UAE 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): **421.14**
- GDP per capita (USD): **$36,284**
- Currency: **AED** (United Arab Emirates Dirham)
- Exchange Rate: 1 AED = **0.37 AUD** (17/03/2022)
- Mercer's 2019 Quality of Living Ranking (2020 report not released due to COVID-19): Dubai - **74th**
- Human Development Index: **0.890** and ranked **31st**
- Logistics Performance Index: **3.96** and ranked **11th**
- Ease of Doing Business Rankings: **16th**

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - The UAE is a signatory in the Gulf Cooperation Council (GCC) alongside Kuwait, Oman, Bahrain, and Saudi Arabia.
  - The UAE has been a member of the WTO since April 1996.
  - The UAE maintains over 30 Bilateral Investment Treaties (BITs).
  - The UAE does not maintain a FTA with Australia.

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

Demographic Indicators

- Total Population (million): **9.80**
- Expatriate Population (million): **8.45**
- Population Growth: **1.4%**
- Median Age: **33.5**
- Urban Population: **86.0%**

- **Population Ethnicity:**
  - South Asian (i.e. Pakistan, India, Bangladesh, and Sri Lanka): 58.5%
  - Emirati: 16.5%
  - Other Asian Regions (i.e. Iranian, Filipino): 16.5%
  - Western Expatriates: 8.5%

- **Dominant Religious Groups:**
  - Islam: 76%
  - Other (Hinduism, Buddhism, Sikhism and Judaism): 15%
  - Christianity: 9%

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

Consumer Behaviour & Societal Trends

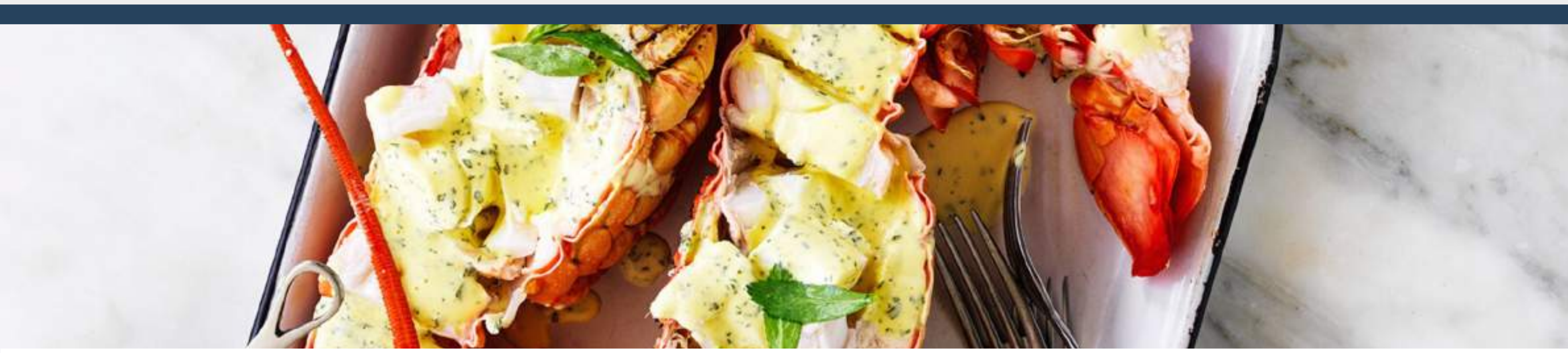
Key Trends:

- As the UAE is unable to meet the demand for agri-food products with domestic production, it relies heavily on imports; approximately 90% of its food requirements are noted to be imported.
- A high level of internationalisation by default has created demand for imported food; affluent foreign residents, in particular, are driving demand for international food products.
- High levels of urbanisation and increasingly hectic lifestyles has created growing demand for convenient food solutions.
- Increased nutritional awareness among both UAE nationals and expatriates alike has driven demand for a range of different food products, including organic and functional.
- Grocery shopping is carried out on a weekly basis, transforming into a family-oriented experience for UAE consumers. These outings are primarily carried out in hypermarkets and supermarkets, with each format accounting for 55% and 23% respectively of total grocery sales in 2019.
- A survey carried out by the Glasgow Consultancy Group in Dubai found that women influence 80% of all purchasing decisions.
- UAE consumers commonly travel to city centres or malls to carry out grocery shopping.
- Rapid urbanisation combined with busy lifestyles continue to generate demand for convenience. Consumer preference for modern retail outlets continues to grow within the UAE.
- These modern retail outlets are preferred due to their wider assortment of products, cleaner and more-open spaces, and the availability of offers and promotions. All of which cultivates the family-oriented shopping experience.

Digital Adoption:

- The wide use of social media has resulted in the considerable proliferation of UAE 'influencers' who tout a wide range of products and brands to eager consumers.
- On average, UAE consumers spend 8 hours and 36 minutes on the internet and just over 3 hours on social media.
- WhatsApp was used by 87.4% of UAE consumers, followed by Facebook (81.6%) and Instagram (77.5%).
- According to the 'Digital in 2022 Report', the UAE maintains an internet penetration rate of ~99%; approximately 9.94 million individuals leverage the internet.
  - The UAE has 10.65 million active social media users; a penetration rate of 106.1%

Source: Digital in 2022 Report



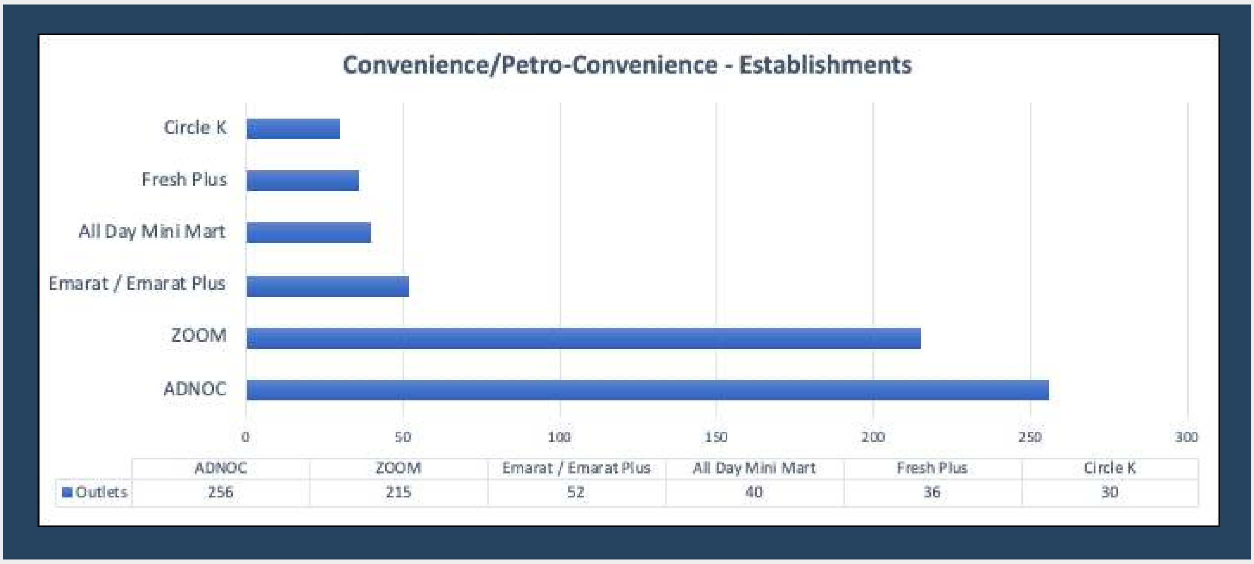
Grocery Retail Channel Developments

Key Trends:

- Increasingly, grocery retailers are establishing dedicated sections and shelf spacing for healthy and organic food products; Carrefour has redesigned several locations to include a dedicated store section - Carrefour's Healthy Kitchen.
  - In 2018, this section was expanded across more outlets, offering over 2,500 healthy products across organic, diet, free-from, and fitness items at competitive prices.
- Traditionally, healthy alternatives fell into the premium grocery channel, however, hypermarkets and supermarkets in the UAE have addressed rising demand by offering budget-friendly health foods.
  - Promotions have played a significant role in the success of hypermarkets over the review period; Union Co-operative Society announced that it had allocated USD 31 million to launch over 40 promotional campaigns in 2018 - an increase of 74% from the previous year.
  - Similarly, Carrefour has been quite aggressive over the review period, culminating in the launch of a new policy in 2018 whereby they would refund customers the equivalent of 20 times a product's cost in loyalty points if the customer finds the product cheaper at one of its competitors; this tactic is part of Carrefour's strategy to cultivate a reputation as being the least expensive retailer in the United Arab Emirates for household staples.
- Hypermarkets continue to dominate value sales across the UAE's grocery retail sector over the review period; led by Carrefour, Lulu Hypermarket, and Union Co-op.
- Dubai remains the launch pad for regional expansion, ranking number one in overall international retailer presence with over 62% of the world's brands maintaining a presence in-market.
- Smaller emirates such as Ajman and Sharjah maintain a higher proportion of traditional grocers to modern grocery retail outlets due to the subdued presence of modern grocers.

Grocery Retailing Brand Outlets:

Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor

Foodservice Channel Developments

Key Trends:

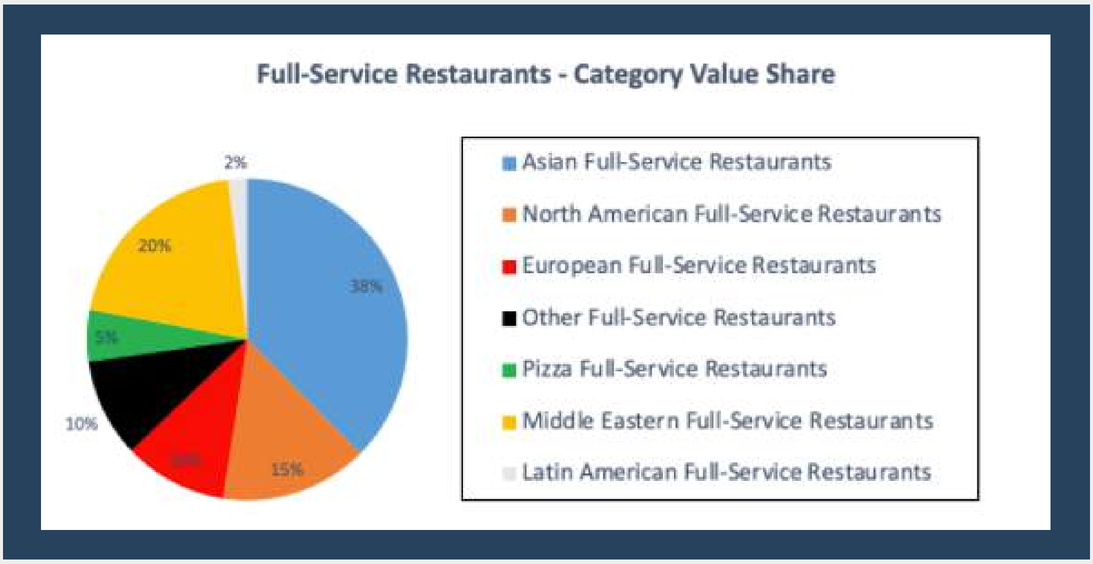
- Foodservice operators continue to struggle in a dampened economic environment; reporting marginal growth and struggling to manage the new tax processes that were introduced in 2018.
- While tourist inflows continue to be a major revenue generator for market players, a shift in the global economic environment has led many consumers to control their expenditure.
- The advent of COVID-19 is expected to close down in excessed of 11,000 foodservice outlets across Dubai alone, with some 40 - 50% of all foodservice outlets being expected to downsize, restructure, or otherwise shut down their operations.
- The UAE's competitive landscape continues to evolve as an increasing number of full-service restaurants, cafe's, and QSRs introduce online-ordering and home-delivery via aggregated delivery platforms. COVID-19, has, however, decimated tourist numbers, and led to a significant decline in foodservice footfall across the UAE.
- Health and wellness continues to guide the market offerings of new and existing foodservice operators. An increasing number of market entrants have positioned themselves as specialty food providers, presenting organic juice, alternative milk, and cleansing offerings into the UAE market.
- Foodservice operators are embracing the health- and body-consciousness of UAE consumers; market players have begun to introduce healthier variants into their menus, presenting low-calorie, whole grain, gluten- and dairy-free options.
- Multi-channel independent foodservice providers have largely outperformed chained operators; their ability to leverage online platforms and innovate across their menus have set them apart from their reactive chained counterparts.

- Middle Eastern full-service restaurants continue to outperform their counterparts in both chained and independent markets. Full-service restaurants remain largely fragmented in the UAE, with the majority of value sales being attributed to independent market players; offering lower-priced menu items and leveraging online platforms to increase their reach across the gulf nation.

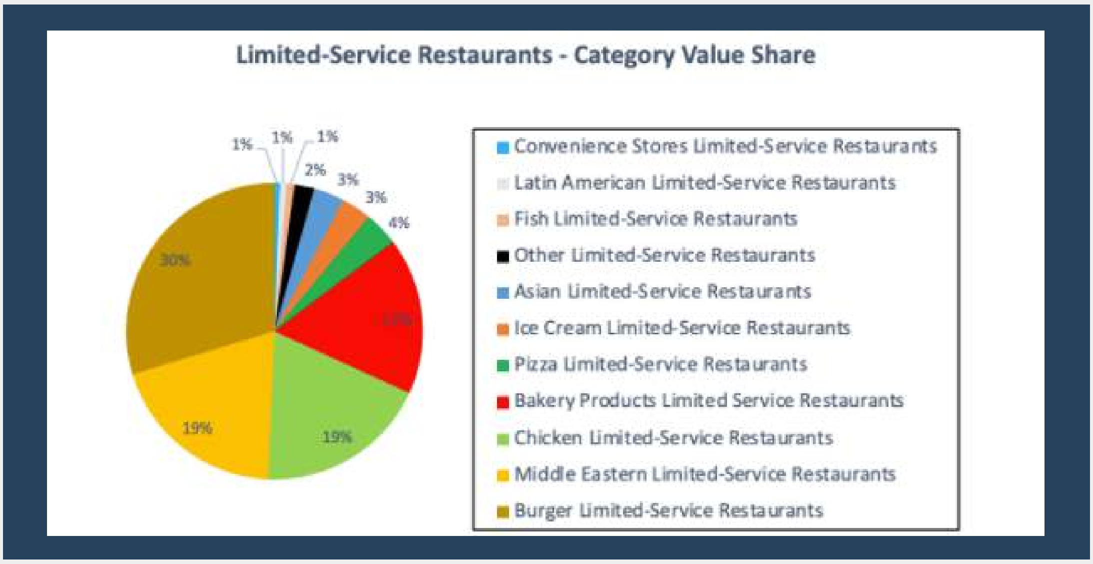
- Across full-service restaurants, Asian restaurants continue to maintain a leading position with over USD 3 billion in value sales; these restaurants are able to offer highly affordable food that is appealing to low-to middle-income consumers, blue-collar workers, and expatriates.

- Fine dining restaurants are expected to face intensifying market conditions, with compromised margins over the forecast period. Consumers in the UAE are noted to be shifting towards casual dining options over fine dining experiences.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Internet retailing is experiencing milestone developments; 2017 was a key year for the country's internet retailing landscape as Amazon completed its acquisition for the region's leading internet retailer souq.com, thus making an entry into the fast-changing e-commerce landscape in the region.

- Internet retailing for food and beverages is a highly dynamic, albeit small channel, recording a CAGR of 28% between 2014 - 2019. Online grocery shopping has been trending recently, especially among young professionals, as the sector has developed, and the offer improved to include fresh items.

- Although still in its infancy, non-store retailing has increased by 202% between 2014-2019.

- E-commerce, and particularly mobile commerce have become more popular since the onset of COVID-19, with 42% of consumers buying items online at least weekly.
  - E-commerce was the only channel to see significant growth in 2021.
  - Demand for subscription services such as meal boxes spiked while in lockdown.
  - When shopping online, key priorities include getting the best price and free shipping.
  - The future of retailing will be increasingly online. This is supported by the UAE's global rank as 4th on the Digital Consumer Index, however there is still a great deal of unmet e-commerce potential.
  - Online retailers offer cash on delivery options to encourage e-commerce.
  - The consistent growth of e-commerce has reduced store-based retailer profits due to the competitive prices offered online, which will likely continue into the future as retailers focus on developing robust omnichannel strategies.

Key E-tailers:

- Initially, pure players such as Supermart and Trolley were leading food and drink internet retailing. As of 2019, almost every major grocery retailer has incorporated online grocery shopping into their strategy, whether that be by developing an online platform, or by partnering with a third-party service such as elGrocer or InstaShop.

- Carrefour and Lulu continue to lead grocery retailers across the UAE's internet retailing channel, while Supermart and Trolley offer strong competition as pure players.

- Omnichannel retailing is rapidly transforming the UAE's retailing sector, with grocery retailers adopting this format over the review period; Emke Group's Lulu brand was one of the first innovators in this space, offering click and collect across their outlets; this model is highly convenient and popular amongst working professionals who may work during the day and collect their groceries in the evenings.

- While e-commerce has taken off, footfall and occupancy in major shopping centres had not experienced any stagnation prior to COVID-19. Given the unique conditions of the UAE, the retail landscape will continue to see a coexistence of mega shopping centres, and e-commerce.

Source: Euromonitor

Seafood Consumption in the UAE

- Fish and seafood supply per person in the UAE is valued at 24.71 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:

- GCC's Standardisation Organisation (GSO): GSO was established by GCC member countries as a mechanism for developing food and non-food standards. GSO technical regulations and standards are the primary reference point for food imports into the gulf region.
- Dubai Municipality: The Dubai Municipality is responsible for import, export, and consignment release. The Municipality also plays a key role in regulating consumer product safety, food safety, lab testing, and accreditation.
- UAE Ministry of Economy: The Ministry of Economy is responsible for the regulation of the UAE's import/exporting environment, and for the development and promotion of the UAE's investment environment among other business and trade activities.
- Ministry of Climate Change and Environment: The Ministry of Climate Change and Environment govern much of the UAE's food and beverage markets. They set out laws and legislations to import and regulate agriculture, animal wealth, fisheries, and other relevant categories.
- Emirates Authority for Standardization and Metrology (ESMA): ESMA is a federal Emirates authority charged with formulating and issuing national standards. ESMA is responsible for a range of standards and is the authority overseeing the UAE System for the Control of Halal Products.

Product Registration/Import Procedure:

- In 2018, the "National Scheme for Food Accreditation and Registration" was introduced in the UAE; this electronic food registration portal, also referenced as "ZADI", enrols all food items prior to sale in the UAE and verifies product compliance.
- Importers will need to register with the Dubai Municipality Food Safety Department and Dubai Trade with a valid Dubai Customs Importer Code. Once registered users can access ZADI through Dubai Trade.
- Users on Zadi can undertake food import requests, food import requests for re-export, register food items, obtain assessment for food labels, apply customs declarations, and search for food items. Note: Direct food importers most deposit a payment of AED 15,000 as a deposit for the importation of an unlimited number of consignments.
- Once registration of a product is approved, the importer will receive a product registration certificate through the ZADI website, which allows them to apply for an import permit - bringing their shipments through any port in the UAE.

Documentation Required:

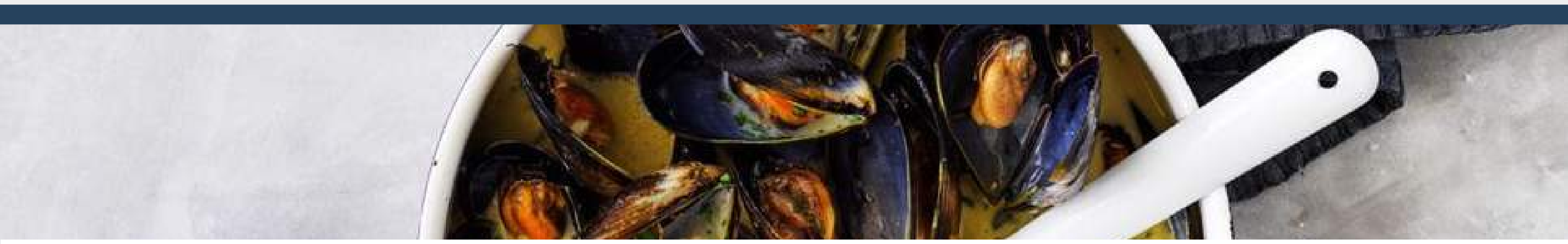
- Bill of entry/airway bill
- Delivery order from the shipping or line agent
- An original health certificate approved by DAWR
- Certificate of origin
- Consignment packing list
- An original halal certificate issued by an Islamic Organisation which is approved by UAE authorities
- A valid trade license copy
- Original supplier's commercial invoice

General Labelling Requirements:

- Labels for imported goods/food must have the following standard information in both English and Arabic (can be stickered onto the packaging):
- Product name
- Ingredients in descending order of proportion
- Additives; the name of the additives or E-number must be declared alongside the group name of the additive
- Net weight/contents in metric units
- The name and address of the manufacturer, producer, distributor, importer, exporter, or vendor
- The country of origin
- Expiry dates, special storage, and preparation instructions
- Allergy information on ingredients (if any)
- Lot identification
- The source of animal fats (beef, buffalo, etc.)
- Foodstuffs and ingredients which are known to cause hypersensitivity
- Barcode
- Irradiated food

Packaging Requirements:

- Packaging of goods should be made to protect against extreme heat and humidity, and storage in the open.
- Outer containers are required to bear the consignee's mark, and port mark in Arabic - a requirement as the majority of wharf labourers are not able to read English.
- A detailed packing list highlighting the weight, method of packing, and the HS codes of each individual article contained in the shipment is required.
- Packaging and wrapping materials should be strong, sound, and hygienic and must not cause any alteration in meat properties.



Certificate Requirements:

- Halal Certification: Any halal claims must be accompanied by an original Halal Product Certificate.
    - Recognised Islamic bodies for Halal certification varies from market-to-market; the following are examples of Halal certification bodies operating out of Australia that are recognised by ESMA:
        - Halal Certification Authority (HCA)
        - Islamic Coordinating Council of Victoria
        - Supreme Islamic Council of Halal Meat in Australia (SICHMA)
- Certificate of Origin: As highlighted by Austrade, a certificate of origin stating that the goods or materials are of Australian origin is required for consignments to be cleared at customs. The Australian Arab Chamber of Commerce & Industry is authorised to issue documentary evidence of origin by the Australian Chamber of Commerce & Industry.
- Bill of Lading: The appropriate tariff classification number should be shown - to ensure that the correct freight rate is applied to the shipped items.
    - Two original copies must be provided at the minimum.
    - Original bills must be provided if the ladings have to be endorsed by the shipper. If no endorsement is required, a full set of originals would have to be handed to the line.

Non-Tariff Barriers:

- Import controls exist for specific food and beverage product categories such as alcoholic beverages, pork and pork-based products, and medicinal substances.
- In order to export in the UAE, companies must align themselves with partners that have the appropriate trade licences.

Tariffs Levied:

- As of January 1st, 2018, a 5% Value Added Tax rate has been included on the sales of various services and products with the exception of education, healthcare, and certain food essentials. The government claims that the implementation of the VAT is part of its larger macroeconomic plan to support GDP growth.
- The UAE Cabinet has applied a 50% Excise Tax on Sugar Sweetened Beverages ("SSBs") and a 100% Excise Tax on energy drinks.

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

Category Data

Fish and Seafood in the UAE

Key Trends:

- Despite the impact of COVID in 2019/20, population growth, tourism, and convenient food options have all contributed to strong growth within the UAE's fish and seafood category over the review period.
    - The country continues to invest heavily in modernising its trading infrastructure to position itself as a global commercial hub and accommodate a higher number of traders efficiently.
    - Part of this investment is focused on fishing fleets and equipment; with the UAE being situated along the Arabian Gulf, there is much interest in further improving this the capabilities of what was once a prominent fishing nation.
    - UAE consumers continue to be the highest consumers of fish among all GCC countries, with the Minister of State for Food Security claiming that residents in the UAE consume approximately 25.3kg of fish annually per capita – 20% more than the global average.
    - For fresh food categories such as fish, meat, vegetables and fruit, the key attributes highlighted by Euromonitor include freshness, nutritional value, and health-boosting claims.

- Prior to COVID-19, foodservice was a rapidly growing channel for fish and seafood players.
    - COVID-19 is noted to have decimated value sales growth for foodservice players in the region, with 40 - 50% of all foodservice outlets being expected to downsize, restructure, or shut down in the UAE.
    - Southeast Asians, in particular, are highlighted as a key consumer of seafood across the UAE's foodservice channel.
    - From a retail volume perspective, Euromonitor estimates 54.3% of total volume across the UAE's fish and seafood category is made up of packaged seafood, while 45.7% of total volume is made up of unpackaged seafood products.
    - Frozen fish and seafood in particular, has been highlighted as a category with dynamic growth in 2019; this growth has been attributed to increased acceptance among consumers who were previously sceptical towards frozen fish in the past.
    - The core target market for frozen fish are busy urban consumers that seek out convenient food options for lunch and dinner.

- Frozen fish and seafood enjoyed a boost with the onset of the COVID-19 pandemic – many of these offerings are noted to have witnessed innovation towards the end of the review period, allowing brands to fill the gap created by the closure of foodservice outlets.
  - Innovation includes the development of formats adapted for quick preparation of meals such as resealable packaging and reduced weight; the constant enhancement in the nutritional value of these products is another notable point of focus for fish and seafood brands.

- Organic fish and seafood experienced strong growth over the review period, and in particular, 2019.
  - Westerners with high disposable incomes are noted to be seeking out organic variants when shopping for fish and seafood; these consumers pay attention to key claims such as sustainable fishing certifications.
  - Premium seafoods are expected to experience a gradual increase in demand over the forecast period across mid-to-high income consumers, with Euromonitor forecasting a growth in organic and premium options across retail chains through to 2025.

- Hypermarkets and supermarkets continue to lead retail value sales of fresh fish and seafood products in the UAE.
  - This value share is attributed to their large space, and assurance of quality and hygiene.
  - There has been strong growth across independent small grocers such as stalls in The Waterfront Market since its opening in 2017, however, these retailers do not challenge the leadership of hypermarkets and supermarkets.

- While still relatively immature, the share of private label products in the UAE has increased over the past year, with the toll of the pandemic on disposable incomes being a key contributor to heightened demand.
  - The two main private label players in the UAE, Lulu and Carrefour, have intensified their efforts to increase the visibility of their private label range by allocating prime shelf space to these products, and running continuous promotions.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	United Arab Emirates	2021	44.73	1.57
			2026	50.61	2.50
	Chilled Raw Packaged Fish & Seafood - Processed	United Arab Emirates	2021	113.71	1.86
			2026	125.93	2.06
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	United Arab Emirates	2021	120.15	1.92
			2026	128.69	1.38
	Dried Fish & Seafood	United Arab Emirates	2021	133.29	2.17
			2026	143.18	1.44
	Fresh Fish & Seafood (Counter)	United Arab Emirates	2021	201.85	1.64
			2026	225.34	2.23
	Frozen Fish & Seafood	United Arab Emirates	2021	182.49	3.76
			2026	212.72	3.11

Source: GlobalData, 2021

ITC - Trade Data

Crustaceans, Live, Fresh, Chilled in the UAE

UAE - 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	264,827	2,216,296	-6	1	217
1	India	150,058	2,189,258	-14	2	153
2	Pakistan	23,981	4,980	29	-7	-9
3	Iran	16,571	12,351	-6	-1	35
4	China	15,738	2,914	46	21	18
5	Ecuador	14,397	2,914	2,556	101	121
6	Vietnam	9,987	1,284	-42	-13	-11
7	USA	8,184	481	-14	7	8
8	Somalia	7,046	333	-9	50	23
9	Oman	1,648	140	195	48	54
10	Norway	1,604	38	94	5	-4

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

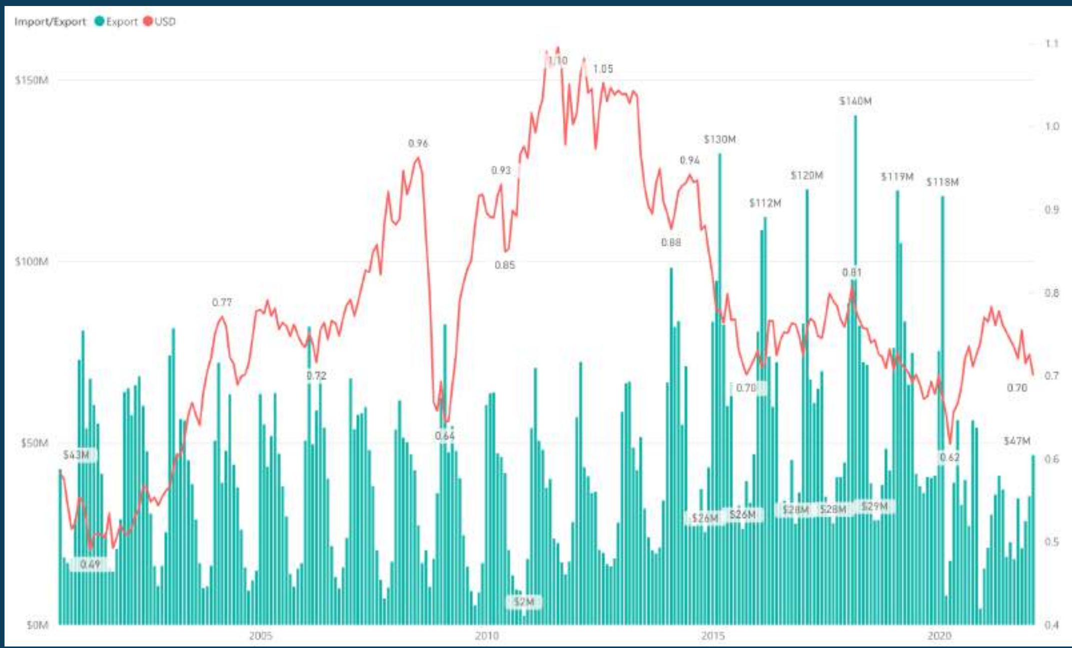
Rank	Country	Exported Value (USD Thousand)	Quantity Exported	Annual Growth Exported Value % (Short Term '19 - '20)	Annual Growth Exported Value % (Long Term '16 - '20)	Annual Growth Exported Quantity % (Long Term '16 - '20)
-	World	398,526	11,836	-36	-9	-6
1	China	313,153	6,282	-42	83	68
2	Hong Kong	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

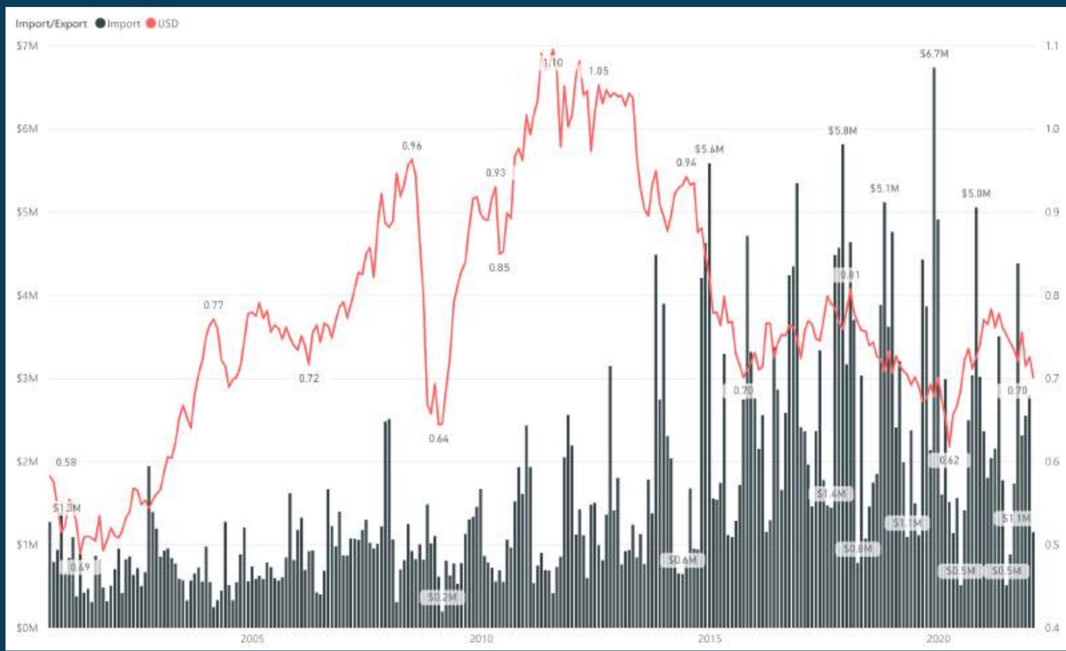
Export Value by State

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)	$47,150,161
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	$3,341,835
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

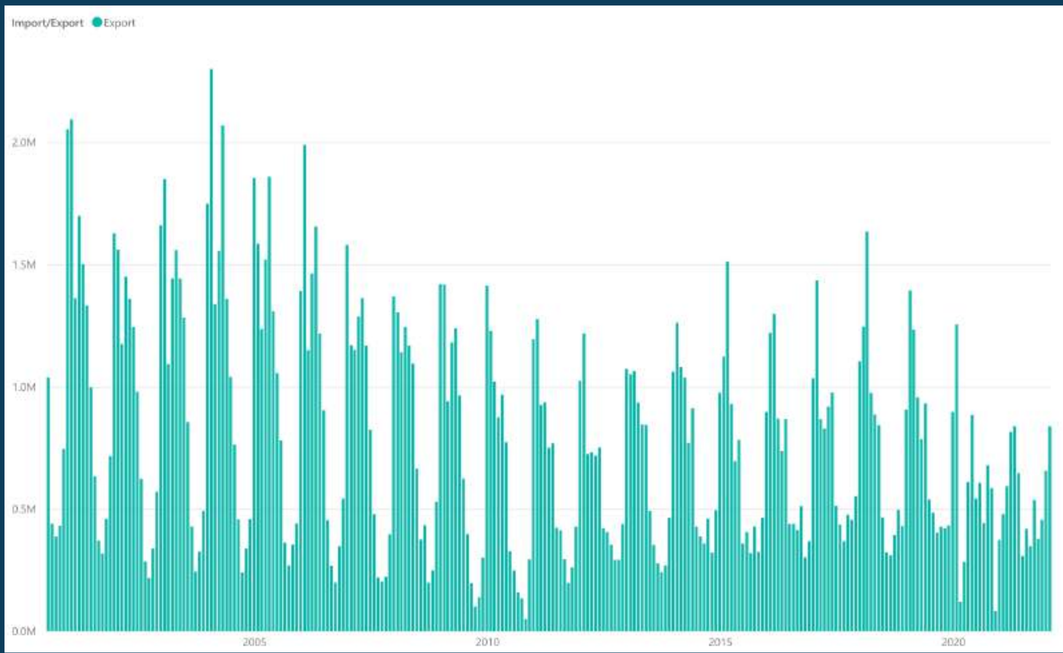
Import Value by State

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

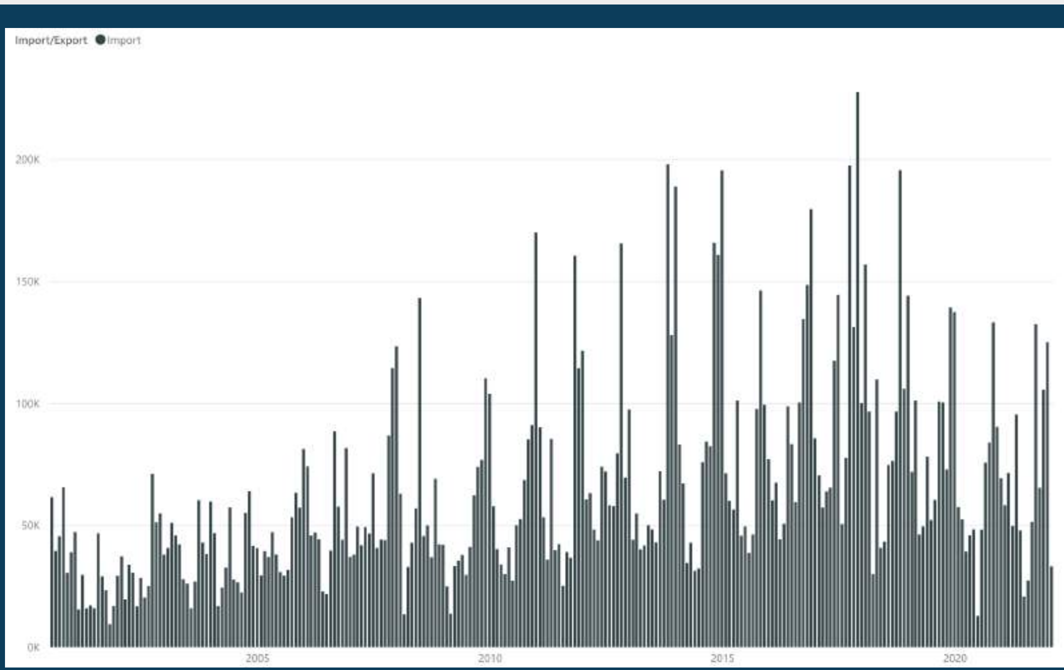
Export Volume by State

Source: FRDC, 2021

FRDC - Trade Data

Lobster Imports - Volume

AUS - Trade Data - Species: Lobster <u>(Imports):</u>



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

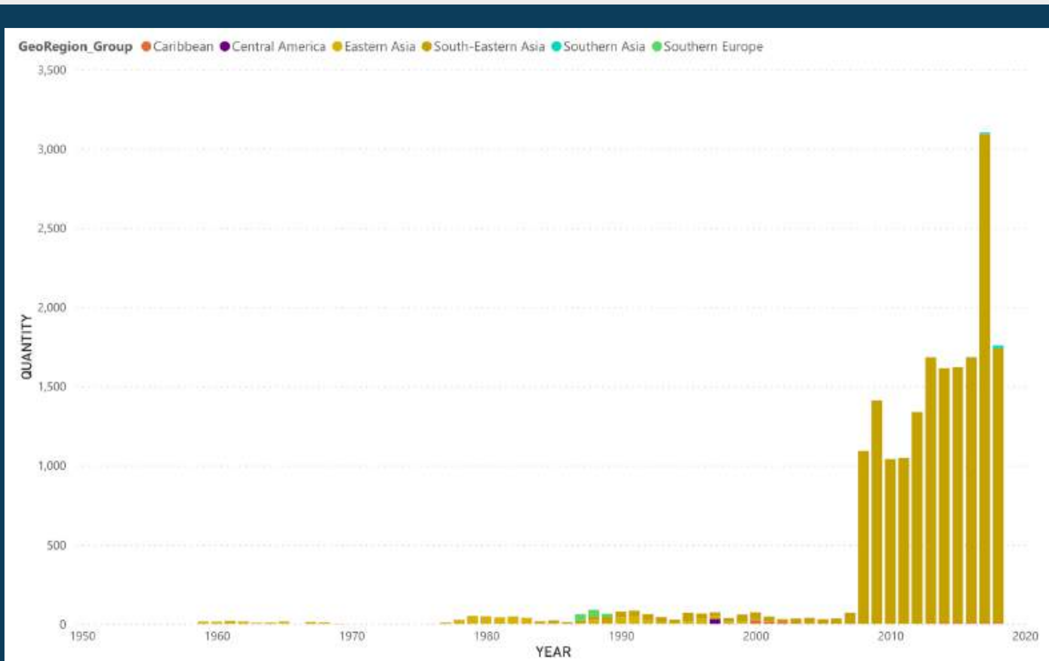
Food and Agriculture Organization (FAO) Capture Production Quantity - Lobsters, spiny-rock lobsters

ISSCAAP Group: Lobsters, spiny-rock lobsters

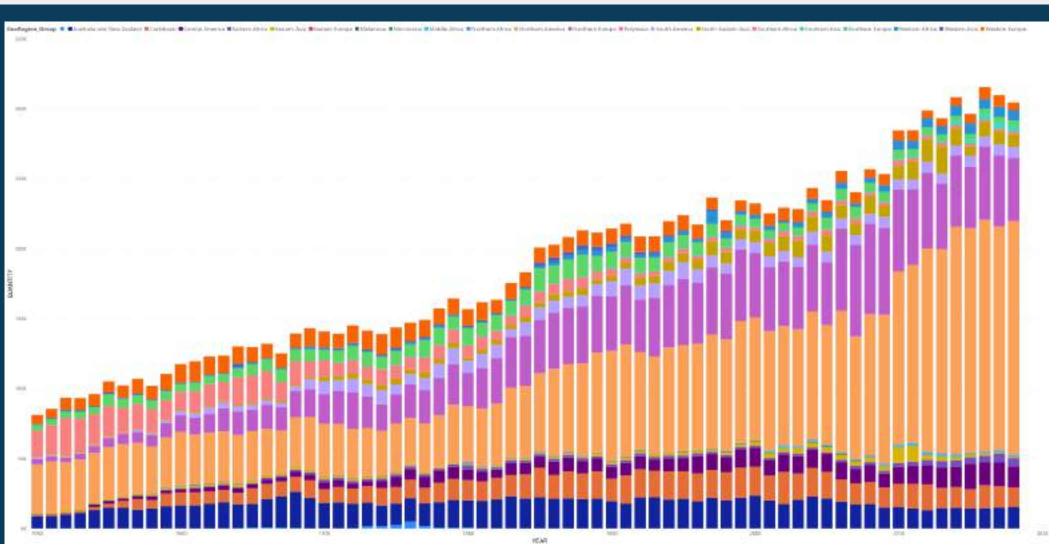
Production

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

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 - UAE Market Overview

Austrade - UAE Market Profile

DFAT - UAE Country Brief

DFAT - UK Market Insights

Enterprise Singapore - UAE Market Profile

FoodExport - UAE Country Profile

HKTDC Research - UAE Market Profile

Santandar Trade Markets - UAE Market Overview

USDA - UAE Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - UAE Consumer Profile

GWI - UAE Consumer Snapshot

Santandar Trade Markets - Reaching the UAE Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - UAE Foodservice Profile

Euromonitor International - UAE Fish & Seafood Category Overview

Euromonitor International - UAE Consumer Foodservice Overview

Euromonitor International - UAE Retailing Overview

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

International Trade Centre - Market-Specific Trade Data

USDA - UAE Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - UAE Investment Policy Hub

USDA - UAE 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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