UAE Market Summary & Category Data for Fish & Seafood - Lobster

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): **$509.18 billion** as of January 2024.
- GDP Per Capita (USD): **$52,410** as of December 2023.
- Currency: **United Arab Emirates Dirham** (AED).
- Exchange Rate: **1 AED = 0.42 AUD** (01/02/24).
- Mercer's 2023 Quality of Living Ranking: The UAE's highest-ranking city is **Dubai at 79**, followed by **Abu Dhabi at 84**.
- Human Development Index: 0.633 and ranked 132nd as of 2021.
- Logistics Performance Index: **4.00** and ranked **7th** globally as of 2023

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
    - The UAE is a signatory in the Gulf Cooperation Council (GCC) alongside Kuwait, Oman, Bahrain, and Saudi Arabia.
    - The UAE has been a member of the WTO since April 1996.
    - The UAE maintains over 30 Bilateral Investment Treaties (BITs).
    - The UAE does not maintain a FTA with Australia.

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

Demographic Indicators

- Total Population: Approximately **10.17 million** as of January 2024.
- Expatriate Population: Approximately **9.00 million** as of 2024 as per the Ministry of Foreign Affairs.
- Population Growth: **0.80%** as of 2023.
- Median Age: Approximately **33.50 years old**.
- Urban Population: **87.5%** as of 2022.
- **Population Ethnicity:**
  - South Asian (i.e. Pakistan, India, Bangladesh, and Sri Lanka): 58.5%
  - Emirati: 16.5%
  - Other Asian Regions (i.e. Iranian, Filipino): 16.5%
  - Western Expatriates: 8.5%
- **Dominant Religious Groups:**
  - Islam: 76%
  - Other (Hinduism, Buddhism, Sikhism and Judaism): 15%
  - Christianity: 9%

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

Consumer Behaviour & Societal Trends

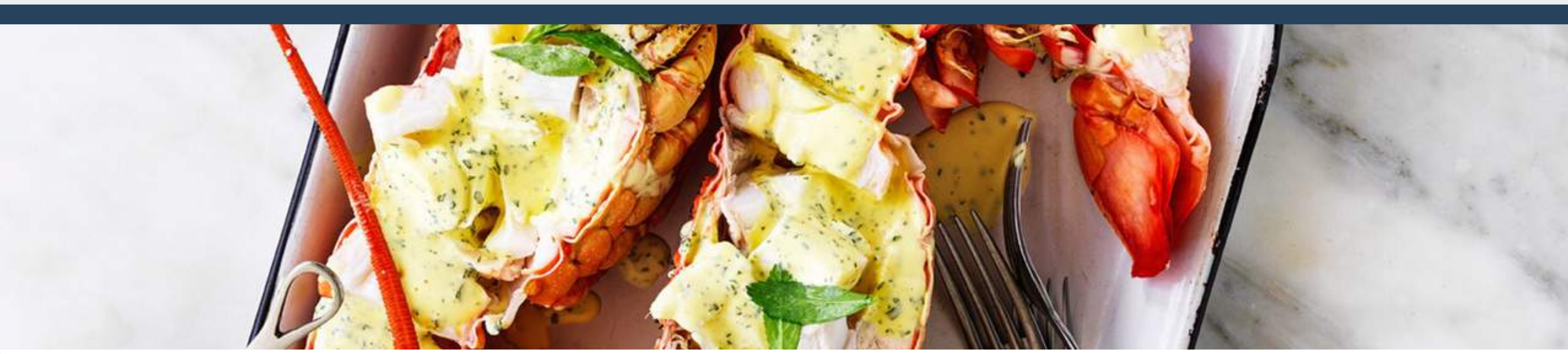
Key Trends:

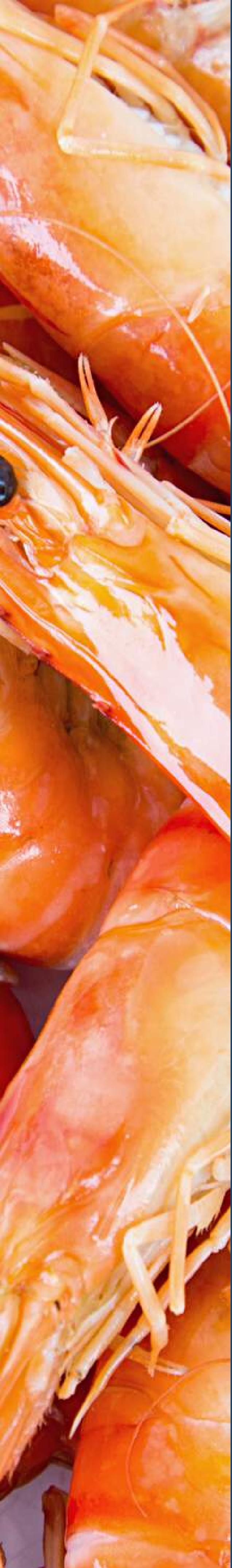
- As the UAE is unable to meet the demand for agri-food products with domestic production, it relies heavily on imports; approximately 90% of its food requirements are noted to be imported.
- A high level of internationalisation by default has created demand for imported food; affluent foreign residents, in particular, are driving demand for international food products.
- High levels of urbanisation and increasingly hectic lifestyles has created growing demand for convenient food solutions.
- Increased nutritional awareness among both UAE nationals and expatriates alike has driven demand for a range of different food products, including organic and functional.
- Grocery shopping is carried out on a weekly basis, transforming into a family-oriented experience for UAE consumers. These outings are primarily carried out in hypermarkets and supermarkets, with each format accounting for 55% and 23% respectively of total grocery sales in 2019.
- A survey carried out by the Glasgow Consultancy Group in Dubai found that women influence 80% of all purchasing decisions.
- UAE consumers commonly travel to city centres or malls to carry out grocery shopping.
- Rapid urbanisation combined with busy lifestyles continue to generate demand for convenience. Consumer preference for modern retail outlets continues to grow within the UAE.
- These modern retail outlets are preferred due to their wider assortment of products, cleaner and more-open spaces, and the availability of offers and promotions. All of which cultivates the family-oriented shopping experience.

Digital Adoption:

- The wide use of social media has resulted in the considerable proliferation of UAE 'influencers' who tout a wide range of products and brands to eager consumers.
- On average, UAE consumers spend 8 hours and 36 minutes on the internet and just over 3 hours on social media.
- WhatsApp was used by 87.4% of UAE consumers, followed by Facebook (81.6%) and Instagram (77.5%).
- According to the 'Digital in 2022 Report', the UAE maintains an internet penetration rate of ~99%; approximately 9.94 million individuals leverage the internet.
    - The UAE has 10.65 million active social media users; a penetration rate of 106.1%

Source: Digital in 2022 Report



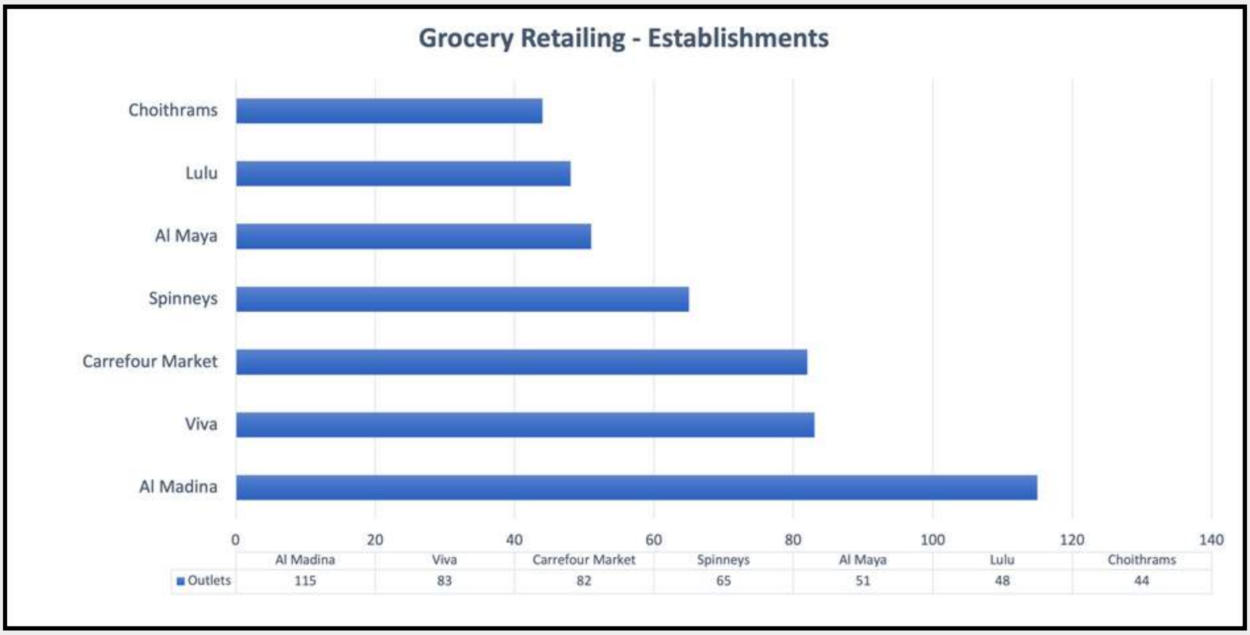


Grocery Retail Channel Developments

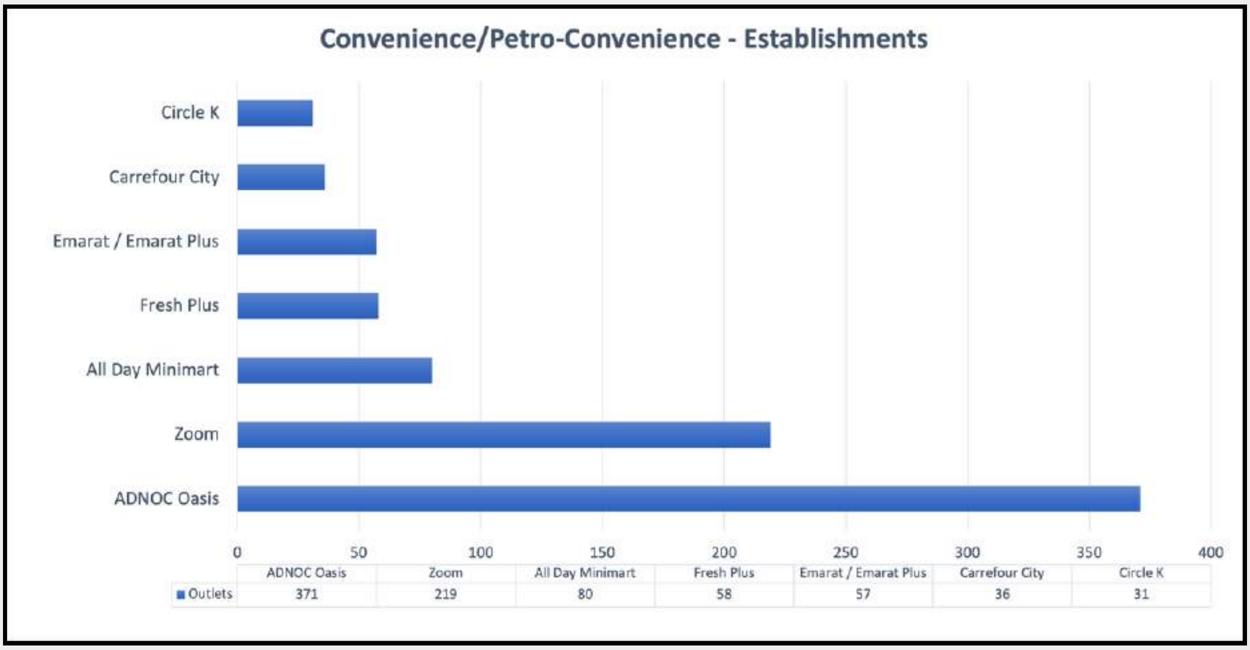
Key Trends:

- Increasingly, grocery retailers are establishing dedicated sections and shelf spacing for healthy and organic food products; Carrefour has redesigned several locations to include a dedicated store section - Carrefour's Healthy Kitchen.
  - In 2018, this section was expanded across more outlets, offering over 2,500 healthy products across organic, diet, free-from, and fitness items at competitive prices.
- Traditionally, healthy alternatives fell into the premium grocery channel, however, hypermarkets and supermarkets in the UAE have addressed rising demand by offering budget-friendly health foods.
  - Promotions have played a significant role in the success of hypermarkets over the review period; Union Co-operative Society announced that it had allocated USD 31 million to launch over 40 promotional campaigns in 2018 - an increase of 74% from the previous year.
  - Similarly, Carrefour has been quite aggressive over the review period, culminating in the launch of a new policy in 2018 whereby they would refund customers the equivalent of 20 times a product's cost in loyalty points if the customer finds the product cheaper at one of its competitors; this tactic is part of Carrefour's strategy to cultivate a reputation as being the least expensive retailer in the United Arab Emirates for household staples.
- Hypermarkets continue to dominate value sales across the UAE's grocery retail sector over the review period; led by Carrefour, Lulu Hypermarket, and Union Co-op.
- Dubai remains the launch pad for regional expansion, ranking number one in overall international retailer presence with over 62% of the world's brands maintaining a presence in-market.
- Smaller emirates such as Ajman and Sharjah maintain a higher proportion of traditional grocers to modern grocery retail outlets due to the subdued presence of modern grocers.

Grocery Retailing Brand Outlets:



Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor

Foodservice Channel Developments

Key Trends:

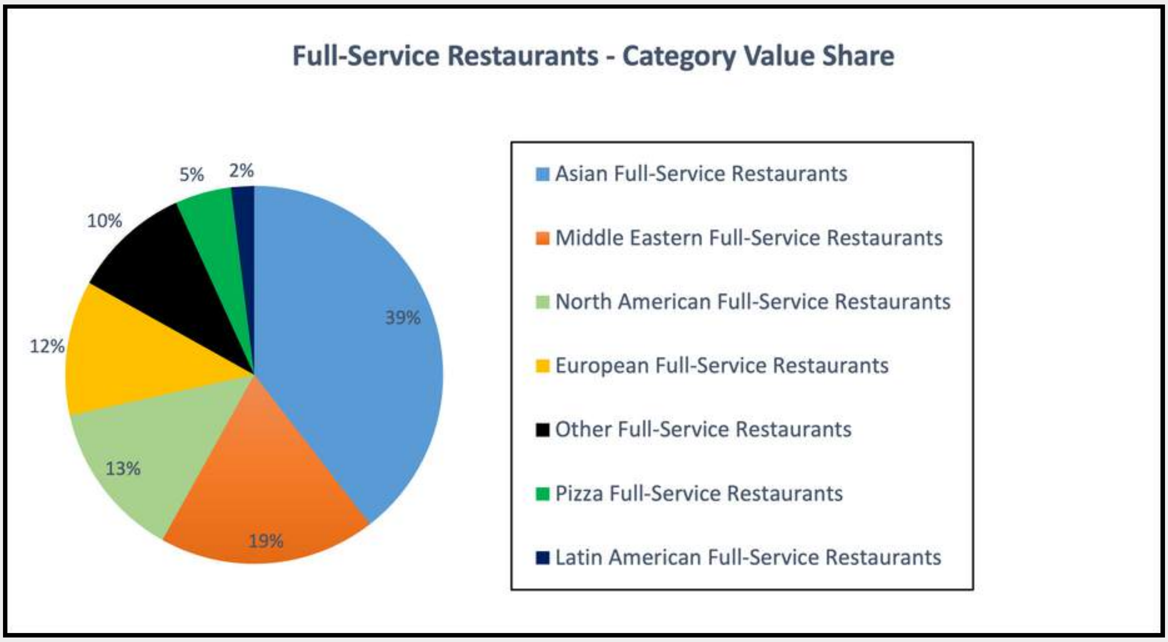
- Foodservice operators continue to struggle in a dampened economic environment; reporting marginal growth and struggling to manage the new tax processes that were introduced in 2018.
- While tourist inflows continue to be a major revenue generator for market players, a shift in the global economic environment has led many consumers to control their expenditure.
- The advent of COVID-19 is expected to close down in excessed of 11,000 foodservice outlets across Dubai alone, with some 40 - 50% of all foodservice outlets being expected to downsize, restructure, or otherwise shut down their operations.
- The UAE’s competitive landscape continues to evolve as an increasing number of full-service restaurants, cafe’s, and QSRs introduce online-ordering and home-delivery via aggregated delivery platforms. COVID-19, has, however, decimated tourist numbers, and led to a significant decline in foodservice footfall across the UAE.
- Health and wellness continues to guide the market offerings of new and existing foodservice operators. An increasing number of market entrants have positioned themselves as specialty food providers, presenting organic juice, alternative milk, and cleansing offerings into the UAE market.
- Foodservice operators are embracing the health- and body-consciousness of UAE consumers; market players have begun to introduce healthier variants into their menus, presenting low-calorie, whole grain, gluten- and dairy-free options.
- Multi-channel independent foodservice providers have largely outperformed chained operators; their ability to leverage online platforms and innovate across their menus have set them apart from their reactive chained counterparts.

- Middle Eastern full-service restaurants continue to outperform their counterparts in both chained and independent markets. Full-service restaurants remain largely fragmented in the UAE, with the majority of value sales being attributed to independent market players; offering lower-priced menu items and leveraging online platforms to increase their reach across the gulf nation.

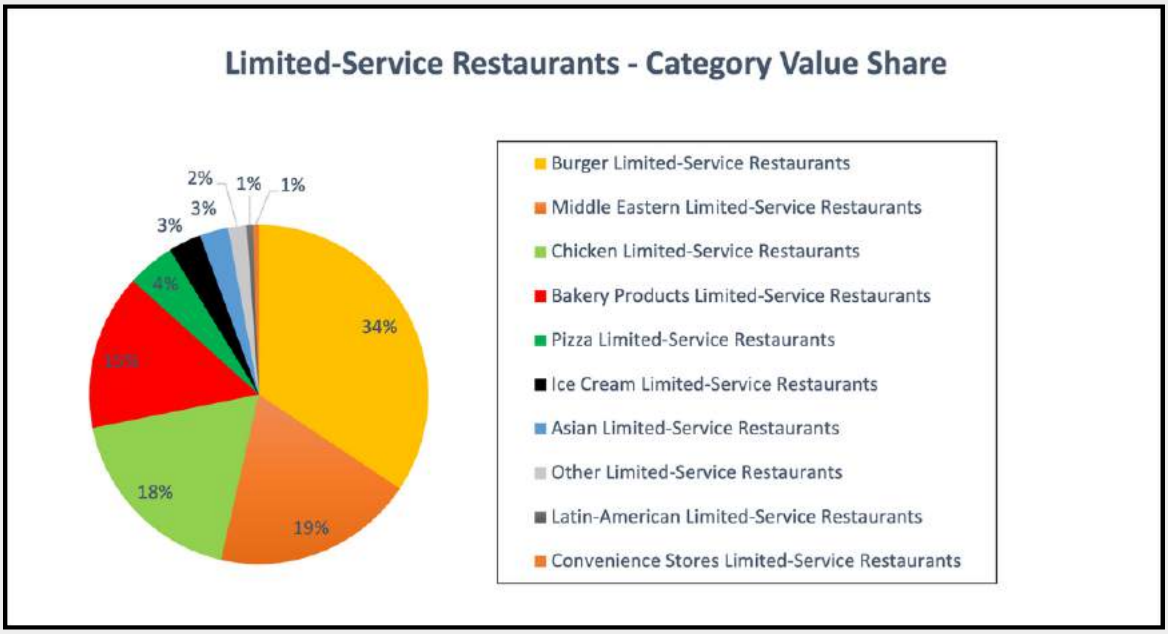
- Across full-service restaurants, Asian restaurants continue to maintain a leading position with over USD 3 billion in value sales; these restaurants are able to offer highly affordable food that is appealing to low-to middle-income consumers, blue-collar workers, and expatriates.

- Fine dining restaurants are expected to face intensifying market conditions, with compromised margins over the forecast period. Consumers in the UAE are noted to be shifting towards casual dining options over fine dining experiences.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Internet retailing is experiencing milestone developments; 2017 was a key year for the country's internet retailing landscape as Amazon completed its acquisition for the region's leading internet retailer souq.com, thus making an entry into the fast-changing e-commerce landscape in the region.

- Internet retailing for food and beverages is a highly dynamic, albeit small channel, recording a CAGR of 28% between 2014 - 2019. Online grocery shopping has been trending recently, especially among young professionals, as the sector has developed, and the offer improved to include fresh items.

- Although still in its infancy, non-store retailing has increased by 202% between 2014-2019.

- E-commerce, and particularly mobile commerce have become more popular since the onset of COVID-19, with 42% of consumers buying items online at least weekly.
    - E-commerce was the only channel to see significant growth in 2021.
    - Demand for subscription services such as meal boxes spiked while in lockdown.
    - When shopping online, key priorities include getting the best price and free shipping.
    - The future of retailing will be increasingly online. This is supported by the UAE's global rank as 4th on the Digital Consumer Index, however there is still a great deal of unmet e-commerce potential.
    - Online retailers offer cash on delivery options to encourage e-commerce.
    - The consistent growth of e-commerce has reduced store-based retailer profits due to the competitive prices offered online, which will likely continue into the future as retailers focus on developing robust omnichannel strategies.

Key E-tailers:

- Initially, pure players such as Supermart and Trolley were leading food and drink internet retailing. As of 2019, almost every major grocery retailer has incorporated online grocery shopping into their strategy, whether that be by developing an online platform, or by partnering with a third-party service such as elGrocer or InstaShop.

- Carrefour and Lulu continue to lead grocery retailers across the UAE's internet retailing channel, while Supermart and Trolley offer strong competition as pure players.

- Omnichannel retailing is rapidly transforming the UAE's retailing sector, with grocery retailers adopting this format over the review period; Emke Group's Lulu brand was one of the first innovators in this space, offering click and collect across their outlets; this model is highly convenient and popular amongst working professionals who may work during the day and collect their groceries in the evenings.

- While e-commerce has taken off, footfall and occupancy in major shopping centres had not experienced any stagnation prior to COVID-19. Given the unique conditions of the UAE, the retail landscape will continue to see a coexistence of mega shopping centres, and e-commerce.

Source: Euromonitor

Seafood Consumption in the UAE

- Fish and seafood supply per person in the UAE is valued at 24.71 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:

- GCC's Standardisation Organisation (GSO): GSO was established by GCC member countries as a mechanism for developing food and non-food standards. GSO technical regulations and standards are the primary reference point for food imports into the gulf region.
- Dubai Municipality: The Dubai Municipality is responsible for import, export, and consignment release. The Municipality also plays a key role in regulating consumer product safety, food safety, lab testing, and accreditation.
- UAE Ministry of Economy: The Ministry of Economy is responsible for the regulation of the UAE's import/exporting environment, and for the development and promotion of the UAE's investment environment among other business and trade activities.
- Ministry of Climate Change and Environment: The Ministry of Climate Change and Environment govern much of the UAE's food and beverage markets. They set out laws and legislations to import and regulate agriculture, animal wealth, fisheries, and other relevant categories.
- Emirates Authority for Standardization and Metrology (ESMA): ESMA is a federal Emirates authority charged with formulating and issuing national standards. ESMA is responsible for a range of standards and is the authority overseeing the UAE System for the Control of Halal Products.

Product Registration/Import Procedure:

- In 2018, the "National Scheme for Food Accreditation and Registration" was introduced in the UAE; this electronic food registration portal, also referenced as "ZADI", enrols all food items prior to sale in the UAE and verifies product compliance.
- Importers will need to register with the Dubai Municipality Food Safety Department and Dubai Trade with a valid Dubai Customs Importer Code. Once registered users can access ZADI through Dubai Trade.
- Users on Zadi can undertake food import requests, food import requests for re-export, register food items, obtain assessment for food labels, apply customs declarations, and search for food items. Note: Direct food importers most deposit a payment of AED 15,000 as a deposit for the importation of an unlimited number of consignments.
- Once registration of a product is approved, the importer will receive a product registration certificate through the ZADI website, which allows them to apply for an import permit - bringing their shipments through any port in the UAE.

Documentation Required:

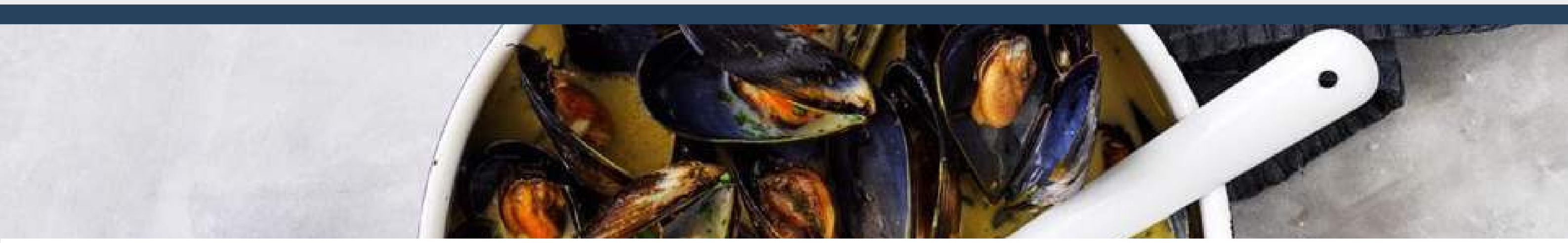
- Bill of entry/airway bill
- Delivery order from the shipping or line agent
- An original health certificate approved by DAWR
- Certificate of origin
- Consignment packing list
- An original halal certificate issued by an Islamic Organisation which is approved by UAE authorities
- A valid trade license copy
- Original supplier's commercial invoice

General Labelling Requirements:

- Labels for imported goods/food must have the following standard information in both English and Arabic (can be stickered onto the packaging):
- Product name
- Ingredients in descending order of proportion
- Additives; the name of the additives or E-number must be declared alongside the group name of the additive
- Net weight/contents in metric units
- The name and address of the manufacturer, producer, distributor, importer, exporter, or vendor
- The country of origin
- Expiry dates, special storage, and preparation instructions
- Allergy information on ingredients (if any)
- Lot identification
- The source of animal fats (beef, buffalo, etc.)
- Foodstuffs and ingredients which are known to cause hypersensitivity
- Barcode
- Irradiated food

Packaging Requirements:

- Packaging of goods should be made to protect against extreme heat and humidity, and storage in the open.
- Outer containers are required to bear the consignee's mark, and port mark in Arabic - a requirement as the majority of wharf labourers are not able to read English.
- A detailed packing list highlighting the weight, method of packing, and the HS codes of each individual article contained in the shipment is required.
- Packaging and wrapping materials should be strong, sound, and hygienic and must not cause any alteration in meat properties.



Certificate Requirements:

- Halal Certification: Any halal claims must be accompanied by an original Halal Product Certificate.
  - Recognised Islamic bodies for Halal certification varies from market-to-market; the following are examples of Halal certification bodies operating out of Australia that are recognised by ESMA:
    - Halal Certification Authority (HCA)
    - Islamic Coordinating Council of Victoria
    - Supreme Islamic Council of Halal Meat in Australia (SICHMA)
- Certificate of Origin: As highlighted by Austrade, a certificate of origin stating that the goods or materials are of Australian origin is required for consignments to be cleared at customs. The Australian Arab Chamber of Commerce & Industry is authorised to issue documentary evidence of origin by the Australian Chamber of Commerce & Industry.
- Bill of Lading: The appropriate tariff classification number should be shown - to ensure that the correct freight rate is applied to the shipped items.
  - Two original copies must be provided at the minimum.
  - Original bills must be provided if the ladings have to be endorsed by the shipper. If no endorsement is required, a full set of originals would have to be handed to the line.

Non-Tariff Barriers:

- Import controls exist for specific food and beverage product categories such as alcoholic beverages, pork and pork-based products, and medicinal substances.
- In order to export in the UAE, companies must align themselves with partners that have the appropriate trade licences.

Tariffs Levied:

- As of January 1st, 2018, a 5% Value Added Tax rate has been included on the sales of various services and products with the exception of education, healthcare, and certain food essentials. The government claims that the implementation of the VAT is part of its larger macroeconomic plan to support GDP growth.
- The UAE Cabinet has applied a 50% Excise Tax on Sugar Sweetened Beverages ("SSBs") and a 100% Excise Tax on energy drinks.

Source: USDA Food and Agricultural Import Regulations and Standards Country Reports [FAIRS], Austrade, DFAT, Export.gov

Category Data

Fish and Seafood in the UAE

Key Trends:

- Despite the impact of COVID in 2019/20, population growth, tourism, and convenient food options have all contributed to strong growth within the UAE's fish and seafood category over the review period.
  - The country continues to invest heavily in modernising its trading infrastructure to position itself as a global commercial hub and accommodate a higher number of traders efficiently.
  - Part of this investment is focused on fishing fleets and equipment; with the UAE being situated along the Arabian Gulf, there is much interest in further improving this the capabilities of what was once a prominent fishing nation.
  - UAE consumers continue to be the highest consumers of fish among all GCC countries, with the Minister of State for Food Security claiming that residents in the UAE consume approximately 25.3kg of fish annually per capita – 20% more than the global average.
  - For fresh food categories such as fish, meat, vegetables and fruit, the key attributes highlighted by Euromonitor include freshness, nutritional value, and health-boosting claims.

- Prior to COVID-19, foodservice was a rapidly growing channel for fish and seafood players.
  - COVID-19 is noted to have decimated value sales growth for foodservice players in the region, with 40 - 50% of all foodservice outlets being expected to downsize, restructure, or shut down in the UAE.
  - Southeast Asians, in particular, are highlighted as a key consumer of seafood across the UAE's foodservice channel.
  - From a retail volume perspective, Euromonitor estimates 54.3% of total volume across the UAE's fish and seafood category is made up of packaged seafood, while 45.7% of total volume is made up of unpackaged seafood products.
  - Frozen fish and seafood in particular, has been highlighted as a category with dynamic growth in 2019; this growth has been attributed to increased acceptance among consumers who were previously sceptical towards frozen fish in the past.
  - The core target market for frozen fish are busy urban consumers that seek out convenient food options for lunch and dinner.

- Frozen fish and seafood enjoyed a boost with the onset of the COVID-19 pandemic – many of these offerings are noted to have witnessed innovation towards the end of the review period, allowing brands to fill the gap created by the closure of foodservice outlets.
  - Innovation includes the development of formats adapted for quick preparation of meals such as resealable packaging and reduced weight; the constant enhancement in the nutritional value of these products is another notable point of focus for fish and seafood brands.

- Organic fish and seafood experienced strong growth over the review period, and in particular, 2019.
  - Westerners with high disposable incomes are noted to be seeking out organic variants when shopping for fish and seafood; these consumers pay attention to key claims such as sustainable fishing certifications.
  - Premium seafoods are expected to experience a gradual increase in demand over the forecast period across mid-to-high income consumers, with Euromonitor forecasting a growth in organic and premium options across retail chains through to 2025.

- Hypermarkets and supermarkets continue to lead retail value sales of fresh fish and seafood products in the UAE.
  - This value share is attributed to their large space, and assurance of quality and hygiene.
  - There has been strong growth across independent small grocers such as stalls in The Waterfront Market since its opening in 2017, however, these retailers do not challenge the leadership of hypermarkets and supermarkets.

- While still relatively immature, the share of private label products in the UAE has increased over the past year, with the toll of the pandemic on disposable incomes being a key contributor to heightened demand.
  - The two main private label players in the UAE, Lulu and Carrefour, have intensified their efforts to increase the visibility of their private label range by allocating prime shelf space to these products, and running continuous promotions.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
United Arab Emirates	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	203.01	4.07
				2027	222.11	1.81
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	116.01	3.27
				2027	129.43	2.21
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	66.66	-3.11
				2027	67.59	.28
		Dried Fish & Seafood	Dried Fish & Seafood	2022	69.17	2.68
				2027	77.84	2.39
		Fresh Fish & Seafood (Counter)	Fish	2022	97.22	-.62
				2027	95.84	-.28
			Shellfish	2022	78.91	-10.25
				2027	81.07	.54
		Frozen Fish & Seafood	Frozen Processed Fish	2022	84.59	3.48
				2027	98.64	3.12
			Frozen Whole Cuts Of Fish & Seafood	2022	119.40	.12
				2027	126.84	1.22

Source: GlobalData, 2024

ITC - Trade Data

Crustaceans, Live, Fresh, Chilled in the UAE

UAE - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled... (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	310,078	59,058	4	1	4
1	India	135,506	24,823	-6	-6	-7
2	Ecuador	50,549	8,739	41	296	280
3	Iran	29,415	13,689	-1	12	26
4	Somalia	20,775	852	83	33	26
5	Pakistan	13,048	2,660	-24	-11	-9
6	Vietnam	8,975	964	-23	18	-19
7	Russia	7,913	157	112	83	32
8	United States	7,115	453	-20	3	4
9	China	4,553	690	-60	-21	-25
10	Oman	3,520	1,210	53	123	182

AUS - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled... (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	273,365	7,331	-13	-21	-16
1	Hong Kong	92,464	2,579	-43	45	33
2	Taiwan	74,521	1,996	186	120	92
3	Vietnam	26,239	676	-38	-6	-18
4	United States	19,811	286	11	33	24
5	Thailand	17,326	491	-5	52	-1
6	China	16,903	470	7	-64	-58
7	Singapore	9,894	267	128	26	22
8	Japan	4,355	145	-56	-32	-37
9	Malaysia	2,866	98	23	-10	-25
10	New Zealand	1,990	84	-26	-10	-18

Source: ITC Trade Map, 2023

ITC - Trade Data

Prepared or Preserved Lobster in the UAE

UAE - Trade Data - HS Code 160530 Lobster, Prepared or Preserved <u>(Import):</u>

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	708	20	79	8	-5
1	Canada	596	8	222	52	30
2	United States	37	1	106	-39	-49
3	France	34	0	-80	-16	-
4	United Kingdom	19	1	111	20	0
5	India	8	1	-20	67	-24
6	Australia	6	1	-	-7	0
7	Taiwan	5	6	-	-	-
8	Mauritania	4	1	-	-	-
9	Hong Kong	-	-	-	-	-
10	Egypt	-	-	-	-	-

AUS - Trade Data - HS Code 160530 Lobster, Prepared or Preserved <u>(Export):</u>

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)
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1						
2						
3						
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5	NO DATA AVAILABLE					
6						
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Source: ITC Trade Map, 2023

ITC - Trade Data

Live, Fresh or Chilled Rock Lobster in the UAE

UAE - Trade Data - HS Code 030631 Live, Fresh or Chilled Rock Lobster (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	2,054	0	20	91	-
1	Australia	1,045	30	57	89	112
2	Egypt	480	169	50	324	316
3	France	256	7	8	99	70
4	Greece	45	1	1,025	77	-
5	United Kingdom	37	1	-	200	-
6	Spain	31	0	-66	-	-
7	Norway	27	1	-	14	-
8	Canada	27	1	-	-	-
9	Madagascar	23	2	-	-	-
10	Oman	23	0	10	-	-

AUS - Trade Data - HS Code 030631 Live, Fresh or Chilled Rock Lobster (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	224,195	5,971	-7	-23	-11
1	Hong Kong	91,896	2,568	-39	76	112
2	Taiwan	69,981	1,856	189	235	264
3	Vietnam	25,576	634	-27	123	-20
4	Thailand	16,346	343	13	1,446	-
5	Singapore	8,716	245	154	54	91
6	Japan	3,285	87	112	6	14
7	Malaysia	2,666	82	88	23	44
8	United States	1,970	46	-7	44	73
9	South Korea	1,356	40	-38	-	-
10	United Arab Emirates	1,249	36	40	63	85

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Rock Lobster in the UAE

UAE - Trade Data - HS Code 030611 Frozen Rock Lobster (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	3,909	156	69	9	10
1	Somalia	2,655	87	307	67	48
2	Oman	371	20	-64	-	22
3	Brazil	312	15	-	-21	-18
4	India	284	21	8	12	4
5	Bangladesh	82	4	-	-	-
6	Spain	76	2	1,420	106	19
7	France	41	0	-25	-20	-
8	Indonesia	27	3	-	-	-
9	Singapore	16	1	-	-	-
10	United Kingdom	10	0	25	92	-

AUS - Trade Data - HS Code 030611 Frozen Rock Lobster (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	36,650	858	53	46	51
1	United States	17,614	234	18	39	33
2	China	9,123	313	176	126	166
3	Taiwan	4,153	135	733	131	125
4	Japan	912	49	66	-3	15
5	Greece	846	26	113	-	-
6	France	840	26	110	441	-
7	Singapore	816	15	371	-9	-12
8	Italy	580	18	61	-	-
9	South Korea	506	11	2,376	-	-
10	New Zealand	434	11	-31	115	99

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Lobsters in the UAE

UAE - Trade Data - HS Code 030612 Frozen Lobsters (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	24,079	1,079	74	13	2
1	Somalia	17,358	737	77	29	26
2	Oman	2,752	166	167	128	116
3	Canada	1,649	43	92	10	9
4	India	703	58	107	-25	-26
5	France	491	27	73	44	50
6	Brazil	314	15	0	-23	-26
7	Madagascar	221	9	0	-	-
8	United States	187	4	-80	-35	-44
9	New Zealand	153	3	128	0	-13
10	Pakistan	86	13	-17	363	-

AUS - Trade Data - HS Code 030612 Frozen Lobsters (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	919	22	1,980	-12	-15
1	New Zealand	729	17	-	33	103
2	United States	134	5	212	-	-
3	Hong Kong	41	0	3,205	-	-
4	Nauru	9	0	-	42	-
5	Singapore	6	0	-	-	-
6	Papua New Guinea	1	0	-	-	-
7	The Philippines	-	-	-	-	-
8	United Arab Emirates	-	-	-	-	-
9	India	-	-	-	-	-
10	Malaysia	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Lobster in the UAE

UAE - Trade Data - HS Code 030632 Fresh or Chilled Lobster (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	8,700	418	10	7	-3
1	United States	6,130	281	-2	20	14
2	Canada	1,402	61	126	-17	-22
3	Australia	411	10	59	33	56
4	United Kingdom	210	5	13	-7	-14
5	Yemen	140	18	-	48	32
6	Somalia	129	5	345	-25	-45
7	France	71	2	-49	-15	-20
8	Pakistan	69	23	25	-25	-26
9	India	66	8	29	30	4
10	Greece	29	1	-29	-	-

AUS - Trade Data - HS Code 030632 Fresh or Chilled Lobster (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	131	3	-15	-23	-13
1	Vietnam	74	2	-44	75	19
2	New Zealand	31	1	49	-	-
3	United States	21	0	-	61	-
4	Singapore	5	0	-	-45	-
5	China	-	-	-	-	-
6	Canada	-	-	-	-	-
7	France	-	-	-	-	-
8	Hong Kong	-	-	-	-	-
9	Italy	-	-	-	-	-
10	South Korea	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Norway Lobsters in the UAE

UAE - Trade Data - HS Code 030615 Frozen Norway Lobsters (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	1,420	58	17	92	81
1	Denmark	681	28	19	88	108
2	Somalia	430	17	1	-	-
3	United Kingdom	120	5	264	114	50
4	France	84	3	18	61	-
5	The Netherlands	69	5	-5	23	14
6	Greece	10	0	233	-	-
7	Iceland	8	0	-	130	-
8	Spain	7	0	-13	-	-
9	Italy	7	0	-	-	-
10	Norway	4	0	-20	-	-

AUS - Trade Data - HS Code 030615 Frozen Norway Lobsters (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	95	3	-75	-	-
1	China	84	3	-74	-	-
2	Hong Kong	8	0	-73	-	-
3	Singapore	2	0	-93	-	-
4	Tunisia	-	-	-	-	-
5	United Kingdom	-	-	-	-	-
6	Italy	-	-	-	-	-
7	France	-	-	-	-	-
8	Spain	-	-	-	-	-
9	Croatia	-	-	-	-	-
10	Ireland	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Dried, Salted, Smoked or in Brine Rock Lobster in the UAE

UAE - Trade Data - HS Code 030691 Dried, Salted, Smoked or in Brine Rock Lobsters (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	194	4	1,517	17	-20
1	France	183	2	3,560	-	-
2	Somalia	9	1	-	-	-
3	Nigeria	1	1	-	5	-
4	The Bahamas	-	-	-	-	-
5	Denmark	-	-	-	-	-
6	United States	-	-	-	-	-
7	Morocco	-	-	-	-	-
8	Mozambique	-	-	-	-	-
9	Yemen	-	-	-	-	-
10	Spain	-	-	-	-	-

AUS - Trade Data - HS Code 030691 Dried, Salted, Smoked or in Brine Rock Lobsters (Export):

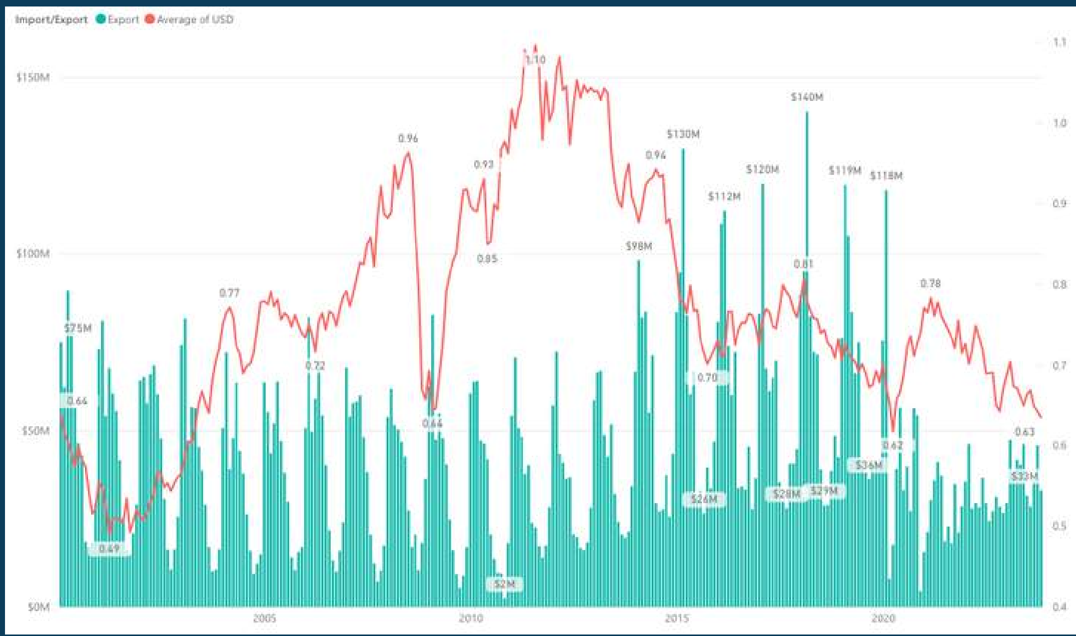
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	32	1	-25	64	-38
1	Malaysia	32	1	-	-	-
2	Saudi Arabia	-	-	-	-	-
3	Framce	-	-	-	-	-
4	United Kingdom	-	-	-	-	-
5	Italy	-	-	-	-	-
6	United States	-	-	-	-	-
7	Switzerland	-	-	-	-	-
8	United Arab Emirates	-	-	-	-	-
9	Germany	-	-	-	-	-
10	Romania	-	-	-	-	-

Source: ITC Trade Map, 2023

FRDC - Trade Data

Lobster Exports - Value

AUS - Trade Data - Species: Lobster (Export):



Value of Exports - Lobster

Commodity Description	Value
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not	$3,579,873,595
Whole live, fresh or chilled rock lobster, whether in shell or not and whether or not eviscerated, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$3,491,032,762
Unfrozen rock lobster, whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process, or cooked in shell by steaming or by boiling in water	$2,822,357,259
Frozen raw rock lobster tails, whether in shell or not	$1,055,243,181
Frozen whole rock lobster, in shell, cooked by boiling in water	$816,618,461
Frozen raw whole rock lobster, whether in shell or not	$309,847,999
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	$90,123,077
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$89,593,671
Frozen rock lobster, whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	$59,901,357
Frozen lobsters (Homarus spp.) whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. rock lobsters)	$47,900,168
Fresh or chilled rock lobster tails, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. tails of lobsters (Homarus spp.))	$12,599,498
Frozen rock lobster, whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	$10,596,235
Unfrozen rock lobster, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$10,356,320
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	$5,780,493
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	$1,825,271
Dried, salted, in brine, or smoked rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	$753,893
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	$735,300
Prepared or preserved lobster (excl. lobster of Chapter 03)	$341,755
Dried, salted, in brine, or smoked Norway lobsters (Nephrops norvegicus) (excl. frozen, live, fresh or chilled), whether in shell or not	$43,768
Dried, salted, in brine, or smoked lobsters (Homarus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	$27,955

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	$3,840,061,489
Vietnam	$3,030,516,063
China	$2,330,035,330
United States of America	$1,047,201,625
Japan	$959,890,832
Taiwan	$795,815,238
Singapore	$137,704,195
France	$90,390,471
Thailand	$83,989,281
Malaysia	$32,541,935
United Arab Emirates	$13,961,204
United Kingdom	$10,866,599
Italy	$8,648,380
Belgium	$7,852,650
New Zealand	$6,957,272

Leading Export Destinations - Value

State	Value
WA	$7,739,266,697
SA	$1,772,581,085
VIC	$1,474,086,636
QLD	$631,194,932
TAS	$610,229,610
Foreign (re-export)	$107,496,401
NSW	$90,393,005
NT	$303,652

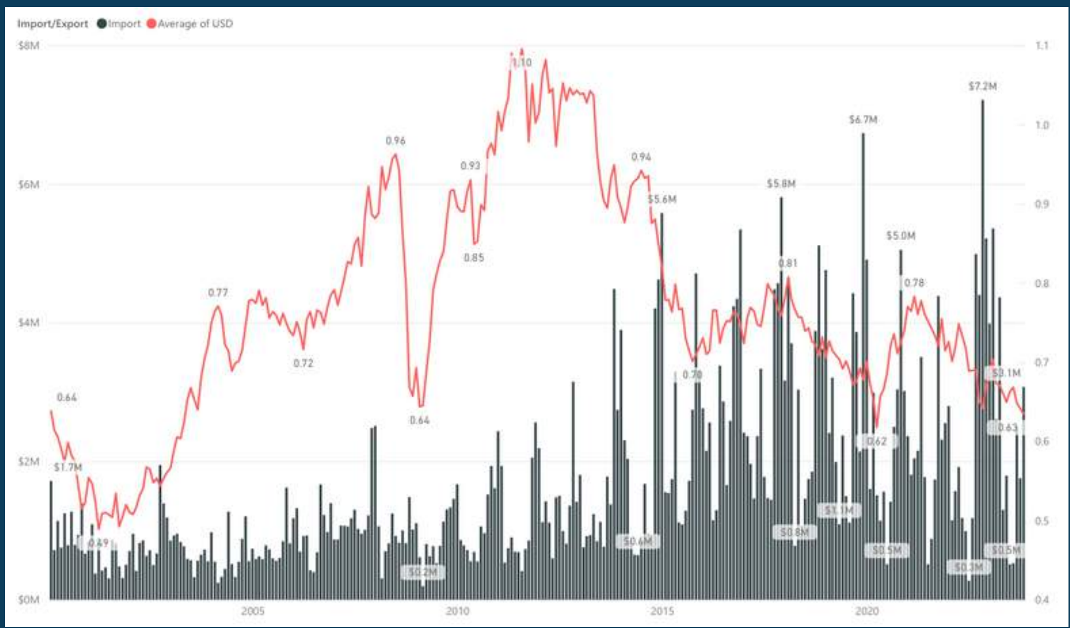
Export Value by State

Source: FRDC, 2023

FRDC - Trade Data

Lobster Imports - Value

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



Value of Imports - Lobster

Commodity Description	Value
Frozen rock lobster and other sea crawfish (Palinurus spp., Panulirus spp. & Jasus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. lobsters & Norway lobsters)	$219,379,520
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	$103,068,355
Frozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$78,970,777
Frozen lobsters (Homarus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$50,341,704
Prepared or preserved lobster (excl. lobster of Chapter 03)	$7,209,545
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	$4,540,489
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	$3,513,630
Unfrozen rock lobster and sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water	$2,806,624
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	$2,469,200
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$1,029,191
Unfrozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water	$230,439
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excludi	$4,365

Value of Imports - Commodity Breakdown

Country	Value
Brazil	$89,684,786
Papua New Guinea	$73,451,069
United States of America	$55,514,005
Canada	$45,306,777
Thailand	$29,289,885
Bahamas	$29,239,326
Cuba	$26,142,530
Indonesia	$24,432,902
Vietnam	$19,305,270
St Helena	$11,151,961
South Africa	$10,047,916
Belize	$9,269,833
Nicaragua	$6,043,098
Malaysia	$5,575,910
Taiwan	$5,185,073
India	$4,717,322

Leading Import Sources - Value

State	Value
NSW	$223,912,203
QLD	$111,430,498
VIC	$74,561,966
WA	$57,316,768
SA	$3,609,221
NT	$2,733,183

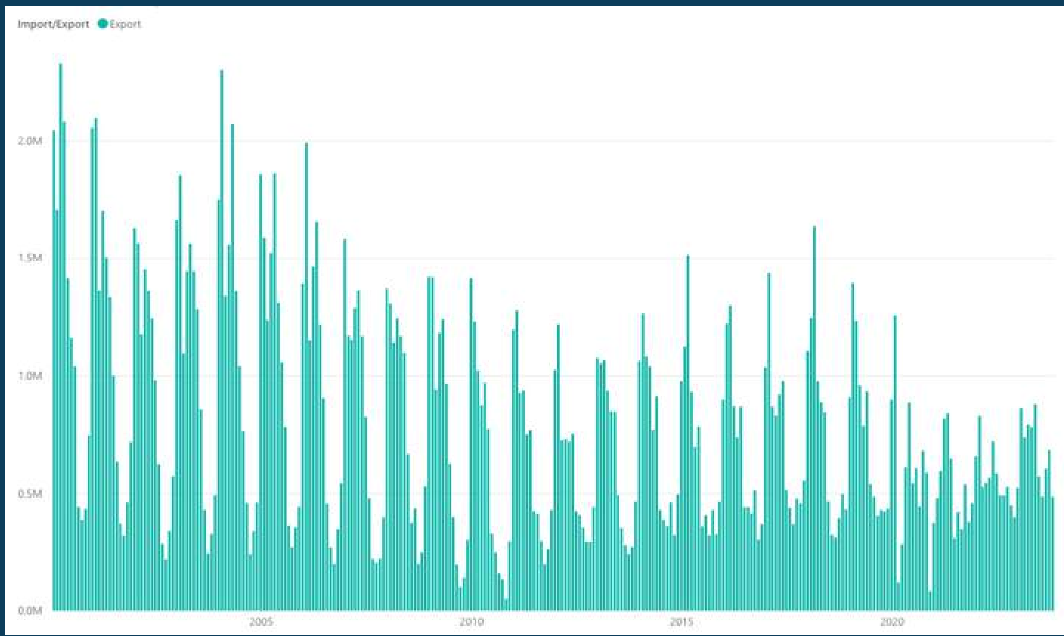
Import Value by State

Source: FRDC, 2023

FRDC - Trade Data

Lobster Exports - Volume

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



Volume of Exports - Lobster

Commodity Description	Quantity
Whole live, fresh or chilled rock lobster, whether in shell or not and whether or not eviscerated, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	79,520,348
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not	49,724,502
Unfrozen rock lobster, whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process; or cooked in shell by steaming or by boiling in water	37,580,542
Frozen whole rock lobster, in shell, cooked by boiling in water	25,728,357
Frozen raw rock lobster tails, whether in shell or not	16,616,879
Frozen raw whole rock lobster, whether in shell or not	8,818,645
Frozen rock lobster, whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	4,447,513
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	2,104,442
Frozen lobsters (Homarus spp.) whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. rock lobsters)	1,173,138
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	1,057,427
Frozen rock lobster, whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	606,496
Fresh or chilled rock lobster tails, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. tails of lobsters (Homarus spp.))	246,112
Unfrozen rock lobster, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	244,676
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	119,613
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	24,251
Dried, salted, in brine, or smoked rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	23,739
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	23,454
Prepared or preserved lobster (excl. lobster of Chapter 03)	13,750
Dried, salted, in brine, or smoked Norway lobsters (Nephrops norvegicus) (excl. frozen, live, fresh or chilled), whether in shell or not	1,320
Dried, salted, in brine, or smoked lobsters (Homarus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	382

Volume of Exports - Commodity Breakdown

Country	Quantity
Hong Kong	79,960,525
Vietnam	38,829,121
China	33,651,000
Japan	28,224,705
Taiwan	21,553,041
United States of America	16,691,801
Singapore	3,285,582
France	2,300,130
Thailand	1,218,605
Malaysia	576,722
United Arab Emirates	272,762
United Kingdom	247,275
Italy	233,753
New Zealand	184,993
Belgium	155,871

Leading Export Destinations - Volume

State	Quantity
WA	153,781,545
SA	30,233,806
VIC	19,277,474
QLD	11,106,924
TAS	10,496,502
Foreign (re-export)	1,661,556
NSW	1,511,222
NT	6,557

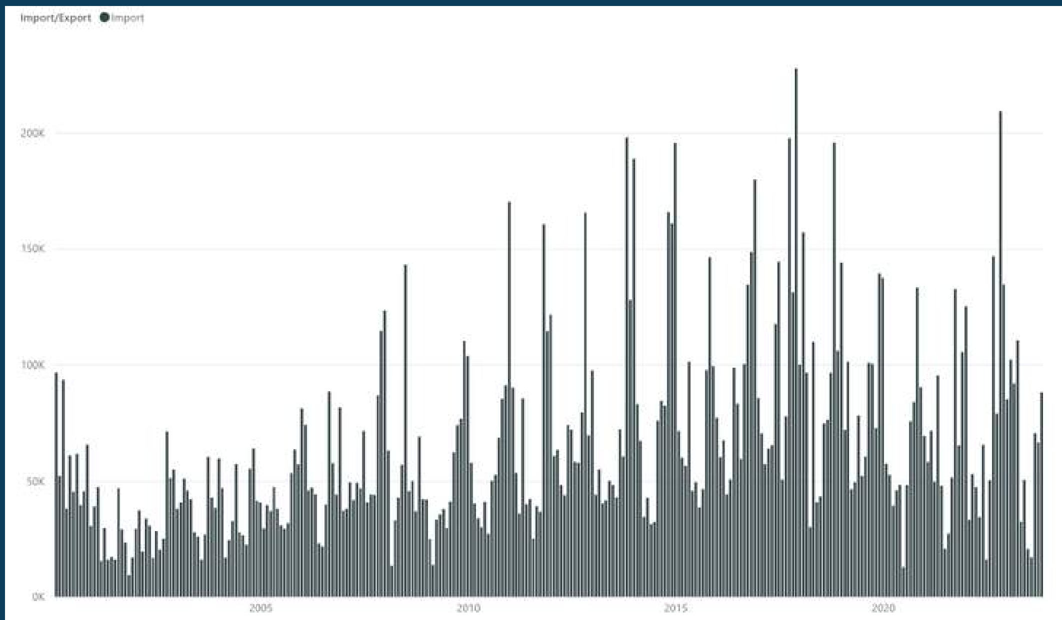
Export Volume by State

Source: FRDC, 2023

FRDC - Trade Data

Lobster Imports - Volume

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



Volume of Imports - Lobster

Commodity Description	Quantity
Frozen rock lobster and other sea crawfish (Palinurus spp., Panulirus spp. & Jasus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. lobsters & Norway lobsters)	5,935,353
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	5,017,586
Frozen lobsters (Homarus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	3,556,499
Frozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	3,227,989
Prepared or preserved lobster (excl. lobster of Chapter 03)	446,144
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	216,710
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	75,394
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	72,932
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	69,238
Unfrozen rock lobster and sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water	65,146
Unfrozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water	6,410
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excludi	300

Volume of Imports - Commodity Breakdown

Country	Quantity
Canada	2,274,062
United States of America	2,224,348
Brazil	2,129,992
Thailand	1,994,964
Papua New Guinea	1,857,323
Indonesia	1,621,918
Vietnam	1,357,950
Cuba	991,241
Bahamas	681,860
Malaysia	443,264
India	359,982
South Africa	336,577
St Helena	331,995
Taiwan	310,085
China	233,344

Leading Import Sources - Volume

State	Quantity
NSW	8,162,274
QLD	4,023,709
VIC	3,294,565
WA	2,785,180
NT	291,130
SA	132,843

Import Volume by State

Source: FAO, FRDC, 2023

FRDC - Trade Data Sourced from FAO

Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Lobsters, spiny-rock lobsters

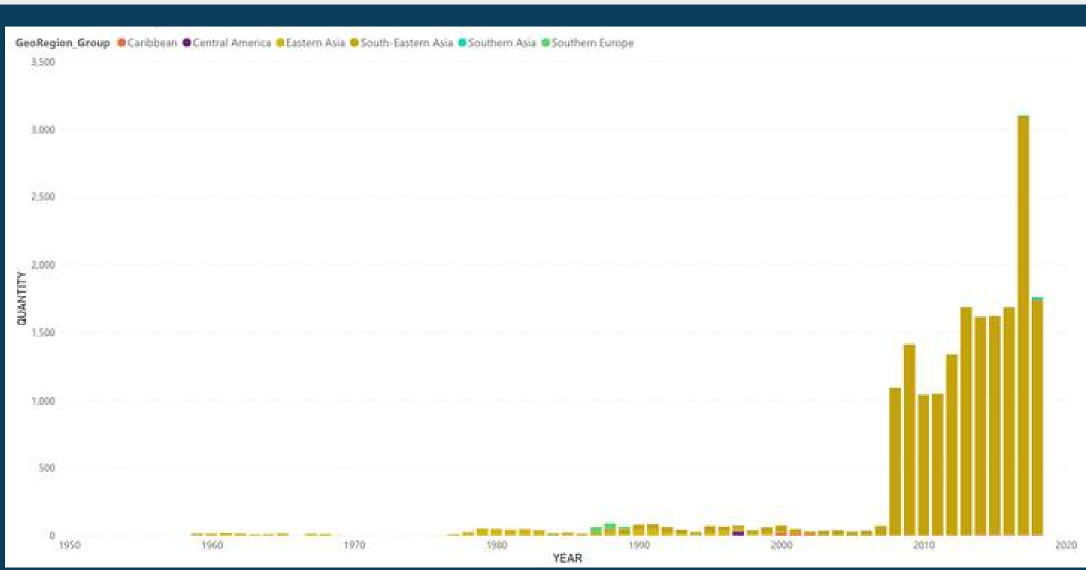
ASFIS Species: Lobsters, spiny-rock lobsters

Production

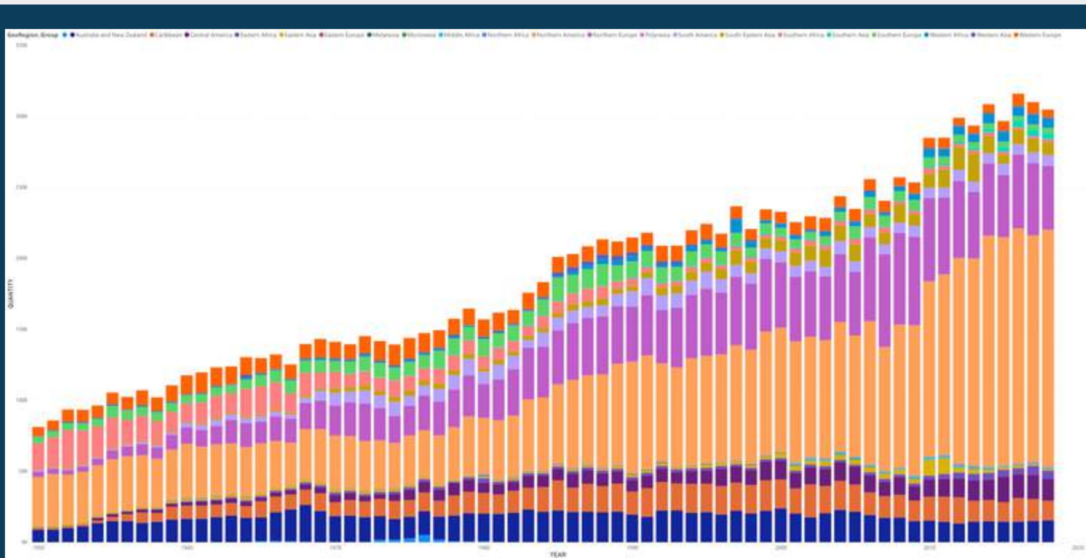
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	7 317	7 215	9 922
United Arab Emirates	Tonnes – net product weight	2 349	1 998	2 980

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	278 992	341 450	558 112
United Arab Emirates	Value (USD 1000)	49 271	36 068	49 728

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 - UAE Market Overview

Austrade - UAE Market Profile

DFAT - UAE Country Brief

DFAT - UK Market Insights

Enterprise Singapore - UAE Market Profile

FoodExport - UAE Country Profile

HKTDC Research - UAE Market Profile

Santandar Trade Markets - UAE Market Overview

USDA - UAE Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - UAE Consumer Profile

GWI - UAE Consumer Snapshot

Santandar Trade Markets - Reaching the UAE Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - UAE Foodservice Profile

Euromonitor International - UAE Fish & Seafood Category Overview

Euromonitor International - UAE Consumer Foodservice Overview

Euromonitor International - UAE Retailing Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - UAE Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - UAE Investment Policy Hub

USDA - UAE Import Regulations & Standards

DFAT - Australia-Gulf Cooperation Council FTA

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

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