



USA Market Summary & Category Data for Fish & Seafood - Southern Bluefin Tuna

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 just over 7 hours a day on the internet, approximately 2 hours and 15 minutes of which is dedicated to social media usage.
- There are an estimated 307.2 million active social media users in the USA with an approximate 92% penetration.
- 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 2022 Report





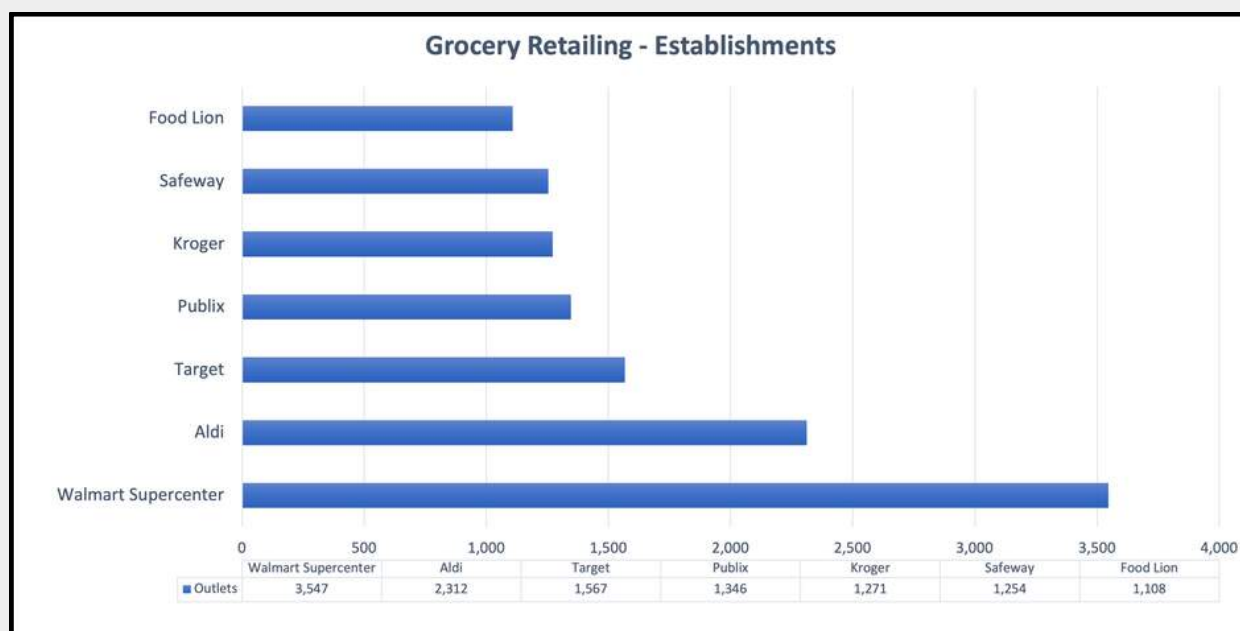
Grocery Retail Channel Developments

Key Trends:

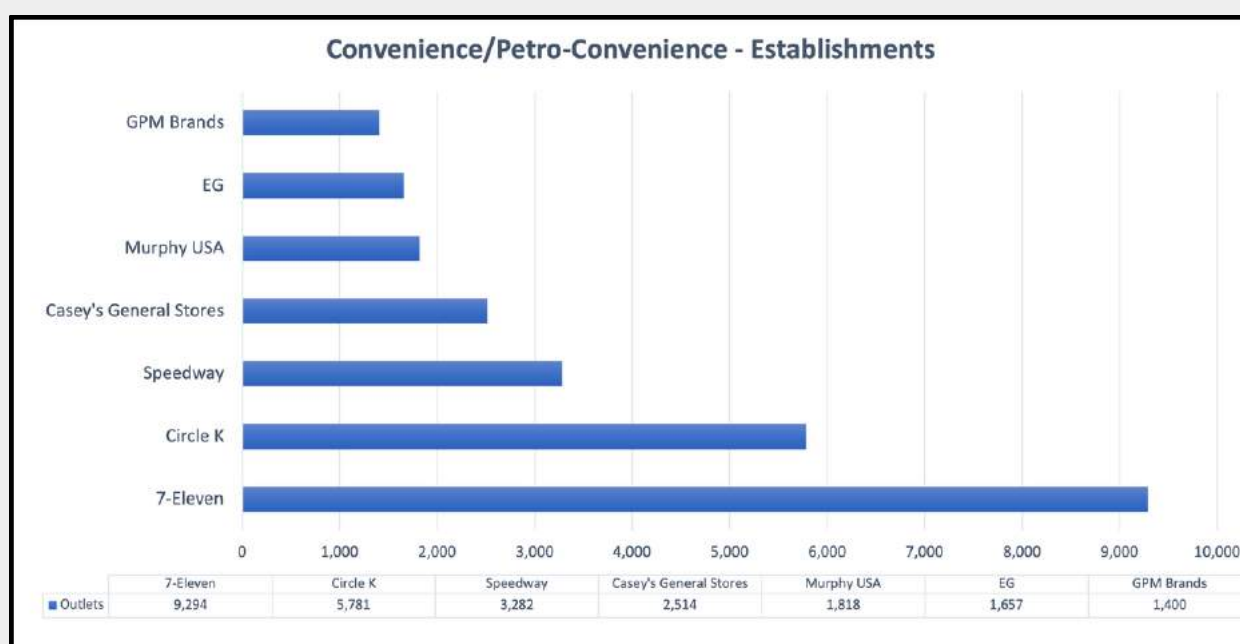
- Traditional grocery retailers suffered the most of all businesses in the grocery retail channel due to reduced capacity to implement social distancing and necessary sanitary measures in-store, along with the fact that many were classed to be non-essential businesses and therefore involuntarily closed 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



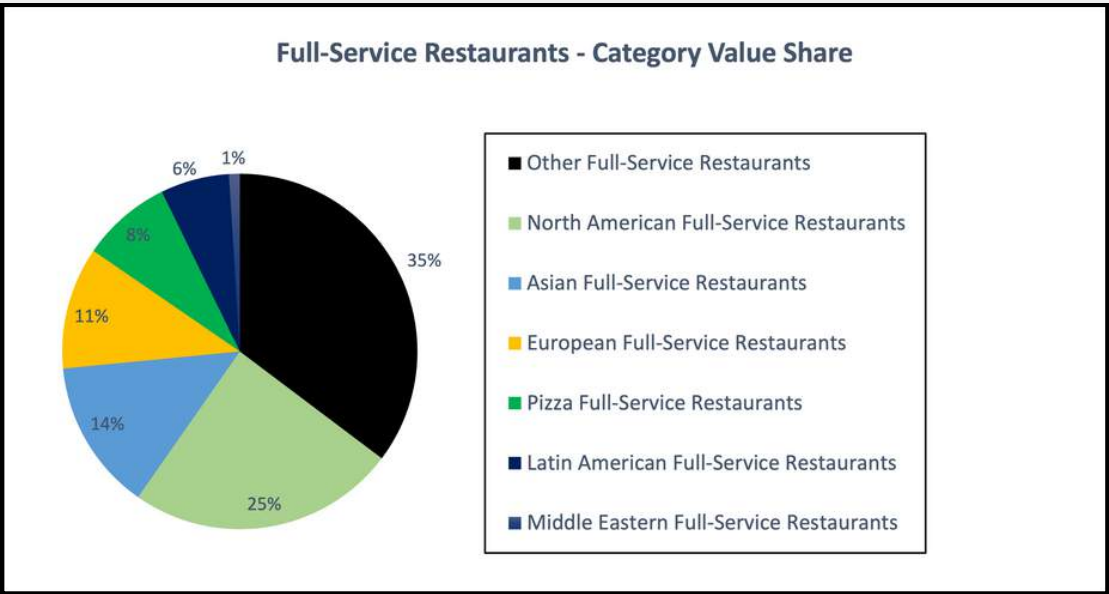
Foodservice Channel Developments

Key Trends:

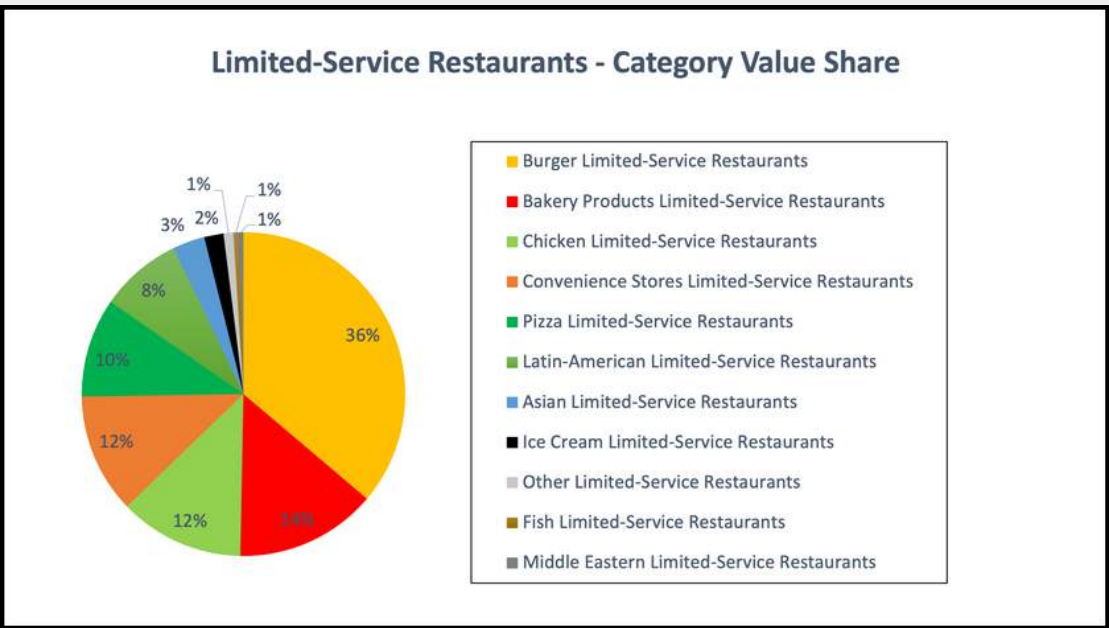
- Full-service restaurants in the USA, mostly independent, have seen frequent negative sales growth following the start of the COVID-19 pandemic as consumers have turned away from dine-in eating experiences. Foodservice businesses saw the most job losses of any industry in the USA in 2020. Restaurants 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.

Country	Sector	Category	Segment	Year	Value M USD	Syr 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

Frozen Southern Bluefin Tunas in the USA

USA - Trade Data - HS Code 030346 Frozen Southern Bluefin Tunas (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	972	26	30	-13	-11
1	Japan	543	13	-20	-5	-8
2	Indonesia	294	10	-	-	-
3	South Korea	135	3	369	24	32
4	Canada	-	-	-	-	-
5	Australia	-	-	-	-	-
6	Taiwan	-	-	-	-	-
7	New Zealand	-	-	-	-	-
8	South Africa	-	-	-	-	-
9	Brazil	-	-	-	-	-
10	United Arab Emirates	-	-	-	-	-

AUS - Trade Data - HS Code 030346 Frozen Southern Bluefin Tunas (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	82,622	7,767	22	-5	-3
1	Japan	80,060	7,481	19	-5	-2
2	South Korea	2,008	247	-	-58	-3
3	Hong Kong	55	40	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Southern Bluefin Tunas in the USA

USA - Trade Data - HS Code 030236 Fresh or Chilled Southern Bluefin Tunas (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-	World	5,300	338	-30	81	70
1	Australia	3,455	223	-38	86	86
2	South Africa	1,058	55	-1	55	24
3	New Zealand	788	61	-8	191	192
4	Canada	-	-	-	-	-
5	South Korea	-	-	-	-	-
6	Indonesia	-	-	-	-	-
7	France	-	-	-	-	-
8	Greece	-	-	-	-	-
9	Italy	-	-	-	-	-
10	United Arab Emirates	-	-	-	-	-

AUS - Trade Data - HS Code 030236 Fresh or Chilled Southern Bluefin Tunas (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	5,888	588	-22	-13	-12
1	Japan	3,425	361	-7	-23	-22
2	United States	2,420	224	-29	84	79
3	Canada	21	2	-	-	-
4	Taiwan	15	1	-	-	-
5	Fiji	5	0	-	-	-
6	Vietnam	3	0	-	-	-
7	New Zealand	-	-	-	-	-
8	Singapore	-	-	-	-	-
9	France	-	-	-	-	-
10	Italy	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Atlantic and Pacific Bluefin Tuna in the USA

USA - Trade Data - HS Code 030235 Fresh or chilled Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) (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	110,078	4,286	36	21	19
1	Mexico	73,349	3,182	40	39	31
2	Spain	30,284	923	36	10	10
3	Japan	4,040	60	10	-6	-11
4	Canada	1,395	90	-43	9	8
5	Malta	771	23	3,415	-	-
6	France	137	5	-	-62	-39
7	Turkey	95	3	-47	-66	-69
8	South Africa	5	0	-95	-36	-
9	South Korea	-	-	-	-	-
10	Croatia	-	-	-	-	-

AUS - Trade Data - HS Code 030235 Fresh or chilled Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) (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	44	4	-93	173	41
1	Japan	22	2	-78	117	19
2	China	16	2	-	-	-
3	United States	7	1	-99	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Atlantic and Pacific Bluefin Tuna in the USA

USA - Trade Data - HS Code 030345 Frozen Atlantic and Pacific (Import):
bluefin tuna (*Thunnus thynnus*, *Thunnus orientalis*)

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	3,474	61	-5	17	-11
1	Japan	3,048	54	0	18	5
2	South Korea	248	4	-38	64	47
3	Malta	109	2	-9	-	-
4	Spain	27	0	-	-	-
5	Croatia	22	0	34	-48	-
6	Turkey	14	0	-75	-15	-
7	Algeria	3	0	-	-	-
8	Costa Rica	3	0	-	-	-
9	Canada	-	-	-	-	-
10	China	-	-	-	-	-

AUS - Trade Data - HS Code 030345 Frozen Atlantic and Pacific (Export):
bluefin tuna (*Thunnus thynnus*, *Thunnus orientalis*)

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	-	-	-
1	Papua New Guinea	1	0	-	-	-
2	Japan	-	-	-	-	-
3	South Korea	-	-	-	-	-
4	China	-	-	-	-	-
5	United States	-	-	-	-	-
6	Hong Kong	-	-	-	-	-
7	Singapore	-	-	-	-	-
8	Portugal	-	-	-	-	-
9	United Arab Emirates	-	-	-	-	-
10	Spain	-	-	-	-	-

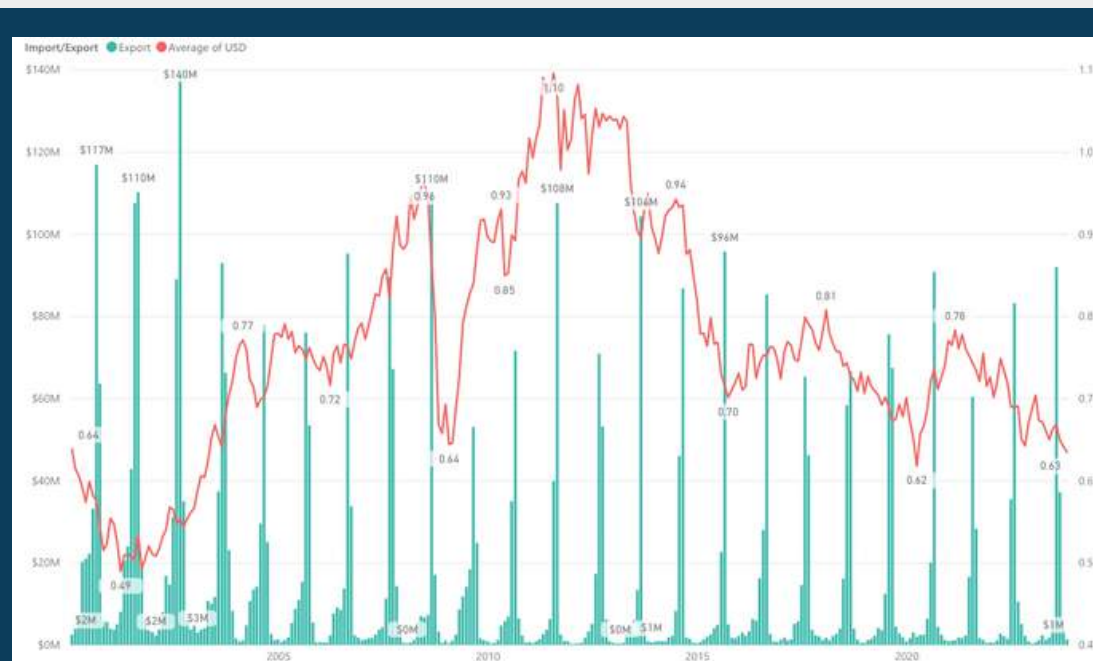
Source: ITC Trade Map, 2023

FRDC - Trade Data

Tuna Exports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Exports):



Value of Exports - Tuna

Commodity Description	Value
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	\$1,789,121,600
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	\$762,501,601
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	\$565,482,999
Tunas (other than albacore, yellowfin and skipjack), frozen (excl. fish fillets, other fish meat, livers and roes)	\$255,630,533
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (excl. fish fillets, other fish meat, livers and roes)	\$230,544,235
Frozen or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	\$215,085,130
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$107,624,749
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$95,612,399
Tuna meat, frozen (excl. fillets)	\$92,999,701
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. tunas, skipjack and bonito (Sarda spp.) of Chapter 03)	\$66,130,530
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$56,529,241
Live Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	\$32,457,996
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	\$20,198,163
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$19,827,096
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	\$18,723,896
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	\$18,523,472
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	\$18,340,920
Frozen bluefin tunas (Thunnus thynnus) (excl. southern bluefin tunas; fillets and other meat of HS 0304 and livers and roes)	\$6,932,639

Value of Exports - Top Commodity Breakdown

Country	Value
Japan	\$4,028,275,351
United States of America	\$174,183,601
New Zealand	\$59,438,347
Thailand	\$26,110,649
China	\$18,312,651
Korea, Republic of	\$16,390,990
Iran, Islamic Republic of	\$14,738,437
Samoa (American)	\$11,017,294
Spain	\$9,204,075
Iran	\$6,603,407
Singapore	\$5,413,078
Vietnam	\$4,387,095
Korea Republic of	\$4,342,004
Hong Kong	\$3,140,043
Saudi Arabia	\$2,216,919
Canada	\$1,564,196

Leading Export Destinations - Value

State	Value
SA	\$3,684,243,751
QLD	\$354,746,902
NSW	\$181,915,534
WA	\$71,915,402
VIC	\$50,744,315
Foreign (re-export)	\$50,374,147
TAS	\$3,100,813
NT	\$8,712

Export Value by State

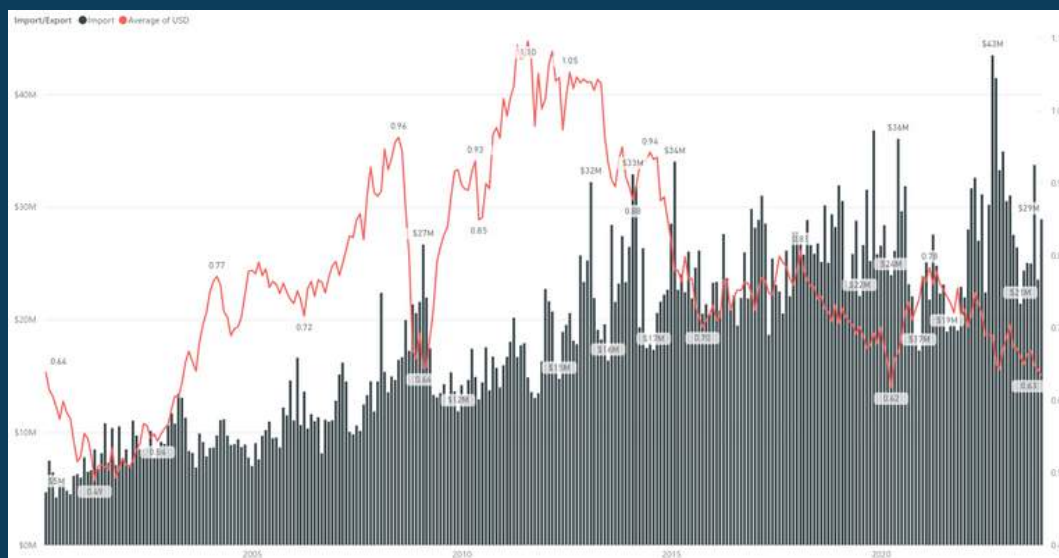
Source: FRDC, 2023

FRDC - Trade Data

Tuna Imports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Imports):



Commodity Description	Value
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 03)	\$5,006,110,765
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers; and goods of Chapter 03)	\$101,029,189
Frozen fillets of tunas (of the genus Thunnus), skipjack or stripe-bellied bonito (Katsuwonus) pelamis	\$63,409,405
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) and other fish of the tribe Thunnini or Sardin (excl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 03)	\$15,918,728
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	\$14,680,049
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	\$11,311,415
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	\$6,441,077
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	\$5,187,094
Fresh or chilled yellowfin tunas (Thunnus albacares) (including fillets and other)	\$4,704,928
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	\$2,652,640
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	\$2,090,210
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$1,665,090
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (including fillets and other)	\$1,247,223
Fresh or chilled skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	\$990,915
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis) (excl. fillets and other meat of HS 0304 and livers and roes)	\$814,320
Frozen tunas (of the genus Thunnus) (excluding those of HS 030341 to 030346, fil)	\$549,777
Fresh or chilled bigeye tunas (Thunnus obesus) (including fillets and other meat)	\$302,210
Fresh or chilled Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	\$279,823
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin and bigeye tunas; Atlantic and Pacific bluefin and Southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	\$242,030

Value of Imports - Top Commodity Breakdown

Country	Value
Thailand	\$4,563,354,140
Indonesia	\$478,018,471
Vietnam	\$45,942,670
Philippines	\$34,568,214
Italy	\$25,894,111
Japan	\$16,190,331
New Zealand	\$13,076,367
China	\$12,760,744
Korea, Republic of	\$9,462,468
Fiji	\$7,837,208
Maldives	\$7,779,705
Spain	\$7,009,781
Solomon Islands	\$5,204,669
United States of America	\$4,964,334
Taiwan	\$4,817,183

Leading Import Sources - Value

State	Value
VIC	\$3,057,844,339
NSW	\$1,195,499,056
QLD	\$532,199,353
WA	\$248,301,899
SA	\$228,181,157
TAS	\$858,987
NT	\$33,604

Import Value by State

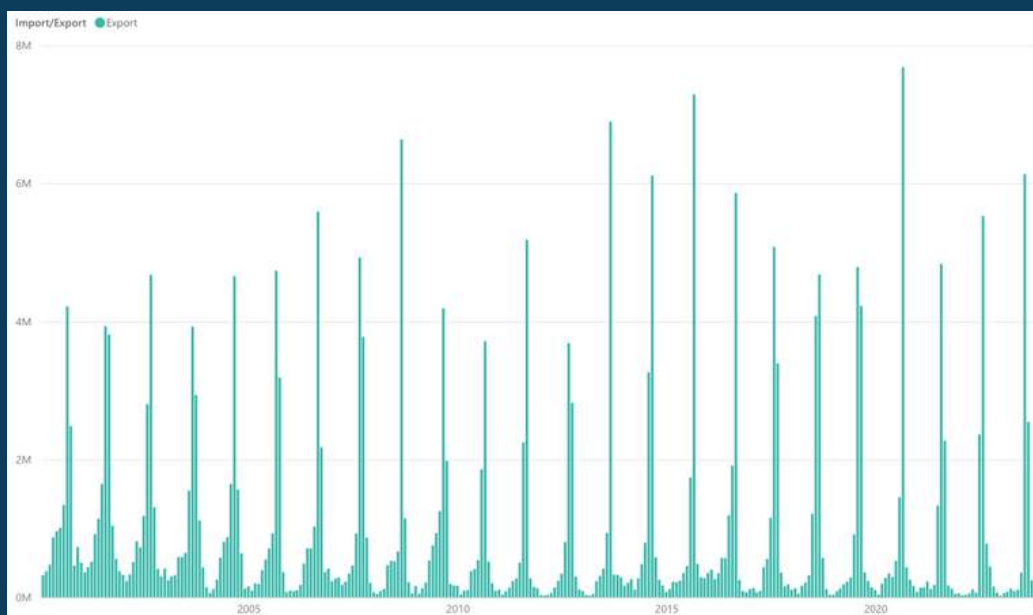
Source: FRDC, 2023

FRDC - Trade Data

Tuna Exports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Exports):



Volume of Exports - Tuna

Commodity Description	Quantity
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	95,864,268
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	53,321,858
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	25,988,210
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	21,915,708
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. tunas, skipjack and bonito (Sarda spp.) of Chapter 03)	15,209,780
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	8,973,080
Tunas (other than albacore, yellowfin or skipjack), frozen (excl. fish fillets, other fish meat, livers and roes)	8,459,799
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (excl. fish fillets, other fish meat, livers and roes)	8,428,000
Frozen Southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	7,177,935
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	6,442,253
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	4,242,724
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	3,791,635
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	3,540,469
Tuna meat, frozen (excl. fillets)	3,261,347
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	1,655,064
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	1,330,096
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	479,980
Live Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	470,729
Frozen bluefin tunas (Thunnus thynnus) (excl. southern bluefin tunas; fillets and other meat of HS 0304 and livers and roes)	430,101

Volume of Exports - Top 20 Commodity Breakdown

Country	Quantity
Japan	227,190,366
New Zealand	14,203,390
United States of America	12,596,791
Thailand	7,074,013
Samoa (American)	3,825,161
Spain	2,196,220
Vietnam	1,402,806
Korea, Republic of	917,229
China	831,180
Singapore	578,866
Korea Republic of	307,552
Indonesia	243,333
Federated States of Micronesia	210,668
Hong Kong	194,432
Papua New Guinea	168,638
Iran	122,676

Leading Export Destinations - Volume

State	Quantity
SA	193,645,540
QLD	44,020,148
NSW	13,373,338
Foreign (re-export)	11,673,355
WA	6,372,919
VIC	3,777,137
TAS	159,102
NT	964

Export Volume by State

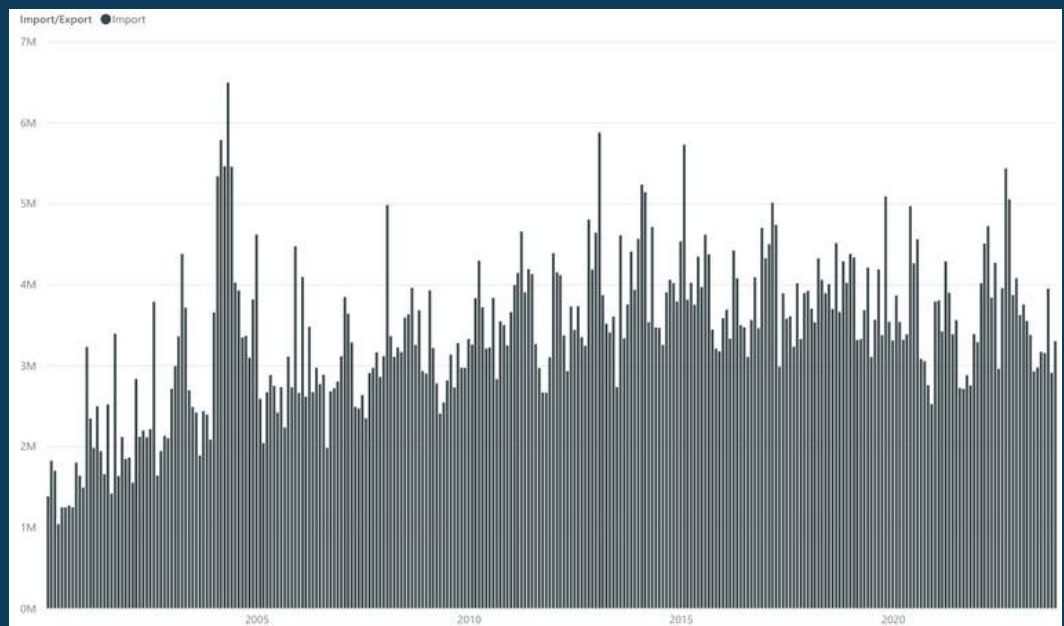
Source: FRDC, 2023

FRDC - Trade Data

Tuna Imports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Imports):



Volume of Imports - Tuna

Commodity Description	Quantity
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 03)	918,973,122
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers; and goods of Chapter 03)	21,766,690
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	11,228,657
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) and other fish of the tribes Thunnini or Sardinii (incl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 03)	5,439,597
Frozen fillets of tunas (of the genus Thunnus), skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis)	4,547,135
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	2,202,656
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	2,049,367
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	1,748,507
Fresh or chilled skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	1,019,927
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	391,474
Fresh or chilled yellowfin tunas (Thunnus albacares) (including fillets and other)	336,810
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	192,351
Frozen tunas (of the genus Thunnus) (excluding those of HS 03041 to 03046, fil)	168,893
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excluding fillets and other)	131,276
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin and bigeye tunas; Atlantic and Pacific bluefin and Southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	111,420
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	62,967
Tunas, frozen (excl. albacore, longfinned and yellowfin tuna, fish fillets and other fish meat of 0304, livers and roes)	60,516
Frozen tunas of the genus Thunnus (excl. albacore or longfinned tunas; yellowfin tunas; bigeye tunas; bluefin tunas; southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	60,516
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	48,624

Volume of Imports - Top Commodity Breakdown

Country	Quantity
Thailand	869,301,361
Indonesia	58,481,384
New Zealand	9,058,068
Vietnam	7,361,192
Philippines	6,415,239
Japan	3,792,673
China	3,072,065
Italy	2,343,340
Country Unknown	1,662,000
Korea, Republic of	1,492,826
Fiji	1,131,630
Solomon Islands	763,632
Papua New Guinea	750,153
United States of America	687,052
Maldives	675,262

Leading Import Sources - Volume

State	Quantity
VIC	540,531,651
NSW	220,804,843
QLD	100,836,115
SA	58,729,016
WA	49,538,187
TAS	267,051
NT	3,470

Import Volume by State

Source: FRDC, 2023

FRDC - Trade Data Sourced from FAO

Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Tunas, Bonitos, Billfishes

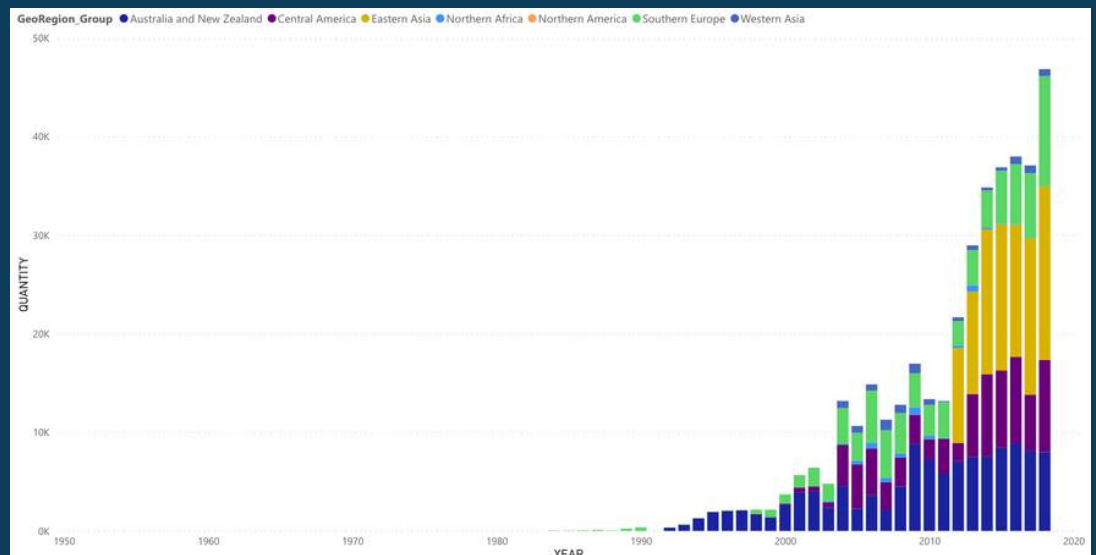
ISSCAAP Group: Tunas, Bonitos, Billfishes

Production

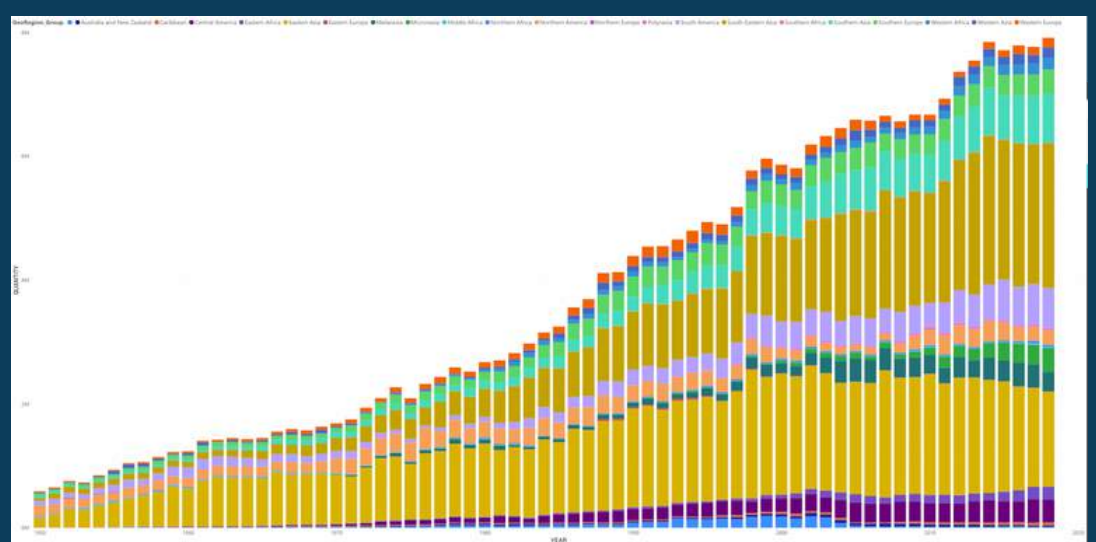
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes - net product weight	50 128	53 460 E	57 143
United States of America	Tonnes - net product weight	286 341	334 435	307 363

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	291 360	292 644 E	352 602
United States of America	Value (USD 1000)	2 012 508	2 036 003	2 138 683

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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