

Global Markets, Trends and Opportunities for Tilapia from Vietnam

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Our goal today:

Explore international and domestic factors influencing the Vietnamese tilapia industry

- Producing countries and corresponding markets
- Trends impacting the tilapia industry
- Opportunities for the Vietnamese tilapia industry

How to achieve growth objectives?

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	<p>Tilapia Growth Objectives In Viet Nam:</p> <p>2015 objective: Farming area - 21,000 ha Production - 140,000 mt Exports – 50,000 mt</p> <p>2020 objective: Farming area – 25,000 ha Production – 200,000 mt Exports – 80,000 mt</p> <p>Source: Globefish</p>
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	<p>Markets</p>
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Primary Producing Countries:



Image Source: http://www.nationsonline.org/oneworld/continents_map.htm

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Secondary Producing Countries:

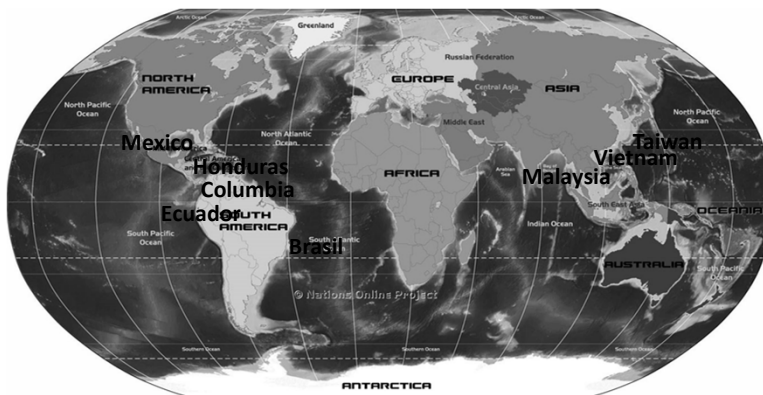
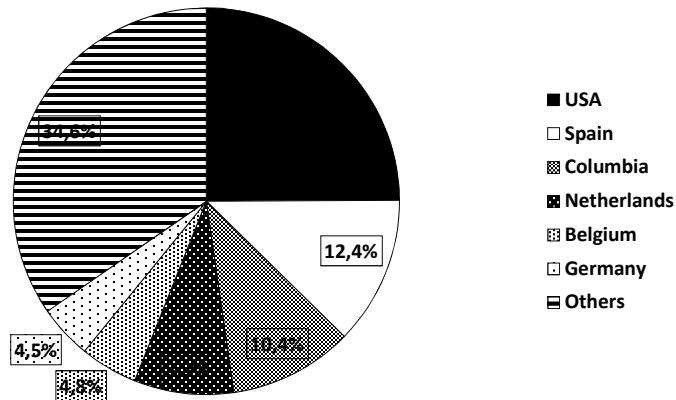


Image Source: http://www.nationsonline.org/oneworld/continents_map.htm

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Major Vietnamese Markets 2014

2014 production was 125,000 mt



Source: ASEAN Seafood VOL 2 ISSUE 3 MAY/Jun 2015 p. 90

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European Market



- Geographically: 50 nations
- Demographically: Over 740 million
- Economically: Strong and weak performers
- Culturally Diverse: Different seafood preferences and per capita consumptions
- Tilapia imports 44,800 mt in 2013 (CBI)

Image Source: <http://www.mapsofworld.com/flags/european-union/>

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North America (USA)



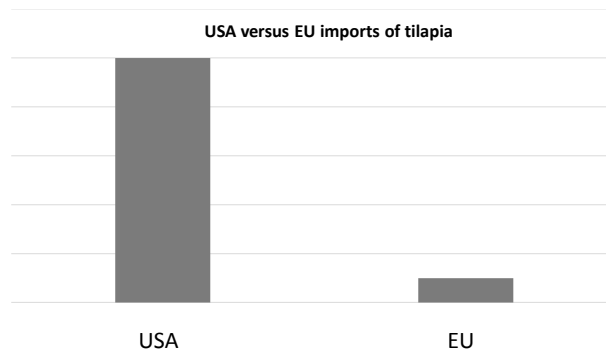
- Population of 321.5 million (US Census)
- Per capita consumption of 14.5 lbs in 2013 (NFI)
- Tilapia #4 consumed fish a growth of 181% since 2003 (NFI)

Image Source: <http://www.amazon.com/Graphic-Design-Picture-Sticker-Vinyl/dp/BooDGLAZBE>

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North America (USA)

The USA imported 10 times more tilapia than the EU in 2012



Source: CBI

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Major Market Segments

Grocery And Club

FRESH Regal Springs Tilapia From Honduras And Mexico Is Available At Most:



Source: <http://www.regalsprings.com/where-to-buy/>

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Major Market Segments

FROZEN Regal Springs Tilapia From Mexico And Indonesia Is Available At Most:



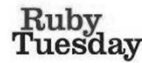
Source: <http://www.regalsprings.com/where-to-buy/>

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Major Market Segments

Restaurants

Regal Springs Tilapia Is Available At Most:



Source: <http://www.regalsprings.com/where-to-buy/>

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Trends

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Overarching Market Concern

Primary concern is protecting reputation:



Image Source: <http://www.co-operative.coop/corporate/aboutus/>

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Overarching Market Concern

Retailer supply chains constitute a financial and reputational risk which must be managed.

thestar.com
WORLD

News / World

Bangladesh factory-collapse workers, families seek \$2 billion from Loblaw

Canadian grocery giant believes proposed class-action lawsuit in 2013 building collapse at Dhaka-area clothing facility "without merit."

Source: <http://www.thestar.com/news/world/2015/04/30/bangladesh-factory-collapse-workers-families-seek-2-billion-from-loblaw.html>

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Overarching Market Concern

This also includes aquaculture food safety risks.



U.S. Food and Drug Administration
Protecting and Promoting Your Health

(Note: This import alert represents the Agency's current guidance to FDA field personnel regarding the manufacturer(s) and/or product(s) at issue. It does not create or confer any rights for or on any person, and does not operate to bind FDA or the public).

Import Alert # 16-131

Published Date: 05/07/2015

Type: DWPE

Import Alert Name:

"Detention Without Physical Examination of Aquacultured Catfish, Basa, Shrimp, Dace, and Eel from China- Presence of New Animal Drugs and/or Unsafe Food Additives"

Reason for Alert:

There has been extensive commercialization and increased consumption of aquaculture seafood products worldwide. Aquacultured seafood has become the fastest growing sector of the world food economy, accounting for approximately half of all seafood production worldwide. Approximately 80% of the seafood consumed in the U.S. is imported from approximately 62 countries. Over 40% of that seafood comes from aquaculture operations. As the aquaculture industry continues to grow and compete with wild-caught seafood products, concerns regarding the use of unapproved animal drugs and unsafe chemicals and the misuse of animal drugs in aquaculture operations have increased substantially.

Source http://www.accessdata.fda.gov/cms_ia/importalert_33.html

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Overarching Market Objective

Building Brand Identity and Credibility:



Poissonnerie



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Product Differentiation



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Product Differentiation



The Blue Planet requirements for farmed fish are:

- The fish must come from producer which has its own, independently certified farm site;
- Producer must comply to the highest quality requirements;
- Production is exclusively at certified processing plants with established traceability;
- Quality controllers are employed to inspect and supervise production and to draw up quality reports. These controllers also ensure the end product is always analysed at accredited laboratories.

Source: <http://www.seafoodconnection.nl/en/sustainability/blue-planet>

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Product Differentiation



Tropical Tilapia is free of
chemicals, antibiotics,
growth promoters and
carbon monoxide.

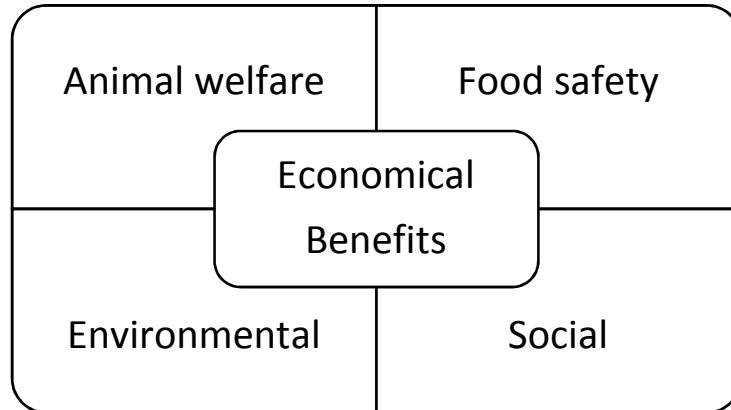
Source: <http://http://www.eattilapia.com/cms/wp-content/uploads/2013/04/Tropical-Tilapia.pdf>

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Opportunities/Concluding thoughts

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Opportunities to Reduce Downstream Risk



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Opportunities to learn from Pangasius

- Policy - Decree 36 & VietGAP
- Production – supply & demand
- Processing - quality
- Promotion - differentiation

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Branding Opportunities



— ECUADOR —
FIRST CLASS SHRIMP
IN PRODUCTION SINCE 1969
AND STILL GROWING



Wild, Natural & Sustainable®



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Cảm ơn

Contact: carsonroper@hotmail.com

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Additional Resources

- Slide 17
 - <http://www.seafoodnews.com/Story/972398/Birds-Eyes-Fish-Finger-Brand-Iglo-to-be-Sold-to-Nomad-Foods-in-US2-point-8-Billion-Deal>
 - <http://your.asda.com/about-asda/webcams>
 - <http://www.rewe.de/nachhaltigkeit2013/gruene-produkte/pro-planet.html>
 - <http://www.carrefour.fr/les-produits/les-produits-carrefour-sans-ogm>

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