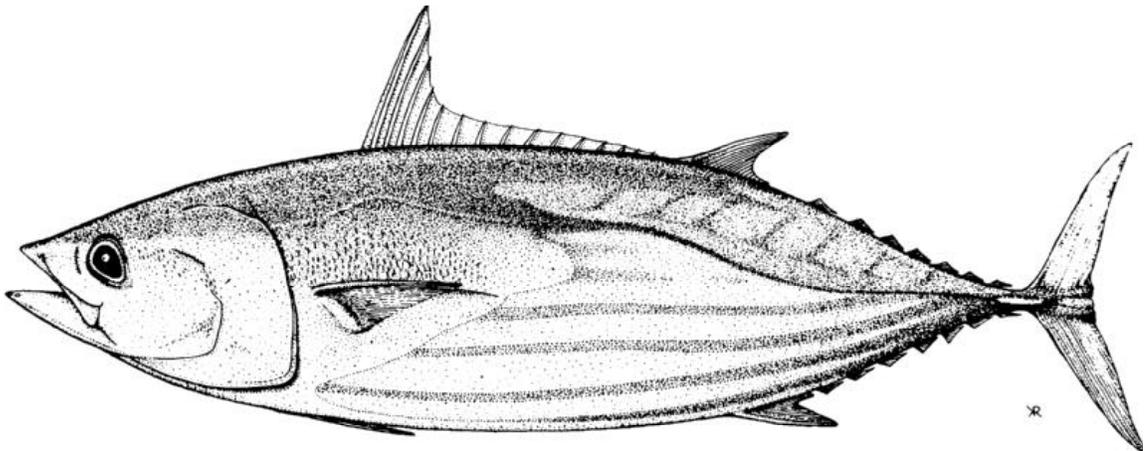


SCTB15 Working Paper

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Vietnam Fisheries Report



DUONG Long Tri

Fisheries Information Centre (FICen)
Ministry of Fisheries
Hanoi, Vietnam

Vietnam Fisheries Report
15th Standing Committee on Tuna and Billfish
Honolulu, Hawaii, 22 - 27/7/2002

Brief Introduction

Vietnam situated in the South-East Asia has a coastline of over 3,260 km with EEZ of about 1 million square km. The total area of the territorial waters is 226,000 square km. Also, Vietnam's sea area has many bays, lagoons, estuaries and over 400,000 ha of mangrove. Among 61 provinces of Vietnam, there are 29 coastal provinces. Those are huge potential for re-creating resources and developing various economic sectors, especially fisheries including marine fishing, aquaculture and seafood processing.

Since mid 1980s, on the way of transition to market economy with participation of multi-component commodity economy and the start of industrialization and modernization, Vietnam has got significant achievements. In the period of 1991 - 2000, an annual growth of GDP was 7.56% on average. Income per capita in 2000 was as two times as that in 1991.

Especially, the Fisheries sector has developed greatly and taken more and more important role in the national economy. Since early 1990s, Vietnam's Government defined the fisheries sector as a key economic one, which provides more jobs, increases income, makes contribution to alleviation poverty and reinforces efficiency for export of the country. In 2000, the sector created permanent jobs in the fields of fishing, aquaculture and seafood processing for more than 3.4 million people, of which 484,000 people working in fishing area, 668,000 people in aquaculture, 102,000 people in seafood processing and 2,146,000 people in other fisheries services. Income of about another 10 million people in part came from activities related to fisheries. Seafood ensures to provide approximately 40% of resident's animal protein intake. Fisheries export value occupied over 10% of total national export value, which ranked third among a group of products exported following crude oil and garments.

The main planning norms of Vietnam's fisheries in 1991 and 2000 :

| Criteria | 1991 | 2000 |
|--|-------------|-------------|
| - Total fisheries production, tons | 1,062,163 | 2,003,000 |
| Of which : | | |
| ♦ Marine fishing, tons | 714,253 | 1,280,590 |
| ♦ Aquaculture and inland fisheries | 347,910 | 723,110 |
| - Total number of engined fishing boats | 72,043 | 75,928 |
| Of which : | | |
| ♦ A number of off-shore fishing boats | - | 5,896 |
| - A number of labors living in fisheries, million people | 2.1 | 3.4 |

Source : ***The Ministry of Fisheries, Vietnam***

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Today, fisheries sector, in line with *Doi moi* (renewal) policies of the State, has been strongly developed towards the orientation of industrialization and modernization and has set up a sustainable fisheries and contributed to the national food security and export boosting. The sector's development is based on the investment in the unified economic programs namely Programs on Offshore Fishing extension and sustainable coastal fishing; Aquaculture development; and Seafood export development.

With regard to marine fishing, the concentration has been placed in the exploitation of off-shore high-valued species in order to raise the off-shore catch proportion in the total marine catch. Simultaneously, the re-allocation and limitation of fishing operations have been exercised to ensure the sustainable exploitation of coastal resources.

Aquaculture has been strongly transited towards the commodity production orientation and the culture development of fish species has been underlined to ensure national food security and export promotion aimed at putting the cultured product's productivity and value on a par with captured ones.

Regarding processing industry, due attention has been paid to the enhancement of production conditions, the application of quality control methods, the advanced hygiene products and the strengthening of processed fishery product's competitiveness.

Statistical data on Vietnam's Fisheries in 1997 - 2001

| Year | Total fisheries production (ton) | Marine fishing (ton) | Aquaculture & Inland fishing (ton) | Fisheries export value (million, US\$) | Total fishing boats (unit) | Total area for aquaculture (ha) | No of Labours (1,000 prs.) |
|------|----------------------------------|----------------------|------------------------------------|--|----------------------------|---------------------------------|----------------------------|
| 1997 | 1,570,000 | 1,062,000 | 481,000 | 776,000 | 71,500 | 600,000 | 3,200 |
| 1998 | 1,668,530 | 1,130,660 | 537,870 | 858,600 | 71,799 | 626,330 | 3,350 |
| 1999 | 1,827,310 | 1,212,800 | 614,510 | 971,120 | 73,397 | 630,000 | 3,380 |
| 2000 | 2,003,700 | 1,280,590 | 723,110 | 1,478,609 | 75,928 | 652,000 | 3,400 |
| 2001 | 2,266,900 | 1,347,800 | 879,100 | 1,777,485 | 78,978 | 887,500 | 3,400 |

Source : *Ministry of Fisheries, Vietnam*

Marine fishing

There are over 2,000 species of fish in Vietnamese waters, among which are around 130 species with economic value; 1,600 crustacean species; 2,500 species of mollusc and many other kinds of seaweed and seabirds. The total potential of fisheries resources is estimated at 4.2 million tones; the annual sustainable production is assessed at about 1.7 million tones.

Marine fishing accounts for a great portion in Vietnam's Fisheries sector, providing the key source for domestic consumption and export. Total marine catch reached over 1 million tones in 1997 (See below table) :

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Total catch for all species and all gears combined from 1997 - 2001

| Year | Total fisheries production (ton) | Marine fishing (ton) | | | |
|------|----------------------------------|----------------------|---------|---------|---------|
| | | Total | Fish | Shrimp | Other |
| 1997 | 1,570,000 | 1,062,000 | - | - | - |
| 1998 | 1,668,530 | 1,130,660 | - | - | - |
| 1999 | 1,827,310 | 1,212,800 | - | - | - |
| 2000 | 2,003,700 | 1,280,590 | 922,024 | 140,860 | 217,706 |
| 2001 | 2,266,900 | 1,347,800 | 956,938 | 141,500 | 249,362 |

Source : *The Ministry of Fisheries, Vietnam*

By the year 2001, Vietnam had about 78,978 engined fishing boats of all kinds with total engine capacity of around 3,722,577 hp, and ten thousands of artisan boats those mainly go on fishing in coastal area and inland water. Among the engined boats, there were more than 6,000 units with engine capacity of over 90CV, which are capable of performing offshore fishing. Marine fishing attracted around 530,000 labourers, 80% of whom go on fishing in the inshore areas. Total marine fishing production in the year 2001 reached 1,347,800 tones, over 60% of which were for domestic consumption, 18% for export and around 20% for other purposes. Fisheries fleet structure in 2001 is as below table :

| Total fishing boats | Total engine power (hp) | No of offshore fishing boats | Classified by horse power (hp) | | | | |
|---------------------|-------------------------|------------------------------|--------------------------------|---------|----------|-----------|----------|
| | | | < 20 CV | 21 - 45 | 46 - <90 | 90 - <150 | over 150 |
| 78,978 | 3,722,577 | 6,005 | 31,751 | 26,852 | 14,400 | 3,430 | 2,575 |

In term of fishing gears, gill-net accounts for the biggest portion - over 34% of the total number of gears. Other gears include: trawl net (26%), longline (13.4%), purse seine (4.3%) and others (squid catching, light using, etc.) which perform mostly in the inshore areas. Marine fishing has been now readjusted more sensibly.

For tuna fisheries, Vietnam's sea area is situated in the region where tuna resources is abundant. Therefore, in recent years, tuna fisheries in Vietnam has developed rapidly. Because of insufficient statistical system, data on the catch of tuna is not available. However, it was estimated for the year 2001 the catch was around 20,000 tons.

Target species were mainly big eye tuna and yellow-fin tuna. Resources of big eye tuna and yellow-fin tuna is mainly distributed in the central region. Unfortunately, up to now, researches into these resources have been not paid much attention to, those do not meet demands in information on tuna for fishermen.

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Tuna longlines have been main fishing method used in tuna fisheries. It develops strongly in the central provinces, e.g. Da Nang, Phu Yen, Khanh Hoa and Binh Dinh. The fishing season is from November to March. 70% of tuna catch was big eye tuna.

Although purse-seine has appeared long time ago in Vietnam, tuna purse-seine does not develop. Its target species is mainly small tuna such as frigate mackerel (*Auxis thazard*) and bullet tuna (*Auxis rochei*).

At present, due to the fact that the coastal fisheries resources have been exhausting because of over-fishing, fishing efficiency has been on the decrease. Therefore, since 1997, Vietnamese Government has started the Offshore Fishing Development Program and stabilizing the inshore fishing. By the year 2000, the production from offshore fishing accounted for up to 35% of the total marine fishing production.