

STATISTICAL DATA ON VIETNAMESE FISHERIES

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1. INTRODUCTION

Vietnam has a long coastline of 3,260 km with 112 river mouths and canals. Its Exclusive Economic Zones covers 1,000,000 km², scattered in the 4,000 small and large islands, from straits, bays and lagoons where marine resources are in great abundance.

From the available data the annual total allowable fish catch is 1.2 to 1.4 million mt. In addition to finfishes, about 50,000-60,000 mt of high-value shrimps and 30,000-40,000 mt of cuttlefish can be harvested annually from the Vietnamese waters. There are also mollusks, e.g., arcshell and scallops as well as seaweeds.

Aquaculture potential is great with about 1.4 million ha of inland water surface areas including over 30,000 ha of tidal areas; 40,000 ha of reservoirs, rivers and streams; 60,000 ha of rice field and low laying areas. Additionally, there are over 80,000 ha of strait and bays, natural lagoons which would be tapped for aquaculture development.

Vietnam fisheries sector has gained remarkable records of increased production and trade which led to the strengthening the power of fishery production, increasing national accumulation and contribution to national economy. The annual increase of the fishery sector in the total national GDP during 1992-1995 is about 3%. The contribution of fisheries to Vietnam economy in 1995-1996 (100 VND = US\$ 0.009, March 1997), is shown below:

	<u>1995</u>	<u>1996</u>
GAP (1,000 Million VND)	222.800	258.609
GDP per capital (Million VND)	3,028.000	3,495.000
Contribution (Million VND)	67,600.000	69,680.000

The fishery sector has provided jobs for a number of people, the annual increase recorded in 1995 was at 162.9% compared with that of 1990. The labor force in the fishery sector in 1995-1996, is shown below:

	<u>1995</u>	<u>1996</u>
Total number of laborers (1000 people)	1,860.000	3,030.000
Of which the number of fishermen were	270.587	420.000

The number of fishing boats in 1990 and 1995, are shown below:

	<u>1990</u>	<u>1995</u>
Total (Unit)	72,328.000	95,700.000
In which:		
+ Motorized boat	41,247.000	68,000.000
Total horse power	724,300.000	1,500,000.000
+ Non-motorized boat	31,081.000	27,700.000

Since the in-shore marine resource has been over exploited, Vietnam has limited the increase of its small fishing boats and catching activities in the shallow area; and strengthened the fishing effort by investing in bigger engine fishing boats for offshore fishing. Due to the said limitation, the average increase of boat power was from 18 HP in early 1991 to only 22 HP in 1995. The number of boats with over 60 HP has however increased annually from 400 to 800 boats.

Vietnam fishery production has increased recently. The production output of fisheries reached 140.3% in 1996 compared to 1990 (Table 1). The export value in 1996 increased by 326.83% compared with the 1990 data (Table 1).

Sea products is one of the important food for the Vietnamese. The fish consumption per capita in 1996 was estimated at 11.6 Kg/capita (equivalent to 30% animal protein per meal). The total fish production for domestic consumption was over 800,000 mt. Fish for meal production and other consumption was over 300,000 mt.

2. FISHERY POLICIES TOWARDS YEAR 2010

The key objectives for the year 2010, include increase in total fish production, as shown below:

	<u>2000</u>	<u>2010</u>
Total fish production	1,600,000 mt	2,200,000 mt
In which:		
- Marine capture (mt)	1,000,000	1,200,000
- Inland & brackish Aquaculture (mt)	600,000	1,000,000
- Export value (USD Million)	1.0	2.2
- Number of laborers	4,000,000	6,000,000

In marine capture fisheries, the goal is to maintain the existing number of fishing fleet so that the production output will be stable at 700,000 mt per year in shallow water. On the other hand, the country's development program also includes upgrading of off-shore fishing fleets in terms of horse power from 90 HP up and installation of modern equipment and efficient fishing gear for catching high value species such as: cuttlefish, tuna, etc.

Fishery legislation should be strengthened to include regulations on species catching, prohibited areas, prohibited time of catching, and conservation of broodstock, construction of natural conservation area, protected areas for resource reproduction, and catching quota for each area and each species.

Aquaculture development is one of the key strategies of the fishery sector of Vietnam. The program includes efforts to speed up the survey, investigation, planning, programming of aquaculture projects at the national and provincial levels. Such development plan shall be carried out in combination with rational and effective use of the water surface areas, providing attractive labor opportunities to the people, population relocation, and eco-environment protection.

Taking into consideration a household family as an autonomous economic unit and as a key role for aquaculture development, state owned enterprises are taking main role on supporting services for aquaculture. The program also aims to link the scientific research and technical application with production and marketing. For the brackishwater and marine ventures, improved extensive culture, semi-intensive and intensive culture with sustainable technology will be adopted. More investments will be put in from the year 2000 and beyond.

The major species for aquaculture are black tiger shrimp, white shrimp in combination of local shrimp fry. A program to develop other culture species such as crab, seaweeds, ark shell, clam, scallop, snails, green turtle, grouper, red snapper, lobster, pearl, is also being planned.

The government recognized the need to upgrade its existing processing facilities, line processing facilities with material supply area. The processing and product conservation program is aimed at improving the quality of high economic value products using attractive packaging. The program will fully take advantage of material supply sources and minimize post-harvest losses; limit the material export and shift to products processed for the supermarket; and expand processed products, including instant product, surimi, canned products, fish ball, fish meal, meeting the requirements for quantity and quality of products for domestic market.

The government policy also aims to complete and put into operation the development of infrastructure facilities such as: jetty system, water and fuel supply, cold storage, etc. as well as the rehabilitation and enhancement of existing fishing ports and landing sites.

Other goals include:

- a) Dredging the estuaries for fishing boats covering areas from typhoons;
- b) Survey and re-assessment of ship repair and building capabilities for the fishery sector;
- c) Complete investment in state owned mechanical boat facilities in Haiphong, Da Nang, Ho Chi Minh City and some composite boat making plants;
- d) Deep investment in 30 boat repair and building units in most provinces;
- e) More investment and upgrading the electrical and refrigeration units; and
- f) Upgrading the packaging and fishing net making plants.

The government has drawn up proposals for the implementation of the various policies it had developed. These include:

a) **Institutional strengthening**

This focuses on the creation of favorable conditions for multi-economic modes to develop market oriented products, under the state management; the completion of the fishery legislation in Vietnam; the establishment of the complete policies for fishery development; the establishment of a concrete policy on fishery resources protection such as regulation on limited catching area or catching seasons, prohibited species for catching areas or catching seasons, prohibited species for catching, and treatment of violation cases.

In addition, the government also intends to disseminate the information for the people's awareness; the re-organization of the fishery structure and personnel and strengthening the capabilities of staff, workers, fishermen, through training in order to keep up with fishery development; the strengthening of information on the scientific, technical and economic aspects of fishery sector; revision of administration of issuing licenses such as Trade license, Fishing boat license, enacting legal paper, servant assessment, preparing economic and technical norms, and procedure for project evaluation. This is envisioned to create a suitable administration with efficient operations without corruption.

b) **Strengthening the science and technology to speed up production**

This effort aims to continue to conduct key investigation, to speed up the research and application of technology, especially biotechnology, advanced techniques in catching, aquaculture processing, mechanical services, etc. Attention should be given to the methods of reasonable production, conservation of raw material as well as fuel and materials consumption.

c) **Strengthening fisheries planning**

This is aimed at continuing the key investigation and planning of the fishery sector, making plans for each region, province and project. This also includes determining the guidelines for the development of the sector, and giving out concrete steps to implement these plans. At the same time, monitoring the implementation of plans and making timely suggestions in order to re-adjust the plans accordingly.

3. THE EXISTING FISHERY STATISTICAL SYSTEM

The Ministry of Fisheries of Vietnam is collecting the statistical data from provinces. The units under the Ministry collate the periodical report like monthly, quarterly and annual reports. However, fisheries has its own characteristics in terms of its multi-economic modes. Many people are engaged in fisheries and in many trading companies operating in the sea, rivers, lakes, lagoons.

Widely, the nation is characterized by the existence of few professionals and techniques, and outmoded equipment. In the units of the Ministry and provincial departments, there is not a section specializing in statistical works. Hence, statistics collection is normally being done concurrently by the functional department. There is also no training course on the collection of fishery statistics. Therefore, statistical data collected from provinces are insufficient and lacks the proper timing. Also, the treatment of the statistical data may be slow and could be inaccurate.

Since statistical data collection are insufficient and incomprehensive, the data does not reflect the status of the production capability of the entire economic modes engaged in fishery activities. In data processing, statistical data are taken from collected documents of the provinces, agencies and other units under the General Department of Statistics, Ministry of Trade, General Department of Custom, INFOFISH Review. From these sources, staff of the Ministry doing the statistical work make comprehensive statistical reports that be useful in the management of the sector's production and information related to the business ventures of the Government.

In order to improve the country's statistical fishery system and keep up with the growing demand of users in line with industrialization and modernization, the government focuses its attention on the organization structure to be completely reorganized from the ministerial, provincial, and district levels as well as from companies, enterprises and collective units. This is aimed at establishing the system of collection and processing of statistical data on fisheries. A Central-based office will be set up in the Ministry of Fisheries, and substations to be formed in provinces, cities and production bases under the Ministry, provincial departments and collective units, using facilities from the communication network of the fishery sector. In addition, a format of norms, periodical, monthly, quarterly, and annual reports will be formulated for the general assessment of the production capabilities of the sector; an investigation and collection of statistical data and in general, evaluation of the production effort of the multi-economic modes engaged in fisheries will be conducted; and training of staff on statistical work from central to provincial levels with high degree of professionalism, skills and information, will be conducted.

However, the Government also recognized that the country's fishery statistical system, the collection of fishery statistics, and the economic constraints, have not been improved recently, at least starting from 1994. Strengthening the fishery statistical capabilities is one of the most important tasks included in improving the resource management capability of the country during the period 1996-2000.

Table 1. Vietnam: Fishery production, consumption and export (1990-1996)

YEAR	1990	1991	1992	1993	1994	1995	1996
Total Production	978880	1062163	1080279	1170529	1287166	1141990	1373550
Catching (Ton)	672130	714253	721681	796057	889998	954640	962500
Domestic							
Consumption and fish-source (Tons)	306750	347910	358598	374472	397168	459950	411000
Export							
Value (USD1000)	205000	262334	305163	368435	458200	550600	670000
Export Volume (Tons)	49332	64700	79609	94825	110800	127700	150500