



# Regional Fisheries Livelihoods Programme for South and Southeast Asia (RFLP)

GCP/RAS/237/SPA



## Viet Nam

A visual guide of key baseline survey findings

# About RFLP

The Regional Fisheries Livelihoods Programme for South and Southeast Asia (RFLP) sets out to strengthen capacity among participating small-scale fishing communities and their supporting institutions in Cambodia, Indonesia, the Philippines, Sri Lanka, Timor-Leste and Viet Nam. By doing so, RFLP seeks to improve the livelihoods of fishers and their families while fostering more sustainable fisheries resources management practices.

Funded by the Kingdom of Spain, the four-year (2009 - 2013) RFLP is implemented by the Food and Agriculture Organization of the United Nations (FAO) working in close collaboration with national authorities in participating countries.

RFLP focuses on a number of key areas as follows:

- Strengthening **co-management** mechanisms for sustainable utilization of fishery resources
- Improving **safety at sea** and reducing vulnerability for fishers and communities
- Improving the quality of fishery **post harvest** products and market chains
- Strengthening and diversifying **livelihood** income opportunities for fisher families
- Facilitating better access to **micro-finance** services
- Sharing knowledge and lessons learned both nationally and regionally

## RFLP in Viet Nam

RFLP activities in Viet Nam take place in Quang Tri, Quang Nam and Thua Thien Hue. These provinces are characterized by increasing fishing effort but stagnant, and in some cases reduced, fish production. Fishing communities are not strongly organized while health and quality standards of fishery products are often low. The implementing agency is the Fisheries Administration of The Ministry of Agriculture and Rural Development (MARD) meanwhile the RFLP project Coordination Office is located in Hue City.



## The Viet Nam baseline survey

The RFLP Viet Nam baseline survey was carried out from October 2010 to May 2011. It was conducted in sixteen RFLP target communes and three control communes in Quang Tri, Thua Thien Hue, and Quang Nam provinces. Methods used included household surveys, group discussions and key informant interviews.

The full version of the baseline survey can be downloaded from: [www.rflp.org](http://www.rflp.org)

# Socio-economic background



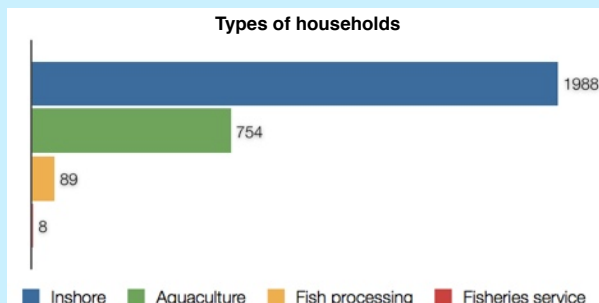
## Quang Tri

75 km coastline (two estuaries: Cua Tung and Cua Viet)  
 Total fish production (2010): 17,500 tons

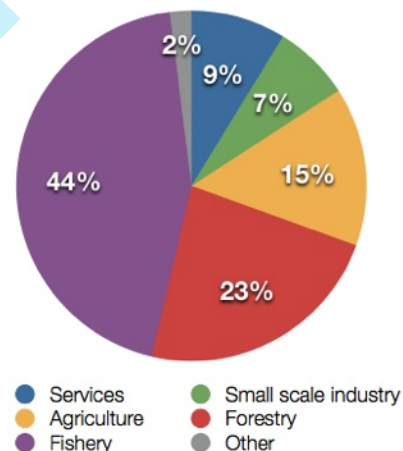
Number of villages: 33  
 Number of fishing villages: 20  
 Number of households: 4,861  
 % of poor households: 20,9 \*

### Popular species:

- ▶ Tiger prawn (*Penaeus spp.*)
- ▶ Cuttlefish (*Sepia spp.*)
- ▶ Greater amberjack (*Seriola dumerili*)
- ▶ Sea cucumber (*Holothuria spp.*)



Quang Tri labour distribution

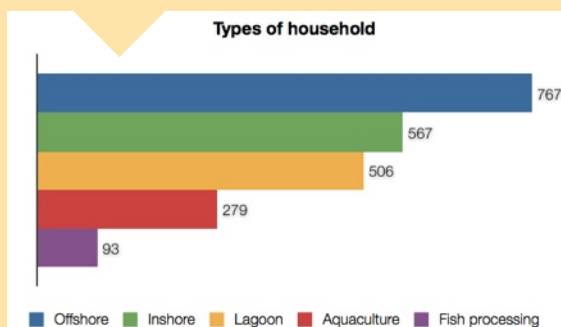


## Thua Thien Hue

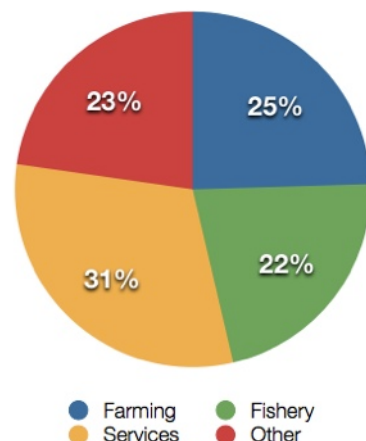
Over 100 km coastline (22,000 ha of lagoon and 4,000 ha of brackish water aquaculture)  
 Total fish production (2009): 39,926 tons (72% of total production from capture fisheries)

No. of villages: 32  
 No. of fishing villages: 19  
 No. of Households: 9,413  
 % of poor households: 9 \*

From 2000 to 2005 the GDP contribution of fisheries increased from nearly 19% to 22%. However, the contribution of fisheries to province GDP declined dramatically after 2006, due to large scale disease outbreaks which caused significant losses in shrimp culture.



Thua Thien Hue labour distribution



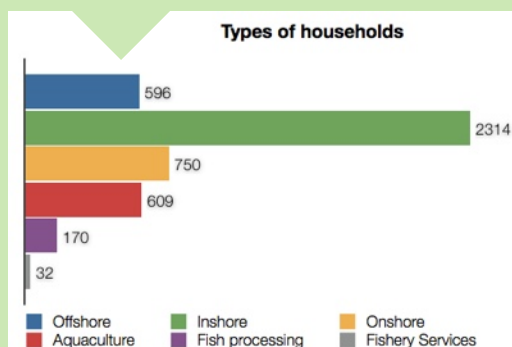
## Quang Nam

Most boats have engines less than 20 HP (68%)  
 Total fish production (2010): 57,600 ton (5% higher than 2009)

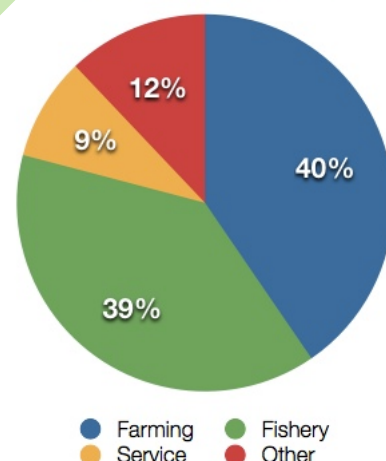
Number of villages: 48  
 Number of fishing villages: 27  
 Number of Households: 15,253  
 % of poor households: 24.8 \*

### Production in tons (2009)

Fishery: 54,836  
 Aquaculture: 16,812



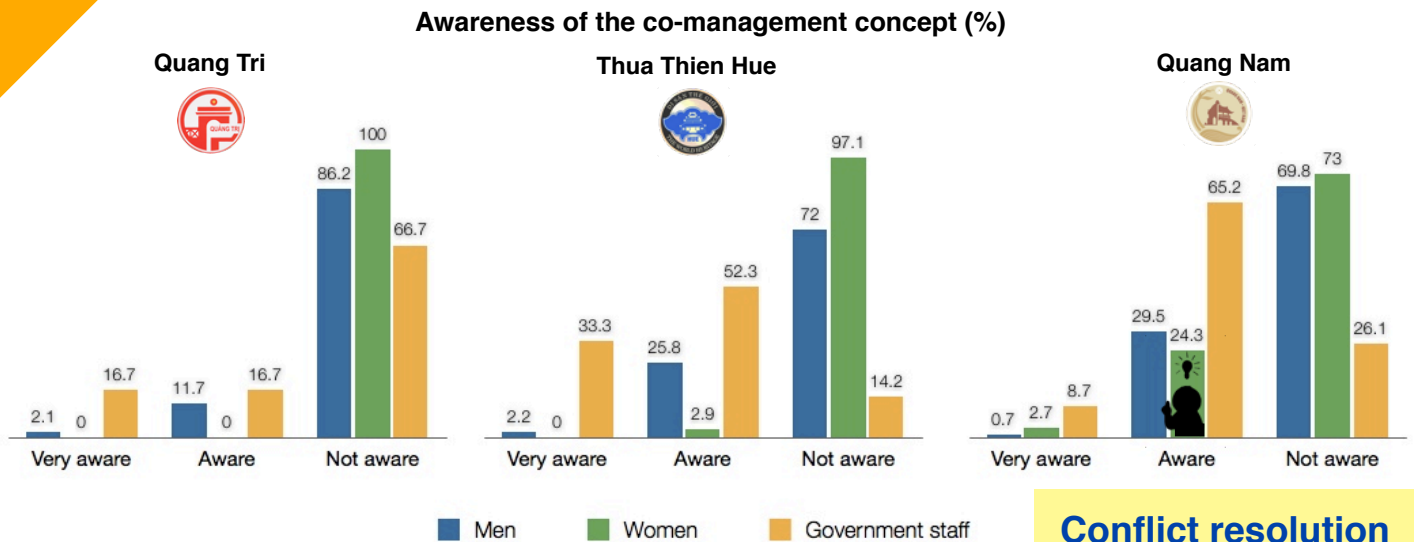
Quang Nam labour distribution



\* The MOLISA definition of 'poor' are households with an average monthly income of less than 200,000 VND per person.

# Co-management

Throughout the three study areas many respondents are generally unaware of the co-management concept and its potential usefulness in fisheries management. Females are particularly unaware.

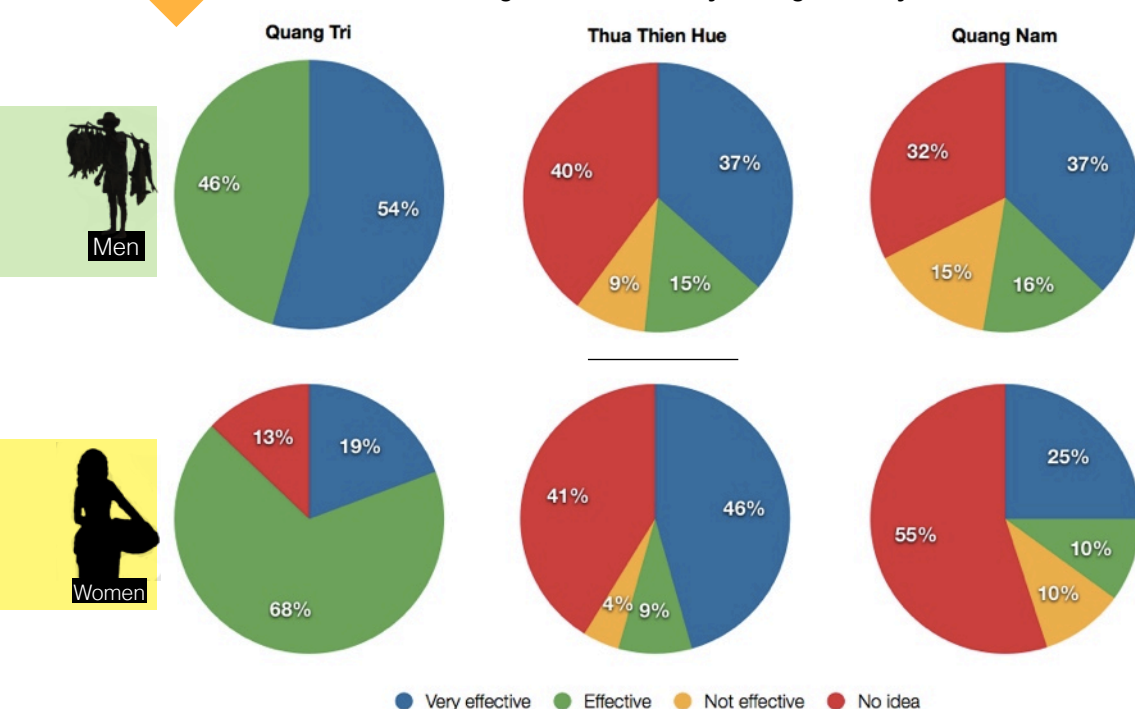


**Conflict resolution**

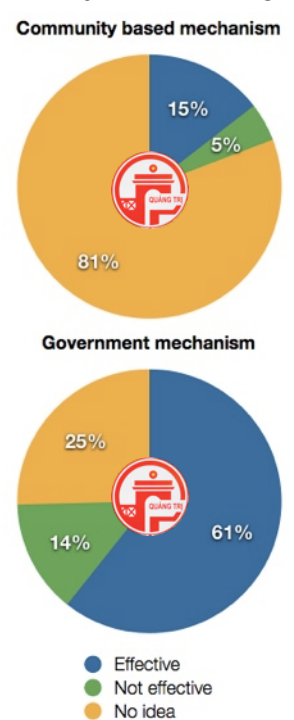
In **Quang Tri**, fishers believe that government mechanisms are more effective than community based approaches in solving conflicts. In **Quang Nam** and **Thua Thien Hue**, fishers believe that both mechanisms are equally effective in solving conflicts.

Respondents declare that the government is heavily responsible for fisheries management and policy. Both men and women claim that government efforts are more effective compared to community-based management mechanisms.

**Effectiveness of government fishery management systems**



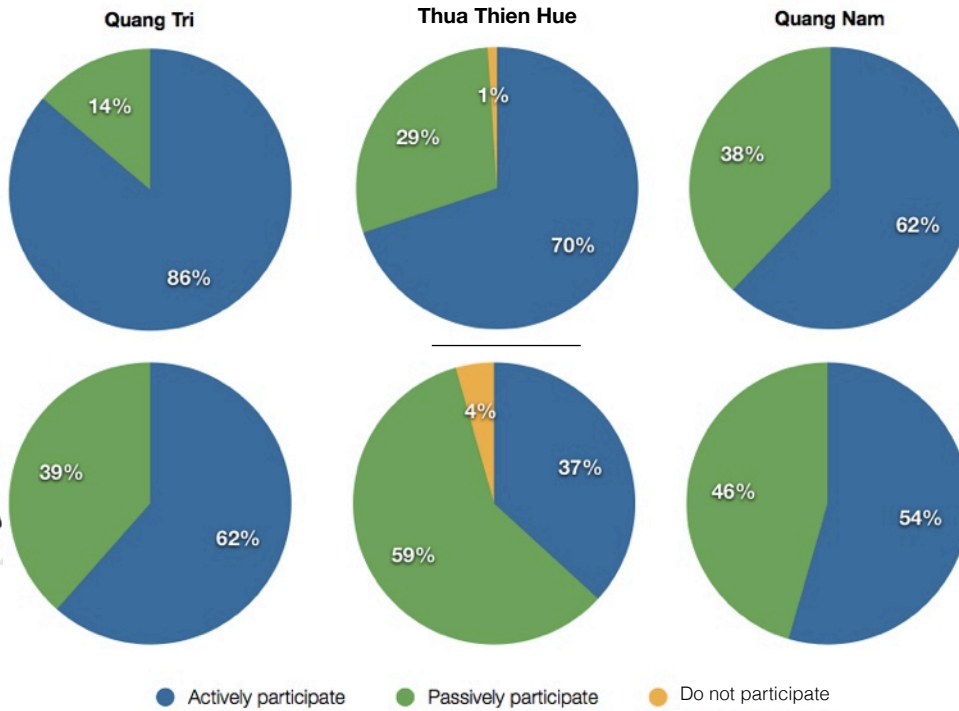
**Effectiveness of conflict resolution systems in Quang Tri**



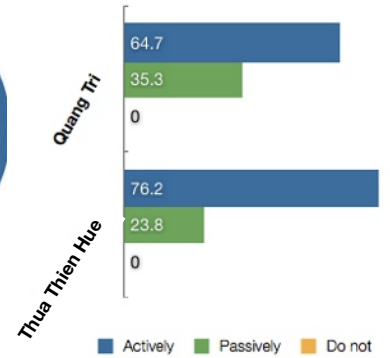


Both men and women are active in fisheries management meetings. Fishers declare that government staff and officials also actively participate in fisheries management meetings.

Stakeholder participation in fishery management meetings



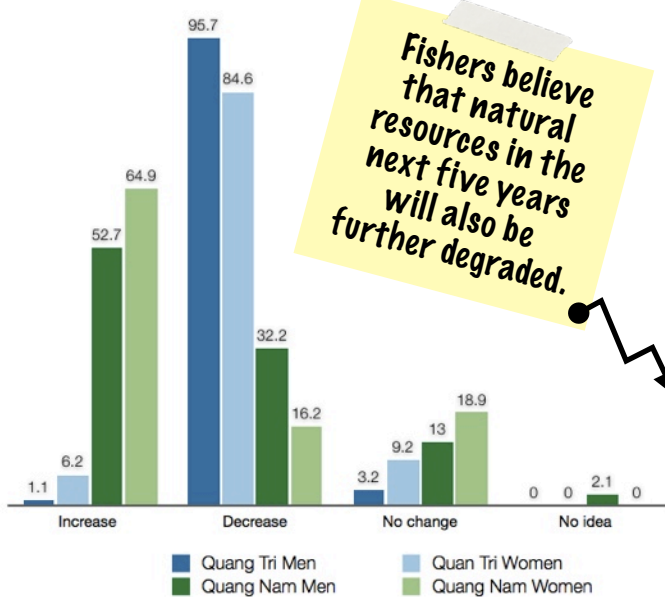
Fishers perception on the extent of government participation in fisheries meetings (%)



In **Quang Tri** and **Thua Thien Hue**, respondents declare that government officers actively participate in fisheries management meetings.

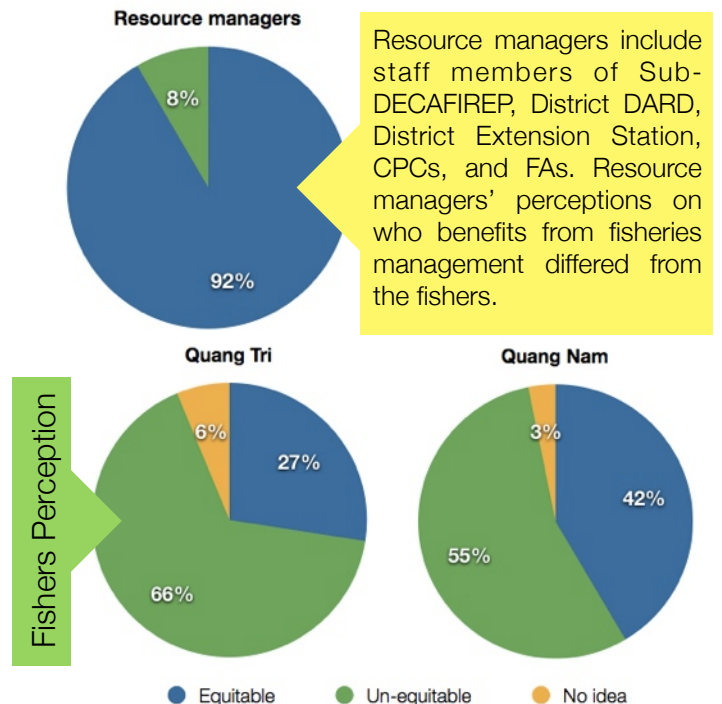
Fishers mainly believe fish catches have decreased over the past five years and that fisheries resources are somewhat unevenly managed and exploited amongst different user groups.

Perception on the state of natural resources in the past five years (%) - examples from Quang Tri and Quang Nam



*Fishers believe that natural resources in the next five years will also be further degraded.*

Perception on the benefits distribution of fisheries resources - examples from Quang Tri and Quang Nam

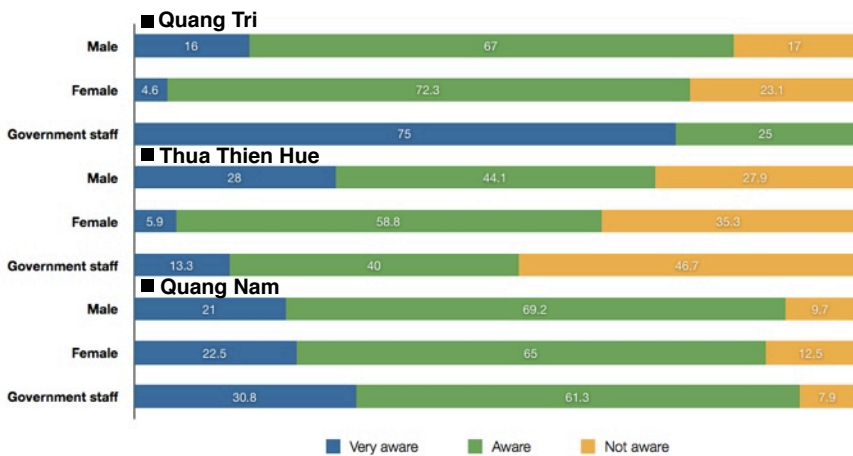


Resource managers include staff members of Sub-DECAFIREP, District DARD, District Extension Station, CPCs, and FAs. Resource managers' perceptions on who benefits from fisheries management differed from the fishers.

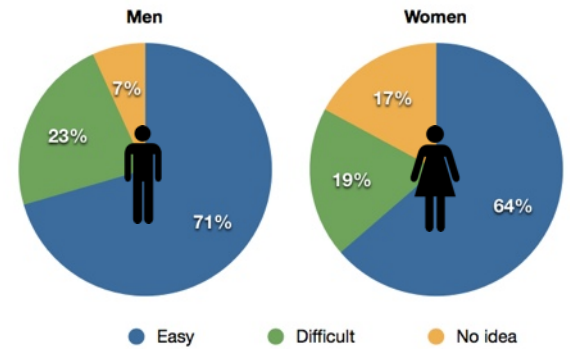
# Safety at Sea

Most fisher households are aware of safety at sea issues and stated that it was easy to access information on safety.

**Awareness on safety at sea information and regulations (%)**

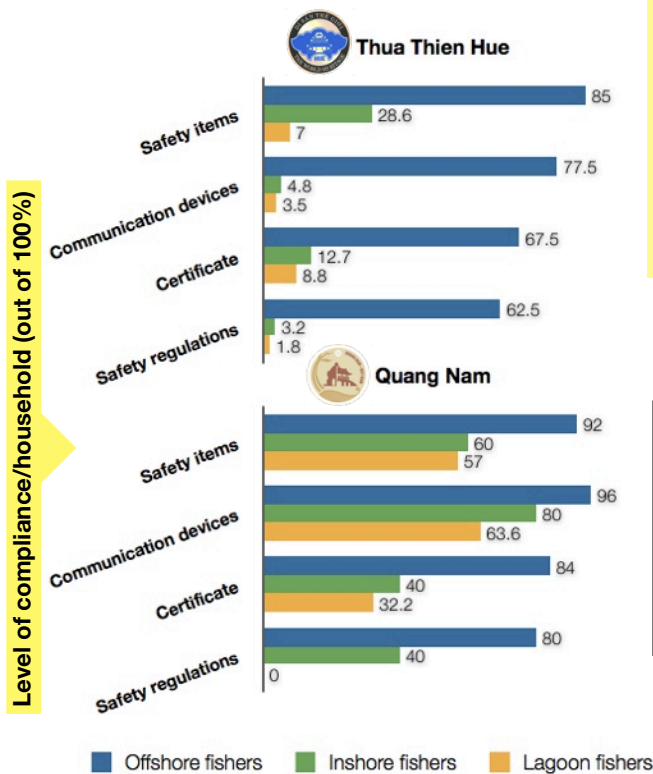


**Average perception on access to safety at sea information**



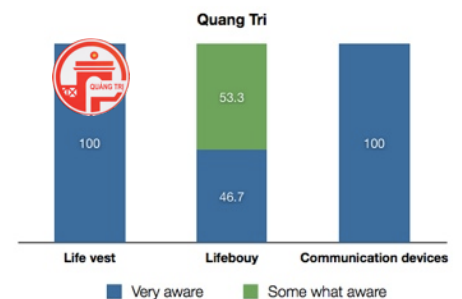
Despite most fishers being aware of safety at sea issues and equipment, actual compliance rates were low in obeying regulations on lifebuoys, first aid kits, and boat registration/inspection.

**Compliance with safety at sea regulations (%) - examples from Thua Thien Hue and Quang Nam**

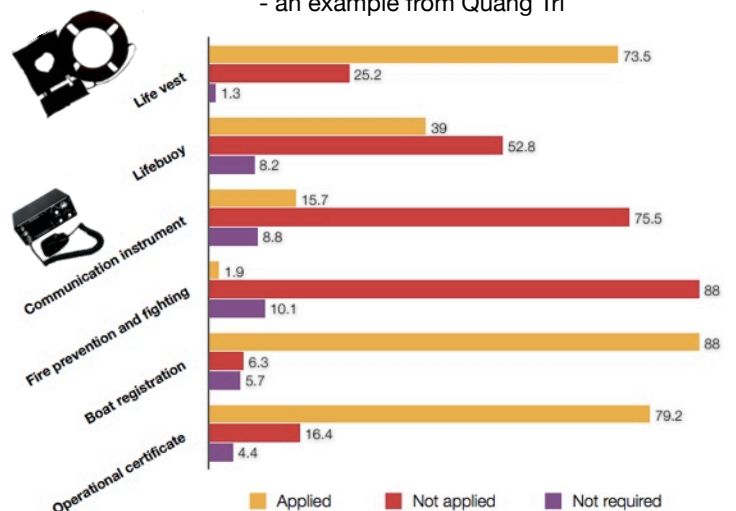


In **Thua Thien Hue**, inshore and lagoon fishers' awareness of regulations and usage of safety equipment was very low. However, offshore fishers throughout the three study areas were more aware and complied more readily with safety at sea measures.

**Awareness of basic safety equipment while fishing at sea (%)**



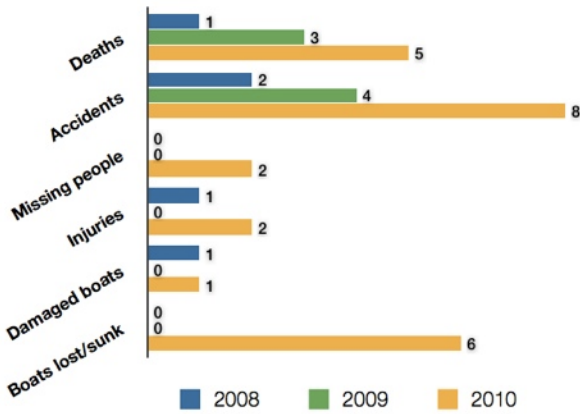
**Fishers' compliance with safety at sea regulations - an example from Quang Tri**



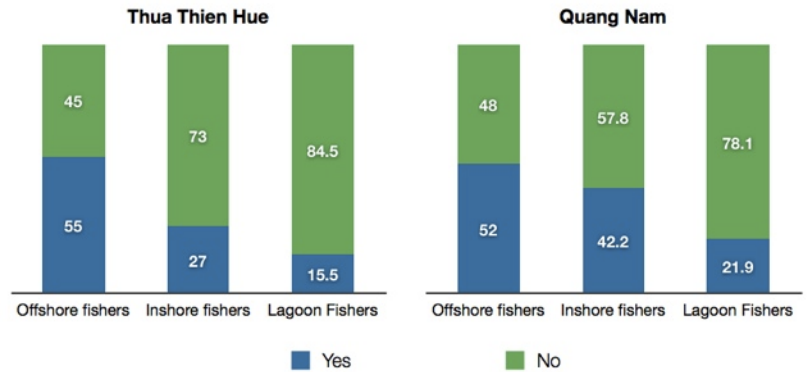
Deaths and accidents have increased over the years and despite expressing confidence at avoiding accidents few fishers have participated in safety training courses.



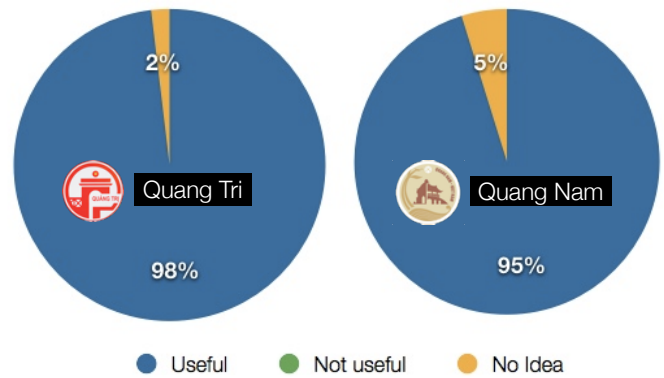
**Safety at sea incidents in Thua Thien Hue**



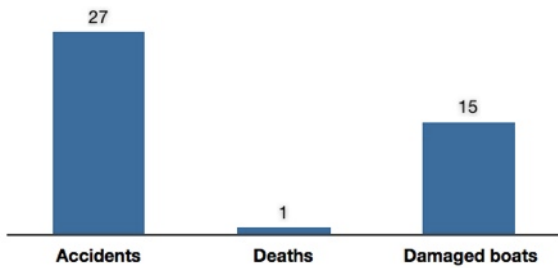
**Fisher's participation in safety at sea training (%) - examples from Thua Thien Hue and Quang Nam**



**Fishers' assessment of the usefulness of safety at sea information**



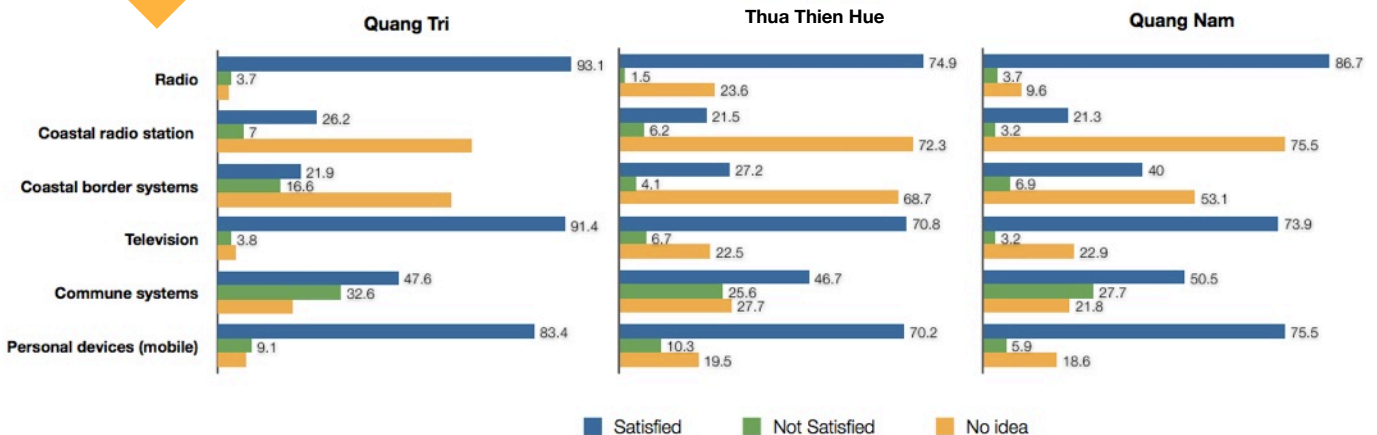
**Safety at sea incidents in Quang Tri (within the last 5 years)**



Inshore and lagoon fishers had lower knowledge of and compliance with safety measures. In addition, women had lower awareness of safety at sea issues than men.

Information channels such as radio, TV, loudspeakers, broadcast systems and cell phones provide quick and reliable information to fishers with many of them appreciating this information.

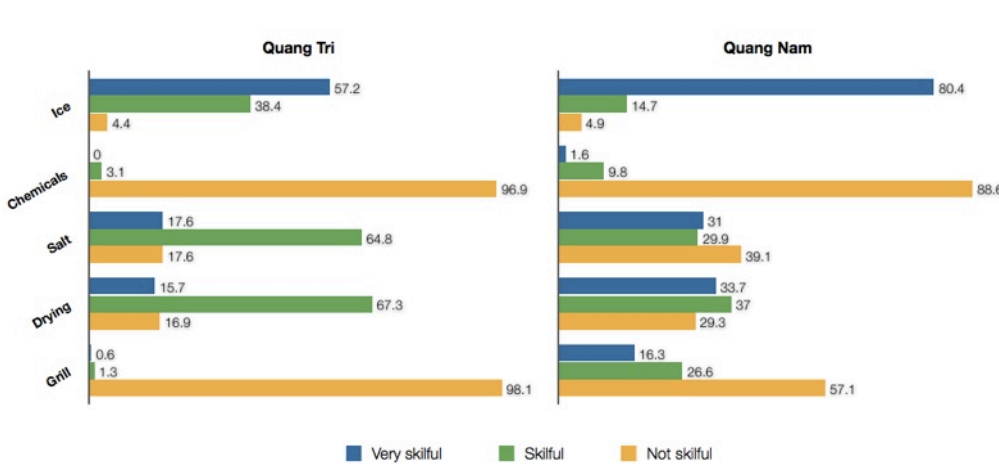
**Fishers' satisfaction with safety at sea channels and information (%)**



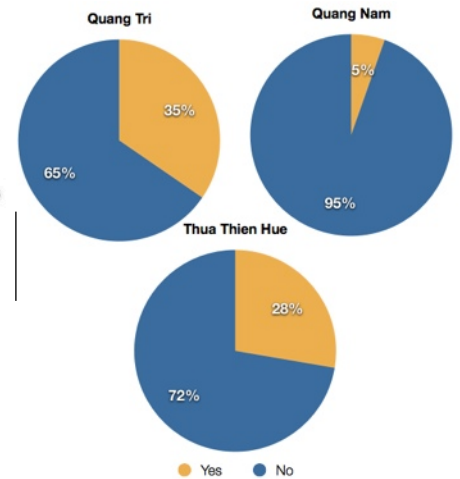
# Post Harvest and Marketing

Icing, salting, and drying are the major post harvest methods practiced by fishers who generally rated themselves as skillful. Few fishers participated in training courses as they were already knowledgeable about icing and salting post harvest practices.

**Fishers' skills and knowledge on post-harvest practices - examples from Quang Tri and Quang Nam (%)**

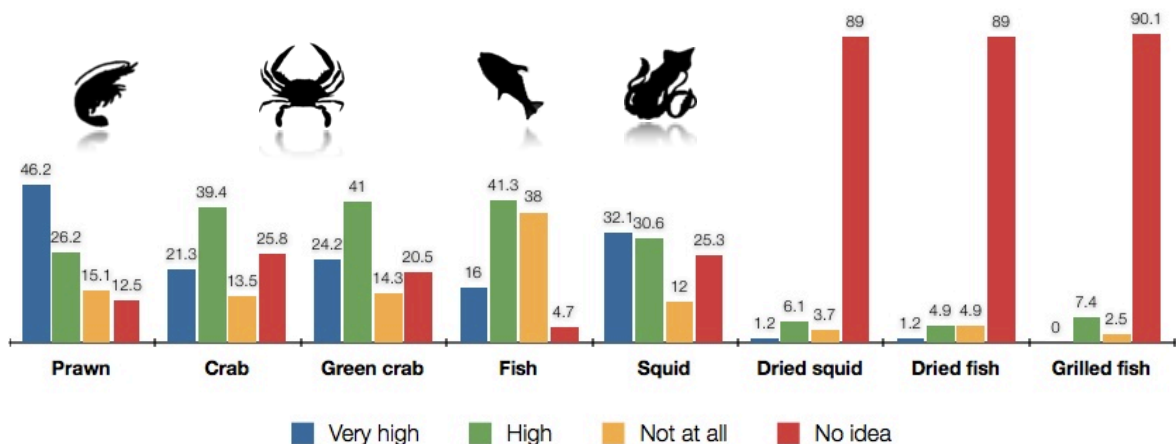


**Fisher's participation on post harvest training courses in the last three years**



Most fishers have limited market options for the sale of their products. The majority of fishers' catch is sold to 'middle-persons' who often control and determine the prices.

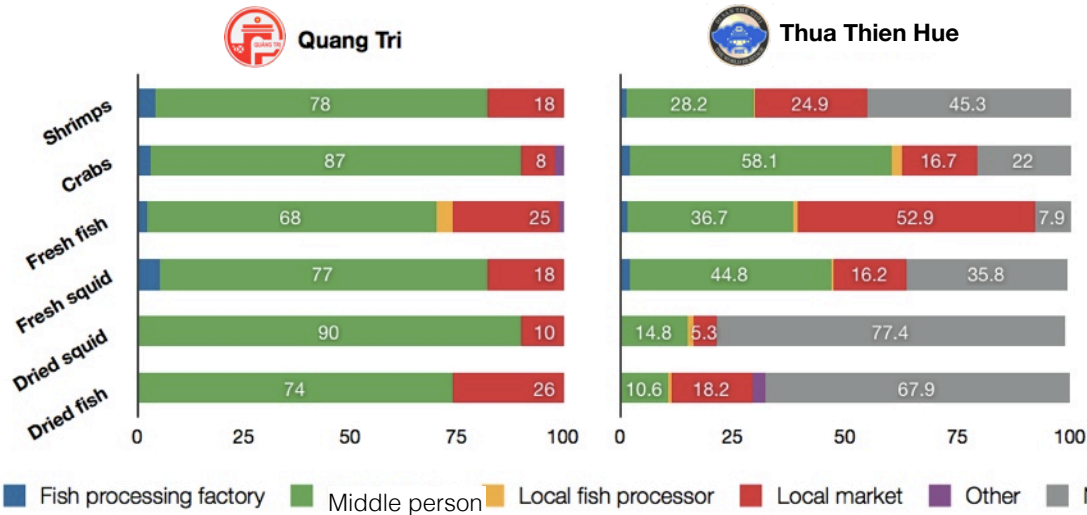
**Fishers' perception on the degree of dependence on middle persons - an example from Thua Thien Hue**



In Viet Nam there are no specific funding policies for the post-harvest sector. Support is integrated into related industrial extension and vocational training programmes. For example, Decision No. 11/2010/QĐ-UBND 2010, grants 1,100,000 VND (53 USD) for three months of training for fishers that conduct post harvest processing at a large scale. The survey revealed that few fishers pay attention to this grant due to the small sum of money and the strict and complicated selection process.



Immediate buyers and products proportion from the fishing households (%)

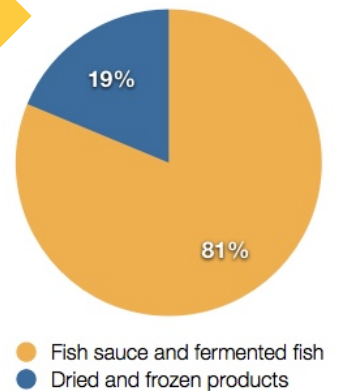


The local market also played an important role in post harvest sales.

In Thua Thien Hue, many fishers had no idea where their products went after they sold them to the middle person. However most fishers believed that the products were consumed locally in the province.

Despite a diverse range of products, fish processing is mostly done to produce fish sauce (*nước mắm*) or fermented products (*mắm*) such as squid, shrimps, and crabs.

Fisheries associated products with an approved trademark

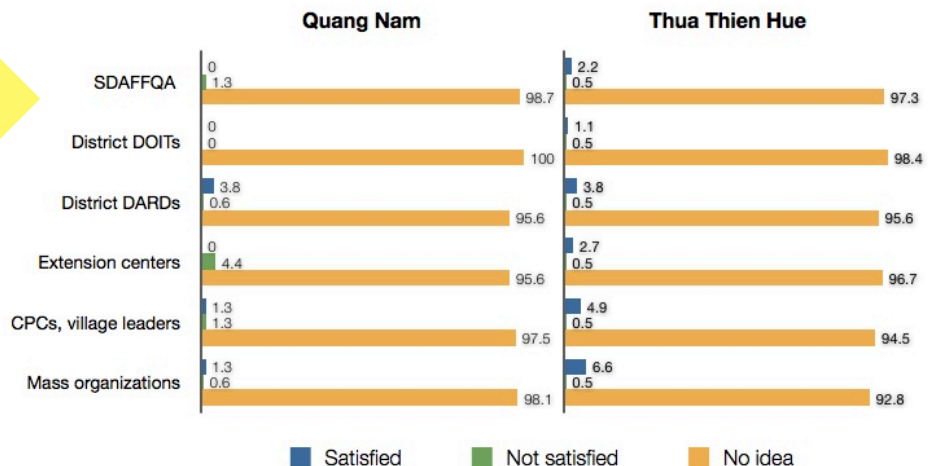


Due to lack of investment in improved techniques and equipment, processed products are not of high quality and value. Only 16 trademarks have been approved with most trademarks issued for fish sauces. Among the target communes, fish sauce trademarks have been issued for Phu Thuan Fish Sauce and Phong Hai Fish Sauce. Among the hundreds of small and very small processing enterprises and households, very few enterprises meet the requirements and standards for getting an approved trademark.

Lack of training in post harvest processing and support is an issue as most fishers possess only traditional forms of knowledge. Untrained fishers, poor skills, low capacity of staff and outdated equipment were identified as constraints in developing post harvesting and marketing.

Fisher's satisfaction with the support of institutions in fishery post harvest and marketing (%)

- **SDAFFQA** - Sub-department of Agro-Forestry-Fishery Quality Assurance
- **DOITs** - Department of Industry and Trade
- **DARDs** - Department of Agriculture and Rural Development
- **CPC** - Commune People's Committee

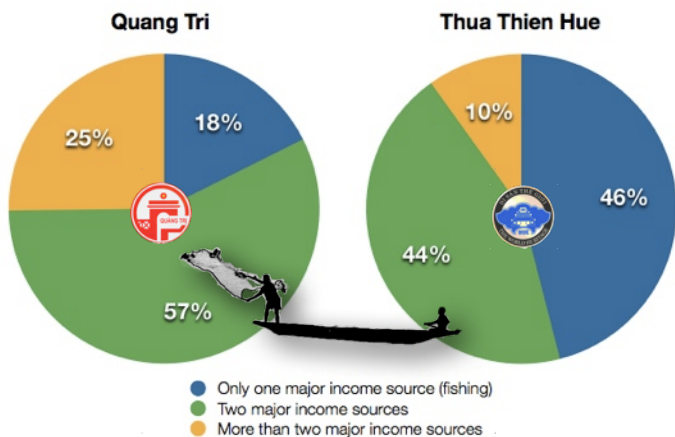


# Livelihoods

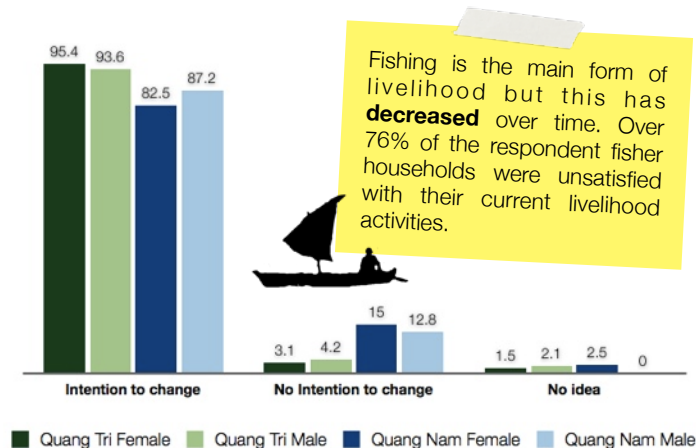
Although most households declared fishing as an important source of income, the vast majority of respondents express a desire to diversify their livelihood options into other areas.



Household income sources



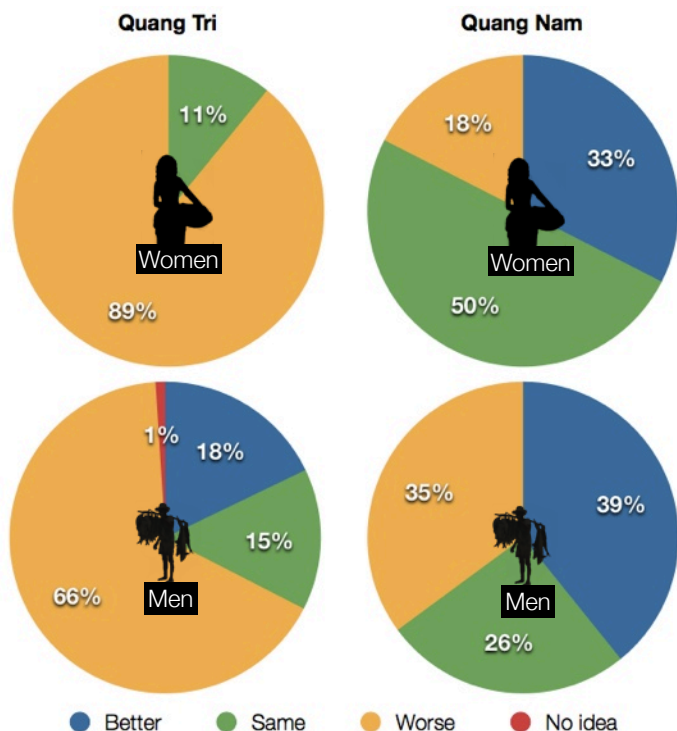
Fishers' attitude toward changing and diversifying livelihoods (%) - examples from Quang Tri and Quang Nam



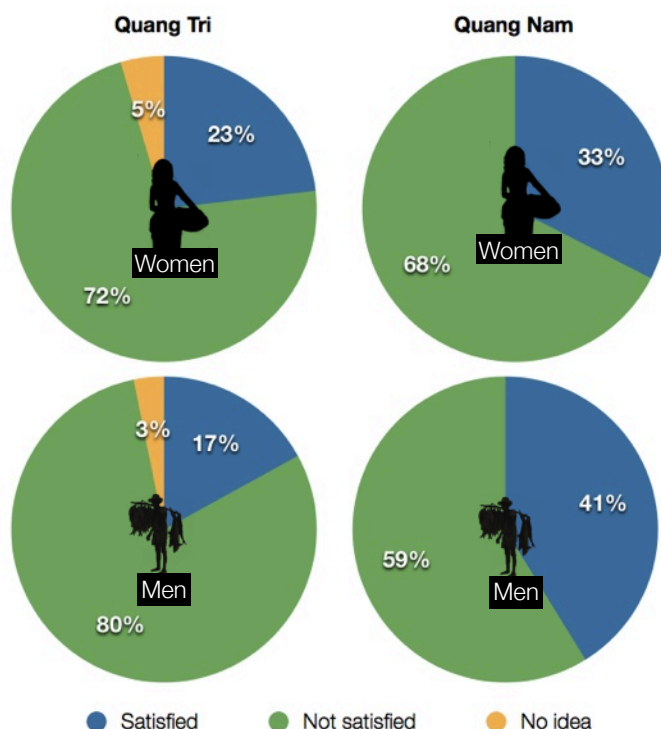
Fishing is the main form of livelihood but this has **decreased** over time. Over 76% of the respondent fisher households were unsatisfied with their current livelihood activities.

Respondents declare that livelihood opportunities are currently no better compared to five years ago with many fishers being unsatisfied with the current livelihood opportunities available.

Fishers' perception on the livelihood opportunities compared to five years ago - examples from Quang Tri and Quang Nam



Fishers' satisfaction with current livelihoods - examples from Quang Tri and Quang Nam



Fishers claim low knowledge/skill, little financial capital, few job opportunities, lack of confidence and under development of infrastructure are constraints to livelihood diversification.



## Quang Tri



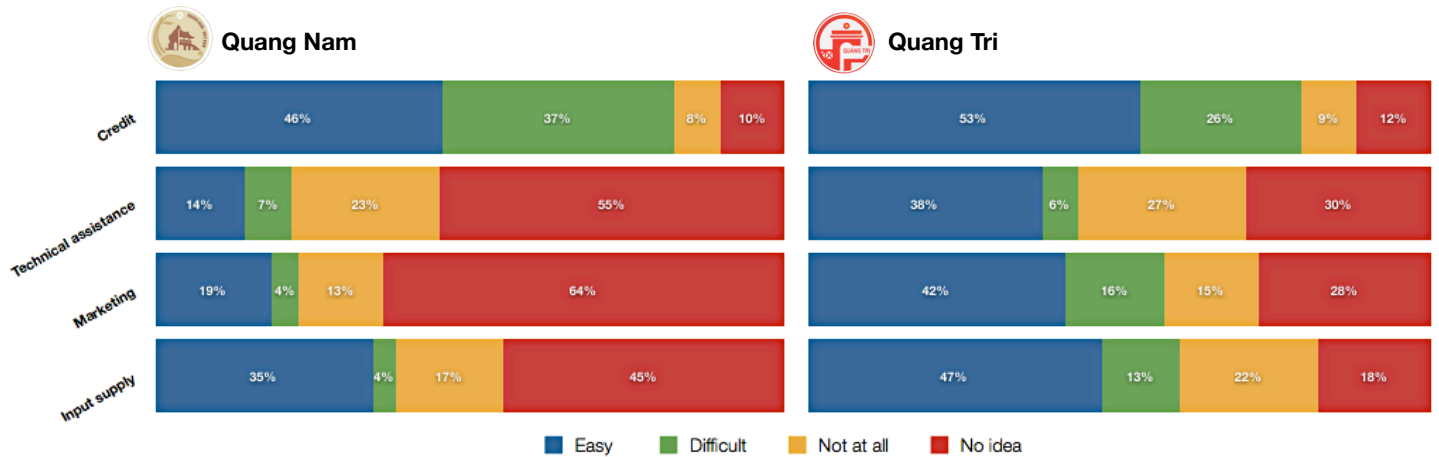
## Quang Nam

### Livelihood diversification options

Enabling Factors	Enabling factors
<ul style="list-style-type: none"> <li>✓ High percentage of labour</li> <li>✓ Good infrastructure</li> <li>✓ Support from mass organizations/companies at commune level</li> <li>✓ Enthusiasm of commune leaders</li> </ul>	<ul style="list-style-type: none"> <li>✓ Abundant labour force</li> <li>✓ Improved education level (younger generations)</li> <li>✓ Support from the government and NGOs</li> <li>✓ The development of industry and services</li> </ul>
Constraint factors	Constraint factors
<ul style="list-style-type: none"> <li>- Low technique in fishing and fish processing</li> <li>- Low access to market information</li> <li>- Low consumption of fishery product</li> <li>- Over-fishing by larger outside vessels</li> <li>- Lack of market sales</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of skilled labour</li> <li>- Shortage of financial capital/job opportunities</li> <li>- Unfavorable natural conditions: unfertile land, natural disasters</li> <li>- Undeveloped infrastructure</li> </ul>

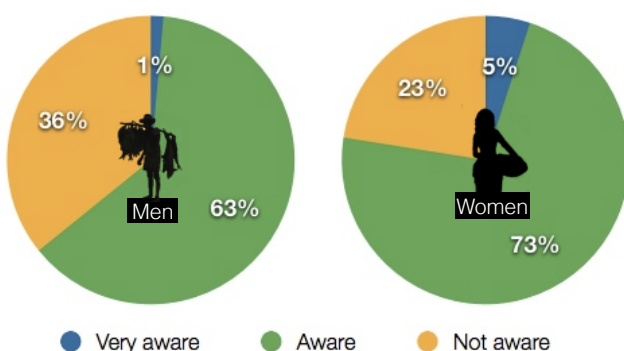
- Aquaculture
- Crop production
- Animal husbandry
- Labour
- Small business
- Fish processing

Fishers' access to supporting services for livelihood diversification



Although most fishers are aware of livelihood diversification and the supporting programmes in credit, technical assistance, marketing and input supply, few respondents were satisfied with their functions.

Fishers awareness on the availability of supporting programmes for livelihood enhancement - an example from Quang Nam

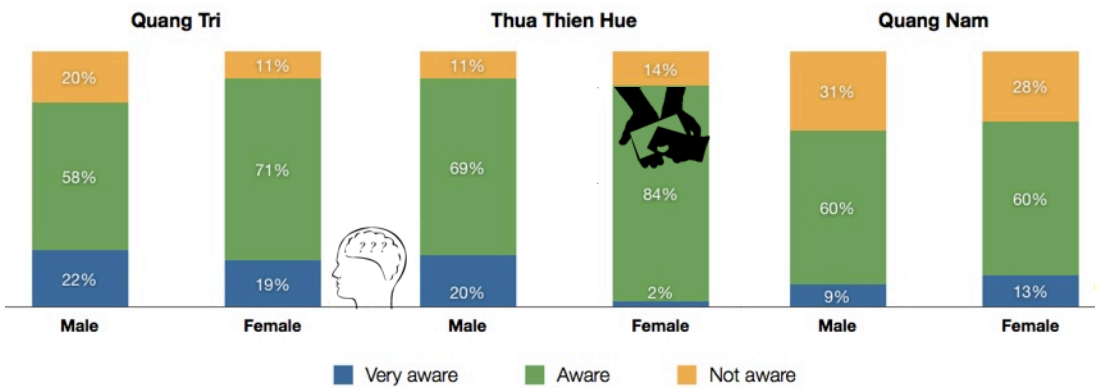


Generally, lagoon fishers' incomes are lower compared to off shore fishers, which can be three times higher. Men are the main income earners, while the women attend to housework responsibilities and the sale of fish at the market.

# Micro-finance

Both men and women are aware of the existence of financial services but not knowledgeable about the different types of services offered.

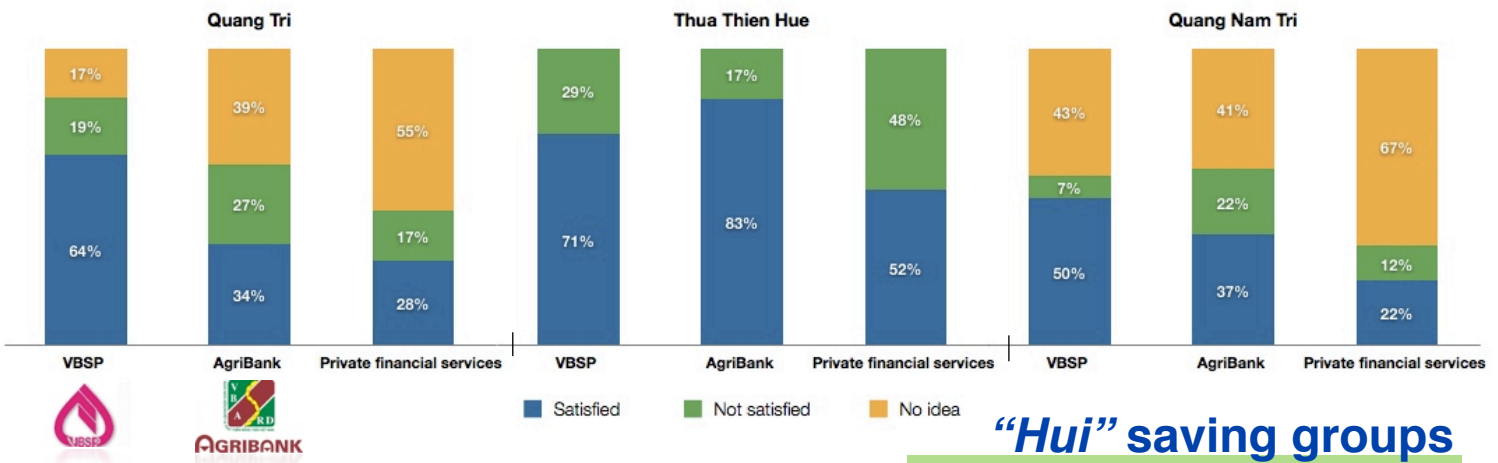
Fishers' awareness of the availability of financial services



It was revealed that most fishers cannot fully complete loan applications themselves as they were not aware/confident of bank regulations or read/write poorly.

When households need financial services, formal services are often the main choice. Generally, men and women are satisfied with formal financial services (e.g. banks; particularly Viet Nam Bank for Social Policy, VBSP) over private financial services.

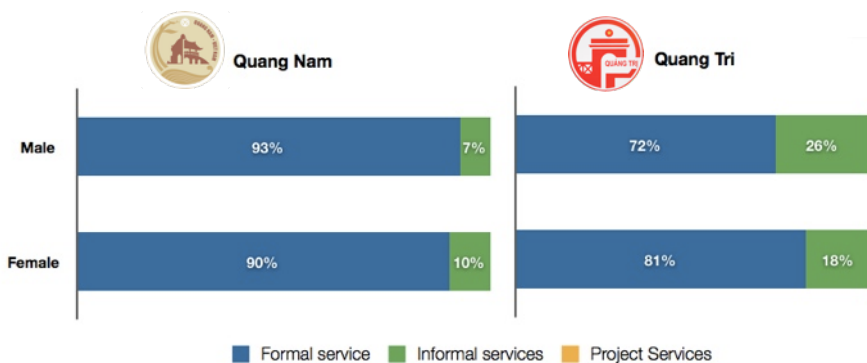
Fishers' satisfaction with formal and private financial services



## "Hui" saving groups

Informal financial institutions exist in all communes such as the popular "hui" groups. "Hui" groups are 10 to 20 members that live in the same commune who save monthly within the group and borrow when needed. The amount saved varies from hundreds to millions of VND depending on the group's regulations. Each month, the group puts the amount out to tender where members bid against each other to take the credit. The one who offers the highest interest rate is approved to take the credit. Usually, the base interest rate is equal to the interest rate of banks and the money earned from lending is distributed equally to the remaining members.

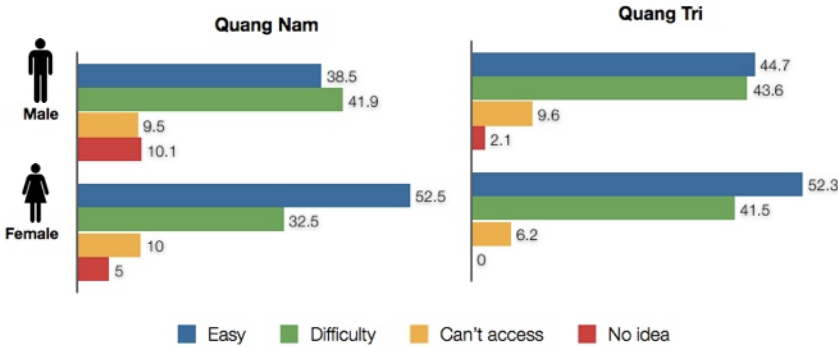
Fisher's choice of financial services when in need





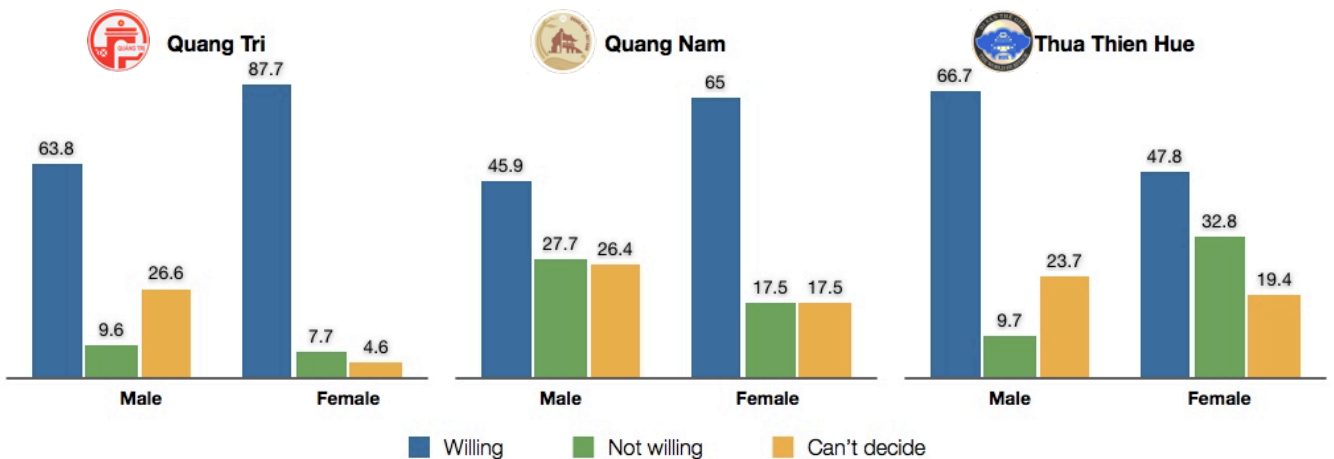
Even with relatively good access, households declare that it was still somewhat difficult to acquire loans when in need. High interest rates, collateral demands, and complicated procedures were major constraints for fishers when considering micro-finance services.

Fishers' perception on acquiring credit when in need (%)

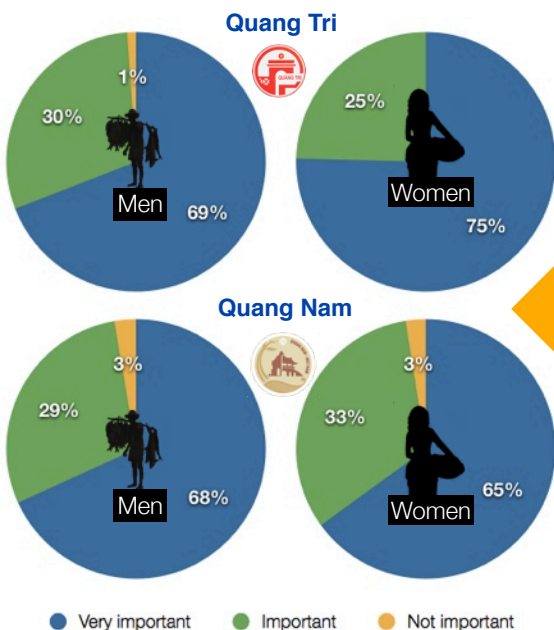


Generally, both men and women possess a high willingness to save money with both private money lenders, family/friends, and formal financial institutes such as VBSP and Agribank.

Fisher's willingness to save capital (%)



Fishers' perception on the importance of savings



Although general awareness on the importance of saving is high, women are more aware of its importance. Few women use private finance services over formal financial services and a considerable number of women use 'hui' groups as a means to save capital.



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