

# UAE Supply Chain Guide



Seafood Industry  
Australia  
The Voice of Australian Seafood





# About Seafood Industry Australia

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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.

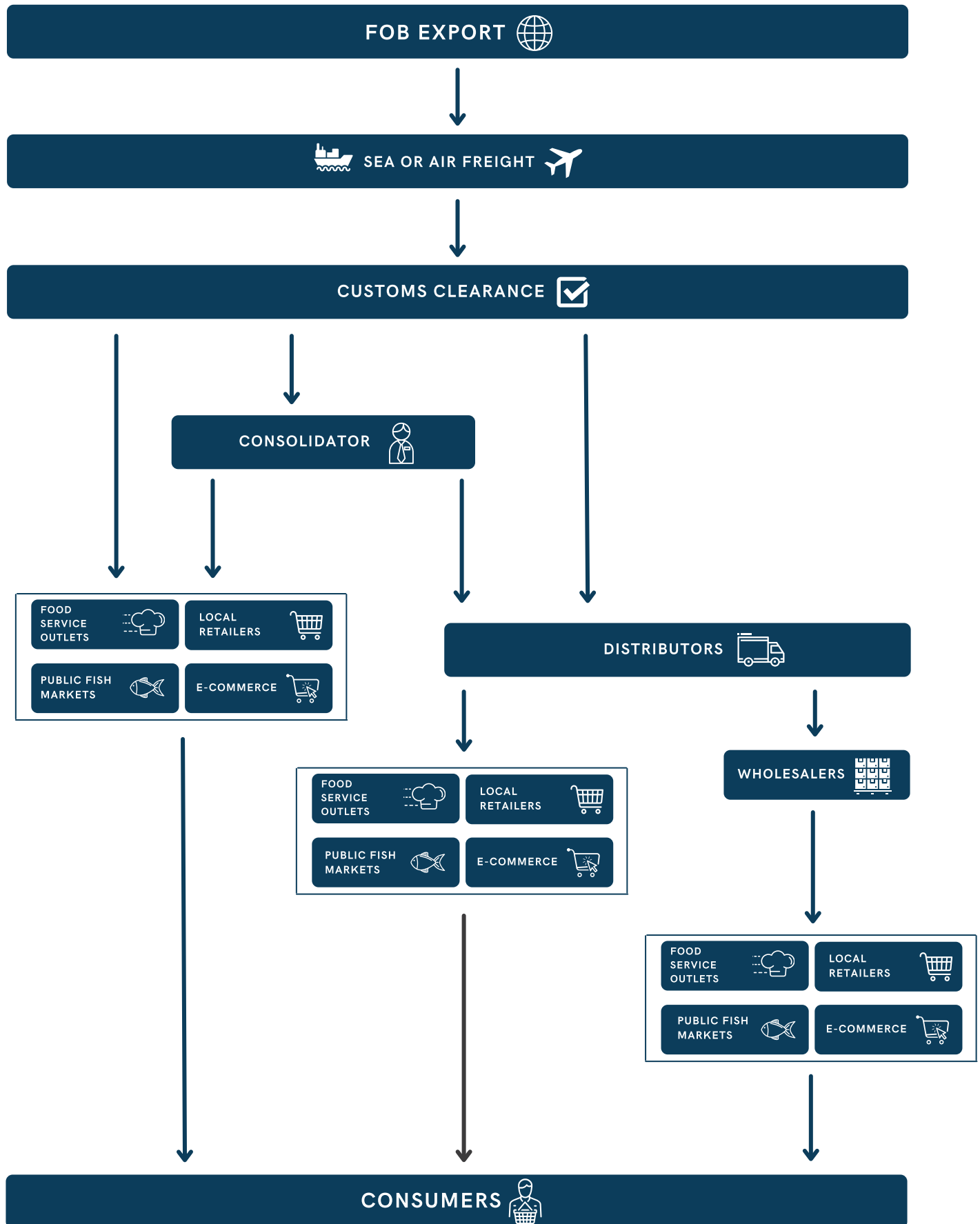
## Agricultural Trade and Market Access Cooperation (ATMAC) Program

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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.

# Supply Chain Overview



## UAE EXPORT OPPORTUNITIES

Due to the lack of agriculture in the Gulf Cooperative Council (GCC), food imports are significant, forming 70 per cent of the all food requirements. Due to extensive trade liberalisation, a high percentage of imported products (approximately 50 per cent) are further re-exported to GCC countries, former Soviet states, the Indian subcontinent and Africa.

Food and agriculture exports from Australia continues to be the most important export component of trade and investment with the Middle East and North Africa region at A\$3.9 billion annually. The 130 passenger flights per week between Australia and Dubai further bolster the food and agriculture export base, with fresh horticulture, dairy and meat occupying much of the freight on flights.

For Australian exporters, trade opportunities exist in most food categories. However, the market is highly competitive given the UAE's open trade policies. In some instances consumption is small, so opportunities exist for consolidators of mixed consignments.

The UAE has emerged as a major re-exporting hub, primarily due to its strategic location and has therefore become a significant link in the region's food chain, supported by strong logistics, recognised standards and practices, and well-established transportation routes (air, sea and land).

## INCOTERMS®

International Commercial Terms or 'Incoterms®' are a set of 11 individual international rules for interpreting trade terms issued by the International Chamber of Commerce (ICC), which help traders in different countries understand one another. Incoterms clarify the obligations of buyers and sellers in trading internationally to avoid any confusion. These terms are updated periodically to adapt to changing trade practices. Some common examples of Incoterms for any mode of transportation include:

- EXW - Ex-Works OR Ex-Warehouse
- FCA - Free Carrier
- FOB - Free on Board
- CFR - Cost and Freight
- CIF - Cost, Insurance and Freight

See Appendix A for Incoterms Chart

### USEFUL LINKS

- [Austrade Industry Directories](#)
- [Austrade - Food and beverage to the United Arab Emirates](#)
- [Micor - Manual of Importing Country Requirements](#)

# Customs, Tax and Regulatory Issues

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- Exporters need to comply with the customs, tax and regulatory regimes of foreign governments.
- Products including alcohol, pork and sensitive printed matter and images, are either banned or subject to very strict import restrictions in the target markets of KSA, Qatar and UAE.
  - No alcohol can be used as an ingredient, additive or treatment.
- Other products are subject to tariffs (taxes on traded goods). Australia does not have a free trade agreement with the UAE, so goods are usually subject to a general tariff rate of 5%. Some products attract a higher tariff rate, which can be up to 100% in the case of products such as alcohol.
- UAE, like most countries, use the Harmonised Tariff Code (HTC), an internationally standardised classification system maintained by the World Trade Organisation (WTO).
- Most aspects of compliance with foreign requirements are managed through Australian authorities to ensure that Australia maintains its reputation for high quality goods. All consignments for export require clearance via the issue of an export declaration number (EDN) through the Department for Home Affairs.
- Many consignments of food and beverage products also require export certification by the Department of Agriculture and Water Resources. This may require production premises to be accredited and sometimes individual consignments to be inspected. For example, fruit and vegetable shipments usually need phytosanitary certification to comply with biosecurity requirements.
- Importing countries may impose additional requirements. For example, UAE requires halal certification of many food and beverage products.

Source: *Regional Development Australia Exporter Guide 2019*

# Export and Import Documentation

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- Australia requires export documentation for all consignments exiting Australia. Importing countries also require documentation relating to shipments entering their countries. There is some 'overlap' between the two sets of documentation.
  - For example, The Australian Department of Agriculture and Water Resources issues certifications for food products exiting Australia to ensure some of the requirements of importing countries are met.
  - Sometimes importing countries require additional certifications that are not routinely provided by the Australian Government as part of export documentation. For example, the Gulf states require halal certification for some food products.
- Ensuring the correct documentation accompanies all shipments is vital to avoid delays with customs clearance and possibly unnecessary charges.
  - The role of a customs broker/international freight forwarder includes ensuring appropriate export and import documentation is prepared for each consignment and submitted to the appropriate authorities in Australia and the importing country.
  - Most countries have electronic systems available to exporters, customs brokers and freight forwarders to streamline this process.
- In Australia, the Department of Agriculture and Water Resources administers the Export Documentation System (EXDOC) for the issue of export documentation, including certifications for prescribed goods (see the 'Customs, Tax and Regulatory Issues' section above). EXDOC interfaces with the Customs system (Integrated Cargo System or ICS), administered by the Department of Home Affairs.
- Other commercial providers can also assist with preparing export documentation that complies with Australian Government requirements and the requirements of importing countries.
  - The Australian Arab Chamber of Commerce and Industry (AACCI) is accredited by both the Australian Government and the Gulf states to certify export documents.

Source: *Regional Development Australia Exporter Guide 2019*

# Import Requirements & Registration Process

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The UAE authorities have succeeded in unifying a number of food & drink standards and regulations. All food products imported through their entry points must be registered and labels are pre-approved by the local municipality.

Prior authorisation is required from the [UAE Ministry of Environment and Water](#) for all foodstuff imports, animals and their products, animal feeds, additives, all alcoholic beverages, pork products and tobacco products.

Imported and locally produced food products are treated equally regarding food safety regulations and labelling requirements. All food shipments to the UAE are inspected to ensure compliance with labelling and shelf-life regulations.

- 1** Gather necessary documents
- 2** Upload on ZAD or DM platform
- 3** Entering the necessary technical product data
- 4** Products registered or Follow up on feedback from authorities

There are two main platforms for product registration: ZAD which is a federal platform for all food products and Dubai Municipality.

Products to be sent into the UAE need to be registered on either the ZAD or DM platform.



# Provisions Applicable to Sale, Import and Export of Food

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## SOURCING FOOD

- Food establishments must ensure that food and materials that come in contact with food imported to Dubai are:
  - obtained or procured from sources that are regulated by the relevant food authority at the country of origin;
  - produced under sanitary conditions in an establishment regulated by the relevant food authority at the country of origin.
- Food and food contact materials imported to Dubai must comply with the UAE standards, especially those pertaining to labelling, shelf life, and the relevant requirements of this Code and associated guidelines.

## FOOD INSPECTION AND DOCUMENT VERIFICATION

- All imported food products and food contact materials are inspected by the Food Control Department at the port of entry. Authorised officers verify the document and collect samples for laboratory analysis when necessary to ensure their compliance to relevant standards and regulations.
  - At the port of entry, importers of food must submit the Health Certificates for each consignment of food that clearly state:
    - the quantities and description of imported food items;
    - that the imported products are produced or manufactured according to the requirements of Dubai Municipality in an establishment that is licensed and supervised by the competent food authority at the country of origin.
  - Consignments of raw meat and poultry shall be accompanied with Halal Slaughtering Certificates. Halal Slaughtering Certificates are valid only if they are issued at the country of origin by an Islamic Society approved by the Government of UAE.
  - Halal Certificates are required for the following products:
    - all processed meat products produced from animals that are Halal;
    - foods that contain meat or poultry products or ingredients of animal origin (e.g. gelatin) with the exception of seafood.



- The food establishment should ensure that additional requirements and supporting documents and / or laboratory analytical reports may be required for the import of specific food products when applying for import permit.
- Food contact materials should be accompanied by certificates issued by a competent laboratory indicating that the materials are food grade.

### Exports of Fishery Products to United Arab Emirates

The competent authority in the United Arab Emirates (UAE) requires a specific health certificate to be used for exports of fishery products to this destination.

This certificate differs from the generic third country health certificate in that it contains the following additional health attestation:

- That the fish were not fed processed animal proteins (PAPs) of porcine origin

In the case of certain aquaculture products (for example salmon) where this is applicable, it may be necessary for the exporter requesting the health certificate to provide some documentation to support this requirement.

*When filling out details about the fishery products in the health certificate the following would also need to be added:*

#### **For wild caught seafood:**

- Need to mention on the health certificate the words: WILD CAUGHT
- Note: If it is not wild caught, then the feed used needs to be halal.

#### **For farmed seafood:**

- Need to mention on the health certificate the word: FARMED

The relevant health certificate is available on application to approved establishments from their local SFPA port office.

## LABELLING REQUIREMENTS

- Labels must be at least presented in the Arabic language and contain the following information: product name; ingredients list; additives; the source of any animal fats; notification of any products known to cause hypersensitivity and allergies; net content in metric units; production and expiry dates; country of origin; name and address of the manufacturer, producer, distributor, importer, exporter or vendor.
- Labels can be sent directly or through an importer to health officials for pre-shipment approval.

## PROHIBITED AND RESTRICTED ITEMS

- The use of pork fat or any other pork related products as ingredients is prohibited unless they are retailed with all pork products in a specific, restricted area of the retail store that is clearly marked for non-Muslims.
  - Food labels may not include pictures of pork but should state clearly that the product contains pork.
- Alcoholic beverages and alcohol containing products can be imported but only through authorised importers.
- Imported meat products must be accompanied by a Halal certificate.
- Poppy seeds, betel or paan leaves, and other items linked to narcotic use are prohibited.

### USEFUL LINKS

- [For Food Traders and Establishments \(dm.gov.ae\) - Dubai Municipality.](https://dm.gov.ae)
- [Department of Agriculture, Water and the Environment](#)

# Logistics

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Having efficient and reliable logistics for export can give exporters a competitive advantage through better order handling and shortened product cycles. Export logistics is a crucial yet considerably complicated piece of the export puzzle that includes order handling, transportation, inventory management and handling, storage, packaging, and clearing of the export goods. Most new exporters and experienced exporters use a freight forwarder to navigate the various steps needed to get their products into international markets.

## SEA FREIGHT

Ongoing sea freight disruption has caused massive problems to global logistics.

The closure of some of the world's largest ports, congestion and shortages of storage space has resulted in ships rerouting and changing their schedules at short notice. The flow-on effects have been:

- Difficulty in getting containers
- Difficulty in securing freight capacity
- The escalating cost of freight
- Longer shipping journeys due to changing schedules
- Bottlenecks at ports
- Delays in transit

### Sea Freight, Full Container Load (FCL)

A container (20-foot or 40-foot) is exclusively used for a single shipment. The container is not shared with other cargo shipments, and the costs are borne by one party. It is generally used for heavy cargo (over 15 tons).

### Sea Freight, Less than Container Load (LCL)

A container is shared by various cargo shipments. LCL is the preferred option when there aren't enough goods to fill up the entire container. This option allows the exporters to lower their shipping costs.

# AIR FREIGHT

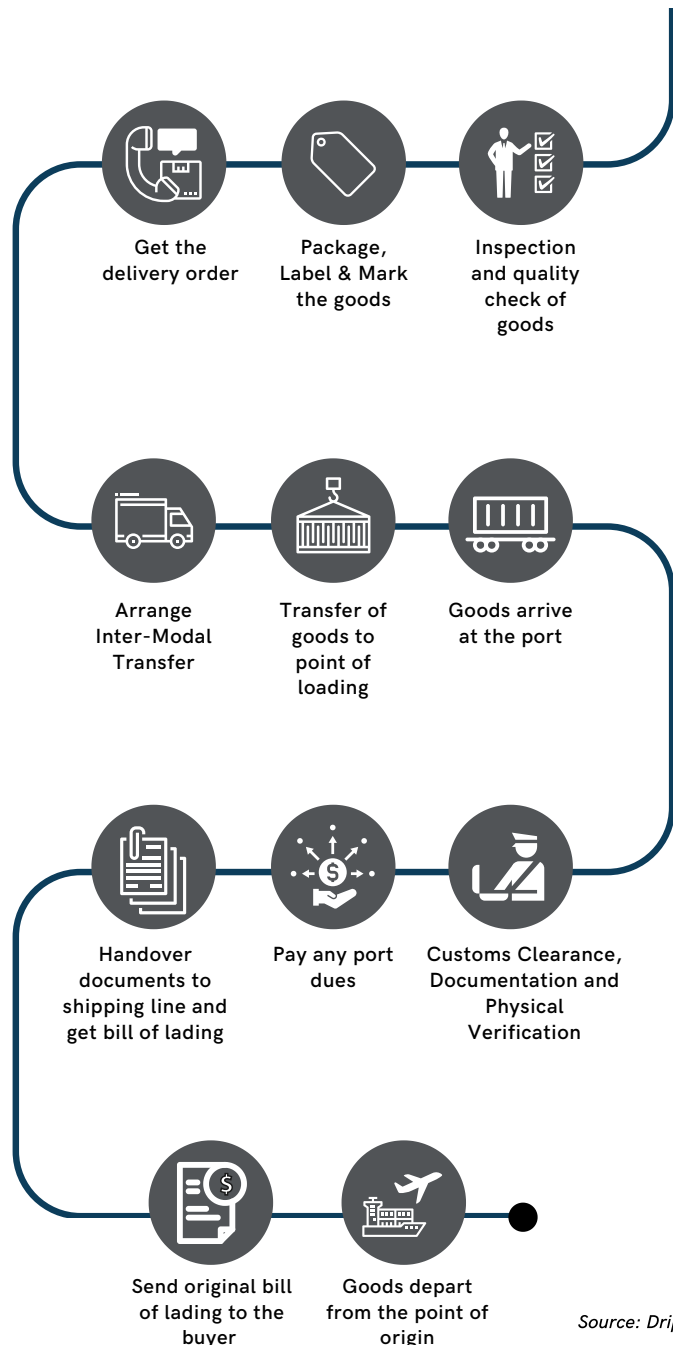
Air freight has been even more disrupted than sea freight at the onset of the pandemic and now appears to be settling into a new normal.

Most air freight is carried on passenger aircraft and with the closed border policy for international arrivals, freight has become problematic to many destinations and costs have escalated.

Government support through the International Freight Assistance Mechanism (IFAM) program has assisted to businesses to secure airfreight by keeping global air links open. The program is due to be reviewed around June-July 2022 with a replacement model being considered. More information is available through the IFAM virtual briefings and on the [IFAM](#) website.

## USEFUL LINKS

- [The International Federation of Freight Forwarders Associations \(FIATA\)](#)
- Search for a customs broker or freight forwarder on the IFCBAA site:
  - [International Forwarders & Customs Brokers Association of Australia \(IFCBAA\)](#)



Source: Drip Capital

# Supply Chain Roles and Responsibilities

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## ROLES & RESPONSIBILITIES

### Consolidator

- A consolidator is probably the most efficient and practical way of distributing food products in the UAE. The advantage for UK companies is that they can export very small quantities, without the hassle of sending in bulk to various distributors.
- The big disadvantage in this method is the inability to monitor the products in market and really understand marketing factors and potential.
- Several supermarkets in the UAE have tie-ups or their own consolidating offices in the UK, which makes it easier for UK food and drink companies to export their products to the retailer via those in-house consolidators.

### Distributor

- Most of the larger distributing companies cover all sectors in the trade, including hotels/service industry and retail. The majority of hotels in Dubai prefer to buy products through a well-established local distributor. In addition, a good distributor should be able to offer advice on the local market, product potential and detailed import regulations.
- The average importer mark-up on food products is about 10-15 percent. Most distributors supply the retail and/or the food service industry including hotels, restaurants, catering companies and airline companies.
- Some larger well-established distributors supply the retail industry and describe themselves as sales and marketing support service companies. They work extensively around the year on product launches, advertising, public relations, events and exhibitions.
- Some distributors are proactive in working with renowned chefs to conduct workshops, kitchen courses and other business development activities that promote new products to their network.

### Direct-to-Retail

- The majority of supermarkets prefer to procure directly from a consolidator. There are some leading supermarkets who still favour the traditional route of sampling the product directly from the manufacturer. Retail food prices are generally 20-25 percent above import/wholesale prices.

## KEY DISTRIBUTORS

Some of the major retail food distributors in the UAE. Note these distributors may not specialise in seafood.



## MARGIN STRUCTURE



It is important that exporters take the adjacent indicative margins as a guide only. There are many conditions attached to trading terms and because they can be a crucial element of success, they need to be strategically negotiated.

# The Retail Channel

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## OVERVIEW

- 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.

## Public Fish Markets

- Public fish markets are available in most of the main cities like Muscat, Kuwait, Dubai, Abu Dhabi, Jeddah, Doha and Bahrain which have built ultra-modern markets for the sale of fresh fish and other seafood products produced locally or imported. In UAE for example, some of those markets include:
  - Waterfront market in UAE: which includes more than 500 vendors displaying over 350 seasonal varieties of both local and imported seafood.
  - The Market is a unique fresh-food-market-within-a-mall concept in Abu Dhabi! Set against a luxurious architectural background with elegantly designed store fronts in a hygienic and eco-friendly environment – The Market consists of 4 main segments: Fresh Fruits & Vegetables, Meats, Fish and Live Fish Tanks.

### KEY FACTS

- Abu Dhabi has an estimated 70% of the landed catch in the UAE which equals 4438 tons per year.
- UAE is reliant on import to meet demand for sea food.
- 70% of seafood products is imported.
- Salmon was the most imported seafood product in the UAE.
- Consumers are seeking more healthy food options and seafood products are helping to fill the gap.



## RETAIL MARGIN STRUCTURE



The margin structure of the various supply chain partners is highly dependent on many factors including, but not limited to, the level of service offered and if freight is included.

Margins also vary based on some of the following:

- Chilled and frozen carry bigger margins, chilled the highest
- The value and uniqueness of the product (the margin % is less for higher-value products)
- The size of the order
- The size of the customer
- The retailer trading terms
- The level of marketing support

## KEY PLAYERS



# The E-Commerce Channel

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## E-COMMERCE 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 PLAYERS

**Choithrams**  
full of goodness

**Lulu**  
HYPERMARKETS | SUPERMARKETS | DEPARTMENT STORES  
Where the world comes to shop

**KIBSONS**  
INTERNATIONAL

**نون**  
noon

**GREENHEART**  
organic farms

**Ripe**  
Organic. Local. Farm Fresh.



**Carrefour**



**Supermart.ae**

**Trolley.ae**

**SPRINGBOK**

**fresh to HOME**

**BinSina**  
PHARMACY



**ابن سينا**  
ميدية

**إنستاشوب**  
InstaShop

**elGrócer**

**Organic & Real**  
.com

**amazon.ae**

**Spinneys**

**soopa**

**QualityFood**  
RETHINK GROCERY

**lifepharmacy.com**

**Aster**  
PHARMACY  
Much More Than Medicines

**LSN**  
Better Health

# The Foodservice Channel

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## OVERVIEW

Food & beverage services comprise establishments engaged in the sale of prepared food and drinks for immediate consumption. The various types of food and beverage services in USA are:

- Restaurants
- Fast food restaurants
- Food caterers
- Ship chandlers
- Airport catering
- Armed forces
- Others
- Cafes, coffee houses and snack bars

## FOODSERVICE 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 excess 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.

## Fish restaurants

- The specialised restaurants serving seafood are usually established in prime locations in the major cities and within the international chains of 5-star hotels. Most of the seafood served is of high value species including noble fin-fishes, lobster, shrimps, salmon (stakes and smoked) oysters, caviar, squid, sea cucumber and abalone and several species of bi-valves.

## FULL-SERVICE RESTAURANTS



# Appendix

## APPENDIX A - INCOTERMS CHART

Types of Transport	Any Mode or Modes of Transport		Sea and Inland Waterway Only				Any Mode or Modes of Transport				
INCOTERMS 2020	EXW	FCA	FAS	FOB	CFR	CIF	CPT	CIP	DAP	DPU	DDP
Transfer of Risk	At Buyer's Disposal	On Buyer's Transport	Alongside Ship	On Board Vessel	On Board Vessel	On Board Vessel	At Carrier	At Carrier	At Named Place	At Named Place Unloaded	At Named Place
Responsibilities & Charges											
Export Packaging	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Loading Charges	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Delivery to Port/Place	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Export Duty, Taxes & Customs Clearance	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Origin Terminal Handling Charges	BUYER	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Loading on Carriage	BUYER	BUYER	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Freight Charges	BUYER	BUYER	BUYER	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER	SELLER
Insurance	Negotiable	Negotiable	Negotiable	Negotiable	Negotiable	SELLER	Negotiable	SELLER	Negotiable	Negotiable	Negotiable
Destination Terminal Handling Charges	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	SELLER	SELLER	SELLER	SELLER	SELLER
Delivery to Destination	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	SELLER	SELLER	SELLER
Unloading at Destination	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	SELLER	BUYER
Import Duty, Taxes & Customs Clearance	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	BUYER	SELLER

# Contact Us

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