UK Market Summary & Category Data for Fish & Seafood - Salmon

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 gooes 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:

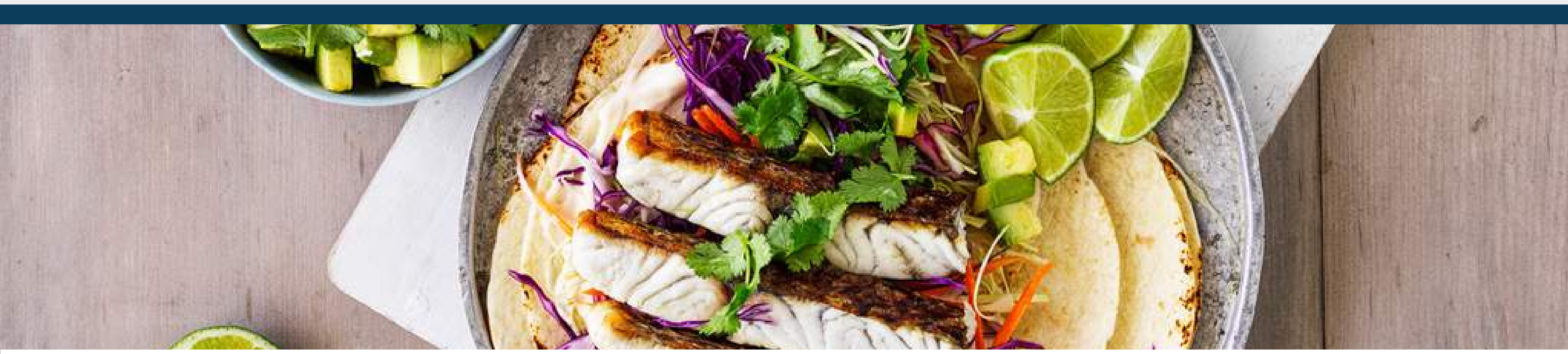
- The British spend on average per day 5 hours 28 minutes on the internet and nearly 2 hours on social media.

- 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

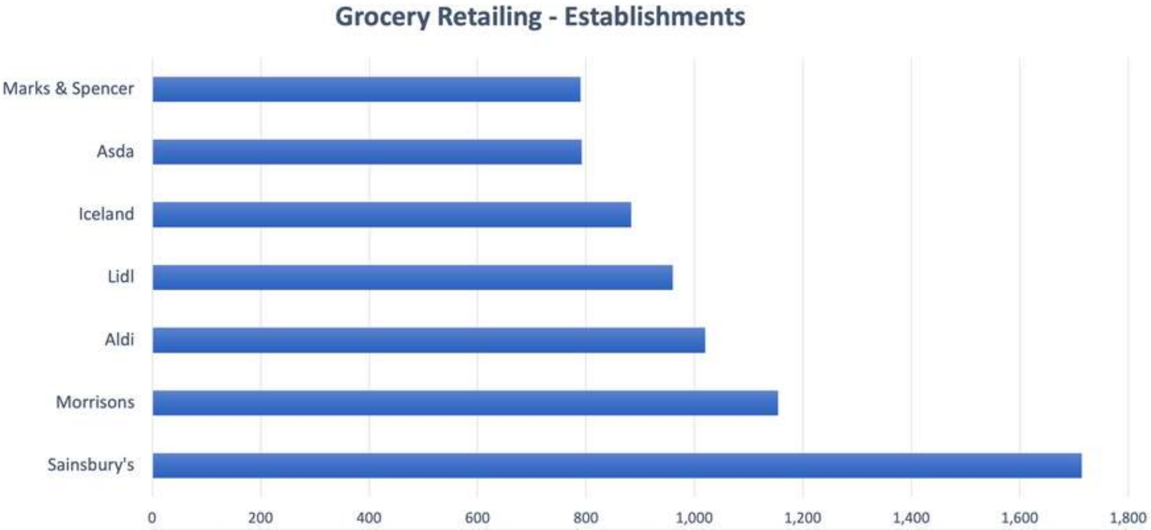


Grocery Retail Channel Developments

Key Trends:

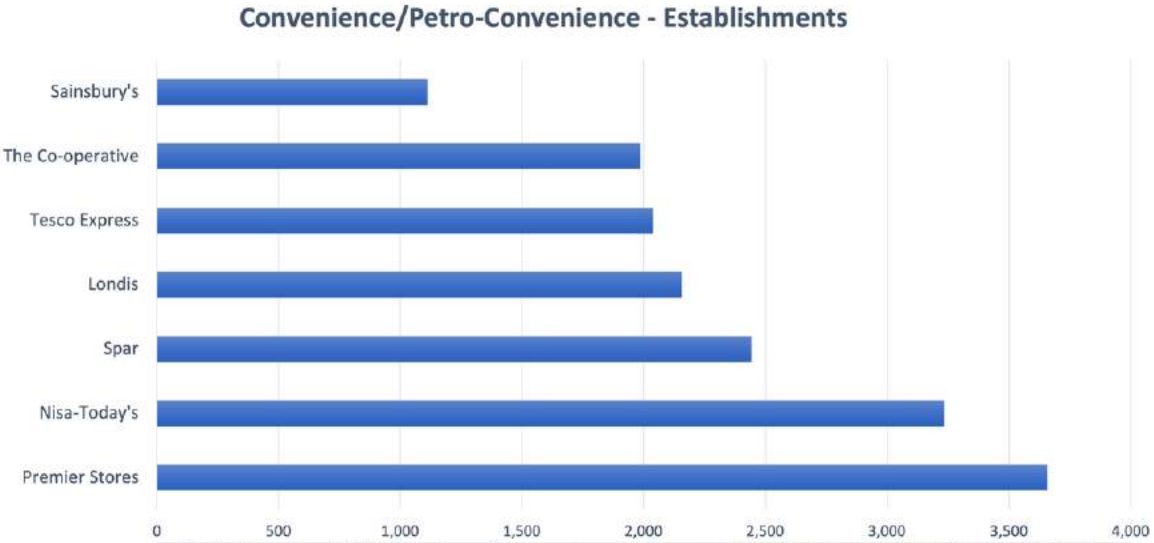
- Total grocery sales grew throughout 2020 as UK consumers flocked to supermarkets. At its height, the sector saw a 20.6% increase in sales during March 2020.
- Convenience stores have experienced accelerated growth rates during COVID-19, accounting for 16.3% of all grocery sales during April 2020. Customers 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:



	Sainsbury's	Morrisons	Aldi	Lidl	Iceland	Asda	Marks & Spencer
Outlets	1,714	1,154	1,020	960	883	792	790

Convenience/Petro-Convenience Brand Outlets:



	Premier Stores	Nisa-Today's	Spar	Londis	Tesco Express	The Co-operative	Sainsbury's
Outlets	3,657	3,233	2,444	2,156	2,036	1,985	1,113

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 amongst limited-service restaurant 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.

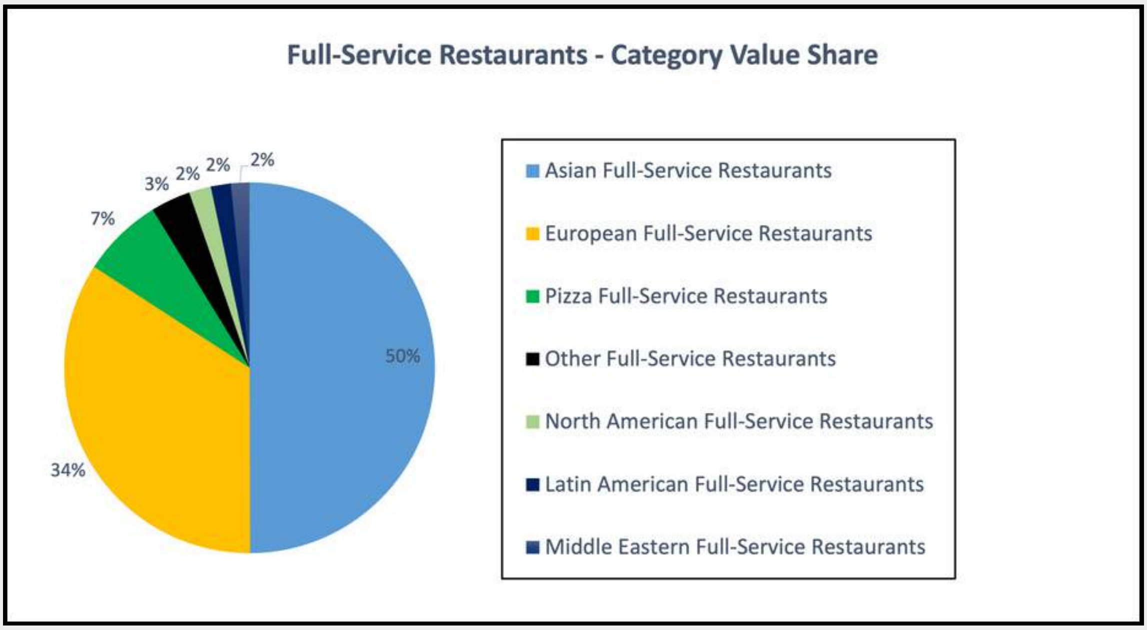
- As demand for food delivery grows, Dark/Cloud kitchens have increased in popularity. These portable kitchens can service multiple operators at a time and are designed especially for businesses to minimise costs when offering food delivery.

- 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.

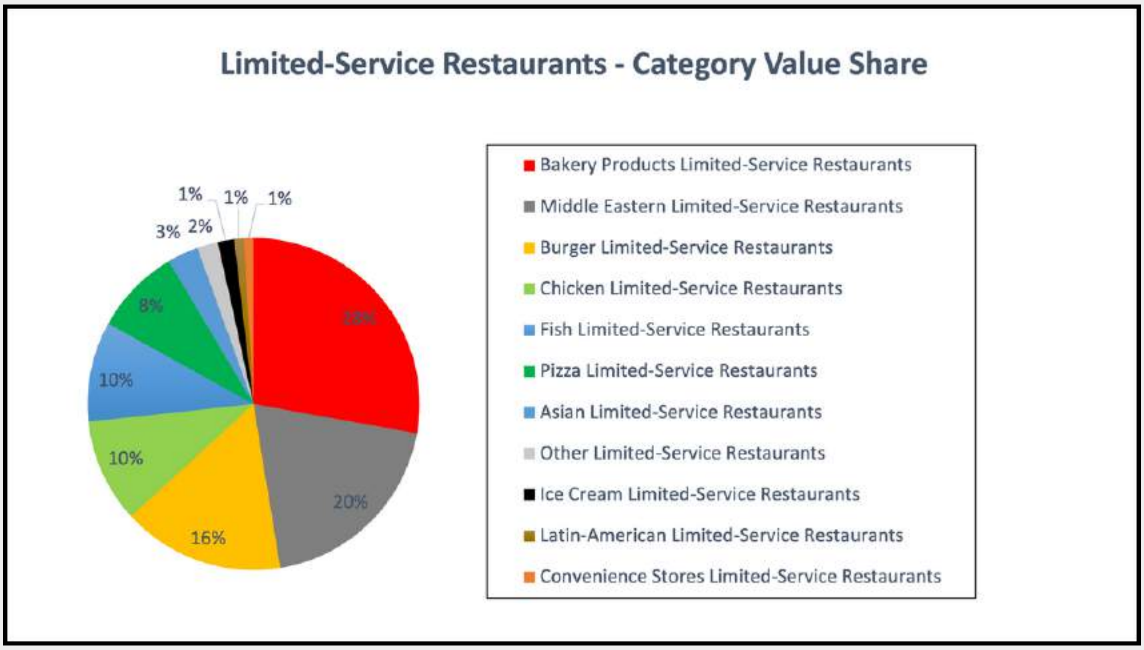
- Healthier food options will populate limited-service and full-service restaurants menus more and more. Vegan, vegetarian and gluten-free menu items are increasingly requested by consumers, as are organic and natural ingredients.

- 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:

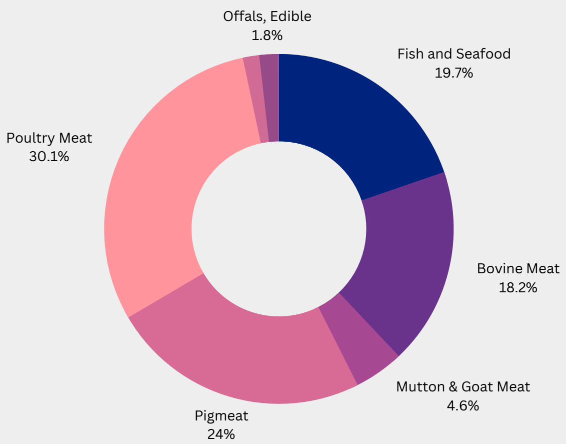
- Ocado is the UK’s largest online-only supermarket. Recently, the platform has partnered with Marks & Spencers to offer customers access to a wide range of premium products.
- Amazon Fresh is also a popular choice for online grocery shoppers.
- Most major brick and mortar supermarket chains are all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

Source: Euromonitor

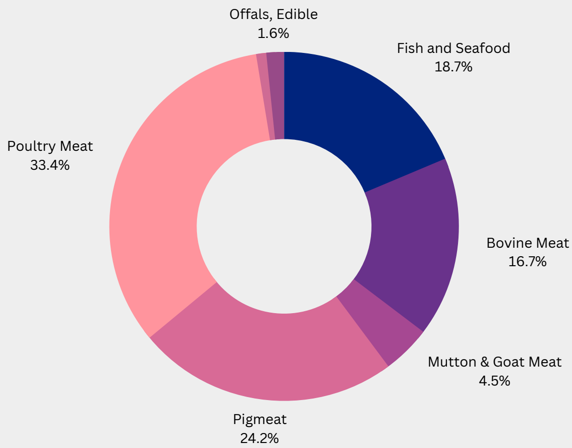
Seafood Consumption in the United Kingdom

- Fish and seafood supply per person in the UK is valued at 18.49 kg as of 2019 according to the United Nations Food and Agricultural Organization (FAO). This value has declined by 0.37% annually between 2014 - 2019, having been previously recorded as 18.84 kg in 2014.
  - 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
- Other meat alternative consumption values per capita in 2019 were:
  - Bovine Meat: 16.52 kg
  - Mutton & Goat Meat: 4.45 kg
  - Pigmeat: 23.95 kg
  - Poultry Meat: 33.14 kg
  - Meat, Other: 0.93 kg
  - Offals, Edible: 1.62 kg

2014 Protein Consumption* - Food Supply (%)



2019 Protein Consumption* - Food Supply (%)



- * This graph does not take into account grain and cereal products, rice products, roots, potatoes, sugar, pulses, fruits and vegetables, and other alternatives.
- Note: Fish and Seafood consumption takes into account: Freshwater Fish, Demersal Fish, Pelagic Fish, Marine Fish (Other), Crustaceans, Cephalopods, Molluscs (Other), and Aquatic Animals (Others).

Source: FAOStat, 2022

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

Fresh or Chilled Atlantic Salmon in the United Kingdom

UK - Trade Data - HS Code 030214 Fresh or chilled Atlantic salmon (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	683,869	78,400	-17	12	11
1	Norway	484,108	60,722	14	234	223
2	Faroe Islands	175,076	14,508	17	-4	-10
3	Iceland	18,297	2,171	-28	7	4
4	Sweden	2,592	300	-99	-60	-61
5	Ireland	2,014	521	10	-19	12
6	United Kingdom	1,024	100	-	-	-
7	Denmark	758	78	-87	-54	-57
8	France	-	-	-	-	-
9	United States of America	-	-	-	-	-
10	China	-	-	-	-	-

AUS - Trade Data - HS Code 030214 Fresh or chilled Atlantic salmon (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	285,470	22,288	1	43	31
1	China	167,539	12,334	15	38	22
2	Indonesia	37,157	2,789	27	56	44
3	Japan	23,309	1,680	-3	39	32
4	Vietnam	15,873	1,605	-15	48	45
5	Taiwan	12,670	1,093	45	22	15
6	United States	10,115	1,011	-16	312	290
7	Thailand	7,764	796	-68	126	134
8	South Korea	5,940	461	-6	140	107
9	Singapore	2,334	270	-75	26	15
10	Bruneu	40	82	45	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Atlantic Salmon in the United Kingdom

UK - Trade Data - HS Code 030313 Frozen Atlantic Salmon (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	1,557	302	-3	-1	-1
1	Chile	514	72	-	-	-
2	Netherlands	374	75	-	-	-
3	Faroe Islands	272	34	321	-	-
4	Ireland	188	44	790	-	-
5	United Kingdom	94	47	-	-	-
6	Denmark	53	5	-84	-24	-13
7	Norway	34	2	-97	-20	-31
8	Iceland	28	23	-74	25	1
9	United States of America	-	-	-	-	-
10	Ukraine	-	-	-	-	-

AUS - Trade Data - HS Code 030313 Frozen Atlantic Salmon (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	1,594	247	-61	39	-9
1	Vietnam	527	109	-5	117	32
2	Indonesia	516	56	-37	-	-
3	Hong Kong	215	15	62	19	28
4	New Zealand	128	9	-	-24	32
5	The Philippines	86	2	-62	130	-36
6	Papua New Guinea	60	10	-27	1	-37
7	Bangladesh	30	30	-36	-	-
8	Japan	19	2	-	-	-
9	Italy	5	1	26	-	-
10	Vanuatu	4	3	11	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Salmonidae in the United Kingdom

UK - Trade Data - HS Code 030319 Frozen Salmonidae (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	39	8	52	-65	-57
1	Ireland	25	4	58	-24	-16
2	Bulgaria	8	3	-	-	-
3	Pakistan	3	1	-53	-	-
4	Romania	2	-	-35	22	-
5	Portugal	1	-	-	-	-
6	Philippines	-	-	-	-	-
7	United Arab Emirates	-	-	-	-	-
8	Thailand	-	-	-	-	-
9	Vietnam	-	-	-	-	-
10	Poland	-	-	-	-	-

AUS - Trade Data - HS Code 030319 Frozen Salmonidae (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	1,209	47	19	35	20
1	Hong Kong	581	4	605	9	-34
2	Malaysia	481	34	-11	857	-
3	Thaialnd	92	5	-	-	-
4	Papua New Guinea	29	1	-90	31	30
5	Vietnam	10	1	-81	0	-33
6	Singapore	10	0	-	-	-
7	Solomon Islands	3	0	-	-	-
8	Japan	3	0	-	-	-
9	Saudi Arabia	-	-	-	-	-
10	Egypt	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Fillets of Pacific Salmon in the United Kingdom

UK - Trade Data - HS Code 030481 Frozen Fillets of Pacific Salmon (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	75,045	7,294	60	-4	-9
1	Norway	25,642	2,542	354	134	118
2	China	18,274	2,598	31	-15	-15
3	United States of America	13,340	662	0	-6	-22
4	Chile	4,946	437	101	-12	-14
5	Poland	4,118	288	93	-14	-19
6	Faroe Islands	3,406	320	-2	15	15
7	Ireland	1,579	101	3187	317	180
8	Sweden	969	119	-16	-36	-34
9	United Kingdom	948	57	-	-	-
10	Iceland	708	62	235	131	149

AUS - Trade Data - HS Code 030481 Frozen Fillets of Pacific Salmon (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	674	69	112	20	-5
1	Indonesia	294	31	87	-	-
2	Vietnam	144	23	633	-29	-20
3	New Zealand	95	2	-	-	-
4	Papua New Guinea	54	3	42	-	-
5	Hong Kong	49	2	-29	38	28
6	Maldives	16	1	265	-	-
7	Solomon Islands	9	6	-	-	-
8	The Philippines	8	0	208	-	-
9	Nauru	5	0	-	-	-
10	Cocos Islands	1	0	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Pacific Salmon in the United Kingdom

UK - Trade Data - HS Code 030312 Frozen Pacific Salmon (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	3,070	641	-25	12	27
1	Russian Federation	2,171	506	-19	-	
2	United States of America	642	90	-	-62	-26
3	Netherlands	197	42	-85	-	-
4	Canada	53	2	100	103	-
5	China	7	1	-	-	-
6	France	-	-	-	-	-
7	Ukraine	-	-	-	-	-
8	Spain	-	-	-	-	-
9	Maldives	-	-	-	-	-
10	Iceland	-	-	-	-	-

AUS - Trade Data - HS Code 030312 Frozen Pacific Salmon (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	31	3	-88	46	68
1	Singapore	12	1	-	-	-
2	Papua New Guinea	11	1	-77	3	20
3	The Philippines	5	1	-	-	-
4	New Zealand	2	0	-	-	-
5	Japan	-	-	-	-	-
6	China	-	-	-	-	-
7	Thailand	-	-	-	-	-
8	South Korea	-	-	-	-	-
9	Vietnam	-	-	-	-	-
10	Taiwan	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Smoked Pacific Salmon in the United Kingdom

UK - Trade Data - HS Code 030541 Smoked Pacific Salmon (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	42,563	1,734	9	-11	-17
1	Norway	19,205	792	8,920	733	430
2	Poland	10,863	487	-23	-4	2
3	Canada	5,285	129	26	31	28
4	Lithuania	2,632	138	286	-33	-34
5	Netherlands	1,866	82	37	9	7
6	Germany	1,100	58	7	-58	-58
7	Switzerland	697	6	66	-12	-21
8	United Kingdom	368	17	-	-	-
9	France	291	12	40	94	24
10	Ireland	129	7	-3	-25	-4

AUS - Trade Data - HS Code 030541 Smoked Pacific Salmon (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	21	1	-88	-61	-62
1	Papua New Guinea	10	1	122	4	0
2	Maldives	7	0	-	-	-
3	Hong Kong	3	0	-98	-68	-
4	United Kingdom	-	-	-	-	-
5	Germany	-	-	-	-	-
6	New Zealand	-	-	-	-	-
7	Poland	-	-	-	-	-
8	Norway	-	-	-	-	-
9	Denmark	-	-	-	-	-
10	Italy	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Salmonidae in the United Kingdom

UK - Trade Data - HS Code 030219 Fresh or Chilled Salmonidae (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	228	30	77	31	33
1	Poland	144	16	-	4	-5
2	Vietnam	83	14	-	-	-
3	Ireland	1	0	-	-	-
4	French Southern and Antarctic Territories	-	-	-	-	-
5	Germany	-	-	-	-	-
6	Netherlands	-	-	-	-	-
7	Chile	-	-	-	-	-
8	Morocco	-	-	-	-	-
9	Spain	-	-	-	-	-
10	United Arab Emirates	-	-	-	-	-

AUS - Trade Data - HS Code 030219 Fresh or Chilled Salmonidae (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	180	31	8	4	15
1	Hong Kong, China	132	9	22	20	11
2	Fiji	23	22	1236	-	-
3	Papua New Guinea	16	0	-	10	-
4	Singapore	10	0	-81	-	-
5	Portugal	-	-	-	-	-
6	Spain	-	-	-	-	-
7	United States of America	-	-	-	-	-
8	Italy	-	-	-	-	-
9	Poland	-	-	-	-	-
10	Greece	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Fillets of Pacific Salmon in the United Kingdom

UK - Trade Data - HS Code 030441 Fresh or Chilled Fillets of Pacific Salmon (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	62,795	4,399	42	4	-2
1	Norway	42,055	2,897	45	117	131
2	Faroe Islands	15,867	1,174	85	7	3
3	Ireland	3,212	204	18	-29	-29
4	United Kingdom	1,410	90	-	-	-
5	Netherlands	97	9	-94	22	-42
6	Germany	75	5	-65	-66	-64
7	Iceland	28	5	-99	-49	-46
8	Lithuania	26	2	-	-	-
9	France	23	11	-	88	-
10	Poland	2	1	-99	-84	-73

AUS - Trade Data - HS Code 030441 Fresh or Chilled Fillets of Pacific Salmon (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	16	1	-78	-25	-18
1	Nauru	6	0	57	-	-
2	Hong Kong	4	0	-75	7	-
3	Solomon Islands	3	0	-39	7	-
4	Maldives	1	0	-	-	-
5	Canada	-	-	-	-	-
6	Norway	-	-	-	-	-
7	New Zealand	-	-	-	-	-
8	United States	-	-	-	-	-
9	Sweden	-	-	-	-	-
10	Germany	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Pacific Salmon in the United Kingdom

UK - Trade Data - HS Code 030213 Fresh or Chilled Pacific Salmon (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	China	-	-	-	-	-
2	Bahrain	-	-	-	-	-
3	Singapore	-	-	-	-	-
4	New Zealand	-	-	-	-	-
5	Canada	-	-	-	-	-
6	United States of America	-	-	-	-	-
7	Chile	-	-	-	-	-
8	Belgium	-	-	-	-	-
9	France	-	-	-	-	-
10	Hong Kong, China	-	-	-	-	-

AUS - Trade Data - HS Code 030213 Fresh or Chilled Pacific Salmon (Export):

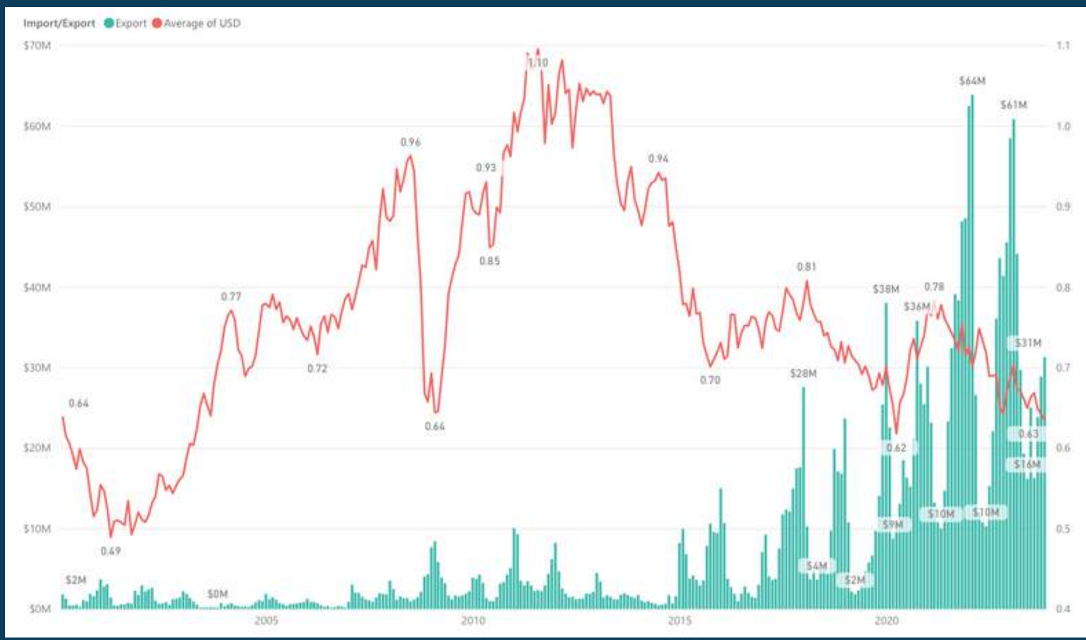
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-	World	1	0	-93	-76	-
1	Christmas Island	1	0	-	-	-
2	New Zealand	-	-	-	-	-
3	United States	-	-	-	-	-
4	Canada	-	-	-	-	-
5	Belgium	-	-	-	-	-
6	Italy	-	-	-	-	-
7	Poland	-	-	-	-	-
8	Brazil	-	-	-	-	-
9	China	-	-	-	-	-
10	Qatar	-	-	-	-	-

Source: ITC Trade Map, 2023

FRDC - Trade Data

Salmon Exports - Value

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



Value of Exports - Salmon

Commodity Description	Value
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$1,639,265,208
Fresh or chilled Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodrus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$216,488,447
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$169,818,644
Prepared or preserved salmon, whole or in pieces, but not minced (excl. salmon of Chapter 03)	$20,444,481
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$13,448,352
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$11,946,061
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (incl. fillets), whether or not cooked before or during the smoking process	$9,202,743
Fresh or chilled Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodrus) (excl. fillets and meat of HS 0304 & livers & roes)	$7,142,450
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and livers and roes)	$7,105,586
Smoked Pacific salmon, Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho), whether or not cooked before or during the smoking process (incl. fillets) (excl. livers, roes, edible offal and HS 030510)	$7,036,184
Frozen salmonidae (excl. Sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$6,899,141
Fresh or chilled Pacific salmon (Oncorhynchus nerka, O. gorbuscha, O. keta, O. tschawytscha, O. kisutch, O. masou & O. rhodrus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$6,891,106
Frozen fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho Hucho)	$4,370,812
Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou andOncorhynchus rhodorus), excluding livers and roes	$3,866,377
Frozen salmonidae (excl. sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and livers and roes)	$2,106,663
Frozen salmonidae (excl. Pacific, Atlantic, Danube and sockeye salmon; trout; fillets and other meat of HS 0304 and livers and roes)	$1,758,951
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$1,368,730
Fresh or chilled fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Daunube salmon (Hucho hucho)	$1,359,033
Frozen Pacific salmon (Oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus) (excl. sockeye salmon (red salmon); fillets and other meat of HS 0304 and livers and roes)	$1,096,389
Frozen Pacific salmon (Oncorhynchus gorbuscha, O. keta, O. tschawytscha, O. kisutch, O. masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$547,958
Frozen Pacific salmon (Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and livers & roes)	$108,725
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$45,051
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and livers and roes)	$26,109
Fresh or chilled salmonidae meat, whether or not minced (excl. fillets)	$20,250

Value of Exports - Top Commodity Breakdown

Country	Value
China	$1,036,211,431
Japan	$284,363,789
Indonesia	$204,197,263
Taiwan	$126,096,434
Vietnam	$119,366,555
Thailand	$77,807,229
United States of America	$73,989,668
Singapore	$64,129,172
Hong Kong	$36,854,619
New Zealand	$33,700,626
Korea Republic of	$21,837,243
Malaysia	$21,107,414
Brunei Darussalam	$5,070,100
United Arab Emirates	$4,600,497
Papua New Guinea	$3,224,881

Leading Export Destinations - Value

State	Value
TAS	$1,584,502,806
VIC	$435,986,094
NSW	$68,389,893
SA	$18,049,606
Foreign (re-export)	$16,828,669
WA	$4,351,785
QLD	$4,231,439
NT	$17,716
ACT	$5,443

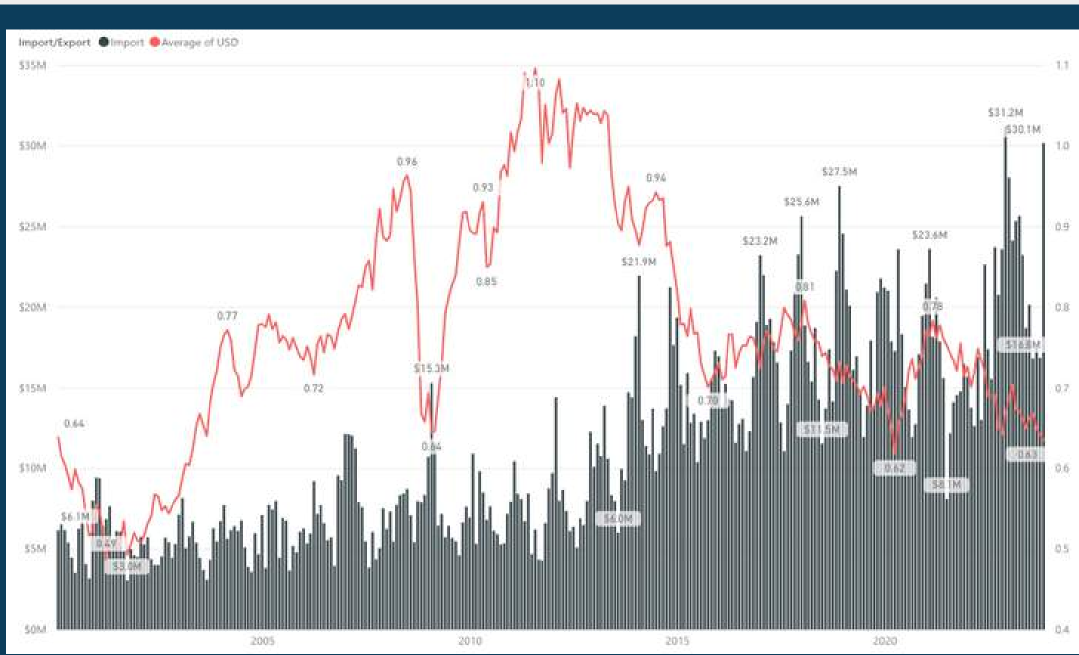
Export Value by State

Source: FRDC, 2023

FRDC - Trade Data

Salmon Imports - Value

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



Value of Imports - Salmon

Commodity Description	Value
Prepared or preserved salmon, whole or in pieces, but not minced (excl. salmon of Chapter 03)	$1,351,807,951
Smoked Pacific salmon, Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho), whether or not cooked before or during the smoking process (incl. fillets) (excl. livers, roes, edible offal and HS 030510)	$772,936,264
Frozen fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho Hucho)	$585,983,924
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus); Atlantic salmon (salmo salar) & Danube salmon (Hucho hucho) (incl. fillet) whether or not cooked before or during smoking, in packs <= 1kg	$214,356,907
Fresh or chilled Pacific salmon (Oncorhynchus nerka, O. gorbuscha, O. keta, O. t	$57,962,760
Fresh or chilled Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodrus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$56,714,624
Fresh or chilled fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Daunube salmon (Hucho hucho)	$36,684,083
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$35,653,728
Fresh or chilled Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodrus) (excl. fillets and meat of HS 0304 & livers & roes)	$25,474,396
Prepared or preserved salmon (incl. minced salmon) (excl. whole fish or fish in pieces and salmon of Chapter 03)	$24,016,724
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus), Atlantic salmon (salmo salar) & Danube salmon (Hucho hucho) (incl. fillets) whether or not cooked before or during smoking, in packs > 1kg	$16,319,516
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excluding fillets and o	$3,911,039
Frozen Pacific salmon (Oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus) (excl. sockeye salmon (red salmon); fillets and other meat of HS 0304 and livers and roes)	$3,688,256
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	$2,141,522
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excluding	$1,762,187
Frozen salmonidae (excl. sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and livers and roes)	$967,400
Frozen salmonidae (excl. Pacific, Atlantic, Danube and sockeye salmon: trout; fillets and other meat of HS 0304 and livers and roes)	$963,676
Fresh or chilled salmonidae meat, whether or not minced (excl. fillets)	$832,182
Frozen Pacific salmon (Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and livers & roes)	$641,201
Pacific salmon, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	$317,578
Frozen salmonidae (excluding Sockeye salmon (red salmon); Pacific salmon; Atlant	$316,711
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (	$278,816
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and livers and roes)	$240,370
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and livers and roes)	$142,460

Value of Imports - Top Commodity Breakdown

Country	Value
Denmark	$760,932,018
Norway	$716,934,430
United States of America	$709,640,004
Thailand	$315,231,652
New Zealand	$205,269,755
Canada	$203,117,995
Poland	$168,441,779
China	$22,602,158
Germany	$20,671,459
Chile	$19,976,550
United Kingdom	$13,961,012
Korea, Republic of	$11,893,071
Sweden	$11,648,219
Netherlands	$4,467,489
Spain	$2,573,867

Leading Import Sources - Value

State	Value
NSW	$1,667,236,982
VIC	$1,024,730,989
QLD	$370,099,957
WA	$98,879,823
SA	$32,881,147
NT	$369,832
TAS	$85,618

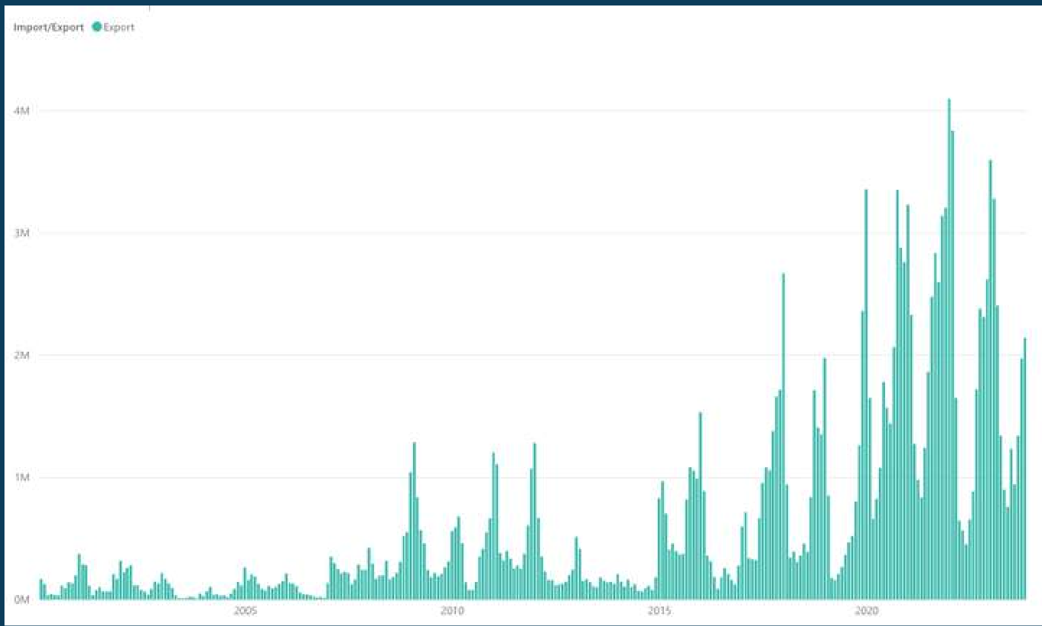
Import Value by State

Source: FRDC, 2023

FRDC - Trade Data

Salmon Exports - Volume

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



Volume of Exports - Salmon

Commodity Description	Quantity
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	117,152,229
Fresh or chilled Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodrus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	28,188,909
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	16,522,408
Prepared or preserved salmon, whole or in pieces, but not minced (excl. salmon of Chapter 03)	3,497,767
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	2,469,055
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	2,060,514
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and livers and roes)	842,817
Fresh or chilled Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodrus) (excl. fillets and meat of HS 0304 & livers & roes)	819,482
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (incl. fillets), whether or not cooked before or during the smoking process	488,608
Fresh or chilled Pacific salmon (Oncorhynchus nerka, O. gorbuscha, O. keta, O. tschawytscha, O. kisutch, O. masou & O. rhodrus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	468,406
Frozen fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho Hucho)	419,343
Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou andOncorhynchus rhodorus), excluding livers and roes	385,534
Frozen salmonidae (excl. Sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and edible fish offal of HS 03039)	371,708
Frozen salmonidae (excl. Pacific, Atlantic, Danube and sockeye salmon: trout; fillets and other meat of HS 0304 and livers and roes)	340,554
Frozen salmonidae (excl. sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and livers and roes)	304,579
Frozen Pacific salmon (Oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus) (excl. sockeye salmon (red salmon); fillets and other meat of HS 0304 and livers and roes)	286,395
Smoked Pacific salmon, Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho); whether or not cooked before or during the smoking process (incl. fillets) (excl. livers, roes, edible offal and HS 030510)	267,822
Fresh or chilled fillets of Pacific salmon (Oncorhynchus nerka; gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Daunube salmon (Hucho hucho)	134,852
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and edible fish offal of HS 03029)	83,089
Frozen Pacific salmon (Oncorhynchus gorbuscha, O. keta, O. tschawytscha, O. kisutch, O. masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and edible fish offal of HS 03039)	47,781
Frozen Pacific salmon (Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and livers & roes)	8,188
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	3,401
Fresh or chilled salmonidae meat, whether or not minced (excl. fillets)	3,361
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and livers and roes)	290

Volume of Exports - Top Commodity Breakdown

Country	Quantity
China	74,753,863
Japan	25,160,162
Indonesia	15,946,026
Taiwan	11,682,342
Vietnam	11,093,684
Thailand	8,516,166
Singapore	6,756,309
United States of America	6,308,122
New Zealand	4,341,299
Hong Kong	3,772,796
Malaysia	2,058,352
Korea Republic of	1,466,865
United Arab Emirates	551,195
Papua New Guinea	456,649
Brunei Darussalam	344,253

Leading Export Destinations - Volume

State	Quantity
TAS	131,205,860
VIC	34,594,194
NSW	4,678,578
Foreign (re-export)	2,101,943
SA	1,337,829
QLD	634,449
WA	611,785
NT	2,353
ACT	101

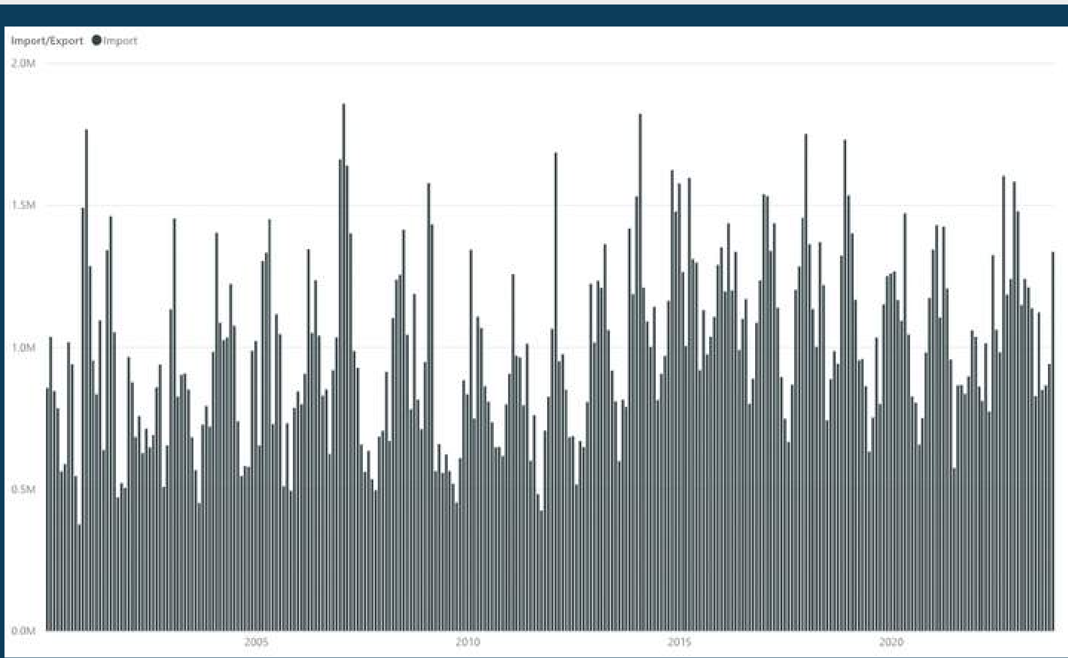
Export Volume by State

Source: FRDC, 2023

FRDC - Trade Data

Salmon Imports - Volume

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



Volume of Imports - Salmon

Commodity Description	Quantity
Prepared or preserved salmon, whole or in pieces, but not minced (excl. salmon of Chapter 03)	180,363,455
Frozen fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho Hucho)	33,637,467
Smoked Pacific salmon, Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho); whether or not cooked before or during the smoking process (incl. fillets) (excl. livers, roes, edible offal and HS 030510)	32,629,697
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus), Atlantic salmon (salmo salar) & Danube salmon (Hucho hucho) (incl. fillet) whether or not cooked before or during smoking, in packs <= 1kg	11,755,537
Fresh or chilled Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodrus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	6,835,433
Prepared or preserved salmon (incl. minced salmon) (excl. whole fish or fish in pieces and salmon of Chapter 03)	4,619,329
Fresh or chilled Pacific salmon (Oncorhynchus nerka, O. gorbuscha, O. keta, O. t	3,817,664
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	2,909,957
Fresh or chilled Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodurus) (excl. fillets and meat of HS 0304 & livers & roes)	2,456,852
Fresh or chilled fillets of Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), Atlantic salmon (Salmo salar) and Daunube salmon (Hucho hucho)	2,093,760
Frozen Pacific salmon (Oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus) (excl. sockeye salmon (red salmon); fillets and other meat of HS 0304 and livers and roes)	1,237,156
Smoked Pacific salmon (Oncorhynchus nerka, gorbuscha, keta, tschawytscha, kisutch, masou & rhodurus), Atlantic salmon (salmo salar) & Danube salmon (Hucho hucho) (incl. fillets) whether or not cooked before or during smoking, in packs > 1kg	1,029,109
Frozen salmonidae (excl. Pacific, Atlantic, Danube and sockeye salmon; trout; fillets and other meat of HS 0304 and livers and roes)	234,629
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excl. fillets and other meat of HS 0304 and livers and roes)	226,998
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excluding fillets and o	224,990
Frozen Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (excluding	96,409
Frozen salmonidae (excl. sockeye salmon (red salmon); Pacific salmon; Atlantic salmon; Danube salmon; trout; fillets and other meat of HS 0304 and livers and roes)	84,843
Frozen Pacific salmon (Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou & Oncorhynchus rhodurus) (excl. sockeye salmon (red); fillets and other meat of HS 0304 and livers & roes)	84,418
Pacific salmon, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	82,595
Fresh or chilled salmonidae meat, whether or not minced (excl. fillets)	77,424
Fresh or chilled salmonidae (excl. trout; Pacific salmon; Atlantic salmon; Danube salmon; fillets and other meat of HS 0304 and livers and roes)	50,762
Frozen salmonidae (excluding Sockeye salmon (red salmon); Pacific salmon; Atlant	35,640
Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho) (	24,068
Frozen sockeye salmon (red salmon) (Oncorhynchus nerka) (excl. fillets and other meat of HS 0304 and livers and roes)	11,748

Volume of Imports - Top Commodity Breakdown

Country	Quantity
United States of America	102,975,924
Norway	40,559,522
Thailand	38,211,731
Denmark	35,078,466
Canada	27,941,393
New Zealand	16,578,766
Poland	10,893,865
China	3,944,868
Korea, Republic of	2,512,200
Chile	2,188,300
Germany	1,267,780
United Kingdom	809,483
Sweden	506,343
Netherlands	261,377
France	233,686

Leading Import Sources - Volume

State	Quantity
NSW	131,123,981
VIC	109,876,251
QLD	30,463,678
WA	8,415,615
SA	4,725,078
NT	22,751
TAS	3,941

Import Volume by State

Source: FRDC, 2023

FRDC - Trade Data Sourced from FAO

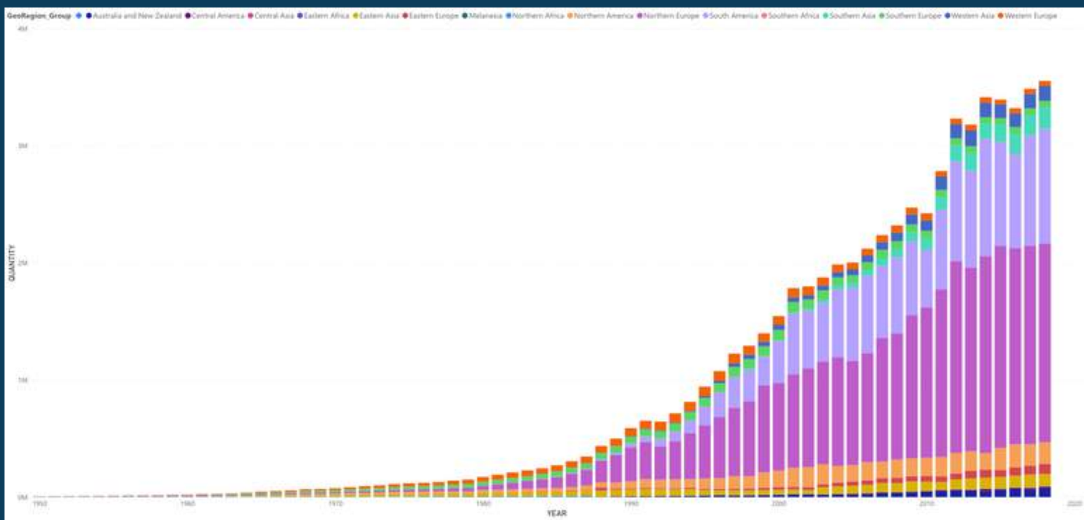
Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Salmon, Trouts, Smelts

ISSCAAP Group: Salmon, Trouts, Smelts

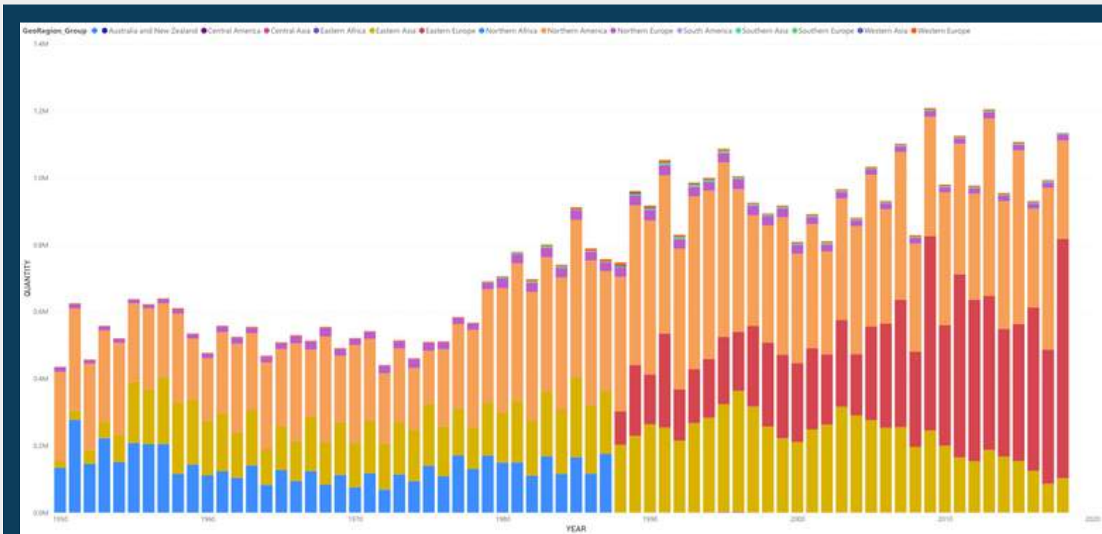
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	40 255	36 775	24 283
United Kingdom	Tonnes – net product weight	239 121	198 927	238 783

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	433 651	332 336	251 977
United Kingdom	Value (USD 1000)	2 029 853	1 594 771	2 023 587

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

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