Thailand 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): **$512.19 billion** as of November 2023.
- GDP Per Capita (USD): **$23,710** as of December 2023.
- Currency: **Thai Baht** (THB).
- Exchange Rate: **1 THB = 0.043 AUD** (01/02/24).
- Mercer's 2023 Quality of Living Ranking: Thailand's highest-ranking city is **Bangkok at 124**.
- Human Development Index: **0.800** and ranked **66th** as of 2021.
- Logistics Performance Index: **3.50** and ranked **34th** globally as of 2023.

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - Thailand is a part of 36 Bilateral Investment Treaties (BITs).
  - Thailand is also a part of the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA) and the Australia-Thailand FTA.
  - Additionally, Thailand is also a member of the Regional Comprehensive Economic Partnership (RCEP) with 14 other countries, including Australia. This was signed in 2020 but is not in force yet.

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

Demographic Indicators

- Total Population: Approximately **71.89 million** as of January 2024.
- Expatriate Population: Approximately **3.00 to 4.00 million** as of 2023 as per the Thailand Migration Report.
- Population Growth: **0.15%** as of 2023.
- Median Age: Approximately **40.20 years old**.
- Urban Population: **52.89%** as of 2022.
- **Population Ethnicity:**
  - 97.5% Thai
  - 1.3% Burmese
  - 1.2% Others (including Chinese, Cambodian)
- **Dominant Religious Groups:**
  - 94.5% Buddhist
  - 4.29% Muslim
  - 1.17% Christian
  - 0.04% Other

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

Consumer Behaviour & Societal Trends

Key Trends:

- The Thai food retail industry is rapidly growing, owing to Thailand's rising economic growth and an increase in its middle-income population that has increased levels of disposable income. With Thailand's increase in urbanisation, the food industry has become intrinsic to Thailand's economic growth and contributed 23% to the GDP in early 2020.

- The onset of the pandemic has brought about an increase in wellness products that strengthen the immune system and enhance the overall health of consumers. Consumers are also becoming more environmentally conscious and are gravitating towards sustainably produced food goods.

- Food delivery services have rapidly grown owing to an increase in demand due to lockdowns and movement restrictions. This growth is anticipated to continue as consumers become habituated to the convenience such delivery platforms offer.

- Nevertheless, dining out is a crucial part of Thailand's social culture, with most consumers viewing it as an event that offers sensory experiences that cannot be experienced through food delivered home.

- As reported by HKTDC Research, 81% of Thai consumers anticipate spending at the same current levels, or even more on dining out and meal deliveries over the next three years.

- While the pandemic in 2020 led to a decrease in consumer spending by -1.6%, this is predicted to recover in 2021, at a growth rate of 2.2% year on year. This will be additionally supported by government spending.

- Consumers are increasingly influenced by food quality, presentation, geolocation, and the overall experience when deciding where to dine out. The importance of price and availability has decreased, also aggravated by an increase in social media penetration.

- Thailand's adoption of the internet and social media has risen, and this trend is anticipated to continue to increase. Over the years leading to 2025, the Food & Beverages segment within the E-Commerce space in Thailand is expected to rise at a compounded annual growth rate of 10.46%, rising to a value of US$2.86bn.

Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

- Thai consumers spend approximately 9 hours and 6 minute daily online and about 2 hours 59 minutes is spent on social media sites and apps.
- As of January 2022, there were 54.50 million internet users in Thailand, across all devices with a penetration rate of 77.8%.
- As per the 'Digital 2022' report, there are 56.85 million Thai active social media users with a 81.2% penetration rate. This is a 3.4% increase compared to April 2021.
- Google is the most popular site with a monthly traffic of 310m visits. It is followed by Youtube with 144m visits and Facebook at 75.9m. Pantip.com gets about 50.9m monthly visits.

Source: Digital in 2022 Report

Grocery Retail Channel Developments

Key Trends:

- With the rise in the middle-income class in Thailand, supermarkets in the country continue to grow. This is also a result of the low unemployment levels in Thailand, as well as access to higher levels of disposable income and overall low-interest rates.

- To stand out from their competitors, supermarket chains in Thailand continue to innovate with physical stores offering features like in-store cooking services, dine in corners, ready to eat meals and a wide range of high-quality products.

- Tops Market continues to dominate the supermarket channel. It continues to hold onto its growing consumer base by offering membership programs, promotions and other innovative services. Other established brands such as Villa Market are also aggressively increasing the number of stores, and are expecting to launch 4-5 new outlets annually. This is in direct contrast to Foodland, a chain that is reducing its rate of expansion so that it can pay increased attention to its 'Took Lae Dee' chain of restaurants.

- Hypermarkets are performing the least positively of all the grocery retail channels. This is possibly due to the shift in Thai preference towards local neighbourhood stores that are more conveniently located, even if they cannot offer the same low prices as hypermarkets.

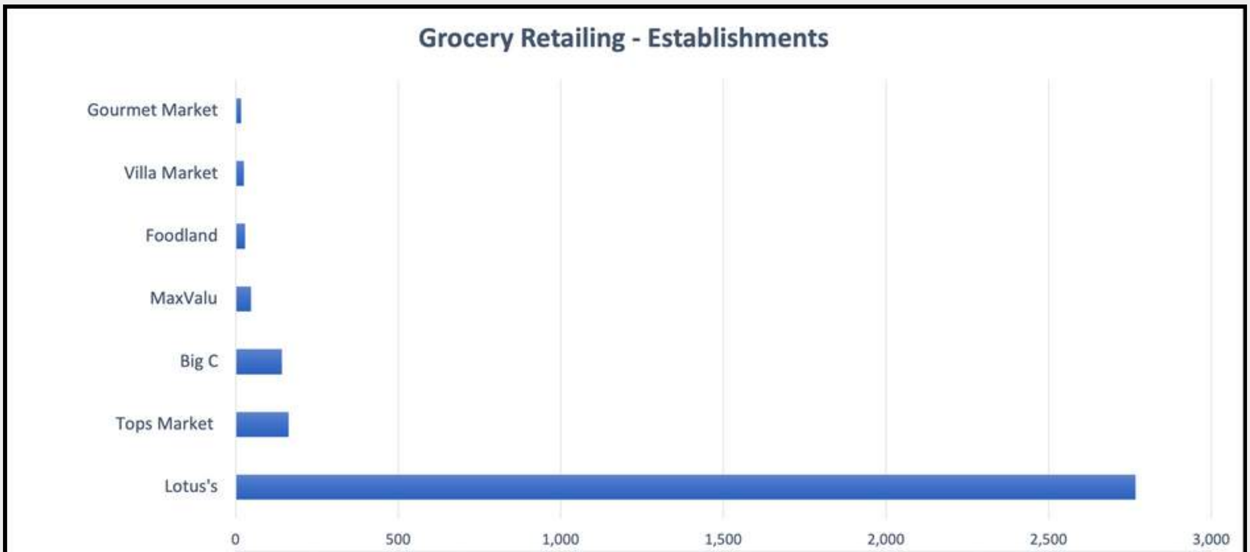
- Since there is a lowered importance of the price of the product in the mind of the Thai consumer when deciding on purchases, hypermarkets are trying to attract customers by offering initiatives such as in-store cafes and playgrounds for children.

- In a bid to increase customer visits to stores, hypermarkets are using the internet to implement a new 'O2O' operations model that links online and offline channels. This may also be considered a response to the increased internet and social media penetration rates within Thailand.

- Rapid urbanization and the growing number of time-poor consumers in Thailand has led to the swift expansion of the number of convenience stores in Thailand. With the increase in various services being offered, it is expected that this growth will rise even further over the coming years.

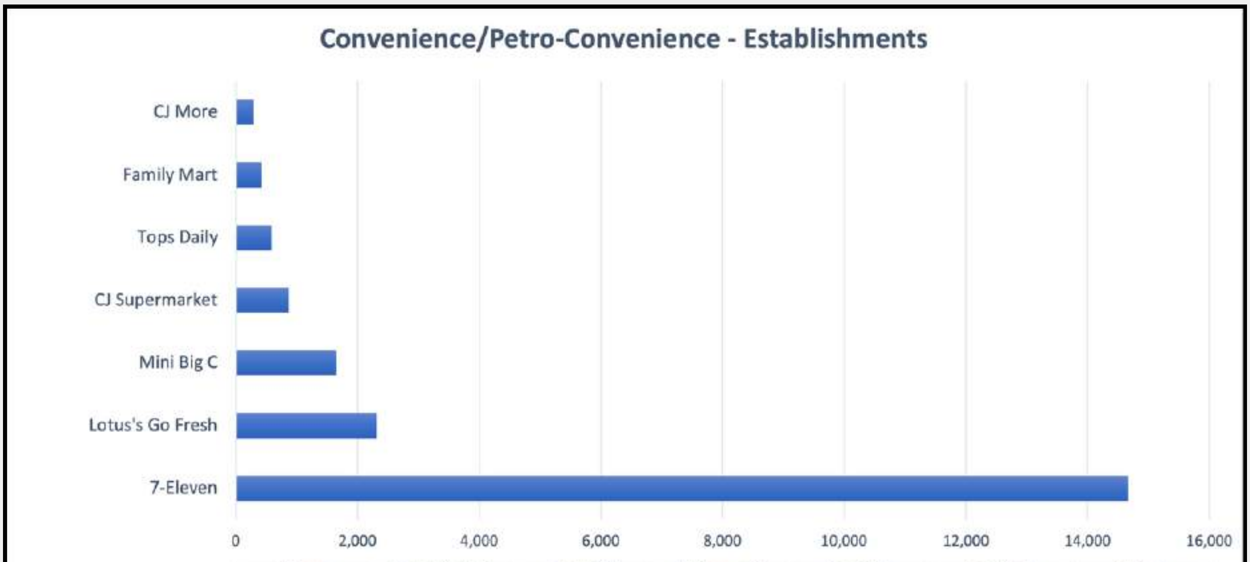
- The economic challenges resulting from efforts to curb the spread of COVID-19 are likely to endure through the forecast period and beyond 2025; as a result of this, the opportunities for supermarkets to develop their offerings beyond essential items are likely to be limited outside of upmarket operators. The key goal of these upmarket operations will be to appeal to the channel's relatively affluent consumer base liking to experience fresh produce, meat and fish from imported markets.

Grocery Retailing Brand Outlets:



	Lotus's	Tops Market	Big C	MaxValu	Foodland	Villa Market	Gourmet Market
Outlets	2,767	163	142	47	29	25	17

Convenience/Petro-Convenience Brand Outlets:



	7-Eleven	Lotus's Go Fresh	Mini Big C	CJ Supermarket	Tops Daily	Family Mart	CJ More
Outlets	14,670	2,310	1,651	866	590	431	294

Source: Euromonitor

Foodservice Channel Developments

Key Trends:

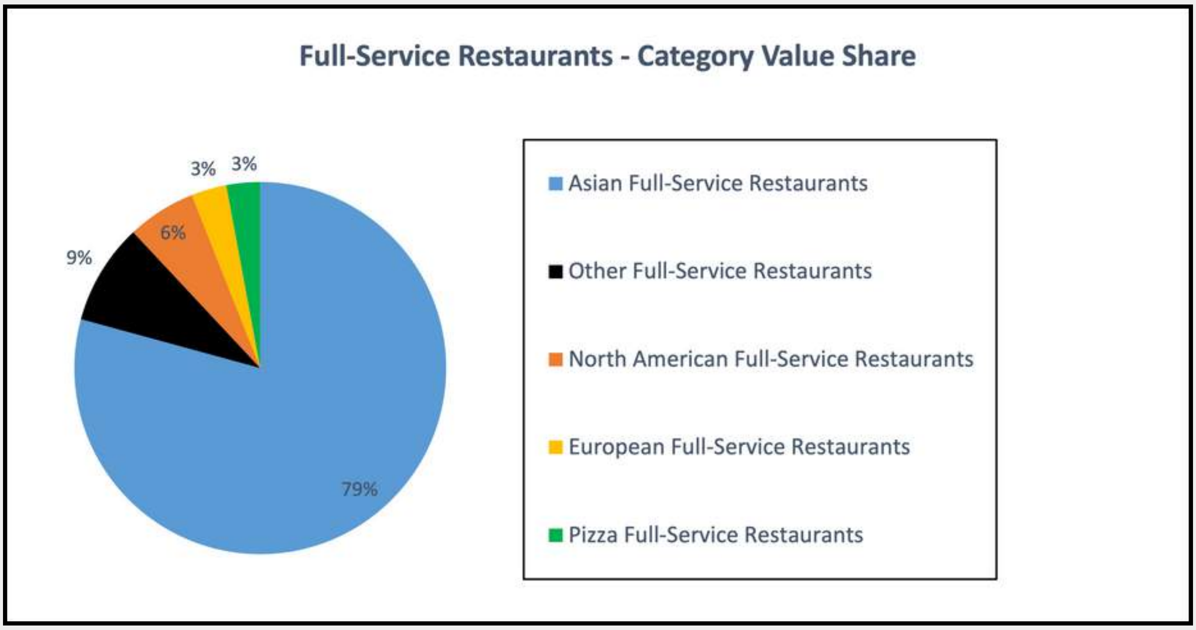
- Thailand is one of the major Southeast Asian countries to have a huge consumer food industry, with an important source of revenue for this industry being inbound tourists.
- Thus, due to the pandemic and restrictions on movement and international travel, revenue and sales for consumer foodservice outlets across Thailand has significantly dropped.
- Thailand's consumer foodservice industry is highly fragmented with multiple independent operators. To supplement dwindling sales during the lockdowns of 2020-21, many such operators began collaborating with third-party delivery companies to offer takeaways and food deliveries.
- Full-service restaurants also jumped onto the home delivery trend during the pandemic, with some establishments such as MK restaurants launching additional innovative ideas such as providing a free pot for hot pot orders.
- A large part of the Thai restaurant industry comprises full-service restaurants. The most popular global cuisine continues to be Japanese food, with Italian, Chinese, American, and Vietnamese following closely behind.
- In 2020, established full-service restaurant brands like Sizzler, S&P and Yoshinoya launched promotions, such as buy-one-get-one-free deals, predominantly aimed at customers who were working from home. Other restaurants launched menu options with increased health and wellness benefits.
- During the pandemic, limited-service outlets witnessed a drastic decrease in sales due to the complete ban on international travel. Due to the fall in inbound tourist numbers, most limited-service outlets had to tweak their menus to cater to local tastes and preferences.

- Consumer preferences have undergone a shift with the growing usage of social media and the internet, with most Thai customers wanting to share their experiences online. Most Thai consumers are now noted to place a lot of importance on the quality and presentation of the food while dining out.

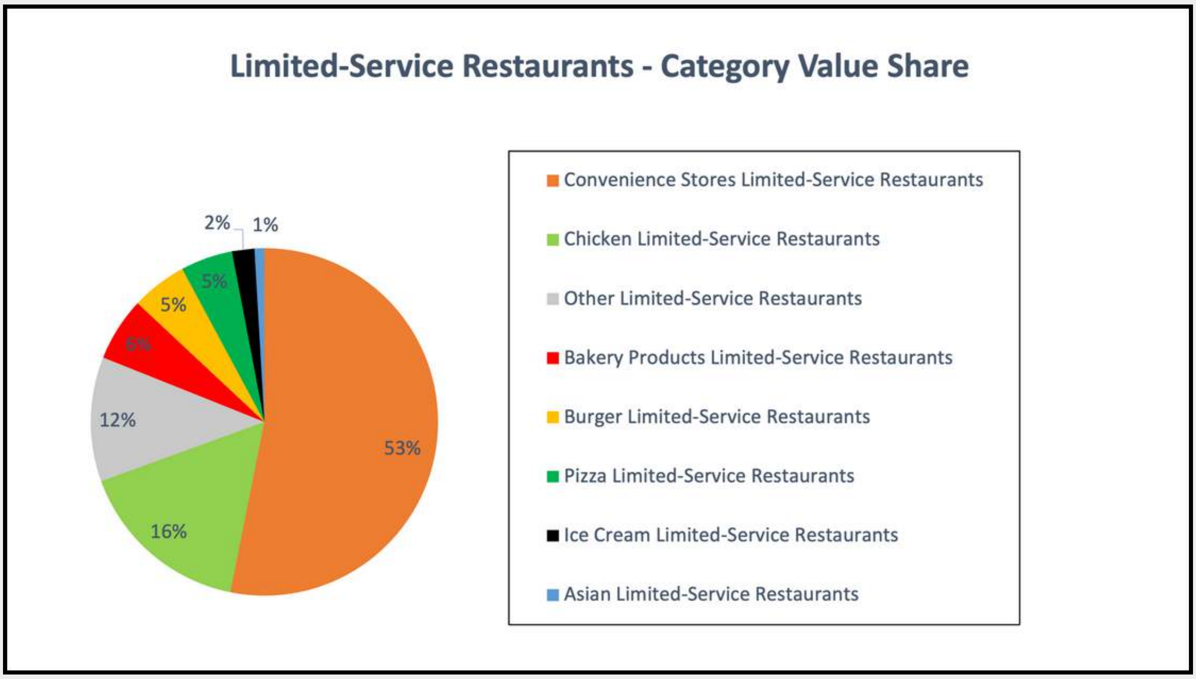
- A growing number of Thai consumers chose restaurants based on their research online done on their cellphones. Consequently, the physical location of the foodservice outlet is no longer as important as the outlet's presence on search engines and sites like Google Maps.

- The Thai foodservice sector is expected to grow at an overall compound annual growth rate of 4.19% over the next 5 years leading up to 2026

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Before the advent of the pandemic in Thailand, the food & drink e-commerce sector was growing slowly but steadily, as more retailers introduced their online presence and consumers became more trustworthy of the online shopping experience.
- Since the pandemic, online grocery retail has grown rapidly, with outlets launching online home delivery options in partnership with mobile delivery services. This was particularly done to lessen the impact of lockdowns and restrictions on store capacities.
- As reported by the FFTC Agricultural Policy Platform, about 41% of Thai consumers used a food delivery service during the height of the pandemic.
- Online food delivery services are growing significantly in Thailand. By the end of 2021, the online food delivery segment is forecasted to be valued at US$329m and is anticipated to reach US$455m by 2024, at a compound annual growth rate of 11.35%.
- In an effort to reduce wastage and ocean pollution, the Thai government banned single-use plastic bags at major retail stores in early 2020. Such policies have accelerated the rise of online grocery shopping while decreasing the desire to shop in-store.
- Traditionally, key players prioritized urban areas in Thailand, where consumers typically had greater purchasing power and were more likely to be tech-savvy. However, more players are shifting their focus to relatively untapped, secondary locations.
- To attract more customers, multiple retailers are focusing on out-of-the-box initiatives in collaboration with mobile delivery service platforms, such as Central Food Retail’s partnership with GrabFood to introduce a promotion for customers on Valentine’s Day.
- As reported by the Electronics Transactions Development Agency, Thai Generation Y consumers are the main drivers of online delivery services, accounting for more than 50% of all transactions.

- Even as Thai consumers continue to prefer convenience stores for their purchases, online platforms have witnessed notable growth, predominantly due to the increase in spending by the middle-income consumer group. As per the FFTC Agricultural Policy Platform, there was a 90% increase in sales of e-commerce brands.

Key E-tailers:

- The predominant online grocery platforms in Thailand are Honest Bee, Happy Fresh, Delishop, Big C, Tesco Lotus, and Tops.

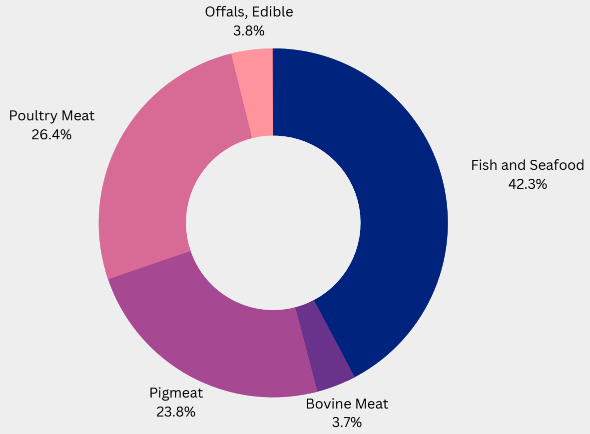
- In Thailand, the four main online food delivery platforms include Line Man, GrabFood, Get and FoodPanda. More than 80 percent of all online food orders in Thailand are processed through such food delivery applications.

Source: Euromonitor

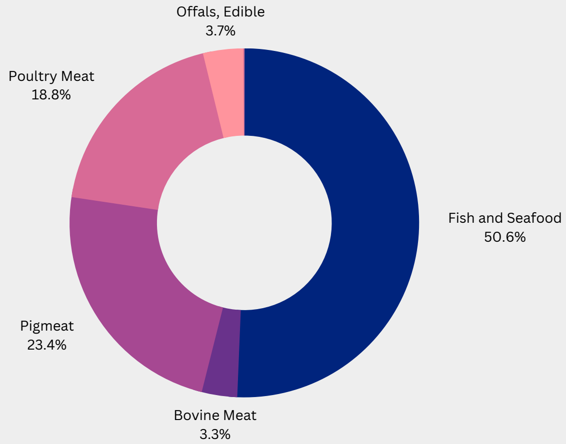
Seafood Consumption in Thailand

- Fish and seafood supply per person in Thailand is valued at 29.35 kg as of 2019 according to the United Nations Food and Agricultural Organization (FAO). This value has risen by 4.33% annually between 2014 - 2019, having been previously recorded as 23.74 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: 1.90 kg
  - Mutton & Goat Meat: 0.05 kg
  - Pigmeat: 13.58 kg
  - Poultry Meat: 10.91 kg
  - Meat, Other: 0.01 kg
  - Offals, Edible: 2.15 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:

- Food & Drug Administration (FDA): This department works as part of the Thai Government's Ministry of Health. Its main responsibility is to manage the compulsory registration process of all imported pharmaceuticals, food, supplements or other drug-related substances into Thailand.
- Department of Foreign Trade: Working under the Thai government's Ministry of Commerce, this department manages the administration of affairs relating to international trade, including regulation in Thailand.
- Customs Department: Also known as 'Thai Customs', this department works under the Ministry of Finance. Its main responsibility is to facilitate the customs clearing process of all imports and exports in and out of Thailand.

Product Registration/Import Procedure:

- All imported products must be first reported to the Thai Customs Department.
- As per DAWE's Micor guide, export registration is required to sell fish and seafood in Thailand. However, an establishment listed is not required.
- Using a 'digital certificate', an electronic signature file that confirms the identity and authenticity of the sender's documents, it is mandatory for importers to register for the Thai e-customs system. It is imperative that the importer checks if the goods need an import permit.
- The general customs clearing procedure for imports includes submitting a customs import entry form, along with other relevant documentation. This includes a commercial invoice, packing list, bill of lading, and letter of credit.
- After this documentation is assembled, an import declaration may be submitted to the e-customs system with an arrival report.

Documentation Required:

- The following documents are generally required to facilitate the import process:
    - Import declaration
    - Packing list
    - Bill of Lading or Air Waybill
    - Commercial invoice
    - Import license from the FDA and other relevant documentation for certain goods

General Labelling Requirements:

- In general, food labels must include:
  - Product name
  - Registration number
  - Main ingredients
  - Name and address of manufacturer
  - Name and address of the importer
  - Date of manufacture and expiration
  - Net weight and volume
  - Name of all food additives
  - Health and nutritional claims if any

Packaging Requirements:

- The outer and inner packaging must be resistant to moisture so that product quality can be preserved.
- Any container used is required to be clean and contamination-free. It must not emit any food-contaminating colours or contain any heavy metals, or other harmful substances.

Non-Tariff Barriers:

- Under the World Trade Organization (WTO) Agreement in Agriculture, Thailand may levy tariff rate quotas for multiple agricultural products, including skim milk, milk and cream, and flavoured milk. For Australian importers, this barrier is expected to be terminated by the year 2025.

Tariffs Levied:

- Under the AANZFTA, the Thai government does not levy tariffs on most Australian imports.

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

Category Data

Fish and Seafood in Thailand

Key Trends:

- Total volume sales fell 9% in 2021. While fish and seafood sales were impacted due to the tourism industry contraction, lockdowns and reduced purchasing power, foodservice experienced a stronger volume decline, shifting the demand balance in the favour of retail outlets and thereby reversing pre-COVID-19 trends. As such, value sales through retail channels experienced a boost over the review period across most fish and seafood variants.

- Wet market closures due to COVID-19 clusters contributed to retail volume sales declines as the wholesale market is Thailand's epicentre of seafood distribution.

- Pre-COVID-19, rising disposable incomes were driving demand for premium and sophisticated imported products including lobster, blue-fin tuna, king crab and abalone. COVID-19 however slowed seafood imports, with recovery not expected until 2025.

- The rise of busy urban consumers, especially amongst younger generations, means consumers prefer convenient food that requires less preparation, including processed, washed, frozen ready-to-cook and pre-cut products. Manufacturers are increasingly supplying more convenient products as a way to add value and charge higher prices.

- The market is highly competitive. Only dominant players including Charoen Pokphand Group and Thai Union Frozen Products are able to maintain sales due to their global presence and diversified products. Smaller players are being acquired or are shifting their focus to wet markets and e-commerce.

- In 2019, fish was the largest contributor to market growth and value sales, driven by the expansion in fish farming and government support. However, in 2021, crustaceans were the best performing category.

- Fish and seafood are perceived as healthy, low fat, low cholesterol, high protein and rich in vitamins and minerals, while being a source of omega-3 fatty acids. As health consciousness rises, consumption of fish and seafood products is likely to grow.

- Price remains a barrier to fish and seafood consumption, with a higher price than meat products. Consumers are more price-sensitive regarding consuming premium seafood products, especially since they are not the major ingredients for many Thai dishes. Salmon and tuna sales have started to recover from COVID-19, yet at a slow pace, due to reduced incomes.

- The Pacific white shrimp is the most popular shrimp among producers for both domestic sale and export. The government's campaign to help shrimp farmers during COVID-19 was introduced to support producers and stabilise consumption, thereby enabling crustaceans to slightly outperform other categories, especially in the foodservice channel. Higher volume sales for crustaceans are expected into the forecast period as consumers return to restaurants and economic growth returns.

- Total volume sales are expected to reach a CAGR of 5% to 2026 according to Euromonitor, with the category expected to recover to pre-pandemic levels in 2025. Price growth will also be restrained at the start of the forecast period with premium seafoods not being a major ingredient for Thai cuisine and consumers remaining price-sensitive.

- Salmon and tuna are among the most popular seafood products, and both have started to recover as Thailand reopens its borders, however, recovery is occurring at a relatively slow pace.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
Thailand	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	244.01	2.44
				2027	293.89	3.79
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	693.46	3.45
				2027	913.70	5.67
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	454.92	7.54
				2027	582.63	5.07
		Dried Fish & Seafood	Dried Fish & Seafood	2022	163.79	3.88
				2027	225.28	6.58
		Fresh Fish & Seafood (Counter)	Fish	2022	815.66	4.01
				2027	982.58	3.79
			Shellfish	2022	1,857.85	8.66
				2027	2,399.93	5.25
		Frozen Fish & Seafood	Frozen Processed Fish	2022	72.55	6.31
				2027	109.32	8.54
			Frozen Whole Cuts Of Fish & Seafood	2022	230.95	7.65
				2027	292.77	4.86

Source: GlobalData, 2024

ITC - Trade Data

Fresh or Chilled Atlantic Salmon in Thailand

Thailand - 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	206,434	17,976	7	23	18
1	Norway	197,282	17,151	20	21	16
2	Australia	8,228	754	-70	129	130
3	Denmark	620	49	-10	-	67
4	The Netherlands	145	12	39	382	-
5	France	85	4	127	-18	-18
6	Iceland	35	4	-	-	-
7	Canada	27	2	-	-69	-53
8	United Kingdom	12	1	-68	-62	-62
9	Cambodia	-	-	-	-	-
10	Bangladesh	-	-	-	-	-

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 Vietnam

Vietnam - 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	91,587	11,739	35	5	3
1	Chile	76,569	9,905	79	1	-2
2	Norway	14,895	1,817	114	8	6
3	Canada	123	18	-	-	-
4	Taiwan	-	-	-	-	-
5	Malaysia	-	-	-	-	-
6	Bangladesh	-	-	-	-	-
7	Cambodia	-	-	-	-	-
8	Laos	-	-	-	-	-
9	Nepal	-	-	-	-	-
10	Denmark	-	-	-	-	-

AUS - Trade Data - HS Code 030313 Frozen Atlantic Salmon (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	1,594	247	-61	39	-9
1	Vietnam	527	109	-5	117	32
2	Indonesia	516	56	-37	-	-
3	Hong Kong	215	15	62	19	28
4	New Zealand	128	9	-	-24	32
5	The Philippines	86	2	-62	130	-36
6	Papua New Guinea	60	10	-27	1	-37
7	Bangladesh	30	30	-36	-	-
8	Japan	19	2	-	-	-
9	Italy	5	1	26	-	-
10	Vanuatu	4	3	11	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Salmonidae in Thailand

Thailand - 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)
-	NO DATA AVAILABLE					
1						
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AUS - Trade Data - HS Code 030319 Frozen Salmonidae (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	1,209	47	19	35	20
1	Hong Kong	581	4	605	9	-34
2	Malaysia	481	34	-11	857	-
3	Thaialnd	92	5	-	-	-
4	Papua New Guinea	29	1	-90	31	30
5	Vietnam	10	1	-81	0	-33
6	Singapore	10	0	-	-	-
7	Solomon Islands	3	0	-	-	-
8	Japan	3	0	-	-	-
9	Saudi Arabia	-	-	-	-	-
10	Egypt	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Fillets of Pacific Salmon in Thailand

Thailand - 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	16,130	2,812	52	-5	5
1	Norway	6,749	1,043	52	-6	3
2	Chile	5,986	496	189	-14	-13
3	United Kingdom	1,081	572	-2	36	30
4	Poland	664	60	47	12	-3
5	The Netherlands	579	291	246	-	14
6	France	250	141	472	290	82
7	Sweden	167	9	15	18	10
8	Vietnam	121	18	460	3	21
9	China	97	50	-58	-7	15
10	Japan	96	16	1,557	-48	-49

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 Thailand

Thailand - 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	123,765	29,313	55	6	6
1	United States	72,140	17,690	61	18	16
2	Chile	22,692	3,346	90	-2	2
3	Russia	18,111	5,825	13	-8	-5
4	Japan	10,717	2,432	58	0	3
5	Canada	105	20	-62	-	-
6	South Korea	-	-	-	-	-
7	France	-	-	-	-	-
8	Spain	-	-	-	-	-
9	The Netherlands	-	-	-	-	-
10	Portugal	-	-	-	-	-

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 Thailand

Thailand - 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	204	5	-30	-47	-59
1	Australia	107	2	4	1	-8
2	The Netherlands	52	2	-24	-	23
3	France	20	0	-79	14	-
4	Norway	18	1	134	-67	-57
5	Poland	7	0	108	-20	-
6	Japan	-	-	-	-	-
7	Hong Kong	-	-	-	-	-
8	Bangladesh	-	-	-	-	-
9	Lithuania	-	-	-	-	-
10	Germany	-	-	-	-	-

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 Thailand

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

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-	NO DATA AVAILABLE					
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

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

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-	NO DATA AVAILABLE					
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Fillets of Pacific Salmon in Thailand

Thailand - 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	10,703	586	-9	13	10
1	Norway	5,839	338	-46	0	-2
2	The Netherlands	4,720	239	479	371	308
3	Vietnam	74	5	-	-	-
4	Australia	35	2	582	-42	-20
5	Japan	19	2	146	34	-
6	New Zealand	13	1	-	98	-
7	France	3	0	-	-49	-
8	Bangladesh	-	-	-	-	-
9	Laos	-	-	-	-	-
10	Chile	-	-	-	-	-

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 Thailand

Thailand - Trade Data - HS Code 030213 Fresh or Chilled Pacific Salmon (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	1,963	118	25	11	6
1	New Zealand	1,740	93	14	14	10
2	Japan	120	4	165	1	4
3	United States	103	22	9,772	41	-
4	Laos	-	-	-	-	-
5	Bangladesh	-	-	-	-	-
6	Canada	-	-	-	-	-
7	Chile	-	-	-	-	-
8	Belgium	-	-	-	-	-
9	France	-	-	-	-	-
10	Hong Kong	-	-	-	-	-

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

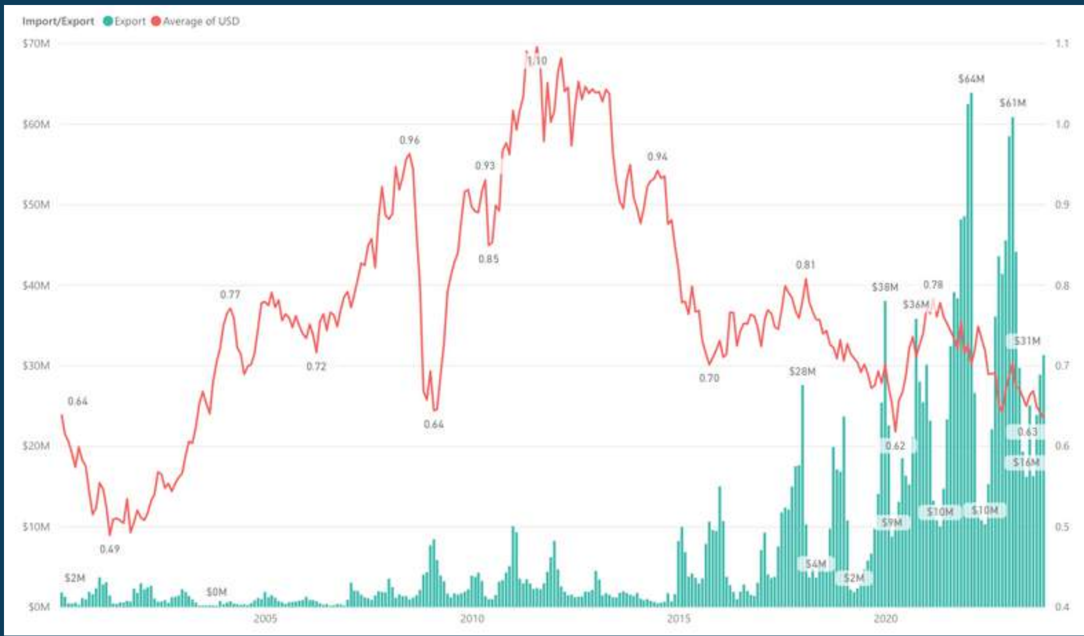
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	1	0	-93	-76	-
1	Christmas Island	1	0	-	-	-
2	New Zealand	-	-	-	-	-
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 <u>(Exports):</u>



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 rhodurus), 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

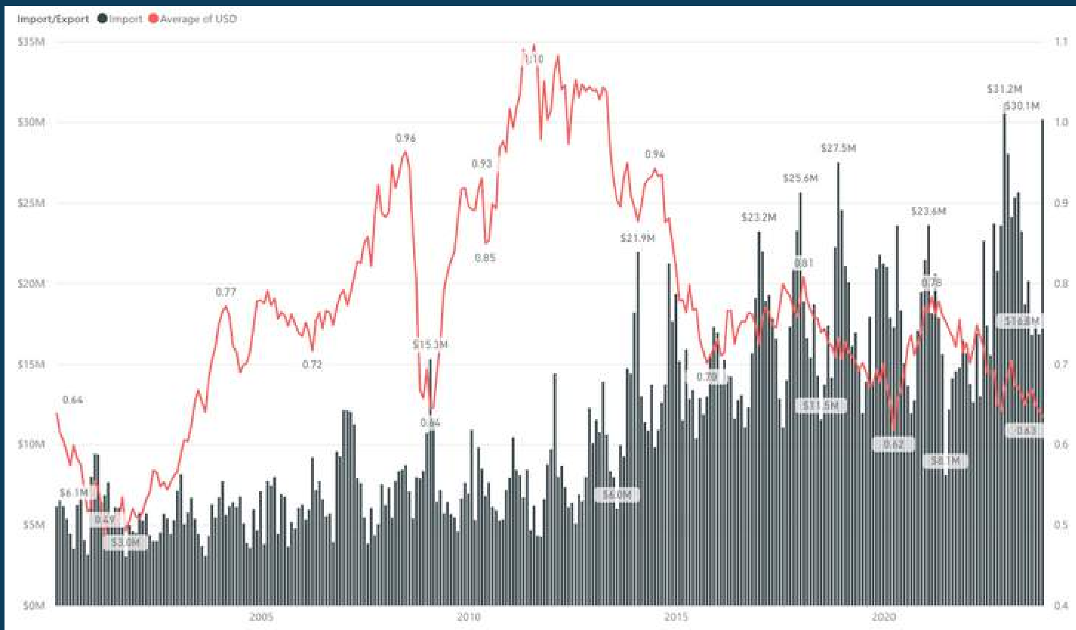
Export Value by State

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

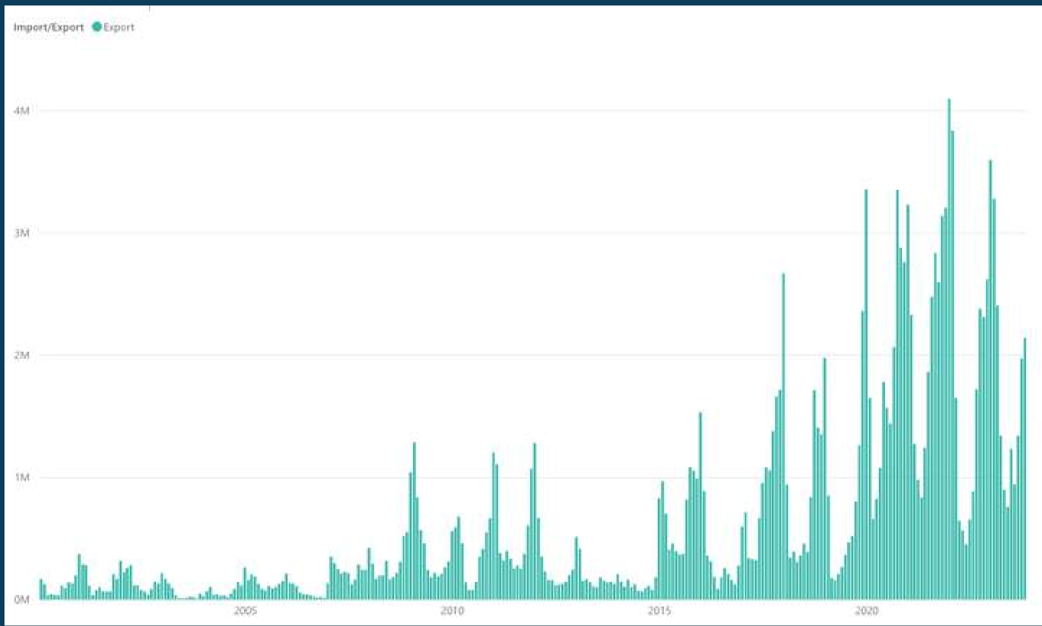
Import Value by State

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

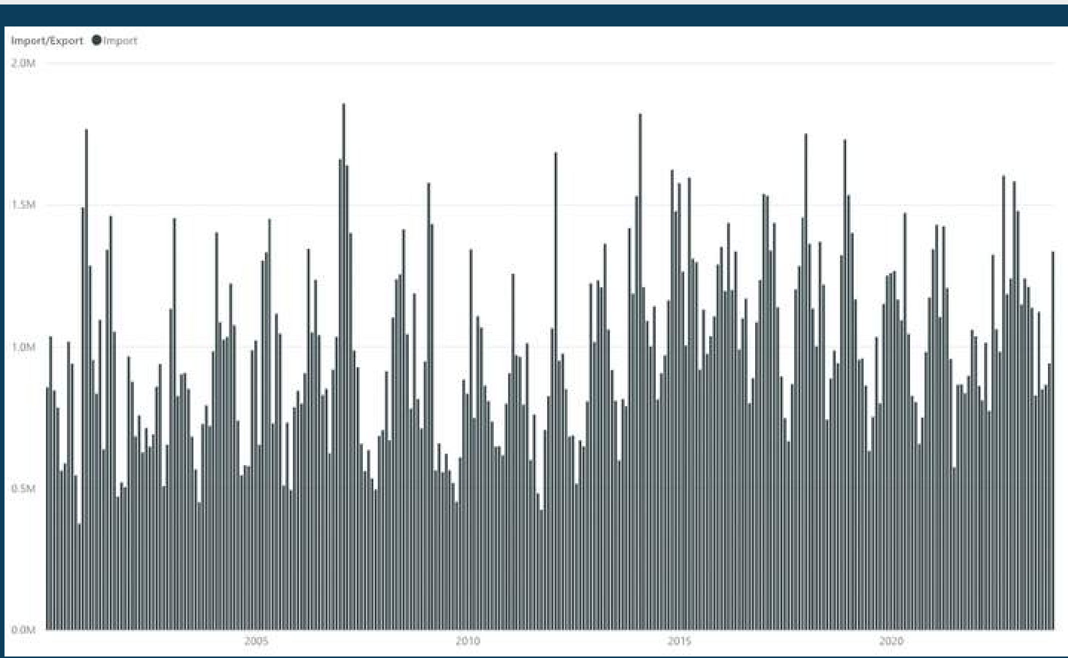
Export Volume by State

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

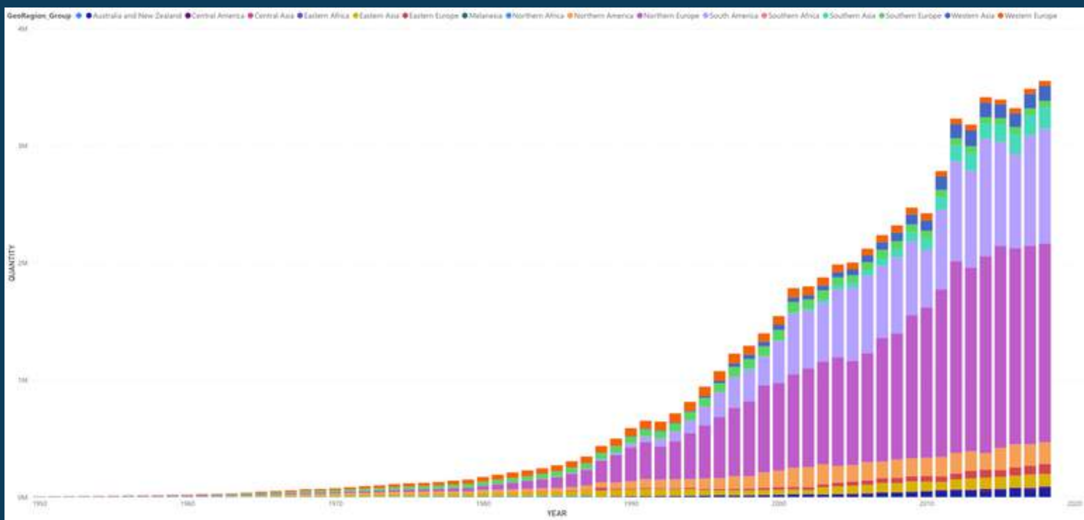
Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Salmon, Trouts, Smelts

ISSCAAP Group: Salmon, Trouts, Smelts

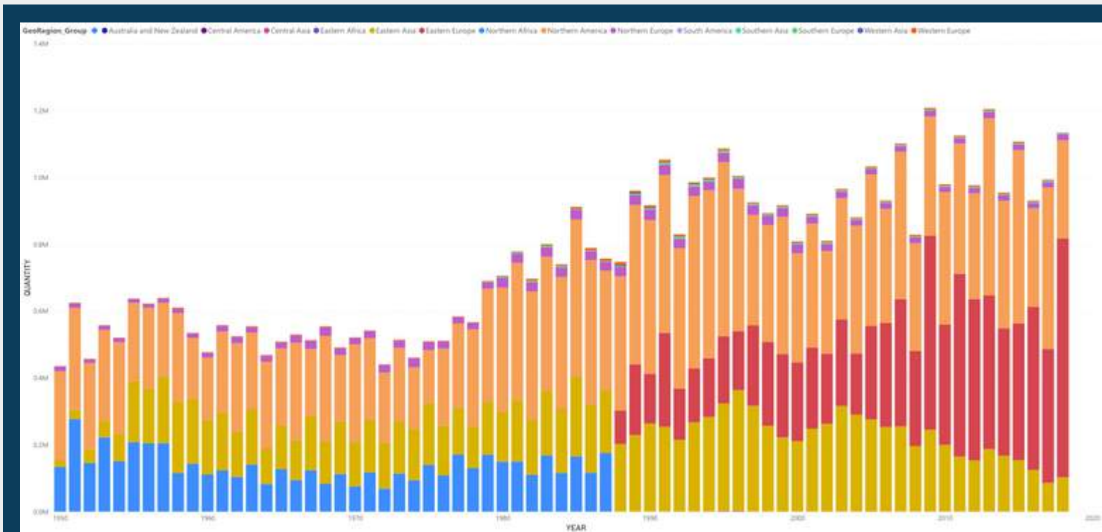
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	40 255	36 775	24 283
Thailand	Tonnes – net product weight	91 659	85 490	82 226

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	433 651	332 336	251 977
Thailand	Value (USD 1000)	626 210	527 692	575 969

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

Austrade - Thailand Market Profile

DFAT - Thailand Country Brief

DFAT - Thailand Market Insights

EC Europa - The Food and Beverage Market Entry Handbook: Thailand

Enterprise Singapore - Thailand Market Profile

FoodExport - Thailand Country Profile

HKTDC Research - Thailand Market Profile

Santandar Trade Markets - Thailand Market Overview

USDA - Thailand Exporter Guide

CONSUMER INSIGHTS

Euromonitor International - Consumer Lifestyles in Thailand

GWI - APAC Consumer Snapshot

Santandar Trade Markets - Reaching the Thai Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Thailand Foodservice Profile

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

Euromonitor International - Thailand Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - Thailand Foodservice Overview

USDA - Thailand Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - Thailand Investment Policy Hub

USDA - Thailand Import Regulations & Standards

DFAT - TAFTA

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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