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**INFOFISH**

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◆ **European Price Report**  
(monthly)

◆ **Globefish Seafood Highlights**  
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◆ **INFOFISH International**  
(bi-monthly)

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## BULLETIN:

- Global: Alternative feeds; key to safeguarding premium aquaculture growth.
- USA: Tariff extension offers stability to frozen haddock and sole imports from China.
- Europe/UK/Norway: Cod quotas set for 2026 after zero-catch advice overruled.
- China: Fishmeal prices stabilize in China after a month of gains.

## FRESH FISH:

- EU Fresh/Chilled catfish fillet imports edge lower in 2025 as supplier mix diversifies

## FROZEN FISH:

- EU frozen fish imports fall sharply in 2025 as volumes contract across key species

## CHILLED AND FROZEN TUNA:

- Global demand for higher value non-canned tuna remained stable throughout 2025 but weakened for frozen tuna to produce end products.

## SHRIMP:

- Shrimp trade worldwide was balanced in 2025 with reasonable demand and enough supply of farmed shrimp. US imports in September crossed last year's level despite high tariff.

## CANNED FISH:

- International trade of canned and processed tuna was record high during January-September 2025 at 1.316 million MT, valued at US\$ 7.133 billion.

## FACT SHEET:

- Global Fish Economy - *FAO Globefish Highlights No, 2/2025*

All **indicative** prices refer mainly to the period: **15/12/2025 - 22/12/2025**.



**GLOBAL      STUDY: PREMIUM AQUACULTURE AT RISK WITHOUT SCALED ALTERNATIVE FEEDS**

Aquafeed experts are warning climate change and fishery management restrictions could affect wild catch of forage fish and lead to a 70% decline in the output of certain high-value farmed species if the production of alternative feed ingredients is not scaled up. The warning comes from a new study, “Unstable Supply and Future Shortages of Wild Forage Fish Heighten Risks to Global Fed Aquaculture Production,” which projects that supplies of forage fish used for fishmeal and fish oil could decline by around 20% in the near future due to environmental pressures and regulatory limits.

**USA            US EXTENDS TARIFF EXEMPTIONS FOR FROZEN CHINESE HADDOCK SOLE FOR ANOTHER YEAR**

The Office of the US Trade Representative (USTR) has confirmed that the Trump administration has extended the existing exemption from 25% Section 301 tariffs on frozen haddock fillets and flatfish sole imported from China for an additional year. The move eases concerns across the supply chain, as both product categories had been facing a potential tariff snap-back at the end of November that would have sharply increased landed costs. According to UCN pricing experts, the extension should help stabilize market conditions by removing the risk of an abrupt cost shock. A notice published in the Federal Register on December 1 stated that Section 301 tariff exclusions previously granted for 278 Chinese products—including 10 seafood-related Harmonized Tariff Schedule (HTS) codes—have now been extended through November 20, 2026.

**EUROPE      ZERO-CATCH ADVICE REJECTED AS NORWAY, EU AND UK AGREE TO 2026  
/UK/  
NORWAY      COD QUOTAS**

The International Council for the Exploration of the Sea (ICES) has recommended zero cod catch in 2026, warning that any harvest of the southern sub-stock would push it below safe biomass limits. While ICES said 1,280 MT from the other two sub-stocks could be taken sustainably, it advised a full closure due to the high risk of overfishing the southern stock. The recommendation was met with strong pushback from industry groups, who warned that a total shutdown would be economically devastating and despite the ICES advice, Norway, the EU, and the UK have agreed to maintain a North Sea cod fishery, setting a 2026 total quota of 14,034 MT (a 44% cut from 2025) according to Norway’s Ministry of Trade, Industry and Fisheries.

**CHINA        FISHMEAL PRICES STABILIZE IN CHINA AFTER MONTH OF GAINS**

Offers for super prime fishmeal in Shanghai were unchanged in week 48, marking a pause after a month of steady increases. According to UCN data, prices rose by CNY 500 in week 47, CNY 900 in week 46 and CNY 800 in week 45. Market participants in the world’s largest fishmeal market are now showing greater flexibility, reflecting the end of China’s aquaculture season and easing demand, according to a Peruvian fishmeal trading company.

**ASIA            SEAFOOD EXPO ASIA’S 13TH EDITION ATTRACTS GLOBAL ATTENDANCE**

Seafood Expo Asia’s 13th edition in Singapore drew over 4,190 professionals from 75 countries. The conference program featured a [keynote by leading economist Manu Bhaskaran](#) and covered a range of topics, including sustainable and accountable supply chains in Asia, market access to the region, and the strategic value of sustainability certifications. Event organizer, Diversified, said 42 exhibiting countries took part in this year’s event; the three-day event saw success with its Business Matchmaking Program, a networking opportunity allowing exhibitors and buyers to pre-schedule meetings onsite. More than 440 meetings were confirmed through the program, which took place alongside other events such as the conference program, the product showcase, and Seafood Excellence Asia Awards.

COLD STORAGE HOLDINGS IN JAPAN, (in MT)						
		<u>30.9.2025</u>	<u>31.8.2025</u>	<u>30.9.2024</u>	<u>% change month ago</u>	<u>% change year ago</u>
I	Total Fishery Product	771 826	774 546	769 208	-0.35	0.34
	1. Total frozen products	645 559	648 636	643 171	-0.47	0.37
	2. Total salted products	49 857	49 563	49 743	0.59	0.23
II	Frozen products by species					
1	Tuna	57 246	56 774	61 728	0.83	-7.26
	1.1 Albacore	9 202	9 183	4 010	0.21	129.48
	1.2 Bigeye	8 832	9 284	9 804	-4.87	-9.91
	1.3 Yellowfin	9 993	10 722	10 702	-6.80	-6.62
	1.4 Bluefin	3 022	3 252	3 248	-7.07	-6.96
	1.5 S. Bluefin	3 729	2 624	2 744	42.11	35.90
	1.6 Skipjack	19 240	18 478	28 011	-82.53	-88.48
	1.7 Other tuna	3 228	3 231	3 209	-47.35	-46.99
2	Swordfish	1 701	1 690	1 748	0.65	-2.69
3	Salmon	53 941	58 517	57 653	-7.82	-6.44
4	Trout	9 479	9 010	11 441	5.21	-17.15
5	Sardines	42 685	49 065	39 941	-13.00	6.87
6	Horse mackerel	16 310	16 750	17 204	-2.63	-5.20
7	Chub mackerel	62 607	64 891	60 297	-3.52	3.83
8	Flatfish	7 795	7 893	8 358	-1.24	-6.74
9	Shrimp & prawn	49 963	48 981	48 203	2.00	3.65
10	Cuttlefish & squid	42 778	39 812	42 786	7.45	-0.02
11	Octopus	11 722	12 705	10 428	-7.74	12.41
12	Surimi (pollack)	30 306	30 323	33 051	-0.06	-8.31
13	Other surimi	20 218	21 126	18 400	-4.30	9.88

## SYMBOLS

+	marks higher prices since the last report;	CFR	Cost and Freight	HOSO	Head-on, Shell-on	PUD	Peeled, Undeined
-	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	Sknls	Skinless
<b>Bold print</b>	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 15/12/2025

JPY	(Japan)	155.82	NZ\$	(N Zealand)	1.72
INR	(India)	90.53	CNY	(China)	7.05
NOK	(Norway)	10.12	IDR	(Indonesia)	16 629.90
CAS	(Canada)	1.38	AUS	(Australia)	1.50
MYR	(Malaysia)	4.09	EUR	(EU)	0.85
SG\$	(Singapore)	1.29	THB	(Thailand)	31.49
HK\$	(Hong Kong)	7.78	PHP	(Philippines)	59.07
GB£	(U Kingdom)	0.75	RUB	(Russia)	80.12

**LIVE, FRESH AND CHILLED FISH**  
**INFOFISH Trade News, No. 12/2025**  
**22 December 2025**

**European Union (EU) Imports of Fresh / Chilled Catfish Fillets**

European Union: Imports of Catfish 2022 - 2025 Jan-Sept.								
Partner countries	2022		2023		2024		2025	
	USD	MT	USD	MT	USD	MT	USD	MT
Vietnam	1 882 427	448	1 953 154	419	1 706 320	442	1 557 139	418
Iceland	796 657	69	480 224	53	316 185	39	253 730	28
China (People's Republic of)	69 670	19	23 812	4	1 292	0	99 675	20
Bangladesh	0	0	1 191	0	9 819	2	21 508	5
United States	0	0	0	0	22 354	1	58 407	4
<b>Total (incl. others)</b>	<b>2 983 505</b>	<b>567</b>	<b>2 590 154</b>	<b>491</b>	<b>2 171 826</b>	<b>497</b>	<b>2 081 771</b>	<b>484</b>

Source: Global Trade Tracker

EU imports of fresh and chilled catfish fillets declined slightly in January-September 2025, with volumes down 2.62% year-on-year compared with the same period in 2024. Total imports reached 484 MT, valued at USD 2.08 million, versus 497 MT and USD 2.17 million a year earlier.

Vietnam remained the dominant supplier of HS030432 catfish fillets to the EU, accounting for the vast majority of volumes. Vietnamese shipments totaled 418 MT worth USD 1.56 million in the first nine months of 2025, down marginally in both volume and value year-on-year. Iceland continued to rank second but posted a further decline, with exports falling to 28 MT valued at USD 254 000.

By contrast, smaller suppliers showed signs of recovery. China, Bangladesh and the United States all increased shipments in 2025, with imports from these origins rising more strongly in value than in volume. This trend suggests higher average prices paid by EU buyers for fresh and chilled catfish fillets compared with 2024.

The gradual rebound among the top five exporters supports the view that EU buyers are increasingly diversifying fresh fish supply sources, reflecting shifts in consumer preferences and ongoing supply chain adjustments following price volatility in other seafood categories. Within the EU, the Netherlands and Belgium continued to act as the main entry points, serving both as end markets and transshipment hubs.

While fresh catfish fillets such as pangasius remain, a niche compared with traditional European species like trout or seabass, early 2025 data point to firmer growth momentum than in recent periods. Catfish's mild flavor profile and relatively low price continue to underpin steady year-round demand, particularly in retail and foodservice channels.

**South Korea**

Imported fresh fish fillets in the Republic of Korea include trout, yellowtail, flounder and a range of other whitefish species, serving both retail and foodservice demand. Premium species such as salmon—frequently imported fresh or chilled—continue to enjoy strong popularity across retail and HORECA channels. Korean consumers' preference for high-quality, fresh seafood, driven by health considerations and culinary traditions, continues to support steady demand for fresh fillets alongside whole fish offerings. Current retail prices for fresh fish fillets typically range from around US\$10.8 - US\$18.7/kg, depending on species, region and quality, while wholesale prices are generally in the range of US\$7.6 - US\$13.1/kg.

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**22 December 2025**

**LIVE, FRESH, CHILLED FISH & SEAFOOD**

1US\$ = MYR 4.09  
1US\$ = HK\$ 7.78

FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated	PRICE REFERENCE & MARKET AREA	ORIGIN	
<b>FRESH/CHILLED</b>					
<b>SHRIMP</b>					
<b>Vannamei, fresh/chilled, head-on,</b>	21-30 pc/kg	<b>MYR 55.00</b>	Retail trade, Kuala Lumpur, Malaysia	Imported, SE Asia	
	30-40 pc/kg	MYR 50.00 =			13.45
	60-70 pc/kg	MYR 36.00 =			12.22
<b>BLACK TIGER</b>	Fresh/chilled XL, head-on	<b>MYR 60.00</b>			
<b>BLUE SWIMMING CRAB</b>	Fresh, chilled	MYR 65.00 +		SE Asia	
<b>CHILEAN RED CRAB</b>	Whole, frozen/ thawed	<b>MYR 46.00</b>		Chile	
<b>SQUID</b>	Fresh, chilled, whole				
	Large	MYR 50.00 -	12.22	SE Asia	

INFOFISH Trade News, No. 12/2025 22 December 2025		LIVE, FRESH, CHILLED FISH & SEAFOOD		1US\$ = MYR 4.09 1US\$ = HK\$ 7.78	
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	5.60-5.75/lb +	Wholesale USA	Europe
		3-4 lb/pc	5.70-5.85/lb +		
		2-3 lb/pc	8.15-8.40/lb +	Wholesale Miami, USA	Chile
		3-4 lb/pc	8.25-8.50/lb +		
	4-5 lb/pc	8.25-8.50/lb +			
Steak-cut, fresh/chilled	MYR 110.00	26.89	Retail trade, Kuala Lumpur, Malaysia	Norway/Chile	
Coho, steaks	MYR 69.90	= 17.09			
Salmon head, 600 gm/pc	MYR 25.00-30.00	= 6.11-7.33			
SWORDFISH	H&G, chilled (air-flown)	50-99 lb/pc	7.00-7.25 +	Wholesale East Coast, USA	South America
		100 lb/pc and up	7.25-7.50 +		
GROUPER <i>Epinephelus spp</i>	Whole, medium		9.92 +	Wholesale Rio de Janeiro	Brazil
MUD GROUPER	Whole, fresh	HK\$ 74.25-90.75	- 9.54-11.66	Wholesale Hong Kong	Hong Kong
BROWN SPOTTED GROUPER <i>E. coioides</i>	Whole, fresh/chilled	MYR 26.70	+ 6.53	Wholesale Penang, Malaysia	Thailand
RED GROUPER (Pacific)	Whole, gutted, chilled		7.50-7.75/lb +	fob Southeast, USA	Central America
YELLOW CROAKER	Whole, fresh	HK\$ 36.00-112.20	- 4.63-14.42	Wholesale Hong Kong	Southeast Asia/ China
MANGROVE SNAPPER	Whole, fresh/chilled	MYR 32.13	- 7.86	Wholesale Penang,	Thailand/ Indonesia
LANE SNAPPER <i>Lutjanus guttatus</i>	Eviscerated, 1-2 lb/pc chilled 2-4 lb/pc		5.95-6.25/lb = 6.25-6.50/lb +	fob Southeast, USA	South America
YELLOWTAIL SNAPPER <i>Lutjanus argentiventis</i>	Eviscerated, 1-2 lb/pc chilled 2-4 lb/pc		5.50-5.75/lb - 6.00-6.50/lb +		
SILK SNAPPER	Eviscerated, 1-2 lb/pc chilled 2-4 lb/pc		6.35-6.75/lb - 5.75-6.00/lb -		
SEA PERCH <i>Lateolabrax japonicas</i>	Whole, fresh	HK\$ 82.67-90.94	+ 10.63-11.69	Wholesale Hong Kong	China/ Hong Kong
THREADFIN BREAM	Whole, fresh/chilled, small	MYR 12.13	+ 2.97	Wholesale Kuala Lumpur,	Malaysia
DOLPHIN FISH <i>(mahi mahi)</i>	Fillets		5.27-5.49 +	Wholesale Mexico	Mexico
	H&G, chilled (air-flown)	10-15 lb/pc 15 lb/pc and up	5.25-5.50 - 5.50-5.95 -	fob Southeast, USA	South America
WHITE POMFRET	Whole, Medium fresh/chilled	MYR 34.82	+ 8.51	Wholesale Kuala Lumpur, Malaysia	Thailand & Indonesia
	Whole, fresh/chilled	HK\$ 124.01-198.42	- 15.94-25.50	Wholesale Hong Kong	Local & Imported
BLACK POMFRET	Whole, fresh/chilled	MYR 24.19	+ 5.91	Wholesale Penang, Malaysia	Thailand
		HK\$ 28.00-75.90	- 3.60-9.76	Wholesale Hong Kong	Hong Kong/ China
CHINESE POMFRET	Whole, fresh	HK\$ 462-693	= 59.38-89.07		
BOMBAY DUCK	Whole, fresh	HK\$ 20.00-72.60	+ 2.57-9.33		
SPANISH MACKEREL	Steak-cut, fresh/chilled	MYR 80.00	= 19.56	Retail trade, Kuala Lumpur, Malaysia	India/Indonesia
INDIAN MACKEREL	Whole frozen/thawed	MYR 17.00	- 4.16		South and Southeast Asia

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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 12.84	+ 3.14	Wholesale Penang, Malaysia	Thailand/ Indonesia	
SCAD MACKEREL	Whole, fresh	HK\$ 8.00-33.00	- 1.03-4.24	Wholesale Hong Kong	Hong Kong/ China	
HORSE MACKEREL	Whole, fresh	MYR 12.00	- 2.93	Retail trade, Kuala Lumpur Malaysia	India/Pakistan	
THREADFIN (Senangin)	Whole, fresh	MYR 42.90	= 10.49		Malaysia	
	Steak-cut, fresh/chilled	<b>MYR 80.00</b>	<b>19.56</b>		SE Asia	
SARDINE	Whole, dressed	<b>MYR 17.90</b>	<b>4.38</b>			
HARDTAIL SCAD	Whole, fresh	MYR 8.50	+ 2.08	Wholesale Penang, Malaysia	Thailand	
HAIR TAIL (Ribbon Fish)	Whole, fresh	HK\$ 23.15	+ 2.98	Wholesale Hong Kong	Southeast Asia	
TILAPIA	Fillet, chilled, boneless, skinless	3-5 oz/pc	4.40-5.10/lb =	Wholesale Miami, USA	Latin America	
		5-7 oz/pc	4.40-5.10/lb =			
		7-9 oz/pc	4.40-5.10/lb =			
RED SNAPPER (Farmed)	Whole, fresh/chilled	MYR 55.90	= 13.67	Retail trade, Kuala Lumpur, Malaysia	Malaysia	
INDIAN SALMON (Kurao)	Whole/fresh	MYR 120.00	+ 29.34		SE Asia	
GROUPER	Sliced/cuts, fresh/chilled	MYR 80.00	- 19.56		Malaysia	
WHITE POMFRET	Whole, frozen-thawed, Medium 120-150gm/pc	MYR 70.00	= 17.11			
GOLDEN POMFRET (farmed)	Whole, fresh/chilled	MYR 50.00	+ 12.22		China	
BLACK POMFRET	300-400 g/pc	MYR 27.00	= 6.60			
RIBBON FISH	Slice/Fresh	<b>MYR 44.00</b>	<b>10.76</b>			
ASIAN SEABASS (farmed)	Whole, fresh/chilled, 400/600 gm/pc	MYR 11.00	- 2.69			South and Southeast Asia (India, Malaysia/ Indonesia/ Thailand)
	Sliced/cuts, fresh/chilled	MYR 60.00	= 14.67			
BLACK TILAPIA (farmed)	Whole, fresh, 200-400 gm/pc	MYR 6.00	- 1.47			
PINK / RED TILAPIA (farmed)	Whole, fresh, 500 gm/pc, ready to fry	MYR 23.00	= 5.62		Malaysia	
PANGASIUS (farmed)	Whole, fresh	MYR 10.00	+ 2.44			
FISH HEAD	Fish heads, chilled, all types	MYR 27.00	+ 6.50		Southeast Asia	
CHANNEL CATFISH	Fillet, fresh	3-5 oz/pc	5.50-5.90/lb =	Wholesale NY, USA	USA	
		5-7 oz/pc	5.60-5.90/lb =			
CONGER EEL	Whole, fresh	HK\$ 36.00-79.20	+ 4.63-10.18	Wholesale Hong Kong	Hong Kong/ China	

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**LIVE, FRESH, CHILLED FISH &  
 SEAFOOD**

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<b>FISH SPECIES TRADE NAMES</b>	<b>PRODUCT FORM &amp; GRADING</b>	<b>INDICATIVE PRICE in US\$/kg if not otherwise stated</b>	<b>PRICE REFERENCE &amp; MARKET AREA</b>	<b>ORIGIN</b>
<b>LIVE FISH AND SEAFOOD</b>				
<b>BROWN SPOTTED GROUPE</b>	Live	HK\$ 120-297 = 15.42-38.17	Wholesale, Hong Kong	Southeast Asia
<b>GREEN GROUPE</b>	Live	HK\$ 116-260 + 14.91-33.42		
<b>LEOPARD CORAL GROUPE</b>	Live	HK\$ 230-660 = 29.56-84.83		
<b>BROWN MARBLED GROUPE</b>	Live	HK\$ 190-396 + 24.42-50.90		
<b>RED GROUPE</b>	Live	HK\$ 1155-1320 - 148.46-169.67		
<b>MANGROVE SNAPPER</b>	Live	HK\$ 59-130 - 7.58-16.71		
<b>MALABAR RED SNAPPER</b>	Live	HK\$ 52-130 = 6.68-16.71		
<b>RUSELL SNAPPER</b>	Live	HK\$ 105-198 - 13.50-25.45		
<b>POMPANO</b>	Live	HK\$ 50-100 = 6.43-12.85		

**FROZEN FISH & FILLETS**  
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**EU imports (frozen fish & fillets)**

Whole frozen fish continues to represent a major import segment in the EU Common Market, supplying both processing industries and direct retail channels. However, import volumes have softened in recent years amid price pressures and shifting market dynamics. EU imports of frozen fish (excluding fish fillets and other fish meat under HS heading 0304) fell by 20.94% year-on-year in January–September 2025, totaling 523 629 MT, down from 662 319 MT over the same period in 2024. China and Norway remain critical external suppliers to the bloc, while Germany and the Netherlands continue to act as leading import destinations within the EU, serving as both consumption markets and distribution hubs.

By species, frozen cod recorded the steepest decline, with imports dropping to 69 058 MT in 2025 from 110 520 MT a year earlier. Other key species also posted lower volumes, including frozen halibut, hake, flatfish and Pacific salmon. In contrast, imports of frozen tilapia and frozen catfish showed moderate growth, pointing to continued demand for lower-cost whitefish alternatives. Mackerel and sardine volumes rebounded from weaker 2024 levels but remained below earlier peaks.

Market trends indicate that Alaska pollock, cod, haddock and Pacific salmon continue to dominate frozen fillet trade within the EU, reflecting their importance to both processing and retail sectors.

<b>EU Imports of Frozen Fish (excl. Fish fillets and other Fish meat)</b>					
<b>January – September 2022 - 2025 (in MT)</b>					
<b>HS Code</b>	<b>Description</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
		<b>MT</b>	<b>MT</b>	<b>MT</b>	<b>MT</b>
030389	Frozen fish	80 772	77 986	95 314	80 588
030363	Frozen cod	107 123	110 386	110 520	69 058
030354	Frozen mackerel	64 625	68 281	50 428	58 344
030353	Frozen sardines	54 051	47 808	31 365	39 065
030366	Frozen hake	36 779	31 360	36 126	29 524
030331	Frozen halibut	44 391	44 260	42 317	24 943
030323	Frozen tilapia	15 755	16 461	18 734	20 255
030339	Frozen flat fish	15 054	11 045	11 069	9 872
030314	Frozen trout (all spp.)	9 138	8 809	10 871	9 235
030355	Frozen jack and horse mackerel	8 699	4 841	7 127	8 136
030324	Frozen catfish	5 971	5 894	6 563	7 199
030311	Frozen sockeye salmon (red salmon)	15 281	9 951	13 356	6 043
030359	Frozen anchovies (all spp.)	8 487	6 650	7 544	5 966
030325	Frozen carp (all spp.)	5 593	7 707	10 288	5 958
030312	Frozen pacific salmon (excl. sockeye salmon "red salmon")	10 425	10 037	10 157	4 044
<b>Total (incl. Others)</b>	<b>Frozen fish (excl. fish fillets and other fish meat of heading 0304)</b>	<b>691 760</b>	<b>636 126</b>	<b>662 319</b>	<b>523 629</b>

Source: Global Trade Tracker

**Global**

The frozen fish sector continues to expand, supported by rising consumer demand for convenient, high-quality and sustainably sourced seafood. The global frozen fish market was valued at an estimated US\$6.96 billion in 2025, with advances in freezing and cold-chain technologies significantly improving product quality, safety and nutritional retention. These developments are supporting higher consumption of frozen freshwater species and driving innovation in value-added frozen fish products, particularly among consumers seeking easy-to-prepare and healthy protein options.

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**FROZEN FISH & FILLETS**

1US\$ = MYR 4.09

<b>FISH SPECIES TRADE NAMES</b>	<b>PRODUCT FORM &amp; GRADING</b>	<b>INDICATIVE PRICE in US\$/kg if not otherwise stated</b>		<b>PRICE REFERENCE &amp; MARKET AREA</b>	<b>ORIGIN</b>
<b>ATLANTIC SALMON</b>	Farmed, portions 4 oz/pc	6 oz/pc 7.00-7.30/lb =	8 oz/pc 7.10-7.40/lb =	fob Miami, USA	Chile
	Farmed, fillet, PBO 2/3 lbs/pc	3/4 lbs/pc 5.00-5.20/lb =	4/5 lbs/pc 5.10-5.30/lb =	fob Miami, USA	Chile
	Portion, 250 g/(pack)	<b>MYR 95.60</b>	<b>23.37</b>	Retail trade, Kuala Lumpur, Malaysia	Chile

INFOFISH Trade News, No. 12/2025 22 December 2025		FROZEN FISH & FILLETS		1US\$ = MYR 4.09	
FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN
COD	Tails, Bnls/Sknl, IQF	3-6 oz/pc	6.75-6.90/lb =	Ex-warehouse NY, USA	China
	Loins, Bnls/Sknl, IQF	3-8 oz/pc	9.00-9.25/lb +		
	Fillet, IQF	8/16 oz/pc	7.40-7.55/lb =		
4/8 oz/pc	7.40-7.55/lb =	16/32 oz/pc	7.40-7.55/lb +		
HADDOCK	Fillet, IQF, Bnls/Sknl	10/12 oz/pc	7.00-7.15/lb =		
	6/8 oz/pc	7.00-7.15/lb =	12 oz/pc up		
FLOUNDER	Fillet, IQF, 10 lb pack	5 oz/pc	4.25-4.50/lb +		
	3 oz/pc	3.95-4.15/lb +	6 oz/pc	4.35-4.60/lb +	
ALASKA POLLACK	Fillet, 10 lbs pack, boneless, IQF	4/6 oz/pc	2.35-2.50/lb =		
	2/4 oz/pc	2.15-2.35/lb =	6/8 oz/pc	2.35-2.50/lb =	
CHILEAN SEABASS	Portions	8 oz/pc	24.50-25.00/lb =	Chile	
	6 oz/pc	24.25-24.50/lb =	10 oz/pc		24.50-25.00/lb =
DOLPHIN FISH ( <i>mahi-mahi</i> )	Whole, skin-on, H&G, boxed	6/8 oz/pc	17.75-18.00/lb =		
		8/10 oz/pc	17.50-18.00/lb =		
WHITE SNAPPER	Portions, boneless, skinless	6 oz/pc	-	Ex-warehouse, NY, USA	Peru
	4 oz/pc	-	8 oz/pc		
OCEAN PERCH	Whole round, IQF, running weight	3000-5000	3.00 =	cfr Thailand	India
		5000 up	3.00 =		
INDIAN MACKEREL	Fillet, Skin-on/Boneless	300/500 pc/kg	8.40	cfr Europe	India
	200/300 pc/kg	8.20	500-1000 pc/kg		
SABA MACKEREL	Fillet, Skin-on/Boneless	4/6 pc/oz	3.55-3.70/lb =	Ex-warehouse NY, USA	China
		6/8 pc/oz	3.55-3.70/lb =		
HORSE MACKEREL	Whole, round, IQF, 10 kg pack	10/12 pc/kg	2.10 =	cfr Dominican Republic	India
	8/10 pc/kg	2.25 =	12/15 pc/kg		
TILAPIA (farmed) *	Whole, frozen, 6-8 pc/kg	MYR 10.00	-	Retail trade, Kuala Lumpur, Malaysia	Norway
	Frozen fillets	MYR 45.00	=		
GROUPE	Whole, frozen,	MYR 9.00	-	cfr Malaysia	India
	Whole, frozen, IQF, 1x20kg bulk	4/5 =	1.90 =		
SARDINE		6/8 =	1.90 =		
	Whole, frozen	MYR 17.00	=	4.16	Retail trade, Kuala Lumpur, Malaysia
BARRACUDA	Frozen, fillets	MYR 25.00	=	6.11	China
	Fillet	8/10 kg	4.91-5.18 =	Wholesale Mexico	Mexico
	Fillet, IQF (no moisture added)	5/7 oz/pc	2.95-3.25/lb -	Ex-warehouse, New York, USA	China
	3/5 oz/pc	2.95-3.25/lb -	7/9 oz/pc		
	Moon cut, gutted, IQF, 10 kg bulk, 20% compensated glaze	80/100 pc/kg	0.90 -	cfr Dubai	India
	100/200 pc/kg	1.10 -			
	200/300 pc/kg	1.20 -			
PANGASIUS CATFISH (farmed) *	Whole, round, IQF, 10 kg bulk, 100 net weights, frozen	500/700 gm/pc	4.00	cfr Thailand	India
	200/300 gm/pc	2.80	700/1000 gm/pc		
PANGASIUS CATFISH (farmed) *	300/500 gm/pc	3.10	1000 & up gm/pc	4.90	
	Whole, round, IQF, 10 & 20 kg bulk	1000/2000 gm/pc	2.70	cfr UK	India
200/300 gm/pc	-	2000/3000 gm/pc	2.70		
500/1000 gm/pc	2.70	3000 & up gm/pc	2.70		
PANGASIUS CATFISH (farmed) *	Fillet, skinless, IQF, 20% glaze	170/220 gm/pc	2.90 =	cfr Belgium	Vietnam
	Fillet, IQF		3.90 =		
	Striped ( <i>Swai</i> ), fillets, skinless, boneless	5/7 oz/pc	2.10-2.25/lb =	Ex-warehouse, New York, USA	China
	3/5 oz/pc	2.10-2.25/lb =	9/11 oz/pc		
CHANNEL CATFISH (*) <i>Ictalurus sp</i>	Steaks, frozen, 20-30 g/pc	MYR 16.00	=	Retail trade, Kuala Lumpur, Malaysia	Vietnam
	Skewer, frozen	MYR 35.00	=		
CHANNEL CATFISH (*) <i>Ictalurus sp</i>	Fillet, skinless, boneless	5/7 oz/pc	3.80-4.00/lb =	Ex-warehouse, New York, USA	China
	3/5 oz/pc	3.80-3.95/lb =	5/7 oz/pc		
	3/5 oz/pc	5.40-5.85/lb =	5/7 oz/pc	5.65-5.95/lb =	USA

**CHILLED & FROZEN TUNA**  
**INFOFISH Trade News, No. 12/2025**  
**22 December 2025**

**Market trends for non-canned tuna:**

Global trade in non-canned tuna showed mixed trends in the first nine months of 2025, with a clear shift toward higher-value products. Total global trade of fresh and frozen tuna, including fillets, reached 1.72 million MT, while imports of whole and dressed tuna (fresh and frozen) declined by 11% year-on-year. In contrast, imports of frozen tuna fillets rose by 10.95%, highlighting stronger demand for value-added tuna products.

The top ten importing markets accounted for 82.53% of total frozen tuna fillet imports, with nine of these markets recording year-on-year growth. Japan remained the world’s largest importer, increasing purchases to 53 440 MT, up 8.7% from 2024. The United States followed with 31 785 MT, posting a more modest 3.2% increase.

Southern European markets recorded some of the strongest growth. Spain expanded imports by 35.4% to 13 887 MT, while Portugal more than doubled volumes, rising 82.5% to 8,361 MT. Italy and France also reported steady gains of 9.5% and 4.4%, respectively. In Asia, the Republic of Korea saw imports surge by nearly 58% to 6 082 MT, while Vietnam increased volumes by 35% to 3 332 MT.

The Russian Federation was the main outlier, with imports falling sharply by 61.8% year-on-year to 2 768 MT. Imports by other markets collectively increased by almost 15%, underlining the broad-based nature of demand growth.

Overall, world imports of frozen tuna fillets reached 166 333 MT in January–September 2025, compared with 149 913 MT a year earlier. The contrasting decline in whole tuna trade and expansion in frozen fillets underscores an ongoing structural shift in global tuna markets toward processed, higher-value formats favored by retail and foodservice buyers.

World Imports of Frozen Tuna Fillets, 2021-2025, in MT						
Top 10 Importers	January-September					% change 2025/2024
	2021	2022	2023	2024	2025	
Japan	46 750	43 149	36 105	49 146	53 440	+8.74
USA	26 750	38 527	26 266	30 806	31 785	+3.18
Spain	9 361	14 848	6 983	10 259	13 887	+35.36
Portugal	2 012	2 953	2 946	4 581	8 361	+82.51
France	5 812	7 692	5 364	6 291	6 568	+4.4
Italy	5 732	5 753	5 114	5 653	6 187	+9.45
Korea RP	4 940	6 087	6 886	3 851	6 082	+57.93
Philippines	2 177	2 202	5 392	4 797	5 327	+11.05
Vietnam	1 965	2 637	2 321	2 468	3 332	+35.01
Russian Federation	3 893	5 941	4 407	7 252	2 768	-61.83
Others	18 513	25 623	21 080	24 809	28 596	+14.92
<b>World total</b>	<b>127 905</b>	<b>155 412</b>	<b>122 864</b>	<b>149 913</b>	<b>166 333</b>	<b>+10.95</b>

*Source: Global Trade Tracker*

**Japan**

**Toyosu fish market:** Japan’s year-end tuna market faced short-term disruption in early December after two strong earthquakes, measuring 7.5 and 5.2 in magnitude, struck off the Pacific coast of Aomori Prefecture. The area is a key fishing ground for high-value Pacific bluefin tuna, typically targeted during the peak winter consumption season. The seismic events temporarily affected domestic supply and demand, particularly within the catering and restaurant sector. Despite this, consumer demand rebounded toward the end of the month, peaking in the final week of December as restaurant activity improved alongside traditional year-end celebrations among households and the working population.

At the same time, imports of fresh bigeye and yellowfin tuna from Southern Asian suppliers declined, a trend especially visible at Tokyo’s Toyosu wholesale auction market. Japan’s domestic *sashimi* trade continues to face mounting competition, as an increasing share of high-value tuna supplies is diverted to China and other fast-growing Asia-Pacific markets. This shift has reduced the competitiveness of Japanese traders in sourcing premium fresh tuna.

As a result, tuna restaurants in Japan are increasingly relying on frozen tuna fillets, which offer longer shelf life and easier handling. Imports of frozen tuna fillets rose by 8.74% year-on-year during the first nine months of 2025. Growth was driven primarily by yellowfin tuna fillets, which surged by 30.14% compared with the same period in 2024. Imports of frozen bigeye fillets also increased moderately, up 6.36% year-on-year. In contrast, frozen bluefin fillet imports edged lower by 3.88%, reflecting tighter availability and continued price sensitivity in the premium segment.

Overall, the data point to a continued structural shift in Japan’s tuna market away from fresh imports and toward frozen fillets, as domestic buyers adapt to supply constraints, rising competition from regional markets and changing operational needs within the foodservice sector.

<b>Japan: Half-Yearly Imports of Tuna Fillets, 2021-2025, in MT.</b>						
<b>Tuna Fillets</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>% change 2025/2024</b>
Frozen fillet of bluefin	21 685	18 940	16 489	22 634	21 756	-3.88
Frozen fillets of yellowfin	11 701	12 019	10 559	11 935	15 532	30.14
Frozen fillets of bigeye	9 767	7 115	5 836	9 338	9 932	6.36
Frozen fillets of tunas (others)	3 448	5 074	3 221	5 234	6 198	18.42
Frozen fillets of skipjack	137	0	0	0	21	-
<b>Frozen fillets of tuna Total</b>	<b>46 748</b>	<b>43 149</b>	<b>36 105</b>	<b>49 146</b>	<b>53 441</b>	<b>8.74</b>

*Source: Ministry of Finance, Japan*

### Europe

The EU-27 emerged as the world’s second-largest import market for frozen tuna fillets in January-September 2025, after Japan, with total imports reaching 33 182 MT. This represented a sharp 30.58% year-on-year increase, underlining strong demand across the European Common Market.

Spain and Portugal led EU purchases, followed by France, Italy, the Netherlands, Belgium and Germany. Imports expanded in nearly all member states, confirming the growing popularity of frozen tuna fillets across the bloc. France was the only exception, recording a modest 3% decline year-on-year.

Growth was not limited to the EU. Other European markets also reported higher imports during the first nine months of 2025. The United Kingdom increased purchases by 27% to 2 575 MT, while Ukraine posted a 37.8% rise to 1 536 MT. Switzerland imported 316 MT, up 6.4%, and Norway recorded a 3% increase to 104 MT.

Overall, the data point to sustained and broad-based growth in European demand for frozen tuna fillets, driven by their suitability for processing, retail and foodservice use, as well as continued consumer preference for convenient, value-added seafood products.

### USA

Consumer demand for non-canned tuna in the United States remained steady through the summer months, supporting higher import volumes in 2025. Total US imports of fresh and frozen non-canned tuna—including fillets, steaks and whole fish—rose by 5.88% year-on-year in January–September 2025 compared with the same period in 2024, reaching 54 040 MT. The increase came despite the introduction of retaliatory tariffs on certain seafood imports from late August 2025.

Frozen tuna fillets continued to dominate the import mix, totaling 31 785 MT during the period, up nearly 3% year-on-year. Vietnam, Indonesia, Thailand, the Philippines and Taiwan were the leading suppliers, reflecting the US market’s strong reliance on Asian processing hubs for value-added tuna products.

Fresh tuna imports recorded stronger growth, rising by 11.76% to 19 241 MT—the highest level in five years. Supplies were sourced mainly from Latin American producers and Spain, supported by sustained demand from sushi, *sashimi* and foodservice segments.

By contrast, imports of frozen whole tuna declined slightly, down 1.9% to 3 014 MT, underscoring the continued shift in US buying patterns toward fresh and frozen fillets rather than whole fish formats.

Overall, the data point to resilient US demand for non-canned tuna in 2025, with growth concentrated in higher-value and more convenient product forms, even as trade policy developments add uncertainty to the import outlook.

USA: Fresh and Frozen Tuna Imports, January-September 2021-2025, in MT						
Descriptions	January - September					% change 2025/2024
	2021	2022	2023	2024	2025	
Tuna - frozen fillets	26 750	38 527	26 266	30 806	31 785	+2.92
Tuna - fresh whole	16 213	17 368	17 932	17 440	19 241	+11.76
Tuna - frozen whole	4 019	7 674	3 634	3 073	3 014	-1.92
<b>Total Tuna, fresh and frozen</b>	<b>46 982</b>	<b>63 569</b>	<b>47 832</b>	<b>51 319</b>	<b>54 040</b>	<b>+5.88</b>

Source: Global Trade Tracker

### Raw materials for canning and other uses

Revised trade data show that global imports of whole frozen tuna—used primarily as raw material for canning and other processing—declined by 9.21% year-on-year during January–September 2025, totaling 1.68 million MT. With the exception of Japan, the bulk of these imports continued to be directed toward semi-processed and processed tuna production rather than direct consumption.

In Asia, imports of whole frozen tuna fell across several major processing hubs, including Thailand, Viet Nam, the Philippines and China, reflecting softer raw material demand and ongoing adjustments in processing activity. Thailand remained the world’s largest importer despite a sharp year-on-year decline, while Viet Nam’s imports were broadly stable compared with 2024 levels. By contrast, Ecuador recorded an increase in frozen tuna imports during the period, underlining its growing role as a processing and export center.

In Europe, trends were mixed. Spain reduced imports of whole frozen tuna in January–September 2025, while Portugal, Italy and France all recorded higher volumes, pointing to a partial rebalancing of raw material flows within the region. Japan stood out globally, increasing imports of whole frozen tuna to 165 478 MT, up from 148 565 MT a year earlier, reinforcing its continued demand for raw material supply alongside domestic consumption needs.

Overall, world imports of whole frozen tuna, including all markets, reached 1.68 million MT in the first nine months of 2025, down from 1.86 million MT in the same period of 2024, confirming a broad-based contraction in global demand for canning-grade tuna raw materials.

World Imports of Frozen Tuna, January-September 2021-2025, In MT					
Importing countries	January -September				
	2021	2022	2023	2024	2025
Thailand	545 137	562 596	508 975	707 375	554 726
Japan	146 066	139 295	145 845	148 565	165 478
Vietnam	96 696	125 154	128 510	155 721	155 332
Philippines	145 794	129 411	97 953	129 086	118 776
Côte d'Ivoire	49 379	85 480	71 671	92 281	106 746
Spain	118 229	98 814	68 717	100 210	96 903
Mauritius	67 010	65 459	61 405	58 682	73 395
Ecuador	61 697	51 484	50 892	42 789	55 933
China	18 946	694	25 622	106 272	36 329
<b>World total including others</b>	<b>1 620 200</b>	<b>1 631 434</b>	<b>1 415 196</b>	<b>1 855 770</b>	<b>1 684 795</b>

Source: Global Trade Tracker

**Outlook**

In Japan, overall demand for sashimi-grade tuna is expected to remain brisk during the final week of December, driven primarily by the restaurant and catering sector amid year-end celebrations. Similar consumption patterns are anticipated across other Asia-Far East markets, with demand extending for a longer period due to the combined impact of the Gregorian New Year in January and the Lunar New Year in mid-February. As a result, prices for high-value tuna are expected to stay firm through to the end of February.

By contrast, demand for raw tuna destined for reprocessing is likely to remain subdued in December and January in key processing hubs, including southern Europe, Ecuador, Thailand and the Philippines. This seasonal slowdown reflects temporary closures and reduced operating schedules at tuna canneries during the Christmas and New Year holiday period.

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**FRESH/CHILLED & FROZEN TUNA**

1US\$ = JPY 155.82

FISH SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE In ¥/kg	US\$/mt	PRICE REFERENCE & MARKET AREA	ORIGIN	
<b>FRESH AND FROZEN TUNA: SASHIMI AND NON-SASHIMI GRADE</b>						
<b>BLUEFIN</b> <i>Thunnus thynnus</i>	Fresh, whole/dressed	-		Auction Toyosu Market, Tokyo, Japan	Imported	
		¥ 2700-14040 +	17328-90104/mt		Miyagi, Japan	
		¥ 3240-5940 -	20793-38121/mt		Japan	
	G&G, frozen	¥ 2700-4752 +	17328-30497/mt		Imported	
<b>SOUTHERN BLUEFIN</b> <i>Thunnus maccoyii</i>	Fresh, whole/dressed	-			Imported	
	G&G, frozen	¥ 972-5400 +	6238-34655/mt			
<b>BIGEYE</b> <i>Thunnus obesus</i>	Fresh, whole/dressed	¥ 1836-3888 +	11783-24952/mt		Chiba, Japan	
	G&G, frozen	¥ 972-2484 =	6238-15941/mt		Imported	
<b>YELLOWFIN</b> <i>Thunnus albacares</i>	Fresh, whole/dressed	¥ 1188-1620	7624-10397/mt		Tokyo, Japan	
	G&G, frozen	¥ 972-1296 +	6238-8317/mt		Imported	
	Loins, (cleaned), skin less, black meat off, 20kg bulk, 10% glaze	2kg and up	5000/mt =	cfr Europe	India	
	Steaks, vacuum packed, 4pcs	80 -120	5600mt =			
	Loins, (cleaned), IQF, CO treated, vacuum packed	5-8 lb/pc 8 lb/pc and up	4.95-5.15/lb = 4.95-5.15/lb =	Wholesale New York, USA	Asia	
	Steaks (CO treated), frozen	4 oz	4.50-4.65/lb =			
			6 oz	4.85-5.20/lb =		
		8 oz	4.95-5.35/lb =			
<b>FROZEN TUNA FOR CANNING AND FURTHER PROCESSING</b>						
<b>YELLOWFIN</b> <i>Thunnus albacares</i>	Whole/Round, 10 kg & up/pc	¥ 332 +	2131/mt	Auction Yaizu Market, Japan	(Deepsea P/S)	
	Whole/Round,		2870/mt -	fob Seychelles	Indian Ocean	
	Whole Round, 10/20 kg 20/30 kg		<b>2300/mt</b> <b>2400/mt</b>	cfr <b>Vietnam</b>	India	
	Pre-cooked tuna loins & double cleaned		8800/mt =	cfr Europe	India	
<b>SKIPJACK</b> <i>Euthynus pelamis</i>	Whole/Round, 1.8 kg/pc and up	¥ 227 +	1457/mt	Auction Yaizu Market, Japan	S W Pacific (Purse seiner)	
	Whole round, 2 kg & up/pc		-	cfr Vietnam	India	
	Whole, round			1500/mt -	cfr Bangkok, Thailand	Western Pacific
				1440/mt +	fob Seychelles	Indian Ocean
				1850/mt +	Ex-vessel Ecuador	Eastern Pacific
Precooked loins		6500/mt =	cfr Europe	India		
<b>ALBACORE</b> <i>Thunnus alalunga</i>	Round, 10 kg/pc and up	¥ 332 +	2131/mt	Wholesale Yaizu, Japan	Pacific Ocean	

**SHRIMP**  
**INFOFISH Trade News, No 12/2025**  
**22 December 2025**

Farmed shrimp production across South and Southeast Asia typically declines during the winter months from December to February, and 2025 has followed this seasonal pattern. During this period, Ecuadorian shrimp has continued to play a critical role in filling global supply gaps. Imports of frozen shrimp raw material from Ecuador increased sharply into Vietnam and Thailand in 2025 compared with 2024, supporting processing activity in both countries.

**Exports**

Global shrimp exports recorded a moderate increase during January–September 2025, reaching 2.93 million MT. Supplies expanded from most leading exporters, with the notable exceptions of Thailand and Argentina. Ecuador further consolidated its position as the world’s largest shrimp exporter, with shipments surpassing one million MT and accounting for 35.6% of total global shrimp exports during the period.

Exports from Ecuador rose by 13.7% year-on-year to 1.04 million MT, while India posted a solid 10.8% increase to 588 319 MT. Vietnam and Indonesia recorded marginal growth, while China expanded exports by 18.3%. In contrast, Thailand’s exports declined by 7.3% and Argentina experienced a sharp contraction of more than 30%, reflecting supply constraints and market challenges.

<b>World Shrimp Exports, January–September, in MT</b>						
<b>Sources</b>	<b>January–September</b>					<b>% change 2025/2024</b>
	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	
Ecuador	612 354	805 289	916 862	918 133	1 043 532	+13.66
India	545 765	535 479	537 016	530 846	588 319	+10.83
Vietnam	237 068	248 102	215 685	241 707	245 075	+1.39
Indonesia	184 384	180 104	163 859	165 573	166 854	+0.77
China	126 613	104 478	105 339	123 725	146 304	+18.25
Thailand	116 844	112 225	101 861	100 531	93 207	-7.29
Argentina	127 875	99 354	104 029	119 070	82 497	-30.72
Canada	37 328	38 376	40 024	31 633	34 674	+9.61
Malaysia	31 900	28 695	27 398	23 268	26 761	+15.01
Honduras	25 414	25 582	29 252	22 721	24 142	+6.25
Saudi Arabia	12 751	21 036	20 257	17 254	21 801	+26.35
Bangladesh	0	0	5 979	13 530	16 285	+20.36
<b>Others</b>	484 177	492 729	480 342	484 746	442 446	-8.67
<b>World Total</b>	<b>2 542 473</b>	<b>2 691 449</b>	<b>2 747 903</b>	<b>2 792 737</b>	<b>2 931 897</b>	<b>+4.98</b>

*Source: Global Trade Tracker*

International shrimp trade continued to expand into October, when cumulative exports reached 3.25 million MT. During January–October 2025, exports increased from Ecuador (+15.6%), India (+10.3%) and Indonesia (+16.3%), but declined from Viet Nam, China, Thailand and Malaysia.

Ecuador’s cumulative exports reached 1.16 million MT by October, supported by higher shipments to China, which rose by nearly 20 000 MT year-on-year. Exports also increased to Viet Nam, while shipments to the Republic of Korea declined. Ecuadorian exports to the United States rose sharply by 24.3% to 227 081 MT during January–September 2025, despite the introduction of higher US tariffs on most shrimp suppliers from late August.

India also recorded cumulative export growth of 10.3% during January–October 2025, even as exports to its largest market, the United States, fell by 5.2% to 236 515 MT. This overall growth was largely driven by a surge in exports to Viet Nam, which increased by 92.5%, equivalent to around 28 000 MT.

**Imports**

On the import side, shrimp purchases increased in most global markets during the first ten months of 2025, with the exception of China. Despite this, China remained the world’s largest shrimp import market, continuing to source large volumes from a broad range of suppliers.

Shrimp imports from Ecuador to China remained broadly stable at around 500 000 MT during January–September 2023–2025, while Ecuador expanded exports to several other Asian destinations. The higher tariffs imposed by the United States appear to have opened new opportunities for Indian shrimp exporters in alternative markets, although the full impact on trade flows is expected to become clearer once full-year 2025 statistics are available.

### China

China's shrimp imports softened slightly in 2025, with total volumes in January–November down 0.31% year-on-year at 896 342 MT. The marginal decline reflects weaker buying during parts of the year, although import activity is expected to pick up in December 2025 and January 2026 in preparation for Chinese New Year celebrations in February.

<b>Shrimp Imports in China, January-November 2021-2025, In MT</b>						
<b>Sources</b>	<b>January-November</b>					<b>% growth 2025/2024</b>
	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	
Ecuador	335 622	502 373	646 490	608 736	600 696	-1.32
India	103 857	123 234	132 323	127 555	129 162	1.26
Thailand	21 863	22 975	26 239	22 590	26 239	16.15
Canada	17 059	27 056	28 490	24 970	24 589	-1.53
Viet-Nam	21 872	37 862	17 621	16 717	18 376	9.92
Greenland	10 788	22 340	21 206	21 642	17 709	-18.17
Argentina	11 547	14 128	27 778	16 253	17 095	5.18
Indonesia	4 905	14 654	16 073	9 126	11 478	25.77
Norway	376	543	480	1 406	7 907	462.38
Myanmar	2 775	8 740	8 068	5 365	7 418	38.27
Saudi Arabia	6 979	14 621	17 399	13 217	6 903	-47.77
Venezuela	3 160	6 349	5 250	6 678	6 286	-5.87
Pakistan	4 352	5 313	4 327	4 001	4 422	10.52
Russian Federation	4 130	4 148	5 318	4 038	4 097	1.46
Malaysia	13 001	7 071	7 557	3 506	3 398	-3.08
<b>Total incld. others</b>	<b>579 422</b>	<b>843 688</b>	<b>992 732</b>	<b>899 120</b>	<b>896 342</b>	<b>-0.31</b>

*Source: Global Trade Tracker*

Ecuador remained China's largest shrimp supplier, accounting for more than two-thirds of total imports, despite a 1.3% year-on-year decline to 600 696 MT. India consolidated its position as the second-largest supplier, with shipments edging up 1.3% to 129,162 MT. Thailand recorded stronger growth, increasing exports to China by 16.2% to 26 239 MT, while Viet Nam also posted a near 10% rise to 18 376 MT.

Several smaller suppliers registered notable changes. Indonesia expanded shipments by 25.8% to 11 478 MT, while Norway recorded a sharp increase from a low base, reaching 7 907 MT. Myanmar also saw robust growth of 38.3%. In contrast, supplies from Greenland, Saudi Arabia and Malaysia declined significantly, reflecting shifting sourcing patterns.

Overall, despite the slight year-on-year contraction in January–November volumes, China remains the world's largest shrimp import market. Seasonal demand linked to the Lunar New Year is expected to support higher import volumes in the coming months, potentially reversing the modest decline seen earlier in 2025.

### USA

Shrimp imports into the United States slowed after August 2025 following the introduction of punitive tariffs, but overall demand remained positive, confirming stable consumer appetite in the market. Total US shrimp imports reached 611 966 MT in January–September 2025, up 9.45% year-on-year.

The US continues to import shrimp at a higher average value than many other markets, reflecting its strong demand for processed and semi-processed products. During the first nine months of 2025, imports of processed shrimp under HS codes 160521 and 160529 totaled 137 230 MT, accounting for 22.4% of all shrimp imports. Imports of raw peeled shrimp were even higher at 310 632 MT, representing 50.7% of total volumes. India, Ecuador and Indonesia together supplied around 93% of US imports of raw frozen peeled shrimp during the period.

India remained the leading supplier to the US market, increasing shipments by 15.3% year-on-year to 246 494 MT. Ecuador ranked second, with exports rising 10.3% to 166 783 MT, while Indonesia recorded a 5.7% increase to 99 769 MT. Argentina and Mexico posted strong growth of 21.0% and 20.5%, respectively, while supplies from Vietnam and China declined sharply.

US Shrimp Imports, January-September 2021-2025, in MT						
Sources	January-September					% change 2025/2024
	2021	2022	2023	2024	2025	
India	243 991	232 272	215 460	213 880	246 494	15.25
Ecuador	138 373	154 260	154 393	151 213	166 783	10.3
Indonesia	126 023	128 472	107 078	94 349	99 769	5.74
Vietnam	62 239	56 017	43 863	47 689	43 330	-9.14
Thailand	27 167	29 196	19 288	16 999	18 155	6.8
Argentina	11 168	12 892	10 398	10 969	13 275	21.02
Mexico	11 412	13 799	10 225	8 695	10 473	20.45
Saudi Arabia	1 503	654	975	1 722	2 335	35.6
Peru	4 358	3 240	1 733	1 777	2 230	25.49
Canada	1 422	2 012	2 077	1 878	1 531	-18.48
China	6 396	4 499	2 811	2 349	1 190	-49.34
Bangladesh	1 971	1 419	1 110	499	854	71.14
<b>Total incld. others</b>	<b>645 188</b>	<b>645 975</b>	<b>575 330</b>	<b>559 119</b>	<b>611 965</b>	<b>9.45</b>

*Source: Global Trade Tracker*

The import data for October 2025 from the US Bureau of Census were not yet available at the time of reporting. However, Indian national statistics indicate that shrimp exports to the United States fell by 5.1% in January–October 2025, while Ecuador reported a 24.31% increase in shipments to the US market over the same period. This divergence points to a shifting supplier mix following the introduction of tariffs, with Ecuador gaining market share despite higher trade barriers.

### **European Union**

Christmas sales of fisheries and aquaculture products, including shrimp, have been strong across European markets in 2025. While prices for many seafood categories have come under pressure, shrimp has been a notable exception, recording clear price gains after several years of sluggish demand and depressed price levels.

According to the European Fish Price Report (EPR) published by FAO-GLOBEFISH, shrimp prices in Europe rose sharply in December 2025. In Italy, retail prices for headless shell-on vannamei increased by around EUR 0.30/kg within a single month, driven by festive-season demand. Similar price movements were observed in other European markets. The price rally has been amplified by supply-side disruptions. The delayed start of the Argentine red shrimp season, compounded by logistical bottlenecks linked to port strikes in Montevideo, has caused significant shipment delays to Europe. As a result, Argentine shrimp prices have risen by EUR 1.00–2.00/kg over the past two months, depending on size. This marks one of the sharpest price increases recorded for Argentine shrimp in recent years.

On the trade side, shrimp imports into the EU Common Market increased by 6.54% year-on-year during January–September 2025, reaching 447 032 MT. Supplies expanded strongly from Ecuador (+33%), India (+24%) and Viet Nam (+12.93%), while imports from Argentina declined sharply by around 40%, reflecting tighter availability and the ongoing disruptions.

Overall, strong seasonal demand, combined with supply constraints from key origins, has pushed shrimp prices higher across the EU, reversing a prolonged period of weak market performance.

**Asia/Pacific**

Shrimp trade across Southeast Asia and the Far East remained broadly stable throughout 2025, supported by solid demand from both retail and catering sectors. The wider availability of competitively priced vannamei shrimp, compared with higher-cost black tiger shrimp, has been a key factor underpinning market expansion across the region.

During January–October 2025, imports of fresh and frozen shrimp increased in several non-producing markets, including Japan, the Republic of Korea, Hong Kong, Macao and Singapore. These markets continued to rely on external suppliers to meet steady consumer demand, particularly for convenient and affordable shrimp products.

Within the Asia–Pacific trade flow, Ecuador further strengthened its position, increasing its market share relative to Indian shrimp. The strong availability of head-on shrimp from Ecuador has been a major driver of this shift, as this product format is particularly favored in many Oriental markets for both culinary and presentation reasons.

Overall, stable consumption, favorable pricing of vannamei shrimp and greater availability from Ecuador have supported balanced shrimp trade conditions across the Asia–Pacific region in 2025.

**Outlook**

Following the Christmas and New Year holidays, consumer demand for shrimp is expected to ease in North American and European markets, reflecting the typical post-festive slowdown in retail and foodservice consumption.

In the United States, shrimp traders are likely to continue relying more heavily on supplies from Latin America in the coming months, as long as higher tariffs on Asian-origin shrimp remain in place. This is expected to support continued strong shipments from Ecuador and other Latin American suppliers.

By contrast, demand in Southeast Asia and the Far East is set to remain firm through the year-end and New Year period, extending into the lead-up to the Chinese New Year in mid-February 2026. Seasonal production of farmed shrimp in Asia will remain low until late February, creating supply gaps that are likely to be filled by increased shipments from Ecuador.

Overall, shrimp prices are expected to stay firm, with a gradual upward trend continuing into early March, supported by seasonal demand in Asia and tighter global supply conditions.

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**SHRIMP PRICES**

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
<i>Vannamei</i> , HOSO (count/kg)	20/30	3.75/lb -	50/60	2.95/lb -	Ex-warehouse New York, USA	Latin America
	30/40	3.35/lb -	60/70	2.85/lb -		
	40/50	3.15/lb -	70/80	2.70/lb -		
<i>Vannamei</i> , HOSO, semi -IQF	60 pcs			4.50 =	cfr South Korea	Vietnam
Black tiger, HOSO, IQF, 10 x 1 kg, 20% glaze	8/12	8.70 =	21/30	6.30 =	cfr Germany	India
	13/15	8.20 =	30/40	5.80 =		
	16/20	7.05 =				
<i>Vannamei</i> , HLSO, IQF, 10 x 1 kg Plain bag with header card, 25% glaze	8/12	8.35 =	21/25	5.75 =	cfr Spain	India
	13/15	7.15 =	26/30	5.45 =		
	16/20	6.20 =	31/40	5.25 =		
<i>Vannamei</i> , HLSO, IQF, 20 x 1 lb, Printed bag, 35% glaze	6/8	3.00 =	16/20	2.25 =	cfr Dominican Republic	India
	8/12	2.60 =	21/25	2.05 =		
	13/15	2.25 =				
<i>Vannamei</i> , HLSO, IQF, G1 Quality 6 x 1.8 kg block, 100% nett weight	31/35	6.20 =	51/60	5.30 =	cfr China	India
	31/40	6.10 =	61/70	5.00 =		
	41/50	5.50 =	71/90	4.80 =		
<i>Vannamei</i> , HLSO, IQF, G2 Quality, 6 x 2 kg block, 100% nett weight	51/60	5.00 =	71/90	4.60 =	cfr Vietnam	India
	61/70	4.80 =	91/110	4.40 =		
White (wild) HLSO, block frozen	Un/12	12.60/lb =	26/30	5.85/lb =	Ex-warehouse New York, USA	Gulf of Mexico
	Un/15	10.10/lb =	31/35	5.10/lb =		
	16/20	6.95/lb =	36/40	4.85/lb =		
	21/25	6.45/lb =	41/50	4.40/lb =		
	Un/10	11.55/lb +	16/20	5.70/lb +	Ex-warehouse New York, USA	Latin America
Un/12	9.50/lb -	21/25	-			
	Un/15	7.55/lb -				

SHRIMP PRODUCT FORMS	GRADING & INDICATIVE PRICE in US\$/kg if not otherwise stated				PRICE REFERENCE & MARKET AREA	ORIGIN
Vannamei, HLSO, block frozen	13/15 16/20 21/25 26/30 31/35 36/40	5.90/lb - 5.40/lb + 4.50/lb - 4.25/lb - 4.00/lb - 3.90/lb -	41/50 51/60 61/70 71/90 91/110	3.80/lb - 3.60/lb - 3.40/lb - 3.30/lb - 3.15/lb -	Ex-warehouse New York, USA	Latin America
Vannamei, HLSO, block frozen	8/12 16/20 21/25 26/30	8.90/lb + 6.55/lb - 4.65/lb - 4.40/lb -	31/35 36/40 41/50	4.15/lb - 4.00/lb - 4.00/lb -	Ex-warehouse New York, USA	Asia
Vannamei, HLSO, easy peel, IQF	8/12 16/20 21/25 26/30	8.05/lb + 5.80/lb - 5.40/lb - 5.25/lb -	31/40 41/50 51/60	<b>5.10/lb</b> 5.05/lb - 4.50/lb =	Ex-warehouse New York, USA	Asia
Freshwater, (farmed) easy-peel, IQF, HLSO	2/4 4/6	16.35/lb - 15.85/lb =	6/8 8/12	13.15/lb = 9.50/lb -	Ex-warehouse New York, USA	Asia
Black tiger, HLSO, block frozen	4/6 6/8 8/12 13/15 16/20 21/25	11.50 - 10.50 - 9.50 - 8.50 - 7.80 - 7.40 -	31/40 41/50 51/60 61/70 71/90 91/120	6.60 - 6.20 - 5.70 - 5.30 - 5.10 - 4.80 =	cfr Japan	Vietnam
Black tiger, HLSO, block frozen	4/6 6/8 8/12 13/15	20.40/lb + 16.50/lb - 10.05/lb + 9.00/lb =	16/20 21/25 26/30 31/40	8.15/lb = 7.80/lb + 7.65/lb + 6.70/lb =	Ex-warehouse New York, USA	Asia
Deep sea shrimp, PUD, IQF, 10 x 2kg block, 100% nett weight	300/500 400/600	3.80 = 3.50 =	500/800	3.30 =	cfr China	India
<i>Vannamei</i> , P&D, IQF, tail off 10 kg bulk, <i>treated with non-phosphate</i> , 8% glaze 100% nett weight			90/110	6.50 =	cfr France	India
<i>Vannamei</i> , P&D, IQF, 10 x 1kg, poly bag 25% glaze, with header card, frozen	8/12 11/15 16/20	8.95 = 7.65 = 6.95 =	21/25 26/30	6.70 = 6.50 =	cfr United Kingdom	India
<i>Vannamei</i> , HOSO, Semi IQF, 5% glaze, frozen	16/20 21/25	<b>6.25</b> <b>5.90</b>	20/30 30/40	<b>5.60</b> <b>4.90</b>	cfr Dominican Republic	India
<i>Vannamei</i> , HOSO, 2 kg block, net weight	16/20 21/25	<b>6.60</b> <b>6.20</b>	20/30 30/40	<b>5.85</b> <b>5.25</b>		
<i>Vannamei</i> , HLSO, easy peel, IQF, tail on, IQF, 20 x 1lb, 40% glaze,	8/12 13/15 16/20	<b>2.65</b> <b>2.40</b> <b>2.25</b>	21/25 26/30 31/40	<b>2.15</b> <b>1.95</b> <b>1.85</b>	cfr Dominican Republic	India
Deep-sea, raw, PUD, 10 x 2 kg, frozen	300/500 400/600	<b>4.00</b> <b>3.70</b>	500/800	<b>3.50</b>	cfr China	India
<i>Vannamei</i> , raw PUD, IQF, 6 x 2kg block frozen	100/200 200/300	<b>5.20</b> <b>4.80</b>	300/500	<b>4.40</b>	cfr Vietnam	India
<i>Vannamei</i> , raw PUD, tail on, 6 x 2kg, blast frozen, 100% net weight	41/50 51/60	<b>7.90</b> <b>7.30</b>	61/70 71/90	<b>6.85</b> <b>6.20</b>	cfr Belgium	India
<i>Vannamei</i> , pulled vein PD, 10 kg 100% net weight	31/40 41/50	<b>8.05</b> <b>7.55</b>	51/60 61/70	<b>7.35</b> <b>6.95</b>	cfr Spain	India
<i>Vannamei</i> , raw, PD, tail off, IQF, 10 x 1kg, 5% glaze, frozen, Treated with STPP	16/20 21/25 26/30	<b>4.50</b> <b>4.10</b> <b>3.70</b>	31/35 36/40 41/50	<b>3.60</b> <b>3.50</b> <b>3.30</b>	cfr Dominican Republic	India
Black tiger, Peeled and deveined (PD)	21/25 26/30	6.20/lb = 5.80/lb =	31/40	5.50/lb =	Ex-warehouse New York, USA	Asia
<i>Vannamei</i> , PD	16/20 21/25 26/30 31/35	6.35/lb - 5.65/lb - 5.45/lb - 5.25/lb -	31/40 41/50 51/60 61/70	5.20/lb - 4.95/lb - 4.90/lb - 4.85/lb =	Ex-warehouse New York, USA	Ecuador
	16/20 21/25 26/30 31/40 41/50	6.35/lb - 5.60/lb - 5.40/lb - 5.45/lb + 4.90/lb -	51/60 61/70 71/90 91/110 100/200	4.80/lb - 4.75/lb - 4.80/lb = 4.70/lb - 4.40/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 8/12 13/15	16.95 - 11.10 = 9.65 +	16/20 21/25 26/30	8.50 = 6.95 = 6.25 =	Ex-warehouse New York, USA	Asia
Vannamei, PTO	8/12 13/15 16/20 21/25	9.95 = 7.40 - 6.30 - 5.60 -	26/30 31/40 41/50	5.40 - 5.25 = 5.00 =	Ex-warehouse New York, USA	Asia
Vannamei, PTO	13/15 16/20 21/25 26/30	7.45 - 6.40 = 5.75 = 5.50 =	31/35 31/40 41/50	5.50 = 5.25 = 5.00 =	Ex-warehouse New York, USA	Ecuador
<b>BLANCHED AND COOKED</b>						
Sea-caught shrimp, PUD broken blanched, IQF, 10 kg pack, 20% glaze	assorted			<b>3.10</b>	cfr Italy	India
Sea-caught, PUD, blanched, pink/brown IQF 20 x 500gm bag, 20% glaze, frozen	10/20 20/40 40/60	<b>7.25</b> <b>6.40</b> <b>5.90</b>	60/80 80/120 100/200	<b>5.65</b> <b>5.40</b> <b>4.60</b>		
Sea-caught, PUD, blanched, IQF 2 x 5kg / 15 x 650gm, 10% glaze, frozen			broken	<b>4.30</b>	cfr New Zealand	India
PUD, KKD shrimp, blanched, IQF, 10 kg pack, 20% glaze, frozen	80/20 100/120 200/300	<b>4.50</b> <b>4.20</b> <b>3.90</b>	300/500 broken	<b>3.60</b> <b>3.30</b>	cfr Europe	India
Deep-sea shrimp, PUD, cooked, IQF, 10 kg pack, protective glaze, frozen	100/200 200/300	5.30 + 4.80 =	300/500	4.70 =	cfr Denmark	India
Vannamei, P&D, tail off, cooked, IQF, 20 x 1 lb, plain bag with header, STPP treated, 30% glaze	41/50 51/60	2.65/lb + 2.50/lb +	61/70 71/90	2.20/lb - 2.20/lb +	DDP Dominican Republic	India
Vannamei, PD, cooked, IQF	31/40 41/50 51/60 61/70	6.20/lb = 6.10/lb = 5.95/lb = 5.90/lb =	71/90 91/110 110/150 100/200	5.00/lb - 5.50/lb = 5.20/lb + 5.15/lb =	Ex-warehouse, New York, USA	Asia
Black tiger, PTO, cooked	13/15 16/20 21/25	10.40/lb = 9.05/lb + 7.75/lb =	26/30 31/40 41/50	6.70/lb + 6.10/lb = 6.00/lb =	Ex-warehouse, New York, USA	Asia
	13/15 16/20	14.40 = 13.40 =	21/25	12.40 =	cfr USA	Vietnam
Vannamei, P&D, tail off, blanched, IQF, 20 x 1 lb, net weight, 33% glaze	41/50 51/60 61/70	<b>2.25</b> <b>2.15</b> <b>2.05</b>	71/90 91/110	<b>1.95</b> <b>1.75</b>	cfr Dominican Republic	India
Vannamei, P&D, tail on, blanched, IQF, 20 x 1 lb, transparent bag, 100% net weight 30% glaze	31/40 41/50	<b>2.50/lb</b> <b>2.30/lb</b>	51/60 61/70 71/90	<b>2.20/lb</b> <b>2.10/lb</b> <b>2.00/lb</b>	cfr Dominican Republic	India
Vannamei, PTO, cooked	13/15 16/20 21/25 26/30 31/40	10.15/lb = 8.15/lb = 7.25/lb = 6.80/lb = 6.20/lb =	41/50 51/60 61/70 71/90	6.10/lb = 6.10/lb = 5.25/lb + 5.00/lb +	Ex-warehouse, New York, USA	Asia
<b>NOBASHI (PTO)</b>						
NOBASHI (PTO), IQF Black tiger, tray pack	13/15 16/20 21/25	9.20 - 8.40 - 8.00 -	26/30 31/40	7.70 = 7.20 -	cfr Japan	Vietnam
NOBASHI raw breaded, 50% shrimp	26/30 31/40	8.60 - 7.70 -	41/50	7.40 =		
SUSHI ebi, black tiger, cooked, tray pack	21/25	12.30 =	26/30	11.30 =		
NOBASHI Vannamei, IQF	31/40 41/50	6.60 - 6.20 -	51/60 61/70	5.70 = 5.30 =		

**LIVE, FRESH & FROZEN LOBSTER AND CRAB**

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 9.75-10.00/lb - 1 1/8 lb/pc 9.75-10.00/lb -	1 1/4 lb/pc 10.00-10.25/lb - 1 1/2 lb/pc 10.50-11.00/lb -			New York, USA	USA
RED CRAB, live	HK\$ 160-743 +		20.57-84.83		Wholesale Hong Kong	Southeast Asia
THREE-SPOTTED CRAB, live	HK\$ 55.00-132.00 +		6.43-12.72			
ROCK LOBSTER ( <i>Panulirus sp.</i> ), live	HK\$ 264-420 -		42.42-53.98			
ROCK/SPINY LOBSTER (warm water tails), frozen	5 oz/pc -	12/14 oz/pc 17.25-18.00/lb =			Ex-warehouse NY, USA	Brazil
	7 oz/pc -	14/16 oz/pc -				
	8 oz/pc -	16/20 oz/pc -				
	10/12 oz/pc 17.25-18.00/lb =	20/24 oz/pc -				
	5 oz/pc 21.75-22.25/lb -	10/12 oz/pc 17.00-17.25/lb -				Caribbean
	6 oz/pc 21.25-21.75/lb -	12/14 oz/pc 17.00-17.25/lb -				
	7 oz/pc 20.50-21.00/lb -	14/16 oz/pc 17.00-17.25/lb -				
	8 oz/pc 20.50-21.00/lb -	16/20 oz/pc 17.00-17.25/lb -				
KING CRAB, red (legs and claws), frozen	6/9 pc/oz 80.00-83.00/lb -	12/14 pc/oz 69.00-72.00/lb -			Ex-Warehouse West Coast, USA	Norway
	9/12 pc/oz 75.00-78.00/lb -	14/17 pc/oz 64.00-67.00/lb -				

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**FROZEN CEPHALOPODS AND MOLLUSCS**

<b>SPECIES TRADE NAMES</b>	<b>PRODUCT FORM &amp; GRADING</b>	<b>INDICATIVE PRICE in US\$/kg if not otherwise stated</b>	<b>PRICE REFERENCE &amp; MARKET AREA</b>	<b>ORIGIN</b>	
<b>CUTTLEFISH</b> <i>Sepia sp</i>	Whole, cleaned, IQF, 10kg block, 30% glaze U/2 pc/kg -	U/1 pc/kg <b>5.35</b> 1/2 pc/kg <b>5.35</b>	cfr Italy	Kochi, India	
	Whole, cleaned, IQF, 10 kg block, 20% glaze U/1 pc/kg <b>6.40</b> 1/2 pc/kg <b>6.40</b>	2/4 pc/kg <b>6.80</b> 5/7 pc/kg <b>6.80</b> 8/12 pc/kg <b>6.00</b>	cfr Italy	Gujarat, India	
	Whole, cleaned, IQF, 10 kg block, 30% glaze	13/20 <b>6.30</b>	cfr Italy	Gujarat, India	
	Whole, round, IQF, 2 x 10 kg block, net weight 500/1000 pc/kg <b>5.40</b>	1000/2000 pc/kg 5.40 + 2000pc/kg & up 5.40 +	cfr Vietnam	Cochin, India	
<b>BABY CUTTLEFISH</b>	Whole, cleaned, IQF, 10 kg block, with header, 20% glaze 10/20 pc/kg 5.00 + 20/40 pc/kg 4.50 -	40/60 pc/kg 4.30 + 60pc & up 4.00 =	cfr Italy	Gujarat India	
<b>SQUID</b> <i>Loligo sp</i>	Whole, round, 3 x 3.6kg & 6 x 1.8kg block U/3 pc/kg 7.50 = 3/6 pc/kg 7.00 =	6/10 pc/kg 6.00 = 10/20 pc/kg 5.00 =	cfr Thailand	Kochi, India	
	Whole, round, loligo, 3 x 4kg & 6 x 2kg block, Blast frozen U/5 pc/kg 7.80 =	U/10 pc/kg 6.80 = 10/20 pc/kg 5.50 =	cfr Italy		
	Whole, round, loligo, A grade 3 x 4kg & 6 x 2kg block, with 10% glaze U/3 pc/kg 7.60 -	3/6 pc/kg 6.80 - 6/10 pc/kg 5.70 - 10/20 pc/kg 5.80 =			
	Whole, round, semi needle, grade 10 x 1kg blast frozen with 25% glaze U/3 pc/kg -	3/6 pc/kg - 6/10 pc/kg <b>4.25</b> 10/20 pc/kg <b>3.20</b>			
	Whole, round, semi needle A grade 3 x 4kg & 6 x 2kg blast frozen with 10% glaze U/3 pc/kg 6.60 -	3/6 pc/kg 6.20 - 6/10 pc/kg 5.00 - 10/20 pc/kg 4.00 -	cfr Portugal		
	Whole, cleaned, IQF, 6 x 2 kg, block 20% glaze U/10 pc/kg 8.35 =	10/20 pc/kg 6.35 =	cfr Italy		
	Whole, cleaned, IQF, 6 x 1.6 kg, block U/5 pc/kg 10.00 =	U/10 pc/kg 9.75 = 11/20 pc/kg 7.80 =			
	Tubes	5/8 inch 4.85-4.95/lb =	Ex-warehouse NY, USA	China	
	Rings & Tentacles	5/8 inch 4.95-5.15/lb =			
	Tubes & Tentacles	3-5 inch 4.45-4.60/lb = 5-8 inch 4.70-4.80/lb =			
	Raw cut rings (R) & tentacles (T), IQF, skin on, 10 kg pack, with header card, 25% glaze	20/60 inch <b>3.40</b> 40/80 inch -	cfr Italy	Gujarat, India	
	<b>BABY SQUID</b>	Whole, round, 12 x 1 kg, 10% glaze, pin bone out Whole, round, 12 x 1 kg, 10% glaze, pin bone in	80 pc/kg up - 80 pc/kg up 1.30 -	cfr Spain	
	<b>BABY</b>	Whole, cleaned, IQF, 10 x 1 kg with 25% glaze 10/20 pc/kg 4.20/lb = 20/40 pc/kg 4.20/lb =	40/60 pc/kg 4.20/lb = 60pc & up 4.20/lb =	cfr Italy	Kochi
<b>OCTOPUS</b> <i>(Pulpo)</i>	2/4 oz/pc 5.50-5.75/lb = 4/6 oz/pc 6.40-6.45/lb =	6/8 oz/pc 7.15-7.40/lb =	Ex-warehouse NY, USA	Spain	
	Whole round, 5 x 4kg block, 100% net weight 100/200 <b>4.10</b> 200/300 <b>4.10</b>	300/500 <b>4.10</b> 500 & up <b>4.10</b>	cfr Vietnam	India	
<b>CLAMS</b> <i>(Chocolata)</i>	Mixed sizes, large	3.29 -	Wholesale Mexico	Mexico	
<b>OYSTERS</b>	In bags with water without shell	2 <sup>nd</sup> quality bag 30 to 35 kg 5.49 +			

INFOFISH Trade News, No. 12/2025 22 December 2025		PROCESSED AND SEMI-PROCESSED PRODUCTS				
SPECIES	PRODUCT FORM	GRADING & INDICATIVE PRICES in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN	
<b>SQUID</b> <i>Loligo sp</i>	Blanched, rings, IQF, 10 kg bulk, 10% glaze Non treated	40/60 pc/kg	5.40 =	cfr France	Kochi, India	
		60 pc/kg and up	5.30 =			
	Blanched, rings, IQF, 10 kg pack, 20% glaze	<b>60 – UP (SQ TN)</b>	<b>4.65</b>	cfr Italy		
	Blanched, tentacles, IQF, 10 kg pack, 20% glaze	SQ Ring Broken	3.65 -			
Blanched, tentacles, IQF, 10 kg pack, 20% glaze	<b>SQ Rings</b>	<b>5.30</b>				
<b>CATFISH</b> <i>Ictalurus sp</i>	Frozen, breaded fillet	5.00-5.45/lb =	Steaks	3.55-3.80/lb =	Wholesale, New York, USA	
	Breaded fingers	5.00-5.45/lb =	Nugget	1.75-2.00/lb =		
<b>FISH</b>	Nuggets			4.39 +	Wholesale Mexico	
	Steaks, breaded			5.49 +		
<b>MUSSELS</b>	Whole shell, cooked, Medium			4.40-4.50/lb =	Ex-warehouse NY, USA New Zealand	
<b>SURF CLAMS</b> <i>Paphia nudulata</i>	Meat, boiled	200/300 pc/kg	3.60 -	800/1000 pc/kg	3.30 -	cfr Japan
		300/500 pc/kg	3.50 -	1000/1500 pc/kg	3.20 -	
		500/800 pc/kg	3.50 -			
<b>WHITE CLAM</b> <i>Meritrix iyata</i>	Whole, round, boiled, IQF, 1 kg/10/carton			60/80 pc/kg	2.60 =	cfr Portugal Vietnam

**DRIED, SALTED, SMOKED FISH / FISHMEAL & FISH OIL**

SPECIES TRADE NAMES	PRODUCT FORM & GRADING	INDICATIVE PRICE in US\$/kg if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN	
INDIAN MACKEREL	Salted/dried, 200 gm Retail Pack	MYR 30.00 =	7.33	Retail trade, Kuala Lumpur, Malaysia	SE Asia	
CROAKER	Butterfly-cut, salted, dried	MYR 40.00 =	9.78		SE Asia	
BOMBAY DUCK	Whole/Dried, Grade A, Retail Pack (120 gm/Pack)	MYR 80.00 =	19.56		Malaysia/ Indonesia	
ASIAN ANCHOVY (Ikan Bilis)	Blanched, Whole, Salted & Dried Split, Boneless	MYR 70.00 = MYR 100.00 =	17.11 24.45		SE Asia	
BABY ANCHOVY (Silverfish)	Head-on, blanched, salted, dried 250 gm, tray pack	MYR 65.00 =	15.89			
HORSE MACKEREL	Salted, Dried		1.32 +	Wholesale Mexico	Mexico	
GROUPER	Salted, Dried		5.38 +			
SALMON	Smoked		13.44 +			
RAINBOW TROUT	Smoked		4.83 +			
TUNA	Smoked		7.84 +			
TILAPIA	Salted, Dried		5.21 +			
SNOOK	Salted, Dried		8.89-9.16 +			
RAY FIN	Dried, Salted		1.97 +			
COD	Salted, Dried		13.99 +			Campeche Mexico
DRIED SHRIMP Baby shrimp ( <i>Acetes</i> )	Whole, blanched/dried, Grade A 110 gm/retail Pack	MYR 24.50 =	5.99			Retail trade, Kuala Lumpur, Malaysia
	Peeled, cooked/dried, 100 gm tray pack	MYR 90.00 =	22.00			
SHRIMP PASTE (Belacan)	Farmented/dried	MYR 25.80 =	6.30			
ASIAN SEABASS	Frozen fillet, 230g/pack	<b>MYR 65.70</b>	<b>16.06</b>			
SHRIMP	Raw Dried/Salted-Whole Small Medium Large		5.38-5.76 +	Wholesale Mexico	Mexico	
			7.79-8.34 +			
			10.59-11.14 +			
	Raw Dried/Salted-Head Off Small Medium Large		6.13-6.69 +			
			8.67-9.22 +			
			11.25-11.79 +			
	Cooked Dried/Salted-Whole Small Medium Large		6.14-6.69 +			
			8.89-9.43 +			
			11.68-12.23 +			
FISHMEAL	Peru Fishmeal Prices Per Mt					
	<u>Destination</u>	<u>Type</u>	<u>Terms</u>	<u>Price</u>	<u>Product Shipment Date</u>	
	-	-	-	-	-	
Fish Oil	Peru Fish Oil Prices Per Mt					
	<u>Destination</u>	<u>Type</u>	<u>Terms</u>	<u>Price</u>	<u>Product Shipment Date</u>	
	China	Crude-OMG28	FOB Calla-FCL	4325	Dec-Jan	
	China	Crude-OMG28	FOB Calla-FCL	4475	Dec-Jan	
	Sub America	Crude-OMG28	FOB Calla-FCL	2230	Dec-Jan	

**CANNED FISH**  
**INFOFISH Trade News, No. 12/2025**  
**22 December 2025**

**Imports:**

International trade in semi-processed tuna (cooked loins for further processing) and ready-to-eat tuna products, including canned and other preparations, reached record levels during January–September 2025. Global imports rose by 12.48% year-on-year in volume to 1.316 million MT, while import value increased by 9.18% to US\$7.13 billion, reflecting strong demand across major consumer markets.

The United States, the United Kingdom, Japan, Australia and Egypt were the leading importers of ready-to-eat tuna products during the review period. In the Asia–Pacific region, imports—largely finished products—increased in Japan but declined in Australia. In the United States, the world’s largest market for end products, imports were strong between May and July 2025 but began to soften from August onward following the introduction of higher tariffs.

At the same time, imports of semi-processed raw material in the form of cooked or frozen tuna loins increased among tuna canners in Europe and Thailand. This trend favored higher exports from Ecuador to European processors, as well as increased shipments from Asian suppliers into Thailand.

**Exports:**

Thailand retained its position as the world’s leading supplier of processed and canned tuna, accounting for 31.46% of global exports during January–September 2025. However, Thai exports declined marginally by 1.41% year-on-year, largely due to reduced shipments to the United States from August onward as a result of higher tariffs.

Ecuador strengthened its export performance, supported by robust demand from European tuna canners for cooked and frozen tuna loins. By contrast, exports from China and the Philippines declined compared with the same period in 2024, while Indonesia recorded an increase.

**Overall**, global exports of processed and canned tuna reached 1.336 million MT in the first nine months of 2025, while total imports climbed to 1.317 million MT. Despite emerging trade barriers in key markets, strong demand for both ready-to-eat products and semi-processed raw materials continues to underpin growth in the global processed tuna sector.

Global Exports and Imports of Processed and Canned Tuna (HS code: 160414), January–September 2021–2025, (in 1000 MT)											
Origin	Exports					Destination	Imports				
	2021	2022	2023	2024	2025		2021	2022	2023	2024	2025
Thailand	343.19	385.87	324.60	426.40	420.32	EU-27	362.44	355.15	345.87	371.75	426.74
Ecuador	199.18	192.79	169.56	226.47	254.75	USA	155.67	177.05	162.27	163.92	181.55
China	96.24	104.88	94.30	152.81	137.45	UK	71.55	73.32	66.00	72.79	80.28
Spain	74.62	75.30	83.03	87.36	90.97	Thailand	29.22	45.50	43.40	56.23	58.42
Philippines	73.63	72.88	61.50	85.35	73.86	Japan	49.39	52.39	54.19	51.77	51.99
Indonesia	48.29	52.14	51.74	57.60	61.64	Australia	29.94	37.91	29.15	35.36	33.09
NLD	57.16	57.17	40.04	39.23	41.88	Egypt	55.52	60.28	7.33	17.05	31.99
Mauritius	35.28	36.02	37.59	37.06	37.08	Colombia	31.24	26.26	22.81	23.72	28.84
<b>World total incld. others</b>	<b>1119.03</b>	<b>1227.28</b>	<b>1056.36</b>	<b>1326.80</b>	<b>1335.60</b>	<b>World Total incld. others</b>	<b>1165.49</b>	<b>1192.66</b>	<b>1083.82</b>	<b>1170.49</b>	<b>1317</b>

Source: Global Track Tracker

PRODUCT & FORM		GRADING	INDICATIVE PRICE in US\$/Carton if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN
TUNA in Brine	Chunk	150 gm	MYR 7.70/can	= 1.86	Retail trade, Kuala Lumpur, Malaysia	Thailand
	Flakes	150 gm	MYR 7.70/can	= 1.86		
	Solid	150 gm	MYR 6.60/can	= 1.61		
Tuna salad in mayonnaise	Flakes	150 gm	MYR 6.40/can	= 1.56		
TUNA in Sunflower oil	Chunk	150 gm	MYR 6.60/can	= 1.61		
TUNA in Olive oil	Chunk	150 gm x 24/carton	MYR 7.70/can	= 1.88		
TUNA with lemon and pepper	Chunk	150 gm/can	MYR 6.40/can	= 1.56		
TUNA in Mexican style	Chunk	150 gm/can	MYR 6.60/can	= 1.61		
Chili TUNA		160 gm/can	MYR 7.70/can	+ 1.88		
TUNA in pasta sauce,	Shoyu	165 gm	MYR 16.50/can	+ 4.03		
TUNA in vegetable oil	Flake	150 gm	MYR 7.20/can	= 1.76		

INFOFISH Trade News, No. 12/2025 22 December 2025		CANNED FISH			1US\$ = MYR 4.09	
PRODUCT & FORM	GRADING	INDICATIVE PRICE in US\$/Carton if not otherwise stated		PRICE REFERENCE & MARKET AREA	ORIGIN	
TUNA in Soyabean oil	Chunk	1.85 x 6, Catering pack	MYR 315.00/can =	77.02	Catering trade, Kuala Lumpur, Malaysia	Thailand
	Flakes	1.85 x 6, Catering pack	MYR 230.00/can =	56.23		
TUNA in oil	solid	48 x 170 gm, easy open		41.55 +	cfr Aguas Calientes	Mexico
TUNA in water	solid	24 x 170 gm		40.14 -	Wholesale, Tijuana Mexico	
TUNA in olive oil	solid	24 x 170 gm		49.23 +		
SARDINE in tomato sauce		Whole box can, 24 x 245 gm		38.40 +	cfr Aguas Calientes	
SARDINE in extra virgin olive oil		120 gm, oval	MYR 6.90/can =	1.69	Retail trade, Kuala Lumpur, Malaysia	Malaysia
SARDINE in Olive oil		75 gm/pack	MYR 23.90/can =	5.84		Portugal
SARDINE in Curry		425 gm, tall	MYR 9.15/can =	2.24		
SARDINE in Tomato sauce		280 gm, tall	MYR 7.10/can -	1.74		Malaysia
		425 gm, tall	MYR 5.90/can -	1.44		
SARDINE in oil <i>Chupea pilchardus</i>		24 x 425 gm		51.29 +	cfr Zacatecas Mexico	Mexico
MACKEREL fillets in extra virgin olive oil (North-sea mackerel)		125 gm, oval	MYR 10.90/can +	2.67	Retail trade, Kuala Lumpur, Malaysia	Scotland, UK
MACKEREL, fried, in chili sauce		155 gm, tall	MYR 8.59/can +	2.10		Malaysia
MACKEREL, fried with salted beans		227 gm, tall	MYR 7.41/can =	1.81		China
MACKEREL, Saba, in Chille		160 gm/pack	MYR 7.68/can =	1.88		
SALMON, Salad Spread		180 gm/round	MYR 6.83/can =	1.67		Portugal

## Global Fish Economy

### *Global trade faces economic and trade policy headwinds*

Global macroeconomic indicators improved in early 2025 but have since taken a cooler outlook. In its April World Economic Outlook, the International Monetary Fund lowered its baseline forecast for world growth in 2025 to 2.8 percent, citing newly announced tariff measures and the persistence of above-target inflation in several advanced economies. This points to prolonged tight monetary policy in major economies and continued weak consumer spending.

For 2025, total output from capture fisheries and aquaculture is expected to reach 196.6 million tonnes, a year-on-year increase of 1.5 percent. This growth continues to come almost entirely from aquaculture, which is forecast to reach 104 million tonnes (an increase of 2.6 percent), while wild harvests are projected to increase by 0.3 percent in volume to 92.6 million tonnes. Quota cuts for Barents Sea cod and western Mediterranean hake are expected to offset larger Alaska pollock and Argentine *Illex* squid catches. Although the fishmeal supply has stabilized after strong catches of Peruvian anchoveta, fish oil supplies remain tight.

Trade policies remain a major concern for the fisheries and aquaculture industry due to the dynamic international trade landscape, which creates challenges for business continuity. In April 2025, the United States of America introduced a universal 10 percent ad-valorem duty on all goods entering the country, with provisions for markedly higher rates on selected partners and commodities. Customs authorities began collecting the baseline surcharge on 5 April, and a schedule of country-specific increases is due to follow, although currently many rate rises have been put on hold. Major trading partners have already signalled retaliation. The World Trade Organization consequently revised its 2025 merchandise-trade projection from modest expansion to a 0.2 percent contraction, its weakest outlook since the COVID-19 pandemic.

Global trade in aquatic products is projected to edge up to USD 183.8 billion (a 1.7 percent increase), accompanied by a 0.5 percent rise in volume, which represents an effectively flat trade scenario. The gentle real-term contraction in trade of aquatic animal products that began in late 2022 is expected to extend into its third consecutive year, with retail behaviour surveys in the European Union and the United States pointing to the prolonged period of inflation between 2021 and 2023 as the main factor that is continuing to put a dent in consumer confidence, and thus trade.

The FAO Fish Price Index averaged 117.6 points over the first four months of the year, broadly unchanged from the same period in 2024. Prices for capture-fishery species have softened slightly as inventories normalize, whereas farmed-product quotations have firmed.

*Source: FAO Globefish Highlights No, 2/2025*

# BUSINESS OPPORTUNITIES

## EVENTS

### SAUDI ARABIA

**SAUDI INTERNATIONAL MARINE EXHIBITION**  
26-28 January 2026  
Riyadh, Saudi Arabia  
Website: <https://www.simec-expo.com/en>

### VIETNAM

**VIETSHRIMP ASIA & AQUACULTURE VIETNAM**  
11-13 March 2026  
Ho Chi Minh, Vietnam  
Website: <https://www.aquafishesexpo.com/en/>

### INDIA

**WORLD SEAFOOD CONGRESS (WSC)**  
9-11 February 2026  
Chennai, India  
Website: <https://www.wsc2026.com/>

### USA

**SEAFOOD EXPO NORTH AMERICA**  
15-17 March 2026  
Boston, USA  
Website: <https://www.seafoodexpo.com/north-america/>

### GERMANY


**FISH INTERNATIONAL 2026**  
22-24 February 2026  
Bremen, Germany  
Website: <https://fishinternational.de/en/>

### SPAIN

**SEAFOOD EXPO GLOBAL**  
21-23 April 2026  
Barcelona, Spain  
Website: <https://www.seafoodexpo.com/global/>

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“Strengthening Value Chain Synergies, Blue Economies and Sustainability across the Global Tuna Industry”

# TUNA2026

**7-9 SEPTEMBER 2026**  
*Shangri-La Hotel, Bangkok, Thailand*

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