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# **BREAKING NEWS SEAFOOD**

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**2025**

# PANGASIOUS NEWS

According to Vietnam Customs, in the first half of June 2025, Vietnam's pangasius exports reached **86 million USD**, marking a 6% increase compared to the same period last year. As of June 15, 2025, accumulated export turnover totaled **915 million USD**, up 11% over the same period in 2024.

The **frozen fillet** product group HS0304 continues to play a key role, accounting for **over 80%** of the total export value, with a growth rate of **10%**.

A noteworthy highlight lies in the **value-added processed products** under the HS code 16. By mid-June, exports of this group had reached **24 million USD**, up **59%** year-on-year, despite representing only 2.6% of total pangasius export value.

## OVERVIEW







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## **HOT INDUSTRY UPDATE: DEEP-PROCESSED SEAFOOD ON THE RISE! 🔥**

Global demand for **highly processed seafood** products is surging rapidly — and this isn't just a trend, it's a major industry shift!

Not only the U.S., but also Europe, Canada, Japan, Mexico, and other key markets are showing a **strong preference for ready-to-use, value-added seafood products**.

Consumers no longer want just a fillet. They're looking for:

- Pre-cooked seafood
- Clean, attractive packaging with sauces included
- Portion-controlled servings, designed for modern retail channels and restaurants

In short, it's no longer about "raw seafood" — but fully prepared seafood meals, ready to heat and serve!

Businesses are already expanding their product portfolios and investing in advanced processing technologies to meet this fast-growing demand.

This is a golden opportunity for Vietnamese companies to , restructure their product lines, invest in deep-processing innovation and boost global competitiveness.

**Are you ready to  
ride the wave of  
this new  
consumer  
revolution?**





# MARKET

## UNITED STATES

In the US market alone, pangasius exports reached **158 million USD** as of mid-June, up 8% compared to last year. Frozen pangasius fillets continue to be the main product exported to the US, reaching 131 million USD in the first 5 months of the year, up 1% and accounting for **20% of Vietnam's total** pangasius fillet export value. In May, recorded the highest export value since the beginning of the year with 38 million USD, up 27% compared to May 2024.

**158million**    **8%**    **131million**    **20%**

In addition, dried pangasius and other frozen products also recorded positive growth, reaching nearly 3 million USD, up **66%** over the same period last year. However, the possibility of the US imposing a **20% tax from August 1, 2025** has caused many Vietnamese businesses to limit new orders and speed up deliveries. Many businesses have switched to deeply processed, high-quality products to increase value, while avoiding the risk of price increases after tax.

***The US imposing a 20% tax  
from August 1, 2025!!***

A decorative background at the bottom of the page featuring a white plate with two lemon slices, green herbs, and small black seeds, set against a red and white abstract background.





# MARKET IN THE WORLD

It's no longer just the U.S. — markets such as **Europe, Canada, Japan, and Mexico** are increasingly requesting more **highly processed seafood products from Vietnam**. Importers are looking beyond basic fillets. What they now expect are ready-to-eat products: pre-cooked, hygienically packaged, with sauces included, and even portion-sized for retail chains or restaurants. This marks a major shift: from selling "raw seafood" to delivering complete seafood meals.

In response, U.S. and EU importers are ramping up orders for value-added pangasius products, with Vietnam as the main supplier — as competitors like India and Indonesia still lack the capacity for advanced processing.

## **A Long-Term Strategy: Integration from Farm to Brand**

Deep processing cannot stand alone. It must be integrated across the entire value chain — from certified fingerlings and ASC/BAP-compliant farming areas to modern processing plants and cold-chain logistics. Raw fish must be uniform in size and meet strict quality standards to enable the production of IQF cooked portions or premium fish cakes.

Equally important is branding. A marinated, ready-packed tray product without a recognized brand is still just a contract manufacturing item. To truly capture value, Vietnam's pangasius industry must develop a national brand for processed products — much like Chile has done with salmon, or Norway with cod.

This is **NO LONGER A TREND** — it's a necessity. Companies that hesitate to restructure their portfolios, invest in processing technology, or develop their brands will be left behind. Meanwhile, those bold enough to innovate, invest, and lead the way will be the ones to capture **the highest value share of Vietnamese pangasius** in the global supply chain.

## **"No Turning Back"**

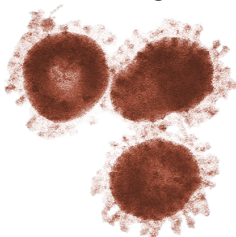
# PANGASIOUS INDUSTRY BULLETIN - RAINY SEASON WARNING: DISEASE PREVENTION MEASURES TIGHTENED



The rainy season is a high-risk period for disease outbreaks in pangasius farming, mainly due to bacteria like ***Vibrio*, *Aeromonas*, *Streptococcus*, and parasites** that thrive in unstable water conditions. Heavy rains wash acid sulfate soils and organic matter into ponds, lowering pH and triggering toxic gas releases ( $\text{NH}_3$ ,  $\text{H}_2\text{S}$ ,  $\text{NO}_2$ ), which directly affect fish health.

To prevent disease effectively, farmers are urged to strictly follow farming protocols:

- Thorough pond preparation: sludge removal, chemical disinfection (using approved substances)
- Use of quality fingerlings with clear origin
- Stocking at appropriate density
- Vaccination against common diseases such as bacillary necrosis and hemorrhagic septicemia



Provide feed suitable for the fish's growth stage, avoid moldy or spoiled feed. Supplement with digestive enzymes, vitamin C, squid liver oil, and probiotics to boost immunity. Monitor feed intake and fish health daily.

***Quarantine and disinfect fingerlings using  $\text{CuSO}_4$ , salt, or formalin. Keep feeding areas, tools, and nets clean. Disinfect regularly with quicklime or calcium hypochlorite. Hanging bags of neem leaves, *Justicia gendarussa*, or *Eclipta prostrata* in ponds can help reduce skin parasites.***

Monitor environmental parameters like DO, pH, alkalinity, and toxic gases. Apply biological treatments every 5–7 days. Wastewater must be treated before discharge. Disease surveillance samples should be taken at least once a month, and any abnormal fish deaths must be reported to local veterinary authorities immediately.







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# **PANGASIOUS NEWS**

## **RAW MATERIAL SITUATION**

### **STABLE SUPPLY, BIG OPPORTUNITY IN MERCOSUR DESPITE PERSISTENT COMPETITIVE PRESSURE**

July saw a relatively stable supply of domestic pangasius, with production from key farming regions in the Mekong Delta maintaining good levels, meeting the processing needs of factories. Pangasius raw material prices this month showed insignificant fluctuations compared to the previous month, indicating a balance between supply and demand in the domestic market.

Pangasius quality is well-controlled, ensuring compliance with increasingly strict technical and food safety standards from importing markets, especially as the Company is intensifying its penetration into the Mercosur bloc. Sustainable certified farming areas (ASC, GlobalGAP) continue to expand, strengthening the competitive position of Vietnamese pangasius.

Although the Mercosur market offers many opportunities, price competition pressure from international rivals still requires optimizing production costs and effective supply chain management. Climate change and environmental factors remain potential risks to the volume and quality of farmed fish





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# Shrimp news

## OVERVIEW

***Vietnam's shrimp exports in May 2025 recorded good growth since the beginning of the year, with both vannamei and black tiger shrimp growing in both output and value.***

In May 2025, vannamei shrimp exports reached 30,089 tons, up 23% compared to April and up 6% compared to the same period last year. The main vannamei shrimp export products include: boiled headless shrimp, peeled shrimp with frozen tails, sushi shrimp, steamed shrimp, fried shrimp with sauce, etc.

While vannamei shrimp accounted for a large proportion of total turnover, black tiger shrimp showed resilience in the high-end segment with a stable growth rate in May 2025. Black tiger shrimp export output reached 4,353 tons, up 8% compared to the previous month and 6% compared to the same period in 2024. Black tiger shrimp is mainly exported in the following forms: PTO/PDTO headless shrimp, whole shrimp, frozen peeled shrimp, steamed shrimp, HLSO shrimp.







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# Shrimp news

## US market

In the first 5 months of 2025, the US imported 340,955 tons of shrimp, worth 2.84 billion USD, up 15% and 24% respectively over the same period last year. This is the 7th consecutive month that the US has increased its shrimp imports despite uncertainties over tariff policies under President Donald Trump.

From April 5, 2025, a 10% reciprocal tax rate has been applied to imported goods from most countries, including shrimp. However, shrimp imports into the US still grew strongly, especially in April with an increase of 38% in volume and 47% in value compared to the same period in 2024. Notably, in May, although the growth rate slowed down (+2% in volume, +11% in value), the US still imported 65,044 tons of shrimp, reaching a turnover of 538 million USD.

In fact, businesses have rushed to export goods before July 9 - when the additional tax rates for each country (from 20-36%) are expected to officially take effect. As for Vietnam, Mr. Trump announced on social media on July 2 that Vietnamese goods will enter the United States at a tax rate of 20%, although transit goods will be taxed at 40%. Although there is no official document from the US government yet.



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# Shrimp news

## Chinese market

### ***China's shrimp imports fall in the first five months of this year***

China imported a total of 343,787 tonnes of shrimp in the first five months of 2025, down 7% year-on-year. Despite this volume decline, the total value of imports increased slightly to \$1.82 billion, up 2% year-on-year - reflecting stronger prices in recent months.

The value of imports increased to \$376 million, up 10% year-on-year. Ecuador remained the top supplier, accounting for more than 70% of imports with 52,055 tonnes (up 4% year-on-year). India showed a strong recovery with 14,088 tonnes (up 12%), reversing much of the previous decline. Thai shipments also rebounded to 2,024 tonnes (up 26%), while Venezuela continued its remarkable growth trajectory with 1,196 tonnes (up 66%). In contrast, imports from Argentina fell slightly to 1,350 tonnes (down 9%), indicating a slowdown after earlier increases.





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# Shrimp news

## Japanese market

Japan is a shrimp consumer market with high requirements for quality, appearance and processing level. Consumers in this country prefer refined shrimp products such as breaded shrimp, fried shrimp, sushi shrimp, nobashi shrimp... - product lines that are the strengths of Vietnamese enterprises. Currently, over 90% of Vietnamese shrimp exported to Japan are processed products with added value.

Vannamei shrimp accounts for 67% of the structure of shrimp products exported to Japan, black tiger shrimp accounts for 18%. Value-added products such as fried shrimp, sushi-ready shrimp are Vietnam's main competitive advantages. High processing level, beautiful appearance and good quality control help Vietnamese shrimp gain a firm foothold in large distribution systems in Japan.

However, to maintain and expand market share, Vietnam needs to continuously improve quality, reduce costs and invest in sustainable farming models - a direction highly appreciated by Japanese and international consumers.





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# SHRIMP NEWS

## RAW MATERIAL SITUATION

The domestic shrimp industry continues to face significant challenges but also recorded positive signals in July 2025. Following the impressive export value growth in the first 5 months of the year, pressure from reciprocal and anti-dumping duties from the US market (expected to take effect from July 9, 2025) is directly impacting the sentiment and raw material procurement plans of businesses.

Domestic raw shrimp prices continued a slight upward trend, indicating demand for procurement to fulfill orders before the US tariff deadline, as well as good demand from other major markets such as China, Japan, Korea, and the EU. Shrimp farming quality has improved, especially for whiteleg shrimp, with farms applying advanced technologies, minimizing disease risks.

The imposition of high tariffs by the US may lead some businesses to reduce procurement volume or seek alternative markets, putting pressure on raw material prices in the long term. Input costs for shrimp farming remain high, requiring farmers and businesses to continuously innovate to optimize efficiency. Increasingly stringent regulations on traceability and sustainability standards also pose a significant challenge.







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# TUNA NEWS

## Overview

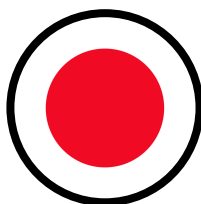
Vietnam's tuna exports continued to increase in May 2025, bringing the total export value in the first 5 months of the year to 405 million USD. Exports to major markets in the first 5 months of the year remained higher than the same period last year.

### TOP 5 IMPORT MARKETS OF VIETNAMESE TUNA, JANUARY - MAY, 2025



**THE EU**

23%, ↑ 16%



**JAPAN**

4%, ↑ 16%

**THE USA**

41%, ↑ 16%



**THAILAND**

4%, ↑ 180%



**CANADA**

4%, ↑ 11%

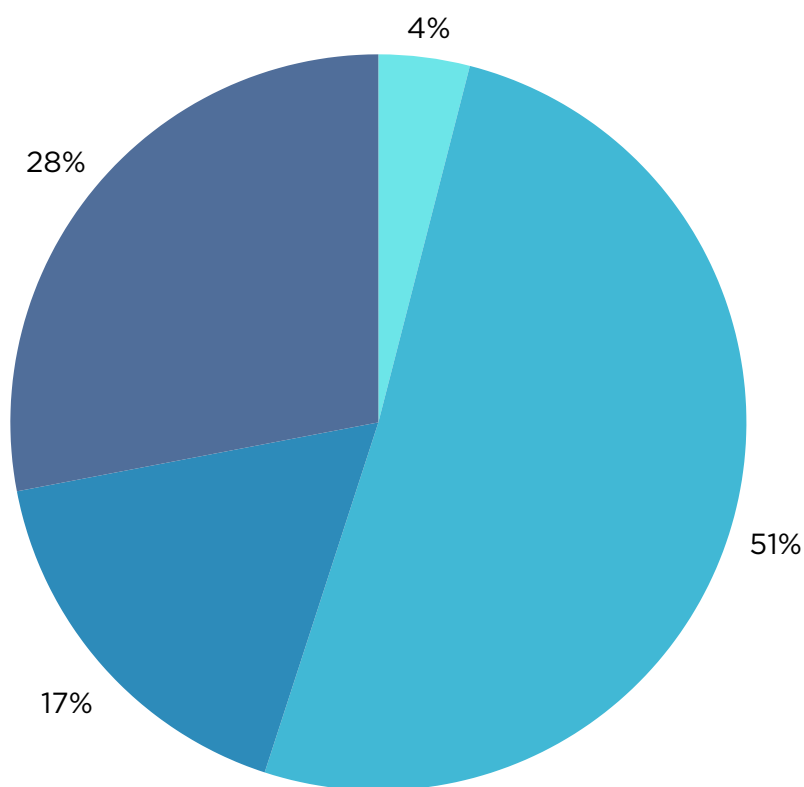


# TUNA NEWS

## OVERVIEW

### STRUCTURE OF EXPORTED TUNA PRODUCTS

- Fresh, frozen and dried tuna, ↓19%
- Frozen tuna meat/ loins, ↑16%
- Other prepared tuna, ↑23%
- Canned tuna, ↓14%







# TUNA NEWS

## The USA market

Tuna exports to the US, after slowing down in April due to concerns about the US's "reciprocal tax", increased sharply again in May with an increase of 37%. This shows that tuna exporters have responded quickly, increasing deliveries to the US to avoid the risk of being subject to higher taxes.

## The EU market

Exports to the EU reversed course and decreased in May. Exports to this market fell by 11% in May. Exports to the two largest import markets of the bloc, the Netherlands and Italy, although still maintaining growth momentum, slowed down to 11% and 15% respectively. At the same time, exports to the German market fell more sharply compared to the same period last year.

## The Middle East market

The increasingly tense conflict between Israel and Iran has caused exports to this market to decline. Tuna exports to Israel continued to decline sharply in May, down 42% compared to the same period last year. Along with Israel, exports to Saudi Arabia and the UAE also fell sharply, down 89% and 52%, respectively.

## The CPTPP market

Export value to this market bloc increased again in May with an increase of 25%. Exports to the leading import markets of the bloc, Japan and Canada, recovered and increased sharply in May.





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# TUNA NEWS

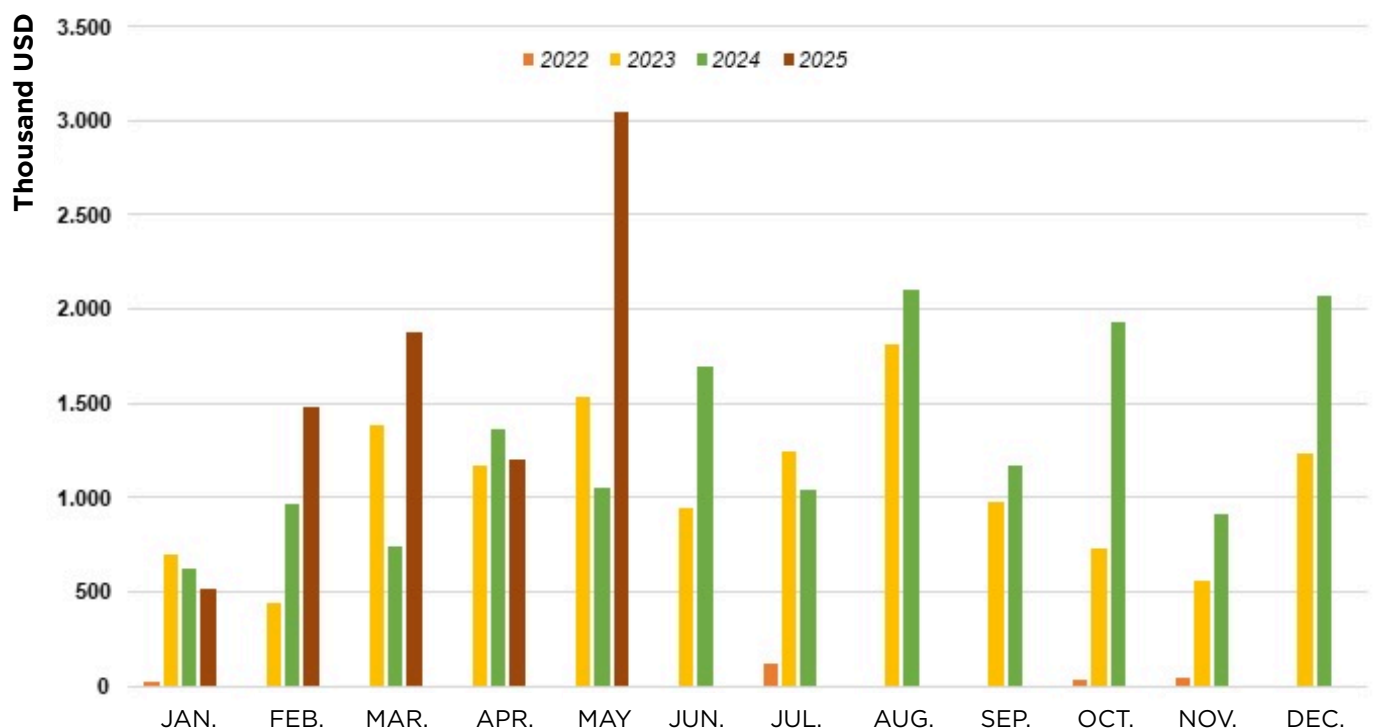
## Lithuanian market

According to ITC statistics, Lithuania is the 12th largest seafood import market in the EU, accounting for 1.2% of the total value of seafood imports of the EU. Vietnam is the 6th largest seafood supplier to Lithuania from outside the EU in 2022, accounting for 3.54% of the total value of seafood imports of the EU.

According to statistics from Vietnam Customs, tuna export turnover to this market has increased from 229 thousand USD in 2021 to nearly 16 million USD in 2024, an increase of 69 times. In the first 5 months of 2025 alone, tuna export turnover to Lithuania doubled compared to the same period last year, reaching more than 8 million USD.

Frozen tuna meat/loin products (HS code 0304) are the main export products to this market, accounting for 98% of total export turnover.

**VIETNAM'S TUNA EXPORT TO LITHUANIA**







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