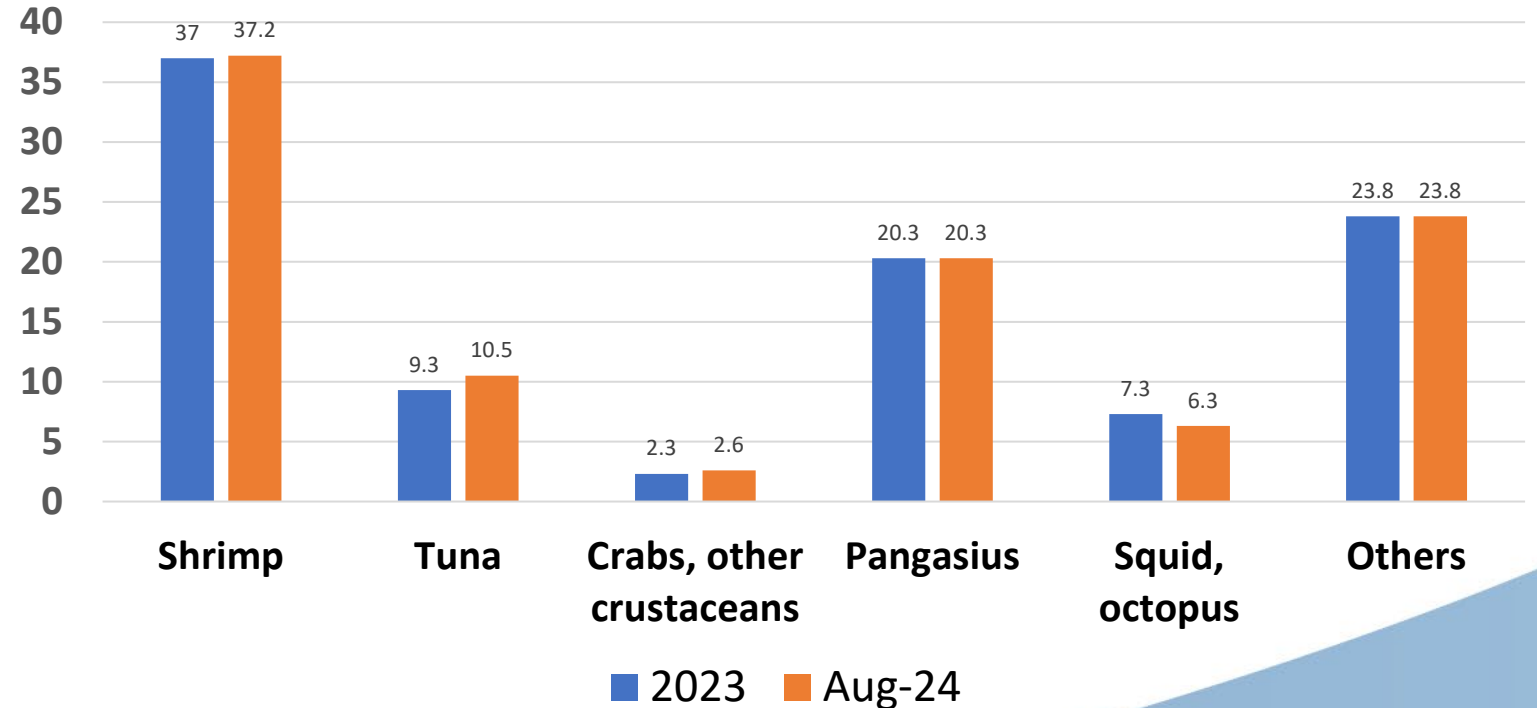
Cơ cấu sản phẩm XK



HIỆP HỘI CHẾ BIẾN VÀ XUẤT KHẨU THỦY SẢN VIỆT NAM
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Ratio of export turnover value of different fisheries product groups (%)



Export turn over value:

2023: 9.2 Billion USD, (-) 17,8% YoY

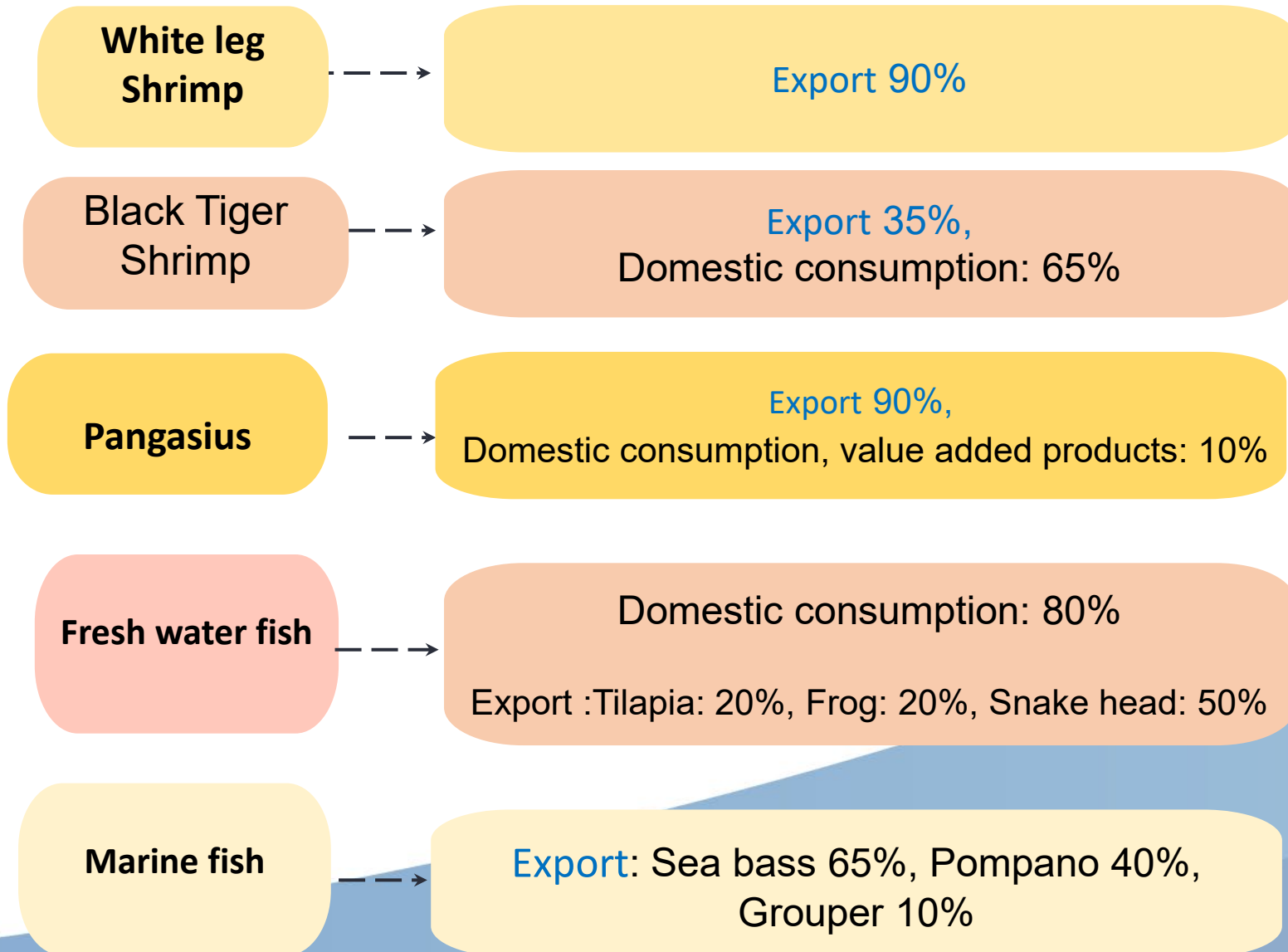
First 8 months of 2024: 6.3 billion USD, (+) 9% YoY

-Pangasius and shrimp account for more than 70% of the export market share

1. Production and Trade of Viet Nam (Next)

Markets - Distributions

- ❑ Shrimp, Pangasius: Major commodity,
- ❑ Red Tilapia, black tilapia:
 - *Frozen whole fish, fillet*
 - *Domestic consumption is tending to increase faster than exports*
- ❑ Frog and snake head fish: Cambodia market
- ❑ 5 major markets: US, EU, Japan, Korea, China



2. SSF, Women and Youth in Fisheries and Aquaculture

- Total number of workers in the fisheries industry is about 5 million workers. Of which:
 - Fishing: About 600,000 fishermen working on fishing boats (mainly man and young people).
 - Aquaculture and logistics services, trade: 4,400,000 people
- In general, female are major work in seafood processing factories and fishery service areas.
- It is hard to work in fisheries industry, so most of the workers are young.



3. Production, Distribution and Trade – Challenges, Bottlenecks and Barriers

- The large number of fishing vessels, especially small fishing vessels operating inshore.
- Many small-scale, household aquaculture models are difficult to manage and develop on a commercial scale.
- The education and awareness of fishermen and aquaculture farmers are still low, limiting the application of new technology.
- Barriers on anti-dumping taxes, protection policies, technical barriers, health certification or traceability of fisheries products are challenges for Vietnam's fisheries industry.
- Requirement from export markets: registration, health certification, low CO2 emission, animal welfare...



4. Additional Information

- Vietnam has issued the Strategy for Vietnam's Fisheries Development to 2030, with a vision to 2045 (Decision No. 339/QĐ-TTg), with the goal of: "Developing fisheries into an important economic sector of the country, producing **large-scale of goods** associated with industrialization - modernization, **sustainable development** and proactive adaptation to climate change; having a reasonable structure and form of production organization, high productivity, quality and efficiency; having a prestigious brand, competitiveness and international integration; constantly improving the material and spiritual life of the people, ensuring social security; .."
- This will be an important orientation for Vietnam to develop the fisheries industry now and in the future.



**Thank you for
your attention!**

