

**Workshop 3.3: Blue Economy Development:
Where are we now? Where are we headed?**



THE EAST ASIAN SEAS CONGRESS 2015

Global Targets
Local Benefits

Setting the Sustainable Development Agenda
for the Seas of East Asia beyond 2015

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Viet Nam's marine industries: Current state and perspectives

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Vietnam's marine industries: current state and perspectives



CONTENTS

Asia

Land now inhabited by 600 million Chinese would flood, as would all of Bangladesh, population 160 million, and much of coastal India. The inundation of the Mekong Delta would leave Cambodia's Cardamom Mountains stranded as an island.

- Vietnam's coastal and marine resources: an introduction
- Current state of Vietnam's marine industries
- Challenges and Opportunities



Vietnam's coastal and marine resources: an introduction

1. A long coastline and more than 3000 islands (including 3 are larger than 100 km²); a great potential to develop deep sea ports; beautiful landscapes and beaches (about 20 at international standard).
2. Very densely populated with 50% of the nation's total population of 90.7 million living in 28 coastal provinces; most developed provinces in Vietnam as HCM City, Haiphong, Quangninh, Danang, Baria-Vungtau.
4. Various types of minerals in the seabed and subsoil, including oil & gas; variety of aquatic species.
5. Be vulnerable to storm and negative impacts of climate change.

Current state of Vietnam's marine industries

- There is no universally accepted definition of the marine economy and its industries. There are differences amongst different countries in defining identifying and valuing marine industries.
- McIlgorm (2004) identified 9 sectors: Oil and Gas (minerals); Fisheries / Aquaculture (living resources including sea plants); Shipping (transport and shipbuilding); Defence / Government (government services); Marine Construction (coastal defences and restoration); Marine Tourism (leisure services); Manufacturing (equipment, medicines, etc); Marine Services (mapping, surveying, consulting); Marine Research and Education
=> How about **ENERGY** (wind farm; tidal power/ wave energy) or **SEA SALT FARM**?
- One more tough question: **how are they divided into sub-sectors and classified by SNA?**

Current state of Vietnam's marine industries

- According to Resolution 09-NQ/TW (2007) (Strategy for Marine Economy Development to 2020): State shall give priority to: (1) Oil and Gas (minerals); (2) Fisheries / Aquaculture (living resources including sea plants); (3) Shipping (transport and shipbuilding); (4) Marine Tourism (leisure services); and (5) Economic Zone.
- According to the Law of the Sea of Vietnam: Minus: Economic Zone; Plus: Marine Research (5); and Marine Education (6)
- It is estimated that these marine industries (6) are contributing about 20% of GDP, much higher than that of Japan, Norway, U.K, and Australia => **Marine Economy has played more and more an important role.**

1. OCEAN ECONOMIC ACTIVITIES (gross value added)	Year 2015 (estd. in million US\$, at constant 2010 prices)
• Fisheries and Aquaculture	3.701
• Offshore Oil and Gas	12.089
• Manufacturing	5.224
• <i>Seafood processing</i>	3.192
• <i>Ship building and repair</i>	2.032
• Shipping and Ports	1.816
• Marine tourism and recreation	5.455
• Rescue Services	0.18
• Marine research and education	0.013
• Marine services (mapping, monitoring, consulting, maritime insurance, etc.)	0.46
TOTAL (million US\$)	28.938
2. CONTRIBUTION TO GDP (percent)	18.8
3. EMPLOYMENT IN OCEAN ECONOMY (million)	app. 3.0

Current state of Vietnam's marine industries

- Vietnam has emerged as an important oil and natural gas producer in Southeast Asia. In period 2007-14, Vietnam produced 128,2 million tons of crude oil and 70 m³ of natural gas. It contributed 16.4% of state budget in that period.
- It is estimated that only 7% of volume of goods in Vietnam are transported by sea. Until of 2013, Vietnam's fleet is comprised of 1780 vessels of 6.9 million DWT (4th in ASEAN).
- Sea-island tourism attracts about 70% of international arrivals to Vietnam and 50% of domestic visitors annually, which brings 70% turnovers for the whole tourism industry.
- Volume of export of seafood has increased rapidly, from 5.0 billion of USD in 2010 up to 7.8 billion of USD in 2014.
- In 2014, the percentage of trained employed workers of coastal provinces were 18.6, little bit higher than that of whole country (18.2)



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TRUNG QUỐC

2014

TỶ LỆ ĐÔ THỊ HÓA QUẢ CÁC NĂM

Năm	Tỷ lệ đô thị hóa của nước ta (%)	Tỷ lệ đô thị hóa các tỉnh ven biển (%)
Năm 2010	30,5	34,8
Năm 2011	31,6	35,5
Năm 2012	33,8	35,8
Năm 2013	32,2	36,4
Năm 2014	33,1	36,9

CHỦ GIẢI

- Tỷ lệ đô thị hóa tính ven biển năm 2014 (%)
- 44,8 - 88
- 26,6 - 48
- 18 - 26,6
- 10 - 18
- Biên giới quốc gia
- Ranh giới tỉnh
- Ranh giới các tỉnh ven biển

CÁC TỈNH VÀ TỈ LỆ ĐÔ THỊ HÓA (2014):

- Quảng Ninh: 44,8%
- Hải Phòng: 48%
- Thái Bình: 18,2%
- Nam Định: 18,3%
- Ninh Bình: 14,7%
- Thanh Hóa: 15,1%
- Nghe An: 15,6%
- Hà Tĩnh: 19,5%
- Quảng Bình: 23,1%
- Quảng Trị: 29,1%
- Thừa Thiên Huế: 40,8%
- TP. Đà Nẵng: 37,7%
- Quảng Nam: 19,3%
- Quảng Ngãi: 15,6%
- Bình Định: 31%
- Phu Yên: 25,8%
- Ninh Hòa: 38,2%
- Ninh Thuận: 39,3%
- Bình Thuận: 30,1%
- TP. Hồ Chí Minh: 40,1%
- Bà Rịa Vũng Tàu: 18,1%
- Tiền Giang: 30,2%
- Bến Tre: 16,6%
- Trà Vinh: 31,9%
- Sóc Trăng: 26,4%
- Bạc Liêu: 22,6%
- Cà Mau: 22,6%
- Côn Đảo: 10,1%

LÀO

VINH BẮC BỘ

Đảo Hải Nam (Trung Quốc)

BIỂN ĐÔNG

CAM PU CHIA

VINH THÁI LAN

QUỐC (H. Trương)

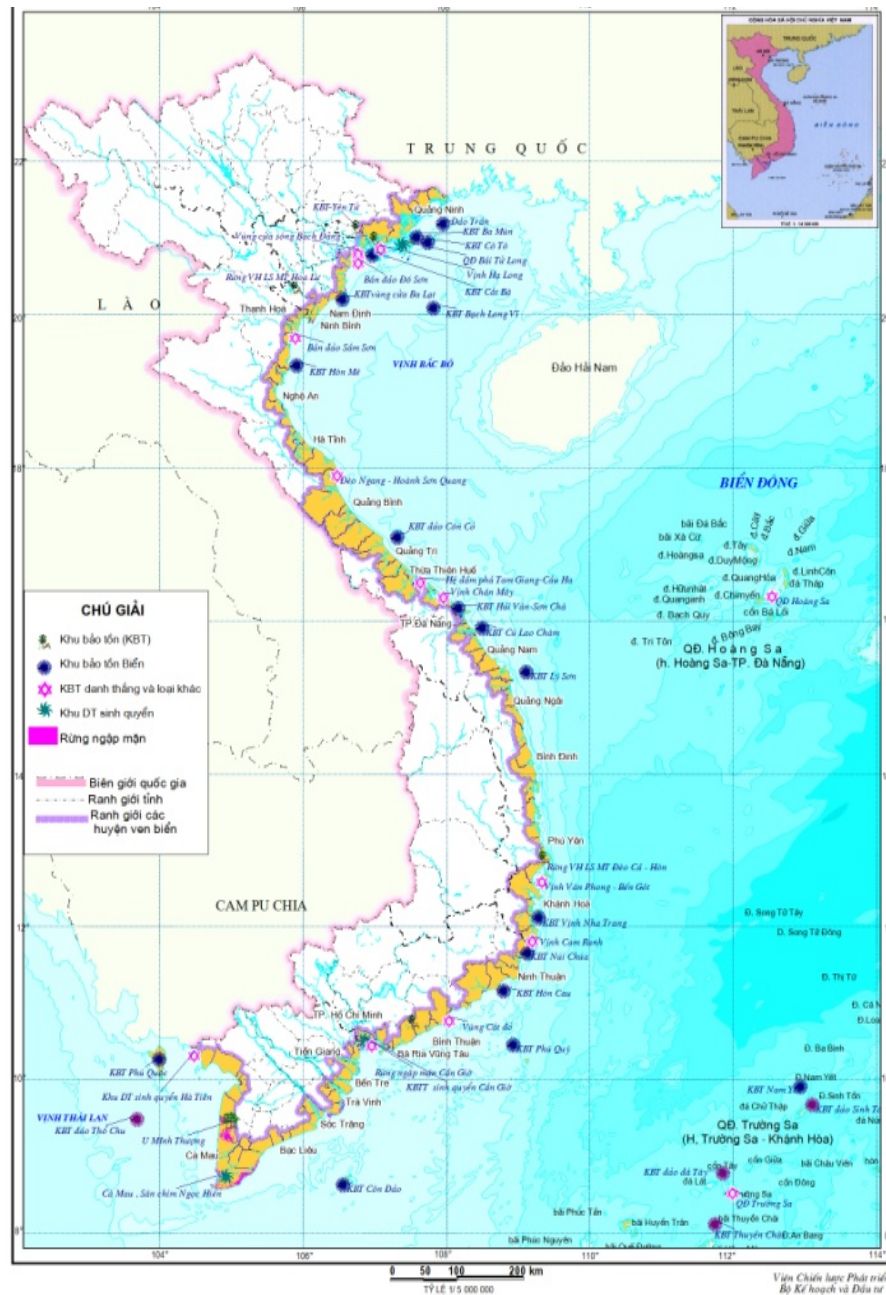
VIỆT NAM

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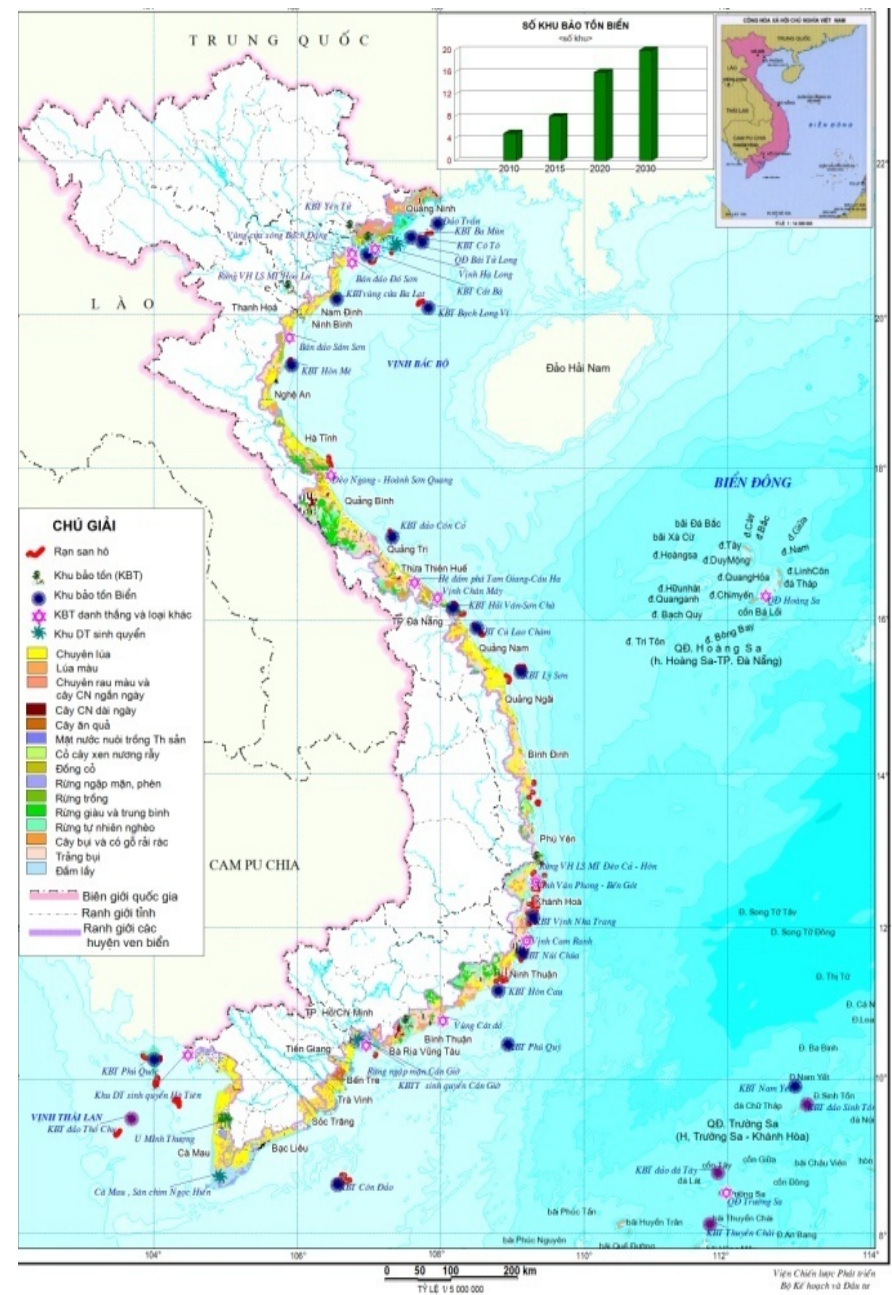
0 50 100 200 km

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Mangrove forests and marine conservation



Coral reefs and seagrass beds





Article 42 (the Law of the Sea)

Principles of marine economic development

Marine economy shall be developed in a sustainable and effective manner according to the following principles:

- Serving national socio-economic development;
- Staying attuned to the protection of state sovereignty, national defence, security, and safety and order in the sea;
- Meeting the need to manage marine natural resources and protect the marine environment;
- Promoting the socio-economic development of coastal localities and islands.

Challenges and Opportunities

- The growing number of different and competing interests makes management of Vietnam's sea much more difficult and complex. Therefore, the silo (sector-based) management has resulted in problems in both economic and ecological efficiency.
- Investment priorities do not work properly. Money spreads out in various projects.
- A high population density while underdeveloped infrastructure constrains the sustainable development. Increasing pollution is threatening the seas and ecology surrounding islands and beaches.
- S&T and human resources are key weak spots.
- Lack of understanding of marine environment and marine industries .

Challenges and Opportunities

- Pressure to change the legal framework and old management => holistic, integrated one.
- The participation of the private sector and communities in policy cycle and investment => raising their voice and money for marine projects.
- Change in national accounts to identify marine industries => Understanding more the contribution of marine economy.
- International cooperation in various aspects. No countries can solve all problems => improved S&T and human resources; applying international laws.
- Change the mindset/understanding the marine environment and marine industries.

THANK YOU!

