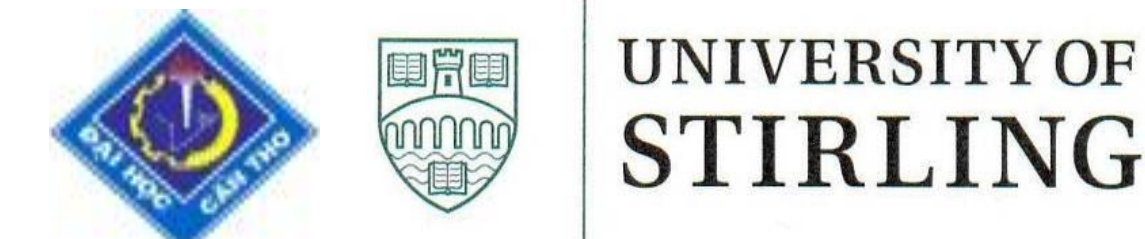




## Sustaining the Striped Catfish Value Chain in Vietnam

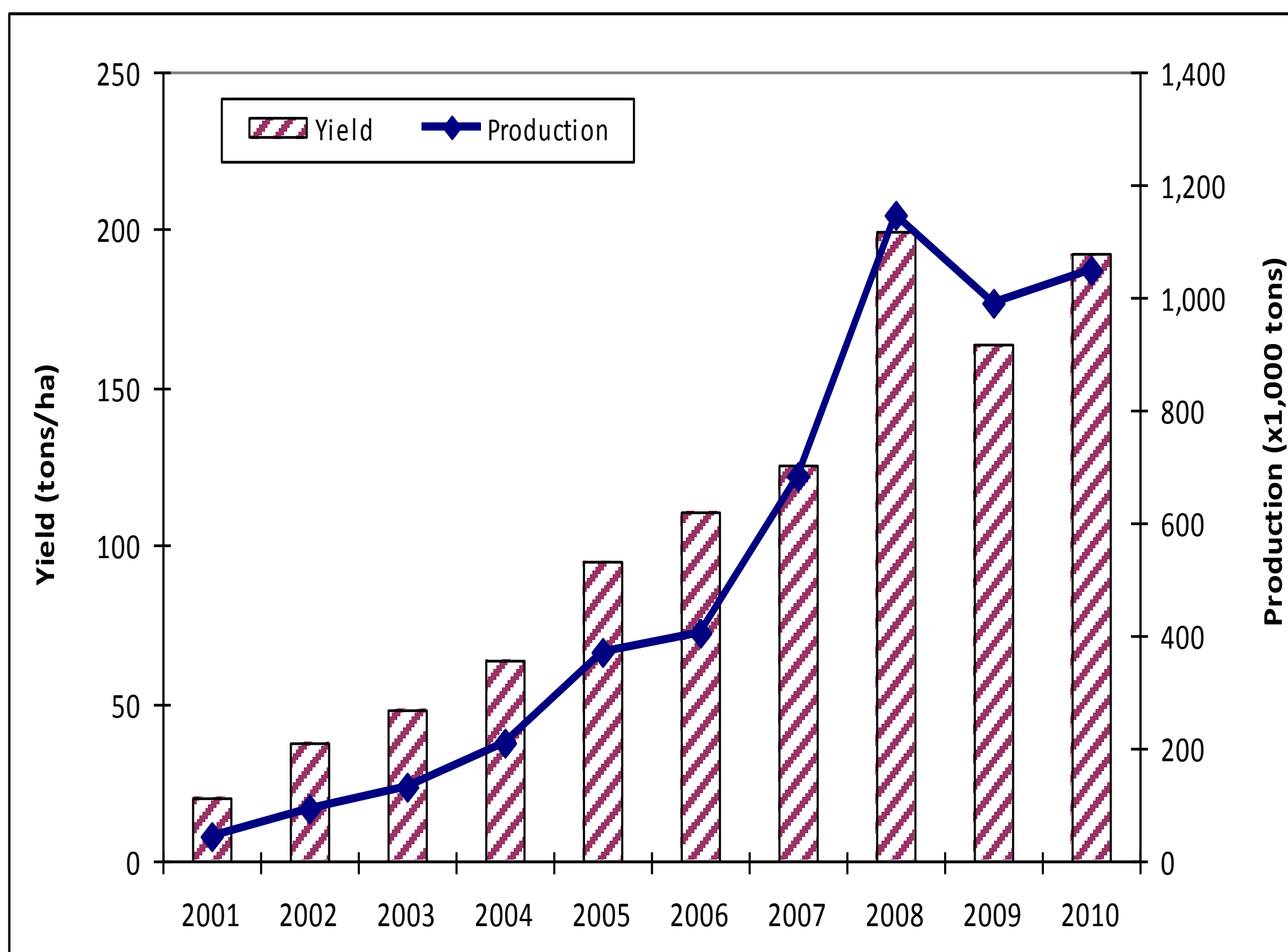


### What is SEAT?

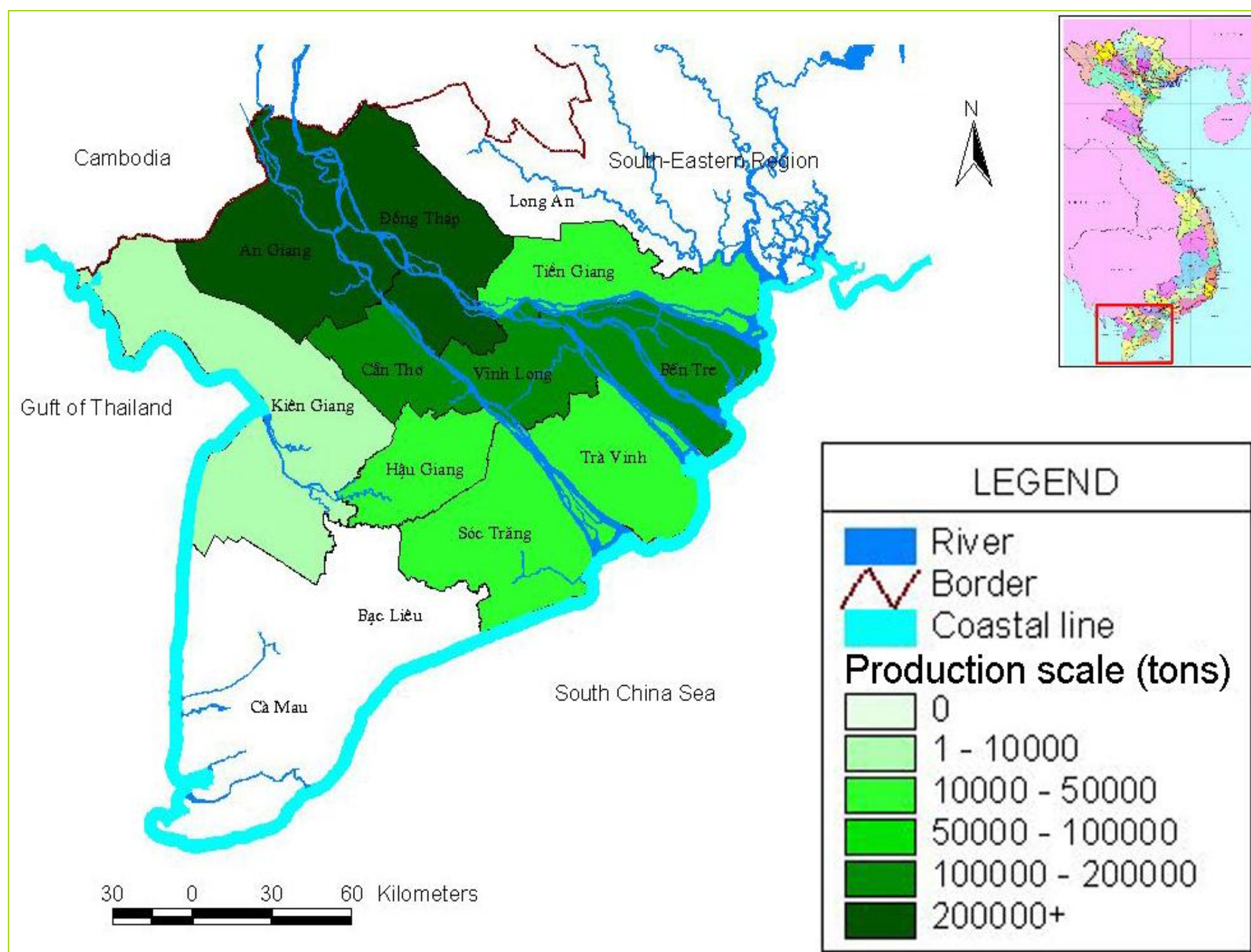
- The Sustaining Ethical Aquaculture Trade (SEAT) project works in four major Asian seafood producing countries such as in the world, namely China, Bangladesh, Thailand, and Vietnam.
- In Vietnam, SEAT is coordinated by Can Tho University and working with various stakeholders along the catfish value chain to understand and address sustainability issues related to catfish production and trade (local and international).
- This poster is based on 2 years of field work with actors at all levels of the value chain.

### Catfish in Vietnam

- Catfish farming (*Pangasianodon hypophthalmus*) in the Mekong Delta (MKD) plays a very important role in the aquaculture sector of Vietnam contributing nearly 40% of total production in 2010.
- Catfish productivity (T/ha) has grown rapidly in recent years based on use of deep ponds with intensive feeding and water exchange.



- Four provinces dominate catfish production: An Giang, Dong Thap, Can Tho and Vinh Long, accounting for 76% of the total in 2010 (see Map).



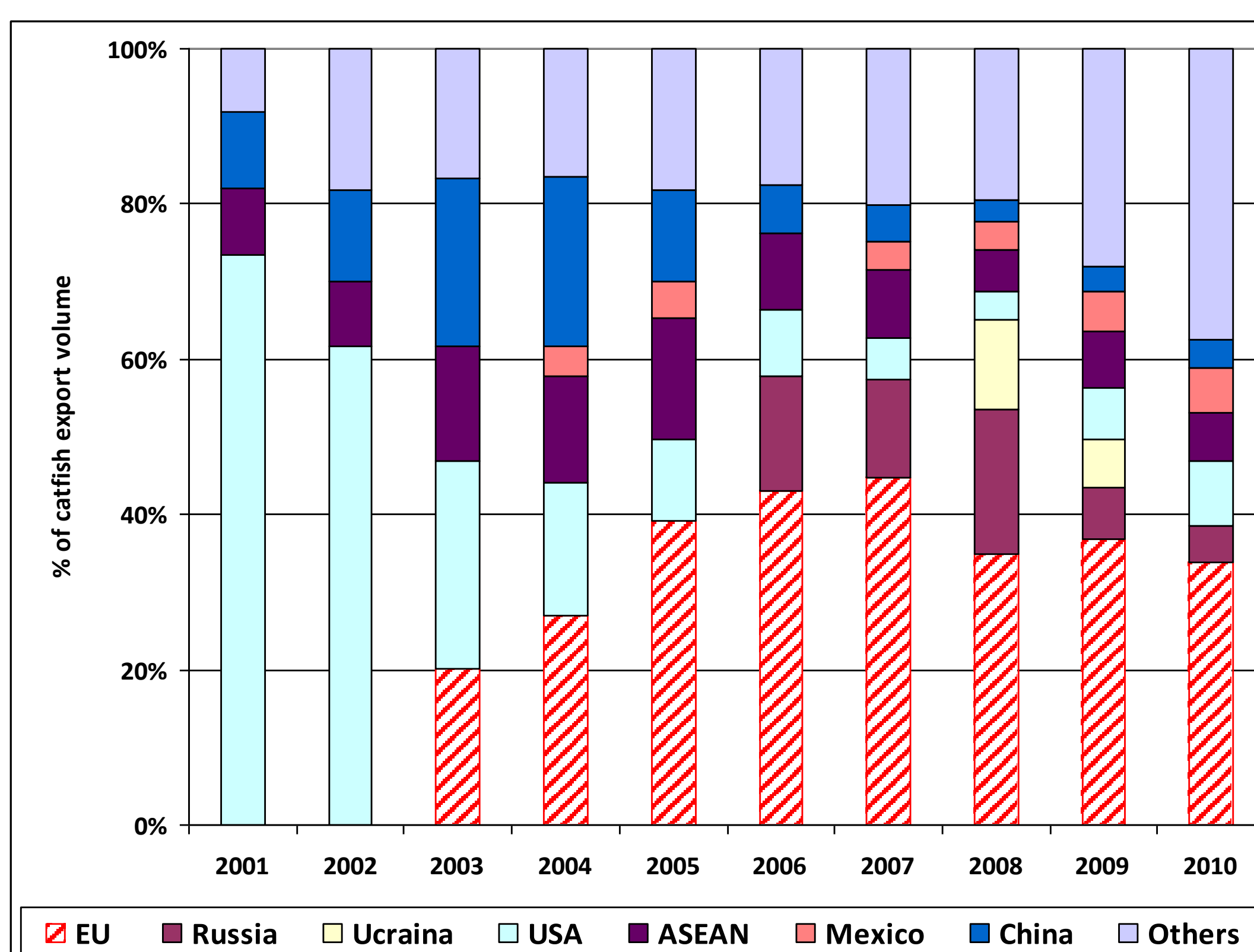
### Farming systems

- Catfish farming system in the MKD (in 2010):
  - Pond culture: Stocking density ~20-40 fingerling/m<sup>2</sup> → harvest ~20-40 kg/m<sup>2</sup>. This system accounted for 98% of total production in the Mekong Delta;
  - Pen and cage culture now account for around 2% of total production.



### Marketing & export

- Catfish has contributed an increasing proportion of Vietnam's exported fishery products over the last decade.
- Catfish products exported totaled 621,955 tons corresponding to almost US\$ 1.4 billion in 2010. It accounted for 49% of volume and 28% of seafood export value.
- Since 2001 and particularly since 2004, markets have diversified. EU and East European markets have grown strongly and reliance on the US market relatively declined.
- The main consumer countries in Europe are Germany, Holland, Poland, Ukraine, Italia, Rumania, United Kingdom, and Belgium.



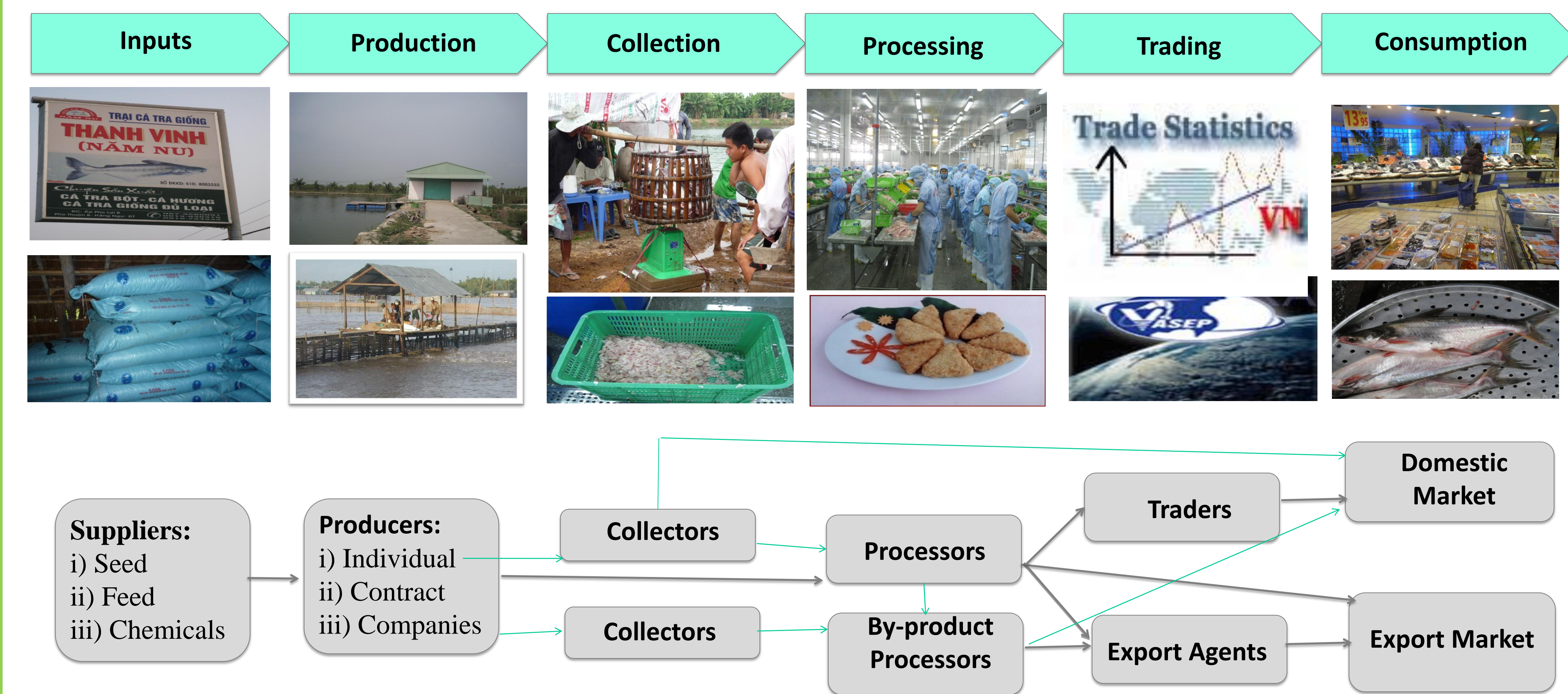
### What do European consumers want?

- Europe is the biggest seafood market in the world.
- Around 50% of seafood consumed in EU is imported.
- Europe is the biggest export market for Vietnamese catfish products.
- Factors affecting seafood purchasing decisions:
  - High demand for convenience food: consumers often lack knowledge about seafood and the skill to prepare it.
  - Price consciousness: consumers want sustainable qualities but at a low price.



- A high proportion of catfish enter the food service sector i.e. canteens, restaurants, pubs, etc..
- Supermarkets are in turn strongly influenced by pressures from environmental non-governmental organisations (NGOs).
- Most pangasius is marketed as a low cost substitute for marine wild fish.

### Value chain cluster



### Stakeholder perceptions on factors affecting the future of their operations

| Category                      | Sustainability factors               | Seed producers | Grow-out producers | Input suppliers | Processors | Govt. officials |
|-------------------------------|--------------------------------------|----------------|--------------------|-----------------|------------|-----------------|
| Economics issues:             | Limited availability of capital      |                | *                  |                 | *          |                 |
|                               | Poor access to improved technologies | *              |                    |                 |            |                 |
|                               | High input costs                     |                |                    | *               |            |                 |
|                               | Unstable raw material supply         |                |                    |                 | *          |                 |
| Environmental issues:         | Low and unstable product price       |                | *                  |                 | *          | *               |
|                               | Disease & predation                  | *              | *                  |                 |            | *               |
|                               | Negative environmental impact        |                |                    |                 |            | *               |
|                               | Inconsistent seed quality            | *              | *                  | *               |            | *               |
| Institutional /social issues: | Erratic water quality & availability | *              | *                  | *               |            | *               |
|                               | Unpredictable weather                | *              | *                  |                 |            |                 |
|                               | Job losses due to market instability |                | *                  |                 | *          |                 |
|                               | Ineffective regulation & policy      |                |                    | *               | *          | *               |

### We want you to be involved!

- Next year SEAT wants to work with businesses along the value chain to help deal with their sustainability concerns.
- If you would like be our partner in this 'action-research' process or if you have any comments on this poster please contact us.

### Further information

- The SEAT project (2009-2013) is funded under the European Union Framework Programme 7 (FP7) and coordinated by the University of Stirling, UK.
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