VIETNAM FISHERIES
Processing and Exporting Industry

Vietnam Association of Seafood Exporters and Producers

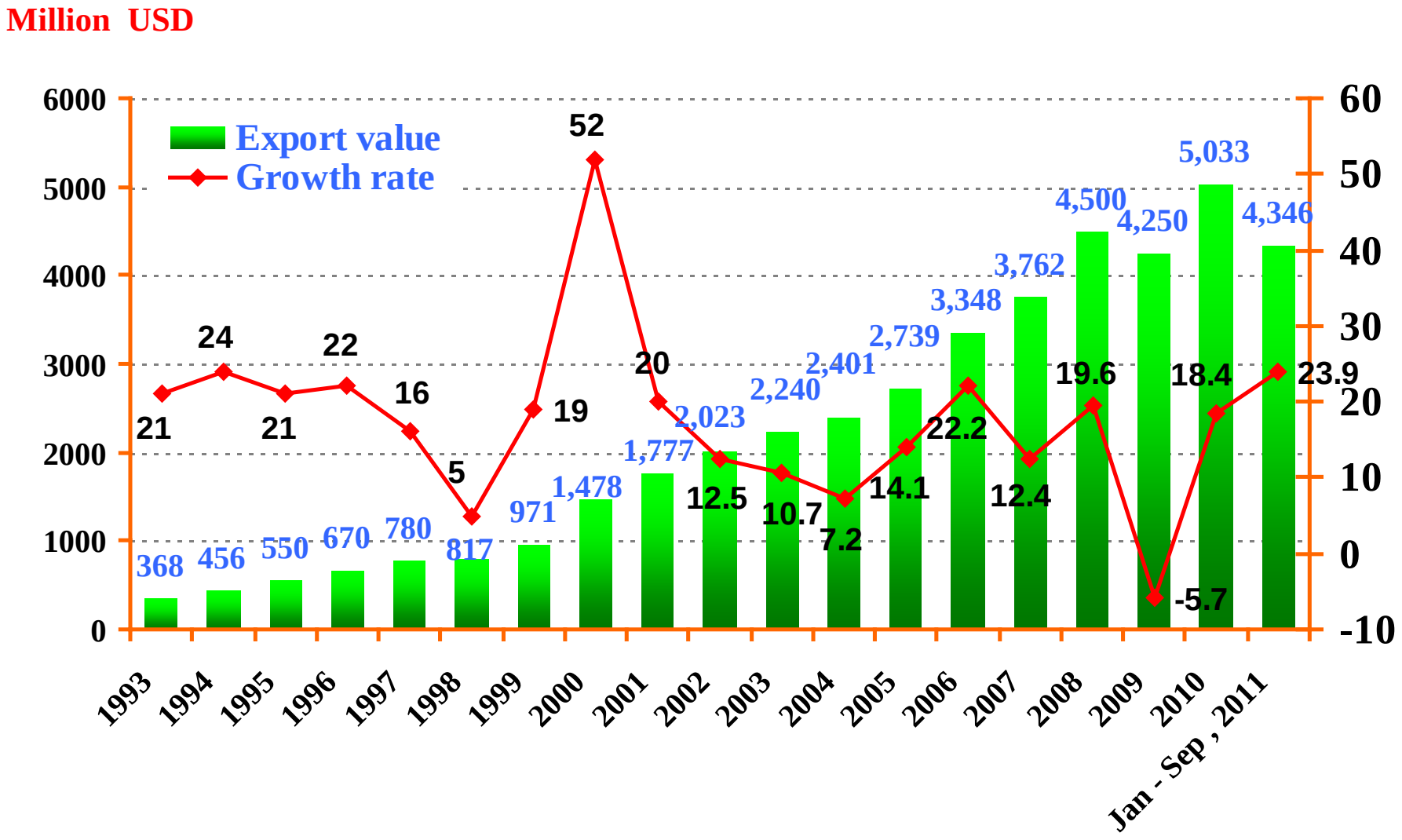
(VASEP)

SIAL MIDDLE EAST – ABU DHABI 2011

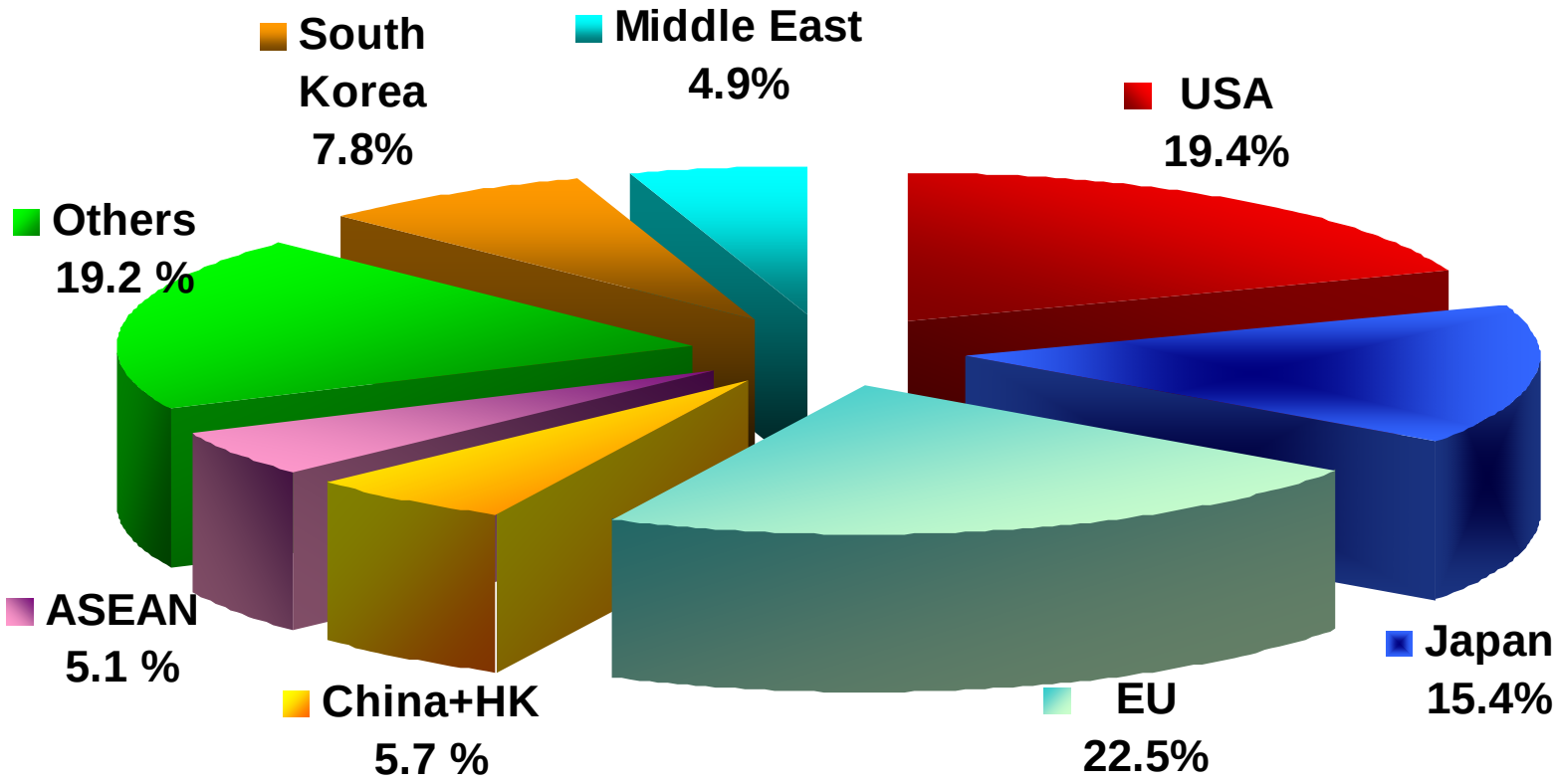
Vietnam Seafood Processing Industry

- More than 520 seafood processing plants (industrial)
- More than 400 freezing factories, daily capacity 7,500 MT
- 383 factories qualified for exporting to the EU (compared to 1999: 17 only)
- 500/520 plants are meeting national standards of hygiene and safety, including HACCP, GMP, SSOP
- Processed volume (2010) over 1,500,000 MT
- Product diversification enlarged
- Ratio of value-added products is increasing, many accepted by supermarket chains in the US, EU & Japan
- Shortage of raw materials bigger and bigger

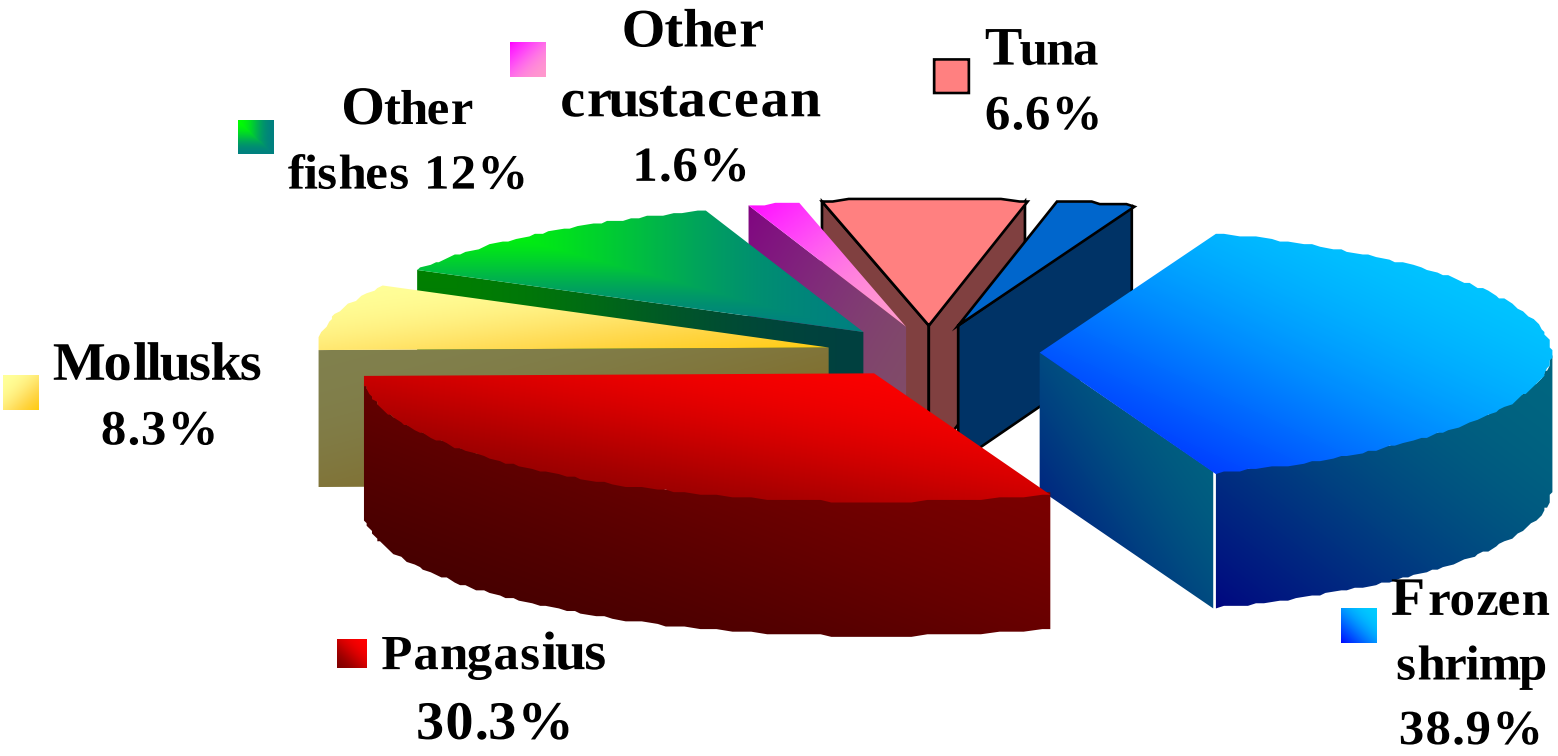
Vietnam Seafood Export



Export Markets Structure
Jan – Sep. 2011
(By Value)



Export Products Structure by Jan – Sep 2011
(By Value)



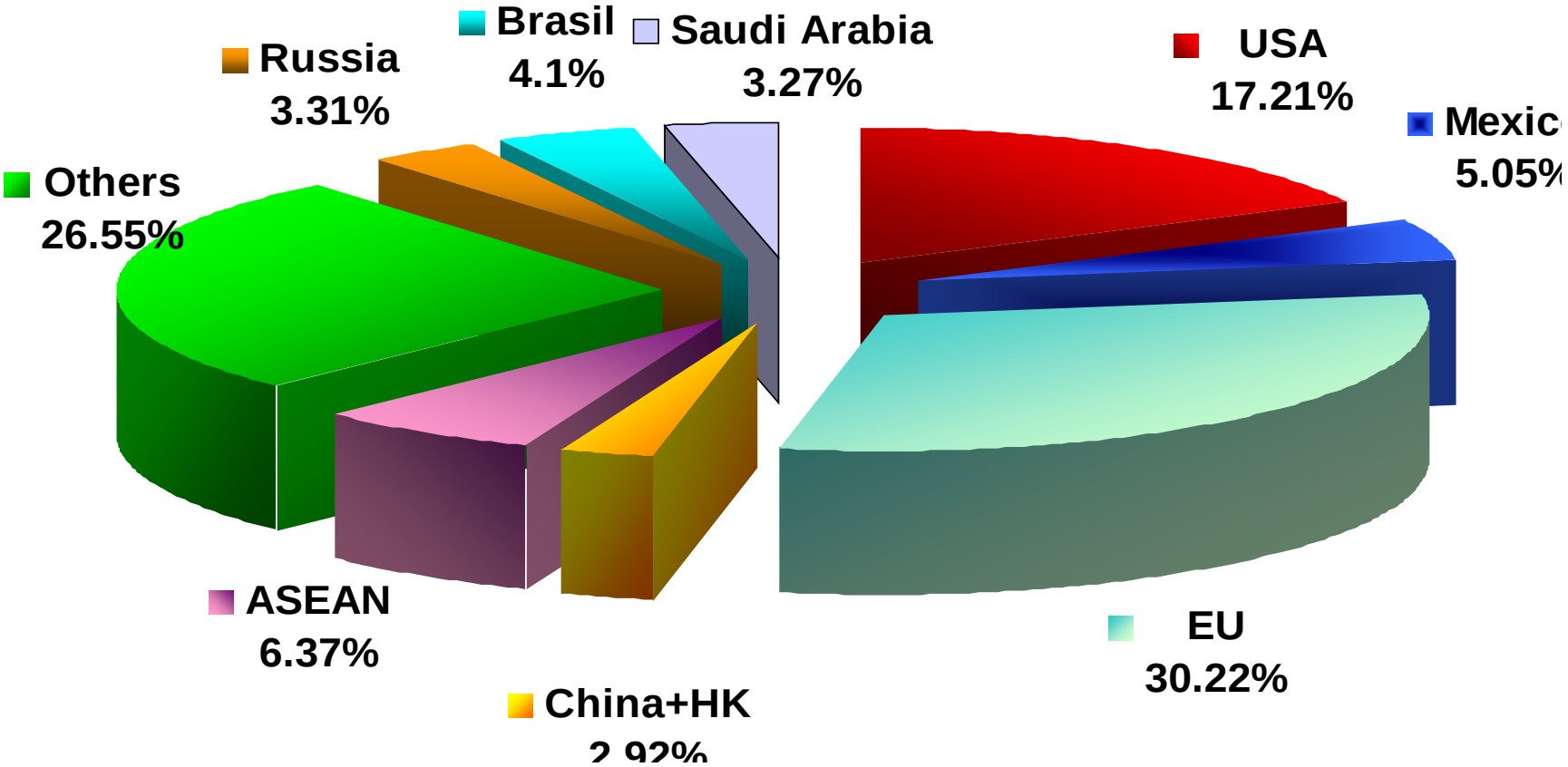
PANGASIUS

Vietnam Pangasius Success Story

In 10 years 2001-2010, Vietnam *Pangasius*:

- **Farming areas increased 5 times, reached 6,000 ha**
- **Annual commercial production of raw fish increased 36 times, from 37,500 MT to 1,350,000 MT**
- **Volume of exported *Pangasius* fillets jumped-up more than 40 times, from 17,000 MT to over 660,000 MT.**
- **Export revenue increased 35 times, from US$ 40 mill. to US$ 1,427 mill.**
- **Number of export markets increased from very few in Asia to more than 140 countries and territories, in all continents.**

Pangasius Markets Structure, from Jan - Sep 2011
(By Value)



Shrimp Developement

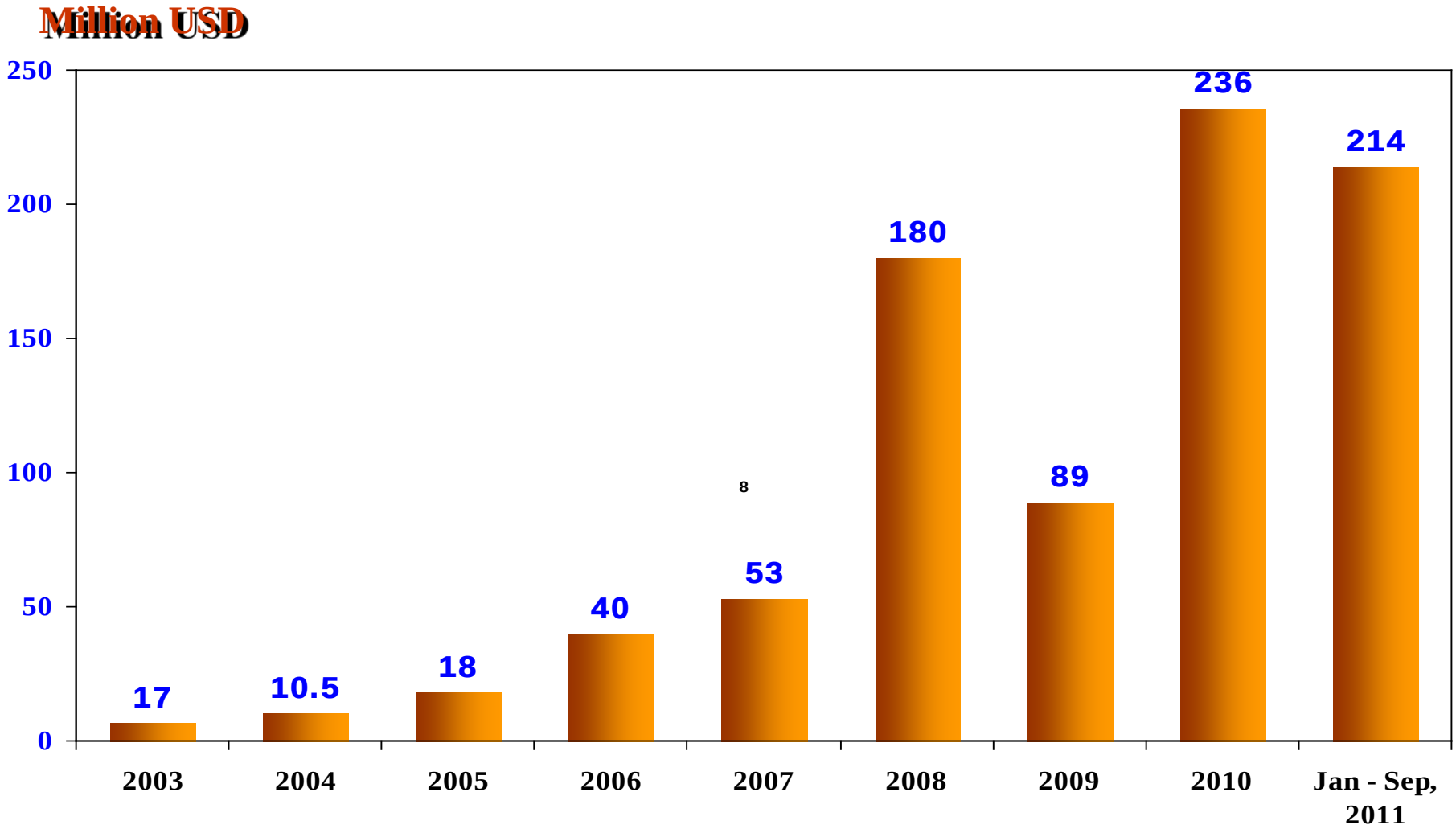
In 10 years 2001-2010, Vietnam *Shrimp*:

- **Annual commercial production of raw shrimp increased 5 times, from 93.500 MT to 450,000 MT**
- **Export revenue increased 3 times, from US$ 662 mill. to US$ 2,106 mill.**
- **Number of export markets increased from very few in Asia to nearly 100 countries and territories, in all continents.**
- **2 main kinds of shrimp: Black tiger and Vanamei**

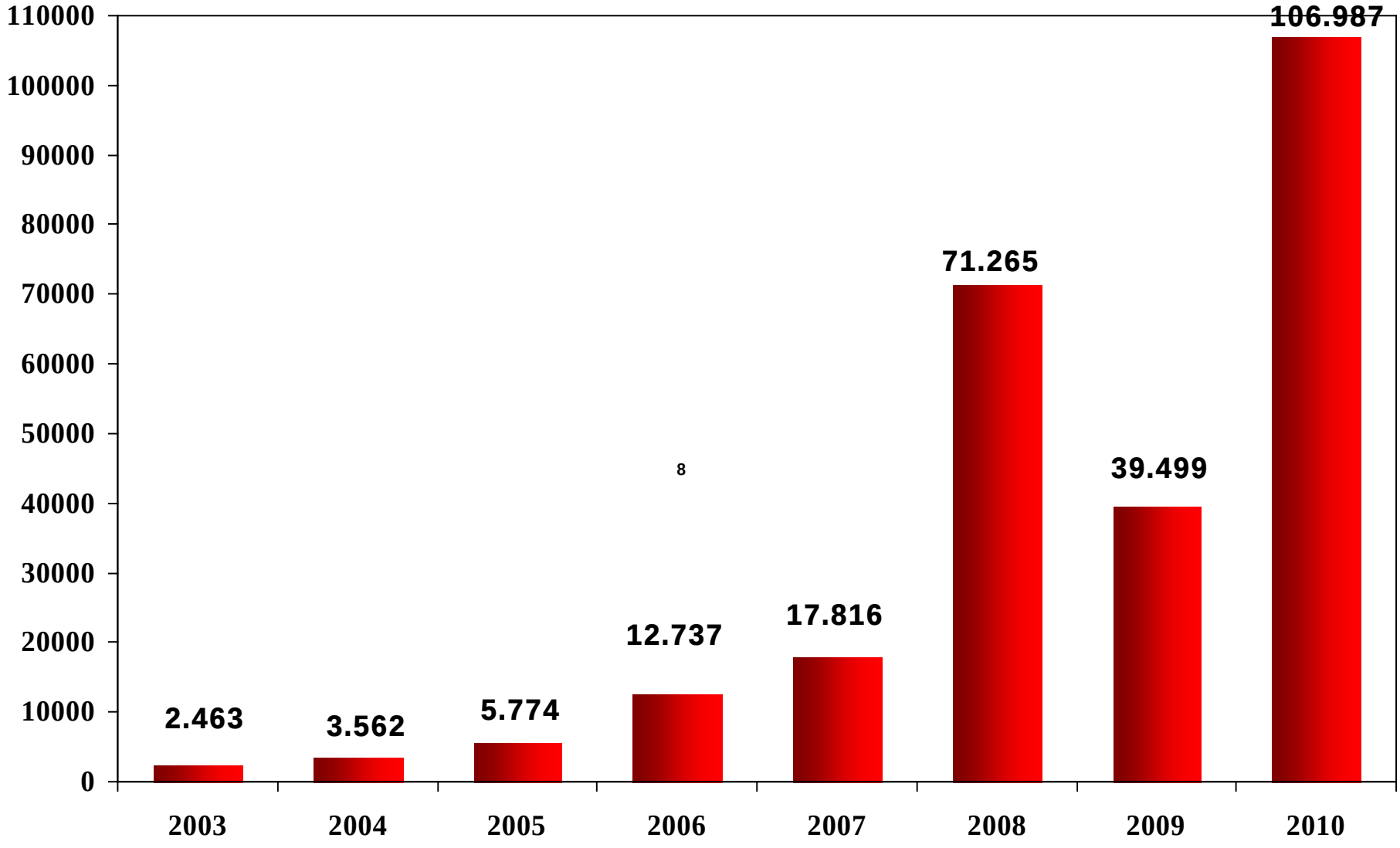
Middle East Region

Seafood Export Value to the Middle East,

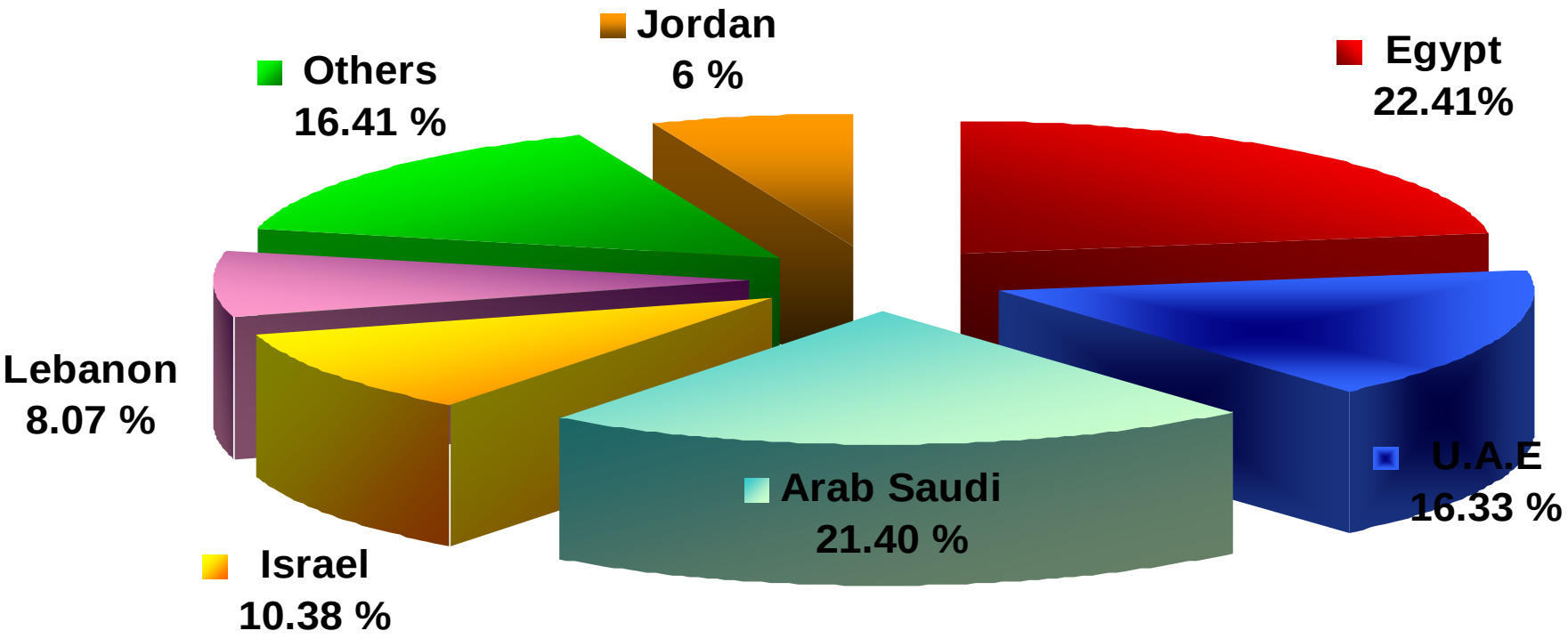
US$ million – From 2003 to Jan – Sep 2011



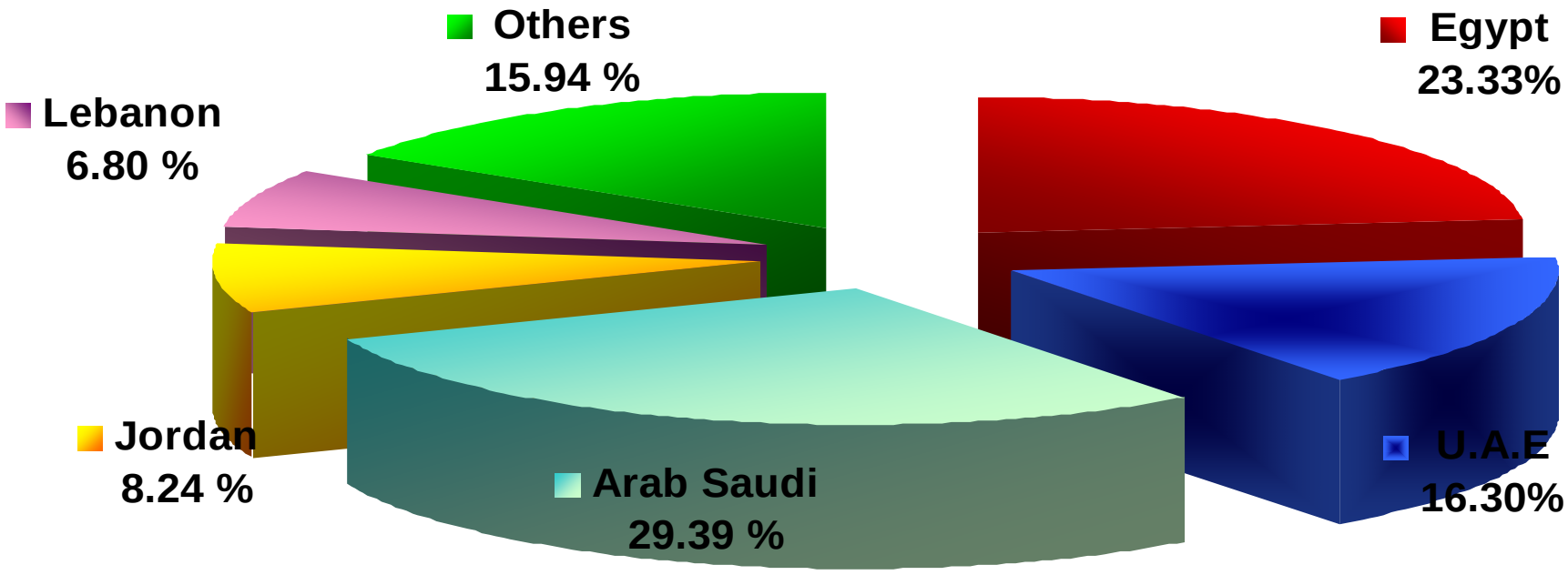
Seafood Export Volume to the Middle East, Tons – From 2003 to 2010



Seafood Markets Structure in the Middle East, from Jan - Sep 2011 (By Value)



Pangasius Markets Structure in the Middle East, from Jan - Sep 2011 (By Value)



Vietnam Aquaculture Strategy

- Environmental-friendly farming
- Natural pharmaceutics & pre-biotics use
- Technology & infrastructure modernization
- Vertical integration improvement : 4-Parties (Farmer-Processor-Scientist-State) Strategic Alliance Set-up; Community-based management
- Market diversification and value-added products
- Branding & country image building
- Higher and stricter requirements and sustainable aquaculture standard

STATUS OF SUSTAINABILITY OF VIETNAM *PANGASIUS* PRODUCTION - 4/2011

- **49** *Pangasius* processing companies have been/are being certified by GlobalG.A.P standard (**45**% total number of *Pangasius* factories)
- **103** *Pangasius* farms (owned by/cooperated with processsing companies) have been or are being certified by different sustainable standards
- **2,805 ha** of *Pangasius* farming areas have been/are being certified by different sustainable standards (about **40**% of total Pangasius farming area)
- **First 05** *Pangasius* farms owned by processing companies are implementing PAD standard and waiting for accreditation and certification by **ASC**
- Almost other *Pangasius* factories and farms to follow.

Sustainable Standard: Viet G.A.P

- Viet G.A.P is voluntarily implemented for responsible and sustainable farming
- Viet G.A.P is designed to be equivalent to Global G.A.P standards
- Viet G.A.P is set standards for:
  - Location, design & construction of farms
  - Good Farming Practices
  - Food safety & quality assurance
  - Traceability of product
  - Proper fish health & fish welfare management
  - Environmental monitoring & management
  - Social responsibility
- Cooperation Agreement with Global G.A.P

VASEP

- Vietnam Association of Seafood Exporters and Producers (**VASEP**) is a non-governmental, not-for-profit organization, established on **June 12th 1998**, based on the principles of volunteer, autonomy and equality.
- **VASEP** members: **280 companies**, include leading Vietnamese seafood processors, exporters and suppliers services to the seafood sector.
- Exports value of **VASEP** members represent 80% of the total seafood exports turnover of Vietnam.
- **VASEP** has signed Official Cooperation Agreement with the Ministry of Agriculture & Rural Development (24 August 2007)
- VASEP's international operation tools: **Vietfish International Magazine, Vietnam International Fisheries Exhibition**
- **VASEP** is **Chairman of the ASEAN Seafood Federation** (ASF)

LIST OF VIETNAM SEAFOOD EXPORTERS AT SIAL 2011

ACOMFISH
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ANMYFISHCO
panga@anmyfish.com.vn
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BIEN DONG SEAFOOD
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CL-FISH
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www.clfish.com

CL PANGA FISH
clpangafish@vnn.vn
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DOTASEAFOOD
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GODACO
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Thank You and Looking To Work Together!

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