

Problems of Fish Products Statistics in Vietnam

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Vietnam fisheries has grown continuously since 1980. Its exploitation volume increased by 4-7% each year. The total production of 1,066,300 tonnes in 1991 rose to 1,344,140 tonnes in 1995. The value of exports of some items has also increased more than 12 times between 1988 and 1993 more rapidly between 1991 and 1995. In 1991 the export value was US\$225 million, and rose to US\$550 million in 1995. The details are described in Tables 1, 2 and 3.

Vietnamese factories with export capabilities have the following facilities :

- Frozen products, 780 tonnes per day
- Chill-storage capacity, more than 20,000 tonnes
- More than 150 storage vans with a total load of 800 tonnes
- More than 20 chill-storage vessels loading, more than 6,000 tonnes

Data on the export of fish products is as follows :

1981 --	US\$ 11.2 million.
1991 --	US\$252.0 million.
1995 --	US\$550.0 million.

The absolute value for frozen shrimp is gradually increasing, but its average price tends to decrease; for example :

Year	Average Price
1982	US\$ 6.5 / kg
1991	US\$ 4.8 / kg
1993	US\$ 4.6 / kg
1994	US\$ 4.9 / kg

The products are mainly exported to Japan, Hong Kong and Singapore, and a small amount is exported to the EU and North America. For example, the export to the EU in 1994 was US\$30 million.

Domestic fishery products are mainly fish sauce and fish meal for animal feed. In 1994, 150 million liters of fish sauce and 15,000 tonnes fish meal were produced.

An Industrial Consultant Committee for Development (ICD) found that only 30% of fishes caught are used in the processing industry in Vietnam; the remainder is consumed fresh. It is not yet possible to increase the volume processed because

of a shortage of advanced and appropriate preservation equipment. The post-harvest losses of Vietnam fisheries are estimated by the ICD at up to 40% of the total volume.

Vietnamese fish products are produced in the form of semi-manufactured or in crude forms such as frozen, salted, dried and artisanal fermented products. Canned and value-added products occupy only a small percentage of processed products.

To enhance the value of fish caught, the Vietnamese fishery processing industry must focus on :

- a) Minimizing post-harvest losses. This will be carried out by promoting preservation technology and mechanization to protect raw material from damage and spoilage and to quickly transport the raw materials in an optimal condition to the processing factories.
- b) Upgrading export products quality to meet the standards of international markets.
- c) Using low cost fishes and by-products from fish processing plants for making value-added products.
- d) Diversifying fish products to meet consumers' demand in the domestic and foreign markets.

The Vietnam statistics for processed fish products needs improvement. The main reason is that fishery statistics have not been considered as important as it should be. Firstly, it is because fish processing in Vietnam is still a small scale industry and the products are of low value. Secondly, it is because of a lack of funds for running it.

Vietnam has not yet established a complete fishery statistics system. With the expected assistance from SEAFDEC for this sector in the coming year, we can hope to improve the situation and have a more effective statistics system.

- Vietnam now, urgently needs assistance in :
- Fishery statistics methodology (data collection method),
 - Organizing fishery statistics and budget for running fishery statistics.

The aim of Vietnam's fisheries for the year 2000 is to increase production to 1,600,000 tonnes with an export value of US\$1 billion, from a sustainable fishery without affecting biodiversity.

Table 1. Total production of fisheries in Vietnam (tonnes) from 1988-1993.

Year Name of Product	1988	1989	1990	1991	1992	1993
Total Production	900,030	934,582	978,880	1,066,000	1,080,279	1,172,529
Processed Products:						
Fish meal	-	-	1,856	8,000	25,470	14,200
Fish sauce/10 ³ L	-	-	105,076	136,200	143,552	150,000

Table 2. Production of capture fisheries of Vietnam during 1985 - 1995.

Year	Production (tonnes)	Number of boats	Power of boats (HP)	Fishermen	Output tonnes/fisherman/year
1985	626,848	29,323	494,507	220,770	2.84
1986	597,718	31,680	537,503	269,279	2.20
1987	640,569	35,406	597,022	291,441	2.20
1988	662,816	35,744	609,317	299,300	2.21
1989	661,365	37,035	660,021	269,467	2.45
1990	672,130	41,866	787,685	753,287	2.65
1991	714,253	43,940	824,438	275,035	2.60
1992	746,570	54,612	986,420	338,927	2.20
1993	798,057	61,805	1,291,550	363,486	2.19
1994	889,998	NA	1,443,950	389,533	2.28
1995	928,860	NA	1,500,000	420,000	2.21

Table 3. Fisheries products exported (tonnes), 1988 - 1993.

Year Products	1988	1989	1990	1991	1992	1993
Frozen shrimp	25,192	23,624	94,000	40,058	38,795	55,680
Frozen cuttlefish	2,412	2,918	4,800	4,350	4,877	7,050
Frozen fishes	2,817	12,765	4,000	7,179	20,122	23,149
Dried product (mainly squid)/	4,213	3,171	4,279	5,814	9,500	20,135

Recommendations for Workshop

General :

1. MFRD should continue with the inventory and the publication. The compilation should be a regional activity with MFRD as the lead agency involving the national institutes in ASEAN.
2. MFRD should organize a workshop in order to discuss and define the activities to be undertaken during the compilation and to provide an opportunity for the exchange of updated information on fish products.
3. The compilation of information on the technical aspects of the fish products should be intensified. Such information should include the complete description of the products, the processing methods, raw materials used, source of raw materials, the end products, and usage and distribution of the products, whether these are used for local consumption or for export. In this respect, member countries of SEAFDEC were asked to provide more inputs for the compilation activity in terms of manpower and financial resources so as to reduce the number of "N.A." responses in the survey questionnaire.
4. MFRD should make use of the existing ASEAN information network to facilitate a regular exchange of information and comprehensive updating of the compilation.
5. The national standards of fish products that are already available may be quoted as a reference in the Fourth Edition of the Inventory.

National :

1. Country coordinators are encouraged to continuously collect and update as much information as possible and make the compilation an ongoing activity on a yearly basis so as to also reflect the seasonality of some products.
2. Country coordinators should work with their field officers to collect the information and data in addition to those gathered by their national customs/trade offices. Each country should negotiate with its customs/trade office to initiate the possible revision of the customs/trade codes of fish products so as to include information on new categories of fish products in the trade statistics of each country.
3. Information on small-scale and cottage industries should be included in the compilation.
4. Newly designated country coordinators should work closely with the former coordinators in order to have a smooth handover of responsibilities and for a better understanding of the activity.