



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

January 2024



Seafood Industry
Australia
The Voice of Australian Seafood



GREAT
AUSTRALIAN
SEAFOOD



About Seafood Industry Australia

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

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

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

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

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

Agricultural Trade and Market Access Cooperation (ATMAC) Program

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

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



Economic Indicators

- GDP (USD): **\$27.36 trillion** as of January 2024.
- GDP per capita (USD): **\$67,494** as of December 2023.
- Currency: **United States Dollar** (USD).
- Exchange Rate: **1 USD = 1.54 AUD** (05/02/24).
- Mercer's 2023 Quality of Living Ranking: The USA's highest-ranking city is **San Francisco at 37**, followed by **New York at 40** and **Boston at 41**.
- Human Development Index: **0.921** and ranked **21st** as of 2021.
- Logistics Performance Index: **3.80** and ranked **17th** globally as of 2023.

Source: Trading Economics, World Bank, Mercer

- **Trade Agreements:**
 - Under the Trump Administration, the USA moved away from previous free trade-supporting principles and left the TPP, among other deals. However, with the recent arrival of the Biden Administration, this trend is expected to reverse as the USA aims to best fulfill its obligations under 40 existing Bilateral Investment agreements.
 - The Australia-United States Free Trade Agreement (AUSFTA) came into effect on 1 January 2005.
 - The "Quad" alliance of Australia, the USA, India, and Japan is expected to morph into a trade bloc in the coming years.

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



Demographic Indicators

- Total Population: Approximately **335.89 million** as of January 2024.
- Expatriate Population: Approximately **45.30 million** as of 2021 as per the United States Census.
- Population Growth: **0.54%** as of 2023.
- Median Age: Approximately **38.50** years old.
- Urban Population: **83.0%** as of 2023.
- **Population Ethnicity:**
 - Non-Hispanic white 60.1%
 - Hispanic and Latino 18.5%
 - Black 13.4%
 - Asian 5.9%
 - Indigenous (mainland) 1.3%
 - Indigenous (Hawaii) and other Pacific Islanders 0.2%
- **Dominant Religious Groups:**
 - 42% Protestantism
 - 21% Catholicism
 - 2% Mormonism
 - 1% Judaism
 - 1% Islam
 - 1% Hinduism
 - 1% Buddhism
 - 2% Other (Taoism, Sikhism, folk religions)

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



Consumer Behaviour & Societal Trends

Key Trends:

- USA households are keen consumers, adequately positioned for such behaviour as they mostly fall into a middle-class segment with relatively high purchasing power. The upper class also exercises a large share of consumer purchases, with the OECD forecasting that in the decade until 2030, it is this group that will be the world's largest market segment in terms of absolute purchase value.
- The USA consumer base dedicated a higher share of weekly purchases to lower-priced products as the COVID-19 pandemic created a recession that predominantly impacted the lower and middle classes. A recent Deloitte report found that along with looking for cheaper products, those that are widely available and can be purchased in a convenient manner are of prime value to the American consumer.
- The population is very engaged in terms of utilising e-commerce platforms, with 96% of the population shopping online. This has led omnichannel retailers to continue to increase the quality and presence of their online platforms.
- American consumers are very particular about what they buy, as they are reported to be more likely to compare prices for different products, read online reviews and look for relevant promotions before making a purchase.
- While the COVID-19 pandemic has reduced the movement of consumers outside their homes, the consumer base in the USA is still very willing to travel to major supermarkets such as Walmart and Sam's Club to make a purchase. Therefore, most consumers shop with a range of channels both online and offline.
- A McKinsey report from August 2020 found that three-quarters of consumers in the USA have tried purchasing using new behaviours in response to the general uncertainty and economic pressure created by the COVID-19 pandemic. Furthermore, 36% reported that they had tried purchasing a new brand, and nearly three-quarters of that group were willing to continue using that new brand.

- Four-fifths of consumers will use credit or debit cards to make purchases however, privacy concerns regarding the submitting of personal data online remains a major concern in the USA.
- “Made in America” is a major selling point for products both online and offline, with consumers much keener than their overseas counterparts to consider whether the brand is American and/or the product was produced in the USA.
- The second-hand economy is growing rapidly, especially amongst younger generations of American consumers who are keen to change their purchasing habits to mitigate the effects of climate change.

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

Digital Adoption:

- Americans spend nearly 7 hours a day on the internet, approximately 2 hours of which is dedicated to social media usage.
- There are an estimated 230 million active social media users in the USA.
- More than a third of Generation Z makes daily purchases through social media.
- Approximately one-third of Americans do not trust their personal data in the hands of major tech companies.

Source: Digital in 2020 Report





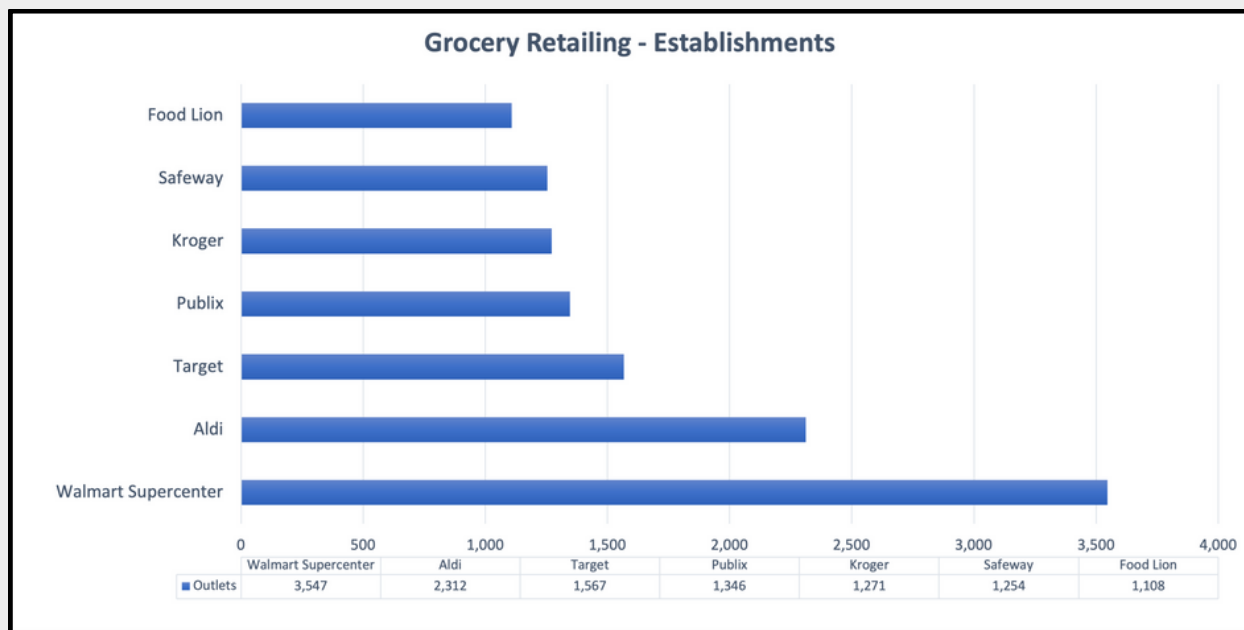
Grocery Retail Channel Developments

Key Trends:

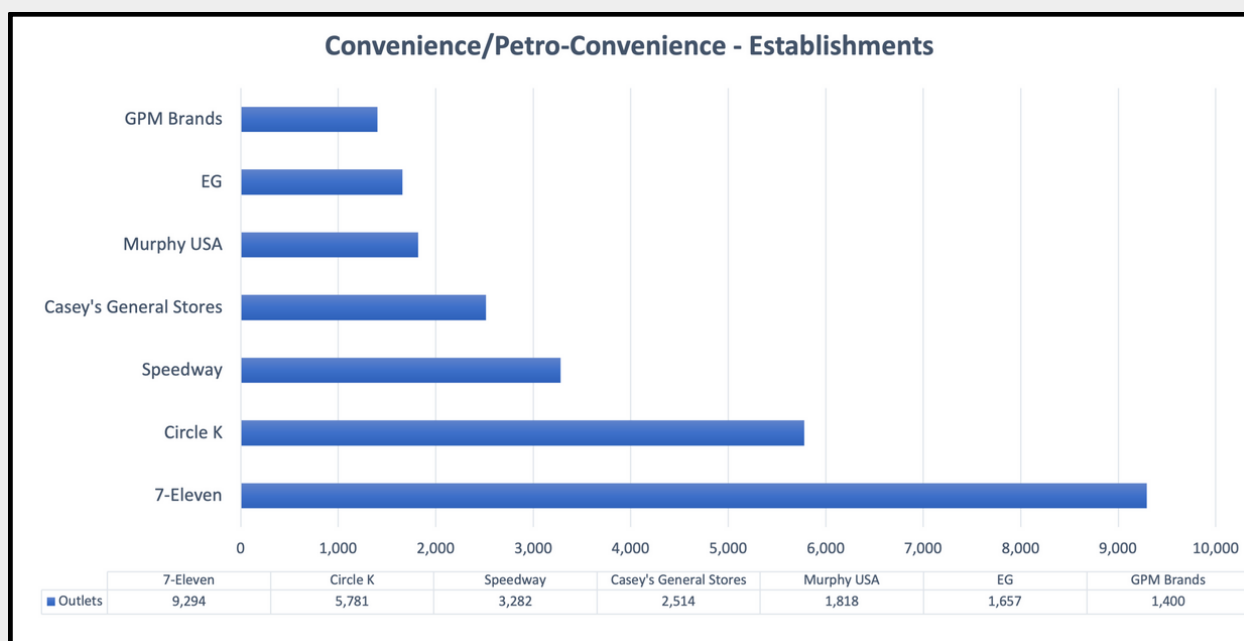
- Traditional grocery retailers suffered the most of all businesses in the grocery retail channel due to reduced capacity to implement social distancing and necessary sanitary measures in-store, along with the fact that many were classed to be non-essential businesses and therefore involuntarily closed at the height of the pandemic.
- Convenience stores and forecourt retailers also experienced negative growth in sales in 2020, albeit lower than traditional grocery retailers because they were able to remain classified as essential services. Prior to the pandemic, these two business channels experienced rapid growth in sales as a result of successful measures to primarily target on-the-go travelers.
- Alcohol sales across all segments of the grocery retail channel continued to increase throughout the pandemic, especially with regards to convenience stores and forecourt retailers.
- To support the rising usage of contactless payment methods that was accelerated by the COVID-19 pandemic, leading convenience store chain 7-Eleven recently announced the creation of a mobile wallet that can be added to the 7-Eleven app for making in-store purchases.
- Retailers across the grocery retail channel, such as Circle K (convenience stores) and Amazon Go (supermarkets) are increasingly engaging with AI technology to create cashier-less checkout options to improve the health outcomes of customers and overall shopping convenience.
- A big development in the hypermarket channel was Walmart's launching of its new membership program "Walmart+" to rival Amazon Prime. The system allows for members to obtain unlimited deliveries, Scan & Go technology, and fuel discounts, among other benefits.

- Sales of products in supermarkets rose greatly throughout 2020 after a year of average growth in 2019. This phenomenon was the result of American consumers increasing the proportion of their spending that went towards essential goods in response to greater financial pressure and uncertainty.
- The value of online grocery purchases skyrocketed throughout 2020 as consumers took advantage of curbside pickups and home deliveries to support their social distancing preferences.

Grocery Retailing Brand Outlets:



Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor, Phoenix Business Journal, NFCW



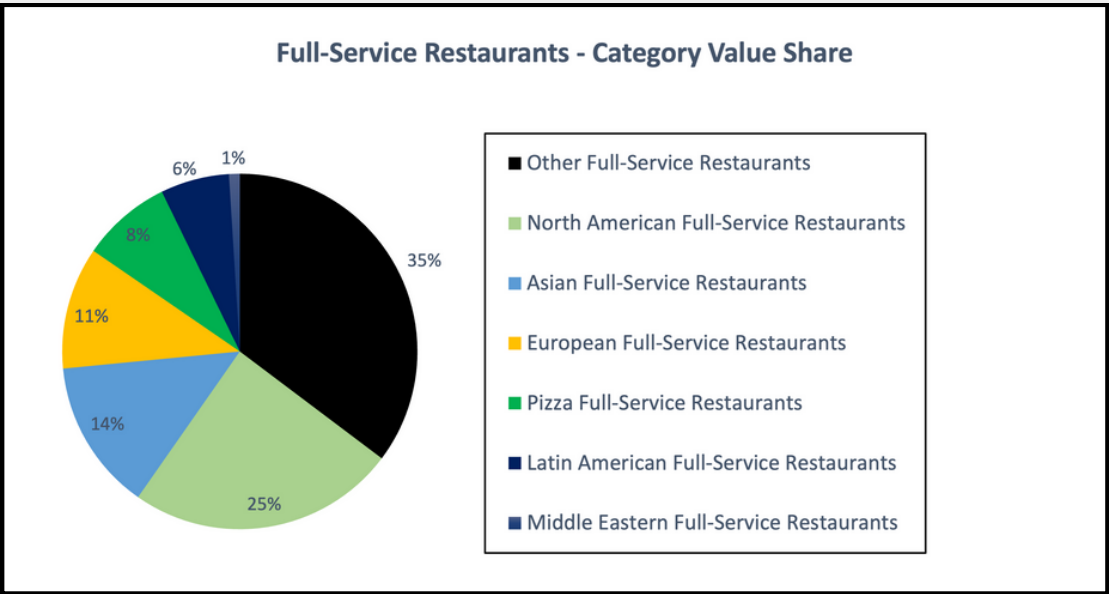
Foodservice Channel Developments

Key Trends:

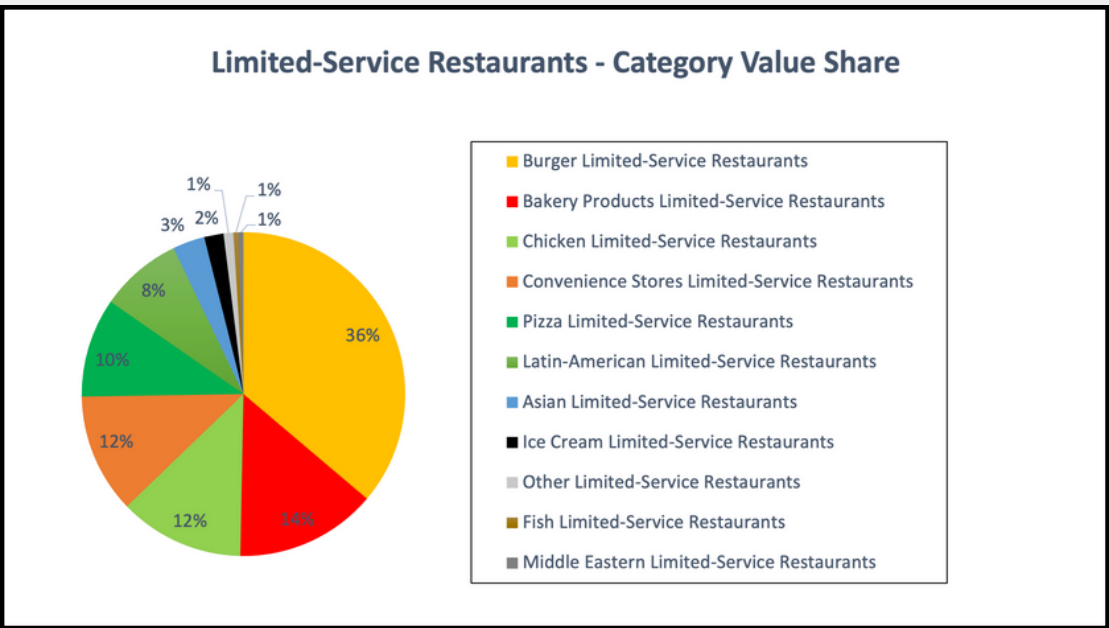
- Full-service restaurants in the USA, mostly independent, have seen frequent negative sales growth following the start of the COVID-19 pandemic as consumers have turned away from dine-in eating experiences. Foodservice businesses saw the most job losses of any industry in the USA in 2020. Restaurants offering delivery, especially those businesses that partner with food delivery apps, have been spared the worst of the industry contraction as consumers can obtain their food and beverage orders whilst minimising interpersonal contact.
- With the sharp increases in-home delivery orders from full-service restaurants, many businesses have chosen to offer alternative dining options for customers in the form of, for example, ready-to-bake meals and DIY cocktails. This experimental dining trend is most popular amongst younger generations and is forecast to further increase in the long term.
- The relative size of menus pre and post-pandemic have generally decreased, in spite of the many innovative menu items recently introduced. This is due to restaurants greatly reducing menu items to improve efficiency and cover their bottom-line in the midst of declining sales. A 2021 State of the Restaurant industry report found that 63% of American restaurants offered less menu items than pre-pandemic. This trend was most profound in fine and casual dining restaurants, whereas in quick-service and family dining restaurants this trend was not as prominent.
- Many limited-service restaurants are using the pandemic's harming of consumer demand to shift the business focus towards online services. Shake Shack has stated its business was 20% online pre-pandemic and, as of March 2021, is 80% online.
- Loyalty programs, mostly among limited-service chains, have seen an explosion in popularity in direct correlation to the number of orders completed via the internet, as customers can much more easily access and implement their reward benefits when making online purchases.

- Eco-friendly menu items have continued to feature heavily in American consumers’ desires when ordering from limited and full-service restaurants, with vegan and vegetarian diets exploding in popularity and a greater demand amongst Americans for ethically-sourced produce. This has led many major fast-food chains to offer traditional customer favourites rebranded as new plant-based products, with “fake meat” from major producers such as Impossible and Beyond Burgers the key ingredient seen, for example, in Burger King’s new “Impossible Whopper”.
- Burgers were most selected by full-service restaurants as their highest-selling food category in early 2021, whilst limited-service restaurants believed sandwiches and wraps to be their most popular range of foods. The most popular order in the rapidly growing Asian food market was milk tea, with the beverage experiencing a relatively high percentage of orders late at night.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



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



Food & Drink e-Commerce Channel Developments

Key Trends:

- Due to the high rates of COVID-19 infections in the USA, coupled with the much lower risk of contracting COVID-19 when purchasing products through online channels, Food & Drink e-commerce has seen an explosion in sales growth since early 2020. At the peak of the COVID-19 crisis in the USA, consumer spending on e-commerce had jumped 44.4% from the last quarter.
- Curbside pickup of online orders has proved a much cheaper option for businesses than offering delivery services, especially in rural and suburban areas where reliance on personal automobiles is higher. At the end of 2019, only 6.9% of major e-tailers used this process, a figure which had increased to 43.7% by August 2020, of which many of these businesses, such as Walmart and Kroger, relied heavily on Food & Drink sales. Target, however, was much later to allow for perishable goods to be picked up in this manner and thus experienced its own sharp increase in sales much later.
- The pace of autonomous Food & Drink delivery innovation has increased due to the pandemic, as Amazon and Walmart have greatly enlarged their investment and progress in their respective drone delivery pilot programs. These measures are targeted to suit greater customer demands for convenience, especially amongst millennials and even younger generations.
- Food delivery apps have seen incredible levels of growth over the last decade in terms of sales, market size, to name a few measures. This trend has only been accelerated by the pandemic, with nearly a third of US consumers recently stating that they use third-party delivery apps to order from restaurants at least twice a week.
- Bundles of Food & Beverage products have increasingly featured on online menus, with a range of options such as mix-and-match, whereby customers can create their own package, or groups of items put together by the E-tailer to suit a certain activity, like Pantry Shop's workout bundles.

Key E-tailers:

- Costco, operating as a major hypermarket, saw large sales volume increases during the earlier stages of the pandemic frequented by “panic-buying” consumer activities.
- According to Insider Intelligence, e-tailers Amazon and Instacart have benefitted the most from the shift towards click-and-collect purchases of food and beverage products.
- In the eco-friendly food segment, there are many divisions in which market leaders have experienced considerable growth in recent years, especially since the pandemic began. “Fake meat” producer Beyond Meat’s 2-day home delivery service has led the meat substitute e-commerce market. HelloFresh and Sun Basket still lead the meal kit market, the latter of which retains consistent growth figures through an online subscription portal.

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

Seafood Consumption in the USA

- Fish and seafood supply per person in the USA is valued at 22.36 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:

- US Department of Commerce: Enforces the conditions of the AUSFTA.
- Customs and Border Protection (CBP): Inspect food imports to check for violations of USDA FSIS (for meat and poultry products) or FDA (for all other products) regulations.

Product Registration/Import Procedure:

- Facilities that manufacture, pack, or process products to be sold in the US must register with the FDA. There are, however, some exemptions for entities including farms and fishing vessels, and therefore it is best to check the FDA's "Questions and Answers Regarding Food Facility Registration: Guidance for Industry" page for clarity. Registration must be renewed bi-annually.
- All food regulation requirements must be made by the exporting firm before the goods enter the United States. Extra attention must be paid to special regulations that apply to certain products such as alcoholic beverages and fresh food.
- If the firm exporting to the USA decides to use a licensed customs broker or another kind of licensed agent then the owner's declaration must be submitted by the exporter authorizing this process. This declaration, if made overseas, must be executed before a notary public (can be found at all American embassies and most consulates) and bear the notary stamp.
- Records must be maintained of all stages of production from the product being created to when it is sold on the shelves in the USA.

Documentation Required:

- Bill of Lading/Airway Bill.
- Invoice
- Packing list
- Other shipment papers (to be completed by the entity receiving the goods in the USA)
- An import license is generally not required, however, there are exemptions under both USDA FSIS and FDA regulations that can be viewed on the agencies' respective websites.
- Many of the required documents can be filed through the CBP Automated Broker Interface (ABI) online portal.

General Labelling Requirements:

- For meat and poultry products, the USDA FSIS procedure must be followed. Whereas for all other products, FDA procedures are to be followed. The main components of these procedures are summarised as follows:
- Nutrition information (metric system and equivalent % of daily value)
- Ingredient list
- Net quantity (imperial system with possibility for the metric system in brackets)
- Country of origin
- Food products do not need to be dated
- Product name and description in prominent letters
- Name and address of manufacturer, packager, or distributor
- Allergy labelling (if required)
- Information not required cannot be added to the information panel (where ingredients and nutrition are listed)
- Juices must have % juice listed
- Additives and colourings

Packaging Requirements:

- List net quantity on outside packaging along with numbers used to identify the product on the invoice.
- Wood packaging materials must be treated by fumigation and heat, before being marked with certification of this process.

Non-Tariff Barriers:

- Products are examined by the CBP upon arrival. If it is a business' first time importing, there is a higher chance of freight being flagged for a more in-depth inspection.
- Products intended for children face a range of extra regulations requiring compliance tests before being exported to the USA.
- Product liability insurance is sometimes required by the US vendor.
- Import quotas for dairy products

Tariffs Levied:

- Tariffs are classified as per the Harmonised Tariff System (HTS) and the online Tariff Database can be used to help calculate the specific duty payable on any one item.
- AUSFTA eliminated most tariffs but some still remain.
- Special tariff-rate quotas were also introduced as part of the AUSFTA, particularly with regards to the agriculture sector for beef, cheese, and avocado products.

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





Category Data

Fish and Seafood in the USA

Key Trends:

- Before the onset of the pandemic, consumers unwilling to cook at home were generally dependent on takeaway meals or other foodservice offerings. However, 2020 has seen widespread foodservice closures around the country, resulting in many consumers having no other option but to cook at home. As the trend of cooking at home has been on the rise, more consumers are widening their palates and cooking skills. While consumers would previously refrain from purchasing fish and seafood due to their lack of confidence in cooking such items, this has changed in 2020 with new faith in their developed skills.
- In 2021, retail sales of all seafood categories were good, but crustaceans like crab and lobster performed exceptionally well. Many customers were more comfortable preparing these items in 2020 than they had been previously. Consumers wanted to reproduce excellent meals at home because they could no longer eat them outside the home. Consumers had more spare cash to spend on more costly goods at the grocery store, such as lobster, while they spent less money on dining out and other activities outside the home.
- US consumers have been gravitating towards online grocery shopping since it offers more convenience and safety. Even though online grocery shopping has steadily been on the rise for the last few years prior to 2020, many Americans did not find it necessary to alter their traditional shopping habits of buying groceries in-store. However, after the onset of the pandemic, many consumers are realising the merits of online grocery shopping, especially as it is safer and restricts possible exposure to the virus.
- Earlier, for a highly perishable category like fish and seafood, many consumers were hesitant to buy these products online as they were not as trusting of a stranger picking out their food. However, this behaviour is slowly changing as more consumers are happy to try out newer services in order to stay safe.
- Eating habits have been affected by foodservice closures, leading to a short-term shift towards cooking at home. However, it is expected that once foodservice outlets go back to operating at full capacity, consumer eating habits will go back to being reliant on such outlets. Of course, this will largely depend on the state of the economy- if there is an increased possibility of an economic recession, consumers will try and save money by dining at home.

- The pandemic and the resulting substantial changes to daily lifestyles have led to a major emergence of the health-conscious consumer. For many, 2020 gave them the opportunity to examine and assess their daily habits and consumption patterns and make the necessary adjustments to their eating habits so that they may lead healthier lives. Fish and seafood in particular have been traditionally viewed as healthy sources of protein, making them a strong alternative to meat products. The latter category has recently gained negative press attention in the last few years due to varied health concerns relating to the consumption of red meat.
- Fresh finfish sales are predicted to account for the majority of fish and seafood sales in 2021/22, with salmon being the most popular species. Salmon is quite popular among customers as it is rich in flavour and is packed with nutritional value. Tilapia, pollock, cod, tuna, and catfish are some of the other popular finfish sold at fish markets.
- Fresh shellfish generates a significant portion of earnings at fish markets, even if finfish remains the most popular commodity. Fresh shellfish sales are estimated to account for over 30% of overall industry revenue in 2021. Shrimp is the most popular shellfish species. Shrimp can be prepared in a variety of ways and typically contains low levels of mercury, so health risks are minimal. Clams, oysters, crab, and lobster are among the most popular shellfish after shrimp.
- Small, independently-owned businesses or small chains with fewer than five locations make up the majority of the US Fish and Seafood Markets industry. The average number of employees per establishment in the industry is three, and the establishment to enterprise ratio is around one to one. This represents a highly fragmented sector with a large number of tiny businesses. Consumers can also purchase items from several operators through catalogues or online retail.
- Abalone consumption in the US is led by affluent Asian families and those seeking new experiences, with increased demand during special occasions such as Chinese/Lunar New Year as an ethnic delicacy. These consumers opt for retail channels such as independent ethnic markets and seafood markets to source high-quality abalone - with retail representing over 80% of total consumption - approximately 429 tonnes in 2020.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
United States of America	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	2,896.33	4.86
				2027	3,382.21	3.15
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	72.63	4.56
				2027	87.51	3.80
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	1,176.05	2.90
				2027	1,379.68	3.25
		Dried Fish & Seafood	Dried Fish & Seafood	2022	244.69	4.07
				2027	302.32	4.32
		Fresh Fish & Seafood (Counter)	Fish	2022	998.53	.70
				2027	1,188.99	3.55
			Shellfish	2022	3,424.45	-.33
				2027	3,849.36	2.37
		Frozen Fish & Seafood	Frozen Processed Fish	2022	929.26	4.03
				2027	1,116.34	3.74
			Frozen Whole Cuts Of Fish & Seafood	2022	2,094.19	3.25
				2027	2,498.06	3.59

Source: GlobalData, 2024

ITC - Trade Data

Live, Fresh or Chilled, Even in Shell, Ablone in the USA

USA - Trade Data - HS Code 030781 Live, fresh or chilled, (Import):
even in shell, abalone "Haliotis spp."

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	4,178	643	-3	43	100
1	South Korea	2,111	339	-10	25	79
2	Chile	1,330	222	35	-	269
3	Mexico	646	81	-32	74	88
4	Japan	68	0	1,248	108	-
5	Australia	15	0	-54	-28	-
6	South Africa	6	0	-	-	-
7	Canada	2	0	-	-	-
8	Nigeria	-	-	-	-	-
9	China	-	-	-	-	-
10	New Zealand	-	-	-	-	-

AUS - Trade Data - HS Code 030781 Live, fresh or chilled, (Export):
even in shell, abalone "Haliotis spp."

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

Source: ITC Trade Map, 2023



ITC - Trade Data

Smoked, Frozen, Dried, Salted or in Brine, Abalone

USA - Trade Data - HS Code 030789 Smoked, frozen, dried, [\(Import\):](#)
salted or in brine, abalone "Haliotis spp.", even in shell

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

AUS - Trade Data - HS Code 030789 Smoked, frozen, dried, [\(Export\):](#)
salted or in brine, abalone "Haliotis spp.", even in shell

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)
-	NO DATA AVAILABLE					
1						
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Source: ITC Trade Map, 2023

ITC - Trade Data

Smoked, Frozen, Dried, Salted or in Brine, Abalone

USA - Trade Data - HS Code 030787 Smoked, dried, salted or in brine, even in shell, abalone "Haliotis spp." (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	4,703	104	-16	4	5
1	Hong Kong	1,743	29	-62	16	14
2	South Africa	1,522	28	384	-	-
3	Chile	556	24	340	-	-
4	Australia	497	6	144	29	18
5	China	263	14	184	-24	-4
6	Japan	105	2	126	-53	-44
7	South Korea	25	1	-89	-	-1
8	New Zealand	-	-	-	-	-
9	Singapore	-	-	-	-	-
10	Taiwan	-	-	-	-	-

AUS - Trade Data - HS Code 030787 Smoked, dried, salted or in brine, even in shell, abalone "Haliotis spp." (Export):

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

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Abalone

USA - Trade Data - HS Code 030783 Frozen Abalone

(Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-	World	11,845	301	-7	28	32
1	Australia	6,576	174	-20	37	43
2	Mexico	1,814	32	42	2	1
3	Chile	1,764	51	-16	36	38
4	South Korea	729	20	13	72	67
5	China	565	17	214	11	-1
6	Hong Kong	204	2	-42	-	-
7	Vietnam	194	4	-	-	-
8	The Philippines	-	-	-	-	-
9	New Zealand	-	-	-	-	-
10	Malaysia	-	-	-	-	-

AUS - Trade Data - HS Code 030783 Frozen Abalone

(Export):

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

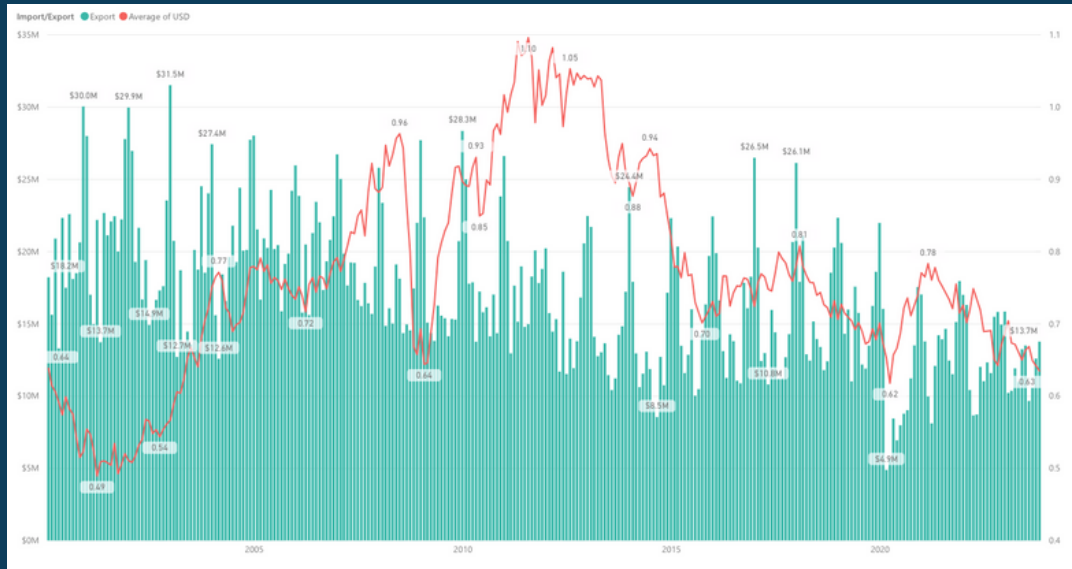
Source: ITC Trade Map, 2023

FRDC - Trade Data

Abalone Exports - Value

AUS - Trade Data - Species: Abalone

(Exports):



Value of Exports - Abalone

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

Value of Exports - Commodity Breakdown

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

Leading Export Destinations - Value

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

Export Value by State

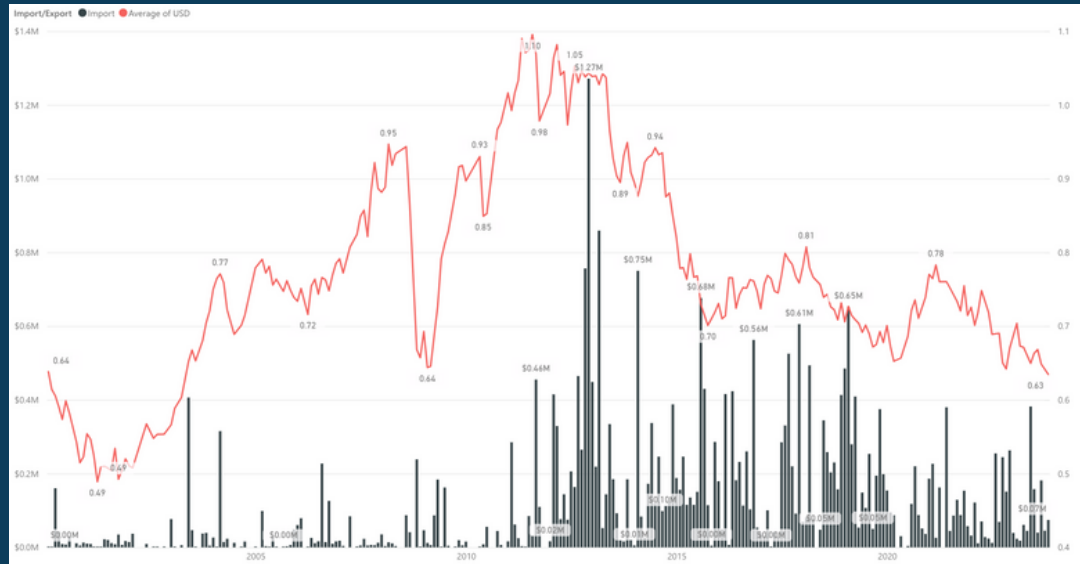
Source: FRDC, 2023

FRDC - Trade Data

Abalone Imports - Value

AUS - Trade Data - Species: Abalone

(Imports):



Value of Imports - Abalone

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

Value of Imports - Commodity Breakdown

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

Leading Import Sources - Value

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

Import Value by State

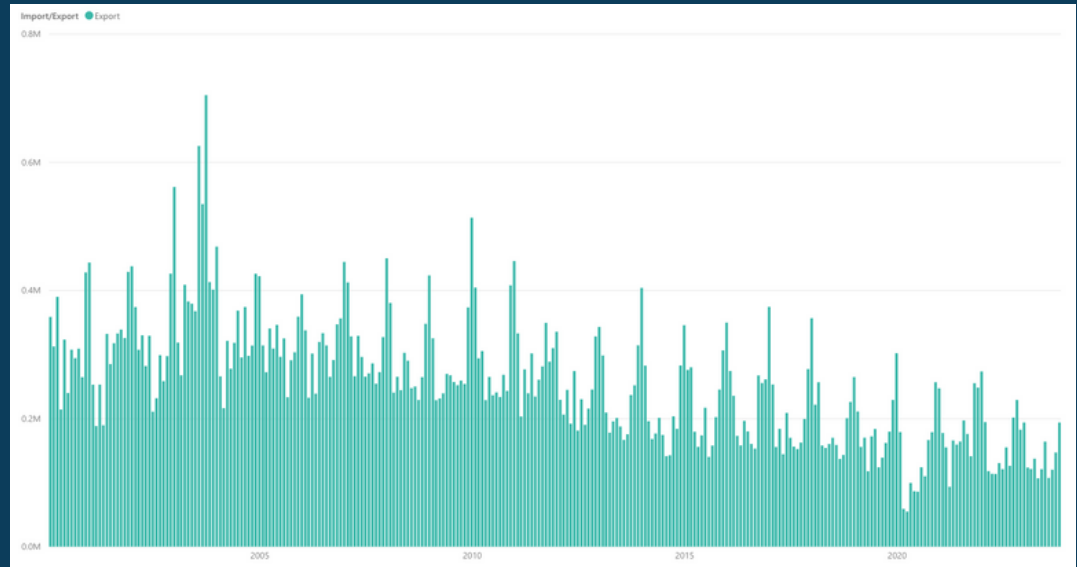
Source: FRDC, 2023

FRDC - Trade Data

Abalone Exports - Volume

AUS - Trade Data - Species: Abalone

(Exports):



Volume of Exports - Abalone

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

Volume of Exports - Commodity Breakdown

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

Leading Export Destinations - Volume

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

Export Volume by State

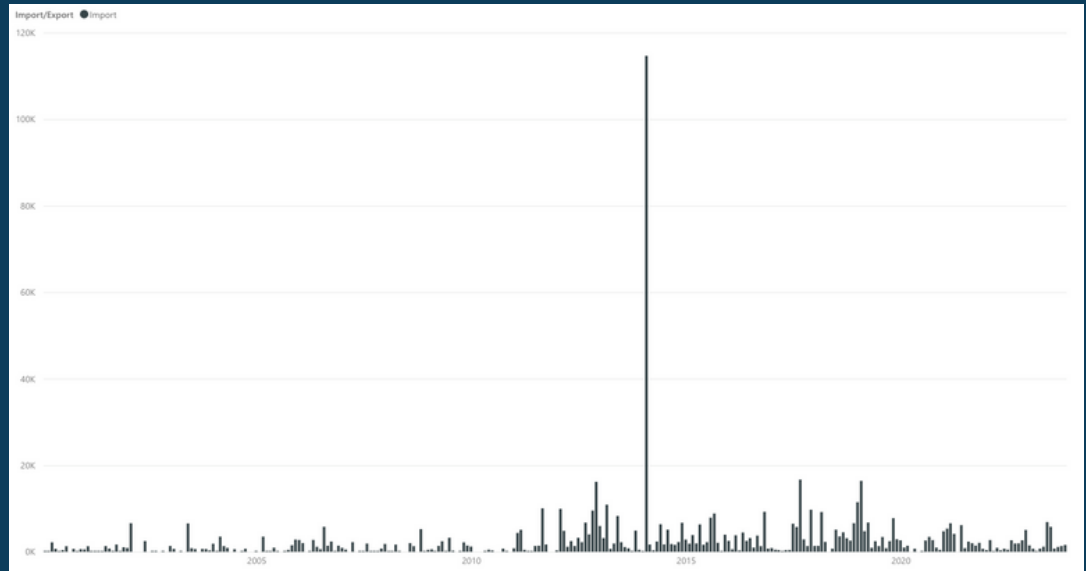
Source: FRDC, 2023

FRDC - Trade Data

Abalone Imports - Volume

AUS - Trade Data - Species: Abalone

(Imports):



Volume of Imports - Abalone

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

Volume of Imports - Commodity Breakdown

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

Leading Import Sources - Volume

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

Import Volume by State

Source: FRDC, 2023

FRDC - Trade Data Sourced from FAO

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

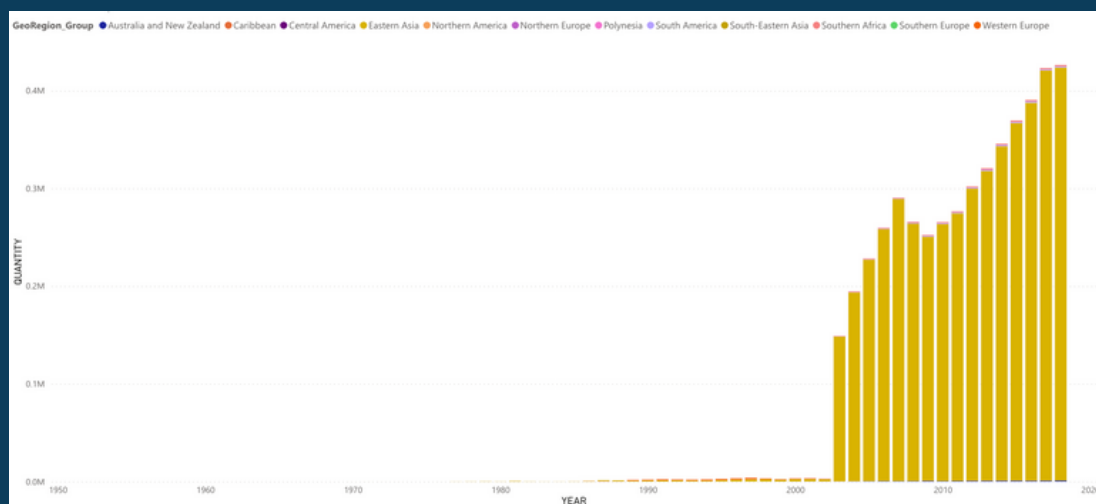
ISSCAAP Species: Abalone, Winkles, Conchs

Production

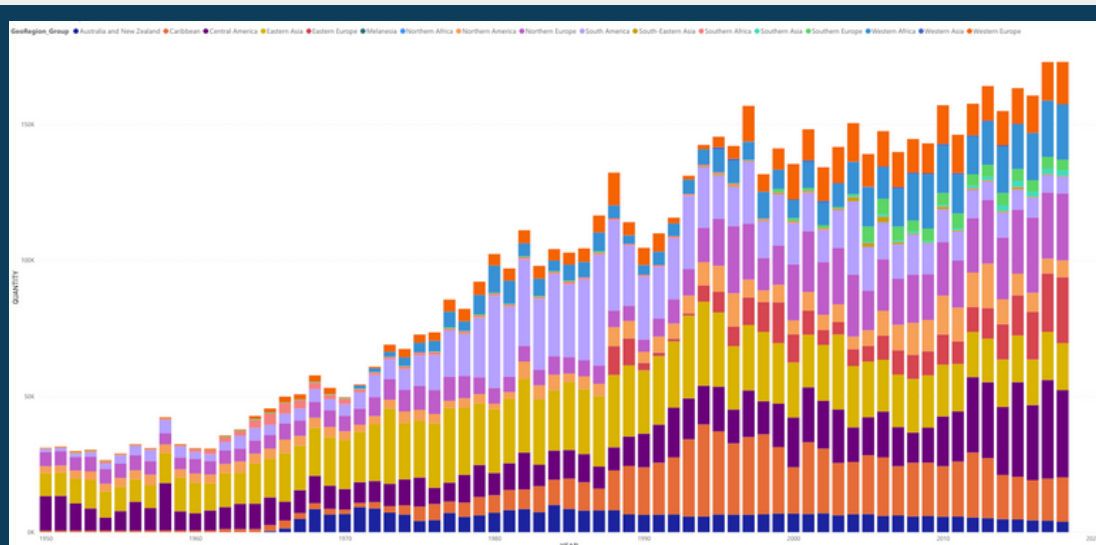
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	2 235	1 662	2 197
United States of America	Tonnes – net product weight	4 925	3 327	3 752

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	121 364	89 599	133 724
United States of America	Value (USD 1000)	106 021	69 919	71 753

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 - USA Market Overview](#)

[Austrade - USA Market Profile](#)

[EU Chafea - USA Market Overview](#)

[DFAT - US Country Brief](#)

[DFAT - US Market Insights](#)

[Enterprise Singapore - USA Market Profile](#)

[HKTDC Research - USA Market Profile](#)

[Santandar Trade Markets - USA Market Overview](#)

CONSUMER INSIGHTS

[GWI - US Consumer Snapshot](#)

[Raydiant - The State of Consumer Behaviour in the US](#)

[Santandar Trade Markets - Reaching the American Consumer](#)

CATEGORY & CHANNEL INSIGHTS

[Euromonitor International - USA Fish & Seafood Category Overview](#)

[Fisheries Research and Development Corporation \(FRDC\) - Australia-Specific Trade Data](#)

[International Trade Centre - Market-Specific Trade Data](#)

[McKinsey & Company - The State of Grocery Retail 2021 - North America](#)

[National Restaurant Association - The State of the Restaurant Industry 2021](#)

[Seafish UK - USA Export Guide](#)

MARKET ACCESS INSIGHTS

[UNCTAD - USA Investment Policy Hub](#)

[USDA - US FDA Guidance & Regulation](#)

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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