

OUTLINE OF REPORT ON VIETNAM SEAFOOD EXPORTS IN Q1.2013

CHAPTER I:

OVERVIEW OF VIETNAM FISHERIES INDUSTRY IN Q1.2013

I. VIETNAM SEAFOOD PRODUCTION AND EXPORTS IN Q1/2013

Summary:

Total seafood export value in Q1/2013, vs the same period of Q1.2012

The number of importing markets.

1. Production

Analyse

Table of fisheries production of Vietnam in Q1.2013 (volume)

Colum graph of fisheries production of Vietnam in Q1.2013 (by monthly)

2. Four main reasons for drop in seafood exports

Seafood exports drop in Q1 for the first time in 4 years.

Graph of seafood exports in Q1 for the period of 5 years (2009 – 2013)

4 reasons:

(1) Unstable sourcing of raw seafood for exports

- Disease on farmed shrimp
- Volatile prices of raw pangasius; Farmers shifting to other crops due to loss in pangasius farming
- Higher input costs affect to fishing, leading to shortage of marine fish for exports.

(2) Lower demand for seafood due to economic crisis in major import markets

(3) Technical and tax barriers from import markets:

- Ethoxyquin testing on shrimp in Japan and South Korea;
- US antidumping review (POR)⁸ on pangasius unfavorable for Vietnamese exporters; Risks of countervailing duty on shrimp are affecting to psychology of farmers and exporters.
- Untruth information on pangasius in some markets reduce consumption (especially in EU)

- Trend of consumption of certified seafood (Retailers require pangasius with ASC certification)

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(4) Many enterprises suspend operation or reduce production scale because of low number of orders, higher costs of production and lack of supportive policies from government.

3. Main exported seafood products

Pie graph on exported seafood products in Q1.2013

Table of exported seafood products in Q1.2013 (by month)

Analyse Vietnam's main exported seafood products: *Shrimp, pangasius, tuna, cephalopod, bivalve mollusk...*

4. Main import markets

List of top 10 markets

Analyse on main importing markets: *US, EU, Japan, China, South Korea...* (Analyse on export trend to these markets, tables of products exported to the markets)

Pie graph on import markets in Q1

Table of top ten import markets by month

3. The number of seafood enterprises in Q1.2013

Table of top 100 Vietnam seafood exporters in Q1.2013 (by export value)

II. IMPORTS OF RAW SEAFOOD FOR PROCESSING AND EXPORTS

Analyse on trend and data of raw seafood import into Vietnam

Pie graph on Vietnam seafood imports from countries

Colum graph on Vietnam monthly seafood imports in Q.2012 – Q1.2013

III. FORECAST FOR VIETNAM SEAFOOD PRODUCTION AND EXPORTS IN 2013

1. Opportunities and challenges of Vietnam seafood industry in 2013

2. Forecast for seafood production and exports in QII.2013

CHAPTER II: PANGASIOUS EXPORTS

Summary:

Total export value in QI/2013, vs the same period of QI.2012

The number of importing markets.

I. OVERVIEW OF PANGASIOUS PRODUCTION AND EXPORTS IN Q1.2013

1. Production

Farming area and output:

Table of raw pangasius production in Q1.2013

Unstable price of raw pangasius

Line chart of prices of raw pangasius in Dong Thap and An Giang in Q1.2013 (by week)

2. The factors affecting to pangasius exports

- (1) Lack of capital for production and export activities
- (2) Problem of quality: Grades of glazing and water content in pangasius fillet...
- (3) Trend of consumption of pangasius with ASC certification and ASC labeling in EU.
- (4) US antidumping duty (especially POR8)

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3. Main import markets

- List of top main markets, proportion in total pangasius exports
- Import trends in main markets: EU, the US, Mexico, Brazil...

Table of pangasius exports by month and market

Pie graph on pangasius export to markets in Q1.2013

The US.:

- Total export value in Q1/2013, vs the same period of Q1.2012
- Pangasius consumption in the US market in Q1.2013

Colum graph on pangasius exports to the US. in Q1.2012 and Q1.2013 (by month)

EU:

- Total export value in Q1/2013, vs the same period of Q1.2012
- Pangasius consumption in EU market in Q1.2013

Pangasius import value in Q1 2013 , vs same period 2012 and consumption trend in Germany, Spain, Netherland and the UK.

Table of pangasius exports to 4 main markets in EU

Colum graph on pangasius exports to the US. in Q1.2012 and Q1.2013 (by month)

Mexico

- Total export value in Q1/2013, vs the same period of Q1.2012

- Pangasius consumption in the Mexico in Q1.2013

Colum graph on pangasius exports to the Mexico in Q1.2012 and Q1.2013 (by month)

Brazil

- Total export value in Q1/2013, vs the same period of Q1.2012

- Pangasius consumption in the Brazil in Q1.2013

Colum graph on pangasius exports to the Brazil in Q1.2012 and Q1.2013 (by month)

China & Hong Kong

- Total export value in Q1/2013, vs the same period of Q1.2012

- Pangasius consumption in China & Hong Kong in Q1.2013

Colum graph on pangasius exports to China & Hong Kong in Q1.2012 and Q1.2013 (by month)

4. Pangasius products

Graph and table of pangasius product by HS code

Analyse:

5. Top 20 pangasius exporters

- Proportion of pangasius value in Q1.2013

- *Table of top 20 exporters*

IV. FORECAST ON PANGASIOUS PRODUCTION AND EXPORTS IN 2013

1. Challenges to Vietnam pangasius industry

2. Forecast on pangasius production

3. Forecast on pangasius export

CHAPTER III. SHRIMP EXPORTS

I. OVERVIEW OF SHRIMP PRODUCTION AND EXPORTS

Summary:

Total export value in Q1/2013, vs the same period of Q1.2012

The number of importing markets.

1. Production

- Shrimp production in Q1.2013, vs the same period of 2012

- Shrimp farming area
- Disease affected area
- Prices of raw shrimp in Q1, vs 2012
- *Line graph of raw shrimp prices in Ca Mau in Q1/2013 (by week)*

2. Five factors affecting to shrimp exports (Analyse)

- (1) Disease on farmed shrimp leading to shortage of raw material
- (2) Low demand in the markets
- (3) Ethoxyquin barriers
- (4) CVD case
- (5) Lack of capital for production and exports

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3. Exported shrimp products

Graph and table of pangasius product by HS code

Analyse:

3. Main import markets

- List of top main markets, proportion in total pangasius exports
- Import trends in main markets: EU, the US, Japan, China, South Korea...

Table of shrimp exports by month and market

Pie graph on shrimp export to markets in Q1.2013

Table of top 10 import markets for black tiger shrimp by month

Table of top 10 import markets for whiteleg shrimp by month

The US:

- Total export value in Q1/2013, vs the same period of Q1.2012
- Shrimp consumption in the US market in Q1.2013
- Analyse on rivals in the US market

Colum graph on shrimp exports to the US. in Q1.2012 and Q1.2013 (by month)

EU:

- Total export value in Q1/2013, vs the same period of Q1.2012
- Shrimp consumption in the EU market in Q1.2013

- Analyse on rivals in the EU market

Colum graph on shrimp exports to the EU in QI.2012 and QI.2013 (by month)

Table of shrimp exports to EU and 4 main countries in the block

South Korea

Total export value in QI/2013, vs the same period of QI.2012

- Shrimp consumption in the South Korea in QI.2013

Colum graph on shrimp exports to South Korea in QI.2012 and QI.2013 (by month)

China & Hong Kong

Total export value in QI/2013, vs the same period of QI.2012

- Shrimp consumption in the China & Hong Kong

in QI.2013

Colum graph on shrimp exports to China & Hong Kong in QI.2012 and QI.2013 (by month)

ASEAN

Total export value in QI/2013, vs the same period of QI.2012

Colum graph on shrimp exports to China & Hong Kong in QI.2012 and QI.2013 (by month)

5. Top 20 shrimp exporters

- Proportion of export value ?

- *Table of top 20 exporters*

II. FORECAST ON PANGASIUS PRODUCTION AND EXPORTS IN QII. 2013

1. Challenges for shrimp industry in QII/2013

2. Forecast on production of raw shrimp

3. Forecast on shrimp exports

CHAPTER IV. MARINE PRODUCT EXPORTS

Summary:

Total export value in QI/2013, vs the same period of QI.2012

I. OVERVIEW ON PRODUCTION AND EXPORT OF MARINE PRODUCTS IN QI.2013

1. Raw material production

Analyse

Graph of Vietnam marine catch production in Q1.2013 (by month)

2. Exports

Analyse

Graph of Vietnam marine exports in Q1.2013 (monthly)

Table of Vietnamese marine product export in Q1.2013 (quartly)

3. Difficulties in marine product production and export in Q1.2013

- Shortage of raw material
- Quality of catching products not eligible for exports
- Tight procedures and high tax on import of raw material for processing and export.
- Lower demand in the world market.

II. MARINE PRODUCT EXPORT

1. Tuna export

Analyse

Graph of Vietnam tuna exports in Q1.2013 (monthly)

Table of Vietnamese tuna product export in Q1.2013 (by month)

Exported tuna products by HS code

Graph and table of tuna product by HS code

Analyse:

Key markets of Vietnamese tuna

List of top 10 biggest markets, proportion in total value of tuna export...

Table of tuna exports to main market (by month)

Analyse

The U.S

- Tuna export value in Q1.2013, vs 2012? ...
- Tuna products exported to the U.S (by HS code)
- Trend of the market
- Rivals exporting to the US.

Analyse

Graph of Vietnam tuna exports to the U.S in Q1.2012 - Q1.2013 (monthly)

The EU

- Tuna export value in Q1.2013, vs 2012? ...
- Tuna products exported to EU (by HS code)
- Trend of the market
- Rivals exporting to the EU.

Analyse

Graph of Vietnam tuna exports to EU in Q1.2012 - Q1.2013 (monthly)

Japan:

- Tuna export value in Q1.2013, vs 2012? ...
- Tuna products exported to Japan (by HS code)
- Trend of the market
- Rivals exporting to Japan.

Analyse

Graph of Vietnam tuna exports to Japan in Q1.2012 - Q1.2013 (monthly)

South Korea

- Tuna export value in Q1.2013, vs 2012? ...
- Tuna products exported to South Korea (by HS code)
- Trend of the market
- Rivals exporting to South Korea.

Analyse

Graph of Vietnam tuna exports to South Korea in Q1.2012 - Q1.2013 (monthly)

Top ten tuna exporters

Table of top ten tuna exporters

2. Cephalopod

- Cephalopod export value in Q1. 2013, vs 2012
- Numbers of import markets

Graph of Vietnam cephalopod exports in Q1.2013 (monthly)

Exported cephalopod exports by HS code

Graph and table of cephalopod product by HS code

Analyse:

Main importing markets

List of top 10 import markets, proportion of value

Table of cephalopod exports to main markets in Q1.2013 (by month)

Analyse

Table of Vietnamese squid and cuttle fish exports to main markets in Q1.2013 (monthly)

Table of Vietnamese octopus exports to main markets in Q1.2013 (monthly)

South Korea

- Export value in Q1. 2013, vs 2012?
- products exported to South Korea (by HS code)
- Trend of the market
- Rivals exporting to South Korea.

Analyse

Graph of Vietnam cephalopod exports to South Korea in Q1.2012 - Q1.2013 (monthly)

The U.S.

- Export value in Q1. 2013, vs 2012?
- products exported to the U.S (by HS code)
- Trend of the market
- Rivals exporting to the US.

Analyse

Graph of Vietnam cephalopod exports to the US in Q1.2012 - Q1.2013 (monthly)

EU:

- Export value in Q1. 2013, vs 2012?
- products exported to the EU (by HS code)
- Trend of the market
- Rivals exporting to the EU.

Analyse

Graph of Vietnam cephalopod exports to EU in Q1.2012 - Q1.2013 (monthly)

Japan:

- Export value in Q1. 2013, vs 2012?
- products exported to Japan (by HS code)
- Trend of the market
- Rivals exporting to Japan.

Analyse

Graph of Vietnam cephalopod exports to Japan in Q1.2012 - Q1.2013 (monthly)

3. Bivalve mollusk products

Analyse

Graph of Vietnam bivalve mollusk exports in Q1.2013 (monthly)

4. Crab, swimming crab and other crustaceans

Analyse

Graph of Vietnam crab exports in Q1.2013 (monthly)

5. Surimi and other marine fish products

Analyse

II. TREND OF MARINE FISH SECTOR IN QII. 2013

1. Challenges to the sector in QII.2013

Analyse

2. Forecast on marine product export in QII.2013

Tuna

Cephalopod

Bivalve mollusk

Fish paste and surimi, crab and other crustacean