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2026

BREAKING NEWS

VIETNAMESE SEAFOOD



Source: VASEP

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PANGASIUS NEWS

OVERVIEW

Cumulatively from January 1 to October 15, 2026, Vietnam's pangasius exports reached 1.84 billion USD, recording a growth of 10.5% compared to the same period in 2025. This commodity currently contributes 18.9% to the country's total seafood export value.

The live, fresh, frozen, and dried pangasius group (under HS code 03) continues to account for an overwhelming share of up to 98.1% of total turnover, reaching 1.81 billion USD (up 11.1%). The primary contributor within this group is the frozen fillet product line (HS0304), bringing in 1.51 billion USD. In contrast to this upward trend, the value-added processed pangasius group (HS16) accounts for a very small share (1.9%), generating 35 million USD and showing a downward trend of 13.8% compared to the same period last year.



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PANGASIUS NEWS

CHINESE MARKET

As of October 15, 2026, pangasius exports to the China & Hong Kong bloc reached 510.69 million USD, an increase of 24.9% compared to the same period last year. Considering China alone in the first 9 months, this market reached 480 million USD (up 28%), accounting for 28% of the country's total pangasius export turnover. However, the growth rate in September (up 25%) was lower than the 9-month average, indicating that the pace is slowing down compared to the beginning of the year.



Growth is uneven and heavily concentrated on frozen fillets and fish meat (HS0304) with 341 million USD (up 45%), accounting for a 71% share. In contrast, the whole and chunk fish group decreased by 1%, narrowing to 137 million USD.

The processed goods group (HS16) increased almost tenfold in the first 9 months (reaching 1.8 million USD). Nevertheless, the scale of this group is very small (accounting for only 0.4%) and unstable (Q3 saw a sharp decrease of 43%). Therefore, in the short term, frozen fillets and fish meat will remain the primary leading commodities.

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PANGASIUS NEWS

US MARKET



The US is currently Vietnam's second-largest pangasius import market; however, it is recording a downward trend, contrasting with the 10.5% growth momentum of the overall pangasius industry.

Cumulatively from January 1 to October 15, 2026, pangasius export turnover to the US reached 236.18 million USD, a decrease of 12.4% compared to the same period in 2025. Despite the decline, this market still contributes 12.8% to the country's total pangasius export value.

Looking at developments in recent months, the downward trend shows no signs of stopping. In September 2026 alone, export turnover to the US reached 21.41 million USD, down 5.2% compared to September 2025.

In the first half of October 2026 (from October 1 to 15), export value to this market was recorded at 11.5 million USD.

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PANGASIUS NEWS

BRAZILIAN MARKET



In contrast to the decline in the US, Brazil is making a strong breakthrough and firmly consolidating its position as Vietnam's third-largest pangasius export market.

Cumulatively from the beginning of the year to October 15, 2026, export turnover to this South American country reached 157.79 million USD, growing by 19.4% compared to the same period last year and accounting for an 8.5% share of total pangasius exports.

In particular, purchasing demand in Brazil recorded a massive surge late in the third quarter. In September 2026 alone, export value to this market reached 19.94 million USD, soaring by 106.8% (more than doubling) compared to the same period in 2025.

This strong purchasing momentum was maintained into the beginning of the fourth quarter. In just the first half of October 2026, Brazil imported pangasius worth 13.62 million USD from Vietnam. Notably, Brazil's export turnover in the first half of October (13.62 million USD) even surpassed the import value of the US market during the same period (11.5 million USD).

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SHRIMP NEWS

OVERVIEW

According to data from the Department of Fisheries and the Fisheries Surveillance Department in Vietnam, domestic production of brackish-water shrimp has maintained a positive trend. In the first nine months of the year, output reached over 1.07 million metric tons—representing 76.6% of the annual target—comprising 791,400 tons of vannamei shrimp and 281,500 tons of black tiger shrimp. To meet the full-year goal of 1.4 million tons, approximately 327,200 additional tons must be produced in the fourth quarter.

As the fourth quarter begins, import demand in Asian markets—driven by year-end holidays and the Lunar New Year—is expected to continue supporting Vietnamese shrimp exports. China, Japan, Australia, and Canada are likely to remain key, active markets, while the outlook for the United States and the European Union continues to be influenced by factors such as purchasing power, existing inventory levels, and trade policies.





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SHRIMP NEWS

US MARKET

Exports to the US reached only USD 498 million, a decline of 15%; for the month of September alone, the figure dropped by 32%.

Shrimp exports to the US remain under pressure from trade policies—including anti-dumping and countervailing duties, as well as adjustments to import tariffs. These factors, combined with a lack of clear recovery in purchasing power and competition from major suppliers like Ecuador and India, are affecting the ability of Vietnamese shrimp to secure orders and maintain price competitiveness.

In particular, the final results of the 20th administrative review (POR20) of anti-dumping duties—expected to be announced in November 2026—remain a key point of concern for both businesses and importers. Uncertainties regarding import costs may lead buyers to exercise greater caution when signing contracts, negotiating prices, and planning procurement for the final months of the year and the beginning of 2027.

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SHRIMP NEWS

JAPANESE MARKET





According to Vietnam Customs data, shrimp exports to Japan in September 2026 reached USD 52.3 million, up 8.6% year-on-year. For the first nine months, the cumulative total reached USD 440.9 million—a 6.4% increase—accounting for 11.8% of Vietnam's total shrimp export turnover. Japan remains the third-largest market for Vietnamese shrimp, following China and the United States.

Meanwhile, data from the International Trade Centre (ITC) indicates that Japan's shrimp imports totaled approximately USD 1.25 billion during the first eight months of 2026, a 3% decrease compared to the same period last year. Of this, imports from Vietnam reached nearly USD 330 million—a figure comparable to the previous year—representing approximately 26.4% of Japan's total shrimp imports.

Vietnam remains Japan's largest shrimp supplier by value. Other key suppliers include Indonesia (USD 194.6 million, down 6%), India (USD 193.8 million, up 5%), Thailand (USD 153.1 million, down 25%), and Ecuador (USD 87.9 million, down 8%).



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SHRIMP NEWS

EU MARKET

Shrimp imports by the EU and the UK showed positive signs of recovery in August 2026, increasing by 11.3% compared to the same period last year. However, the cumulative import volume for the year to date remains lower than that of 2025.

According to data from Eurostat and Expana, the EU and the UK imported 66,513 tonnes of shrimp in August 2026—an increase of 2.9% from July and 11.3% from the same month last year. This volume also exceeds the five-year average (2021–2025) by 7.3%.

The figures indicate that shrimp imports into the EU and the UK have been improving since June, maintaining a positive trend in the months that followed. After reaching 50,057 tonnes in May, import volumes rose to 59,003 tonnes in June, 64,657 tonnes in July, and 66,513 tonnes in August.

Despite the recovery seen in recent months, the total import volume for the first eight months of 2026 remains below the level recorded during the same period last year. This suggests that the short-term improvement has not yet been sufficient to offset the decline experienced earlier in the year.

The statistics encompass both warm-water and cold-water frozen shrimp, covering both raw and processed product categories.

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SHRIMP NEWS

RAW MATERIAL SITUATION

Global shrimp prices showed mixed movements in Week 44 of 2026, with Vietnam experiencing slight fluctuations while Indonesia recorded stronger gains. Prices varied across major producing countries, reflecting different market trends by shrimp size and origin.



Vietnam's vannamei shrimp prices showed slight fluctuations. Prices for 30 pcs/kg shrimp increased by USD 0.01 to USD 4.99/kg, while 50 pcs/kg shrimp decreased by USD 0.06 to USD 3.95/kg. Meanwhile, 80 pcs/kg shrimp remained nearly stable at USD 3.52/kg, up USD 0.01.

In other markets, India recorded price increases for larger shrimp sizes, while Indonesia saw the strongest increase in the 80 pcs/kg category, rising by USD 0.18 to USD 3.47/kg. Ecuador maintained the lowest prices among the five countries, while Thailand recorded the highest prices across all three sizes.

Overall, shrimp prices showed mixed movements across major producing countries, with Vietnam experiencing only slight fluctuations.

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TUNA NEWS

OVERVIEW

Amid a decline in Germany's overall tuna imports, Vietnamese tuna has continued to record positive growth. In the first nine months of 2026, Vietnam's tuna exports to Germany reached nearly USD 19 million, up 10% compared with the same period in 2025. Notably, after declining in the second quarter, exports rebounded strongly in the third quarter.

According to Germany's import data, tuna imports from Vietnam reached nearly USD 24 million in the first eight months of 2026, up 22%, while Germany's total tuna imports fell by 6%. This indicates that Vietnam is gradually strengthening its position and benefiting from shifts in Germany's supply structure.





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TUNA NEWS

GERMAN MARKET

During the first nine months of 2026, Germany remained one of the bright spots for Vietnam's tuna exports to the EU, while also being Vietnam's second-largest tuna import market within the bloc, after the Netherlands.

Export performance throughout the year showed considerable fluctuations:

- Q1/2026: up 8%;
- Q2/2026: down 14%, to nearly USD 4 million;
- Q3/2026: rebounded strongly, reaching more than USD 6 million, up 36%.

In September 2026 alone, Vietnam's tuna exports to Germany exceeded USD 3 million, surging 167% year-on-year. This strong recovery in Q3 helped bring cumulative exports for the first nine months back onto a growth trajectory. The rebound also suggests that demand in the German market remains present, although orders may be distributed unevenly across different periods rather than following a consistently stable growth trend.

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TUNA NEWS

GERMAN MARKET

In the first eight months of 2026, Germany imported approximately USD 368 million worth of tuna, down 6% year-on-year. While imports from Ecuador, the Netherlands and the Philippines continued to grow, imports from Papua New Guinea fell sharply by 30%.

Notably, tuna imports from Vietnam reached nearly USD 24 million, up 22%, making Vietnam Germany's fifth-largest tuna supplier, accounting for around 6% of total import value. This indicates that Vietnamese tuna is gaining market share despite the overall contraction of the German market.



The trend is also evident in the canned tuna segment. Germany imported 3,818 tonnes of canned tuna from Vietnam, up 21%, while the country's total canned tuna imports declined by 12%. However, Vietnam's average import price fell by 10% to EUR 3,335 per tonne, indicating that competitive pricing is helping expand market share while also putting pressure on export efficiency.

In the long term, Vietnam needs to gradually shift from price-based competition towards higher-value products to maintain sustainable growth in the German market.

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TUNA NEWS

GERMAN MARKET

Beyond pricing, requirements related to traceability and sustainability are becoming increasingly important in Germany.

Germany is currently the world's largest market for tuna carrying the MSC label. During the 2025/2026 season, sales of MSC-labelled tuna in the country reached nearly 89,000 tonnes, up approximately 20%.

This trend is particularly important for Vietnamese companies seeking to access major retail systems such as Aldi, Rewe and EDEKA. Going forward, competitive pricing will no longer be the only advantage; product quality, legally sourced raw materials, traceability and sustainability certifications will increasingly determine the ability to maintain supply contracts.

In the coming months, growth will depend on additional orders from German importers and retail chains. In the long term, alongside its price advantage, Vietnamese companies need to develop more value-added products, ensure legally sourced raw materials and meet sustainability certification requirements to maintain competitiveness and expand market share.



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CLAM NEWS

OVERVIEW



Vietnam's clam exports continued to grow positively in the first nine months of 2026, reaching nearly USD 107 million, up 17% compared with the same period in 2025. Market drivers are shifting significantly, with the EU and the United States recording strong growth, while exports to China have declined sharply.

This trend indicates that Vietnamese clams are gradually shifting towards higher-value markets, while also facing increasing requirements for product quality, processing, traceability and sustainability.

EU MARKET

The EU remains the most important market for Vietnamese clams, with Spain, Italy and Portugal serving as the three main growth drivers.
In the first nine months of 2026:

- Spain: more than USD 28 million, up 44%;
- Italy: USD 24 million, up 20%;
- Portugal: nearly USD 16 million, up 33%.

Together, these three markets accounted for nearly 64% of Vietnam's total clam export value.

Spain is particularly noteworthy not only as a major consumer market but also as an important seafood processing and distribution hub in Europe. The growing consumer preference for processed, pre-packaged and convenient products is creating opportunities for Vietnamese steamed clams, frozen clams and other value-added products.

The EU is therefore not only Vietnam's largest market but also a market with significant potential to enhance the value of Vietnam's clam products.



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CLAM NEWS

US MARKET

The United States is becoming one of the fastest-growing markets for Vietnamese clams. In the first nine months of 2026, exports to the US reached nearly USD 17 million, up 49%, making it the third-largest import market for Vietnamese clams.

This strong growth indicates that the US is becoming an important driver helping offset declines in certain other markets.

If this growth momentum can be maintained and market requirements are effectively met, the US could continue to play an important role in Vietnam's market diversification strategy for the clam industry.

CHINESE MARKET

In contrast to the EU and the US, Vietnam's clam exports to China declined sharply. During the first nine months of 2026, export value reached only USD 8.9 million, down 52% year-on-year.

This represents a significant change compared with 2025, when China was among Vietnam's leading clam export markets.

The decline in China continues to put pressure on overall export growth and highlights the need to diversify markets and reduce dependence on highly volatile destinations.

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CLAM NEWS

OTHER MARKETS





Several smaller markets have also recorded positive growth:

- Australia: up 85%;
- Germany: up 64%;
- United Kingdom: up 52%;
- Singapore: up 47%;
- Canada: up 42%;
- Malaysia: up 335%, although export value remains relatively modest.

Although these are not yet Vietnam's key markets, the strong growth demonstrates considerable potential for further market expansion.

Amid intensifying international competition, Vietnam's advantages in the clam sector cannot rely solely on price. Standard-compliant raw material areas, stable supply capacity, traceability, convenient processed products and sustainability certifications will increasingly determine the ability to maintain market share.

By effectively capitalizing on the growing demand for convenient and sustainable products, while continuing to expand into new markets, Vietnam's clam industry could not only sustain export growth but also gradually enhance export value during the 2026–2027 period.

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GOOD ITEMS FOR SALES



FROZEN PANGASIUS HGT V-CUT
Head off, gutted, tail off, bone in, skin on, chemical-free
70%NW, 30% Glazing
Size (grs/pc): 1000 up
Packaging: IQF, Bulk, 10kg/ cnt



FROZEN BLACK POMFRET WHOLE ROUND
Grade AA, Whole round, chemical free
90% NW, 10% glazing
Size (grs/pc): 100/200; 200/300
Packing: IQF, Bulk bag 10kg/ ctn with sticker



FROZEN INDIAN MACKEREL WHOLE ROUND
Grade AA, Whole round, chemical free
90% NW, 10% glazing
Size (pcs/kg): 6/8; 8/10; 10/12
Packing: IQF, Bulk bag 10kg/ ctn

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GOOD ITEMS FOR SALES



FROZEN WHOLE COOKED WHITE CLAM

No chemical
90% Net weight, 10% Glazing
Size (pcs/kg): 60/90
Packing: 10 x 1kg Vacuum bag with rider/carton



FROZEN COOKED VANNAMEI SHRIMP PDTO

Cooked, headless, shell-less, peeled and deveined, tail-fan on, STPP treatment
80% NW, 20% Glazing, FC/FW
Size (pcs/lb): 16/20; 26/30; 31/40; 41/50; 51/60
Packing: IQF, 1kg plain bag with rider x 10/ctn



FROZEN SCALLOP MEAT

Roe off, 88% (+/-1) moisture content
70% NW, 30% Glazing
Size (pcs/lb): 10/20, 20/30, 30/40 (natural assortment)
Packing: 1kg plain bag with rider x 10kg/ctn



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THANK YOU

CONTACT US



+84 2 866 866 865
sales@huyhoangseafood.com.vn
www.huyhoangseafood.com.vn
Ho Chi Minh City, Vietnam