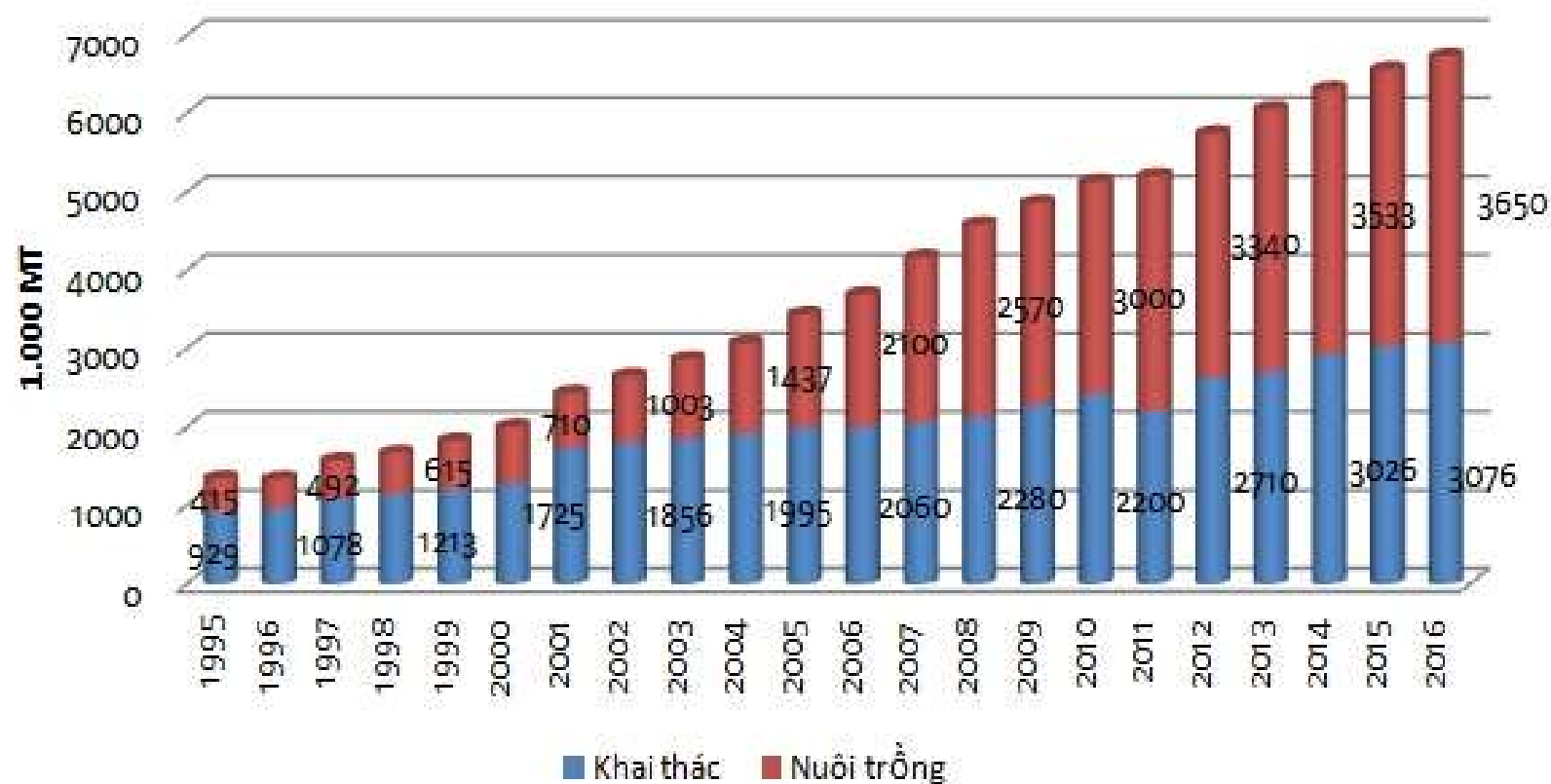


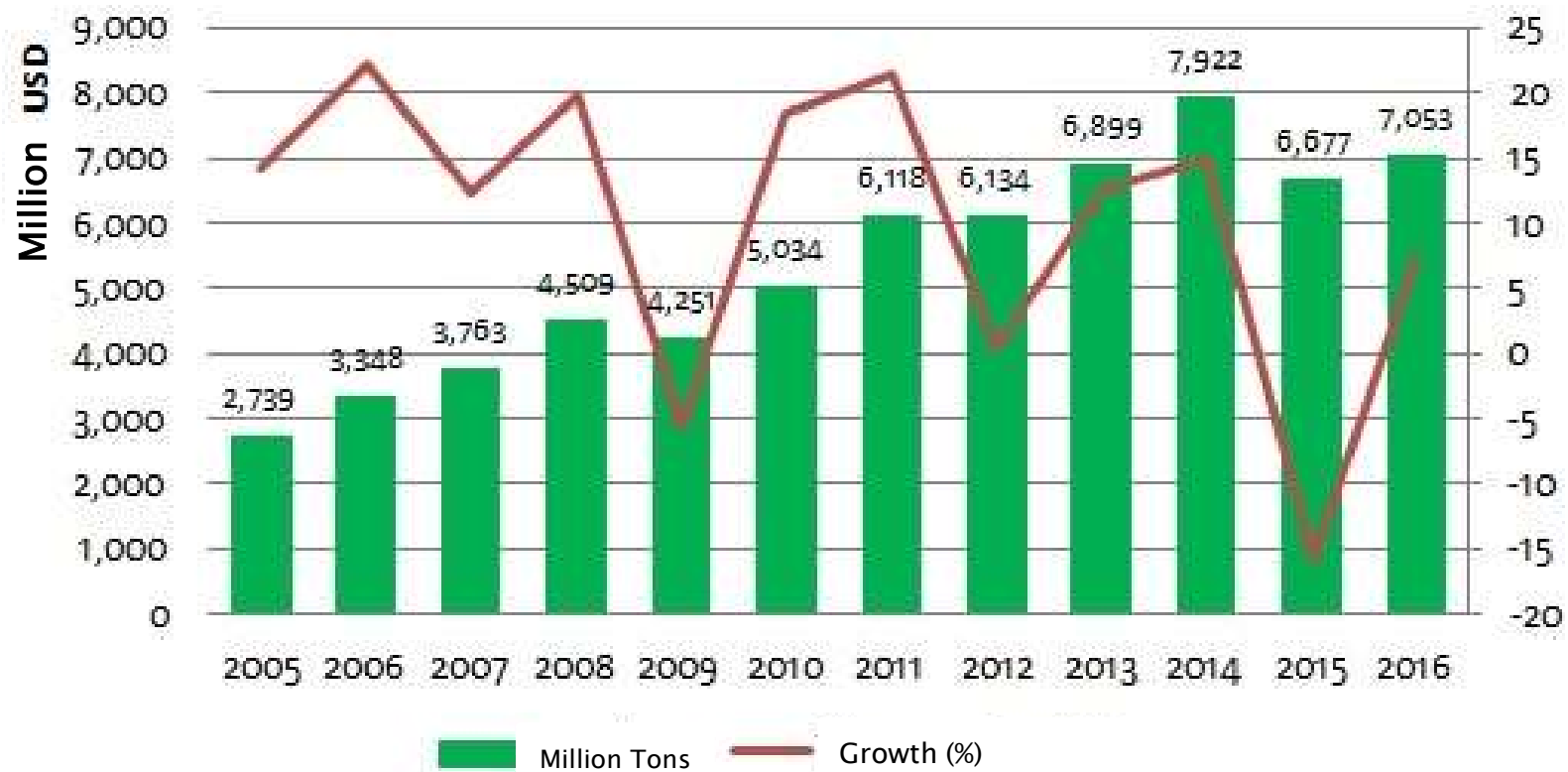
Vietnamese Aquaculture Industry



Aquaculture and capture fisheries production in Vietnam



Vietnamese Aquatic Production for Export 2005 - 2016

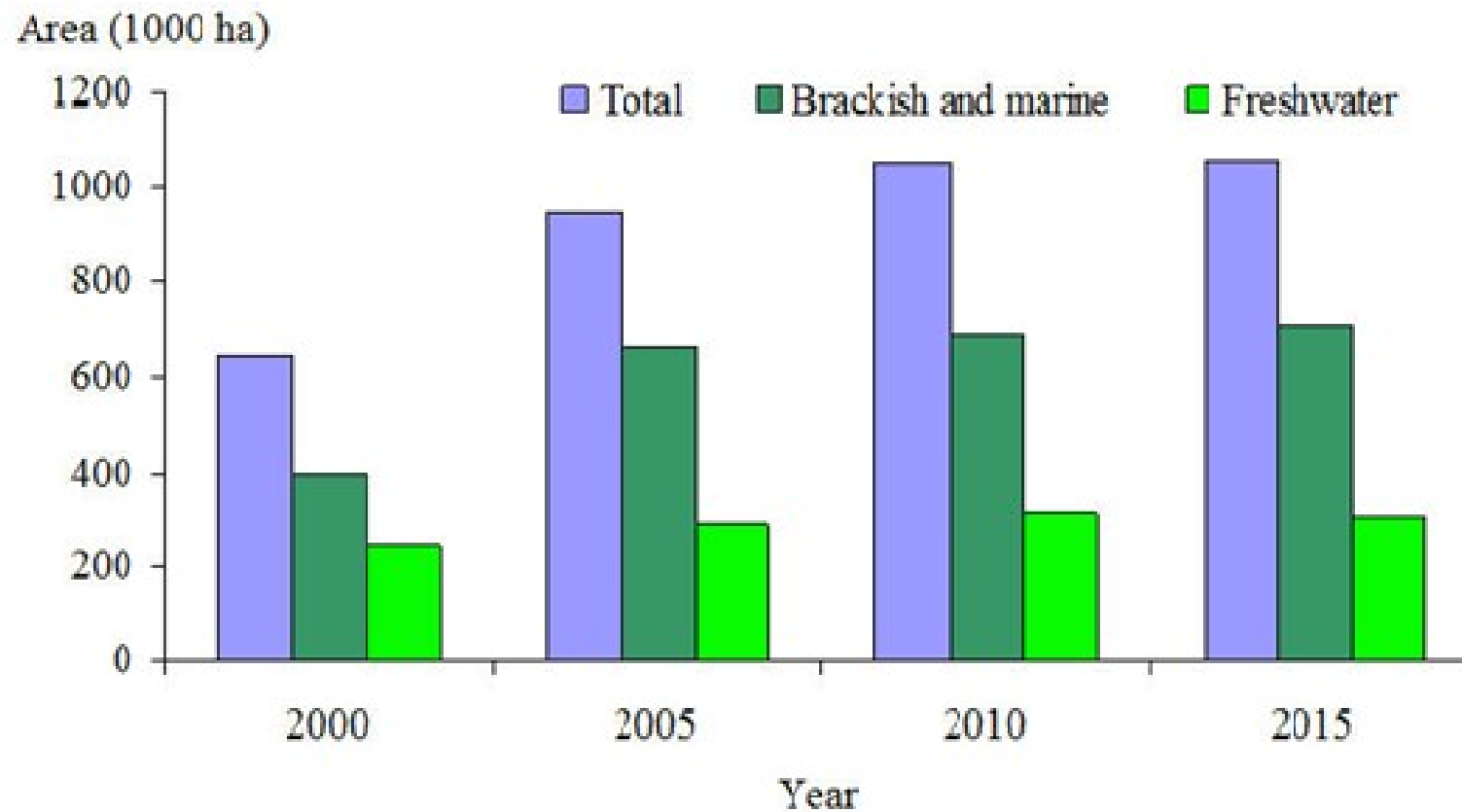


Aquaculture area in Vietnam 2015

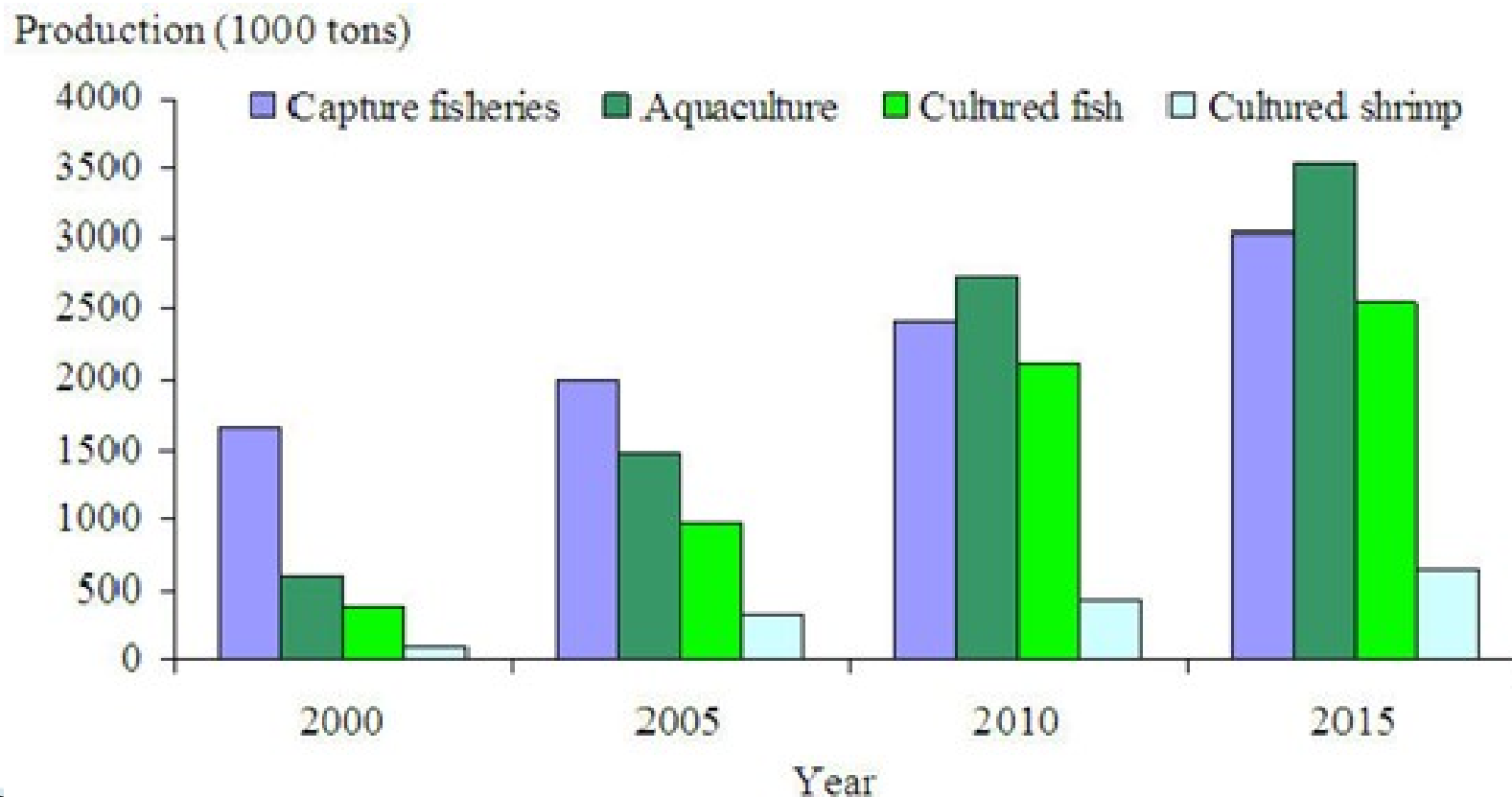
Water Surface Area for Aquaculture 2015p ('000ha)

Production System	Water Surface Area ('000ha)	% of Total
Marine Aquaculture	252.7	23.9%
• Fish	0.7	0.1%
• Shrimp	218.0	20.6%
• Mixed & Other Aqua Products	34.0	3.2%
Brackish Water	492.4	46.6%
• Fish	24.0	2.3%
• Shrimp	443.9	42.0%
• Mixed & Other Aqua Products	24.5	2.3%
Freshwater	307.8	29.1%
• Fish	300.1	28.4%
• Shrimp	6.3	0.6%
• Mixed & Other Aqua Products	1.3	0.1%
Breeding	4.4	0.4%
Total	1,057.3	100.0%

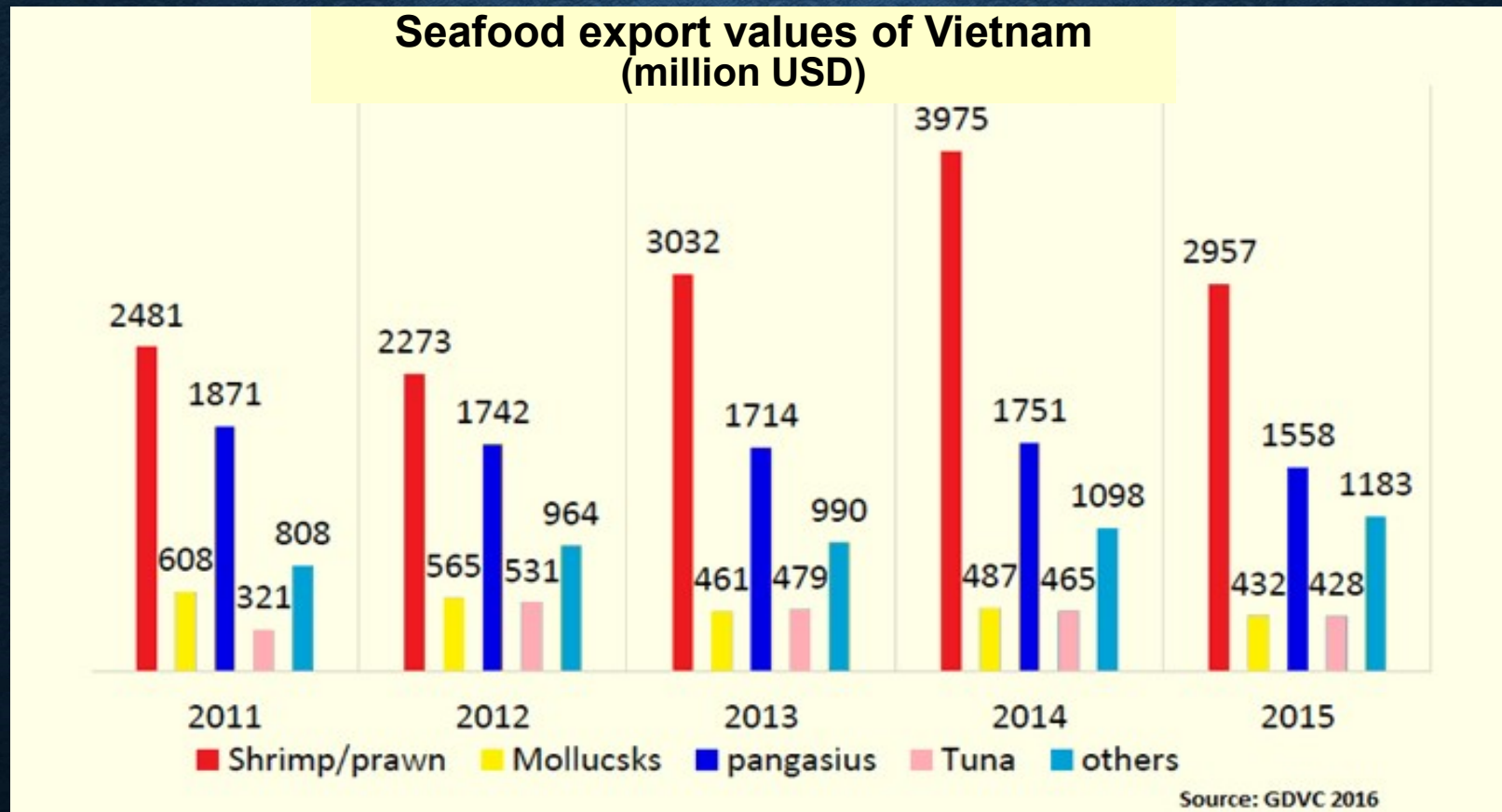
Aquaculture area of Vietnam by year



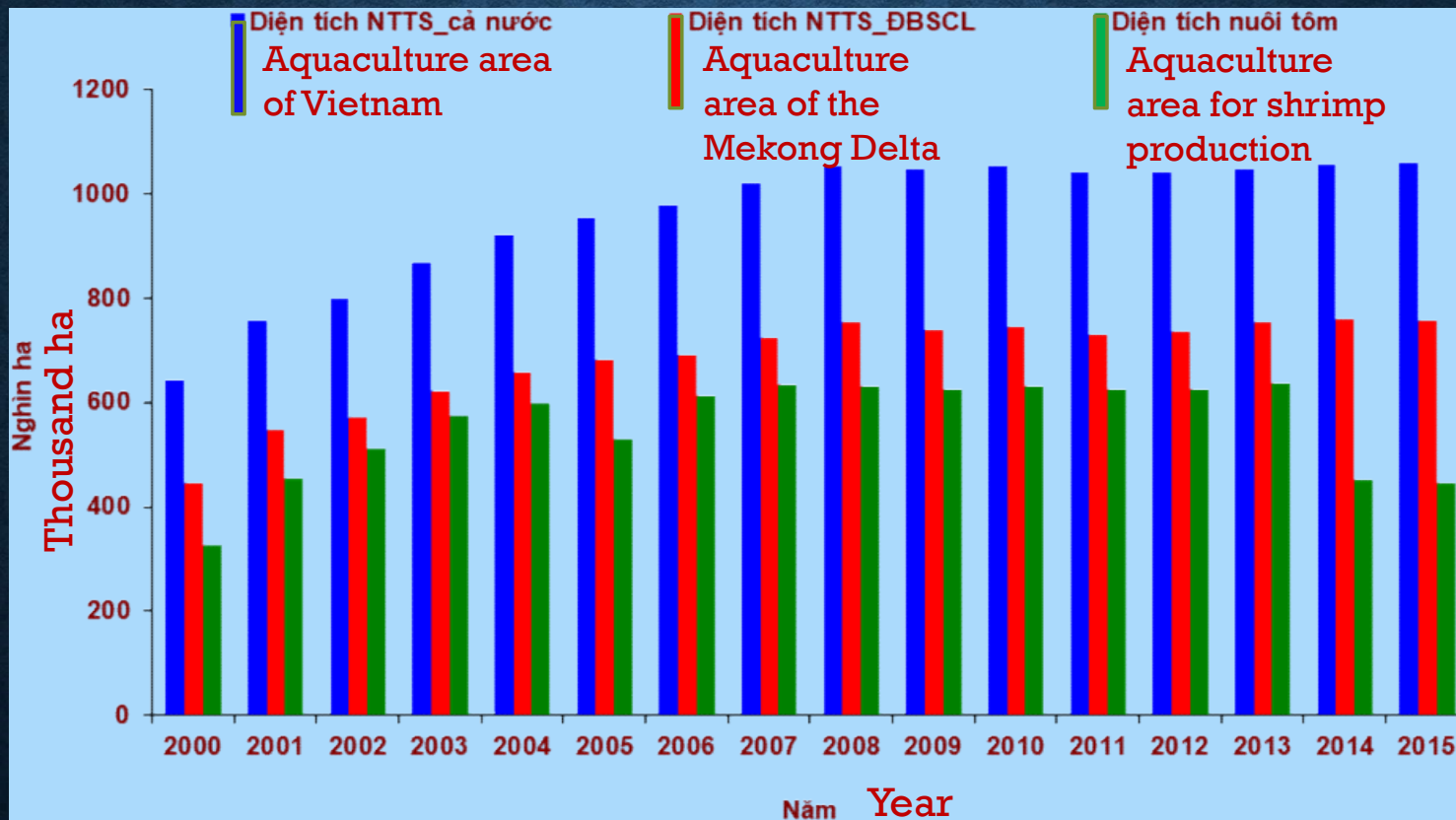
Aquaculture production of Vietnam by year



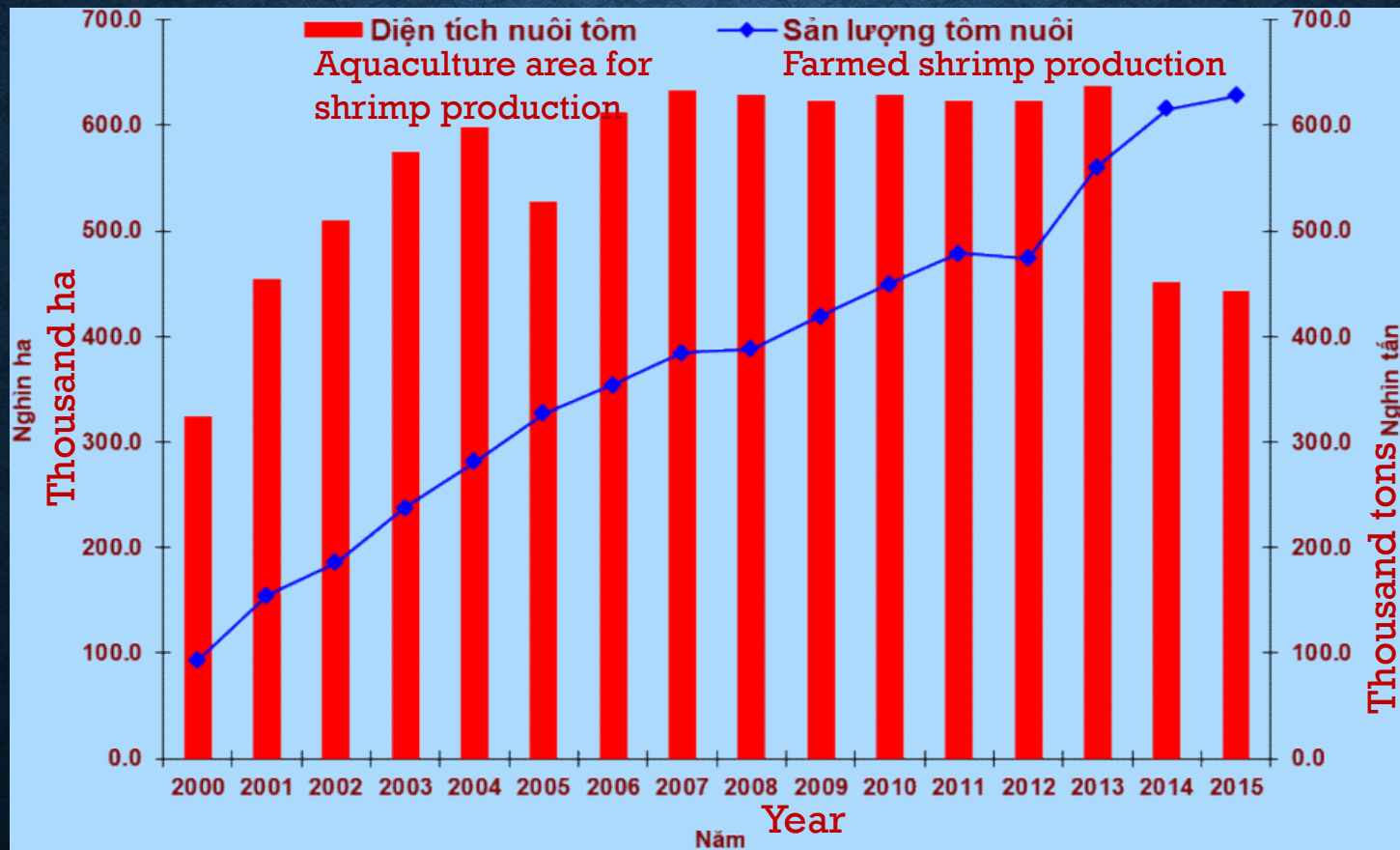
SEAFOOD EXPORT BY VIETNAM



AQUACULTURE PRODUCTION VIETNAM



AQUACULTURE PRODUCTION VIETNAM



Fisheries processing



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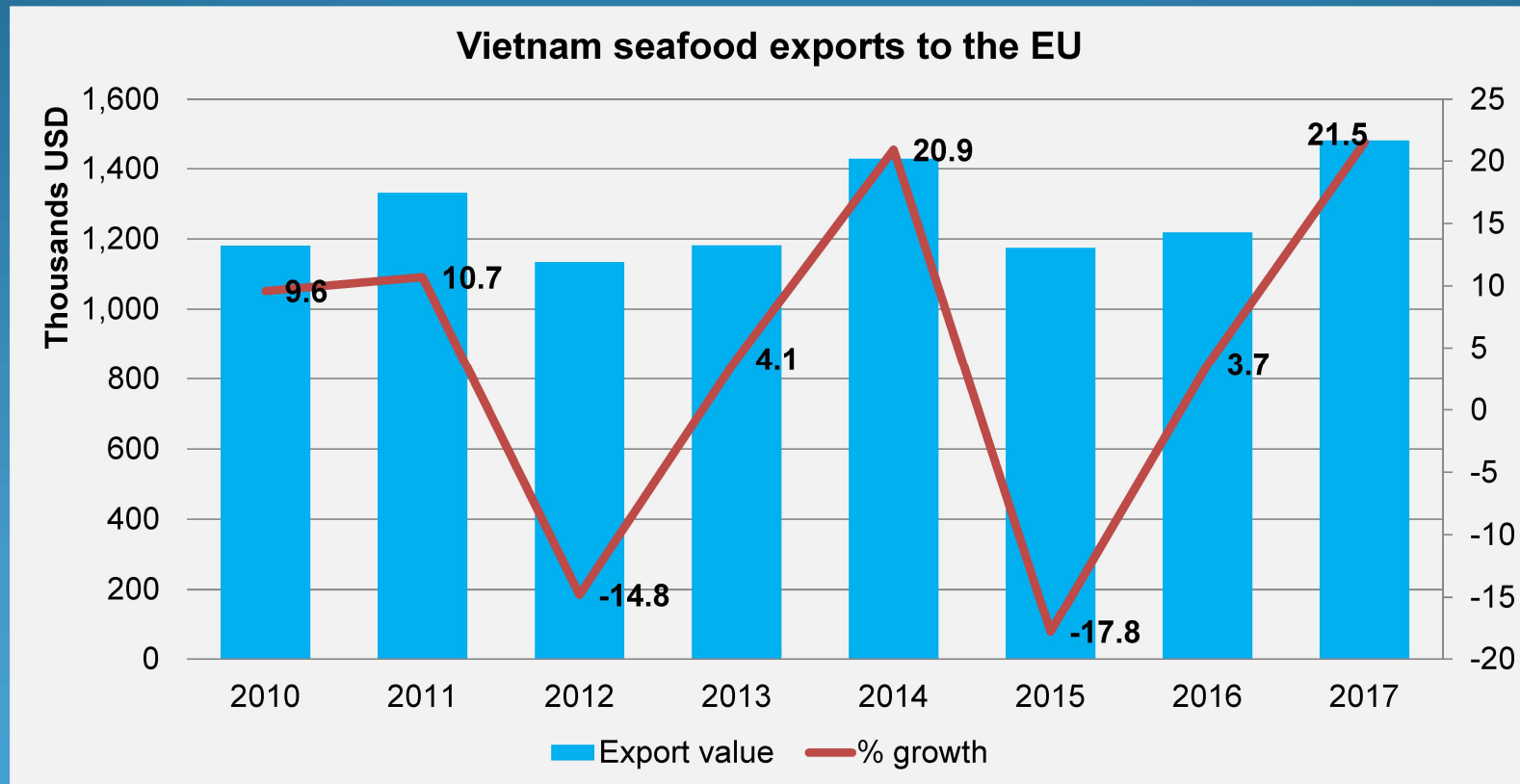


Seafood exports to the EU

In 2017: shipments to EU got the peak of **1.5 billion USD**, up **21.5%**.

2nd biggest import market

accounting for **19 – 22%**



Seafood exports to the EU

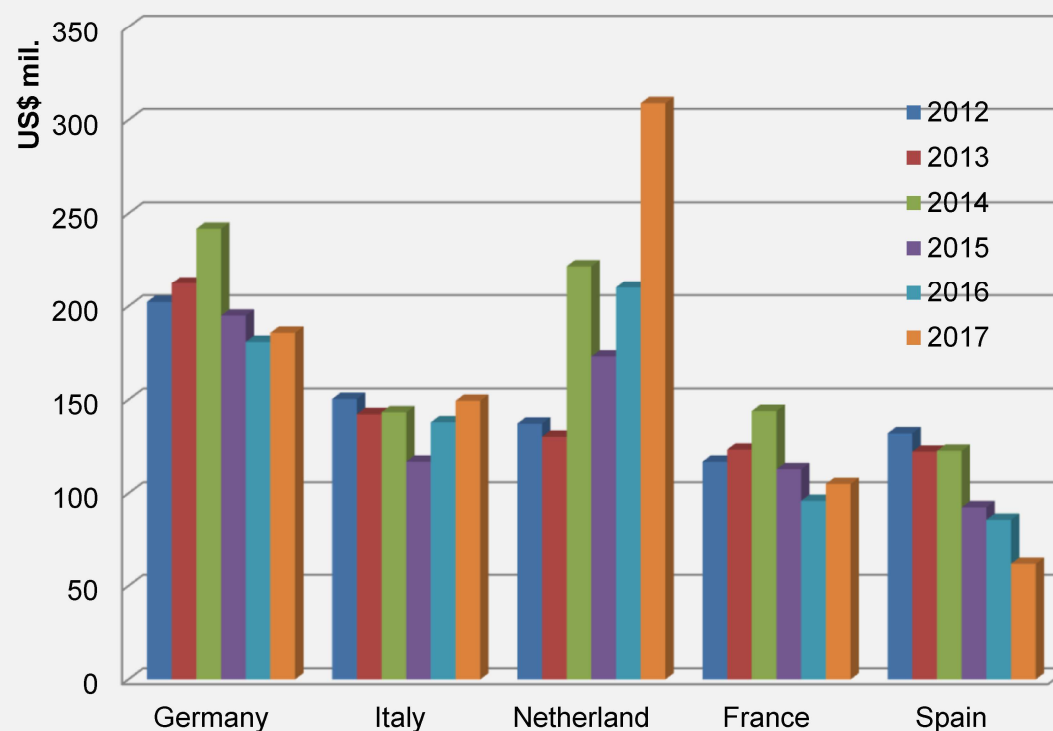
Top 5: Germany, Italy, Netherland, France and Spain, accounting for **58 – 65%** total exports to the EU.

Only exports to Netherland sharply increased by **125%** (2012 – 2017); to others decreased.

Exports to top 5 markets in the EU (Germany, Italy, Netherland, France and Spain)

Year	Total value (thousand USD)	(%) Share Top 5/total EU
2012	738,889	65.1
2013	730,552	61.8
2014	873,622	61.1
2015	690,448	58.7
2016	710,782	58.3
2017	811,069	54.8

Vietnam seafood exports to top 5 markets in the EU



Seafood exports to the EU

Shrimp makes the biggest & increasing share, up to nearly 60% of exports to the EU

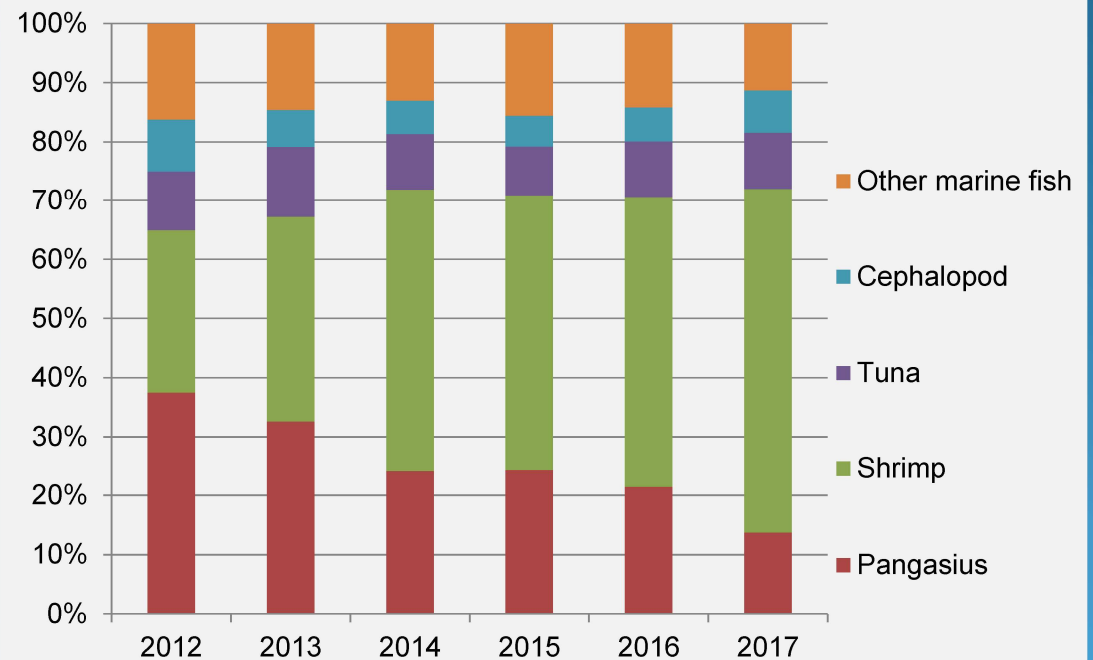
Pangasius share decreased from 35% to 14%

Marine products account for 28-30%, is decreasing

Seafood products exported to the EU (thousand USD)

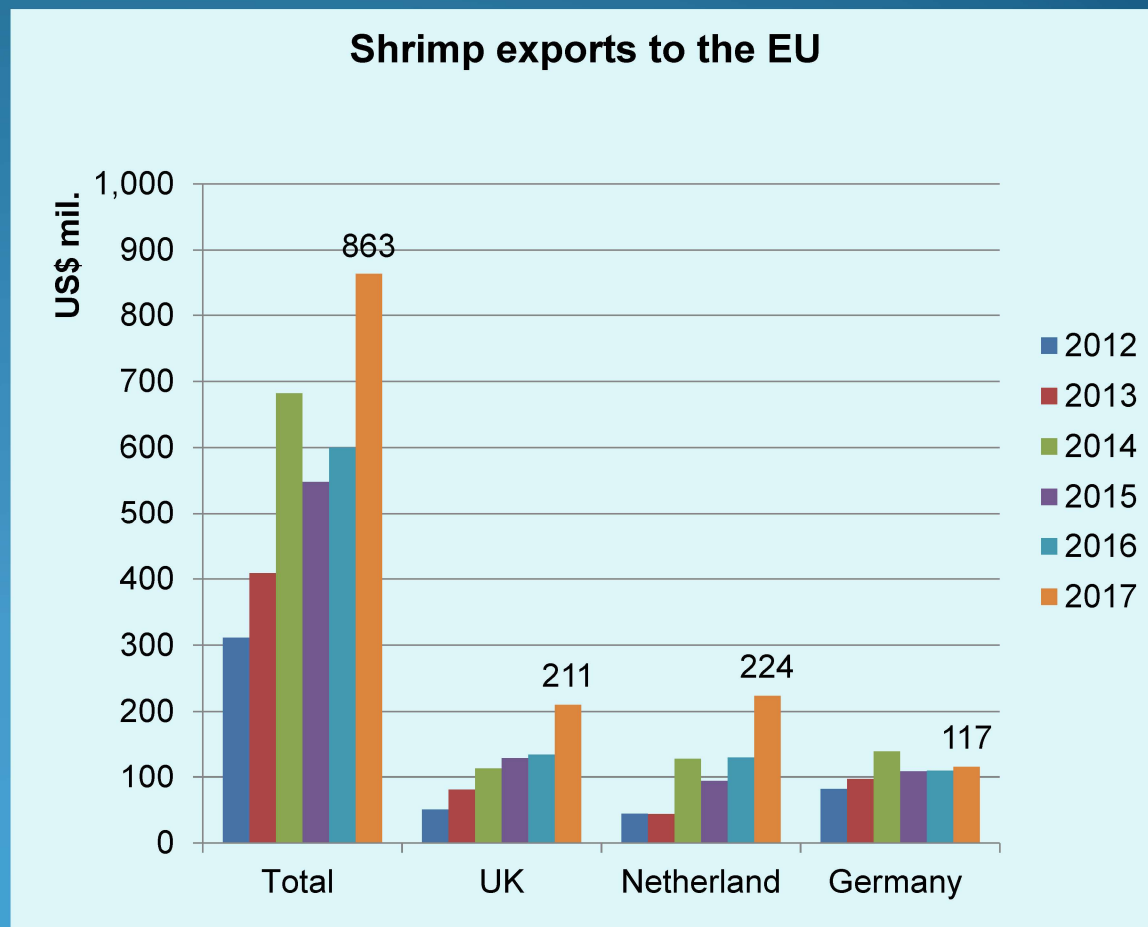
Products	2015	2016	2017
Pangasius	285,101	261,125	203,023
Shrimp	548,582	600,369	862,818
Tuna	97,375	115,316	141,936
Cephalopod	61,456	70,004	106,102
Other marine fish	182,773	172,537	166,838
Total	182,773	172,537	166,838

Vietnam seafood products exported to the EU



Shrimp exports to the EU

- EU accounts for 22% of VN shrimp exports
- In 2017: up 45%
- Top 3 markets: UK, Netherland & Germany account for 64%
- To UK, Netherland: up trend
- To Germany: stable

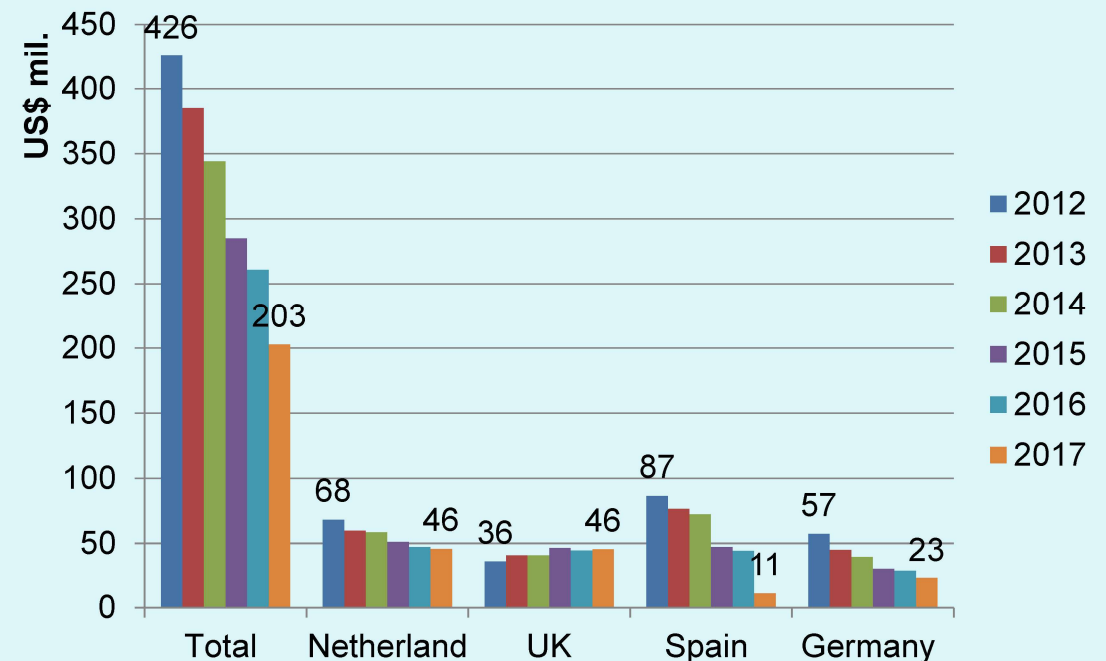


Pangasius exports to the EU

- EU makes up 11% VN pangasius exports
- Exports to EU continuously decreased from 426 mil. USD to 203 mil. USD, down 50%.
- To Spain & Germany sharply dropped.
- Some main reasons: lower demand & and negative media in Spain, Germany, affecting to consumption.



Pangasius exports to the EU



Exports of marine products to the EU

- EU accounts for 16% VN marine product exports
- Marine products brings 28-30% exports value for VN
- Tuna for 10%
Cephalopod: 7%
Other marine fish: 11%
- Unstable and insufficient source of material → exports unstable.
Uptrent in recent 3 years

