

REPORT ON VIETNAM PANGASIOUS SECTOR, 2015 – 2019

I. SUMMARY

- Average growth in farming area, production and exports of pangasius in 5 years (2015 – 2019)
- Overall performance in export trend to main markets (EU, China, the US, ASEAN...) with large proportion (%) in Vietnam's total pangasius exports.

Table 1. Production (farming area – yield) and exports of Vietnamese pangasius (2015 – 2019)

II. PRODUCTION

- Trend of farming area and yield of pangasius, 2015 – 2019
- Performance and trend of pangasius price, 2015 – 2019
- Analyze the production in main producing provinces (mainly in the Mekong Delta)
- The production situation of pangasius seed as of 2019, the number of pangasius seed producing facilities of Vietnam
- Certifications: VietGap, ASC, Global Gap

Figure 1. Farming area and yield of Vietnam pangasius, 2015-2019

Table 2. Pangasius production by localities, 2010-2019

Figure 2. Raw pangasius price in Dong Thap, 2015 – 2019

III. EXPORTS

1. Summary

- Position of pangasius exports: The proportion of pangasius exports out of total seafood exports, 2015-2019
- Analyze the performance, revenue of pangasius exports from 2015 to 2019; Trend, fluctuation, impacts on exports

Table 3. Vietnam's pangasius exports (US\$mil.), the pangasius proportion in total seafood exports, 2015 – 2019

Figure 3. Vietnam's pangasius exports, 2015-2019

Figure 4. Vietnam's pangasius exports, Jan 2015 – Dec 2019

2. Products

- The structure of export pangasius products by HS code, main products (proportion and trend)

3. Markets

- The proportion of top 5 main importing markets of Vietnamese pangasius
- Summarize, analyze the performance, growth in Vietnam's exports to top 5 markets, position of markets

Figure 5. The proportion of importing markets of Vietnamese pangasius, 2015 - 2019

Figure 6. Top 5 importing markets of Vietnamese pangasius, 2015-2019

Figure 7. Top 5 importing markets of Vietnamese pangasius (Jan 2015 – Dec 2019)

Table 4. Importing markets of Vietnamese pangasius (2015 - 2019) (Value: US\$)

Table 5. Top 10 largest importing markets of Vietnamese pangasius (Value: US\$), growth and proportion: %)

3. Exports to main markets

3.1. EU

- Position, proportion of the EU market in 5 years (2015- 2019)
- Performance of exports to the EU in 5 years (2015- 2019), growth in 2019 over 2015, average growth in 5 years
- Evaluate the trend and revenue in exports to the EU, export price, impact factors (supply-demand, market regulation...)
- Main pangasius products exported to the EU

- Top pangasius exporters to the EU in 2019
- Import trend of catfish and white fish (tilapia, cod, pollock) into the EU

Figure 8. Vietnam's pangasius exports to the EU, 2015-2019 (Value-growth)

Table 6: Imports of white fish and catfish into the EU, 2015 – 2019 (Volume-Value by species)

Table 7. Catfish imports into the European countries, 2015-2019

Table 8. White fish imports into the EU from suppliers, 2015-2019 (Value: US\$thousand, Source: ITC)

Table 9. Top pangasius exporters of Vietnam to the EU

Figure 9. Average export price of pangasius fillet to the EU, 2019 – 2020

3.2. The US

- Position, proportion of the US market in 5 years (2015- 2019)
- Performance of exports to the US in 5 years (2015- 2019), growth in 2019 over 2015, average growth in 5 years
- Evaluate the trend and revenue in exports to the US, export price, impact factors (supply-demand, market regulation...)
- Anti-dumping duties from 2015 to 2019, catfish inspection program
- Impacts of the US-China trade war on pangasius exports to the US
- Main pangasius products exported to the US
- Top pangasius exporters to the US in 2019
- Import trend of catfish and white fish (tilapia, cod, pollock) into the US

Figure 10. Vietnam's pangasius exports to the US, 2015-2019

Figure 11. Vietnam's pangasius exports to the US (Jan 2015 – Dec 2019)

Figure 12. Average export price of Vietnamese pangasius to the US in 2019

Table 10. Top pangasius exporters of Vietnam to the US

Table 11: Anti-dumping duties on Vietnamese pangasius exported to the US from 2015 to 2019 according to POR

Table 12: Imports of white fish and catfish into the US, 2015 – 2019 (Volume-Value by species)

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3.3 China

- Position, proportion of the Chinese market in 5 years (2015- 2019)
- Performance of exports to China in 5 years (2015- 2019), growth in 2019 over 2015, average growth in 5 years
- Evaluate the trend and revenue in exports to China, export price, impact factors (supply-demand, market regulation...)
- Impacts of the US-China trade war on pangasius exports to China
- Main pangasius products exported to China
- Top pangasius exporters to China in 2019
- Import trend of catfish and white fish (cod, pollock) into China

Figure 13. Vietnam's pangasius exports to China, 2015-2019

Figure 14. Vietnam's pangasius exports to China (Jan 2015 – Dec 2019)

Figure 15. Average export price of Vietnamese pangasius to China in 2019

Table 13. Top pangasius exporters of Vietnam to China

Table 14: Imports of white fish and catfish into China, 2015 – 2019 (Volume-Value by species)

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3.4. The ASEAN

- Position, proportion of the ASEAN market in 5 years (2015- 2019)
- Performance of exports to the US in 5 years (2015- 2019), growth in 2019 over 2015, average growth in 5 years
- Evaluate the trend and revenue in exports to the US, export price, impact factors (supply-demand, market regulation...)
- Main pangasius products exported to the ASEAN
- Top pangasius exporters to the ASEAN in 2019

Figure 15. Vietnam's pangasius exports to the ASEAN, 2015-2019

Figure 16. Vietnam's pangasius exports to the ASEAN(Jan 2015 –Dec 2019)

*Table 14.*Top pangasius exporters of Vietnam to the ASEAN

3.5. Mexico

- Position, proportion of the Mexican market in 5 years (2015- 2019)
- Performance of exports to China in 5 years (2015- 2019), growth in 2019 over 2015, average growth in 5 years
- Evaluate the trend and revenue in exports to China, export price, impact factors (supply-demand, market regulation...)
- Main pangasius products exported to Mexico
- Top pangasius exporters to Mexico in 2019

Figure 15. Vietnam's pangasius exports to Mexico, 2015-2019

Figure 16. Vietnam's pangasius exports to Mexico(Jan 2015 –Dec 2019)

*Table 14.*Top pangasius exporters of Vietnam to Mexico

IV. IMPORT TAX ON PANGASIOUS IN SOME MAIN MARKETS

Table 15. Import tax on pangasius fillet in main markets

V. TOP PANGASIOUS EXPORTERS, 2015-2019

Table 16. Top 10 pangasius exporters in 2015

Table 17. Top 10 pangasius exporters in 2016

Table 18. Top 10 pangasius exporters in 2017

Table 19. Top 10 pangasius exporters in 2018

Table 20. Top 10 pangasius exporters in 2019

VI. PLAN AND FORECAST IN 2020

1. Pangasius production

2. Opportunities – Challenges and forecast on exports to markets

2.1. Impacts of Covid 19 on pangasius exports

2.2. Forecast on exports to markets

2.2.1. EU

EVFTA expected take into effect in August 2020 may help to boost exports to the market in next years

Import taxes of pangasius into the EU after EVFTA takes effect

The EU prohibits ethoxyquin in aquatic feed

Forecast on pangasius exports to the EU in 2020

2.2.2. The US:

- Lower demand because of Covid-19
- US-China trade tension

- Forecast on pangasius exports to the US in 2020.

2.2.3.China:

- Lower demand because of Covid-19

- US-China trade tension

- Forecast on pangasius exports to China in 2020.

3. Total pangasius exports in 2020

*Table 21.*Forecast on pangasius exports to markets in 2020