USA Market Summary & Category Data for Fish & Seafood - Other Tuna

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 Trillion): **20.93**
- GDP per capita (USD): **63,051**
- Currency: **United States Dollar** (USD)
- Exchange Rate: **1 USD = 1.36 AUD** (8/3/22)
- Mercer's 2019 Quality of Living Ranking (2020 not released due to COVID): San Francisco - **34th**, Honolulu - **37th**
- Human Development Index: **0.926** and ranked **17th**
- Logistics Performance Index: **3.89** and ranked **14th**
- Ease of Doing Business Rankings: **6th**

Source: Trading Economics, World Bank, Mercer

- **Trade Agreements:**
    - Under the Trump Administration, the USA moved away from previous free trade-supporting principles and left the TPP, among other deals. However, with the recent arrival of the Biden Administration, this trend is expected to reverse as the USA aims to best fulfill its obligations under 40 existing Bilateral Investment agreements.
    - The Australia-United States Free Trade Agreement (AUSFTA) came into effect on 1 January 2005.
    - The "Quad" alliance of Australia, the USA, India, and Japan is expected to morph into a trade bloc in the coming years.

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

Demographic Indicators

- Total Population (million): **328.24**
- Expatriate Population (million): **44.97**
- Population Growth: **0.5%**
- Median Age: **38.1**
- Urban Population: **82.46%**

- **Population Ethnicity:**
  - Non-Hispanic white 60.1%
  - Hispanic and Latino 18.5%
  - Black 13.4%
  - Asian 5.9%
  - Indigenous (mainland) 1.3%
  - Indigenous (Hawaii) and other Pacific Islanders 0.2%

- **Dominant Religious Groups:**
  - 42% Protestantism
  - 21% Catholicism
  - 2% Mormonism
  - 1% Judaism
  - 1% Islam
  - 1% Hinduism
  - 1% Buddhism
  - 2% Other (Taoism, Sikhism, folk religions)

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

Consumer Behaviour & Societal Trends

Key Trends:

- USA households are keen consumers, adequately positioned for such behaviour as they mostly fall into a middle-class segment with relatively high purchasing power. The upper class also exercises a large share of consumer purchases, with the OECD forecasting that in the decade until 2030, it is this group that will be the world's largest market segment in terms of absolute purchase value.

- The USA consumer base dedicated a higher share of weekly purchases to lower-priced products as the COVID-19 pandemic created a recession that predominantly impacted the lower and middle classes. A recent Deloitte report found that along with looking for cheaper products, those that are widely available and can be purchased in a convenient manner are of prime value to the American consumer.

- The population is very engaged in terms of utilising e-commerce platforms, with 96% of the population shopping online. This has led omnichannel retailers to continue to increase the quality and presence of their online platforms.

- American consumers are very particular about what they buy, as they are reported to be more likely to compare prices for different products, read online reviews and look for relevant promotions before making a purchase.

- While the COVID-19 pandemic has reduced the movement of consumers outside their homes, the consumer base in the USA is still very willing to travel to major supermarkets such as Walmart and Sam's Club to make a purchase. Therefore, most consumers shop with a range of channels both online and offline.

- A McKinsey report from August 2020 found that three-quarters of consumers in the USA have tried purchasing using new behaviours in response to the general uncertainty and economic pressure created by the COVID-19 pandemic. Furthermore, 36% reported that they had tried purchasing a new brand, and nearly three-quarters of that group were willing to continue using that new brand.

- Four-fifths of consumers will use credit or debit cards to make purchases however, privacy concerns regarding the submitting of personal data online remains a major concern in the USA.

- “Made in America” is a major selling point for products both online and offline, with consumers much keener than their overseas counterparts to consider whether the brand is American and/or the product was produced in the USA.

- The second-hand economy is growing rapidly, especially amongst younger generations of American consumers who are keen to change their purchasing habits to mitigate the effects of climate change.

Source: Santandertrade, OECD, Deloitte, BIGCOMMERCE, McKinsey, Google Market Finder, SMARTERCX

Digital Adoption:

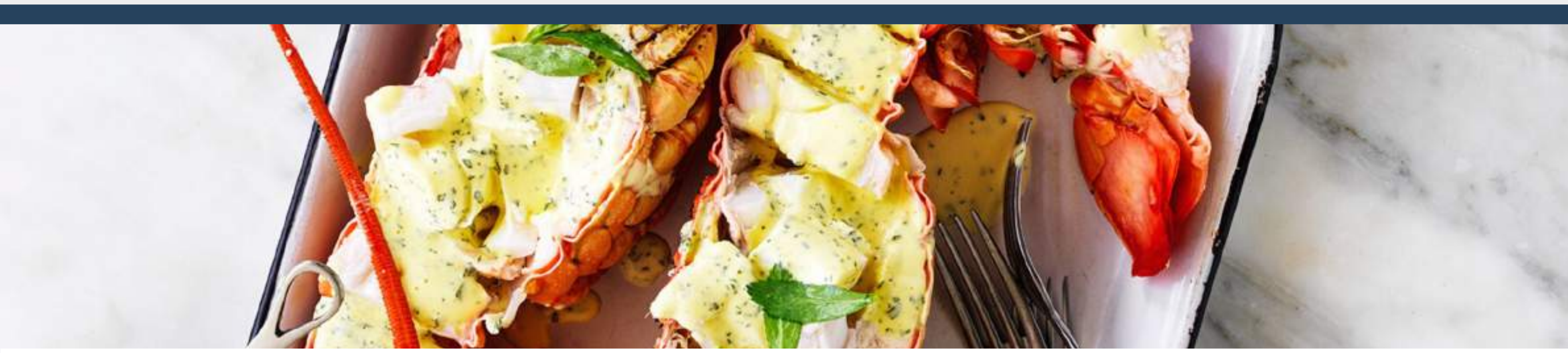
- Americans spend just over 7 hours a day on the internet, approximately 2 hours and 15 minutes of which is dedicated to social media usage.

- There are an estimated 307.2 million active social media users in the USA with an approximate 92% penetration.

- More than a third of Generation Z makes daily purchases through social media.

- Approximately one-third of Americans do not trust their personal data in the hands of major tech companies.

Source: Digital in 2022 Report



Grocery Retail Channel Developments

Key Trends:

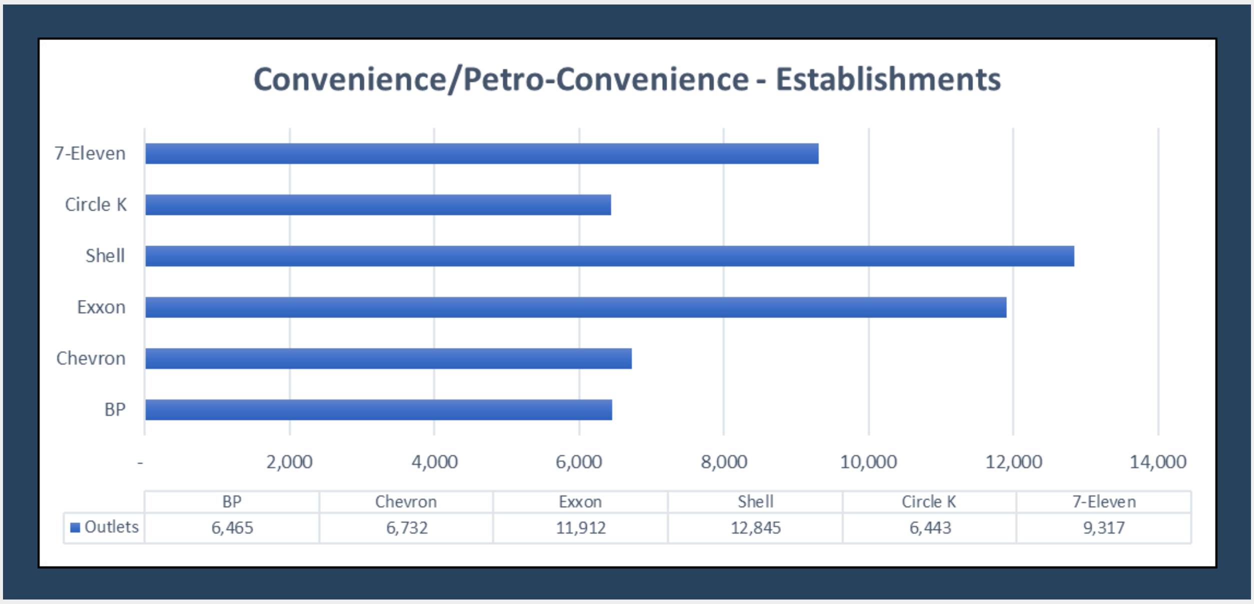
- Traditional grocery retailers suffered the most of all businesses in the grocery retail channel due to reduced capacity to implement social distancing and necessary sanitary measures in-store, along with the fact that many were classed to be non-essential businesses and therefore involuntarily closed at the height of the pandemic.
- Convenience stores and forecourt retailers also experienced negative growth in sales in 2020, albeit lower than traditional grocery retailers because they were able to remain classified as essential services. Prior to the pandemic, these two business channels experienced rapid growth in sales as a result of successful measures to primarily target on-the-go travelers.
- Alcohol sales across all segments of the grocery retail channel continued to increase throughout the pandemic, especially with regards to convenience stores and forecourt retailers.
- To support the rising usage of contactless payment methods that was accelerated by the COVID-19 pandemic, leading convenience store chain 7-Eleven recently announced the creation of a mobile wallet that can be added to the 7-Eleven app for making in-store purchases.
- Retailers across the grocery retail channel, such as Circle K (convenience stores) and Amazon Go (supermarkets) are increasingly engaging with AI technology to create cashier-less checkout options to improve the health outcomes of customers and overall shopping convenience.
- A big development in the hypermarket channel was Walmart's launching of its new membership program "Walmart+" to rival Amazon Prime. The system allows for members to obtain unlimited deliveries, Scan & Go technology, and fuel discounts, among other benefits.

- Sales of products in supermarkets rose greatly throughout 2020 after a year of average growth in 2019. This phenomenon was the result of American consumers increasing the proportion of their spending that went towards essential goods in response to greater financial pressure and uncertainty.

- The value of online grocery purchases skyrocketed throughout 2020 as consumers took advantage of curbside pickups and home deliveries to support their social distancing preferences.

Grocery Retailing Brand Outlets:

Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor, Phoenix Business Journal, NFCW

Foodservice Channel Developments

Key Trends:

- Full-service restaurants in the USA, mostly independent, have seen frequent negative sales growth following the start of the COVID-19 pandemic as consumers have turned away from dine-in eating experiences. Foodservice businesses saw the most job losses of any industry in the USA in 2020. Restaurants offering delivery, especially those businesses that partner with food delivery apps, have been spared the worst of the industry contraction as consumers can obtain their food and beverage orders whilst minimising interpersonal contact.

- With the sharp increases in-home delivery orders from full-service restaurants, many businesses have chosen to offer alternative dining options for customers in the form of, for example, ready-to-bake meals and DIY cocktails. This experimental dining trend is most popular amongst younger generations and is forecast to further increase in the long term.

- The relative size of menus pre and post-pandemic have generally decreased, in spite of the many innovative menu items recently introduced. This is due to restaurants greatly reducing menu items to improve efficiency and cover their bottom-line in the midst of declining sales. A 2021 State of the Restaurant industry report found that 63% of American restaurants offered less menu items than pre-pandemic. This trend was most profound in fine and casual dining restaurants, whereas in quick-service and family dining restaurants this trend was not as prominent.

- Many limited-service restaurants are using the pandemic’s harming of consumer demand to shift the business focus towards online services. Shake Shack has stated its business was 20% online pre-pandemic and, as of March 2021, is 80% online.

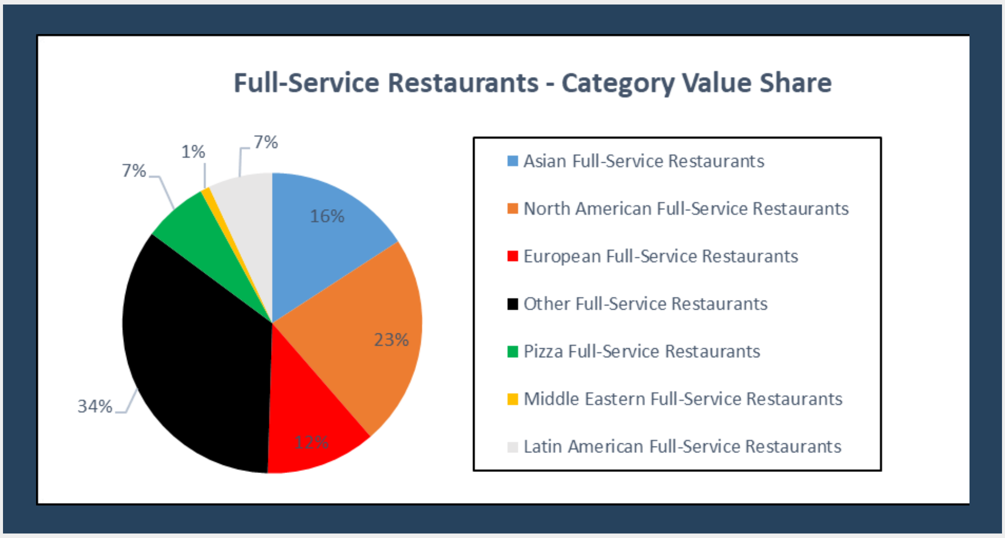
- Loyalty programs, mostly among limited-service chains, have seen an explosion in popularity in direct correlation to the number of orders completed via the internet, as customers can much more easily access and implement their reward benefits when making online purchases.

- Patterns regarding when and where consumers visit restaurants have also changed due to COVID-19, with Americans increasingly opting to have breakfast at home and reducing the frequency of visits to food courts and other hubs for restaurant activity.

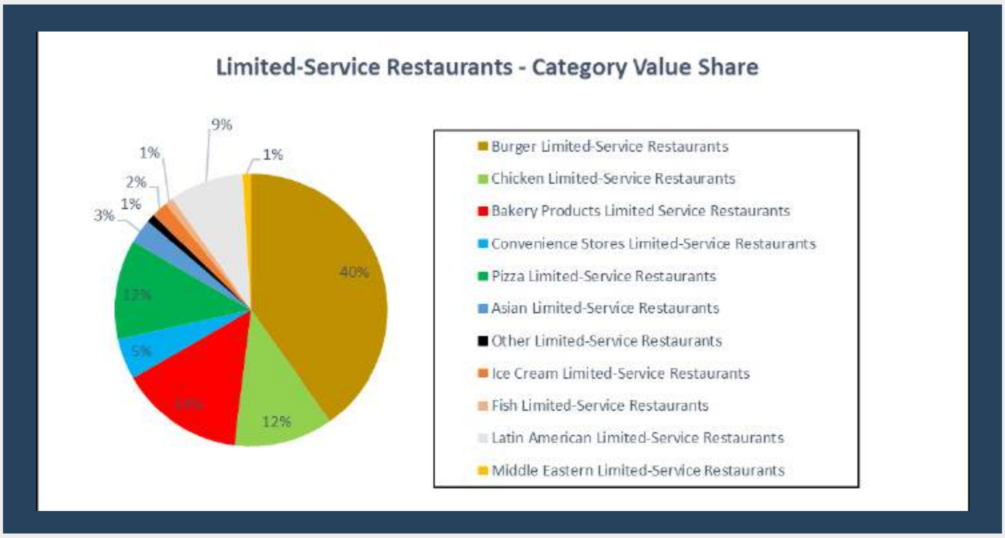
- Eco-friendly menu items have continued to feature heavily in American consumers' desires when ordering from limited and full-service restaurants, with vegan and vegetarian diets exploding in popularity and a greater demand amongst Americans for ethically-sourced produce. This has led many major fast-food chains to offer traditional customer favourites rebranded as new plant-based products, with "fake meat" from major producers such as Impossible and Beyond Burgers the key ingredient seen, for example, in Burger King's new "Impossible Whopper".

- Burgers were most selected by full-service restaurants as their highest-selling food category in early 2021, whilst limited-service restaurants believed sandwiches and wraps to be their most popular range of foods. The most popular order in the rapidly growing Asian food market was milk tea, with the beverage experiencing a relatively high percentage of orders late at night.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor, Huffington Post, WARC, National Restaurant Association

Food & Drink e-Commerce Channel Developments

Key Trends:

- Due to the high rates of COVID-19 infections in the USA, coupled with the much lower risk of contracting COVID-19 when purchasing products through online channels, Food & Drink e-commerce has seen an explosion in sales growth since early 2020. At the peak of the COVID-19 crisis in the USA, consumer spending on e-commerce had jumped 44.4% from the last quarter.

- Curbside pickup of online orders has proved a much cheaper option for businesses than offering delivery services, especially in rural and suburban areas where reliance on personal automobiles is higher. At the end of 2019, only 6.9% of major e-tailers used this process, a figure which had increased to 43.7% by August 2020, of which many of these businesses, such as Walmart and Kroger, relied heavily on Food & Drink sales. Target, however, was much later to allow for perishable goods to be picked up in this manner and thus experienced its own sharp increase in sales much later.

- The pace of autonomous Food & Drink delivery innovation has increased due to the pandemic, as Amazon and Walmart have greatly enlarged their investment and progress in their respective drone delivery pilot programs. These measures are targeted to suit greater customer demands for convenience, especially amongst millennials and even younger generations.

- Food delivery apps have seen incredible levels of growth over the last decade in terms of sales, market size, to name a few measures. This trend has only been accelerated by the pandemic, with nearly a third of US consumers recently stating that they use third-party delivery apps to order from restaurants at least twice a week.

- Bundles of Food & Beverage products have increasingly featured on online menus, with a range of options such as mix-and-match, whereby customers can create their own package, or groups of items put together by the E-tailer to suit a certain activity, like Pantry Shop’s workout bundles.

Key E-tailers:

- Costco, operating as a major hypermarket, saw large sales volume increases during the earlier stages of the pandemic frequented by "panic-buying" consumer activities.
- According to Insider Intelligence, e-tailers Amazon and Instacart have benefitted the most from the shift towards click-and-collect purchases of food and beverage products.
- In the eco-friendly food segment, there are many divisions in which market leaders have experienced considerable growth in recent years, especially since the pandemic began. "Fake meat" producer Beyond Meat's 2-day home delivery service has led the meat substitute e-commerce market. HelloFresh and Sun Basket still lead the meal kit market, the latter of which retains consistent growth figures through an online subscription portal.

Source: Euromonitor, Department of Commerce, Digital Commerce 360, Grocery Dive

Seafood Consumption in the USA

- Fish and seafood supply per person in the USA is valued at 22.36 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:

- US Department of Commerce: Enforces the conditions of the AUSFTA.
- Customs and Border Protection (CBP): Inspect food imports to check for violations of USDA FSIS (for meat and poultry products) or FDA (for all other products) regulations.

Product Registration/Import Procedure:

- Facilities that manufacture, pack, or process products to be sold in the US must register with the FDA. There are, however, some exemptions for entities including farms and fishing vessels, and therefore it is best to check the FDA's "Questions and Answers Regarding Food Facility Registration: Guidance for Industry" page for clarity. Registration must be renewed bi-annually.
- All food regulation requirements must be made by the exporting firm before the goods enter the United States. Extra attention must be paid to special regulations that apply to certain products such as alcoholic beverages and fresh food.
- If the firm exporting to the USA decides to use a licensed customs broker or another kind of licensed agent then the owner's declaration must be submitted by the exporter authorizing this process. This declaration, if made overseas, must be executed before a notary public (can be found at all American embassies and most consulates) and bear the notary stamp.
- Records must be maintained of all stages of production from the product being created to when it is sold on the shelves in the USA.

Documentation Required:

- Bill of Lading/Airway Bill.
- Invoice
- Packing list
- Other shipment papers (to be completed by the entity receiving the goods in the USA)
- An import license is generally not required, however, there are exemptions under both USDA FSIS and FDA regulations that can be viewed on the agencies' respective websites.
- Many of the required documents can be filed through the CBP Automated Broker Interface (ABI) online portal.

General Labelling Requirements:

- For meat and poultry products, the USDA FSIS procedure must be followed. Whereas for all other products, FDA procedures are to be followed. The main components of these procedures are summarised as follows:
- Nutrition information (metric system and equivalent % of daily value)
- Ingredient list
- Net quantity (imperial system with possibility for the metric system in brackets)
- Country of origin
- Food products do not need to be dated
- Product name and description in prominent letters
- Name and address of manufacturer, packager, or distributor
- Allergy labelling (if required)
- Information not required cannot be added to the information panel (where ingredients and nutrition are listed)
- Juices must have % juice listed
- Additives and colourings

Packaging Requirements:

- List net quantity on outside packaging along with numbers used to identify the product on the invoice.
- Wood packaging materials must be treated by fumigation and heat, before being marked with certification of this process.

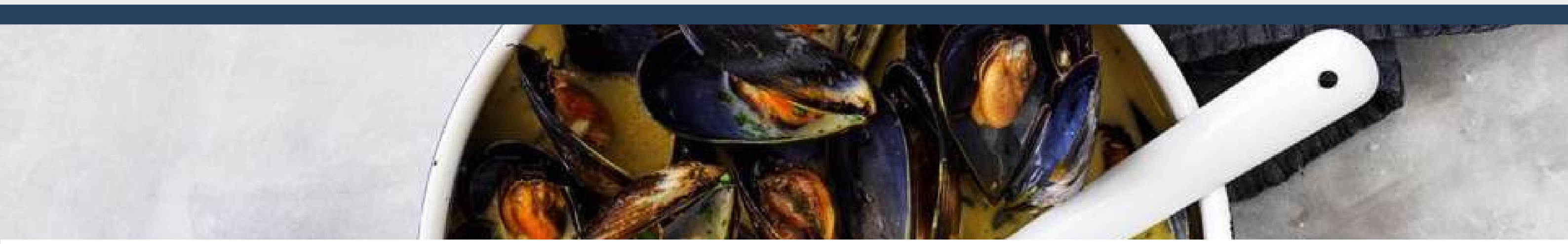
Non-Tariff Barriers:

- Products are examined by the CBP upon arrival. If it is a business' first time importing, there is a higher chance of freight being flagged for a more in-depth inspection.
- Products intended for children face a range of extra regulations requiring compliance tests before being exported to the USA.
- Product liability insurance is sometimes required by the US vendor.
- Import quotas for dairy products

Tariffs Levied:

- Tariffs are classified as per the Harmonised Tariff System (HTS) and the online Tariff Database can be used to help calculate the specific duty payable on any one item.
- AUSFTA eliminated most tariffs but some still remain.
- Special tariff-rate quotas were also introduced as part of the AUSFTA, particularly with regards to the agriculture sector for beef, cheese, and avocado products.

Source: USDA Food and Agricultural Import Regulations and Standards Country Reports [FAIRS]



Category Data

Fish and Seafood in the USA

Key Trends:

- Before the onset of the pandemic, consumers unwilling to cook at home were generally dependent on takeaway meals or other foodservice offerings. However, 2020 has seen widespread foodservice closures around the country, resulting in many consumers having no other option but to cook at home. As the trend of cooking at home has been on the rise, more consumers are widening their palates and cooking skills. While consumers would previously refrain from purchasing fish and seafood due to their lack of confidence in cooking such items, this has changed in 2020 with new faith in their developed skills.

- US consumers have been gravitating towards online grocery shopping since it offers more convenience and safety. Even though online grocery shopping has steadily been on the rise for the last few years prior to 2020, many Americans did not find it necessary to alter their traditional shopping habits of buying groceries in-store. However, after the onset of the pandemic, many consumers are realising the merits of online grocery shopping, especially as it is safer and restricts possible exposure to the virus.

- Earlier, for a highly perishable category like fish and seafood, many consumers were hesitant to buy these products online as they were not as trusting of a stranger picking out their food. However, this behaviour is slowly changing as more consumers are happy to try out newer services in order to stay safe.

- Eating habits have been affected by foodservice closures, leading to a short-term shift towards cooking at home. However, it is expected that once foodservice outlets go back to operating at full capacity, consumer eating habits will go back to being reliant on such outlets. Of course, this will largely depend on the state of the economy- if there is an increased possibility of an economic recession, consumers will try and save money by dining at home.

- The pandemic and the resulting substantial changes to daily lifestyles have led to a major emergence of the health-conscious consumer. For many, 2020 gave them the opportunity to examine and assess their daily habits and consumption patterns and make the necessary adjustments to their eating habits so that they may lead healthier lives. Fish and seafood in particular have been traditionally viewed as healthy sources of protein, making them a strong alternative to meat products. The latter category has recently gained negative press attention in the last few years due to varied health concerns relating to the consumption of red meat.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	United States of America	2021	3,171.41	1.06
			2026	3,330.36	.98
	Chilled Raw Packaged Fish & Seafood - Processed	United States of America	2021	1,486.57	1.13
			2026	1,565.23	1.04
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	United States of America	2021	1,788.09	1.36
			2026	1,916.61	1.40
	Dried Fish & Seafood	United States of America	2021	441.22	1.57
			2026	474.82	1.48
	Fresh Fish & Seafood (Counter)	United States of America	2021	2,339.88	.95
			2026	2,443.49	.87
	Frozen Fish & Seafood	United States of America	2021	3,651.82	1.09
			2026	3,897.02	1.31

Source: GlobalData, 2022

ITC - Trade Data

Fresh or Chilled Yellowfin Tunas in the USA

USA - Trade Data - HS Code 030232 Fresh or chilled yellowfin tunas "Thunnus albacares" (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	167,702	13,055	13	-7	-7
1	Panama	47,131	3,754	43	50	47
2	Sri Lanka	10,461	455	-22	-25	-30
3	Costa Rica	9,994	741	4	9	8
4	Grenada	9,227	934	23	8	3
5	Trinidad and Tobago	9,010	1,140	-30	-8	-2
6	Philippines	8,498	547	36	-28	-29
7	French Polynesia	8,117	563	358	4	2
8	South Africa	7,846	380	119	59	25
9	Ecuador	6,851	501	176	4	1
10	Seychelles	6,698	356	29	21	13

AUS - Trade Data - HS Code 030232 Fresh or chilled yellowfin tunas "Thunnus albacares" (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	4,779	389	-19	-4	-7
1	USA	4,568	366	16	-3	-5
2	Japan	198	22	-90	-26	-26
3	Canada	10	1	-50	-	-51
4	Hong Kong	2	<1	-65	-11	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

ITC - Trade Data

Frozen Albacore or Longfinned Tunas in the USA

USA - Trade Data - HS Code 030341 Frozen albacore or longfinned tunas "Thunnus alalunga" (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	3,364	346	15	-18	-36
1	Canada	1,199	131	-10	-25	-40
2	South Korea	1,117	84	10	-5	-32
3	Vietnam	693	87	743	23	1
4	Taiwan	261	34	122	101	50
5	China	81	10	6	-39	-50
6	Japan	14	1	-89	-25	-20
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

AUS - Trade Data - HS Code 030341 Frozen albacore or longfinned tunas "Thunnus alalunga" (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	3,215	870	24	25	18
1	Thailand	1,782	486	-29	90	63
2	Spain	1,432	385	-	-29	16
3	-	-	-	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

ITC - Trade Data

Fresh or Chilled Albacore or Longfinned Tunas in the USA

USA - Trade Data - HS Code 030231 Fresh or chilled albacore or longfinned tunas "Thunnus alalunga" (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	2,926	372	40	-26	-30
1	French Polynesia	1,283	150	46	3	1
2	Fiji	1,145	140	6	-34	-37
3	Australia	339	50	464	-40	-38
4	Canada	91	20	479	12	5
5	Brazil	33	9	-	-43	11
6	Marshall Islands	23	2	-	-	-
7	New Zealand	7	1	-63	22	0
8	Trinidad and Tobago	5	<1	-37	-26	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

AUS - Trade Data - HS Code 030231 Fresh or chilled albacore or longfinned tunas "Thunnus alalunga" (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	226	41	118	-32	34
1	USA	225	40	138	-32	-33
2	Japan	1	1	-	-25	-
3	-	-	-	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

ITC - Trade Data

Fresh or Chilled Bigeye Tuna in the USA

USA - Trade Data - HS Code 030234 Fresh or chilled bigeye tunas (Thunnus obsesus) (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	41,606	2,936	70	-6	-10
1	Brazil	13,815	1,130	127	8	1
2	South Africa	6,867	381	122	80	44
3	French Polynesia	5,661	373	96	0	0
4	Marshall Islands	4,912	295	81	11	-5
5	Canada	2,334	192	103	-6	-6
6	Australia	2,054	121	104	-11	-10
7	Ecuador	1,686	128	2	-21	-16
8	Sri Lanka	1,150	59	-9	-22	-25
9	Suriname	811	95	-24	-27	-27
10	Philippines	491	23	173	-44	-50

AUS - Trade Data - HS Code 030234 Fresh or chilled bigeye tunas (Thunnus obsesus) (Export):

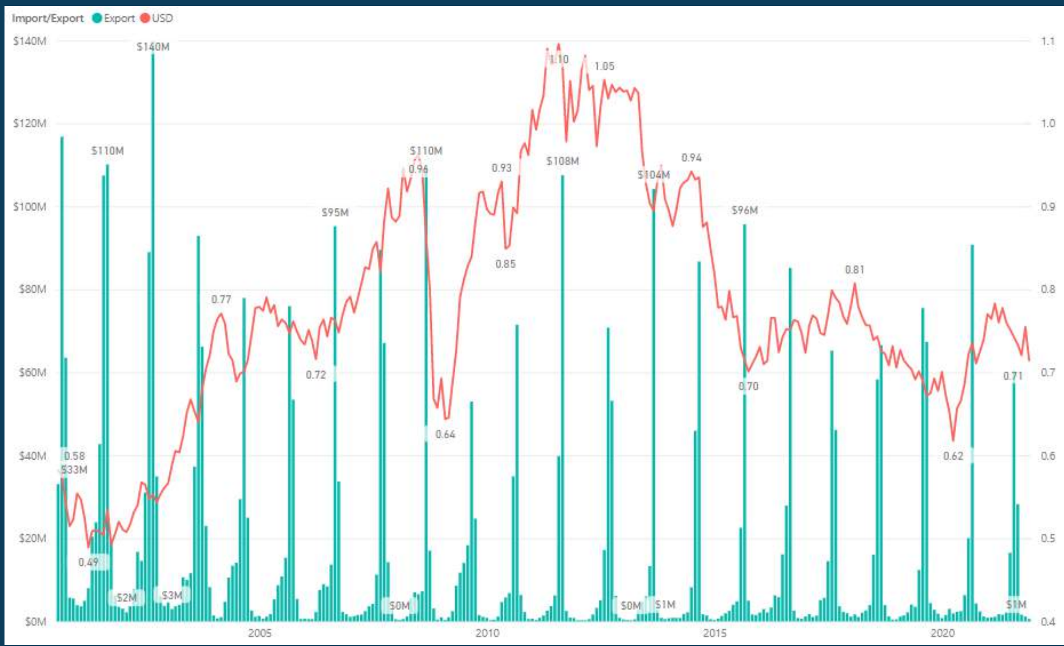
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	1,973	165	15	-16	-16
1	USA	1,535	121	63	-10	-11
2	Japan	394	44	-49	-28	-24
3	Canada	44	<1	2,184	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2021

FRDC - Trade Data

Tuna Exports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna) (Exports):



Value of Exports - Tuna

Commodity Description	Value
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	$1,789,121,600
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	$560,482,999
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$531,417,326
Tunas (other than albacore, yellowfin and skipjack), frozen (excl. fish fillets, other fish meat, livers and roes)	$252,826,085
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	$201,851,835
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (excl. fish fillets, other fish meat, livers and roes)	$193,386,802
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	$95,612,399
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$86,666,460
Tuna meat, frozen (excl. fillets)	$71,627,449
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. tunas, skipjack and bonito (Sarda spp.) of Chapter 03)	$62,917,334
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$41,894,516
Live Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	$20,822,090
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	$20,108,163
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	$18,426,092
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	$18,340,920
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$15,461,070
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$12,889,438
Frozen bluefin tunas (Thunnus thynnus) (excl. southern bluefin tunas; fillets and other meat of HS 0304 and livers and roes)	$6,932,639
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	$6,364,468
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$2,650,796

Value of Exports - Top 20 Commodity Breakdown

Country	Value
Japan	$3,716,438,349
United States of America	$143,532,962
New Zealand	$57,046,472
Thailand	$20,895,475
Korea, Republic of	$16,363,196
China	$15,994,743
Samoa (American)	$10,961,764
Spain	$8,503,419
Iran	$6,603,407
Iran, Islamic Republic of	$5,596,400
Singapore	$4,972,739
Vietnam	$4,373,949

Leading Export Destinations - Value

State	Value
SA	$3,399,041,826
QLD	$326,545,497
NSW	$151,173,546
WA	$61,817,492
Foreign (re-export)	$48,983,770
VIC	$37,578,419
TAS	$3,061,536
NT	$5,772

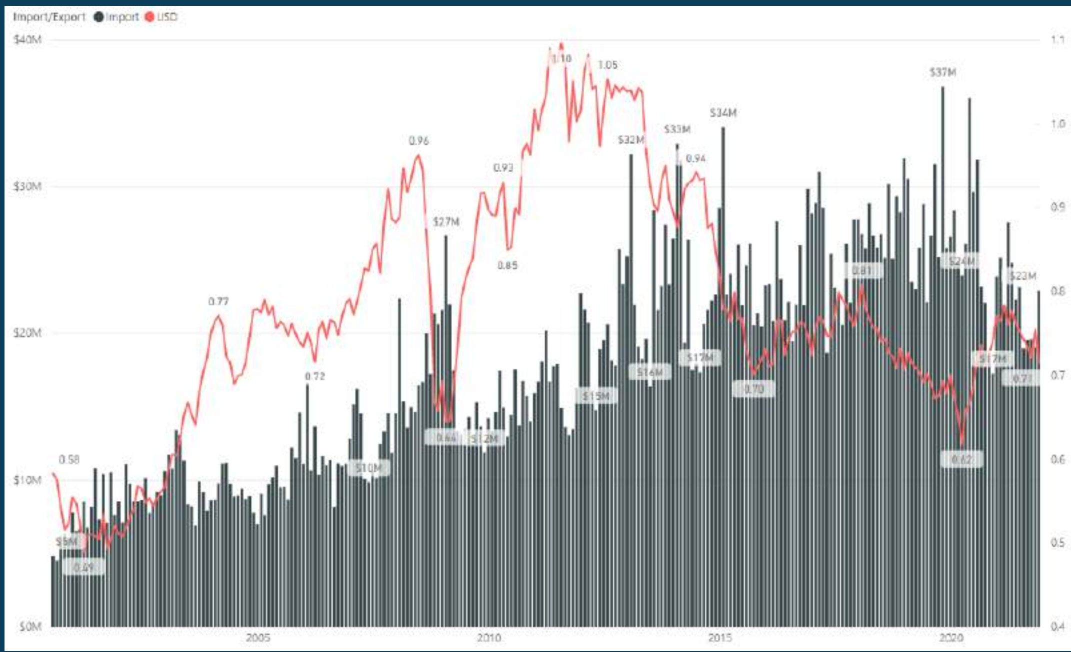
Export Value by State

Source: FRDC, 2022

FRDC - Trade Data

Tuna Imports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna) (Imports):



Value of Imports - Tuna

Commodity Description	Value
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 03)	$4,341,487,148
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers; and goods of Chapter 03)	$93,623,722
Frozen fillets of tunas (of the genus Thunnus), skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis)	$55,094,140
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) and other fish of the tribes Thunnini or Sardini (incl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 03)	$14,792,496
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	$14,528,187
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	$11,264,650
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	$4,973,253
Fresh or chilled yellowfin tunas (Thunnus albacares) (excluding fillets and othe	$4,616,261
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	$3,985,172
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	$2,652,640
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	$1,685,090
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (exclu	$1,392,405
Fresh or chilled skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	$990,915
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis) (excl. fillets and other meat of HS 0304 and livers and roes)	$814,320
Frozen tunas (of the genus Thunnus) (excluding those of HS 030341 to 030346, fi	$360,533
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin and bigeye tunas; Atlantic and Pacific bluefin and Southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	$242,030
Frozen tunas of the genus Thunnus (excl. albacore or longfinned tunas; yellowfin tunas; bigeye tunas; bluefin tunas; southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	$220,362
Fresh or chilled bigeye tunas (Thunnus obesus) (excluding fillets and other meat	$200,505
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	$196,746
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excluding fillets an	$148,320

Value of Imports - Top 20 Commodity Breakdown

Country	Value
Thailand	$4,003,123,779
Indonesia	$364,813,606
Vietnam	$35,458,863
Philippines	$30,489,246
Italy	$22,192,917
Japan	$12,973,095
New Zealand	$11,457,516
Korea, Republic of	$9,444,166
China	$8,072,253
Maldives	$7,769,917
Fiji	$7,058,191
Spain	$5,521,015

Leading Import Sources - Value

State	Value
VIC	$2,697,607,651
NSW	$1,031,115,277
QLD	$416,663,416
WA	$214,182,359
SA	$193,684,335
TAS	$754,303
NT	$33,604

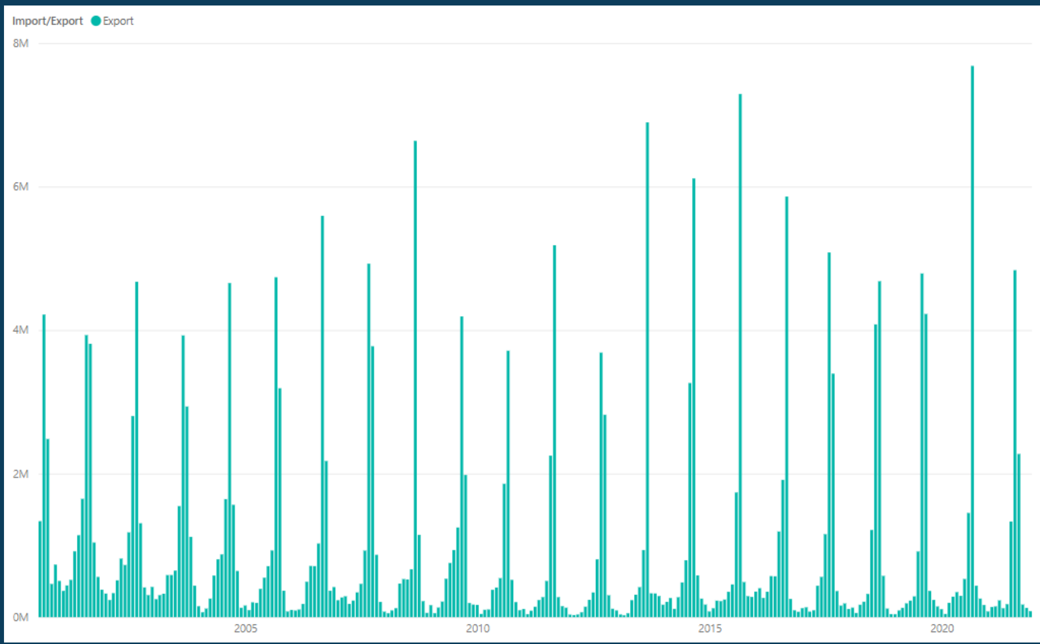
Import Value by State

Source: FRDC, 2022

FRDC - Trade Data

Tuna Exports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna) (Exports):



Volume of Exports - Tuna

Commodity Description	Quantity
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	95,864,268
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	37,909,456
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and livers and roes)	25,968,210
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	20,483,298
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. tunas, skipjack and bonito (Sarda spp.) of Chapter 03)	14,673,342
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	8,973,080
Tunas (other than albacore, yellowfin and skipjack), frozen (excl. fish fillets, other fish meat, livers and roes)	8,223,501
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (excl. fish fillets, other fish meat, livers and roes)	7,057,581
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	6,409,110
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	5,786,701
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	3,791,635
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	2,956,682
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	2,702,888
Tuna meat, frozen (excl. fillets)	2,637,096
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	1,655,066
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	1,048,355
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	438,310
Frozen bluefin tunas (Thunnus thynnus) (excl. southern bluefin tunas; fillets and other meat of HS 0304 and livers and roes)	430,103
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	374,186
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	365,516

Volume of Exports - Top 20 Commodity Breakdown

Country	Quantity
Japan	207,892,729
New Zealand	13,773,232
United States of America	10,578,112
Thailand	5,928,112
Samoa (American)	3,811,081
Spain	2,036,830
Vietnam	1,402,056
Korea, Republic of	916,444
China	716,608
Singapore	524,180
Indonesia	238,761
Federated States of Micronesia	210,668

Leading Export Destinations - Volume

State	Quantity
SA	176,604,915
QLD	40,862,474
Foreign (re-export)	11,459,703
NSW	11,292,303
WA	5,473,498
VIC	3,519,629
TAS	158,096
NT	855

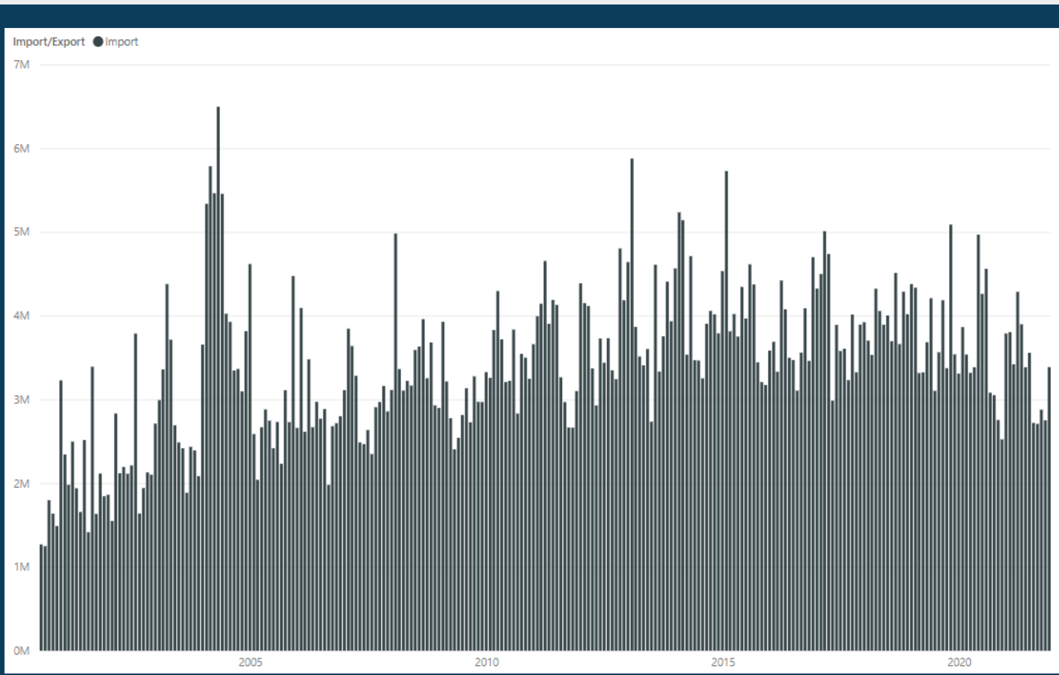
Export Volume by State

Source: FRDC, 2022

FRDC - Trade Data

Tuna Imports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna) (Imports):



Volume of Imports - Tuna

Commodity Description	Quantity
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 03)	827,573,993
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers; and goods of Chapter 03)	20,460,274
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	11,221,067
Prepared or preserved tunas, skipjack and bonito (Sarda spp.) and other fish of the tribes Thunnini or Sardini (Incl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 03)	5,062,920
Frozen fillets of tunas (of the genus Thunnus); skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis)	3,281,910
Frozen yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	2,181,374
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. fillets and other meat of HS 0304 and livers and roes)	2,021,522
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (exclu	1,375,541
Fresh or chilled skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. fillets and other meat of HS 0304 and livers and roes)	1,019,927
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	391,474
Fresh or chilled yellowfin tunas (Thunnus albacares) (excluding fillets and othe	329,431
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. fillets and other meat of HS 0304 and livers and roes)	192,351
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin and bigeye tunas; Atlantic and Pacific bluefin and Southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	111,420
Frozen tunas (of the genus Thunnus) (excluding those of HS 030341 to 030346, fi	109,405
Frozen tunas of the genus Thunnus (excl. albacore or longfinned tunas; yellowfin tunas; bigeye tunas; bluefin tunas; southern bluefin tunas; skipjack or stripe-bellied bonito; fillets and other meat of HS 0304 and livers and roes)	60,516
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	48,824
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	35,713
Tunas, frozen (excl. albacore, longfinned and yellowfin tuna, fish fillets and other fish meat of 0304, livers and roes)	29,428
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. fillets and other meat of HS 0304 and livers and roes)	25,790
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excluding fillets an	23,158

Volume of Imports - Top 20 Commodity Breakdown

Country	Quantity
Thailand	788,939,998
Indonesia	47,627,193
New Zealand	8,868,608
Vietnam	6,014,572
Philippines	5,846,760
Japan	3,722,430
China	2,426,563
Italy	2,057,746
Country Unknown	1,662,000
Korea, Republic of	1,490,968
Fiji	1,083,029
Papua New Guinea	717,385

Leading Import Sources - Volume

State	Quantity
VIC	495,334,300
NSW	198,589,398
QLD	84,230,002
SA	52,946,848
WA	44,304,872
TAS	239,922
NT	3,470

Import Volume by State

Source: FRDC, 2022

FRDC - Trade Data Sourced from FAO

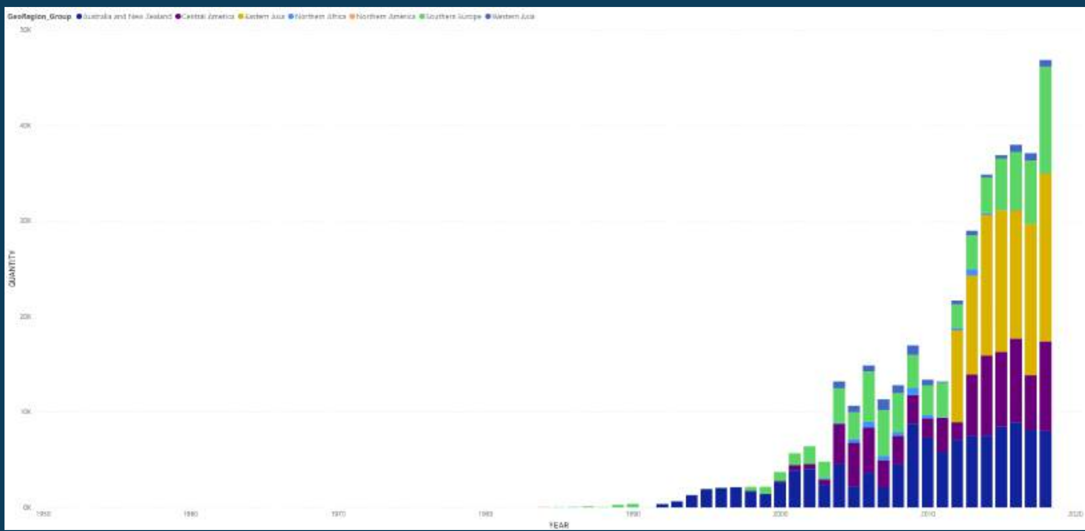
Food and Agriculture Organization (FAO) Capture Production Quantity - Tunas, Bonitos, Billfishes

ASFIS Species: Tunas

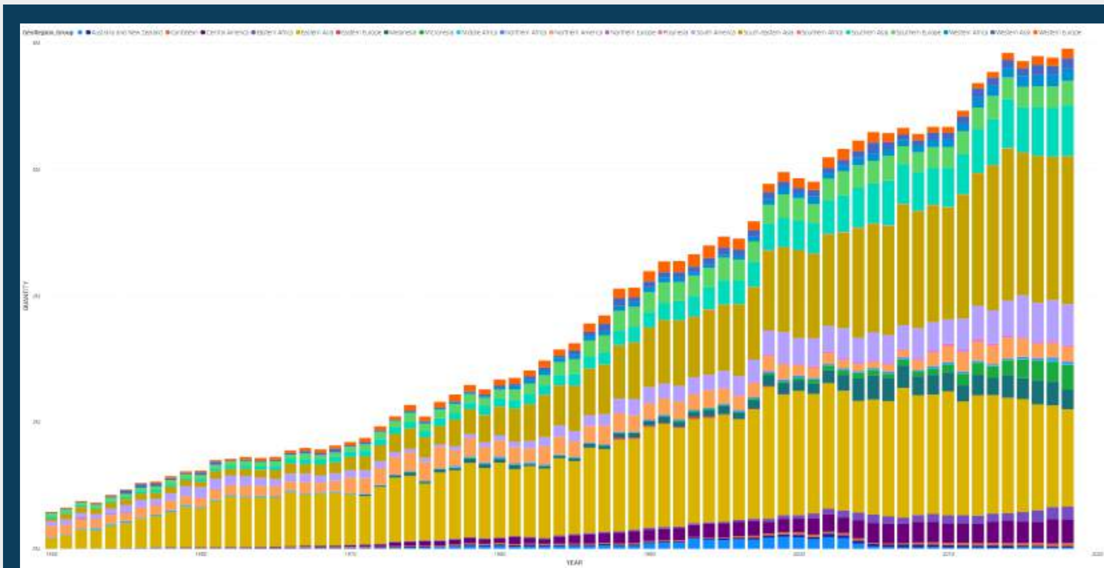
Production

Country Name En	Unit Name	2020
Australia	Tonnes - live weight	15,784
United States of America	Tonnes - live weight	203,502

Production Volume by ASFIS Species - FAO



Production Volume by GeoRegion - Aquaculture Production - FRDC



Production Volume by GeoRegion - Wild Catch Production - FRDC

Source: FAO, FRDC, 2021

Additional Resources

COUNTRY INSIGHTS

Agriculture and Agri-Food Canada - USA Market Overview

Austrade - USA Market Profile

EU Chafea - USA Market Overview

DFAT - US Country Brief

DFAT - US Market Insights

Enterprise Singapore - USA Market Profile

HKTDC Research - USA Market Profile

Santandar Trade Markets - USA Market Overview

CONSUMER INSIGHTS

GWI - US Consumer Snapshot

Raydiant - The State of Consumer Behaviour in the US

Santandar Trade Markets - Reaching the American Consumer

CATEGORY & CHANNEL INSIGHTS

Euromonitor International - USA Fish & Seafood Category Overview

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

International Trade Centre - Market-Specific Trade Data

McKinsey & Company - The State of Grocery Retail 2021 - North America

National Restaurant Association - The State of the Restaurant Industry 2021

Seafish UK - USA Export Guide

MARKET ACCESS INSIGHTS

UNCTAD - USA Investment Policy Hub

USDA - US FDA Guidance & Regulation

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

Contact Us

For more information please contact Seafood Industry Australia:

Julie Willis

Trade Export Manager

julie@seafoodindustryaustralia.com.au

info@seafoodindustryaustralia.com.au

Websites:

www.seafoodindustryaustralia.com.au

www.greataustralianseafood.com.au