Indonesia Market Summary & Category Data for Fish & Seafood - Abalone

January 2024

Seafood Industry Australia
The Voice of Australian Seafood

GREAT AUSTRALIAN SEAFOOD

About Seafood Industry Australia

Seafood Industry Australia (SIA) is the national peak-body representing the Australian seafood industry as a whole. With members from the wildcatch, aquaculture and post-harvest sectors of the Australian seafood industry, we are the voice of Australian seafood.

SIA provides consumers, Government and other stakeholders with confident and united representation. Our unity indicates that we love what we do, we stand by our products and that those products are the best in the world.

SIA provides services identified through a process involving member input to fill a critical gap that currently exists, to have more influence on Government decisions, to act as a national industry voice, to be a marketing and communications hub, and to remove obstacles to growth standing in the way of the Australian seafood industry.

Our vision is for the Australian seafood industry to be United, Effective and Respected.

Our mission is to Promote, Protect and Develop the Australian seafood industry on the national and international level.

Agricultural Trade and Market Access Cooperation (ATMAC) Program

The ATMAC program is an Australian Government initiative, expanding trade in Australian agricultural, forestry and fisheries sectors into emerging export markets and/or export markets with high-growth potential. This will be achieved through support for diversification efforts that align with industry priorities.

Seafood Industry Australia's 'marketing, market access and export development for the Australian seafood industry' was funded under the ATMAC Program.

Economic Indicators

- GDP (USD): **$3.589 trillion** as of December 2023.
- GDP Per Capita (USD): **$5,510** as of December 2023.
- Currency: **Indonesian Rupiah** (IDR).
- Exchange Rate: **1 IDR = 0.000097 AUD** (01/02/24).
- Mercer's 2023 Quality of Living Ranking: Indonesia's only ranking city is **Jakarta at 148.**
- Human Development Index: **0.705** and ranked **114th** as of 2021.
- Logistics Performance Index: **3.00** and ranked **61st** globally as of 2023.

Source: Trading Economics, World Bank, Mercer

- **Trade Agreements:**
  - Indonesia is part of 2336 Bilateral Investment Treaties (BITs) in force.
  - Indonesia is also a part of the Australia - Indonesia CEPA Agreement, and the ASEAN-Australia-New Zealand Free Trade Area.
  - Indonesia is a member country of the 2020 Regional Comprehensive Economic Partnership (RECP) alongside Australia and several other countries. However, the RECP is not in force yet.

Source: https://investmentpolicy.unctad.org/country-navigator

Demographic Indicators

- Total Population: Approximately **278.87 million** as of January 2024.
- Expatriate Population: Approximately **350,000** as of 2022 as per the Indonesian Statistics Agency.
- Population Growth: **0.74%** as of 2023.
- Median Age: Approximately **30.20** years old.
- Urban Population: **58.6%** as of 2023.
- **Population Ethnicity:**
  - Native Indonesian 80.05%
  - Malay 3.7%
  - Chinese 1.2%
  - Other 15.05%
- **Dominant Religious Groups:**
  - 86.7% Islam
  - 10.72% Christian
  - 1.74% Hindu
  - 0.84% Other

Source: Trading Economics, World Bank, Statistics Body for individual countries

Consumer Behaviour & Societal Trends

Key Trends:

- Sustainability is a key priority for Indonesians, especially among the country's Millennial population who are focused on buying eco- or ethically-conscious products and brands who promote transparency and ethics.
  - Living close to the sea, Indonesians are aware of the risks caused by climate change, and this is hence reflected in their purchasing habits, with key priorities including reducing plastic use, recycling and reducing food waste.
- Prior to the pandemic, Indonesians regularly socialised with family and friends at home, and are expected to return to this activity as restrictions have eased significantly in 2021 and 2022.
- Consumers look for healthy ingredients when selecting food and beverages. Common health behaviours include using herbal remedies to alleviate stress, and making use of digital apps to track health and fitness. Many also take health vitamins and supplements daily or weekly.
- Indonesians tend to cook and bake at home on a smaller scale than the global average, however home delivery and takeaway double global figures. Many consumers, especially Millennials, attribute this to a lack of time to cook. Reheating and preparing ready meals is also common.
- Indonesian consumers are tech-savvy, enabling the country's e-commerce market to become highly well-established. A large proportion of consumers purchase items with their mobile phones at least weekly, a behaviour which increased with the pandemic, and over half have stated that they're influenced by the social media posts created by a brand or company they purchase from.
- Despite the growing importance of e-commerce, consumers highly value in-store shopping, which was one of the country's top leisure activities pre-pandemic. Consumers are expected to be keen to return to stores, especially seeking out stores that offer engaging experiences.
- Key purchasing factors unique to Indonesia include convenience and the ability to try new products, with both factors significantly bypassing global averages.

- When deciding on which products to purchase, consumers place most trust in friend and family recommendations, followed by independent consumer reviews, brand or company websites and product labels or other information displayed on product packaging.

- Consumers value experiences over tangible products. They desire, authentic, personalised experiences that suit their tastes and lifestyles, as well as those activities that appeal to all of the senses. This encourages brands to create value-added experiences.

- The longer-term trend of consistent economic growth in Indonesia has expanded the middle-class consumer segment, which has driven demand for a greater range of higher-quality goods and services. Consumers are also optimistic about their financial future, supporting quality purchases. Indonesia's affluent urban populations are driving the trend for more premium products.

- When it comes to buying food and beverage products, consumers are willing to pay more for specialty or new products, value for money, eco-friendly brands, non-GMO products, all-natural products, those with health/nutritional claims and those sold by a strong or well-known brand.

- While COVID-19 promoted the 'shop local' trend, Indonesians remain curious about trying international products as a way to immerse themselves in different global cultures.

Source: Santandertrade, OECD, Deloitte, BIGCOMMERCE, McKinsey, Google Market Finder, SMARTERCX

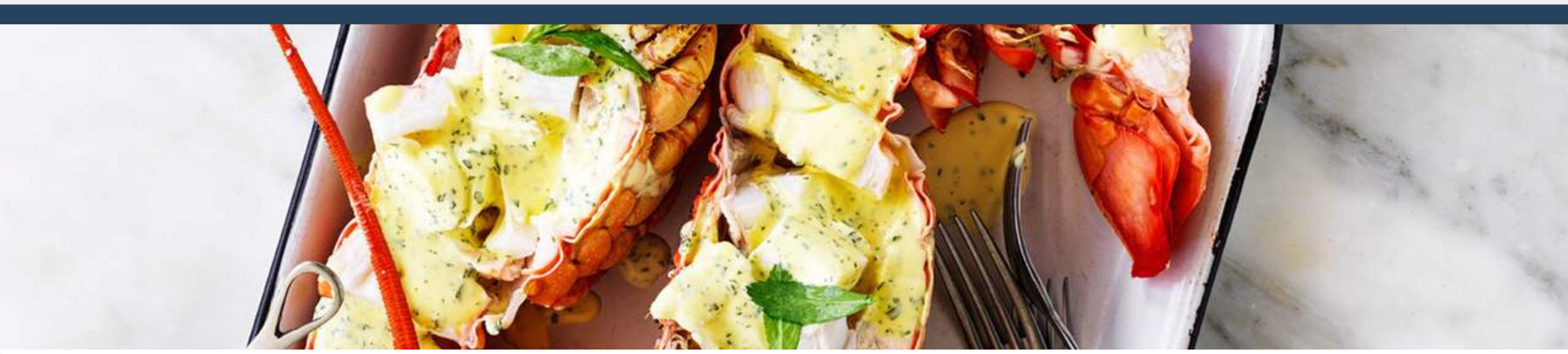
Digital Adoption:

- Indonesians spend just over 8 and a half hours a day on the internet, approximately 3 hours and 17 minutes of which is dedicated to social media usage.

- There are an estimated 191.4 million active social media users in Indonesia with an approximate 68.9% penetration.

- Indonesia's most visited websites include Google, YouTube, Detik and Facebook.

Source: Digital in 2022 Report



Grocery Retail Channel Developments

Key Trends:

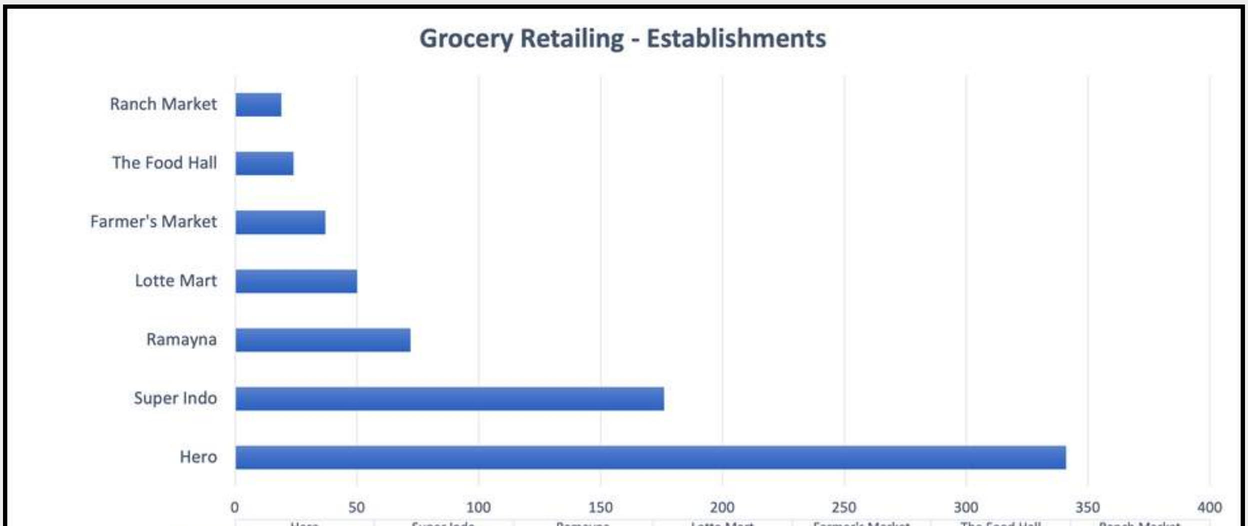
- The retail value sales of supermarkets fell 8% in 2021 but are expected to grow strongly at a current value CAGR of 13% to 2026.
  - However, visits to supermarkets in standalone locations remained high due to their proximity to residential areas.
  - Meanwhile, hypermarkets saw low visitation as they're typically located far from consumers' homes and consumers sought to minimise travel due to COVID-19. This trend is expected to continue through to 2026.
  - In some outlets, sales of fresh products such as fruit and vegetables are rising as consumers avoid going to traditional markets.
- Traditional stalls and grocery stores remain very common channels to shop at, driving a large portion of the economy and supporting the livelihoods of low to middle income consumers. Government assistance programs have allowed these stalls to continue operating.
- Indonesian supermarkets and hypermarkets share many similarities, as both are classed as large modern grocery retail channels. Both are usually found in shopping centres. In the past, supermarkets were often subject to limited growth due to dynamic consumption trends and patterns, as well as being caught between convenience stores and hypermarkets.
- While outlet expansion continues to be viewed as a crucial component for success for modern grocery retail operators, it is becoming increasingly clear that an adequate stocking of basic essential goods is sufficient to attract consumers, thus negating the need to operate huge stores.
- While supermarkets traditionally only served upper-middle and high-income consumers, but COVID-19 has expanded sales to lower income groups.
- In 2021, Alfamart remained the market leader in the convenience store channel. The success of the brand lies mainly in its ability to offer stable prices and extensive variety, while offering promotional low prices on the weekend.

- In April 2021, Alfamidi and Indomaret announced a partnership with ShopeePay, an e-commerce platform with an established digital payment system. This was launched in Ramadan 2021, which is a busy shopping season. Consumers were able to take advantage of cashback offers among other promotional deals.

- To retain their customer base, supermarkets are expected to focus on outlets close to residential areas, offer a higher variety of high-quality, fresh products, and cater to middle to upper income consumers. Promotions and complementary services will also be important to cater to a wider variety of consumers, especially the low to middle income segment, such as free fish grilling.

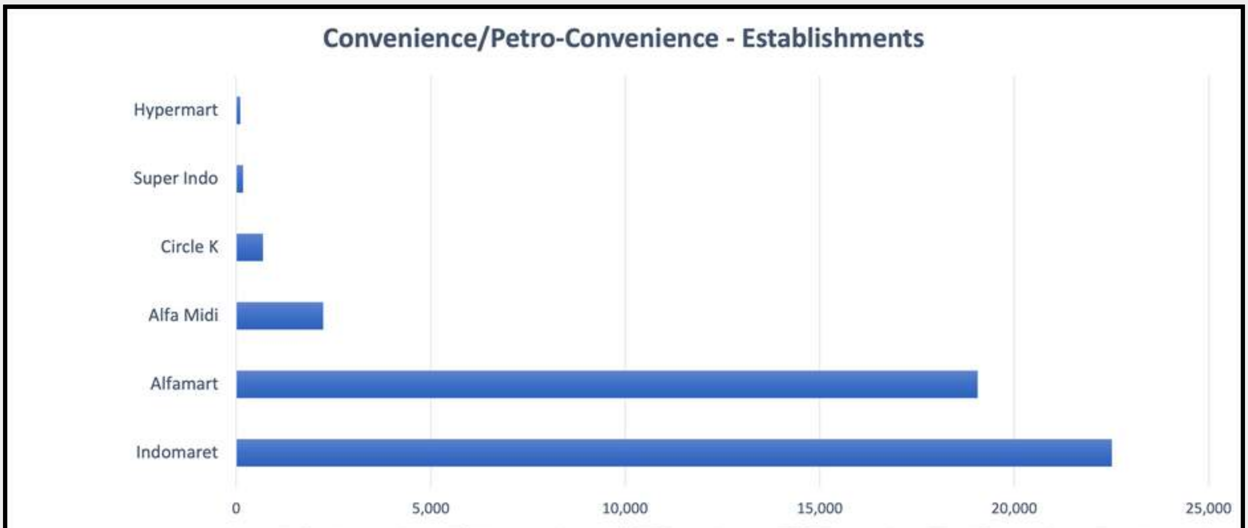
- Despite the overall shift to e-commerce, many consumers prefer to shop for groceries in-store.

Grocery Retailing Brand Outlets:



	Hero	Super Indo	Ramayna	Lotte Mart	Farmer's Market	The Food Hall	Ranch Market
Outlets	341	176	72	50	37	24	19

Convenience/Petro-Convenience Brand Outlets:



	Indomaret	Alfamart	Alfa Midi	Circle K	Super Indo	Hypermart
Outlets	22,515	19,057	2,234	685	176	100

Source: Euromonitor, Phoenix Business Journal, NFCW

Foodservice Channel Developments

Key Trends:

- COVID-19 saw declines in both value sales and outlet numbers for foodservice operators, especially independent establishments. These figures continued to post negative growth in 2021, the decline was less significant than in 2020. This was driven by reduced purchasing power and continued lockdowns, especially mid-year, when takeaways and home deliveries increased yet failed to fully compensate for lost dine-in sales.

- The spike in demand for delivery services was driven by lockdowns, yet also the increased consumer demand for convenience and the rising availability of third party food delivery apps which use promotions, discounts and cashback offers to attract consumers. Last mile apps Grab and Gojek saw increasing sales, encouraging new players such as Shopee to enter the takeaway/delivery market.

- Lower-income consumers were more financially affected than those with higher-incomes, who mostly drove foodservice sales in 2021. This saw players targeting the low-income segment perform especially poorly, such as food-based street stalls/kiosks.

- All players, but especially full-service restaurants, began offering grocery bundles alongside their typical restaurant business, allowing consumers to cook their favourite dishes at home by following professional instructions created by chefs.

- Chained specialist coffee shows posted high outlet growth in 2021, as visiting such outlets has become a major trend across mid-to-high-income consumers, especially young people as they offer socialisation and a place to work remotely.

- The culinary trend is shifting to suburban locations with fresh air and views, with many cafes, coffee shops and independent outlets using location to attract clients.

- As consumers have become more price-sensitive, they sought lower-priced menus and sought value, leading them to favour bulk orders and leading industry players to offer promotions for high-volume orders through third-party delivery apps.

- Players diversified their operations in 2021, creating takeaway service counters roadside and setting up temporary booths, and even using door-to-door tactics.

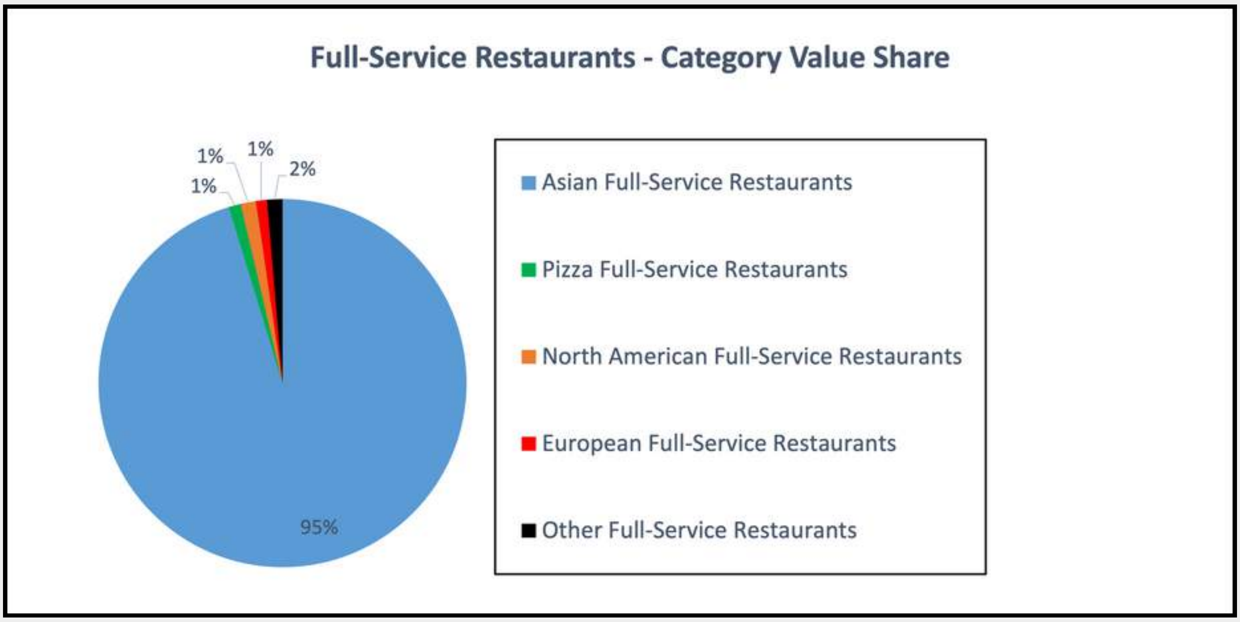
- Fast Food Indonesia is the leading foodservice player as of 2021, supported by a strong online presence.

- Indonesia's foodservice environment is dominated by independent foodservice players, however they fared worse than chained players due to their more limited delivery options. Given third-party apps typically require a margin of 20%, many independent operators offered in-house delivery.

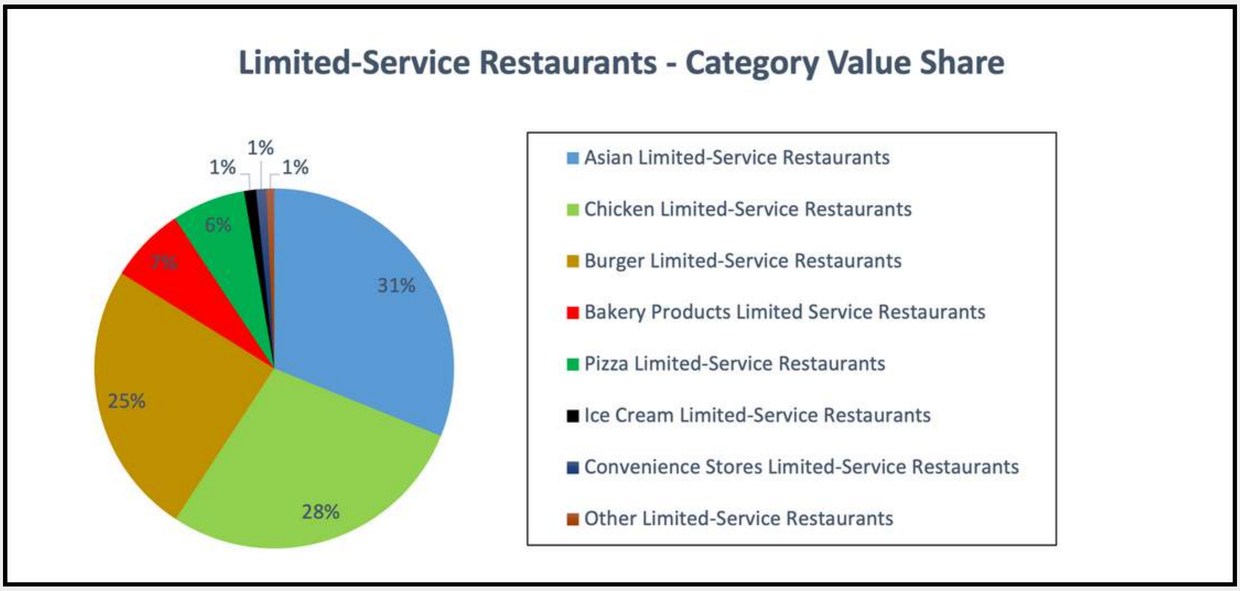
- As pandemic restrictions have lifted, consumers want to socialise yet avoid high-traffic areas, and this has driven demand for stand-alone, suburban independent restaurants.

- Foodservice sales will return to pre-pandemic levels by 2025 as Indonesia recovers economically, with players focusing on safety, hygiene and quality improvements to attract consumers, while also taking advantage of the continued growth of delivery services to maximise their sales.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor, Huffington Post, WARC, National Restaurant Association

Food & Drink e-Commerce Channel Developments

Key Trends:

- The switch from physical store shopping to online shopping, generally using smartphones, remains a key trend.
    - Changes in shopping patterns have benefitted e-commerce performance, with major players such as Tokopedia, Bukalapak and Shopee expanding in the grocery segment with discounts and promotions to encourage online shopping.
    - Increasingly, small businesses are selling products online via platforms such as WhatsApp and Instagram, using these platforms to approach consumers.
- The switch from physical store shopping to online shopping, generally using smartphones, remains a key trend.
- Despite the shift towards e-commerce in 2020, groceries remain a product category where consumers still prefer to visit physical outlets, especially when it comes to buying fresh products.
- Although, during the forecast period, it is expected that online shopping of food and drink products will continue to rise in popularity. With the pandemic causing a shift to online shopping, the consumer base for e-commerce websites has become significantly larger, going beyond the original core target base.
    - This rise in popularity has been supported by the channel's assurance of reliability as well as the overall convenience offered by the channel.
- The constant improvements being made to improve infrastructure and logistical capabilities, including cold chain capacities, are expected to offer several advantages to the food and beverage e-commerce sector during the forecast period. This is especially since the perishability of produce and grocery products is one of the biggest obstacles in the further development of food and drink e-commerce.
    - Improvements made to the logistical capabilities of the overall e-commerce sector will also mean shorter delivery times and cheaper shipping costs. This is expected to drive more impulse purchases of food and drink products.

Key E-tailers:

- Happy Fresh, an online grocery retailer, has collaborated with traditional grocery retailers such as Giant, Lotte Mart and Ranch Market. Happy Fresh offers its customers the option to pay with cash via Grab, or through credit card.

- GrabMart is an initiative introduced by transportation services provider Grab, that gives customers the option to have their groceries home delivered through Grab's logistical services.

- Another key food and beverage e-tailer in Indonesia is RanchMarket, which primarily targets the upper and upper-middle classes. RanchMarket stocks premium quality products, with distinct features and health/lifestyle benefits, in addition to organic, gluten-free, and dietary products.

- Conventional grocery retailers like supermarkets are also launching their own online services in addition to their physical stores. As an example, Hypermart gives customers the option to shop in-store or online with on-demand delivery.

Source: Euromonitor, Department of Commerce, Digital Commerce 360, Grocery Dive

Seafood Consumption in Indonesia

- Fish and seafood supply per person in Indonesia is valued at 44.67 kg as of 2017 according to the United Nations Food and Agricultural Organization (FAO).
    - *Food supply is defined as food available for human consumption. At country level, it is calculated as the food remaining for human use after deduction of all non-food utilizations*

Source: FAO, 2021

Market Access Requirements

Key Regulators:

- Ministry of Finance (MOF): Responsible for managing Indonesia's finance and all state assets. They handle financial policies, such as the imposition of import tax.
- Ministry of Agriculture (MOA): Supervises agricultural development. Their responsibilities include regulating and checking produce, and also issuing certification related to irradiated, organic, and semi-processed imports.
- National Agency of Drugs & Food Control (BPOM): The BPOM primary responsibility is to protect public health through the enforcement of food safety, pharmaceuticals, and other consumables. Enforces laws and procedures to ensure adherence of all foods with set health standards.
- National Standardization Agency (BSN): Manages all standardization, conformity assessment, and metrology activities in Indonesia. The BSN's chief objective is to construct Indonesian National Standards (SNIs) to which all food products and produce are subject to testing and certification.

Product Registration/Import Procedure:

- Based on the category of food and beverage import, the importer must obtain the necessary licenses and permits for their product to enter Indonesia. A complete list of essential licenses may be found on the Ministry of Trade (MOT)'s "INATRADE" System. This system can be accessed by importers after they have registered with the MOT.
- The next step is for the importer to obtain an import recommendation from the BPOM/MOI and MOA. After the import recommendation is secured, the importer must procure an import permit from MOT.
- A pre-shipment inspection is conducted for certain categories of imported products in the country of origin. If successful and approved, the products are shipped to Indonesia, where the imports are checked against technical measures (SPS & TBT). Further tests are carried out to verify and approve the SKI, and other import certificates. On completion, customs clearance takes place.

Documentation Required:

- Various certification as required for any irradiated, organic, and semi-processed plant imports; other licenses and certificates may also be required.
- Commercial invoice signed by manufacturer or supplier.
- Bill of lading
- Packing list
- Import permit (SKI) from BPOM.
- Customs import declaration.

General Labelling Requirements:

- All information must be in Indonesian language (Bahasa), Arab Numeric and Roman text, unless no equivalent term exists. All labels must indicate if a food is irradiated, organic, contains GMOs, or other warnings. Preparation and storage instructions, and the intended user must also be displayed.
- Name of the product
- Ingredients list
- Net weight or net volume
- Name and address of manufacture or importer
- Halal logo (if applicable)
- Date and/or production codes
- Expiry date: Following "day, month, year" format (labelled as "best before" unless for wine, beverages with alcoholic content, >10% vinegar, sucrose and bread/cake with shelf life <24 hours).
- BPOM Registration Number (ML for imports, MD for domestic products)
- Source of certain foodstuffs
- 2D Barcode - for all processed food (excluding special nutrition food) that has obtained a BPOM registration number after December 7, 2018.
- Nutrition Label - for all processed foods excl. powder tea and coffee, tea bags, bottled mineral water, herbs, spices, spices, seasoning, alcoholic beverages, and condiments.
- SNI mark (SPPT-SNI affixation) for food products required to comply with SNI requirements.

Packaging Requirements:

- Any packaging that is produced using banned materials or which may have the potential to release harmful contaminants is strictly forbidden. These may include the following but are not limited to: active and smart food packages, adhesives, ceramics, Styrofoam, rubber and elastomer, and plastic.
- MOI has made it mandatory for all plastic packages to include a food grade logo and recycling codes.
- Product packaging must be biodegradable, using raw materials that are able to be recycled.
- Items that may react to heat and humidity must be treated to prevent damage and decay.

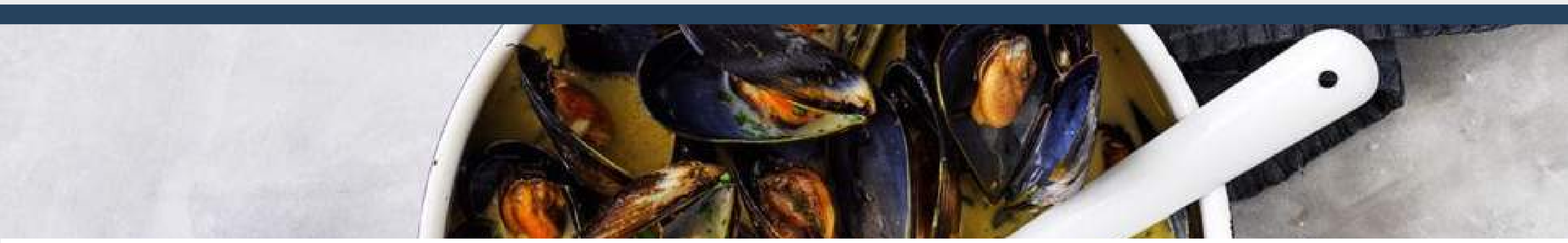
Non-Tariff Barriers:

- Genetically engineered foods are subject to further tests before their distribution. such products also require a Food Safety Certificate issued by BPOM.
- Food and beverage products must be halal-certified unless the products are non-halal.

Tariffs Levied:

- Depending on the type of product, Imported items generally attract duties in the range of 0 to 15 percent.
- 5-30 percent sales tax is levied on imports at the point of entry, barring 'essential' gooods.

Source: USDA Food and Agricultural Import Regulations and Standards Country Reports [FAIRS]



Category Data

Fish and Seafood in Indonesia

Key Trends:

- Fish is considered as one of the primary sources of animal protein and nutrition for many Indonesians, while also being s key source of livelihood and income.
- Indonesia's fish consumption is comparatively low when looking at other countries in the Southeast Asia region. In a bid to improve fish consumption and protein intake, the government launched the 'Gemarikan' program.
    - However, Indonesia maintains one of the highest levels of fisheries production in Southeast Asia, topping Vietnam, Myanmar, the Philippines, Thailand and Malaysia, with fish production greater than all of these countries combined.
- Indonesian consumers' fish consumption is dominated by fresh fish, which is reflected in its relatively inelastic demand. Fresh fish is desired by a majority of consumers at 76%, followed by processed products at 19%, and salted fish at 15%. However, regarding overall consumption, demand is elastic, with the rising price of fish negatively impacting consumption (yet to a limited extent).
- According to the Indonesian Ministry of Maritime Affairs and Fisheries, the species of fish most consumed in the country are catalans and tuna (16% approx.), processed fish (such as meatballs, sausages and nuggets)(9% approx.), catfish and cork (8% approx.), mackerel (6.5% approx.), milkfish (5.5% approx.), tilapia (5% approx.), shrimp and calamari (4% approx.) and anchovies (3.5% approx.).
- Fish consumption is highest in Maluku Province, Southeast Sulawesi, Riau Islands, North Maluku Province, West Papua Province and North Sulawesi Province. Meanwhile key growth provinces include Yogyakarta, West Nusa Tenggara, Central Jaka, Jakarta and East Java.
- Key challenges facing Indonesia's fishing industry today include a lack of feasible and well-managed fishing harbours, a weak capture fishery industry, a lack of high value-added products, as well as quality and safety issues.
- The fish and seafood production industry is highly fragmented, with the top two players generating just 1% of production value in 2021. Imports account for just 0.2% of total market size.

- The average volume of fish and seafood consumed per person annually is equivalent to 6.1kg in 2022, reflecting that consumption is steadily increasing. 2.8kg is the volume of processed fish and seafood consumed per person, a figure which is showing even stronger growth than overall.
    - Factors driving this low fish consumption include limited infrastructure to distribute quality fish, a preference for meat over fish, and the fact that certain seafoods like tuna, shrimp, crabs and octopus are often exported rather than sold domestically, leaving local consumers with access only to medium and low-quality seafoods.

- Indonesia's fisheries industry is committed to enhancing the sustainability of products on offer both domestically and for export, with the country committing to conserving the ocean by establishing 20 million hectares of Marine Protected Areas.

- Government is continuing with campaigns to improve fish consumption, such as the Communal Fish-Eating Festival at Raga Amp-at regency to improve public awareness of and interest in buying and eating fish.

- Indonesian cuisine includes a rich variety of seafood-based dishes. Popular dishes include Cakalang Fufu (made with cured and smoked skipjack tuna), Satay Udang (prawn satay), Udang Balado (stir-fried prawns), Sate Kerang (mussels satay), Kepiting Saus Padang (marinated crab), Arsik (stewed carp), Ikan Bakar (barbecued/grilled fish), Pecel Lele (deep-fried catfish) and Pempek (fish cake made with ground fish meat).

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
Indonesia	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	379.65	4.18
				2027	468.30	4.29
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	748.78	7.27
				2027	1,157.17	9.10
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	1,204.96	12.17
				2027	1,397.94	3.02
		Dried Fish & Seafood	Dried Fish & Seafood	2022	169.58	3.09
				2027	196.14	2.95
		Fresh Fish & Seafood (Counter)	Fish	2022	1,605.07	9.17
				2027	1,784.01	2.14
			Shellfish	2022	990.97	12.58
				2027	1,068.55	1.52
		Frozen Fish & Seafood	Frozen Processed Fish	2022	344.84	9.33
				2027	401.32	3.08
			Frozen Whole Cuts Of Fish & Seafood	2022	313.36	13.35
				2027	365.40	3.12

Source: GlobalData, 2024

ITC - Trade Data

Fresh or Chilled Abalone in Indonesia

Indonesia - Trade Data - HS Code 030781 Live, Fresh or Chilled Abalone (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	66	2	4	-1	19
1	Japan	62	2	5	0	19
2	Australia	3	0	-13	-	-
3	South Korea	1	0	-	-24	-
4	China	-	-	-	-	-
5	South Africa	-	-	-	-	-
6	New Zealand	-	-	-	-	-
7	Mexico	-	-	-	-	-
8	Chile	-	-	-	-	-
9	Hong Kong	-	-	-	-	-
10	Ecuador	-	-	-	-	-

AUS - Trade Data - HS Code 030781 Live, Fresh or Chilled Abalone (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	45,155	783	-7	-10	-8
1	China	36,640	583	-9	-11	-11
2	Hong Kong	3,968	85	-20	2	10
3	Japan	1,765	45	28	-14	-12
4	Vietnam	1,758	47	198	34	50
5	Singapore	427	7	1	44	41
6	Taiwan	419	12	22	-14	-10
7	Malaysia	72	2	424	2	19
8	United States	63	1	35	-23	-19
9	United Arab Emirates	17	0	-68	-	-
10	Canada	10	0	-93	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Abalone in Indonesia

Indonesia - Trade Data - HS Code 030783 Frozen Abalone (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	NO DATA AVAILABLE					
1						
2						
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5						
6						
7						
8						
9						
10						

AUS - Trade Data - HS Code 030783 Frozen Abalone (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	33,382	568	-13	8	14
1	Hong Kong	10,459	87	-12	-4	-2
2	United States	7,375	188	-7	45	54
3	China	6,695	75	-46	30	29
4	Japan	5,492	136	80	-6	-6
5	Canada	1,369	22	-21	4	8
6	The Netherlands	661	22	249	-	-
7	Vietnam	589	21	222	-2	30
8	Singapore	347	5	26	-21	-17
9	United Kingdom	254	7	-36	88	9
10	Thailand	69	4	-31	-10	14

Source: ITC Trade Map, 2023

ITC - Trade Data

Smoked, Frozen, Dried, Salted and In-Brine Abalone in Indonesia

Indonesia - Trade Data - HS Code 030787 Smoked, Frozen, Dried, Salted or In-Brine Abalone (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
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1						
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5	NO DATA AVAILABLE					
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8						
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10						

AUS - Trade Data - HS Code 030787 Smoked, Frozen, Dried, Salted or In-Brine Abalone (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-	World	14,868	264	-13	-2	-1
1	Hong Kong	4,085	47	35	-9	-18
2	Singapore	3,839	105	-21	-13	-6
3	United States	3,482	69	-18	118	117
4	China	2,379	6	-25	21	10
5	Vietnam	300	7	-23	52	0
6	United Kingdom	242	4	-	-31	19
7	Malaysia	180	3	-27	-18	-18
8	New Zealand	138	20	-33	-	81
9	Taiwan	133	1	-83	-18	-26
10	Macao	85	2	-48	-19	-13

Source: ITC Trade Map, 2023

FRDC - Trade Data

Abalone Exports - Value

AUS - Trade Data - Species: Abalone (Exports):

Value of Exports - Abalone

Commodity Description	Value
Live, fresh or chilled Abalone	$997,659,815
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	$891,603,155
Prepared or preserved abalone (excl. abalone of Chapter 03)	$742,932,322
Prepared or preserved abalone	$471,499,012
Frozen abalone meat	$370,150,485
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$291,371,852
Frozen abalone (Haliotis spp.), whether in shell or not	$258,609,638
Abalone, frozen, dried, salted or in brine (excl. frozen meat; frozen whole on shell; dried meat; whole parboiled; prepared or preserved of Chapter 16)	$230,529,347
Prepared or preserved abalone, in cans, bottles or the like	$227,255,281
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$144,203,394
Parboiled whole abalone	$84,260,192
Frozen whole abalone, on shell	$78,271,662
Dried abalone meat	$24,807,221

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	$2,153,572,141
China	$804,906,082
Japan	$704,194,796
Singapore	$520,512,395
Taiwan	$233,473,172
Vietnam	$137,949,117
United States of America	$133,997,692
Canada	$58,463,093
Malaysia	$40,795,200
United Kingdom	$7,610,451
Macau	$3,533,112
Thailand	$3,117,047
Netherlands	$2,307,647
Macau (SAR of China)	$1,705,265
France	$1,202,124

Leading Export Destinations - Value

State	Value
TAS	$1,944,557,689
VIC	$1,508,613,841
SA	$991,992,473
WA	$198,832,129
NSW	$113,735,266
QLD	$47,790,745
Foreign (re-export)	$7,497,910
NT	$133,323

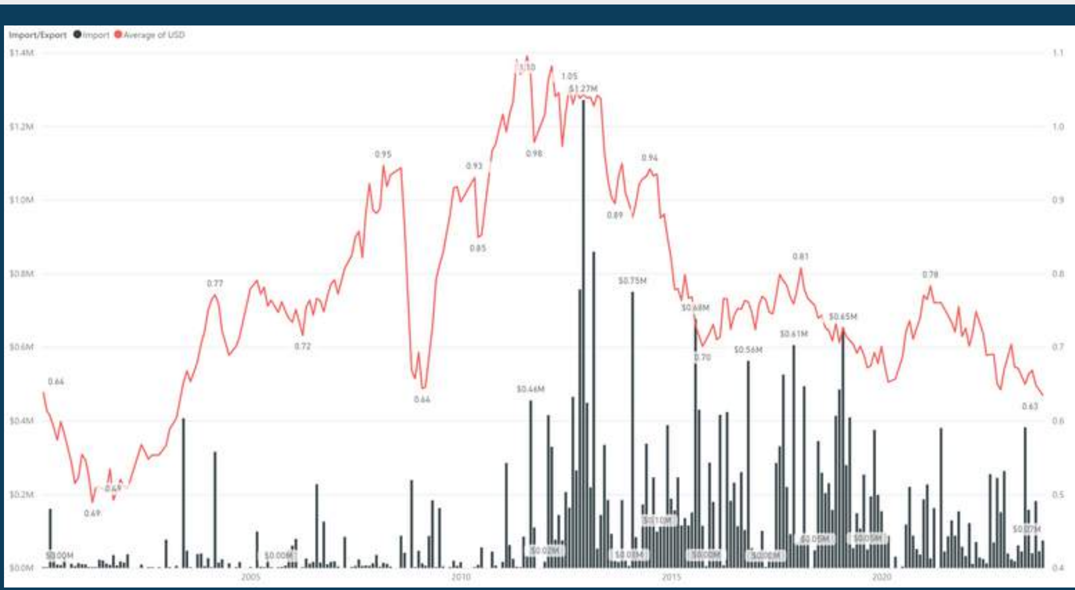
Export Value by State

Source: FRDC, 2023

FRDC - Trade Data

Abalone Imports - Value

AUS - Trade Data - Species: Abalone (Imports):



Value of Imports - Abalone

Commodity Description	Value
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	$13,578,075
Prepared or preserved abalone (excl. abalone of Chapter 03)	$8,378,272
Abalone, frozen, dried, salted or in brine	$4,650,393
Frozen abalone (Haliotis spp.), whether in shell or not	$2,525,619
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$1,489,162
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brin	$1,080,475

Value of Imports - Commodity Breakdown

Country	Value
New Zealand	$15,753,762
China	$6,698,415
Hong Kong	$2,248,834
Australia (Re-Imports)	$1,933,445
Australia	$933,803
Malaysia	$686,680
Morocco	$617,708
Chile	$564,306
Taiwan	$559,099
Japan	$492,135
Singapore	$323,984
Korea Republic of	$294,259
United States of America	$163,091
Vietnam	$132,959
Peru	$73,570

Leading Import Sources - Value

State	Value
SA	$9,531,012
QLD	$9,439,780
VIC	$8,071,373
NSW	$3,312,724
WA	$952,496
TAS	$394,611

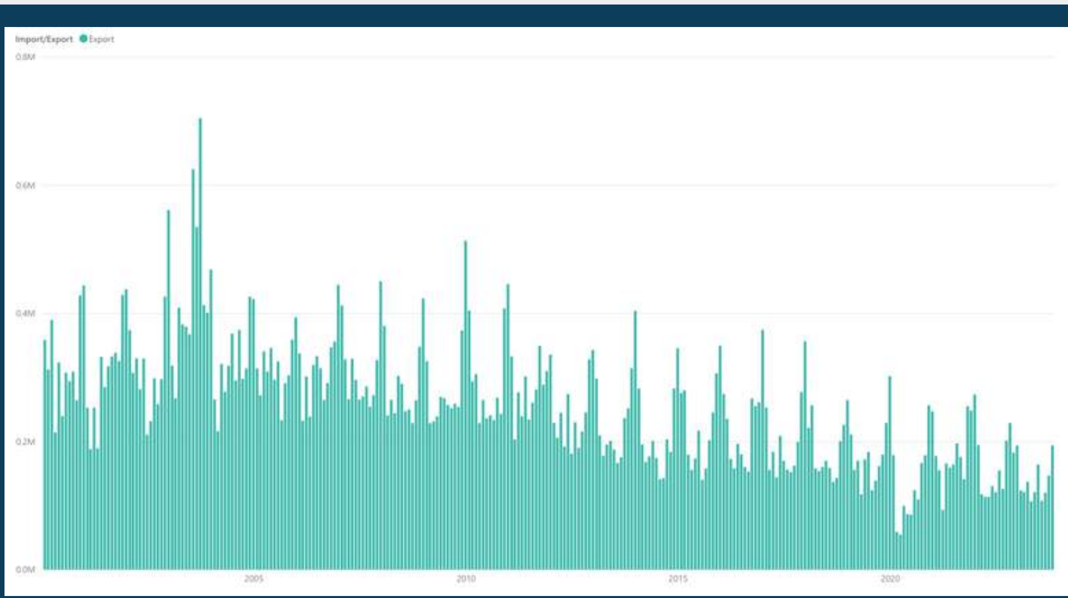
Import Value by State

Source: FRDC, 2023

FRDC - Trade Data

Abalone Exports - Volume

AUS - Trade Data - Species: Abalone (Exports):



Volume of Exports - Abalone

Commodity Description	Quantity
Live, fresh or chilled Abalone	19,508,460
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	13,387,548
Prepared or preserved abalone (excl. abalone of Chapter 03)	10,228,311
Prepared or preserved abalone	8,913,000
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	3,724,277
Prepared or preserved abalone, in cans, bottles or the like	3,529,080
Abalone, frozen, dried, salted or in brine (excl. frozen meat; frozen whole on shell; dried meat; whole parboiled; prepared or preserved of Chapter 16)	3,333,387
Frozen abalone meat	3,044,330
Frozen abalone (Haliotis spp.), whether in shell or not	2,930,919
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	1,801,917
Frozen whole abalone, on shell	1,452,132
Parboiled whole abalone	1,318,775
Dried abalone meat	103,553

Volume of Exports - Commodity Breakdown

Country	Quantity
Hong Kong	31,972,212
Japan	11,529,125
China	11,171,131
Singapore	7,981,436
Taiwan	4,436,016
Vietnam	2,267,247
United States of America	2,099,206
Malaysia	654,178
Canada	647,673
New Zealand	125,137
United Kingdom	112,275
Netherlands	56,955
Thailand	56,049
Macau	38,577
Korea, Republic of	34,712

Leading Export Destinations - Volume

State	Quantity
TAS	31,704,290
VIC	24,167,253
SA	11,948,179
WA	2,369,372
NSW	2,201,603
QLD	751,482
Foreign (re-export)	132,727
NT	783

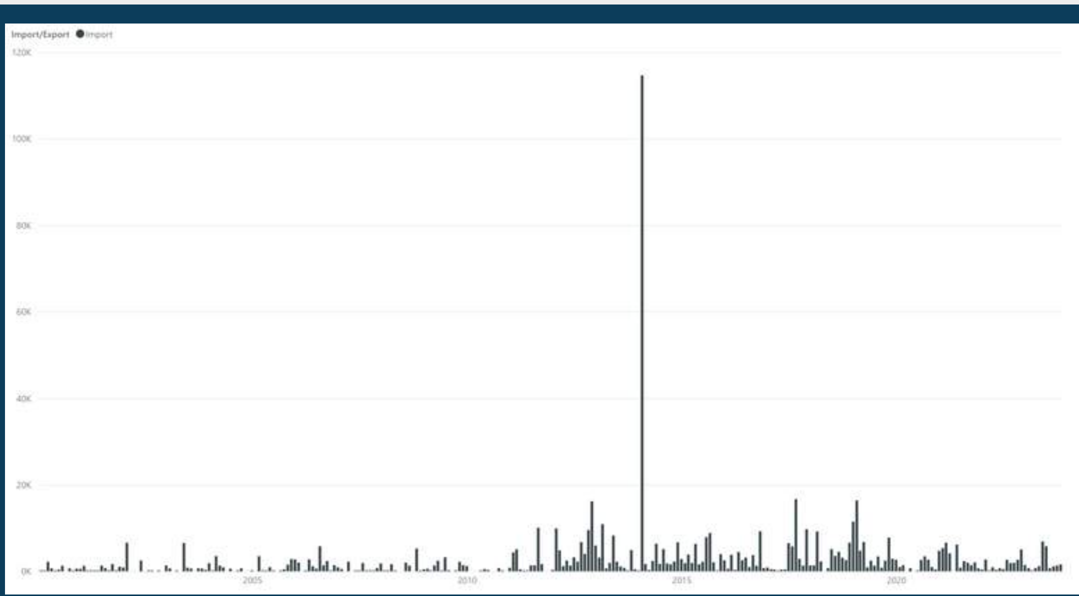
Export Volume by State

Source: FRDC, 2023

FRDC - Trade Data

Abalone Imports - Volume

AUS - Trade Data - Species: Abalone (Imports):



Volume of Imports - Abalone

Commodity Description	Quantity
Prepared or preserved abalone (excl. abalone of Chapter 03)	284,405
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	193,959
Abalone, frozen, dried, salted or in brine	134,437
Frozen abalone (Haliotis spp.), whether in shell or not	50,952
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	24,950
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brin	10,621

Volume of Imports - Commodity Breakdown

Country	Quantity
China	236,734
New Zealand	233,480
Hong Kong	45,610
Malaysia	31,427
Australia (Re-Imports)	27,459
Chile	22,275
Taiwan	19,326
Australia	17,626
Morocco	13,668
Vietnam	13,325
Thailand	8,382
Korea Republic of	7,259
Singapore	5,538
Japan	5,197
United Kingdom	3,490

Leading Import Sources - Volume

State	Quantity
QLD	289,295
VIC	164,966
SA	136,397
NSW	85,684
WA	16,902
TAS	6,080

Import Volume by State

Source: FRDC, 2023

FRDC - Trade Data Sourced from FAO

Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Abalone, Winkles, Conchs

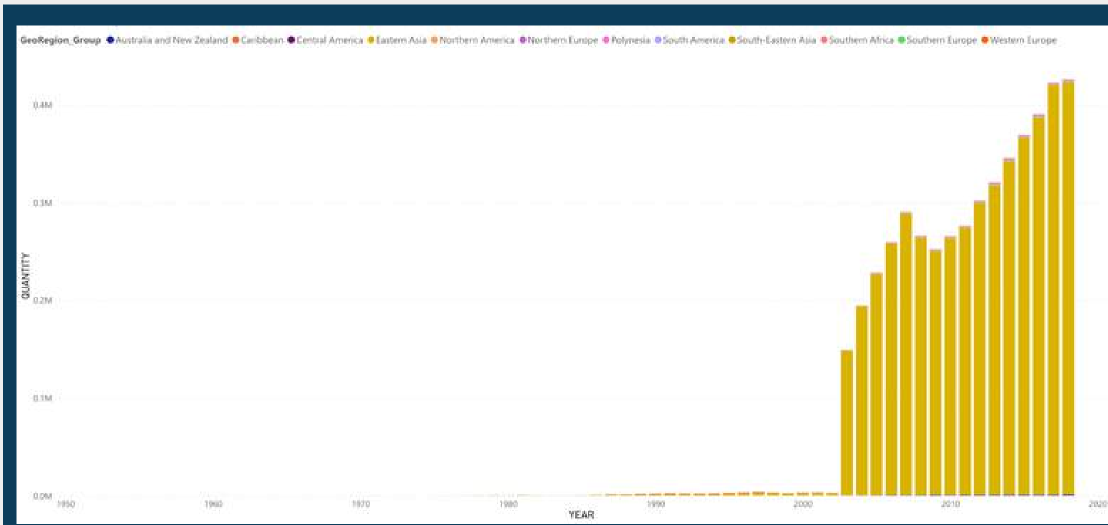
ISSCAAP Species: Abalone, Winkles, Conchs

Production

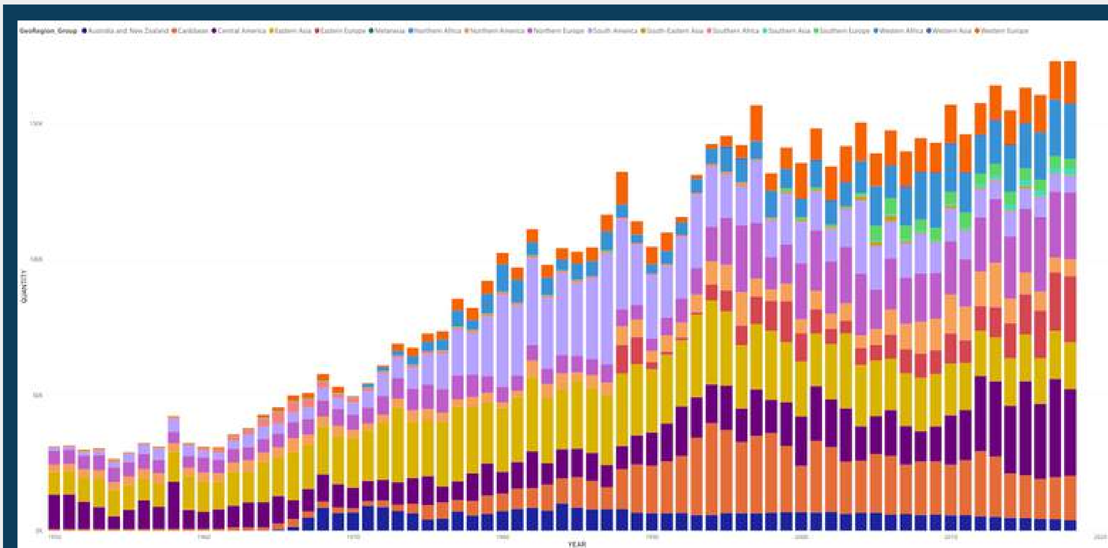
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	2 235	1 662	2 197
Indonesia	Tonnes – net product weight	118	269	323

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	121 364	89 599	133 724
Indonesia	Value (USD 1000)	2 558	4 911	813

Global Fish Trade Volume & Value by ISSCAAP (International Standard Statistical Classification of Aquatic Animals and Plants) - FAO



Production Volume by GeoRegion - Aquaculture Production - FRDC



Production Volume by GeoRegion - Wild Catch Production - FRDC

Source: FAO, FRDC, 2023

Additional Resources

COUNTRY INSIGHTS

Agriculture and Agri-Food Canada - Indonesia Market Overview

Austrade - Indonesia Market Profile

EU Chafea - Indonesia Market Overview

DFAT - Indonesia Country Brief

DFAT - Indonesia Market Insights

Enterprise Singapore - Indonesia Market Profile

HKTDC Research - Indonesia Market Profile

CONSUMER INSIGHTS

GWI - Indonesia Consumer Snapshot

EY - The 9th Edition of EY Future Consumer Index: Indonesia's Insights

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Indonesia Agri-food and Seafood Trends

Agriculture and Agri-Food Canada - Indonesia Foodservice Profile

Agriculture and Agri-Food Canada - E-Commerce Trends in Indonesia

Fisheries Research and Development Corporation (FRDC) - Australia-Specific Trade Data

International Trade Centre - Market-Specific Trade Data

USDA - Retail Foods in Indonesia

USDA - Foodservice in Indonesia

MARKET ACCESS INSIGHTS

UNCTAD - Indonesia Investment Policy Hub

USDA - Indonesia Food and Agriculture Import Regulations and Standards

OTHER RESOURCES

EFIC
Export Connect Portal
Fitch Solutions
GlobalData
Google Trends

IbisWorld
L.E.K.
Marketline
McKinsey
Mintel

Nielsen
NZTE
Seafish UK
Statista
Trading Economics

Contact Us

For more information please contact Seafood Industry Australia:

Laura Davies

Trade Export Manager

trade@seafoodindustryaustralia.com.au

info@seafoodindustryaustralia.com.au

Websites:

www.seafoodindustryaustralia.com.au

www.greataustralianseafood.com.au