



HUY HOANG
GLOBAL FOOD

BREAKING NEWS

Vietnamese Seafood



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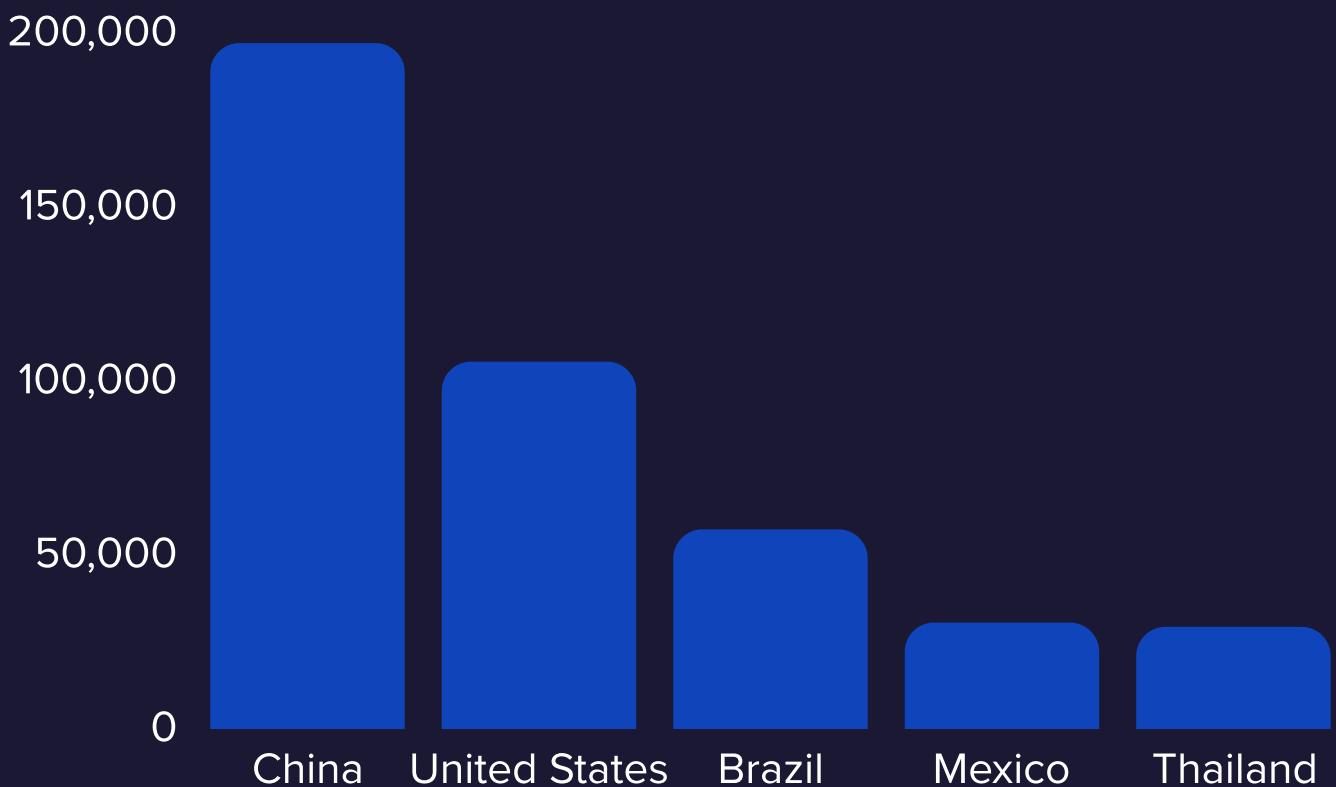


PANGASIOUS NEWS

OVERVIEW

SOME OF VIETNAM'S MAIN PANGASIOUS IMPORT MARKETS

From January 1 to April 30, 2026



Vietnam's pangasius exports continued to maintain positive growth momentum during the first months of 2026. According to Vietnam Customs data, pangasius export turnover in April 2026 alone reached USD 206 million, up 18% compared to the same period last year. Accumulated export value in the first four months of 2026 reached USD 720 million, an increase of 17%, indicating a clear recovery in demand across many major markets.



PANGASIOUS NEWS

CHINESE MARKET

China continued to maintain its position as the largest import market for Vietnamese pangasius. In April 2026, exports to this market reached USD 53 million, up 26%; accumulated export turnover in the first four months reached USD 197 million, surging 54% (the highest growth rate among key markets) and accounting for nearly 27% of the industry's total export value.

Consumer demand in China has recovered rapidly after a cautious period, while geographical proximity and favorable bilateral trade relations are helping Vietnamese pangasius expand its market share significantly.

U.S. MARKET

The United States remained the second-largest market for Vietnamese pangasius, with export turnover in April reaching USD 39 million, up 20%. However, cumulative exports in the first four months only reached USD 106 million, up 4%, much lower than the growth rate recorded in China.

Although exports have recovered after a prolonged decline, Vietnamese pangasius in the U.S. market is still facing pressure from tariffs, costs, and strong competition from other whitefish products.





PANGASIOUS NEWS

BRAZILIAN MARKET

Brazil remained the largest pangasius consumption market in Latin America. In April, exports to Brazil reached USD 17 million, up 13%; however, cumulative exports in the first four months only reached USD 57 million, down 7% compared to the same period last year.

This development shows that demand in Brazil is slowing down in the short term, while also requiring enterprises to restructure markets and improve product competitiveness.

EU MARKET

Exports to the EU in the first four months of 2026 reached USD 57 million, down 4%. However, April alone recorded a slight recovery of 5%, reaching USD 17 million.

The EU market is gradually recovering but is still affected by strict import standards and consumer demand that has not yet fully rebounded.

CPTPP MARKET

The CPTPP bloc continued to be a bright spot for Vietnamese pangasius exports, with export turnover in the first four months reaching USD 128 million, up 21% year-on-year.

Tariff incentives and stable demand among member countries are creating positive growth opportunities for Vietnamese pangasius in 2026.



PANGASIOUS NEWS

ASEAN MARKET

In the first quarter of 2026, Vietnam's pangasius exports to ASEAN reached USD 44 million, up 7%. After slowing down in February, exports recovered strongly in March with turnover reaching USD 18 million. This development indicates that pangasius import demand in ASEAN remains stable according to seasonal cycles despite short-term fluctuations.



Thailand continued to be the largest market within the bloc with USD 24 million, while the **Philippines** and **Malaysia** both reached USD 9 million. Other markets such as **Brunei**, **Indonesia**, and **Laos** remained relatively small in scale; however, the presence in these markets reflects the long-term geographical expansion of Vietnamese pangasius within the region.

ASEAN is increasingly emerging as a strategic market thanks to its geographical proximity, lower logistics costs, and consumer demand that matches Vietnamese pangasius products. This advantage is further strengthened as the global supply of whitefish tightens and prices of cod and pollock remain high. Amid continuing uncertainties in the U.S. market, ASEAN is considered an important direction for export diversification.

PANGASIOUS NEWS

PRODUCT STRUCTURE

Frozen pangasius products under HS03 continued to dominate Vietnam's pangasius exports in the first four months of 2026, accounting for 98% of total export turnover. Frozen pangasius fillets (HS0304) remained the key export product with USD 594 million, up 20% and representing more than 82% of total exports. Meanwhile, value-added products under HS16 only reached USD 13 million, down 16% and accounting for less than 2%, indicating that Vietnam's pangasius industry still relies heavily on primary processed products while the deep-processed segment continues to hold significant growth potential.



Export results in the first months of the year show that Vietnam's pangasius industry is maintaining positive growth momentum, mainly driven by the Chinese market, CPTPP, and ASEAN. However, enterprises still need to pay attention to factors such as exchange rate fluctuations, logistics costs, and the increasing trend of trade defense measures.

In the coming period, diversifying export markets, increasing the proportion of value-added products, and investing in sustainable farming areas will continue to be important directions to enhance export value and maintain long-term growth for Vietnam's pangasius industry.



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PANGASIOUS NEWS

RAW MATERIAL SITUATION



Vietnam's Pangasius Industry Restructures from Fingerling Stage to Enhance Competitiveness

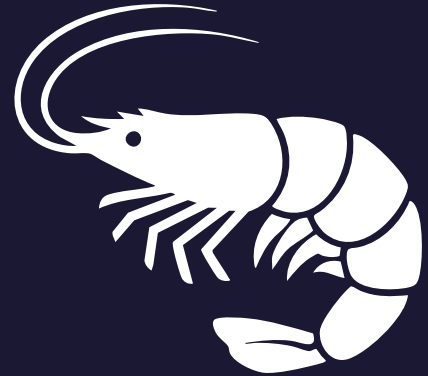
Vietnam's pangasius industry is accelerating its restructuring process starting from the fingerling stage in order to improve productivity, product quality, and reduce production costs. The G5 pangasius breeding program has shown positive results with a higher growth rate, helping improve commercial farming efficiency and reduce feed conversion ratios.

In addition, many provinces in the Mekong Delta are strengthening the application of science and technology, developing high-quality breeding systems, enhancing disease control, and improving traceability to meet increasingly strict requirements from import markets.

Amid intensifying international competition, improving fingerling quality is considered a key foundation for enhancing the competitiveness of Vietnam's pangasius industry, increasing export value, and moving toward sustainable development.



SHRIMP NEWS



OVERVIEW

Vietnam's shrimp exports in the first four months of 2026 continued their positive growth momentum, reaching approximately US\$1.5 billion, a 15% increase compared to the same period last year. However, behind this result lies a contrasting trend across markets, as the global shrimp industry continues to be impacted by inflation, high inventory levels, price competition, and increased trade risks.



Outlook for the coming months

Forecasts for May and subsequent months indicate that Vietnam's shrimp exports still have the opportunity to maintain growth thanks to relatively strong demand from China and the stability of markets such as Japan, the UK, and the CPTPP bloc. However, the US market is unlikely to recover quickly due to high inventory levels, weak purchasing power, and prolonged trade risks. In the context of increasingly fierce global competition, the Vietnamese shrimp industry will need to focus more on deep processing, cost optimization, improved traceability, and sustainable development to maintain its competitive advantage in the future.



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SHRIMP NEWS

US MARKET

In the first week of May 2026, the price of farmed vannamei shrimp from Asia in the US import market continued its downward trend, while the price of Ecuadorian shrimp generally remained stable, reflecting the increasingly clear divergence in the global shrimp market.



According to data from the US wholesale market, prices for many shrimp products from India and Indonesia have fallen below April levels due to high inventory pressure and slow recovery in consumer demand. Importers say that previously contracted low-priced shipments are arriving at ports en masse, causing a sharp increase in market supply and continuing to put pressure on spot prices.

Conversely, Ecuadorian shrimp prices remained relatively stable across most sizes during the same period. US importers assessed that supplies from Ecuador had the advantage of shorter shipping times and greater flexibility in managing supply compared to Asia.



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SHRIMP NEWS



CHINESE MARKET

In the first quarter of 2026, China's shrimp import market recorded a significant recovery after a period of stagnation at the end of 2025. This development indicates gradually improving domestic consumption demand and reflects the flexible adjustments of importers in response to global price and supply fluctuations.

According to statistics, China's total shrimp imports in the first three months of 2026 reached 250,192 tons, a 25% increase compared to the same period last year. Individually, January saw imports of nearly 94,707 tons (+36%), February 71,379 tons (+15%), and March 84,105 tons (+24%). This represents significant growth compared to the end of 2025, when imports declined consecutively in November (-3%) and December (-9%).





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SHRIMP NEWS

UK MARKET



Many major retailers in the UK and Europe are increasingly demanding animal welfare in their seafood supply chains, including the farmed shrimp industry. Recently, the Aldi Süd retail chain announced its goal of ending the eye-clotting of broodstock shrimp in its supply chain by 2030 and implementing electrostunning of farmed shrimp before slaughter by 2035.

With this move, all 11 major supermarket chains in the UK have now made time-limited commitments related to shrimp welfare in their supply chains. To support producers in meeting this new trend, the UK-based non-profit Shrimp Welfare Project (SWP) announced it has signed 30 memoranda of understanding with shrimp farming businesses in India, Southeast Asia, and Latin America to provide free electrostunning equipment, technical training, and operational support. The program applies to farms with an annual production of 1,900 tonnes or more.



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SHRIMP NEWS

RAW MATERIAL SITUATION

Summer, with its high temperatures and prolonged sunshine, causes significant fluctuations in the shrimp farming environment, increasing the risk of algal blooms. According to experts, controlling algae and maintaining stable water color are crucial factors in protecting shrimp health and minimizing losses during the hot season.

Algae play a role in providing oxygen, absorbing excess organic matter, and creating a natural food source for shrimp. However, when overgrown, algae can disrupt the water balance. During the day, photosynthesize, increasing pH and oxygen levels, but at night they consume a lot of oxygen, easily causing shrimp to surface, reduce their food intake, and become stressed. In particular, algal die-offs can generate toxic gases such as NH_3 , NO_2 , and H_2S , seriously affecting the hepatopancreas and gills of shrimp.

Among them, blue-green algae are considered the most dangerous group due to their ability to produce toxins, causing shrimp to grow slowly and increasing the risk of scattered mortality. To mitigate risks, farmers need to carefully manage feed quantities, increase the use of probiotics, maintain proper water aeration and circulation, and regularly monitor environmental parameters. Experts advise against using strong chemicals to kill algae suddenly as this can easily cause shock and rapidly degrade the pond environment.



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TUNA NEWS

OVERVIEW

Vietnam's tuna exports in April 2026 reached 81 million USD, down 6% compared to the same period in 2025. In the first four months of the year, total export turnover amounted to 289 million USD, a decline of 4.8% year-on-year.

In terms of product structure, fresh, frozen, and dried tuna products under HS code 03 remained the main pillar, generating 169 million USD, accounting for 59% of total export value and posting a slight increase of 1% compared to the same period in 2025. Meanwhile, processed tuna products under HS code 16 reached 120 million USD, down 12%.

Despite the decline in the broader processed segment, canned tuna still recorded a 1% increase, indicating that convenient, easy-to-consume, and standardized products continue to perform better than many other processed product lines.





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TUNA NEWS

GERMANY MARKET



According to Vietnam Customs data, Vietnam's tuna exports to Germany exceeded 8 million USD in the first three months of 2026, up 8% compared to the same period last year. Germany remains one of the key markets for Vietnamese tuna within the EU. As Europe's largest economy, the country has a modern distribution system and relatively strong seafood demand. However, consumer conditions in Germany have become less favorable in recent years, as households are increasingly cautious with spending, particularly on non-essential food products.

On a positive note, Vietnam continues to benefit from the EU–Vietnam Free Trade Agreement (EVFTA), which provides an important foundation for Vietnamese seafood products, including tuna, to improve market access and ease tariff pressure on certain product lines.

In the coming months, Germany's tuna imports are expected to remain stable or post slight growth, especially in processed, semi-processed, and convenience products. Nevertheless, the potential for a strong breakthrough may remain limited, as German consumer demand has yet to show a clear and broad-based recovery.



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TUNA NEWS

IMPORT MARKETS FOR VIETNAMESE TUNA IN THE FIRST FOUR MONTHS OF 2026

THE USA

109 million USD, ↓10%



THE EU

~62 million USD, ↓14%



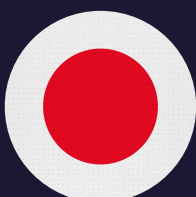
RUSSIA

19 million USD, ↑55%



JAPAN

13 million USD, ↑8%



ISRAEL

↑20%



THE PHILIPPINES

↑17%



EGYPT

↑69%



THE MIDDLE EAST

↑18%



CPTPP

↑10%





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CRAB & SWIMMING CRAB NEWS



OVERVIEW

In the first three months of 2026, Vietnam's exports of crab, swimming crab, and other crustaceans exceeded 93 million USD, up 23% compared to the same period last year.

According to VASEP data compiled from Vietnam Customs, crab exports reached nearly 77 million USD in the first quarter of 2026, up 22% compared to the same period in 2025. This product category accounted for the largest share of Vietnam's total crab and swimming crab exports. In February 2026 alone, crab exports surged by 83% to 29 million USD, helping lift the overall quarterly performance after a 9% decline in January.



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CRAB & SWIMMING CRAB NEWS

The main growth driver for crab exports continued to be China and Hong Kong. In the first quarter of 2026, exports to this market cluster reached 52 million USD, up 32% and accounting for nearly 68% of total crab export value. China alone imported 51 million USD worth of Vietnamese crab, an increase of 31%. This market benefits from strong demand, close geographical proximity, and suitability for Vietnam's live, fresh, and frozen crab products.

Swimming crab exports in the first quarter of 2026 reached 16.433 million USD, up 30.4% year-on-year. The United States remained the dominant market, with imports totaling 13.057 million USD, an increase of 37.5%, accounting for nearly 80% of Vietnam's total swimming crab export value.





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GOOD ITEMS FOR SALES

01



FROZEN BLACK POMFRET WHOLE ROUND

- Whole Round, Chemical-free
- Size 500/800
- Packing: IQF, 10kg/ctn
- 90% NW, 10% glaze

02



FROZEN PANGASIUS PATIN SLICE CUT

- Pangasius hypophthalmus
- STPP as EU standards, cut from well-trimmed, skin on fillet
- 60% Net Weight, 40% Glazing
- Packing: IQF, 1kg/ PE bag with rider X 10 / cartons
- Size: 20-30 grs/pc

03



FROZEN YELLOWFIN TUNA LOINS SASHIMI

- Scientific name: Thunnus Albacares
- Skinless, Boneless, No CO Treated, NATURAL
- 100% NW
- Size (kg/pc): 2-5 kgs
- Packing: IWP, 25kg/ carton



GOOD ITEMS FOR SALES

04



FROZEN COOKED VANNAMEI PDTO

- Litopenaeus vannamei
- Headless, Shell OFF, Tail ON, STPP Treatment
- 100% Net Weight
- Packing: IQF, 1kg/ PE bag with rider, 10kg/ carton
- Size: 31/40, 41/50, 51/60 pcs/lb

05



FROZEN RAW VANNAMEI PDTO

- Headless, Shell OFF, Pin/ Cut Deveined & Tail On, STPP Treatment
- 100% Net Weight
- Packing: IQF, 1kg/ PE bag with rider, 10kg/ carton
- Size: 31/40, 41/50, 51/60 pcs/lb

06



FROZEN BLACK SQUID WHOLE ROUND

- Size 10-15 cm
- 90% NW, 10% Glaze.
- Packing: Block, 10kg.



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