

CONTENTS

PREFACE	9	CHAPTER IV. TUNA EXPORT	68
CHAPTER I. OVERVIEW ON VIETNAM SEAFOOD		I. TUNA EXPORTS	69
PRODUCTION AND EXPORTS	10	1. Tuna products for export	69
I. OVERVIEWS	11	2. Export markets	70
II. PRODUCTION	13	3. Tuna exporters	80
III. EXPORTS	14	II. IMPORTS	81
1. Products	14	CHAPTER V. EXPORT OF CEPHALOPOD AND OTHER	
2. Markets	20	MARINE PRODUCTS	82
3. Vietnam seafood exporters	23	I. CEPHALOPOD	83
IV. IMPORTS	25	1. Products	83
CHAPTER II. SHRIMP PRODUCTION AND		2. Markets	83
EXPORTS	27	3. Imports of cephalopod	94
I. OVERVIEW	28	II. MOLLUSK SHELL	94
II. PRODUCTION	29	1. Products	94
III. EXPORTS	31	2. Markets	95
1. Products	31	III. CRABS	96
2. Markets	33	1. Overview	96
3. Top shrimp exporters of Vietnam	48	2. Markets	97
IV. IMPORTS	48	IV. FISH CAKE AND SURIMI	99
CHAPTER III. PANGASIOUS PRODUCTION AND		1. Overview	99
EXPORTS	50	2. Markets	99
I. PRODUCTION	51	CHAPTER VI. OPPORTUNITIES – CHALLENGES –	
1. Output	51	FORECASTS	101
2. Price of raw pangasius	51	I. OPPORTUNITIES AND CHALLENGES	102
II. EXPORTS	52	II. FORECAST	103
1. Products	53		
2. Market	53		
3. Top 5 Vietnam pangasius exporters	67		

LIST OF TABLES

Table 1. Vietnam quarterly seafood exports in 2023, by products (US\$ mil.)	13
Table 2. Vietnam quarterly seafood exports to markets in 2023 (US\$ mil.)	17
Table 3. Top 100 Vietnam seafood exporters in 2023	18
Table 4. Vietnam seafood imports in 2022-2023, by products (US\$ mil.)	19
Table 5. Top seafood suppliers to Vietnam, 2022-2023 (US\$ mil.)	20
Table 6. Vietnam shrimp products for exports in 2023	26
Table 7. Vietnam shrimp exports to markets, QIV/2023 (US\$ mil.)	27
Table 8. Vietnam shrimp exports to markets in 2023 (US\$ mil.)	28
Table 9. Top 10 import markets for Vietnam black tiger shrimp in 2023	28
Table 10. Top 10 import markets for Vietnam whiteleg shrimp in 2023	28
Table 11. Vietnam shrimp products exported to the US in 2023	29
Table 12. Top suppliers of shrimp HS code 0306170041 (farmed peeled frozen shrimp) to the US	30
Table 13. Top shrimp suppliers to the US, Jan - Nov 2023	30
Table 14. Top shrimp products imported into the US, by HS code, Jan - Nov 2023	31
Table 15. Vietnam shrimp products exported to the EU in 2023	33
Table 16. Top 10 Vietnam shrimp exporters to Germany in 2023	33
Table 17. Shrimp imports into some main markets in EU-27	34
Table 18. Top shrimp suppliers to EU-27	34
Table 19. Vietnam shrimp products exported to Japan in 2023	35
Table 20. Top 10 Vietnam shrimp exporters to Japan in 2023	36
Table 21. Top shrimp suppliers to Japan, Jan – Nov 2023	36
Table 22. Shrimp products imported into Japan, Jan – Nov 2023	37
Table 23. Vietnam shrimp products exported to South Korea in 2023	38
Table 24. Top 10 Vietnam shrimp exporters to South Korea in 2023	38
Table 25. Top shrimp suppliers to South Korea, Jan – Nov 2023	39
Table 26. Shrimp products imported into South Korea, Jan – Nov 2023	39
Table 27. Vietnam shrimp products exported to China & HK in 2023	40
Table 28. Top 10 Vietnam shrimp exporters to China in 2023	41
Table 29. Top 5 shrimp exporters of Vietnam in 2023 (US\$ mil.)	43
Table 30. Top 20 shrimp suppliers to Vietnam in 2023/2022 (US\$)	44
Table 31. Shrimp imports into Vietnam, by species in 2023/2022 (US\$)	44
Table 32. Vietnam pangasius products for export, QIV 2022-2023 (USD)	48
Table 33. Vietnam pangasius products for export in 2023	48
Table 34. Vietnam pangasius exports to markets, QIV 2023 (US\$ mil.)	49
Table 35. Vietnam pangasius exports to the markets in 2023 (US\$ mil.)	50
Table 36. Vietnam pangasius products exported to the US, QIV 2022-2023 (USD)	51
Table 37. Vietnam pangasius products exported to the US, 2022-2023 (USD)	51
Table 38. White fish products imported by the US, Jan-Oct 2022 - 2023	52
Table 39. Top 10 Vietnam pangasius exporters to the US in 2023	53

Table 40. Vietnam pangasius products exported to EU, QIV 2022-2023 (USD)	54
Table 41. Vietnam pangasius products exported to EU, 2022-2023 (USD)	54
Table 42. Vietnam pangasius exports to EU member countries EU, 2022-2023	55
Table 43. Top 10 Vietnam pangasius exporters to Germany in 2023	55
Table 44. Vietnam pangasius products exported to China & Hongkong, QIV 2022-2023 (USD)	56
Table 45 Vietnam pangasius products exported to China & Hongkong, 2022-2023	56
Table 46. Top 10 Vietnam pangasius exporters to China in 2023	578
Table 47. Vietnam pangasius products exported to Mexico, QIV 2022-2023	58
Table 48. Vietnam pangasius products exported to Mexico, 2022-2023	58
Table 49. Top 10 Vietnam pangasius exporters to Mexico in 2023	59
Table 50. Vietnam pangasius products exported to UK, QIV 2022-2023	60
Table 51. Vietnam pangasius products exported to UK, 2022-2023	60
Table 52. White fish products imported by UK, Jan-Nov 2022 – 2023	61
Table 53. Top 10 Vietnam pangasius exporters to UK in 2023	61
Table 54. Vietnam pangasius products exported to Brazil, QIV 2022-2023	62
Table 55. Vietnam pangasius products exported to Brazil, 2022-2023	62
Table 56. Top 10 Vietnam pangasius exporters to Brazil in 2023	63
Table 57. Top 5 Vietnam pangasius exporters in 2023	64
Table 58. Vietnam tuna products for exports in 2023	67
Table 59. Vietnam's tuna exports to markets in QIV 2023	68
Table 60. Export of Vietnamese tuna to markets in 2023	68
Table 61. Top 10 fresh/frozen tuna export markets (HS code 03) of Vietnam, in 2023	68
Table 62. Top 10 canned processed tuna export markets (HS code 16) of Vietnam, 2023	68
Table 63. Vietnam's tuna import markets in 2023	69
Table 64. Vietnamese tuna products exported to the US, in 2023	70
Table 65. Top 10 tuna suppliers to the US	72
Table 66. Top 10 Vietnamese tuna exporters to the US in 2023	72
Table 67. Vietnamese tuna products exported to the EU, 2023	73
Table 68. EU tuna imports, Jan-Oct 2022- 2023	73
Table 69. Top 10 Vietnamese tuna exporters to EU in 2023	74
Table 70. Top 10 frozen steamed tuna loin supplies for EU, Jan-Sep 2023	74
Table 71. EU canned tuna imports from small supplies, Jan-Sep 2022-2023	74
Table 72. Vietnamese tuna products exported to Japan, in 2023	75
Table 73. Top 10 Vietnamese tuna exporters to Japan in 2023	76
Table 74. Top 20 tuna suppliers for Japan, Jan-Nov 2022 - 2023	77
Table 75. Top 5 Vietnam tuna exporters in 2023	77
Table 76. Tuna suppliers to Vietnam in 2023	78
Table 77. Vietnam cephalopod exports in 2023, by products	81
Table 78. Vietnam cephalopod exports to markets, QIV/2023	82

<i>Table 79. Vietnam cephalopod exports to markets in 2023</i>	82
<i>Table 80. Vietnam squid & cuttlefish exports to top 10 markets in 2023</i>	83
<i>Table 81. Vietnam octopus exports to top 10 markets in 2023</i>	83
<i>Table 82. Vietnam cephalopod exports to S. Korea in 2023, by products</i>	84
<i>Table 83. Top 10 Vietnam cephalopod exporters to S. Korea in 2023</i>	85
<i>Table 84. Top cephalopod suppliers to South Korea, Jan - Nov 2023</i>	86
<i>Table 85. South Korea cephalopod imports, by products, Jan - Nov 2023</i>	86
<i>Table 86. Vietnam cephalopod exports to Japan in 2023, by products</i>	88
<i>Table 87. Top 10 Vietnam cephalopod exporters to Japan in 2023</i>	88
<i>Table 88. Top cephalopod suppliers to Japan, Jan - Nov 2023</i>	89
<i>Table 89. Japan cephalopod imports, by products, Jan - Nov 2023</i>	89
<i>Table 90. Vietnam cephalopod exports to China & HK in 2023, by products</i>	90
<i>Table 91. Top 10 Vietnam cephalopod exporters to China in 2023</i>	90
<i>Table 92. Vietnam cephalopod exports to EU in 2023, by products</i>	91
<i>Table 93. Top 10 Vietnam cephalopod exporters to Italy in 2023</i>	91
<i>Table 94. Top 20 cephalopod suppliers to Vietnam in 2023</i>	93
<i>Table 95. Vietnam cephalopod imports in 2023, by species</i>	93
<i>Table 96. Vietnam mollusk shell exports in 2022-2023</i>	94
<i>Table 97. Vietnam clam exports to markets in 2022-2023</i>	94
<i>Table 98. Vietnam crab exports in QIV/2023, by species</i>	96
<i>Table 99. Vietnam crab exports in 2023, by species</i>	96
<i>Table 100. Vietnam crab exports in 2022 – 2023, by products</i>	96
<i>Table 101. Vietnam crab exports to markets in QIV/2023</i>	97
<i>Table 102. Vietnam crab exports to markets in 2023</i>	97
<i>Table 103. Top Vietnam crab exporters in 2023</i>	98
<i>Table 104. Vietnam surimi exports to markets in QIV/2023</i>	99
<i>Table 105. Vietnam surimi exports to markets in 2023</i>	99
<i>Table 106. Top 10 Vietnam surimi exporters in 2023</i>	100

LIST OF FIGURES

Figure 1. Vietnam quartly seafood exports in 2022-2023	11
Figure 2. Vietnam fishery production in 2018-2023 (1,000 MT)	12
Figure 3. Average prices of Vietnam whiteleg shrimp and pangasius exported to the US	14
Figure 4. Top 20 products with negative growths in exports in 2023	15
Figure 5. Top 20 products with positive growths in exports in 2023	15
Figure 6. Vannamei shrimp farm gate Vietnam, 40 pcs/kg	24
Figure 7. Vannamei shrimp farm gate Vietnam, 60 pcs/kg	24
Figure 8. Vannamei shrimp farm gate Vietnam, 100 pcs/kg	24
Figure 9. Black Tiger shrimp farm gate Vietnam, 30 pcs/kg	25
Figure 10. Black Tiger shrimp farm gate Vietnam, 50 pcs/kg	25
Figure 11. Black Tiger shrimp farm gate Vietnam, 60 pcs/kg	25
Figure 12. Vietnam shrimp exports, by species, 2022 (Value)	26
Figure 13. Vietnam shrimp exports, by species, 2023 (Value)	26
Figure 14. Vietnam shrimp exports, by markets, 2022 (Value)	28
Figure 15. Vietnam shrimp exports, by markets, 2023 (Value)	28
Figure 16. Vietnam shrimp exports to the US in 2023	29
Figure 17. Average price of frozen shrimp exported to the US, Jan 2022-Dec 2023	30
Figure 18. Vietnam shrimp exports to EU in 2023	32
Figure 19. Average price of frozen shrimp exported to Germany, Jan 2022-Dec 2023 (US\$/kg)	33
Figure 20. Vietnam shrimp exports to Japan in 2023	35
Figure 21. Average price of frozen shrimp exported to Japan, Jan 2022-Dec 2023	36
Figure 22. Vietnam shrimp exports to S.Korea in 2023	37
Figure 23. Average price of frozen shrimp exported to S.Korea, Jan 2022-Dec 2023 (US\$/kg)	38
Figure 24. Vietnam shrimp exports to China&HK in 2023	40
Figure 25. Average price of frozen shrimp exported to China, Jan 2022-Dec 2023	41
Figure 26. China's frozen warmwater shrimp imports by supplier, 2023	42
Figure 27. China's frozen shrimp imports by category, 2023	42
Figure 28. Price evolution of grade I pangasius in Dong Thap, 2022 - 2023	46
Figure 29. Pangasius Vietnam- Farm Gate price, 800-1000g	47
Figure 30. Pangasius Vietnam- Farm Gate price, 1000-1200g	47
Figure 31. Pangasius Vietnam- Farm Gate price, 1200+	47
Figure 32. Vietnam pangasius exports, QIV/2022-2023	48
Figure 33. Vietnam pangasius exports to main markets, 2022- 2023	49
Figure 34. Structure of pangasius import markets in 2022 (value)	50
Figure 35. Structure of pangasius import markets in 2023 (value)	50
Figure 36. Average prices of Vietnam exported pangasius, 2022- 2023	50
Figure 37. Vietnam pangasius export to the US, 2022-2023	51
Figure 38. Average prices of Vietnam exported pangasius to the US, 2022 - 2023	52
Figure 39. Vietnam pangasius export to EU, 2022-2023	54
Figure 40. Average prices of Vietnam exported pangasius to EU, 2022-2023	53

Figure 41. Vietnam pangasius export to China & Hongkong, 2022-2023	56
Figure 42. Average prices of Vietnam exported pangasius to China, 2022 - 2023	57
Figure 43. Vietnam pangasius export to Mexico, 2022-2023	58
Figure 44. Average prices of Vietnam exported pangasius to Mexico 2022-2023	58
Figure 45. Average prices of Vietnam exported pangasius to UK, 2022 - 2023	59
Figure 46. Vietnam pangasius export to UK, 2022-2023	60
Figure 47. Vietnam pangasius export to Brazil, 2022-2023	62
Figure 48. Vietnam pangasius export to Brazil, QIV 2022 - 2023	62
Figure 49. Average prices of Vietnam exported pangasius to Brazil, 2022-2023	63
Figure 50. Vietnam tuna exports by HS code in 2022-2023	66
Figure 51. Vietnam tuna exports in 2022-2023	67
Figure 52. Import markets of Vietnam tuna in 2023 (by value)	69
Figure 53. Import markets of Vietnam tuna in 2022 (by value)	69
Figure 54. Vietnam tuna exports to the US in 2022-2023	70
Figure 55. Average prices of Vietnam tuna HS code 03048700 exported to the US in 2022 - 2023 (USD/kg)	71
Figure 56. Average prices of Vietnam tuna HS code 1604144000 exported to the US in 2022 - 2023 (USD/kg)	71
Figure 57. Vietnam tuna exports to the EU in 2022 - 2023	73
Figure 58. Vietnam tuna exports to Japan in 2022 - 2023	75
Figure 59. Average prices of Vietnam tuna HS code 16041490 exported to the Japan in 2022 - 2023 (USD/kg)	75
Figure 60. Average prices of Vietnam tuna HS code HS 03048700 exported to the Japan in 2022 - 2023 (USD/kg)	76
Figure 61. Import markets of Vietnam cephalopod in 2022 (by value)	83
Figure 62. Import markets of Vietnam cephalopod in 2022 (by value)	83
Figure 63. Average prices of Vietnam frozen cephalopod exported to South Korea in 2022-2023	85
Figure 64. Vietnam cephalopod exports to S. Korea in 2022 - 2023	85
Figure 65. Average prices of Vietnam frozen cephalopod exported to Japan in 2022-2023	88
Figure 66. Vietnam cephalopod exports to Japan in 2022 - 2023	88
Figure 67. Average prices of Vietnam frozen cephalopod exported to China in 2022-2023	90
Figure 68. Vietnam cephalopod exports to China & HK in 2022 - 2023	91
Figure 69. Average prices of Vietnam frozen cephalopod exported to Italy in 2022-2023	92
Figure 70. Vietnam cephalopod exports to EU in 2022 - 2023	92
Figure 71. Vietnam crab exports in 2022-2023	95
Figure 72. Import markets of Vietnam crab in 2023 (by value)	97
Figure 73. Import markets of Vietnam crab in 2022 (by value)	97
Figure 74. Vietnam surimi exports in 2022 - 2023	98
Figure 75. Import markets of Vietnam surimi in 2023 (by value)	100
Figure 76. Import markets of Vietnam surimi in 2022 (by value)	100