

VIETNAM FISHERIES

Processing and Exporting Industry

Vietnam Association of Seafood Exporters and Producers
(VASEP)

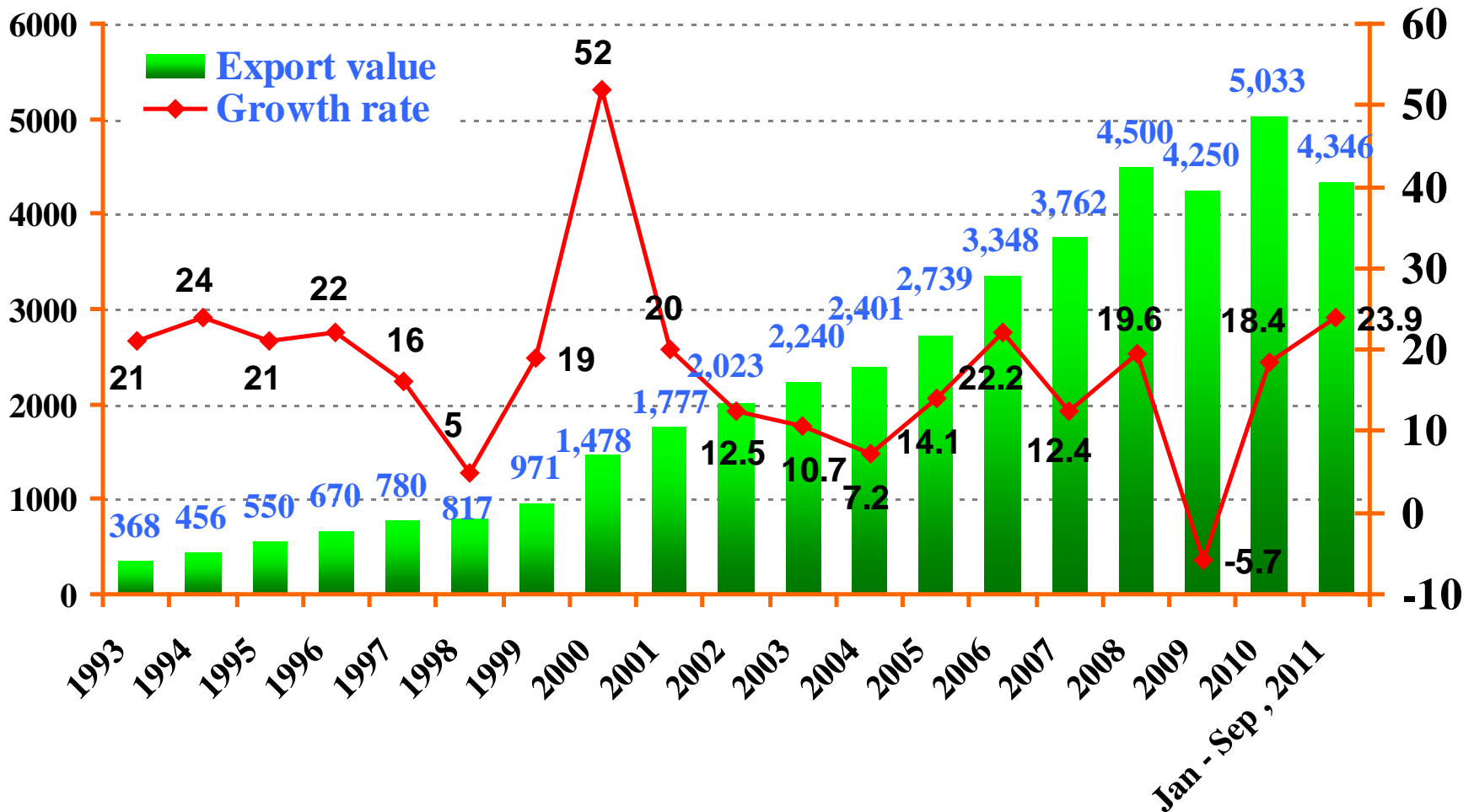
SIAL MIDDLE EAST – ABU DHABI 2011

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

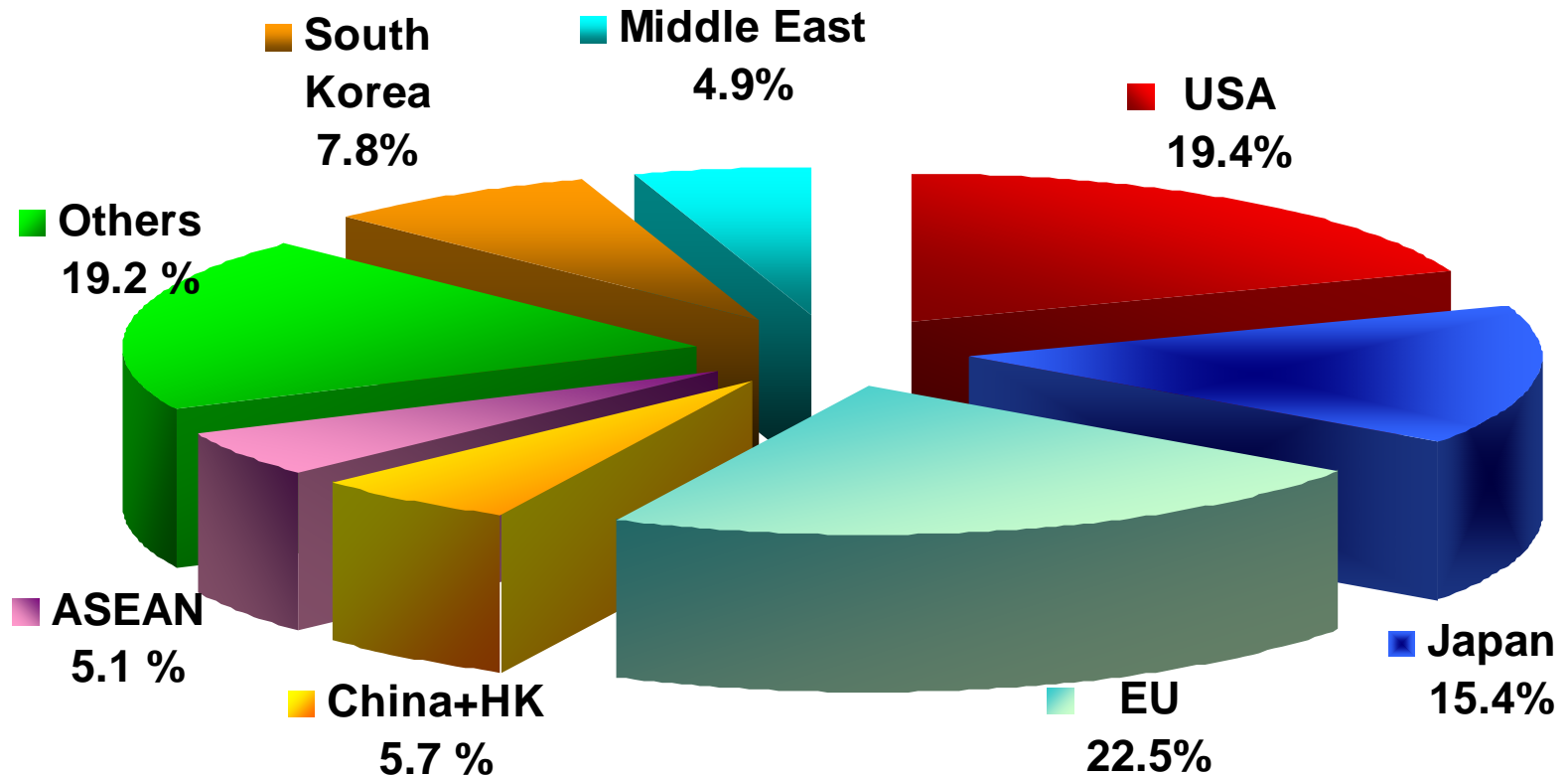
Million USD



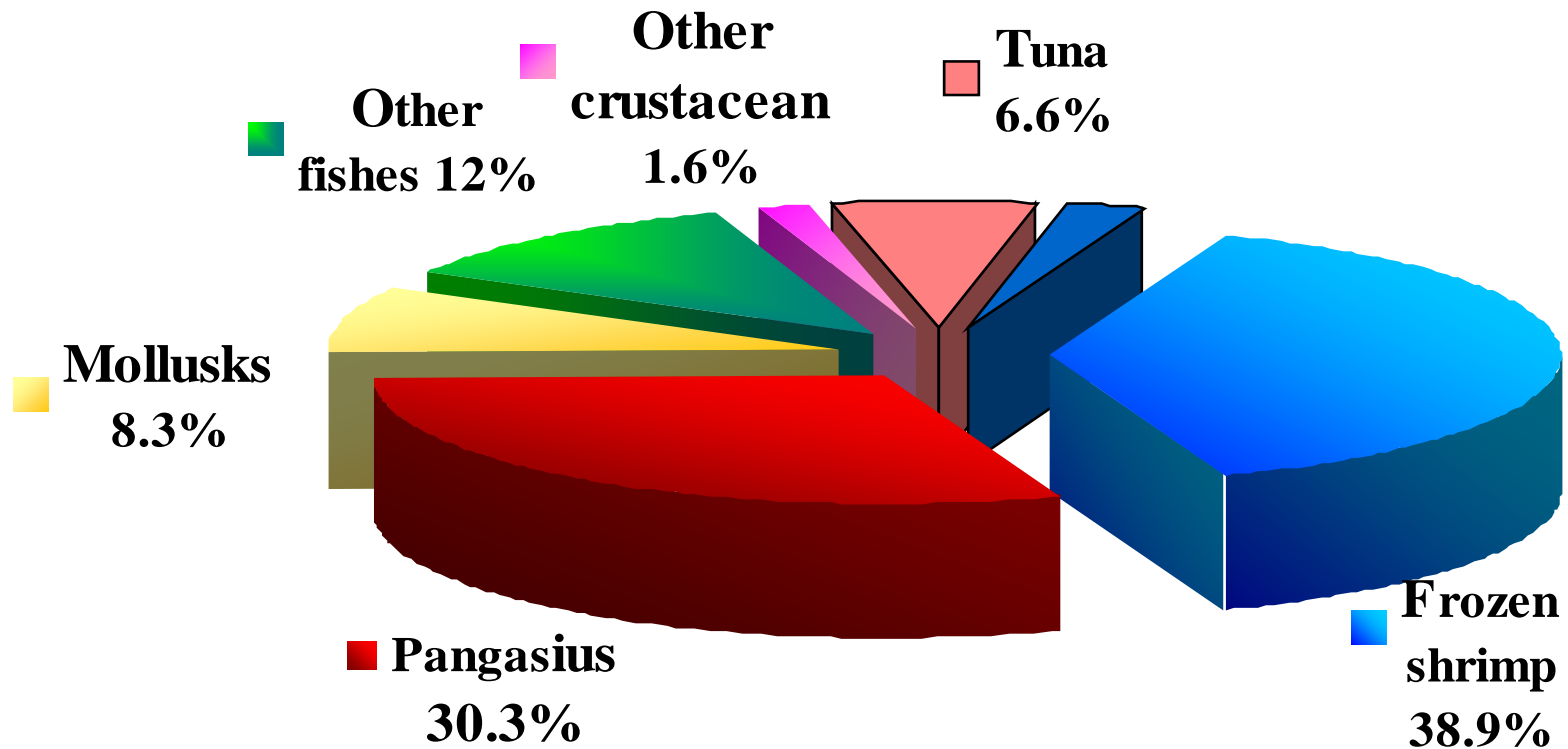
Export Markets Structure

Jan – Sep. 2011

(By Value)



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



PANGASIUUS

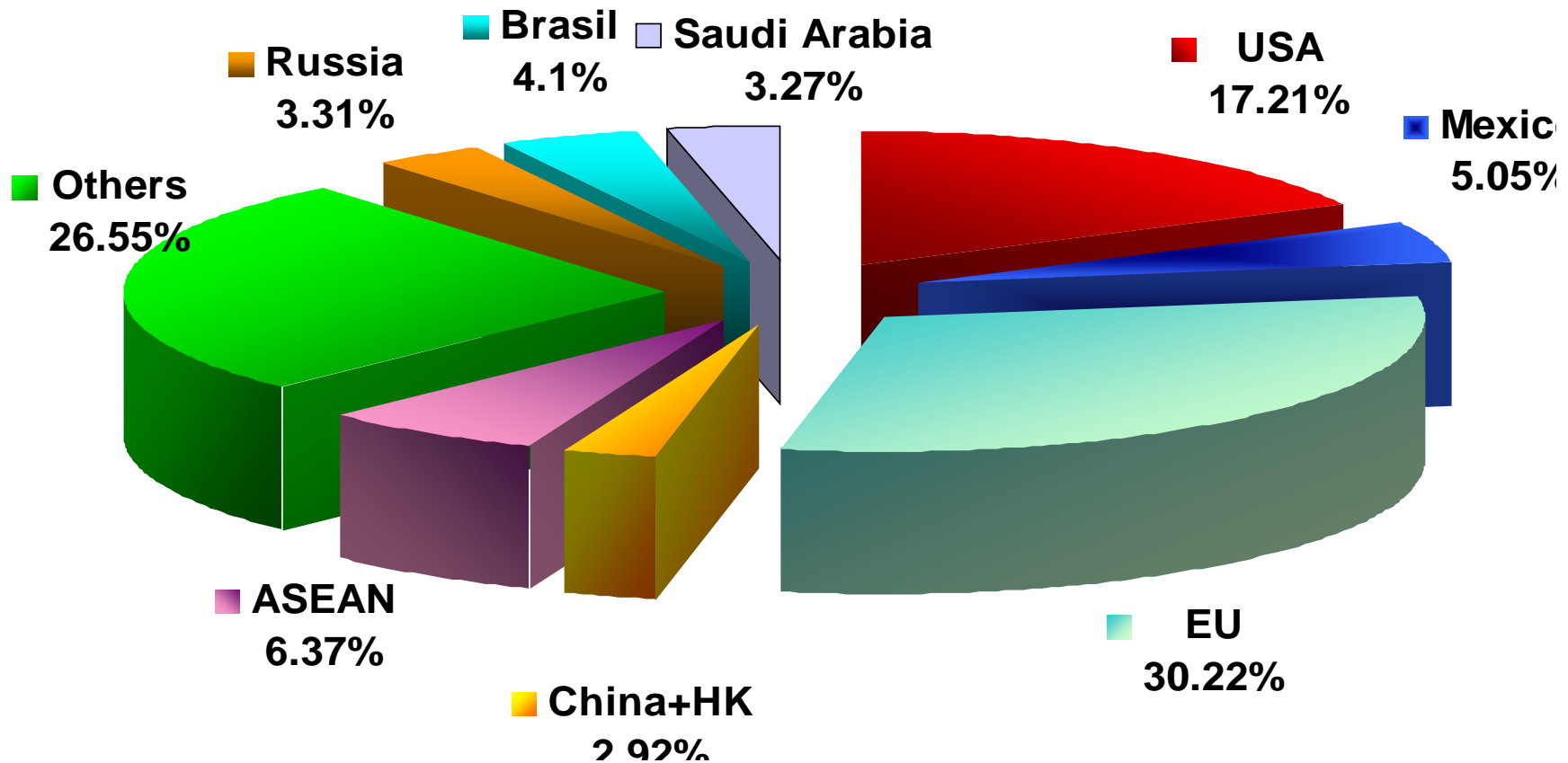


Vietnam Pangasius Success Story

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)

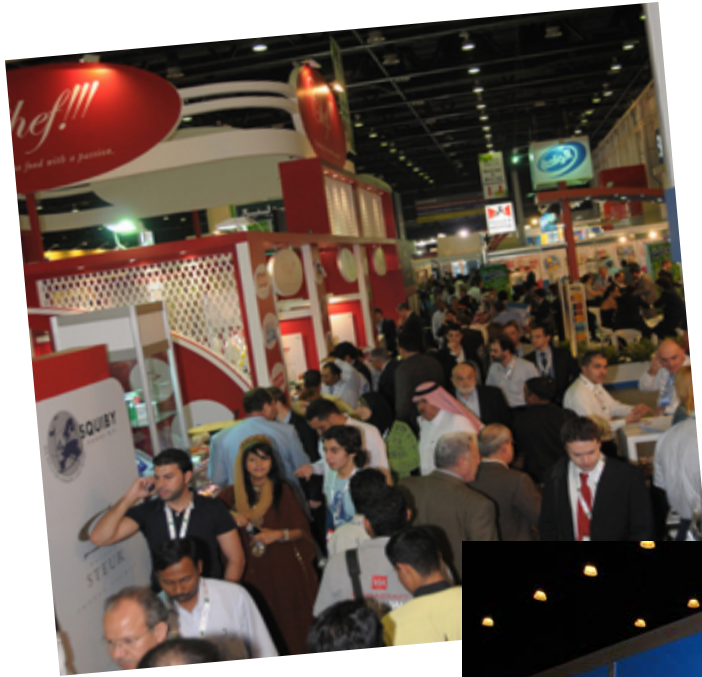


Shrimp Developement

In 10 years 2001-2010, Vietnam Shrimp:

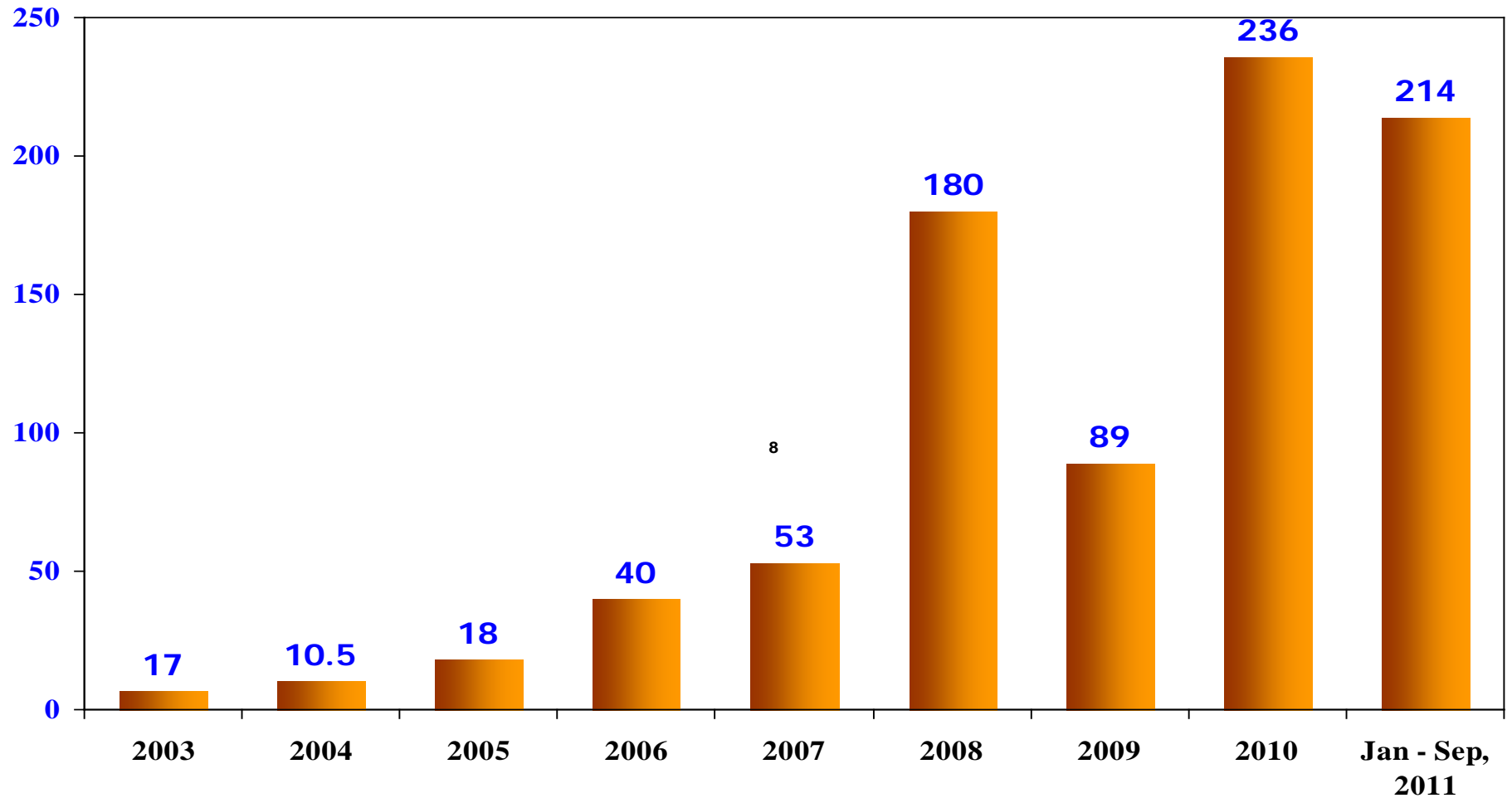
- Annual commercial production of raw shrimp increased **5 times**, from 93.500 MT to **450,000 MT**
- Export revenue increased **3 times**, from US\$ 662 mill. to **US\$ 2,106 mill.**
- Number of export markets increased from very few in Asia to nearly **100 countries** and territories, in all continents.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

Middle East Region

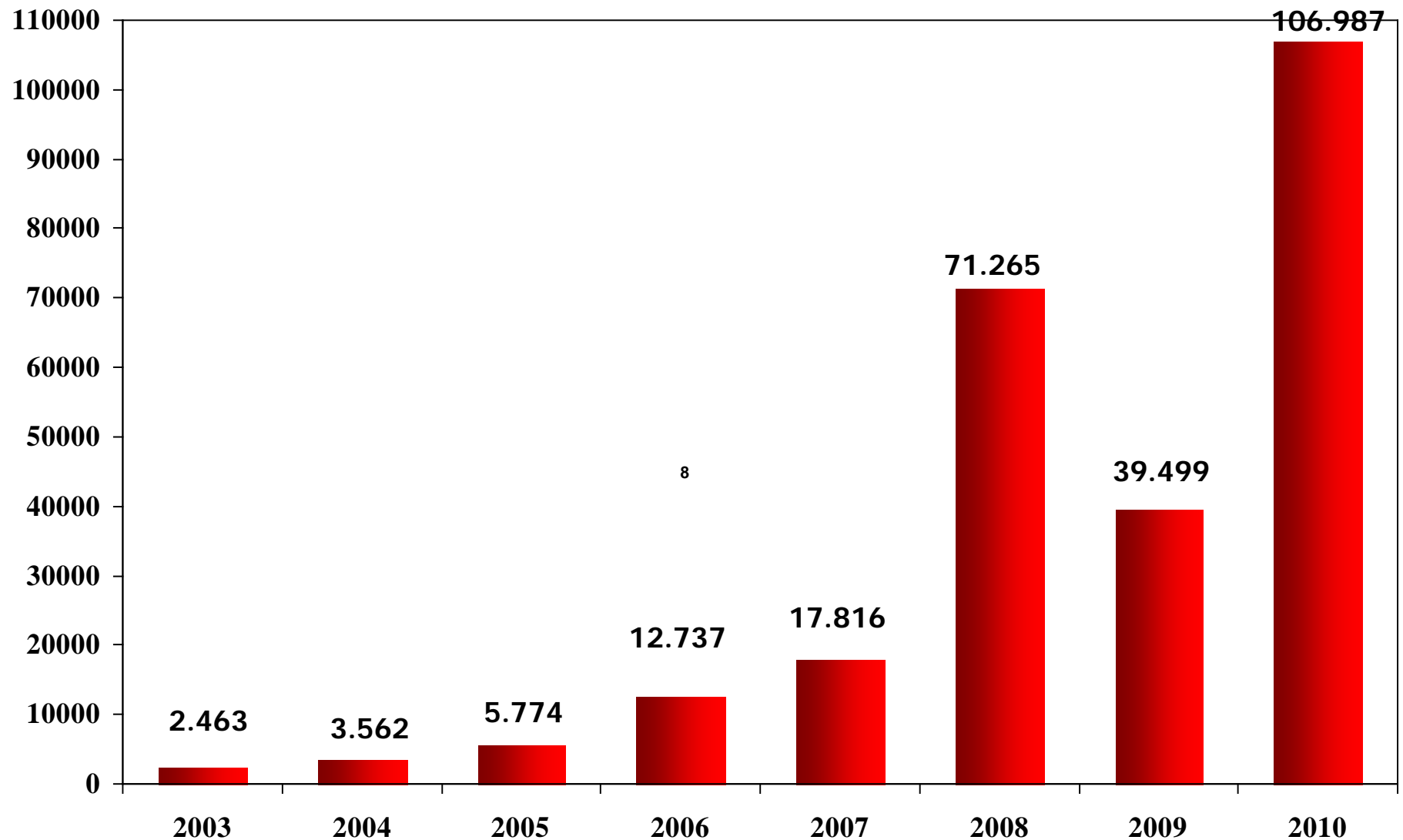


Seafood Export Value to the Middle East, US\$ million – From 2003 to Jan – Sep 2011

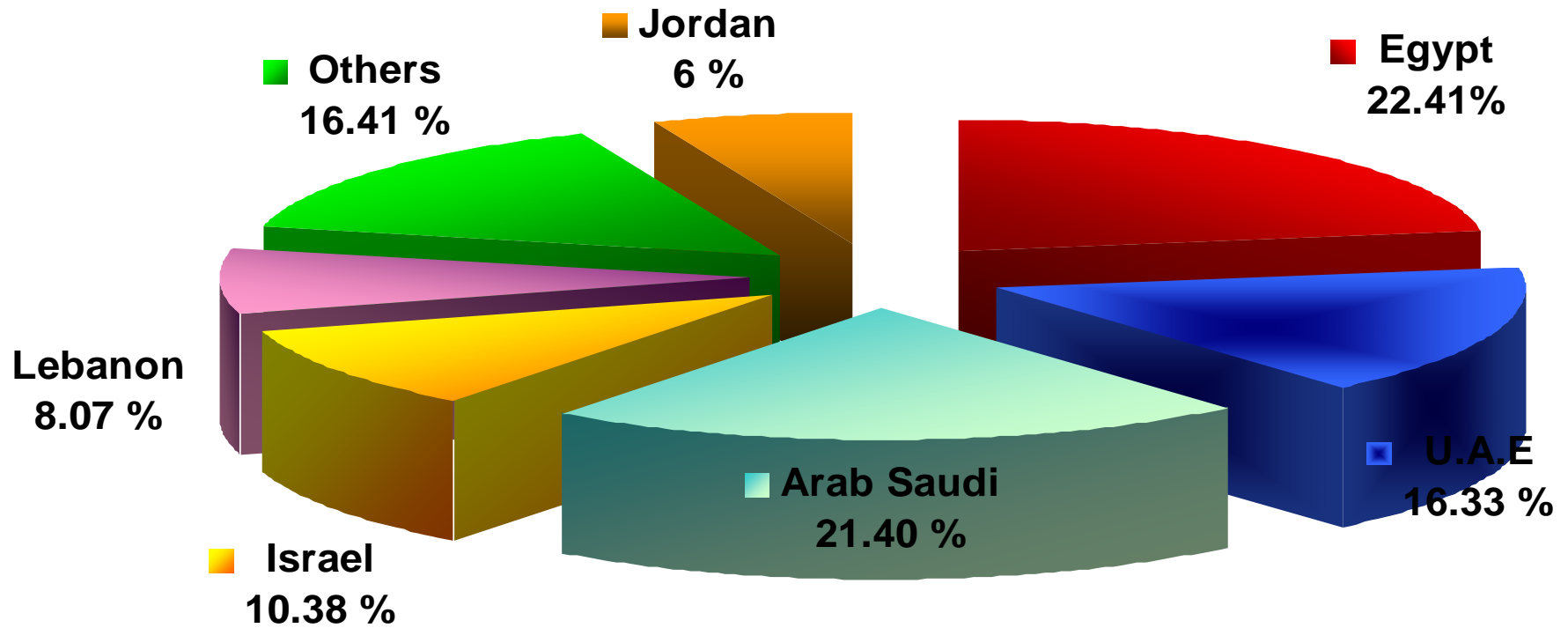
Million USD



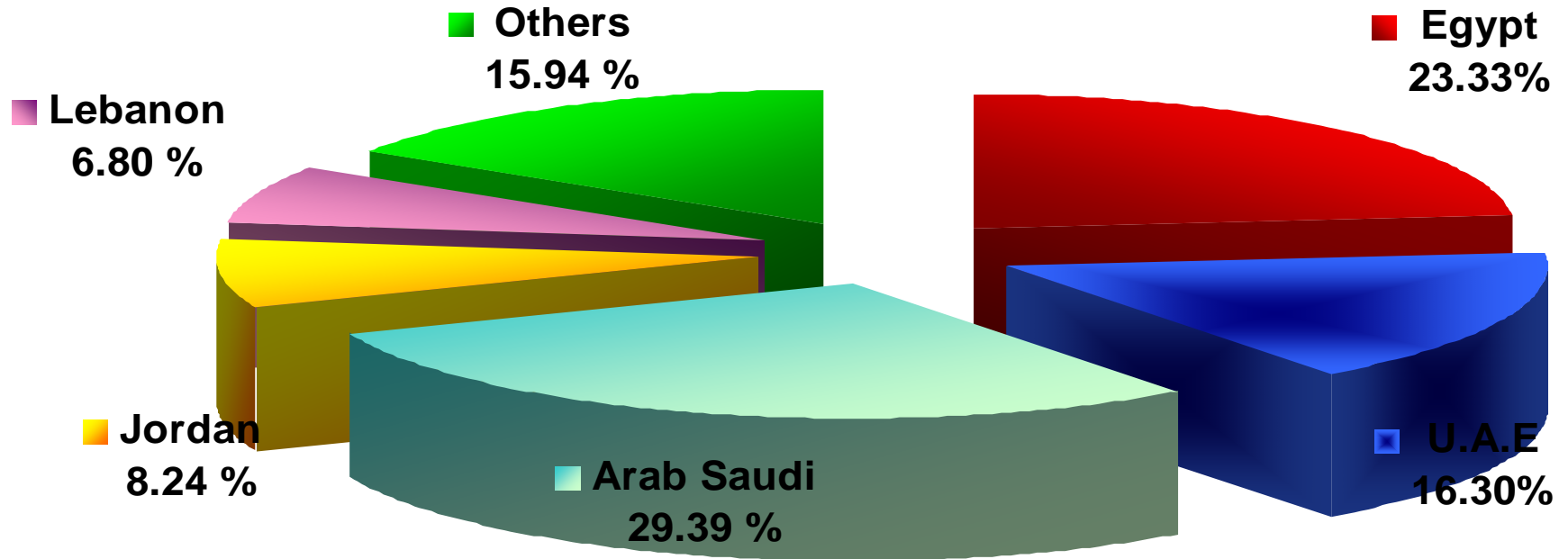
Seafood Export Volume to the Middle East, Tons – From 2003 to 2010



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 pharmaceuticals & 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 processing 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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*Thank You
and
Looking
To Work
Together!*

Vietnam Association of Seafood Exporters & Producers (VASEP)

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