



Challenges and solutions for responsible sourcing of fishmeal & fish oil in Vietnam

Prepared by:

1. Kim Thanh NGUYEN – Kim Delta Co., Ltd
2. Iain POLLARD - Key Traceability

Guangzhou, September 19, 2016

CONTENT

1. A glance at the roundtable of feed manufacturers and fishmeal producers in Vietnam
2. Roundtable stakeholders
3. Objectives of the initiative
4. Update on the progress after Brussels 2016 dialogue
5. Challenges of Fishery Improvement Projects (FIPs) in Vietnam from the view of the feed manufacturers and fishmeal producers
6. Support needed to make FIPs work in Vietnam



1. The roundtable in Vietnam



1. The roundtable in Vietnam

- ❖ Initial concept during Brussels 2016 dialogue: The roundtable of aquaculture feed supply chain is where feed manufacturers together with their suppliers – components of the chain – voluntarily and equally discuss about industry-wide issues.
- ❖ Latest concept: the roundtable is where all links of the fishery supply chain voluntarily and equally address the sustainable issues of the fishery.

WHY?

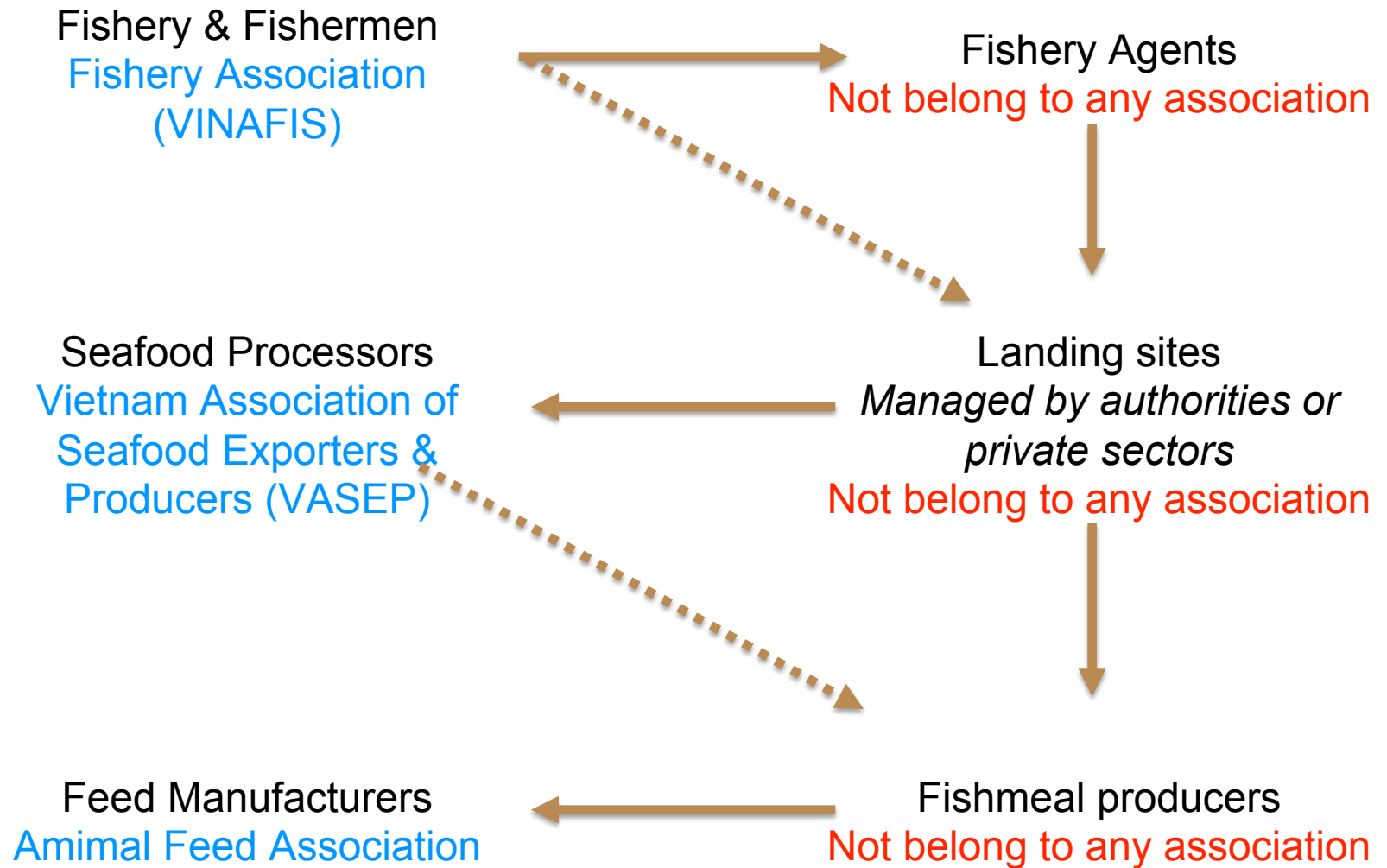


1. The roundtable in Vietnam

Fishmeal production represents about only 30% of total fishing yield



1. The roundtable in Vietnam



1. The roundtable in Vietnam

Members of the roundtable:

Feed manufacturers: 06

Fishmeal producers: 06

CAB: 03



1. The roundtable in Vietnam

Potential members:

- ❖ Invivo NSA Vietnam (Feed Manufacturer)
- ❖ Pilmico – Vinh Hoan Feed
- ❖ Uni-President (Feed Manufacturer)
- ❖ Truong Hai Fish Meal
- ❖ Viet Nam Sea farm Association
- ❖ VSP International Seafood Service & Consulting Co., Ltd



2. Roundtable stakeholders



Local authority and Directory of Fishery of Vietnam / MARD: support legislation framework



The connector between public and private sectors



The main factor of the project that has the most influence of the sustainability of the supply chain.



The second target beneficiary of the project as they also share fishery resources from the area.



2. Roundtable stakeholders



The second target beneficiary of the project who have direct benefits from fishmeal producers related to their fully compliance with responsible feed manufacturing standards

The forming Vietnam association of fishmeal & fish oil producers – the first target beneficiary of the project



Independent progress verifiers



2. Roundtable stakeholders



FISH MATTER



The facilitator/project coordinator, connect Vietnamese producers with international standard holders and NGOs. Support to plan the roadmap toward IFFO for the fishmeal producers

KimDelta
For a sustainable development



RS STANDARDS
RESPONSIBLE SOURCING

Conduct the fishery assessment and gap analysis



The mutual agreement to recognise the FIP Vung Tau as interim, and IFFO as destination for responsible sourcing of fishmeal from fishery

Global Aquaculture Alliance™

ASC Aquaculture Stewardship Council




GLOBAL G.A.P.

KimDelta



3. Objectives of the roundtable in Vietnam

- 
1. Establish what information is available on fishery management and performance
 2. Conduct assessments and identify the critical regulations needed for sustainable fisheries
 3. Mapping fisheries, landing sites, fishers, supply chains and areas of influence
 4. Initiate FIPs: Stakeholders to work on implementing improvements
 5. Monitor progress of the FIPs via the Roundtable and provide support for successful implementation
 6. IFFO RS and MSC certification



4. How to achieve the objectives? Roundtable Strategy

- ❖ There is a need for all stakeholders to recognise and accept that the current situation is not ideal and commit to continuous improvement in order to solve them
- ❖ An inclusive group of stakeholders collaborate in a participatory approach
- ❖ Stakeholders agree to sign a Participant Agreement that sets out these responsibilities and assigns tasks
- ❖ Information on fisheries is shared publicly and the Roundtable is transparent in its operations (website)
- ❖ Following a logical approach to identify fishery needs support improvements in those fisheries (i.e. FIPs), report progress publicly and at roundtable meetings, d) Get IFFO certified or MSC certified when ready.



5. Activities

1. Providing technical support regarding to:

- Multi-species fishery assessment
- Develop management plans tailored for Viet Nam conditions
- Traceability along the whole fishery supply chain
- Fishing technology

2. Providing social solutions:

- Working conditions of crew
- Income of fishermen
- Convert livelihood for fishermen communities
- Engagement of the whole supply chain.



6. Post-Brussels 2016 dialogue

Second dialogue with relevant stakeholders and Ministry of Agriculture & Rural Development (MARD) was held in Vung Tau – where 3rd FIP of Vietnam planned to be run – on June 24, 2016:

Participants:

Representatives of:

- MARD: Wild Capture Department – Directorate of Fishery
- Provincial authorities: Committee of People, Agriculture & Rural Development Department, Party Committee
- Others: Vietnam Chamber of Commerce & Industry of Vung Tau, Fish Matter, GAA, Control Union, Bureau Veritas, SGS Vietnam feed manufacturers, fishermen, fish producers, television and newspapers



6. Post-Brussels 2016 dialogue

Content:

- Update about:
 - Opportunities and challenges of fishery of Vietnam regarding to traceability and quality once free trade agreements are in valid
 - International conventions about marine resources preservation that Viet Nam is one of members.
 - Status of fishery in Vietnam and challenges for the management
 - Government policies and legislations in restructure for better management as well as support the fishery toward sustainability and protect fishery resources.



6. Post-Brussels 2016 dialogue

- About Vung Tau:
 - Translocation for fishery processing for about 160 companies, accompanied by landing sites and other associated services.
 - Holding more workshops to communicate with producers and fishermen about international market requirements related to traceability, sustainability and responsibility.
 - The committee agreed to form the association of fishmeal producers in Vung Tau.
 - Review fishery stock and allocate quantity of fishmeal plants in the province accordingly.



6. Post-Brussels 2016 dialogue



6. Post-Brussels 2016 dialogue



6. Post-Brussels 2016 dialogue

Meeting with feed manufacturers and fishmeal producers on July 13, 2016 in Ho Chi Minh City

Content:

- Agree about forming Vietnam Association of Fishmeal & Fish Oil producers (*in process*)
- Roadmap for FIP Vung Tau
- Stakeholder mapping
- FIP management structure
- Budget to conduct the fishery assessment & gap analysis and working plans, estimate about \$100,000.



6. Post-Brussels 2016 dialogue



7. Our challenges

- Database regarding stock assessment are not available
- Responsible fishery standard like MSC or responsible sourcing standard like IFFO RS have been working on multi-species fishery that is typical for Vietnam (and South East Asia)
- Traceability along the fishery supply chain requests collaboration of every single link, relevant authorities and more national/international expertise.
- Upgrade fishing vessels and post-harvest technology
- Convert livelihood for fishermen communities in order to reduce fishing intensity



7. Our challenges



8. Support for FIPs



Thank you

