

TABLE OF CONTENT

CHAPTER I. OVERVIEW ON VIETNAM SEAFOOD PRODUCTION AND EXPORTS	7
I. SUMMARY	7
II. FISHERY PRODUCTION	9
III. SEAFOOD EXPORTS	9
1. Export products	9
2.1. Shrimp and prawn exports	11
2.2. Pangasius exports	12
2.3. Tuna exports	13
2. Export markets	14
2.1. The US	15
2.2. Japan	16
2.3. The EU	17
2.4. China & Hongkong	18
2.5. South Korea	19
2.6. The UK	21
2.7. Australia	21
2.8. CPTPP markets	22
2.9. ASEAN markets	22
3. Vietnam seafood exporters	22
4. Seafood exports by locality	25
IV. SEAFOOD IMPORTS	26
1. Import products	26
2. Suppliers	27
CHAPTER II: SHRIMP EXPORTS	28
I. RAW SHRIMP PRODUCTION	28
1. Production	28
2. Raw shrimp price	28
II. EXPORTS	30
1. Export products	30
2. Export markets	31
2.1. The US	33
2.2. EU	37

2.3. Japan	40
2.4. South Korea	43
2.5. China and Hongkong	46
3. Top Vietnam shrimp exporters	49
4. Shrimp exports by locality	49
III. SHRIMP IMPORTS	50
CHAPTER III. PANGASIOUS PRODUCTION AND EXPORTS	51
I. PRODUCTION	51
1. Raw pangasius production	51
2. Price of raw pangasius	51
1. Products	54
2. Import markets	54
2.1. China & Hongkong	56
2.2. The US	58
2.3. EU	62
2.4. Mexico	65
3. Vietnamese pangasius exporters	67
4. Pangasius exports by locality	68
CHAPTER IV. TUNA EXPORTS	68
1. Products	69
2. Import markets	70
2.1. The US	73
2.2. EU	76
2.3. Japan	79
3. Vietnamese tuna exporters	82
4. Tuna exports by locality	83
III. IMPORTS	84
CHAPTER V. EXPORT OF CEPHALOPOD AND OTHER MARINE PRODUCTS	85
I. CEPHALOPOD	85
1. Products	85
2. Import markets	86
2.1. South Korea	87
2.2. Japan	90
2.3. China & Hongkong	93

2.4. EU	95
3. Cephalopod exports by locality	96
4. Cephalopod imports	97
II. MOLLUSK SHELLS	97
1. Products	98
2. Markets	99
3. Clam exports by locality	100
III. CRABS	100
1. Overview	100
2. Import markets	101
IV. SURIMI	102
1. Overview	102
2. Import markets	103
CHAPTER VI. OPPORTUNITIES - CHALLENGES - FORECAST	104
I. OPPORTUNITIES - CHALLENGES	104
1. Opportunities	104
2. Challenges	106
II. FORECAST	108
1. Production	108
2. Exports	108

LIST OF FIGURES

Fig 1. Vietnam seafood products for exports to the US, in QI/2022 (US mil.)	18
Fig 2. Vietnam seafood products for exports to Japan, in QI/2022 (US mil.)	19
Fig 3. Vietnam seafood products for exports to EU, in QI/2022 (US mil.)	20
Fig 4. Vietnam seafood products for exports to China & HK, QI/2022 (US\$ mil.)	21
Fig 5. Vietnam seafood products for exports to South Korea, in QI/2022 (US mil.)	22
Fig 6. Price of white leg shrimp, size 50 pieces/kg, January 2021-Apr 2022 (VND/kg)	31
Fig 7. Price of white leg shrimp, size 80 pieces/kg, January 2021-Apr 2022 (VND/kg)	32
Fig 8. Price of white leg shrimp, size 100 pieces/kg, January 2021-Apr 2022 (VND/kg)	32
Fig 9. Price of raw black tiger shrimp, size 40 pcs/kg, January 2021-Apr 2022 (VND/kg)	33
Fig 10. Structure of shrimp products for exports, QI/2021-2022 (by value)	34
Fig 11. Vietnam shrimp exports to main markets in QI/2022	35
Fig 12. Structure of Vietnam shrimp import markets in QI/2021 - 2022 (by value)	36
Fig 13. Vietnam shrimp exports to the US, 2021 - 2022	38
Fig 14. US's shrimp imports, 2013-2022	40
Fig 15. US's shrimp imports, by suppliers 2013-2022 (1,000 MT)	40
Fig 17. Vietnam shrimp exports to the EU, 2021 - 2022	42
Fig 18. Vietnam shrimp exports to Japan, 2021 - 2022	44
Fig 19. Vietnam shrimp exports to South Korea, 2021 - 2022	47
Fig 20. Vietnam shrimp exports to China - HK, 2021 - 2022	50
Fig 21. Imports of frozen warm water shrimp into China, 2013 - 2022	50
Fig 22. Imports of frozen warm water shrimp into China, by suppliers, 2013 - 2022	51
Fig 23. Top 5 localities exporting shrimp in QI/2022	52
Fig 24. Price of raw pangasius grade 1 in Dong Thap in 2020-22022 (VND/kg)	53
Fig 26. Price of raw pangasius in Mekong Delta, 2020 - 2022, size: 800gr - > 1.2 kg	55

Fig 27. Prices of Vietnam frozen pangasius fillets for export, 2021-2022	55
Fig 28. Average price of frozen pangasius fillets for export, 2021 - 2022, FOB	55
Fig 29. The world's pangasius supplies, 2010-2022	56
Fig 30. Pangasius exports to markets, 2019-2022	58
Fig 31. Vietnam pangasius exports to China & HK, Jan 2021 – Mar 2022	58
Fig 33. Average price of frozen pangasius fillets exported to the US, in Q1/2022	59
Fig 34. Vietnam pangasius exports to the US, Jan 2021 – Mar 2022	62
Fig 35. Import of frozen pangasius fillets (HS 030462) to the US in 2021	63
Fig 36. Average price of frozen pangasius fillets exported to the US, in Q1/2022	63
Fig 37. Average price of frozen pangasius fillets exported to Netherland, in Q1/2022	64
Fig 38. Vietnam pangasius exports to the EU, Jan 2021 – Mar 2022	64
Fig 39. Pangasius export price to EU, 2020-2022	65
Fig 40. EU frozen pangasius imports, 2019-2021	66
Fig 41. Vietnam pangasius exports to Mexico, Jan /2021 - Mar/2022	67
Fig 42. Pangasius export price to Mexico, 2020-2022	68
Fig 43. Average price of frozen pangasius fillets exported to Mexico, in Q1/2022	69
Fig 44. Top 5 pangasius exporters of Vietnam, in Q1/2022	69
Fig 45. Vietnam tuna exports, in Q1/2018-2022 (US\$ mil.)	71
Fig 46. Import markets of Vietnam tuna, Q1/2022-2022	74
Fig 47. Vietnam tuna exports to the US, Jan 2021 – Mar 2022	75
Fig 48. Average export price of tuna with HS code 16041490 of Vietnam to the US, in Q1/2022 (USD/kg)	77
Fig 49. Average export price of tuna with HS code 03048700 from Vietnam to the US, Q1/2022 (USD/kg)	77
Fig 50. Vietnam tuna exports to the EU, Jan 2021 – Mar 2022	79
Fig 51. Average export price of tuna meat/loin HS code 03048700 from Vietnam to Germany (USD/kg)	81
Fig 52. Average export price of tuna meat/loin HS code 03048700 of Vietnam to the Netherlands, 2022 (USD/kg)	81
Fig 53. Vietnam tuna exports to Japan, Jan 2021 – Mar 2022	82
Fig 54. Average export price of tuna with HS code 16041490 from Vietnam to Japan, January 2021 - March 2022	84
Fig 55. Average export price of tuna with HS code 03048700 from Vietnam to Japan, January 2021 - March 2022	84
Fig 56. Top 5 Vietnam tuna exporters, Jan 2021 – Mar 2022	85
Fig 57. Import markets of Vietnam cephalopod in Q1/2021-2022	89
Fig 58. Vietnam cephalopod exports to South Korea, in Q1/2022	91
Fig 59. Vietnam cephalopod exports to Japan, in Q1/2022	94
Fig 60. Vietnam cephalopod exports to China & HK, 2021 –2022	97
Fig 61. Vietnam cephalopod exports to EU, 2021 - 2022	98
Fig 62. Vietnam exports of shell mollusks, Q1/2021-2022	100
Fig 63. Vietnam exports of shell molluscs in Q1/2022, by products	100
Fig 64. Import markets of Vietnam shell mollusks in Q1/2022	101
Fig 65. Vietnam crab exports, in Q1/2018 - 2022	103
Fig 66. Import markets of Vietnam crabs in Q1/2021-2022	104
Fig 67. Vietnam surimi exports in Q1/2022	105
Fig 68. Import markets of Vietnam surimi in Q1/2021-2022	106
Fig 69. Average import price of seafood in some markets, January 2021-February 2022	107

LIST OF TABLES

Table 1. Vietnam seafood exports in 2020- 2021, by main products (US\$ mil.)	10
Table 2. Vietnam seafood exports in Q1/2021 - 2022, by main markets (US\$ mil.)	11
Table 3. Vietnam fishery production in Q1/2022	12
Table 4. Vietnam seafood exports in Q1/2022, by main products (US\$ mil.)	12
Table 5. Vietnam seafood exports in Q1/2021 - 2022, by HS code 03 & 16 (US\$ mil.)	13
Table 6. Top 20 seafood species for exports in Q1/2021 - 2022 (US\$ mil.)	14
Table 7. Top 10 export markets of Vietnam shrimp in Q1/2021 - 2022 (US\$ mil.)	15
Table 8. Top 10 export markets of Vietnam pangasius in Q1/2021 - 2022 (US\$ mil.)	16
Table 9. Top 10 export markets of Vietnam tuna in Q1/2021 - 2022 (US\$ mil.)	16
Table 10. Top 10 export markets of Vietnam cephalopod in Q1/2021 - 2022 (US\$ mil.)	17
Table 11. Top 10 export markets of Vietnam seafood in Q1/2021 - 2022 (US\$ mil.)	18
Table 12. Vietnam seafood exports to main markets, Q1/2022 (US\$ mil.)	18
Table 13. Vietnam main seafood products exported to the US in Q1/2021 – 2022 (US\$ mil.)	19
Table 14. . Vietnam main seafood products exported to Japan in Q1/2021 – 2022 (US\$ mil.)	20
Table 15. Vietnam main seafood products exported to the EU in Q1/2021 – 2022 (US\$ mil.)	22
Table 16. Vietnam main seafood products exported to China & HK in Q1/2021 – 2022 (US\$ mil.)	23
Table 17. Vietnam main seafood products exported to South Korea in Q1/2021 – 2022 (US\$ mil.)	24
Table 18. Vietnam main seafood products exported to UK in Q1/2021 – 2022 (US\$ mil.)	25
Table 19. Vietnam main seafood products exported to Australia in Q1/2021 – 2022 (US\$ mil.)	25
Table 20. Vietnam main seafood products exported to the CPTPP bloc in Q1/2021 – 2022 (US\$ mil.)	26
Table 21. Vietnam main seafood products exported to ASEAN in Q1/2021 – 2022 (US\$ mil.)	26
Table 22. Top 10 seafood exporters in Vietnam Q1/2022, by month (US\$ million)	28

Table 23. Top 100 seafood exporters in Vietnam Q1/2022, by month (US\$ million)	28
Table 24. Top 20 localities of Vietnam leading in seafood export turnover in 2021 (US\$ million)	31
Table 25. Vietnam's seafood imports, in Q1/2021- 2022, by main products (US\$ million)	31
Table 26. Top 20 aquatic species imported into Vietnam, in Q1/2021- 2022 (US\$ million)	31
Table 28. Vietnam shrimp products for exports, in Q1/2022 (US\$ mil.)	35
Table 29. Vietnam shrimp exports to main markets in Q1/2022 (US\$ mil.)	36
Table 30. Top 10 import markets of Vietnam's black tiger shrimp in Q1/2022 (million USD)	37
Table 31. Top 10 import markets of Vietnam's whiteleg shrimp in Q1/2022 (million USD)	38
Table 32. Vietnam shrimp products for exports to the US, in Q1/2022 (US\$ mil.)	39
Table 33. Top 10 shrimp exporters to the US in Q1/2022	39
Table 34. Average price of black tiger shrimp and whiteleg shrimp exported to the US in Q1/2021-2022 (USD/kg)	39
Table 35. Top 10 suppliers shrimp to the US (Source: USDA; Value: US\$ mil.; Volume: tonnes)	41
Table 36. Top 10 shrimp products imported into the US, by HS code, January-Feb 2021-2022	41
Table 37. Vietnam shrimp products for exports to the EU, in Q1/2022 (US\$ mil.)	43
Table 38. Top 10 shrimp exporters to Netherland in Q1/2022	43
Table 39. Average price of black tiger shrimp and whiteleg shrimp exported to Netherland in Q1/2021-2022 (USD/kg)	44
Table 40. Vietnam shrimp products for exports to Japan, in Q1/2022 (US\$ mil.)	45
Table 41. Top 10 shrimp exporters to Japan in Q1/2022	45
Table 42. Average price of black tiger shrimp and whiteleg shrimp exported to Japan in Q1/2021-2022 (USD/kg)	45
Table 43. Shrimp imports to Japan, Jan – Feb 2022 (thousand USD, Source: ITC)	46
Table 44. Shrimp imports into Japan, Jan - Feb 2022, by products (Source: ITC; Value: 1,000 USD)	47
Table 46. Top 10 shrimp exporters to South Korea, in Q1/2022	48
Table 50. Vietnam shrimp products for exports to China & HK, in Q1/2022 (US\$ mil.)	50
Table 51. Top 10 shrimp exporters to China & HK, in Q1/2022	51
Table 52. Average price of black tiger shrimp and whiteleg shrimp exported to China in Q1/2021-2022, by month	51
Table 52. Top Vietnam shrimp exporters, Q1/2022 (US\$ mil.)	53
Table 53. Top 20 shrimp exporting provinces/cities in Q1/2022 (million USD)	54
Table 54. Vietnam's shrimp imports, Q1/2022 (USD)	54
Table 55. Pangasius products for exports in I/2022 (US\$ mil.)	58
Table 57. Vietnam pangasius exports to main markets in Q1/2022 (US\$ mil.)	59
Table 57. Top 10 Vietnam pangasius exporters to China, in Q1/2022	61
Table 58. Top 10 Vietnam pangasius exporters to Hongkong, in Q1/2022	62
Table 59. Importing catfish into the US, Jan /2022 (Source: The US Department of Commerce)	64
Table 60. Top 10 Vietnam pangasius exporters to the US, in Q1/2022	66
Table 61. EU whitefish imports in 2021 (Thousand USD; Source: ITC)	67
Table 62. Top 10 Vietnam pangasius exporters to Netherland, in Q1/2022	68
Table 63. Top 10 Vietnam pangasius exporters to Mexico, in Q1/2022	70
Table 64. Top 5 pangasius exporters of Vietnam, in Q1/2022 (US\$ mil.)	72
Table 65. Top localities exporting pangasius, in Q1/2022 (USD)	72
Table 66. Vietnam's tuna products for exports in Q1/2021 (US\$ million)	73
Table 67. Vietnam tuna exports to main markets in Q1/2022 (US\$ mil.)	74
Table 68. Top 10 import markets of Vietnam's fresh/frozen tuna (HS code 03) in Q1/2022 (US\$ million)	75
Table 69. Top 10 import markets for canned tuna (HS16 code) of Vietnam in Q1/2022 (US\$ million)	75
Table 70. Import markets of Vietnam tuna, Q1/2022	76
Table 71. Vietnam's tuna products exported to the US in Q1/2021 (US\$ million)	78
Table 72. Top 10 Tuna suppliers HS code 030487 to the US, Jan -Feb 2021-2022	79
Table 73. Top 10 Tuna suppliers HS code 160414 to the US, Jan -Feb 2021-2022	80
Table 74. Top 10 Vietnam companies exporting tuna to the US, in Q1/2022	80
Table 75. Vietnam's tuna products exported to the EU, in Q1/2022 (US\$ mil.)	82
Table 76. Top 10 Vietnam companies exporting tuna to EU, in Q1/2022	82
Table 77. Top 10 tuna suppliers to EU, 2019-2021 (1,000 USD)	83
Table 78. Vietnam's tuna products exported to Japan, in Q1/2022 (US\$ mil.)	85
Table 79. Top 10 Vietnam companies exporting tuna to Japan, in Q1/2022	85
Table 80. Top 5 tuna suppliers HS code 160414 to Japan, Jan -Feb 2021 - 2022	86
Table 81. Top 5 tuna exporters of Vietnam, in Q1/2022 (US\$ mil.)	87
Table 82. Vietnam's top 12 cities/provinces exporting tuna, Q1/2022	88
Table 83. Tuna suppliers to Vietnam, Q1/2022 (USD)	88
Table 84. Vietnam cephalopod products for exports in Q1/2022 (million USD)	89
Table 85. Vietnam cephalopod exports to main markets in Q1/2022 (US\$ mil.)	90
Table 86. Top 10 import markets of Vietnam squid and cuttlefish, Q1/2022 (US\$ mil.)	91
Table 87. Top 10 import markets of Vietnam octopus, Q1/2022 (US\$ mil.)	91
Table 88. Vietnam cephalopod products exported to South Korea, in Q1/2022 (US\$ mil.)	92
Table 89. Average prices of cephalopod exported to South Korea, Q1/2022 (USD/kg)	93
Table 90. Top 10 Vietnam cephalopod exporters to South Korea, in Q1/2022	93
Table 91. Top 15 suppliers of cephalopod to South Korea, Jan - Feb 2022 (Source: ITC; Value: 1,000 USD)	93
Table 92. Cephalopod products imports into South Korea, Jan - Feb 2022 (Source: ITC; Value: 1,000 USD)	94
Table 93. Vietnam cephalopod products exported to Japan, in Q1/2022 (US\$ mil.)	95
Table 94. Average prices of cephalopod exported to Japan, Q1/2022 (USD/kg)	96
Table 95. Top 10 Vietnam cephalopod exporters to Japan, in Q1/2022	96

Table 96. Top 15 cephalopod suppliers to Japan, Jan - Feb 2022 (Source: ITC; Value: 1,000 USD)	96
Table 97. Imports of cephalopod into Japan, Jan - Feb 2022 (Source: ITC; Value: 1,000 USD)	97
Table 98. Vietnam cephalopod products exported to China & HK, Q1/2022 (US\$ mil.)	98
Table 99. Average prices of cephalopod exported to China, Q1/2022 (USD/kg)	98
Table 100. Top 10 Vietnam cephalopod exporters to China & HK, in Q1/2022	98
Table 101. Vietnam cephalopod products exported to EU, in Q1/2022 (US\$ mil.)	99
Table 102. Average prices of cephalopod exported to Italy, Q1/2022 (USD/kg)	100
Table 103. Top 10 Vietnam cephalopod exporters to Italy, in Q1/2022	100
Table 104. Top 10 localities exporting cephalopod, Q1/2022 (US\$ mil.)	101
Table 105. Cephalopod imports into Vietnam, Q1/2022 (USD)	101
Table 106. Vietnam shell mollusk exports, by products in Q1/2022 (US\$ thousand)	102
Table 107. Vietnam shell mollusk exports to main markets in Q1/2022 (US\$ thousand)	103
Table 108. Vietnam clam exports to main markets in Q1/2022 (US\$ thousand)	104
Table 109. Top 10 localities exporting clam in Q1/2022 (1,000 USD)	104
Table 110. Vietnam crab exports to main markets in Q1/2022 (US\$ mil.)	105
Table 111. Vietnam surimi exports to main markets in Q1/2022 (US\$ mil.)	107
Table 112. Seafood import into some markets, first 2 months of 2022 (million USD)	109
Table 113. Forecast of seafood exports in the second quarter of 2022, by product (million USD)	112