



# India Market Summary & Category Data for Fish & Seafood - Barramundi





# 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.





# Economic Indicators

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- GDP (USD Billion): **2,593**
- GDP per capita (USD): **1,877**
- Currency: **Indian Rupee (INR)**
- Exchange Rate: **1 INR = 0.019 AUD (19/01/22)**
- Mercer's 2019 Quality of Living Ranking (2020 report not released due to COVID-19): Hyderabad - **143rd**
- Human Development Index: **0.645** and ranked **131st**
- Logistics Performance Index: **3.18** and ranked **44th**
- Ease of Doing Business Rankings: **63rd**

*Source: World Bank, Mercer, IMF, UN Investment Policy Hub*

- **Trade Agreements:**
  - India is currently a partner to a relatively small amount of Bilateral Investment Treaties (BITs) for a country of its size, with only eight in force.
  - India is party to a sizable amount of Treaties with International Provisions (TIPs), with nine currently in force. One of these, the ASEAN-India Framework Agreement, includes Australia and commits these two nations to enhanced economic co-operation.
  - The ASEAN-India Investment Agreement, however, is not in force despite being signed in 2014. This agreement, upon implementation, would establish a Regional Trade and Investment area between the signatories.

*Source: <https://investmentpolicy.unctad.org/country-navigator>*



# Demographic Indicators

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- Total Population (million): **1,380**
- Expatriate Population (million): **5.2**
- Population Growth: **0.99%**
- Median Age: **28.7**
- Urban Population: **34%**
- **Population Ethnicity:**
  - Indo-Aryan 75%
  - Dravidian 20%
  - Others (including Austroasiatic and Sino-Tibetan)
- **Dominant Religious Groups:**
  - Hindu 79.8%
  - Muslim 14.2%
  - Christian 2.3%
  - Sikh 1.7%
  - Other (including Buddhist, Jain) 2%

*Source: Pew Research, UN, MacroTrends, CIA World Factbook, Encyclopedia Britannica*



# Consumer Behaviour & Societal Trends

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## Key Trends:

- Over the last few decades, relatively high and consistent increases in consumer purchasing power have led India to be forecasted as the third-largest consumer market in 2030. Poverty still remains a large issue as more than two-thirds of the population lives on less than \$2 USD a day.
- The large crisis enveloping India in 2021 due to the second wave of COVID-19 infections has led Indians' income levels to decrease, and Indians now spend a higher percentage of their income on essential goods such as medical products and groceries. Prior to the crisis, Indians were most concerned with product quality as opposed to cost.
- Consumers in India are increasingly digitising with regards to Food & Beverage purchases to support the need for social distancing. Food delivery apps and online grocery delivery platforms have consequently seen an explosion in user growth rates.
- Indian consumers, already more prone to prefer local brands relative to other consumer groups worldwide, are engaging with this phenomenon more and more due partly to consumer desires to support the struggling national economy.
- The dire medical consequences suffered since the beginning of the COVID-19 pandemic have led local consumers to increasingly adopt organic diets. This is illustrated by almost 85% of surveyed consumers believing they are shopping in a more health-conscious manner, a trend that is driven by millennials.
- The caste system influences consumer spending patterns greatly, especially in rural areas, as higher-ranking groups such as the Brahmins often spend much more on luxury goods. This system also means that group identity behaviours hold strong, and therefore many Indians will make purchases based on word of mouth from peers.

- The percentage of household consumption that is spent on Food & Drink is much higher in India, at approximately one-third of consumption. Much of this goes towards constant purchases of the same brand because Indians are some of the most brand-loyal consumers globally with 47% remaining loyal even after a bad experience with a product.
- The vast majority of shopping in India, especially for Food & Beverage products, occurs at a very localised level with independent “kirana” neighbourhood stores leading in popularity, comprising 88% of retail stores nationwide.
- Consumers in India are increasingly taking on debt to fund their purchases through credit cards and fintech payment platforms, demonstrated by the total level of household debt doubling in 2017 alone.

*Source: KPMG, Santandertrade, MINT, SOS Children’s Villages, BBC, The Economic Times, WARC*

### Digital Adoption:

- Figures from 2020 indicate that around half of the Indian population is connected to the internet, a rate that has increased consistently over the last few decades but is forecast to fall in 2021.
- There were an estimated 400 million social media users in India as of January 2020, generating a penetration rate of 29%.
- On average, Indians who use social media spend 2 hours and 24 minutes using the services a day. Those with the internet will spend about 6 hours and 30 minutes using internet services.

*Source: Digital in 2020 Report*







# Grocery Retail Channel Developments

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## Key Trends:

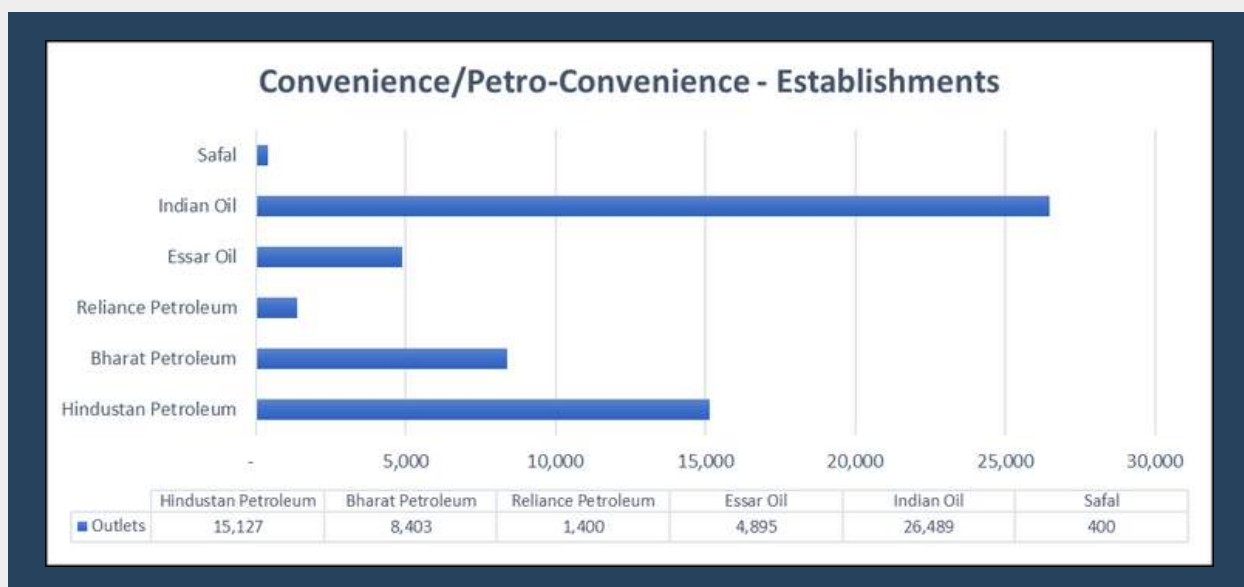
- In order to maximise value for money amongst widespread financial pressures present in India, consumers are shifting away from the popular behaviour of purchasing only from a favourite local grocery store towards often visiting multiple stores in their neighbourhood.
- Online grocery purchases have skyrocketed in volume and value throughout the COVID-19 pandemic, particularly whenever infection rates have formed a new wave. The biggest beneficiary of this trend has been Reliance Retail, a supermarket chain that's online grocery service has led the company to be ranked the 2nd fastest-growing retailer in the world by Deloitte.
- The biggest traditional grocery retail chains are the government-owned Mother Dairy and Safal outlets, created by the Indian government to increase the consumption of dairy products nationwide. However, because this market is very fragmented with many small, independent retailers, these businesses comprise only a small percentage of total market value.
- Convenience stores in India have consistently recorded double-digit growth in sales value over the last few years and this market is dominated by locally-owned companies. Compared to "kirana" stores, convenience stores in India are centred in major cities and have a larger layout.
- Hypermarkets, mainly due to the sporadic nature of the outlets' locations, have suffered the most of all grocery retail channels due to the COVID-19 pandemic. These businesses, in an attempt to recover lost sales, are increasingly partnering with food delivery services in an attempt to capture sales from the growing grocery delivery market.
- The surge in grocery delivery orders during the second wave of the COVID-19 pandemic in India has led online systems to become overloaded, and major retailers, such as Amazon India and Flipkart, have been forced to implement limits on orders.

- Many states have only allowed the sales of essential goods during successive COVID-19 waves in India and, therefore, much of a business' profitability is currently highly dependent on the products being sold. Consequently, larger hypermarkets and supermarkets that stock many non-essential goods are suffering greatly.
- Major retailers such as Reliance Retail and Amazon are racing to incorporate "kirana" stores into their supply chains as these small retail stores are forecast to be worth USD \$1.5 trillion by 2030. The motivation is for customers to be able to access the same cheap prices for Food & Drink products sold in "kiranas" in online stores instead, while independent retailers can order their inventories through an embedded portal.

### Grocery Retailing Brand Outlets:



### Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor, MINT, Wordbank, Financial Times, Bloomberg





# Foodservice Channel Developments

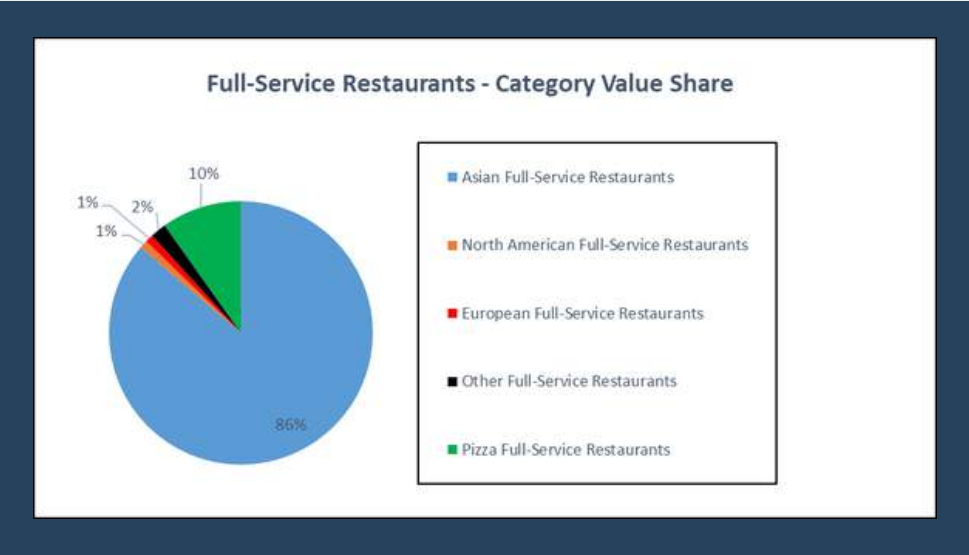
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## Key Trends:

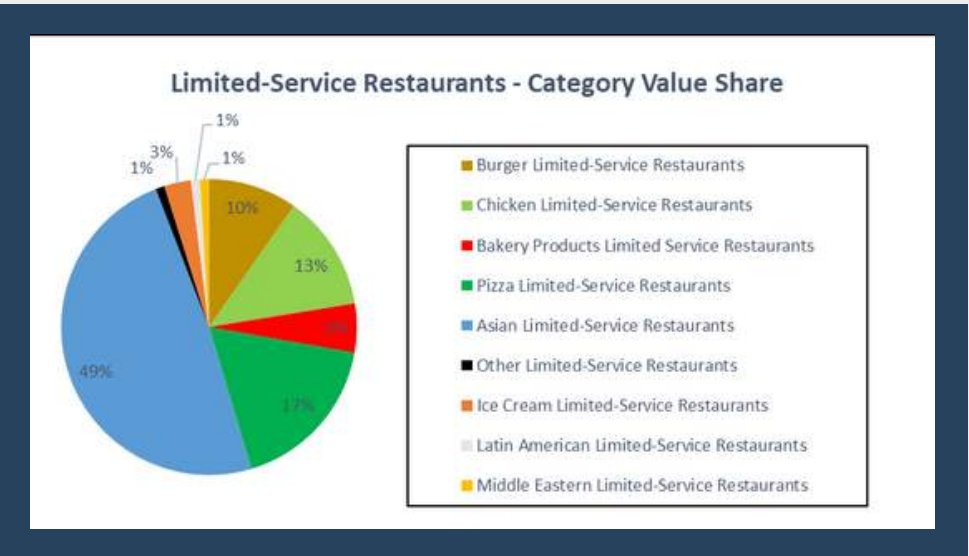
- Restaurant profits have suffered greatly during the COVID-19 pandemic, particularly during the worst parts of the first and second waves of infections in India because the government, for the most part, banned eating out.
- Independent restaurants have suffered the most as these businesses have access to less capital to withstand short-term losses. Furthermore, large chains have been able to utilise their relationships with food aggregators to offer discounts to increasingly price-conscious Indian consumers.
- The pandemic has caused many major restaurants, particularly in big cities, to partner with food delivery services and adapt menus to include more in-home dining-suited items to capitalise on the growing trend of in-home dining.
- Many stringent regulations, unrelated to the pandemic, are imposed upon restaurants country-wide, with the stringency of these regulations differing greatly by region. In some Indian states, up to 20 regulations must be followed in order to legally sell a sandwich. This had led restaurant industry bodies to demand an entirely new regulatory body.
- To maintain enough consumer demand for eating out to ensure business viability, restaurants are progressively adding value to their dining experiences by showcasing live performances and celebrations of religious festivals.
- Domino's Pizza and Pizza Hut have been the leading restaurant chains in terms of sales value in recent years, with Domino's leading the limited-service sector and Pizza Hut leading the full-service sector. This is mainly due to the behavioural shift whereby Indians have increasingly relied on well-trusted foodservice brands in the midst of the uncertainty generated by the COVID-19 pandemic.
- There is a growing group of restaurants offering "fast-casual dining", whereby limited-service restaurants offer a more wholesome dining experience than their foodservice channel counterparts. This trend is largely being led by foreign chain restaurants such as Shake Shack and McDonald's.

- Gastro pubs have been rising in prominence across India over the last decade, with the dining experience fusing aspects of drinking at a normal bar and fine dining, with the main drawcards for customers being carefully-selected and unpredictable dishes.
- Ghost restaurants are on the rise in India, with skyrocketing food delivery demand creating businesses that solely operate kitchens to serve at-home dining. These businesses exist across all culinary types and save restaurant owners the burden of having to find high-quality locations for their restaurant, equipment for dining areas, etc.
- As vegetarianism is an extremely popular diet choice in Hindu-majority parts of India, a key to foreign fast-food chains' consistent double-digit sales growth has been adapting menu items popular overseas to the vegetarian diet.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor, The Indian Express, NDTV Food, restaurantindia, YOURSTORY

# Food & Drink e-Commerce Channel Developments

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## Key Trends:

- Food & Drink e-commerce recorded the highest sales value in 2020 of any e-commerce channel in India mainly due to the explosion in demand for usage of food delivery apps and grocery delivery services.
- Growing income levels, longer working hours, and digitisation across India in recent decades have meant that e-commerce growth in the Food & Drink channel has been large and consistent, with this trend expected to continue beyond the COVID-19 pandemic.
- As the logistical capacity and popularity of food delivery businesses have grown greatly since 2019, regional areas of India are beginning to be serviced by these firms and this is consequently hastening digitisation across India.
- E-commerce businesses with an “inventory-led model”, whereby the business sources its products directly from the supplier to maintain an inventory before purchases are made, have fared much better throughout the COVID-19 pandemic as opposed to “hyperlocal” businesses which do not stock inventory.
- The oligopoly-like nature of the food delivery market in India has inspired many dominating businesses to engage in anti-competitive behaviours such as charging exorbitant commissions and predatory discounts.
- E-commerce businesses are increasingly partnering with firms from the “buy-now-pay-later” sector to broaden the payment methods available to customers, thereby capitalising on growing consumer debt and consumer preferences for convenience when purchasing Food & Drink products. Cash payments upon delivery, however, remain the most popular form of payment.
- The most purchased food items throughout the COVID-19 pandemic are, by far, dry foods such as flour, pasta, and rice, with 79% of surveyed consumers reporting having made a purchase of this type in a given month. Condiments are also very popular with 50% of surveyed respondents reporting a purchase, demonstrating the importance of eating at home for Indians and the consequent tendency to purchase food items mostly to aid in cooking.



- Discussions on social media are a major emerging influence on Indians' decisions as to where and what to buy on online grocery delivery platforms. Reviews left on dedicated sites such as Zomato and Yelp are also very important.

#### Key E-tailers:

- The largest Food & Drink internet retailer in India, Flipkart, had a majority share of the business acquired by Walmart in 2018, marking the biggest purchase of an e-commerce company in history.
- Major e-commerce retailers are engaging with the trend towards grocery delivery but setting up their own subsidiary companies to focus on this growing market. This has been demonstrated by the likes of Amazon opening Amazon Pantry and Flipkart opening Flipkart Supermarket in 2018.
- Food aggregators Swiggy and Zomato control 90% of the food delivery market, the latter of which bolstered its market power through a purchase of UberEats India in 2020.

*Source: Euromonitor, WORDBANK, Indiaretailing, RAKUTENINSIGHT, Deloitte*

## Seafood Consumption in India

- Fish and seafood supply per person in India is valued at 6.90 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:

- Food Safety and Standards Authority of India: Creates regulations regarding food safety and enforces supervision of food safety practices within India.
- Ministry of Commerce and Industry: Creates and implements trade policy.
- Directorate General of Foreign Trade: Creates the guidelines and principles for importers.
- Central Board of Excises Customs: Deals with the payment of customs duties.

## Product Registration/Import Procedure:

- All importers must register with the Directorate General of Foreign Trade to get an import license and an IEC number.
- Upon arrival of the goods in India, importers must provide a filled-out Bill of Entry form and a phytosanitary certificate (if importing agricultural products).
- Pay customs duties and an additional customs handling fee of 1% of imported goods value.
- Customs inspections occur.

## Documentation Required:

- Import license
- Bill of Entry form
- Bill of Lading
- Packing list
- Invoice

## General Labelling Requirements:

- Must be in either Hindi or English (the latter is preferred)
- Net quantity
- Name and description of product
- Ingredient list
- Name and address of importer or packager/manufacturer
- Batch lot
- Date of production
- Expiry date
- Country of manufacture (if preferential import duties are in force)
- Indication of whether the product is vegetarian
- Maximum retail price
- Declaration of colourings (if any)
- Declaration of irradiated materials (if any)

### Packaging Requirements:

- Labels must clearly be displayed on the outside of the package.
- Wooden packaging must be treated by fumigation and heat, before being marked with certification of this process.
- Needs to guard against severe heat and humidity during India's summer months.

### Non-Tariff Barriers:

- Import quotas for many food products such as green peas.
- Monopoly practises by oligopoly firms in certain Indian food markets.

### Tariffs Levied:

- The Central Board of Excises Customs' Customs Duty Calculator can be used to understand which import duties are relevant to the product being imported.
- The average tariff rate on Australian products imported is 13.4%. Tariff on lentil imports was recently slashed from 33% to 11%.

*Source: USDA Food and Agricultural Import Regulations and Standards Country Reports [FAIRS], EximGuru, India-Briefing, IndiaFilings*







## Category Data

### *Fish and Seafood in India*

#### Key Trends:

- India's COVID-19 lockdown had a severe effect on the fish and seafood industry's sales, primarily due to logistics problems. During 2020's second quarter which was also peak season for fish farming, there were shortages in labour supply, as well as closed interstate borders and month-long restrictions on fishing. This led to a severe shortage in the supply of fish. However, this was witnessed on a global scale too, leading to order cancellations, a delay in payments, a dearth in new and repeat orders, as well as the overall slowdown in cargo movement. The last week of March saw multiple seafood processing plants shutting down due to the inability to work during lockdown periods.
- Even as lockdown restrictions eased, there was a severe shortage in labour supply, leading many seafood processing plants to operate at reduced capacities. The ripple effect of this was also seen on associated businesses such as feed suppliers and packaging companies. March to June is generally considered the peak season for fish and shrimp farming. However, labour shortages and the scarcity of feed, fertilisers, and other necessary resources led to lower than usual levels of production.
- Irrespective of their essential commodity status, fish and seafood marketing faced an uphill task, since Indian consumers were hesitant to visit local wet markets, which is where most Indians purchase their produce and fish. This behaviour was seen even after the government lockdown restrictions were lifted. With more consumers looking for convenience, better hygiene practices, proper packaging, and timely delivery, meat, and seafood websites within the Indian e-commerce sector were able to achieve high year-on-year sales growth. Companies such as Licious, Let's Meat, Meatigo, and Zappfresh, achieved notable growth in order purchases.
- Hitting the eastern coast of India in early 2020, Cyclone Amphan caused extensive damage to dams and flooded several areas with saltwater, resulting in the death of freshwater fish like katla and rohu. Amphan thus severely affected the several hundred thousand people who depend on pisciculture for their livelihood. With huge waves of saltwater from the sea crashing into ponds and other water bodies that were being used for fish farming, most small businesses were decimated, causing widespread losses.

- Apart from promoting production, institutions such as Marine Products Exports Development Authority (MPEDA), National Fisheries Development Board (NFDB), and National Cooperative Development Corporation (NCDC) are helping to minimise post-harvest losses, and offer high standards of hygiene and sanitisation, thus increasing the revenue and enhancing the employment opportunities in the fisheries market.
- India's government has introduced measures to help the fish and seafood industry recover from this period of loss. Launched in September 2020 in 21 states, the PM Matsya Sampada Yojana (PMMSY) has a budget of INR 20,050 crore to be spent until FY 2024-2025. This initiative focuses on developing fish production, increasing the income of fishermen and fish farmers, increasing fish exports, reducing post-harvest losses, and generating employment opportunities in fisheries and related segments. The Prime Minister of India also introduced the e-Gopala App, which aims to become a tool that farmers can use to gain access to a breed improvement marketplace and information portal.
- Such government programs have been launched in the hope of strengthening the industry's infrastructure by developing stronger supply chains and better cold storage and warehouses. By extending short-term working capital through Kisan credit cards under PM Kisan Samman Nidhi (PM KISAN), the government is extending help to fishermen and the Indian fishery sector in general.
- The fish and seafood industry continues to be an important sector as fisheries are the primary source of all wild-caught protein. This remains particularly true as fish and seafood are rich in protein, healthy fats and other nutrients like omega-3 fatty acids, vitamin D, iodine, and calcium.
- Indian households have increased their consumption of fish and seafood; this is expected to continue in the coming years, especially with the increasing formalisation of the unorganised market. Urban areas are also expected to see a rise in demand as most consumers are trending towards healthier and more nutritious food alternatives.
- There is a high potential scope to organise the mostly unorganised Indian market with efficient distribution channels that would lead to increased accessibility of fish and seafood. If organised retail markets can offer stringent hygiene and quality control, effective product processing and packaging, better temperature control and transportation, and overall enhanced supply chains, they have the opportunity to gain a presence in India's fish and seafood market.

Sector	Country	Category	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	India	Chilled Raw Packaged Fish & Seafood - Processed	2021	2.28	2.28
			2026	2.78	4.11
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	2021	4.31	2.94
			2026	5.28	4.12
		Dried Fish & Seafood	2021	1.53	3.69
			2026	1.84	3.77
		Fresh Fish & Seafood (Counter)	2021	20.44	4.23
			2026	23.89	3.17

Source: GlobalData, 2021

# ITC - Trade Data

## Fresh or Chilled Fish, N.E.S. in India

India - Trade Data - HS Code 030289 Fresh or chilled fish, n.e.s.

(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	20,640	3,149	-10	103	70
1	Bangladesh	15,505	2,455	-30	139	80
2	Myanmar	5,133	693	439	80	76
3	Senegal	2	0	-	-	-
4	Kuwait	-	-	-	-	-
5	Nepal	-	-	-	-	-
6	UAE	-	-	-	-	-
7	Hong Kong	-	-	-	-	-
8	Singapore	-	-	-	-	-
9	China	-	-	-	-	-
10	UK	-	-	-	-	-

AUS - Trade Data - HS Code 030289 Fresh or chilled fish, n.e.s.

(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	3,089	233	55	-13	-17
1	Italy	2,505	181	77	0	-1
2	Hong Kong	147	19	-30	-25	-34
3	UK	142	9	-	-50	-17
4	Spain	99	6	938	111	49
5	New Caledonia	96	8	41	-	37
6	Japan	53	7	-19	-35	-32
7	France	8	1	-93	-	-
8	Indonesia	8	0	-	-	-
9	Malaysia	7	1	-71	-10	-4
10	Thailand	6	0	-15	57	-

Source: ITC Trade Map, 2022



# ITC - Trade Data

## Frozen Fish, N.E.S. in India

India - Trade Data - HS Code 030389 Frozen fish, n.e.s.

(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	12,665	2,711	-30	26	24
1	Myanmar	11,527	2,092	-26	33	34
2	China	766	415	724	-	137
3	Area Nes	219	130	-	-45	18
4	Indonesia	88	58	-84	-43	-35
5	UK	32	6	-	-	-
6	Bangladesh	32	10	-98	-	-
7	Taipei	-	-	-	-	-
8	USA	-	-	-	-	-
9	Kuwait	-	-	-	-	-
10	Vietnam	-	-	-	-	-

AUS - Trade Data - HS Code 030389 Frozen fish, n.e.s.

(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	7,571	2,308	-21	3	-2
1	Vietnam	4,638	1,308	-6	1	0
2	New Zealand	1,198	360	-41	188	116
3	China	490	107	-72	41	43
4	Hong Kong	380	26	-	18	126
5	Papua New Guinea	266	213	96	36	25
6	Fiji	213	210	38	3	0
7	Thailand	161	25	-29	-31	-46
8	India	94	3	-	-	-
9	Nauru	59	6	151	121	57
10	Saudi Arabia	56	50	-8	-18	-12

Source: ITC Trade Map, 2022

# ITC - Trade Data

## Fresh or Chilled Fillets of Fish, N.E.S. in India

India - Trade Data - HS Code 030449 Fresh or chilled fillets of fish, (Import): n.e.s.

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	4	0	-75	-58	-
1	The Netherlands	4	0	-	-	-
2	UK	-	-	-	-	-
3	Algeria	-	-	-	-	-
4	Spain	-	-	-	-	-
5	France	-	-	-	-	-
6	Sri Lanka	-	-	-	-	-
7	Nepal	-	-	-	-	-
8	Germany	-	-	-	-	-
9	Canada	-	-	-	-	-
10	Ireland	-	-	-	-	-

AUS - Trade Data - HS Code 030449 Fresh or chilled fillets of fish, (Export): n.e.s.

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	1,453	72	12	2	2
1	Germany	644	31	59	2	3
2	UK	412	20	81	9	11
3	Spain	239	11	48	-5	-5
4	South Korea	76	4	3	-	-
5	Singapore	26	2	-91	96	-
6	UAE	19	1	96	-	-
7	Italy	19	1	-	-	-
8	Japan	17	3	-	-	-
9	Switzerland	2	0	-	-59	-
10	The Philippines	-	-	-	-	-

Source: ITC Trade Map, 2022



# ITC - Trade Data

## Frozen Fish Fillets, N.E.S. in India

India - Trade Data - HS Code 030489 Frozen fish fillets, n.e.s.

(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	113	7	-	-	-
1	Japan	61	4	-	-	-
2	Canada	44	3	-	-	-
3	The Netherlands	8	1	-	-	-
4	USA	-	-	-	-	-
5	Italy	-	-	-	-	-
6	Spain	-	-	-	-	-
7	Portugal	-	-	-	-	-
8	UAE	-	-	-	-	-
9	Mauritius	-	-	-	-	-
10	Greece	-	-	-	-	-

AUS - Trade Data - HS Code 030489 Frozen fish fillets, n.e.s.

(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	14,513	1,274	53	30	43
1	The Netherlands	7,577	501	86	20	28
2	USA	4,253	302	-8	697	41
3	New Zealand	1,688	367	5,467	230	161
4	China	481	29	532	-	103
5	Hong Kong	238	45	3,140	103	-
6	Nauru	54	12	-17	23	29
7	Papua New Guinea	53	6	1,034	47	32
8	Indonesia	52	5	-	-	-
9	India	49	1	-	-	-
10	Singapore	41	2	17	32	19

Source: ITC Trade Map, 2022



# ITC - Trade Data

## Fresh or Chilled Sea Bass, N.E.S. in India

India - Trade Data - HS Code 030284 Fresh or chilled sea bass, n.e.s. [\(Import\):](#)

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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

No data available

AUS - Trade Data - HS Code 030284 Fresh or chilled sea bass, n.e.s. [\(Export\):](#)

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	0	-	-	-
1	Singapore	3	0	-	-	-
2	Italy	-	-	-	-	-
3	USA	-	-	-	-	-
4	Spain	-	-	-	-	-
5	France	-	-	-	-	-
6	Portugal	-	-	-	-	-
7	UK	-	-	-	-	-
8	The Netherlands	-	-	-	-	-
9	Israel	-	-	-	-	-
10	Russia	-	-	-	-	-

Source: ITC Trade Map, 2022

# ITC - Trade Data

## Frozen Sea Bass, N.E.S. in India

India - Trade Data - HS Code 030384 Frozen sea bass, n.e.s.

(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	43	4	187	-57	-43
1	Singapore	38	4	192	-59	-43
2	The Netherlands	6	0	-	-	-
3	The Maldives	-	-	-	-	-
4	Turkey	-	-	-	-	-
5	Spain	-	-	-	-	-
6	China	-	-	-	-	-
7	Taipei	-	-	-	-	-
8	Nicaragua	-	-	-	-	-
9	USA	-	-	-	-	-
10	Malaysia	-	-	-	-	-

AUS - Trade Data - HS Code 030384 Frozen sea bass, n.e.s.

(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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

No Data Available

Source: ITC Trade Map, 2022

## ITC - Trade Data

### *Frozen Freshwater and Saltwater Fish, N.E.S. in India*

India - Trade Data - HS Code 030379 Frozen Freshwater and Saltwater [\(Import\)](#):  
Fish, n.e.s.

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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

AUS - Trade Data - HS Code 030379 Frozen Freshwater and Saltwater [\(Export\)](#):  
Fish, n.e.s.

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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2022



# ITC - Trade Data

## Fresh or Chilled Nile Perch, N.E.S. in India

India - Trade Data - HS Code 030279 Fresh or chilled nile perch, (Import):  
n.e.s.

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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

No data available

AUS - Trade Data - HS Code 030279 Fresh or chilled nile perch, n.e.s. (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	258	20	-65	26	14
1	South Korea	254	20	-66	26	14
2	USA	4	0	-	-	-
3	Belgium	-	-	-	-	-
4	The Netherlands	-	-	-	-	-
5	Portugal	-	-	-	-	-
6	France	-	-	-	-	-
7	Canada	-	-	-	-	-
8	Spain	-	-	-	-	-
9	UAE	-	-	-	-	-
10	Italy	-	-	-	-	-

Source: ITC Trade Map, 2022

# ITC - Trade Data

## Frozen Fillets of Nile Perch, N.E.S. in India

India - Trade Data - HS Code 0030463 Frozen fillets of nile perch, (Import):  
n.e.s.

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)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

No data available

AUS - Trade Data - HS Code 030463 Frozen fillets of nile perch, n.e.s. (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	0	-	-	-
1	Papua New Guinea	3	0	-	-	-
2	Uganda	-	-	-	-	-
3	Vietnam	-	-	-	-	-
4	Tanzania	-	-	-	-	-
5	Romania	-	-	-	-	-
6	Israel	-	-	-	-	-
7	Greece	-	-	-	-	-
8	Spain	-	-	-	-	-
9	Italy	-	-	-	-	-
10	UAE	-	-	-	-	-

Source: ITC Trade Map, 2022

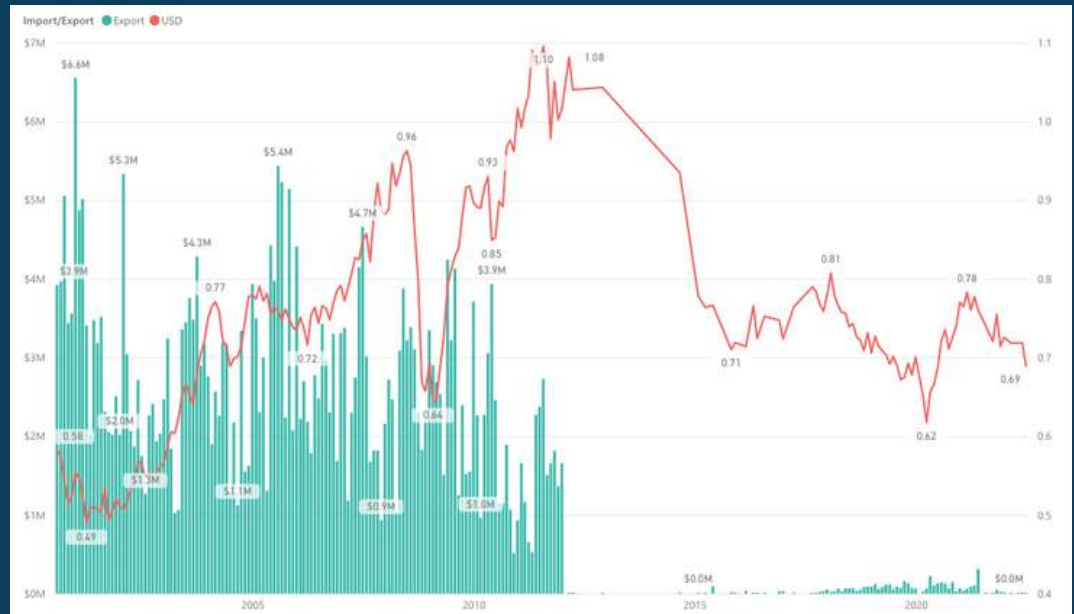


# FRDC - Trade Data

## Barramundi Exports - Value

AUS - Trade Data - Species: Nile Perch & Sea Bass

(Exports):



Value of Exports - Nile Perch & Sea Bass

Commodity Description	Value
Frozen scallops (incl. queen scallops of the genera Pecten, Chlamys or Placopecten), whether in shell or not	\$363,589,962
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$3,240,547
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	\$532,375
Frozen fillets of Nile perch (Lates niloticus)	\$141,563
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$100,397
Frozen sea bass (Dicentrarchus labrax, Dicentrarchus punctatus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$37,068
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$32,150
Frozen seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$15,950
Fresh or chilled fillets of Nile Perch (Lates niloticus)	\$6,067
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$3,587

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	\$233,175,854
Singapore	\$80,736,197
Malaysia	\$19,146,425
France	\$13,717,250
China	\$6,503,715
Indonesia	\$2,039,438
Korea Republic of	\$1,965,958
Korea, Republic of	\$1,943,960
Japan	\$1,683,908
New Zealand	\$1,381,373
Philippines	\$1,240,806
Papua: New Guinea	\$627,326
India	\$550,737
United States of America	\$471,297
Vietnam	\$429,551

Leading Export Destinations - Value

State	Value
QLD	\$179,406,406
WA	\$161,798,984
VIC	\$13,809,613
TAS	\$4,533,302
Foreign (re-export)	\$4,141,952
SA	\$2,277,839
NSW	\$1,630,416
NT	\$101,154

Export Value by State

Source: FRDC, 2022

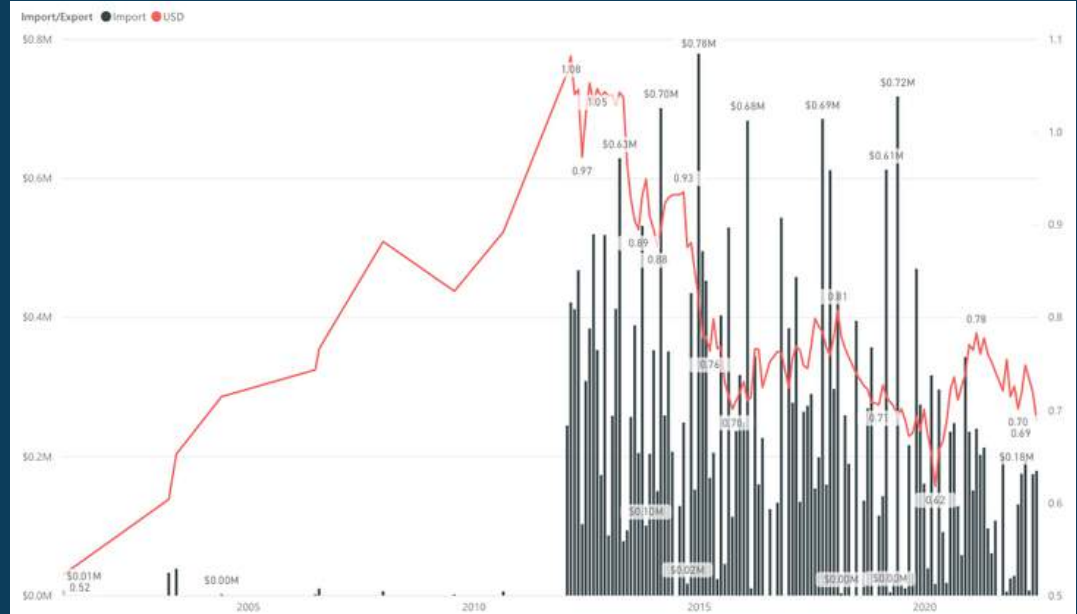


# FRDC - Trade Data

## Barramundi Imports - Value

AUS - Trade Data - Species: Nile Perch & Sea Bass

(Imports):



Value of Imports - Nile Perch & Sea Bass

Commodity Description	Value
Frozen fillets of Nile perch ( <i>Lates niloticus</i> )	\$24,722,636
Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.) (excl. fillets)	\$1,797,086
Frozen seabass ( <i>Dicentrarchus</i> spp.) (excluding fillets and other meat of HS 0304)	\$1,389,720
Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$1,010,270
Fresh or chilled fillets of Nile Perch ( <i>Lates niloticus</i> )	\$512,853
Fresh or chilled Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$110,243
Frozen sea bass ( <i>Dicentrarchus labrax</i> , <i>Dicentrarchus punctatus</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	\$102,302
Fresh or chilled Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.) (excl.)	\$50,866
Frozen seabass ( <i>Dicentrarchus</i> spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$13,380
Fresh or chilled seabass ( <i>Dicentrarchus</i> spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	\$11,128

Value of Imports - Commodity Breakdown

Country	Value
Tanzania	\$17,353,986
Kenya	\$3,840,768
Tanzania, United Republic of	\$2,249,621
Taiwan	\$2,184,959
Uganda	\$1,743,685
Myanmar	\$1,035,802
Vietnam	\$769,393
Indonesia	\$152,830
Bangladesh	\$135,618
Mauritius	\$88,674
Korea, Republic of	\$67,695
New Zealand	\$55,339
South Africa	\$21,944
Malaysia	\$7,524
Turkey	\$6,738

Leading Import Sources - Value

State	Value
NSW	\$13,848,872
QLD	\$8,707,684
VIC	\$5,852,343
WA	\$1,179,328
SA	\$132,257

Import Value by State

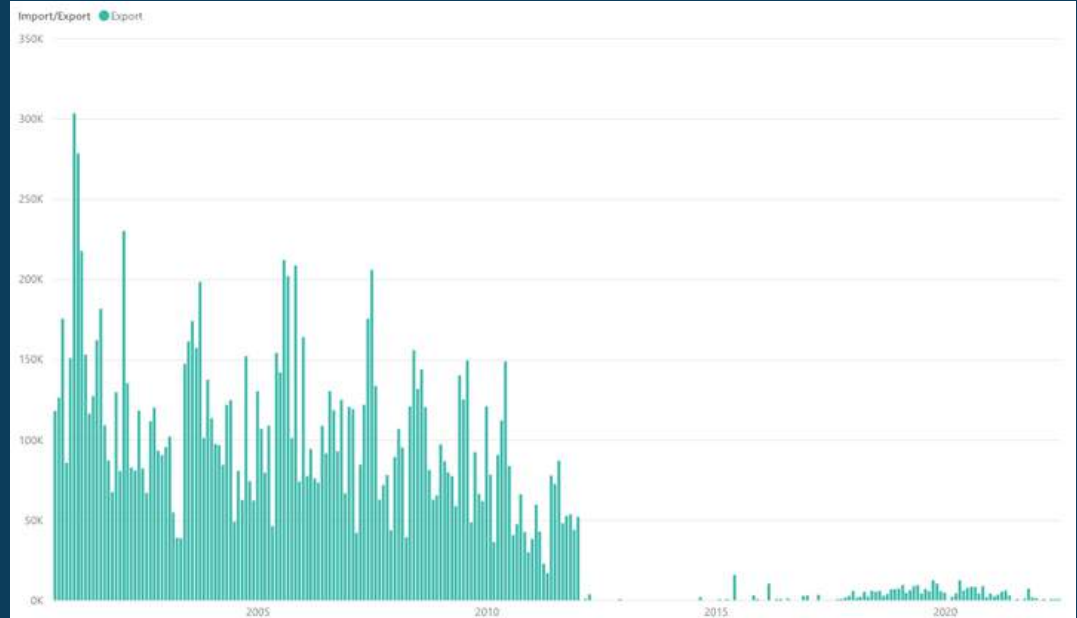
Source: FRDC, 2022

# FRDC - Trade Data

## Barramundi Exports - Volume

AUS - Trade Data - Species: Nile Perch & Sea Bass

(Exports):



Volume of Exports - Nile Perch & Sea Bass

Species, Commodity Description	Quantity
Seabass, Frozen scallops (incl. queen scallops of the genera Pecten, Chlamys or Placopecten), whether in shell or not	14,288,909
Nile Perch, Fresh or chilled Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	227,526
Nile Perch, Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	27,610
Nile Perch, Frozen fillets of Nile perch ( <i>Lates niloticus</i> )	22,466
Nile Perch, Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	10,490
Seabass, Fresh or chilled seabass ( <i>Dicentrarchus spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	10,171
Seabass, Frozen sea bass ( <i>Dicentrarchus labrax</i> , <i>Dicentrarchus punctatus</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	3,424
Seabass, Frozen seabass ( <i>Dicentrarchus spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	1,740
Nile Perch, Fresh or chilled fillets of Nile Perch ( <i>Lates niloticus</i> )	588
Seabass, Fresh or chilled seabass ( <i>Dicentrarchus spp.</i> ) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	159

Volume of Exports - Commodity Breakdown

Country	Quantity
Hong Kong	8,766,020
Singapore	3,001,006
Malaysia	762,840
France	647,537
China	588,726
Korea, Republic of	127,709
New Zealand	127,136
Korea Republic of	126,228
Indonesia	78,895
Japan	61,323
Vietnam	40,147
Philippines	40,001
Papua New Guinea	37,695
Thailand	34,662
South Africa	34,070

Leading Export Destinations - Volume

State	Quantity
QLD	6,836,743
WA	6,268,210
VIC	751,268
Foreign (re-export)	314,021
TAS	227,419
SA	114,469
NSW	77,953
NT	3,000

Export Volume by State

Source: FRDC, 2022

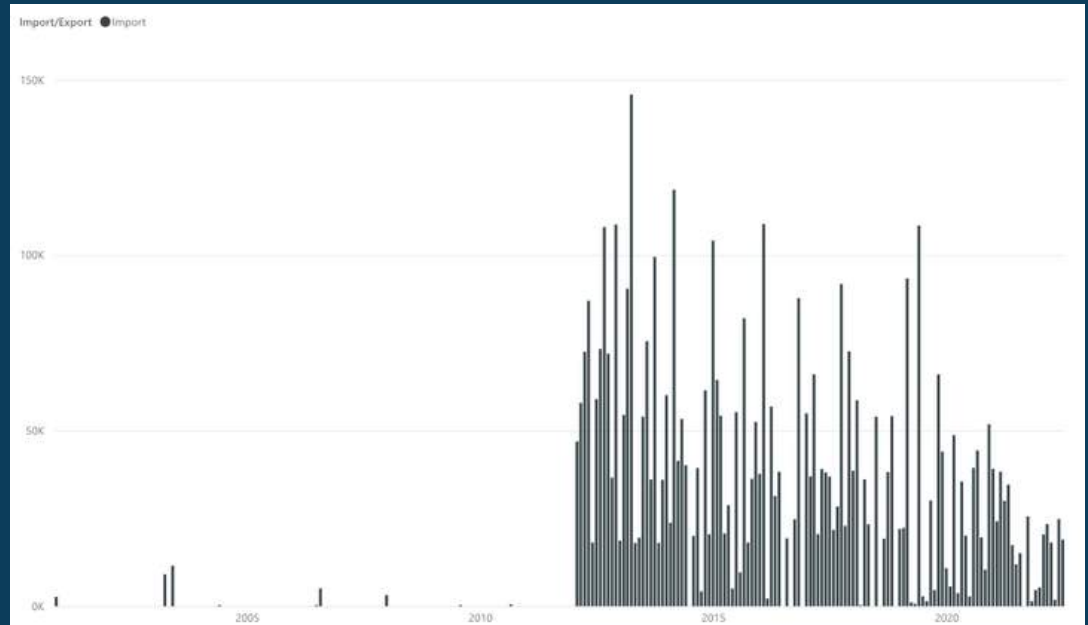


# FRDC - Trade Data

## Barramundi Imports - Volume

AUS - Trade Data - Species: Nile Perch & Sea Bass

(Imports):



Volume of Imports - Nile Perch & Sea Bass

Commodity Description	Quantity
Frozen fillets of Nile perch ( <i>Lates niloticus</i> )	3,893,503
Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets)	289,411
Frozen Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	231,593
Frozen seabass ( <i>Dicentrarchus spp.</i> ) (excluding fillets and other meat of HS 0304)	203,331
Fresh or chilled fillets of Nile Perch ( <i>Lates niloticus</i> )	76,952
Frozen sea bass ( <i>Dicentrarchus labrax</i> , <i>Dicentrarchus punctatus</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	32,181
Fresh or chilled Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	17,218
Fresh or chilled Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa spp.</i> ) (excl.)	7,440
Frozen seabass ( <i>Dicentrarchus spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	3,700
Fresh or chilled seabass ( <i>Dicentrarchus spp.</i> ) (excl. fillets and other meat of HS 0304 and livers and roes)	1,036

Volume of Imports - Commodity Breakdown

Country	Quantity
Tanzania	2,788,919
Kenya	559,728
Taiwan	415,566
Tanzania, United Republic of	327,342
Uganda	288,678
Myanmar	157,863
Vietnam	137,561
Indonesia	28,979
Bangladesh	17,314
Mauritius	11,946
New Zealand	7,586
Korea, Republic of	7,504
South Africa	3,500
Malaysia	2,652
Turkey	602

Leading Import Sources - Volume

State	Quantity
NSW	2,157,437
QLD	1,386,015
VIC	970,900
WA	222,998
SA	19,015

Import Volume by State

Source: FRDC, 2022



# FRDC - Trade Data Sourced from FAO

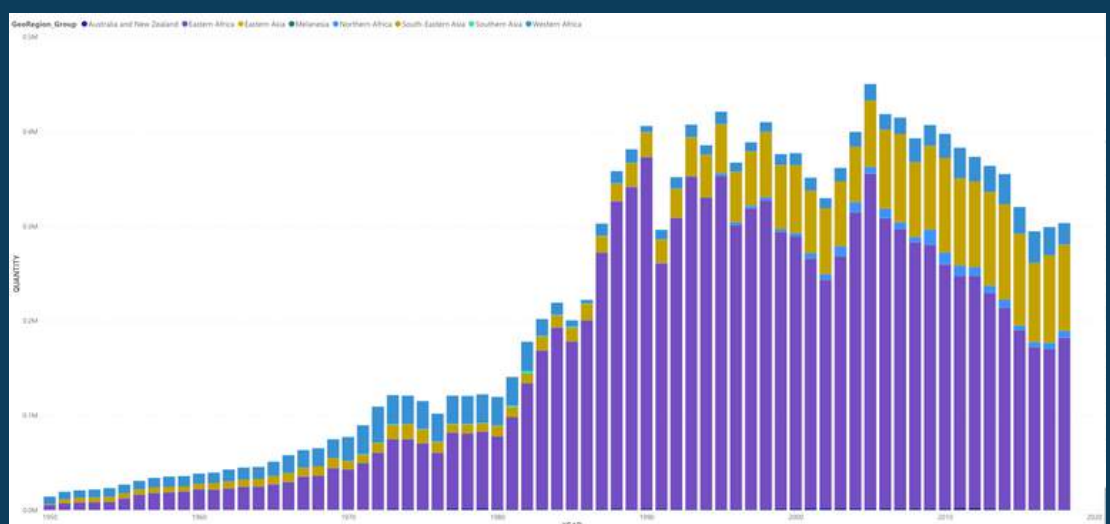
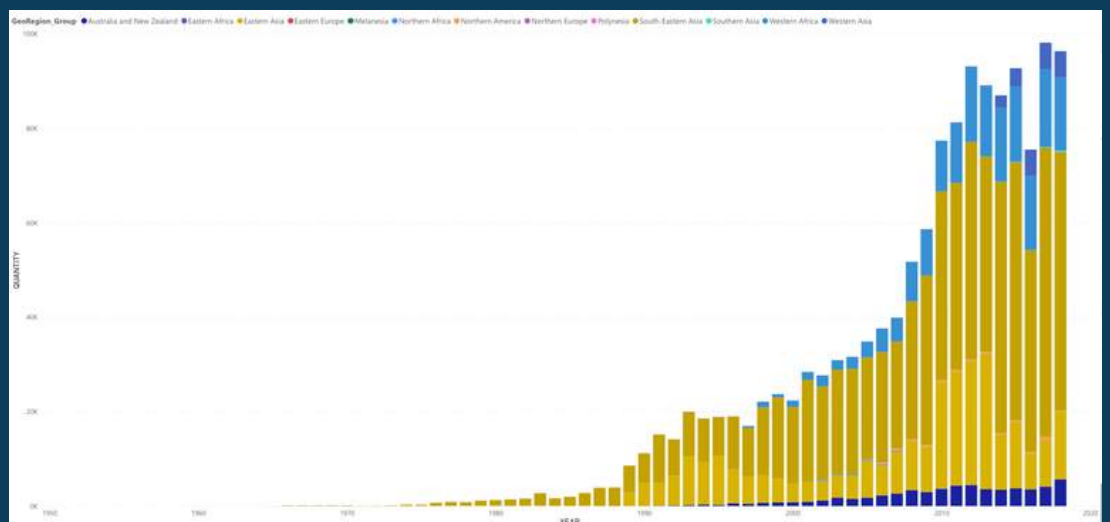
## Food and Agriculture Organization (FAO) Capture Production Quantity - Nile Perch & Barramundi

ISSCAAP Species: Nile Perch & Barramundi

Production

Country Name En	Unit Name	2020
Australia	Tonnes - live weight	868
India	Tonnes - live weight	1 000

Production Volume by ASFIS (Nile Perch & Barramundi) - FAO



Source: FAO, FRDC, 2022

# Additional Resources

## COUNTRY INSIGHTS

[Agriculture and Agri-Food Canada - India Market Overview](#)

[Asialink Business - India Country Profile](#)

[Austrade - India Market Profile](#)

[DFAT - India Country Brief](#)

[Enterprise Singapore - India Market Profile](#)

[EU Chafea - India Market Overview](#)

[FoodExport - India Country Profile](#)

[HKTDC Research - India Market Profile](#)

[Santandar Trade Markets - India Market Overview](#)

[USDA - India Country Guide](#)

## CONSUMER INSIGHTS

[Agriculture and Agri-Food Canada - India Consumer Profile](#)

[GWI - Indian Consumer Snapshot](#)

[Santandar Trade Markets - Reaching the Indian Consumer](#)

## CATEGORY & CHANNEL INSIGHTS

[Agriculture and Agri-Food Canada - India E-Commerce Channel Overview](#)

[Agriculture and Agri-Food Canada - India Seafood Sector Overview](#)

[Agriculture and Agri-Food Canada - India Foodservice Profile](#)

[Euromonitor International - Fish & Seafood Category Overview](#)

[Fisheries Research and Development Corporation \(FRDC\) - Australia-Specific Trade Data](#)

[International Trade Centre - Market-Specific Trade Data](#)

[USDA - India Foodservice Overview](#)

[USDA - India Retail Overview](#)

## MARKET ACCESS INSIGHTS

[Micor - India Fish & Seafood Market Access Requirements](#)

[UNCTAD - Investment Policy Hub India Trade Agreements](#)

[USDA - India Import Regulations & Standards](#)

## OTHER RESOURCES

EFIC

Export Connect Portal

Fitch Solutions

GlobalData

Google Trends

IbisWorld

L.E.K.

Marketline

McKinsey

Mintel

Nielsen

NZTE

Seafish UK

Statista

Trading Economics



# Contact Us

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[www.greataustralianseafood.com.au](http://www.greataustralianseafood.com.au)

