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Vietnamese tilapia enters Japan's sushi market as exporters seek higher value

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Rising Japanese demand and a September surge in Saudi shipments are encouraging exporters to diversify beyond conventional mass-market sales



Vietnam's tilapia export industry is gaining momentum in new and established markets, with shipments to Saudi Arabia surging in September and growing acceptance in Japan opening potential opportunities in higher-value seafood segments. Exports of Vietnamese tilapia reached $13 million in September, an increase of 86 per cent year-on-year, according to the Vietnam Association of Seafood Exporters and Producers (VASEP). Cumulative export earnings for the first nine months of 2026 rose 47 per cent to $104 million compared with the same period last year.

Brazil remained the largest destination for Vietnamese tilapia, while the United States and Saudi Arabia presented contrasting demand trends.

Saudi Arabia Emerges as a Growth Market

Saudi Arabia is becoming an increasingly important destination for Vietnamese tilapia exporters. Shipments to the Middle Eastern market reached $10 million during the January–September period, up 50 per cent year-on-year. Growth accelerated in September, when exports surged 231 per cent to $3 million compared with the same month in 2025. The increase highlights the market's growing importance as Vietnamese suppliers seek to diversify their export destinations.

The expansion also reflects an opportunity to build demand for tilapia as an affordable fish in international markets. However, sustaining the gains will depend on repeat orders, competitive pricing and the ability of exporters to maintain consistent product quality and supply.

US Demand Shows Signs of Recovery

The United States remained Vietnam's second-largest tilapia export market, with imports worth $25 million during the first nine months of 2026. However, this represented a 42 per cent decline from the corresponding period last year. September brought some improvement, with shipments rising 37 per cent year-on-year to $4 million, nearly double the August figure.

VASEP cautioned that the recovery remains uncertain because US import demand continues to depend heavily on existing inventory levels. The latest increase, therefore, does not yet establish a sustained turnaround in the market. For Vietnamese exporters, the divergent performance across destinations reinforces the importance of diversifying sales channels rather than relying on a single major market.

Japanese Market Opens a Higher-Value Opportunity

Japan is emerging as another promising destination. Vietnamese tilapia exports to the market increased 74 per cent in the first nine months of 2026, according to VASEP. A particularly significant development is the entry of Vietnamese brackish-water tilapia into Japan's sushi and sashimi segment, where product quality, handling and preparation are critical to market acceptance.

The move could help Vietnamese suppliers expand beyond conventional mass-market sales and explore higher-value applications for the fish. Rather than competing primarily on price, exporters may be able to differentiate their products through quality assurance, processing standards and specialised market positioning.

Success in Japan could also offer a pathway into other markets where seafood buyers demand stringent quality standards. However, converting this initial market presence into sustained growth will require consistent product performance and reliable supply chains.

Diversification and Product Differentiation Become Priorities

The latest export performance points to expanding opportunities for Vietnamese tilapia across the Middle East, Asia and established Western markets. Saudi Arabia's rapid growth and Japan's emerging premium-segment demand offer two distinct routes for expansion, while the US market illustrates the risks associated with inventory-driven demand.

VASEP has stressed the need for exporters to broaden their market reach and strengthen competitiveness through product differentiation, quality and services. For the industry, the next challenge is to translate short-term export growth into durable commercial relationships. Consistent quality, dependable supply, market-specific product development and a wider destination mix will be critical to sustaining Vietnam's tilapia export momentum.