



HUY HOANG
GLOBAL FOOD

BREAKING NEWS

VIETNAMESE SEAFOOD

**20
26**



PANGASIOUS NEWS

OVERVIEW



In May 2026, Vietnam's pangasius exports reached USD 190 million, up 1% year-on-year. Cumulative exports in the first five months of 2026 totaled USD 910 million, an increase of 13%, indicating that the pangasius industry maintained positive growth despite divergent performances across export markets.

Growth was mainly driven by the Chinese market and the CPTPP markets, while exports to the U.S. market and the EU market continued to decline. In terms of product structure, frozen pangasius fillets remained the dominant export item, whereas value-added products still accounted for only a small share with limited improvement.





PANGASIUS NEWS



01)

CHINESE MARKET

China remained Vietnam's largest import market for pangasius. In May 2026, exports to China reached USD 49 million, up 12% year-on-year. Cumulative exports during the first five months amounted to USD 246 million, a sharp increase of 43%. Stable import demand continued to make China the key growth driver for Vietnam's pangasius industry in 2026.

02)

U.S. MARKET

Exports to the United States have yet to show clear signs of recovery. In May 2026, export value reached USD 31 million, down 24% year-on-year. During the first five months of the year, exports totaled USD 137 million, down 4%, reflecting continued weak consumer demand in the U.S. market.

03)

BRAZILIAN MARKET

The Brazilian market showed more positive signals in May, with export turnover reaching USD 17 million, up 2% year-on-year. However, cumulative exports for the first five months still stood at USD 74 million, down 5%, indicating that the recovery remains gradual.



PANGASIOUS NEWS

04) CPTPP MARKETS

Pangasius exports to the CPTPP markets continued to maintain solid growth. In May 2026, export value reached USD 34 million, up 11%, while cumulative exports for the first five months totaled USD 161 million, an increase of 19%.



Several member markets recorded strong growth, including **Mexico** with USD 37 million (up 42%), the **United Kingdom** with USD 28 million (up 20%), **Japan** with USD 20 million (up 22%), and **Canada** with USD 19 million (up 3%). These results reaffirm the CPTPP region as a stable and promising market for Vietnamese pangasius.

05) EU MARKET

In contrast to the CPTPP markets, exports to the EU continued to decline. In May 2026, export value reached USD 14 million, down 13% year-on-year, while cumulative exports in the first five months totaled USD 71 million, down 6%. The Netherlands, Vietnam's largest pangasius import market within the EU, imported USD 19 million, down 10%, indicating that demand in the region has yet to recover.

PANGASIUS NEWS

PRODUCT STRUCTURE AND OUTLOOK

During the first five months of 2026, products under **HS03** (fresh, frozen and dried pangasius) generated USD 894 million, accounting for approximately 98% of total pangasius export value and increasing 14% year-on-year. Among these, frozen pangasius fillets (**HS0304**) reached USD 751 million, remaining the industry's flagship export product. Meanwhile, value-added products (**HS16**) generated only USD 16 million, accounting for approximately 2% of total exports and declining 22% compared to the same period last year.



Amid ongoing volatility in the global market, expanding into new markets beyond traditional destinations, maximizing the benefits of free trade agreements (FTAs) and accelerating the development of value-added products will be key factors in enhancing export value and reducing the industry's dependence on a limited number of major markets.

PANGASIOUS NEWS

RAW MATERIAL SITUATION

At the 2026 Fisheries Science Conference, experts and industry representatives introduced a range of technical solutions and innovative technologies aimed at improving farming efficiency and promoting the sustainable development of Vietnam's pangasius industry. The technologies focused on disease prevention and control through vaccines, probiotics, bacteriophages, antimicrobial peptides and biological alternatives to antibiotics, while also improving seed quality, enhancing fish health and optimizing farming environment management.

The wider adoption of science and technology is expected to improve productivity, reduce production costs, enhance raw material quality and strengthen the competitiveness of Vietnam's pangasius industry in international markets. It also represents an important strategy for addressing increasing challenges such as climate change, environmental pollution and disease outbreaks in aquaculture.





SHRIMP NEWS

OVERVIEW

Vietnam's shrimp exports in the first five months of 2026 reached US\$1.9 billion, a 12% increase compared to the same period last year. Amidst the continued volatility of the global seafood market, this result demonstrates that the shrimp industry is maintaining positive growth momentum thanks to improved demand in several Asian markets, particularly China.

In terms of products, vannamei shrimp still accounts for the largest share with over 57.1% of total export value, followed by tiger shrimp at 9.5%. Other marine shrimp groups recorded the highest growth, increasing by 29% compared to the same period, reflecting the trend of diversifying supply sources and market demand for product lines beyond traditional whiteleg shrimp.



After the first five months of the year, Vietnam's shrimp industry has demonstrated its ability to adapt to fluctuations in the international market. Despite remaining challenges regarding costs and competition, the double-digit growth rate provides an important foundation for the industry to continue aiming for growth in the remaining months of 2026.

SHRIMP NEWS

01) CANADIAN MARKET

Canada tightens monitoring of lobster farming using satellite positioning

The Canadian Department of Fisheries and Oceans (DFO) has issued emergency regulations to tighten the management of lobster (*Homarus americanus*) fishing in the North Atlantic, aiming to reduce fishing pressure in key spawning areas in the Gulf of Saint Lawrence and the Nova Scotia shelf.

Under the new regulations, all fishing vessels are required to install vessel monitoring systems (VMS) that transmit location data every 15 minutes to the operations center. Previous regulations that exempted some smaller vessels under 12 meters have now been completely abolished. Violations will result in license suspension and confiscation of fishing gear for the season.

These new measures are expected to reduce short-term supply, putting upward pressure on prices in export markets such as the US, EU, and Asia. However, the regulatory body maintains that enhanced traceability is necessary to ensure sustainable certification and maintain the long-term competitiveness of the Canadian lobster industry.



SHRIMP NEWS

02) U.S. MARKET



The US – a market that had held the leading position for many years – continues to be a bottleneck for Vietnam's shrimp industry. Exports to the US in the first five months of the year reached \$228 million, a 22% decrease compared to the same period last year. Besides price competition from Ecuador and India, businesses also have to closely monitor developments in the Section 301 investigation as well as issues related to anti-dumping duties. These factors keep US buyers quite cautious about import activities.

Price differences for shrimp in the US have widened significantly across product segments.

According to Expana's pricing data, the price of Asian EZ-Peel vannamei shrimp is currently around \$4.82/pound, while Latin American HLSO shrimp is at \$3.81/pound. Thus, Asian EZ-Peel shrimp is being sold about \$1/pound higher than Latin American HLSO shrimp. This is a significant difference, indicating that the US market is pricing pre-processed products more favorably for restaurants, retailers, and consumers.

In another segment, the price gap between PDTO and EZ-Peel shrimp narrowed to a low point but has since recovered. Currently, PDTO is priced at around \$5.38/pound, approximately \$0.57/lb higher than EZ-Peel. This trend reflects a market not only influenced by overall supply and demand, but also differentiated by processing levels, product specifications, and usage requirements.



SHRIMP NEWS

03) CHINESE MARKET

China and Hong Kong continued to be the biggest growth drivers for Vietnamese shrimp in the first months of the year. Exports to this market reached over US\$711 million, a 46% increase compared to the same period last year, accounting for nearly 38% of the country's total shrimp export turnover. Stable demand for frozen shrimp products along with strong growth in lobster exports contributed to boosting exports to this market.

04) OTHER MARKETS

Other traditional markets recorded relatively stable developments. Exports to **Japan** and **South Korea** remained almost unchanged compared to the same period last year, while **the EU** maintained slight growth. Several markets such as **Australia, the UK, Canada,** and **Taiwan** continued to show positive growth, contributing to the diversification of outlets for Vietnamese shrimp products.





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SHRIMP NEWS

RAW MATERIAL SITUATION



Strengthen disease prevention measures in brackish water

Disease prevention and control activities in brackish water shrimp farming should be carried out according to the principle of "prevention is key," strengthening proactive monitoring and ensuring biosecurity at all stages of production.

For broodstock shrimp farms, the water supply must be treated through mechanical filtration and disinfected with chlorine, iodine, UV, or ozone to eliminate pathogens. Broodstock shrimp must be disease-free (SPF), of clear origin, and comply with current regulations. Feed must be of good quality, free from mold, and live feed should be tested for pathogens using PCR when necessary. At hatcheries, tanks must be cleaned and disinfected regularly, larvae treated with appropriate chemicals, and 100% of the post-larvae batches tested using PCR before sale.

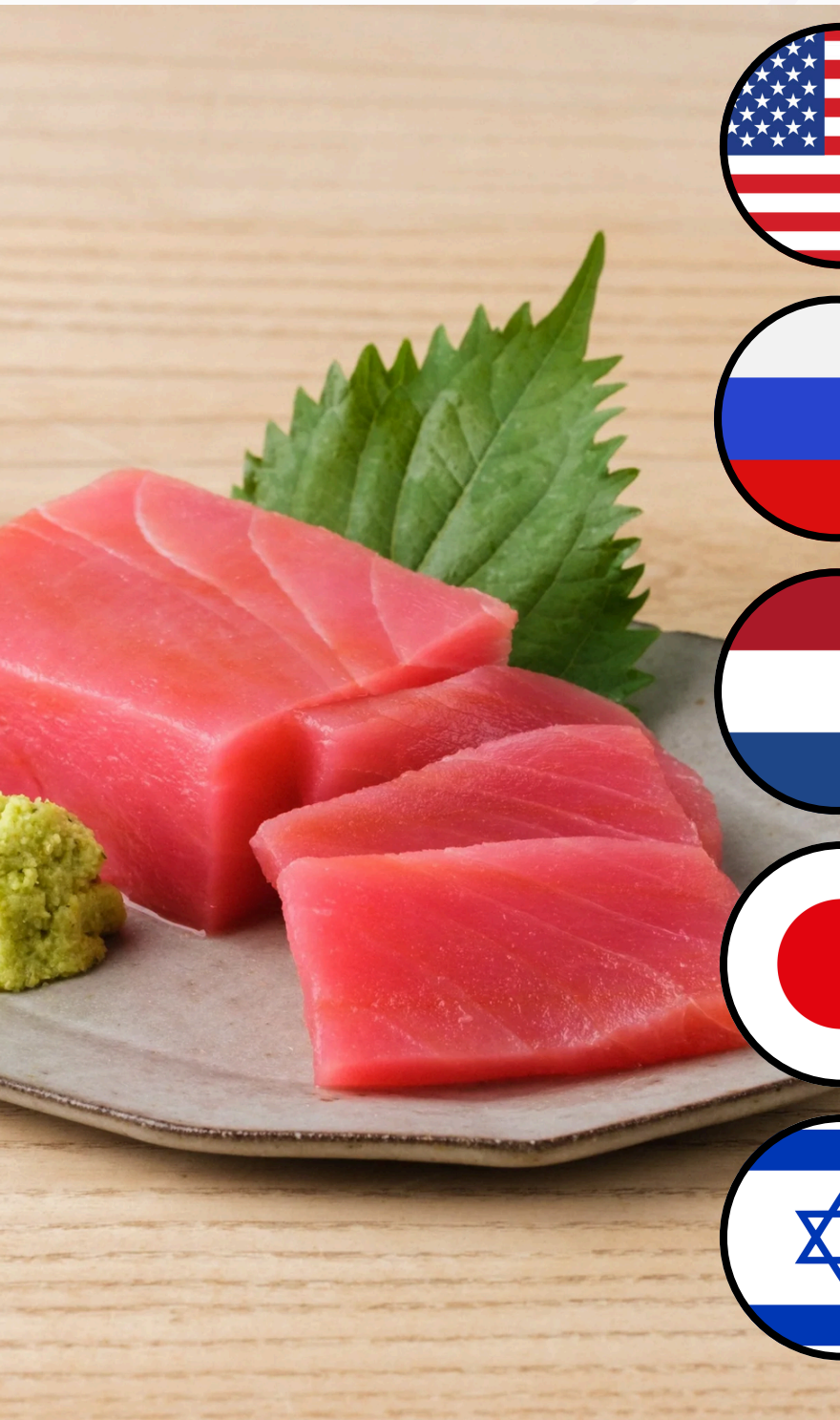
When a disease outbreak is detected, it must be reported promptly, the water source treated with chlorine, the affected shrimp destroyed according to regulations, and the spread limited. Monthly monitoring helps detect pathogens early, contributing to minimizing risks and stabilizing production.

TUNA NEWS

OVERVIEW

In the first five months of 2026, Vietnam's tuna exports reached 367 million USD, down 7% compared to the same period in 2025.

TOP 5 EXPORT MARKETS



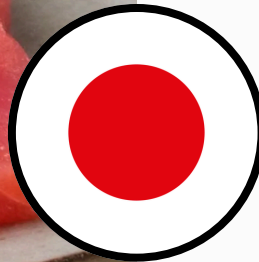
140 Million USD
-14%



23 Million USD
+67%



21 Million USD
-4%



16 Million USD
+1%



16 Million USD
+21%



TUNA NEWS



01) THE U.S. & THE EU MARKET

The United States remained the largest market, with export value exceeding 140 million USD and accounting for more than 38% of total export turnover, despite a 14% decline. Exports to **the EU** reached over 74 million USD, down by as much as 19%.

As the two largest markets, even a slight slowdown in demand is enough to weigh on the overall performance of the industry. In fact, the current decline appears to reflect not merely a short-term fluctuation, but a more cautious purchasing approach among importers.

02) OTHER MARKETS

Russia recorded export value of 23 million USD, up 67%, while exports to **Israel** increased by more than 21%, **Egypt** by over 50%, **the Philippines** by 18%, and **the UAE** by more than 32%. Exports to the Middle East as a whole rose by 16.7%, while shipments to CPTPP markets increased by 8.8%.

These figures suggest that Vietnam's tuna exports are no longer as heavily dependent on a few traditional markets as in the past. Russia, the Middle East, North Africa, and several CPTPP markets are increasingly helping to sustain export momentum, particularly as exporters seek destinations with stronger purchasing power and lower logistics pressures compared to more distant markets.

CRAB NEWS

CA MAU EXPANDS OFFICIAL EXPORTS OF CRAB

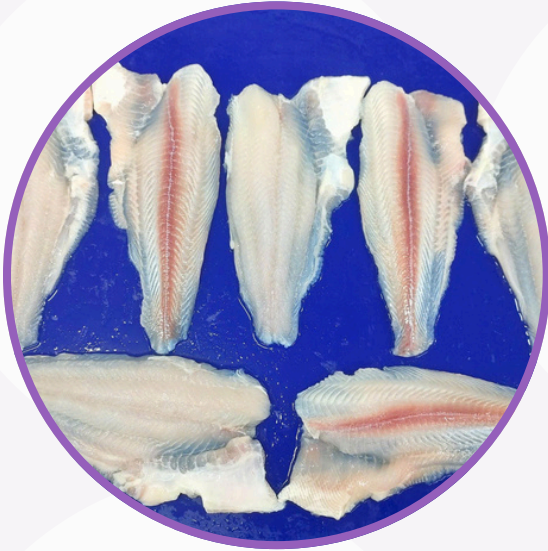
Ca Mau is stepping up efforts to develop its mud crab industry in a more professional and sustainable manner by establishing a raw material zone covering more than 30,400 hectares, with an annual output exceeding 14,500 tonnes. The province has also granted export codes to five enterprises engaged in official exports to markets including China, Cambodia, Singapore, and the United Arab Emirates.

Ca Mau currently has the largest mud crab farming area in Vietnam, covering more than 365,400 hectares. Output reached 21,339 tonnes in the first months of 2026, representing an increase of over 10% compared to the same period last year. The province also maintains 120 key farming zones spanning approximately 50,000 hectares and is expanding integrated shrimp–crab farming models, as well as promoting farming practices in line with VietGAP standards to enhance production efficiency.





GOOD ITEMS FOR SALES



FROZEN PANGASIOUS FILLET UNTRIMMED

- Pangasius hypophthalmus
- Boneless, Skinless, Red Meat ON, Fat ON, Belly ON, STPP treatment
- Size (grs/pc): 170/220; 220 up
- Packing: IQF, Bulk bag 10kg/ carton
- %Glazing: 0-30%

ASC FROZEN PANGASIOUS FILLET WELL-TRIMMED

- Pangasius hypophthalmus
- Skinless, Boneless, Belly Off, Fat Off, Red Meat Off, Chemical Free
- Size (grs/pc): 170/220; 220 up
- Packing: IQF, Bulk bag 5kg/ carton
- %Glazing: 0-30%



FROZEN INDIAN MACKEREL WHOLE ROUND, AAA GRADE

- Rastrelliger kanagurta
- Whole round, chemical-free
- Size (pcs/kg): 4/6; 6/8; 8/10; 10/12; 12/14
- Packing: IQF, Bulk bag 10kg/ carton
- %Glazing: 0-10%



GOOD ITEMS FOR SALES



FROZEN BABY CUTTLEFISH WHOLE CLEANED

- Whole cleaned, Skinless, Beak Off, Eyes Off, Gutted, No chemical
- 100% Net Weight with protective glazing
- Size (pcs/kg): 60up
- Packing: Block, 1kg/block, 10/ carton

FROZEN RAW BLACK TIGER HOSO

- Non-Chemical
- 100% Net Weight (TC/TW)
- Packing: Semi-IQF, 800 grs/ Box X 10/ Carton
- Size (pcs/pkt) Count per packet: 16/20, 21/25, 26/30



FROZEN RAW VANNAMEI PDTO

- STPP as EU Standard
- 100% Net Weight (TC/TW)
- Packing: IQF, 1kg/ PE bag with rider X 10/ Carton
- Size (Pcs/lb): 13/15, 16/20, 21/25, 26/30



THANKS FOR READING

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