

2026



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BREAKING NEWS

**VIETNAMESE
SEAFOOD**



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VASEP



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PANGASIOUS NEWS

OVERVIEW

Despite global trade fluctuations and tariff pressures, Vietnam's pangasius exports reached over USD 1.7 billion in the first 9 months of 2026. The industry is finding strong growth momentum in the UK, Japan, the EU, and the Middle East amidst tight global whitefish supplies.

Total exports reached USD 1.733 billion (up 10.5% year-on-year), with September alone contributing nearly USD 210 million. Frozen fillets remained the core product, generating USD 1.424 billion (up 13.1%). Other frozen or dried products saw a slight increase, while value-added processed products dropped by 13% to just USD 33.2 million.

China, the US, and Brazil remained the top consumers, accounting for 49% of total exports. However, performance diverged: exports to China (up 28.4%) and Brazil (up 14.8%) grew strongly, while the US market fell by 12.8% due to higher POR21 anti-dumping tax rates. This decline in the US highlights the urgent need for market diversification in the coming months.



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PANGASIU NEWS

UK MARKET

The UK market is becoming a "bright star" within the CPTPP bloc for Vietnam's pangasius industry. Accumulated over the first 9 months, exports to this country reached nearly USD 57 million, an increase of 27.6%. The most notable highlight was that the September turnover recorded an explosive growth of up to 95% compared to the same period last year, reaching USD 7.07 million. Vietnamese pangasius is making excellent use of the preferences from the UKVFTA, while successfully capturing consumer trends in the UK as people increasingly favor foods rich in natural protein (accounting for 76% of interested consumers), rich in micronutrients, and beneficial to health at reasonable costs. However, from November 26, 2026, the UK will apply new regulations on IUU fishing documentation, requiring businesses to prepare carefully regarding traceability.



PANGASIOUS NEWS

EU MARKET

In the European Union (EU), Vietnamese pangasius also recorded a very positive double-digit recovery momentum. The 9-month turnover reached USD 148 million, up 11.9%. Although the Netherlands – the bloc's largest import gateway – experienced a decline of 10.9% in September, this was offset by very positive growth in other member markets (as of September 15, Germany was up 33.6%, Spain up 17.6%, Poland up 42.6%, and Lithuania up 27.9%). The fact that EU countries are aggressively seeking alternative whitefish sources (due to the scarcity of cod and bans on Russian seafood) is opening up huge consumption room for pangasius. Nevertheless, the EU continues to maintain and tighten strict standards on hygiene and safety, environmental sustainability (ASC), and supply chain control, requiring Vietnamese businesses not to neglect quality.





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PANGASIOUS NEWS

THE MIDDLE EAST MARKET

The Middle East region is showing clear recovery with a 9-month turnover of USD 131.09 million, up 7%. Among these, Saudi Arabia played the role of the "locomotive" leading the whole bloc, importing USD 43.48 million, a sharp surge of 57.5% year-on-year. Additionally, Jordan and Kuwait also recorded positive growth rates. Even so, the growth momentum of the entire region remains uneven, as markets like the UAE, Iraq, and Iran experienced declines. The biggest barrier currently is geopolitical instability in the Red Sea region, the Strait of Hormuz, and the Persian Gulf, escalating ocean freight costs, prolonging delivery times, and directly impacting enterprises' profit margins.



JAPANESE MARKET

Japan – a market renowned for strict quality and product specification requirements – maintained surprising stability, rising to enter the top 10 largest markets. In the first 9 months of the year, pangasius exports to Japan reached USD 40.87 million, up 20.1%. September alone reached USD 4.56 million, up 14.7%. Maintaining continuous double-digit growth here affirms the prestige, quality, and deep processing capabilities of Vietnamese pangasius, which are increasingly meeting the highest standards of international distribution systems.

PANGASIOUS NEWS

RAW MATERIAL SITUATION

Environmental changes, heavy rainfall, and poor water quality can increase the risk of major diseases in pangasius farming, leading to significant economic losses.

Bacillary necrosis, caused by *Edwardsiella ictaluri*, is common during the first three months of stocking, especially in the rainy season. Losses can reach 10–50%. Symptoms include lethargy, reduced appetite, pale skin, and white spots on the liver, kidneys, and spleen.

Hemorrhagic disease, caused by *Aeromonas hydrophila*, often develops when fish are stressed or water quality deteriorates. Signs include bleeding on the body and fins, bulging eyes, skin ulcers, abdominal swelling, and reduced feeding. Severe outbreaks can cause mass mortality.

To prevent disease, farmers should stock healthy fingerlings from reliable sources, maintain suitable stocking densities, monitor water quality, manage feeding, and regularly disinfect ponds and equipment. Strong biosecurity practices help limit disease transmission.

When unusual fish mortality occurs, farmers should notify relevant authorities, collect samples for laboratory testing, and follow professional guidance. Avoid inappropriate medication and never release untreated water from infected ponds into the environment.

SHRIMP NEWS

OVERVIEW



Vietnam's shrimp exports reached USD 3.7 billion in the first nine months of 2026, an 11% increase compared to the same period last year. While growth has been sustained by demand from China and several CPTPP member countries, the momentum is slowing as exports to the U.S. and the EU decline. Tariff pressures, international competition, and challenges regarding raw material supplies are creating significant hurdles for businesses in the final months of the year.



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SHRIMP NEWS

US MARKET

U.S. shrimp imports surged in August 2026, reaching 79,729 metric tons—a 32% increase compared to the same period last year and the highest level since 2021. The value of these imports hit USD 676 million, up 29%, according to shrimp trade data published in Shrimp Bytes.

In the first eight months of 2026, the U.S. imported 539,821 tons of shrimp, a 1% decrease compared to the same period in 2025. However, the upward trend seen in recent months suggests that demand is recovering. The total import value reached USD 4.681 billion, remaining nearly on par with the same period last year.

By product category, frozen peeled shrimp continued to account for the largest share, reaching 288,473 tonnes over the eight-month period—an increase of 1%. Breaded shrimp showed the strongest growth, reaching 44,712 tonnes (up 13%), while cooked shrimp and seasoned shrimp declined by 16% to 68,111 tonnes.





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SHRIMP NEWS

EU MARKET

The EU remains a key market for Vietnamese shrimp; however, purchasing power and import structures are undergoing notable shifts. According to Vietnam Customs data, as of September 15, 2026, Vietnamese shrimp exports to the EU reached nearly USD 374 million—a 5% decline compared to the same period—accounting for 10.7% of the country's total shrimp export value. Meanwhile, the EU's shrimp imports fell by 7% in volume through July 2026, with varying trends observed across Southern Europe, Northwestern Europe, and Eastern Europe. These developments necessitate that Vietnamese enterprises closely monitor the specific demands of individual markets, rather than viewing the EU as a monolithic consumer market.

The decline in value is more pronounced than the decline in volume, suggesting that average import values and product composition are under pressure. Monthly trends also remain unstable: in May alone, import volume fell by 27% year-on-year, while by July, total volume was still down by 8%. This indicates that importers are adopting a more cautious approach following a year of strong growth in 2025, with purchasing power and inventory levels likely varying across member markets.



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SHRIMP NEWS

CHINESE MARKET

China's shrimp imports continued to surge in 2026, with Vietnamese shrimp exports to this market also recording notable growth. However, behind these positive figures lie two distinct realities: consumption within China is growing at a slower pace than imports, and the composition of Vietnamese shrimp exports to this market includes a very large proportion of lobsters—a significant departure from the product mix seen in exports from Ecuador and India. This necessitates that businesses carefully examine each specific segment to accurately assess both opportunities and risks.

In the first eight months of 2026, China imported approximately 710,000 tonnes of shrimp, an increase of 17% compared to the same period last year; the import value reached about USD 3.56 billion, up 12%. In August alone, imports totaled nearly 91,800 tonnes, an increase of 7%.

Prior to this, China's shrimp imports had surged throughout the first two quarters of the year. In July, the growth rate slowed more noticeably, with imports reaching 92.4 thousand tonnes—an increase of only 2% compared to the same period last year—while the total value actually fell by 4%. Over the first seven months of the year, China imported 618.3 thousand tonnes, an increase of 19%, whereas the total value rose by only 14%, reflecting downward pressure on the average import price.





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SHRIMP NEWS

RAW MATERIAL SITUATION



The hepatopancreas and intestine are essential for shrimp digestion, nutrient absorption, and health. Misdiagnosis of diseases affecting these organs can lead to ineffective treatment and increased farming costs.

Hepatopancreatic damage may result from poor-quality postlarvae, polluted water, unstable pH, toxic gases, or pathogens such as *Vibrio parahaemolyticus*. Symptoms include discoloration, swelling, shrinkage, or hardening. Intestinal disorders often cause faint or empty guts, broken fecal strings, and white spots on abdominal segments, while the hepatopancreas may remain normal.

When both organs are affected, hepatopancreatic recovery should be prioritized to restore digestive function and limit further intestinal damage. After treatment, farmers should gradually increase feeding, maintain water quality, siphon pond bottoms, and use vitamins, organic acids, or probiotics to support recovery and prevent recurrence.

TUNA NEWS

OVERVIEW

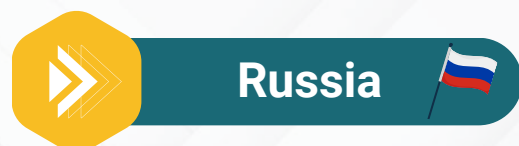
Vietnam's tuna exports have shown a clear recovery since June 2026 following a period of decline in the early months of the year. In September, export value reached nearly USD 86 million, up 18% year-on-year, marking the fourth consecutive month of growth. In the first nine months of 2026, total export value reached nearly USD 720 million, up 6% compared with the same period in 2025.

However, the recovery remains fragile due to diverging market performance, pressure from tariff policies, traceability requirements, and competition from other supplying countries. The outlook for Q4 2026 will depend significantly on demand trends and import policies in the US and EU, as well as Vietnamese exporters' ability to expand into other markets.

VIETNAM'S MAJOR TUNA EXPORT MARKETS (JANUARY 1 – SEPTEMBER 30, 2026)



USD 280 Million
up 9.4% YoY



USD 43 Million
up 52.3% YoY



USD 39 Million
up 6.1% YoY



USD 43 Million
up 52.3% YoY

TUNA NEWS

US MARKET

In the first eight months of 2026, Vietnam's tuna exports to the US reached approximately USD 248 million, up 8% year-on-year. The US remained Vietnam's largest tuna export market.

Positive growth indicates that the US market continues to contribute to the industry's overall export performance. However, import tariff policies and requirements related to catch origin continue to create uncertainty for exporters. Although demand for canned tuna has shown signs of improvement, this does not necessarily mean that orders from Vietnam will increase accordingly.

EU MARKET

Vietnam's tuna exports to the EU declined by 17% in the first eight months of 2026. This was one of the most notable developments in the market landscape, indicating that exports to traditional markets have not recovered evenly.

In addition to challenges related to purchasing demand and competition, exporters must adapt to the electronic catch certification system, CATCH, implemented in 2026, which places greater emphasis on data management and traceability. In the medium term, ongoing trade negotiations between the EU and Indonesia and the Philippines could alter the relative tariff advantages among supplying countries.





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TUNA NEWS

OTHER MARKETS

- **Russia:** Exports increased by nearly 56%, making Russia one of the fastest-growing markets and creating additional opportunities to diversify export destinations.
- **Canada and Japan:** Exports maintained growth of approximately 7% and 4%, respectively, supporting overall export performance.
- **Thailand:** Exports declined by nearly 30%, highlighting the divergence in performance across markets.



If the monthly export value remains at an average of USD 85–90 million, Vietnam's total tuna export value for 2026 could reach approximately USD 975–990 million. However, this is a conditional scenario that depends on order volumes, costs, and policy developments in the final months of the year.

Exporters should continue diversifying their markets, developing processed products tailored to the needs of different regions, strengthening controls over legal raw material sourcing, and complying with traceability and rules-of-origin requirements.



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CRAB NEWS

OVERVIEW

Vietnam's crab exports continued to grow strongly in the first eight months of 2026, reaching USD 231 million, up 27% compared with the same period in 2025. In August alone, export value reached USD 41 million, up 53% year-on-year and the highest monthly level since the beginning of the year.

China remained the leading market, accounting for nearly 63% of total export value, while the US recorded outstanding growth of 250%. In contrast, exports to Japan declined by 15%. Despite the positive growth outlook, high market concentration, competition from other suppliers, and increasingly stringent food safety, quarantine, and traceability requirements remain key challenges for Vietnam's crab industry.





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CRAB NEWS

CHINESE MARKET

Vietnam's crab exports to China reached approximately USD 146 million, up 37%, accounting for nearly 63% of total export value. Including Hong Kong, the combined share of these markets reached approximately 64%.

China is both the largest export market and a major driver of the industry's overall growth. However, this high concentration also makes exports more vulnerable to changes in demand or import policies in the market.

JAPANESE MARKET

Exports to Japan reached approximately USD 53 million, down 15%, accounting for nearly 23% of total export value.

Although Japan remained the second-largest market, the decline indicates that export growth has been uneven across destinations. The downturn in Japan may have partly constrained overall export performance, although the exact impact would need to be assessed based on changes in absolute export value.

US MARKET

Vietnam's crab exports to the US reached approximately USD 24 million, up 250%, accounting for around 10% of total export value and making the US the third-largest market.

The sharp growth rate indicates opportunities to expand exports in the US market. However, a high percentage increase does not mean that the market's absolute size is comparable to those of China or Japan. Exporters should monitor the sustainability of orders and their ability to meet import requirements to assess whether this growth can be maintained.





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CRAB NEWS

OTHER MARKETS

- **Singapore:** Exports increased by 89%, indicating positive export performance, although further data is needed to assess its contribution to overall growth.
- **Taiwan:** Exports rose by 62%, creating opportunities to expand into Asian markets.
- **Canada:** Exports increased by 57%, indicating additional opportunities beyond the major markets.
- **Hong Kong:** Exports grew by 72%, further reinforcing the importance of mainland China and Hong Kong in Vietnam's crab export structure.

Although these markets recorded strong growth rates, their export volumes remain relatively small. Therefore, they can help diversify export destinations but are unlikely to immediately replace the role of the major markets.

Vietnam's crab exports are expected to maintain growth, particularly if demand in Asian markets strengthens during the peak season. China is likely to remain the key market, while the US warrants close attention due to its outstanding growth rate.

However, the decline in Japan highlights the continued risk of diverging market performance. Exporters should diversify their destinations, develop higher-value processed products, and strengthen quality control and traceability capabilities to maintain competitiveness.



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GOOD ITEMS FOR SALES



FROZEN PANGASIOUS FILLET WELL-TRIMMED

Skinless, boneless, red meat off, belly off,
fat off, STPP treatment
80% Net Weight, 20% Glazing
Size (grs/pc): 300 up
Packing: IQF, bulk 6kg/ Carton



FROZEN BARRAMUNDI WHOLE ROUND

Whole Round, Chemical-free
80% Net Weight, 20% Glazing
Size (grs/pc): 400/600; 600/800
Packing: IWP, 10kg/ carton



FROZEN RED MULLET FILLET

Skin on, Boneless, Scale off, Chemical-free
100% Net Weight
Size (grs/pc): 15/40, 40/80, 80/120
Packing: 10 x 800grs bag/carton



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GOOD ITEMS FOR SALES



FROZEN FROG LEGS

No blood, saddle bone on, skinless, Belly off, chemical-free, CLASSIC STYLE
100% net weight
Size (pcs/kg): 6/8; 8/12
Packing: 10 x 800gr bag with rider/carton



FROZEN CUT BABY OCTOPUS - 1 SKIN

No Chemical
100% Net Weight
Size (grs/pc): M, L, 2L
Packing: Block, 1kg/block



FROZEN RAW BLACK TIGER PD

Raw, Headless, Shell-less, Peeled, Deveined, Tail Off, STPP treatment
80% Net weight, 20% Glazing, FC/FW
Size (pcs/lb): 16/20; 21/25; 26/30; 31/40
Packing: IQF, Plain bag with rider, 1kg/bag x 10/ctn



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THANK YOU!



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