Malaysia Market Summary & Category Data for Fish & Seafood - Abalone

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): **336.3**
- GDP per capita (USD): **11,410**
- Currency: **MYR** (Malaysian Ringgit)
- Exchange Rate: 1 MYR = **0.33 AUD** (17/3/2022)
- Mercer's 2019 Quality of Living Ranking (2020 report not released due to COVID-19): Kuala Lumpur - **85th**
- Human Development Index: **0.810** and ranked **62nd**
- Logistics Performance Index: **3.22** and ranked **41st**
- Ease of Doing Business Rankings: **12th**

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - Malaysia is a part of signed or in force 67 Bilateral Investment Treaties.
  - Malaysia is a member country of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and Regional Comprehensive Economic Partnership (RCEP).

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

Demographic Indicators

- Total Population (million): **32.16**
- Expatriate Population (million): **2.92**
- Population Growth: **1.3%**
- Median Age: **30.3**
- Urban Population: **76%**

- **Population Ethnicity:**
  - 61.8% Bumiputera
  - 21.4% Chinese
  - 10.4% Other
  - 6.4% Indian

- **Dominant Religious Groups:**
  - 61.3% Muslim
  - 19.8% Buddhist
  - 9.2% Christian
  - 6.3% Hindu
  - 3.4% Other (including Taoist, Sikh)

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

Consumer Behaviour & Societal Trends

Key Trends:

- Due to the uncertainty in economic conditions caused by the pandemic, Malaysian consumers are being extra cautious in their spending. 'Altered Truths', a study on Covid-19 consumer trends found that 73% of consumers have reduced their shopping budgets to counterbalance any future potential loss in income or savings.

- There is an increased trend towards supporting domestic brands and local businesses. 86% consumers agreed that they would like to help their local economy by buying goods from a local brand, as found by Black Box Research and Toluma.

- Having said that, most consumers agree that imported products, such as those from Europe are of better quality than local goods. Imported consumer goods such as baby food and imported confectionery are actively preferred over local brands.

- In 2020, 48% of surveyed consumers said that heart-warming brand advertising and marketing were successful in influencing their purchasing decisions, while 44% consumers looked for inspiring brand content, as reported by Unruly.

- More Malaysians are focusing on embracing environment friendly practises that contribute to ethically aware mindsets and habits. In a survey conducted by DIA brands and Rakuten Insights, an overwhelming 72% of consumers said that they actively prefer packaging that is recyclable, while 68% of consumers lookout for brands that contribute to social good.

- While most Malaysians are loyal to their favourite brands, 46% of consumers agree that they would move to a different or newer brand if offered better deals for their product of choice. Amongst all other Asia-Pacific countries, Malaysian consumers are the second most likely to actively look for promotions and deals.

- Malaysians are becoming increasingly health conscious. According to a survey by Oppotus, 46% of consumers prefer foods with reduced salt, while 45% of consumers look out for low-sugar based alternatives. Many consumers are also shifting to meat-free options and actively seek out plant-based products at vegan grocery stores such as Vegan District.

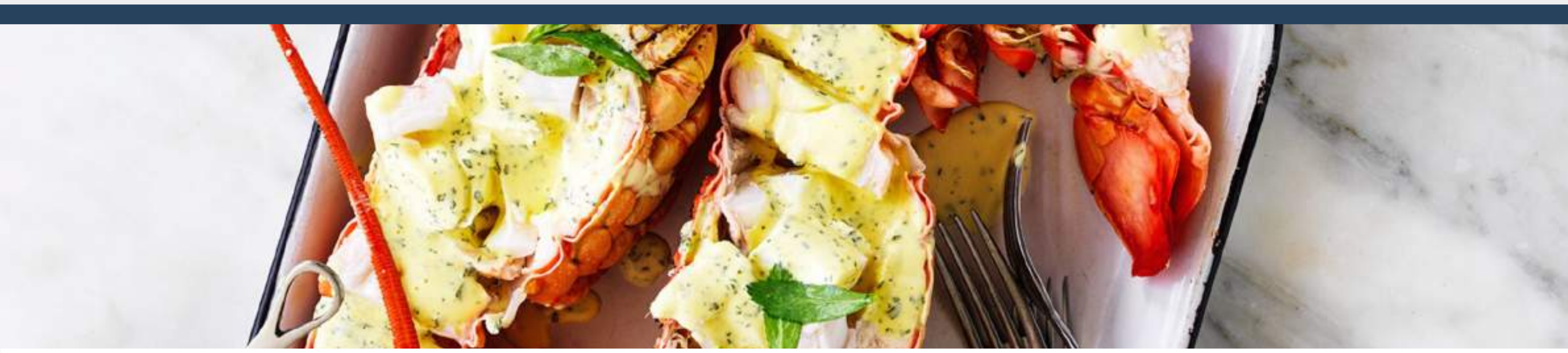
Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

- As of January 2022, there were 29.55 million internet users in Malaysia with a penetration rate of 89.6%, growing 1.3% from the same time in 2021.

- Malaysian internet users, on average, spend 9 hours and 10 minutes daily on the internet. Whereas, approximately 3 hours and 02 minutes a day is spent using social media services.

Source: Digital in 2022 Report



Grocery Retail Channel Developments

Key Trends:

- After the onset of COVID-19 and during 2020, supermarkets and hypermarkets have both seen a substantial decline in growth rates, with a 9.9% decline in the second quarter of 2020. With consumers choosing convenience stores, premium grocery retailers and grocery e-tailers for their increased accessibility and flexibility, many hypermarkets have had to restructure or downsize their operations.

- Convenience stores are experiencing strong sales growth, and chains are expanding the number of stores to capitalise on this growth. Multiple convenience stores have recorded a CAGR of 2.5% from 2014 to 2020. Family Mart, a Japanese brand, continues to dominate the market, especially with its trendy products that captivate the attention of Millennials. Their product range includes new monthly ice-cream flavours, oden and premium Japanese tea.

- Growth in the premium grocer sector can largely be attributed to the rise in the number of wealthy urban consumers, Village Grocer, Jaya Grocer and Ben's Independent Grocer are some brands that are performing well due to their wide range of fresh produce and imported products.

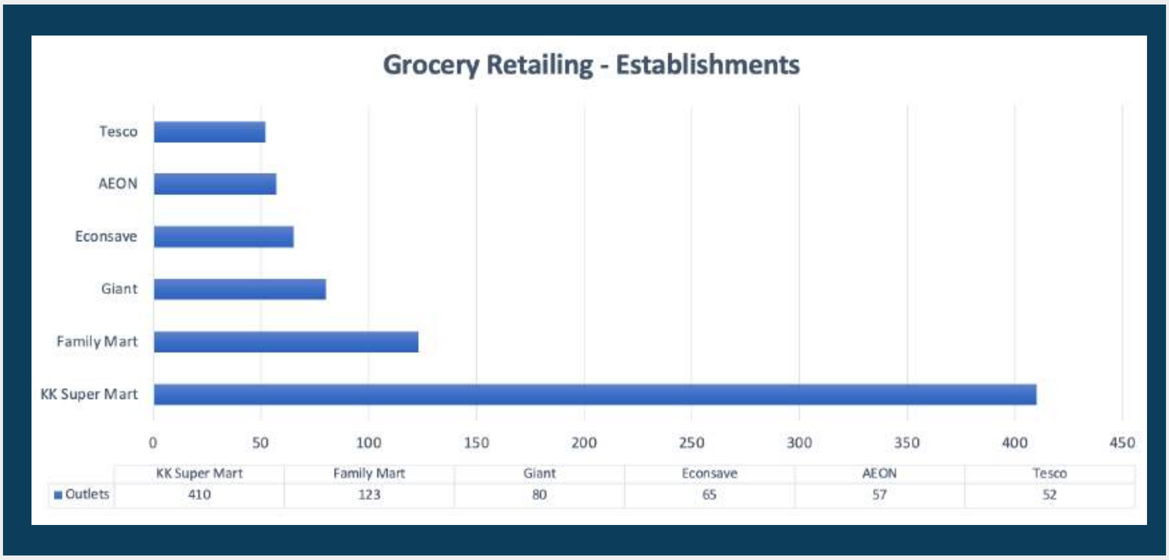
- With new brands entering the market, established convenience store brands have begun focusing on innovative services to raise customer engagement levels. For example, KK Super Mart's 24 hour concept store includes a work zone and massage chairs for shoppers.

- As more customers continue to demand convenience in grocery retail stores, supermarket outlets are increasing their range of ready-to-eat meals to attract more consumers as compared to convenience stores. Tesco has upped its range to include meals like chicken rendang and shrimp wontons.

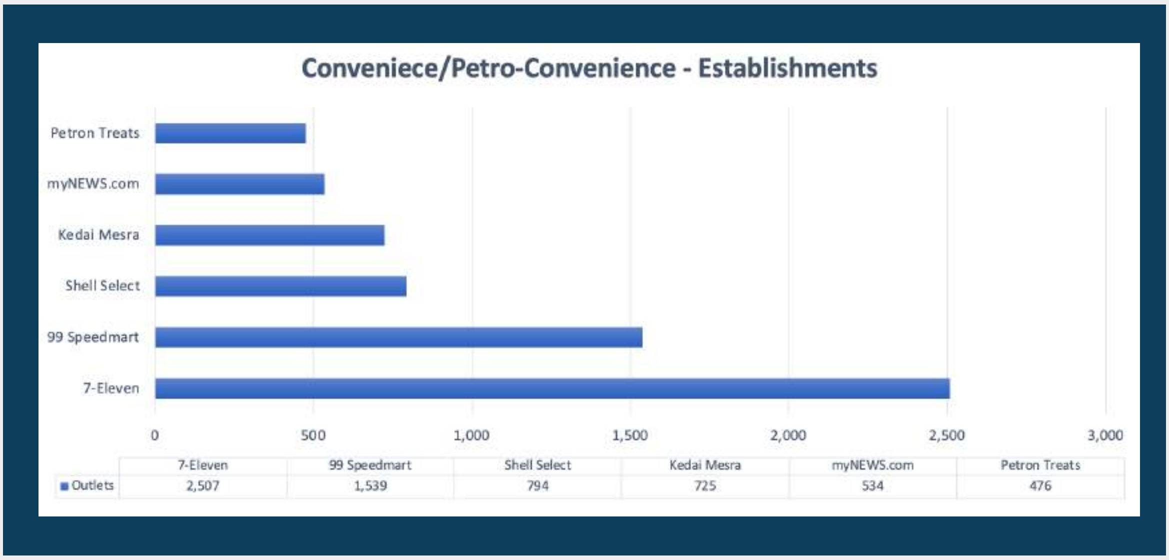
- As a strategy to increase their declining customer base, hypermarkets have launched a number of price promotions and deals. Hypermarkets are also aggressively promoting their private label ranges as affordable alternatives.

- With a change in government regulations in 2020 that has opened up the supermarket space to international brands, it is anticipated that foreign owned small-format grocery stores will increase in frequency over the next few years. Before this change in government policy, hypermarkets were only permitted to be opened to help the growth of local supermarket brands.

Grocery Retailing Brand Outlets:



Convenience/Petro-Convenience Brand Outlets:



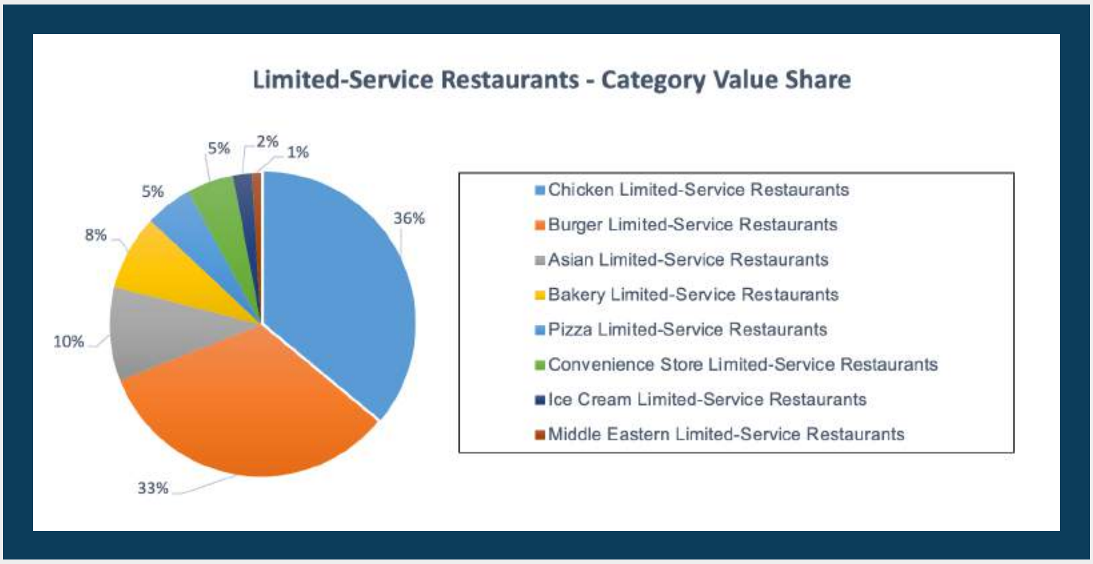
Source: Euromonitor

Foodservice Channel Developments

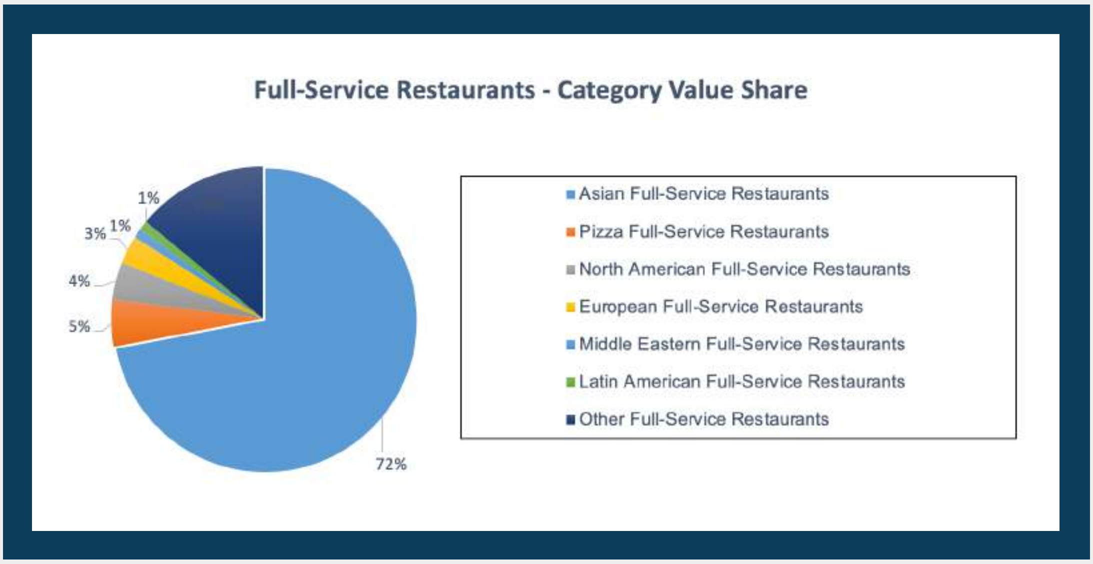
Key Trends:

- To stand out from other competitors, chains are introducing innovative products to attract consumers. In 2019, 7-Eleven began to offer pearl milk teas, while McDonald's started selling extra spicy fried chicken. PizzaHut began to celebrate local flavours like durian with their durian cheese pizza.
- With more customers becoming health conscious, menus in both limited-service and full-service restaurants have begun to include plant-based, organic and lower-caloric items
- Popular restaurants are also moving towards creating premium quality dishes with sustainable and local ingredients. Restaurants such as Nadodi that serve gourmet South Indian food, and Dewakan, a modern Malaysian restaurant have adopted this practise in their operations.
- Both the casual and fine-dining space is dominated by Asian full-service outlets. This shows that Malaysians still prefer local cuisine. In a recent survey, 81% of consumers said that they prefer Malay food, while 72% prefer Mamak food while choosing dining options. 65% respondents said they gravitate towards Thai food while eating out.
- Cloud kitchens are on the rise, especially since the advent of the pandemic. These spaces are shared by restaurant kitchens and catering companies, with food deliveries being done by third party platforms. The recently launched Cookhouse in Petaling Jaya has seen a huge interest from fledgling F&B startup brands. The newest to launch in the cloud kitchen space in 2021 is Grab Kitchen.
- Restaurants are also trying to retain price-conscious consumers by focusing on value meals, reduced-price side dishes and special deals. This is expected to continue with the rise in social media advertising avenues
- Shorter menus are being favoured with most restaurants focusing on quality over quantity in food options. Restaurants have responded to pandemic related restrictions by offering their own delivery services or collaborating with third party delivery platforms such as Grabfood, Bungkusit and FoodPanda.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- The Malaysian e-commerce sector has witnessed unprecedented growth rates in 200 and is anticipated to be worth about $12.6 billion USD by 2024. During the pandemic, there was a 2.2 times increase in customers placing grocery orders online, according to data reported by Facebook, Bain & Co., and Digital Consumers of Tomorrow.

- The e-commerce industry has also witnessed a growth in new brands offering unique online grocery delivery formats. Innovative offerings include personal shoppers to pick out customer orders as launched by HappyFresh, or even the streamlining of the delivery process as done by Potboy Groceries. The latter provides customer information to over 500 brands so that brands can choose the closest warehouse to the consumer, thereby making delivery easier and much faster.

- E-retailers that have smaller scaled operations are being financially assisted by a government initiative that was launched in June 2020, whereby these merchants have also employed new e-commerce strategies to improve sales.

- With the anticipated surge in orders during the Chinese New Year, online retailers are adopting strategies that are innovative. JOCOM, Malaysia's first grocery e-commerce app, has collaborated with 11street to start a 10 episode cooking show that highlights Chinese New Year recipes, with ingredients that can be bought on the JOCOM store.

- Established e-commerce retailers are focusing on enhancing their logistics to be able to adequately respond to increasing customer growth and demand. In June 2020, AEON launched their online delivery service to retain customers during pandemic related restrictions. In less than a year, responding to positive growth rates, this omnichannel brand is anticipated to launch a digital shopping platform in collaboration with Boxed, where 16 fulfilment centres will be operated through robotics and AI technology to better manage orders.

- With more online shoppers actively looking for healthier products, sustainable and organic online grocery retailers are reporting an increase in their market shares. During 2020, Everleaf Eco Solutions, an e-tailer that focuses on sustainable sourcing, has witnessed a 300% boost in user traffic.

Key E-tailers:

- Popular omnichannel retailers with huge online grocery customer bases include Mydin, Jaya Grocer and Tesco Groceries.

- Bungkusit and GrabMart, both on-demand delivery platforms, are becoming increasingly popular as grocery delivery services.

- HappyFresh dominates as the top online grocery platform. The brand offers customers access to many major supermarkets through personal shoppers. Nevertheless, both Lazada and Shoppee top the overall e-commerce market.

Source: Euromonitor

Seafood Consumption in Malaysia

- Fish and seafood supply per person in Malaysia is valued at 57.62 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 a 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:

- Food Safety and Quality Division (FSQD): Enforces laws to do with food safety.
- Islamic Development Foundation of Malaysia (JAKIM): Coordinates policies concerning Islamic principles.
- Malaysian Quarantine and Inspection Services (MAQIS): Inspects products that are from overseas.

Product Registration/Import Procedure:

- An import permit from MAQIS is required before importation for all prant products. A phytosanitary certificate and pre-shipment treatment might also be required for certain plant-based products.
- Barring pork products, all meat products must have halal certification before being imported. Slaughterhouses in the origin country must have been checked and approved by DVS and JAKIM. Islamic centres will also be appointed to inspect the slaughterhouses to ensure that halal standards are being adhered to.
- A veterinary health certificate from a veterinary authority must be obtained by exporters, while importers must apply for an import license.
- For pork products, exporters must make sure that all slaughterhouses are DVS approved.
- Foreign exporters must ensure that all milk and egg products must be halal certified before importation.

Documentation Required:

- The following documents are generally required to facilitate the import process:
  - Custom entry form
  - Bill of Lading
  - Commercial invoice
  - Packing list
  - Country of Origin
  - Permit, licenses/certificates
  - Proof of fare payment

General Labelling Requirements:

- Labels may either be printed in Bahasa Malaysia or English. A translation of either language can be provided. The label must include:
  - A specific name or description of the food: The common name of its main ingredients must also be visible.
  - Country of Origin
  - List of ingredients: If there are two or more ingredients, they must be listed in descending order by proportion of weight.
  - Instructions for use
  - Expiry date
  - Packer's name and business address
  - Importer's name and business address
  - Minimum net weight, volume or number of the content of the package
  - Presence of hypersensitive ingredients, food additives, edible fat or oil
- All details must be displayed prominently on the label with minimum 10-point lettering.
- The label must be legible (colour, size, style) and permanently attached to the package.

Packaging Requirements:

- Packaging must protect from any deterioration of the food product and or anything that might make the product unsafe for consumption. Enamel and glazed earthenware are banned from being used for the transportation of the product if the food might be exposed or contaminated with any toxic substances.
- Packaging that is rigid or semi-rigid and is constructed of PVC cannot be used if it contains more than 1mg/kg of vinyl chloride monomer.
- In case of sugar/flour/meal sacks, plastic bottles, edible fat containers and packaging of swine origin, recycled packaging cannot be used.

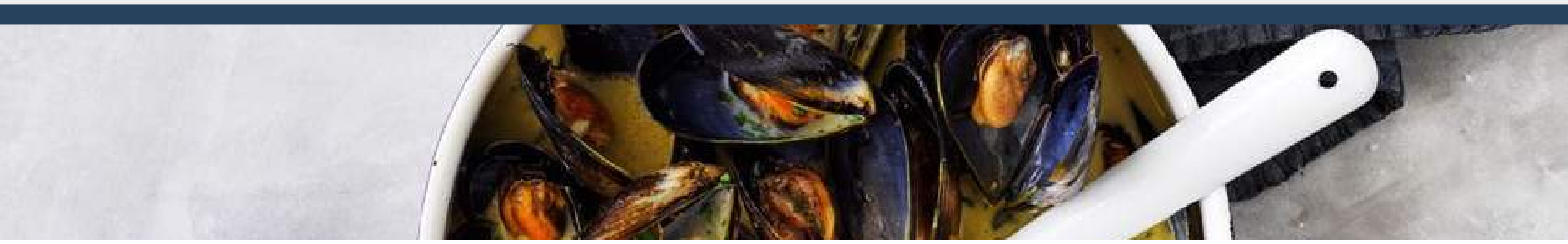
Non-Tariff Barriers:

- Random sampling at one of the 28 entry ports may be done to check that imported products are in compliance with regulations. All veterinary inspection of meat, dairy and pork products is done by MAQIS. If the product fails the initial inspection, random samples will be taken and sent for laboratory testing.

Tariffs Levied:

- Tariff rates are levied according to the product category and range from 0 to 50%. Pork based products, alcohol, and domestically produced goods have a higher tariff rate levied on them.

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



Category Data

Fish and Seafood in Malaysia

Key Trends:

- Fish and seafood market revenue reached US$5.28 billion in 2022, with the market expected to grow at a CAGR of 6.76% over the next five years through to 2027. Per person, fish and seafood revenues rest at US$159.23, with this figure higher in coastal and rural rather than urban areas. These figures make Malaysia the highest per capita consumer of fish in the ASEAN region.

- In the Malaysian diet, fish and seafood is the prime animal protein source, making up approximately 35% of total animal protein consumed compared to meats like chicken and eggs, which comprise 26.8% and 17.9% of total protein intake, respectively. 87% of consumers eat seafood at least once a week while 45% eat it at least twice a week.

- Consumers display a preference for wild caught marine pelagic fishes, which are believed to be superior in quality, where demand is largely satisfied by imports despite increasing local fishing efforts in recent years. Malaysians also generally prefer imported seafood due to higher quality perceptions.

- Despite an increase in the number of fishing licenses in recent years and the economy's dependence on the sector, fish stock is declining and the local catch fails to satisfy demand. In 2019, Malaysia's fisheries department revealed Malaysia has lost 96% of its demersal fish stock in less than 60 years as a result of overfishing, unreported and unregulated fishing.

- Luxury fish and seafood market opportunities are growing in Malaysia for products such as abalone, blue fin tuna, caviar and rock lobster. Abalone is a highly valued seafood product, especially in Asia. Abalone is in high demand among Malaysia's Chinese population of approximately 24%, and especially in high-end restaurants and hotels. It's traditionally served on special occasions as a symbol of wealth and prosperity. Canned and dried abalone are also popular in Malaysia.

- The demand for sustainably caight fish and seafood products in Malaysia is growing. According to a report by the Norwegian Seafood Council, approximately 78% of the Malaysian population believed sustainably fishing was very important to them.

- In line with the rising interest in plant-based protein products, brands such as Pacific West have launched plant-based products lines in Malaysia, including fishless fingers.

- Segment revenue via e-commerce channels is projected to reach US$17 million in 2022, with an annual CAGR of 13.05% to 2025 outpacing overall industry growth.

- The most consumed fish products include Indian mackeral, anchovy, scads, tuna, sardines as well as fresh salmon.

- A majority 78% of consumers prefer to consume seafood at home while 29% choose to eat out, a trend which distinguishes the Malaysian population from other countries where seafood consumption via foodservice channels is more prevalent.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	Malaysia	2021	229.86	4.22
			2026	285.16	4.41
	Chilled Raw Packaged Fish & Seafood - Processed	Malaysia	2021	738.00	4.77
			2026	908.51	4.25
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	Malaysia	2021	427.86	4.77
			2026	537.64	4.67
	Dried Fish & Seafood	Malaysia	2021	403.18	5.09
			2026	515.67	5.04
	Fresh Fish & Seafood (Counter)	Malaysia	2021	655.24	4.19
			2026	803.29	4.16
	Frozen Fish & Seafood	Malaysia	2021	1,046.51	7.33
			2026	1,430.10	6.44

Source: GlobalData, 2021

ITC - Trade Data

Live, Fresh or Chilled, Even in Shell, Abalone in Malaysia

Malaysia - Trade Data - HS Code 030781 Live, fresh or chilled, even in shell, abalone "Haliotis spp." (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	89	2	-52	55	-28
1	South Africa	68	1	-13	-	0
2	Australia	10	0	-87	-	-
3	South Korea	8	0	-74	-	-
4	Japan	3	0	-	-15	-
5	Hong Kong	1	0	-	-53	-
6	China	-	-	-	-	-
7	New Zealand	-	-	-	-	-
8	Bulgaria	-	-	-	-	-
9	Chile	-	-	-	-	-
10	Taiwan	-	-	-	-	-

AUS - Trade Data - HS Code 030781 Live, fresh or chilled, even in shell, abalone "Haliotis spp." (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	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	41,835	886	-29	-10	-10
1	China	36,341	763	-28	11	12
2	Hong Kong	2,975	65	-33	-42	-42
3	Japan	1,158	29	-56	-13	-17
4	Vietnam	609	13	303	-62	-61
5	Taiwan	300	7	-47	-21	-25
6	Singapore	248	4	128	-16	-10
7	USA	150	4	98	39	41
8	Canada	25	1	-	-	-
9	Malaysia	14	0	-72	-22	-
10	Macao, China	8	0	-	-	-

Source: ITC Trade Map, 2022

ITC - Trade Data

Smoked, Frozen, Dried, Salted or in Brine, Abalone in Malaysia

Malaysia - Trade Data - HS Code 030789 Smoked, frozen, dried, salted or in brine, abalone "Haliotis spp.", even in shell (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	621	443	-58	15	81
1	China	555	440	-17	26	118
2	Australia	38	1	-31	-17	-13
3	Japan	14	1	66	83	-
4	Indonesia	6	0	205	-	-
5	Hong Kong	4	1	-99	-34	4
6	South Africa	2	0	-92	-22	-
7	France	1	0	-	-	-
8	South Korea	-	-	-	-	-
9	Singapore	-	-	-	-	-
10	Philippines	-	-	-	-	-

AUS - Trade Data - HS Code 030789 Smoked, frozen, dried, salted or in brine, abalone "Haliotis spp.", even in shell (Export):

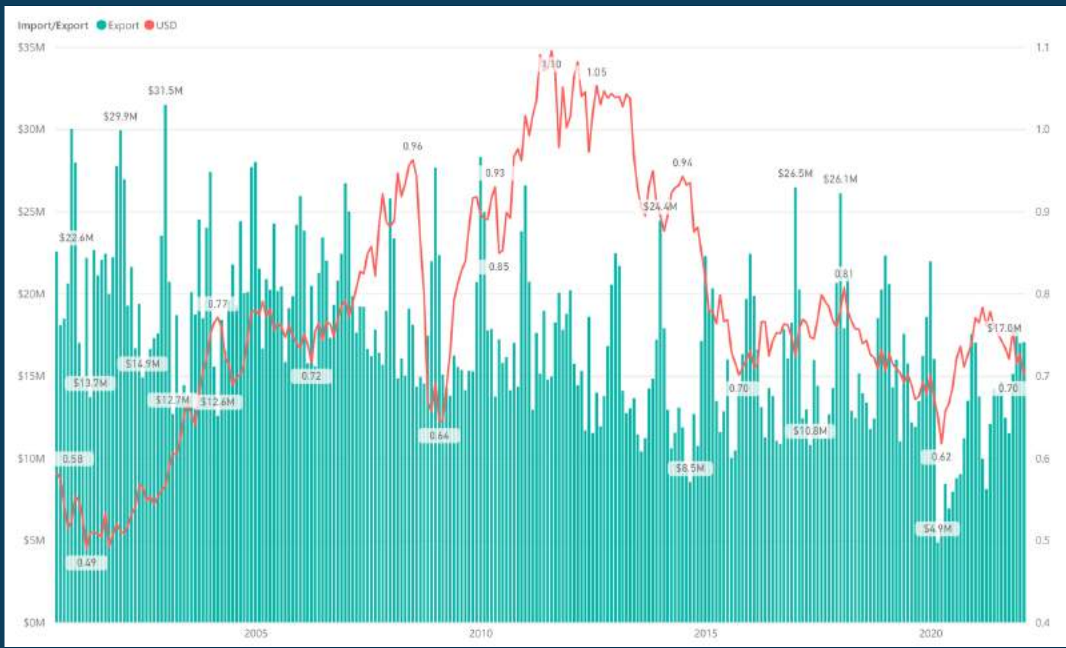
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '19 - '20)	Annual Growth Exported Value % (Long Term '16 - '20)	Annual Growth Exported Quantity % (Long Term '16 - '20)
-	World	33,187	560	-24	-8	-9
1	Hong Kong	13,140	119	-17	-13	-18
2	USA	7,393	164	123	19	20
3	China	4,168	41	-40	59	35
4	Japan	3,559	87	-46	-11	-14
5	Singapore	2,255	86	-71	-24	-15
6	Taiwan	1,309	29	60	18	22
7	Canada	632	8	-48	-29	-39
8	Vietnam	291	8	81	-50	-42
9	Malaysia	162	3	-67	-19	-21
10	Macao, China	161	3	-21	-11	8

Source: ITC Trade Map, 2022

FRDC - Trade Data

Abalone Exports - Value

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



Value of Exports - Abalone

Commodity Description	Value
Live, fresh or chilled Abalone	$973,121,138
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	$790,822,595
Prepared or preserved abalone (excl. abalone of Chapter 03)	$693,355,916
Prepared or preserved abalone	$471,499,012
Frozen abalone meat	$353,723,465
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$291,371,852
Abalone, frozen, dried, salted or in brine (excl. frozen meat; frozen whole on shell; dried meat; whole parboiled; prepared or preserved of Chapter 16)	$228,249,493
Frozen abalone (Haliotis spp.), whether in shell or not	$191,843,655
Prepared or preserved abalone, in cans, bottles or the like	$170,294,276
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$108,812,031
Parboiled whole abalone	$83,774,426
Frozen whole abalone, on shell	$71,931,490
Dried abalone meat	$24,117,292

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	$2,050,604,342
China	$701,533,841
Japan	$653,876,264
Singapore	$478,726,410
Taiwan	$207,488,202
Vietnam	$131,618,674
United States of America	$115,067,868
Canada	$52,219,281
Malaysia	$39,011,721
United Kingdom	$6,370,224
Macau	$3,180,400
Thailand	$2,974,216

Leading Export Destinations - Value

State	Value
TAS	$1,842,980,289
VIC	$1,369,562,186
SA	$900,256,919
WA	$183,473,616
NSW	$103,763,545
QLD	$45,251,813
Foreign (re-export)	$7,494,950
NT	$133,323

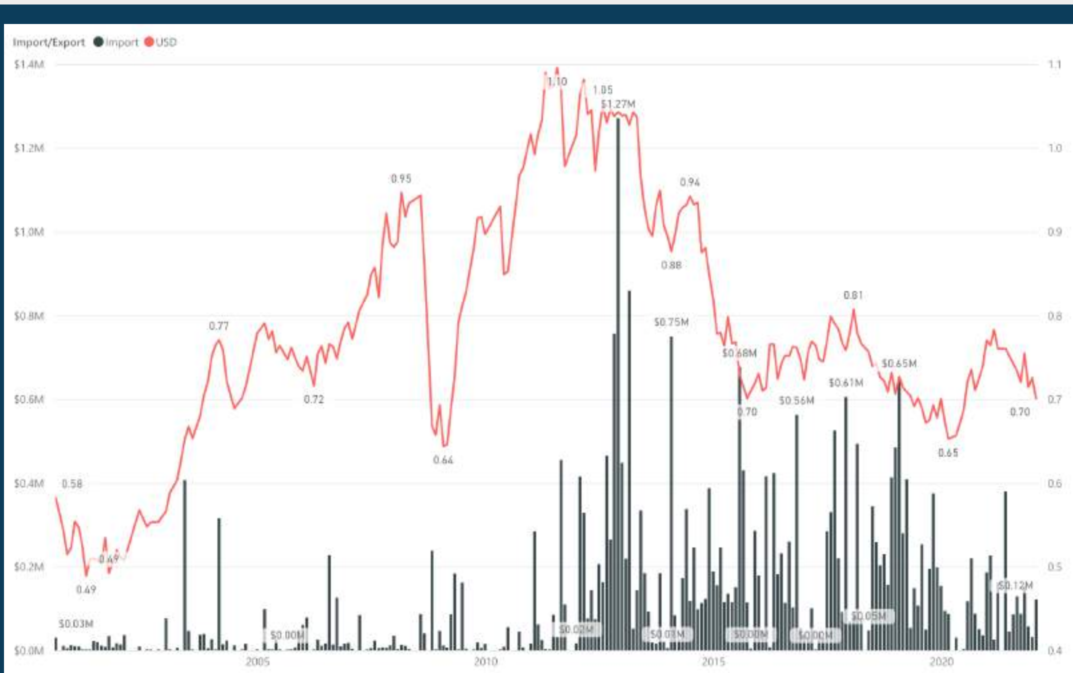
Export Value by State

Source: FRDC, 2021

FRDC - Trade Data

Abalone Imports - Value

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



Value of Imports - Abalone

Commodity Description	Value
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	$13,442,420
Prepared or preserved abalone (excl. abalone of Chapter 03)	$7,383,537
Abalone, frozen, dried, salted or in brine	$4,428,848
Frozen abalone (Haliotis spp.), whether in shell or not	$2,035,968
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	$1,489,162
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brin	$505,345

Value of Imports - Commodity Breakdown

Country	Value
New Zealand	$15,287,380
China	$5,763,505
Hong Kong	$1,999,403
Australia (Re-Imports)	$1,933,445
Malaysia	$669,774
Australia	$644,679
Morocco	$617,708
Taiwan	$555,563
Chile	$550,177
Japan	$335,802
Singapore	$323,984
Korea Republic of	$211,956
Vietnam	$128,967

Leading Import Sources - Value

State	Value
SA	$9,395,997
QLD	$9,218,029
VIC	$7,222,577
NSW	$2,235,082
WA	$818,984
TAS	$394,611

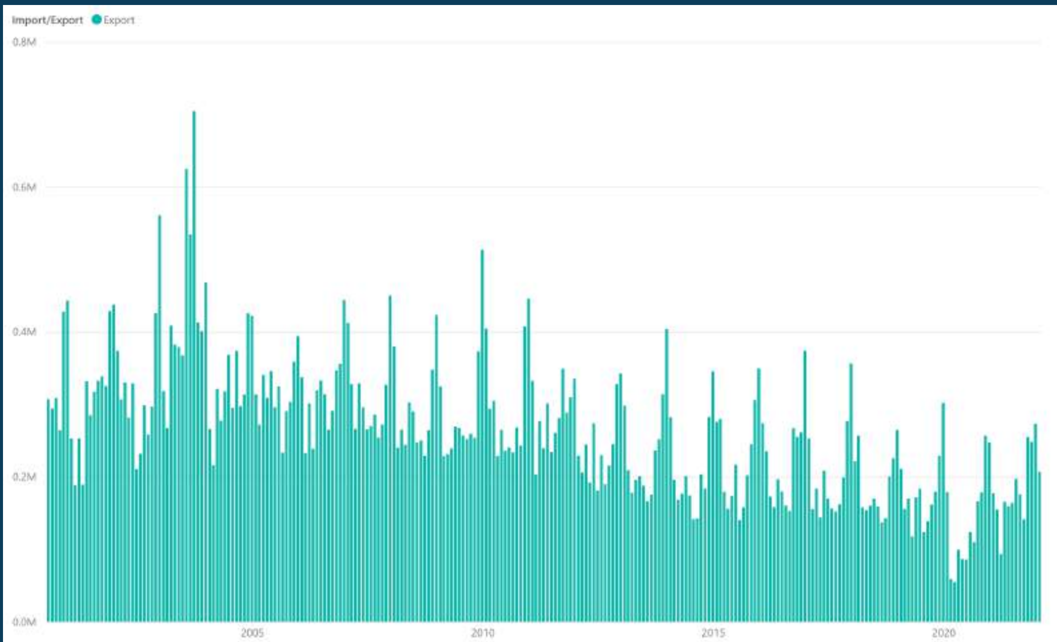
Import Value by State

Source: FRDC, 2021

FRDC - Trade Data

Abalone Exports - Volume

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



Volume of Exports - Abalone

Commodity Description	Quantity
Live, fresh or chilled Abalone	19,043,006
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	12,154,431
Prepared or preserved abalone (excl. abalone of Chapter 03)	9,579,167
Prepared or preserved abalone	8,913,000
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	3,724,277
Abalone, frozen, dried, salted or in brine (excl. frozen meat; frozen whole on shell; dried meat; whole parboiled; prepared or preserved of Chapter 16)	3,307,129
Frozen abalone meat	2,898,584
Prepared or preserved abalone, in cans, bottles or the like	2,444,460
Frozen abalone (Haliotis spp.), whether in shell or not	2,145,155
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	1,461,278
Frozen whole abalone, on shell	1,360,525
Parboiled whole abalone	1,310,345
Dried abalone meat	89,454

Volume of Exports - Commodity Breakdown

Country	Quantity
Hong Kong	30,719,587
Japan	10,762,587
China	10,134,579
Singapore	7,320,067
Taiwan	3,887,093
Vietnam	2,145,906
United States of America	1,791,132
Malaysia	632,318
Canada	573,342
New Zealand	108,555
United Kingdom	93,150
Thailand	51,964

Leading Export Destinations - Volume

State	Quantity
TAS	30,479,240
VIC	22,028,429
SA	10,797,455
WA	2,258,355
NSW	2,027,087
QLD	706,755
Foreign (re-export)	132,707
NT	783

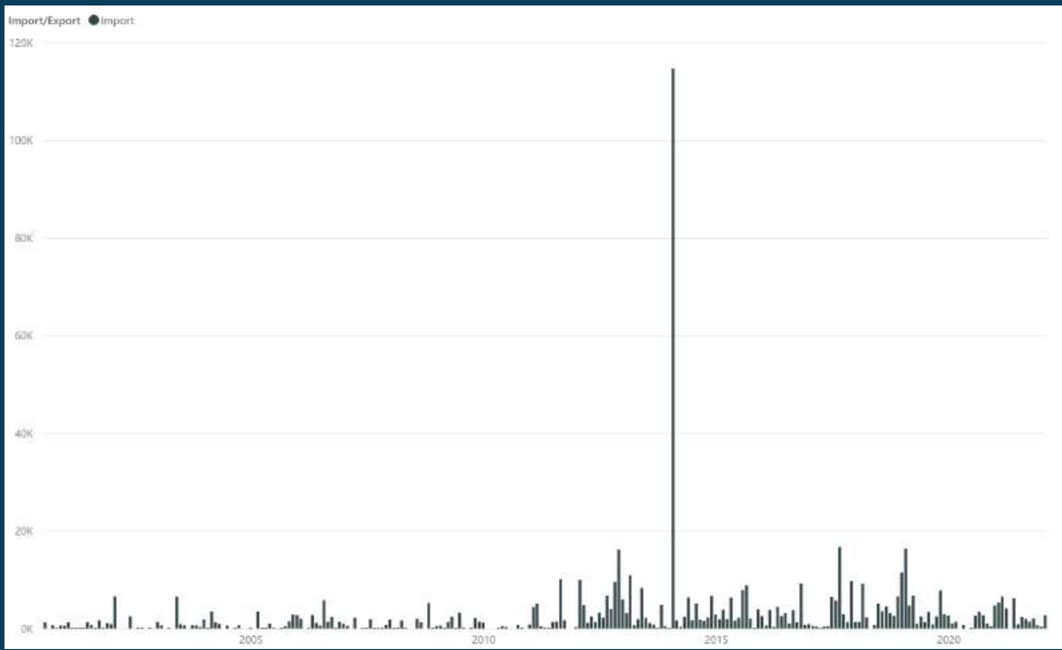
Export Volume by State

Source: FRDC, 2021

FRDC - Trade Data

Abalone Imports - Volume

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



Volume of Imports - Abalone

Commodity Description	Quantity
Prepared or preserved abalone (excl. abalone of Chapter 03)	256,451
Live, fresh or chilled abalone (Haliotis spp.), whether in shell or not	192,301
Abalone, frozen, dried, salted or in brine	130,965
Frozen abalone (Haliotis spp.), whether in shell or not	46,063
Albalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brine or smoked, whether or not cooked before or during the smoking process	24,950
Abalone (Haliotis spp.), whether in shell or not, frozen, dried, salted, in brin	6,537

Volume of Imports - Commodity Breakdown

Country	Quantity
New Zealand	228,037
China	217,861
Hong Kong	41,895
Malaysia	30,544
Australia (Re-Imports)	27,459
Chile	22,015
Taiwan	19,205
Morocco	13,668
Vietnam	12,935
Australia	10,719
Thailand	8,382
Singapore	5,538

Leading Import Sources - Volume

State	Quantity
QLD	285,456
VIC	144,312
SA	134,747
NSW	71,591
WA	15,081
TAS	6,080

Import Volume by State

Source: FRDC, 2021

FRDC - Trade Data Sourced from FAO

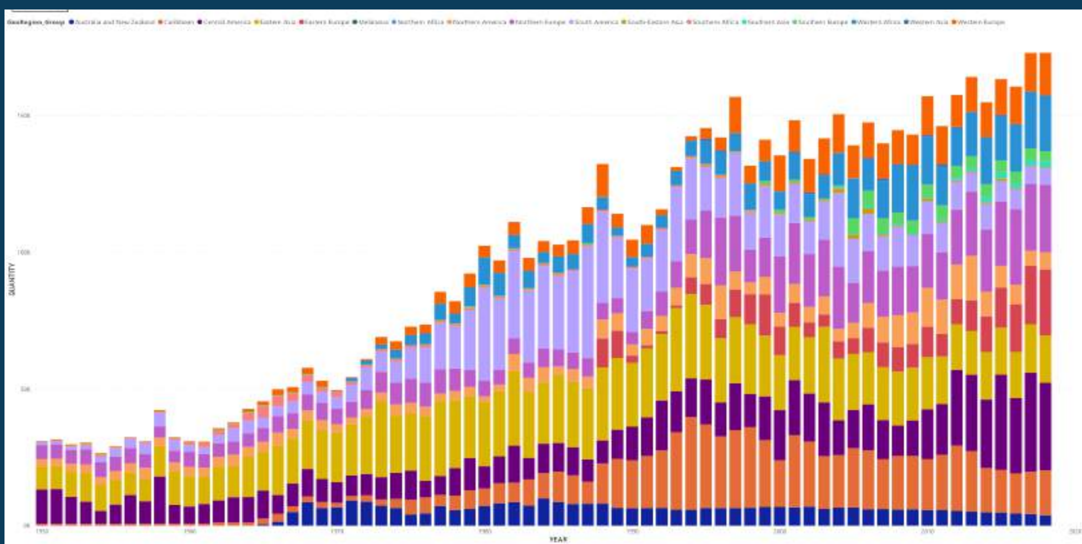
Food and Agriculture Organization (FAO) Capture Production Quantity - Abalones, Winkles, Conchs

ISSCAAP Species: Abalones, Winkles, Conchs — Production

Country Name En	Unit Name	2019
Australia	Tonnes - live weight	2 728

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

Austrade - Malaysia Market Profile

DFAT - Malaysia Country Brief

DFAT - Malaysia Market Insights

Enterprise Singapore - Malaysia Market Profile

Food Export - Malaysia Country Profile

HKTDC Research - Malaysia Market Profile

Santandar Trade Markets - Malaysia Market Overview

USDA - Malaysia Exporter Guide

CONSUMER INSIGHTS

Euromonitor International - Consumer Lifestyles in Malaysia

GWI - APAC Consumer Snapshot

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Malaysia Foodservice Profile

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

International Trade Centre - Market-Specific Trade Data

USDA - Malaysia Foodservice Overview

USDA - Malaysia Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - Malaysia Investment Policy Hub

USDA - Malaysia 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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