Saudi Arabia Market Summary & Category Data for Fish & Seafood - Lobster

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 Billion): **700.12**
- GDP per capita (USD): **$20,110**
- Currency: **SAR** (Saudi Riyal)
- Exchange Rate: 1 SAR = **0.36 AUD** (18/03/2022)
- Mercer's 2019 Quality of Living Ranking (2020 report not released due to COVID-19): Riyadh - **164th**
- Human Development Index: **0.854** and ranked **40th**
- Logistics Performance Index: **3.01** and ranked **55th**
- Ease of Doing Business Rankings: **62nd**

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - Saudi Arabia has 24 Bilateral Investment Treaties in force or signed with its partner countries.
  - The Kingdom is also a party to the GCC Economic Agreement and the EC-GCC Cooperation Agreement.

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

Demographic Indicators

- Total Population (million): **35.1**
- Expatriate Population (million): **10.7**
- Population Growth: **1.59%**
- Median Age: **31.8**
- Urban Population: **84%**
- **Population Ethnicity:**
  - Arab: 90%
  - Afro-Asian: 10%
- **Dominant Religious Groups:**
  - Islam: 93%
  - Other (including Christianity & Buddhism): 7%

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

Consumer Behaviour & Societal Trends

Key Trends:

- Saudi consumers prefer physical shopping experiences at brick-and-mortar stores over online shopping, especially for food and beverage purchases. A distrust of online payment options and delivery delays are some of the issues cited by consumers when surveyed about e-commerce. However, Covid 19 has seen a growth in e-commerce engagement particularly amongst local females and younger shoppers.
    - 74% of online shoppers in Saudi Arabia are between the ages of 18 to 34 years old.
- Although a lessened priority during 2020, luxury brands remain a popular indulgence for Saudi consumers. The preference for expensive, international goods is characteristic of the Kingdom's predominantly youthful population with high levels of disposable income.
- While more than 50% of Saudi consumers share an optimistic outlook on the country's economic future, COVID-19 has prompted shoppers to adopt savvy consumption habits. In 2020, 52% of Saudis were more aware of where they spent their money and 50% of consumers actively looked to reduce costs while shopping.
- Consumers in Saudi Arabia are also moving away from brand loyalty in search of better value for money. 41% of Saudis tried a new retailer and 45% surveyed trialled a new brand during 2020, citing better prices and convenience as the driving factors for their change.
- COVID-19 has seen consumers prioritise health and safety when making purchases. 44% of Saudis have indicated that effective sanitation measures have been the most influential factors in store choice while 52% of shoppers have sought out products with hygienic packaging more than usual.
- Saudi consumers have a strong preference for using cash as the primary method of payment. A low credit card penetration rate has meant that 67% of purchases are made with cash.

Digital Adoption:

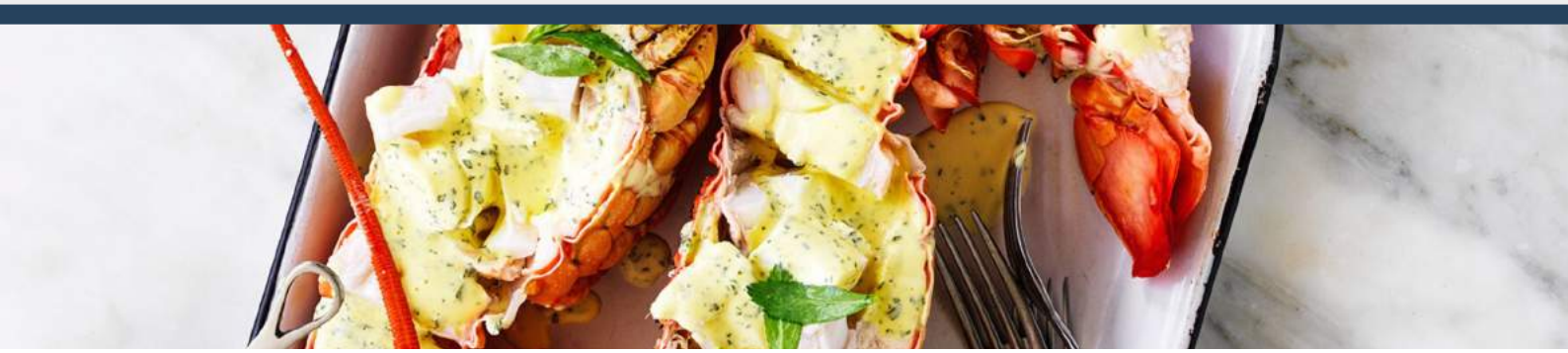
- Saudi consumers are some of the most connected people in the region, spending on average per day 8 hours 05 minutes on the internet and over 3 hours and 24 minutes on social media.

- In Saudi Arabia, there are 34.84 million internet users on any device with a penetration rate of 97.9%, a growth of 1.5% since 2021.

- According to the 'Digital 2022' report, 29.3 million Saudis are active social media users with a penetration rate of 82.3%. This is a growth of 5.4% in social media users over the past year.

- Whatsapp is the most visited social media site at 87.4%, followed by Instagram at 78.1%, Twitter at 71.9% and Snapchat at 68.8%.

Source: Digital in 2022 Report



Grocery Retail Channel Developments

Key Trends:

- The retail sector only recovered marginally in 2021 after experiencing a double-digit decline in constant value sales during 2020. Despite an overall decline in 2020, supermarkets reaped significant benefits, experiencing double-digit constant value sales growth and continued sales expansion in 2021, yet at a much slower rate as consumers returned to foodservice venues.

- 2021 saw lower value sales for hypermarkets as panic-buying decreased. Over the forecast period to 2026, retail sales are expected to rise at a CAGR of 5%. This growth will be supported by aggressive expansions and new store openings, with companies such as Bin Dawood Group seeking opportunities to expand their brick and mortar and offline presence. As competition in the hypermarket industry intensities, regular promotional offers and discounts are becoming common practice.

- As price inflation is expected to remain at an elevated rate throughout the forecast period, consumers will prefer to shop at hypermarkets to reduce costs, as well as affordable traditional grocery retailers such as butchers.

- The Saudi government implemented a VAT rate increase in 2020. Alongside rising inflation, this has led consumers to reduce their discretionary spending and choose to shop at discounters and hypermarkets rather than supermarkets, which generally charge higher prices.

- E-commerce is booming, driven by COVID-19 restrictions and consumer reluctance to shop outside of the home. It also appeals to time-poor consumers, including the growing number of working women, as well as younger, more tech-savvy shoppers. Consequently, players including Amazon, Noon and Carrefour are increasingly investing in their e-commerce platforms.

- E-grocery shopping is expected to account for a larger percentage of grocery purchases into the forecast period as Saudi Arabia's internet retail infrastructure improves, companies increase their investments in online shopping websites and apps, and lifestyles become increasingly busy. This will see hypermarkets and supermarkets take an increasingly omnichannel approach to sales, including click-and-collect services and delivery services with improved costs and speed.

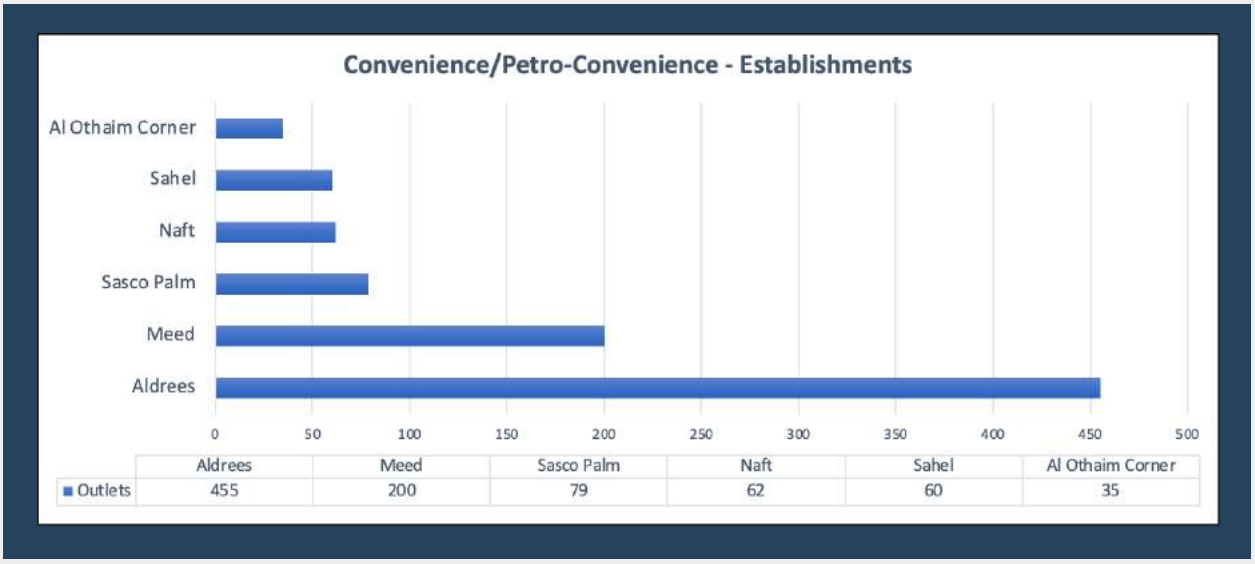
- Supermarkets and hypermarkets are expected to stock more local products as the government seeks to reduce Saudi Arabia's dependence on imported foods, which currently comprise 80% of consumption.

- In the supermarket sector, retail value sales growth has normalised, with a CAGR of 4% forecast to 2026. Leading player Al Othaim Markets continues to expand their store network, with a large number of stores located close to both major and smaller cities, providing an incentive for consumers to visit supermarkets over hypermarkets.

- Competition between supermarkets is set to intensify as industry growth slows, leading players to focus on crafting unique value propositions, including providing imported and organic products.

Grocery Retailing Brand Outlets:

Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- The foodservice industry in Saudi Arabia is set to achieve high levels of growth over the next few years as casual dining increases in popularity. From 2020 to 2025, the market is expected to hit a CAGR of 13.14% and see growth to $13.7 billion in consumer spending. The gradual implementation of Vision 2030 projects directed towards the expansion of the entertainment sector will also help to accelerate further growth in the foodservice market.

- As part of Vision 2030, the launch of Saudi Seasons, a cultural festival targeting tourists, has prompted restaurant chains from neighbouring countries to debut in the Saudi market through a series of pop-up eateries. International chains will continue to penetrate the market in response to the positive reception of Saudi consumers.

- While local brands remain popular, foreign chains dominate both the limited-service and full-service sectors; Pizza Hut is the leading full-service restaurant while McDonald's tops the limited-service restaurant market. Other US-based casual dining restaurants that are popular include Applebee's, Sizzler and TGI Fridays.

- A competitive market has led to chains employing innovative strategies to boost consumer engagement. Steak House employs daily promotion tactics, offering children's meals for free to boost sales. RAW.K, a salad bar in Riyadh, has recently launched a health food robot to provide convenience and freshness to their customers.

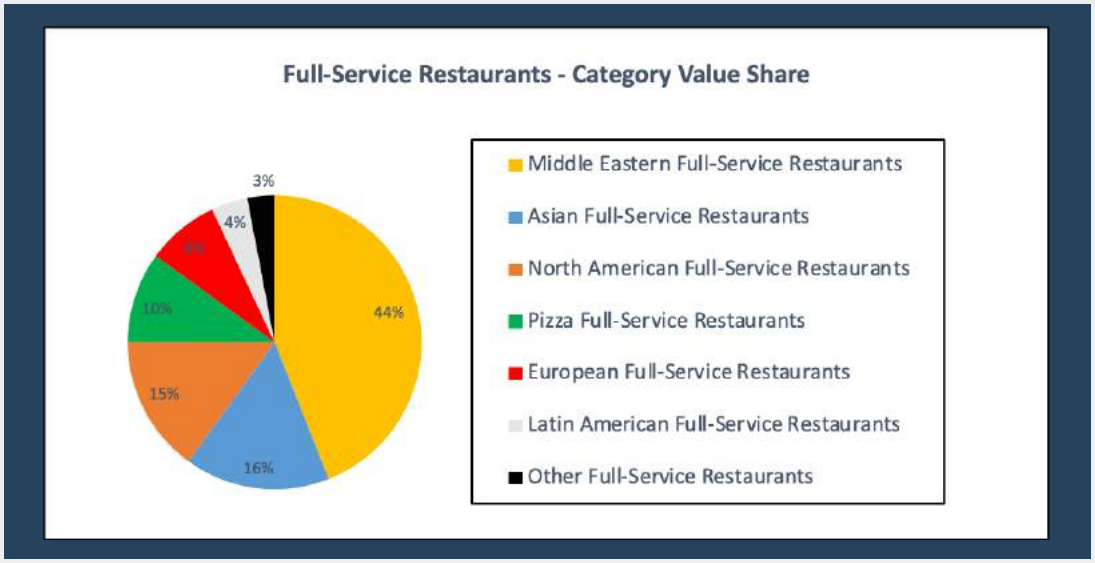
- COVID-19 has seen an increasing trend of restaurants partnering with on-demand delivery services to retain customers. Talabat, Ubereats, Hunger Station and Jahez are the most popular platforms for food delivery.

- Burger restaurants overwhelmingly dominate the limited-service restaurant sector. Saudi Arabia even boasts the world's largest burger restaurant, I'm Hungry. Taking advantage of the growing market, the US-based burger chain, BurgerFi, is set to launch another 6 outlets over the next few years.

- To meet consumer demand for healthier food options, restaurants are offering customisable, lower caloric meal choices for diners. Sinless and Yogi, outlets with a focus on fresh, sustainable dining, have been well-received.

- Many restaurants have adapted to the 2019 changes in gender segregation laws by opening up their premises to allow for mixed ordering and seating arrangements.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:

Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- While Saudis have been traditionally hesitant to engage with e-commerce, Covid 19 has accelerated the growth of online shopping in the region. In April 2020, 55% of the population shopped for groceries online, a stark contrast to only 6% in April 2019. BinDawood Holding reported a 200% sales increase on both Danube and BinDawood e-commerce platforms. Similarly, UAE Carrefour saw a substantial surge of 917% in online orders during the first half of 2020.

- On-demand delivery platforms like Talabat and hungerstation are also offering grocery delivery services, providing convenience to consumers. Nana, an emerging startup with a focus on grocery delivery through the sharing economy, has also proven to be extremely popular.

- Mobile apps are growing in popularity as online consumers seek out convenience. In 2020, BinDawood Holding Co., the parent company of Danube, announced a 400% increase in app installations.

- Omni-channel retailers like Danube have been increasing the range of digital services offered to customers throughout 2020. A new feature of Danube online is the Danube Kitchen which allows home cooks to automatically add all the ingredients needed for a recipe into their online carts.

- Covid 19 has also seen wholesalers transitioning from a B2B model to a B2C model. Sary, the latest entrant into the e-commerce market, targets middle-class Saudis by offering the delivery of bulk goods directly from their warehouse.

- Accelerated rates of e-commerce growth during 2020 has forced large e-tailers to adopt new order fulfilment technologies to meet consumer demand.

    - Carrefour has partnered with Takeoff, a US technology company specialising in automation, to launch micro-fulfilment facilities in both the UAE and Saudi Arabia. Robots have replaced the manual packing of orders to allow products to become available for delivery or pickup in under 5 minutes.

Key E-tailers:

- Amazon.sa holds its place as the top online retailer in Saudi Arabia, offering both international and local brands on its platform. Noon is also popular as an e-commerce retailer.
- The most popular omni-channel retailers are Danube and LuLu Hypermarket. Carrefour has also experienced unprecedented growth.
- On-demand delivery startup, Nana Direct, has been well-received since its launch in 2016.

Source: Euromonitor

Seafood Consumption in Saudi Arabia

- Fish and seafood supply per person in Saudi Arabia is valued at 11.33 kg as of 2017 according to the United Nations Food and Agricultural Organization (FAO).
  - *Food supply is defined as food available for human consumption. At country level, it is calculated as the food remaining for human use after deduction of all non-food utilizations*

Source: FAO, 2021

Market Access Requirements

Key Regulators:

- Saudi Food and Drug Authority (SFDA): Regulates food safety in the Kingdom.
- Ministry of Environment, Water and Agriculture (MEWA): Regulates agricultural product standards.
- Saudi Arabian Standards Organisation (SASO): Coordinates standards related to labelling, packaging and product quality.

Product Registration/Import Procedure:

- Products must be registered through an E-Account with SFDA before importation.
- Exporters can fast-track their certification and registration process by creating an E-Account and completing a form from the Foreign Establishment Registration Service.
- A Certificate of Animal Slaughtering Requirements According to Islamic Law must be obtained prior to the exportation of meat and poultry products to ensure that the slaughtering process has conformed to Islamic regulations. The certificate can be issued at a recognised Islamic institution in the country of origin.
- Exporters are to also ensure that Hazard Analysis and Critical Control Point (HACCP) requirements are met during the production and manufacturing of meat products.

Documentation Required:

- Certificate of origin: The certificate must be authenticated and translated into Arabic.
- Customs invoice
- Commercial invoice: The invoice must include the country of origin, carrier name, description of goods and brand.
- Bill of lading/airway bill

General Labelling Requirements:

- Labels should be in Arabic or include an Arabic language translation (stickering is allowed) of the following on the label:
  - Product name
  - Country of Origin
  - List of ingredients
  - Instructions for use
  - Shelf-life of the product: Both the production and expiration dates are required.
  - Packer's name
  - SFDA has published additional labelling requirements covering additives and antioxidants, health and nutritional claims, warnings, and shelf life for pre-packaged foods.

Packaging Requirements:

- Under GSO 839:1997, food packaging must follow these requirements:
  - All packaging materials that come into contact with foods must be certified food grade and comply with Saudi standards.
  - Packaging must be clean and in a condition that prevents contamination of the food item.
  - Packaging must protect the food product from gaining any external odours, flavours and tastes.
  - Packaging must protect the product from any contamination from micro-organisms, insects or rodents.
  - Packaging must be sturdy and impermeable, offering protection against moisture and other environmental hazards like vibration or static stresses.
  - The packaging must not be in the shape of a pharmaceutical product.
- SFDA has published additional requirements for plastic packaging and aluminium foil packaging.

Non-Tariff Barriers:

- All imported products are inspected by the relevant authorities at Saudi ports of entry. Health and supplementary foods are inspected by the Ministry of Health. Live animals, plants and seeds are inspected by MEWA while all other foodstuffs are inspected by SFDA at Border Inspection Posts (BIPs). The four-stage verification process to ensure imported goods comply with GSO and Saudi regulations are as follows:
  - All documents and certificates are checked.
  - The identities of each food item are verified against the documentation provided.
  - A physical test is conducted to ensure all food products conform with regulations. The labelling and packaging of all products are also checked at this stage.
  - A further laboratory test may be conducted using a sample of the consignment to ensure food safety standards are met.

Tariffs Levied:

- A customs duty may apply to imported products. The average rate is 4.85% while tobacco products and energy drinks attract a 100% duty charge.
- All imported products attract a 5% VAT rate.

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

Category Data

Fish and Seafood in Saudi Arabia

Key Trends:

- Due to a move towards protein-rich diets and rising demand for diverse aqua species such as shrimp and oysters, the country's seafood consumption is on the rise. During 2017-18, the country's average per capita fish intake was 11 kg, compared to a global average of 19 kg. Imports are required to fulfil the country's internal needs.
    - To lessen reliance on imports, the Saudi government has launched a number of production-oriented projects to fulfil the country's rising per capita seafood consumption. National food security is a significant component of the government's aim to enhance the region's quality of life, and one of its strategic efforts is to increase the efficiency and competitiveness of locally produced food products.
    - Growing local consumption, fueled by population expansion and rising consumption per capita, is predicted to create 500,000 tonnes of demand by 2030. In 2016, the government announced the "Vision 2030" strategy, which reflects the government's commitment to the burgeoning sector. The strategy emphasises the development of safe and strategic food.
    - By 2030, the "Vision 2030" programme plans to boost output to 530 thousand tonnes. As a consequence, local and foreign investors are becoming more interested in increasing fish and aquaculture production.
- Saudi Arabia's domestic need for fish and fish products is mostly met by emerging nations in South and Southeast Asia, South America, and Africa. Korea, Thailand, the Philippines, India, Bahrain, Bangladesh, the United Arab Emirates, and Malaysia are the principal suppliers of processed fish, shrimp, lobsters, caviar, cuttlefish, sardines, salmon, and tuna. According to the Saudi Society of Agricultural Sciences, since the majority of the Kingdom's seafood is imported from foreign nations, prices are often expensive.
- Processed tuna, which is a cornerstone of the diet, is eaten 2-3 times per week, while other processed frozen fishes, such as Basa, are consumed once or twice per week. Other types of fish, such as hamour and salmon, are rare and only eaten on exceptional occasions.

- Tuna makes for the majority of shelf-stable seafood retail volume sales in Saudi Arabia, and it is especially popular as a source of protein among young men interested in fitness. As a consequence, the prolonged closure of gyms after the outbreak of the pandemic had a detrimental impact on demand.

- Growing consumer sophistication and heightened health consciousness in a post-COVID environment is expected to boost demand for premium imported fish and seafood products within Saudi Arabia, signalling a boost in demand for fish sourced from Europe and the US.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	Saudi Arabia	2021	299.04	3.09
			2026	339.66	2.58
	Chilled Raw Packaged Fish & Seafood - Processed	Saudi Arabia	2021	419.51	4.71
			2026	488.85	3.11
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	Saudi Arabia	2021	282.99	2.08
			2026	304.59	1.48
	Dried Fish & Seafood	Saudi Arabia	2021	148.71	3.08
			2026	164.59	2.05
	Fresh Fish & Seafood (Counter)	Saudi Arabia	2021	831.60	3.72
			2026	938.48	2.45
	Frozen Fish & Seafood	Saudi Arabia	2021	53.67	3.75
			2026	61.00	2.59

Source: GlobalData, 2021

ITC - Trade Data

Crustaceans, Live, Fresh, Chilled in Saudi Arabia

Saudi Arabia - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled, Frozen, Dried, Salted, or in Brine, even smoked... (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '19 - '20)	Annual Growth Imported Value % (Long Term '16 - '20)	Annual Growth Imported Quantity % (Long Term '16 - '20)
-	World	83,359	10,390	-25	5	-2
1	UAE	62,155	7,636	-5	20	2
2	Bahrain	7,826	1,033	-57	2	9
3	Malaysia	3,986	591	-	-	-
4	Pakistan	2,505	274	470	205	52
5	Oman	2,208	148	-	-	-
6	India	1,885	231	-54	-32	-36
7	Yemen	713	246	2,642	-	179
8	China	687	45	-97	-16	-27
9	Thailand	478	61	170	-	-
10	Argentina	247	45	47	-	-

AUS - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled, Frozen, Dried, Salted, or in Brine, even smoked... (Export):

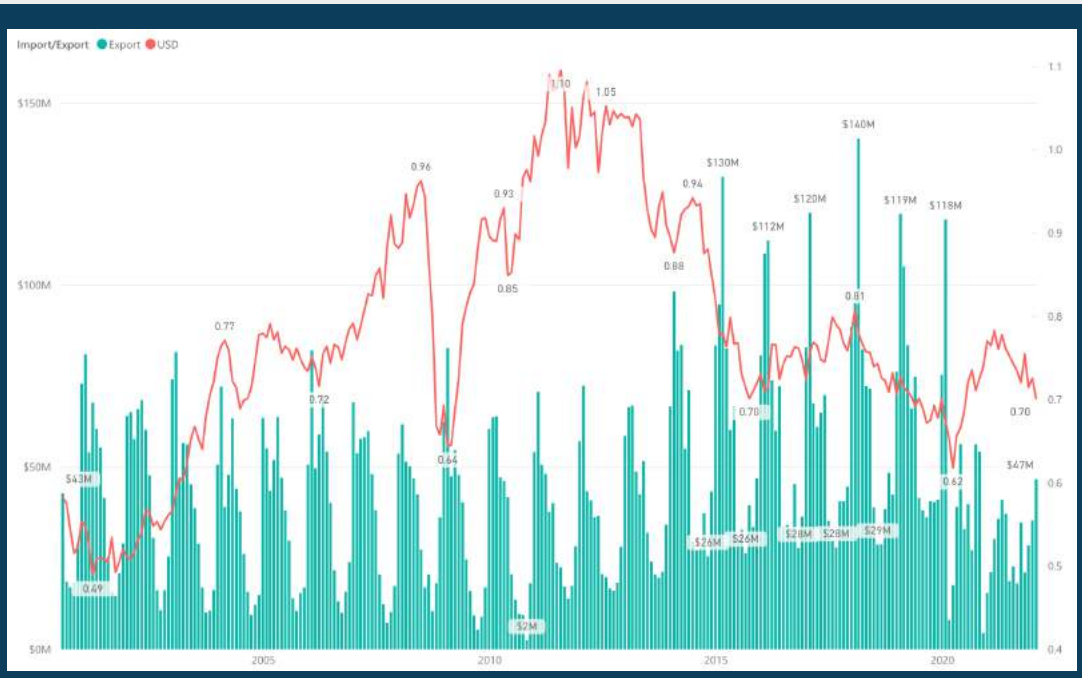
Rank	Country	Exported Value (USD Thousand)	Quantity Exported	Annual Growth Exported Value % (Short Term '19 - '20)	Annual Growth Exported Value % (Long Term '16 - '20)	Annual Growth Exported Quantity % (Long Term '16 - '20)
-	World	398,526	11,836	-36	-9	-6
1	China	313,153	6,282	-42	83	68
2	Hong Kong	33,644	1,836	27	-17	-7
3	Japan	12,904	754	-31	-16	-14
4	Vietnam	10,999	1,245	77	-69	-47
5	Taiwan	7,973	353	84	11	-1
6	USA	7,908	234	-33	2	4
7	Singapore	3,464	125	-4	1	2
8	Thailand	3,304	665	-17	-9	2
9	New Zealand	1,573	110	-48	-23	-24
10	Malaysia	854	43	-72	-31	-39

Source: ITC Trade Map, 2021

FRDC - Trade Data

Lobster Exports - Value

AUS - Trade Data - Species: Lobster (Export):



Value of Exports - Lobster

Commodity Description	Value
Whole live, fresh or chilled rock lobster, whether in shell or not and whether or not eviscerated, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$3,293,744,076
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not	$2,981,949,000
Unfrozen rock lobster, whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process; or cooked in shell by steaming or by boiling in water	$2,822,357,259
Frozen raw rock lobster tails, whether in shell or not	$943,985,398
Frozen whole rock lobster, in shell, cooked by boiling in water	$711,723,220
Frozen raw whole rock lobster, whether in shell or not	$243,402,287
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	$90,123,077
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$89,153,840
Frozen rock lobster, whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	$55,606,464
Frozen lobsters (Homarus spp.) whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. rock lobsters)	$45,362,316
Unfrozen rock lobster, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$9,369,220
Fresh or chilled rock lobster tails, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. tails of lobsters (Homarus spp.))	$7,727,778
Frozen rock lobster, whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	$7,567,363
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	$4,681,961
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	$1,466,532
Dried, salted, in brine, or smoked rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	$689,830
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	$654,500
Prepared or preserved lobster (excl. lobster of Chapter 03)	$335,759
Dried, salted, in brine, or smoked Norway lobsters (Nephrops norvegicus) (excl. frozen, live, fresh or chilled), whether in shell or not	$43,768
Dried, salted, in brine, or smoked lobsters (Homarus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	$27,955

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	$3,471,909,514
Vietnam	$2,908,313,463
China	$2,288,313,506
United States of America	$931,451,463
Japan	$831,371,986
Taiwan	$556,595,549
Singapore	$104,749,286
France	$88,346,185
Thailand	$42,852,169
Malaysia	$25,056,068
United Kingdom	$10,779,273
United Arab Emirates	$10,577,767

Leading Export Destinations - Value

State	Value
WA	$6,955,343,571
SA	$1,667,450,332
VIC	$1,351,110,256
TAS	$576,157,015
QLD	$573,930,440
Foreign (re-export)	$102,789,816
NSW	$83,186,546
NT	$3,627

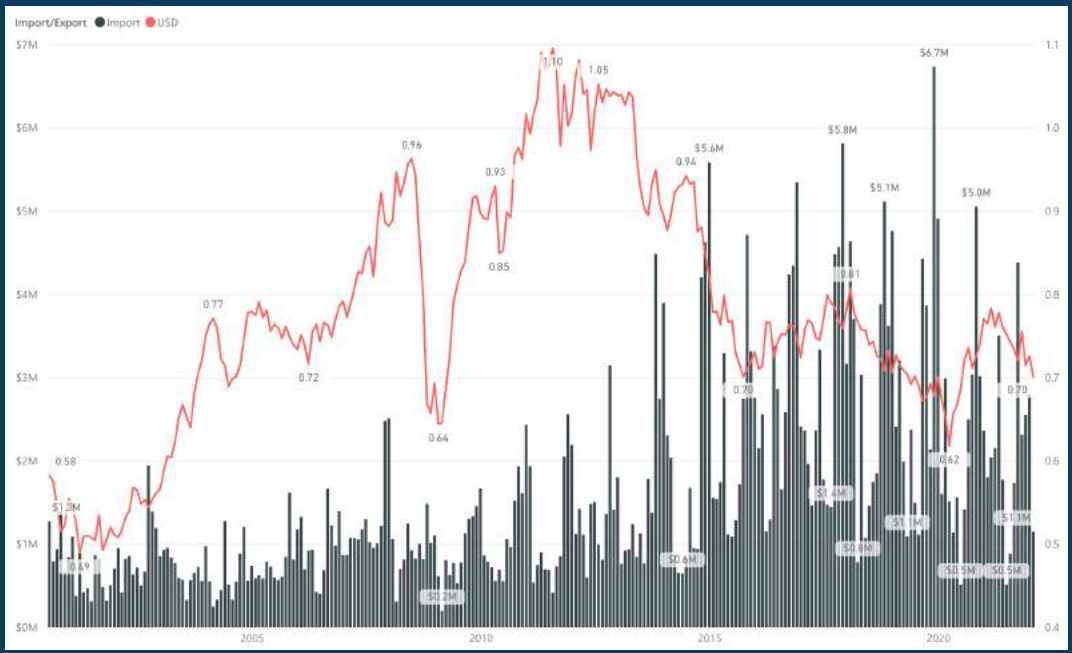
Export Value by State

Source: FRDC, 2021

FRDC - Trade Data

Lobster Imports - Value

AUS - Trade Data - Species: Lobster (Imports):



Value of Imports - Lobster

Commodity Description	Value
Frozen rock lobster and other sea crawfish (Palinurus spp., Panulirus spp. & Jasus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. lobsters & Norway lobsters)	$181,500,291
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	$87,591,678
Frozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	$75,969,816
Frozen lobsters (Homarus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$47,158,161
Prepared or preserved lobster (excl. lobster of Chapter 03)	$5,453,165
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	$3,341,833
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	$3,154,935
Unfrozen rock lobster and sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water	$2,806,624
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	$2,469,200
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	$965,147
Unfrozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water	$144,104
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excludi	$4,365

Value of Imports - Commodity Breakdown

Country	Value
Papua New Guinea	$70,477,417
Brazil	$63,744,227
United States of America	$51,360,928
Canada	$38,431,123
Thailand	$27,840,726
Bahamas	$27,213,729
Cuba	$25,441,149
Indonesia	$20,597,791
Vietnam	$18,094,302
St Helena	$9,740,014
South Africa	$9,677,750
Nicaragua	$6,043,098

Leading Import Sources - Value

State	Value
NSW	$187,815,460
QLD	$103,178,488
VIC	$65,553,495
WA	$48,492,613
SA	$2,778,082
NT	$2,733,183

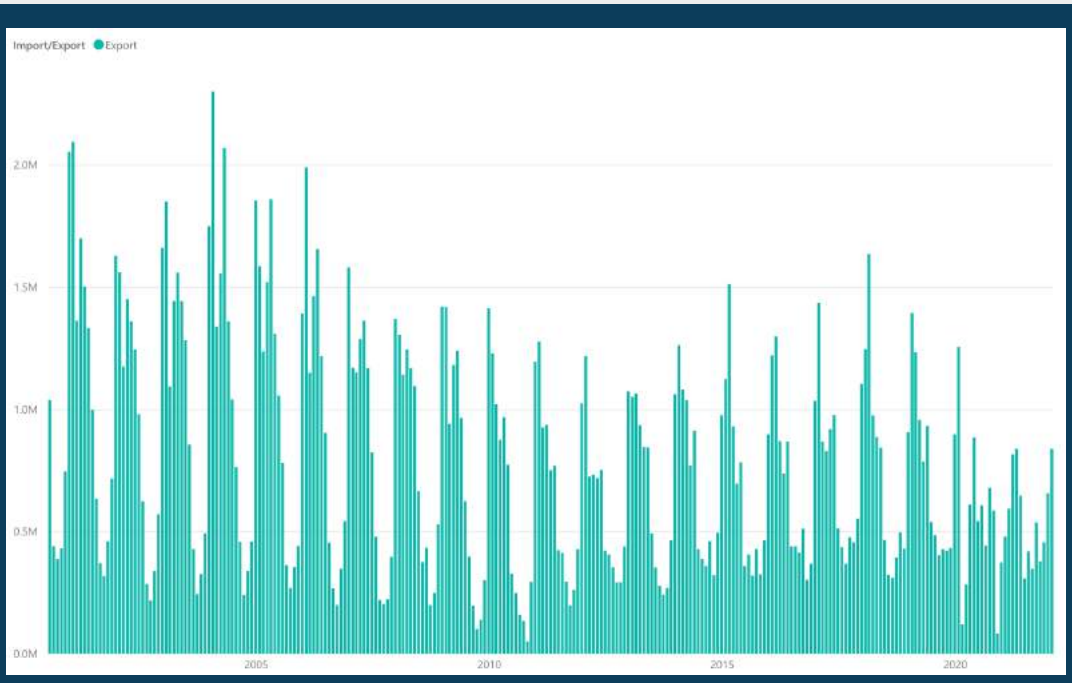
Import Value by State

Source: FRDC, 2021

FRDC - Trade Data

Lobster Exports - Volume

AUS - Trade Data - Species: Lobster (Exports):



Volume of Exports - Lobster

Commodity Description	Quantity
Whole live, fresh or chilled rock lobster, whether in shell or not and whether or not eviscerated, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	74,170,417
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not	39,025,560
Unfrozen rock lobster, whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process; or cooked in shell by steaming or by boiling in water	37,580,542
Frozen whole rock lobster, in shell, cooked by boiling in water	22,180,612
Frozen raw rock lobster tails, whether in shell or not	15,109,831
Frozen raw whole rock lobster, whether in shell or not	7,181,214
Frozen rock lobster, whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	4,202,104
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	2,086,685
Frozen lobsters (Homarus spp.) whether in shell or not, raw, dried, salted or in brine, or cooked in shell by steaming or boiling in water (excl. rock lobsters)	1,121,289
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	1,057,427
Frozen rock lobster, whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. whole rock lobster, raw or cooked in shell by boiling in water; and raw rock lobster tails)	421,587
Unfrozen rock lobster, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	220,726
Fresh or chilled rock lobster tails, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. tails of lobsters (Homarus spp.))	148,003
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	100,754
Dried, salted, in brine, or smoked rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	22,259
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	22,253
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	16,352
Prepared or preserved lobster (excl. lobster of Chapter 03)	13,492
Dried, salted, in brine, or smoked Norway lobsters (Nephrops norvegicus) (excl. frozen, live, fresh or chilled), whether in shell or not	1,320
Dried, salted, in brine, or smoked lobsters (Homarus spp.) (excl. frozen, live, fresh or chilled), whether in shell or not	382

Volume of Exports - Commodity Breakdown

Country	Quantity
Hong Kong	72,049,626
Vietnam	36,800,376
China	32,609,010
Japan	24,715,311
Taiwan	15,985,813
United States of America	15,096,505
Singapore	2,605,166
France	2,241,902
Thailand	699,920
Malaysia	427,403
United Kingdom	244,506
United Arab Emirates	207,727

Leading Export Destinations - Volume

State	Quantity
WA	136,076,142
SA	28,116,824
VIC	17,390,539
QLD	10,317,101
TAS	9,789,356
Foreign (re-export)	1,598,350
NSW	1,393,727
NT	770

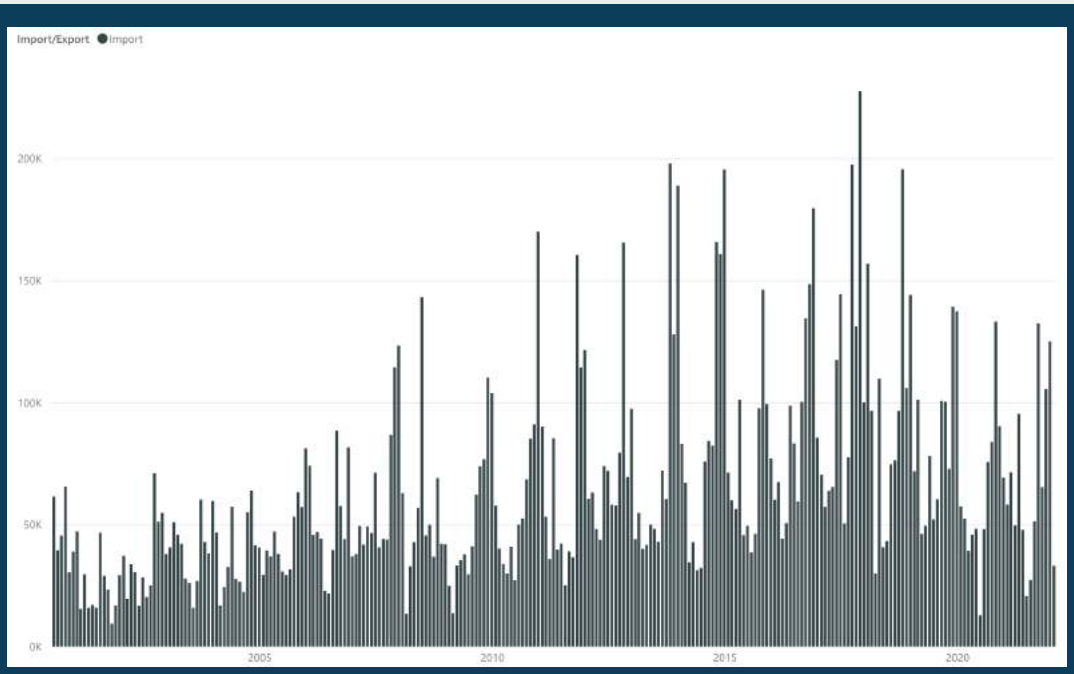
Export Volume by State

Source: FRDC, 2021

FRDC - Trade Data

Lobster Imports - Volume

AUS - Trade Data - Species: Lobster (Imports):



Volume of Imports - Lobster

Commodity Description	Quantity
Frozen rock lobster and other sea crawfish (Palinurus spp., Panulirus spp. & Jasus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. lobsters & Norway lobsters)	5,105,178
Frozen lobsters (Homarus spp.), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water (excl. rock lobsters and Norway lobsters (Nephrops norvegicus))	4,457,152
Frozen lobsters (Homarus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	3,296,564
Frozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. lobsters (Homarus spp.))	3,109,251
Prepared or preserved lobster (excl. lobster of Chapter 03)	337,882
Frozen Norway lobsters (Nephrops norvegicus), whether in shell or not, raw, dried, salted, in brine or smoked, or cooked in shell by steaming or boiling in water	151,925
Unfrozen lobsters (Homarus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water (excl. rock lobsters and Norway lobsters)	69,238
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	68,700
Unfrozen lobsters (Homarus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water (excl. rock lobsters)	67,959
Unfrozen rock lobster and sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not, live, fresh, chilled, dried, salted, in brine or smoked, or cooked in shell by steaming or by boiling in water	65,146
Unfrozen rock lobsters and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.) live, fresh, chilled, dried, salted or in brine, whether in shell or not, or in the shell and cooked by steaming or by boiling in water	4,356
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excludi	300

Volume of Imports - Commodity Breakdown

Country	Quantity
United States of America	2,100,886
Canada	2,044,525
Thailand	1,885,215
Papua New Guinea	1,795,524
Brazil	1,630,996
Indonesia	1,412,588
Vietnam	1,278,561
Cuba	950,734
Bahamas	614,520
Malaysia	405,782
India	330,994
South Africa	325,497

Leading Import Sources - Volume

State	Quantity
NSW	7,135,084
QLD	3,759,731
VIC	2,970,539
WA	2,474,355
NT	291,130
SA	102,812

Import Volume by State

Source: FAO, FRDC, 2021

FRDC - Trade Data Sourced from FAO

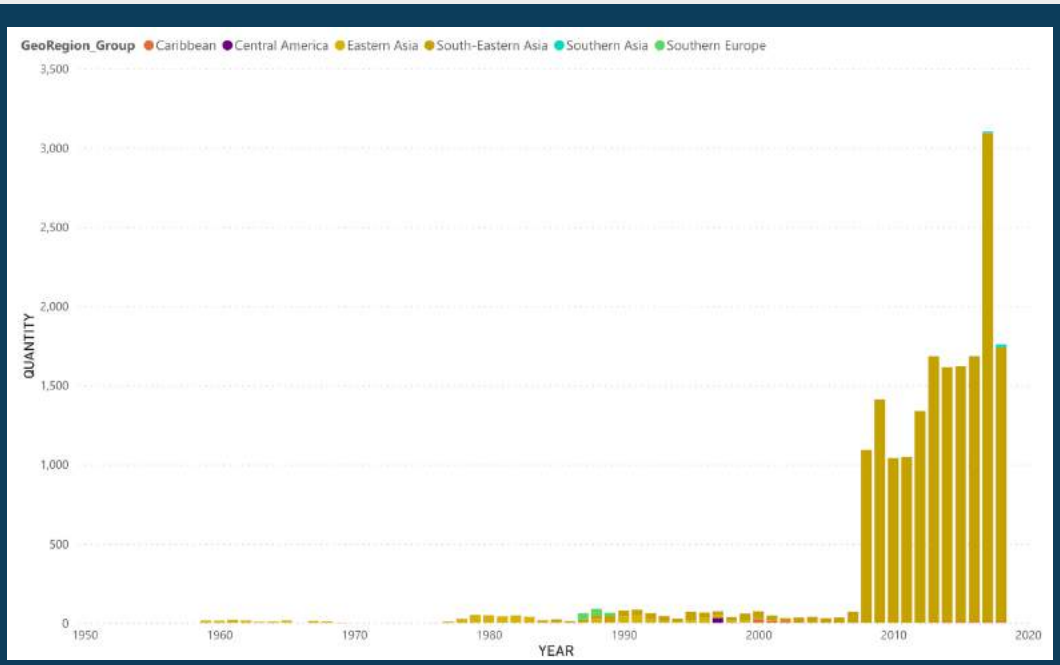
Food and Agriculture Organization (FAO) Capture Production Quantity - Lobsters, spiny-rock lobsters

ASFIS Species: Lobsters, spiny-rock lobsters

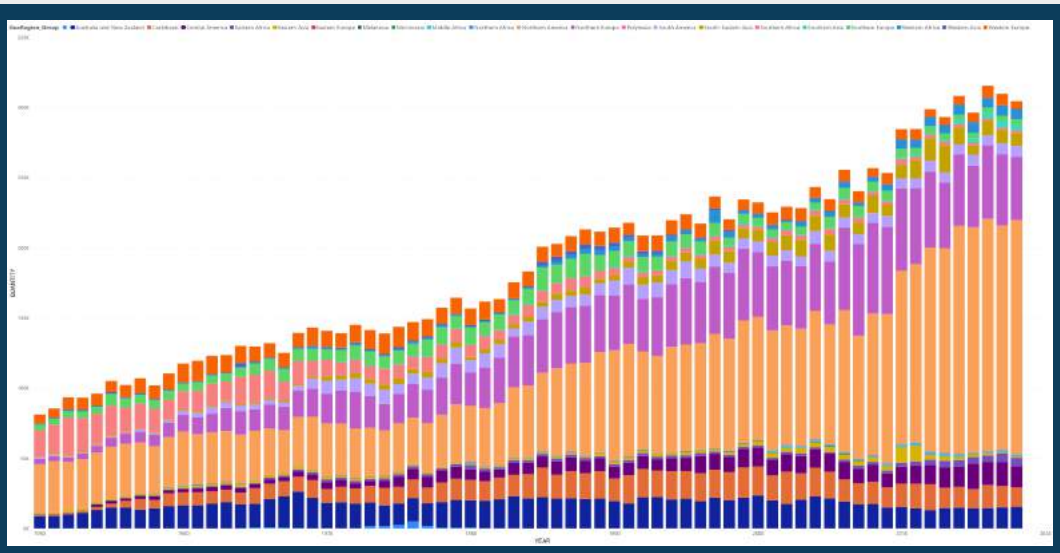
Production

Country Name En	Unit Name	2019
Australia	Tonnes - live weight	9 700
Saudi Arabia	Tonnes - live weight	13

Production Volume 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, 2021

Additional Resources

COUNTRY INSIGHTS

Agriculture and Agri-Food Canada - Saudi Arabia Market Overview

Austrade - Saudi Arabia Market Profile

DFAT - Saudi Arabia Country Brief

DFAT - Saudi Arabia Market Insights

Enterprise Singapore - Saudi Arabia Market Profile

FoodExport - Saudi Arabia Country Profile

HKTDC Research - Saudi Arabia Market Profile

Santandar Trade Markets - Saudi Arabia Market Overview

USDA - Saudi Arabia Exporter Guide

CONSUMER INSIGHTS

HKTDC Research - Saudi Arabia Consumer Market Characteristics

GWI - Saudi Arabia Consumer Snapshot

Attijari Trade - Reaching the Saudi Arabian Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Saudi Arabia Foodservice Profile

Euromonitor International - Fish & Fish Products in Saudi Arabia Category Overview

Euromonitor International - Saudi Arabia Consumer Foodservice Overview

Euromonitor International - Saudi Arabia Retailing Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - Saudi Arabia Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - Saudi Arabia Investment Policy Hub

USDA - Saudi Arabia Import Regulations & Standards

DFAT - Australia-Gulf Cooperation Council FTA

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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