



HUY HOANG
GLOBAL FOOD

BREAKING NEWS

**VIETNAMESE
SEAFOOD**



Presented By
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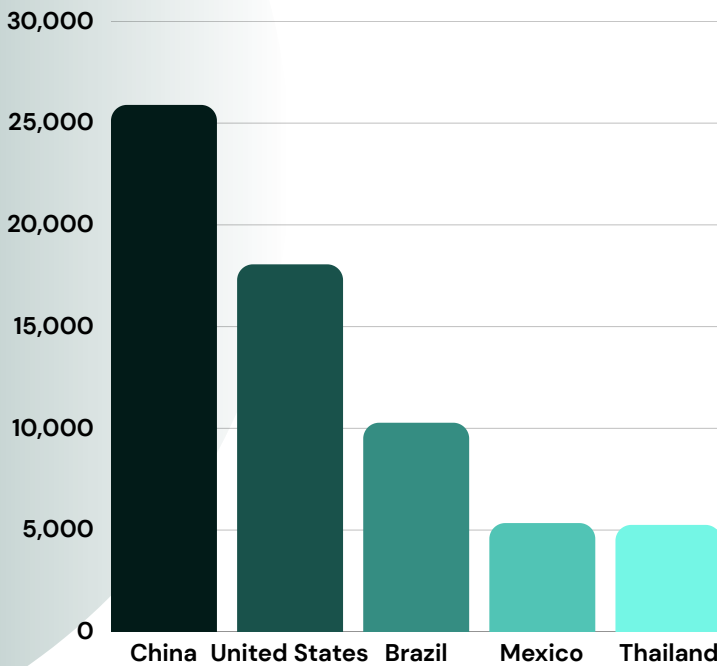




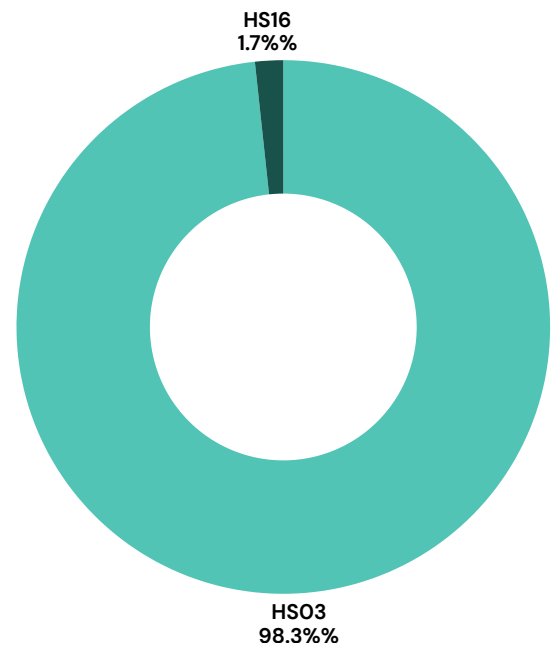
PANGASIOUS NEWS

OVERVIEW

Key pangasius import markets of Vietnam (Jan 1 – Mar 15, 2026)



Export product structure (Jan 1 – Mar 15, 2026)



During the period from January 1 to March 15, 2026, Vietnam's pangasius exports were mainly concentrated in China, followed by the United States and Brazil, while markets such as Mexico and Thailand accounted for smaller shares.

The product structure was dominated by HS03 (98.3%), indicating that exports are still largely composed of raw or minimally processed products, with limited value addition.



PANGASIOUS NEWS

CHINESE MARKET

China remains the largest market, accounting for around 28% of total pangasius export value. In the first two months of 2026, exports reached approximately USD 94 million, up 86% due to stocking demand early in the year. However, this market is still largely price-driven, putting pressure on pricing competition and creating high dependency.

THE USA MARKET

The USA accounts for about 11% of total exports but shows signs of slowdown due to trade barriers and cautious demand. In the first two months of 2026, exports reached approximately USD 38 million, down 5%. This market requires high standards in quality, traceability, and sustainability, forcing exporters to upgrade their production chains.



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PANGASIUUS NEWS



BRAZILIAN MARKET

Brazil is a bright growth spot, accounting for around 9% of total exports. In 2025, exports reached about USD 176 million, up 36%, and continued to grow in early 2026. This market is considered highly potential, offering stable demand and fewer barriers compared to the USA and EU.



EU MARKET

The EU accounts for approximately 18% of total export value and has remained relatively stable over the years. In the first two months of 2026, exports reached around USD 26 million, up 7%. However, the EU imposes strict requirements on environmental standards and traceability, making it suitable for value-added products but difficult to expand rapidly.

PANGASIU NEWS



CPTPP MARKETS

The CPTPP bloc accounts for about 18% of total exports, reaching approximately USD 340 million in 2025, up 37%. In early 2026, exports to this bloc continued to grow by over 23%, highlighting strong momentum driven by tariff advantages and stable demand.

OVERALL

Vietnam's pangasius export structure remains concentrated in a few major markets (China, the USA, and Brazil), while blocs such as CPTPP and ASEAN are emerging as new growth drivers. However, rising production costs, stricter quality requirements, and the global shift toward value-added products are forcing the industry to restructure toward market diversification and higher value creation.



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PANGASIOUS NEWS

RAW MATERIAL SITUATION

In the Mekong Delta, particularly in provinces such as An Giang, Dong Thap, and Can Tho, pangasius raw material supply is being restructured toward a circular economy model to enhance product value and reduce environmental impact.

The reuse of pond sludge as organic fertilizer helps increase agricultural productivity and reduce chemical fertilizer use by 30–50%, thereby lowering costs, improving soil fertility, and minimizing environmental pollution. At the same time, companies such as Vinh Hoan Corp are promoting closed-loop production chains, taking control from broodstock to processing while utilizing by-products to create value-added products.

The linkage model between enterprises and farmers also helps ensure stable supply while improving raw material quality through safe farming practices, disease control, and reduced antibiotic use. As a result, pangasius raw materials are not only secured in volume but also improved in quality and sustainability.



SHRIMP NEWS

OVERVIEW

During week 12/2026 (March 16–22), the Asian farmed shrimp market showed signs of recovery in some countries thanks to the trading atmosphere of the North American Seafood Fair, while shrimp prices in China and Vietnam continued to face a downward trend.

Following the Lunar New Year, weak consumer demand caused shrimp prices in **China** to fall for three consecutive weeks, erasing all gains from the beginning of the year and approaching production costs, putting farmers at risk of losses. **Ecuador** recorded signs of price recovery, with 30/40 size shrimp increasing by 2.8%, 40/50 by 1.6%, and 60/70 by 1.8%, while larger 20/30 size shrimp remained stable. In **India**, shrimp prices have stabilized after a period of decline, although they are still about 8% lower than the same period last year. **Indonesia** maintained stable prices, 3–8% higher than in 2025. Conversely, **Vietnam** continued its downward trend due to increased supply and the tendency to harvest early to avoid the risk of further price drops.



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SHRIMP NEWS

CHINESE MARKET

China's shrimp imports surged in the first two months of 2026, primarily due to seasonal factors related to the Lunar New Year. January saw imports of 94,707 tons (+36% year-on-year), and February reached 71,379 tons (+15%), bringing the total import volume to 166,086 tons (+26%). The value reached US\$869 million (+18%), with January accounting for US\$505 million and February for US\$364 million.

In terms of supply, Ecuador continued to lead with 129,040 tons (+29%), thanks to its advantage of whole shrimp for peak season. India ranked second with 22,552 tons (+41%), mainly exporting processed shrimp. Thailand, Saudi Arabia, and Indonesia also recorded positive growth.

Conversely, Argentina experienced a sharp decline, with total volume reaching only 1,701 tons (-52%) in the first two months of the year.





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SHRIMP NEWS

UK MARKET

Amidst the volatile global seafood trade fueled by geopolitical conflicts and increasing protectionist trends in major markets, the UK is considered a stable destination for Vietnamese shrimp. Following Brexit, the country has not only maintained a strong import demand but has also gradually reshaped its supply chain towards diversification of sources.

The UK has high seafood consumption but is heavily reliant on imports. By 2025, approximately 58% of its seafood supply is expected to come from abroad, with shrimp alone reaching 99%. This underscores the crucial role of exporting countries, including Vietnam, in securing supply for this market.

Shrimp is one of the most popular consumer products in the UK, widely available in both retail and food service channels. Popular products on the market include frozen peeled shrimp, steamed shrimp, battered or fried shrimp, as well as convenient products for salads, sandwiches, and ready-to-eat meals. This consumer trend shows a clear preference for convenient products, fitting the fast-paced lifestyle and modern retail system in the UK.





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SHRIMP NEWS

AUSTRALIAN MARKET



Australia is emerging as one of the stable and potentially growing markets for Vietnamese shrimp. In the context of global trade being significantly impacted by geopolitical tensions, particularly conflicts in the Middle East, consolidating and expanding into highly stable markets like Australia is becoming increasingly important for the Vietnamese shrimp industry.

According to international trade data, Australia has a significant demand for shrimp imports due to limited domestic supply. Total shrimp imports are projected to fluctuate between US\$317 million in 2021 and US\$360.5 million in 2025, with some variation due to consumption cycles and inventory levels.

In terms of supply structure, Vietnam is the largest exporter of shrimp to Australia, accounting for approximately 65–70% of the market's total import value. Thailand typically ranks second with around \$45–57 million annually, primarily from processed shrimp, while China and Malaysia account for smaller shares.



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SHRIMP NEWS

RAW MATERIAL SITUATION

In line with the restructuring plan for the fisheries sector, Can Tho City is gradually reducing coastal fishing and focusing on aquaculture development, with shrimp farming identified as a key area. The city prioritizes high-tech shrimp farming models to increase productivity, control diseases, and meet international standards, especially regulations against IUU (Illegal, Unreported, and Unregulated) fishing.

To support farmers, the agricultural sector has implemented an environmental monitoring system at 48 locations, taking water samples four times a month with over 980 samples analyzed. Regularly updated data helps farmers proactively adjust production and reduce risks.

In addition, numerous training programs on technical skills, disease management, and environmental protection have been organized. The city has also implemented a sustainable aquaculture development project with over 992 billion VND in funding, focusing on improving infrastructure and the value chain.



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TUNA NEWS

JAPANESE MARKET

According to data from Vietnam Customs, the country's tuna exports to Japan increased in the first two months of 2026 compared to the same period last year. This growth was largely driven by a strong performance in January 2026, when export value exceeded 4 million USD, nearly doubling year-on-year. However, exports declined in February 2026 to just over 2 million USD, down 30% compared to the same period.



Nevertheless, the Japanese market continues to show positive signals for Vietnamese tuna. In 2025, Vietnam's tuna exports to Japan reached approximately 36 million USD, up nearly 10% compared to 2024. In January 2026 alone, Japan was among the fastest-growing markets for Vietnamese tuna, in contrast to the declining trend seen in the United States.

In terms of supply structure, Vietnam faces strong competition from key players including China, Chinese Taipei, Thailand, Indonesia, and South Korea.



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CRAB NEWS

OVERVIEW

Amid ongoing volatility in global seafood trade, Vietnam's crab exports have made a strong start in 2026. According to Vietnam Customs data, export value in the first two months of the year reached nearly 55 million USD, up 24% compared to the same period in 2025 and more than 2.2 times higher than the same period in 2024. This performance signals a more positive growth trajectory for crab exports in 2026, particularly in Asian markets.



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CRAB NEWS

CHINESE MARKET

China has consistently accounted for the largest share of Vietnam's crab exports, representing over 50% over the past two years. In the first two months of 2026 alone, exports to China exceeded 36 million USD, making up 67% of total export value. When combined with Hong Kong, the share of this market cluster rises to 68%. This highlights that the current growth momentum of Vietnam's crab exports is largely driven by strong demand from nearby markets, characterized by fast consumption and high absorption capacity, particularly in China.

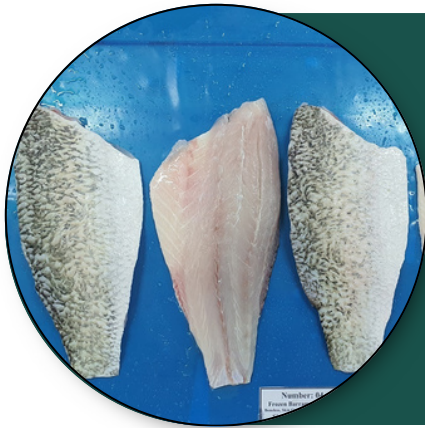
JAPANESE & THE USA MARKET

Japan remained the second-largest market, with export value exceeding 12 million USD and accounting for 22% of the total, though it declined by 9% compared to the same period. The United States reached nearly 4 million USD, representing close to 7%, with a sharp increase of almost 194%; however, its share remained relatively modest in the first two months of the year.



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GOOD ITEMS FOR SALES



FROZEN BARAMUNDI FILLET

- EUtreated
- SkinOn, Boneless, No Chemical
- 70% NW, 30% glazing
- Size: 170 – 250 gr/pc
- Packing: IQF bulk pack 10kg/carton



ASC FROZEN RAW PANGASIOUS FISH CUBE WELL-TRIMMED

- Light treated
- 90% NW, 10% GLZ
- Size: 15-25 grs/pc
- Packing: IQF, 5kg/ PE Bag with Rider x 2/ carton



FROZEN PANGASIOUS FILLET

- Skin on fillet, Fat off, Belly off, Boneless, 10% STPP (MOISTURE 85+-1), not EU standard
- Size: 300-400g, 400-500g, 500-600g
- 100%NW and 80% NW
- Packing: 2.5kg/bag x 4 bags/ctn

GOOD ITEMS FOR SALES



FROZEN RAW VANNAMEI PDTO

- Headless, Shell-less, Peeled, Deveined, Tail on, STPP as EU's standard
- 100% Net Weight
- Size (pcs/lb): 16/20; 26/30; 31/40; 41/50
- Packing: IQF, 1kg plain bag with rider x 10kg/carton



FROZEN TEMPURA SHRIMP

- 40% shrimps 60% breading, Treated STPP + Salt
- Size (grs/pc): 25
- Packing: 750grx10 in box



FROZEN COOKED WHITE CLAM WITH SHELL

- Broken pieces < 5%, no chemical
- Size: 40/60; 60/80 pcs/kg
- Packing: IQF, 1kg/vacuum pack with rider, 10 bags/flexo carton



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THANK YOU



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