



## Sustaining the Shrimp Value Chain in Vietnam

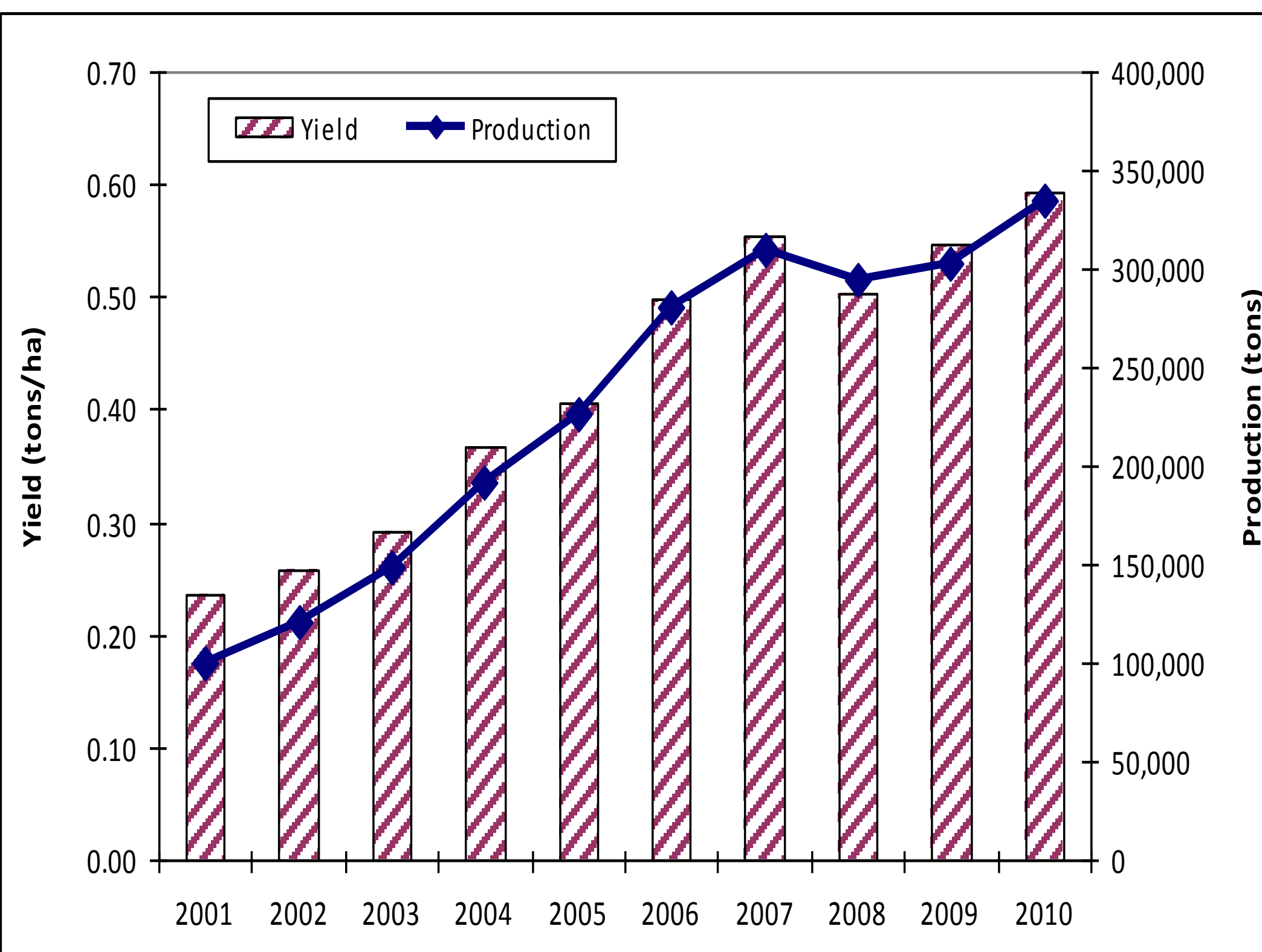


### What is SEAT?

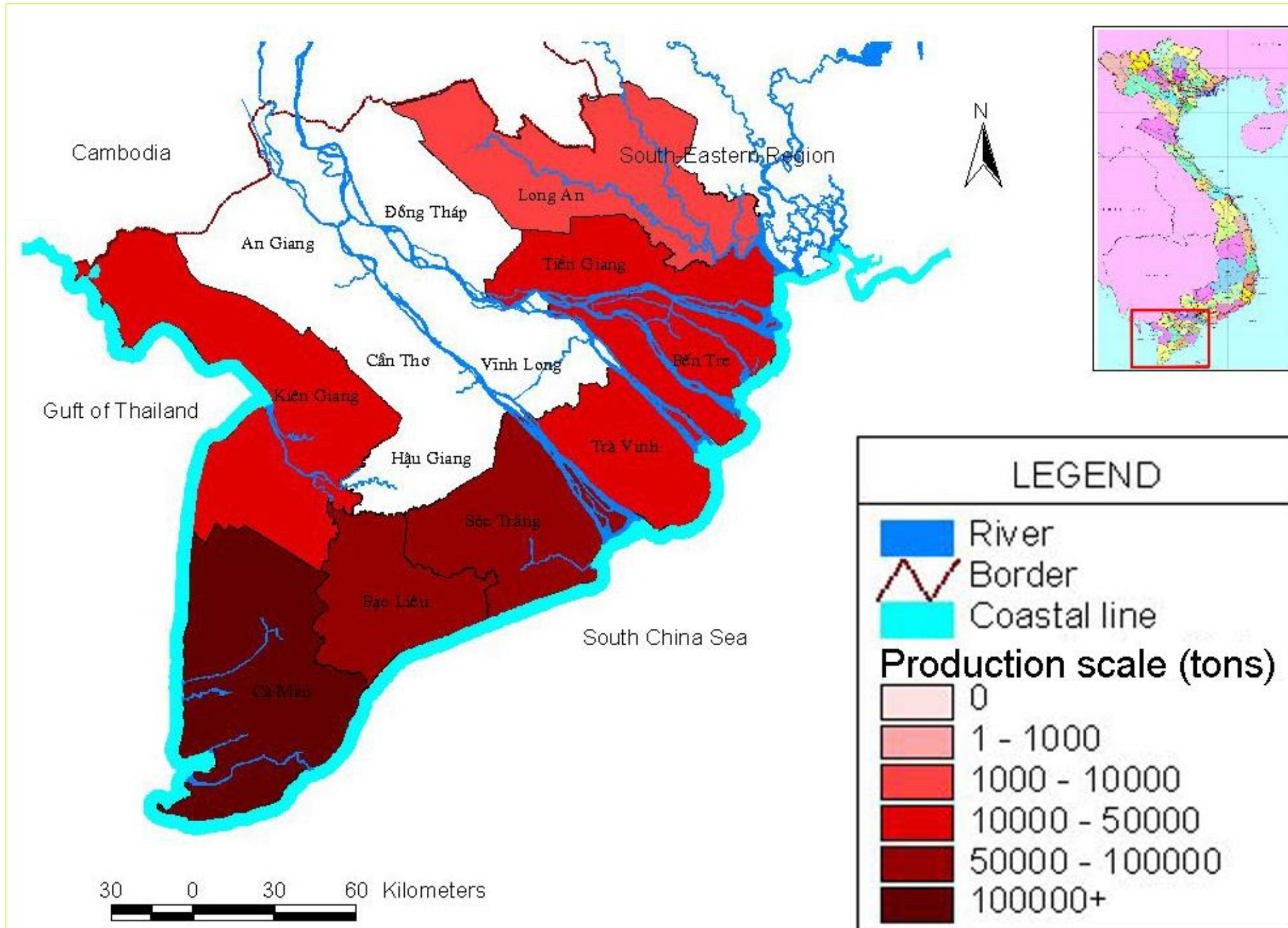
- The Sustaining Ethical Aquaculture Trade (SEAT) project works in four major Asian seafood producing countries such in the world, namely China, Bangladesh, Thailand, and Vietnam.
- In Vietnam, SEAT is coordinated by Can Tho University and working with various stakeholders along the shrimp value chain to understand and address sustainability issues related to shrimp 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.

### Shrimp in Vietnam

- Shrimp production in the Mekong Delta (MKD) has a very important role in aquaculture sector of Vietnam, it accounted for 88% of Vietnam's total shrimp cultured area and 65% of shrimp production in 2010.
- Shrimp farming has grown significantly in both aquaculture area and production in recent years.



- The three provinces which contribute most to shrimp production are Ca Mau, Bac Lieu, and Soc Trang, accounting for 76% of the total production in 2010.

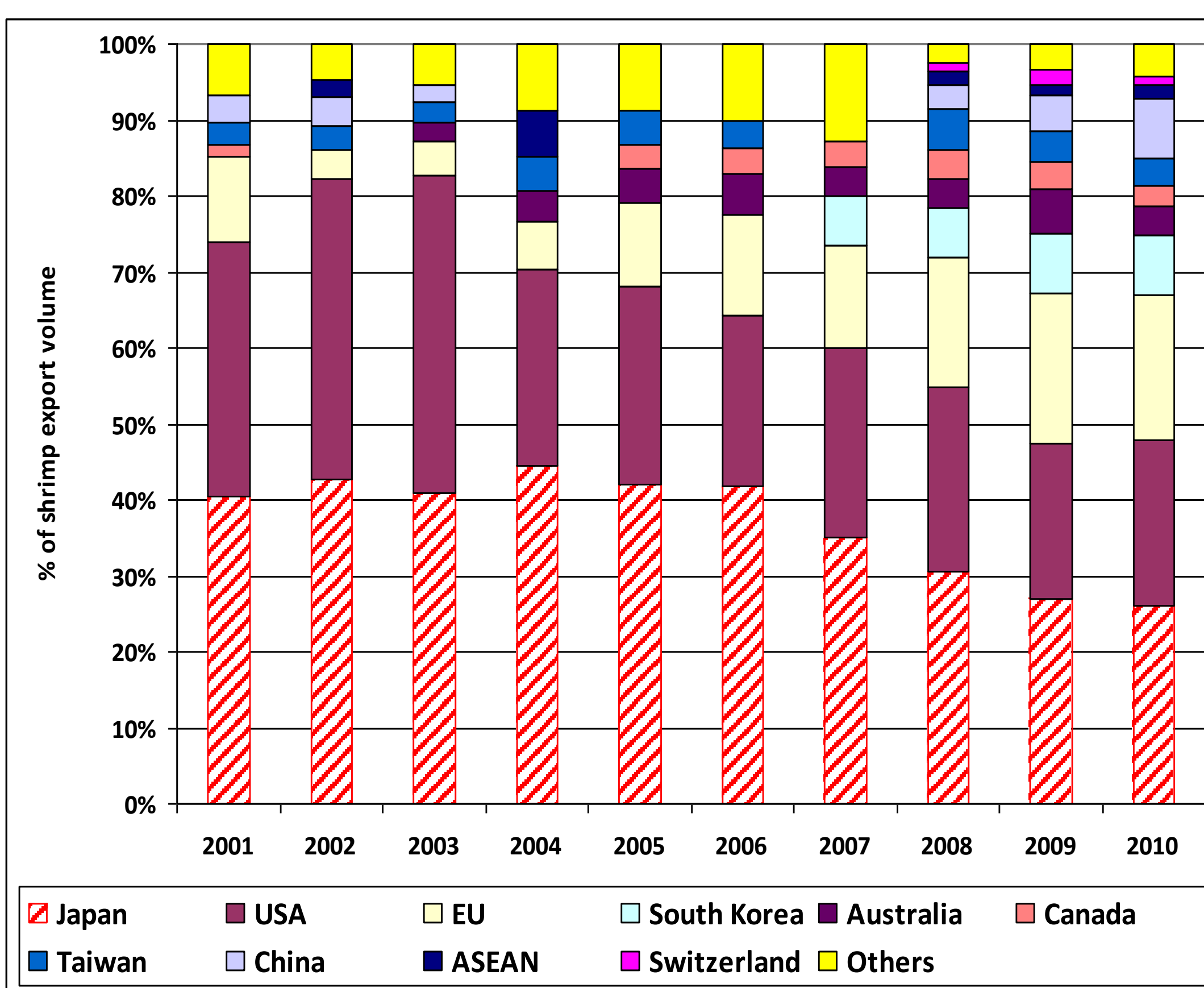


### Farming systems

- Shrimp farming systems in the MKD are highly variable (in 2010):
  - Low input systems include production integrated within mixed use mangroves or rice fields: stocking density ~3-6 PL/m<sup>2</sup> → harvest ~250-700 kg/ha. 90% of total culture area is used to produce 62% of total production
  - Semi-intensive: stocking density ~10-15 PL/m<sup>2</sup> → harvest ~1.0-2.0 tons/ha. This system accounted for 2% of culture area and contributed an estimated 4% of production
  - Intensive: stocking density ~20-40 PL/m<sup>2</sup> → harvest ~2.5-6 tons/ha. This system contributed 8% of culture area but 34% of total production. Most intensive production is in Soc Trang and Bac Lieu provinces.

### Marketing & export

- Farmed shrimp has contributed an increasing proportion of Vietnam's exported fishery products over the last decade.
- In 2010, 228,813 tons of shrimp products were exported earning almost US\$ 2 billion. Shrimp accounted for 18% of the volume and 42% of seafood export value.
- Since 2001 the EU market share has increased, while the proportion exported to Japan and USA have declined.
- The main consumer countries in the EU are Germany, United Kingdom, France and Belgium.



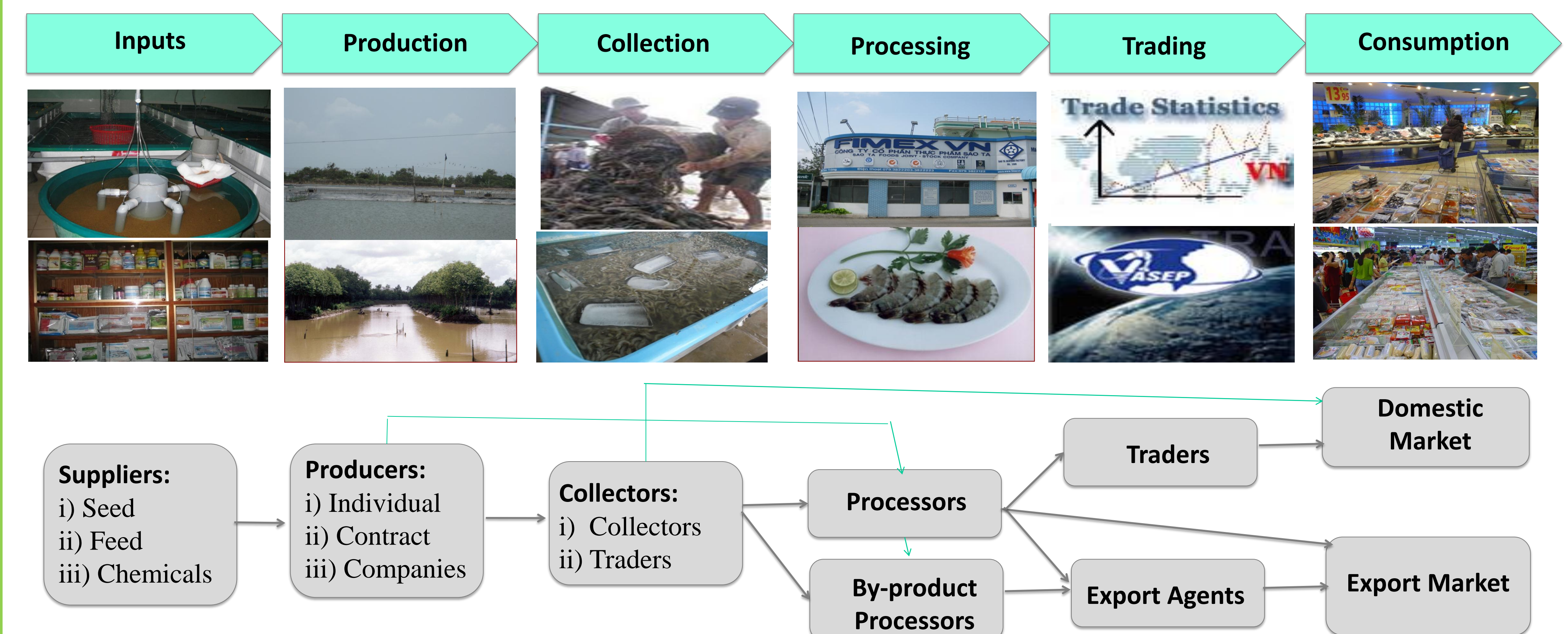
### What do European consumers want?

- Europe is the biggest seafood market in the world.
- Around 50% of seafood consumed in EU is imported.
- Japan is the biggest export market for Vietnamese shrimp products.
- Factors affecting seafood purchasing decisions:
  - Demand for convenience food: corresponds to lack of knowledge about, and how to prepare seafood.
  - Price consciousness: consumers want sustainable qualities but at a low price.



- More than half of all seafood is sold by supermarkets who shape consumer opinions as 'choice editors'.
- Supermarkets are in turn strongly influenced by pressures from environmental non-governmental organisations (NGOs).
- The balance goes to the food service sector, i.e. canteens, restaurants, pubs, etc..
- There is a premium market for organic & less intensively farmed food which has so far been underexploited.

### 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		*		*	
	High input costs			*		
	Unstable raw material supply				*	
	Unstable product price				*	
	Unstable markets			*		
Environmental issues:	Disease & predation		*			*
	Disease management	*				
	Negative environmental impact					*
	Inconsistent seed quality			*		*
Institutional /social issues:	Erratic water quality & availability	*	*	*		*
	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.
- Local contact: Associate Prof. Dr. Nguyen Thanh Phuong (M: +84-913870344; E: [ntphuong@ctu.edu.vn](mailto:ntphuong@ctu.edu.vn)); Dr. Vu Nam Son (M: +84-939480663; E: [vson@ctu.edu.vn](mailto:vson@ctu.edu.vn))
- International contact: Dr. Francis Murray (E: [fim3@stir.ac.uk](mailto:fim3@stir.ac.uk)); or visit our websites: [www.seat.ctu.edu.vn](http://www.seat.ctu.edu.vn) and [www.seatglobal.eu](http://www.seatglobal.eu)
- Mail address: College of Aquaculture & Fisheries, Can Tho University, Campus 2, 3/2 Street, Ninh Kieu District, Can Tho City, Vietnam