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# BREAKING NEWS

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# PANGASIOUS NEWS

## OVER VIEW

In the first eight months of 2025, Vietnam's pangasius exports reached **USD 1.4 billion, up 10%** compared to the same period in 2024, reaffirming its role as one of the country's key seafood sectors. Products under **HS03** (fresh/frozen/dried) contributed **USD 1.383 billion**, accounting for nearly 98% of total export value.



Within this group, frozen pangasius fillets (HS0304) remained the core driver, generating over **USD 1.1 billion**, an 11% year-on-year increase. Notably, value-added products under **HS16** posted **USD 36 million, rising an impressive 32%**—a positive signal for diversification and higher-margin product development.





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# PANGASIOUS NEWS



## ➔ China & Hong Kong market

Exports to China and Hong Kong fell **4%** year-on-year, **totaling USD 357 million** (25% share of total pangasius exports). In August alone, exports to this market also **declined 4%**, reaching **USD 55 million**.

## ➔ US market

Shipments to the U.S. reached **USD 234 million, up 3.7%** year-on-year, reflecting steady growth. Despite modest expansion, the U.S. remains one of the most strategic markets due to its high value, stringent requirements, and global influence.

## ➔ CPTPP market

The CPTPP bloc recorded the fastest growth in Vietnamese pangasius imports during the first eight months of this year, reaching **USD 242 million—up 36%** compared to the same period last year, the highest among all market groups. The key driver is **the near-zero tariff** advantage under CPTPP, which gives Vietnamese pangasius a significant price edge over pollock and tilapia.





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# PANGASIOUS NEWS



## → South America market

Beyond the CPTPP, South America is also emerging as a promising destination for Vietnamese pangasius exports. By the end of August 2025, exports to Brazil—considered the gateway to the South American market—reached **USD 118 million, up 54%** year-on-year. This growth is driven by rising demand as a substitute for domestic tilapia and increasing consumer familiarity with pangasius.

Together, the CPTPP and South America not only offset declines from China but also create opportunities for higher profitability through premium orders, better payment terms, and stronger margins. This is why both **CPTPP and South America** are becoming the new **“twin engines of growth”** for Vietnamese pangasius.

## → ASEAN market

The ASEAN market also showed strong momentum: **Thailand** imported **USD 52 million (+31%)** while the **Philippines** recorded **USD 26 million (+31%)**.

If Vietnamese exporters consolidate their positions across CPTPP, South America, and traditional markets (U.S., EU, ASEAN), the pangasius sector could establish a more balanced, multi-pillar market structure, reducing dependency on any single market and enhancing resilience against global trade volatility.



# PANGASIOUS NEWS

## VIETNAMESE PANGASIOUS FOR JAPANESE SUSHI - A BREAKTHROUGH

Vietnamese pangasius has been introduced to the menu at Kura Sushi, a well-known sushi chain in Japan. This marks an important step in strengthening the position of Vietnam's seafood in one of the world's most demanding markets.



Japanese consumers praised pangasius for its smooth white flesh and mild flavor, pairing well with wasabi and soy sauce while offering a refreshing alternative to traditional sushi fish. The product fully meets Japan's strict food safety, farming, and processing standards. Its appearance in Kura Sushi's menu is expected to lift export value and expand market reach beyond traditional destinations such as the U.S. and Europe.







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# PANGASIOUS NEWS

## RAW MATERIAL SITUATION

According to the General Statistics Office, pangasius output in August 2025 was estimated at 168,900 tons, up 3.5% year-on-year. In the Mekong Delta, farm-gate prices for raw pangasius (0.7–1 kg/pc) ranged from **VND 28,000–29,000/kg**, about **VND 2,000–3,000 higher than the** same period last year.



Looking ahead, prices are expected to continue climbing through the year-end. Export prices are projected to inch up from September due to tighter raw material supply and lower survival rates of juvenile fish, while many farmers are holding back harvests to wait for better prices.

Unfavorable weather conditions—heavy rains and temperature fluctuations—have pushed up farming costs, reinforcing the upward trend. Limited availability of fingerlings is also pressuring supply. Farmers are reluctant to sell smaller fish, preferring to raise them to larger sizes, which has prolonged raw material shortages through August. With current prices already higher than in the past three years, once processors deplete their frozen inventories, farm-gate purchase prices are expected to rise further.



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# SHRIMP NEWS

## OVERVIEW

In August 2025, Vietnam's shrimp exports reached 479 million USD, up nearly 19% over the same period in 2024. In the first 8 months, the turnover reached 2.97 billion USD, up 23%, recording a stable growth momentum since the beginning of the year. In the product structure, vannamei shrimp still plays a key role with more than 64% market share; black tiger shrimp has a slight increase, while other shrimp groups stand out with a triple-digit growth rate thanks to strong demand for lobster.



### → EU market

Continued to maintain positive growth momentum, reaching 66.9 million USD in August, up 19% over the same period; accumulated 8 months reached nearly 376 million USD, up more than 17%.

### → CPTPP block

Positive results were recorded when August turnover reached over 130 million USD, up 40%. In the first 8 months of the year, exports to this bloc reached 829 million USD, up 36%.

### → US market

August exports reached 92.6 million USD, up 1.4% over the same period last year, bringing the total 8-month turnover to nearly 500 million USD.

### → China and Hong Kong market

Continuing to be a bright spot with a growth rate of 62% in August, bringing the 8-month value to 836 million USD, up 75% and accounting for nearly 30% of the country's total turnover.



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# THE EU MARKET

The EU market continues to maintain positive growth momentum, reaching **USD 66.9 million in August**, up 19% year-on-year; cumulative exports over the first eight months reached nearly **USD 376 million**, an increase of more than 17%. **Germany, Belgium, and France** remain the key driving markets, while the **Netherlands** mainly serves as a transit hub. With full-year demand projected to hit a record high, the EU remains a significant potential market for Vietnamese shrimp, particularly for **value-added products with sustainability certifications, transparency, and traceability**.

Although Spain remains the largest shrimp importer in Europe by volume, France is narrowing the gap this year.

According to the latest forecast by expert Willem van der Pijl, France's shrimp imports are expected to reach around **111,000 tons by the end of the year**, a **26% increase** compared to the same period last year, when imports stood at 88,000 tons.

Alex Bongiorno, Director of Eurotrade Fish in Marseille, commented: **"2025 is a successful year for France. Imports are rising, the Euro/USD exchange rate is fluctuating, and shrimp prices are at record lows - this is a good time to buy."**







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# CHINA MARKET

According to **Song Changgui**, General Manager of Guangdong Rainbow Aquatic Development, a major shrimp importer and processor, Chinese consumer purchasing power is gradually recovering, which will drive growth in shrimp imports.



Mr. Song predicts that **Ecuadorian shrimp**, China's largest supply source, will be redirected to the U.S. and European markets, while **Indian shrimp** will have the opportunity to increase sales in China.

Although in the first seven months of 2025 China imported **519,437 tons** of shrimp, down 2% year-on-year, the import value grew strongly, reaching **USD 2.73 billion**, up 7%. The average shrimp price also rose by 9% to **USD 5.25/kg**. Notably, for three consecutive months from May to July, China's shrimp import value rebounded, recording year-on-year growth and marking a recovery after a period of decline.



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# THE US MARKET

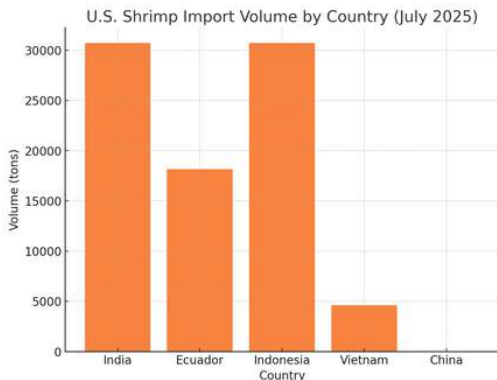
## ➔ The US Shrimp Imports - July 2025

The US imported **72,352 tons** of shrimp worth **USD 595.5 million**, up 18% in volume and 24% in value compared to the same period in 2024. This marked **the ninth consecutive month of growth**. The average price was USD 3.93 per pound, 6% higher year-on-year but 1.5% lower than in June.

## ➔ Tariffs Impact

Since **April 2025**, the Trump administration has imposed a **10% tariff on shrimp**. In **July** alone, US importers paid **USD 57.4 million in tariffs** (10% of import value). Over the first four months of the tariff implementation, total tariff payments reached **USD 151.2 million on imports worth USD 2.3 billion**.

## ➔ The US Shrimp Import Volume



## ➔ The US Shrimp Import Value



# SHRIMP NEWS

## RAW MATERIAL SITUATION

In recent times, the agricultural and environmental sectors of **Quang Tri province** and other localities have actively supported the implementation and replication of **shrimp farming models applying high technology and biotechnology**. Initial results have shown clear effectiveness: increased productivity and quality, reduced risks, and brought about outstanding economic benefits.

Quang Tri currently has about **9,350 hectares** of aquaculture area, with an annual output of about **22,150 tons**. With its coastal advantages, aquaculture is the livelihood of tens of thousands of households. The province is orienting the development of concentrated farming areas in the direction of stabilizing the area and applying science and technology to increase productivity per unit area.



Some high-tech models have been widely applied such as: **shrimp farming according to the 2-3 stage process, biofloc technology, farming in greenhouses, net houses with a closed-loop process**. According to the people, the high-tech shrimp farming model is much more economically efficient than the traditional method. Particularly, the vannamei shrimp farming model according to the 2-3 stage process can achieve a yield of **25-30 tons/ha, 4-5 times higher** than the average level of the province.





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# TUNA NEWS



## OVERVIEW

By the end of August 2025, Vietnam's tuna exports reached only 633 million USD, down 2% compared to the same period in 2024. Tuna exports to the largest market, the US, are down 4% over the same period.

## TOP 4 IMPORT MARKETS OF VIETNAMESE TUNA



### THE EU

144 million USD, ↑ 3%



### JAPAN

26 million USD, ↑ 22%

### THE USA

234 million USD, ↓ 4%



### CANADA

28 million USD, ↑ 20%







# TUNA NEWS

## ➔ The USA market

Tuna exports to the US still account for the largest proportion. Although exports to this market in August still decreased, the rate of decline has slowed down, reaching 29 million USD, down nearly 21% compared to the same period last year. The Vietnamese tuna industry is under great pressure due to the new tax policy, causing orders from businesses to stagnate. Compared to competitors such as Ecuador (tax only 15%) or Indonesia and the Philippines (19%), Vietnamese tuna is gradually losing its advantage with a corresponding tax rate of 20%.

## ➔ The EU market

The EU maintained its second position after the US. Tuna exports to the market continued to maintain growth momentum in August with an increase of 6% over the same period last year, reaching 17 million USD, up 6%. Among EU countries, **the Netherlands** and **Italy** stood out with growth rates of 40% and 43% respectively. Exports to **Germany** this month are also increasing compared to the same period last year with an increase of 26%.

# TUNA NEWS

## ➔ CPTPP market

Exports to major markets in the bloc are improving. Tuna exports to **Japan** unexpectedly increased in August by 88%. At the same time, exports to **Canada** also maintained good growth momentum. On the contrary, exports to **Mexico**, although still increasing, are slowing down.

## ➔ Other markets

In addition to traditional markets, some emerging markets also have positive signals such as **Russia** (+17.8%), **the Philippines** (+72.4%) and especially **Thailand** (+248%), making this country a notable destination.

In contrast, exports to **Israel** decreased by 13.2%, reflecting fluctuations in import demand in this market. Geopolitical instability in the Middle East market is strongly affecting tuna exports to this market.





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# SURIMI NEWS



## → The USA market

The US market showed a gloomy performance with only a slight increase of 2% after 8 months, with turnover reaching only nearly 7 million USD, reflecting difficulties from tax policies and the caution of importers.

## → The ASIAN market

By the end of August 2025, **South Korea** and **Thailand** were the two largest single markets, with turnover reaching 56 million USD and 53 million USD respectively. These markets not only consumed directly but also acted as reprocessing centers to supply neighboring areas, ensuring stable demand.

**The CPTPP** market also recorded an impressive growth of 24%, reaching a turnover of 37 million USD. Exports to the main import markets in the block are growing well. Of which, **Japan** is still one of the leading importers with nearly 21 million USD, up 22% over the same period.

## → The EU market

Exports to the EU have boomed, growing by 60% to nearly \$20 million. Leading the growth is **Lithuania**, with imports soaring by 69%.

## → China and Hong Kong market

The Chinese and Hong Kong markets also proved to be extremely attractive with a growth rate of 50%, reaching a value of 31 million USD. The increasing demand for consumption and recycling in this billion-people market is opening up great opportunities for Vietnamese exporters.

# 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 FILLET UNTRIMMED

- Skinless, boneless, belly on, fat on, red meat on, treated Eu standard
- 95% Net Weight, 5% Glazing
- Size: 220+
- Packing: IQF, 10kg/ctn



## FROZEN PANGASIU CUBE UNTRIMMED

- Skinless, boneless, red meat on, fat on, belly on, STPP as EU's standards
- 80% Net Weight, 20% Glazing
- Size: 20-40 pc/kg
- Packing: IQF, plain bag with rider, 1 kg/bag x 10 /flexo carton



# GOOD ITEMS FOR SALES



## FROZEN COOKED VANNAMEI PDTO

- Pin-Deveined, Tail ON, STPP as EU's Standard
- 70% Net Weight, 30% Glazing
- True Count, True Weight
- Size (pc/lb): 16/20, 21/25, 26/30
- Packing: 1QF, 1 kg/bag, 10 bag/carton



## 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



## FOZEN COOKED VANNAMEI SUSHI EBI

- Untreated, Only soaking with salt
- 100% NW
- Raw material size: 3L
- Packing: 30pcs/ 180g net weight/ vacuum tray, 20 trays/carton



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# Thank You

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