Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Vietnam

Report of Phase One

(25-30 August 2008)

International Cooperative Fisheries Organization
of the International Cooperative Alliance &
Vietnam Cooperative Alliance

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(25-30 August 2008)

**International Cooperative Fisheries Organization of the International Cooperative Alliance &
Vietnam Cooperative Alliance**

Report prepared by

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Preface

It is estimated that more than 90 percent of the world's fishers are engaged in small-scale fisheries and aquaculture, contributing to the food and nutritional requirements of the growing global population. Asia accounts for an overwhelming majority of the small-scale fishers and fish farmers and its contributions to the world's fish food supplies are substantial. It is also estimated that more than 75 percent of the world's major fisheries resources are either over-fished or depleted and require urgent management interventions. In this situation fisheries resource management with adequate participation of all stakeholders holds the key for sustainable development of the resources and enhancing food supplies from the fisheries sector.

In view of the fact that Asia is a major player in the global fish production and sustains the livelihoods of millions of fishers and fish farmers, it is essential that fisheries resource management, particularly by the coastal small-scale fishers/ fish farmers is promoted and sustained. This need has been well-recognized by the Ministry of Agriculture, Forestry and Fisheries (MAFF), Government of Japan. The MAFF, also appreciative of the fact that the cooperatives can play an important role in this regard, has therefore initiated financial assistance to the International Cooperative Alliance (ICA), through International Cooperative Fisheries Organization (ICFO), one of the specialized organizations of ICA, for implementing a training project entitled, 'Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Asia (CFRM Training Project)'.

This Training Project has been approved for a period of five years, starting from the Japanese Fiscal Year (JFY), 2006 to JFY 2010. In the CFRM Training Project, the ICFO selects one country in Asia every year. In JFY 2006, the Philippines was selected and in JFY 2007, the Project was implemented in Thailand. In JFY 2008, ICFO has selected Vietnam for implementation of the CFRM Training Project.

The CFRM Training Project comprises three Phases, which are as follows:

1) Phase One - Dispatching of experts to the selected country: This is a planning mission for Phases Two and Three and involves visits to organizations/ institutions concerned in the selected country; exchange of views on various aspects of community-based fisheries resource management and collection of information as appropriate for implementation of the subsequent two phases.
2) Phase Two - Study visit in Japan: This phase includes visit of selected representatives from the participating country to Japan to study the Japanese experience in community-based fisheries resource management. The participants include representatives from fisher organizations such as cooperatives, government institutions and experts.
3) Phase Three – A National-Level Seminar in the participating country: The Seminar, involving a larger group of participants representing the fisheries cooperative sector, government departments/ agencies concerned with fisheries, academia and selected non-governmental organizations, aims at sharing of experiences gathered during Phases One and Two of the Project. The other activities include invited lectures, group discussions on selected themes and a field study visit. An important output of the Seminar is an agreed declaration and/or action plan. It is also expected that national agencies such as government departments and cooperative organizations would initiate adequate follow-up action(s) on the output of the Seminar.

The first Training Project (in JFY 2006) was implemented in the Philippines with the Cooperative Union of the Philippines (CUP) as the partner organization. The Project was successfully completed and culminated in the 'Palawan Declaration', a set of recommendations unanimously adopted by the participants in Phase Three Seminar held in the city of Puerto Princesa, Palawan Province, Philippines. The' Palawan Declaration' received an overwhelming support from the CUP and the Bureau of Fisheries and Aquatic Resources of the Government of Philippines and follow-up activities have been planned.

In JFY 2007, the Training Project was implemented in Thailand, with the Cooperative League of Thailand (CLT) as the partner organization. As in the case of Philippines, the Training Project in Thailand was also successfully completed and one of the most significant outputs in the Phase Three Seminar was the unanimous adoption of the 'Bangkok Declaration' by the participants. It is hoped that the CLT and the Department of Fisheries of the Government of Thailand would initiate action on the 'Bangkok Declaration'.

The Phase One activities of the Project in JFY 2008 were implemented during 25 – 30 August 2008 in Vietnam, with Vietnam Cooperative Alliance (VCA) as the partner organization. The Mission members of Phase One were as follows:

Dr Yugraj Singh Yadava
Director
Bay of Bengal Programme Inter-Governmental Organisation (BOBP-IGO)
91, St Mary's Road, Abhiramapuram
Chennai 600 018, India

Mr Masaaki Sato
Secretary
International Cooperative Fisheries Organization
of the International Cooperative Alliance
c/o JF ZENGYOREN, 1-1-12 Uchikanda, Chiyoda-Ku
Tokyo, Japan 101-8503

The Phase One Mission received warm welcome and overwhelming support and cooperation from the following organizations/ agencies they visited/ interacted with during their stay in Vietnam and I would like to extend my gratitude to them.

- Vietnam Cooperative Alliance;
- Ministry of Agriculture and Rural Development;
- Embassy of Japan in Hanoi;
- Nghe An Provincial Cooperative Alliance;
- Song Lam Fisheries Production and Services Cooperative, Nghe An Province;
- Ha Tinh Provincial Cooperative Alliance;
- Hung Manh Frozen Seafood Service Cooperative, Ha Tinh Province;
- Rang Dong Fishery Cooperative, Ben Tre Province;
- Peoples' Committee of Phuoc Tinh Commune, Ba Ria Vun Tau Province; and
- Quyet Thang Fishery Cooprative, Ba Ria Vung Tau Province.

On behalf of the ICFO, I would like to extend my heart-felt gratitude to Dr Yugraj Singh Yadava, Director, BOBP-IGO for his contributions and support as Chief Adviser to this Training Project. I would also like to extend my special thanks to Ms Tran Thu Hang, Program Officer, International Relations Department, VCA, for her unstinted assistance and cooperation in implementation of the Phase One activities in Vietnam.

Last but not the least, I would like to extend my deepest gratitude to Dr Nguyen Tien Quan, President of VCA, Mr Nguyen Xuan Hien, Vice-President of VCA, and Mr Vu Van Dzung, Director General, International Relations Department, VCA and all other staff of VCA for their support and active participation in implementation of the Phase One activities. I am confident, VCA, as a member organization of the ICFO, would continue to play an important role in successful implementation of this Training Project in Vietnam.

I hope Phases Two and Three will also be successfully implemented with the support and cooperation by all the parties concerned in Japan and Vietnam.

服部 郁弘

Ikuhiro Hattori
Chairman
International Cooperative Fisheries Organization
of the International Cooperative Alliance

1 September, 2008

Acknowledgement

The cooperation and assistance received from the following organizations/ agencies in successful completion of Phase One of the Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Vietnam is deeply acknowledged:

- Ministry of Agriculture, Forestry and Fisheries, Government of Japan.
- Ministry of Agriculture and Rural Development, Government of the Socialist Republic of Vietnam (Department of Aquaculture & Department of Exploitation and Natural Resources Protection).
- Vietnam Cooperative Alliance, Hanoi, Vietnam.
- Embassy of Japan, Hanoi City, Vietnam.
- Nghe An Provincial Cooperative Alliance, Nghe An Province, Vietnam.
- Song Lam Fisheries Production and Services Cooperative, Nghe An Province, Vietnam.
- Ha Tinh Provincial Cooperative Alliance, Ha Tinh Province, Vietnam.
- Hung Manh Frozen Seafood Service Cooperative, Ha Tinh Province, Vietnam.
- Ben Tre Provincial Cooperative Alliance, Ben Tre Province, Vietnam.
- Rang Dong Fishery Cooperative, Ben Tre Province, Vietnam.
- Ba Ria Vung Tau Provincial Cooperative Alliance, Vung Tau City, Vietnam.
- Quyet Thang Fishery Cooperative – Ba Ria Vung Tau Province, Vietnam.

Contents

1.0 Introduction

The International Cooperative Alliance (ICA) initiated a new Project entitled 'Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Asia' from 2006 by using the financial contributions from the Ministry of Agriculture, Forestry and Fisheries, Government of Japan. The International Cooperative Fisheries Organization (ICFO), one of the sectoral organizations of the ICA, is responsible for implementation of the Project.

The first country to be selected under the Project was the Philippines, where the Project was implemented during the Japanese Fiscal Year(JFY) April 2006 – March 2007. In the second JFY (April 2007 – March 2008), the Project was implemented in Thailand (see below Reports of Phase One, Two and Three of the Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in the Philippines and Thailand). In the third year of the Project, Vietnam has been identified, where the activities will be implemented during the period April 2008 to March 2009.

The purpose of this Training Project is to promote, in Vietnam, community-based fisheries resource management by small-scale fishers engaged in coastal fisheries and by their organizations (fisheries cooperatives), strengthen their activities, and help contribute to ensuring sustainable production, creation of employment opportunities and poverty alleviation.

The Project comprises the following three phases:

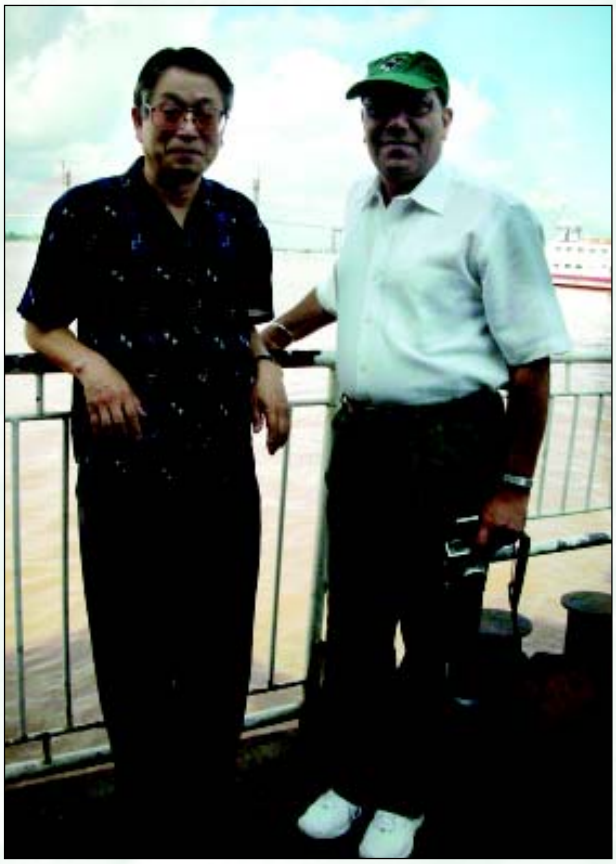
1) Phase One: Dispatching of Experts to Vietnam
2) Phase Two: Fisheries Resource Management Study Visit in Japan
3) Phase Three: Terminal Project Seminar in Vietnam

The Phase One of the Project was implemented in Vietnam during the period 25 – 30 August 2008.

1.1 Objective of the Mission

The objective of the Phase One Mission was to study the present state of affairs of fisheries resource management in Vietnam. This objective was envisaged to be accomplished through meetings with officials of the Partner Organization *i.e.* Vietnam Cooperative Alliance and officials of the concerned Ministries/ Departments/ representatives of the cooperative sector, fisher/ fish farmer associations/ groups, non-governmental organizations and other concerned stakeholders and collect information and/ or data that would help prepare for, and plan Phase Two (Study Visit to Japan) and Phase Three activities under the Training Project (Terminal Project Seminar in Vietnam), and thereby provide advice and suggestions, as appropriate to leaders of fisheries cooperatives and government administration officials in charge of fisheries resource management in Vietnam. Besides meetings and interactive sessions, a number of field visits were also part of the Phase One Mission to Vietnam.

Reports of the Training Project implemented in the Philippines and Thailand during JFY 2006 and 2007.



Members of the Phase One Mission – Mr Masaaki Sato (left) and Dr Yugraj Singh Yadava (right).

1.2 Members of the Mission

The mission in Phase One comprised the following two members (one expert and one representative of ICFO):

- **Expert**

  Dr Yugraj Singh Yadava, Director, Bay of Bengal Programme Inter-Governmental Organisation, Chennai, India.

- **ICFO Representative**

  Mr Masaaki Sato, Secretary, International Cooperative Fisheries Organization, Tokyo, Japan.

1.3 Partner Organization

The partner organization of the Project in Vietnam is as follows:

Vietnam Cooperative Alliance (VCA)
#77, Nguyen Thai Hoc
Ba Dinh District
Hanoi City
Socialist Republic of Vietnam
Tel: + 84 4 843 1689, 733 0774
Fax: + 84 4 843 1883
E-mail: admin@vca.org.vn, vca@vietnamcoop.org
Website: www.vca.org.vn

President: Dr Nguyen Tien Quan
Vice-President: Mr Nguyen Xuan Hien
Director General (International Relations): Mr Vu Van Dzung
Contact Person: Ms Tran Thu Hang, Programme Officer, Foreign Relations Department.

1.4 Itinerary of the Mission and Persons Met

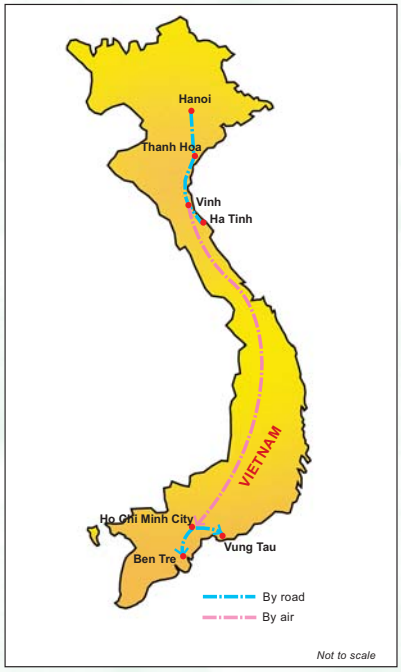
The Itinerary of the mission and the persons met in Vietnam during the period 25 – 30 August 2008 is as follows:

Date/ Time	Itinerary	Persons Met/ Participants
August 24 (Sunday) 12:30 -	Arrival at Hanoi by SQ 176 and proceed to Fortuna Hotel. *Fortuna Hotel, Hanoi*	Ms Tran Thu Hang, Programme Officer, International Relations Department, Vietnam Cooperative Alliance, 77, Nguyen Thai Hoc, Ba Dinh District, Hanoi, Vietnam. *Tel: + 84 (4) 843 1768;* *+ 0904574727 (Mobile)* *Fax: + 84 (4) 843 1883, 843 1768* *Email: thuhangvca@yahoo.com, vcaktdn@hn.vnn.vn*
August 25, (Monday) 09:45 - 11:30	Visit to Ministry of Agriculture and Rural Development (MARD) *Contact person:* Mr Bui Duc Quy, Deputy Director, Aquaculture Department, MARD, No 10, Nguyen Cong Hoan, Ba Dinh District, Hanoi, Vietnam *Tel: + 84 (4) 771 8615;* *+ 0913008152 (Mobile)* *Fax: + 84 (4) 771 8147* *Email: ntts@mard.gov.vn*	Mr Bui Duc Quy, Deputy Director, Aquaculture Department, MARD
11:30 - 12:40	**Lunch**	
12:40 - 16:00	Visit to Vietnam Cooperative Alliance (VCA) *Contact person:* Mr Vu Van Dzung, Director General, International Relations, 77, Nguyen Thai Hoc, Ba Dinh District, Hanoi, Vietnam. *Tel: + 84 (4) 747 1573;* *+ 0913222107 (Mobile)* *Fax: + 84 (4) 843 1768, 843 1883* *Email: vvdzung@yahoo.co.uk, vcaktdn@hn.vnn.vn*	Mr Vu Van Dzung, Director General, International Relations Ms Tran Thu Hang, Programme Officer, International Relations Department Ms Vu Thanh Thuy, Programme Officer, International Relations Department *(Tel: + 0903246724)* Ms Nguyen Thi Thu Hao, Programme Officer, International Relations Department *(Tel: + 0903266947)* Ms Tran Thi Ngan, Programme Officer, International Relations Department, VCA *(Tel: + 0915022732)*
16:00 - 17:00	Meeting with Mr Nguyen Xuan Hien, Vice-President, VCA *Tel: + 84 (4) 733 0774;* *+ 0913214168 (Mobile)* *Fax: + 84 (4) 843 1883* *Email: vca@vietnamcoop.org*	Mr Nguyen Xuan Hien Mr Vu Van Dzung Ms Tran Thu Hang
18:10 - 19:40	Dinner hosted by VCA at Nha Hang Pho Bien (Pho Bien Seafood Restaurant), 14 Trang Thi Street, Hanoi. *Fortuna Hotel, Hanoi*	Mr Nguyen Xuan Hien Mr Vu Van Dzung Ms Tran Thu Hang
August 26 (Tuesday) 07:00 - 09:00	Visit to Cho 19-12 Market at Hoa Qua, Hanoi City. The retail market sells vegetables, fruits, fish and fish products and livestock.	—

Date/ Time	Itinerary	Persons Met/ Participants
09:00 - 14:00	Consolidation of the information collected for preparation of Phase One Report at the Fortuna Hotel.	
14:00 - 15:30	Visit to Ministry of Agriculture and Rural Development (MARD) *Contact person:* Mr Pham Trong Yen, Deputy Director General, International Cooperation Department, MARD, #2, Ngoc Ha Street, Ba Dinh District, Hanoi, Vietnam. *Tel: + 84 (4) 734 7086;* *+ 0912252772 (Mobile)* *Fax: + 84 (4) 733 0752* *Email: yenpt.htqt@mard.gov.vn, ptrongyen@yahoo.com*	Mr Pham Trong Yen Dr Le Vien Chi Deputy Director, Aquaculture Department, MARD, No 10, Nguyen Cong Hoan, Ba Dinh District, Hanoi City, Vietnam. *Tel: + 84 (4) 771 5475* *Fax: + 84 (4) 771 8147* *Email: ntts@mard.gov.vn*
15:30 - 16:30	Visit to the Embassy of Japan. *Contact person:* Mr Rinya YUTANI, Second Secretary, Embassy of Japan, 27, Lieu Giai Street, Hanoi, Vietnam. *Tel: + 84 (4) 846 3000;* *+ 0903402397 (Mobile)* *Fax: + 84 (4) 846 3048* *Email: rinya.yutani@mofa.go.jp* *Fortuna Hotel, Hanoi*	Mr Rinya YUTANI
August 27 (Wednesday) 10:00 - 12:00	Field Study Visit until August 30, 2008 Visit to Nghe An Provincial Cooperative Alliance (Nghe An PCA). *Contact person:* Mr Nguyen Van Hung, President, Nghe An Provincial Cooperative Alliance,13, Nguyen Si Sach, Vinh City, Nghe An Province, Vietnam. *Tel: + 84 (038) 384 1139* *Fax: + 84 (038) 384 2858*	Mr Nguyen Van Hung, President,Nghe An PCA. Mr Nguyen Tien Hung, Vice-President, Nghe An PCA. Mr Cung Dinh Che, Vice-President, Nghe An PCA.
12:00 - 14:00	Lunch hosted by the Cooperative at Nha Hang Lam Giang, a restaurant operated by Song Lam Fisheries Production and Services Cooperative (Song Lam FPSC).	
14:00 - 17:00	Visit to the Fish Landing Centre of the Nghe An PCA and Song Lam FPSC and their Nuoc Mam (Fish sauce) manufacturing unit. *Contact person:* Mr Le Thanh Ty, Chairman, Song Lam Fisheries Production and Services Cooperative, Hai Trieu Group, Nghi Hai Precinct, Cua Lo Town, Nghe An Province,Vietnam. *Tel: + 84 (038) 3211 468* *Fax: + 84 (038) 3382 9195* *Hotel Huong Sen*	Mr Nguyen Xuan Chuong, Vice-Chairman, Song Lam FPS Cooperative. Mr Le Thanh Ty, Chairman, SongLam FPSC Mr Nguyen Xuan Chuong, Vice-Chairman, Song Lam FSPC Ms Tran Thi Lai, Vice-Chairperson, Song Lam FPS Cooperative. Alliance (Nghe An PCA) Mr Nguyen Van Hung, President, Nghe An Provincial Cooperative Mr Nguyen Tien Hung, Vice-President, Nghe An PCA Mr Cung Dinh Che, Vice-President, Nghe An PCA Mr Pham Van Tan, Captain of the fishing vessel (gill netter) - ND2885TS.

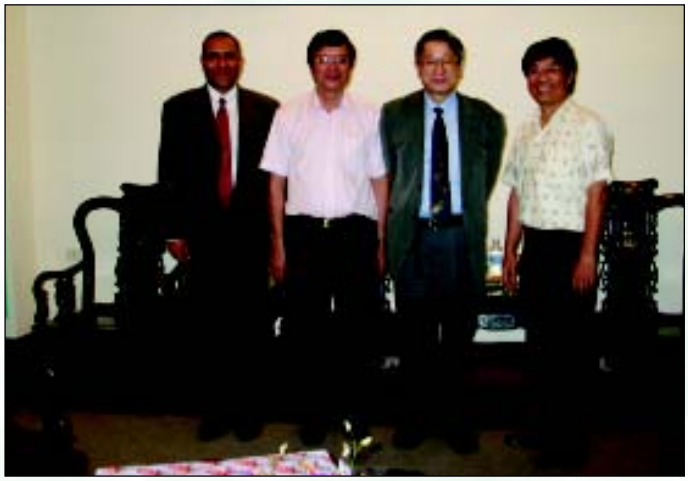
Date/ Time	Itinerary	Persons Met/ Participants
August 28 (Thursday) 07:50 - 08:45	Visit to the office of Ha Tinh Provincial Cooperative Alliance (Ha Tinh PCA) *Contact person:* Mr Le Van Manh, Vice-Chairman, Ha Tinh Provincial Cooperative Alliance, 75, Nguyen Chi Thanh Street, Ha Tinh Town, Ha Tinh Province,Vietnam. *Tel: + 84 (039) 881836;* *+ 0983859427 (Mobile)*	Ms Hoang Thi Kim Nhat, Department of Planning & Promotion, Ha Tinh PCA Ms Hoang Thi Hoa, Department of Training, Ha Tinh PCA Ms Ho Thi Hien, Chief, Training Department, Ha Tinh PCA Ms Nguyen Thi Thao, Staff, Ha Tinh PCA Ms Tran Thi Hien, Staff, Ha Tinh PCA
08:45 - 10:30	Visit to Hung Manh Fishery Cooperative and the Fishing Port in the Hung Manh Fishery Cooperative area in Ha Tinh Province. *Contact person:* Mr Phung Van Hoa, Chairman, Cooperative of Frozen Seafood Service, Hung Manh, Long Hai Village, Thach Kim Quarter, Loc Ha District, Ha Tinh Province, Vietnam. *Tel: + 84 (039) 846329;* *+ 0988124796 (Mobile)*	Mr Phung Van Hoa, Chairman, Hung Manh FC Mr Tran Van Khanh, Vice-Chairman Hung Manh FC Mr Tran Ngoc Hieu, Chief Inspector, Hung Manh FC Mr Le Van Manh, Vice-President, Ha Tinh PCA
10:30 - 1100	Lunch hosted by the Cooperative at the sea side restaurant 'Long Vinh'.	
1400 -	Leave from Vinh City for Ho Chi Minh City by Vietnam Airlines (VN 375); arriving Ho Chi Minh City at 15:30. *Hotel Victory*	
August 29 (Friday) 06:30 - 17:30	Visit to Rang Dong Fishery Cooperative (Rang Dong FC), Thoi Thuan Commune, Binh Dai District, Ben Tre Province, Vietnam. Lunch hosted by the Rang Dong FC *Contact person:* Mr Nguyen Quoc Dung, Chairman, Rang Dong Fishery Cooperative, Thoi Loi l Village, Thoi Thuan Commune, Binh Dai District, Ben Tre Province, Vietnam. *Tel: + 84 (75) 852161;* *+ 091 313 1057 (Mobile)* *Fax: + 84 (75) 852874* *E-mail: htxrd97@yahoo.com.vn* *Hotel Victory*	Mr Nguyen Quoc Dung, Chairman, Rang Dong FC Mr Dang Van Ha, Officer, Rang Dong FC Mr Phan Chanh Thi, Vice-President, Ben Tre PCA Mr Kieu Van Vi, Vice-Chairman, Rang Dong FC Mr Huynh Van San, Accounting Section, Rang Dong FC Mr Pham Van Vu, Officer of Tho Thuan Commune People's Committee Mr Nguyen Xuan Hiep, Staff
August 30 (Saturday) 07:00 - 11:00	Visit to the Office of the People's Council – People's Committee of Phuoc Tinh Commune, Long Dien District, Ba Ria Vung Tau Province, Vietnam.	Mr Le Van Sam, President, People's Committee of Long Dien District (PCLDD) Mr Le Van Trung, Vice-President, PCLDD Mr Tran Dang Khoa, Chairman, People' Committee of Phuoc Tinh Commune Mr Tran Tien Dung, Vice-Chairman of People' Council of Phuoc Tinh Commune Mr Nguyen Van Tot, Vice-Director of Party Secretariat of Long Dien Disitrict Mr Thai Thanh Hai, Director, Agricultural Division of Phuoc Tinh Commune

Date/ Time	Itinerary	Persons Met/ Participants
		Mr Lam Van Hong, Vice-Director of Administration Office of People's Council of Long Dien District Mr Cao Xuan Tieu, Vice-Director, Agricultural Service of Ba Ria Vung Tau Province Mr Van Ngoc Chuong, President, Ba Ria Vung Tau Cooperative Alliance (Ba Ria Vung Tau PCA) Mr Ngo Quang Trung, Vice-President, Ba Ria Vung Tau PCA Mr Nguyen Hong Ai, Vice-President, Ba Ria Vung Tau PCA Mr Nguyen Trinh, Chairman, Quet Thang Fishery Cooperative Mr Phan Thach, Vice-Chairman, Quyet Thang Fishery Cooperative Mr Nguyen Trung Hieu, Director of Administration Office of MARD Department of Long Dien District Mr Nguyen Xuan Hanh, Economic Expert, Southern Permanent Organization of VCA
11:00 - 13:00	Lunch hosted by the People's Committee of Phuoc Tinh Commune at the restaurant 'Phuong Linh'	Mr Nguyen Van Ba Mr Nguyen Trung Hieu Mr Pham Tinh Mr Lam Van Hong Mr Pham Van Tam Mr Nguyen Hong Ai Mr Thai Thanh Hai Mr Nguyen Ngoc Trung Mr Nguyen Van Tot Mr Le Van Sam Mr Van Ngoc Chuong Mr Ngo Van Trung Mr Nguyen Trinh Mr Nguyen Xuan Hanh
13:00 - 16:00	Visit to Quyet Thang Fishing Harbour and Vung Tau City	Mr Nguyen Trinh Mr Van Ngoc Chuong Mr Nguyen Van Dong Mr Nguyen Hong Ai Mr Nguyen Xuan Hanh Mr Ngo Quang Trung
19:00 - 21:00	Dinner hosted by Dr Nguyen Tien Quan, President of VCA at Rex Hotel, Ho Chi Minh city. *Hotel Victory*	
August 31 (Sunday) 09:00 - 11:00	Wrap-up Meeting and Planning for Phase Two Programme in Japan	Dr Yugraj Singh Yadava, BOBP IGO Mr Masaaki Sato, ICFO Ms Tran Thu Hang, VCA
14:50 -	Dr Y S Yadava and Mr Masaaki Sato leave for Singapore enroute to Chennai and Tokyo respectively by SQ 173.	



Mission members with Mr Pham Trong Yen and Dr Le Vien Chi, MARD (top); with representatives of the People's Committee of Phuoc Tinh Commune (middle) and with members of the Rang Dong Fishery Cooperative (bottom).

Mission members with members of the Song Lam Fisheries Production and Services Cooperative (Song Lam FPSC), Nghe An Province.



Mission members with Mr Nguyen Xuan Hien, Vice-President and Mr Vu Van Dzung, Director General, International Relations, VCA (left) and with members of the Hung Manh Frozen Seafood Services Cooperative, Ha Tinh Province (right).

Mission members with members of the Ha Tinh Provincial Cooperative Alliance (left) and Song Lam FPSC (right).


CHINA
MYANMAR
Hanoi
LAOS
Thanh Hoa
GULF OF TONKIN
Vinh
Ha Tinh
THAILAND
Hue
Da Nang
CAMBODIA
VIETNAM
Nha Trang
GULF OF THAILAND
Ho Chi Minh City
Vung Tau
Ben Tre
SOUTH CHINA SEA
Ca Mau
MALAYSIA
Not to scale

2.0 Report

The Phase One of the Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Vietnam was undertaken from 25 – 30 August 2008. The members of the Phase One Mission comprised Dr Yugraj Singh Yadava, Director, Bay of Bengal Programme Inter – Governmental Organisation, India and Mr Masaaki Sato, Secretary, International Cooperative Fisheries Organization (ICFO), Japan. The Training Project in Vietnam is being implemented with Vietnam Cooperative Alliance (VCA) as the partner organization.

The Phase One Mission held meetings with officials of the VCA and the Departments of Aquaculture and Exploitation and Natural Resources Protection of the Ministry of Agriculture and Rural Development (MARD) in Hanoi. In the Provinces, the mission met with officials of the Provincial Cooperative Alliances, Fisheries Cooperative Societies, People's Committee and small-scale fishers. The mission also met with the concerned official of the Embassy of Japan in Hanoi, Vietnam.

The mission undertook extensive field visits covering coastal fisheries and aquaculture in Nghe An, Ha Tinh, Ben Tre and Ba Ria Vung Tau Provinces. These included visits to fisheries and aquaculture cooperatives, fishing harbours and fish landing sites and marketing outlets selling fish and fish products. The day-to-day itinerary of the mission and the names of the persons with whom the mission interacted are presented under Chapter 1.4 The following section of the Report briefly describes the present status of the fisheries and cooperative sectors in Vietnam.

2.1 Fisheries Sector

2.1.1 Introduction

The Socialist Republic of Vietnam is the easternmost country on the Indochina Peninsula in Southeast Asia. It shares common borders with China in the north and Laos and Cambodia in the west. To the east and south lies the South China Sea, which the Vietnamese call the East Sea. Vietnam is approximately 3 31 688 km² in area (not including Paracel Island or Hoang Sa and Spratley Island or Truong Sa). The perimeter of the country running along its international boundaries is 4 639 km.

Through the centuries, Vietnam has been called by many different names. The country has been known as Vietnam (in the Vietnamese languages, it is spelled in two words, Viet Nam) for only about 200 years. The first national name of Van Lang was given to the country by the Hung, or Lac, ethnic group, who were also the inventors of the wet-rice cultivation.

Vietnam is a land endowed with great physical beauty and diversity. Mountains and hills cover four fifths of Vietnam's territory with the Truong son range stretching over 1 400 km. The northern part of the country consists mostly of highlands and the Red River delta. The delta of the Red River (also known as the Song Hong), a flat, triangular region of 15 000 square kilometers, is smaller but more intensely developed and more densely populated than the Mekong River delta. The Mekong delta, covering about 40 000 square kilometers, is a low-level plain not more than three meters above sea level at any point and criss-crossed by a maze of canals and rivers.

With a population of over 86 million, Vietnam is the 13th most populous country in the world. Since introduction of *doi moi* or economic reform package in 1986, which paved the way for market economy in the country, there is a turnaround in the Vietnam economy. It achieved around 8 percent annual GDP growth from 1990 to 1997 and continued at around 7 percent from 2000 to 2005, making it the world's second-fastest growing economy. Vietnam is also the third-largest oil producer in Southeast Asia and

Table 1: Total Fish Production in Vietnam, 1950-2006

(Unit in tonnes)

Year	Capture		Aqua culture	Total	Year	Capture		Aqua culture	Total
	Inland	Marine				Inland	Marine		
1950	10 000	50 000	10 600	70 600	1979	97460	4 08 850	94 690	6 01 000
1951	10 000	50 000	10 630	70 630	1980	69040	3 91 460	99 160	5 59 660
1952	10 000	50 000	10 650	70 650	1981	85710	4 08 346	1 03 810	5 97 866
1953	10 000	50 000	10 780	70 780	1982	90 680	4 62 758	1 08 770	6 62 208
1954	9 500	1 10 000	21 310	1 40 810	1983	1 03 130	5 41 088	1 13 920	7 58 138
1955	26 800	1 64 000	24 050	2 14 850	1984	1 23 279	5 35 029	1 19 000	7 77 308
1956	44 100	1 79 600	26 780	2 50 480	1985	1 21 150	5 58 860	1 29 500	8 09 510
1957	41 500	1 94 400	29 520	2 65 420	1986	1 19 061	5 83 812	1 27 449	8 30 322
1958	48 800	2 19 000	32 270	3 00 070	1987	1 27 914	5 99 339	1 41 747	8 69 000
1959	66 200	2 59 000	34 910	3 60 110	1988	1 24 736	6 05 980	1 54 317	8 85 033
1960	90 500	3 45 000	37 660	4 73 160	1989	1 42 757	6 47 265	1 64 917	9 54 939
1961	88 900	3 44 900	40 320	4 74 120	1990	1 25 915	6 53 236	1 62 076	9 41 227
1962	79 550	4 22 390	43 040	5 44 980	1991	1 36 822	6 94 248	1 68 104	9 99 174
1963	90 500	4 93 690	45 750	6 29 940	1992	1 38 154	7 29 953	1 72 899	10 41 006
1964	90 000	5 09 970	48 540	6 48 510	1993	1 46 839	7 85 304	1 88 061	11 20 204
1965	92 300	5 32 960	51 330	6 76 590	1994	79 587	9 46 322	3 44 084	13 69 993
1966	97 300	5 30 740	54 130	6 82 170	1995	94 689	9 90 250	3 89 069	14 74 008
1967	89 500	5 66 110	56 850	7 12 460	1996	1 64 936	10 58 708	3 08 288	15 31 932
1968	78 400	5 73 870	59 580	7 11 850	1997	1 77 589	10 98 736	3 32 378	16 08 703
1969	88 300	6 15 010	62 440	7 65 750	1998	1 38 800	11 55 154	3 50 920	16 44 874
1970	86 100	4 66 550	65 350	6 18 000	1999	1 69 107	12 17 193	4 11 968	17 98 268
1971	90 500	5 29 440	68 360	6 88 300	2000	2 10 000	14 13 312	5 13 517	21 36 829
1972	98 600	6 08 670	71 230	7 78 500	2001	2 43 583	14 81 175	6 08 098	23 32 856
1973	1 05 400	6 34 650	74 250	8 14 300	2002	2 26 958	15 75 640	7 28 041	25 30 639
1974	1 00 500	3 95 080	77 220	5 72 800	2003	2 08 872	16 47 233	9 67 502	28 23 607
1975	95 770	3 70 640	80 390	5 46 800	2004	1 46 885	17 33 434	12 28 617	31 08 936
1976	1 01 120	4 26 100	83 580	6 10 800	2005	1 42 176	17 91 100	14 67 300	34 00 576
1977	93 300	4 08 480	87 020	5 88 800	2006	1 59 925	18 16 100	16 87 727	36 63 752
1978	95 500	3 97 740	90 760	5 84 000	***CAGR (%)***	***3.81***	***4.70***	***7.42***	***5.11***

Source: FAO Fisheries and Aquaculture Department, Fisheries Information, Data and Statistics Unit. FISHSTAT Plus: Universal software for fisheries statistical time series. Version 2.3.2000

one of Asia's most open economies: two-way trade is around 160 percent of GDP, more than twice the ratio for China and over four times India's. Some salient features of Vietnam are given in the box below.

Population	8 61 16 559 (July 2008 est.)
Literacy (15 years and above)	90.3%
GDP (Purchasing power parity)	$221.4 billion (2007 est.)
Worldwide Quality-of-life Index, 2005	61 out of 111
Human Development Index	109 out of 177
Global Competitiveness Report	77 out of 125

The fisheries sector is a significant contributor to the economy of Vietnam. Promoted by the Government with the aim of eliminating hunger, reducing poverty and increasing people's income, the Vietnamese fisheries have recorded remarkable growth in recent years. It has registered about 6 percent cumulative annual growth rate (CAGR) during the period 1950-2006 **(Table 1)**, contributing about 4 percent of GDP. With over 10 percent of the total export earnings, fisheries remains the third most important export-oriented sector, after textiles-garments and the crude oil industry, and ahead of agricultural products such as rice and rubber. Fisheries provides majority of the animal protein for the country. The per capita consumption of fish was 19.4 kg in 2003. More than four million people are directly employed in the sector; nearly 10 percent of the population derives its main income from fisheries. However, most fishers and aqua farmers are small-scale producers. About 77 percent of households conducting aquaculture have under 0.1 ha of pond area and another 7 percent from 0.1-0.2 ha.

The fisheries sector in Vietnam comprises three main sub-sectors; the marine, the inland and the aquaculture sub-sectors. The recreational fisheries sector is still not developed except from the production of ornamental fish. Marine fisheries are the biggest contributor to the fisheries production, followed by aquaculture. However, the composition dynamics **(Figure 1)** shows that since 1990s, aquaculture is rapidly increasing while marine fisheries is slowing down and inland fishery is staggering **(Table 2** - see page 14**)**.

Figure 1: Composition dynamics of total fisheries production in Vietnam, 1950-2006

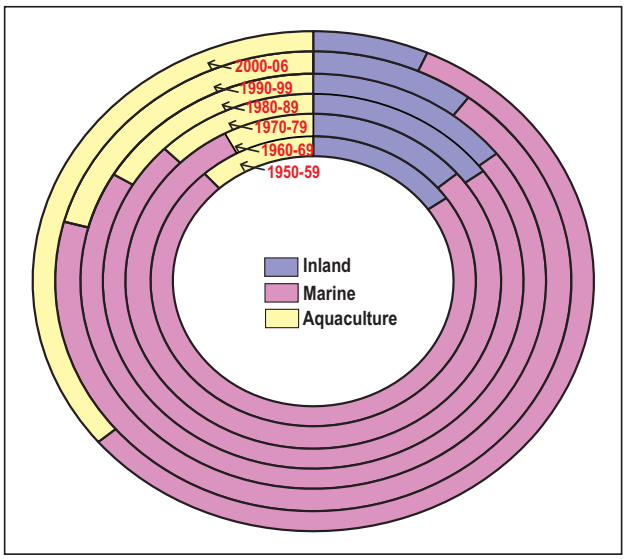


Table 2: Composition dynamics of total fishery production in Vietnam, 1950-2006

Period	Contribution (%)		
	Inland	Marine	Aquaculture
1950-59	15.26	73.08	11.66
1960-69	14.01	78.09	7.91
1970-79	15.06	72.56	12.38
1980-89	14.38	69.24	16.39
1990-99	10.14	68.95	20.90
2000-06	6.69	57.30	36.01

Computed from FAO Fisheries and Aquaculture Department, Fisheries Information, Data and Statistics Unit. FISHSTAT Plus: Universal software for fisheries statistical time series. Version 2.3.2000

Table 3: The result of the evaluation of Vietnam marine fish stocks and fishing capacity

Sea area	Kind of fish	Depth	Fish stock		Fishing capacity		% in the entire sea area of Vietnam
			Ton	%	Ton	%	
The Tonkin Gulf	Small pelagic fish		390 000	57.3	156 000	57.3	16.3
	Demersal fish	< 50m	39 200	5.7	15 700	5.7	
		> 50m	252 000	37	100 800	37	
	Total		681 200		272 500		
The Central region	Small pelagic fish		500 000	82.5	200 000	82.5	14.5
	Demersal fish	< 50m	18 500	3.0	7 400	3.0	
		> 50m	87 900	14.5	35 200	14.5	
	Total		606 400		242 600		
The South-eastern region	Small pelagic fish		524 000	25.2	209 600	25.2	49.7
	Demersal fish	< 50m	349 200	16.8	139 800	16.8	
		> 50m	1 202 700	58.0	481 100	58.0	
	Total		2 075 900		830 400		
The South-western region	Small pelagic fish		316 000	62.0	126 000	62.0	12.1
	Demersal fish	< 50m	190 700	38.0	76 300	38.0	
	Total		506 700		202 300		
Floating knoll	Small pelagic fish		10 000	100	2 500	100	0.2
The whole sea area	Deep sea pelagic fish (*)		(300 000)		(120 000)		7.2
Total	Small pelagic fish		1 740 000		694 100		
	Demersal fish		2 140 000		855 900		
	Deep sea pelagic fish (*)		(300 000)		(1 20 000)		
	Total		4 180 000		17 00 000		100

(*) Data presumed according to total catch of the countries in this sea area
Source : Research Institute of Marine Products (RIMP), Vietnam
Compiler : Fisheries Information Centre (FICen)

With a sea area[1] of 1 million km^2 (Exclusive Economic Zone or EEZ)Vietnam is enriched with many water bodies. The country's coastline stretches for more than 3 260 km. There are about 2 860 small and big rivers and about 20 000 ha of natural lakes. Vietnam also has a number of medium and small-sized reservoirs, covering an area of over 1 80 000 ha. To meet the increasing demands of irrigation, hydroelectric power and flood control, more reservoirs are being built.

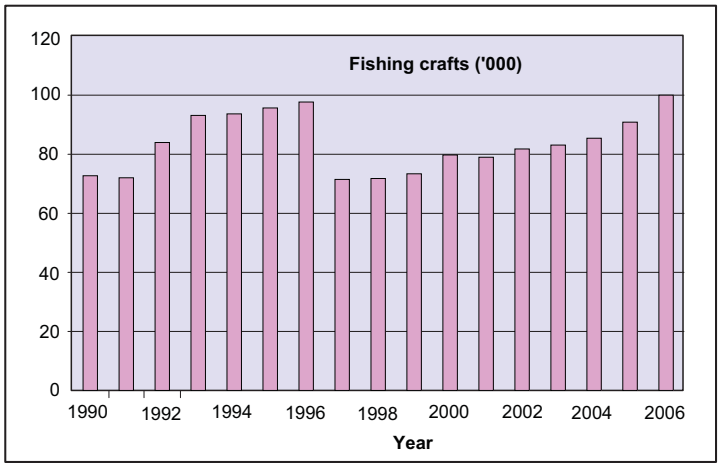
Marine sub-sector

There are more than 2 000 fish species in the marine waters of Vietnam, of which about 130 species having economic value. According to the latest evaluation, the marine fish stock in the country's EEZ is 4.2 million tonnes, in which the annual allowable catch is estimated at 1.7 million tonnes, including 8 50 000 tonnes of demersal fish, 7 00 000 tonnes of small pelagic fish and 1 20 000 tonnes of oceanographic pelagic fish. Besides marine fin fishes, the resources comprise more than 1 600 species of crustaceans with an annual allowable catch of 50 000-60 000 tonnes, in which marine shrimps, lobsters, slipper lobsters, crabs and mud crabs are high valued species; about 2 500 species of molluscs, of these squids and octopus have significantly economic value (the annual allowable catch is 60 000-70 000 tonnes). Each year a volume of 45 000-50 000 tonnes of high valued seaweed such as *Gracilaria verrucosa*, *Sargassum* can be exploited **(Table 3)**.

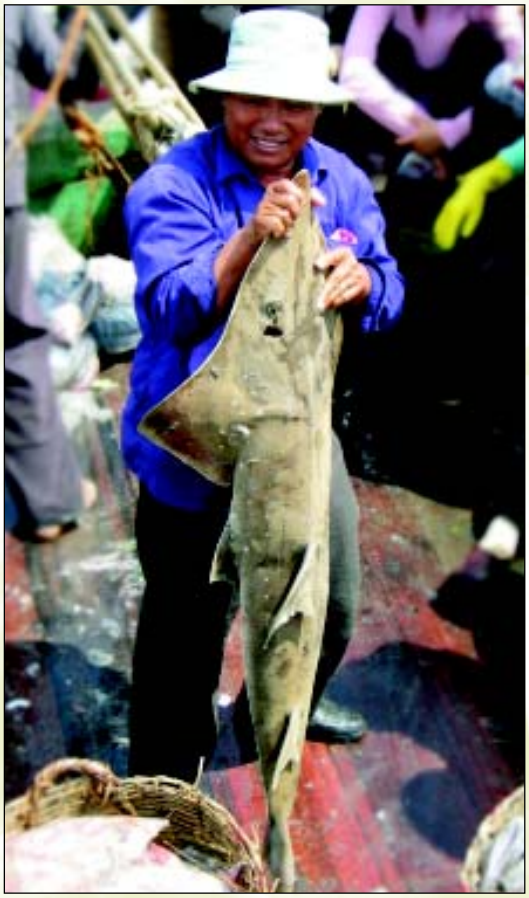
Vietnam has four main fishing areas: Gulf of Tonkin, shared with China; Central Vietnam; South-eastern Vietnam; and South-western Vietnam (part of Gulf of Thailand), shared with Cambodia and Thailand. Marine catches are highest in Central and Southeast Vietnam. The Mekong river delta provides over 75 percent of the total marine landings and therefore most of the fishing industry is concentrated in the southern provinces, from Khanh Hoa to Ca Mau **(Table 4** - see page 19**)**.

In recent years, the number of fishing boats has increased considerably in Vietnam. It has increased from 44 000 in 1991 to 90 880 in 2005 and is assumed to cross 1 00 000 by now **(Figure 2)**. There is no control over entry of fishing boats and with the

Figure 2: Growth of fishing crafts in Vietnam



[1] *The total EEZ is in general assumed to be approximately 1 000 000 km^2, but cannot be measured precisely due to boundary disputes with the neighboring countries. The Vietnamese Authorities use the following definition: "Vietnamese sea areas" are the sea areas under the sovereignity jurisdiction of the Socialist Republic of Vietnam according to the 5 December 1977 Declaration of the Government of the Socialist Republic of Vietnam and the 1982 United Nations Convention on the Law of the Sea ratified on 23 June 1994 by the National Assembly of the Socialist Republic of Vietnam, including the internal waters, the territorial sea, the contiguous zone, the exclusive economic zone and the continental shelf (mentioned in the Vietnam Association of Seafood Exporters and Producers (VASEP) website: http://www.vasep.com.vn/vasep/eMarketReport.*



Marine fishing activities in Ba Ria Vung Tau Province (top and facing page)

An hour with Mr Pham Van Tan, Captain of 2885 Nam Dinh Fishing Vessel, Song Lam Fishing Port, Hai Trieu Group, Nghi Loc Precinct, Cua Lo Town, Nghe An Province.

Mr Pham Van Tan followed his father's footsteps and joined full time fishing in 1993. He and his five crew members own a wooden gill-netter of 18.5 meter overall length. The boat was constructed two years ago in the yard of a ship building cooperative in Cua Lo Town. *'We ourselves raised 1.2 billion VND from the Bank to finance the boat', said* Mr Tang.

Mr Tan and his crew usually fish at a distance of 50-70 miles from the shore. Each fishing trip lasts for about 10 days. If the sea is calm, the boat returns immediately to the sea for fishing. The boat has a 280 hp Yamaha engine, a GPS, a high frequency radio set and navigation charts. The boat is registered (No 2885) with the Government and is well maintained.

In a calm year, Mr Tan goes out for fishing for about 270 days/ year. Fishing is for both pelagic and demersal fin fishes and mainly targeted for exports. Normally, they return with 1.5-2.0 tonnes of fish per trip and the catch fetches about VND 70 000/ kg. The annual average volume of catch is about 50 tonnes. The annual fuel (diesel) consumption of the boat is estimated at 30 -40 000 litres and the cost towards food and other supplies is around 100 million VND per annum. Diesel and ice is provided at the Song Lam Fishing Port, which has an ice plant.

Mr Tan said that he has not received any subsidy from the Government in the past. However, from 2008 onwards, the Government is providing subsidy on diesel to partially offset the rising cost of fuel price. This subsidy is available @ 30 million VND per year for engines of 90 hp and above; @ 24 million VND/ annum for engines between 40 – 90 hp; and @ 20 million VND per year for engines between 20- 40 hp. This subsidy is expected to be available up to 2010. The normal price of diesel in Vietnam is 14-16 000 VND per litre (about 0.87 to one US$). Mr Tan feels that the diesel subsidy for different engines sizes is not proportionate. 'An engine of 40-90 hp will consume half to 1/3rd of the 90 hp category. Less than 40 hp will consume about 1/3rd. My vessel has an engine of 280 hp, but the fuel subsidy available to my vessel is marginally higher than that available to fishing vessels with engines of much lesser engine power. This subsidy pattern of the government goes against their policy of promoting offshore fisheries', said Mr Tan.

Mr Tan's family comprises his wife and four children; aged 16 (Son), 14 (Daughter), 11 (Son), 4 (Daughter). He owns a house, motor bike, TV, fridge. The elder three children are in school; the wife looks after the family and also makes/ mends fishing nets. He does not have any agriculture land. Mr Tan likes his job but would like his children to study and take up some other profession. 'My cherished dream is to see my children through the school and university. However, if they (sons) do not study, I will allow them to follow my profession', said Mr Tan.

Table 4: Main fishing grounds and species caught in Vietnam

Fishing grounds	Depth (m)	Main species
Bach Long Vi	50	Long spine, sea bream, round scad, lizard fish, threadfin bream
South Long Chau	25-30	Sardinella gibbosa
North Hon Me	22-28	Anchovy, Sardinella gibbosa
Tonkin Gulf Mouth	30-47	Round scad, sardinella, rainbow sardine
Hon Gio		Threadfin, threadfin bream, toothless travally, grey bream, lizard fish
E-N Da Nang	100-300	lizard fish, bigeye, threadfin bream, yellow bream
E-S Quy Nhon	50-200	Bigeye tuna, lizardfish, threadfin bream, croaker
E Phan Thiet	<50	Lizardfish, bigeye, scad
S Phu Quy (Cu Lao Thu)	50-200	Brushtooth lizardfish, bigeye, threadfin
Con Son	25-40	Round scad, snappers, yellow-stripe trevally, threadfin bream, threadfin lizardfish
Mekong Mouth	10-22	Threadfin, sardinella, toothless trevally, croaker, snappers
Mekong	10-15	yellow-stripe trevally, snappers, thrapon, ponyfish, threadfin bream
SW Phu Quoc	10-30	yellow-stripe trevally, snappers, thrapon, ponyfish, threadfin bream

Source: World Bank - Fisheries Sector Report Vietnam, 2004.

increasing fisher population, the number of small boats is also increasing at about 2 300 boats per year. Simultaneously, the average power of the vessels has also increased by 12 percent/ year to reach 48 horsepower (hp) by 2002. The engine power of southern vessels averaged over 90hp, compared to 30hp for the rest of the country. Of the mechanized vessels, almost 7 000 are classed as 'offshore' with engines of over 90hp.

The fishing gear in Vietnam are highly diverse and could be divided into the following types:

Trawl	**Gill Net**	**Cast Net**
Beam trawl	Drift gill net	Cast net
Bottom otter trawl	Bottom gill net	Stick-held falling net
Bottom otter trawl with booms	Trammel net	
Bottom pair trawls	Drift gill net with bag	**Scoop Net**
		Man-push net
Surrounding Net	**Lift net**	Powered-push net
Anchovy purse seine	Portable lift net	
Luring purse seine	Raft lift net	**Miscellaneous**
Purse seine	Lift net	Dredge
	Stick-held dip net	Spear
Seine Net		Tide net
Beach seine	**Trap**	Gaff hook
Boat seine	Set net	
Hook and Line	Bamboo stake trap	
Hand line	Stow net	
Long line	Trap	

A study conducted by SEAFDEC during 1997 shows that trawlers contribute the major share of the catch followed by purse seines, gill nets and lift nets (**Table 5**).

Table 5: Catch by type of fishing gear in Vietnam in 1997[2]

Fishing regions	Catch (%)						
	Trawl	Purse seine	Gill net	Hook and line	Lift net	Fixed net	Others
Northern region	37.1	6.7	25.4	6.5	19.3	1.7	3.2
Central region	18	24	20	13.8	21.1	0.5	2.6
Southern region	60	22.1	6.6	5.8	-	4.7	0.8
Total	**43.1**	**20.6**	**13.6**	**8.5**	**9.6**	**2.9**	**1.7**

Source: Training Department, SEAFDEC

Trawls have been used in Vietnam for a long time. In the early years, fishermen used two sailing boats to drag one trawl. The nets were made of cotton and the buoys were wooden with a rectangular or hydrodynamic shape. The fishing grounds were mainly near-shore with depths of less than 20 m. Until 1957, with the technical assistance of the Democratic Republic of Germany, four trawlers of 90 hp were used with two-seam trawl nets in the Gulf of Tonkin.

Presently, the trawl fishery has over 20 000 units and is largely concentrated in the Northern and Southern Provinces of Vietnam due to favourable natural conditions in the fishing grounds. Most trawls used in Vietnam are of two-seam types. However, in recent years, fishermen in the Southern provinces have used some models of four-seam trawl nets with a high opening. Trawl fishing in Vietnam can be classified into four types: Beam trawl, Bottom otter board trawl, Bottom otter board trawl with booms and Bottom pair trawls.

Purse seine is one of the most important fishing gear in the marine fishing sector of Vietnam and contributes about 21 percent of the total catch. The purse seines also have high potential for operation in offshore areas. With the appearance of new techniques and Fish Aggregating Devices including the use of lights and fish shelters for luring fish and nylon netting material, purse seine fishery has developed rapidly. Most purse-seiners in the Northern and Central Provinces are of small size ranging 13-16 m in length and with engines of less than 90 hp. In the Southern Provinces, the sizes of purse seiners are bigger and there are many of 16-23 m in length with engines ranging from 90-450 hp.

The marine fisheries of Vietnam are small-scale, operating mainly in coastal areas. Due to over accumulation of fishing effort in the coastal waters, some resources are showing signs of overexploitation. To stem this decline of the resources, the Government of Vietnam is promoting offshore fishing and shifting some groups of fishers to other fields of business activities such as aquaculture, trading, tourism services, etc. The monitoring, control and surveillance system is also weak and the marine waters are in open access regime. As a result, foreign boats often penetrate into Vietnamese waters and fish illegally. They fish off shore during the day and near shore at night time. The quantity of marine catches taken by foreign fishing boats is estimated of about 1 00 000 tonnes/ year.

[2] *http://map.seafdec.org/Monograph_project/index_vn.php*

The overcapacity in the coastal waters has led to decline in the CPUE, which has declined from 1.11 tonne/ hp/ year in 1985 to 0.34 tonne / hp/ year in 2005[3] . While at the same time fuel price has increased many times, implying loss for fishers. In May 2008, the Government[4] announced a subsidy of about US$3 500 a year for fishers buying a new boat with an engine of 90 hp or more. However, there is concern that it may accelerate the resource depletion in the country.

Trash Fish

A number of the fishing gear used in Vietnam result in high catches of trash fish. Trawlers (single and pair) typically land between 50 and 70 percent of non-table species of fish, which are used (i) for direct feeding to fish or livestock; (ii) in the manufacture of fish sauce (nuoc mam) or fish meal or (iii) for conversion into fish sauce. Trash fish landings are estimated at 33 percent of total marine fish landings. Southeast region accounts for two thirds of the trash fish production. Southern fisheries also record the highest proportion of trash fish (averaging around 60% of the catch), compared to 5 percent in central, and 14 percent in northern regions. Quality is often poor, since salt is usually used for preservation as opposed to ice.

There are over 100 species of marine 'trash fish' that are used as aquaculture feed or aquaculture feed ingredient in Vietnam. Trash fish composition usually includes fishes (highest %), small molluscs, crustaceans and echinoids. The composition also varies on the type of gear used but most is from trawling. Therefore, trash fish in Vietnam is commonly known as 'trawling fish'. The composition also varies by area or region. The major trash fish species by area are anchovy (*Stolephorus spp*.) in the centre and southwest, lizard fish (*Saurida spp.)* in the north, centre and southeast and pony fish (*Leistognathus spp*.) in the centre and southwest.

The relative abundance of trash fish is also highly seasonal. Trash fish, therefore, comprises mainly demersal species but pelagic may be used when fish landings exceed local marketing or fish processing capacity. Spoiled higher value species may also be used as trash fish. In general there is no special fishery for trash fish. Trash fish is therefore a by-product of fishing for higher value fish, crustaceans and molluscs. The single exception perhaps is the fishing fleet at Cat Lo near Vung Tau in southeast Vietnam, where trash fish is the main target as it is more economical fishing trash fishes than larger species.

Inland sub sector

The total area of natural inland water bodies (lakes and rivers) is estimated to be about 4 200 km^2. In addition, there are 6 000 km^2 of ponds and seasonal flooded areas. The total area is also increasing due to construction of new dams and reservoirs.

During the 1970s there were more than 70 fishing cooperatives with annual production of several thousand tonnes. Annual fish production from inland waters reached a peak at 2 44 000 tonnes in 2001, later declining to 209 000 tonnes in 2003. Possibly, overexploitation and recurrent droughts led to a reduction in the resource. As a result, many fishers' cooperatives are converting to other activities.

However, inland fisheries (rivers, lakes, reservoirs and rice field) remain important for rural population in the inland areas. Inland capture fishery landings include

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[3] *Manh, Dr Son Dao, Research Institute for Marine Fisheries, Status of marine fisheries resources and capture fisheries in Vietnam, prfisheries.alaskapacific.edu/Conference/Docs/Day1/A05-Vietnam-Vihn.ppt (accessed September 2, 2008).*

[4] *Voice of America (08 May, 2008), "Overfished Vietnam Subsidizes More Fishing Boats" http://www.voanews.com/english/archive/2008-05/2008-05-08-voa15.cfm?CFID=34193847&CFTOKEN=45819200 (accessed on 2nd September, 2008).*

Table 6: Improvement in aquaculture scenario in Vietnam

Years	Production (tonne)	Area (ha)	Productivity (tonne/ ha)
1990	3 10 000	4 91 723	0.63
1991	3 47 910	4 89 833	0.71
1992	3 51 260	5 77 538	0.61
1993	3 68 604	6 00 000	0.61
1994	3 33 022	5 76 000	0.58
1995	4 15 280	5 81 000	0.71
1996	4 11 000	5 85 000	0.70
1997	4 81 000	6 00 000	0.80
1998	5 37 870	6 26 330	0.86
1999	6 14 510	6 30 000	0.98
2000	7 23 110	6 52 000	1.11
2001	8 79 100	8 87 500	0.99
2002	9 76 100	9 55 000	1.02
2003	11 10 138	9 02 229	1.23
2004	11 50 100	9 02 900	1.27
2005	14 37 400	9 59 900	1.50
2006	16 94 271	10 50 000	1.61
2007	20 80 000	10 50 000	1.98

Table 7: Major aquaculture species in Vietnam

Scientific name	English name	Vietnamese name	Production in 2002 (Tonne)	Target production (tonne by 2010)
Pangasius bocourti	Basa catfish	Ca Ba sa	+++	++++
Pangasius hypophthalmus	Tra catfish	Ca Tra	+++++	+++++
Piaractus brachypomus	Pirapitinga	Ca Chim trang	+	++
Oreochromis spp.	Tilapia	Ca Ro phi	++	++++
Cyprinus carpio	Common carp	Ca Chep	++	++++
Clarias spp.	Walking catfish	Ca Tre	++	++++
Macrobrachium rosenbergii	Giant freshwater prawn	Tom cang xanh	++	++++
Penaeidae	Penaeid shrimp	Tom he	+++++	+++++
Panulirus ornatus	Spiny lobster	Tom hum	++	+++
Scylla serrata	Mud crab	Cua Xanh	++	+++
Epinephelus spp.	Grouper	Ca Mu	++	++++
Rachyentron canadum	Cobia	Ca Bop/Gio	+	+++
Lutjanus spp.	Snapper	Ca Hong	+	+++
Pacrosomus major	Red sea bream	Ca Trap	+	+++
Lutjanus spp.	Asian seabass, barramundi	Ca Vuoc / Chem	+	+++
Chanos chanos	Milk fish	Ca Mang bien	+	+++

+ < 1 000 t; ++ 1 000-10 000 t; +++ 10 000-50 000 t; ++++ 50 000-100 000 t; +++++ > 100 000 t
Source: FAO – Fishery and Aquaculture Country Profile of Vietnam

culture-based-capture, through stocking of lakes, reservoirs and other inland waters, mainly with carp and tilapia. The rivers in Vietnam are generally quite productive. The Mekong River for example provides more than 30 000 tonnes of fish annually, landed by around 48 000 fishers in 250 communes (MOFI Master Plan). However, the Red River delta in the north, which was once highly productive, is now almost devoid of fish, due to extensive flood control and the closure of flood plain fish breeding and nursery areas.

Aquaculture sub-sector

The aquaculture sector in Vietnam began with small-scale extensive culture systems such as rice-cum-fish, livestock-cum-fish and earthen ponds in the early 1960s. The rapid growth in the last two decades has been a direct result of diversification in the farming practices and adapting to the production of exportable species at increased levels of intensification.

In Vietnam, the diversification in farming practices is based on the geographical and climatic conditions. The northern areas are dominated by freshwater fish ponds, rice-cum-fish and marine cage culture; the central regions concentrate on intensive culture of tiger prawn and the marine cage culture of fin fish or lobsters and the southern parts have the most diversified farming activities that include ponds, fence and cage culture of catfish as well as several indigenous species. This region has also witnessed various intensification levels of giant tiger prawn culture and integrated farming practices such as rice-cum-fish, rice-cum-prawn and mangrove-cum-aquaculture.

The aquaculture sector can be divided into marine, brackish and freshwater aquaculture. The total aquaculture area in 2003 was 9 02 229 ha; 5 75 137 ha (63.7%) for marine and brackish waters and 3 27 092 hectares (36.3%) for freshwater aquaculture. The Government's programme for development of aquaculture in the period 1999 - 2010 (Decision No 224/1999/QD-TTg dated 08/12/1999) was initiated with the objectives of providing food security and creating raw material resources for exports.

Based on the initiatives of the Government and the efforts of the farmers, the volume of aquaculture has increased significantly from 1 27 000 tonnes in 1986 to over 2.1 million tonnes in 2007. This increase in production is achieved both from increase in area under culture and productivity. The area under culture has now reached about one million ha, which is nearly double the area under culture in 1990. The additional areas were sourced from conversion of flooded and low-yielding areas to aquaculture. Simultaneously, with improved farming practices and policy support, the yield has increased from 0.63 tonne per ha in 1990 to about 1.61-1.98 tonne per ha in 2006-07 – an increase of 250-300 percent **(Table 6)**.

Vietnam's aquaculture utilizes a wide range of species that provide significant potential for further aquaculture development. In freshwater areas, the catfishes (*Pangasius hypophthalmus* and *Pangasius bocourti*), which are farmed in the Mekong River delta have the highest production. There are several other popular cultured fish species that contribute significantly to the total freshwater fish production and include the silver carp (*Hypophthalmichthys molitrix*), grass carp (*Ctenopharyngodon idella*), common carp (*Cyprinus carpio*), bighead carp (*Aristichthys nobilis*) and the major Indian carps, including catla (*Catla catla*), rohu (*Labeo rohita*) and mrigal (*Cirrhinus mrigala*). More recently, mono-sex tilapia (*Oreochromis niloticus*) has also been introduced into inland and brackish water aquaculture. In addition, giant river prawn (*Macrobrachium rosenbergii*), climbing perch (*Anabas testudineus*) and the Indonesian snakehead (*Channa micropeltes)* are the most popular cultured species in the southern part of Vietnam.

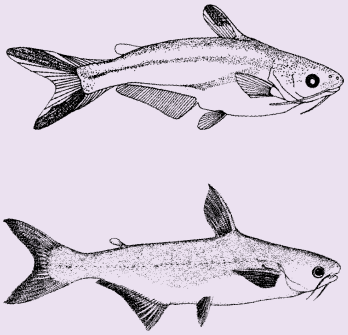
In mariculture, the most popular species consist of lobster (*Panulirus spp*.), grouper (*Epinephelus spp.)* and seaweed (*Gracilaria verrucosa*). These species dominate the central coastal areas of Vietnam. In brakishwaters, the black tiger shrimp (*Penaeus monodon*), mud crab (*Scylla spp*.) and the bivalves (*Meretrix spp.* and *Anadara spp.)* are the most popular cultured species, particularly in the south of Vietnam **(Table 7)**.

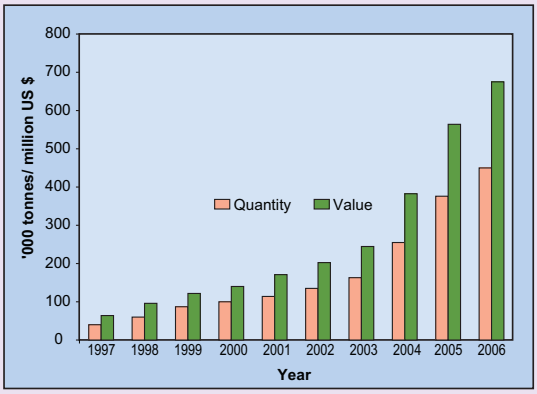
Catfish farming in Vietnam

Wild caught river catfish (*Pangasianodon hypophthalmus*) from the Mekong River has been an extremely popular food fish in Vietnam. Culture of river catfish based on seed collected from the rivers has been in vogue in Vietnam for centuries. In the early 1980s, induced spawning was successfully attempted and later in the 1990s nursery techniques were also perfected resulting in a boom in catfish production in Vietnam. In the late 1990s the production increased and Vietnamese catfish entered the international markets.

In the USA, catfish is ranked the fifth most popular seafood behind shrimp, tuna, salmon and pollock. In the European markets, Vietnamese *tra* and *basa* catfish are now in great demand. In Asia and Africa, catfish has traditionally been a popular fish for ages and in recent years there has been a new wave of frozen catfish fillet from Vietnam that has found its way into supermarket chains and seafood restaurants in major cities in Asia.

Driven by strong demand, production of catfish has been increasing rapidly, transforming from traditional small farms to industrial scale operations in many countries. According to the Food and Agriculture Organisation (FAO) statistics (FISHSTAT), the production of all 'catfish' species increased from only 440 000 tonne in 1994 to almost 1.2 million tonne ten years later. However, these figures do not include the production of *tra* and *basa* catfish from Vietnam. Therefore, with the current production of *tra* and *basa* in Vietnam at around 375 000 tonne per year, it is estimated that the global catfish production could be around 1.5 – 1.6 million tonne. Vietnamese *tra* and *basa* catfish and channel catfish are the two dominant species traded in the international market while other catfish such as *Clarias* spp. are mainly marketed locally in Asia and Africa. While Vietnamese *tra* and *basa* catfish are the main driving force behind the globalization of catfish, China has emerged as the main producer and also exporter of channel catfish outside the US.





The catfish success story of Vietnam came into conflict with the producers in the USA. In 2000s, the catfish industry of Vietnam was accused of unhealthy farming practices, eco-labeling and anti-dumping measures. However, the major crisis of the industry has come in 2008 when excess production has driven down the price below production cost. To bail out the farmers and the processors, the Government has lent US$ 69 million to the processors. As a result of this effort, the prices of catfish have risen marginally from VND 13 -14 000 to VND 15 - 16 000. However, the processors still cannot secure enough material for production, according to Viet Nam Association of Seafood Exporters and Producers (VASEP). The vision still looks somber late this year or even next year as the area under catfish cultivation is dwindling because growers are no longer confident in the bond with processors, fearing the high-yield-low-price circle will repeat. However, this boom and bust may help to strengthen the sector further by penetration of new markets and stabilization and diversification of production.

A number of new species with good potential have also been introduced into the farming systems to increase the number of species under cultivation. These new species include cobia (*Rachycentron canadum*), abalone (*Haliotis spp*.), maculated ivory whelk (*Babylonia areolata*), silverlip pearl oyster (*Pinctada maxima spp.),* whiteleg shrimp (*Penaeus vannamei*) and barramundi (giant sea perch) (*Lates calcarifer*).

Marine aquaculture

In comparison with other countries in the region, mariculture is yet to be developed in Vietnam. However, fattening of young wild fish (mostly caught by hook and line) in cages is becoming more and more popular. One of the difficulties of mariculture is the availability of quality seed through controlled breeding. Unlike fresh water species, the artificial reproduction techniques for sea fish are still not well developed. Methods of marine aquaculture include cage farming of groupers and cobia, float-raising of lobsters, oyster raising for pearl, marine fish raising in ponds and mollusc raising. The number of cages has increased from only 600 in 1995 to 40 159 in 2003, excluding cages for oyster raising.

Brackish aquaculture

Vietnam has huge potential of coastal aquaculture with shrimp culture being dominant. The brackish water aquaculture practices can be divided into traditional extensive, improved extensive, semi-intensive and intensive culture. Improved extensive farming and semi-intensive farming are the most common methods adopted by the farmers. Productivity from extensive and semi-intensive farming practices is on an average 300 kg/ha and 1 500-2 000 kg/ha respectively. Presently, the area used for intensive and semi-intensive farming accounts for 10 percent of the total area under aquaculture. The total production of brackish water shrimp in 2003 was more than 200 000 tonnes. The enormous increase under shrimp farming has had some negative environmental impacts, such as mangrove destruction and silting of the inland areas.

Freshwater aquaculture

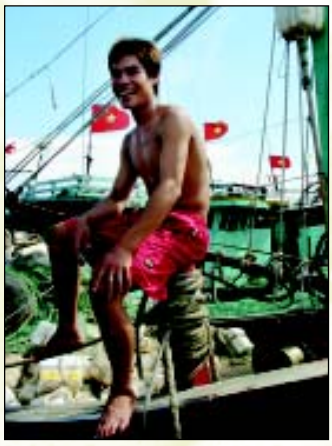
Freshwater production environment includes ponds, ditches, cages, net enclosures and pens in reservoirs, lakes, rivers and channels and paddy fields. In the North, poly culture in ponds is the most important farming system with Chinese carps (silver carp, grass carp and bighead) as the important farmed species. The main freshwater aquaculture production takes place in the southern Provinces, especially cage culture in the Mekong and Bassac rivers. In recent years, red tilapia is cultured in ponds by using intensive monoculture system, while giant freshwater prawn is cultured in ponds and ditches using semi-intensive system. In addition, an integrated VAC system (V: garden, A: fish pond, C: livestock) is also common in the country.

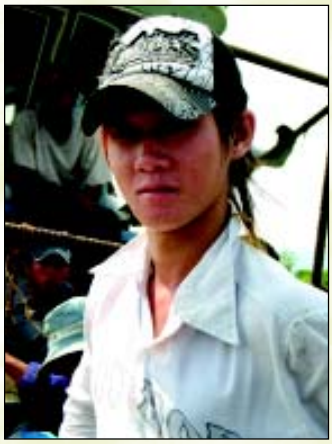
With the increasing thrust by the Government on raising catfish in the Mekong River delta, the production is likely to further accelerate in the coming years. Farmers are provided with free extension services and state owned hatcheries have been established to meet the growing demand of fingerlings. The objectives of this programme are to develop aquaculture to assure food security, increase export earnings and create jobs and income for the growing population.

2.1.2 Post Harvest and Marketing

Fish utilization

According to Government sources, the percentage use of marine finfish catch is as follows: 20 percent export, 20 percent fresh human consumption, 25 percent animal





feed and fish meal (for livestock and aquaculture) and 25 percent fish sauce, though this does not completely reflect in the production figures. In the past, all the processed lines were imported. As a result, the price of the processed seafoods was too high for domestic consumption. However, the fisheries sector has recently developed cold chain for domestic processing and this constraint has been overcome. Besides, the increasing income has also lead to more consumption demand.

The number of export oriented processing plants is 332 with an annual input requirement of 5 00 000 tonnes/ year. To deal with new challenges and competition, Vietnamese export processing establishments have continuously improved their management and working conditions and have heavily invested into modern machines and equipment in order to achieve automation. Advanced technologies, including post-harvest preservation, surimi production, transportation of fresh fish, individual quick freezing (IQF), etc. are being increasingly used. As of now, 273 processing units meet the food safety and hygienic criteria of Vietnam; 248 units meet the standard criterions for USA, 153 fisheries exporting enterprises are recognized in the list of EU markets; 255 units are approved to enter Switzerland and Canada and 222 units to enter Korea. Apart from the public processing units, the private processing enterprises are also coming up strongly and some of them export over 100 million USD per year worth of seafood products.

A study conducted by the College of Aquaculture and Fisheries, Can Tho University, Vietnam from March 2002 to May 2004 throws some light on marketing information in Ca Mau Province. The study results show that marketing network of aquatic products has been established in Ca Mau Province. About 56 percent of the total aquatic production was supplied to market from fishing activities and other 44 percent was from aquaculture. A half and 25 percent of the total products were supplied directly to fish processing companies and wholesalers respectively. The remaining was supplied directly to domestic consumers. About 76.4 percent of the production from processing companies was directly exported while the wholesalers and middlemen sold 50 percent of their production to domestic consumers. For any further development of the fishery sector in the province, three most important things need to be improved. They are (i) better organization and management of the markets, (ii) more appropriate planning in both fishing and aquaculture, and (iii) more investment given to the preservation, processing and marketing of aquatic products.

Domestic markets

The marketing of fish, shrimp and other capture and culture products in Vietnam is complex. There are numerous species, product forms, marketing channels and markets. Products may be marketed live by farmers or sold to middlemen who collect product and sell to processing plants (or in the case of shrimp fry or grouper fingerlings, to other producers). Marine catches are normally sold to agents at the port or jetty. Fishers often develop long-term relationships with traders or wholesalers who provide them with credit for fuel, ice and other supplies and can provide finance for off-season needs or even assist with vessel purchase. Vessels fishing offshore may resort to mid-sea transfer/ sale of catch to transport vessels or collector vessels run by their agents.

Where marine product processing plants are present, vessels may contract to supply them with product. Factories can seek product over a wide area. In the north, significant quantities of fish and other products are purchased by Chinese agents using collector vessels. Aquaculture products follow a similar path, though some producers contract directly with processing plants. Almost all processed aquaculture production (96%) is destined for export. Fish from aquaculture are often sold live in local or city markets.

Table 8: Trade dynamics of Vietnam fisheries

Year	Export		Import	
	Quantity (Tonnes)	Value ('000 US$)	Quantity (Tonnes)	Value ('000 US$)
1976	0	0	0	0
1977	0	0	0	0
1978	0	0	0	0
1979	4 149	15 500	0	0
1980	2 955	10 691	886	1 153
1981	5 327	19 770	0	0
1982	11 351	45 235	0	0
1983	11 878	45 060	0	0
1984	16 058	64 555	0	0
1985	22 427	73 989	0	0
1986	25 060	90 493	0	0
1987	28 496	140 883	0	0
1988	38 875	186 352	0	0
1989	31 264	125 289	0	0
1990	43 663	175 832	0	0
1991	66 780	278 888	0	0
1992	80 720	305 163	0	0
1993	94 825	368 235	1 600	620
1994	109 699	483 677	3 300	1 275
1995	83 726	512 937	6 239	3 579
1996	98 722	503 552	7 013	6 416
1997	211 095	763 257	9 358	11 840
1998	209 237	822 265	2 917	4 349
1999	237 754	942 361	17 487	16 963
2000	302 942	1 484 283	7 950	36 242
2001	512 601	1 823 102	42 098	60 145
2002	603 026	2 044 630	45 124	116 141
2003	513 260	2 203 499	80 124	151 622
2004	624 493	2 450 112	104 352	218 636
2005	667 761	2 765 365	164 063	276 576
2006	830 826	3 363 446	172 481	280 824

Computed from FAO Fisheries and Aquaculture Department, Fisheries Information, Data and Statistics Unit. FISHSTAT Plus: Universal software for fisheries statistical time series. Version 2.3.2000.

International markets

Seafood is the third major export product of Vietnam after textile-garments and crude oil. In 2004, Vietnam exported fisheries products to 80 different countries and territories. The main export markets for fishery products are USA (35%), Japan (26%), China/ Hong Kong (7%) and Europe (6%). The main export products are shrimp, fish, squid, cuttlefish & octopus and dried seafood products. Among export products, frozen shrimp is the highest earner, pulling 40 percent of the total revenue. In 2003, Vietnam exported to the USA 1 23 472 tonne of seafood, worth US$7 82 238 million, an increase of 25.1 percent in volume and 19.3 percent in value over 2002; to Japan 98 310 tonne, valued at US$ 528 902 million, growing by 2.1 percent in volume and 8.4 percent in value compared with 2002 (VASEP). In 2007, the export values reached over 3.75 billion USD.

Overall, since entering the export market in 1979, export of fisheries products from Vietnam has increased by 21.78 percent per year in physical term and by 22 percent in value term. The growth is more prominent since 1990s **(Table 8)**.

Frozen shrimp is still the country's major export earner, gleaning 46 percent of export value. Vietnam is now the second largest exporter of shrimp to the US, after Indonesia. Frozen fish now accounts for 19.6 percent of export value.

Vietnam does not import much fish, but the small quantities of imported product consist mainly of raw material for processing and re-export. Imports also play the role of cushioning seasonal variations in domestic aquaculture and capture fisheries.

Vietnam is now among the top ten countries in terms of volume of trade and its opportunities are increasing due to Vietnam's accession to WTO and international and regional fisheries organizations like the Food and Agriculture Organization of the United Nations (FAO), the Asia-Pacific Fisheries Commission (APFIC), Southeast Asian Fisheries Development Centre (SEAFDEC), Mekong River Commission (MRC), Network of Aquaculture Centers in Asia- Pacific (NACA) and Fisheries Information Organization (INFOFISH). However, the fisheries sector in Vietnam is facing a lot of challenges and difficulties such as the backward technology and facilities, low economic efficiency and environmental stagnation, etc.

2.1.3 Management and organization

Fisheries management in Vietnam may be viewed as a two-tier system, where part of the responsibility lies with the provincial authorities and part with the Ministry of Agriculture and Rural Development (MARD)[5]. The latter has taken increasing responsibility for overall protection and enforcement during the 1990s. Under the MARD are the provincial, district and village Fisheries Authorities within the People's Committee, which basically organize fisheries in their own jurisdiction.

The fisheries legal system has been built up during the past 35 years. Important developments in protection of fisheries resources and their living environment include: registration and issuance of documents related to fisheries; licensing (over 80% of the boats in marine fisheries); export-import of fish seed, fish feed, veterinary drugs, etc. and establishment of fisheries protection and inspection. The fishery resource protection and inspection organization has commenced its activities in the provinces and a new organization with fisheries inspection boats is now in force.

[5] *The Ministry of Fisheries was merged with the Ministry of Agriculture and Rural Development (MARD) in August 2007. MARD performs the function of state management in the domains of agriculture, forestry, salt-making, fisheries, irrigation and rural development throughout the country and performs the state management of public services in the domains falling within its management scope. Its domain was modified and enforced by the Government's Decree No. 178/2007/ ND-CP dated December 3, 2007, defining the functions, tasks, powers and organizational structures of ministries and ministerial-level agencies, as well as the specific tasks and powers. Source: http://asemconnectvietnam.gov.vn/Ministries/ MinistryDetail.aspx?id=21*

Management of aquaculture has led to regulations for seed resources, drugs and feed, general management of aquaculture to increase efficiency and safeguard the environment, and epidemiological inspection of aquatic animals and animal products.

Apart from the Decrees issued by the Government, fisheries management is directly influenced by the tax system (economic incentives as well as disincentives have been introduced as part of fisheries management) under the jurisdiction of the Minister of Finance and the import/ export regulations issued by the Minister of Trade, as well as the regulations issued by the Minister of Technology and Environment.

In order to reach the target of increasing offshore fishery production, a programme of investing in offshore fishing vessels has been implemented since 1997. However, the efficiency of the programme is limited due to several reasons, which include lack of suitable fishing technologies, unidentified fishing grounds, lack of skilled labour forces and inadequacy of services for the vessels operated in offshore areas.

Management measures

The government proposed to establish 15 marine protected areas of which three have already been funded and are under implementation. These include Hon Mun, Cu Lao Cham and Con Dao. The aim is to conserve 2 percent of the marine area of the country by 2010.

Input controls

Input controls are limited to a modest number of gear size and type restrictions, but are seldom enforced due to budgetary constraints. Fishing licenses are imposed, but many fishermen appear to ignore them. Licenses are granted on the basis of submitting a number of supporting documents such as vessel inspection and registration papers. A small license fee, proportional to engine size is levied. The marine capture fisheries are in open access *e.g.* a license application generally leads to a license being issued.

Output controls

The total allowable catch (TAC) is set for five different areas; Gulf of Tonkin, Central Region, South-eastern Vietnam, South-western Vietnam, Sea Mouth and the total Sea Area. The total estimated fish stocks is 4.18 million tonnes and the TAC is set at 1.67 million tonnes **(Table 9)**.

Table 9: Fish stock and TAC per region and per class of fish

Area/ Species	Fish stock '000 tonnes	TAC '000 tonnes
Gulf of Tonkin	681.2	272.5
Central Region	606.4	242.6
South Eastern	2 075.9	830.5
South Western	506.7	202.3
Sea Mouth	10.0	2.5
Total Sea Area	300.0	120.0
	4 180.2	1 670.4
Small pelagic	1 730.0	694.1
Demersal <50 m	597.6	239.2
Demersal >50 m	1 542.6	617.1
Deep sea pelagic	300.0	120.0
Total	**4 180.2**	**1 670.4**

Source: Fistenet based on RIMF 1997 estimates, cited from FAO

However, a new Fisheries Law was drafted by the erstwhile Ministry of Fisheries (now part of MARD) with help from Norwegian Development Agency (NORAD) and FAO. This Law was passed by the National Assembly in November 2003 and went into effect on July 1, 2004. The Law states that fisheries resources shall be subject to the ownership of the people and under the integrated management of the State. It aims to promote economic effectiveness in accordance with the protection, rehabilitation and development of fisheries resources and biodiversity and protection of the environment and development in accordance with national and provincial master plans. As experience is gained with the implementation of the law, it may be necessary to amend it, pass appropriate decrees that define the rights of government, fishers, aquaculturists and other stakeholders. In principle, government intervention in the sector can best focus on setting the framework for development, regulation (*e.g.*, effort limitation), monitoring, surveillance and enforcement, extension and information dissemination. Involvement in investment decisions should be limited to ensuring environmental sustainability, social aspects such as employment promotion or diversification and adherence to the prevailing laws and policies of the government. At the same time, a consultative process with all key stakeholders should be employed through an enabling framework and required support for it, when formulating management and resource conservation plans.

The development policies of the government are summarized in the fisheries sector Master Plan of 2004. The Ministry (MARD) remains responsible for sector planning; though much detailed planning is now undertaken at provincial and lower administrative levels in line with the decentralization policies of the Government. Basic planning takes place at the commune level, with plans aggregated at district, province and ultimately national level. Plans include annual budgets and medium term (5-year) and long-term (10-year) development goals.

The overall development objectives of the Government for the fisheries sector are to increase employment opportunities, income and living standard of fishing and aquaculture communities (social objectives, cohesion); to increase the contribution of fisheries to national economic and social development, including social stability and national security (growth, stability and security); to improve nutritional standards of the people by increasing the supply of fish and aquatic products for domestic consumption (health); to increase exports and foreign exchange earnings by increasing supplies to export and by improving the value added and the processing of fishery products (balance of payment, growth, international competition); and to strengthen the sustainable development of fisheries through improved management of fishery resources and habitats (protection of resource base, monitoring and control).

Research and extension

The Research Institute of Marine Products (RIMP) in Haiphong is the main fisheries research institution in Vietnam. The Institute focuses on biological aspects and is engaged in resource monitoring and stock assessment. The Vietnam Institute of Fisheries Economics and Planning (VIFEP) in Hanoi is also involved in fisheries management issues. Three Research Institute for Aquaculture (located at Habac, Ho Chi Minh City and Nha Trang) carry out scientific research and provide extension services, mainly on fish breeding and seed production and farming techniques. A University, which has focus on fisheries research and development, is also established at Nha Trang. The National Fisheries Extension Center and Information Center carry out the extension activities.

There are also a large number of unions/associations/cooperatives in the fisheries sector, which support the development of the fisheries sector. Some of the prominent ones are the Labour Union of Vietnam's Fisheries Sector, Vietnam Fisheries Association and the Vietnam Association of Seafood Exporters and Producers.

Co-management

The concept of co-management was highlighted in Vietnam during May 1995. Since then, co-management has made substantial progress. In particular, the rights to manage inland waters have been passed to communes. In coastal areas, pilot marine co-management schemes have commenced in at least four provinces (Quang Ninh, Khanh Hoa, Binh Thuan and Yen Bai). Co-management principles are being applied under the World Bank/GEF/DANIDA financed Hon Mun MPA Project. In brackish water aquaculture, awareness of co-management principles is more widespread, but there is a need to provide guidance to Department of Agriculture (Provincial) and farmers in implementation, for example, in environmentally sound water and drainage management.

The Fisheries Sector Programme, FSPS II, funded by Denmark, highly emphasizes the strengthening of capture fisheries management under the pilot project in Quy Huong. FSPS II aims to improve co-management in the fisheries sector as this is expected to improve both sustainability and national ownership. Through the strengthening of fishermen's unions, the Danish-funded programme aims to improve the capacity of the fishers to take active part in resource management. It is hoped that the progress in Quy Huong commune will lead to the establishment of similar co-management units in other provinces throughout Vietnam.

The fishermen in Quy Huong have already identified several issues to be included in a management plan, such as the need for investigating the performance and sustainability of their fisheries practices in order to increase the productivity. In addition to this, the fishermen are interested in developing sustainable cage culture systems. Currently, there is only one cage culture farmer due to bad experiences with diseased fish stocks. The fishermen are also experiencing water quality problems, as the nearby reservoir is causing irregular water level fluctuations and even poisonous sediments. The local fishers are expressing the will to solve these issues and integrate them in a co-management plan.

Co-management is also promoted under the new Fisheries Law of 2004. There is also support under the government's grass-roots democratization policy, which delegates substantial power to the communes in the planning, development and management of their resources.

2.1.4 Development Prospects/ Strategies

Fisheries in Vietnam have been recognized by the Government as one of the main sectors of economical importance and this sector is expected to grow. The (marine) aquaculture sector is having the best prospects for the future, followed by off-shore fisheries. The Government has set targets up to 2010 for both fisheries and aquaculture, which are shown in **Tables 10 and 11** (on next page).

Table 10: Fisheries Production Targets in Vietnam, 2001, 2005 and 2010

Items	2001	2005	2010
Marine capture fisheries, 1 000 MT	1 320	1 350	1 400
- Inshore	870	800	700
- Off-shore	450	550	700

Transforming the agriculture sector in Vietnam

Agriculture sector contribute about 20 percent of GDP of Vietnam and about 25 percent of the export earning. It supports livelihood of nearly 70 percent of the workforce in Vietnam. However, scattered farming plots, small-scale of operation and lack of human capital are some of the limiting factors affecting the growth of the sector. The growth of agriculture sector has declined in recent decades to 3.5 percent from 4.1 percent in the last decades.

Due to rapid urbanization, the sector is not only loosing lands (about 70 000 ha annually) but also its source of finance. The banks used to cater to the rural sector but are now turning towards the urban areas further reducing the credit availability for agricultural and agro-business enterprises. It is argued that low profitability and risks of natural disasters are the factors responsible for this resource migration.

However, agriculture still holds the key to transforming rural economy of Vietnam and providing food for its growing population. Acknowledging the inseparable position of agriculture in Viet-economy, the government in April 2008 has decided to stop conversion of farmland to non-farm use.

During the July 2008 Congress, the Government asserted on the importance of agriculture and passed a resolution (26-NQ/TU) to consolidate about 69 percent of small agricultural holdings in the country. The Government also resolved to bring more investment in the sector to maintain a growth rate of 3.5 percent by 2010 and increasing it to 4 percent by 2020.

It is expected that a large part of this investment need can come from FDI in the country. Vietnam is one of the major destinations for FDI flow in Asia. Presently, only about 0.5 percent of this FDI flow now goes to agriculture, forestry and fisheries sector – event that is unstable. However, the hope lies in accession of Vietnam in WTO that opened the world market for agriculture product. According to researchers and business houses, Vietnam has opportunity in cheap labour force and fertility of land. These opportunities should be converted into attraction through suitable policies. The Government resolution to consolidate small holdings and encouraging FDI in agriculture is expected to fill this policy vacuums in coming days.

Table 11: Aquaculture production targets in Vietnam, 2001, 2005 and 2010

Items	2001	2005	2010
Production of Aquaculture, 1 000 MT:	850	1 150	2 000
- freshwater fish	500	600	870
- black tiger shrimp	120	200	360
- marine finfish	10	38	200
- bivalve mollusks	140	185	380
- others	40	127	190
Export value from aquaculture, US$ million	500	1 400	2 500
Employment (1 000's of people)	555	1 400	2 000
Aquaculture areas (1 000's of ha):	700	850	1 000
- fresh water (1 000's of ha)	340	530	650
- brackish-water and marine (1 000's of ha)	300	320	350

Cited from FAO Fisheries and Aquaculture Country Profile of Vietnam (Source: Master Plan of Social-Economic Development of Fisheries Sector, Ministry of Fisheries)

2.1.5 Summing up

The fisheries data in Vietnam is deficient and lacks reliability. Dearth of funds and human resources are the two main reasons for inadequate attention to information collection, collation and dissemination. As a result, available information is not sound enough to make effective policy decisions. More over, the fisheries sector is suffering with overcapitalization implying increased fishing effort/ number of vessels and fleet capacity (hp) combined with decreased catch per unit effort. This is aggravated by the fact that larger trawl vessels continue to fish in coastal waters. Despite the 2003 Fisheries Law, implementation and control is still very difficult.

Lack of infrastructure and facilities like boat and engine repair is a major constraint to divert the fishing effort from inshore fisheries to offshore fisheries. Although data shows under-exploitation in offshore waters, considering the poor quality of data and illegal fishing in offshore waters, such diversion needs careful planning.

Lack of public finance is another constraint, especially for small-scale fishers who are economically not sound. As a result, a large part of the fleet runs on second hand and old engines which undermines the safety of fishers at sea. A decline in coastal aquatic resources has occurred in recent years, which has caused an increased pressure on the livelihood of millions of people who depend on natural aquatic resources *e.g.* small-scale fishing activities.

While growth prospects of aquaculture in Vietnam are very high and the area under aquaculture has rapidly increased, the mechanisms for regulation and infrastructure for production and marketing has not developed in tandem. In many areas, this has resulted in water supply systems not meeting the standards required for aquaculture operations; lack of quality seed in sufficient quantities; poor health management and disease prevention measures, especially in shrimp farming sector; lack of environmental protection for aquaculture areas; dearth of capital for investment in aquaculture infrastructure; limitations on availability of man power, skilled staff and workers; and insufficient administrative capacity for the sector. The bulk of the fingerlings stocked in marine cages are wild caught, which puts a high pressure on the already over-exploited marine resources. Hatcheries are not evenly distributed over the country. Especially farmers in the highlands do not have easy access to seed and fingerlings.

Future demand for fish meal is expected to increase dramatically as an ingredient in aquaculture feeds. Currently, 90 percent of fish meal is imported and the development of Vietnamese aquaculture will therefore be influenced strongly by the price for fish meal and oil in the international market. Fish meal produced domestically is mostly of poor quality because trash fish is degraded by the time it reaches the fish meal plant.

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2.2 Cooperative sector

2.2.1 Evolution of cooperative movement in Vietnam

In socialist philosophy, the cooperative production model holds a crucial link in transformation of an economy towards socialist production model. It is in this respect cooperatives were introduced in Vietnam. Late Ho Chi Minh, the first President of the Socialist Republic of Vietnam (SRV) and the leader of the Viet Minh independence movement first conceived the idea of cooperative production system in Vietnam in 1927. On empirical grounds also a cooperative model was deemed suitable for Vietnam. At the time of independence in 1945, over 90 percent of the Vietnamese population was in the rural areas. However, about 60 percent of peasant households were landless, living on the margin and heavily indebted. About 52 percent of land was in the hand of indigenous landlords representing about 2-3 percent of the population, but the most productive resources were in the hands of French colonists. Guided by the revolutionary motto of 'land to the tiller', the government of SRV, by 1954, completed major land reforms by allocating the land mostly held by the French colonists to 2.1 million landless farmers. However, the farmers had little means for production. During its Eighth Session (1955), the SRV National Assembly First Legislature adopted a set of policies with the following objectives:

- to guarantee land ownership to the peasants;
- to permit free engagement of the work force;
- to promote traditional handicrafts;
- to protect and encourage prospering households; and
- to develop various forms of mutual aid and cooperative endeavours in the countryside.

Dan Chu Cooperative, dealing in handicrafts, was the first cooperative to be established in Thai Nguyen Province in 1948. By 1960, the cooperative movement reached the dominant mass in the production structure of the country. Between 1958 and 1960, more than 50 000 cooperatives were formed. Most of these cooperatives (about 41 000) were agricultural cooperatives with a base of 2.4 million members (about 85 % of total households) and covering 78 percent of the total land. There were also 2 760 handicraft cooperatives with 20 million labours, 250 trading cooperatives at district level, 5 294 credit cooperatives with 2 million members and more than 520 fishery cooperatives commanding 78 percent of labour and 75 percent of boats in the fisheries sector.

This remarkable progress of the cooperative movement in Vietnam after the independence could largely be attributed to the socialistic philosophy of the government. It helped consolidation of productive resources and improved their productivity to an unprecedented level. Information from the General Statistical Office shows, in 1959, the North produced 5.7 millions tonnes of food (paddy equivalent), more than doubling the total output of 1939, which had been the record year of food production before the war. From 1955 to 1959, the total value of agricultural output rose by an average 11.2 percent per year. The average per capita food production was 278 kilograms in 1955, rising to 367.2 kilograms in 1959 (General Statistical Office n.d.).

In 1955, the Management Committee for Supplying and Marketing of Cooperatives in Vietnam was set up. And in 1961 the Union of Small Handicraft Industry Cooperatives was set up. These were two organizations at the national level to manage, represent and support to supplying and marketing cooperatives and small handicraft cooperatives in the country.

In the subsequent period the cooperative movement continued to get the governmental support to uphold and carry forward the initial success. New management measures were implemented and large-scale agriculture cooperatives were established. The village-based cooperatives gradually moved towards commune-based cooperatives and new technologies were introduced to modernize the farming practices. This also resulted in consolidation of the assets. In 1965, the value of fixed assets in cooperatives increased 6.5 times compared to 1960. Irrigation system was built and fields were improved. For this reason, in 1960 the number of farmer participating in cooperatives increased from 84.8 percent to 90 percent in 1965 and cultivated land area under the cooperatives increased to 80.3 percent.

In the non-agricultural areas, cooperatives in handicrafts, trading, transportation, credit and construction took the lead. Handicraft cooperatives were also consolidated and improved technologies were introduced to increase the quality of products. The resulted in the value of production growing by 8.4 times between the years 1960 and 1965. This was also the beginning of export of cooperative products from Vietnam. Supplying and marketing cooperatives were set up in the communes to widen supply and marketing systems to villages. Within 3 years, from 1962 to 1965, there were 3 000 supplying and marketing cooperatives.

Subsequently, the country passed through a troubled economy during the US-Vietnam war. The cooperative sector of the erstwhile North Vietnam played an important role in the war by providing supplies like food. By 1986, there were over 16 740 agricultural cooperatives, 40 228 producers cooperatives with 94.2 percent farmer households and 81 percent of agricultural land. The sector contributed over 80 percent of food products of the country. In the industry and handicrafts sectors, there were 32 000 cooperatives with 127 million labour and the trading sector had 9 600 supplying and marketing cooperatives in the districts with 20 percent of total retail products circulation rate in the market. In transportation sector, there were 9 900 cooperatives dealing with 45 percent goods and 50 percent of the passenger traffic.

However, through out its impressive journey there have been some points of concern: First, implementation of cooperative system in North Vietnam, which was largely semi-feudal was quite different from the implementation in South Vietnam. The latter, owing to US influence had already developed a capitalistic farming system and where unlike North, lands were allocated to peasants to win them from socialist movement; second, after the initial euphoria, production of cooperative sector never reached that of 1959 level. This is despite the enormous expenditure by the government on infrastructure and transforming the low-grade village-based cooperatives to commune-based centralized high-grade cooperatives as mentioned above. Rather, the productivity has continued to decline and more so in commune-based cooperatives. The motivation amongst the farmers declined, as they were earning only 35-40 percent of their income while spending most of their time in the cooperatives. Majority of their income came from the part-time jobs undertaken individually. Thirdly, the true cost of cooperatives was hidden in the series of subsidies. With the changes in the erstwhile socialist block, the flow of such subsidies gradually reduced and inefficient cooperatives ran into loss. Fourthly, the early phase of cooperatives were philosophy driven and often not concurred with ground situation or were not given time to be adapted and that created various compatibility problems.

2.2.2 The economic reform and present trends in cooperative movement

Worldwide changes in the socialist block also led to major changes in the economy of Vietnam. In mid-eighties (1986), the country adopted the path of renovation or *Doi moi*. Under the economic reform, the government abolished subsidies on various production inputs. As a result, the cooperatives are now facing actual cost-profit scenario. Some cooperatives transformed themselves to meet the requirements of

the new mechanisms and evolved accordingly. As per the new Cooperative Law of 1996 and its revision in 2003, all the cooperatives established before 1997 were required to re-register. It created conditions to consolidate organization, renew production relations and strengthen the labour force in cooperatives. Many cooperatives set up the working plan, mobilized the contribution from members to face the new challenges.

For agriculture sector, the *doi moi* implies repositioning of individual farm household as basic unit of production instead of the cooperative system. Earlier farm households were members of all these cooperatives. Children born in member farm households were automatically registered as members when they reached 16 years. The cooperatives also provided a number of services for the farm households, including social welfare, schools, kindergartens and health care centres. On the other hand, the economic reforms also acknowledged equal status to private and cooperatives before the Law and the state. This deviation from the earlier philosophy put the cooperatives at par with the private enterprises.

Many former agricultural cooperatives and production groups - especially in the northern mountain region were dissolved after land had been allotted to the former members. Between 1988 and 1994, more than 2 950 cooperatives (17.4 % of the total number of former co-operatives) and 33 800 production groups (93% of the total number of production groups) were dissolved by their members. By the end of 1994, a total of 16 243 former agricultural cooperatives and 2 548 production groups existed throughout the country, covering about 64 percent of all farm households. However, the agricultural cooperatives showed differences in operational performance. It was also seen that the smaller cooperatives were able to quickly respond to the new conditions, as their range of service provision were smaller and their collaboration with the member farm households more intense.

At present, (as on 30 June 2008) there are 3 00 000 cooperation groups (pre-cooperatives) and 17 900 cooperatives operating in Vietnam. These cooperatives comprise 8 553 agricultural cooperatives, 2 996 small industry, handicraft and construction cooperatives, 1 085 transportation cooperatives, 458 fishery cooperatives, 860 consumer and services cooperatives, 1 006 credit cooperatives, 2 708 electricity service cooperatives, 113 environmental service cooperatives and 121 cooperatives in other sectors. Among them 42.5 percent are good (profitable), 44.5 percent average (can recover cost) and 13 percent are below average (incurring loss).

Although the leadership of these below average cooperatives remains in place, they neither have economical activities nor provide any services to the members. The management costs are mainly paid out of debt recovered from the members, from selling cooperative assets, or from mobilization of contributions from the members. In many regions, however, members refuse to provide any additional funds. As a result, the number of 'bad' cooperatives is increasing, thus becoming an obstacle not only to the economical development of farm households but also to the economy of the country as a whole.

From the year 2000 to now, the cooperative sector has contributed 6.8 percent – 8.7 percent to GDP. In 2000, the value of products from cooperatives increased from 37 900 million VND to 57 000 million VND in 2005. Together with renovation and development of cooperatives and the cooperative sectors, in the October 2003, Vietnam Cooperative Alliance was established combining two national organizations: the Union of Small Handicraft Industry Cooperatives of Vietnam and the Management of Committee for Supplying and Marketing of Cooperatives in Vietnam. Vietnam Cooperative Alliance (VCA) was reorganized to represents and supports all kind of cooperatives in Vietnam.

2.2.3 Institutional framework

The Law on Cooperatives of 1996 (Revised on 2003)

The Law on Cooperatives of 2003 was passed in accordance with the Constitution of the Socialist Republic of Vietnam of 1992 that was amended and supplemented by Resolution No 51/2001 – QH10 dated 25th December 2001 of the National Assembly of 10th Legislature, 10th Session.

Some of the features of the revised law are:

- Clear definition of the concepts of the cooperatives.
- Extension of the scope of the participation such as the State officers and civil servants, legal entities to join cooperatives.
- Simplify the business registration procedures.
- Cooperatives are allowed to set up companies or enterprises.
- Chairman can be voted among the members or hired from outside.

Defining cooperatives

Article 1 of the Law on Cooperatives defines a Cooperative as:

"A cooperative shall mean a collective economic entity established by individuals, family households, or legal persons (hereinafter referred to as "members") who have common needs and interests, and who contribute capital or labour voluntarily in accordance with the provisions of this law to promote the collective strength of each member joining the cooperative for the purpose of mutual assistance in efficiently carrying out manufacturing or business activities and in improving material or spiritual life, and thereby contributing to the socio-economic development of the country.

Cooperatives shall operate as a form of business enterprise, enjoy legal person status, be autonomous, be liable for financial responsibilities within the limit of share capital, accumulated fund, and other funds of the cooperative according to the provisions of the laws."

The definition of cooperative clearly indicates some important departure from earlier models:

(i) recognition of need and interest of individual members/ families;

(ii) instead of being state promoted, cooperatives have become member-promoted;

(iii) an autonomous business entity like a private entity and thus removing any unnecessary bureaucratic interference on working of the cooperatives;

(iv) by efficiently carrying out business activities, cooperatives are expected to earn profit; and

(v) sovereignty in dealing with their internal organizational and financial matters.

Article 3 of the Law on Cooperatives states that the State shall implement the following policies for cooperatives:

- To promulgate and implement policies and programmes supporting development of cooperatives through training of staff, human resource development, land, finance, and credit; to set up an assistance fund for the development of cooperatives; to apply science and technology, marketing and market expansion techniques; to invest in developing basic infrastructure; and to facilitate cooperatives joining in the socio-economic development programmes of the State.

- To encourage and create favorable conditions for cooperatives to develop.
- To ensure that the legal status and manufacturing or business conditions of cooperatives are equivalent to those of other enterprises.
- To protect the legitimate rights and interests of cooperatives in accordance with the provisions of the laws.
- To respect the right to self-management, self-determination, and self-accountability in the manufacturing or business activities of cooperatives.
- Not to interfere with the internal management and legitimate operation of cooperatives.
- In the case of agricultural cooperatives, the Government shall create incentive policies in conformity with the specific conditions and pace of development at the time.

To build the human capital of cooperatives, the government provides support towards training fee and training materials. The Land policies include allocation of land free of charge and granting the land use right certificate to the agricultural cooperatives. Non-agricultural cooperatives can lease the land for long -term and reduce 50 percent of lease fee for the first two years. The credit policy of the government provides exemption of corporation income tax for the newly established cooperatives or the restructured cooperatives in the first two years. Cooperatives can borrow capital from credit institutions, banks and national projects, etc. The government also provides support to promote trade, provide information, seek the markets for members and cooperatives in domestic and overseas and introduce and display the products in the exhibitions and trade-fairs. In other words, from a determinant of the cooperatives, the government in the new framework has become a facilitator of the cooperatives.

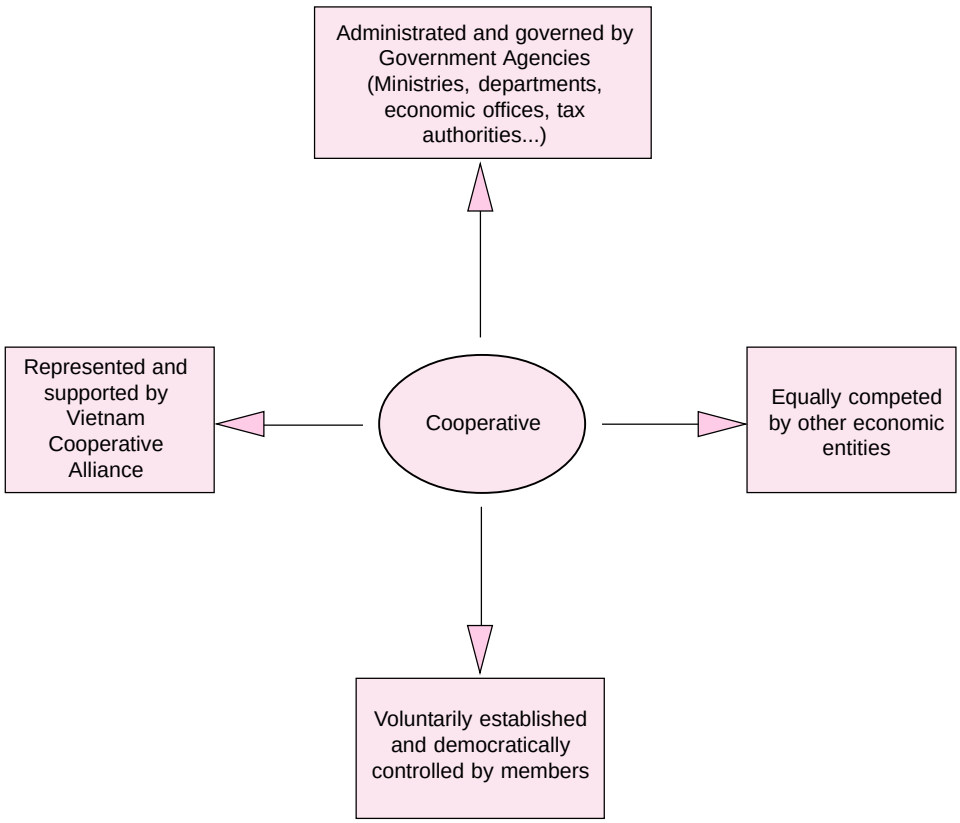
In its reformed phase, the guideline issued by the government for development of the cooperatives recognizes that the cooperatives are still important for the country as:

- an efficient institution for farmers, small producers and poor people to develop and achieve economical, social and cultural objectives;
- a mechanism to secure political and social stability and balanced development; and
- as a foundation to strengthen the national economy.

To enable cooperatives to fulfill their important roles, a comprehensive renovation process must be executed with the objectives of:

- enhancing capacity and efficiency;
- promoting development of cooperatives in various sectors;
- supporting production and business of members;
- encouraging individuals, households to be cooperative members; and
- facilitating establishment of business associations and cooperation between cooperatives.

In the present structure the cooperatives are required to register with the Department of Planning and Investment in each province or Economic Office at district level. The Ministry of Planning and Investment (MPI) will give consultation to the government about strategy, plan, programmes of cooperative development and coordinate with related Ministries/agencies to promulgate, disseminate and organize the implementation of the legal documents. Each concerned Ministry has established department/ bureau to govern cooperatives in its production sector. The District Economic Office, under the present framework, will nominate one official to monitor the cooperative movement in their area (see **Figure** on facing page).



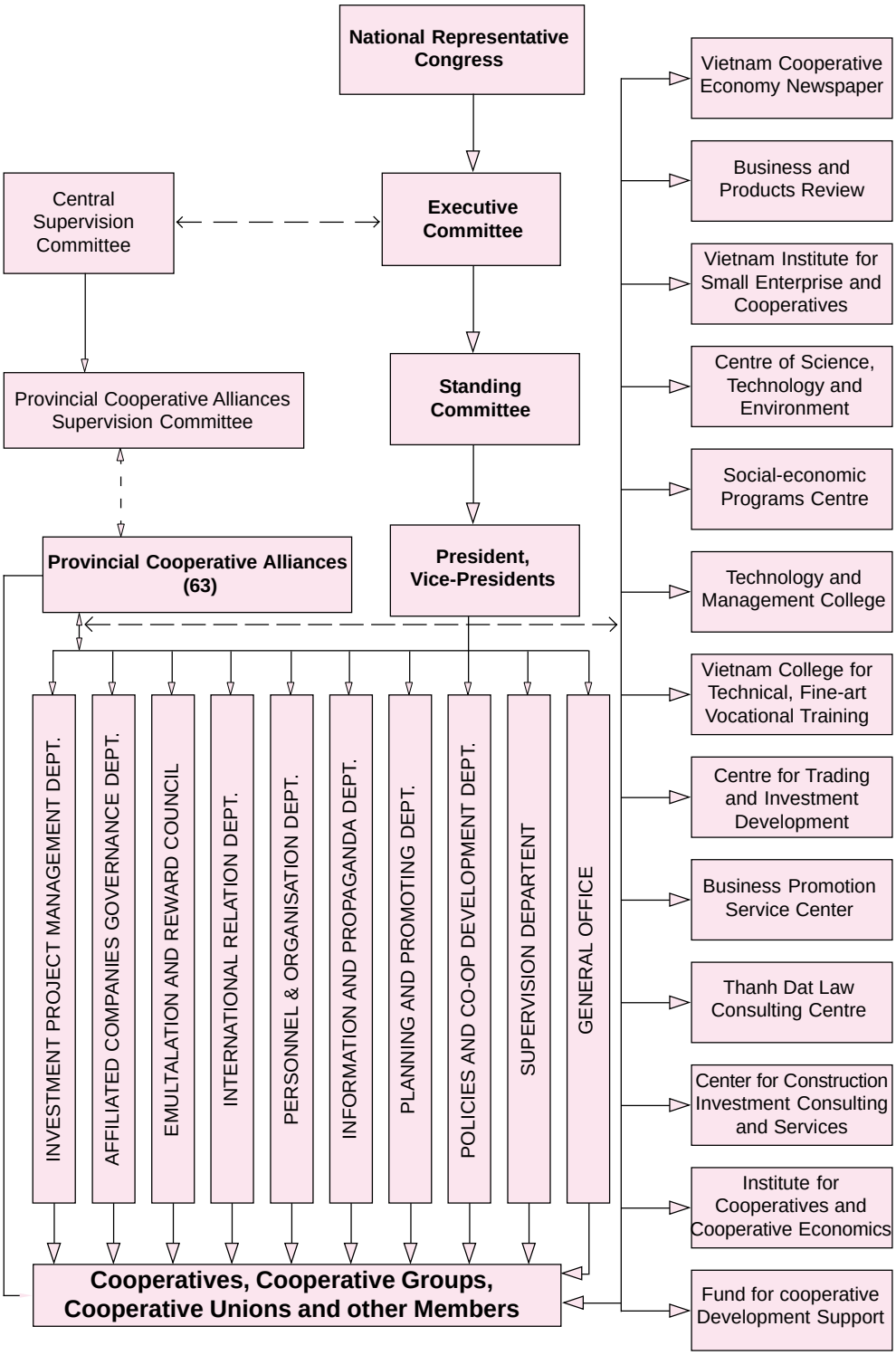
Position of cooperative sector in Vietnam after the economic reforms

2.2.4 The Vietnam Cooperative Alliance

The Vietnam Cooperative Alliance (VCA) evolved from the erstwhile Central Council of Non-State Enterprises. On 18th December 1991, on the behest (Decision 409/CT) of the Chairman of the Ministerial Council, currently known as the Prime Minister, the Central Council of Non-State Enterprises was set up by merging the Central Management Committee of Supplying and Marketing Cooperatives and the Central Union of Small Handicraft Industry Cooperatives. The first National Representative Congress of Cooperatives, held on 30th October 1993 approved the renaming of the Central Council of Non-state Enterprises of Vietnam into the Central Council of Vietnam Cooperative Alliance, the organization which supports, represents and protects the rights and legitimate interests of cooperatives in the areas of small handicraft, industry, transport, trade, service, construction, etc.

Presently, VCA has become an extensively organized system with a wide network from the central level to 64 provinces and city level in Vietnam. In the global forum, VCA is an official member of two international organizations: the International Cooperative Alliance (ICA) and the World Association of Small and Medium-scaled Enterprises (WASME) and represents Vietnamese Employers in the International Labor Organization (ILO). VCA has established cooperative relations with other international and regional cooperative federations and jointly exchanges information with over 300 international and non-governmental organizations.

Organization Chart of VCA



Functions and Tasks of VCA

Functions

- Representing and protecting the legal rights of its members.
- Promoting the development of cooperatives and the cooperative economy.
- Providing consulting and support services to its members.
- Participating in formulation of policy and legal frameworks related to the cooperative sector.
- Representing its members legally in internal and external relations.

Tasks

- Participating in formulation of strategies, plans and programmes, which are aimed to support and develop cooperatives and the cooperative sector.
- Generalizing ideas and aspirations of its members to recommend related problems and legal issues to the Government and other State-authorized organizations.
- Protecting the legal rights and interests of members.
- Encouraging individuals, business owners, business households, small and medium-scale producers to promote cooperatives and the cooperative economy. Generalizing good experiences and advanced cooperative models to promote the movement for the development of cooperatives and cooperative sector.
- Organizing and providing consulting and support services to the members on legal issues, technology, information, finance, credit, markets, etc.
- Organizing training courses for cooperative alliance officers, cooperative managers, staff, employees and other members.
- Participating in international organizations, non-governmental organizations and developing cooperative relations with international organizations.
- Adopting and implementing support programmes and projects for developing cooperatives and the cooperative economy.
- Conducting other activities assigned by the Government and other authorities.

2.2.5 Conclusion

The development of a genuine cooperative network is a long-term process. It requires a continuous participatory dialogue within the cooperative and group movement and with external agencies, that may provide assistance supplementary to internally mobilized resources. The development of the required business and entrepreneurial skills in a competitive market economy is of particular importance in a previously state regulated economy such as Vietnam. The present government policies are a definite step toward this direction. However, all participants in the process of cooperatives should be aware that an effective cooperative is owned and controlled by its members. It is the members who should strive for attaining their goals and sustainability of the operations.

External agencies, be it the government or the international agencies can play an effective role in capacity building of the cooperatives. In the new era, the future of Vietnamese cooperatives hence will be determined by individuals who as the policy document said can use it as a tool to get over their constraint of resources and compete with the private sector in their quest for excellence.

2.2.6 References

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Annexure

Snap shots of Fisheries Cooperatives visited by the Mission

1.0 Fisheries Cooperatives in Nghe An Province

The fisheries sector

Nghe An Province, with a coastline of 82 km lies in between Thanh Hoa and Ha Tinh Provinces on the northern central coast of Vietnam. There are 3 520 fishing vessels and three fishing ports in the Province. The fishing port at Cua Hoi accommodates about 1 000 vessels of over 800 hp capacity; Lach Quen fishing port has berthing facilities for 800 – 900 vessels with over 250 hp capacity and Lach Van fishing port can accommodate 700 – 800 vessels with over 250 hp capacity.

Besides the above, there are private small-scale fishing ports and service supply facilities for fishers such as petrol and diesel supply, ice and cold storage, maintenance and repair located at the nearby coastal communes. Marine fisheries, aquaculture and processing are the three main activities in the Province. On an average, the Province deals with fish catch of 45 – 50 000 tonnes/ year valued at 700 – 800 billion VND. The fisheries sector provides employment to about 6 500–7 000 persons on a regular basis and the average monthly income for the workers is estimated at 450 -500 000 VND.

The Province has about 14 000 ha under aquaculture, employing 2 500 – 3 000 persons regularly, with an annual production of about 20 – 25 000 tonnes of fin and shellfishes. The hatcheries in the Province produce about 200 - 300 million fish seed and 150 - 200 million of shrimp post-larvae annually. Depending on type of aquaculture (extensive/ semi-intensive), the average monthly income varies from 7 00 000 – 10 00 000 VND/ family to 3 00 000 – 4 00 000 VND/ family. About 50-60% of the catch is processed. The main products from processing are fish sauce and dried squids/ shrimps/ fishes. The processing industry employs about 2 700 – 3 000 persons regularly with an average monthly income of VND 6 00 000 – 7 00000 /month / family.

Fishery cooperatives

There are 47 fisheries cooperative in Nghe An Province, of which 15 fishery cooperative are involved in offshore catching with a total of 38 vessels having the capacity of 90 - 250 hp. The Province has 27 aquaculture cooperatives with a total area of 1 500 ha under fin and shellfish farming; four processing cooperatives with a capacity of 1 million – 1.5 million tonnes/year/ cooperative and one cooperative is involved in building and repairing of vessels. Other cooperatives are involved in supplying services for the fishery cooperatives and other individuals. There are also 12 cooperation groups involved in catching fishes with 360 small and medium-scale vessels with fishing boats having engine capacity of 35 – 90 hp; and 125 cooperation groups involved in aquaculture with an area of 7 200 ha and 4 cooperation groups in processing fish sauce and dried seafood products.


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2.0 Song Lam Fisheries Production and Services Cooperative in Nghe An Province

Background

This Cooperative was established on 21 July 1971 and is located in Hai Trieu Group, Nghi Hai Precinct, Cua Lo Town, Nghe An Province. In the process of its construction and development, the Cooperative was awarded the merit of Hero of Labour by the Government. After the new law was passed, the Cooperative adapted itself to market mechanism and also diversified its activities. Based on its good performance in the renovation process, the cooperative was awarded the Order of Labour of Third Grade by the President of Vietnam in 2003.

The Cooperative has a total membership of 136 persons (69 men and 67 women). It has also set up one affiliated company (Song Lam Production and Trading Company Ltd) and one Vocational Training Center. At present, the total capital of the Cooperative is 11 billion VND in which 3.5 billion VND is fixed capital and 7.5 billion VND is working capital.

The main industrial activities of the cooperative include (i) building new vessels and repairing facilities; (ii) civil and industrial construction works; (iii) seafood processing; (iv) ice production and (v) manufacturing. The business activities are (i) supply of petrol, diesel, gas and electricity; (ii) joint venture to supply labourers; (iii) providing vocational trainings at the primary level; (iv) operating two restaurants; and (v)providing general services and trading. The achievements of the Cooperative during the period 2004 – 2008 are as follows:

Achievements from 2004 - 2008

Items	Unit	2004	2005	2006	2007	2008
Turnover	Million VND	8,450	10,500	12,500	14,500	17,500
Income/person/month	Thousand VND	750	900	1,000	1,300	1,700
Total capital	Million VND	5,623	7,615	8,530	11,100	14,500
In which: Fixed capital	Million VND	2,819	3,392	3,922	5,410	8,500
Working capital	Million VND	2,804	4,223	4,608	5,690	6,000
Total labourers	Person	88	98	107	118	126
Number of crewmen working abroad	Person	320	390	480	570	680

To meet the challenge of market economy, the Cooperative has expanded and invested in other business sectors such as supplying petrol, diesel, seafood processing, sending crewmen abroad, construction, electricity supplies, restaurant while maintaining the traditional occupations at the same time.

Challenges and future plan

Nghi Hai Precinct is a density populated coastal area. The Cooperative is located in a potential area and has prospects for new activities. However, the Cooperative still faces many difficulties such as incomplete facilities, low skills in marketing and severe competition in seafood business. However, the strength of the Cooperative lies in its ability to reform with time and a rich experience in cooperative production.

3.0 Quyet Thang Fishery Cooperative – Ba Ria Vung Tau Province

Background

Phuoc Tinh commune is a coastal commune with a coastline of 3.0 km. There are 25 000 residents in the commune, of which 70 percent are engaged in fishing. There are 1 168 vessels with a total capacity of 2 00 000 hp. The Cooperative was set up on 7 November 2005 and is engaged in offshore fishing, services supplies for fishing, internal credit and aquaculture. Starting with 7 members, 60 direct labourers and 84 indirect labourers and a capital of 450 million VND, the Cooperative in three years has grown to 11 members, 125 direct labourers and 270 indirect labourers and a capital of 550 million VND. At present, there are some 18 fishing vessels with the total capacity of 8 820 hp, valued as 28 billion VND. The Cooperative was granted the Business license by the Long Dien People's Committee and started offshore fishing since the beginning of the establishment.

Challenges

The Cooperative suffered heavy losses from storms in 2006 and 2007. The increasing price of petrol and diesels are affecting the turnover of the Cooperative badly. In spite of the loss, the Cooperative has managed to double its profit in one year. The income of members of the Cooperative has increased from 203 million VND/ member/ year in 2006 to 394 million VND/ member/ year in 2007. The average monthly income of the labourers in the cooperative is 2 600 000 VND/ person/ month. In the first half of 2008, the profit of the Cooperative reached 3 254 million VND.

The Cooperative is also engaged in development of living standard of its members and labourers. It often provides training and education for the members and the labourers and takes initiative to invest in new technology and equipment for catching and upgrading the capacity of the vessels of the Cooperative.

Future plans

The Cooperative is planning to upgrade 4 vessels to 660 hp and bring them into operation in the beginning of 2009. There is also a plan to build a cold storage. The construction of fishing port for the Cooperative and provision for petrol and diesel for fishing vessels at sea is also under progress.

4.0 Rang Dong Fishery Cooperative

Background

Established in 1997, the Rang Dong Fishery Cooperative has 1 924 members. It is located in Thoi Loi I hamlet, Thoi Thuan Commune, Binh Dai District, Ben Tre Province. The Cooperative is engaged in raising aquaculture and managing and exploiting the natural fishery resources.

The motto of the cooperative can be summarized in a Vietnamese proverb 'Do not breathe through others nose'. Starting with 1 116 household members and 3 000 labourers and legal capital of 20 07 90 000 VND, the Cooperative has now 1 765 household members and 1 924 members, 3 500 labourers, of which 1 000 are permanent labourers. The legal capital now exceeds 2 billion VND with a share capital amount of 396 million VND in 2008. The Cooperative has become a good example in managing and exploiting the natural fishery resources in Ben Tre Province.

According to Ben Tre Cooperative Alliance, Rang Dong was the first Cooperative of the Province which has applied the resource exploitation model in combination with sustainable development of the natural fishery resources. The success of the Cooperative has persuaded the Provincial leaders to establish nine more such cooperatives in the region.

Since its establishment in 1997, the Cooperative was assigned by the Province to manage the natural fishery resources in a total area of 900 hectares for both raising breeding clams (in 100 ha) and fattening them for meat (in 800 ha). The Cooperative has divided the resource into different areas for exploitation in order to ensure sustainable fishing, environmental conservation and ensuring quality and size of the harvested clams (30 – 40 clams/kg). The average income (only from clam exploitation and raising) is 7 00 000 VND per month per person. To supplement their income, the members/ labourers during the remaining period undertake rice cultivation, horticulture, shrimp and oyster farming, salt production and off shore fishing.

Challenges

Environment pollution is one of the biggest challenges for fisheries resources in general in the region and Rang Dong Fishery Cooperative in particular. For example, oil pollution damaged the clam beds in April of 2007 and the Cooperative lost about 20 billion VND. Untreated waste water from the catfish and shrimp ponds is directly released into the sea, which also poses threat to the environment. If the local authorities do not take any action, it is likely to affect the water quality and damage the fisheries resources.

Future plans

The Cooperative has decided to coordinate with partners from China to artificially breed the clams and release them in the open waters for increasing the production. The other programmes include (i) establishing a Union of fishery cooperatives in Ben Tre Province; (ii) establishing freshwater manufacturing unit in the commune, (ii) quality ice production for clams processing; (iii) providing pipeline for supply of water to the residents; and (iv) and investing in a new seafood processing unit at the local commune.

3.0 Preparations for Phase Two

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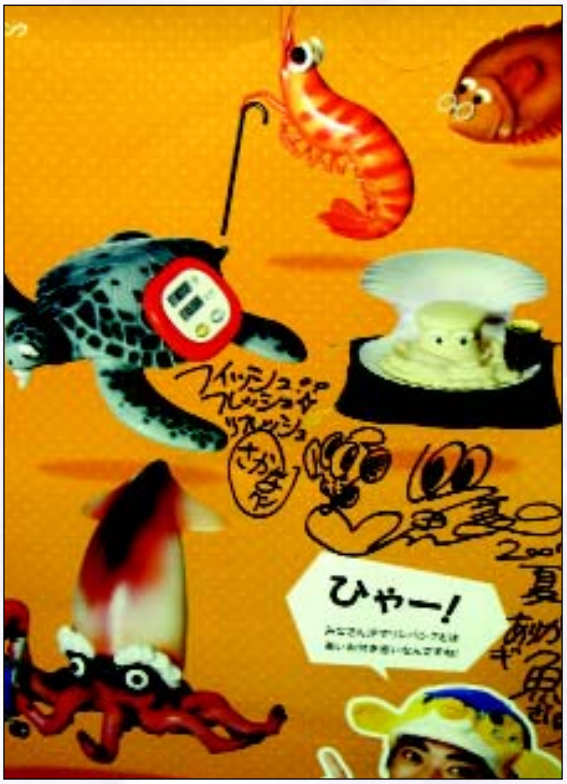
7.0	**Mr Nguyen Trinh** 	Chairman Quyet Thang Fishery Cooperative 186 Phuoc Hiep, Phuoc Tinh Commune Long Dien District Ba Ria Vung Tau Province Vietnam *Tel: + 84 (64) 842 628; + 84 (91) 9210021(Mobile)*

Sl. No	Name & Photograph	Position/ Organization/ Address
8.0	**Dr Yugraj Singh Yadava** 	Director Bay of Bengal Programme Inter-Governmental Organization 91 St. Mary's Road, Abhiramapuram Chennai 600 018, India *Tel: + 91 (44) 2493 6188; + 9841042235 (Mobile)* *Fax: + 91 (44) 2493 6102* *E-mail: yugraj.yadava@bobpigo.org*
9.0	**Mr Jun-ichiro Okamoto** 	Professor Marine Bio-Resource Management Strategy Faculty of Fisheries, Hokkaido University 3-1- Minato-Cho, Hakodate Hokkaido, Japan 041-8611 *Tel: + 81 (138) 40 5522; + 81 (90) 84535554 (Mobile)* *Fax: + 81 (138) 40 5522* *E-mail: jokamoto@fish.hokudai.ac.jp*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3.2 Itinerary of the Study Team in Japan

Date/ Month	Itinerary
September 13 (Saturday)	
19:10	Dr Yugraj Singh Yadava, Advisor arrives at Narita International Airport by MH 70
	Hotel: ANA Crowne Plaza Hotel, Narita
September 14 (Sunday)	
06:50	Participants arrive at Narita International Airport by VN 954
08:00 - 08:30	Brief orientation on Phase Two Programme by Mr Masaaki Sato, Secretary, ICFO
09:00 - 15:00	Arrive at hotel (Leave luggage at Hotel and proceed for sightseeing) Return to the Hotel and check-in. Free after the check-in.
	Hotel: Kanda City Hotel, Tokyo
September 15 (Monday)	National Holiday: "KEIRO NO HI (Respect the Old-Aged Day)"
AM	Free
14:00 - 17:00	Visit to Fish Retail Shop 'Yoshiike' in Okachimachi, Tokyo.
	Hotel: Kanda City Hotel, Tokyo
September 16 Tuesday	
06:00 - 07:30	Visit to Tokyo Metropolitan Government's Central Wholesale Market at Tsukiji (to be guided by Mr Yoshihiro TERASAKI and Mr Yuzo USHIYAMA) - Observation of wholesale marketing of fish and fishery products - Video presentation on the Central Wholesale Market
10:00 - 10:30	Visit JF Zengyoren (National Federation of FCAs) Opening Ceremony of Phase Two of the Training Project Venue: Meeting Room Number 5, 6th Floor, Co-op. Bldg., 1-1-12 Uchikanda, Chiyoda-Ku, Tokyo **Welcome speech** a) Speech by Mr Kuniyuki MIYAHARA, Senior Managing Director, JF ZENGYOREN on behalf of Mr Ikuhiro HATTORI, Chairman, ICFO b) Speech by Mr Masahiko SUNEYA, Director, International Cooperation Division, Ministry of Agriculture, Forestry & Fisheries (MAFF) c) Group Photo d) Orientation by Mr Masaaki SATO, Secretary, ICFO
	Lectures
10:30 - 11:00	1) Phase One Report of the Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Vietnam – 2008 by Dr Yugraj Singh Yadava, Director, Bay of Bengal Programme Inter-Governmental Organisation, Chennai, India.
11:00 - 12:00	2) Coastal Fisheries Resources Management and Issues in Japan by Professor Junichiro OKAMOTO, Marine Bio-Resources Management Strategy, Faculty of Fisheries Sciences, Hokkaido University, Hakodate, Japan.
12:00 - 13:00	**Lunch**
	Lecture
13:00 - 14:00	3) Fishery Mutual Insurance in Japan by Mr Izumi ISHIZAKA Managing Director, GYOSAIREN (National Federation of Fishery Mutual Insurance Associations) Tokyo, Japan.

Date/ Month	Itinerary
14:30 - 16:30	Visit to MAFF, Government of Japan (Venue: Meeting Room of MAFF, Kasumigaseki).
	Lectures
14:30 - 15:00	4) Administration policies and measures concerning agriculture, forestry and fisheries of the Government of Japan by Mr Toshiya YAMAGUCHI, Section Chief, International Cooperation Division, International Affairs Department, MAFF, Government of Japan
15:00 - 16:30	5) Fisheries Resource Management in Japan by Mr Hidemi TANAKA Specialist on Management of Fisheries Resources, Resource Management Promotion Office, Fishery Agency, Government of Japan.
	Hotel: Kanda City Hotel, Tokyo
September 17 (Wednesday)	
10:00 - 10:15	Courtesy call on Mr Ikuhiro HATTORI, Chairman, ICFO
	(Venue: Board of Directors Meeting Room, 7th Floor, Co-op. Bldg., 1-1-12
	Uchikanda, Chiyoda-Ku, Tokyo)
12:30	Leave Haneda Airport by ANA 535
13:45	Arrive at Takamatsu Airport
15:30 - 17:00	Visit to Kagawa Prefectural Government
	(Venue: Fishery Section, Department of Agricultural Policy and Fishery, Kagawa Prefectural Government)
	Lecture
	6) Present state of Fisheries in Kagawa Prefecture and implementation of Fisheries Resource Management by Mr Toshimitsu MASUI, Engineer Fisheries Division, Department of Agricultural Administration and Fisheries, Kagawa Prefectural Government.
	Hotel: Okura Hotel Takamatsu
September 18 (Thursday)	
06:00 - 07:30	Visit to Fishery Products Section of the Takamatsu City Central Wholesale Market (to be guided by Mr Hisayuki TAMURA, Assistant chief, Business
	Section)
	Visit to JF Kagawa-Ken Gyoren (Kagawa Prefectural Federation of Fisheries Cooperative Associations)
	Lectures
09:30 - 11:00	7) Organization and Activities of JF Kagawa-Ken Gyoren, with special reference to Promotion of Community-based Fisheries Resource Management by FCA initiatives by Mr Katsuhiro YOSHIDA, Assistant Chief, Guidance Section.
15:00 - 17:00	Visit to Fisheries Research Institute of Kagawa Prefecture (FRI KP)
	8) Role of Fisheries Research Institute of Kagawa Prefecture in implementation of CFRM (Community-based Fisheries Resource Management), and some examples by Mr Koji URAYAMA, Director, FRI KP.
	Hotel: Okura Hotel Takamatsu
September 19 (Friday)	
06:00 - 07:30	Visit to Fish Market of JF Aji Fisheries Cooperative Association (Aji FCA) (to be guided by Mr Sadamitsu UCHIKOSHI, Senior Managing Director, JF Aji FCA)
	- Observation of unloading of catch and auctioning in action
09:00 - 10:30	Visit to JF Aji Fisheries Cooperative Association (Aji FCA)
	Lectures
	9) Organizational Structure and Activities of Aji FCA , with special reference to CFRM implemented by JF Aji FCA by Mr Sadamitsu UCHIKOSHI, Senior Managing Director, JF Aji FCA.
14:00 - 16:30	Visit to JF Uchinomi-Cho Fisheries Cooperative Association (Uchinomi-Cho FCA)

Date/ Month	Itinerary
	10) Organizational Structure and Activities of JF Uchinomi-Cho FCA with special reference to CFRM implemented by Uchinomi-Cho FCA by Mr Nobuhiko SOUNO, Chief of Staff, JF Uchinomi-Cho FCA. ***Hotel: Okura Hotel Takamatsu***
September 20 (Saturday) AM & PM	***Sightseeing*** ***Hotel: Kotohira River Side Hotel***
September 21 (Sunday) AM & PM	Travel from Kagawa Prefecture to Tokyo. Enroute brief halt in Kyoto City for sightseeing. ***Hotel: Kanda City Hotel, Tokyo***
September 22 (Monday) 10:00 - 12:00 14:00 - 17:00	 Visit to National Research Institute of Fisheries Science (NRIFS), Yokohama. **Lecture** 11) Organizational Structure and Research Subjects of NRIFS, with special reference to Roles of NRIFS in Community-based Fisheries Resource Management CFRM) and examples by Mr Koichi KONISHI, Business Promotion Section, NRIFS Preparation of Phase Two Report (Venue: Meeting Room No. 5, 6th Floor, Co-op. Bldg., 1-1-12 Uchikanda, Chiyoda-Ku, Tokyo) ***Hotel: Kanda City Hotel, Tokyo***
September 23 (Tuesday) 10:30 11:00	 Dr Y S Yadava leaves Narita International Airport by MH 89 Participants leave Narita International Airport by VN 955

Information on Hotels

Place	Hotel
Narita	**ANA Crowne Plaza Hotel** 68 Horinouchi, Narita-Shi Chiba-Ken, Japan - 286 0107. Tel: + 81 (476) 33 1311; Fax: + 81 (476) 33 0244 http://www.anacrowneplaza-narita.jp
Tokyo	**Kanda City Hotel** 3-24-5 Uchikanda, Chiyoda-Ku Tokyo, Japan - 101 0047. Phone: + 81 (3) 5296 2200; Fax: + 81 (3) 5296 2525 http://kandacityhotel.jp
Takamatsu	**Okura Hotel Takamatsu** 1-9-5 Jo-Tou-Cho, Takamatsu Shi Kagawa Ken, Japan - 760-0036. Tel: + 81 (87) 821 2222; Fax: + 81 (87) 821 2384 http://www.okurahotel-takamatsu.co.jp
Kotohira	**Kotohira River Side Hotel** 2461-1, Kotohira-Cho, NakaTado-Gun Kagawa Ken, Japan - 766 0002. Tel: + 81 (877) 75 1880; Fax: + 81 (877) 75 2890 http://www.hananoyu.co.jp

3.3 Study Material for Phase Two

The following study material will be provided by ICFO to the participants during Phase Two of the Training Project in Japan.

- An Introduction to Fishery Cooperative Associations (FCAs) in Japan.
- Outline of JF Group.
- The Fisheries Law of Japan.
- Fishing Right and Fishing License Systems in Japan.
- Fisheries Coordination Regulations of Kagawa Prefecture.
- The Fisheries Cooperative Association Law of Japan.
- A Model By-Law of Fisheries Cooperative Association.
- Organization and Activities of two FCAs with some introduction to Community-based Fisheries Resource Management (CFRM) and related activities.
- Key Points of Community-based Fisheries Management in Coastal areas of Japan.
- Report of Phase One - Training Project for Promotion of Community-based Fishery Resource Management by Coastal Small-scale Fishers in Vietnam-2008 (*by Dr Yugraj Singh Yadava, Director, BOBP IGO, Chennai, India*).
- Coastal Fisheries Resources Management and Issues in Japan (*by Mr Junichiro Okamoto, Professor, Faculty of Fisheries Sciences, Hokkaido University, Hakodate, Hokkaido, Japan*).
- Fishery and Aquaculture Insurance Systems in Japan (*by Mr Izumi Ishizuka, Managing Director, National Federation of Fishery Mutual Insurance Associations (GYOSAIREN), Tokyo, Japan*).
- Administration policies and measures concerning agriculture, forestry and fisheries of the Government of Japan (*by Mr Toshiya Yamaguchi, Ministry of Agriculture, Forestry and Fisheries*).
- Fisheries Resource Management in Japan (*by Mr Hidemi Tanaka, Fishery Agency*).
- Market Guide (*The Central Wholesale Market at Tsukiji, Tokyo*).
- The Tokyo Central Wholesale Market at Tsukiji.
- Profile of Kagawa Prefecture.
- Fisheries of Kagawa (*KAGAWA NO SUISAN*) - 2006 with special reference to CFRM.
- Visual Japan's Fisheries (Provisional Translation), Fisheries Agency, September 2007.
- Introduction to the Takamatsu City Central Wholesale Market.
- Introduction to Kagawa Prefecture FCAs.
- Introduction to Kagawa Prefecture Fisheries Research Institute.
- Introduction to National Research Institute of Fisheries Science.


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3.4 Details of Organizations to be visited in Japan

The participants will be visiting the following Organizations during Phase Two of the Training Project in Japan.

Date &Time	Organization	Contact person	Activity
September 16, 2008 (Tuesday)			
06:00 - 07:30	The Central Wholesale Market of Tokyo Metropolitan Government at Tsukiji, Tokyo. 5-2-1 Tsukiji, Chuo-Ku Tokyo, Japan - 104 0045 (Representative of the Organization - Mr Hiroyuki MORIMOTO, Director).	Mr Ihei SUGITA General Affairs Section Management Department Tel: + 81 (3) 3547 8011 Fax:+ 81 (3) 3542 1376 http://www.shijou.metro.tokyo.jp/english	Observations on wholesale marketing of fish and fish products, including auction, and briefing on structure and business of the Wholesale Fish Market at Tsukiji.
10:00 - 10:30	JF ZENGYOREN (= National Federation of Fisheries Cooperative Associations of Japan) 7th Floor, Coop. Building 1-1-12 Uchikanda, Chiyoda-Ku Tokyo, Japan - 101 8503 (Representative of the Organization - Mr Ikuhiro HATTORI, President, JF ZENGYOREN, and Chairman of ICFO).	Mr Masaaki SATO, Secretary, ICFO, c/o Fisheries Policy and International Affairs Department. Tel: + 81 (3) 3294 9617 Mobile: + 81 (80) 202 9782 Fax: + 81 (3) 3294 3347 E-mail: kokusai-sato@r6.dion.ne.jp	Lecture on involvement of ZENGYORN in the fisheries resource management in Japan.
14:30 - 15:00	International Cooperation Division, Ministry of Agriculture, Forestry & Fisheries (MAFF) 1-2-1 Kasumigaseki, Chiyoda-Ku Tokyo, Japan - 100 8950 (Representative of the Organization - Mr Masahiko SUNEYA, Director).	Mr Toshiya YAMAGUCHI Section Chief, International Cooperation Division, International Affairs Department. Tel: + 81 (3) 3592 0313 Fax: + 81 (3) 3502 8083 E-mail: toshiya yamaguchi@nm.maff.go.jp	On development initiatives in fisheries sector by the Government of Japan.
15:00 - 16:30	Fishery Agency, Tokyo 1-2-1 Kasumigaseki, Chiyoda-Ku Tokyo, Japan - 100 8950 (Representative of the Organization - Mr Shuji YAMADA, Director General).	Mr. Hidemi TANAKA Specialist on Management of Fisheries Resources, Resources Management Promotion Office. Tel: + 81 (3) 3502 8452 Fax: + 81 (3) 5510 3397 hidemi_tanaka@nm.maff.go.jp	Promotion of Coastal Fisheries Resources Management (CFRM) in Japan.
September 17, 2008 (Wednesday)			
10:00 - 10:15	JF ZENGYOREN (= National Federation of Fisheries Cooperative Associations of Japan), Tokyo 7th Floor, Coop. Bldg., 1-1-12 Uchikanda, Chiyoda-Ku Tokyo, Japan - 101 8503 (Representative of the Organization - Mr Ikuhiro HATTORI, President, JF ZENGYOREN, andChairman of ICFO)	Mr. Masaaki SATO, Secretary, ICFO, c/o Fisheries Policy and International Affairs Department Tel: + 81 (3) 3294 9617 Mobile: + 81 (80) 3202 9782 Fax: + 81 (3) 3294 3347 E-mail: kokusai-sato@r6.dion.ne.jp	Courtesy call on President of JF ZENGYOREN & Chairman of ICFO of the International Cooperative Alliance (ICA).

Date &Time	Organization	Contact person	Activity
15:30 - 17:00	Kagawa Prefectural Government Fisheries Division Department of Agricultural Administration and Fisheries Takamatsu City, Shikoku 4-1-10 Ban-Cho, Takamatsu Kagawa Prefecture, Japan - 760 8570 (Representatives of the Organizations - Mr Chiyoteru SHIMOKAWA, Director, Fisheries Division; Mr Toshio TENKUMO, Director General, Department of Agricultural Administration and Fisheries; Mr Takeki MANABE, Governor).	Mr Toshimitsu MASUI, Engineer and Mr Hirofumi KIKUCHI, Expert Tel: + 81 (87) 832 3473 (direct) or + 81 (87) 831 1111 Ext. 3962 Fax: + 81 (87) 806 0200 E-mail of Mr Masui: xc4536@pref.kagawa.lg.jp E-mail of Mr Kikuchi: sj8580@pref.kagawa.lg.jp	Present state of fisheries and fisheries resource management in Kagawa Prefecture.
September 18, 2008 (Thursday)			
05:30 - 06:30	The Central Wholesale Market of Takamatsu City, 30-5, Setouchi -Cho, Takamatsu-Shi Kagawa Prefecture, Japan - 760 0012 (Representative of the Organization - Mr. Hideto ONISHI,Director).	Mr Yoshihiro UEHARA, Assistant Chief, Business Section. Tel: + 81 (87) 862 3411 Fax: + 81 (87) 862 3417 Email: yoshihiro_3766@ city.takamatsu.lh.jp	• Observations on wholesale fish marketing in action, including auction. • Organization and activities of the wholesale fish market.
09:30 - 11:00	JF Kagawa-Ken Gyoren (= Kagawa Prefectural Federation of Fisheries Cooperative Associations) 3rd Floor, Gyoren-Kaikan, 8-25 kitahama-Cho, Takamatsu-Shi, Kagawa Prefecture, Japan - 70 0031 (Representative of the Organization - Mr Ikuhiro HATTORI, President of JF ZENGYOREN & President of Hikita Fisheries Cooperative Association in Kagawa Prefecture)	Mr Katsuhiro YOSHIDA Assistant Chief, Guidance Section. Tel: + 81 (87) 825 0351 Fax: + 81 (87) 851 6310 E-mail: k.yoshida@ kagawa-gyoren.or.jp	• Organization and activities of JF Kagawa-Ken Gyoren • Promotion of Community-based Fisheries Resource Management (CFRM).
15:00 - 17:00	Fisheries Research Institute of Kagawa Prefecture 75-5 Yashima Higashi-Cho, Takamatsu, Kagawa Prefecture, Japan - 761 0111 (Representative of the Organization - Mr Kimiharu URAYAMA, Director).	Mr Kimiharu URAYAMA, Director Tel: + 81 (87) 843 6511 Fax: + 81 (87) 841 8133 E-mail: jy3565@ pref.kagawa.lg.jp	Roles of Fisheries Research Institute of Kagawa Prefecture in implementation of CFRM, and examples of CFRM in the Prefecture.
September 19, 2008 (Friday)			
06:00 - 07:30 & 09:00 - 10:30	JF Aji Fisheries Cooperative Association (JF Aji FCA), 6377-1 Aji-Cho, Takamatsu Kagawa Prefecture, Japan - 761 0130 (Representative of the Organization - Mr Katsuji SHIMANO, Chairman).	Mr Sadamitsu UCHIKOSHI Senior Managing Director. Tel: +81 (87) 871 4131 Fax:+ 81 (87) 871 4749 E-mail: aji-senmu@ kaajigyokyo.jf-net.ne.jp	• Observation of unloading of catch and wholesale marketing of fish. • Briefing on the structure and activities of FCAs in the Prefecture and the CFRM implemented by them.

Date &Time	Organization	Contact person	Activity
14:00 - 16:30	JF Uchinomicho Fisheries Cooperative Association (JF Uchinomicho FCA) 2281-1 Nouma Kou,= Shodoshima-Cho, Shozu-Gun, Kagawa Prefecture, Japan - 761 4421 (Representative of the Organization - Mr Katsusuke MORI, Chairman).	Mr Nobuhiko SHOUNO, Chief of Staff. Tel: + 81 (879) 82 4131 Fax: + 81 (879) 82 0526 E-mail: tac-u@ kauchinomi.jf-net.ne.jp	• Briefing on the structure and activities of FCAs in the Prefecture and the CFRM implemented by them.
September 22, 2008 (Monday)			
10:00 - 12:00	National Research Institute of Fisheries Science (NRIFS) 2-12-4 Fukuura, Kanazawa Yokohama, Kanagawa Prefecture, Japan - 236 8648 (Representative of the Organization - Mr Kiyoshi INOUE, Director).	Mr Kengo Hayakawa, Programme Coordination Officer, Business Promotion Office. Tel: + 81 (45) 788 7615 Fax: + 81 (45) 788 5001	• Organization and research programmes of NRIFS. • Roles of NRIFS in CFRM and some examples of activities implemented in the region.

Notes