



HUY HOANG
GLOBAL FOOD

BREAKING NEWS

VIETNAMESE SEAFOOD



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PANGASIOUS NEWS



OVERVIEW

In the first eight months of 2025, Vietnam's pangasius (tra fish) exports reached USD 1.4 billion, up 10% year-on-year, reaffirming its position as one of the country's key seafood export sectors. Products under HS code 03 (fresh, frozen, or dried) contributed USD 1.383 billion, accounting for nearly 98% of total pangasius export value. Among them, frozen pangasius fillets (HS0304) remained the main export item, generating over USD 1.1 billion, an increase of 11% compared to the same period last year.



Notably, value-added processed products (HS16) reached USD 36 million, marking an impressive 32% growth year-on-year — a positive sign of product diversification and the industry's move toward higher value-added offerings.



PANGASIU NEWS



>>> Vietnam's pangasius exports in the first eight months of 2025 depict a picture of divergence: while China and Hong Kong have slowed down, the CPTPP bloc, ASEAN, and Brazil have emerged as new growth drivers, whereas the U.S. and the EU continue to serve as stable pillars.



CPTPP AND SOUTH AMERICA

The group of countries supported by the CPTPP Agreement led the growth rate of Vietnamese pangasius imports in the first eight months of this year, reaching USD 242 million, up 36% year-on-year — the highest growth among all market blocs.

The main reason lies in the near-zero tariff advantages under the CPTPP, giving Vietnamese pangasius a significant price edge compared to pollock and tilapia. At the same time, these countries require high standards of quality and clear traceability — factors that many Vietnamese enterprises have already met — thereby increasing the average export value per order.

As of the end of August 2025, pangasius exports to Brazil — considered the gateway to South America — reached USD 118 million, up 54% year-on-year, driven by the replacement demand for domestic tilapia and the growing familiarity of consumers with pangasius.



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EU MARKET

Vietnam's pangasius exports to the EU brought in USD 120 million in the first eight months, up 6%. Although the growth rate remains modest, the EU continues to be a high-value market with a significant impact on brand reputation.

Stable demand for high-standard pangasius fillets in Germany, the Netherlands, and Spain demonstrates the long-term potential for consolidation. However, to fully tap into the EU market, exporters must meet requirements for sustainability certification, traceability, and green consumption trends.

ASIAN MARKET

The ASEAN market is increasingly affirming its importance on the export map of Vietnamese pangasius. Over the first eight months, Thailand imported USD 52 million (up 31%), the Philippines reached USD 26 million (up 31%), while Malaysia and Singapore maintained stable growth momentum.

With geographical proximity, low logistics costs, and similar consumer preferences, ASEAN is becoming a "safety belt" that helps Vietnamese pangasius reduce dependence on distant and demanding markets.





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RAW MATERIAL



During September 26 – October 2, 2025, the price of white-meat pangasius in Dong Thap ranged from VND 29,000 – 31,000/kg for fish weighing 0.7 – 1.0 kg each. Prices have remained stable at a relatively high level, indicating favorable market conditions and recovering export demand.

Compared with mid-year levels (VND 26,000 – 28,000/kg), current prices have risen slightly by VND 1,000 – 3,000/kg, reflecting tighter supply caused by higher input costs and stricter control over farming areas in provinces such as An Giang and Dong Thap.

This price range ensures profitability for farmers and encourages production expansion; however, maintaining strict quality control and traceability remains essential to sustain stable export markets.



SHRIMP NEWS



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OVERVIEW

The global shrimp industry is entering 2025 with a lot of turmoil. Rising tariffs, rapidly changing demand and fierce competition have forced the largest exporting countries to adapt and pivot. India, Ecuador and Indonesia are typical examples of this shift.



THE US AND EU ARE TWO IMPORTANT "PLAYGROUNDS" FOR THE ENTIRE SHRIMP INDUSTRY.

In the first seven months of 2025, the US imported 486,069 tonnes of shrimp, worth \$4.05 billion, up 18% and 27%, respectively. India still led the way with 192,552 tonnes, followed by Ecuador with 131,240 tonnes and Indonesia with 83,663 tonnes.

In Europe, imports in the first seven months reached 249,302 tonnes, worth 1.59 billion euros, up 21% in volume and 27% in value. Ecuador remained the largest supplier with 139,078 tonnes, while India and Vietnam also recorded strong growth, reaching 31,077 tonnes and 29,787 tonnes, respectively.

SHRIMP NEWS

THE US MARKET



In the US market, exports in August reached 92.6 million USD, up 1.4% over the same period last year, bringing the total turnover in 8 months to nearly 500 million USD. This figure shows that the US is still an important market for Vietnamese shrimp, but developments in trade policy are posing significant challenges. Preliminary results of POR19 with anti-dumping tax much higher than before, along with anti-subsidy tax and reciprocal tax, can significantly affect competitive advantage.

Currently, the shrimp industry, associations and authorities are actively working to protect legitimate rights. While waiting for the final results, businesses need to be cautious in signing new contracts, and proactively expand alternative markets to reduce dependence pressure.



SHRIMP NEWS



Venezuela dropped out of the top 10 suppliers, with sales in August reaching only 24 tonnes (compared to 561 tonnes in the same period last year). Production problems have remained largely unresolved since the Venezuelan government took control of Grupo Lamar.



CHINESE MARKET

According to statistics from the General Administration of Customs of China, China's frozen warmwater shrimp exports in August 2025 reached 85,498 tons, up 5% year-on-year. Imports continued to grow year-on-year for many consecutive months, showing increasingly clear signs of market recovery.

In August, shrimp imports from Ecuador reached 65,633 tonnes, up 7% year-on-year. Ecuador's shrimp market share reached a record 77%.

In contrast, total shrimp imports from India were only 10,357 tonnes, down 20% year-on-year. Vannamee shrimp imports from Indonesia increased 263% year-on-year, although the import volume remains relatively small.

SHRIMP NEWS

EU MARKET

According to Vietnam Customs, in the first 8 months of the year, Vietnam's shrimp exports to the EU market reached 376 million USD, up 17% over the same period in 2024 and accounting for 12.6% of the country's total shrimp turnover. This growth momentum shows that the EU continues to be an important support for the Vietnamese shrimp industry in the context of fierce global competition. Among the main import markets, Germany leads with 96 million USD, up 23%. Belgium follows closely with 79 million USD, up 20%. The Netherlands reached \$74 million, up slightly by 3%, reflecting its role as a transit hub rather than domestic consumption. France continued to recover with \$23 million, up 14%, while Denmark emerged with \$25 million, up 9%. This divergence reflects a clear trend: Germany, Belgium, France and Denmark are pushing retail, while the Netherlands relies heavily on re-exports.

Forecast for the last months of the year

With a growth rate of 17% up to the end of August, combined with a positive demand picture, Vietnam's shrimp exports to the EU from now until the end of the year are expected to continue to maintain a growth rate of 12-15% compared to the same period last year. For the whole year, the export value could be 15-18% higher than in 2024. Germany, Belgium and France will continue to lead, while the Netherlands will maintain a stable role with few breakthroughs.

The main product groups are still peeled vannamei shrimp, convenient processed shrimp and certified sustainable black tiger shrimp. This is a product group that is both palatable to consumers and less exposed to direct competition from Ecuador and India.



SHRIMP NEWS

RAW MATERIAL SITUATION

TWO-PHASE SHRIMP FARMING MODEL IN QUANG TRI: EFFECTIVE AND SUSTAINABLE

Quang Tri Agricultural Extension Center has implemented a two-phase vannamei shrimp farming model in Vinh Thuy (Vinh Linh) and Trieu Binh (Trieu Phong) communes, initially achieving positive results, opening up a sustainable development direction for riverside farming areas. The model is implemented on an area of 0.5 hectares with a scale of 1 million shrimp, a density of 200 shrimp/m². The Center supports 50% of the cost of shrimp, feed and biological products, with a total cost of more than 370 million VND. The closed-loop farming system includes a storage pond, a settling pond, a nursery pond and a commercial farming pond, lined with canvas, covered with a roof and installed with a fan and oxygen system at the bottom to stabilize the environment.

After 4 months, the model showed clear results: Shrimp reached the size of 39-50 shrimp/kg, survival rate over 74%. Households in Vinh Thuy harvested 10.25 tons, profiting over 850 million VND; households in Trieu Binh harvested 7.4 tons, profiting over 500 million VND.





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TUNA NEWS

VIETNAMESE TUNA AND OPPORTUNITIES IN THE MIDDLE EAST - AFRICA MARKET



In the first 8 months of 2025, Vietnam's tuna exports to the Middle East reached nearly 60 million USD, down 23.4% compared to the same period in 2024. In general, tuna exports to the Middle East are clearly shifting: the main product is canned tuna, the consumption market is expanding beyond Israel to Egypt, the UAE and some emerging destinations. Meanwhile, although still modest, African countries are showing a strong trend of increasing imports of Vietnamese tuna with a turnover of 20.5 million USD, up 71% over the same period.

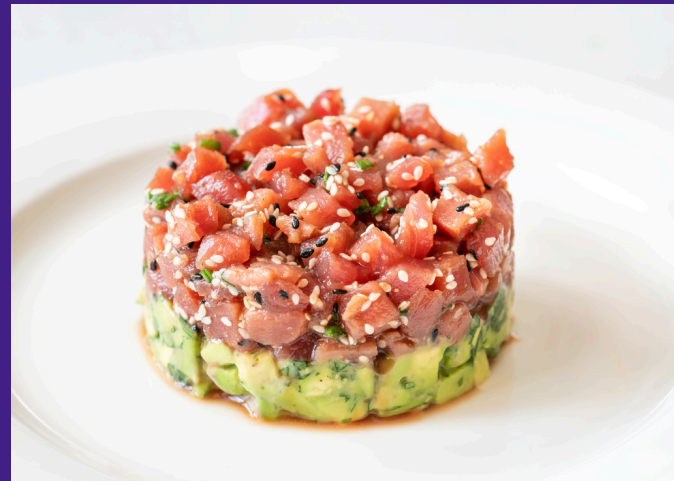
By market, Israel still leads with a turnover of 24.8 million USD (41.6% market share) but down 48.4%, due to the impact of geopolitical conflicts in the region. In contrast, Egypt rose strongly, reaching 14.7 million USD, more than doubling and accounting for nearly 25% market share, becoming a bright spot in the region. Some other markets recorded positive growth including UAE (+16.1%), Syria (+282.4%), Turkey (+49.2%), Oman (+266.2%) and Kuwait (+140.2%). Meanwhile, Saudi Arabia and Jordan saw sharp declines, -62.6% and -37% respectively.



TUNA NEWS



>>> In terms of export products to the Middle East, canned tuna continued to account for the largest proportion with more than 39.4 million USD, equivalent to 66.1% of total turnover, although it decreased slightly by 8.7% compared to the same period. In contrast, other product groups all decreased sharply: other processed tuna decreased by 65.7%, frozen tuna fillets (code 0304) decreased by 18.9%, and fresh/live/frozen/dried tuna other than 0304 decreased by 90.4%. This shows that the Middle East market is increasingly focusing on convenient and highly stable products such as canned food.



FORECAST

- In the next 5–10 years, the tuna market in the Middle East is expected to maintain steady growth, particularly in countries such as the UAE, Saudi Arabia, Oman, and Qatar, driven by rising living standards and increasing food imports.
- In Africa, although there are still challenges related to infrastructure and logistics, Vietnam and other exporting countries can focus on more stable markets such as South Africa, Kenya, Nigeria, and Ghana — where seaports are available, economies are more developed, and urbanization is accelerating.
- The trend toward “green,” sustainable, and traceable products (sustainable fishing) will become increasingly important; consumers and importing supermarkets will prioritize products with clear environmental labeling and sustainable sourcing.



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GOOD ITEMS FOR SALES



FROZEN PANGASIU FILLET WELL-TRIMMED

- Skinless, boneless, red meat Off, belly Off, fat Off, STPP as EU's Standards
- 80% Net Weight, 20% Glazing
- Size: 120grs - 170grs/pc
- Packing: 1kg packaging blanco + rider



FROZEN PANGASIU HGT

- Head OFF, Gutted, and Tail OFF, Chemical-free
- 80% Net Weight, 20% Glazing
- Size: 500-800, 800-1000, 1000+ (gr/pcs)
- Packing: IQF Bulk 10kgs/Ctn



FROZEN PANGASIU STEAK

- Steak cut, Bone in, Skin on, No Treatment
- 80% Net Weight, 20% Glazing
- Size: 60-120 (grs/pc)
- Packing: IQF, Vacuum bag with rider, 800 grs/bag x 12/ctn



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GOOD ITEMS FOR SALES



FROZEN RAW BLACK TIGER HOSO

- Head On, Shell On
- 70% Net Weight, 30% Glazing
- True Count, True Weight
- Size (pc/lb): 16/20, 21/25, 26/30
- Packing: 1QF, 1 kg/bag, 10 bags/carton



FROZEN COOKED VANNAMEI PDTO

- Cooked, Peel, cut-deveined, tail on, non-STPP treatment
- 80% net weight, 20% glazing
- Frozen weight/frozen count
- Packing: IQF, 1kg gross, 800gr Net/plain bag with rider, 10bags/carton
- Size (pcs/lb): 16/20, 26/30, 31/40



FROZEN RAW VANNAMEI PD

- Raw, Headless, Shell-less, Pin Deveined, Tail Off, STPP treatments as EU's standard
- 75% NW, 25% Glazing
- Frozen Weight, Frozen Count
- Size: 16/20 (pcs/lb)
- Packing: IQF, 1kgs/ bag with rider x 10/master carton



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Thank You

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