UK 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): **2,829**
- GDP per capita (USD): **42,330.12**
- Currency: **GBP** (Pound Sterling)
- Exchange Rate: 1 GBP = **1.76 AUD** (21/1/2021)
- Mercer's 2019 Quality of Living Ranking (2020 report not released due to COVID-19): London - **41st**
- Human Development Index: **0.932** and ranked **13th**
- Logistics Performance Index: **3.99** and ranked **9th**
- Ease of Doing Business Rankings: **8th**

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - The UK has more than 100 Bilateral Investment Treaties in force or signed with its partner countries.
  - The UK is also a party to the newly signed EU - United Kingdom Trade and Cooperation Agreement and the Central America - United Kingdom Association Agreement.

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

Demographic Indicators

- Total Population (million): **68.08**
- Expatriate Population (million): **9.5**
- Population Growth: **0.53%**
- Median Age: **40.5**
- Urban Population: **83.2%**

- **Population Ethnicity:**
  - 86% White
  - 7.5% Asian
  - 3.3% Black
  - 3.2% Other (Mixed, Arabic)

- **Dominant Religious Groups:**
  - 59.1% Christian
  - 25.1% No religion
  - 4.8% Muslim
  - 11% Other (Hindu, Sikh, Jewish, Buddhist)

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

Consumer Behaviour & Societal Trends

Key Trends:

- Despite a challenging year defined by low rates of economic output, consumer sentiment in the UK is set to slowly rebound back as British shoppers gain confidence in their personal finances.
- COVID-19 has seen a decline in discretionary spending as consumers adapt to tightening budgets. Around 65% of shoppers have reduced spending on non-essential products and 37% of consumers have been seeking cheaper alternatives in 2020 (McKinsey). Similarly, 40% of online shoppers considered clearance websites during the pandemic.
- Consumers in the UK are moving away from brand loyalty due to changing priorities. In 2020, 72% of consumers chose to switch brands in search for better value overall. Availability was also a driving factor for consumers to search for another brand or product.
- 86% of British consumers value convenience when online shopping and 69% prioritise convenience when making physical purchases.
- Responsible consumption is on the rise as consumers seek out brands and products that align with their values. Consumers are choosing to engage more with sustainable or eco-friendly products. A Kantar Smart Shopper study found that 62% of shoppers valued at least one aspect of sustainability (e.g. biodegradable packaging) when purchasing products. Consumers are also increasingly participating in circular economies with eBay recording a 30% growth in second sales during June 2020.
- Healthier eating habits are also influencing consumer preferences with UK shoppers spending an extra 1.4 million pounds on organic products per week in 2020. Meat-free and free-from products are growing in popularity, driven by more health-conscious younger generations.

- British shoppers are more likely to buy products if they believe the brand goes above and beyond to offer a personalised experience. 25% of consumers prefer brands that make them feel 'special' while 70% of UK and US shoppers expect a tailored product experience.

- As Brexit stokes nationalistic sentiments, a percentage of British shoppers are also shifting their product preferences to local brands. 60% of consumers surveyed stated that the origin of the product would be as important as the pricing. Shoppers are also inclined to support local businesses during the pandemic with Waitrose finding that 74% of shoppers would like to see more UK-based businesses.

Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

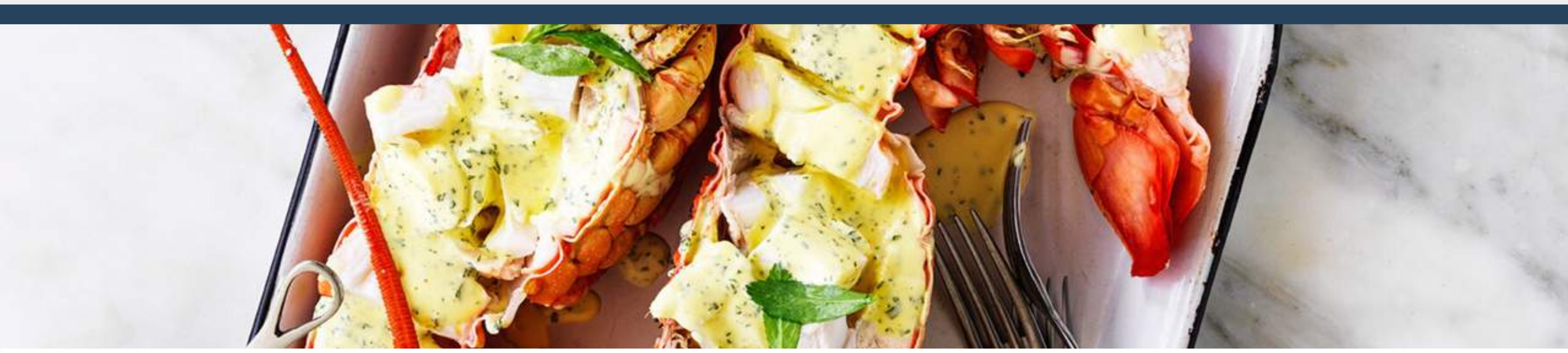
- The British spend on average per day 5 hours 28 minutes on the internet and nearly 2 hours on social media.

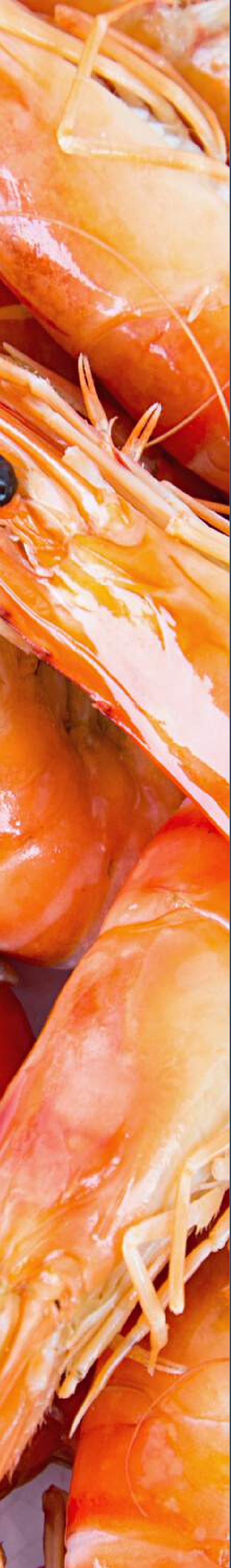
- In the UK, there are 65 million internet users on any device with a penetration rate of 96%.

- According to the 'Digital 2020' report, 45 million British people are active social media users with a penetration rate of 66%. This is a growth of 2.9% in social media users over the past year.

- Youtube is the most visited social media site at 78%, followed by Facebook at 73%, Whatsapp at 62%, and Facebook Messenger at 58%.

Source: Digital in 2021 Report



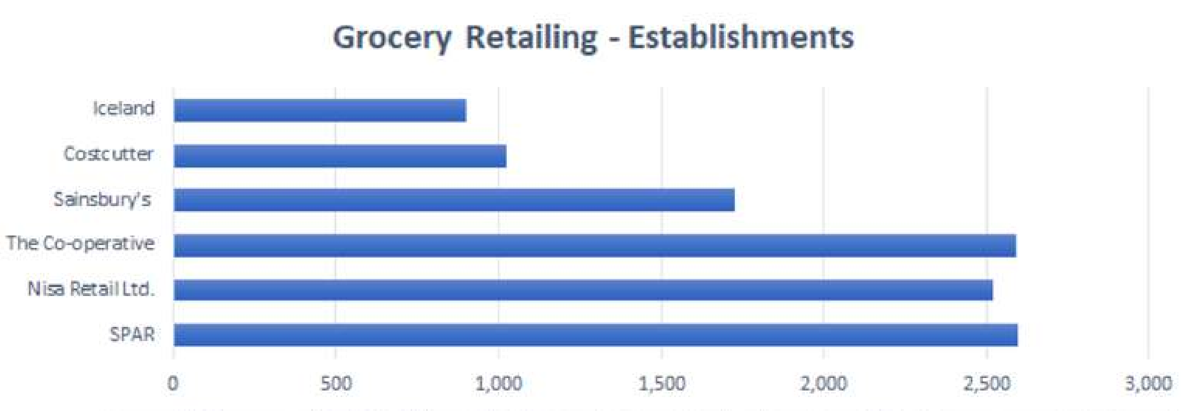


Grocery Retail Channel Developments

Key Trends:

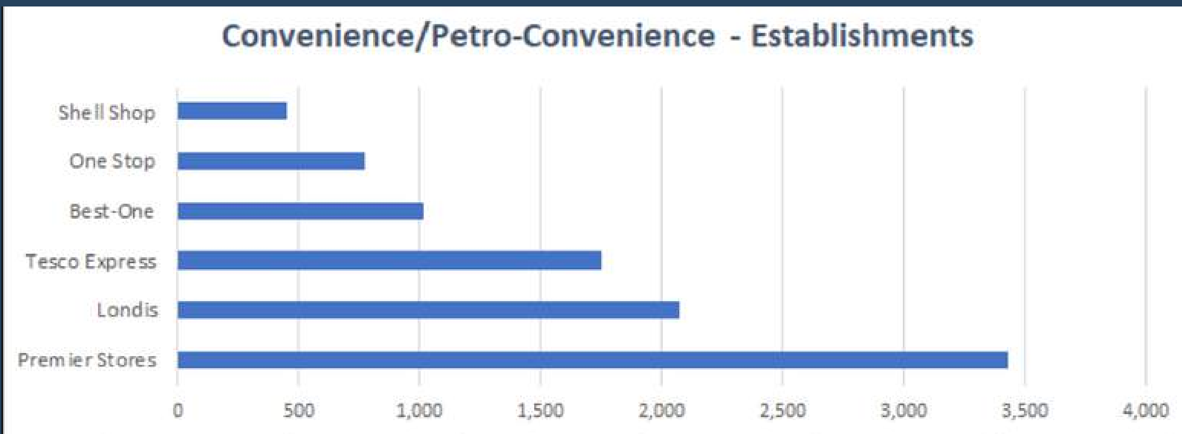
- Total grocery sales grew throughout 2020 as UK consumers flocked to supermarkets. At its height, the sector saw a 20.6% increase in sales during March 2020.
- Convenience stores have experienced accelerated growth rates during COVID-19, accounting for 16.3% of all grocery sales during April 2020. Customers are seeking convenience during uncertain times, choosing to shop locally rather than risk their health and safety by travelling.
- Supermarkets are increasingly adopting an omnichannel approach to maximise customer engagement. 2020 has seen major outlets accelerating the growth of their online platforms to match consumer demand. Collaborations between existing e-commerce retailers and physical stores have also proven to be popular with Amazon Prime launching a partnership with Morrisons, allowing customers to pick up their Amazon Fresh purchases at their local grocery store.
- Government interventions will lead to an increase in supermarket formats that encourage healthier eating habits. Restrictions set to come into force in 2022 will prevent supermarkets from displaying unhealthy food or drinks at checkouts or at the entrances of stores. The People's Supermarket and Planet Organic, which house organic products, are some of the independent stores establishing their presence in the health food market.
- The biggest strategy for grocery retailers currently is to maximise store safety by adhering to hygiene recommendations. Outlets are also reducing prices to increase customer retention.
- Discount stores are on the rise as Aldi and Lidl increase the pressure on traditional supermarkets to offer more value to their customers.

Grocery Retailing Brand Outlets:



	SPAR	Nisa Retail Ltd.	The Co-operative	Sainsbury's	Costcutter	Iceland
Outlets	2,593	2,518	2,589	1,727	1,025	898

Convenience/Petro-Convenience Brand Outlets:



	Premier Stores	Londis	Tesco Express	Best-One	One Stop	Shell Shop
Outlets	3,431	2077	1,754	1,015	770	455

Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- 2020 has been a challenging year for both limited-service and full-service restaurants with the pandemic forcing closures and leaving outlets with uncertain futures. However, the UK government has continued to provide support to the hospitality industry with grants, loans and the implementation of a "Eat out to help out" scheme.

- Restaurants have responded to restrictions by reconfiguring their business models to encompass home delivery, either through in-house delivery or through third-party platforms like Uber Eats or Deliveroo. 2020 has seen a 21% growth in online delivery revenue as consumers increase their engagement with food delivery services.

- Evidence from consumer expenditure data shows that UK restaurant spending by households in April and May 2020 was 30% of its total in the same months of 2019 (Surico et al, 2020).

- Increasingly, restaurants are enhancing their digital systems by integrating QR code menus, mobile ordering, and other remote ordering options to meet consumer demand for convenience during COVID-19. This trend is also increasing in popularity for limited-service restaurants chains as consumers express discomfort at using touchscreen ordering systems during the pandemic.

- As a result of disruptions to physical services, full-service restaurants have also been offering innovative products to stay afloat. Dishoom targeted DIYers by selling cocktail kits while Mother Kelly rolled out Christmas hampers containing craft beers.

- Brexit is also likely to see restaurants shift towards using more home-grown produce as imported goods face new tariffs.

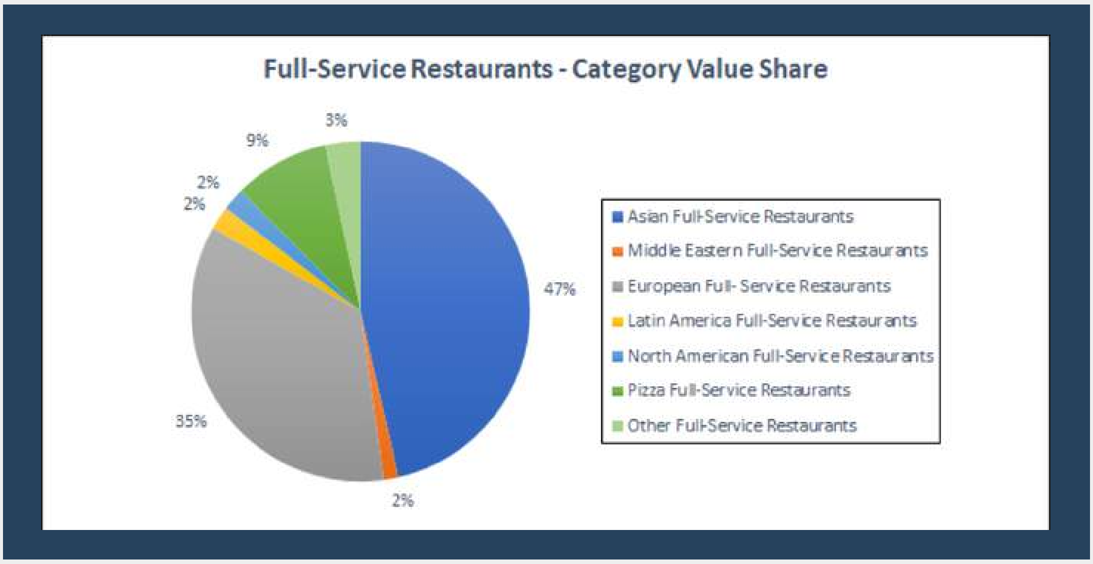
- As demand for food delivery grows, Dark/Cloud kitchens have increased in popularity. These portable kitchens can service multiple operators at a time and are designed especially for businesses to minimise costs when offering food delivery.

- When Covid 19 restrictions ease, alternate foodservice formats are likely to increase in number as consumers seek out enhanced dining experiences. Food halls, which house specialty restaurants under one roof, are set to continue to become fashionable as will pop up restaurants like at 10 Heddon St, Mayfair.

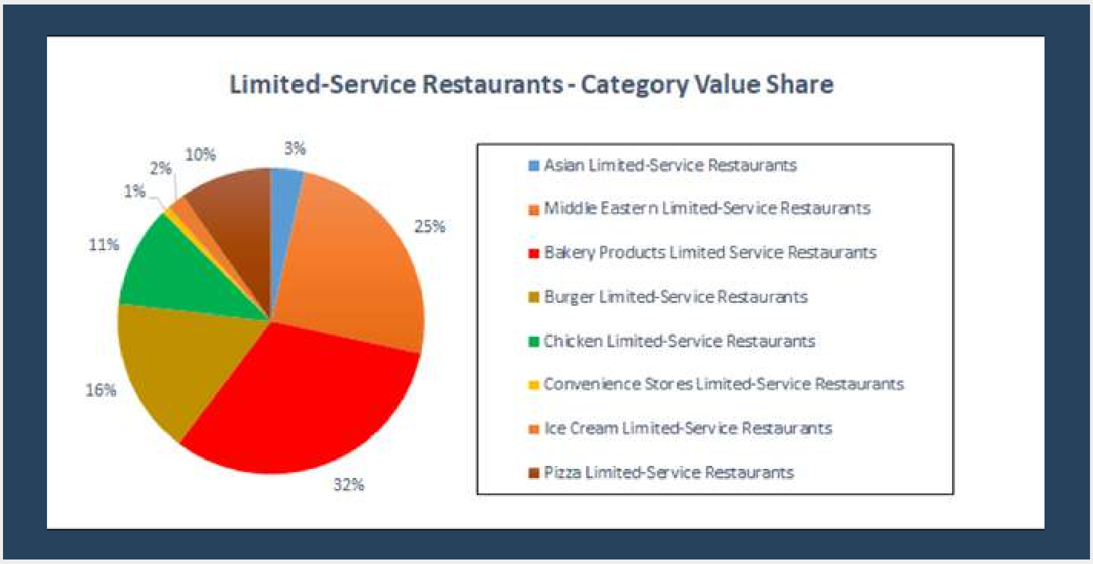
- Healthier food options will populate limited-service and full-service restaurants menus more and more. Vegan, vegetarian and gluten-free menu items are increasingly asked for as are organic and natural ingredients.

- Asian full-service restaurants dominate the sector, followed by European full-service restaurants. The growth in popularity of international cuisine is unsurprising as a Sacla survey found that 70% of British adults rated an international food choice as their favourite cuisine.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Food & Drink e-commerce has experienced substantial growth across 2020. In June, online sales rose by 91% and a predicted 20% of all British shoppers were using e-commerce platforms for their groceries.
- Major supermarkets like Tesco, Asda and Iceland have turned towards optimising their existing online operations to match the surge in consumer demand. Companies have implemented strategies such as 1-hour delivery times, customer rewards and 1 pound delivery fees in a bid to attract more customers.
- However, supermarket chains have found it hard to keep up with the hike in demand. Waitrose opened a new warehouse allowing the chain to double its online deliveries while other chains have increased staff hires and “dark store” locations.
- Sustainability still remains a priority for some online grocery retailers with Sainsbury’s introducing eco-friendly green slots to urge customers to share delivery slots with other people in their area.
- COVID-19 has seen food wholesalers shift towards direct-to-consumer strategies by setting up online ordering platforms. Brakes launched a ‘Food Shop’ service while The Sausage man, a German wholesaler, set up a 24-hour online shopping service without a minimum order requirement.
- Meal kits and recipe boxes have risen exponentially in popularity during 2020. Mindful Chef, a UK based recipe box company, saw a 452% increase in customer numbers and a 387% increase in frozen meal sales. Similarly, HelloFresh struggled to keep up with consumer demand as interest in food subscription boxes hit record highs.
- Online alcohol sales have also been steadily rising during lockdown with consumers stocking up on beer, spirits and wine. In March 2020, Master of Malt, an online beverage company, recorded nearly a 200% increase in online orders. In the same month, spirit sales grew by 23% in comparison to the same time a year ago.

Key E-tailers:

- Ocado is the UK's largest online-only supermarket. Recently, the platform has partnered with Marks & Spencers to offer customers access to a wide range of premium products.

- Amazon Fresh is also a popular choice for online grocery shoppers.

- Most major brick and mortar supermarket chains are all offering online grocery shopping services. The most popular e-commerce platforms include Tesco, Sainsbury's, Waitrose and Morrisons.

Source: Euromonitor

Seafood Consumption in the UK

- Fish and seafood supply per person in the UK is valued at 19.73 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:

- Department for Environment, Food & Rural Affairs (Defra)
- Food Standards Agency (FSA)

Product Registration/Import Procedure:

- The UK is currently undergoing a transitional phase in a post-Brexit reality. Certain regulations are expected to be rolled out in phases throughout 2021. Pre Brexit regulations are as follows:
    - An EORI number is required for importers in the UK.
    - Animal products and live animal imports may require a UK health certificate while certain products like starter cultures will require an import license.
    - The products must also satisfy other specific regulations including labelling and packaging requirements before entry is allowed into the UK market.

Documentation Required:

- Commercial Invoice: Two copies are needed and the invoice must include a clear description of goods, terms of sale, gross and net weights, and the country of origin.
- Bill of Lading: Minimum two copies are required.
- Packing list.
- Certificate of insurance: Useful but not required.

General Labelling Requirements:

- In general, food labels must contain the legal name of the food and use metric units of measurement. Other requirements include:
    - Weight and dimension
    - Country of origin
    - Composition of ingredients
    - Allergen warnings
- However, each food category may have separate requirements that need to be followed (e.g. Fish need to be labelled with the commercial and scientific name, the production method and the catch area).

Packaging Requirements:

- There are no specific packaging requirements. However, if your company qualifies as a 'obligated packaging producer', there are regulations in place to ensure that packaging waste is minimised.

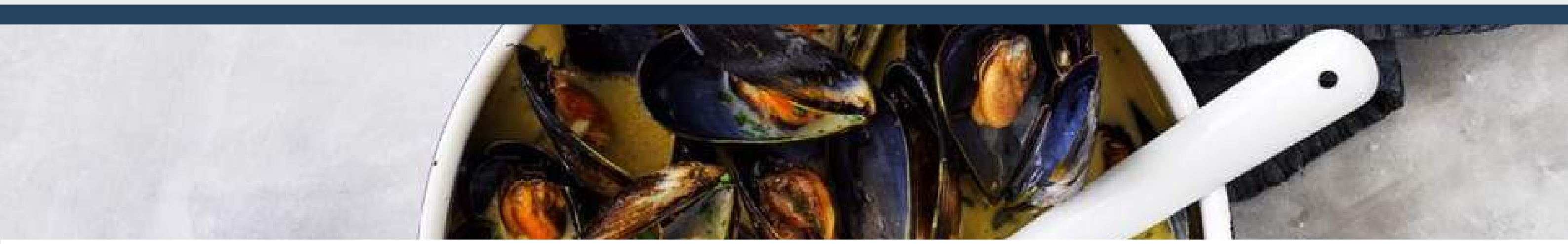
Non-Tariff Barriers:

- Animal products are only able to enter the UK through Designated Points of Entry.
- All imported food and beverage products may also be subject to three levels of consignment checks - documentary, identity and physical inspections. At the port of entry, documentation will be checked to ensure certificates are up to date and match with commercial documents. Labelling and packaging will be checked in the identity stage and a percentage of goods will undergo a physical inspection to ensure the products meet food safety standards.

Tariffs Levied:

- From January 2021, UK Global Tariff rates will apply. The average tariff will be around 5.7%. Exceptions will apply for countries with a UK trade deal, including Australia, or are a part of the UK Generalised Scheme of Preferences.

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



Australia and United Kingdom Free Trade Agreement (A-UK FTA)

- The Australia-United Kingdom Free Trade Agreement (A-UKFTA) was signed virtually on 17 December 2021 and will be tabled in both of Australia's Houses of Federal Parliament, with a National Interest Analysis, and considered by the Joint Standing Committee on Treaties (JSCOT).

- JSCOT will table a report on the A-UKFTA including a recommendation as to whether binding treaty action should be taken. Following JSCOT's report, any legislative changes required to implement the treaty domestically must pass both Houses of Parliament.

- Once the domestic procedures have been completed, Australia and the UK will provide each other with confirmation of their completion through an exchange of diplomatic notes, and the agreement will enter into force 30 days later, or on any other date that is mutually agreed.

- For the seafood industry, the A-UK FTA will mean significant market access outcomes including immediate reduction on most Australian seafood.

- On some products such as lobster, crabs, scallops, shrimps, coquilles and aquatic invertebrates, tariffs will be reduced over a staggered period with all categories free of tariffs on 1 January on year four. This is known as staging category 'B4' and items under this category along with the full list of tariffs and their corresponding schedule is available on the DFAT website.

- More information about the A-UK FTA is available on the DFAT website or through the Free Trade Agreement Portal.

Category Data

Fish and Seafood in the UK

Key Trends:

- Even as retail sales increase, this has not been enough to compensate the loss faced by the foodservice and institutional sectors.

- The pandemic and the subsequent impact on total volume sales has impacted the fish and seafood industry with strong declining demand in 2020. With lockdowns being imposed and the consequent closing of restaurants, cafés, pubs and institutions, sales within the foodservice and institutional sectors have nosedived.

- However, as more consumers have been forced to social distance and stay home, at-home cooking has increased, resulting in an increase in retail volume sales, especially during the initial period of panic-buying. This stockpiling led to the retail volume sales of fish and seafood increasing from minimal growth in 2019 to an 8% retail volume growth in 2020. Nevertheless, this increase in retail sales was not enough to compensate for the loss in the foodservice and institutional sectors.

- When the country was first placed under lockdown in March 2020, many consumers made the move to e-commerce so that they could avoid the risk of contracting the virus while shopping at their usual physical stores. This was especially true of older consumers and those who were more vulnerable in terms of health and immunity.

- With the decrease in foodservice and institutional sales and the simultaneous reduction in exports, the demand for fish and seafood was lower as compared to the supply. Multiple fish sellers adapted to the new normal and addressed customer needs by setting up online ordering platforms and home delivery services so that the surplus supply could be sold directly to consumers. This has resulted in a marked increase in the online sales of fish and seafood in 2020.

- It is predicted that due to the economic impact of the pandemic and the resulting instability, consumers will remain sensitive to prices, especially during the early forecast period. Even though fish and seafood are higher in nutritional value, consumers may switch to alternative, cheaper proteins such as eggs, in order to lower expenses. As a result, it is expected that fish and seafood will continue to see a decrease in retail volume sales throughout the forecast period. However, as more consumers return to on-trade establishments, foodservice and institutional volume sales will begin to rise. As a result, the fish and seafood industry is expected to return to pre-pandemic levels seen in 2019 at the end of the forecast period.

- 2020's lockdown periods have increasingly impacted international trade, while simultaneously bringing into focus Britain's reliance on exports for its supply of fish and seafood. As a means of reorienting the domestic market, more British consumers are trying local fish and seafood, which is available at a cheaper price. Taking into consideration the continued impact of Brexit on exports, this trend towards local fish supplies is expected to continue throughout the forecast period.

- In order to boost sales, the government is expected to launch several communication and marketing strategies aimed at highlighting the advantages of local fish and seafood. These are expected to be the sequel to the #SeaForYourself drive of the Department for Environment, Food, and Rural Affairs (Defra) and Seafish, that ran for three months in 2020. This effort focused on educating British consumers on the health benefits and better taste of local products, thereby hoping to increase sales of fish and seafood caught locally, while also providing consumers with cooking advice and how to prepare fish and seafood.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	United Kingdom	2020	844.12	-1.34
			2025	1,039.63	4.25
	Chilled Raw Packaged Fish & Seafood - Processed	United Kingdom	2020	643.51	-.79
			2025	772.37	3.72
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	United Kingdom	2020	825.79	-1.18
			2025	968.22	3.23
	Dried Fish & Seafood	United Kingdom	2020	37.60	-1.47
			2025	42.36	2.41
	Fresh Fish & Seafood (Counter)	United Kingdom	2020	1,173.45	-.59
			2025	1,447.24	4.28
	Frozen Fish & Seafood	United Kingdom	2020	1,080.01	-1.36
			2025	1,239.53	2.79

Source: GlobalData, 2021

ITC - Trade Data

Crustaceans, Live, Fresh, Chilled in UK

UK - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled... (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	474,905	47,890	-14	-3	-1
1	Vietnam	108,539	11,072	-9	18	18
2	India	101,198	12,014	-10	-6	-4
3	Bangladesh	63,532	3,998	-9	-6	-8
4	Ecuador	38,486	5,341	23	12	19
5	Denmark	27,543	2,785	-23	-5	-6
6	Honduras	24,915	2,175	8	-3	-3
7	Thailand	19,728	1,734	-27	-6	-5
8	Canada	15,422	1,015	-36	-3	-4
9	Ireland	9,910	1,586	-55	-1	-4
10	Nicaragua	9,649	829	23	-7	-6

AUS - Trade Data - HS Code 0306 Crustaceans, Live, Fresh, Chilled... (Export):

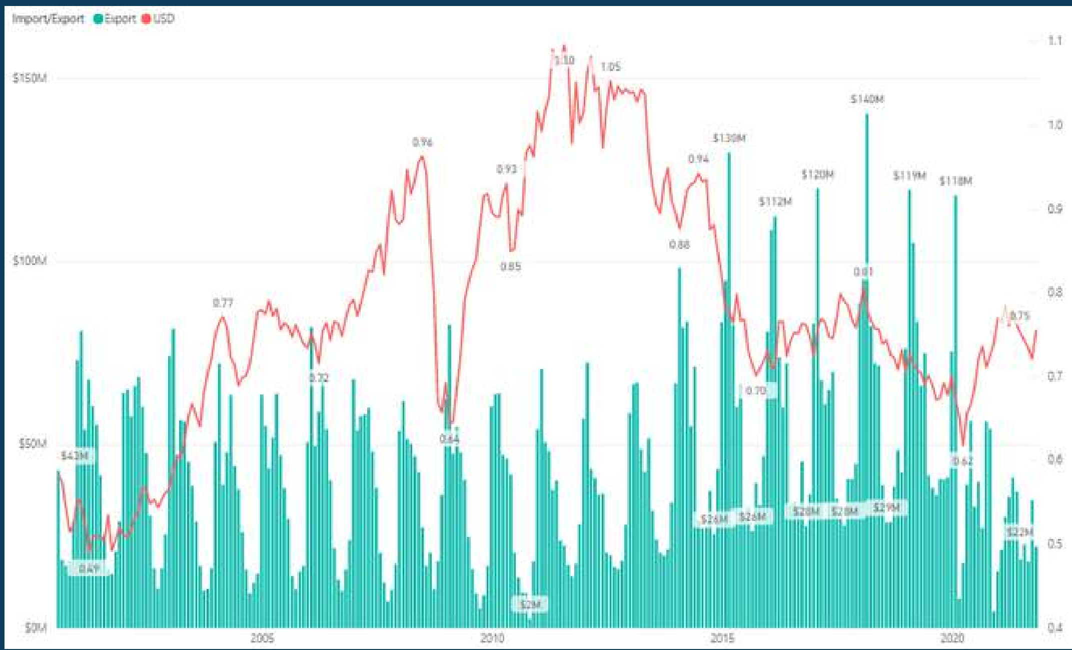
Rank	Country	Exported Value (USD Thousand)	Quantity Exported	Annual Growth Exported Value % (Short Term '19 - '20)	Annual Growth Exported Value % (Long Term '16 - '20)	Annual Growth Exported Quantity % (Long Term '16 - '20)
-	World	398,526	11,836	-36	-9	-6
1	China	313,153	6,282	-42	83	68
2	Hong Kong	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	$2,881,127,441
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	$939,150,541
Frozen whole rock lobster, in shell, cooked by boiling in water	$710,025,248
Frozen raw whole rock lobster, whether in shell or not	$241,464,995
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)	$7,540,114
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))	$4,656,520
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	$1,390,483
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	$591,400
Prepared or preserved lobster (excl. lobster of Chapter 03)	$334,328
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	$3,417,985,724
Vietnam	$2,887,173,109
China	$2,287,192,628
United States of America	$926,161,617
Japan	$830,511,968
Taiwan	$539,469,230
Singapore	$102,721,334
France	$87,303,724
Thailand	$40,253,148
Malaysia	$24,284,962
United Kingdom	$10,779,273
United Arab Emirates	$10,033,853

Leading Export Destinations - Value

State	Value
WA	$6,898,899,192
SA	$1,645,396,316
VIC	$1,326,644,618
TAS	$573,221,574
QLD	$570,953,797
Foreign (re-export)	$102,649,956
NSW	$82,717,573
NT	$3,627

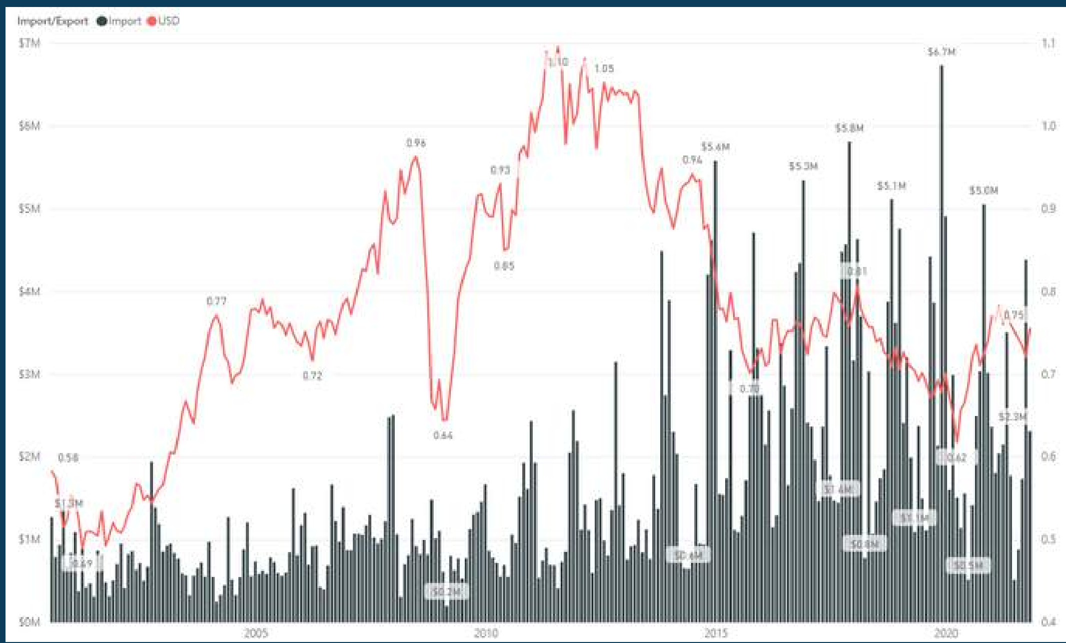
Export Value by State

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)	$178,578,448
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))	$84,144,881
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)	$47,150,161
Prepared or preserved lobster (excl. lobster of Chapter 03)	$5,431,665
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	$3,341,835
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	$3,055,995
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	$69,485,974
Brazil	$62,685,962
United States of America	$51,360,928
Canada	$36,007,413
Thailand	$27,840,726
Bahamas	$27,213,729
Cuba	$25,441,149
Indonesia	$20,093,416
Vietnam	$17,947,084
South Africa	$9,677,750
St Helena	$9,553,454
Nicaragua	$6,043,098

Leading Import Sources - Value

State	Value
NSW	$185,931,420
QLD	$102,089,677
VIC	$62,440,727
WA	$48,089,152
SA	$2,778,082
NT	$2,733,183

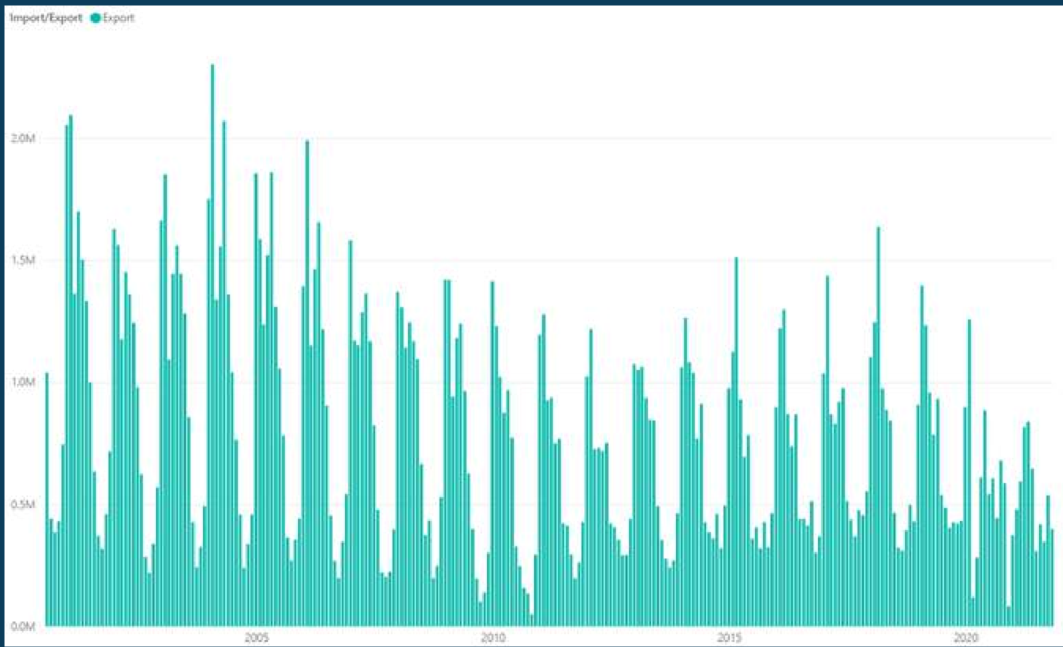
Import Value by State

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
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
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.), whether in shell or not	37,221,851
Frozen whole rock lobster, in shell, cooked by boiling in water	22,147,802
Frozen raw rock lobster tails, whether in shell or not	15,064,210
Frozen raw whole rock lobster, whether in shell or not	7,141,429
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)	418,966
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))	100,378
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	20,749
Live, fresh or chilled lobsters (Homarus spp.), whether in shell or not (excl. rock lobsters and Norway lobsters)	15,244
Prepared or preserved lobster (excl. lobster of Chapter 03)	13,445
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	71,053,888
Vietnam	36,477,467
China	32,588,260
Japan	24,699,257
Taiwan	15,641,986
United States of America	15,043,764
Singapore	2,563,170
France	2,220,821
Thailand	666,999
Malaysia	416,599
United Kingdom	244,506
United Arab Emirates	197,141
Italy	187,283
Belgium	155,871
New Zealand	141,691
Mauritius	99,303

Leading Export Destinations - Volume

State	Quantity
WA	134,912,043
SA	27,782,435
VIC	17,054,514
QLD	10,280,982
TAS	9,740,488
Foreign (re-export)	1,596,634
NSW	1,387,362
NT	770

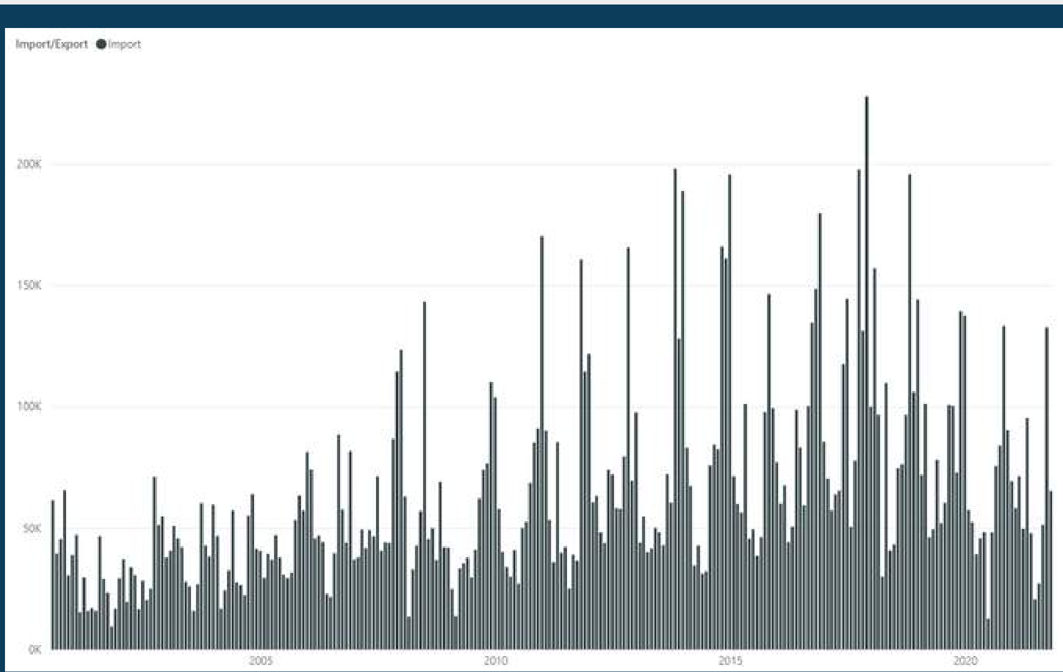
Export Volume by State

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)	5,042,454
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))	4,259,784
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)	336,122
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
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
Live, fresh or chilled rock lobster and other sea crawfish (Palinurus spp., Panu	66,660
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	1,913,834
Thailand	1,885,215
Papua New Guinea	1,778,307
Brazil	1,613,022
Indonesia	1,377,353
Vietnam	1,269,561
Cuba	950,734
Bahamas	614,520
Malaysia	390,220
India	328,994
South Africa	325,497
Taiwan	297,243
St Helena	278,031
Nicaragua	196,999
China	160,437

Leading Import Sources - Volume

State	Quantity
NSW	7,063,723
QLD	3,738,435
VIC	2,837,275
WA	2,436,584
NT	291,130
SA	102,812

Import Volume by State

Source: FAO, FRDC, 2021

FRDC - Trade Data Sourced from FAO

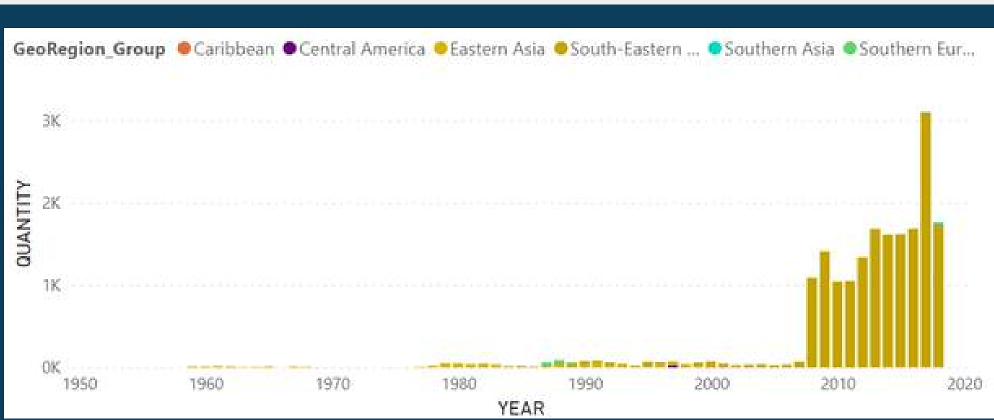
Food and Agriculture Organization (FAO) Capture Production Quantity - Lobsters, spiny-rock lobsters

ASFIS Species: Lobsters, spiny-rock lobsters

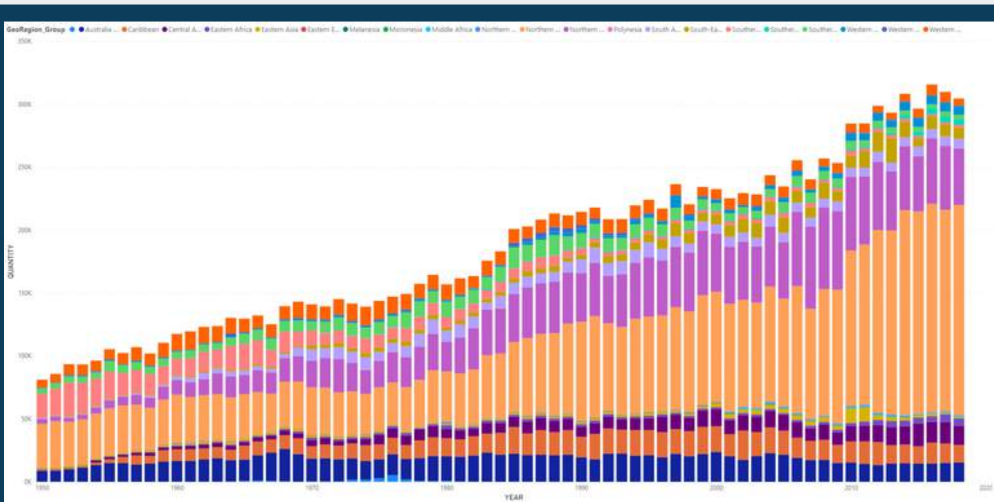
Production

Country Name En	Unit Name	2019
Australia	Tonnes - live weight	9 700
United Kingdom	Tonnes - live weight	37 766

Production Volume by ASFIS (Aquatic Sciences and Fisheries Information System) Species - 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 - UK Market Overview

Austrade - UK Market Profile

DFAT - UK Country Brief

DFAT - UK Market Insights

Enterprise Singapore - UK Market Profile

FoodExport - UK Country Profile

HKTDC Research - UK Market Profile

Santandar Trade Markets - UK Market Overview

USDA - UK Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - UK Consumer Profile

GWI - UK Consumer Snapshot

Santandar Trade Markets - Reaching the British Consumer

CATEGORY & CHANNEL INSIGHTS

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

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

Euromonitor International - UK Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - UK Foodservice Overview

USDA - UK Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - UK Investment Policy Hub

USDA - UK Import Regulations & Standards

DFAT - A-UK 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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