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INFOFISH Trade News
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The newsletter is supplemented by:

- ◆ **European Price Report**
(monthly)
- ◆ **Globefish Seafood Highlights**
(quarterly)
- ◆ **INFOFISH International**
(bi-monthly)

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BULLETIN:

- **Global:** Tariff hikes slow growth outlook for US, Japan, and other advanced economies.
- **Pacific:** FSM tightens Port State Measures to tackle IUU fishing.
- **Asia:** US tariffs reshape Asia's shrimp trade.
- **Thailand:** Skipjack prices remain stable despite reduced supply and tariff challenges.
- **China:** Wholesale trade maintains stability in fresh salmon prices.

FRESH FISH:

- **Japan:** Fishery imports steady at 2.12M MT; fresh salmon down 39% since 2020 but values firm on strong demand.

FROZEN FISH:

- Frozen fish meat imports rise 10% in Japan; fish fillets up 1.46%.

CHILLED AND FROZEN TUNA:

- Global tuna trade slipped to 1.25 million MT in H1 2025 (down from 1.30 million MT), with frozen fillet demand steady but fresh imports weaker.

SHRIMP:

- International shrimp trade increased in January-June 2025 due to spontaneous high imports in the USA.

CANNED FISH:

- Global imports of canned and processed tuna increased during January-June 2025

FACT SHEET:

- **MALAYSIA: FISHERY TRADE**

All indicative prices refer mainly to the period: **15/8/2025 - 24/8/2025**.



GLOBAL

SLOWER GROWTH AMID TARIFFS AND UNCERTAINTY

Growth in the major advanced economies in 2025 and 2026 is now projected to be lower than anticipated in *Asian Development Outlook July 2025*, primarily due to the impact of higher tariffs. In the United States (US), tariff hikes are expected to dampen trade activity, increase production costs, and weigh on household consumption amid ongoing uncertainty over the possible resumption of reciprocal trade measures. The decline in US-bound exports is already affecting Japan's economy. In aggregate, the growth forecast for major advanced economies is revised down from 1.6% to 1.4% in 2025 and from 1.6% to 1.5% in 2026

PACIFIC

FSM TIGHTENS PORT STATE MEASURES TO TACKLE IUU FISHING

The Federated States of Micronesia has enhanced its port state measures, using advanced risk analysis and data-driven tools to detect and block illegal fishing before it reaches its ports. The move strengthens compliance and supports international efforts for sustainable fisheries management in the WCPO.

<https://www.franciscoblaha.info/blog/2025/8/18/fsm-enhances-port-state-measures-to-strengthen-compliance>

ASIA

US TARIFFS RESHAPE ASIA'S SHRIMP TRADE

The U.S.'s reciprocal tariffs on many shrimp-exporting countries are realigning global supply chains and forcing major Asian producers, including Vietnam, Indonesia, and India, to rethink their strategies. India, the largest shrimp supplier to the U.S., is facing a major blow from steep new tariffs, including a 25% reciprocal tariff that could rise to 50% under a new U.S. executive order. Combined with existing anti-dumping and countervailing duties, the total tariff burden may reach 58.26% despite India's efforts to offset losses through trade deals with other nations like the U.K.

THAILAND

SKIPJACK PRICES HOLD FIRM AMID SLOW FISHING AND TARIFF PRESSURES

Skipjack tuna prices for August delivery in Bangkok stayed stable in July/August, with packers resisting upward moves. Market players expect prices to remain steady, with only limited scope for increases in September. The end of the WCPO FAD ban has seen poor fishing and slow reefer arrivals, while deals in Bangkok remain constrained following recent U.S. tariff actions on Thailand.

CHINA

WHOLESALE MARKETS MAINTAIN STABLE FRESH SALMON PRICES

Atlantic salmon prices in China's major wholesale markets remained stable in week 35, with overall profitability hovering at break-even. A Guangzhou-based dealer noted losses of CNY 4/kg on Norwegian fish versus a CNY 2/kg profit on Faroese supply. With the new school term beginning in September, demand dynamics are expected to shift as students return to campus.

COLD STORAGE HOLDINGS IN JAPAN, (in MT)						
		<u>31.5.2025</u>	<u>30.4.2025</u>	<u>31.5.2024</u>	<u>% change month ago</u>	<u>% change year ago</u>
I	Total Fishery Product	800 052	773 234	792 465	+3.47	+0.96
	1. Total frozen products	672 561	650 510	664 177	+3.39	+1.26
	2. Total salted products	48 961	46 266	50 155	+5.83	-2.38
II	Frozen products by species					
1	Tuna	56 685	54 242	55 356	+4.50	+2.40
	1.1 Albacore	4 741	3 054	3 263	+55.24	+45.30
	1.2 Bigeye	10 405	9 772	10 183	+6.48	+2.18
	1.3 Yellowfin	11 635	10 388	12 022	+12.00	-3.22
	1.4 Bluefin	4 356	4 308	4 271	+1.11	+1.99
	1.5 S. Bluefin	2 059	2 440	1 826	-15.61	+12.76
	1.6 Skipjack	19 979	20 761	20 580	-3.77	-2.92
	1.7 Other tuna	3 510	3 519	3 211	-0.26	+9.31
2	Swordfish	2 142	2 024	1 518	+5.83	+41.11
3	Salmon	67 235	70 269	72 580	-4.32	-7.36
4	Trout	8 935	8 578	14 149	+4.16	-36.85
5	Sardines	62 819	59 221	51 790	+6.08	+21.30
6	Horse mackerel	17 178	15 380	17 428	+11.69	-1.43
7	Chub mackerel	70 640	70 930	73 446	-0.41	-3.82
8	Flatfish	7 843	7 932	8 187	-1.12	-4.20
9	Shrimp & prawn	48 888	48 539	44 493	+0.72	+9.88
10	Cuttlefish & squid	32 591	32 461	36 035	+0.40	-9.56
11	Octopus	12 927	11 755	10 858	+9.97	+19.06
12	Surimi (pollack)	31 890	30 008	34 406	+6.27	-7.31
13	Other surimi	20 371	19 318	17 693	+5.45	+15.14

SYMBOLS							
+	marks higher prices since the last report;	CFR	Cost and Freight	HOSO	Head-on, Shell-on	PUD	Peeled, Undeveined
-	marks lower prices since the last report;	DDP	Delivery Duty Paid	IQF	Individually Quick Frozen	PVN/ KKD	Poovalan-karikkady
=	marks updated but unchanged prices	FOB	Freight on Board	IWP	Individual Poly-wrapped	SKJ	Skipjack Tuna
Dash (-)	No available price	G&G	Gilled & Gutted	P&D	Peeled & Deveined	Sknl	Skinless
Bold print	New price	HLSO	Headless shell-on	PBO	Pin-bone Out		
Bnls	Boneless	H&G	Headed & Gutted	PTO	Peeled & Deveined, Tail on		

CURRENCY RATES					
Exchange rates per 1 US\$ as of 15/8/2025					
JPY (Japan)	147.08	NZ\$ (New Zealand)	1.68		
INR (India)	87.57	CNY (China)	7.17		
NOK (Norway)	10.20	IDR (Indonesia)	16 129.70		
CA\$ (Canada)	1.38	AU\$ (Australia)	1.53		
MYR (Malaysia)	4.21	EUR (EU)	0.86		
SG\$ (Singapore)	1.28	THB (Thailand)	32.38		
HK\$ (Hong Kong)	7.84	PHP (Philippines)	56.81		
GB£ (U Kingdom)	0.74	RUB (Russia)	79.65		

LIVE, FRESH AND CHILLED FISH

INFOFISH Trade News, No. 8/2025

28 August 2025

Japan

Japan's total fishery imports reached 2.12 million MT in 2024, up 0.58% from the previous year. Within this, imports of live, fresh, and chilled fish fell 5.7% to 33 258 MT, with fresh/chilled salmon accounting for 10 571 MT (+1.8%).

Fresh/chilled salmon imports have dropped sharply over the past five years - from 17 370 MT in 2020 to 10 571 MT in 2024 (-39%) - yet import values remained stable at ¥17–19 billion, reflecting firm consumer demand and higher unit prices. Norway continues to dominate supply despite lower volumes, while Australia and Canada remain steady secondary sources. Pacific salmon imports are minimal, mainly from New Zealand. The Japanese salmon market is clearly shifting toward lower volumes but higher value, driven by strong demand for sushi/sashimi-grade fish. However, rising competition from China and the Republic of Korea for Norwegian supply highlights Japan's ongoing dependence on a few key origins and the need to diversify sourcing strategies.

Japan: Imports of Fresh/Chilled Salmon, 2020-2024, in MT					
Atlantic Salmon (HS 030214000)					
Source	2020	2021	2022	2023	2024
Norway	13 117	13 380	7 301	7 418	6 905
Australia	1 637	2 192	1 589	1 679	1 737
Canada	1 680	1 413	2 191	587	1 472
Chile	24	11	162	361	112
Iceland	-	19	9	16	65
UK	493	370	60	88	54
Faroe Islands	112	87	33	5	0
Total Atlantic *	17 063	17 477	11 345	10 154	10 345
Value (¥ million)	16 701	18 570	17 054	17 037	16 984
Pacific Salmon (HS 030213019)					
Source	2020	2021	2022	2023	2024
New Zealand	260	474	350	210	205
Canada	44	44	28	23	22
Total Pacific Salmon *	307	518	378	233	227
Value (¥ million)	457	722	661	491	541
Total Fresh/Chilled Salmon	17 370	17 993	11 725	10 388	10 571
Value (¥ million)	17 159	19 291	17 715	17 527	17 525

* Including others

Source: Japan Customs

Malaysia:

Aquatic production in Malaysia has held steady at 1.8 - 1.9 million MT, with aquaculture growth offsetting declines in capture fisheries.

In the fresh, chilled, and live fish trade, imports stayed high in 2024 at 107 000 MT, while exports rebounded to 31 669 MT. By the first half of 2025, imports were down 11% compared to 2021, while exports were up nearly 30%, signaling stronger competitiveness (refer fact sheet page #23 for Malaysia's annual fishery trade).

INFOFISH Trade News, No. 8/2025

28 August 2025

LIVE, FRESH, CHILLED FISH & SEAFOOD

1US\$ = MYR 4.21

1US\$ = HK\$ 7.84

FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated	PRICE REFERENCE & MARKET AREA	ORIGIN
FRESH/CHILLED				
SHRIMP				
<i>White Vannamei</i> ,	Frozen thawed, chilled head-on 30-40 pc/kg 60-70 pc/kg	MYR 34.99 + 8.31 MYR 25.99 - 6.17	Retail trade, Kuala Lumpur, Malaysia	Imported, SE Asia
Black tiger	Fresh/Chilled, head-on 30-40 pc/kg	-		
BLUE SWIMMING CRAB	Fresh, chilled	-		
SQUID	Fresh, chilled	MYR 41.99 + 9.97		

INFOFISH Trade News, No. 8/2025 28 August 2025		LIVE, FRESH, CHILLED FISH & SEAFOOD			1US\$ = MYR 4.21 1US\$ = HK\$ 7.84	
FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN	
ATLANTIC SALMON & TROUT	Atlantic salmon, fillets, fresh	2-3 lb/pc	5.90-6.40/lb	Wholesale NE, USA	Europe	
		3-4 lb/pc	6.00-6.50/lb			
	Coho, steaks-cut, processed from frozen/thawed salmon	2-3 lb/pc	5.10-5.25/lb	Wholesale Miami, USA	Chile	
		3-4 lb/pc	5.20-5.35/lb			
		4-5 lb/pc	5.30-5.45/lb			
TROUT	Salmon head, 600 gm/pc	MYR 47.90	+	Retail trade, Kuala Lumpur, Malaysia	Chile	
		MYR 30.00	=		Norway/ Chile	
					Norway	
SWORDFISH	H&G, chilled (air-flown)	50-99 lb/pc 100 lb/pc and up	5.95-6.25 6.25-6.75	Wholesale East Coast, USA	South America	
GROUPER <i>Epinephelus spp</i>	Whole, medium		9.53	Wholesale Rio de Janeiro	Brazil	
MUD GROUPER	Whole, fresh	HK\$ 90.75-140.25	=	11.58-17.89	Wholesale Hong Kong	Hong Kong
BROWN SPOTTED GROUPER <i>E. coioides</i>	Whole, fresh/chilled	MYR 23.88	-	5.67	Wholesale Penang, Malaysia	Thailand
RED GROUPER (Pacific)	Whole, gutted, chilled		6.95-7.45/lb	fob Southeast, USA	Central America	
YELLOW CROAKER	Whole, fresh	HK\$ 36.00-115.50	+	4.59-14.73	Wholesale Hong Kong	Southeast Asia/ China
MANGROVE SNAPPER	Whole, fresh/chilled	MYR 33.60	+	7.98	Wholesale Penang,	Thailand/ Indonesia
LANE SNAPPER <i>Lutjanus guttatus</i>	Eviscerated, chilled	1-2 lb/pc 2-4 lb/pc	6.25-6.50/lb 6.25-6.50/lb	fob Southeast, USA	South America	
YELLOWTAIL SNAPPER <i>Lutjanus argentiventris</i>	Eviscerated, chilled	1-2 lb/pc 2-4 lb/pc	5.50-5.95/lb 6.00-6.25/lb			
SILK SNAPPER	Eviscerated, chilled	1-2 lb/pc 2-4 lb/pc	6.50-6.85/lb 5.95-6.25/lb			
SEA PERCH <i>Lateolabrax japonicas</i>	Whole, fresh	HK\$ 66.00-102.30	=	8.42-13.05	Wholesale Hong Kong	China/ Hong Kong
THREADFIN BREAM	Whole, fresh/chilled, small	MYR 12.56	+	2.98	Wholesale Kuala Lumpur,	Malaysia
DOLPHIN FISH (<i>mahi mahi</i>)	Fillets		4.81-5.07	+	Wholesale Mexico	Mexico
	H&G, chilled (air-flown)	10-15 lb/pc 15 lb/pc and up	-	-	fob Southeast, USA	South America
WHITE POMFRET	Whole, Medium fresh/chilled	MYR 35.14	-	8.35	Wholesale Kuala Lumpur, Malaysia	Thailand & Indonesia
	Whole, fresh/chilled	HK\$ 90.00-168.00	=	11.48-21.43	Wholesale Hong Kong	Local & Imported
BLACK POMFRET	Whole, fresh/chilled	MYR 23.52	+	5.59	Wholesale Penang, Malaysia	Thailand
		HK\$ 28.00-92.40	=	3.57-11.79	Wholesale Hong Kong	Hong Kong/ China
CHINESE POMFRET	Whole, fresh	HK\$ 660.00-792.00	-	84.18-101.02		
BOMBAY DUCK	Whole, fresh	HK\$ 20.00-82.50	=	2.55-10.52		
SPANISH MACKEREL	Whole, fresh/chilled, 3-4 kg/pc	MYR 50.00-60.00	=	11.88-14.25	Retail trade, Kuala Lumpur, Malaysia	India/Indonesia
	Steak-cut, fresh/chilled	MYR 48.90	-	11.62		South and Southeast Asia
INDIAN MACKEREL	Frozen, thawed	MYR 16.90	-	4.01		

INFOFISH Trade News, No. 8/2025 28 August 2025		LIVE, FRESH, CHILLED FISH & SEAFOOD			1US\$ = MYR 4.21 1US\$ = HK\$ 7.84		
FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN		
INDIAN MACKEREL	Whole, fresh/chilled	MYR 12.42 + 2.95		Wholesale Penang, Malaysia	Thailand/Indonesia		
SCAD MACKEREL	Whole, fresh	HK\$ 36.00-115.50 = 4.59-14.73		Wholesale Hong Kong	Hong Kong/China		
		MYR 18.00 - 4.28		Retail trade, Kuala Lumpur Malaysia	India/Pakistan/Malaysia		
FISH HEAD	Fish head, chilled, all types	MYR 25.00 = 5.94			India/Pakistan		
RED SNAPPERS	Frozen thawed, sliced	MYR 51.90 12.33			South and Southeast Asia (India, Malaysia/Indonesia/Thailand)		
THREADFIN	Fresh/Chilled	MYR 35.00 8.31		Malaysia	Malaysia		
CROAKER	Whole, fresh	-			Malaysia		
HARDTAIL SCAD	Whole, fresh	MYR 8.74 + 2.08		Wholesale Penang, Malaysia	Thailand		
HAIR TAIL (Ribbon Fish)	Whole, fresh	HK\$ 30.00-85.80 + 3.83-10.94		Wholesale Hong Kong	Southeast Asia		
TILAPIA	Fillet, chilled, boneless, skinless	3-5 oz/pc 4.35-4.60/lb + 5-7 oz/pc 4.35-4.60/lb + 7-9 oz/pc 4.35-4.60/lb +		Wholesale Miami, USA	Latin America		
WHITE POMFRET (small)	Frozen, frozen- thawed, 50-60 gm/pc	MYR 10.00 = 2.38		Retail trade, Kuala Lumpur, Malaysia	Malaysia		
GOLDEN POMFRET (farmed)	Whole, whole, thawed/chilled	MYR 28.50 - 6.77			China		
BLACK POMFRET		MYR 20.90 + 4.96					
SARDINE		MYR 14.99 - 3.56					
ASIAN SEABASS (farmed)	Whole, fresh/chilled, 400/600 gm/pc	MYR 14.99 + 3.56					
BLACK TILAPIA (farmed)	Whole, fresh, 200-400 gm/pc	MYR 7.90 - 1.88		South and Southeast Asia (India, Malaysia/Indonesia/Thailand)			
PINK / RED TILAPIA (farmed)	Whole, fresh, 300-500 gm/pc	MYR 16.99 + 4.04					
PANGASIUS (farmed)	Whole, fresh	MYR 7.99 - 1.90					
CHANNEL CATFISH	Fillet, fresh	3-5 oz/pc 5.50-5.90/lb = 5-7 oz/pc 5.60-5.90/lb =		Wholesale NY, USA	USA		
CONGER EEL	Whole, fresh	HK\$ 39.00-105.60 = 4.97-13.47		Wholesale Hong Kong	Hong Kong/China		
LIVE							
BROWN SPOTTED GROUPER	Live	HK\$ 120-314 + 15.31-40.05		Wholesale, Hong Kong	Southeast Asia		
GREEN GROUPER	Live	HK\$ 116-260 = 14.80-33.16					
LEOPARD CORAL GROUPER	Live	HK\$ 230-660 + 29.34-84.18					
BROWN MARBLED GROUPER	Live	HK\$ 190-413 + 24.23-52.68					
RED GROUPER	Live	HK\$ 1485-1980 = 189.41-252.55					
MANGROVE SNAPPER	Live	HK\$ 59-130 = 7.53-16.58					
MALABAR RED SNAPPER	Live	HK\$ 52-130 + 6.63-16.58					
RUSELL SNAPPER	Live	HK\$ 105-248 + 13.39-31.63					
POMPANO	Live	HK\$ 50-100 + 6.38-12.76					

FROZEN FISH & FILLETS

INFOFISH Trade News, No. 8/2025

28 August 2025

JAPAN

Japan remains one of the world's largest seafood consumers, with steady demand for products like frozen fish meat (used in surimi, *kamaboko*, fish cakes, etc.). During the first half of the year, frozen fish meat imports increased by 10.17% compared to the previous year, while frozen fish fillet showed a marginal increase of 1.46% at 286 323 MT compared to the same period in 2024. Almost all main products under this category recorded increases, except for frozen salmon and trout fillets and flat fish fillets, which decreased slightly (- 1% each) respectively. Current lifestyle trends are shifting toward convenience foods and ready-to-eat meals, driving stronger demand for processed seafood that relies on frozen fish meat as a key raw material. In Japan, import volumes typically rise when processing plants increase production ahead of holiday periods or export seasons.

Species/Products	Japan: Imports of Frozen Fish Fillets and Fish Meat, by species (MT)				
	January – June		Annual		
	2025	2024	2023	2024	2023
Fish Meat (unspecified)	60 525	54 938	57 836	114 888	113 590
Fish Fillet (unspecified)	47 141	46 462	42 242	94 241	90 872
Alaska pollock fillets frozen	5 327	4 738	4 522	11 019	9 716
Tuna fillet, frozen	37 805	34 815	28 154	64 301	49 416
Salmon & Trout fillets, frozen	29 832	30 343	30 328	58 092	53 361
Flat Fish fillets, frozen	4 869	5 201	5 241	11 287	10 798
TOTAL (including others)	286 323	282 489	232 291	549 344	567 916

Source: Japan Customs

INFOFISH Trade News, No. 8/2025

28 August 2025

FROZEN FISH & FILLETS

1US\$ = MYR 4.21

FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN
ATLANTIC SALMON	Farmed, portions 4 oz/pc 7.10-7.35/lb +	6 oz/pc 8 oz/pc	7.85-8.10/lb 7.95-8.20/lb	fob Miami, USA	Chile
	Farmed, fillet, PBO 2/3 lbs/pc 5.20-5.40/lb =	3/4 lbs/pc 4/5 lbs/pc	5.30-5.50/lb 5.40-5.60/lb		
COD	Tails, Bnls/Sknls, IQF	3-6 oz/pc	6.20-6.45/lb	Ex-warehouse NY, USA	China
	Loins, Bnls/Sknls, IQF	3-8 oz/pc	7.50-7.75/lb		
	Fillet, IQF 4/8 oz/pc 6.50-6.65/lb +	8/16 oz/pc 16/32 oz/pc	6.50-6.65/lb 6.50-6.65/lb		
HADDOCK	Fillet, IQF, Bnls/Sknls 6/8 oz/pc 6.05-6.20/lb + 8/10 oz/pc 6.05-6.20/lb +	10/12 oz/pc 12 oz/pc up	6.05-6.20/lb 6.05-6.20/lb	Ex-warehouse NY, USA	China
FLOUNDER	Fillet, IQF, 10 lb pack 3 oz/pc 3.50-3.70/lb = 4 oz/pc 3.60-3.80/lb =	5 oz/pc 6 oz/pc	3.85-4.05/lb 3.90-4.10/lb		
ALASKA POLLACK	Fillet, 10 lbs pack, boneless, IQF 2/4 oz/pc 2.15-2.35/lb =	4/6 oz/pc 6/8 oz/pc	2.35-2.50/lb 2.35-2.50/lb		
CHILEAN SEABASS	Portions 6 oz/pc 24.00-24.50/lb =	8 oz/pc 10 oz/pc	24.00-24.50/lb 24.00-24.50/lb	Chile	Chile
	Whole, skin-on, H&G, boxed	6/8 oz/pc 8/10 oz/pc	17.75-18.00/lb 17.50-18.00/lb		

INFOFISH Trade News, No. 8/2025 28 August 2025		FROZEN FISH & FILLETS			IUS\$ = MYR 4.21
FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN
DOLPHIN FISH (<i>mahi-mahi</i>)	Portions, boneless, skinless 4 oz/pc 6.60-6.85/lb +	6 oz/pc 8 oz/pc	8.25-8.75/lb + 8.75-9.00/lb +	Ex-warehouse, New York, USA	Peru
OCEAN PERCH	Fillet, Skin-on/Boneless	4/6 pc/oz 6/8 pc/oz	3.20-3.45/lb = 3.20-3.45/lb =	Ex-warehouse NY, USA	China
SABA MACKEREL	Whole, frozen, 430 gm/pc	MYR 25.00	= 5.94	Retail trade, Kuala Lumpur, Malaysia	Norway
	Frozen fillet	MYR 45.00	= 10.69		
HORSE MACKEREL	Whole, frozen, thawed	MYR 11.00	= 2.61		
SARDINE	Whole, frozen	MYR 17.00	= 4.04		
TILAPIA (farmed)	Frozen, fillet	MYR 25.00	= 5.94	China	China
	Fillet	8/10 kg	4.75 =		
	Fillet, IQF (no moisture added) 3/5 oz/pc 3.20-3.40/lb -	5/7 oz/pc 7/9 oz/pc	3.15-3.45/lb - 3.20-3.55/lb -	Ex-warehouse, New York, USA	China
	Whole, gutted, IQF, 10 kg pack, 7-10% compensated glaze	300/500 pc/kg 500/700 pc/kg 700/900 pc/kg	2.20 2.30 2.35	cfr Mexico	India
CARP	Whole, round, IQF, 20 kg pack, frozen	800/1000 gm/pc 1000/1500 gm/pc	1.45 1.50	cfr Vietnam	
LEATHER JACKET	Cleaned, H&G, tail less, IQF, 10 kg pack 200/300 gm/pc	500/700 gm/pc 700/1000 gm/pc	5.70 5.70		
	300/500 gm/pc	1000/1500 gm/pc	5.70		
PANGASIUS CATFISH (farmed)	Fillet, skinless, IQF, 20% glaze	170/220 gm/pc	2.80 +	cfr Belgium	Vietnam
	Fillet, IQF		3.80 +	cfr USA	
	Striped (<i>Swai</i>), fillets, skinless, boneless	3/5 oz/pc 5/7 oz/pc 9/11 oz/pc	1.95-2.15/lb + 1.90-2.10/lb = 1.90-2.10/lb =	Ex-warehouse, New York, USA	China
	Steaks, frozen, 20-30 g/pc	MYR 16.00	= 3.80	Retail trade, Kuala Lumpur, Malaysia	Vietnam
	Skewer, frozen	MYR 45.00	= 10.69		
	Eggs, IQF, 1 x 8/2 x 9 kg, 100% net weight	Small Medium Large	9.00 = 10.00 = 11.00 =	cfr United Kingdom	India
CHANNEL CATFISH <i>Ictalurus sp</i>	Fillets, skinless, boneless	3/5 oz/pc 5/7 oz/pc	3.80-3.95/lb = 3.80-4.00/lb =	Ex-warehouse, New York, USA	China
		3/5 oz/pc 5/7 oz/pc	5.40-5.85/lb = 5.65-5.95/lb =		USA

CHILLED & FROZEN TUNA

INFOFISH Trade News, No. 8/2025

28 August 2025

Global trade in fresh and frozen tuna weakened marginally during the first half of 2025, totalling 1.25 million MT, compared with 1.30 million MT during the same period in 2024.

Demand for fresh tuna remained weak, with imports falling by 11.6% year-on-year to 38 543 MT during January–June 2025. Among the top five markets, imports increased in the USA, Spain and Portugal, but declined in Thailand and Japan. For the whole frozen tuna imports which are mostly used for reprocessing canned and other varieties of ready to eat products, the top importers were Thailand, Japan, Viet Nam, Philippines and Cote d'Ivoire. Demand for frozen tuna fillets remained firm across the markets, with Japan, USA, Spain, the Republic of Korea and Portugal as the leading importers.

Tuna products	January-June					% change 2025/2024
	2021	2022	2023	2024	2025	
Tuna -whole fresh	42 638	47 031	44 594	43 547	38 543	-11.6
Tuna - whole frozen	1 116 353	1 089 619	931 718	1 161 924	1 107 253	-5.17
Tuna - frozen fillets	88 593	105 989	84 033	96 245	108 305	+12.5
Total tuna	1 247 584	1 242 639	1 060 345	1 301 716	1 254 101	-3.84

Source: Global Trade Tracker

Descriptions	January-June				
	2021	2022	2023	2024	2025
frozen skipjack	578 881	512 906	484 588	679 407	521 185
frozen yellowfin	240 987	284 211	212 822	239 928	300 631
frozen fillets of tuna	88 593	105 989	84 033	96 245	108 305
frozen bigeye tunas	70 193	60 057	59 816	46 076	63 977
frozen tunas, others	77 675	81 078	45 736	58 092	62 189
frozen albacore	57 069	43 219	43 190	40 506	48 266
frozen southern bluefin	924	749	278	988	1 629
frozen bluefin atlantic and pacific	2030	1409	1254	682	1 070
Total tuna, frozen	1 116 353	1 089 619	931 718	1 161 924	1 107 253

Source: Global Trade Tracker

Japan

Overall, demand for tuna in the sashimi trade was steady during June-July this year, supported by visiting tourists from the Asia Far East, even as local Japanese consumers traditionally avoid eating raw fish (*sashimi*) during the summer months.

At Tokyo's Toyosu Market, auction prices for fresh and frozen *sashimi*-grade tuna were stable, reflecting stronger demand from the restaurant and catering sectors. Imports of large-sized Atlantic bluefin from North America (from USA and Canada, weighing 150-250kg/fish) increased, while imports of air-flown Southern bluefin tuna from New Zealand and Australia also increased in the auction market.

Local demand for *sashimi* tuna improved during 'Obon' the traditional festival celebrated in mid-August 13-15, when families gather to honor their ancestors. During this period the Toyosu auction market remained closed.

USA

Overall demand for non-canned tuna improved during the summer months, driven by increased out-of-home dining. Imports of frozen tuna fillets rose to 22 254 MT in the first half of the year, up 29% compared with the same period in 2024. However, seafood marketers in the USA have cautioned consumers about potential increases for high value tuna following the implementation of high tariffs, effective from August.

China

The surge in domestic tourism in China, has boosted business opportunities in the restaurant sector, particularly for the *sashimi* trade. During the first half of 2025, fresh tuna imports in China increased by 35% at 693 MT, with higher volumes of both Atlantic and Southern Bluefin tuna. The recent lifting of restrictions on seafood imports from Japan is expected to further support high-value bluefin supplies, catering to the country's 125 000 Japanese restaurants in the country.

Raw Materials for Canning and Other Uses

As reported in the previous issue, tuna packers in Thailand are increasingly substituting whole frozen tuna with semi-processed cooked loins to produce end-products. During January-June 2025, imports of cooked loins in Thailand reached 39 479 MT, up 16% year-on-year, with China, Indonesia and Viet Nam the main suppliers. In contrast, overall imports of whole frozen tuna were lower by 25 % during this period driven by a sharp decline in frozen skipjack imports while, frozen yellowfin and albacore imports recorded growth.

THAILAND: Half-yearly imports of cooked frozen loins, in MT						% Change 2025/2024	
Sources	January-June						
	2021	2022	2023	2024	2025		
China	10 123	21 927	16 326	23 618	26 358	+13.04	
Indonesia	7 050	9 820	6 868	8 542	8 467	-1.17	
Viet Nam	2 305	2 102	3 383	1 821	3 998	+119.54	
Solomon Islands	0	0	0	0	383	-	
Total including others	19 799	34 037	27 346	34 031	39 479	+14.70	

Source: Global Trade Tracker

Europe

Semi-processed tuna raw materials remain popular among the tuna canners in Europe. During January-June 2025, imports of cooked frozen tuna loins reached 119 276MT, up 17% year-on-year. The top importers in ranking were Spain, Italy, Portugal and France; the main suppliers were China, Indonesia, Ecuador, Philippines, Viet Nam and Papua New Guinea. Imports also increased from Solomon Islands, Guatemala, and Colombia but declined from El Salvador during this period.

Outlook

Tuna catches in the WCPO (Western and Central Pacific Ocean) are likely to remain seasonally low until September due to the ongoing FAD fishing closure. As a result, raw material prices in international trade will continue to be influenced by the evolving supply–demand balance.

In Japan, the *sashimi* tuna trade traditionally remains sluggish in September before improving in October with the anticipated rise in foreign tourists expected to visit the country.

In the US, imports of high-value tuna are likely to slow down in the coming months, as some supply sources become subject to high tariffs.

In the European Union, canned tuna imports may slow down in the coming months, following heavy procurement during the first half of the year.

While imports of semi-processed and processed tuna recorded a 12.82% increase during January-June 2025. This stock build up may lead to some softening in demand during the third quarter of 2025.

FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE In ¥/kg	PRICE REFERENCE & MARKET AREA	ORIGIN
FRESH AND FROZEN TUNA: SASHIMI AND NON-SASHIMI GRADE				
BLUEFIN <i>Thunnus thynnus</i>	Fresh, whole/dressed	¥ 3024-7884 + 20560-53603/mt	Auction Toyosu Market, Tokyo, Japan	Imported
		¥ 2160-6480 + 14686-44058/mt		Aomori, Japan
		¥ 3240-4320 + 22029-29372/mt		Japan
	G&G, frozen	¥ 2484-5076 + 16889-34512/mt		Imported
SOUTHERN BLUEFIN <i>Thunnus maccoyii</i>	Fresh, whole/dressed	¥ 2484-7344 16889-49932/mt	Imported	
	G&G, frozen	¥756-4536 - 5140-30840/mt		
BIGEYE <i>Thunnus obesus</i>	Fresh, whole/dressed	-	Imported	
	G&G, frozen	¥864-2700 + 5874-18357/mt		
YELLOWFIN <i>Thunnus albacares</i>	Fresh, whole/dressed	-	Tokyo, Japan	
	G&G, frozen	¥972-1188 + 6609-8077/mt		Imported
	Loins, (cleaned), IQF, CO treated, vacuum packed	5-8 lb/pc 4.95-5.15/lb + 8 lb/pc and up 4.95-5.15/lb +	Wholesale New York, USA	Asia
	Steaks (CO treated), frozen	4 oz 4.30-4.45/lb + 6 oz 4.85-5.20/lb + 8 oz 4.95-5.35/lb +		
FROZEN TUNA FOR CANNING AND FURTHER PROCESSING				
YELLOWFIN <i>Thunnus albacares</i>	Whole/Round, 10 kg & up/pc	¥ 326 - 2216/mt	Auction Yaizu Market, Japan	(Deepsea P/S)
	Whole/Round,	2560/mt +	fob Seychelles	Indian Ocean
	Whole Round 20 kg & up/pc	2500/mt	cfr Iran	India
	Pre-cooked tuna loins & double cleaned	8800/mt =	cfr Europe	India
SKIPJACK <i>Euthynus pelamis</i>	Whole/Round , 1.8 kg/pc and up	¥ 223 - 1516/mt	Auction Yaizu Market, Japan	S W Pacific (Purse seiner)
	Whole round 2 kg & up/pc	1500/mt	cfr Vietnam	India
	Whole	1550/mt +	cfr Bangkok, Thailand	Western Pacific
	Round	2500/mt +	fob Seychelles	Indian Ocean
		1600/mt =	Ex-vessel Ecuador	Eastern Pacific
ALBACORE <i>Thunnus alalunga</i>	Precooked loins	6500/mt =	cfr Europe	India
	Round, 10 kg/pc and up	¥ 312 + 2121/mt	Wholesale Yaizu, Japan	Pacific Ocean

SHRIMP

INFOFISH Trade News, No 8/2025

28 August 2025

The US authorities imposed ultra-high tariff on goods from certain countries effective from 1st August 2025. In view of this development, US shrimp importers accelerated procurement earlier in the year, particularly from Asian sources, which resulted in relatively large harvests of farmed shrimp in South and South East Asia during May and June. As of June 2025, cumulative U.S. shrimp imports increased by 15% year-on-year to 414 501 MT; this volume is 54 000 MT higher than the same period in 2024.

Since July/August shrimp farmers in India reported a drastic drop in ex-farm sales (down by almost 90 percent in August) due to weakening demand from their top market, the United States.

In Ecuador, the 2nd leading producer of farmed shrimp after China, production is seasonally low as the winter season sets in. The industry association in Ecuador reported some firming up in prices due to the low supply of farmed shrimp.

In China, domestic demand has been good during the summer months, benefitting local farms which supply head-on fresh shrimp through greenhouse aquaculture. Consequently, imports in the world's largest market during January–June 2025 were below last year's levels. While Ecuador's production between January–March 2025 held steady compared with 2024, its exports to both China and the United States fell during that period.

International trade

Imports

Global shrimp trade during the first half of 2025 was characterized by reduced imports in China, the world's largest market, alongside higher imports in the USA, Japan, European Union, the Republic of Korea and other emerging markets.

Meanwhile, global shrimp trade has been increasingly unpredictable due to evolving tariff policies, mainly with regard to the United States and particularly affecting products of Asian origin. Effective from 27 August 2025, U.S imports of shrimp are subject to tariffs ranging from 15% (Ecuador) to 50% (India).

During January–June 2025, cumulative shrimp imports into the United States reached 414 500 MT, 15% increase year-on-year, valued at USD 3.60 billion. Nearly 50 % (205 304 MT) of these imports comprised semi-processed raw frozen peeled, shrimp supplied by India, Ecuador, Indonesia and Viet Nam. Processed shrimp accounted for 22.7 % (94 109 MT) of total imports, making the United States and China the top importers of shrimp in value and volume, respectively. In general, more than 85 % of the seafood consumed in the United States is imported from countries like India, Ecuador, Viet Nam, and Thailand.

Europe

During the first half of 2025, shrimp imports in the European Union were marginally higher (2.80%) at 403 350 MT, year-on-year; which could be credited to increased consumption during the summer holiday season. Imports increased in Spain, France, Germany, Portugal and Greece but declined in the Netherlands, Italy, Denmark and Poland.

Asia

Japan, the second-largest shrimp market in Asia, after China bought more shrimp during January-June 2025 in anticipation of the summer demand associated with the surge in foreign tourist arrivals. During January-June, 2025, Japan imported nearly 100 000 MT of shrimp, marking its highest mid-year volume in five years. The top suppliers that benefited from this surge in demand were Viet Nam, India, Indonesia, Thailand and Ecuador. During this period, the Japan National Tourism Organization reported a total number of 21.5 million foreign visitors.

WORLD: Estimated Imports of Shrimp, January - June 2021-2025, in MT					
Destinations	2021	2022	2023	2024	2025
	January-June				
China	294 278	369 780	544 598	483 174	469 596
United States	405 034	441 059	361 393	360 436	414 500
Japan	94 393	96 555	88 506	92 792	98 987
Spain	69 496	80 576	72 492	81 670	86 496
France	60 841	61 677	57 268	55 618	67 374
Korea (Rep. of)	46 881	50 398	44 904	49 871	50 355
Viet-Nam	26 308	30 731	33 633	27 192	43 056
Germany	32 932	36 599	31 982	34 199	39 289
Netherlands	44 632	45 361	37 700	39 003	37 676
United Kingdom	34 633	38 952	33 461	35 416	36 731
Italy	31 218	41 538	39 212	39 349	34 894
Canada	26 044	33 797	25 302	31 983	34 843
Denmark	48 851	54 468	44 310	44 636	33 689
World total including others	1 617 627	1 751 539	1 798 563	1 769 994	1 829 767

Source: Global Trade Tracker

Exports

Strong import requirements in the United States induced exports from Ecuador, India, and Indonesia; exports, however, declined from Viet Nam, Thailand and Argentina. Intra-regional trade flow in South East Asia and the Far East was higher than the previous years as imports increased in Japan, the Republic of Korea for local consumption. Viet Nam and Thailand increased shrimp imports for export processing of value-added products during this period.

The supply trend from Ecuador to China, its top export market rebounded strongly after a previous downturn. Exports from Ecuador to the United States, Spain, France and Italy also increased during this period. Meanwhile, India, the world's second largest shrimp exporter, exported 162 267 MT of shrimp to USA, which was 24% higher than last year's same period. At the same time, China reversed its position in the international trade, exporting more value-added shrimp and buying less for domestic consumption.

WORLD: Exports of Shrimp, January-June 2025, in MT					
Exporters	2021	2022	2023	2024	2025
	January-June				
Ecuador	389 954	521 750	609 839	619 963	720 665
India	329 858	334 741	326 199	337 983	379 335
Viet-Nam	148 143	169 524	128 969	146 799	144 605
Indonesia	121 446	122 859	110 375	98 506	112 976
China	82 971	68 720	69 015	79 476	94 306
Thailand	73 260	72 892	64 003	65 717	59 838
Argentina	59 498	40 610	57 957	48 233	42 631
Denmark	47 482	55 011	45 736	49 175	40 027
Netherlands	41 905	43 402	40 425	44 371	38 603
Belgium (Eurostat)	18 818	21 077	27 592	19 913	23 167
Spain	23 123	21 470	23 874	26 344	21 292
Canada	22 148	23 258	26 437	19 929	19 365
Malaysia	22 527	17 888	18 447	15 197	17 408
Honduras	17 183	15 141	18 890	14 995	15 928
Peru	17 855	23 571	19 894	13 760	12 884
Norway	2 749	3 471	5 715	11306	12 110
World total including others	1 586 181	1 709 384	1 770 211	1 769 251	1 872 274

Source: Global Trade Tracker

INFOFISH Trade News, No 8/2025

28 August 2025

SHRIMP PRICES

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
FROZEN						
<i>Vannamei</i> , HOSO (count/kg)	20/30 30/40 40/50	3.60/lb + 3.35/lb + 3.15/lb +	50/60 60/70 70/80	3.00/lb + 2.90/lb + 2.75/lb +	Ex-warehouse New York, USA	Latin America
<i>Vannamei</i> , HOSO, semi -IQF	60 pcs			4.80 +	cfr South Korea	Vietnam
<i>Vannamei</i> , HOSO, easy peel, IQF 10 x 2lbs bag with header, 35% glaze	8/12 16/20 21/25	3.25 2.55 2.35	26/30 31/40	2.15 1.95	cfr Germany	India
Black tiger, HOSO, IQF, 10 x 1 kg, 20% glaze	8/12 13/15	9.20 8.15	16/20 21/30	7.30 6.50		India
Black tiger, HOSO, semi IQF, 1 kg duplex pack, 80% net weight	8/12 13/15	8.75 8.25	16/20	7.75		India
Black tiger, HLSO, easy peel, IQF 10 x 1 kg, poly bag with header, treated, 25% glaze	8/12 13/15	11.10 10.10	16/20 21/25	8.90 7.70	cfr United Kingdom	India
<i>Vannamei</i> , HLSO, treated, 100% net weight, block frozen	16/20 21/25 26/30	10.15 8.30 7.60	31/40 41/50	7.20 6.70	cfr Dominican Republic	India
<i>Vannamei</i> , HLSO, IQF, G1 Quality 6 x 2 kg pack, 100% net weight	111/130 131/150	4.60 + 4.40 +	151/200	4.20 +	cfr China	India

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
<i>Vannamei</i> , HLSO, IQF, G2 Quality, 6 x 2 kg pack, 100% net weight	41/50 5.60 + 51/60 5.10 + 61/70 4.80 + 71/90 4.70 +	91/110 111/130 131/150 151/200	4.50 + 4.30 + 4.10 + 3.80 +	cfr China	India	
Sea-caught shrimp, PUD, IQF, 10 kg pack, <i>non-treated</i> , 100% net weight	71/90 7.45 91/120 7.15	100/200 200/300	6.25 5.85	cfr Europe	India	
Sea-caught shrimp, PUD, IQF, 10 kg pack, <i>treated with non-phosphate</i> , 100% net weight	71/90 6.45 91/120 5.50	100/200 200/300	5.30 4.70	cfr Europe	India	
<i>Vannamei</i> , P&D, tail off, IQF, 10 kg, 30% glaze, treated with non-phosphate, frozen	8/12 8.90 13/15 7.90	16/20	6.80	cfr United Kingdom	India	
<i>Vannamei</i> , P&D, IQF, 10 x 1 kg, 35% glaze, frozen	8/12 6.15 + 11/15 6.05 + 16/20 5.45 + 21/25 5.10 +	26/30 31/40 41/50 51/60	4.75 + 4.45 + 4.25 + 4.15 +	cfr Middle East	India	
<i>Vannamei</i> , P&D, IQF, 10 x 1 lb, Printed DOY & zip bag, STPP treated, 100% net weight	31/40 3.80	41/50	3.65	DDP New York	India	
Black tiger, P&D, tail off, IQF 10 kg poly bag with header, 25% glaze, block frozen	8/12 11.00 13/15 10.00	16/20 21/25	8.80 7.60	cfr United Kingdom	India	
White (wild) HLSO, block frozen	Un/12 12.40/lb = Un/15 10.10/lb = 16/20 6.90/lb = 21/25 6.25/lb +	26/30 31/35 36/40 41/50	5.60/lb + 4.95/lb = 4.60/lb = 4.40/lb +	Ex-warehouse New York, USA	Gulf of Mexico	
	Un/10 12.85/lb + Un/12 11.20/lb + Un/15 9.00/lb +	16/20 21/25	6.40/lb + 4.55/lb +	Ex-warehouse New York, USA	Latin America	
	13/15 5.90/lb = 16/20 5.05/lb + 21/25 4.45/lb + 26/30 4.35/lb + 31/35 4.10/lb + 36/40 3.95/lb +	41/50 51/60 61/70 71/90 91/110	3.90/lb + 3.60/lb + 3.30/lb + 3.20/lb + 3.20/lb +	Ex-warehouse New York, USA	Latin America	
	8/12 8.45/lb + 16/20 5.35/lb + 21/25 4.90/lb + 26/30 4.55/lb +	31/35 36/40 41/50	4.50/lb + 4.25/lb + 4.15/lb +	Ex-warehouse New York, USA	Asia	
	8/12 7.40/lb + 16/20 5.30/lb + 21/25 4.90/lb + 26/30 4.75/lb +	31/40 41/50 51/60	4.60/lb + 4.55/lb + 4.20/lb +	Ex-warehouse New York, USA	Asia	
	2/4 16.35/lb + 4/6 15.55/lb +	6/8 8/12	13.00/lb + 9.45/lb +	Ex-warehouse New York, USA	Asia	
Black tiger, HLSO, block frozen	4/6 12.20 = 6/8 11.10 = 8/12 10.10 = 13/15 9.10 = 16/20 8.30 = 21/25 7.60 =	31/40 41/50 51/60 61/70 71/90 91/120	6.70 = 6.50 + 5.90 + 5.50 + 5.30 + 4.90 +	cfr Japan	Vietnam	
Black tiger, HLSO, block frozen	4/6 19.25/lb + 6/8 15.60/lb + 8/12 9.35/lb + 13/15 8.25/lb +	16/20 21/25 26/30 31/40	7.50/lb + 6.85/lb + 6.40/lb + 5.85/lb +	Ex-warehouse New York, USA	Asia	

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
Black tiger, PTO	6/8 16.35 + 8/12 10.10 + 13/15 8.55 +	16/20 7.55 + 21/25 6.35 + 26/30 5.75 +			Ex-warehouse New York, USA	Asia
<i>Vannamei</i> , PTO	8/12 8.90 + 13/15 6.90 + 16/20 5.85 + 21/25 5.35 +	26/30 5.10 + 31/40 4.90 + 41/50 4.65 +			Ex-warehouse New York, USA	Asia
<i>Vannamei</i> , PTO	13/15 7.05 + 16/20 5.95 + 21/25 5.45 + 26/30 5.20 +	31/35 5.20 + 31/40 5.00 + 41/50 4.75 +			Ex-warehouse New York, USA	Ecuador
Black tiger, Peeled and deveined (PD)	21/25 6.00/lb 26/30 5.65/lb	31/40 5.25/lb			Ex-warehouse New York, USA	Asia
<i>Vannamei</i> , PD	16/20 5.95/lb + 21/25 5.45/lb + 26/30 5.20/lb + 31/35 5.10/lb +	31/40 4.95/lb + 41/50 4.70/lb + 51/60 4.55/lb + 61/70 4.55/lb +			Ex-warehouse New York, USA	Ecuador
	16/20 5.90/lb + 21/25 5.35/lb + 26/30 5.15/lb + 31/40 4.90/lb + 41/50 4.60/lb +	51/60 4.50/lb + 61/70 4.40/lb + 71/90 4.30/lb + 91/110 4.30/lb + 100/200 4.05/lb +			Ex-warehouse New York, USA	Asia
BLANCHED AND COOKED						
Black tiger, PTO, cooked	13/15 11.55/lb + 16/20 8.60/lb + 21/25 7.55/lb +	26/30 6.30/lb + 31/40 5.70/lb + 41/50 5.55/lb +			Ex-warehouse, New York, USA	Asia
	13/15 14.60 + 16/20 13.50 +	21/25 12.50 +		cfr USA		Vietnam
Sea-caught shrimp, HLSO, blanched, IQF, 10 x 1 kg pack, 25% glaze, Treated with non-phosphate	16/20 6.60 21/25 6.30 26/30 6.10	31/40 5.60 41/50 5.25 51/60 5.15		cfr Italy		India
<i>Vannamei</i> , PUD - blanched, IQF, 20 x 1 lb, printed bag, 28% glaze, frozen	80/120 1.85/lb - 100/200 1.75/lb -	200/300 1.65/lb - 300/500 1.50/lb -		cfr Dominican Republic		India
<i>Vannamei</i> , PTO, cooked, IQF, 10 x 1 lb, Plain bag with header, STPP treated, 100% net weight	21/25 4.20/lb 26/30 4.05/lb 31/40 3.75/lb	51/60 3.45/lb 71/90 3.30/lb		DDP Los Angelos, USA		India
Sea-caught shrimp, PUD, blanched, IQF, 10 kg pack, 20% glaze, frozen	20/40 5.70 40/60 5.20 60/80 4.60 80/120 4.30	100/200 4.00 200/300 3.70 300/500 3.60		cfr Italy		India
Sea-caught shrimp (pink/brown), PUD, blanched, IQF, 10 kg pack, 20% glaze, frozen	10/20 7.80 20/40 6.65	40/60 6.20		cfr Italy		India
KKD shrimp, PUD, blanched, IQF, 10 kg pack, 20% glaze, frozen	80/120 4.90 100/200 4.50 +	200/300 4.10 + 300/500 3.80 +		cfr Europe		India
PUD Sea-caught KKD and deep-sea shrimp, blanched, IQF, 10 kg pack, 20% glaze, frozen	Broken 3.00			cfr Italy		India
Deep-sea shrimp, PUD, cooked, IQF, 10 kg pack, 100% net weight, treated with non-phosphate	100/200 5.35 200/300 5.05	300/500 4.75		cfr Russia		India
<i>Vannamei</i> , P&D, tail off, cooked, IQF, 10 x 1 lb, STPP treated, 100% net weight	31/40 4.40/lb 41/50 4.15/lb	51/60 4.00/lb		DDP New York, USA		India

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
<i>Vannamei</i> , P&D, tail off, cooked, IQF, 5x2 lb, STPP treated, 100% net weight	31/40 41/50	4.35/lb 4.10/lb	51/60 61/70	3.95/lb 3.85/lb	DDP New York, USA	India
<i>Vannamei</i> , PTO, blanched, IQF, 1lb, printed bag, 35% glaze, frozen	8/12 16/20 21/25	3.15/lb 2.50/lb 2.30/lb	26/30 31/40	2.20/lb 2.10/lb	cfr Dominican Republic	India
<i>Vannamei</i> , PTO, cooked, IQF, 10 x 1 lb, Printed DOY & zip bag, STPP treated, 100% net weight	31/40	4.50/lb	41/50	4.35/lb	DDP New York, USA	India
<i>Vannamei</i> , PTO, cooked	13/15 16/20 21/25 26/30 31/40	9.60/lb + 7.55/lb + 6.75/lb + 6.25/lb + 5.85/lb +	41/50 51/60 61/70 71/90	5.60/lb + 5.55/lb + 4.80/lb + 4.60/lb +	Ex-warehouse, New York, USA	Asia
<i>Vannamei</i> , PD, cooked, IQF	31/40 41/50 51/60 61/70	5.65/lb + 5.55/lb + 5.35/lb + 5.30/lb +	71/90 91/110 110/150 100/200	5.15/lb + 4.90/lb + 4.75/lb + 4.70/lb =	Ex-warehouse, New York, USA	Asia
NOBASHI (PTO)						
<i>NOBASHI</i> (PTO), IQF Black tiger, tray pack	13/15 16/20 21/25	9.70 = 8.90 = 8.20 =	26/30 31/40	7.70 = 7.30 =	cfr Japan	Vietnam
<i>NOBASHI</i> raw breaded, 50% shrimp	26/30 31/40	8.80 + 7.80 +	41/50	7.20 +		
<i>SUSHI ebi</i> , black tiger, cooked, tray pack	21/25	12.40 +	26/30	11.40 +		
<i>NOBASHI</i> <i>Vannamei</i> , IQF	31/40 41/50	7.10 + 6.30 +	51/60 61/70	5.70 + 5.20 +		

Vietnam's crab exports hit a 10-year high, reaching US\$173 million in H1, 2025, up 38% year-on-year, led by strong demand from China, the EU, and Australia. According to the industry association -VASEP, full-year exports could surpass US\$350 million, this is despite of the sector's continuous challenges, related to quarantine procedures, farming code compliance, and pricing pressures.

Meanwhile in the US, the blue swimming crab market remains steady to firm, with only adequate supplies to meet moderate to active demand, despite continued upward pressure from tariffs (19% Indonesia, 20% Vietnam, 50% India), tightening inventories, and raw material shortages.

1US\$ = HK\$ 7.84

SPECIES TRADE NAMES	GRADING and INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
AMERICAN LOBSTER, live	1 lb/pc 9.75-10.25/lb = 1 1/8 lb/pc 9.75-10.25/lb =	1 1/4 lb/pc 9.95-10.50/lb = 1 1/2 lb/pc 10.50-10.85/lb +			New York, USA	USA
RED CRAB, live		HK\$ 160-825 +		20.41-105.23		
THREE-SPOTTED CRAB, live		HK\$ 55-165 +		7.02-21.05		
ROCK LOBSTER (<i>Panulirus sp.</i>), live		HK\$ 363-420 -		46.30-5357		Southeast Asia / Australia
ROCK/SPINY LOBSTER (warm water tails), frozen	5 oz/pc 7 oz/pc 8 oz/pc 10/12 oz/pc	24.25-24.75/lb + 23.00-23.50/lb + 22.75-23.25/lb + 17.00-17.50/lb =	12/14 oz/pc 14/16 oz/pc 16/20 oz/pc 20/24 oz/pc	17.00-17.50/lb = 17.00-17.50/lb = 17.00-17.50/lb = 17.00-17.50/lb =	Ex-warehouse NY, USA	Brazil
	5 oz/pc 6 oz/pc 7 oz/pc 8 oz/pc	22.25-22.75/lb = 21.50-22.25/lb + 21.00-21.50/lb = 21.00-21.50/lb =	10/12 oz/pc 12/14 oz/pc 14/16 oz/pc 16/20 oz/pc	17.00-17.50/lb = 17.00-17.50/lb = 17.00-17.50/lb = 17.00-17.50/lb =		Caribbean
KING CRAB, red (legs and claws), frozen	6/9 pc/oz 9/12 pc/oz	77.00-80.00/lb + 72.00-75.00/lb =	12/14 pc/oz 14/17 pc/oz	66.00-69.00/lb + 62.00-65.00/lb =	Ex-Warehouse West Coast, USA	Norway

FROZEN CEPHALOPODS AND MOLLUSCS

SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated	PRICE REFERENCE & MARKET AREA	ORIGIN	
CUTTLEFISH <i>Sepia sp</i>	Whole, cleaned, IQF, 10 x 1 kg block, 30% glaze U/1 pc/kg	1/2 pc/kg 5.55 2/4 pc/kg 5.55	cfr Italy	Kochi, India	
	Whole, cleaned, IQF, 10 kg block, 30% glaze	U/1 pc/kg 2.75/lb 1/2 pc/kg 2.75/lb	cfr Italy		
	Whole, cleaned, IQF, 10 kg block, 15% glaze	20/40 pc/kg 2.20/lb 40/60 pc/kg 2.10/lb	cfr USA		
BABY CUTTLEFISH	Whole cleaned, IQF, 10 kg block, IQF, 20% glaze	40/60 pc/kg 4.40 60 pc/kg and up 4.00	cfr Italy	Gujarat, India	
SQUID <i>Loligo sp</i>	Whole, cleaned, IQF, semi needle, 10 x 1 kg poly bag with header, 20% glaze	U/3 pc/kg 5.35 - 3/6 pc/kg 5.10 - 6/10 pc/kg 4.30 -	cfr Italy	Kochi, India	
	Whole, cleaned, IQF, 6 x 2 kg, block, 25% glaze	U/5 pc/kg 7.00 U/10 pc/kg 6.40			
	Tubes	5/8 inch 4.25-4.45/lb =	Ex-warehouse NY, USA		
	Rings & Tentacles	5/8 inch -			
	Tubes & Tentacles	3-5 inch 3.95-4.10/lb = 5-8 inch 4.60-4.70/lb =			
	Raw cut rings (R) & tentacles (T), IQF, skin less, 10 kg pack, 20% glaze, treated with E330/E331 and salt	40 inch & up (R) 5.60 60 inch & up (R) 5.50 60 inch & up (T) 4.50	cfr Italy	Kochi, India	
BABY SQUID	Whole, round, 10 x 1 kg poly bag, with header, 25% glaze	80 pc/kg up 3.00	cfr Spain	Gujarat India	
BABY OCTOPUS	Whole, cleaned, semi-IQF, semi-block, 12 x 2 lbs, flower shape, 10% glaze, 90% net weight	5/15 pc/kg 2.70/lb	cfr Houston, USA	Kochi, India	
	Whole, cleaned, 12 x 2 lbs, semi-block net weight	16/25 pc/kg 2.75/lb 26/40 pc/kg 2.75/lb 40/60 pc/kg 2.75/lb	cfr Los Angelos, USA		
	Cleaned, IQF, 10 kg poly bag with header, 25% glaze 10/20 pc/kg 3.95	20/40 pc/kg 3.95 40/60 pc/kg 3.95 60 pc/kg and up 3.95	cfr Italy		
	Whole, cleaned, flower shaped 12 x 2 lbs, 30% glaze, 70% net weight (buyers brand) 5/15 pc/kg 2.20/lb	16/20 pc/kg 2.20/lb 26/40 pc/kg 2.20/lb 40/60 pc/kg 2.20/lb	cfr USA	Tuticorin India	
OCTOPUS (Pulpo)	2/4 oz/pc 4/6 oz/pc	5.35-5.60/lb + 6.20-6.45/lb +	6.95-7.20/lb +		
CLAMS (Chocolata)	Mixed sizes, large		3.52 +	Wholesale Mexico	
OYSTERS	In bags with water without shell	2 nd quality bag 30 to 35 kg	5.55 +		

INFOFISH Trade News, No. 8/2025
28 August 2025

PROCESSED AND SEMI-PROCESSED PRODUCTS

SPECIES	PRODUCT FORM	GRADING & INDICATIVE PRICES in US\$/kg if not otherwise stated			PRICE REFERENCE & MARKET AREA	ORIGIN	
SQUID <i>Loligo sp</i>	Blanched, rings, IQF, 10 kg pack, 10% glaze Non treated	60 pc/kg and up		5.70 =	cfr France	Kochi, India	
CATFISH <i>Ictalurus sp</i>	Frozen, breaded fillet	5.00-5.45/lb =		Steaks 3.55-3.80/lb =	Wholesale, New York, USA	USA	
	Breaded fingers	5.00-5.45/lb =		Nugget 1.75-2.00/lb =			
FISH	Nuggets				Wholesale Mexico	Mexico	
	Steaks, breaded						
MUSSELS	Whole shell, cooked, Medium				Ex-warehouse NY, USA	New Zealand	
SURF CLAMS <i>Paphia nudulata</i>	Meat, boiled	200/300 pc/kg 300/500 pc/kg 500/800 pc/kg	3.80 = 3.70 = 3.60 =	800/1000 pc/kg 1000/1500 pc/kg	3.40 = 3.30 +	cfr Japan	Vietnam
WHITE CLAM <i>Meritrix iyata</i>	Whole, round, boiled, IQF, 1 kg/10/carton			60/80 pc/kg	2.40 +	cfr Portugal	Vietnam

Species Trade Names	Product Form & Grading	INDICATIVE PRICE in US\$/kg if not otherwise stated	PRICE REFERENCE & MARKET AREA	ORIGIN	
Salmon	Smoked-Dried, 120 Gm, Tray-Pack	MYR 166.00 = 39.43	Retail trade, Kuala Lumpur, Malaysia	SE Asia	
Indian Mackerel	Salted/Dried, 200 Gm Retail Pack	MYR 25.00 = 5.94			
Croaker	Salted, Dried	MYR 55.00 = 13.06			
Bombay Duck	Whole/Dried, Grade A, Retail Pack (120 Gm/Pack)	MYR 80.00 = 19.00		Southeast Asia	
Asian Anchovy (Ikan Bilis)	Blanched, Whole, Salted & Dried Split, Boneless	MYR 65.00 = 15.44 MYR 100.00 = 23.75		Malaysia/Indonesia	
Baby Anchovy (Silverfish)	Blanched, Salted/Dried Dried, Stained-Fried, Ready-To-Eat, 250 Gm, Tray-Pack	MYR 60.00 = 14.25 MYR 41.00 = 9.74		Southeast Asia	
Horse Mackerel	Salted, Dried	1.17 -	Wholesale Mexico	Mexico	
Grouper	Salted, Dried	5.23 -			
Salmon	Smoked	12.97 -			
Rainbow Trout	Smoked	4.81 =			
Tuna	Smoked	7.47 -			
Tilapia	Salted, Dried	4.91 =			
Snook	Salted, Dried	8.54-8.81 -			
Ray Fin	Dried, Salted	1.82 =			
Cod	Salted, Dried	13.51 =		Campeche Mexico	
Dried Shrimp (Acetes)	Whole, Blanched/Dried, Grade A 200 Gm/Retail Pack Peeled, Cooked/Dried	MYR 50.00 = 11.88 MYR 100.00 = 23.75	Retail trade, Kuala Lumpur, Malaysia	Southeast Asia	
Shrimp	Raw Dried/Salted-Whole Small Medium Large	5.23-5.77 - 7.47-8.01 - 10.09-10.57 -	Wholesale Mexico	Mexico	
	Raw Dried/Salted-Head Off Small Medium Large	6.14-6.67 - 8.38-8.97 - 10.95-11.48 -			
	Cooked Dried/Salted-Whole Small Medium Large	5.87-6.41 - 8.54-9.08 - 11.21-11.64 -			
Fishmeal	Peru Fishmeal Prices Per Mt				
	Destination	Type	Terms	Product Shipment Date	
	China	SD 68/100/500 SD 67/120/500 SD 66/120/500 SD 65/100/500 SD 65/120/1000 SD 65/200 SD 64/120	FOB/Callao FOB/Callao FOB/Callao FOB/Callao FOB/Callao FOB/Callao FOB/Callao	1740 1670 1590 1540 1490 1340 1420	August August August August August August August
Fish Oil	Peru Fish Oil Prices Per Mt				
	Destination	Type	Terms	Product Shipment Date	
	-	-	-	-	

CANNED FISH

INFOFISH Trade News, No. 8/2025

28 August 2025

Global canned tuna trade- January-June 2025

Global imports of canned and processed tuna continued to show positive growth in the first half of 2025 compared with the same period in 2024. Imports into the world's largest single market the USA, increased by 16.15% year-on-year. Thailand remained the leading supplier, accounting for 48.82% of the total, followed by Viet Nam, Ecuador, Mexico and Indonesia.

Cumulative imports of processed and canned tuna increased in the European Union Common Markets with a 13.35% rise in supply at 399 737 MT in comparison with the same period in 2024; nearly 30% (119 276 MT) of these volumes was the semi-processed cooked loins bought by the European tuna canners in Spain, Italy, France and Portugal.

Outside the EU, United Kingdom imports increased to 51 710 MT. In the Middle East, imports of canned tuna increased in key markets such as Libya, Egypt, Saudi Arabia, Kuwait and Oman, but declined in the UAE, Iraq and Yemen. Meanwhile, major markets in Southeast Asia and the Far East namely Japan, Australia, Malaysia, New Zealand recorded increased imports of premium canned tuna products.

Importers	January-June					% Change 2025/2024
	2021	2022	2023	2024	2025	
United States	110 125	118 920	112 161	109 227	127 941	+16.51
Spain	73 801	89 394	81 574	84 283	107 836	+27.38
Italy	67 435	74 420	75 280	69 394	62 992	10.14
Germany	44 074	44 368	39 952	42 403	52 789	+23.80
France	44 837	48 225	50 698	47 382	51 978	+8.52
United Kingdom	45 512	47 890	43 317	44 363	51 710	+15.90
Netherlands	51 681	27 273	32 265	32 655	41 392	28.12
Thailand	19 801	34 037	27 346	34 032	39 478	+14.70
Japan	32 680	32 675	35 162	33 571	33 706	=
Australia	21 841	23 847	19 274	22 547	22 823	=
Portugal	12 162	15 318	17 334	15 990	22 061	+46.66
Colombia	19 950	18 076	14 752	16 404	19 346	+18.75
Canada	18 105	16 435	15 230	17 450	18 484	+5.88
Chile	11 841	11 945	13 900	14 526	18 465	+28.57
Peru	8 130	4 722	9 365	8 542	13 172	+62.50
Egypt	37 168	45 444	5 435	8 479	12 881	+50.00
Argentina	10 329	10 802	8 630	9 378	12 169	+33.33
World total including others	786 001	802 791	737 398	757 847	862 626	+13.87

Source: Global Trade Tracker

PRODUCT & FORM	GRADING	INDICATIVE PRICE in US\$/Carton if not otherwise stated	PRICE REFERENCE & MARKET AREA	ORIGIN
Tuna salad in mayonnaise	150 gm pack	MYR 6.25/ can = 1.48/can	Retail trade, Kuala Lumpur, Malaysia	Thailand
TUNA in Sunflower oil chunk	150 gm	MYR 7.70/can = 1.83/can		
TUNA in mayo, sandwich delight	150 gm	MYR 6.00/can = 1.43/can		
TUNA in extra virgin olive oil solid	150 gm	MYR 6.50/can = 1.54/can		
TUNA with lemon and pepper	150 gm	MYR 6.50/can = 1.54/can		
TUNA in MEXICAN STYLE chunk	150 gm/can	MYR 6.50/can = 1.54/can		
TUNA garlic & Herbs	150 gm/can	MYR 6.50/can = 1.54/can		
Chili TUNA	160 gm/can	MYR 7.00/can = 1.66/can		
TUNA in curry sauce	28 x 185 gm	MYR 6.15/can = 1.46/can		
TUNA in Olive oil	115g/pack	MYR 24.00/can = 5.70/can		Portugal
TUNA in oil solid	48 x 170 gm, easy open	39.24 -	cfr Aguas Calientes	Mexico
TUNA in water solid	24 x 170 gm	39.24 -	Wholesale, Tijuana Mexico	
TUNA in olive oil solid	24 x 170 gm	41.12 -		
SARDINE in tomato sauce	Whole box can, 24 x 245 gm	37.37 -	cfr Aguas Calientes	Mexico
SARDINE in extra virgin olive oil	120 gm, oval	MYR 6.90/can = 1.64/can	Retail trade, Kuala Lumpur, Malaysia	Malaysia
SARDINE in Olive oil	75 gm/pack	MYR 23.90/can = 5.68/can		Portugal
SARDINE in Curry	425 gm, tall	MYR 9.15/can = 2.17/can		Malaysia
SARDINE in oil <i>Clupea pilchardus</i>	24 x 425 gm	49.92 -	cfr Zacatecas Mexico	Mexico
MACKEREL fillets in extra virgin olive oil (North-sea mackerel)	125 gm, oval	MYR 9.50/can = 2.26/can	Retail trade, Kuala Lumpur, Malaysia	Scotland, UK
MACKEREL, fried, in chili sauce	155 gm, tall	MYR 5.10/can = 1.21/can		Malaysia
MACKEREL, Spice in Olive oil	125 gm/pack	MYR 34.00/can = 8.08/can		Portugal

MALAYSIA: FISHERY TRADE

Imports by Main Product Groups (HS 03, 1604 & 1605)								
Products	2021		2022		2023		2024	
	MT	US\$ 1000	MT	US\$ 1000	MT	USD \$1000	MT	USD \$1000
HS 03: Live, fresh, frozen, dried fishery products, fish, crustaceans, molluscs and other aquatic invertebrates	465 591	1 111 839	495 835	1 324 537	467 977	1 229 499	451 577	1 121 705
HS 1604: Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs	40 104	114 020	42 034	112 671	40 048	92 0901	41 178	98 222
HS 1605: Prepared/preserved crustaceans, molluscs and other aquatic invertebrates, prepared or preserved (excl. smoked)	13 384	42 273	36 295	63 345	41 232	55 895	41 635	65 380
Total including others	519 079	1 268 132	574 164	1 500 553	549 257	1 377 484	534 390	1 285 307

Imports of Fish and Fishery Products, by Country of Origin (US\$ 1000)					
Origin	2020	2021	2022	2023	2024
China (People's Republic of)	246 220	316 894	346 775	289 390	298 537
Thailand	115 107	157 352	161 878	171 074	176 910
Indonesia	175 679	162 367	173 697	173 301	174 482
Viet-Nam	118 882	126 898	156 570	124 194	119 372
India	49 450	62 361	127 794	119 489	82 823
Total (including others)	1 079 975	1 268 132	1 500 553	1 377 484	1 285 307

Exports by Main Product Groups (HS 03, 1604 & 1605)								
Products	2021		2022		2023		2024	
	MT	US\$ 1000						
HS 03: Live, fresh, frozen, dried fishery products, fish, crustaceans, molluscs and other aquatic invertebrates	266 801	680 283	202 979	660 414	189 892	651 882	197 575	567 204
HS 1604: Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs	40 833	156 836	40 089	162 017	42 198	163 445	43 178	169 137
HS 1605: Prepared/preserved crustaceans, molluscs and other aquatic invertebrates, prepared or preserved (excl. smoked)	6 990	38 213	7 087	50 025	7 054	50 823	7 257	48 258
Total including others	314 624	875 332	250 155	872 455	239 144	866 150	248 010	784 599

Exports of Fish and Fishery Products to Major Markets (US\$ 1000)					
Origin	2020	2021	2022	2023	2024
China (People's Republic of)	243 206	231 545	211 704	245 841	200 648
Singapore	135 831	169 497	165 526	160 905	163 396
Thailand	54 753	57 288	38 310	40 306	50 421
Hong Kong	34 374	56 076	55 871	53 492	42 810
Taiwan	42 886	41 952	57 378	45 799	41 168
Total (including others)	793 907	875 332	872 455	866 150	784 599

BUSINESS OPPORTUNITIES

EVENTS

SINGAPORE

SEAFOOD EXPO ASIA

10-12 September 2025

Singapore

Website: <https://www.seafoodexpo.com/asia>

FIJI

9TH PACIFIC TUNA FORUM (PTF 2025)

14-15 October 2025

Nadi, Fiji

Website: <https://ptf.infofish.org/>

CHINA

CHINA FISHERIES & SEAFOOD EXPO (CFSE)

29-31 October 2025

Qingdao, China

Website: <https://chinaseafoodexpo.com/>

THAILAND

5th WORLD TILAPIA TRADE AND TECHNICAL CONFERENCE & EXHIBITION 2025

(TILAPIA 2025)

3-5 November 2025

Bangkok, Thailand

Website: <https://v4.infofish.org/>

SOUTH KOREA

BUSAN INTERNATIONAL SEAFOOD & FISHERIES EXPO 2025

5-7 November 2025

Busan, South Korea

Website: <https://bisfe.com/eng/>

INDIA

WORLD AQUACULTURE 2025

10-13 November 2025

Hyderabad, India

Website: <https://was.org/meeting/code/WAI2025>

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"Innovation, Integration and Profitability in Tilapia Aquaculture: Modernisation for a New Era"

5th INFOFISH WORLD TILAPIA TRADE AND TECHNICAL CONFERENCE & EXHIBITION 2025

In collaboration with

13th International Symposium on Tilapia in Aquaculture (ISTA13)



3 - 5 NOVEMBER 2025
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Thailand

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