

Global Tilapia Market Brief — H2 2026

Supply Rebalancing, Rising Raw-Material Prices and Sourcing Strategy for B2B Buyers

1. Executive Summary

Chinese farm-gate tilapia prices turned upward in August 2026 (week 33: +0.20 CNY/kg for 300-500 g and 500-800 g fish in Guangdong and Guangxi) as reduced stocking through 2025-2026 finally tightened supply of market-size fish. China's national supply and demand balance (March 2026 official report) projects total production of 2.048 million tonnes in 2026 against exports of 1.148 million tonnes — an export share of 63.01% — while ending stocks fall 48.9% to 106,400 tonnes. Maoming, China's tilapia capital, shipped 74,000 tonnes in H1 2026, up 51.8% year-on-year. For importers, the window for booking H2 2026 and Q1 2027 contracts at current price levels is narrowing.

2. China Tilapia Supply-Demand Balance (Official Projection)

Indicator	2025 (est.)	2026 (proj.)	Change	Source
Total production	2,109,700 t	2,048,300 t	-2.9%	China fisheries authorities, Mar 2026
Exports	1,100,000 t	1,148,300 t	+4.4%	China fisheries authorities
Export share of production	56.74%	63.01%	+6.3 pp	China fisheries authorities
Ending stocks	208,400 t	106,400 t	-48.9%	China fisheries authorities
Maoming exports (H1 2026)	48,700 t (H1 25)	74,000 t	+51.8%	Zhanjiang Customs / GACC, Aug 2026
Avg. wholesale price	~16,720 CNY/t	rising since Jul 2026		Industry price surveys, week 33 2026

3. NEGUPGROUP Core Frozen Tilapia & Pangasius Specifications

Product	Size / Grade	Packaging	Freezing	Certifications
Frozen Tilapia Whole Round	200-300 g / 300-500 g / 500-800 g	10-15 kg / carton	Block frozen	HACCP, Halal, BAP
Frozen Tilapia Gutted (2-cut / Dressed)	300-500 g / 500-800 g / 800-1000 g	10 kg / carton	Block frozen	HACCP, Halal, BAP
Frozen Tilapia Fillet, skin-on	3-5 oz / 5-7 oz	10 kg / carton	IQF	HACCP, Halal, BAP
Frozen Tilapia Fillet, skinless	3-5 oz / 5-7 oz	10 kg / carton	IQF	HACCP, Halal, BAP
Frozen Pangasius Fillet, well-trimmed	3-5 oz	10 kg / carton	IQF	HACCP, Halal

MOQ: 1 x 40 ft reefer container (approx. 26-27 MT). Samples available within 7 working days. Retail bags, IQF vacuum-skin and master-carton private labels on request.

4. What This Means for Importers

- Lock H2 2026 volume now: China ending stocks are projected to halve; frozen fillet and whole-fish offers are re-pricing upward as processors pass raw-material costs downstream.
- Diversify corridors: US Section 301 measures (an additional 12.5% announced 24 July 2026) keep the China-US corridor volatile — Mexico, Canada, EU, Middle East, Africa and Latin America remain tariff-efficient destinations.

- Verify traceability: Maoming's digital 'Yu Sheng Shi' system cut customs documentation time by 80% — source from plants with digitised farm-to-plant traceability to avoid clearance delays.
- Watch Vietnam as a second origin: Vietnamese tilapia exports reached USD 35 million in Q1 2026 (+190% YoY), adding a credible alternative for whitefish buyers.

5. About NEGUPGROUP Seafood

NEGUPGROUP exports frozen tilapia (whole round, gutted/dressed, IQF and block-frozen fillets), frozen pangasius fillets and value-added seafood products to more than 30 markets across North America, the EU, the Middle East, Africa and Latin America. Factory-partner capacity exceeds 60,000 tonnes per year with HACCP, Halal and BAP certified lines, full cold-chain control (-18°C to core) and pre-shipment inspection on every lot.

Sources: China national tilapia supply & demand report (Mar 2026); Zhanjiang Customs / GACC (Aug 2026); Seafood Media Group / FIS (Apr & Aug 2026); VASEP; Vietnam News Agency (Aug 2026); Cepea (Brazil, Aug 2026).