UK 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): **$3.33 trillion** as of January 2024.
- GDP per capita (USD): **$52,430** as of December 2023.
- Currency: **Pound Sterling** (GBP).
- Exchange Rate: **1 GBP = 1.94 AUD** (05/02/24).
- Mercer's 2023 Quality of Living Ranking: The UK's highest-ranking city is **London at 45**, followed by **Aberdeen at 49** and **Edinburgh at 51**.
- Human Development Index: **0.929** and ranked **18th** as of 2021.
- Logistics Performance Index: **3.70** and ranked **19th** globally as of 2023.

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
    - The UK has more than 100 Bilateral Investment Treaties in force or signed with its partner countries.
    - The UK is also a party to the newly signed EU - United Kingdom Trade and Cooperation Agreement and the Central America - United Kingdom Association Agreement.

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

Demographic Indicators

- Total Population: Approximately **67.96 million** as of January 2024.
- Expatriate Population: Approximately **9.5 million** as of 2022 as per the Migration Observatory.
- Population Growth: **0.34%** as of 2023.
- Median Age: Approximately **40.60** years old.
- Urban Population: **84.4%** as of 2023.
- **Population Ethnicity:**
  - 86% White
  - 7.5% Asian
  - 3.3% Black
  - 3.2% Other (Mixed, Arabic)
- **Dominant Religious Groups:**
  - 59.1% Christian
  - 25.1% No religion
  - 4.8% Muslim
  - 11% Other (Hindu, Sikh, Jewish, Buddhist)

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

Consumer Behaviour & Societal Trends

Key Trends:

- Despite a challenging year defined by low rates of economic output, consumer sentiment in the UK is set to slowly rebound back as British shoppers gain confidence in their personal finances.
- COVID-19 has seen a decline in discretionary spending as consumers adapt to tightening budgets. Around 65% of shoppers have reduced spending on non-essential products and 37% of consumers have been seeking cheaper alternatives in 2020 (McKinsey). Similarly, 40% of online shoppers considered clearance websites during the pandemic.
- Consumers in the UK are moving away from brand loyalty due to changing priorities. In 2020, 72% of consumers chose to switch brands in search for better value overall. Availability was also a driving factor for consumers to search for another brand or product.
- 86% of British consumers value convenience when online shopping and 69% prioritise convenience when making physical purchases.
- Responsible consumption is on the rise as consumers seek out brands and products that align with their values. Consumers are choosing to engage more with sustainable or eco-friendly products. A Kantar Smart Shopper study found that 62% of shoppers valued at least one aspect of sustainability (e.g. biodegradable packaging) when purchasing products. Consumers are also increasingly participating in circular economies with eBay recording a 30% growth in second sales during June 2020.
- Healthier eating habits are also influencing consumer preferences with UK shoppers spending an extra 1.4 million pounds on organic products per week in 2020. Meat-free and free-from products are growing in popularity, driven by more health-conscious younger generations.

- British shoppers are more likely to buy products if they believe the brand goes above and beyond to offer a personalised experience. 25% of consumers prefer brands that make them feel 'special' while 70% of UK and US shoppers expect a tailored product experience.

- As Brexit stokes nationalistic sentiments, a percentage of British shoppers are also shifting their product preferences to local brands. 60% of consumers surveyed stated that the origin of the product would be as important as the pricing. Shoppers are also inclined to support local businesses during the pandemic with Waitrose finding that 74% of shoppers would like to see more UK-based businesses.

Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

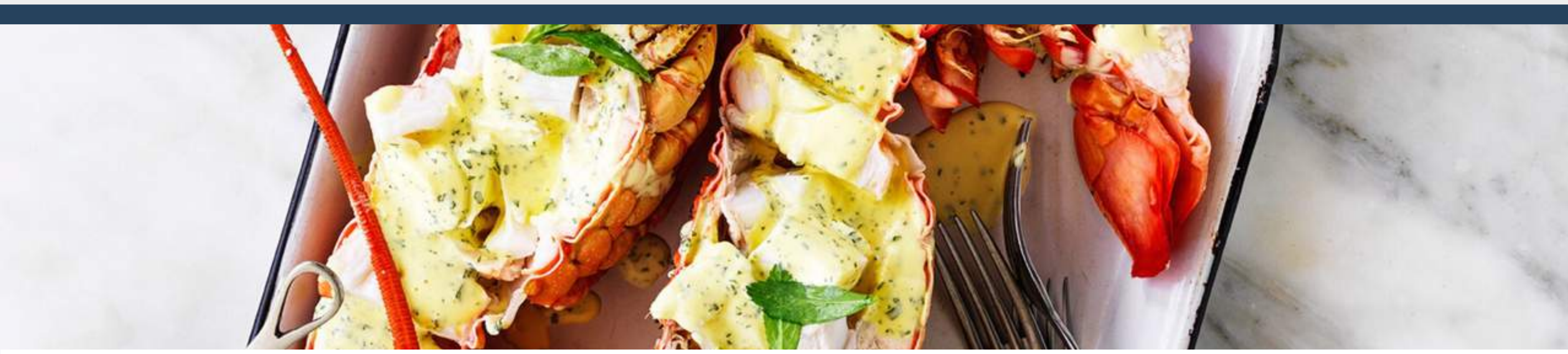
- The British spend on average per day 5 hours 28 minutes on the internet and nearly 2 hours on social media.

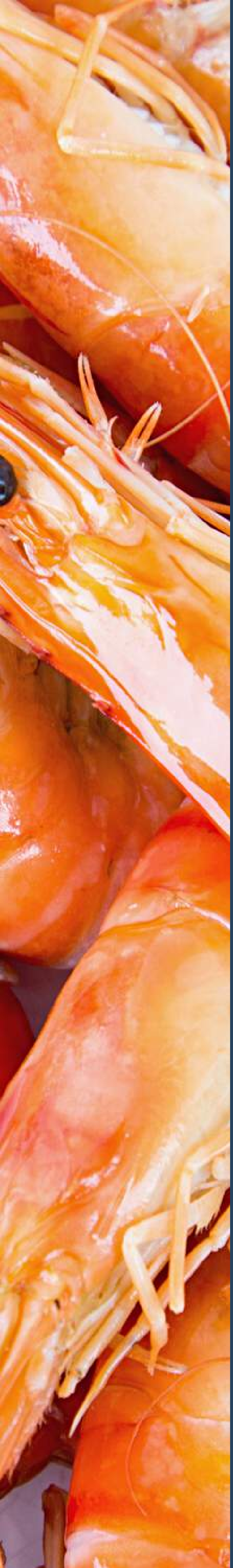
- In the UK, there are 65 million internet users on any device with a penetration rate of 96%.

- According to the 'Digital 2020' report, 45 million British people are active social media users with a penetration rate of 66%. This is a growth of 2.9% in social media users over the past year.

- Youtube is the most visited social media site at 78%, followed by Facebook at 73%, Whatsapp at 62%, and Facebook Messenger at 58%.

Source: Digital in 2021 Report



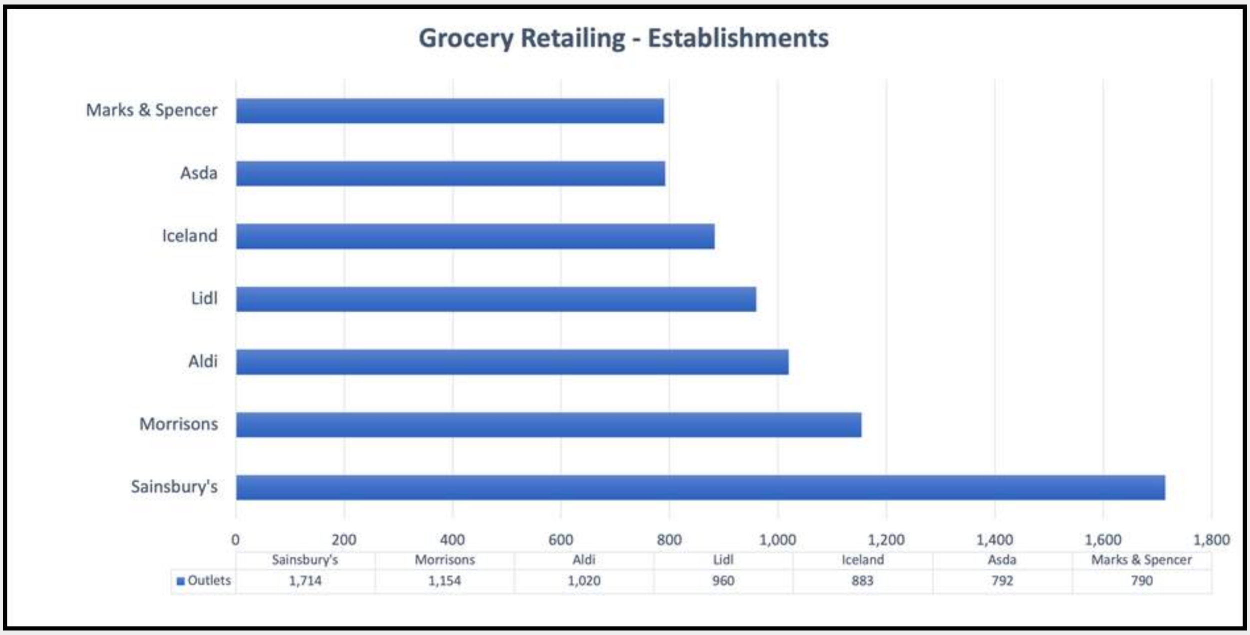


Grocery Retail Channel Developments

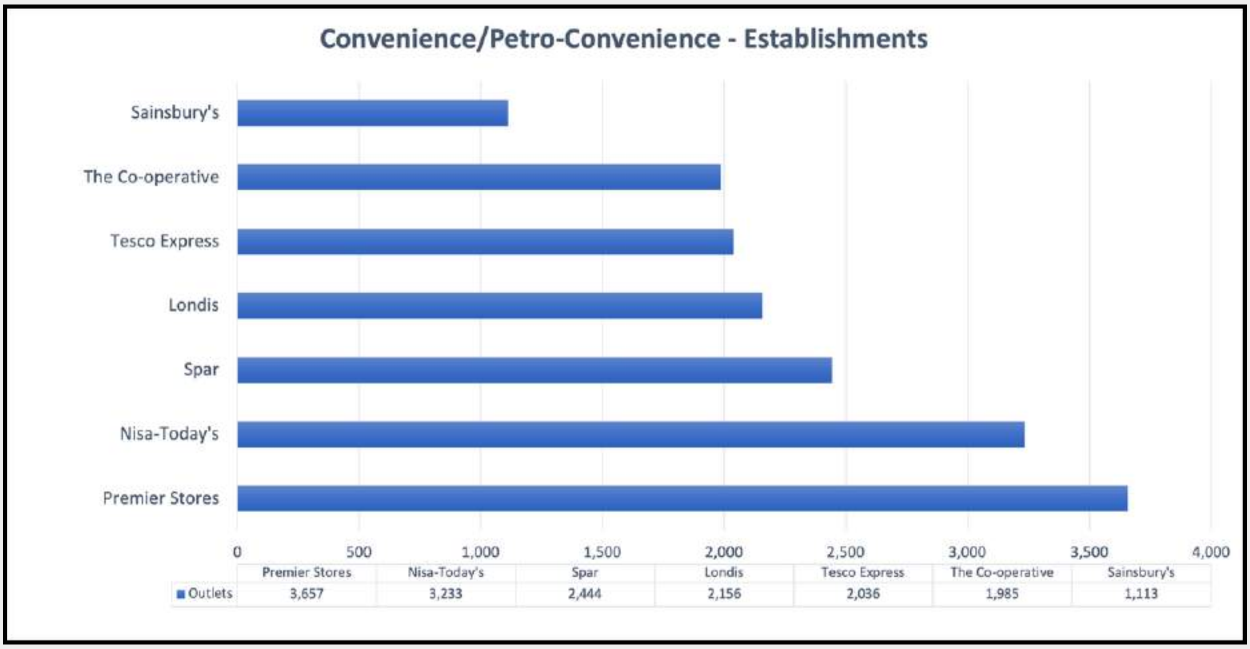
Key Trends:

- Total grocery sales grew throughout 2020 as UK consumers flocked to supermarkets. At its height, the sector saw a 20.6% increase in sales during March 2020.
- Convenience stores have experienced accelerated growth rates during COVID-19, accounting for 16.3% of all grocery sales during April 2020. Customers are seeking convenience during uncertain times, choosing to shop locally rather than risk their health and safety by travelling.
- Supermarkets are increasingly adopting an omnichannel approach to maximise customer engagement. 2020 has seen major outlets accelerating the growth of their online platforms to match consumer demand. Collaborations between existing e-commerce retailers and physical stores have also proven to be popular with Amazon Prime launching a partnership with Morrisons, allowing customers to pick up their Amazon Fresh purchases at their local grocery store.
- Government interventions will lead to an increase in supermarket formats that encourage healthier eating habits. Restrictions set to come into force in 2022 will prevent supermarkets from displaying unhealthy food or drinks at checkouts or at the entrances of stores. The People’s Supermarket and Planet Organic, which house organic products, are some of the independent stores establishing their presence in the health food market.
- The biggest strategy for grocery retailers currently is to maximise store safety by adhering to hygiene recommendations. Outlets are also reducing prices to increase customer retention.
- Discount stores are on the rise as Aldi and Lidl increase the pressure on traditional supermarkets to offer more value to their customers.

Grocery Retailing Brand Outlets:



Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- 2020 has been a challenging year for both limited-service and full-service restaurants with the pandemic forcing closures and leaving outlets with uncertain futures. However, the UK government has continued to provide support to the hospitality industry with grants, loans and the implementation of a "Eat out to help out" scheme.

- Restaurants have responded to restrictions by reconfiguring their business models to encompass home delivery, either through in-house delivery or through third-party platforms like Uber Eats or Deliveroo. 2020 has seen a 21% growth in online delivery revenue as consumers increase their engagement with food delivery services.

- Evidence from consumer expenditure data shows that UK restaurant spending by households in April and May 2020 was 30% of its total in the same months of 2019 (Surico et al, 2020).

- Increasingly, restaurants are enhancing their digital systems by integrating QR code menus, mobile ordering, and other remote ordering options to meet consumer demand for convenience during COVID-19. This trend is also increasing in popularity for limited-service restaurants chains as consumers express discomfort at using touchscreen ordering systems during the pandemic.

- As a result of disruptions to physical services, full-service restaurants have also been offering innovative products to stay afloat. Dishoom targeted DIYers by selling cocktail kits while Mother Kelly rolled out Christmas hampers containing craft beers.

- Brexit is also likely to see restaurants shift towards using more home-grown produce as imported goods face new tariffs.

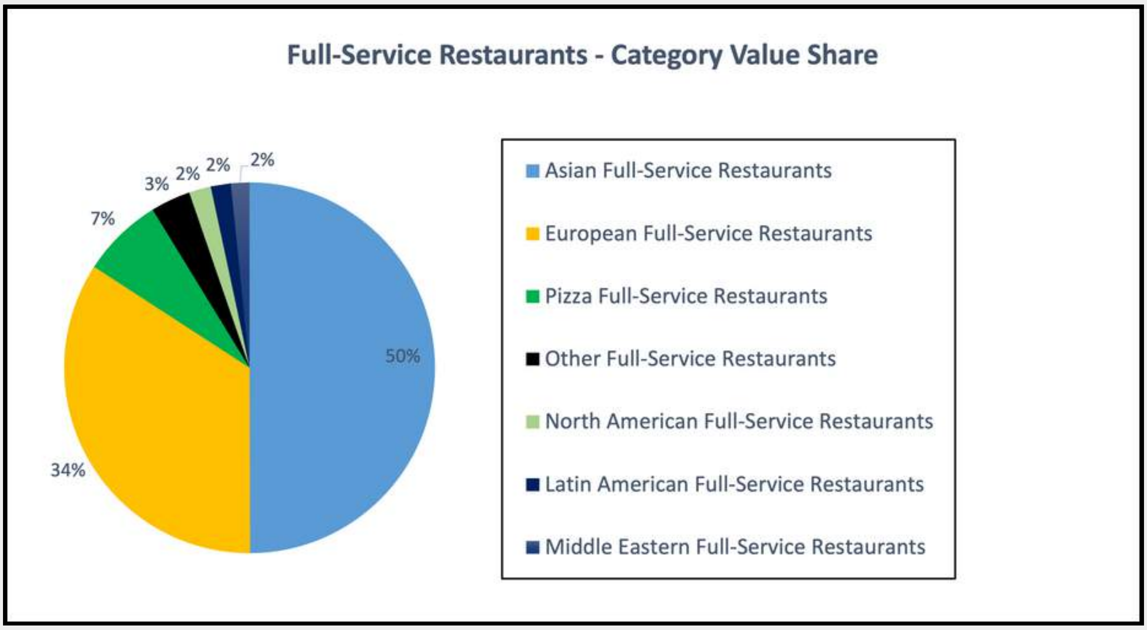
- As demand for food delivery grows, Dark/Cloud kitchens have increased in popularity. These portable kitchens can service multiple operators at a time and are designed especially for businesses to minimise costs when offering food delivery.

- When COVID-19 restrictions ease, alternate foodservice formats are likely to increase in number as consumers seek out enhanced dining experiences. Food halls, which house specialty restaurants under one roof, are set to continue to become fashionable as will pop-up restaurants like at 10 Heddon St, Mayfair.

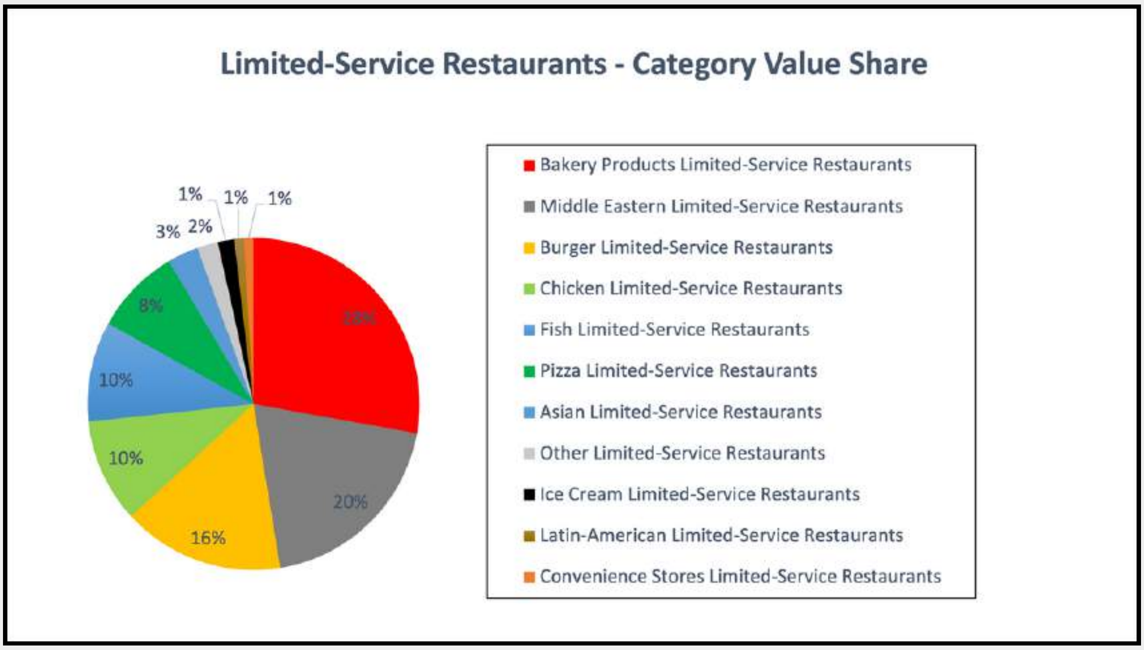
- Healthier food options will populate limited-service and full-service restaurants menus more and more. Vegan, vegetarian and gluten-free menu items are increasingly requested by consumers, as are organic and natural ingredients.

- Asian full-service restaurants dominate the sector, followed by European full-service restaurants. The growth in popularity of international cuisine is unsurprising as a Sacla survey found that 70% of British adults rated an international food choice as their favourite cuisine.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Food & Drink e-commerce has experienced substantial growth across 2020. In June, online sales rose by 91% and a predicted 20% of all British shoppers were using e-commerce platforms for their groceries.
- Major supermarkets like Tesco, Asda and Iceland have turned towards optimising their existing online operations to match the surge in consumer demand. Companies have implemented strategies such as 1-hour delivery times, customer rewards and 1 pound delivery fees in a bid to attract more customers.
- However, supermarket chains have found it hard to keep up with the hike in demand. Waitrose opened a new warehouse allowing the chain to double its online deliveries while other chains have increased staff hires and "dark store" locations.
- Sustainability still remains a priority for some online grocery retailers with Sainsbury's introducing eco-friendly green slots to urge customers to share delivery slots with other people in their area.
- COVID-19 has seen food wholesalers shift towards direct-to-consumer strategies by setting up online ordering platforms. Brakes launched a 'Food Shop' service while The Sausage man, a German wholesaler, set up a 24-hour online shopping service without a minimum order requirement.
- Meal kits and recipe boxes have risen exponentially in popularity during 2020. Mindful Chef, a UK based recipe box company, saw a 452% increase in customer numbers and a 387% increase in frozen meal sales. Similarly, HelloFresh struggled to keep up with consumer demand as interest in food subscription boxes hit record highs.
- Online alcohol sales have also been steadily rising during lockdown with consumers stocking up on beer, spirits and wine. In March 2020, Master of Malt, an online beverage company, recorded nearly a 200% increase in online orders. In the same month, spirit sales grew by 23% in comparison to the same time a year ago.

Key E-tailers:

- Ocado is the UK's largest online-only supermarket. Recently, the platform has partnered with Marks & Spencers to offer customers access to a wide range of premium products.
- Amazon Fresh is also a popular choice for online grocery shoppers.
- Most major brick and mortar supermarket chains are all offering online grocery shopping services. The most popular e-commerce platforms include Tesco, Sainsbury's, Waitrose and Morrisons.

Source: Euromonitor

Seafood Consumption in the UK

- Fish and seafood supply per person in the UK is valued at 19.73 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:

- Department for Environment, Food & Rural Affairs (Defra)
- Food Standards Agency (FSA)

Product Registration/Import Procedure:

- The UK is currently undergoing a transitional phase in a post-Brexit reality. Certain regulations are expected to be rolled out in phases throughout 2021. Pre Brexit regulations are as follows:
  - An EORI number is required for importers in the UK.
  - Animal products and live animal imports may require a UK health certificate while certain products like starter cultures will require an import license.
  - The products must also satisfy other specific regulations including labelling and packaging requirements before entry is allowed into the UK market.

Documentation Required:

- Commercial Invoice: Two copies are needed and the invoice must include a clear description of goods, terms of sale, gross and net weights, and the country of origin.
- Bill of Lading: Minimum two copies are required.
- Packing list.
- Certificate of insurance: Useful but not required.

General Labelling Requirements:

- In general, food labels must contain the legal name of the food and use metric units of measurement. Other requirements include:
  - Weight and dimension
  - Country of origin
  - Composition of ingredients
  - Allergen warnings
- However, each food category may have separate requirements that need to be followed (e.g. Fish need to be labelled with the commercial and scientific name, the production method and the catch area).

Packaging Requirements:

- There are no specific packaging requirements. However, if your company qualifies as a 'obligated packaging producer', there are regulations in place to ensure that packaging waste is minimised.

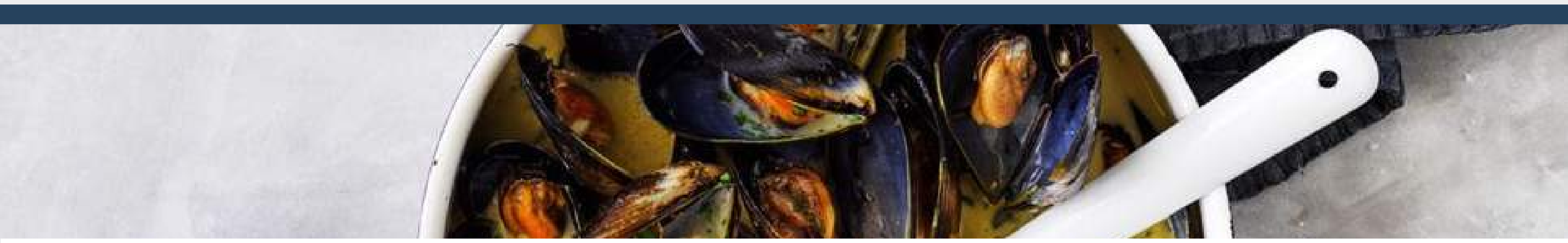
Non-Tariff Barriers:

- Animal products are only able to enter the UK through Designated Points of Entry.
- All imported food and beverage products may also be subject to three levels of consignment checks - documentary, identity and physical inspections. At the port of entry, documentation will be checked to ensure certificates are up to date and match with commercial documents. Labelling and packaging will be checked in the identity stage and a percentage of goods will undergo a physical inspection to ensure the products meet food safety standards.

Tariffs Levied:

- From January 2021, UK Global Tariff rates will apply. The average tariff will be around 5.7%. Exceptions will apply for countries with a UK trade deal, including Australia, or are a part of the UK Generalised Scheme of Preferences.

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



Australia and United Kingdom Free Trade Agreement (A-UK FTA)

- The Australia-United Kingdom Free Trade Agreement (A-UKFTA) was signed virtually on 17 December 2021 and will be tabled in both of Australia's Houses of Federal Parliament, with a National Interest Analysis, and considered by the Joint Standing Committee on Treaties (JSCOT).

- JSCOT will table a report on the A-UKFTA including a recommendation as to whether binding treaty action should be taken. Following JSCOT's report, any legislative changes required to implement the treaty domestically must pass both Houses of Parliament.

- Once the domestic procedures have been completed, Australia and the UK will provide each other with confirmation of their completion through an exchange of diplomatic notes, and the agreement will enter into force 30 days later, or on any other date that is mutually agreed.

- For the seafood industry, the A-UK FTA will mean significant market access outcomes including immediate reduction on most Australian seafood.

- On some products such as lobster, crabs, scallops, shrimps, coquilles and aquatic invertebrates, tariffs will be reduced over a staggered period with all categories free of tariffs on 1 January on year four. This is known as staging category 'B4' and items under this category along with the full list of tariffs and their corresponding schedule is available on the DFAT website.

- More information about the A-UK FTA is available on the DFAT website or through the Free Trade Agreement Portal.

Category Data

Fish and Seafood in the UK

Key Trends:

- Even as retail sales increase, this has not been enough to compensate the loss faced by the foodservice and institutional sectors.

- The pandemic and the subsequent impact on total volume sales has impacted the fish and seafood industry with strong declining demand in 2020. With lockdowns being imposed and the consequent closing of restaurants, cafés, pubs and institutions, sales within the foodservice and institutional sectors have nosedived.

- However, as more consumers have been forced to social distance and stay home, at-home cooking has increased, resulting in an increase in retail volume sales, especially during the initial period of panic-buying. This stockpiling led to the retail volume sales of fish and seafood increasing from minimal growth in 2019 to an 8% retail volume growth in 2020. Nevertheless, this increase in retail sales was not enough to compensate for the loss in the foodservice and institutional sectors.

- When the country was first placed under lockdown in March 2020, many consumers made the move to e-commerce so that they could avoid the risk of contracting the virus while shopping at their usual physical stores. This was especially true of older consumers and those who were more vulnerable in terms of health and immunity.

- With the decrease in foodservice and institutional sales and the simultaneous reduction in exports, the demand for fish and seafood was lower as compared to the supply. Multiple fish sellers adapted to the new normal and addressed customer needs by setting up online ordering platforms and home delivery services so that the surplus supply could be sold directly to consumers. This has resulted in a marked increase in the online sales of fish and seafood in 2020.

- It is predicted that due to the economic impact of the pandemic and the resulting instability, consumers will remain sensitive to prices, especially during the early forecast period. Even though fish and seafood are higher in nutritional value, consumers may switch to alternative, cheaper proteins such as eggs, in order to lower expenses. As a result, it is expected that fish and seafood will continue to see a decrease in retail volume sales throughout the forecast period. However, as more consumers return to on-trade establishments, foodservice and institutional volume sales will begin to rise. As a result, the fish and seafood industry is expected to return to pre-pandemic levels seen in 2019 at the end of the forecast period.

- 2020's lockdown periods have increasingly impacted international trade, while simultaneously bringing into focus Britain's reliance on exports for its supply of fish and seafood. As a means of reorienting the domestic market, more British consumers are trying local fish and seafood, which is available at a cheaper price. Taking into consideration the continued impact of Brexit on exports, this trend towards local fish supplies is expected to continue throughout the forecast period.

- In order to boost sales, the government is expected to launch several communication and marketing strategies aimed at highlighting the advantages of local fish and seafood. These are expected to be the sequel to the #SeaForYourself drive of the Department for Environment, Food, and Rural Affairs (Defra) and Seafish, that ran for three months in 2020. This effort focused on educating British consumers on the health benefits and better taste of local products, thereby hoping to increase sales of fish and seafood caught locally, while also providing consumers with cooking advice and how to prepare fish and seafood.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
United Kingdom	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	636.50	3.37
				2027	866.63	6.37
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	1,635.82	3.38
				2027	2,264.58	6.72
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	1,195.19	1.66
				2027	1,525.36	5.00
		Dried Fish & Seafood	Dried Fish & Seafood	2022	11.92	3.06
				2027	16.32	6.48
		Fresh Fish & Seafood (Counter)	Fish	2022	366.41	3.34
				2027	419.51	2.74
			Shellfish	2022	268.85	.88
				2027	330.94	4.24
		Frozen Fish & Seafood	Frozen Processed Fish	2022	981.20	2.35
				2027	1,325.59	6.20
			Frozen Whole Cuts Of Fish & Seafood	2022	351.36	1.86
				2027	442.91	4.74

Source: GlobalData, 2024

ITC - Trade Data

Crustaceans, Live, Fresh, Chilled in the UK

UK - 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	512,743	47,539	-5	-1	-3
1	India	129,156	13,482	-3	5	3
2	Vietnam	96,803	8,551	-18	-3	-5
3	Ecuador	66,310	8,077	2	28	29
4	Bangladesh	48,282	3,118	-3	-6	-11
5	Camada	40,393	1,486	26	12	-3
6	Honduras	34,561	2,960	28	4	5
7	Nicaragua	14,486	1,190	18	13	14
8	Thailand	13,191	1,116	-26	-12	-14
9	France	7,351	514	45	-21	-23
10	Indonesia	6,153	545	95	-3	2

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 UK

UK - Trade Data - HS Code 160530 Lobster, Prepared or Preserved (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	5,443	262	-31	-8	-6
1	Canada	5,361	258	-7	4	13
2	United States	45	1	-79	13	-39
3	France	26	3	659	-71	-44
4	Denmark	11	0	-99	-67	-
5	Ireland	-	-	-	-	-
6	United Arab Emirates	-	-	-	-	-
7	Hong Kong	-	-	-	-	-
8	United Kingdom	-	-	-	-	-
9	Belgium	-	-	-	-	-
10	India	-	-	-	-	-

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

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<tr><th>Rank</th><th>Country</th><th>Exported Value (USD Thousand)</th><th>Quantity Exported (Tonnes)</th><th>Annual Growth in Exported Value % (Short-term '21 - '22)</th><th>Annual Growth in Exported Value % (Long-term '18 - '22)</th><th>Annual Growth in Exported Quantity % (Long-term '18 - '22)</th></tr>
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Source: ITC Trade Map, 2023

ITC - Trade Data

Live, Fresh or Chilled Rock Lobster in the UK

UK - 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	14	0	-	-	-
1	Ireland	13	0	-	-	-
2	Sri Lanka	1	0	-	-	-
3	Hong Kong, China	-	-	-	-	-
4	Malaysia	-	-	-	-	-
5	Singapore	-	-	-	-	-
6	France	-	-	-	-	-
7	China	-	-	-	-	-
8	Norway	-	-	-	-	-
9	Portugal	-	-	-	-	-
10	Spain	-	-	-	-	-

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 UK

UK - 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	2598	50	50	-8	-29
1	Bahamas	1959	32	32	-	-
2	Jamaica	166	3	3	-	-
3	Colombia	162	3	3	-	-
4	United Kingdom	157	5	5	-	-
5	Saint Helena	51	2	2	-	-
6	Spain	43	1	1	-	-
7	Argentina	34	3	3	-	-
8	South Africa	21	2	2	-	-
9	Ireland	2	0	0	-	-
10	Italy	2	0	0	-	-

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 UK

UK - 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	22,711	569	18	21	11
1	Canada	21,347	542	30	56	35
2	France	870	15	236	-44	-37
3	United States of America	378	7	-65	-26	-41
4	Türkiye	46	1	-	-	-
5	Germany	32	1	-88	-56	-62
6	United Kingdom	32	1	-	-	-
7	Pakistan	5	1	-	-	-
8	Portugal	1	0	-	-	-
9	China	-	-	-	-	-
10	Spain	-	-	-	-	-

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 UK

UK - 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	17,730	836	3	-6	-13
1	Canada	15,916	733	14	-7	-15
2	United States of America	1,203	66	-61	0	-5
3	Ireland	419	21	-	142	-
4	United Kingdom	109	5	-	-	-
5	Spain	29	0	-	-41	-
6	Denmark	29	10	-	-	-
7	Bahamas	24	0	-	-	-
8	France	-	-	-	-	-
9	Portugal	-	-	-	-	-
10	China	-	-	-	-	-

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 UK

UK - 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	2,298	761	-14	-22	-13
1	Vietnam	1,204	437	23	7	-4
2	India	773	289	-24	17	16
3	Ireland	259	33	670	-48	-49
4	Denmark	23	1	-96	-62	-67
5	France	19	1	798	-	-
6	United Kingdom	11	1	-	-	-
7	Spain	4	0	-	-	-
8	Italy	3	0	-	-46	-
9	China	1	0	-	-85	-
10	Netherlands	-	-	-	-	-

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 UK

UK - 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	426	7	-	143	63
1	Belize	426	7	-	-	-
2	Bahamas	-	-	-	-	-
3	France	-	-	-	-	-
4	Denmark	-	-	-	-	-
5	United States of America	-	-	-	-	-
6	Morocco	-	-	-	-	-
7	Mozambique	-	-	-	-	-
8	Yemen	-	-	-	-	-
9	Spain	-	-	-	-	-
10	Vietnam	-	-	-	-	-

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

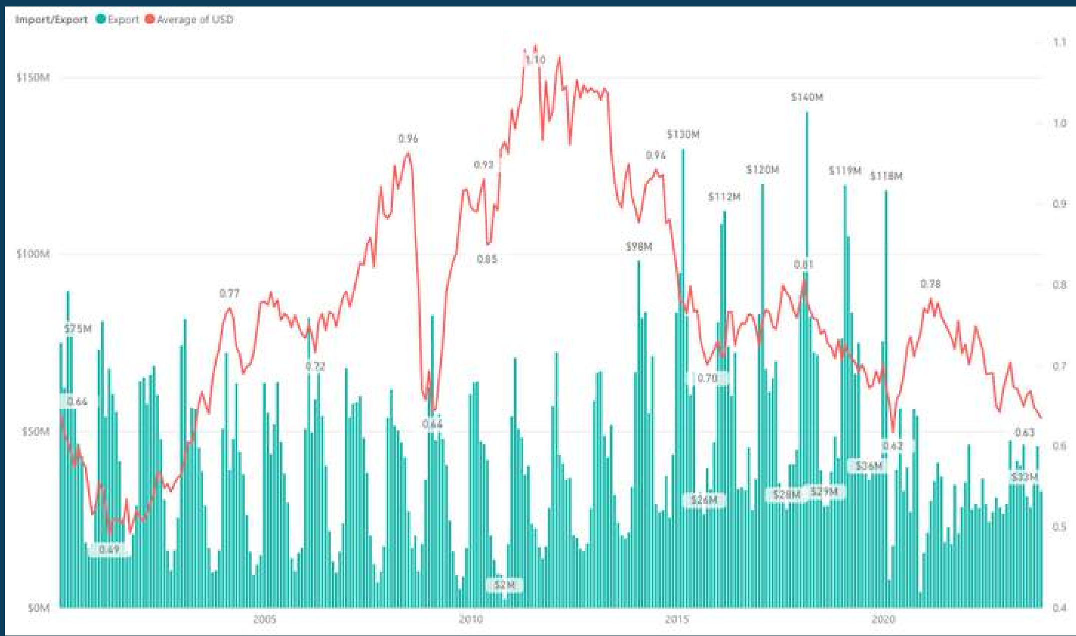
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	32	1	-25	64	-38
1	Malaysia	32	1	-	-	-
2	Saudi Arabia	-	-	-	-	-
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	$836,618,461
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

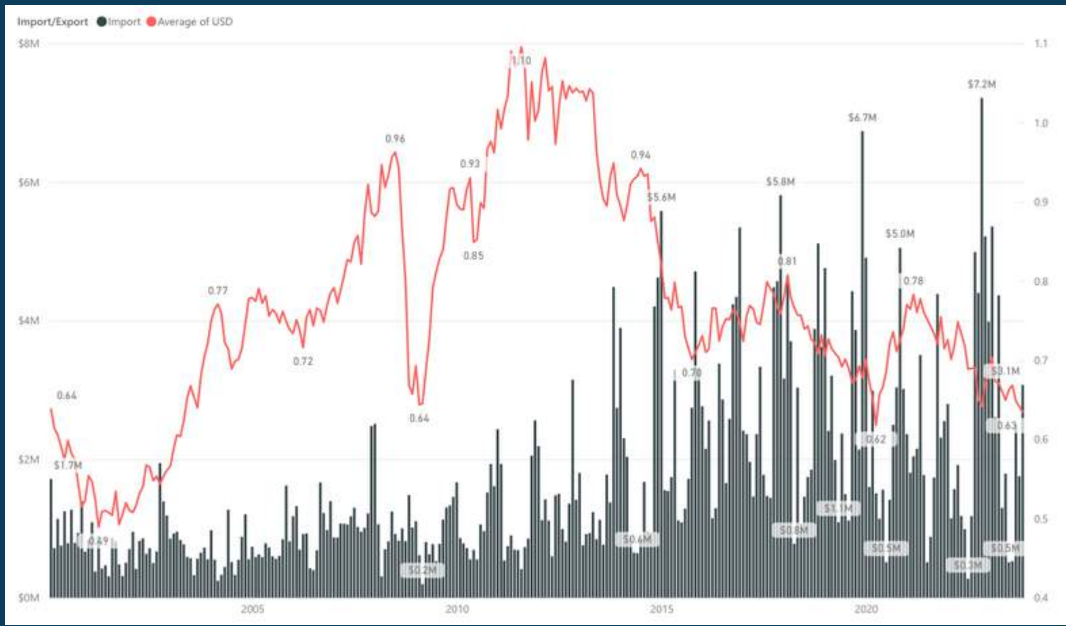
Export Value by State

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

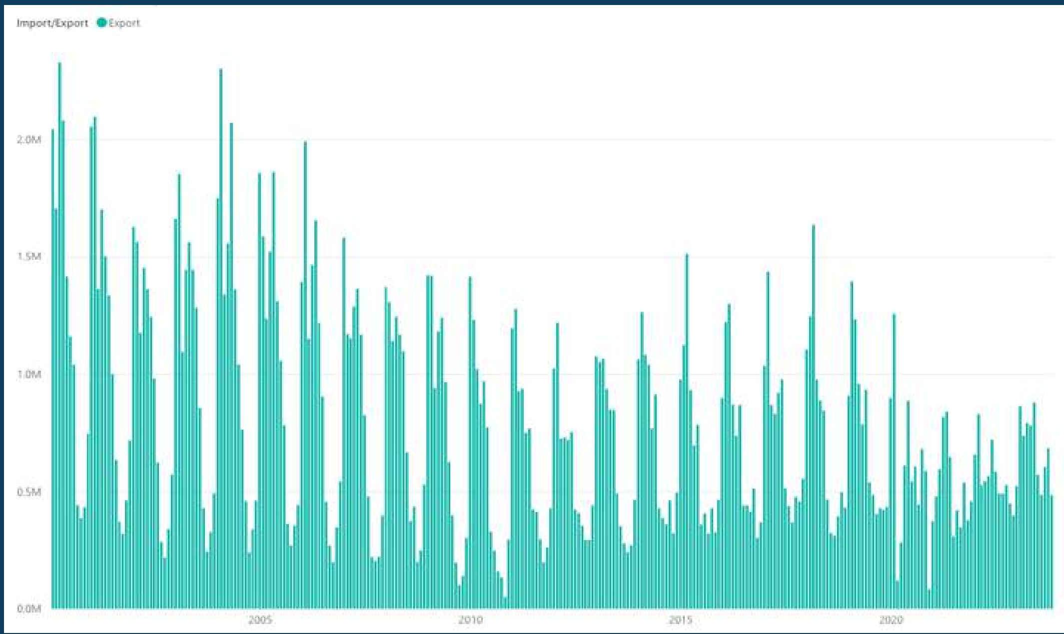
Import Value by State

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

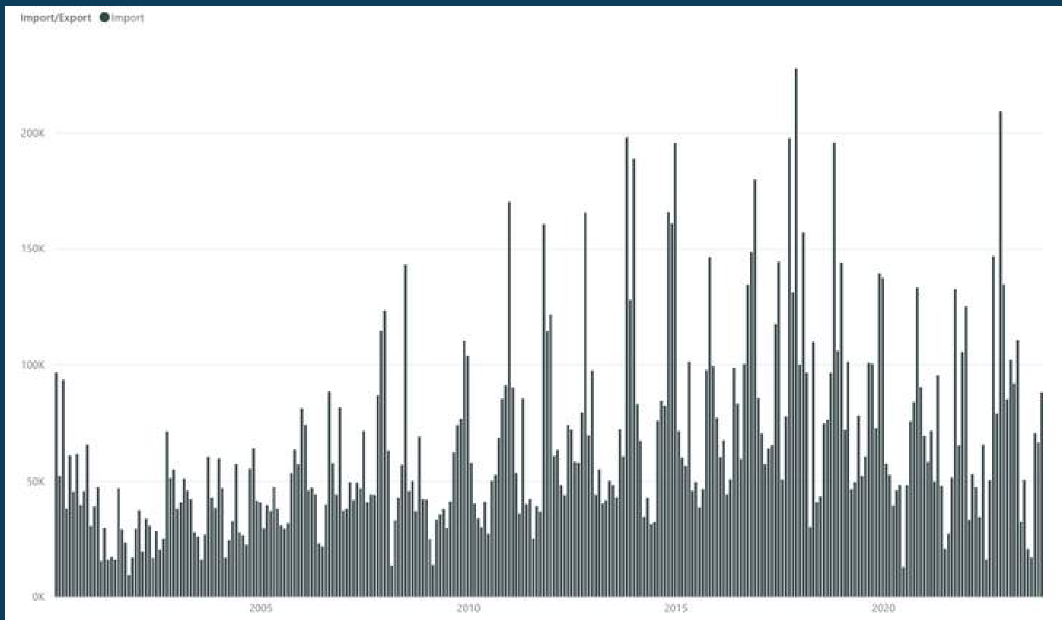
Export Volume by State

Source: FRDC, 2023

FRDC - Trade Data

Lobster Imports - Volume

AUS - Trade Data - Species: Lobster <u>(Imports):</u>



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

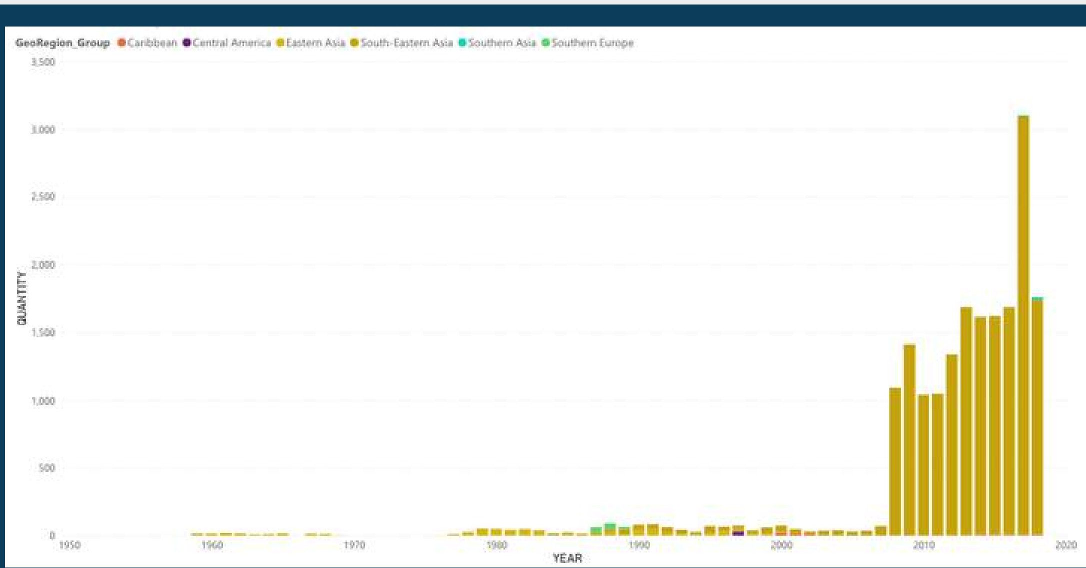
ASFIS Species: Lobsters, spiny-rock lobsters

Production

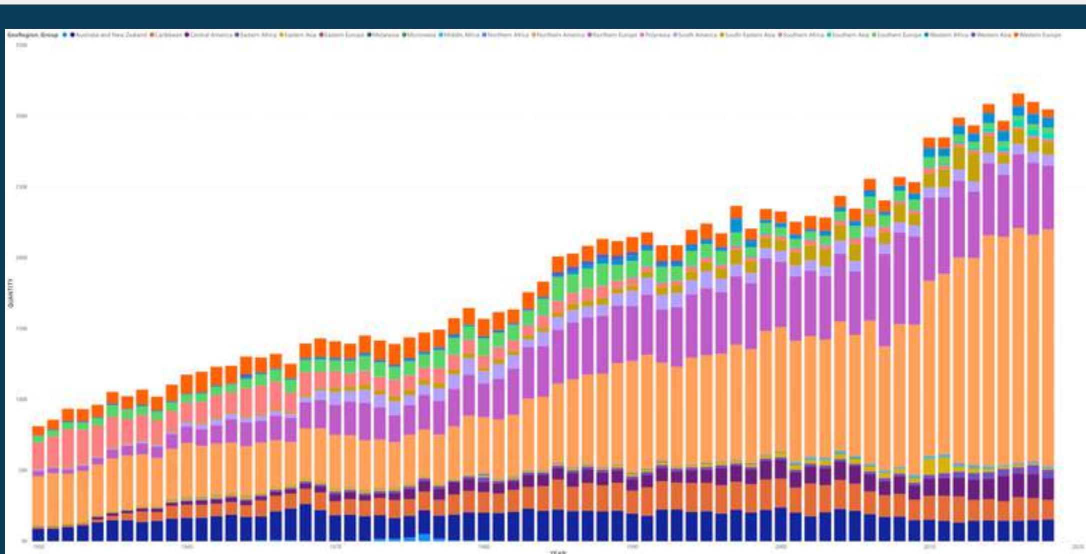
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	7 317	7 215	9 922
United Kingdom	Tonnes – net product weight	20 810 E	17 812 E	22 886

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	278 992	341 450	558 112
United Kingdom	Value (USD 1000)	299 251	203 933	277 034

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 - UK Market Overview

Austrade - UK Market Profile

DFAT - UK Country Brief

DFAT - UK Market Insights

Enterprise Singapore - UK Market Profile

FoodExport - UK Country Profile

HKTDC Research - UK Market Profile

Santandar Trade Markets - UK Market Overview

USDA - UK Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - UK Consumer Profile

GWI - UK Consumer Snapshot

Santandar Trade Markets - Reaching the British Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - UK E-commerce Channel Overview

Agriculture and Agri-Food Canada - UK Fish and Seafood Sector Overview

Euromonitor International - UK Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - UK Foodservice Overview

USDA - UK Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - UK Investment Policy Hub

USDA - UK Import Regulations & Standards

DFAT - A-UK 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

Contact Us

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