

THE CURRENT STATE AND POTENTIAL OF ORNAMENTAL FISH PRODUCTION IN PERI-URBAN HO CHI MINH CITY, VIETNAM



Dr. Le Thanh Hung, Dr. Vu Cam Luong
Ng Thanh Tam, Ph Ngoc Tam, B.T.P. Thao, Thanh Truc

ORNAMENTAL FISH IN HO CHI MINH CITY



- HCMC is the leading producer and largest market in VN
- > 200 grow-out households, 19 million fish in 2004
- >100 ornamental fish stores
- Export > 3 million fish, value 4 million USD per year
- Expected 10-15 million USD exporting in 2010
- Import 48,963 fish in 2004

HISTORY OF DEVELOPMENT



- The first ornamental fish stores started in 1945 in LXT market
- Growing faster since 1967, and fastest during 1972-1974, with import-export activities
- During 1975-1980s: no market and less demand
- Since 1989: to rehabilitate rapidly
- Since 2003: growing steadily

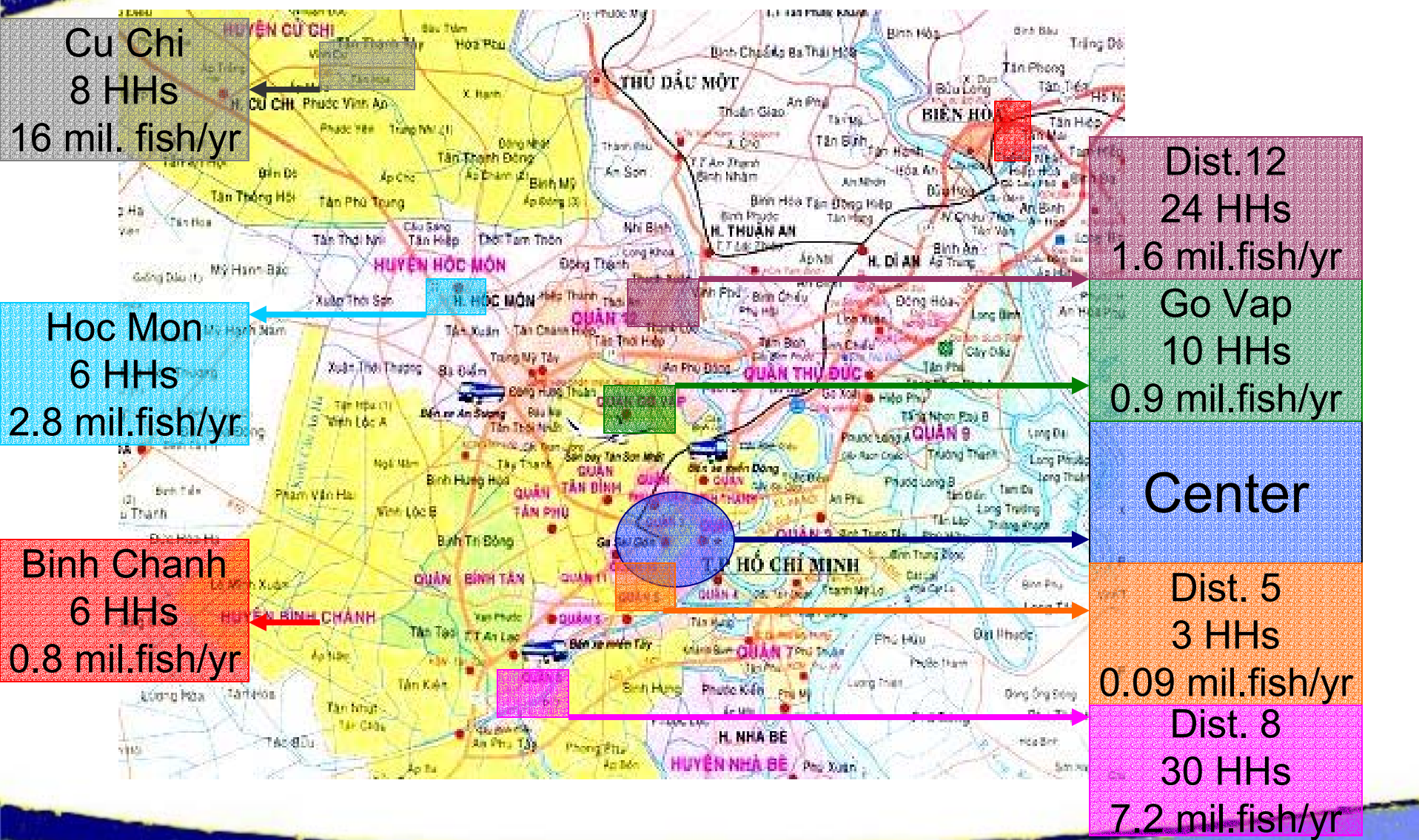
Ornamental fish culture in Ho Chi Minh City in 2005

Production:
34.4
millions
fish

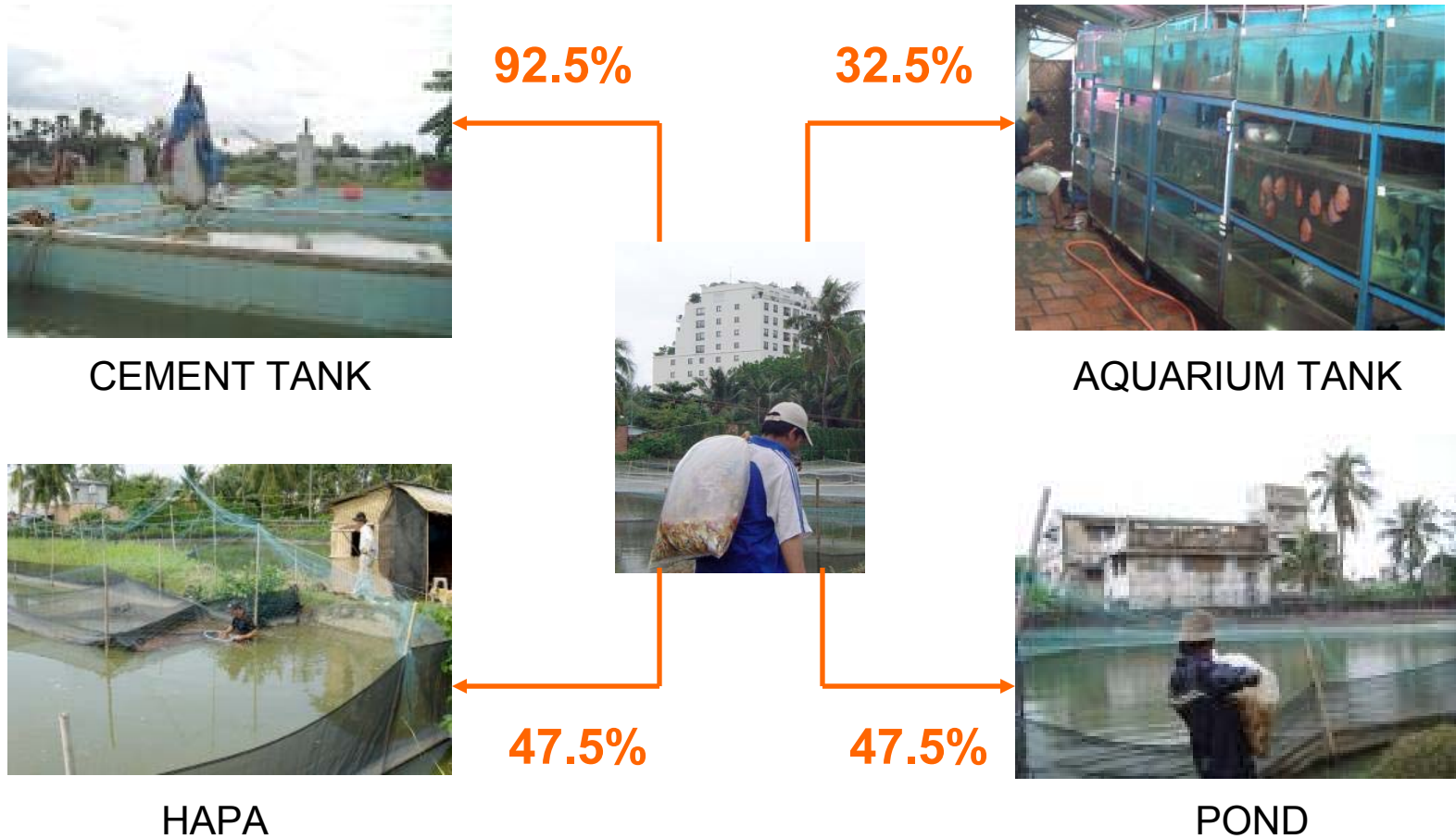
Income:
12.8
billions
VND
(0.8 million
USD)



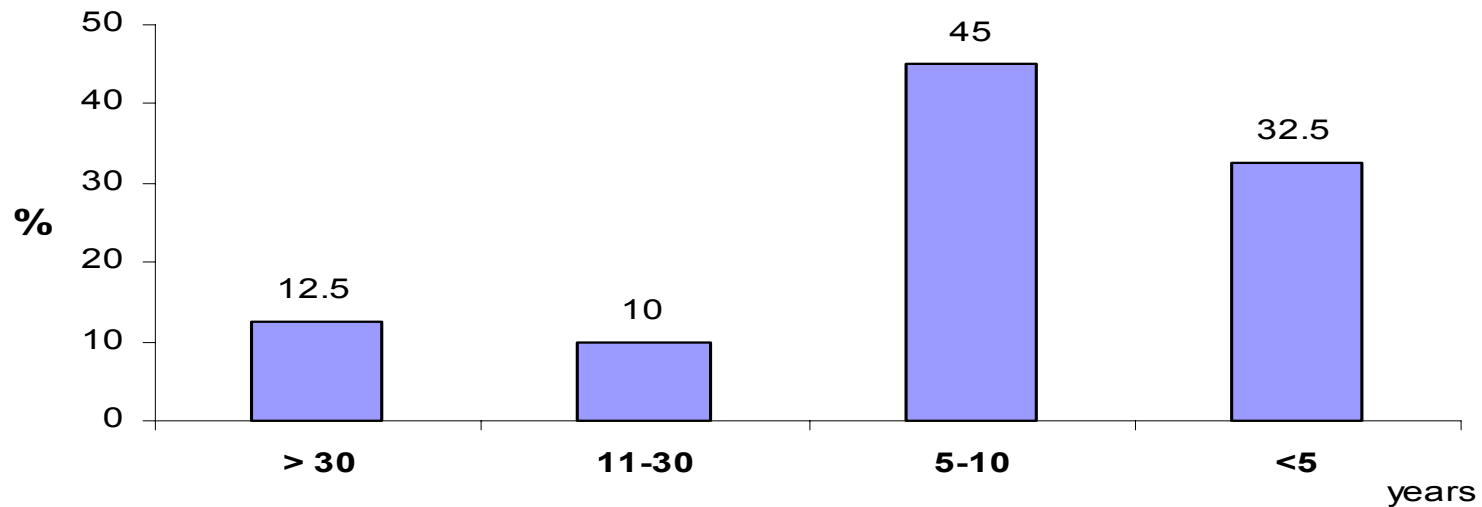
Ornamental fish culture in Ho Chi Minh City



Ornamental fish culture systems

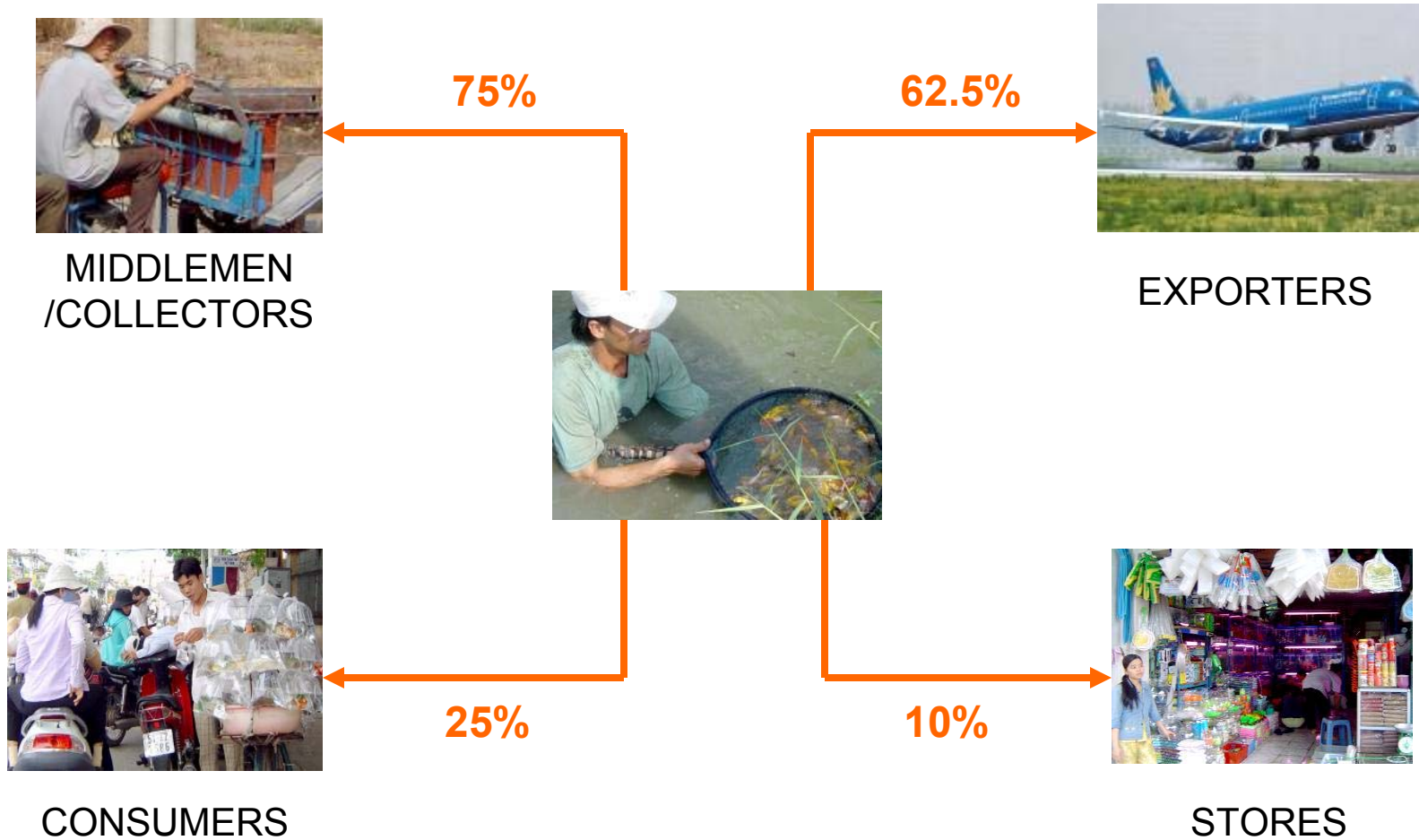


Years of experience of farmers



Income (ornamental fish culture / total income) = 84.5%

Distribution channel from farms

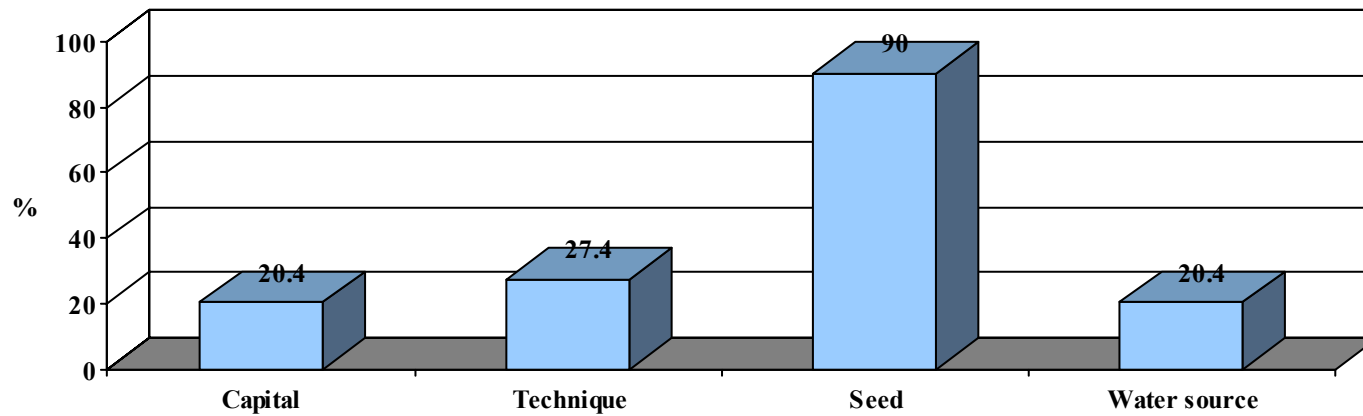


PCA in Ward 15, District 8



- PCA meeting was carried out on 19 Aug 2005
- Participants: 18 ornamental fish grow-out farmers, age: 32-60
- This is the original place where ornamental fish started in Saigon
- There was around 30 ornamental fish farms in the area, producing 7.2 millions fingerlings per year, value 3.6 billion VND per year

Problems ranking in District 8

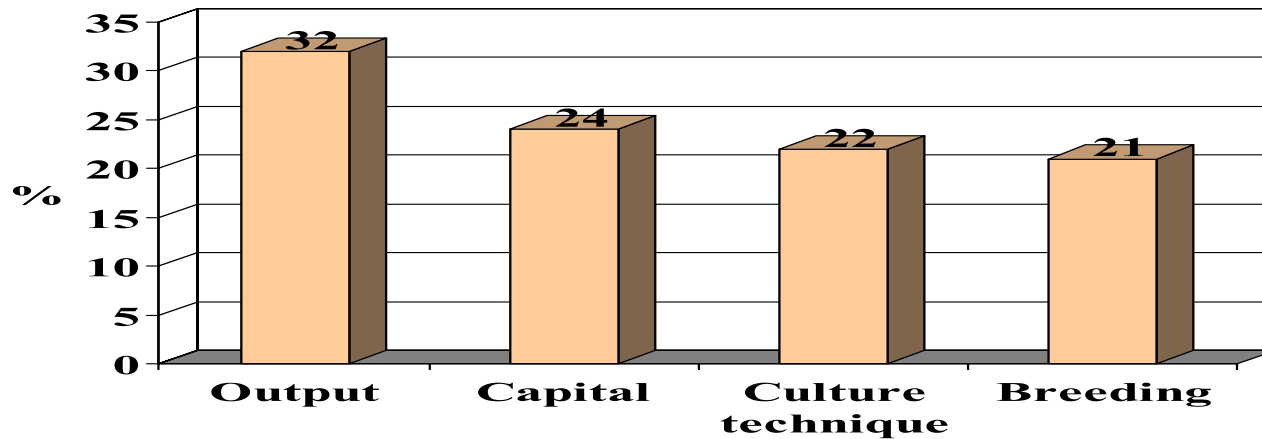


PCA in Ward 17, Go Vap District



- The second PCA meeting was carried out on 24 Aug 2005
- Participants: 20 ornamental fish grow-out farmers, age: 21-55
- This is the new culture area, started since 1996 in small-scale
- During 2000-2005, production in larger scale, around 10-15 ornamental fish farms in the area, producing 1 million fingerlings per year, value 0.34 billion VND per year

Problems ranking in Go Vap District



ORNAMENTAL FISH MARKETS



- Mobile ornamental fish vender
- Ornamental fish stores (with and without whole sale)
- Ornamental fish markets: 1 whole sale and 1 retail market
- Export market
- Import market
- Importing for re-export market

VERY VIETNAM, MOBILE ORNAMENTAL FISH VENDER



- In-bags popular species: koi carp, golden fish, oscar ...
- Sources of fish: growout farmers, stores or middle man

THE SURVEY OF ORNAMENTAL FISH STORES



- Survey: 36 ornamental fish stores (1 Sep – 15 Oct 2005)
- Retailer (Group A): 41.7%
- Whole sale and Retailer (Group B): 58.3%
- Previous experience working with fish: 0%
- Years of experience: >10yr (22.2%) - <5yr (47.2%)

OPERATING OF ORNAMENTAL FISH STORES



- Average operating time: 12 hours per day, 7 days per week
- Average number of labors: 3 person per store
- Business types:
 - Freshwater ornamental fish (100%)
 - Natural feed (72.2%) and pellet feed (94.4%)
 - Submerged plants (80.6%)
 - Glass tanks and equipments (61.1%)
 - Design service (61.1%)

MAJOR SPECIES OF ORNAMENTAL FISH



Among the most popular species produced by HCMC are:

- Koi carp (*Cyprinus carpio*)
- Golden fish (*Carassius auratus*)
- Discus (*Symphysodon sp.*)
- Angel fish (*Pterophyllum scalare*)

MAJOR SPECIES OF ORNAMENTAL FISH

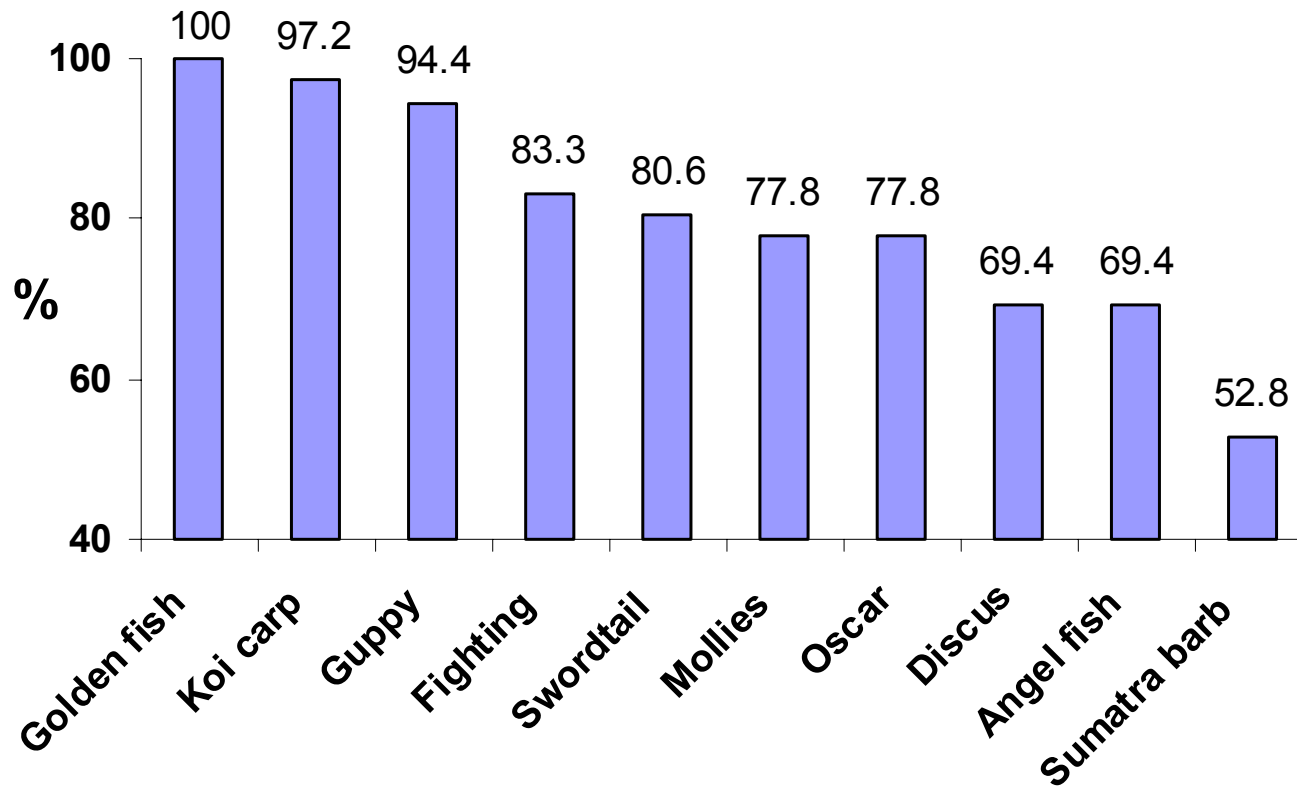


Among the most popular species produced by HCMC are:

- Guppy (*Poecilia reticulata*)
- Fighting fish (*Betta splendens*)
- Swordtail (*Xyphophorus helleri*)
- Oscar (*Astronotus ocellatus*)

TOP TEN SPECIES TO BE SOLD

Species successfully bred in Vietnam



MAJOR WILD NATIVE SPECIES



Among the most popular wild native species are:

- *Tetraodon fluviatilis* (Nóc da beo)
- *Toxotes chatareus* (Mang rô)
- *Chilata ornata* (Nàng hai)
- *Pangasius sutchi* (Mập nước ngọt)
- *Monodactylus rebae* (Chim bốn sọc)

MAJOR WILD NATIVE SPECIES

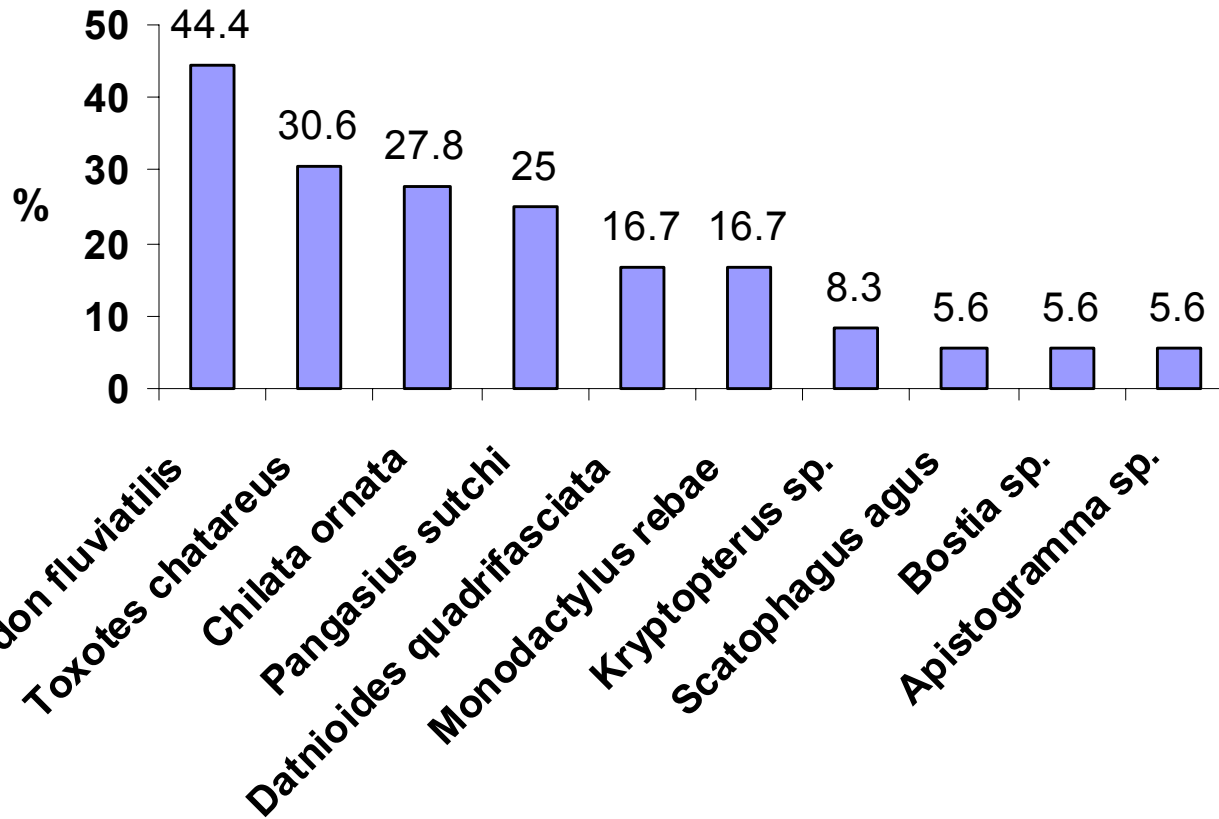


Among the most popular wild native species are:

- *Datnioides quadrifasciata* (Thái hồ)
- *Kryptopterus sp.* (Trèn)
- *Scatophagus agus* (Nâu)
- *Bostia sp.* (Heo)
- *Apistogramma sp.* (Phượng hoàng)

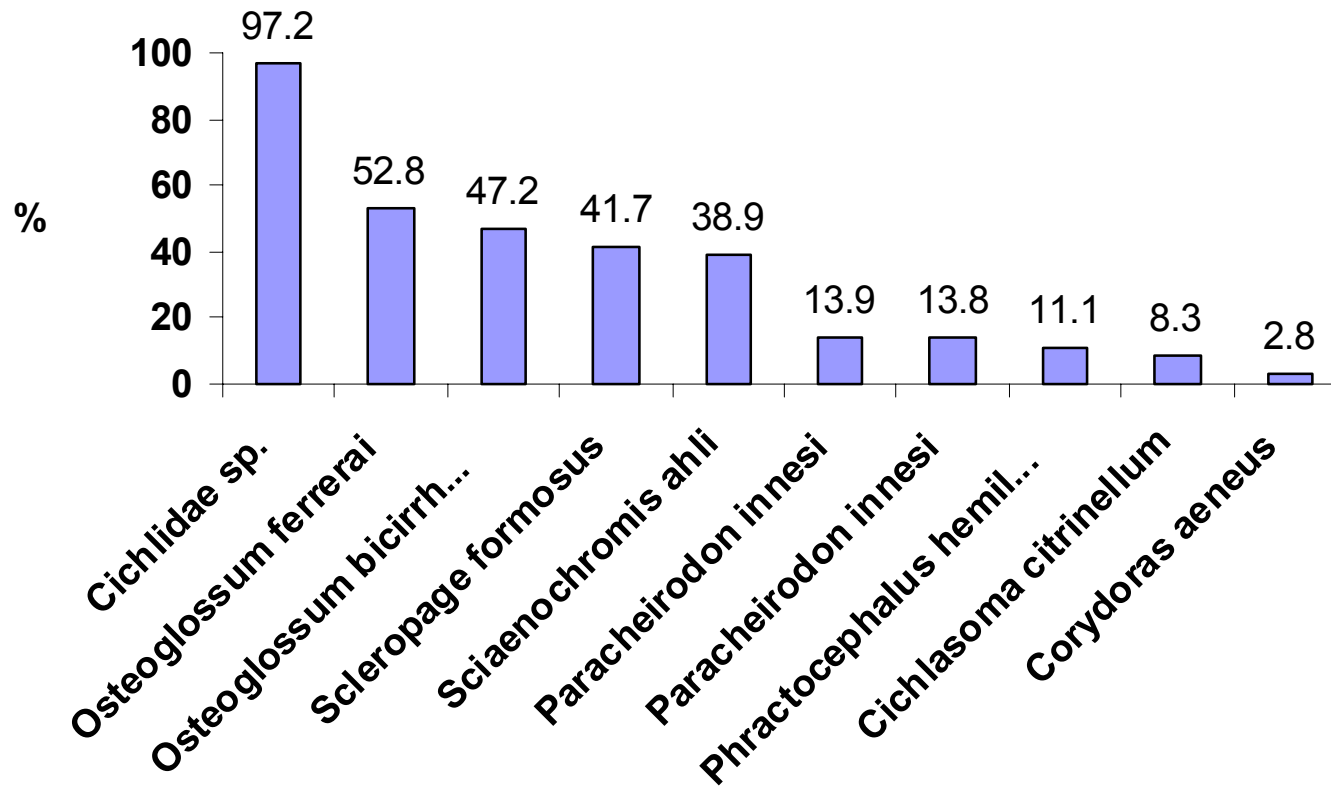
TOP TEN SPECIES TO BE SOLD

Wild native ornamental fish

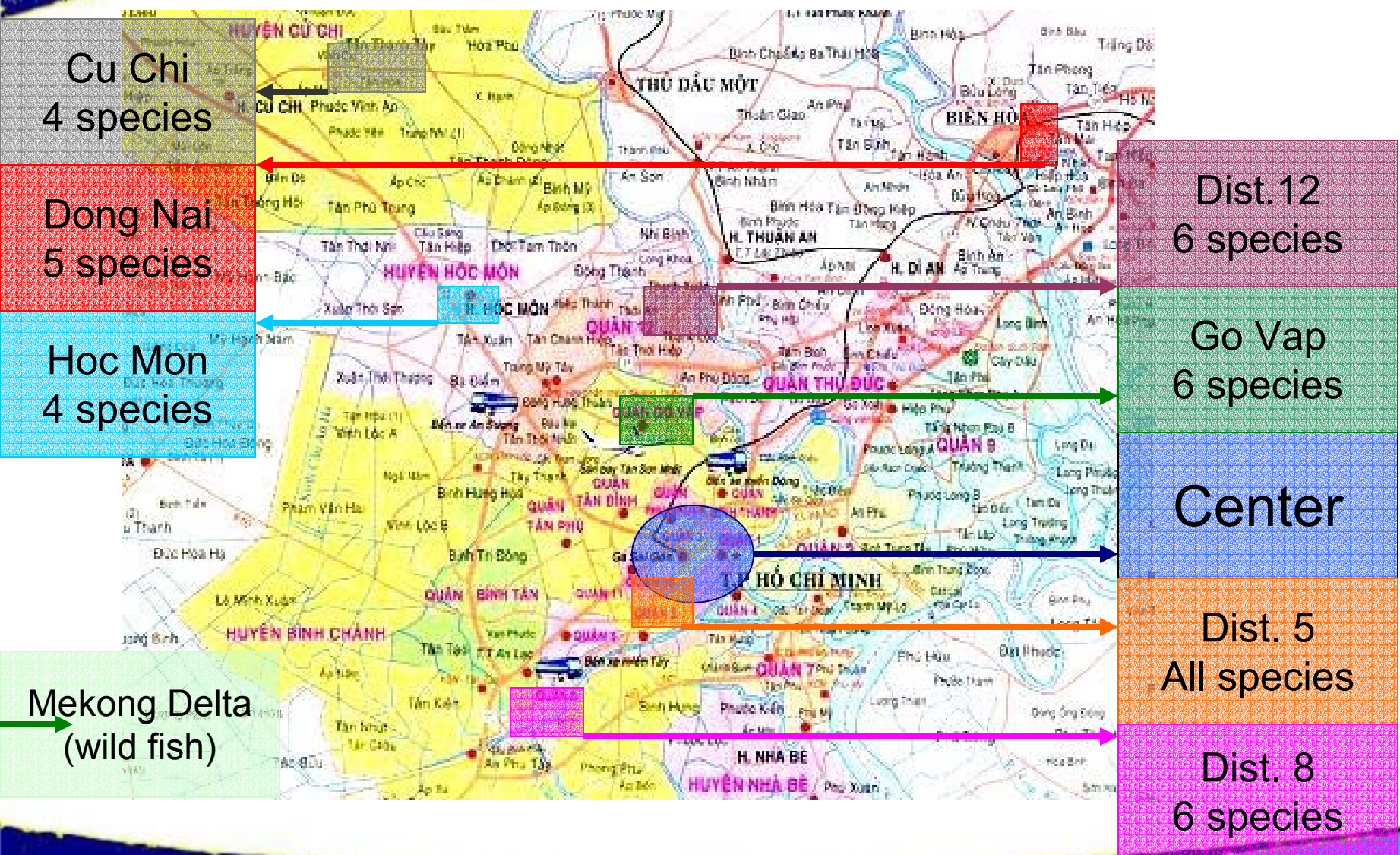


TOP TEN SPECIES TO BE SOLD

Imported ornamental fish



SOURCE OF FISH in SPECIES



DISTRIBUTION CHANNEL TO THE STORES



PRODUCERS

83.3%



MIDDLE MAN

72.2%



SELF-PRODUCTION

19.4%



COLLECTOR

8.3%

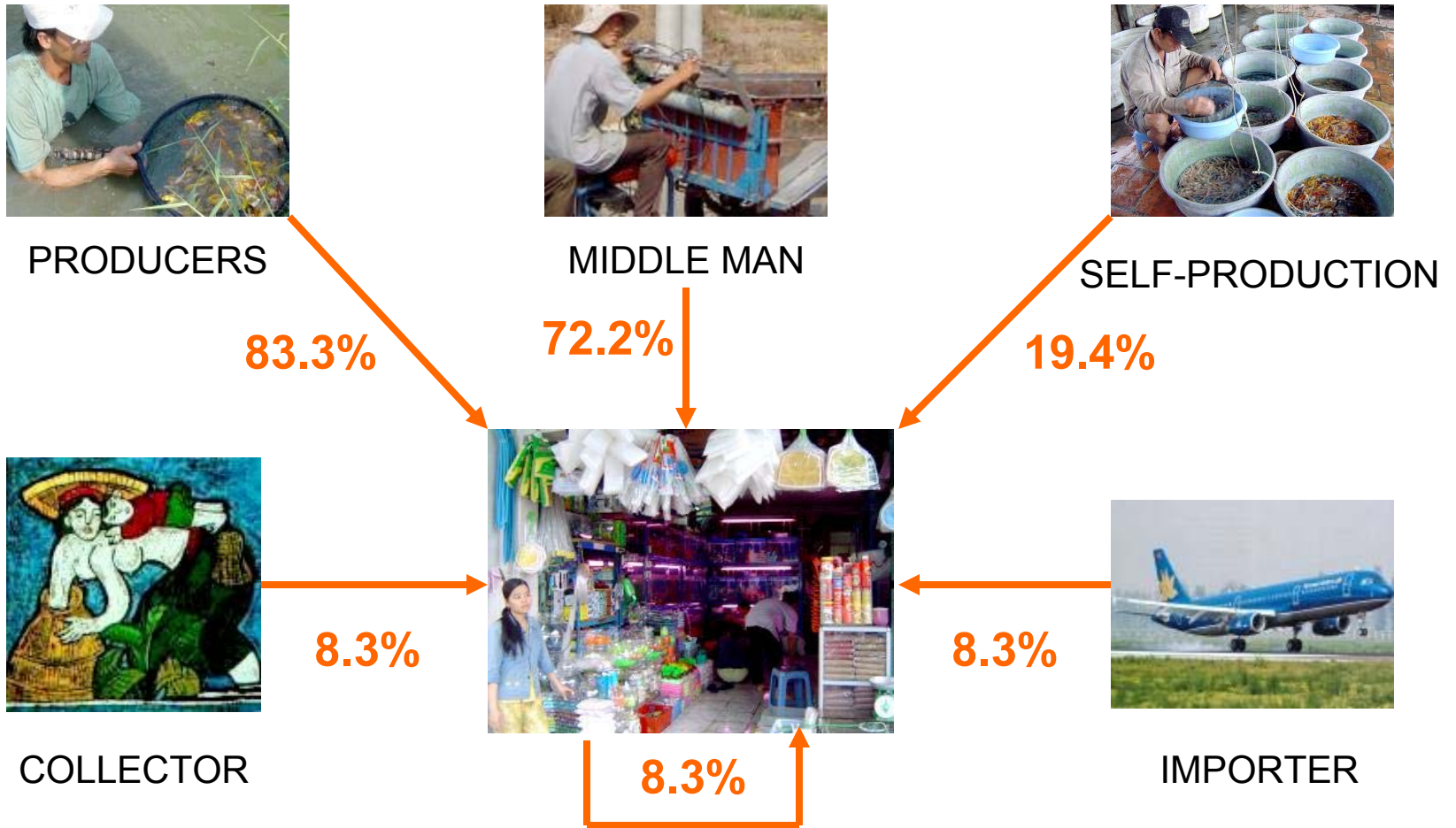


8.3%

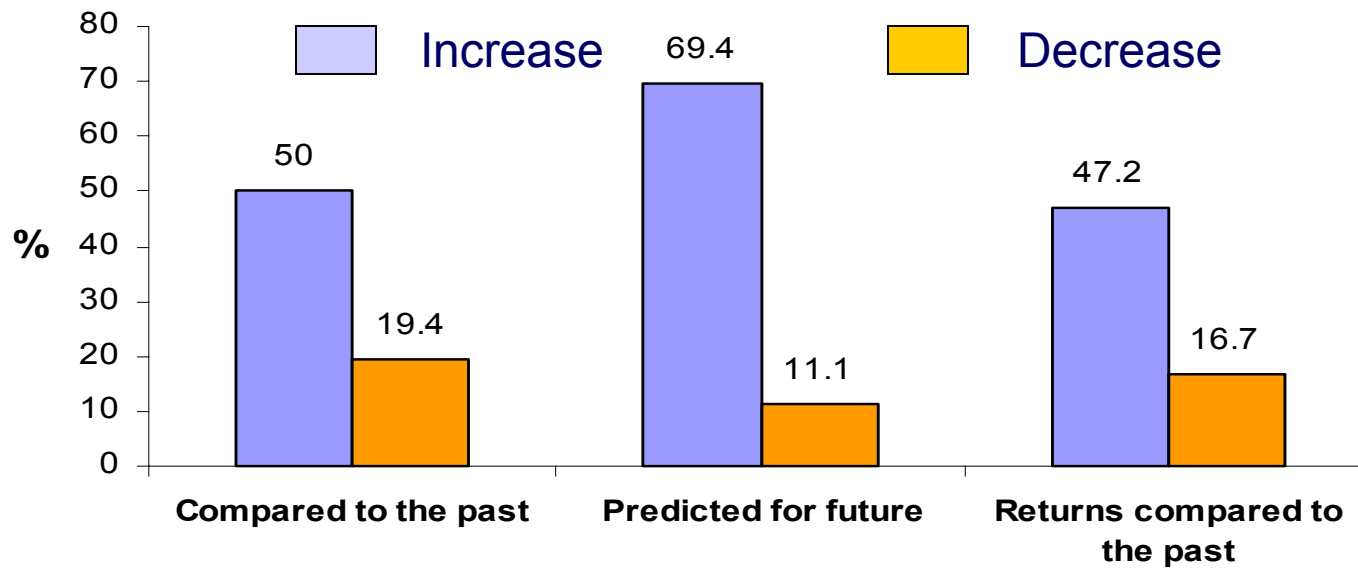


IMPORTER

8.3%



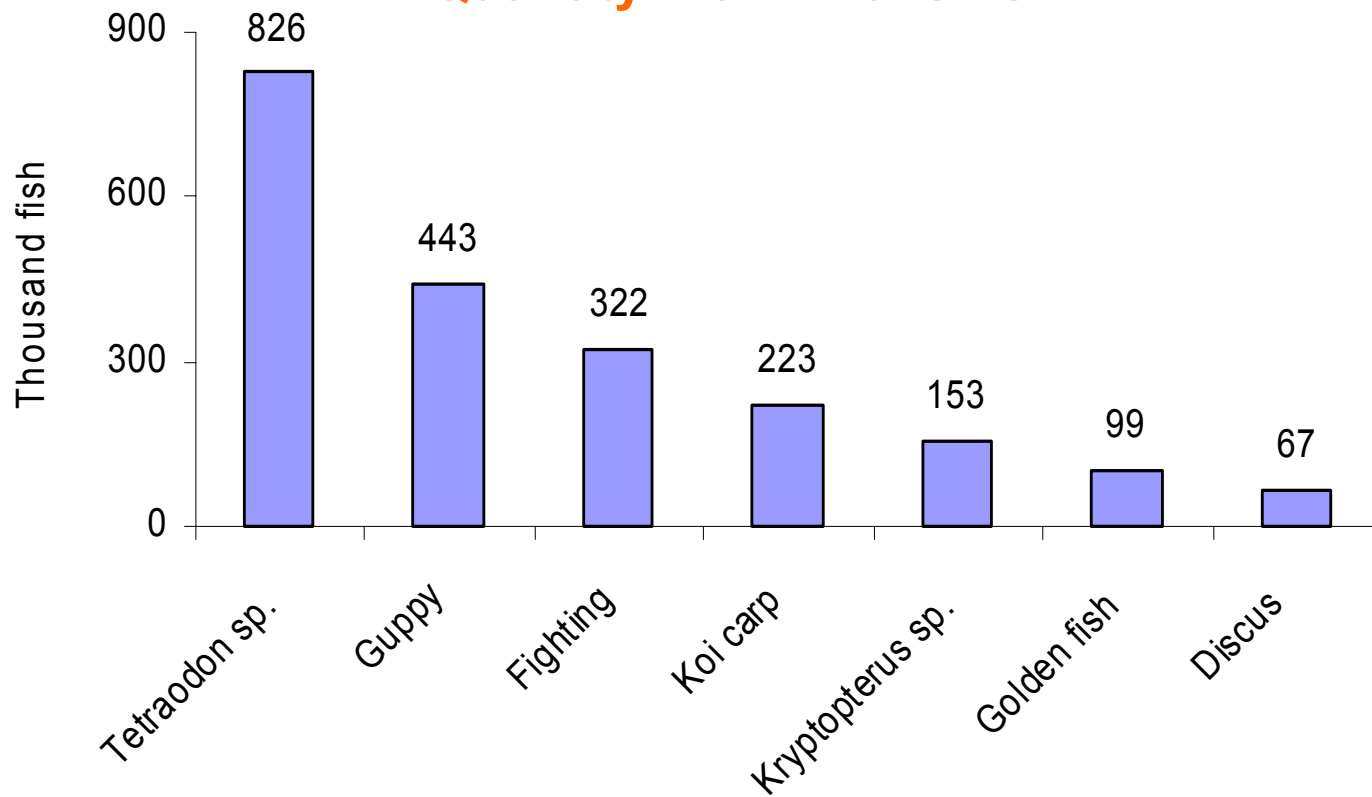
TRENDS OF SELLING



EXPORT MARKET in Quantity

Year: 2004

Quantity: >5 millions fish

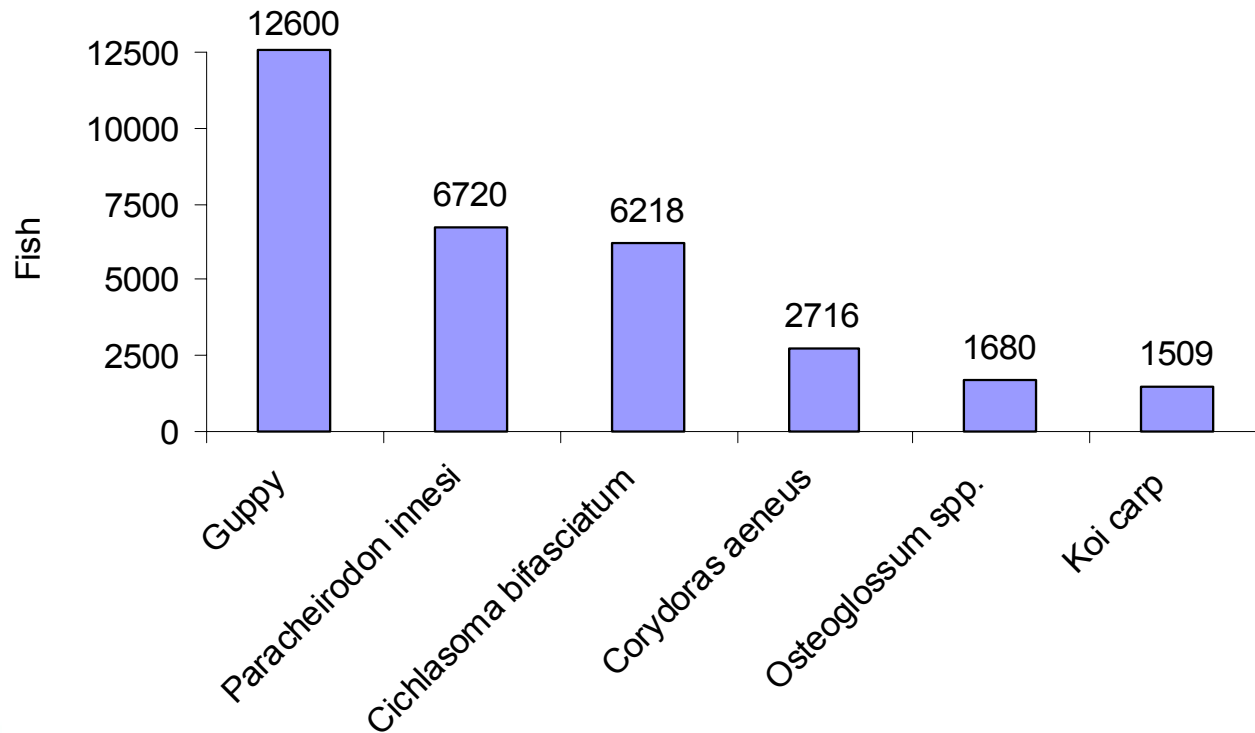


IMPORT MARKET in Quantity

From Jan to Feb 2005

Source: Taiwan, Hongkong, Singapore, Thailand

Total: 43,929 fish



PROJECT'S OUTPUTS



ORNAMENTAL FISH MOVIE



SOS REPORT



FISH CHART (POSTER)



INFORMATION on WEB

THANK YOU!

