

CONTENTS

PREFACE	9	3. Top pangasius exporters	61
CHAPTER I. OVERVIEW ON VIETNAM SEAFOOD PRODUCTION AND EXORTS	10	CHAPTER IV. TUNA EXPORTS	62
I. SEAFOOD PRODUCTION	11	I. EXPORTS	63
II. EXPORTS	11	1. Products	63
1. Overview	11	2. Markets	64
2. Products	13	3. Top tuna exporters	77
3. Markets	17	II. IMPORTS	77
4. Top seafood exporters	23	CHAPTER V. EXPORTS OF CEPHALOPOD AND OTHER MARINE PRODUCTS	79
III. IMPORTS	25	I. CEPHALOPOD	80
CHAPTER II: SHRIMP PRODUCTION AND EXPORTS	27	1. Products	80
I. PRODUCTION	28	2. Markets	80
1. Ouput	28	3. Imports	89
2. Prices of raw shrimp	28	II. MOLLUSK SHELLS	90
II. EXPORTS	31	1. Products	90
1. Products	31	2. Markets	91
2. Markets	32	III. CRAB	91
3. Top shrimp exporters	48	1. Overview	91
III. IMPORTS	48	2. Markets	92
CHAPTER III. PANGASIUS PRODUCTION AND EXPORTS	50	IV. SURIMI	94
I. PRODUCTION	51	1. Overview	94
1. Ouput	51	2. Markets	94
2. Prices of raw pangasius	51	CHAPTER VI. OPPORTUNITIES – CHALLENGES – FORECAST	95
II. EXPORTS	51	I. CHALLENGES	97
1. Products	51	II. OPPORTUNITIES	98
2. Markets	53	III. FORECAST	98

LIST OF TABLES

<i>Table 1. Vietnam fishery production, Q1/2023</i>	11
<i>Table 2. Vietnam seafood exports Q1/2023 (US\$ mil.)</i>	12
<i>Table 3. Vietnam seafood exports Q1/2023, by main products (US\$ mil.)</i>	13
<i>Table 4. Top 20 seafood products for exports, Q1/2022-2023 (US\$ mil.)</i>	13
<i>Table 5. Shrimp exports to top 10 markets, Q1/2022-2023 (US\$ mil.)</i>	14
<i>Table 6. Pangasius exports to top 10 markets, Q1/2022-2023 (US\$ mil.)</i>	15
<i>Table 7. Exports of marine products to top 10 markets, Q1/2022-2023 (US\$ mil.)</i>	16
<i>Table 8. Tuna exports to top 10 markets, Q1/2022-2023 (US\$ mil.)</i>	16
<i>Table 9. Cephalopod exports to top 10 markets, Q1/2022-2023 (US\$ mil.)</i>	17
<i>Table 10. Top 10 seafood species exported to the US, Q1/2022-2023 (US\$ mil.)</i>	18
<i>Table 11. Top 10 seafood species exported to Japan, Q1/2022-2023 (US\$ mil.)</i>	19
<i>Table 12. Top 10 seafood species exported to China &HK, Q1/2022-2023 (US\$ mil.)</i>	20
<i>Table 13. Top 10 seafood species exported to China, Q1/2022-2023 (US\$ mil.)</i>	20
<i>Table 14. Top 10 seafood species exported to South Korea, Q1/2022-2023 (US\$ mil.)</i>	21
<i>Table 15. Top 10 seafood species exported to EU, Q1/2022-2023 (US\$ mil.)</i>	22
<i>Table 16. Vietnam seafood exports to EU members, Q1/2022-2023 (US\$ mil.)</i>	22
<i>Table 17. Top 10 Vietnam seafood exporters, Q1/2023 (US\$ mil.)</i>	23
<i>Table 18. Top 100 Vietnam seafood exporters, Q1/2023 (US\$ mil.)</i>	24
<i>Table 19. Vietnam seafood imports, by main products (US\$ mil.)</i>	26
<i>Table 20. Top 20 seafood exporters to Vietnam, Q1/2022-2023 (US\$ mil.)</i>	26
<i>Table 21. Vietnam shrimp products for exports, Q1/2023 (US\$ mil.)</i>	31
<i>Table 22. Shrimp exports to main markets, Q1/2023 (US\$ mil.)</i>	33
<i>Table 23. Top 10 import markets of Vietnam whiteleg shrimp, Q1/2023 (US\$ mil.)</i>	33
<i>Table 24. Top 10 import markets of Vietnam black tiger shrimp, Q1/2023 (US\$ mil.)</i>	33
<i>Table 25. Vietnam shrimp products exported to the US, Q1/2023 (US\$ mil.)</i>	34
<i>Table 26. Top 10 Vietnam shrimp exporters to the US, Q1/2023</i>	34
<i>Table 27. Top 10 shrimp suppliers to the US, Jan - Feb 2023</i>	36
<i>Table 28. Top 10 shrimp products imported into the US, by HS code, Jan - Feb 2023</i>	37
<i>Table 29. US's shrimp imports from Vietnam, Jan - Feb 2023</i>	37
<i>Table 30. Vietnam shrimp products exported to EU, Q1/2023 (US\$ mil.)</i>	38
<i>Table 31. Vietnam shrimp exports to EU, Q1/2023 (US\$ mil.)</i>	39
<i>Table 32. Top 10 Vietnam shrimp exporters to Germany, Q1/2023</i>	39
<i>Table 33. Shrimp imports into main markets of EU</i>	40
<i>Table 34. Vietnam shrimp products exported to Japan, Q1/2023 (US\$ mil.)</i>	41
<i>Table 35. Top 10 Vietnam shrimp exporters to Japan, Q1/2023</i>	41
<i>Table 36. Japan shrimp imports, Jan - Feb 2023</i>	43
<i>Table 37. Japan's shrimp imports, by products, Jan - Feb 2023</i>	43
<i>Table 38. Vietnam shrimp products exported to South Korea, Q1/2023 (US\$ mil.)</i>	44
<i>Table 39. Top 10 Vietnam shrimp exporters to South Korea, Q1/2023</i>	45
<i>Table 40. South Korea shrimp imports, Jan - Feb 2023 (1,000 USD)</i>	46

<i>Table 41. South Korea shrimp imports, by products, Jan - Feb 2023 (1,000 USD)</i>	46
<i>Table 42. Vietnam shrimp products exported to China & HK, Q1/2023 (US\$ mil.)</i>	47
<i>Table 43. Vietnam shrimp products exported to China, Q1/2023 (US\$ mil.)</i>	47
<i>Table 44. Top 10 Vietnam shrimp exporters to China, Q1/2023</i>	47
<i>Table 45. Top 10 Vietnam shrimp exporters, Q1/2023 (US\$ mil.)</i>	48
<i>Table 46. Vietnam shrimp imports, Q1/2023</i>	49
<i>Table 47. Vietnam's imported shrimp products, Q1/2023</i>	49
<i>Table 48. Pangasius products for exports, Q1/2022-2023 (US\$ mil.)</i>	52
<i>Table 49. Average export price of pangasius, Q1/2022-2023 (USD/kg)</i>	52
<i>Table 50. Pangasius export to main markets, Q1/2023 (US\$ mil.)</i>	53
<i>Table 51. Average export price of pangasius to markets (USD/kg)</i>	54
<i>Table 52. Pangasius products for exports to China, Q1/2022-2023 (US\$ mil.)</i>	54
<i>Table 53. Top 10 pangasius exporters to China, Q1/2023</i>	55
<i>Table 54. Import of pangasius into China, by locality, Q1/2023</i>	55
<i>Table 55. Pangasius products for exports to the US, Q1/2022-2023 (US\$ mil.)</i>	56
<i>Table 56. Top 10 pangasius exporters to the US, Q1/2023</i>	56
<i>Table 57. Top 10 white fish products imported into the US, Jan - Feb 2023</i>	57
<i>Table 58. Pangasius products for exports to EU, Q1/2022-2023 (US\$ mil.)</i>	57
<i>Table 59. Pangasius export to EU member countries, Q1/2022-2023 (US\$ mil.)</i>	57
<i>Table 60. Top 10 pangasius exporters to Netherland, Q1/2023</i>	58
<i>Table 61. Top 10 pangasius exporters to Germany, Q1/2023</i>	58
<i>Table 62. Top 10 pangasius exporters to Brazil, Q1/2023</i>	59
<i>Table 63. Brazil's imported white fish products, Jan - Feb 2022 - 2023</i>	59
<i>Table 64. Pangasius products for exports to UK, Q1/2022-2023 (US\$ mil.)</i>	59
<i>Table 65. Top 10 pangasius exporters to UK, Q1/2023</i>	60
<i>Table 66. UK's imported white fish products, Jan - Feb 2022 – 2023</i>	60
<i>Table 67. Top 10 pangasius exporters, Q1/2023</i>	61
<i>Table 68. Vietnam's export tuna products, Q1/2023 (US\$ mil.)</i>	63
<i>Table 69. Vietnam's tuna exports to markets, Q1/2023 (US\$ mil.)</i>	65
<i>Table 70. Top 10 export markets for fresh/frozen tuna (HS code 03) of Vietnam, Q1/2023 (US\$ mil.)</i>	65
<i>Table 71. Top 10 export markets for canned tuna (HS code 16) of Vietnam, Q1/2023 (US\$ mil.)</i>	65
<i>Table 72. Import markets of Vietnam's tuna, Q1/2023</i>	66
<i>Table 73. Vietnam tuna products exported to the US, Q1/2023 (US\$ mil.)</i>	67
<i>Table 74. Top 10 tuna suppliers with HS code 030487 for the US, 2021-2022</i>	69
<i>Table 75. Top 10 tuna suppliers with code HS160414 for the US, 2021-2022</i>	69
<i>Table 76. Top 10 Vietnam tuna exporters to the US, Q1/2023 (by value)</i>	69
<i>Table 77. Vietnam tuna products exported to EU, Q1/2023 (US\$ mil.)</i>	70
<i>Table 78. Top 10 tuna suppliers to the EU, 2021 – 2022 (1,000 USD)</i>	71
<i>Table 79. EU tuna imports, 2021 -2022 (1,000 USD)</i>	71
<i>Table 80. Top 10 Vietnam tuna exporters EU, Q1/2023 (by value)</i>	72

<i>Table 81. EU canned tuna imports, 2020 - 2022 (KL: tons, CFR price: EUR/ton)</i>	72
<i>Table 82. Suppliers of canned tuna to the EU, 2020 – 2022 (KL: tons, CFR price: EUR/ton)</i>	76
<i>Table 83. EU's imports of frozen steamed tuna loin, 2020 – 2022 (KL: tons, CFR price: EUR/ton)</i>	76
<i>Table 84. Suppliers of frozen steamed tuna loin to the EU, 2020 – 2022 (KL: tons, CFR price: EUR/ton)</i>	74
<i>Table 85. Vietnam tuna products exported to Japan, Q1/2023 (US\$ mil.)</i>	75
<i>Table 86. Top 10 Vietnam tuna exporters Japan, Q1/2023 (by value)</i>	76
<i>Table 87. Top 5 tuna suppliers with HS code 160414 for Japan, 2021 - 2022</i>	76
<i>Table 88. Top 5 tuna suppliers with HS code 160414 for Japan, Jan - Feb 2022 - 2023</i>	76
<i>Table 89. Top 5 Vietnam's tuna exporters, Q1/2023 (US\$ mil.)</i>	77
<i>Table 90. Tuna products imported into Vietnam, Q1/2023</i>	77
<i>Table 91. Tuna suppliers for Vietnam, Q1/2023 (USD)</i>	78
<i>Table 92. Vietnam's exports of cephalopod products, Q1/2023 (US\$ mil.)</i>	80
<i>Table 93. Vietnam's exports of cephalopod to main markets, Q1/2023 (US\$ mil.)</i>	81
<i>Table 94. Vietnam exports of squid and cuttlefish to top 10 markets, Q1/2023 (US\$ mil.)</i>	81
<i>Table 95. Vietnam octopus exports to top 10 markets, Q1/2023 (US\$ mil.)</i>	81
<i>Table 96. Cephalopod products exported to South Korea, Q1/2023 (US\$ mil.)</i>	82
<i>Table 97. Top Vietnam cephalopod exporters to South Korea, Q1/2023</i>	83
<i>Table 98. South Korea's imports of cephalopods, Jan - Feb 2023 (1,000 USD)</i>	83
<i>Table 99. South Korea's imports of cephalopods, by products, Jan - Feb 2023 (1,000 USD)</i>	84
<i>Table 100. Cephalopod products exported to Japan, Q1/2023 (US\$ mil.)</i>	84
<i>Table 101. Top Vietnam cephalopod exporters to Japan, Q1/2023</i>	85
<i>Table 102. Japan's cephalopod imports, Jan - Feb 2023 (1,000 USD)</i>	86
<i>Table 103. Japan's cephalopod imports, by products, Jan - Feb 2023 (1,000 USD)</i>	86
<i>Table 104. Cephalopod products exported to China, Q1/2023 (US\$ mil.)</i>	87
<i>Table 105. Top Vietnam cephalopod exporters to China, Q1/2023</i>	87
<i>Table 106. Cephalopod products exported to EU, Q1/2023 (US\$ mil.)</i>	88
<i>Table 107. Top Vietnam cephalopod exporters to Italy, Q1/2023</i>	89
<i>Table 108. Vietnam cephalopod imports, Q1/2023</i>	89
<i>Table 109. Vietnam cephalopod imports, by products, Q1/2023</i>	90
<i>Table 110. Vietnam mollusk shell exports, Q1/2023 (1,000 USD)</i>	90
<i>Table 111. Vietnam mollusk shell exports to main markets, Q1/2023 (1,000 USD)</i>	91
<i>Table 112. Top 10 clam exporters in Q1/2023</i>	91
<i>Table 113. Vietnam's exports of crabs and other crustaceans, by species, Q1/2023 (1,000 USD)</i>	92
<i>Table 114. Vietnam's exports of crabs and other crustaceans, by products, Q1/2023 (1,000 USD)</i>	92
<i>Table 115. Vietnam's crab exports to markets, Q1/2023 (USD)</i>	93
<i>Table 116. Top 10 crab exporters of Vietnam, Q1/2023</i>	93
<i>Table 117. Vietnam's exports fish cakes, surimi to markets, Q1/2023 (USD)</i>	95
<i>Table 118. Top 10 Vietnam exporters of fish cakes and surimi, Q1/2023</i>	95

LIST OF FIGURES

<i>Fig 1. Vietnam seafood exports Q1/2018-2023 (US\$ mil.)</i>	12
<i>Fig 2. Vietnam seafood exports to main markets, Jan - Mar 2022-2023</i>	17
<i>Fig 3. Ex-farm price of Vietnam's raw whiteleg shrimp, size 50 pc/kg</i>	29
<i>Fig 4. Ex-farm price of Vietnam's raw whiteleg shrimp, size 80 pc/kg</i>	29
<i>Fig 5. Ex-farm price of Vietnam's raw whiteleg shrimp, size 100 pc/kg</i>	29
<i>Fig 6. Ex-farm price of Vietnam's raw black tiger shrimp, size 20 pc/kg</i>	30
<i>Fig 7. Ex-farm price of Vietnam's raw black tiger shrimp, size 30 pc/kg</i>	30
<i>Fig 8. Ex-farm price of Vietnam's raw black tiger shrimp, size 40 pc/kg</i>	31
<i>Fig 9. Shrimp products for export, Jan - Mar 2022</i>	32
<i>Fig 10. Shrimp products for export, Jan - Mar 2023</i>	32
<i>Fig 11. Top 6 shrimp import markets of Vietnam, Jan - Mar 2023</i>	32
<i>Fig 12. Import markets of Vietnam shrimp, Q1/2022 (by value)</i>	33
<i>Fig 13. Import markets of Vietnam shrimp, Q1/2023 (by value)</i>	33
<i>Fig 14. Average export price of frozen shrimp to the US, Jan 2022 - Mar 2023 (USD/kg)</i>	35
<i>Fig 15. Vietnam shrimp exports to the US, Jan - Mar 2023</i>	35
<i>Fig 16. Average export price of frozen shrimp to Germany, Jan 2022 - Mar 2023</i>	39
<i>Fig 17. Vietnam shrimp exports to EU, Jan - Mar 2023</i>	40
<i>Fig 18. Top shrimp import markets in the EU in 2022 (US\$ mil.)</i>	40
<i>Fig 19. Top largest shrimp suppliers to the EU in 2022</i>	40
<i>Fig 20. Average export price of frozen shrimp to Japan, Jan 2022 - Mar 2023 (USD/kg)</i>	42
<i>Fig 21. Vietnam shrimp exports to Japan, Jan - Mar 2023</i>	42
<i>Fig 22. Average export price of frozen shrimp to South Korea, Jan 2022 - Mar 2023 (USD/kg)</i>	45
<i>Fig 23. Vietnam shrimp exports to South Korea, Jan - Mar 2023</i>	45
<i>Fig 24. Average export price of frozen shrimp to China Jan 2022 - Mar 2023 (USD/kg)</i>	48
<i>Fig 25. Vietnam shrimp exports to China&HK, Jan - Mar 2023</i>	48
<i>Fig 26. Price of raw pangasius grade I in Dong Thap, 2022-2023</i>	51
<i>Fig 27. Pangasius exports, Q1/2023</i>	51
<i>Fig 28. Vietnam pangasius exports to main markets, Q1/2023 (US\$ mil.)</i>	53
<i>Fig 29. Vietnam tuna export turnover, Q1/2019-2023</i>	63
<i>Fig 30. Vietnam's tuna exports under HS code, Jan 2022 - Mar 2023 (US\$ mil.)</i>	64
<i>Fig 31. Vietnam's tuna exports, Jan 2022 - Mar 2023</i>	64
<i>Fig 32. Import markets of Vietnam tuna, Q1/2023 (by value)</i>	65
<i>Fig 33. Import markets of Vietnam tuna, Q1/2023 (by value)</i>	65
<i>Fig 34. Vietnam tuna exports to the US, Jan 2022- Mar 2023</i>	67
<i>Fig 35. Average prices of Vietnam tuna HS code 03048700 exported to the US, Jan 2022 - Mar 2023</i>	67
<i>Fig 36. The US's tuna imports, Jan 2021-Jan 2023</i>	68
<i>Fig 37. Vietnam tuna exports to EU, Jan 2022- Mar 2023</i>	70
<i>Fig 38. Average export price of tuna meat/loin HS code 03048700 from Vietnam to Germany, T1/2022 - T12/2023 (USD/kg)</i>	70
<i>Fig 39. Average export price of tuna meat/loin HS code 03048700 of Vietnam to Netherland, Jan 2022 - Mar 2023 (USD/kg)</i>	71
<i>Fig 40. Vietnam's tuna exports to Japan, Jan 2022 - Mar 2023</i>	74

<i>Fig 41. Average export price of tuna with HS code 16041490 from Vietnam to Japan, Jan 2022 - Mar 2023</i>	75
<i>Fig 42. Average export price of tuna with HS code 03048700 from Vietnam to Japan, Jan 2022 - Mar 2023</i>	75
<i>Fig 43. Japan's tuna imports, Jan 2021 – Feb 2023</i>	76
<i>Fig 44. Import markets of Vietnam cephalopod, Q1/2022 (by value)</i>	81
<i>Fig 45. Import markets of Vietnam cephalopod, Q1/2023 (by value)</i>	81
<i>Fig 46. Average export price of frozen cephalopods from Vietnam to South Korea Jan 2022 - Mar 2023 (USD/kg)</i>	82
<i>Fig 47. Vietnam's cephalopod exports to South Korea, 2022 – 2023</i>	83
<i>Fig 48. Average export price of frozen cephalopods from Vietnam to Japan, Jan 2022 - Mar 2023 (USD/kg)</i>	85
<i>Fig 49. Vietnam's cephalopod exports to Japan , 2022 - 2023</i>	85
<i>Fig 50. Average export price of frozen cephalopods from Vietnam to China, Jan 2022 - Mar 2023</i>	87
<i>Fig 51. Vietnam's cephalopod exports to China & HK, 2022 - 2023</i>	87
<i>Fig 52. Average export price of frozen cephalopods from Vietnam to Italy, Jan 2022 - Mar 2023 (USD/kg)</i>	88
<i>Fig 53. Vietnam's cephalopod exports to EU, 2022 – 2023</i>	89
<i>Fig 54. Vietnam exports of mollusk shell, by product form, Q1/2022-2023</i>	90
<i>Fig 55. Vietnam crab exports, Jan 2022 - Mar 2023</i>	92
<i>Fig 56. Import markets of Vietnam crab, Q1/2023 (by value)</i>	93
<i>Fig 57. Import markets of Vietnam crab, Q1/2022 (by value)</i>	93
<i>Fig 58. Vietnam surimi exports, Jan 2022 - Mar 2023</i>	94
<i>Fig 59. Import markets of Vietnam surimi, Q1/2023 (by value)</i>	95
<i>Fig 60. Import markets of Vietnam surimi, Q1/2022 (by value)</i>	95

