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

January 2024

Seafood Industry Australia
The Voice of Australian Seafood

GREAT AUSTRALIAN SEAFOOD

About Seafood Industry Australia

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

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

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

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

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

Agricultural Trade and Market Access Cooperation (ATMAC) Program

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

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

Economic Indicators

- GDP (USD): **$426.00 billion** as of December 2023.
- GDP Per Capita (USD): **$15,320** as of December 2023.
- Currency: **Vietnamese Dong** (VND).
- Exchange Rate: **1 VND = 0.000063 AUD** (01/02/24).
- Mercer's 2023 Quality of Living Ranking: Vietnam's highest-ranking city is **Ho Chi Minh City at 162**, followed by **Hanoi at 167**.
- Human Development Index: **0.703** and ranked **115th** as of 2021.
- Logistics Performance Index: **3.30** and ranked **43rd** globally as of 2023.

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
    - Vietnam currently has 50 Bilateral Investment Treaties (BITs) and 19 Treaties with International Provisions (TIPs) in force.
    - Vietnam is also a party to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and ASEAN-Australian-New Zealand Free Trade Agreement (AANZFTA) that includes Australia and grants preferential treatment for Australian exporters.

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

Demographic Indicators

- Total Population: Approximately **101.31 million** as of January 2024.
- Expatriate Population: Approximately **101,550** as of 2022 as per the Ministry of Labour.
- Population Growth: **0.68%** as of 2023.
- Median Age: Approximately **32.70 years old**.
- Urban Population: **37.3%** as of 2022.
- **Population Ethnicity:**
  - 85.32% Kinh
  - 10.87% Others (including Murong, Mong, Khmer)
  - 1.92% Tay
  - 1.89% Thai
- **Dominant Religious Groups:**
  - 86.32% Non-religious
  - 6.1% Catholic
  - 4.79% Buddhist
  - 2.79% Other (including Protestant, Hoahoaism)

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

Consumer Behaviour & Societal Trends

Key Trends:

- Vietnam consistently recorded high GDP growth figures prior to the COVID-19 pandemic at around 7% annually in 2018 and 2019. Vietnam has experienced much fewer COVID-19 infections relative to other Asia-Pacific nations, causing consumer sentiment to hold firm and the country to consequently deliver positive growth figures in 2020-21.
- Vietnam is becoming more consumerist with a middle class that is forecasted to increase in size by 9.2% over 2018-2023 due to rising disposable incomes, a growing urban population that will reach approximately 55% of the population in 2030 and a consistently growing population.
- Vietnamese consumers are the most environmentally conscious in South-East Asia, with up to 86% of the population surveyed willing to pay more for products with a sustainable background, this phenomenon being most present amongst Generation Z.
- The Vietnamese desire for improved purchasing experiences trumps that for special promotions and is most profound for purchases of fresh food, education and dining out.
- Hyperlocal businesses such as convenience stores are increasing greatly in frequency across the Vietnamese market - proportionate to a shift in consumer preferences, where approximately 76% choose to shop somewhere because of its proximity to home.
- Digital wallet applications are attracting more and more users who desire the convenient nature of payments enabled by these fintech creations, using them for approximately one-fifth of all payments through e-Commerce platforms. This market is dominated by five major firms; SenPay, Payoo, Momo, Moca and AirPay.

- Vietnamese consumers prioritise brand trust and product quality when shopping, even whilst reducing discretionary spending due to the financial uncertainty created by the COVID-19 pandemic. They are also increasing their share of purchases that go towards organic products and/or other goods that have special health and wellness claims. With urbanisation comes more time-poor consumers due to lengthy work commutes worsened by bad traffic jams across Vietnam, fuelling a desire for more convenient shopping experiences.

- The greatest growth for products in the Food & Beverage sector before the COVID-19 pandemic came from impulse purchases of items such as biscuits and pies made by on-the-go shoppers, signalling future growth prospects post-pandemic.

- The proportion of consumers who buy new products is much higher relative to other SEA nations, with about 88% of surveyed consumers in Vietnam reporting having purchased a new product during their last shop.

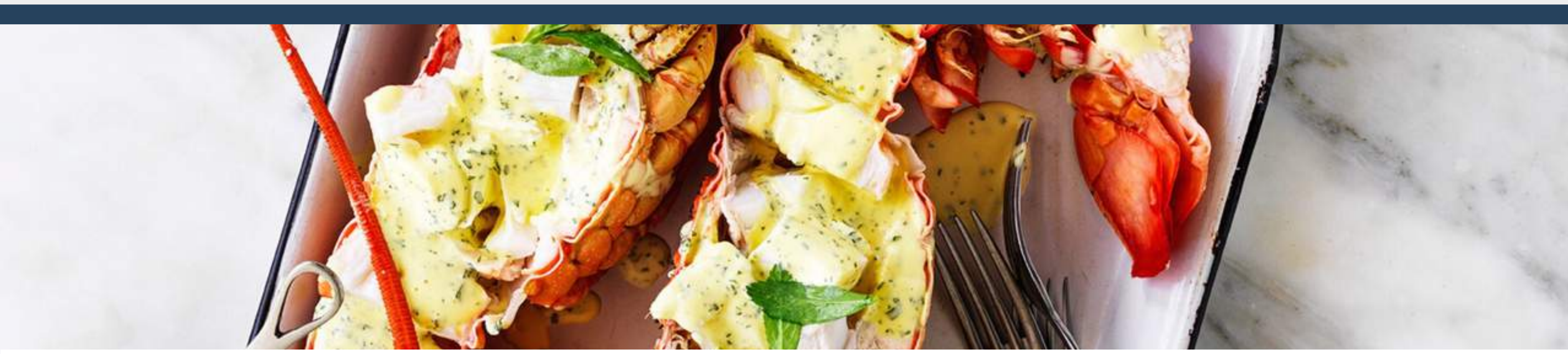
Source: Nielsen, Mintel, McKinsey, USDA

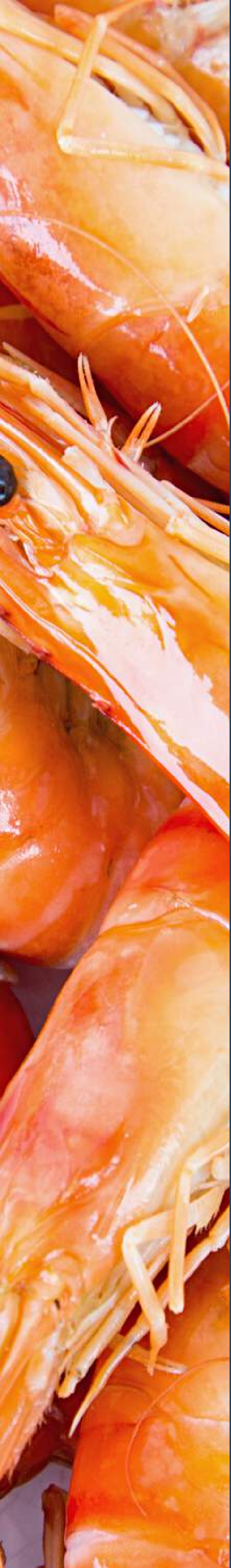
Digital Adoption:

- As of January 2022, there were 72.10 million internet users in Vietnam with a penetration rate of 73.2%, growing 4.9% from the same time in 2021.

- Vietnamese internet users, on average, spend 6 hours and 38 minutes daily on the internet. Whereas, approximately 2 hours and 28 minutes a day is spent using social media services.

Source: Digital in 2022 Report





Grocery Retail Channel Developments

Key Trends:

- Spending on groceries is very high in Vietnam as a portion of household expenditure relative to the rest of the world, forecast at approximately 42% of a Vietnamese person's monthly purchases in 2020, an increase of 8% from 2019. However, grocery spending as a whole remained stable throughout this time period as the value of household expenditure declined YoY.

- COVID has had a negative impact on Vietnamese supermarkets in 2020-21; the national lockdown did lead to stockpiling across many Vietnamese households, however, the financial uncertainty following the health crises meant that value sales growth across grocery retailing was largely constrained.

- The majority of Vietnamese consumers prefer to shop at traditional outlets such as wet markets and small, independent "tap hoa" stores, however, desires are increasingly shifting towards convenience stores, which have more than quadrupled in store numbers since 2012 and are forecast to compromise 37.4% of retail revenue in 2021.

- GS25, a major South Korean convenience store operator, began opening stores in Vietnam in 2018 and aims, by the end of the next decade, to operate 2,500 stores nationwide. This coincided with 7-Eleven's arrival and subsequent declaration that the global retailer aims to open 100 stores in three years.

- The Ministry of Trade and Industry believes 1-3 modern retail stores are necessary for every 1000 Vietnamese people, indicating a shortage that is quickly being filled by new hypermarkets, large supermarkets and convenience stores. Many major supermarket retailers, such as Saigon Union, receive extensive government assistance when expanding throughout both urban and rural areas.

- Supermarkets and convenience stores are taking advantage of the rising demands for convenient eating, providing many ready-to-eat (RTE) meals and semi-cooked meals that greatly reduce the effort involved in cooking at home.

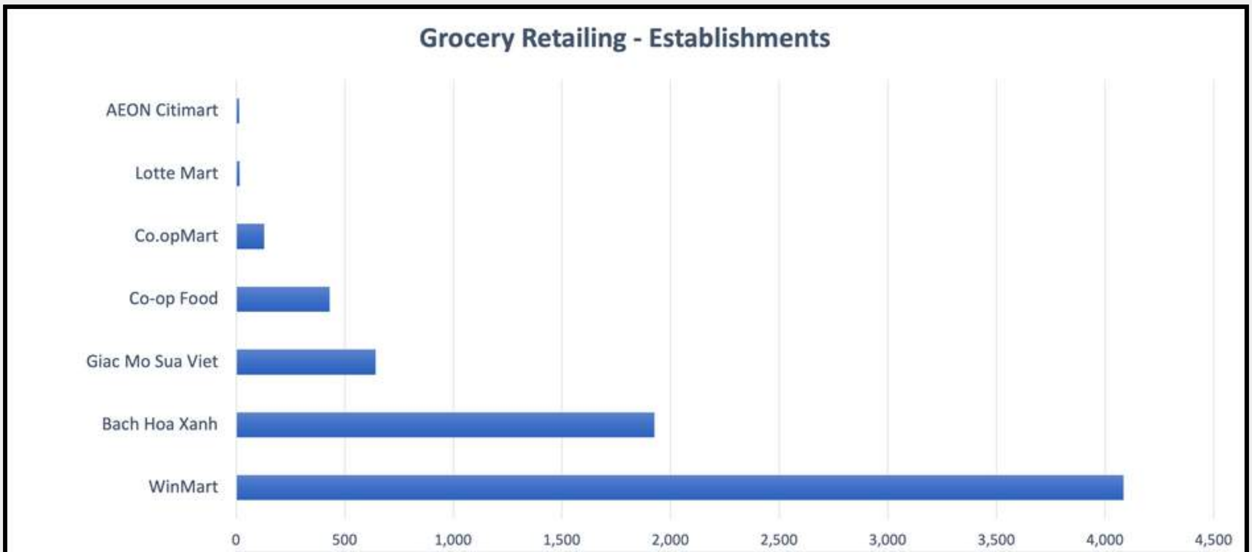
- Major chain hypermarket retailers saw positive growth in sales value throughout 2020 due to the expansion of a strategy of opening new stores in smaller towns where competition is weaker.

- Traditional grocery retailers are most dominant in rural areas, where the majority of Vietnamese still live as of 2021, and comprise a very crowded market of products.

- Masan recently acquired VinMart supermarkets, along with VinMart+ convenience stores from Vingroup and has closed hundreds of convenience stores in order to cover losses sustained throughout 2020. The owners hope to rebrand their purchases eventually to WinMart and begin a mass expansion of store locations in the following decade.

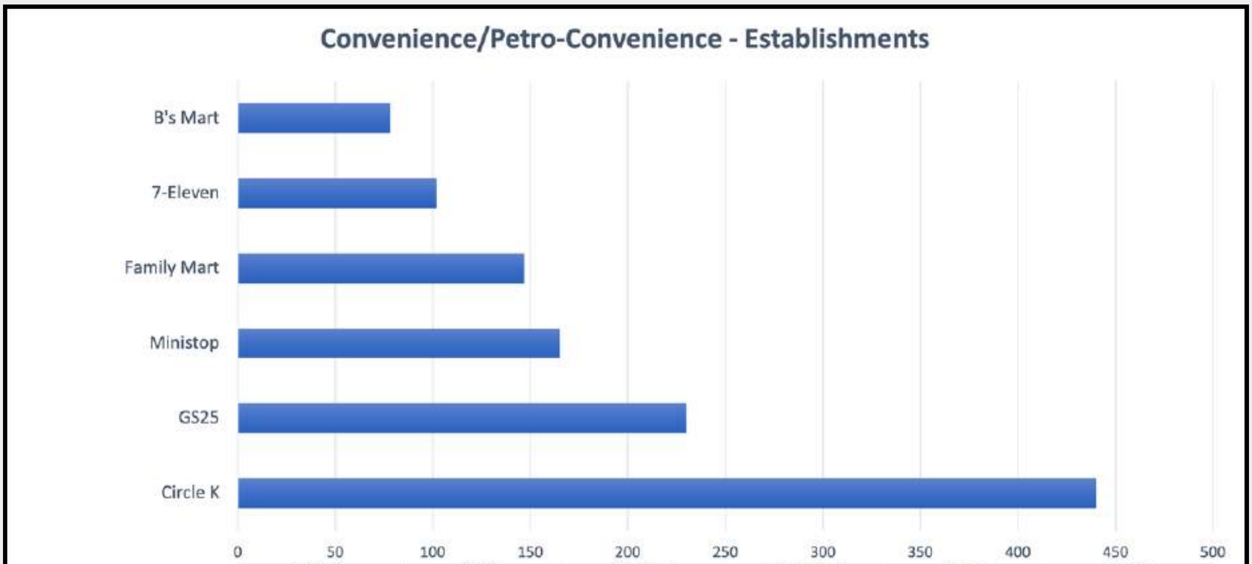
- Over the forecast period, the competition between supermarket operators is expected to intensify amid greater efforts to expand sales shares across both urban and rural areas. Additionally, private labels are expected to develop a growing presence in the Vietnamese market, with these offerings appealing to price-conscious consumers.

Grocery Retailing Brand Outlets:



	WinMart	Bach Hoa Xanh	Giac Mo Sua Viet	Co-op Food	Co.opMart	Lotte Mart	AEON Citimart
Outlets	4,085	1,926	642	430	128	15	13

Convenience/Petro-Convenience Brand Outlets:



	Circle K	GS25	Ministop	Family Mart	7-Eleven	B's Mart
Outlets	440	230	165	147	102	78

Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- As a result of government restrictions on eating out, along with higher consumer preferences for dining in a more socially distanced manner, restaurant sales value across all categories, but particularly full-service restaurants declined greatly in 2020 relative to previous years.

- The Foodservice industry is expected to make a strong recovery through 2021-22 as urbanisation and economic growth continue to rise, with compounding annual growth forecasts for the following five years at 13.05%, eventually placing the value of the market at over US$65 billion.

- Chained restaurants offering diverse cuisines in major city centres are expanding rapidly, many of the most successful retailers being those that employ the fast-food service model such as MK (Thai).

- Restaurants that had previously prioritised customers eating-in began to prioritise either their own delivery services or partnering with third-party delivery apps, the latter of which is by far the most popular option for restaurants, as the COVID-19 pandemic evolved.

- Independent, mostly Full-Service Foodservice operators were most affected by the decline in sales created by the COVID-19 pandemic because these businesses did not have access to the same funds as chained operators nor flexible leases or other operational capital necessary to withstand short-term losses.

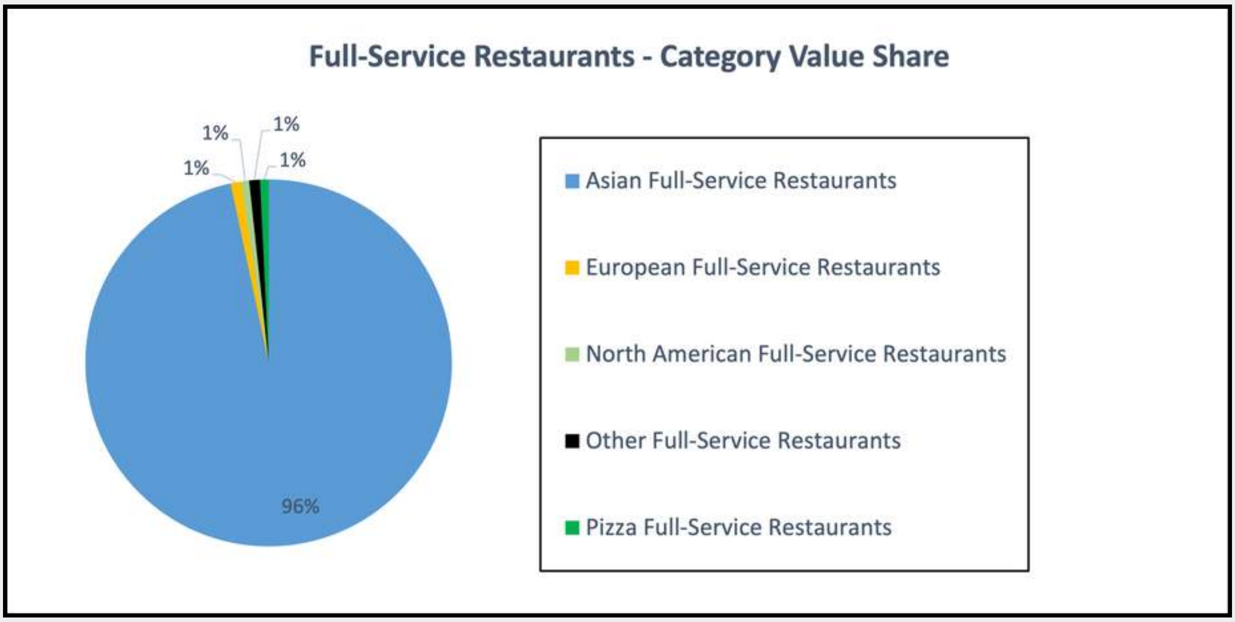
- Customers making orders with restaurants directly over the phone would often struggle with phone connectivity problems and frequent miscommunication issues as the result of different Vietnamese dialects. Food delivery apps have thus made the ordering process much easier and, also because these apps reach a much wider customer base, are usually preferred by restaurants.

- Ice cream limited-service restaurants suffered the worst out of all restaurant categories affected by the COVID-19 pandemic because the product is seen as very much a luxury treat across Vietnam.

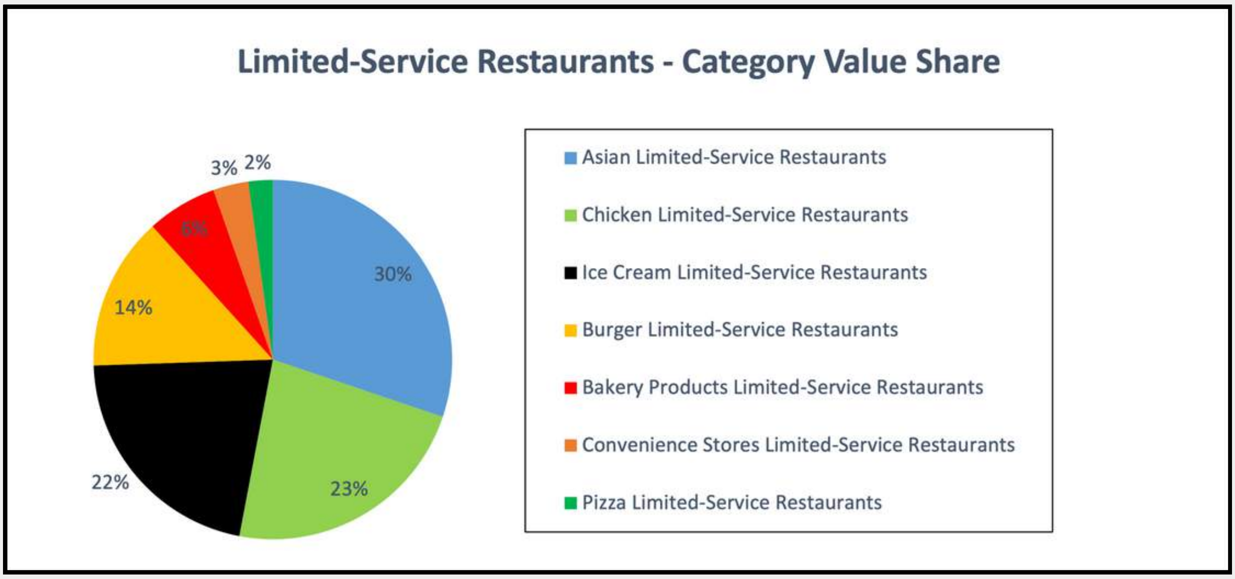
- Many online food delivery apps have created portals to compare menu items and prices, fuelling increased competition amongst partnered restaurants to lower prices and offer special promotions for at-home diners.

- In order to gain brand trust and subsequent loyalty, businesses are becoming increasingly transparent with ingredients and promoting more detailed origin stories for specific products and the brand as a whole.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Approximately 73% of Vietnamese use e-Commerce channels for shopping at least twice a week, this trend most prominent amongst lower-income groups and younger generations, who are more tech-savvy.
- The food delivery app market is experiencing a surge in activity, having grown at a compounded annual rate of 38% between 2014 and 2019 before experiencing higher annual growth in 2020. Grab is the most popular app, fulfilling approximately 300,000 orders a day. However, competition is rife, causing driver shortages and issues with app servicing.
- Many new SMEs are focusing on organic and/or vegetarian products, targeting a much younger market through popular social media sites including Facebook and Zalo, as customers tend to use these services more than search engines to look up advertising.
- The onset of the COVID-19 pandemic facilitated large increases in spending through e-Commerce channels for all categories, with overall e-Commerce sales value rising 31% from Q1 2019 to Q2 2020 alone.
- Vietnamese e-Commerce giants Vingroup, Vinamilk and Mobile World were all well-equipped to deal with the explosive rise in demand for products purchased online throughout 2020, in particular groceries, as these businesses had already developed extensive omnichannel services and distribution networks.
- The high competition between delivery platforms as a result of higher e-Commerce sales traffic has led businesses to invest more in logistical and transportation means, as Deloitte research found this to be the biggest impediment on online shopping in Vietnam, with some grocery delivery businesses now offering delivery within two hours.
- Orders through online platforms that involve shipment from abroad face logistical barriers in the form of high shipping costs and a lengthy customs process.
- Mobile apps are much more popular than online websites for making food orders, as major e-Commerce apps have an easier user interface and also allow for users to quickly create profiles that store their details.

Key E-tailers:

- Major food delivery apps include Grab, Now and Baemin, the latter of which was brought in from South Korea in 2019 and since then has proven most popular amongst younger Vietnamese.

- Shopee is Vietnam's most-visited e-Commerce site, with other major E-tailers including Lazada, Sendo and Tiki. Most major e-Commerce retailers in Vietnam have an online presence elsewhere in South East Asia, and the key to their success is having extensive customer service capabilities in Vietnamese. These e-tailers are also very diversified in their marketplace range.

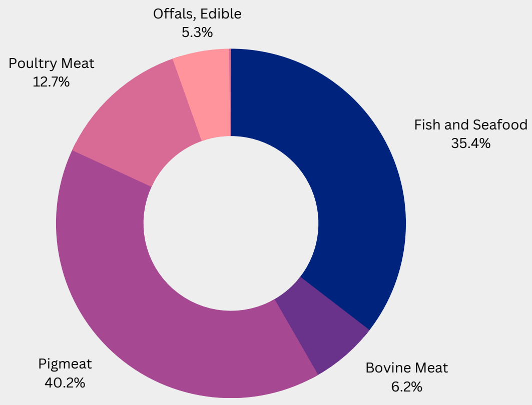
- Shopee and Lazada, as the most visited e-Commerce websites in Vietnam, still only retain approximately 35% of the market share for e-Commerce platforms in stark contrast to other SEA nations that have very oligopolistic and more foreign business-dominated market structures.

Source: Euromonitor

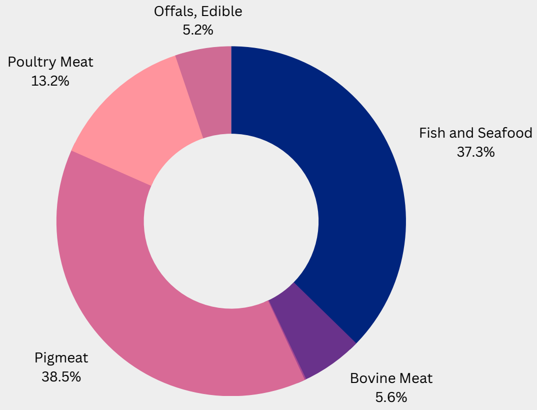
Seafood Consumption in Vietnam

- Fish and seafood supply per person in Vietnam is valued at 36.99 kg as of 2019 according to the United Nations Food and Agricultural Organization (FAO). This value has risen by 3.65% annually between 2014 - 2019, having been previously recorded as 30.92 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: 5.59 kg
  - Mutton & Goat Meat: 0.14 kg
  - Pigmeat: 38.22 kg
  - Poultry Meat: 13.08 kg
  - Meat, Other: 0.01 kg
  - Offals, Edible: 5.14 kg

2014 Protein Consumption* - Food Supply (%)

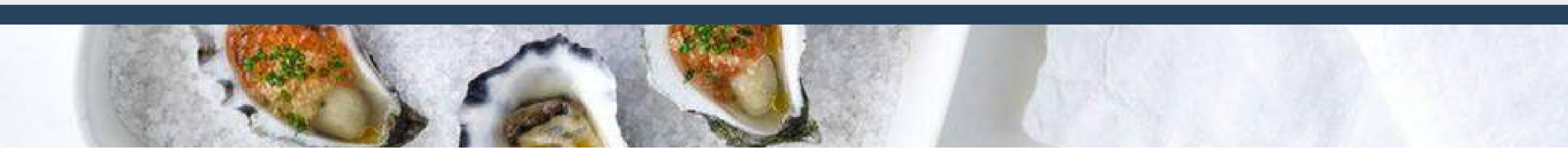


2019 Protein Consumption* - Food Supply (%)



- * 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:

- Vietnam Customs: Carries out checks of imports and collects relevant duties.
- Ministry of Health (MOH): Creates and organises the enforcement of regulations relating to most pre-packaged and processed foods and beverages such as bottled water and functional food.
- Ministry of Agriculture and Rural Development (MARD): Carries out the same functions as the MOH albeit for a range of other foods including meats, vegetables, genetically modified and agricultural products.
- Ministry of Industry and Trade (MOIT): Also carries out the same functions as the MOH but for a range of mostly beverages, along with many other composite ingredients.
- Department of Planning and Investment (DPI): Handles registration of businesses that engage in importing activities into Vietnam.

Product Registration/Import Procedure:

- Vietnam recently updated its food safety regulations through the issuance of Decree No.15/2018/ND-CP, to reduce technical barriers to trade.
- Seafood exporters will need to register with the Department of Animal Health and utilise DAWE to post relevant registration dossiers for confirmation.
- As per DAWE's Micor guide, export registration is required to sell fish and seafood in Vietnam. However, an establishment listed is not required.
- Extra steps, including a pre-shipment inspection, will be involved for importers of agricultural and health products because of additional safety requirements.
- If not using a Vietnamese importer of record, suppliers will have to undertake the steps in the Import Procedure. This situation can be summarised by the steps below.
    - Register with the DPI to obtain an investment certificate and a business registration certificate. This step can take up to three months to complete.
    - File a customs dossier, which includes a customs application form, with Vietnam Customs.
    - Goods are shipped and, once in Vietnam, customs clearance occurs.
    - Pay any applicable import duties and VAT before obtaining a receipt of consumer goods.

Documentation Required:

- The following documents are generally required to facilitate the import process:
    - Commercial invoice
    - Customs dossier
    - Health certificate (for certain food products)
    - Inspection report (for certain food products)
    - Bill of lading and investment certificate
    - Packing list

General Labelling Requirements:

- Food labels must be in Vietnamese, although, supplementing foreign languages are allowed.
- In general, food labels must include:
  - Product name
  - Name and address of manufacturer and importer (if any)
  - Country of origin
  - Net quantity
  - Ingredient list
  - Expiry date
  - Irradiated foods declaration
  - Notice of genetic engineering
  - Allergen information
  - Nutrition information
  - Declaration of specific health and/or wellness claims
  - Batch identification for alcoholic beverages (if any)
  - Preservation information (for wines only)

Packaging Requirements:

- Any packages, containers or equipment that comes into direct contact with a good must be declared to the MOH before a product can be sold in Vietnam.

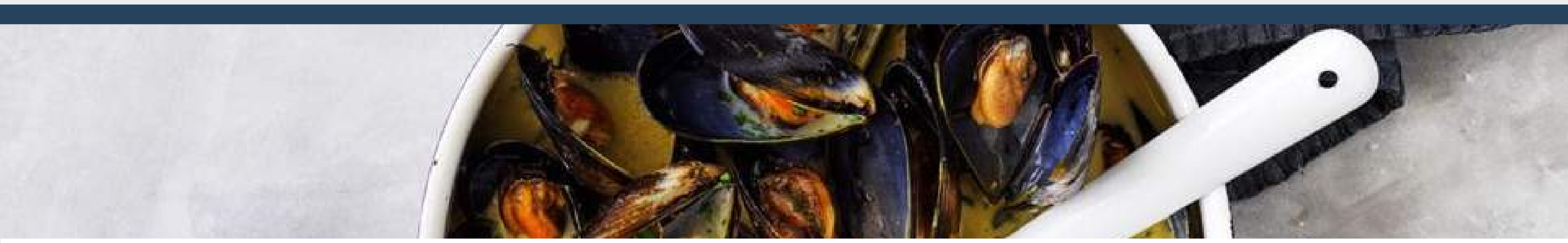
Non-Tariff Barriers:

- The lengthy customs and quarantining process means that, for first-time importers, the compliance process necessary before goods can be shipped often takes months.
- Import quotas exist on certain products such as egg, salt and raw sugar.

Tariffs Levied:

- Value-added Tax (VAT): Usually 10%, however, this is reduced to 5% for certain food imports.
- Special Consumption Tax (SCT): Ranges from 25% to 50% and is applied to alcohol imports.
- There is a range of product-specific import duties applicable to food imports however, as part of AANZFTA, businesses exporting products from Australia into Vietnam often receive preferential treatment. More information can be found by applying a product's HS code to the search tool available on the DFAT's Free Trade Agreement Portal.

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



Category Data

Fish and Seafood in Vietnam

Key Trends:

- Total volume sales experienced an 11% decline in 2021, driven by high prices and low availability. Some demand for seafood remained, with cephalopods and molluscs being the best performing category despite a total volume sales decline of 7%.
- While COVID-19 saw a huge retail volume sales boost in 2020, the closure of foodservice channels meant fishermen reduced their offshore fishing frequency, and extensive regional lockdowns caused supply chain disruptions, with these disruptions felt across all channels, including retail, thereby limiting consumer access to such products.
- Foodservice demand weakened further compared to 2020 due to additional waves of COVID-19, thereby compounding declines witnessed in 2020 for fish and seafood sales. Establishments were banned from offering takeaway and home delivery while the border closures contracted tourist visitation, further exacerbating foodservice issues.
- Total volume sales are expected to grow at a CAGR of 8% to 2026, with strong demand across all channels prompting a likely return to pre-pandemic sales by 2023/4. While challenges remain, including infrastructure, weather, investment and supply challenges, rising disposable incomes and the return of tourism are expected to see fish and seafood consumption grow.
- Health and wellness have a positive impact on fish and seafood sales, with fish perceived as a better source of protein than meat, thereby increasing consumption among health-conscious consumers. Other trends affecting business success, especially into the future, include high food safety and quality standards, and sustainable fishing.
- Key players in Vietnam generally invest more into export rather than domestic sales due to the higher profitability associated with exporting.

- Rising incomes are driving increased seafood consumption, especially products that are considered premium by consumers, such as lobster and crab. These premium products have also become more widely available and affordable in recent years.

- Chilled and frozen products will be increasingly preferred and available, with the rising presence of refrigerated trucks, chillers and freezers for retail stores across Vietnam.

- The average unit price is expected to further rise in 2022 due to imported products being subject to exchange rate and supply variations, however, prices are set to stabilise over the forecast period as rising demand stimulates a return of domestic fishing efforts.

- While fish and seafood are traditionally sold via wet markets, modern grocery retailers and e-commerce businesses tend to offer a more limited range. However, due to COVID-19, e-commerce platforms now offer a greater variety of fish and seafood. With improvements in logistics to transport fresh fish and greater demand via e-commerce, further growth in e-commerce sales is expected in 2026.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
Vietnam	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	84.86	5.96
				2027	100.61	3.46
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	175.33	9.01
				2027	229.91	5.57
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	371.11	8.24
				2027	475.23	5.07
		Dried Fish & Seafood	Dried Fish & Seafood	2022	210.87	6.05
				2027	237.91	2.44
		Fresh Fish & Seafood (Counter)	Fish	2022	386.27	7.26
				2027	499.42	5.27
			Shellfish	2022	393.19	5.97
				2027	446.25	2.56
		Frozen Fish & Seafood	Frozen Processed Fish	2022	142.62	10.26
				2027	191.15	6.03
			Frozen Whole Cuts Of Fish & Seafood	2022	613.57	9.15
				2027	788.07	5.13

Source: GlobalData, 2024

ITC - Trade Data

Fresh or Chilled Atlantic Salmon in Vietnam

Vietnam - 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	85,670	8,721	27	16	12
1	Norway	68,690	6,993	51	15	11
2	Australia	16,850	1,715	-10	49	45
3	Denmark	130	13	41	53	-6
4	Sweden	-	-	-	-	-
5	Chile	-	-	-	-	-
6	United Kingdom	-	-	-	-	-
7	Canada	-	-	-	-	-
8	Faroe Islands	-	-	-	-	-
9	Iceland	-	-	-	-	-
10	Finland	-	-	-	-	-

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	16,313	2,132	-19	-25	-27
1	Chile	8,985	1,174	-35	-9	-11
2	Turkey	1,635	214	-	-39	27
3	Norway	1,203	157	8	-55	-56
4	United States	1,126	147	-35	21	19
5	Japan	1,056	138	59	-12	-14
6	Denmark	970	127	-2	19	17
7	Australia	804	105	-	45	126
8	Russia	370	48	-73	-46	-47
9	United Kingdom	62	8	-13	-69	-70
10	Ireland	53	7	657	-	-

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 Vietnam

Vietnam - 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	5,301	801	149	-40	-44
1	Japan	3,559	538	155	-10	-17
2	Russia	1,331	201	141	-26	-32
3	United States	410	62	-	-48	-14
4	Norway	1	0	-	-90	-
5	Hong Kong	-	-	-	-	-
6	Australia	-	-	-	-	-
7	Canada	-	-	-	-	-
8	United Kingdom	-	-	-	-	-
9	Singapore	-	-	-	-	-
10	Mauritania	-	-	-	-	-

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	Thailnd	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 Vietnam

Vietnam - 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	68,403	5,432	8	17	14
1	Norway	58,970	4,683	10	21	17
2	Chile	4,989	396	20	7	3
3	France	1,440	114	-21	116	109
4	Poland	1,388	110	91	-7	-10
5	United Kingdom	702	56	-59	35	31
6	China	254	20	110	-	30
7	Iceland	197	16	4,825	-	-
8	United States	123	10	24	-33	-30
9	Germany	97	8	1,840	-	-
10	Denmark	85	7	-	-71	-51

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 Vietnam

Vietnam - 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	85,892	13,726	34	27	19
1	Chile	38,121	6,092	28	44	34
2	Russia	24,678	3,944	67	23	15
3	Japan	15,915	2,543	47	11	4
4	United States	6,662	1,065	-3	16	9
5	South Korea	516	82	-71	102	89
6	France	-	-	-	-	-
7	Canada	-	-	-	-	-
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 Vietnam

Vietnam - 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	25	1	-81	-69	-71
1	Norway	16	1	-79	-13	-10
2	Australia	6	0	-	-	-
3	United States	2	0	-88	-	-
4	Japan	-	-	-	-	-
5	Poland	-	-	-	-	-
6	Lithuania	-	-	-	-	-
7	Germany	-	-	-	-	-
8	The Netherlands	-	-	-	-	-
9	Denmark	-	-	-	-	-
10	Belgium	-	-	-	-	-

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 Vietnam

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

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	2	0	-	-87	-
1	Thailand	2	0	-	-10	-
2	United States	-	-	-	-	-
3	Morocco	-	-	-	-	-
4	Spain	-	-	-	-	-
5	United Arab Emirates	-	-	-	-	-
6	Iran	-	-	-	-	-
7	Greece	-	-	-	-	-
8	Panama	-	-	-	-	-
9	Czech Republic	-	-	-	-	-
10	India	-	-	-	-	-

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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Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Fillets of Pacific Salmon in Vietnam

Vietnam - 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	211	15	-80	-60	-60
1	United States	152	11	-	-43	-51
2	Norway	32	2	-79	-73	-74
3	Japan	27	2	19	-37	19
4	Chile	1	0	-	-89	-
5	The Netherlands	-	-	-	-	-
6	Sweden	-	-	-	-	-
7	Poland	-	-	-	-	-
8	Denmark	-	-	-	-	-
9	Germany	-	-	-	-	-
10	Faroe Islands	-	-	-	-	-

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 Vietnam

Vietnam - 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	350	29	900	94	132
1	New Zealand	350	29	900	-	-
2	Canada	-	-	-	-	-
3	United States	-	-	-	-	-
4	Chile	-	-	-	-	-
5	Belgium	-	-	-	-	-
6	France	-	-	-	-	-
7	Hong Kong	-	-	-	-	-
8	The Netherlands	-	-	-	-	-
9	United Kingdom	-	-	-	-	-
10	Italy	-	-	-	-	-

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

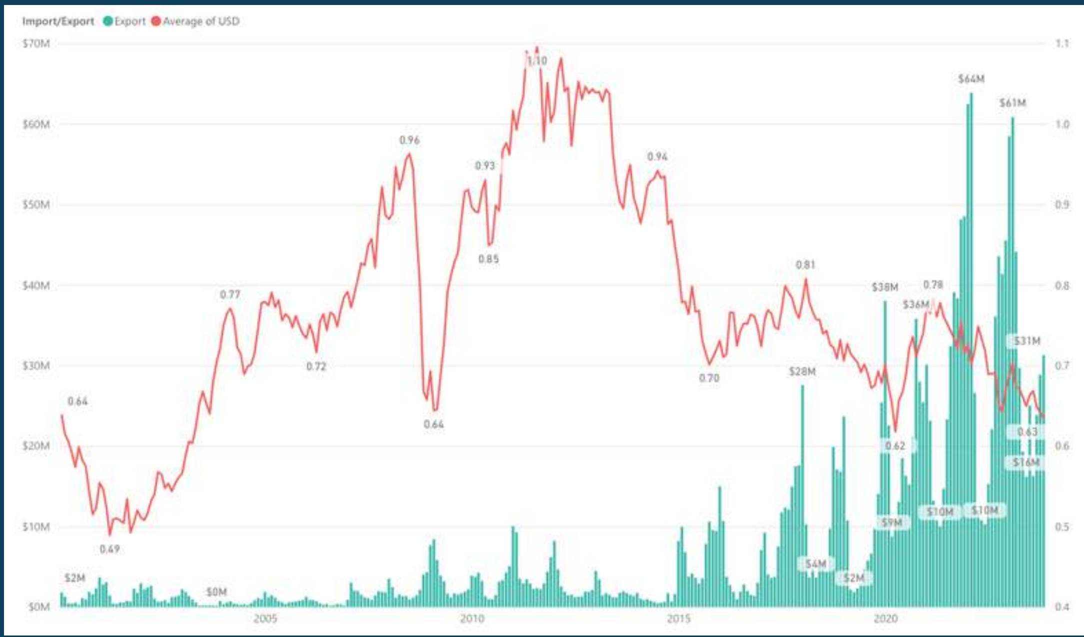
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	1	0	-93	-76	-
1	Christmas Island	1	0	-	-	-
2	New Zealand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

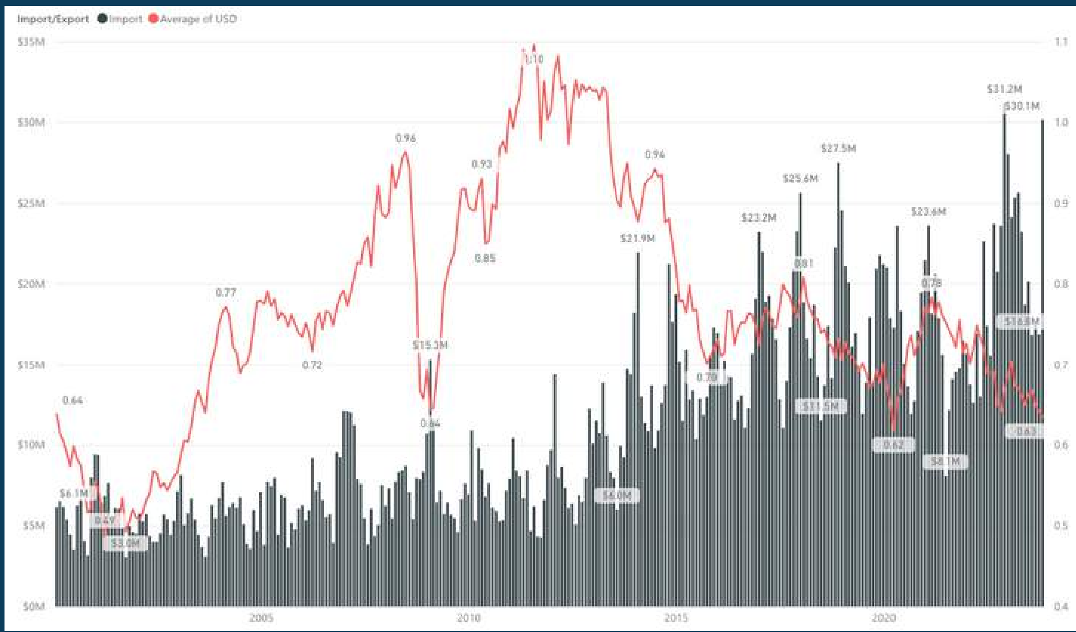
Export Value by State

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

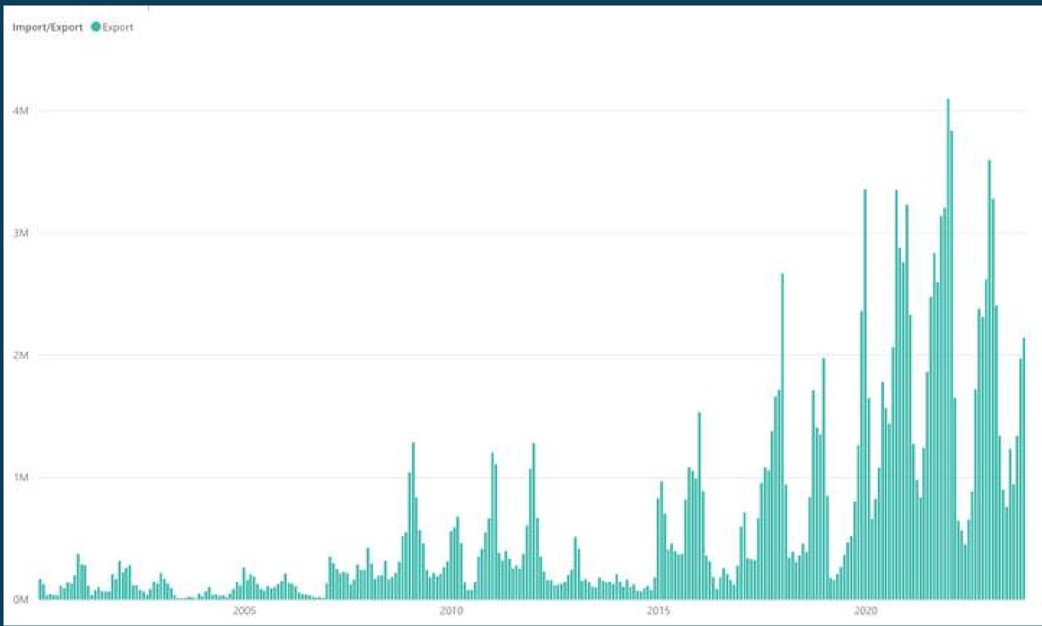
Import Value by State

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

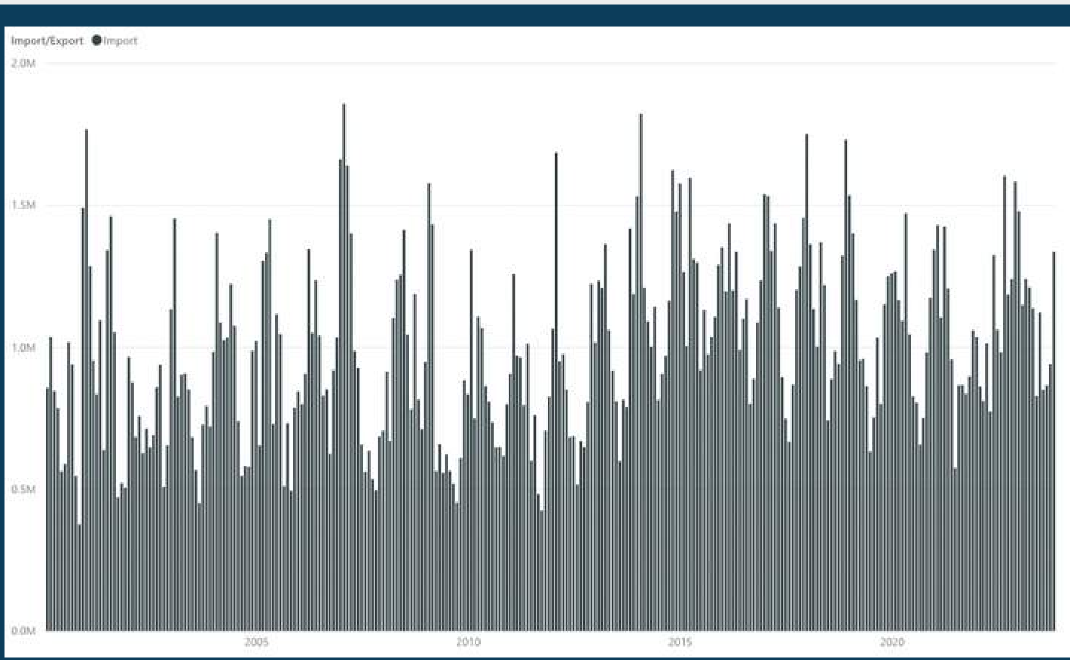
Export Volume by State

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

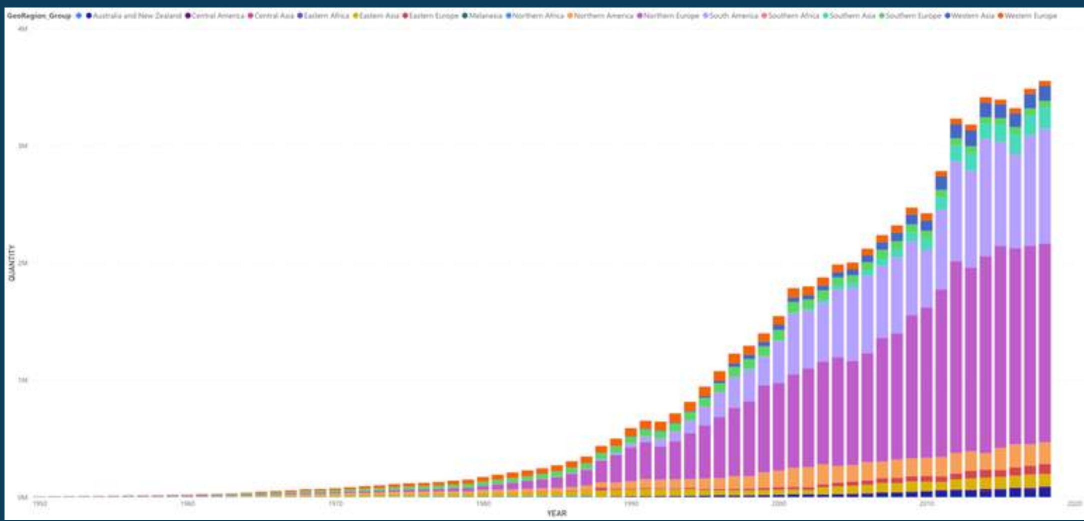
Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Salmon, Trouts, Smelts

ISSCAAP Group: Salmon, Trouts, Smelts

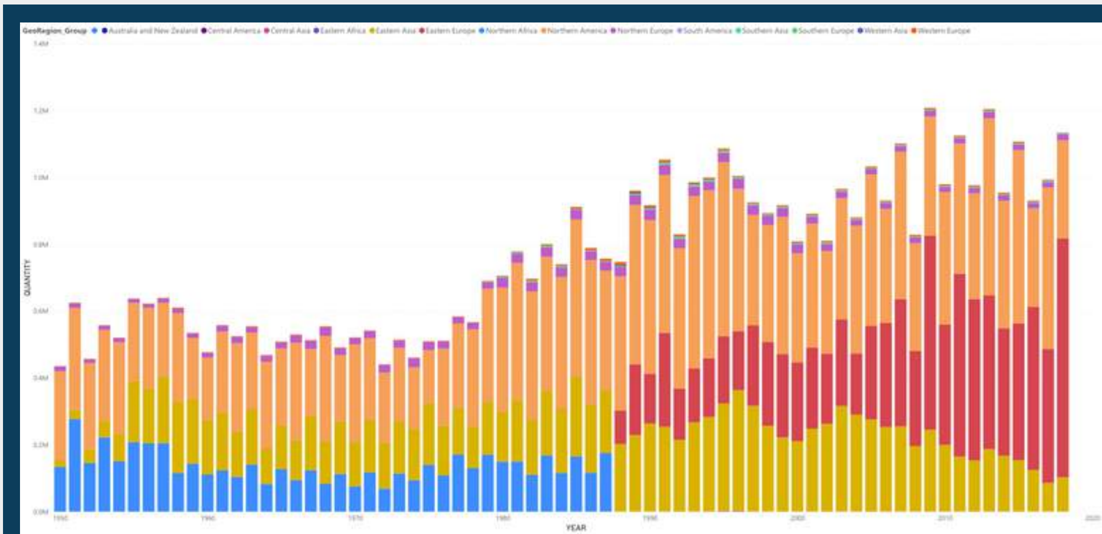
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	40 255	36 775	24 283
Viet Nam	Tonnes – net product weight	58 183	65 678	65 429

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	433 651	332 336	251 977
Viet Nam	Value (USD 1000)	453 341	477 899	473 308

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 - Vietnam Market Profile

DFAT - Vietnam Country Brief

DFAT - Vietnam Market Insights

Enterprise Singapore - Vietnam Market Profile

FoodExport - Vietnam Country Profile

HKTDC Research - Vietnam Market Profile

Santandar Trade Markets - Vietnam Market Overview

USDA - Vietnam Exporter Guide

CONSUMER INSIGHTS

Euromonitor International - Consumer Lifestyles in Vietnam

GWI - APAC Consumer Snapshot

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Vietnam Foodservice Profile

Euromonitor International - Vietnam Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - Vietnam Foodservice Overview

USDA - Vietnam Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - Vietnam Investment Policy Hub

USDA - Vietnam Import Regulations & Standards

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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