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

January 2024

Seafood Industry Australia
The Voice of Australian Seafood

GREAT AUSTRALIAN SEAFOOD

Economic Indicators

- GDP (USD): **$17.52 trillion** as of January 2024.
- GDP per capita (USD): **$12,621** as of December 2023.
- Currency: **Chinese Yuan** (CNY).
- Exchange Rate: **1 CNY = 0.21 AUD** (01/02/24).
- Mercer's 2023 Quality of Living Ranking: China's highest-ranking city is **Shanghai at 109**, followed by **Beijing at 126** and **Guangzhou at 132**.
- Human Development Index: **0.768** and ranked **79th** as of 2021.
- Logistics Performance Index: **3.70** and ranked **19th** globally as of 2023.

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - China is a party to 107 Bilateral Investment Treaties (BITs) and 19 Treaties with International Provisions (TIPs) currently in force.
  - China and Australia are both partners to the Regional Comprehensive Economic Partnership (RCEP), the world's largest trade deal, which was signed in 2020 but is not yet in force.
  - China and Australia are also partnered by the bilateral Australia - China FTA (ChAFTA) which, upon full implementation, allows 95% of Australian exports to enter China tariff-free.

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

Demographic Indicators

- Total Population: Approximately **1.409 billion** as of January 2024.
- Expatriate Population: Approximately **845,697** as of 2020 as per the National Census of China.
- Population Growth: **-0.15%** as of 2023.
- Median Age: Approximately **39.08 years old**.
- Urban Population: **66.2%** as of 2022.
- **Population Ethnicity:**
  - Han Chinese 91.65%
  - Others (including Hui, Manchu and Uyghur) 7.08%
  - Zhuang 1.27%
- **Dominant Religious Groups:**
  - 73.56% No religion
  - 15.87% Buddhist
  - 2.53% Christian
  - 0.45% Muslim
  - 7.59% Other (including Taoist, Hindu)

Source: Pew Research, UN, MacroTrends, The World Bank, CIA World Factbook, Encyclopedia Britannica

Consumer Behaviour & Societal Trends

Key Trends:

- The younger Chinese consumer base typically is less focused on saving than their older counterparts and uses the would-be savings for leisure purchases, prioritising quality over price. This consumption trend is most prominent in the major cities along the eastern coast, where per capita income and, thus, purchasing power is much higher.

- There is a fast-growing middle class, already at nearly 40% of the Chinese population, that is expected to soon become 76% of the urban population. This population segment has a steadily rising real purchasing power. It is using it to contribute to increases in total consumer spending that analysts believe will match that of the USA by 2030.

- Against the background of increasing nationalist sentiment amongst the Chinese government and population, there has been public backlash against major Western brands, which has filtered through to brands such as Nike and Adidas essentially being "blacklisted" from major E-commerce platforms app stores, etc.

- Chinese consumers inquire about products they are buying prior to purchasing relatively more than other major nations, especially regarding foreign products, with word of mouth being the most crucial source of persuasion.

- Chinese consumers have created the world's largest market for luxury brands, as their 2018 spending on luxury goods was estimated at US$115 billion, a third of the global total. While the rate of COVID-19 infections in China subsides, consumer confidence is rising, and demand for luxury products is increasing again dramatically.

- The importance of the group over the individual is a very prominent attitude throughout Chinese society, and, therefore, businesses that market their products towards groups fare relatively better. Furthermore, once a product is accepted by its target market, its popularity will increase exponentially due to the size and connectedness of the overall market.

- The prominence and popularity of many major online buy-now-pay-later platforms in China is driving much of the increases in consumer expenditure in 2021, as Chinese consumers are increasingly willing to buy items on credit. Further raising household spending back to pre-pandemic levels, which drove China's positive annual growth figure for 2020, is the government's stimulus bill released in mid-2020 of over half a billion dollars (USD) aimed at consumers.

- The percentage of products purchased in the late evening or overnight, as part of the 'night economy', is forecasted to rise significantly in future years due to workers progressively working until later hours as expected by their employers.

- Like much of the world, the portion of consumer spending toward essential goods has improved dramatically since the start of the COVID-19 pandemic because of financial uncertainty surrounding individuals' future financial statuses. In China, much of this increase has gone towards spending on food and beverage. However, this trend has been overwhelmingly present only amongst local products due to trade tensions and quality concerns.

Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

- As of February 2022, there were an estimated 1.02 billion internet users with a penetration rate of 70.9%, a year-on-year growth of 36 million since 2021.

- China maintains a significant social media user base - accounting for 68% of the population with 983.3 million Chinese users connected to popular social networking services such as WeChat and Sina Weibo.

Source: Digital in 2022 Report

Grocery Retail Channel Developments

Key Trends:

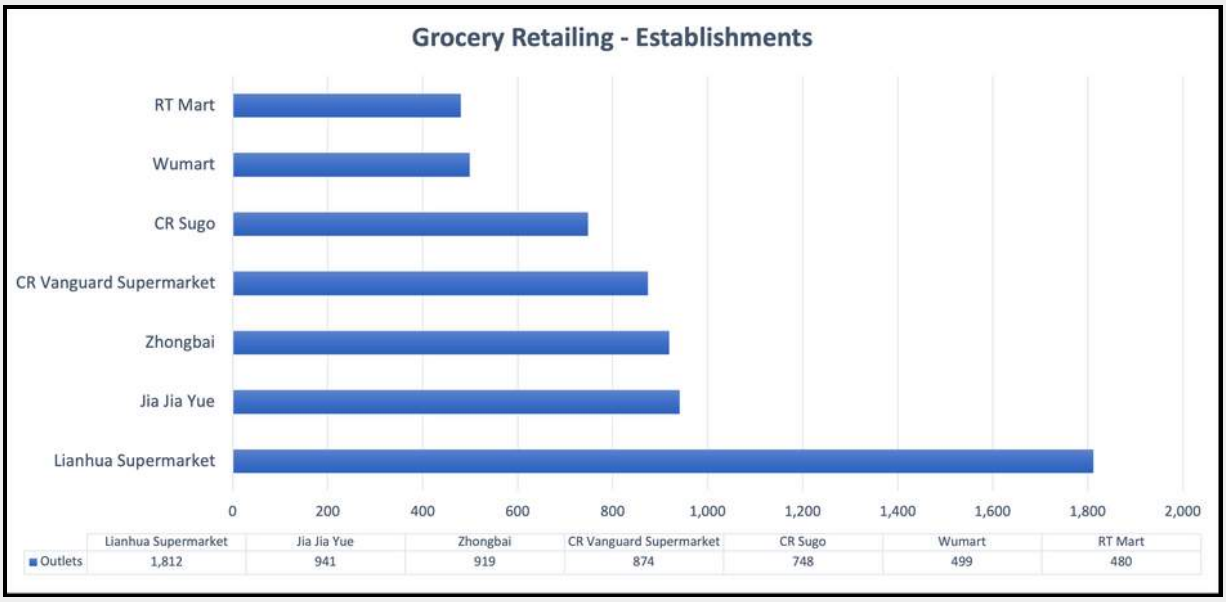
- Spending on groceries has remained strong throughout the COVID-19 pandemic in China. While overall spending decreased at times, the desire for essential goods, particularly fresh meat and vegetables, rose dramatically.
- Traditional grocery retail outlets in China include wet markets, many of which were forcibly closed in 2020 as one in Wuhan was linked to the outbreak of the COVID-19 virus. Consequently, these businesses have lost significant market share, and the future of wet markets as a major component of the Chinese grocery retail industry is under question.
- Due to convenience stores being deemed essential services and thus being exempt from lockdown measures, coupled with having extended opening hours, these businesses were able to retain high sales volume amid reduced foot traffic nationwide.
- To support social distancing priorities amongst customers at grocery retailers, cashless payments have surged in prevalence and value whilst AI technology is increasingly being used to minimise physical contact with staff in stores. This trend is most profound in convenience stores, where self-checkout options facilitated by facial recognition are common, saving retailers costs.
- Supermarkets and hypermarkets experienced the greatest sales volume improvements following the COVID-19 pandemic due to the lower prices and increased convenience offered to shoppers. However, the potential profits these retailers could earn was restricted by Chinese government price controls implemented in 2020 to stop price gouging.
- Amid stay-at-home measures in China, online grocery shopping and delivery is a significant growth industry, with retailer revenue far exceeding investment in early 2021. By 2022, online sales are forecast to account for around a quarter of total grocery sales in China at a total value of over US$1 trillion.

- The range of popular methods for receiving groceries ordered online in China is diversifying, a notable example being the “community group-buy” where residents of an area all make a group purchase through WeChat and receive it via delivery for a discounted rate.

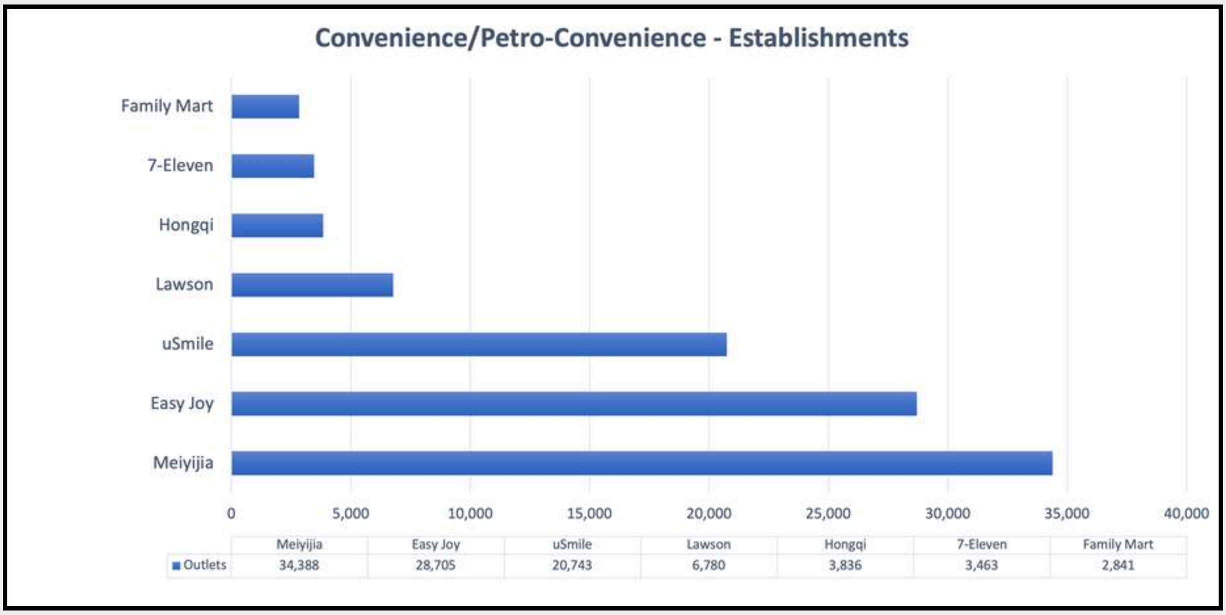
- E-Commerce giants JD.com and Alibaba are deepening their investments in grocery retail businesses, with the latter doubling its ownership of physical stores in the second half of 2020. While these retailers are traditionally viewed as having low profit margins, due to the improvements in demand since the outbreak of COVID-19 and the popularity of buying from omni-channel retailers, takeovers have grown in favourability.

Source: Euromonitor

Grocery Retailing Brand Outlets:



Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- Limited-service restaurants are growing in presence yet remain relatively uncommon in China because overseas fast-food chains are too late to establish themselves on the Chinese mainland. Consequently, independent businesses dominate the foodservice landscape. This fact was illustrated by the sales value in the limited-service sector in 2019 being more than seven times higher in Japan than in China.

- Restaurant business conditions suffered greatly throughout 2020 due to stay-at-home measures that forced closures for more than two months. Full-service restaurants suffered the most as these are primarily independent and thus have relatively less capital to withstand short-term losses. Leading chain operators took advantage of this situation to continue pre-pandemic plans for expansion by buying out these restaurants in locations already tailored to foodservice.

- The foodservice channel is expected to recover in 2021 and grow further in future years as consumer spending in the Chinese economy is forecasted to rise along with digitisation and the consequent accessibility of restaurant items.

- The long-term trend towards at-home eating has been hurried by the COVID-19 pandemic, leading fast-food giant Yum China to estimate that more than 50% of sales is now home delivery and takeout. The flow-on effect of this trend has made its way to menus, with more diverse items catering to home delivery such as ready-to-eat (RTE) meals, meal kits and buckets of boba tea.

- AI technology is increasingly being used to improve convenience when purchasing meals, illustrated by fast-food chains such as KFC launching driverless vans from where customers can make and collect orders, along with “smart lockers” from where takeout can be securely collected from.

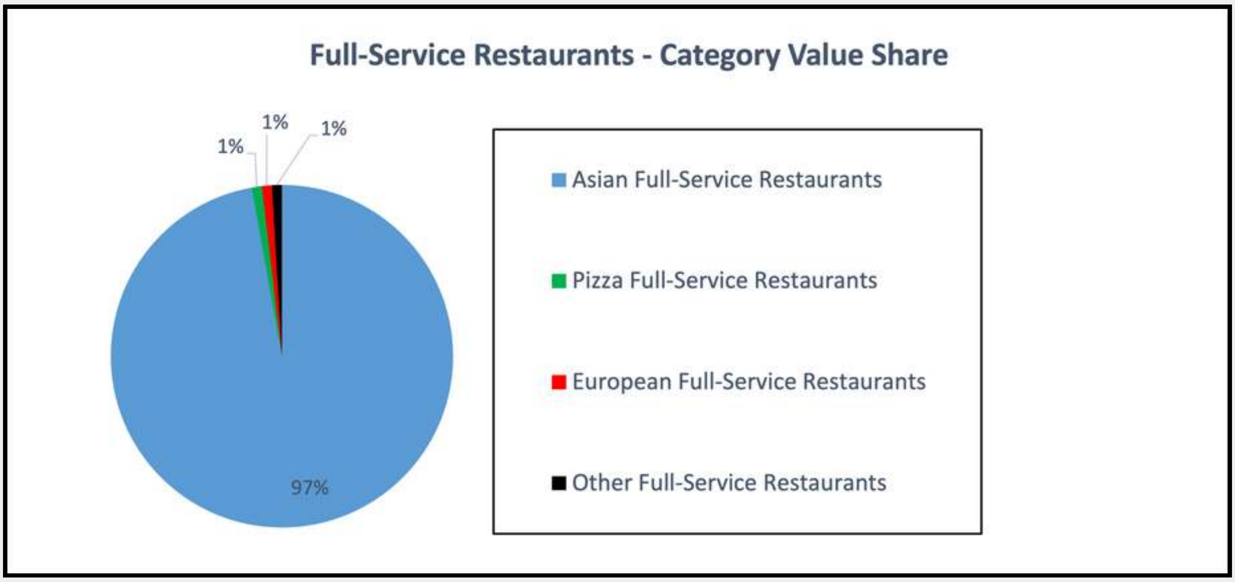
- Health-conscious eating has consistently risen in prominence, causing more restaurants to offer semi-finished meat products. For example, KFC China, the largest fast-food chain on the mainland, offers boiled chicken steaks. Consumption of sugar has thus significantly fallen, creating a whole new brand of sugar-free teas and “half-sugar”.

- Plant-based meals or plant-based variations of popular dishes are becoming very popular, with international vegan food giants looking to make inroads in the Chinese market, illustrated by Beyond Meat declaring that China would be a staple point of the future international "fake meat" market.

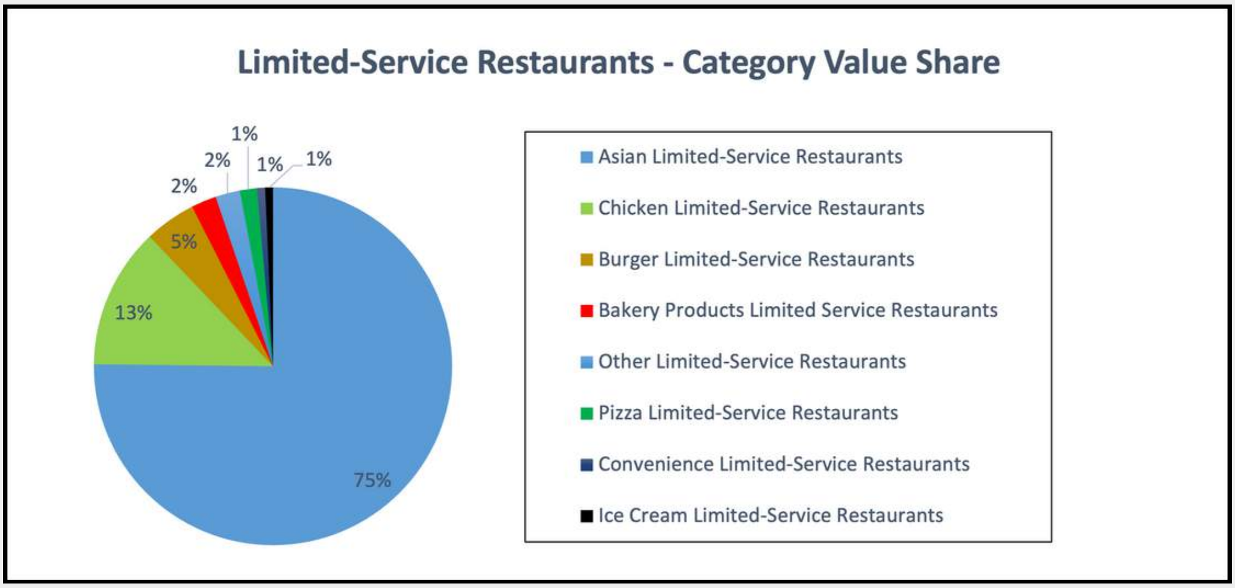
- As consumption of high-carbohydrate products is decreasing, low-alcoholic beverages have found a market niche and are most popular amongst females. The market is forecast to be valued at over 1 and a half billion (USD) in 2027.

- Dairy products remain extremely important, with almost every raw dairy ingredient used in meal production possessing a large niche market of its own. For example, whey protein is becoming increasingly desired amongst Chinese consumers as an ingredient in food and drinks.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Despite charging restaurants commissions sometimes as high as 23%, online food delivery apps in China have grown rapidly following the start of the COVID-19 pandemic in response to increased social distancing preferences amongst consumers. The total number of users of third-party delivery apps surpassed 400 million in 2020, while giants Ele.me, Meituan Waimai and Baidu Waimai dominated the market with over 80% of total sales value.

- Foreign food and beverage products are very popular on online shopping platforms such as Taobao and JD.com. They are sold from overseas to a local purchasing agent who uses these websites as a facilitator. However, a significant issue arises when the agent cannot be trusted and resorts to selling fake products at a mark-up.

- The sale of fresh food products is the highest growing and biggest sector of all in the food and drink e-commerce channel, largely due to the COVID-19 pandemic, at the beginning of which there was an estimated 10+ million new users daily. This market is forecast to be valued at $800 billion by 2023, with the biggest e-commerce shopping platforms in China all offering fresh food purchases with same-day delivery.

- Online alcohol sales are improving in proportion to the rise in at-home drinking behaviour, with 50% annual growth in online beer sales, mostly consisting of canned beer. At the same time, lagers and stout beers feature prominently too. Sales of Baiju and foreign wines also comprise an online market totalling tens of millions in value (USD).

- Online sales of semi-finished meal packages increased consistently throughout 2020, with annual growth of over 300% in major cities, most of which were in the lower-price bracket of under 9 USD and marketed towards consumers aged 18 - 30.

Key E-tailers:

- The trend amongst consumers towards increasing their share of cashless payments has best been captured by major digital wallet applications Alipay and WeChat Pay that have partnerships with thousands of online E-commerce platforms, and now together represent the primary channel for purchasing food and beverage products.

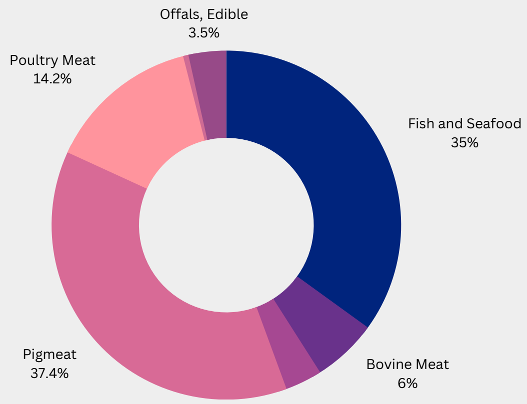
- JD.com is the largest business-to-customer (B2C) e-commerce platform in China and one of the biggest globally having, since the beginning of the COVID-19 pandemic, doubled its customer base for fresh food products.

Source: Euromonitor

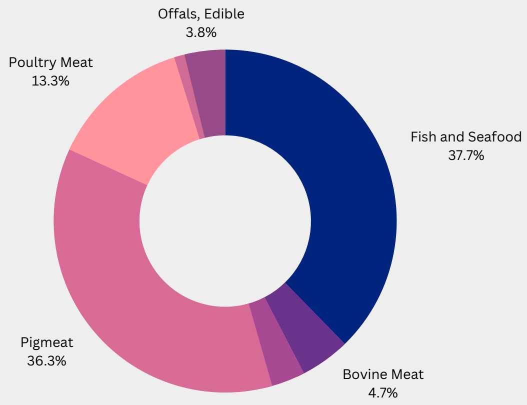
Seafood Consumption in China

- Fish and seafood supply per person in China is valued at 38.51 kg as of 2019 according to the United Nations Food and Agricultural Organization (FAO). This value has risen by 1.03% annually between 2014 - 2019, having been previously recorded as 36.59 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: 6.28 kg
    - Mutton & Goat Meat: 3.58 kg
    - Pigmeat: 39.17 kg
    - Poultry Meat: 14.82 kg
    - Meat, Other: 0.53 kg
    - Offals, Edible: 3.65 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:

- State Administration for Market Regulation (SAMR): Responsible for developing food safety laws, while also implementing domestic market inspections and registrations.
- National Health Commission (NHC): Creates and implements risk management plans for food safety in collaboration with SAMR.
- General Administration of Customs of China (GACC): Inspects imports and collects duties.
- Ministry of Commerce (MOFCOM): Regulates alcoholic product distribution and manages issues concerning trade deals and global trade laws.

Product Registration/Import Procedure:

- All businesses exporting products to China must register through the Customs website on either the "Registration Systems of Imported Food and Cosmetic Importers and Exporters" or the "internet + customs platform" page.
- Either the producer of the Food & Beverage product or the locally-based importer can conduct the rest of the customs clearance process.
- If the product being imported into China is on the "List of Food Imports Subject to Enterprise Regulation" then the foreign producer must register with the Chinese Certification and Accreditation Administration (CNCA).
- Use the Harmonised System (HS) codes available on Australia's Free Trade Agreement Portal to determine the duties that the imported product will be subject to.
- Prepare and submit necessary documentation to the GACC. Once these are checked, any applicable duties will need to be paid and customs clearance takes place.

Documentation Required:

- Certain goods have higher safety regulations and thus additional documentation such as an import quota or pre-shipment inspection certificate may be required. This is common practise for the importation of many meat and health products.
- The following documents are generally required to facilitate the import process:
  - Invoice.
  - Bill of lading.
  - Packing list.
  - ChAFTA certificate of origin (if the product is deemed to have "originated" in Australia as per ChAFTA terms). This can be obtained after emailing a completed Exporter Information C04 Form to the Australian Business Chamber.

General Labelling Requirements:

- In general, food labels must include:
  - Product name
  - Shelf life
  - Net quantity
  - Date of production
  - Ingredient list
  - Nutrition information
  - Name, address, and contact information of the producer
  - Code of product standards followed
  - Food additive declaration
  - Storage instructions
  - Importing facility registration number
  - Extra information as required for certain products, e.g. goods made for infants

Packaging Requirements:

- Food for direct consumption has to be in small packages or use clean, non-toxic materials.
- Wood packages must carry an International Plant Protection Convention (IPPC) mark.
- All packaging must be easily degradable and recyclable.

Non-Tariff Barriers:

- If shipments are found to contain anomalies, all exports of products from such industry from Australia may be denied entry into China for a specified period of time.
- As of April 2021, Australia is reportedly banned from exporting coal into China. Blanket bans like these are increasing in prevalence as relations deteriorate between the two nations.
- Certain Australian agricultural products require Australia and China to have a specific finalised import regimen before import is allowed into China. More information on these protocols can be found on the Department of Agriculture and Water Resources (DAWR) website.

Tariffs Levied:

- Chinese tariff rates are constantly changing at unpredictable instances and therefore businesses should identify the specific rate using the HS system prior to exporting.
- Australian goods are subject to a range of tariffs, the strength of which have been increased for wine, barley, beef and lamb, to name a few, and will be held in place for the next five years.

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

Category Data

Fish and Seafood in China

Key Trends:

- Total volume sales rose by 1% in 2021, with total consumption improving due to stable demand from consumers. By 2026, volume sales will grow at a 2% CAGR.
- Retail sales are expected to drop following a rapid increase in demand during 2020 amid foodservice closures and home seclusion measures, with demand now shifting back to foodservice as most establishments have been operating as usual in 2021.
- China generally imports fish for further processing into value-added products for export, with key imports including frozen cod, fresh salmon, and frozen fish.
- Crustaceans were the strongest performing category in 2021, experiencing a 4% growth rate attributed to the reopening of foodservice outlets. Most consumers tend to eat more crustaceans due to perceived difficulty in preparing crustaceans at home.
- Fish is expected to record the weakest overall volume growth. While growth was evident in retail in 2020, the easing of foodservice restrictions will see more demand for non-fish dishes such as crayfish and crab.
- Sustainability is becoming a priority for the fishing industry, with initiatives such as the Yangtze River's 10-year fishing ban and the suspension of squid fishing in some waters. The country is also aiming to minimise its proportion of fisheries at a decreasing annual rate of 1.3%, with 80% of seafood from fisheries and 20% from fishing.
- E-commerce penetration has increased as traditional barriers for selling fish and seafood online, such as poor consumer perceptions of freshness and transport difficulties, are being eroded. Local governments are helping producers establish e-commerce solutions to support the use of live streaming to directly communicate freshness to consumers. At the same time, logistics providers have developed mature systems for chilled seafood deliveries.

- Imported crab, particularly live king crab, remains a popular choice amongst consumers, with Russia being a key exporter. Consumers value live seafood as the highest level of freshness for luxury seafood. At the same time, the price of king crab has risen, demand remains largely unaffected, and thus imports are expected to grow.

- A rising middle class and growing disposable incomes allow consumers to trade up for higher quality and premium fish products, with claims such as organic and imported being perceived as healthier and more nutritious, yet with higher prices.

- Local seafood is generally consumed at home due to its freshness and affordability, while imported products are consumed at high-end hotels and restaurants. Plus, while live and fresh seafood is considered healthiest, improvements in production are expected to see frozen and processed seafood consumption rise.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
China	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	2,347.05	4.05
				2027	3,146.56	6.04
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	4,015.69	12.18
				2027	7,182.10	12.33
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	5,986.32	12.08
				2027	11,013.93	12.97
		Dried Fish & Seafood	Dried Fish & Seafood	2022	1,108.04	5.49
				2027	1,672.77	8.59
		Fresh Fish & Seafood (Counter)	Fish	2022	13,194.75	8.69
				2027	20,853.83	9.59
			Shellfish	2022	17,799.00	11.59
				2027	30,949.08	11.70
		Frozen Fish & Seafood	Frozen Processed Fish	2022	1,669.06	13.28
				2027	4,356.69	21.15
			Frozen Whole Cuts Of Fish & Seafood	2022	4,768.85	12.29
				2027	9,291.33	14.27

Source: GlobalData, 2024

ITC - Trade Data

Fresh or Chilled Atlantic Salmon in China

China - 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	736,711	49,018	26	1	-9
1	Norway	366,617	23,546	37	21	10
2	Australia	155,263	11,548	18	36	20
3	Chile	102,370	6,681	50	-27	-34
4	Area Nes	85,472	5,459	34	-8	-17
5	United Kingdom	17,799	1,135	-62	-13	-21
6	Iceland	5,428	375	-16	-	-18
7	Canada	2,848	199	14	-49	-53
8	The Netherlands	923	76	-	-	-
9	Sweden	-	-	-	-	-
10	Denmark	-	-	-	-	-

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	47=61	-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 China

China - 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	118,743	14,483	294	-6	-11
1	Chile	117,460	14,304	305	-6	-11
2	Norway	477	57	768	-11	-29
3	Iceland	403	51	-	-	-
4	Australia	401	67	-62	-	-
5	Russia	2	5	-	-	-
6	Hong Kong	-	-	-	-	-
7	Mongolia	-	-	-	-	-
8	Denmark	-	-	-	-	-
9	Poland	-	-	-	-	-
10	The Netherlands	-	-	-	-	-

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 Fillets of Pacific Salmon in China

China - 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	11,337	855	173	4	-4
1	Chile	7,110	503	134	16	8
2	Norway	3,951	276	373	50	54
3	Japan	188	22	151	47	45
4	Area Nes	39	26	-	-75	-30
5	Estonia	24	24	-	-	-
6	China	20	3	-	-57	-67
7	New Zealand	4	0	-97	-54	-
8	United States	-	-	-	-	-
9	Germany	-	-	-	-	-
10	Canada	-	-	-	-	-

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 China

China - 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	481,082	129,205	98	-6	-15
1	Russia	242,952	72,789	143	-13	-22
2	United States	209,139	50,782	63	5	-1
3	Chile	15,640	2,228	155	6	1
4	Japan	11,969	3,057	68	0	1
5	Canada	1,261	325	439	-25	-22
6	South Korea	20	24	-80	-	-
7	Vietnam	-	-	-	-	-
8	Germany	-	-	-	-	-
9	France	-	-	-	-	-
10	Spain	-	-	-	-	-

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 China

China - 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	71	2	-45	-45	-52
1	United Kingdom	45	1	-61	-29	-40
2	Germany	22	1	-	-	-
3	New Zealand	4	0	-	-	-
4	Canada	-	-	-	-	-
5	Japan	-	-	-	-	-
6	Hong Kong	-	-	-	-	-
7	Taiwan	-	-	-	-	-
8	Indonesia	-	-	-	-	-
9	Singapore	-	-	-	-	-
10	New Caledonia	-	-	-	-	-

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 China

China - Trade Data - HS Code 030219 Fresh or Chilled Salmonidae (Import):

<table>
<tr><th>Rank</th><th>Country</th><th>Imported Value (USD Thousand)</th><th>Quantity Imported (Tonnes)</th><th>Annual Growth in Imported Value % (Short-term '21 – '22)</th><th>Annual Growth in Imported Value % (Long-term '18 – '22)</th><th>Annual Growth in Imported Quantity % (Long-term '18 – '22)</th></tr>
<tr><td>-</td><td colspan="6" rowspan="11">NO DATA AVAILABLE</td></tr>
<tr><td>1</td></tr>
<tr><td>2</td></tr>
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<tr><td>10</td></tr>
</table>

AUS - Trade Data - HS Code 030219 Fresh or Chilled Salmonidae (Export):

<table>
<tr><th>Rank</th><th>Country</th><th>Exported Value (USD Thousand)</th><th>Quantity Exported (Tonnes)</th><th>Annual Growth in Exported Value % (Short-term '21 – '22)</th><th>Annual Growth in Exported Value % (Long-term '18 – '22)</th><th>Annual Growth in Exported Quantity % (Long-term '18 – '22)</th></tr>
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</table>

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Salmonidae in China

China - 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	61	65	-78	-66	-52
1	Russia	38	50	-10	-35	-17
2	Kazakhstan	23	15	-	-47	-17
3	South Korea	-	-	-	-	-
4	Mauritania	-	-	-	-	-
5	United States	-	-	-	-	-
6	Turkey	-	-	-	-	-
7	United Kingdom	-	-	-	-	-
8	India	-	-	-	-	-
9	Czech Republic	-	-	-	-	-
10	Australia	-	-	-	-	-

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	Thailalnd	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

Fresh or Chilled Fillets of Pacific Salmon in China

China - 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	7,362	438	239	111	101
1	Norway	7,310	435	272	261	194
2	Area Nes	31	2	-85	-27	-26
3	New Zealand	21	1	-	-39	-24
4	Chile	-	-	-	-	-
5	The Netherlands	-	-	-	-	-
6	Sweden	-	-	-	-	-
7	Poland	-	-	-	-	-
8	Denmark	-	-	-	-	-
9	Germany	-	-	-	-	-
10	United States	-	-	-	-	-

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 China

China - 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	8,622	473	-13	18	2
1	New Zealand	8,589	463	-13	20	15
2	Russia	32	10	58	-50	-57
3	Canada	-	-	-	-	-
4	United States	-	-	-	-	-
5	Chile	-	-	-	-	-
6	Belgium	-	-	-	-	-
7	France	-	-	-	-	-
8	Hong Kong	-	-	-	-	-
9	The Netherlands	-	-	-	-	-
10	United Kingdom	-	-	-	-	-

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

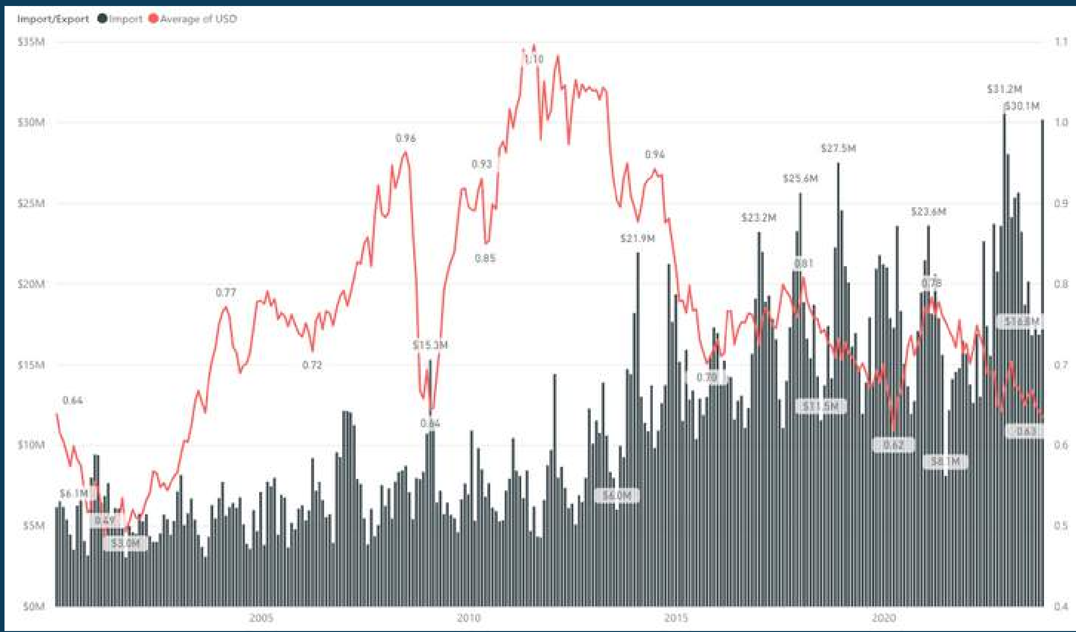
Export Value by State

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

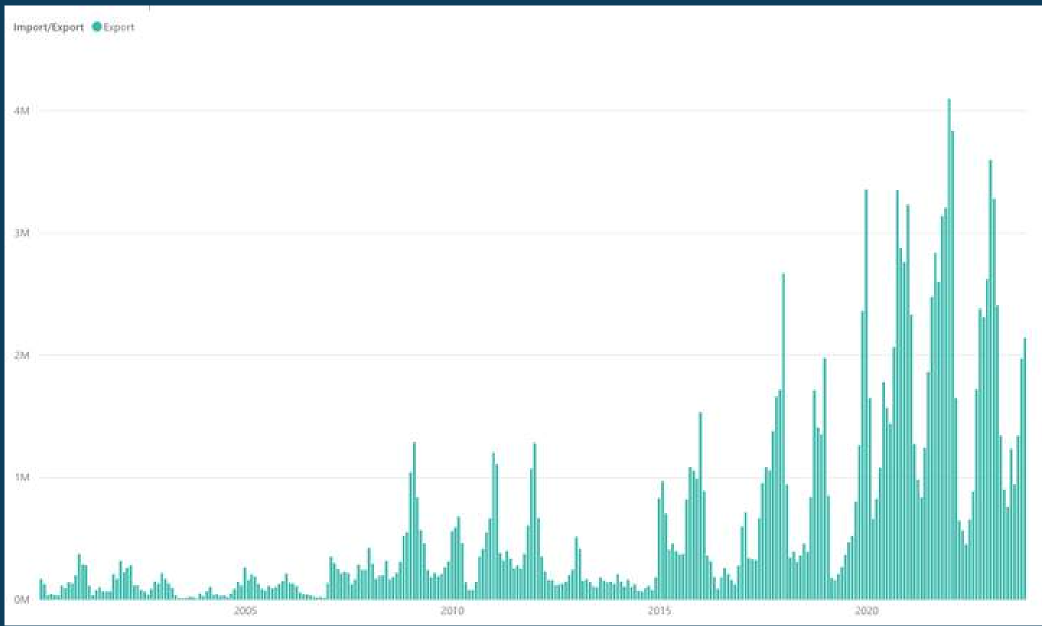
Import Value by State

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

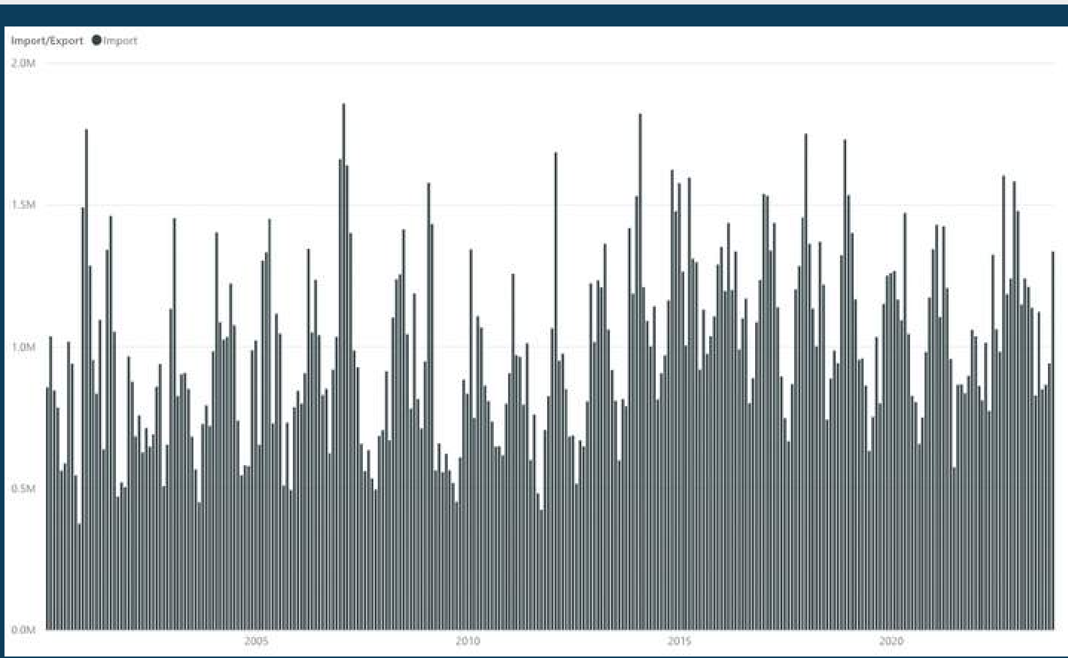
Export Volume by State

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 rhodrus) (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

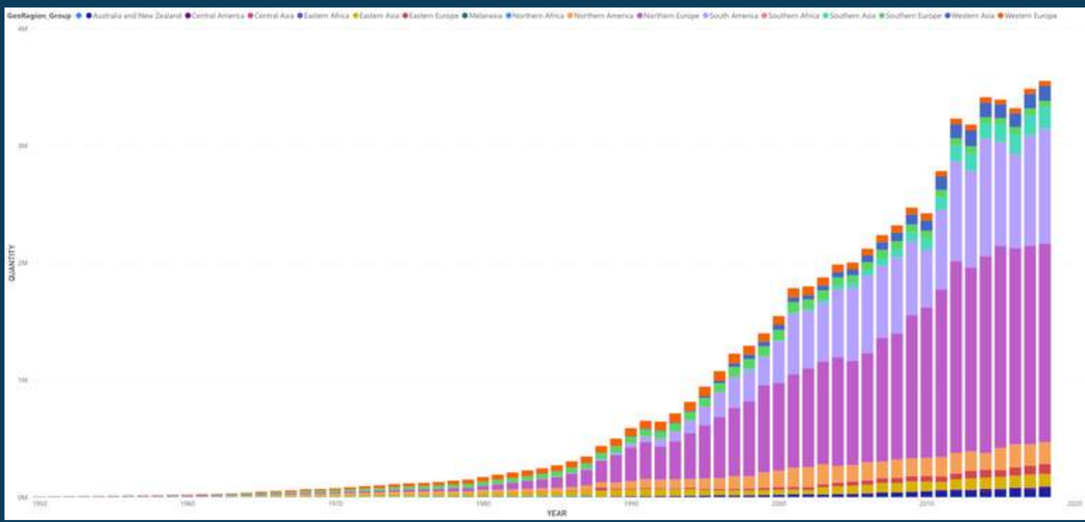
Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Salmon, Trouts, Smelts

ISSCAAP Group: Salmon, Trouts, Smelts

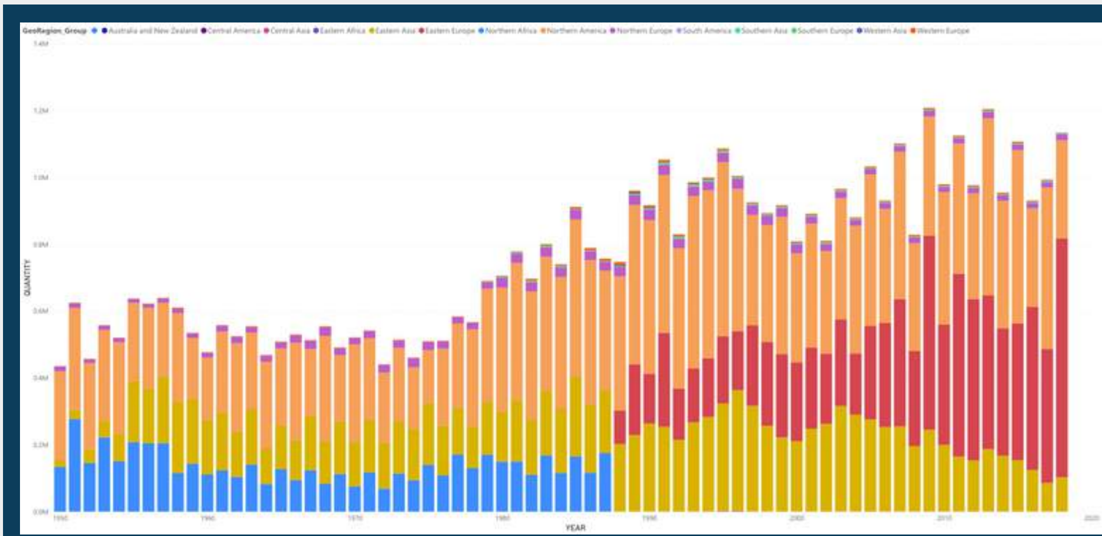
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	40 255	36 775	24 283
China	Tonnes – net product weight	215 118	232 348	345 101

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	433 651	332 336	251 977
China	Value (USD 1000)	1 387 640	1 193 080	1 782 617

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 - China Market Overview

Austrade - China Market Profile

DFAT - China Country Brief

DFAT - China Market Insights

Enterprise Singapore - China Market Profile

FoodExport - China Country Profile

HKTDC Research - China Market Profile

Santandar Trade Markets - China Market Overview

USDA - China Exporter Guide

CONSUMER INSIGHTS

Euromonitor International - Consumer Lifestyles in China

GWI - China Consumer Snapshot

Santandar Trade Markets - Reaching the Chinese Consumer

CATEGORY & CHANNEL INSIGHTS

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

Agriculture and Agri-Food Canada - China Foodservice Profile

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

Euromonitor International - China Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - China Foodservice Overview

USDA - China Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - China Investment Policy Hub

USDA - China Import Regulations & Standards

DFAT - ChAFTA

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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