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BREAKING NEWS

VIETNAMESE SEAFOOD

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PANGASIUS NEWS

OVERVIEW

In the first two months of 2026, Vietnam's pangasius exports to CPTPP markets continued to maintain a positive growth trend, reaffirming their role as one of the industry's key markets. By the end of February 2026, export turnover reached USD 59 million, accounting for approximately 18% of Vietnam's total pangasius export value, ranking second after China & Hong Kong, with a growth rate of 23% compared to the same period in 2025.

However, in February alone, export value recorded a short-term adjustment, reaching USD 22 million, down 7% year-on-year. This development reflects temporary market fluctuations but does not alter the overall upward trend of the CPTPP market bloc.



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PANGASIOUS NEWS

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► MEXICAN MARKET

The Mexican market is the leading growth driver within the bloc, reaching USD 16 million in the first two months (up 71%). In February, exports continued to grow by 25%, indicating that demand is stable rather than seasonal. Pangasius products are favored due to their competitive pricing and convenience. This consumption trend has been established since 2025 and continues into 2026, creating significant room for Vietnamese enterprises to expand exports.

► JAPANESE MARKET

The Japanese market recorded USD 8 million in exports (up 43%), with February reaching USD 3 million (up 11%), indicating a clear recovery in demand. Pangasius has been introduced into the menu of the Kura Sushi chain since 2025, marking an important step in penetrating the local food service system. This reflects a more flexible consumer attitude toward farmed fish and opens up potential for further market share expansion in the future.



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PANGASIOUS NEWS

› UK MARKET

The UK market reached USD 10 million in exports (up 35%), with February accounting for USD 4 million (up 21%). This growth is driven by limited supply of wild-caught whitefish such as Norwegian cod and Russian pollock, leading to higher prices and a shift toward farmed fish like pangasius. At the same time, consumer preferences in the UK are increasingly oriented toward convenient products, providing more opportunities for processed pangasius and value-added products, thereby enhancing export value.

› CANADIAN MARKET

In contrast to the overall trend, the Canadian market recorded a decline of 8% in the first two months, with a sharp drop of 21% in February. This suggests the market is facing short-term challenges, possibly related to consumer demand or competitive pressure.

PANGASIOUS NEWS

RAW MATERIAL SITUATION

Pangasius shifts from “volume” to “value” in 2026

In 2026, Vietnam's pangasius industry is transitioning from volume-driven growth to value-driven development, focusing on quality, food safety, and sustainability.

Farming area in the Mekong Delta remains stable at over 6,000 hectares. In 2025, production reached 1.67 million tons, with export value exceeding USD 2.2 billion (up 8%). Deep-processed and value-added products recorded strong growth, particularly in the US market. China remains the largest market, accounting for 27% of total share; CPTPP reached USD 340 million (up 17%); while Russia and the Eurasia region saw a strong increase of 35%.

The industry faces challenges from climate change, rising production costs (USD 1.2–1.3/kg), seed quality issues, tariff barriers (20% in the US), and increasing international competition. According to Phùng Đức Tiến, the sector needs comprehensive restructuring toward higher quality, reduced emissions, and compliance with international standards to strengthen its global position.





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SHRIMP NEWS



OVERVIEW

During week 14 (March 30 - April 5, 2026), raw vannamei shrimp prices in major producing countries recorded a simultaneous downward trend – a rare occurrence recently. India, Thailand, China, and Vietnam all saw price decreases, while Ecuador remained stable and Indonesia was the only market to experience a price increase.

Notably, this downward price trend occurred amidst sharply rising transportation, fuel, and packaging costs, pushing the global shrimp industry into a phase of "falling prices - rising costs."

Shrimp prices in Vietnam have fallen across all sizes. Increased stocking since the end of February is expected to lead to a recovery in supply in April-May, putting pressure on prices. Processing plants are also being more cautious in their purchasing.



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SHRIMP NEWS

THAILAND MARKET

Prices for vannamei shrimp in Thailand recorded a slight downward trend at the end of March 2026, amidst pressure from abundant supply and weakening global prices.

According to the Samut Sakhon Shrimp Traders Association, raw shrimp prices at wholesale markets fluctuated widely depending on size and quality. Specifically, large shrimp (38–40 pieces/kg) reached approximately 173 baht/kg, while medium-sized shrimp (56–60 pieces/kg) were priced at around 137–128 baht/kg. For smaller shrimp, prices dropped to around 90–100 baht/kg for the 90–100 pieces/kg size.

Price trends indicate widespread downward pressure across most size segments, reflecting the impact of increased global supply, particularly from Ecuador, coupled with a market demand that has not yet recovered strongly. In the short term, Thai shrimp prices are expected to continue fluctuating in line with international market trends.





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SHRIMP NEWS

US MARKET



US shrimp imports continued their downward trend in the early months of 2026 after a sharp decline in the second half of 2025. In January 2026, the US imported 66,935 tons, down 6% year-on-year; in February, imports reached 58,198 tons, down 8%. Cumulative imports for the first two months totaled 125,133 tons, down 7% year-on-year. In terms of value, imports reached \$630 million in January (unchanged) and \$513 million in February (down 7%), bringing the total value to \$1.135 billion, down 3%.

Regarding supply, Ecuador continued its strong growth with 41,243 tons, up 25%, while India experienced a sharp decline to 38,395 tons, down 31%. Indonesia reached 23,329 tons, up 6%; Vietnam reached 8,071 tons, down 6%; and Thailand reached 5,302 tons, up 19%.



SHRIMP NEWS

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JAPANESE MARKET

Japan continues to be one of Vietnam's important and stable shrimp markets.

According to data from Vietnam Customs, as of March 15, 2026, Vietnam's shrimp exports to Japan reached US\$89 million, a 2% increase compared to the same period last year, accounting for 10.4% of Vietnam's total shrimp exports to all markets. Japan is currently Vietnam's third largest shrimp consumer market, after China and the EU.

The structure of Vietnam's shrimp exports to Japan remains relatively stable. Vannamei shrimp continues to be the main product. In 2025, vanamei shrimp exports to Japan reached US\$386.7 million, accounting for approximately 65-70% of the total export value. Black tiger shrimp ranked second with US\$93.2 million and continues to play an important role in the high-value segment.



SHRIMP NEWS

RAW MATERIAL SITUATION

› **WHITE SPOT SYNDROME (WSD) IN SHRIMP: CAUSES AND SYMPTOMS**

White Spot Syndrome Virus (WSD), caused by WSSV, is one of the most dangerous diseases in shrimp farming, causing significant economic losses.

The disease can appear at any stage of shrimp development, and is particularly prone to outbreaks when the environment fluctuates, especially during seasonal transitions. In Vietnam, outbreaks are seasonal and account for 40–50% of all shrimp outbreaks annually.

WSSV spreads rapidly both horizontally and vertically, from the water environment, feed, diseased shrimp carcasses to the larvae. Infected shrimp often stop eating, swim weakly, develop white spots on their shells, and can die in large numbers within a few days, with mortality rates reaching 80–100%.

Currently, there is no specific treatment; therefore, prevention is key. Farmers need to control the pond environment, select disease-free larvae, and conduct regular testing using methods such as PCR to detect the disease early and minimize losses.



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TUNA NEWS

SPANISH MARKET

Vietnam's tuna exports to Spain rose by 13% in 2025 compared to 2024, and this upward trend continued into the first two months of 2026.

According to Vietnam Customs data, export turnover to this market reached nearly 3 million USD in January–February 2026, up 101% compared to the same period in 2025 and significantly higher than in the same period of 2024. This development suggests that Spain is re-emerging as a notable destination for Vietnamese tuna, amid sustained strong demand for tuna raw materials and products in the European market.



TUNA NEWS

UAE MARKET

According to Vietnam Customs data, Vietnam's tuna exports to the UAE reached nearly 6 million USD in 2025, up 24% compared to 2024. More notably, in the first two months of 2026, export turnover to this market climbed to nearly 2 million USD, marking a sharp increase of 256% compared to the same period in 2025.

The UAE is currently one of Vietnam's fastest-growing tuna markets in early 2026. While the low base in the same period of 2025 partly explains this surge, the 256% increase still reflects a highly positive trend. If export momentum is maintained in the second quarter and the benefits of the CEPA agreement are effectively leveraged, tuna exports to the UAE are expected to sustain their growth trajectory this year.





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CLAMS NEWS



OVERVIEW

After recording solid growth in 2025, Vietnam's clam exports entered 2026 with even more positive momentum. According to Vietnam Customs data, clam export turnover reached 120 million USD in 2025, up 21% compared to 2024. In the first two months of 2026 alone, clam exports exceeded 18 million USD, rising 26% year-on-year. Notably, exports in January 2026 surpassed 10 million USD, indicating a strong export pace at the beginning of the year.

THE EU MARKET

In terms of export market structure, the EU continued to be the main pillar for Vietnam's clam exports. In the first two months of 2026, **Italy** moved to the top position with 5 million USD, followed by **Spain** with 4.5 million USD, and **Portugal** with 3 million USD.



CLAMS NEWS

THE US MARKET

Beyond the EU, the United States remained a bright spot for Vietnam's clam exports, with imports rising 57% in 2025 and continuing to grow by 39% in the first two months of 2026, reaching 2 million USD. The market still offers considerable room for imported products, as nearly 80% of seafood consumed in the United States is imported. This creates significant opportunities for Vietnamese exporters, provided they can maintain strong traceability, food safety standards, and consistent product quality.

ASIAN MARKET

In contrast, the Asian market is showing clearer signs of divergence. In the first two months of 2026, exports to China fell by 18%, while shipments to **South Korea** and **Japan** both declined by 31%. This indicates that exporters cannot rely solely on a few nearby markets, but need to be more flexible in terms of product offerings, specifications, and sales channels.





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GOOD ITEMS FOR SALES

▶ FROZEN PANGASIU FILLET WELL-TRIMMED

- Pangasius hypophthalmus
- Boneless, Skinless, Red Meat OFF, Fat OFF, Belly OFF, STPP Treated
- 90% Net Weight, 10% Glazing
- Size (grs/pc): 170/220; 220 up
- Packing: IQF, Bulk bag 10kg/ carton



▶ FROZEN BARRAMUNDI FILLET SKIN ON

- Lates Calcarifer
- Skin on, Boneless, No Chemical
- 80% Net Weight, 20% Glazing
- Size (grs/pc): 200/300; 300/500; 500 up
- Packing: IQF, Bulk bag 10kg/ carton

▶ FROZEN YELLOWFIN TUNA CUBES

- Thunnus Albacares
- CO Treated
- 100% Net Weight
- Size: 2x2x2
- Packing: IQF, PA bag x 1kg Vacuum bag/ 10kg carton





GOOD ITEMS FOR SALES



▶ FROZEN RAW NOBASHI VANNAMEI

- 100% Net Weight, STPP 2%, SALT 1%
- Size: 11, 13, 15, 20 grs/pc
- Packing: Vacum tray, 20 Pcs/ tray

▶ FROZEN GIANT SQUID RINGS

- 90% Net Weight, 10% Glazing
- Size: 3-7cm
- Packing: 1kg plain bag with rider x 10/master carton



▶ FROZEN VANNAMEI SHRIMP COOKED HOSO

- Head on Shell on, no agar, no chemical, 100% net
- Size (pcs/kg): 16/20, 21/25, 26/30
- Packing: Semi-block, 780g (net)/box, 10 boxes/carton



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