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Export Guide:
Australia

Market Research Report

KEYWAY TRADE SERVICES

THE AUSTRALIAN FISHING INDUSTRY

SECTOR REPORT

Prepared by Keyway Trade Services

Upon Behalf Of

SEA FISH INDUSTRY AUTHORITY

January 2019

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EXECUTIVE SUMMARY

Summary of the Enquiry

The Sea Fish Industry Authority commissioned an OMIS research report from UKTI in 2012 which was itself an update of an existing Australian seafood report published on the SIA website. KEYWAY UNITED TRADE SERVICES (KUTI) was tasked to update this report on the Australian seafood industry. We were requested to provide the updated information in the same order as it appears in the current report; supplemented with any extra details revealed during the course of research that seemed relevant. The original report was produced by the now defunct Food from Britain, with assistance from market research industry specialists in Australia. We have undertaken to endeavour to update all the information in the original report, but have cautioned that it may be that some data will not be obtainable from sources available to us. There are some instances where updated information is non-existent of unavailable and where we have used the latest available information.

Methodology

Methodology used in compilation of this report involved both desk research; reviewing and utilising existing Australian Government and industry research, statistics and tables from a variety of sources and by conducting personal interviews. We have endeavoured to acknowledge specific source materiel throughout this report and a full list of sources and acknowledgements is provided at the end of this document. Particular acknowledgement is given to The Department of Agriculture and Water Resources, Australian Bureau of Agricultural and Resource Economics and Sciences, Australian Bureau of Statistics and the Reserve Bank of Australia.

Key Principal Findings & Recommendations

Australia currently represents a small and niche export market for British seafood suppliers; and exports to Australia in the years since the last report was compiled have nearly halved. However, the need to develop markets outside the EU and the possibility of a UK/AUS free trade deal may mean that there could be an unprecedented opportunity for UK at a time where Australian demand for seafood threatens to outstrip supply.

The shift away from red meat towards chicken and seafood as a source of healthy nutrition noted in the previous report continues to gain momentum. There are concerns about the sustainability and possible health hazard concerning imported seafood fish sourced from certain SE Asian producers. At a time when the volume of fish caught domestically has been declining and some 70 percent of seafood consumed in Australia is imported, it may be an opportune moment for British producers to investigate Australia as a potential export market.

For any companies interested in exploring specific opportunities the Australian market, Keyway Australia Keyway Trade Services will be pleased to provide some further and specific advice on the prospects for their business.

Section 1: THE AUSTRALIAN TRADE ENVIRONMENT

1.1 General Economy

Australia

Population	24,925,136 (as of 25/12/2018) (Australia population is equivalent to 0.32% of the total world population).
Land Area	7,692,024 sq. km (2,969,907 sq. miles)
Inhabitants per sq km	3
Capital	Canberra ACT
Other main cities	Sydney, Melbourne, Brisbane, Adelaide, Perth
Government type	Constitutional Democracy
Languages	English
Religion	Primarily Christian
Currency	Australian Dollar (AUD)
Exchange Rate (26 Dec 2018)	1 Australian Dollar equals 0.70 United States Dollar 0.55 Sterling
GDP (2018)	GDP in Australia is expected to be 1450.00 USD Billion by the end of 4 QTR 18
Real GDP growth rate (2018)	The Australian economy advanced 0.9% in the June quarter of 2018, above market consensus of a 0.7% expansion
GDP per capita	Australia's GDP Per Capita reached 57,821.511 USD in Jun 2018,
Workforce (2018)	12,694,800 Full-time employment: 8,692,500 Part-time employment: 4,002,300 Unemployed: 684,400
Unemployment rate (June 18)	5.4%
Value of exports of goods and services (2017)	A$373.2 billion

The ten largest trading partners of Australia with their total trade (sum of imports and exports) in billions of Australian dollars and the total trade for all countries for the 2017 calendar year were as follows:

Rank	Country/District	Exports	Imports	Total Trade	Trade Balance
1	China	110.427	64.287	**174.714**	46.17
2	Japan	44.613	23.994	**68.608**	20.619
3	United States	20.758	45.732	**66.490**	-20.758
4	South Korea	22.769	15.996	**38.766**	6.773
5	United Kingdom	12.616	14.846	**27.462**	-2.23
6	New Zealand	14.038	12.772	**26.810**	1.266
7	India	19.214	6.477	**25.690**	12.737
8	Singapore	11.216	13.477	**24.693**	-2.261
9	Thailand	5.119	16.686	**21.805**	-11.567
10	Germany	4.300	16.300	**20.599**	-12.000
Total all countries [2]		373.240	362.244	**735.484**	10.996

The numbers show that of Australia's top 5 trading partners, China and the UK are the only two countries for which two-way trade has increased in each of the last three years.

Despite India's size and proximity to Australia, it only ranks 9th on the list with two-way trade transactions totalling $20.7 billion.

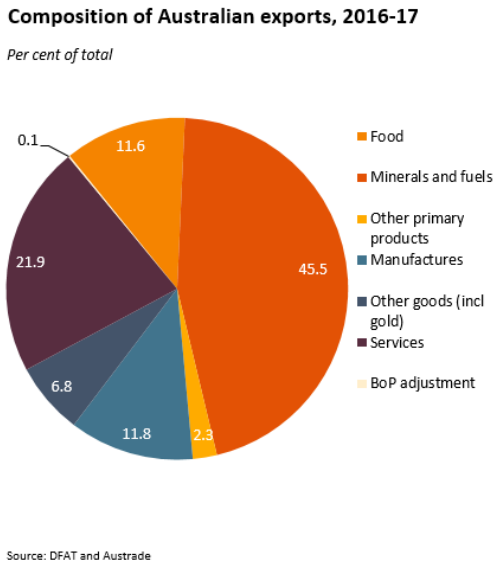
Australia's export mix continues to be dominated by minerals and fuels, with the turnaround in commodity prices helping push their share in total exports up from a recent low of close to 40% in FY2016 to more than 45% in FY2017.

Exports of iron ore were worth almost AU$ 63 billion in 2016-17 and accounted for nearly 17% of total exports of goods and services. They were followed in the ranking of our top exports by exports of coal, which were worth more than AU$ 54 billion and accounted for 14.5% of total export sales.

Third in the export rankings, and the highest earning non-resource export, was education-related travel services, which generated AU$ 28 billion in FY2017, or 7.5% of total export revenues.

Minerals and fuels still dominate export mix

Top 15 exports of goods and services 2016-17			
		A$ bn	Share (%)
1	Iron ores & concentrates	62.8	16.8
2	Coal	54.3	14.5
3	Education-related travel services	28.0	7.5
4	Natural gas	22.3	6.0
5	Personal travel (excl education) services	21.7	5.8
6	Gold	19.0	5.1
7	Aluminium ores & conc (incl alumina)	7.5	2.0
8	Beef, f.c.f.	7.1	1.9
9	Wheat	6.1	1.6
10	Crude petroleum	5.2	1.4
11	Professional services	4.8	1.3
12	Copper ores & concentrates	4.6	1.2
13	Technical & other business services	4.2	1.1
14	Financial services	4.0	1.1
15	Meat (excl beef), f.c.f.	3.8	1.0
	Subtotal	*255.3*	*68.4*
	Total all countries	373.2	100.0
	Education	*28.6*	*7.7*
	Tourism satellite account	*37.2*	*10.0*



Minerals and **fuels** also accounted for the lion's share of the growth in export values last year, increasing by almost AU$ 42 billion.

Just as the composition of Australian exports is dominated by **resources** and **fuels**, the direction of exports is (even more) dominated by East Asia in general and by China in particular. In FY2017, roughly 66% of all Australian exports of goods and services were sold to the region, with almost 30% going to China alone.

Estimated Resident Population
March key figures – Preliminary data

	Population at end Mar quarter 2018 '000	Change over previous year '000	Change over previous year %
New South Wales	7 955.9	113.1	1.4
Victoria	6 430.0	137.4	2.2
Queensland	4 990.7	83.3	1.7
South Australia	1 733.5	11.6	0.7
Western Australia	2 591.9	21.2	0.8
Tasmania	526.7	5.3	1.0
Northern Territory	246.7	0.3	0.1
Australian Capital Territory	419.2	8.5	2.1
Australia *(a)*	**24 899.1**	**380.7**	**1.6**

(a) Includes Other Territories comprising Jervis Bay Territory, Christmas Island, the Cocos (Keeling) Islands and Norfolk Island.

Estimated Resident Population

The preliminary estimated resident population of Australia as at 25 December 2018, was estimated to be 24,925,136.

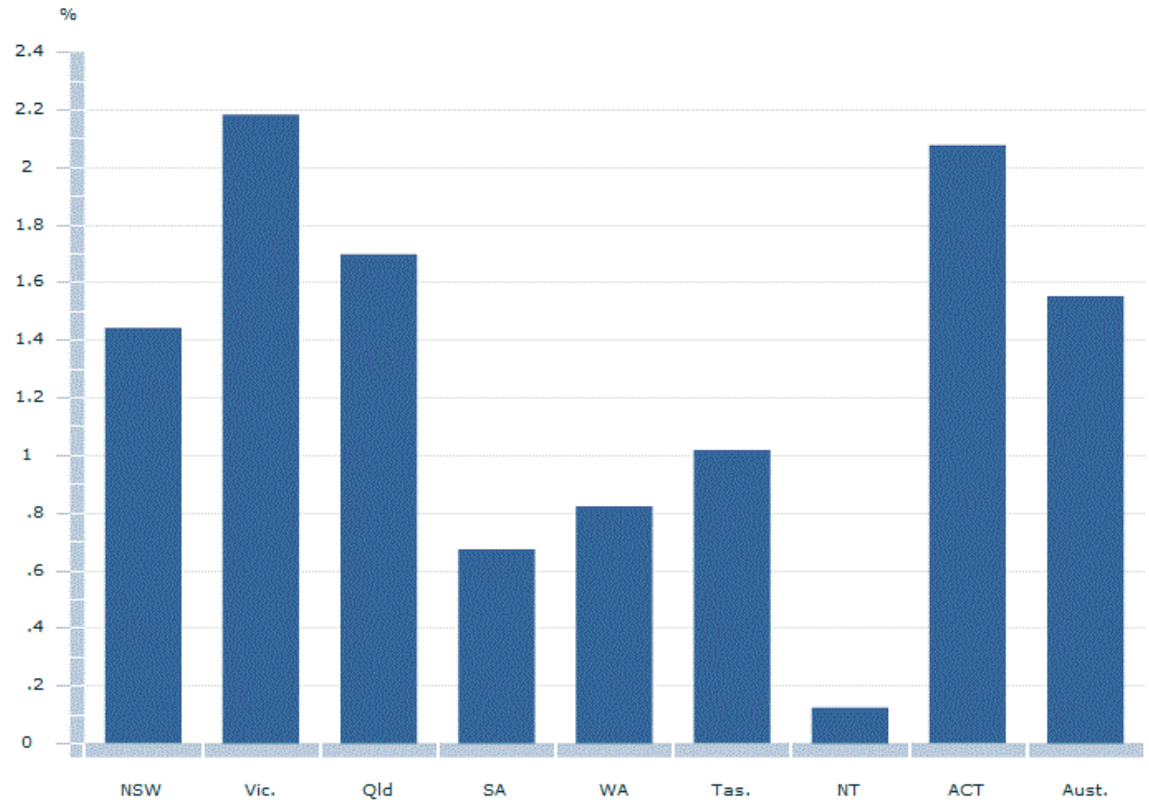
The preliminary estimate of net overseas migration (NOM) for the year ended 31 March 2018 (236,800 people) was 8.8%, or 22,800 people lower than the net overseas migration recorded for the year ended 31 March 2017 (259,600 people).

Population Growth Rates

Australia's population grew by 1.6% during the year ended 31 March 2018. Natural increase and NOM contributed 37.8% and 62.2% respectively to total population growth for the year ended 31 March 2018.

All states and territories recorded positive population growth in the year ended 31 March 2018. Victoria recorded the highest growth rate of all states and territories at 2.2%. The Northern Territory recorded the lowest growth rate at 0.1%.

Population growth rate, Year-ended 31 March 2018



Source: Australian Bureau of Statistics: Australian Demographic Statistics, March quarter 2018

GDP growth in Australia

The forecasts for global and domestic growth are little changed from those presented in the May *Statement on Monetary Policy*. Domestic inflation is still expected to be 2¼% in mid 2020, although inflation in the September quarter of this year is now expected to be lower because of declines in some administered prices.

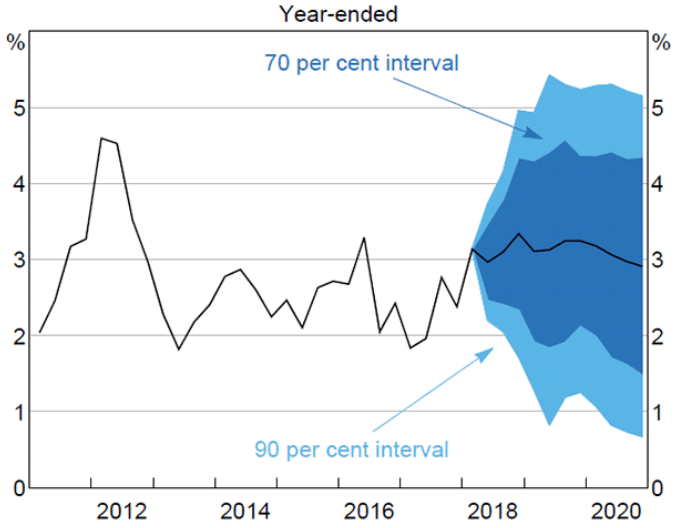
Global economic growth has been solid, and the outlook remains positive. While the risks to global growth from trade protection policies have increased, there are also other important uncertainties. A continuation of solid growth and further absorption of spare capacity – particularly in some major advanced economies – could result in inflation picking up more quickly than is currently expected. This would have implications for monetary policies and financial markets. There also continues to be uncertainty around the outlook for the Chinese economy, as the authorities there look to support growth while managing other objectives, such as financial stability. These risks are discussed below.

Domestic economic growth was a bit stronger than anticipated in the March quarter and is expected to remain above trend over the forecast period. As a result, the unemployment rate is forecast to decline gradually and this is expected to be associated with a further modest increase in wage and inflationary pressures. However, as discussed below, there continues to be uncertainty around the amount of spare capacity in the economy, how quickly it might decline and the consequences for inflation.

GDP growth is expected to remain above trend

GDP growth in Australia is forecast to be a little above 3% over 2018 and 2019. Growth is then expected to ease to around 3% in 2020 when the remaining liquefied natural gas (LNG) projects will have reached their targeted production levels and therefore no longer contribute to export growth.

Population GDP Growth Forecast*



* Confidence intervals reflect RBA forecast errors since 1993

Source: Australian Bureau of Statistics; Reserve Bank of Australia (RBA)

Accommodative monetary policy and tighter labour market conditions are expected to provide ongoing support for growth in household income and consumption throughout the forecast period. Growth in non-mining business investment is expected to remain solid. The implementation of the National Disability Insurance Scheme and public infrastructure investment are expected to continue to boost public demand.

Dwelling investment is expected to remain at high levels over the next year or so, supported by a significant pipeline of work still to be done, and then gradually decline towards the end of the forecast period. The economy is not expected to encounter broad-based capacity constraints for some time, although liaison contacts indicate that capacity constraints are affecting construction activity, particularly in Sydney, and there also continue to be difficulties attracting workers with specialised information technology skills.

The domestic forecasts are conditioned on the technical assumptions that the cash rate evolves broadly in line with market expectations, which is for no change until at least the end of next year. The exchange rate and oil prices are assumed to remain at their current levels. This implies a trade-weighted exchange rate that is around 2.5% higher than was assumed in the May *Statement*, and a US dollar price of Brent crude oil that is around 2% higher. The population aged 15 years and over is assumed to grow by 1.6% per annum over the next few years.

Ongoing solid growth in non-mining investment is anticipated

Non-mining business investment grew by 10% over the year to the March quarter, led by non-residential construction. While leading indicators suggest that growth in construction activity will moderate over the next year, growth in machinery and equipment investment is expected to pick up further over the forecast period, consistent with an ongoing economic expansion.

The overall outlook for mining investment remains little changed: the trough in mining investment is still expected to occur in late 2018 or early 2019. The quarterly profile over the next year has been adjusted slightly to incorporate new information about additional spending associated with the completion of the remaining LNG projects. However, there is still some uncertainty around the timing of these outlays. Further out, mining investment is expected to increase moderately to sustain higher levels of production; recent company announcements have removed some uncertainty around the timing of this activity.

Public demand is expected to provide an ongoing impetus to growth. Liaison contacts continue to report that there are positive spillovers from strong growth in public infrastructure investment. Public demand is likely to be supported by additional revenues associated with the stronger-than-expected terms of trade, although this may be offset to some extent by lower stamp duty revenues associated with easing housing market conditions in some states.

Current rate of consumption growth is expected to continue

The forecasts for consumption growth are little changed. Consumption growth has been a bit more volatile from quarter to quarter over the past year, but has been stable in year-ended terms and is expected to continue at a similar rate. The March quarter outcome was lower than had been expected at the time of the May Statement, although the weakness was concentrated in expenditure on recreational services and hotels, cafes and restaurants and does not appear to have significant implications for the outlook; growth in consumption of goods remained strong in the quarter. The outlook for household consumption growth continues to represent a significant uncertainty for the forecasts, in large part due to uncertainty around household income growth (see below).

Household disposable income growth will be supported over the forecast period by the reductions in income taxes announced in the 2018/19 federal budget. Consumption is projected to grow at the same rate as household disposable income over the forecast period.

Exports are expected to continue growing, but with some change in composition

Exports are expected to grow strongly, led by LNG exports as production ramps up. Iron ore exports are expected to increase only slightly, supported by productivity improvements, and coal exports are expected to increase marginally. Non-ferrous metal exports are also likely to contribute to export volume growth. However, by 2020, most of Australia's major resource projects are expected to be producing at their targeted production levels. At this time, resource export volumes will be at historically high levels but will contribute little to GDP growth. Exports of services and manufactures are expected to grow steadily, supported by solid trading partner growth. Beyond the June quarter, rural exports are expected to be a little weaker than anticipated in the May *Statement* because of drought conditions in parts of the country. If these conditions were to persist or become more widespread, then the impact on rural exports, and the farm sector more generally, would be larger.

The outlook for consumption remains uncertain

Uncertainty about the outlook for wages growth has a direct bearing on the forecasts for household income growth and therefore consumption. The changes to income tax announced in the 2018/19 federal budget should support growth in household disposable income over the forecast period. Lower administered prices may also support real income growth in the near term, given that administered items make up around one-fifth of household consumption. Other uncertainties that affect the outlook for inflation, such as the level of retail competition, also have implications for real disposable income.

The high level of household debt also remains a key consideration for household consumption. For example, a highly indebted household facing weaker growth in disposable income or wealth than they had expected may respond by reducing consumption. Consumption growth may also be lower for a time if households concerned about their debt levels choose to pay down debt more quickly rather than consume out of additional income. Steps taken by regulators to strengthen household balance sheets have led to a moderation in growth in the riskier types of lending to households, but risks remain. While demand factors are likely to have been the dominant influence affecting credit growth of late, the ongoing high level of public scrutiny of lending decisions could see some further tightening in the supply of credit, although there are no signs of this as yet.

Recent declines in national housing prices have been gradual and follow several years of very strong growth. Accordingly, there is no evidence that moderate housing price declines have weighed on household consumption to date. Nevertheless, housing assets account for around 55% of total household assets, so lower housing prices could lead to lower consumption growth than is currently forecast. Although the earlier gains in national housing wealth may not have encouraged much additional consumption, it is possible that the consumption decisions of highly indebted and/or credit-constrained households could be more sensitive to declines in housing prices than to the previous increases.

Trade protectionism risks

An increase in protectionist measures could materially weaken the investment outlook and may weigh on confidence and financial market conditions more generally. Quantifying these possible effects is difficult at this point.

Free trade between UK and Australia

Any Brexit deal with the European Union would be likely to keep Britain in a customs union with the EU after Brexit day, on March 29, until the two sides hammer out a longer-term free-trade agreement (FTA) – which is at the very least a 21-month process, likely longer. This will leave Australia waiting longer for a free-trade agreement with Britain and potentially with less to gain from it.

During that time Britain will need to remain aligned with EU tariffs, quotas and regulatory standards. This means that while Britain can talk to other countries about FTAs, it can't sign them. It is not within the scope of this report to speculate about the actual outcome of Britain's exodus form the EU and what form the final exit agreement will take when finding a path to arrive at an agreed outcome seems beyond the wit of all concerned.

Climate Change

If global development continues without effective mitigation of greenhouse gases, the impacts on Australia will be severe. In the absence of adaptation actions and in light of the uncertainty around future rainfall projections, it is estimated that by mid-century reduced stream flows and quality of water supply across southern Australia means irrigated agriculture in the Murray Darling Basin will have fallen by half. By the end of the century, it is likely to have ended, and the area will be depopulating.

Climate change is likely to have significant impacts on agriculture in Australia (though there are differences in vulnerability depending on region and products).

Global bank HSBC has warned Australia is one of the countries most vulnerable to climate change in the developed world, and the threat of Australians dying from global warming-related events has risen. A new report by the bank, titled *Fragile Planet*, has ranked 67 countries for their exposure to climate change risks. Australia scored poorly, with the largest percentage rise in deaths attributable to climate change in the developed world.

Australia was ranked as highly sensitive to the physical risks of climate change, with predictions of more storms, floods, rain and bushfires. Principal Advisor at The Australia Institute, Mark Ogge, said Australia's industries and infrastructure, such as coastal based business, roads and rail, and both commercial residential assets, are at significant risk from climate change-related events. The Australia Institute believes billions of dollars in infrastructure are at risk from a one-metre sea level rise.

However, any meaningful attempt to accept climate change is real and that decisive and effective action must be taken is being road-blocked by a group of climate-change deniers within the ruling Federal Liberal party. Former Prime Minister Malcolm Turnbull has declared the Liberal Party is not capable of dealing with climate change because of an influential group within its ranks that believes the phenomenon is a "fraud" and carbon dioxide is just plant food with "the more you have the better".

In a scathing assessment of the government he formerly led as prime minister, Mr Turnbull said the Liberals and the -Coalition as a whole were not capable of achieving a genuine consensus on the issue of climate change. Last September, Liberal National Party senator Ian Macdonald told the federal parliament that Australia's children have been "brainwashed" about human-induced climate change, which he described as "a fad or a farce or a hoax" and "farcical and fanciful".

Macdonald's fellow LNP MP George Christensen attended the Heartland Institute's climate sceptic conference. There he described climate concerns as "hysteria" and the stuff of science fiction.

Australia is one of the few countries that has seen levels of fossil fuel exports growing as a percentage of their gross domestic product.

Section 2: THE AUSTRALIAN SEAFOOD INDUSTRY

2.1 Overview

Australia has an international reputation as a producer of safe, sustainable and high-quality seafood products. Most of the value of Australian aquaculture production comes from high value species such as pearls, salmonids, tuna and oysters but there are over forty species commercially produced in Australia.
The top five groups, in order of production value, are: **salmonids**, **tuna**, **edible oysters**, **pearl oysters** and **prawns**.

Other aquatic species grown in Australia include: **abalone**, **freshwater finfish** (such as barramundi, Murray cod, silver perch), **brackish water** or **marine finfish** (such as barramundi, snapper, yellowtail kingfish, mulloway, groupers), **mussels**, **ornamental fish**, **marine sponges**, **mud crab** and **sea cucumber**.

Australia's fishing zone is the world's third largest (total of 8,148,250km²), but Australian waters lack nutrients and, consequently, have relatively low productivity. Australia's Exclusive Economic Zone contains some 3,700 known species of fish, over 2,800 species of mollusc and over 2,300 species of crustaceans, but only a small proportion of these are commercially fished. Commonwealth fisheries generate over $300 million in value alone and annually produce about 52,000 tonnes of catch.

The value of the mercantile fishery and aquaculture industry reached $3.06 billion in 2016–17 and in real terms was 9% higher than a decade previously (2006–2007). This growth is largely due to aquaculture. The volume of fishery and aquaculture production has increased by 4% between 2006–07 and 2016–17.

The volume of aquaculture products grew by 53% during this period, changing the pattern of production significantly, shifting from the production of wild-catch stocks toward production of aquaculture products. The development of Australia's aquaculture sector has resulted in an increased share of total value and volume. Farmed salmonids drove most of this growth, rising by 106%.
The Food and Agriculture Organization of the United Nations (FAO) has predicted by 2021 more than half of the fish consumed globally will be produced by aquaculture.

The Global Export Market

Apparent global per person seafood consumption between 1961 and 2017 has increased by 100% (whole weight equivalent) and meeting this increase has provoked a corresponding rise in production by global fisheries.
Although a large proportion of the increase has emanated from an increase in aquaculture, (reflecting relatively static quantities of wild-catch), the fact remains that in 2016, 91 million tonnes out of a total global fisheries production of 171 million tonnes came from the oceans.

Trades in fish and related products have progressively become a global market over recent decades. This global trade has risen from 11% in 1976 to 27% in 2016 and accounts for 35% of all fish traded in that year.

From this perspective Australia's fishery and aquaculture industry is a minor global player, producing around 0.15% of global fishery and aquaculture supply by volume and less than 1% of world trade by value. The value of Australia's fishery and aquaculture product exports was $1.44 billion. in FY 2016/7.

Australia's export markets

World export market is becoming increasingly attractive to Australian producers of high-value seafood. The increasing demand for indigenous seafood and proximity to Asian markets, combined with a reputation as a supplier of sustainable, high-quality seafood, means this industry should be competitively positioned to take advantage of the overseas demand for high-value products. In her introduction to *ABARES Australian Fisheries and Aquaculture Statistics 2016 Report*, Assistant Minister for Agriculture and Water Resources Anne Ruston has noted "The fisheries and aquaculture industries have a reputation as a supplier of sustainable, high-quality seafood and sensible government policies". Sustainable seafood production in Australia is on the rise but fish stocks around the world are in crisis. Figures released by the Australia Bureau of Agriculture and Resource Economics put the value of Australia's seafood production for 2017 at $3 billion, up 9% on last year. Australia has a good sustainability record, and Asia remains a major export destination for both Australian wild and farmed products. However, the pattern of Australian fish exports has shifted towards the south-eastern regions of China and Vietnam. The major export is now rock lobster, although other high-value species such as salmon, abalone and blue-fin tuna are being exported to markets in Japan, Hong Kong, China and Vietnam making these varieties expensive and sometimes unobtainable for the Australian domestic consumer.

Australia's main export markets for fishery and aquaculture products (edible and non-edible) in value terms are shown below. These markets, combined, account for 87% of total export value. China receives much of its seafood indirectly from re-exports via Hong Kong and Vietnam.

Vietnam	**$575 million**
Hong Kong	**$232 million**
Japan	**$223 million**
China	**$171 million**
United States	**$53 million**

Source: ABARES Australian fisheries and aquaculture statistics 2018 report

Japan was the major export destination for Australian fishery and aquaculture product in the decade prior to the turn of the century but has become less significant since then and has fallen by some 3% in quantity and 7% in value terms in the decade between 2007 and 2017. This decline is attributed to a rising dollar/yen exchange rate in the AUD's favour, a decline in per capita fish consumption in Japan and a rise in SE Asian crustacean production which has displaced some exports of Australian prawns to Japan. These factors, combined with a growth in the Chinese, Hong Kong and Vietnamese middle classes have seen an attempted redirection of Australian seafood trade.

Between 2006–07 and 2016–17 rock lobster has made up an increasing share of Australian fisheries product export value, rising from 31% in 2006–07 to 47% in 2016–17. During this period the value of rock lobster exports increased from $587 million (in 2016–17 dollars) to $676 million.

Australia's competitiveness in the fishery and aquaculture export market is influenced by changes in input costs exchange rates of Australia's trading partners and competitors and factors such as trade agreements between Australia and its trading partners and the macroeconomic factors of competing exporting countries.

Source: (FAO) Food and Agriculture Organization of the United Nations

Imports

Exports notwithstanding, nearly 70% of seafood sold in Australia is imported, and the sustainability of that product is often dubious. Australian product competes with imports from the burgeoning aquaculture industries in South-East Asia, particularly prawns from Thailand, Vietnam and China, and finfish from Vietnam. Volatile exchange rates can significantly affect the affordability of domestically produced product compared to these imports.

Australia's apparent consumption of seafood increased, on average, at an annual rate of 0.8% between 2006–07 and 2016–17, increasing 9% overall in this period. Because of accelerated growth in population, per capita consumption of seafood declined over the same period, from 15 kilograms per person in 2006–07 to 13.9 kilograms in 2016–17. Between 2013–14 and 2016–17 the volume of imported seafood fell by 5%, reflecting, for the most part, a drop in frozen prawns and frozen, prepared or otherwise treated fish. A significant increase in domestic supply during 2016–17 resulted in imports accounting for 66% of Australia's total apparent consumption of seafood that year.

Australia's consumption of seafood

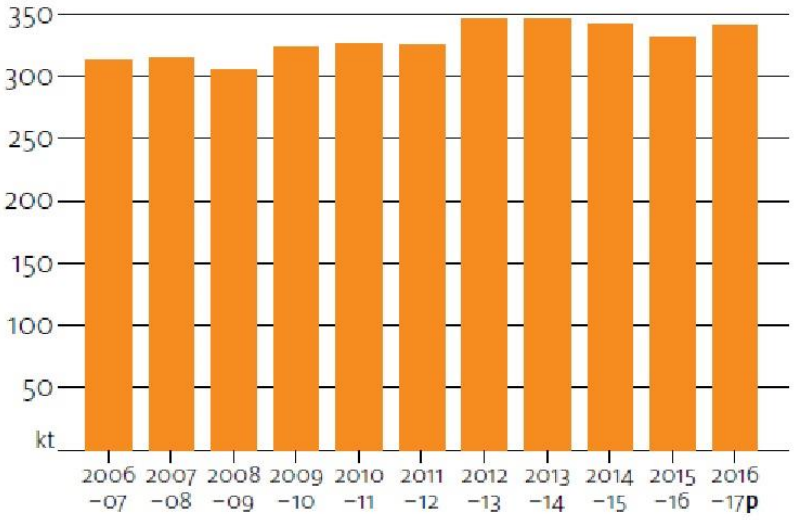
The average annual increase in Australian consumption of seafood was 1.3% in the decade between 2006–07 and 2016–17 and rose from some 313,450 tonnes to a little over 357,600 tonnes.

Between 2006/07 and 2013/14 the volume of imported sea-foods increased by 20% from 198,424 tonnes in 2006–07 to a peak of 237,511 tonnes in 2013–14.
This was followed by a 5% decline in volume up to Y 2016–17. reflecting a decline in supply of frozen prawns and other prepared fish. A significant increase in domestic supply during 2016–17 resulted in imports falling to 63% of total apparent consumption which represented the lowest proportion since 2007–08.
The increase in domestic consumption of seafood in 2016–17 was attributable to both an increase in production and a decrease in exports that year.

Apparent consumption of seafood in Australia, 2006-07 to 2016-17

p Preliminary estimate

Source: ABARES Australian fisheries and aquaculture statistics 2018 report



In Australia, per capita seafood consumption now sits at 14.5 kilograms in 2016–17. **Consumption of seafood ranks behind chicken, beef, veal and pork, but is still above lamb**.

2.2 The Industry in Profile (Overview)

The Australian Industry – Commercial Fisheries

Gross Value of Production (GVP)

The total income produced from the commercial yield as a measure of the value of fishery production generated by commercial fishers or produced by aquaculture farmers across Australia's states and territories is assessed by an index known as gross value of production (GVP). This is a means of providing interested parties with statistical information, in terms of value, of quantity of commercial harvests and relative value across ranges of species.

This yardstick to quantify value of Australian fisheries in official statistical terms started in the early 1900s and in the late 1980s the Australian Bureau of Statistics (ABS) began publishing GVP statistics for Australian fisheries, by jurisdiction and at a national level. The ABS no longer collects these statistics. They are now collated by the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) which presents statistics on the value of production of fishery and aquaculture products from information on international trade in fishery and aquaculture products drawn from ABS data.

Information to feed these statistics is obtained from sources including fishers and fish farm operators, markets and buyers and processors. Because much fish is sold on a market distant from the point of landing or production, transport and marketing margins are usually subtracted to derive a 'beach price' that commercial fishers and aqua-farmers actually receive allowing comparisons across regions and species. Conversion factors are also applied for species where production is not landed whole but in a semi-processed state, such as headed and gutted.

Overall Australian commercial fisheries and aquaculture production increased 1% to AU$ 3.06 billion in 2016/7. This growth was largely attributable to growth in aquaculture production.

Wild-caught fisheries

Wild-caught fisheries production value fell slightly by 0.4% to AU$ 1.7 billion. This was due to of lower rock lobster and finfish production value.

Aquaculture

Australian aquaculture production value rose to 4% to AU$ 1.3 billion, which reflected higher salmonid and edible oyster production value.

Salmonids

Gross production value rose 5% to AU$ 756 million.
Salmonids accounted for around a quarter of fisheries and aquaculture.

Rock lobster

Rock lobster production fell 3% to AU$ 673 million, despite an increase in production volume, because of weaker prices.

Biological status of fish stocks in 2017, by fishery or sector

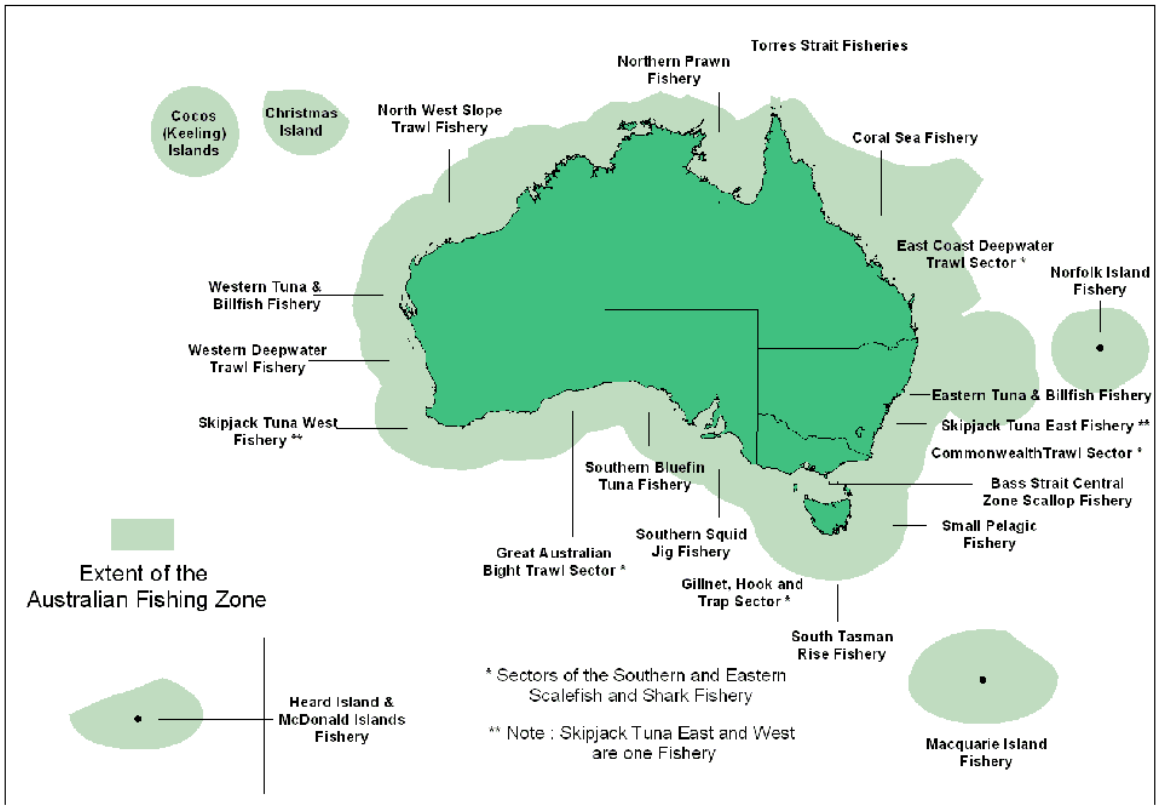
Source: DAFF Fishery Status Reports 2018

The Australian Fishing Zone

Australia's territorial sea extends from the coast out to 12 nautical miles. Within the territorial sea, Australia has full sovereignty – including with respect to fisheries – subject only to the rights of foreign ships to 'innocent passage' through the territorial sea. Consistent with international law, Australia has also claimed sovereign rights to explore and exploit the natural resources of the continental shelf (including sedentary species) where the shelf extends beyond 200 nautical miles.

As a matter of Australian domestic law, the Offshore Constitutional Settlement provides for the Australian states and the Northern Territory to manage fisheries out to 3 nautical miles from the coast, and for the Australian Government to manage fisheries from three to 200 nautical miles. However, these default arrangements are frequently varied through instruments known as offshore constitutional settlement arrangements.

The Australian Fishing Zone



Source: Department of Agriculture & Water Resources: Agriculture.gov.au

Production – Major commercial fisheries

Gross value of fisheries and aquaculture production, Australia

	2014-15 $'000	2015-16 $'000	2016-17 p $'000
State wild-catch fisheries			
New South Wales	89,484	91,082	89,305
Victoria	58,742	57,810	54,362
Queensland	182,209	175,897	192,909
South Australia	240,204	264,653	253,107
Western Australia	488,420	504,068	529,543
Tasmania	175,265	182,349	175,935
Northern Territory	31,071	34,894	43,860
Total	1,265,394	1,310,754	1,339,021
Aquaculture a			
New South Wales	55,756	60,232	64,610
Victoria	29,054	27,584	39,320
Queensland	114,058	117,300	116,500
South Australia	227,480	251,520	230,540
Western Australia	81,186	89,199	90,453
Tasmania	650,343	730,723	770,949
Northern Territory	24,100	24,522	34,447
Total	1,181,977	1,301,080	1,346,819
Commonwealth fisheries			
Northern Prawn	106,827	124,014	118,812
Torres Strait	25,109	24,355	18,045
SESSF Commonwealth Trawl Sector	38,357	42,913	47,096
SESSF Gillnet, Hook and Trap Sector	20,915	22,378	25,286
SESSF Great Australian Bight Trawl Sector	8,474	7,694	10,040
Eastern Tuna and Billfish – Longline and minor line	34,975	48,755	35,674
Southern Bluefin Tuna	36,807	35,875	38,544
Western Tuna and Billfish	np	np	np
Bass Strait Scallop	2,761	4,610	5,998
Southern Squid Jig	890	1,035	572
Other fisheries b	75,160	127,201	103,283
Total	350,276	438,829	403,350
Total value c	2,764,206	3,020,093	3,057,790

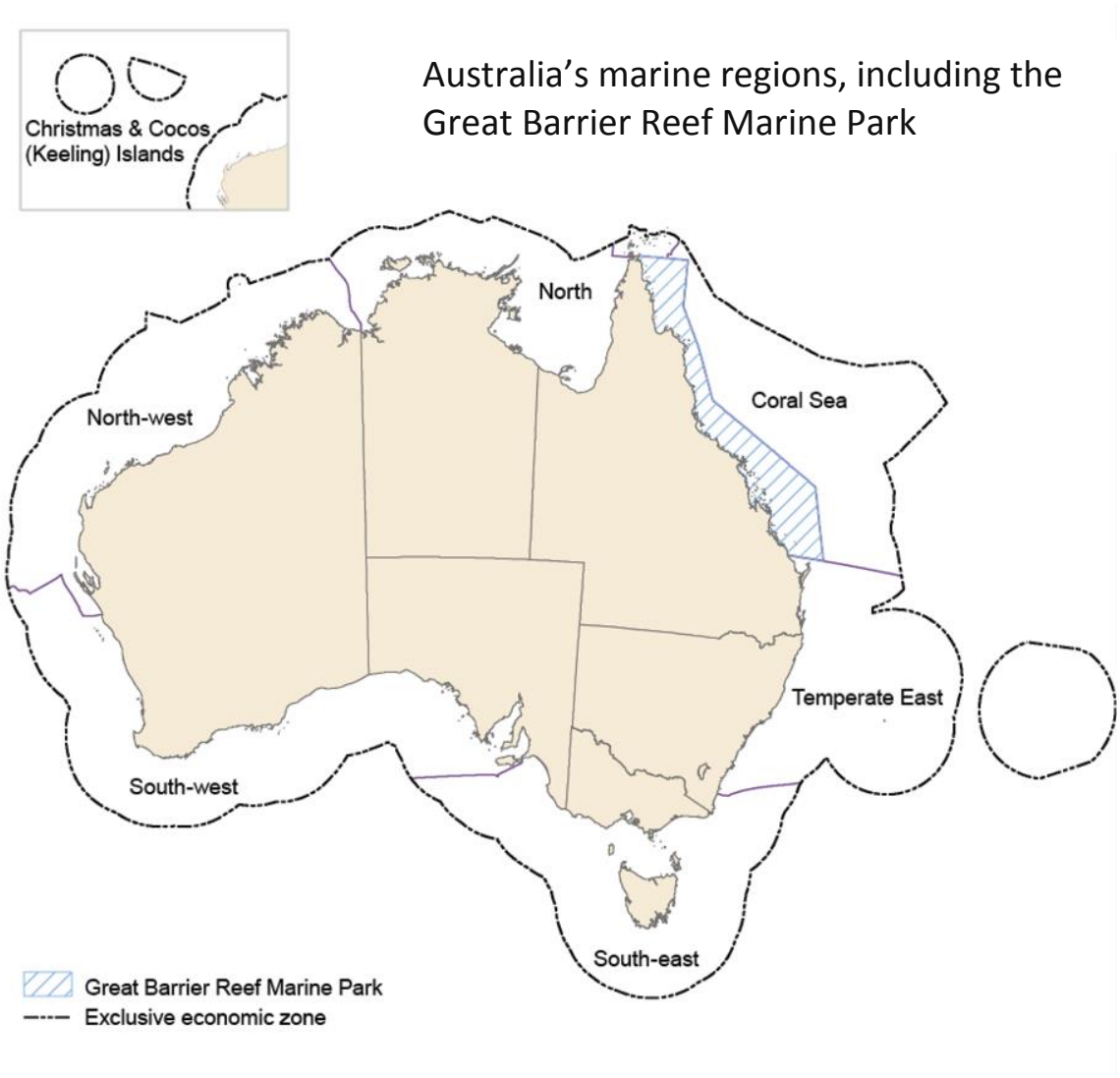
a Excludes the value of hatchery fishery production. b Includes entries marked np and Small Pelagics, Macquarie Island, Coral Sea, Heard and McDonald Islands, SESSF Victorian coastal waters sector, Norfolk Island, South Tasman Rise, Eastern and Western Skipjack Tuna, East Coast Deepwater Trawl, North West Slope Trawl, and Western Deepwater Trawl fisheries because of confidentiality requirements. c To avoid double counting, total value has been reduced to allow for southern bluefin tuna caught in the Commonwealth Southern Bluefin Tuna Fishery, as an input to farms in South Australia. na Not available. np Not for publication because of confidentiality requirements. Included in Other fisheries. p Preliminary. SESSF Southern and Eastern Scalefish and Shark Fishery.

Sources: ABARES; Australian Fisheries Management Authority; Western Australian Department of Fisheries; Tasmanian Department of Primary Industries and Regional Development; New South Wales Department of Primary Industries; Queensland Department of Agriculture and Fisheries; Victorian Fisheries Authority; Northern Territory Department of Primary Industry and Resources; Primary Industries and Regions South Australia; South Australian Research and Development Institute.

Marine regions

Six discrete marine regions have been identified under marine bioregional planning: **North, Coral Sea, Temperate East, South-east, South-west and North-west**.

Marine bioregional plans have been developed for 4 of the regions (North, Temperate East, South-west and North-west), and a marine regional profile has been developed for the South-east Marine Region. The plans and profile aim to improve decision-making and to protect marine biodiversity and heritage values, while supporting the sustainable use of ocean resources by marine-based industries. Designation of the 6 marine regions was informed by the provincial bioregions identified as part of the Integrated Marine and Coastal Regionalisation of Australia (IMCRA 4.0). The marine regions form the framework for the Commonwealth Marine Reserve Network.



Source: Australian Department of the Environment and Energy, Environmental Resource Information Network

North Marine Region

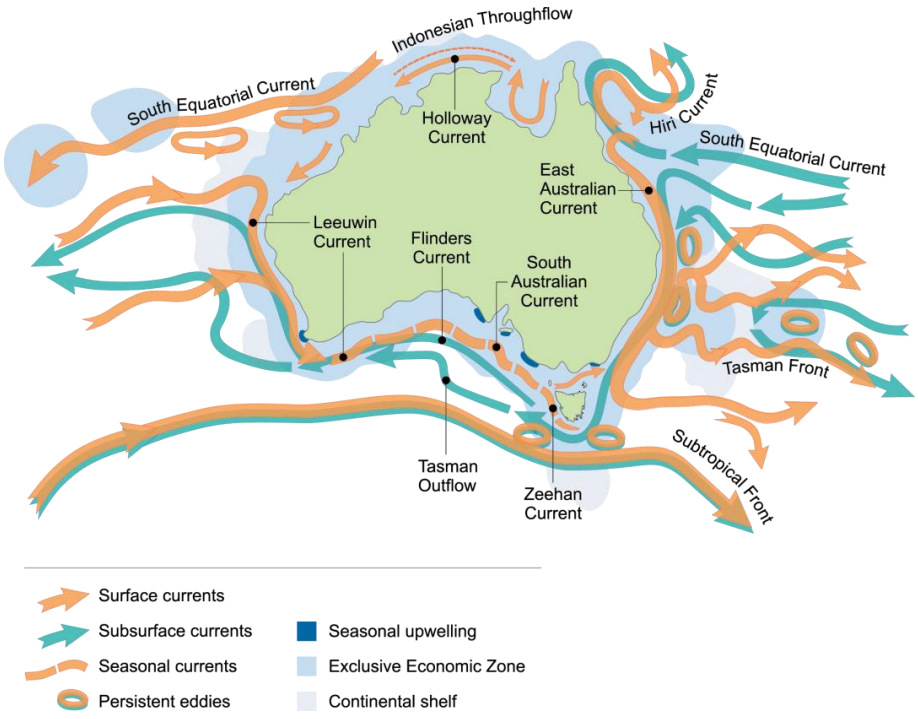
The North Marine Region covers Australian waters from west of Cape York Peninsula to the Northern Territory - Western Australia border. The shelf west of Cape York Peninsula is overlain by mostly shallow, tropical waters of less than 70 metres depth, modified by complex tidal regimes and high cyclonic activity.

The North Marine Region borders the Coral Triangle, a marine biodiversity hot spot, which is known for its high biodiversity of tropical species, although endemism (species unique to the area and found nowhere else) is relatively low. One of the reasons for this low endemism is that there are no physical barriers to species dispersal, thereby facilitating species exchange with neighbouring regions.

The North Marine Region supports several industries, including commercial fisheries managed by the Australian and Northern Territory governments, oil and gas exploration and production, commercial and recreational vessel activity, recreational fishing, Indigenous activities, and defence operations.

Coral Sea Marine Region

The Coral Sea Marine Region covers Australian waters east of Cape York Peninsula, south to 24˚29′S. It is adjacent to, but does not include, the Great Barrier Reef Marine Park. The Coral Sea Marine Region and the Temperate East Marine Region previously comprised the East Marine Region. The Coral Sea Marine Region encompasses tropical to subtropical environments, and incorporates atoll reefs, reef complexes, coral cays, offshore islands, terraces, deep water valleys and troughs, offshore plateaus, abyssal plains, and seamounts.



A map of Australia's surrounding waters, indicating the directions, locations and relative sizes of the major ocean currents influencing Australia's marine environment. Surface currents are indicated by grey arrows, and surround the whole country; subsurface currents are indicated by blue arrows. Seasonal currents are indicated with a dashed grey line and are off the south coast from the bottom of Western Australia to the bottom of Tasmania. Persistent eddies are indicated by circles, located to the south-west, south and east.

Source: CSIRO National Environmental Science Program, Marine Biodiversity Hub

Waters within the Coral Sea are influenced by the Western Pacific Warm Pool water mass. The warm pool is a water mass with a monsoonal and trade wind influence, and high interannual variability associated with the El Niño–Southern Oscillation (ENSO) Although Coral Sea waters are considered nutrient poor at the surface, a deep chlorophyll maximum layer has been observed, with chlorophyll levels (and primary production) peaking from June to August.

Several protected and migratory species use the marine region for breeding and/or feeding, including marine turtles, sea snakes and marine mammals. The marine region supports transient populations of highly mobile and migratory pelagic species (notably pelagic predators such as billfish, tuna and sharks).

The marine region supports several industries, including commercial fisheries managed by the Australian Government, offshore tourism, commercial and recreational vessel activity, recreational fishing, Indigenous activities, and defence operations.

Temperate East Marine Region

The Temperate East Marine Region covers Australian waters from the southern boundary of the Great Barrier Reef Marine Park to Bermagui in southern New South Wales. It also includes the waters surrounding Lord Howe and Norfolk islands.

The marine region encompasses subtropical and temperate environments, and incorporates the southernmost coral reefs, Surface waters are generally of low to moderate productivity, and nutrient availability is strongly regulated by vertical mixing of the water column. Tropical species prevail in the north and are gradually replaced by temperate species in the south. Primary production is generally higher in the southernmost waters of the marine.

The marine region supports several industries, including commercial fisheries managed by the Australian, Queensland and New South Wales governments; commercial and recreational vessel activity; recreational fishing; Indigenous activities; and defence operations.

South-east Marine Region

The South-east Marine Region covers Australian waters from the southern boundary of the Temperate East Marine Region, around Tasmania and west to Kangaroo Island in South Australia. It also includes the waters surrounding Macquarie Island.

The marine region includes a wide range of temperate habitats, including the vast shallow expanse of Bass Strait, shelf rocky reefs, continental margin canyons, groups of seamounts and abyssal plains. The continental shelf is relatively narrow throughout most of the marine region. Overall, the South-east Marine Region is relatively low in nutrients and primary productivity and/or feeding, including marine mammals, seabirds, tunas and sharks.

The marine region supports several industries, including commercial fisheries managed by the Australian, New South Wales, Victorian, Tasmanian and South Australian governments; oil and gas exploration and production; small-scale renewable energy; commercial and recreational vessel activity; recreational fishing; Indigenous activities; and defence operations.

South-west Marine Region

The South-west Marine Region comprises Australian waters from the eastern end of Kangaroo Island, South Australia, to Shark Bay, Western Australia.

The marine region includes both temperate and subtropical habitats. It incorporates the wide continental shelf of the Great Australian Bight; significant canyon features such as the Perth Canyon, the Albany canyon group and canyons near Kangaroo Island; subtropical and temperate islands and reefs; fracture zones; deepwater plateaus; and abyssal plains.

The low-nutrient environment of the South-west Marine Region results in clear waters and high levels of light penetration, giving rise to a continental shelf characterised by high diversity of algal species and benthic communities. These, in turn, provide habitats for a large variety of species, contributing to high species diversity and endemism in the region. Several protected and migratory species use the region.

The marine region supports several industries, including commercial fisheries managed by the Australian, South Australian and Western Australian governments; oil and gas exploration and production; small-scale renewable energy; commercial and recreational vessel activity; recreational fishing; Indigenous activities; and defence operations.

North-west Marine Region

The North-west Marine Region includes Australian marine waters from Kalbarri, south of Shark Bay, to the Western Australia – Northern Territory border. The marine region includes subtropical and tropical habitats, with extensive areas of continental shelf and slope, plateaus, terraces, coralline algal reefs, pinnacles, shoals, offshore reefs, canyons and abyssal plains.

The marine region's range of geomorphic features and habitats is reflected in high species diversity, which is predominantly tropical and typical of the Indo-Pacific area. Several protected and migratory species use the marine region for breeding and/or feeding, including marine mammals, marine turtles, seabirds, tunas and sharks.

The marine region supports several industries, including commercial fisheries, shipping, oil and gas exploration and production, commercial and recreational vessel activity, recreational fishing, Indigenous activities, and defence operations.

Profiles of Australian fisheries, 2015–16 to 2016–17.

Australian fisheries are spread around the continental landmass of Australia, covering a range of harvesting methods for a range of species.
The following profiles contain data from the 2015-16 and 2016-17 financial years.

Commonwealth fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Northern Prawn	Banana prawn, tiger prawn, Endeavour prawn and king prawn	Otter trawl	53 vessels	55 vessels
Torres Strait *a*	Prawns, tropical rock lobster, Spanish mackerel, pearl shell, trochus, finfish, sea cucumber, crab	Otter trawl, troll, handline, free dive, hookah	532 endorsements 281 endorsements 123 endorsements 117 endorsements 143 endorsements 78 endorsements 117 endorsements 245 endorsements	519 endorsements 266 endorsements 119 endorsements 84 endorsements 150 endorsements 80 endorsements 123 endorsements 248 endorsements
SESSF Commonwealth Trawl Sector	Mixed fish species, particularly pink ling, blue grenadier, flathead, silver warehou	Otter trawl, Danish seine	51 vessels	48 vessels
SESSF Gillnet, Hook and Trap Sector	Mixed fish species particularly pink ling, blue-eye trevalla, gummy shark	Demersal gillnet, demersal longline, dropline, trotline, trap, purse seine	65 vessels	71 vessels

Commonwealth fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
SESSF Great Australian Bight Trawl Sector	Deepwater flathead, Bight redfish	Demersal otter, limited midwater trawl	4 vessels	5 vessels
Southern Bluefin Tuna	Southern bluefin tuna	Purse seine, pole and line, longline, trolling	(6 farm boats and 25 domestic)	(5 farm boats and 26 domestic)
Eastern Tuna and Billfish	Yellowfin tuna, bigeye tuna, skipjack tuna, albacore, billfish	Pelagic longline, purse seine, pole, trolling, rod and reel, handline	44 vessels	46 vessels
Western Tuna and Billfish	Yellowfin tuna, bigeye tuna, skipjack tuna, albacore, billfish	Pole and line, purse seine, pelagic longline, troll, rod and reel, handline	3 vessels 2 longliners 1 minorline	3 vessels
Bass Strait Scallop	Scallop	Dredge	11 vessels	12 vessels
Small Pelagic *b*	Blue mackerel, jack mackerel, redbait, Australian sardine	Purse seine, midwater trawl	3 vessels	3 vessels
Southern Squid Jig	Gould's squid	Jig	7 vessels	6 vessels
Sub Antarctic	Patagonian toothfish, mackerel icefish Patagonian toothfish	Trawl (demersal and midwater), longline, trial pot fishing Demersal trawl	7 vessels	5 vessels
Western Deepwater Trawl	Mixed fish species	Otter trawl	11 permits, no fishing	11 permits, 1 vessels
North West Slope Trawl	Scampi	Otter trawl	7 permits 2 fishing	7 permits 2 vessels
Coral Sea	Reef fish including shark, trochus, tropical rock lobster, sea cucumber, aquarium fish, live rock	Demersal line, trawl and fish trap, hand collection with and without breathing apparatus, hand-held scoop, seine nets	16 permits 3 vessels	16 permits 6 vessels

Commonwealth fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
South Tasman Rise	Orange roughy, smooth oreodory, spikey oreodory	Deepwater demersal trawl	closed	closed

a Numbers of active transferable vessel holder and traditional inhabitant licences in Torres Strait with commercial fishing endorsements.
b Includes four permits held in the Informally Managed Fishery. SESSF Southern and Eastern Scalefish and Shark Fishery. SFR Statutory fishing right.

Source: Australian Fisheries Management Authority

New South Wales fisheries profiles, 2015–16 to 2016–17

Fishery		Species	Method	Number (2015–16)	Number (2016–17)
Abalone		Blacklip abalone (only)	Diving	50 shareholdings	50 shareholdings
Rock Lobster		Eastern rock lobster	Trapping	98 shareholdings	100 shareholdings
Ocean Trawl		Prawns, flathead and school whiting	Otter board trawling	201 shareholdings	181 shareholdings
Ocean Trap and Line		Snapper, leatherjacket, bonito and spanner crab	Fish and spanner crab traps, handline and dropline	346 shareholdings	327 shareholdings
Ocean Hauling		Mullet, Australian sardine and Eastern Australian salmon	Hauling (seine) nets and purse seine net	263 shareholdings	232 shareholdings
Southern Fish Trawl		Flathead, school whiting	Otter board trawling	23 shareholdings	19 shareholdings
Estuary Prawn Trawl		School prawn, squid andking prawn king prawn	Otter board trawling	154 shareholdings	134 shareholdings
Estuary General		Mullet, bream, prawn and crab	Mesh and hauling (seine) nets, crab and fish traps and hand gathering	588 shareholdings	533 shareholdings
Inland		Yabby and European carp (only)	Yabby traps and gillnets	28 shareholdings	28 shareholdings
Sea Urchin and Turban Shell		Sea urchin and periwinkle	Diving	37 shareholdings	37 shareholdings
Aquaculture *a*	Prawns	Pond culture	10 licence holders	10 licence holders	
	Yabby	Ponds and farm dams	67 licence holders	63 licence holders	
	Oyster	Rack tray and stick	297 licence holders	284 licence holders	
	Silver perch	Pond	76 licence holders	71 licence holders	

New South Wales fisheries profiles, 2015–16 to 2016–17

Fishery		Species	Method	Number (2015–16)	Number (2016–17)
	Trout	Ponds and raceway	23 licence holders	21 licence holders	
	Snapper	*na*	9 licence holders	9 licence holders	
	Barramundi	Pond culture	10 licence holders	8 licence holders	

a Aquaculture licence holders may culture more than one species per licence.
na Not applicable.

Note: All New South Wales shares/entitlements are held in fishing businesses that may have shares and/or entitlements in one or more fisheries.
The Abalone, Rock Lobster, Ocean Trawl (Prawn and Northern Fish Trawl), Ocean Trap and Line, Ocean Hauling, Estuary General and Estuary Prawn Trawl Fisheries are share management fisheries.
The Sea Urchin and Turban Shell, Southern Fish Trawl and Inland Fisheries are restricted fisheries.

Source: New South Wales Department of Primary Industries

Victorian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Abalone	Greenlip abalone, blacklip abalone	Diving	71 licences	71 licences
Scallops	Scallop	Dredge	90 licences	90 licences
Bay and Inlet	Mixed species	Various	57 licences	57 licences
Rock Lobster	Southern rock lobster	Pots	107 licences and 7,235 pots	107 licences and 7,235 pots
Giant Crab	Giant crab	Pots	16 licences	14 licences
Inshore Trawl	Mixed species	Various	54 licences	54 licences
Wrasse (Ocean)	Wrasse	Handlines	22 licences	22 licences
Bait (General)	Mixed species	Various	12 licences	12 licences
Ocean (General)	Mixed species	Various	183 licences	171 licences
Aquaculture *a*	Abalone	Flow-through systems	10 licences	10 licences
	Freshwater eel, longfin eel	Recirculation units and cultured waters	12 licences	13 licences
	Mussels	Longlines	16 licences	16 licences
	Ornamental fish	Recirculation units and ponds	8 licences	9 licences
	Yabby	Recirculation units, ponds and farm dams	17 licences	17 licences
	Salmonids	Recirculation units and raceways	18 licences	18 licences
	Warm-water finfish	Recirculation units, flow-through system and ponds	16 licences	18 licences
	Other	*na*	18 licences	21 licences

a Aquaculture licence holders may culture more than one species on their licence.
na Not applicable.

Source: Victorian Department of Environment and Primary Industries

Queensland fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
East Coast Trawl	Tiger prawn, banana prawn, king prawn, Endeavour prawn, bay prawn, saucer scallop, bu	Otter trawl	374 licence holders	370 licence holders
River and Estuary Trawl	Banana prawn, bay prawn, tiger prawn	Beam trawl	87 licence holders	83 licence holders
Gulf of Carpentaria Inshore	Barramundi, king threadfin, blue threadfin, shark, grey mackerel	Net	88 licence holders	88 licence holders
East Coast Net (mainly Tropical)	Barramundi, king threadfin, blue threadfin, shark, grey mackerel	Net	105 licence holders	94 licence holders
East Coast Net (mainly Subtropical)	Mullet, tailor, whiting, bream, grey mackerel, shark	Net	94 licence holders	86 licence holders
East Coast Shark	Various shark species	Net	120 licence holders	115 licence holders
East Coast Handline (mainly Tropical)	Coral trout, redthroat emperor, various other reef species	Handline	192 licence holders	190 licence holders
East Coast Handline (mainly Subtropical)	Snapper, pearl perch, other rocky reef species	Handline	231 licence holders	226 licence holders
Line RQ (Handline) *a*	Coral trout, redthroat emperor, various other reef species	Handline	349 licence holders	347 licence holders
Line SM (Trolling) *b*	Spanish mackerel	Trolling	244 licence holders	240 licence holders
Estuary Crab	Mud crab, blue swimmer crab	Pot	417 licence holders	412 licence holders
Oceanic Crab	Spanner crab	Pot	232 licence holders	239 licence holders
Aquaculture	Prawns	Pond culture	58 development approvals (19 producing)	61 development approvals (16 producing)
	Barramundi	Pond and cage culture (incl. tank culture)	219 development approvals (21 producing)	221 development approvals (21 producing)
	Oyster	Rack and stick culture	84 development approvals (26 producing)	105 development approvals (30 producing)

Queensland fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
	Redclaw	Pond culture	156 development approvals (25 producing)	155 development approvals (23 producing)
	Freshwater fish	Pond and tank culture	214 development approvals (16 producing)	215 development approvals (14 producing)
	Eel	Pond and tank culture	53 development approvals (0 producing)	53 development approvals (1 producing)

a Coral Reef Fin Fish Fishery; the RQ symbol can be used only in the area defined for the East Coast Line Fishery symbol(s) appearing on the same licence.
b Spanish Mackerel Fishery; the SM symbol can be used only in the area defined for the East Coast Line Fishery symbol(s) appearing on the same licence.

Source: Fisheries Queensland, Department of Agriculture, Fisheries and Forestry

South Australian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Blue Crab	Blue swimmer crab	Pots	9 licence holders	9 licence holders
Central Zone Abalone	Greenlip abalone, blacklip abalone	Diving	6 licence holders	6 licence holders
Gulf St Vincent Prawn	King prawn	Trawl	10 licence holders	10 licence holders
Lakes and Coorong	Freshwater finfish, marine finfish, molluscs	Netting, line fishing, handlines	36 licence holders	36 licence holders
Marine Scalefish	Various finfish, crustaceans, molluscs	Netting, line fishing, handlines and traps	308 licence holders	306 licence holders
Miscellaneous	Various finfish, crustaceans, molluscs, worms	Traps, diving, etc.	14 licence holders	14 licence holders
Northern Zone Rock Lobster	Southern rock lobster	Pots	63 licence holders	63 licence holders
Restricted Marine Scalefish	Various finfish, crustaceans, molluscs	Netting, line fishing, handlines, traps	4 licence holders	3 licence holders
River Fishery	Freshwater finfish, crustaceans	Netting, pots	6 licence holders	6 licence holders
Southern Zone Rock Lobster	Southern rock lobster	Pots	180 licence holders	180 licence holders
Southern Zone Abalone	Greenlip abalone, blacklip abalone	Diving	6 licence holders	6 licence holders
Spencer Gulf Prawn	King prawn	Trawl	39 licence holders	39 licence holders

South Australian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
West Coast Prawn	King prawn	Trawl	3 licence holders	3 licence holders
Western Zone Abalone	Greenlip abalone, blacklip abalone	Diving	22 licence holders	22 licence holders
Aquaculture	Land-based Category A: native species to local area, e.g. yabby	Ponds, dams	37 licences	30 licences
	Land-based Category B: exotic species to locality, e.g. marron, barramundi	Ponds, dams and recirculation systems	42 licences	36 licences
	Land-based Category C: high risk, e.g. abalone	Ponds, recirculation systems	13 licences	13 licences
	Marine: abalone	Sea cages, contained longlines, uncontained benthic structures	9 licences	8 licences
	Marine: intertidal molluscs, e.g. oyster	Contained racks and contained longlines	9 licence holders	10 licence holders
	Marine: subtidal molluscs, e.g. blue mussel	Longlines	6 licence holders	38 licence holders
	Marine: tuna	Sea cages	10 licence holders	14 licence holders
	Marine: finfish	Sea cages	36 licence holders	23 licence holders

Source: Department of Primary Industries and Regions South Australia; South Australian Research and Development Institute

Western Australian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
West Coast Rock Lobster *a*	Western rock lobster	Pots	236 boats	240 boats
Abalone *b*	Greenlip abalone, brownlip abalone, Roe's abalone	Diving	41 active licences	37 active licences
Shark Bay Prawn	King prawn, tiger prawn, Endeavour prawn, saucer scallop	Trawl	18 licences	18 licences
Exmouth Gulf Prawn	King prawn, tiger prawn, Endeavour prawn	Trawl	15 licences	15 licences
Nickol Bay Prawn	King prawn, banana prawn	Trawl	14 licences	14 licences

Western Australian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Aquaculture	Pearls	Longlines	*na*	*na*
	Yabby	Ponds and farm dams	*na*	*na*
	Marron	Ponds and farm dams	*na*	*na*
	Blue mussel	Longlines	*na*	*na*

a Number of boats was presented because of changes in licencing and operation of the fishery.
b Number of active licences were given instead of active boats given in previous years because of a change in data collection processes.
na Not applicable.

Source: WA Department of Fisheries

Tasmanian fisheries profiles, 2015–16 to 2016–17

Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Abalone	Blacklip abalone, greenlip abalone	Diving	120 licence holders	121 licence holders
Rock Lobster	Southern rock lobster	Pots	311 licence holders	311 licence holders
Giant Crab	Giant crab	Pots	84 licence holders	82 licence holders
Scallop	Commercial scallop, doughboy scallop, queen scallop	Scallop harvester	59 licence holders	67 licence holders
Scalefish	Various	Netting/hooks	281 licence holders	275 licence holders
Aquaculture	Atlantic salmon	Sea cages	45 licence holders	45 licence holders
	Pacific oyster	Racking/line system	101 licence holders	103 licence holders
	Blue mussel	Longlines	6 licence holders	6 licence holders
	Rainbow trout	Sea cages	na	na
	Other	na	14 licence holders	12 licence holders
	Abalone	Land-based tanks	6 licence holders	6 licence holders

na Not applicable.

Source: Tasmanian Department of Primary Industries, Parks, Water and Environment

Northern Territory fisheries profiles, 2015–16 to 2016–17				
Fishery	Species	Method	Number (2015–16)	Number (2016–17)
Coastal	Finfish and bait	Line, net and trap	70 licence holders	73 licence holders
Offshore *a*	Mackerel, shark, reef fish	Trolling, hand and longline net, trap and trawling	58 licence holders	56 licence holders
Barramundi	Barramundi and threadfin	Gillnet	14 licence holders	14 licence holders
Mud crab	Mud crab	Crab pots	49 licence holders	49 licence holders
Other	Molluscs, oyster, sea cucumber, squid and aquarium fish	Hand harvest, jigging and a variety of other methods	24 licence holders	24 licence holders
Aquaculture *b*	Prawns	*na*	0 endorsements	0 endorsements
	Barramundi	*na*	1 endorsements	1 endorsements
	Others	*na*	3 endorsements	5 endorsements
	Pearls	*na*	4 licence holders	4 licence holders

a As a result of administrative changes in the Timor Reef Fishery and Demersal Fishery, both are now managed by individual transferrable quota and no restrictions apply to the number of licences that can be issued or held.
b Aquaculture licence holders may culture more than one species on their licences. The number of licences is included once for each type; if a licence is approved for barramundi, prawns and other species, it will be listed once in each category.
na Not applicable.

Source: Northern Territory Department of Primary Industry and Fisheries

2.3 Production by jurisdiction (State/Territory or Commonwealth)

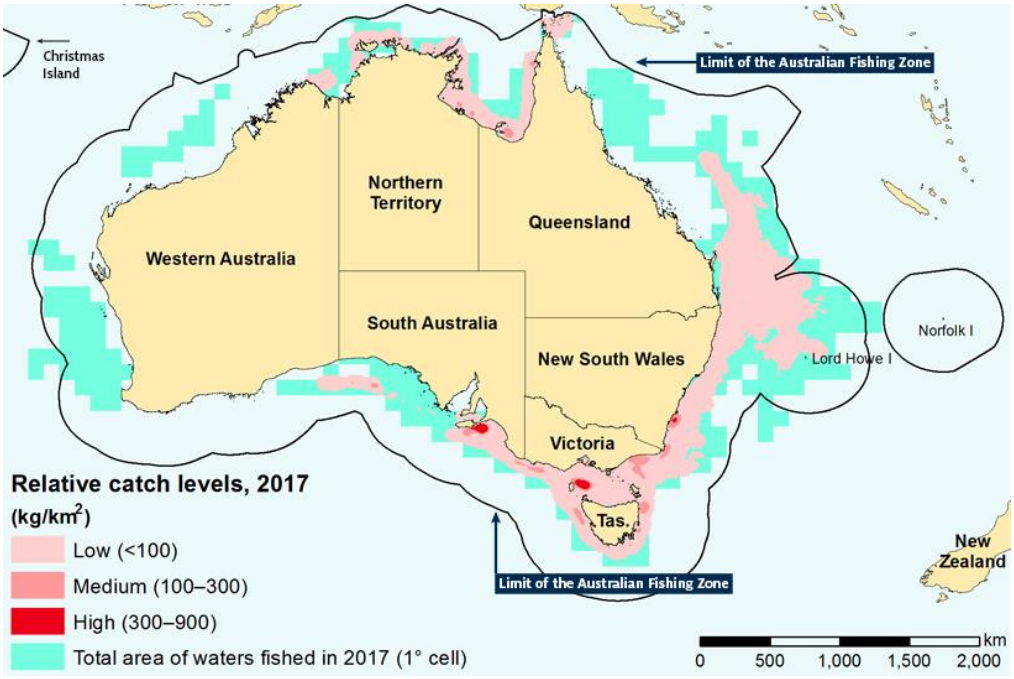
State Jurisdictional Profiles

Production by jurisdiction - terms used

- *Jurisdiction of catch*: *Whether the catch falls into state or Commonwealth jurisdictional waters.*
- *Location of catch: The state that the catch is landed in and includes Commonwealth catch distributed to the states.*

Australia has Six States and two territories and of these, in 2016–17, Tasmania enjoyed 31% of total fishery production value, followed by Western Australia (20%) and South Australia (16%).

Relative Catch Levels 2017



Source: Department of Agriculture & Water Resources: Agriculture.gov.au

Production by sector

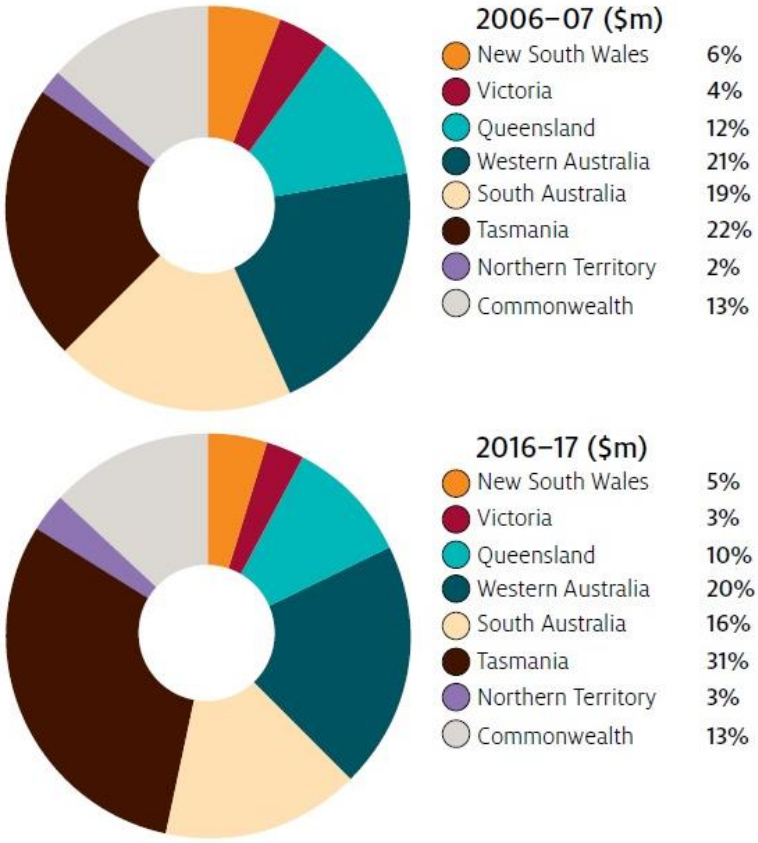
The largest proportion of gross value of the nation's commercial farmed and fishery and aquaculture industry is the 'Wild-catch' sector.

The wild-catch sector accounts for the majority of the GVP of Australia's commercial fishery and aquaculture industry. The sector comprises state fisheries (generally, fisheries operating within 3 nautical miles of the state's coast) and Commonwealth fisheries (fisheries operating between 3 and 200 nautical miles of Australia's coastline).
The development of Australia's aquaculture sector between 2006–07 and 2016–17 has resulted in the sector increasing its share of total production value and volume.

Jurisdiction of catch refers to whether the catch falls into state or Commonwealth jurisdictional waters. It should be understood that Australia is a confederation of individual states, all of which have their own parliaments and enjoy considerable autonomy and responsibility for framing state legislations many of which differ between individual states. Location of catch refers to the state that the catch is landed in and includes Commonwealth catch distributed to the states.

The greatest changes in production value during the decade between 2006/7 and 2016/7 came from Tasmania, which increased production substantially in real terms, by 9% over this period. This was a result of substantial growth in the Tasmanian aquaculture industry, particularly in salmonid production.

Shares in gross value of fishery and aquaculture production by jurisdiction, 2006–07 and 2016–17



***Note**: Percentages are unadjusted for tuna introduced into SA farms from tuna caught in the Southern Bluefin Tuna Fishery and calculated based on the sum of gross jurisdictional production values,*

Source: ABARES, Australian fisheries and aquaculture statistics 2017

Ocean-caught products made up for 56% ($1.74 billion) of fishery and aquaculture GVP. Farmed seafood accounted for the remaining 44 % ($1.35 billion).

Wild-catch production volume fell by 5% to 166,022 tonnes in 2017 and an increase in the value of wild-caught mollusc production was more than counterbalanced by a decline in the value of wild-caught finfish and crustaceans.

Aquaculture GVP increased by 4% to $1.35 billion in this period and production volume increased by 4% to nearly 94,000 tonnes. The increase in value was largely attributed to higher production value of salmonids, which increased by 5% to $756 million.
Salmonids were the most valuable farmed species in 2016–17. This was 9% higher in real terms than a decade ago. The value of this sector increased by 32% in real terms, caused largely by the growth of this industry, largely reflecting expansion of the salmonid industry.

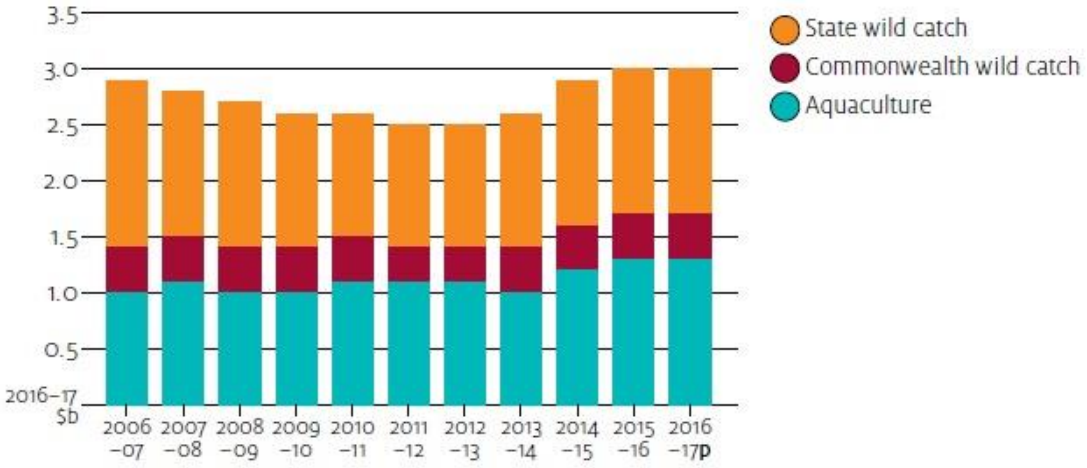
The value of ocean-catch declined by 5% in real terms because of lower finfish and mollusc production value.

Australian fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)
Total wild catch	1,742.4	166,022
state wild catch	1,339.0	117,431
Commonwealth wild catch	403.4	48,592
Aquaculture	1,346.8	93,968
Total a	3,057.8	255,304

a To avoid double counting, total has been reduced to allow for southern bluefin tuna caught in the Commonwealth Southern Bluefin Tuna Fishery as an input to farms in South Australia.
Note: See statistical tables S1, S2 and S17 for detailed statistics.

Value of Australian fisheries and aquaculture production by sector, 2006–07 to 2016–17



Source: ABARES, Australian fisheries and aquaculture statistics 2017

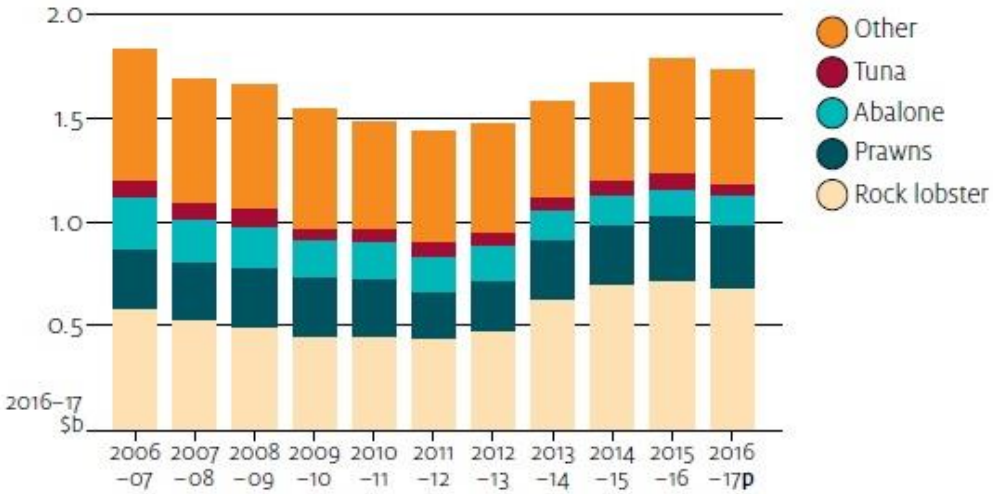
Production: Wild-catch (ocean and riverine harvest) fisheries

In the decade from 2007 to 2017 ocean-caught fish volume decreased; largely due to lower quantities of landed finfish. A number of factors were responsible for this and the main ones were lower allowable catch volumes for some fish species and fluctuations of market dynamics including an exchange rate that facilitated comparatively cheaper imports. Counterintuitively high fuel costs (Australian fuel consumption is heavily reliant on imports, with 75% of crude oil and 55% of refined petroleum sourced overseas) contributed to these costs.

In contrast, wild-caught production volume increased by 14% in 2015–16 to an eight-year high of 174,247 tonnes. This was largely the result of a substantial increase in the catch volume of small pelagic species and the highest tuna catch since 2006–07. However, the volume of wild-caught fisheries production declined by 5% in 2016–17 to 166,022 tonnes because of a 9% decline in finfish catch to 115,495 tonnes.

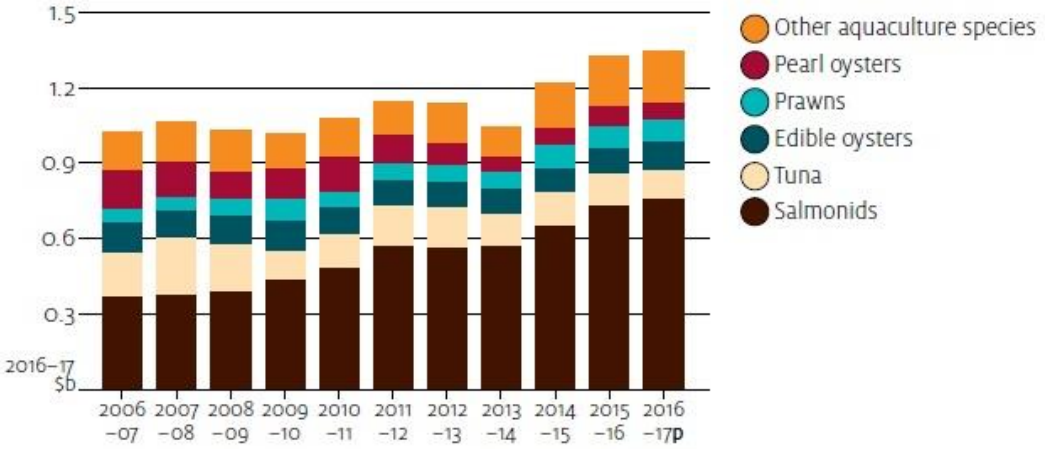
The real value of wild-caught production in 2011–12 was 22% below the 2006–07 level due to lower rock lobster, prawn and abalone production value, which decreased by a total of $292 million (in 2017 dollars). Wild-catch value has increased each year 2011/2 and 2015/6 due to significant increase in the value of rock lobster. Ocean harvested production value fell slightly in Y 2016/7 to just below $1.3/4 billion. A reduction in the value of finfish and crustacean catch offet increases in production value across all major wild-caught mollusc species.

Wild-catch production value by major species group, 2006–07 to 2016–17



p Preliminary estimate.

Value of Australian aquaculture production by major species group, 2006–07 to 2016–17



p Preliminary estimate.

ABARES
Australian fisheries and aquaculture statistics 2017

Species

Tuna, principally harvested in Commonwealth controlled waters, is the most valuable wild-caught finfish species harvested in Australia. However, in 2016/7 17 the total value of this catch fell by 14% (approximately $64 million) mostly due to a decrease in catch volume.

Southern blue-fin tuna remained he most valuable of all tuna species harvested in 2016–17. This species is chiefly produced in bespoke ‘ranches’ around Port Lincoln in South Australia; but ocean-caught blue fin tuna adds significantly to the overall catch value. The’ farm-gate’ value of Southern blue-fin tuna was $115 million in the last financial year.

Ocean harvested prawn production grew 3% in 2016/7 to reach a figure of $310 million. The value of prawn production in the Commonwealth Northern Prawn Fishery (NPF), fell by 7% to $114 million whilst, conversely Queensland wild-caught prawn value grew by a little over 25% to just under $80 million – the highest real term level since 2009–10.

Aquaculture

In the decade between 2006/7 and 2017/8 the volume of Australian aquaculture production has expanded by over 50% to some 94,000 tonnes. This has resulted in its share of combined fishery and aquaculture value returning an overall 8% growth in the decade. This increase was largely due to salmonid production in Tasmania and correlates with a similar global trend.

The value of salmonid production more than doubled in real terms in the decade between 2006/7 and 2016/7 from $369 million to $756 million. This made the species the single most valuable group produced in Australia in 2016–17; with a value of $756 million.
Other high value farmed species have included southern blue-fin tuna ($115 million), edible oysters ($112 million), prawns ($86 million) and pearl oysters ($70 million).

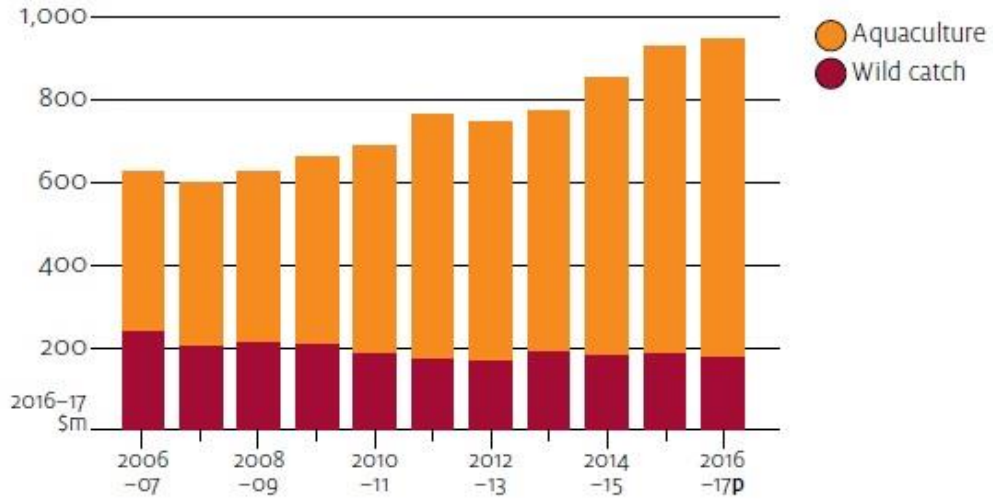
TASMANIA

In 2016–17 Tasmania comprised 31% of total fishery production value, followed by 20% in Western Australia and 16% in South Australia.

These percentages are calculated based on the sum of gross jurisdictional production values, and exclude tuna caught in the Southern Bluefin Tuna Fishery and introduced into South Australian farms.

Tasmanian production value grew markedly in real terms in the decade between 2006/7 and 2016/7, which saw a 9% increase, due to growth of aquaculture, predominantly in **salmonid** production.

Tasmanian fisheries and aquaculture production by sector, 2006–07 to 2016–17



p Preliminary estimate.

Tasmanian fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	175.9	3,620	–4	–23
Aquaculture	770.9	55,119	6	–6
Total	946.9	58,739	4	–7

ABARES
Australian fisheries and aquaculture statistics 2017

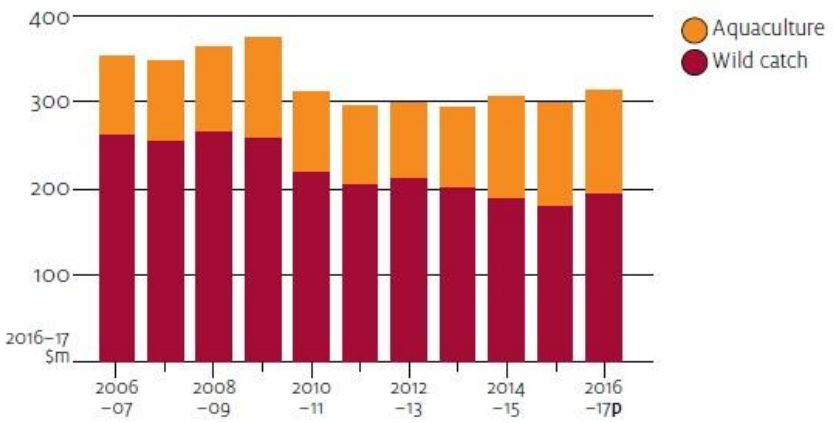
QUEENSLAND

In 2016/7 the value of Queensland wild-catch fisheries increased to $193 million which represented some 10% growth; driven principally by an increase in ocean harvested **prawn catch** which saw a $79 million (26%) increase. At $43 million **king prawns** made up the largest element of this increase, followed by **tiger prawns**, which accounted for a $25 million increase. A fall in production volume saw the value of **scallop** drop by 18% (around $2.5 million). In the decade between 2006/7 and 2016/7 the value of ocean harvest declined by 26%. Much of this deterioration was as a result of a lower **finfish** catch value.

Aquaculture

Largely as the result of a 3% decline in **prawn** production Queensland's aquaculture value decreased by 1% in 2016–17 to $116.5 million. The fortunes of this industry have vacillated in both value and volume over the past decade as a result of the vagaries of global market conditions and import competition causing unstable **prawn** production volume and value in consequence. In response to increases in demand for sea-fish aquaculture **barramundi** production grew over the period.

Queensland fisheries and aquaculture production value by sector, 2006–07 to 2016–17



p Preliminary estimate.

Queensland fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	192.9	19,867	10	3
Aquaculture	116.5	7,869	–1	1
Total	309.4	27,736	6	3

Source: ABARES, Australian fisheries and aquaculture statistics 2017

NEW SOUTH WALES

The principal species groups harvested in NSW waters are **prawns** (wild-catch), **rock lobster** (wild-catch) and **oysters** (aquaculture).

Fishery output in NSW has increased in value by 2% ($154 million) in 2016/7 and but actual volume fell by 7% to 15,425 tonnes.

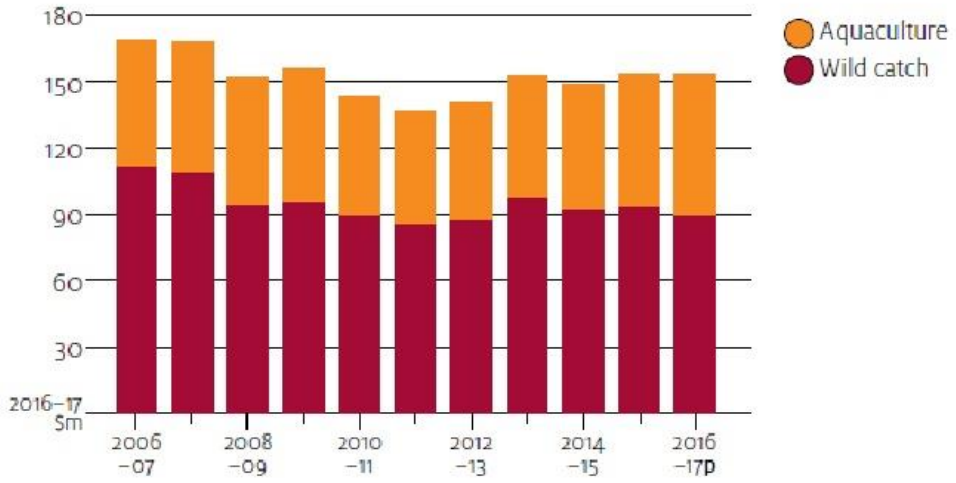
Wild-catch

In 2016–17 as a result of result of a 10% fall in landed catch volume gross value of NSW wild-catch fishery production decreased by 2% to $89 million and continued a downward decade long trend caused by a declining **finfish** catch. This drop in **finfish** production is a result of fishermen exiting the industry combined with an increase in overseas competition seeing more imported frozen finfish available for sale in the Australian domestic marketplace.

Aquaculture

The 2016/7 FY saw the gross value of NSW aquaculture production increase by 7% to $65 million. The most significant proportion of this increase was attributable to aquaculture **oyster**, increasing in value by 6% to $45 million making it the highest real-term value since 2009–10. Mainly due to decreased edible oyster production caused by difficult environmental conditions the value of the NSW aquaculture sector followed a downward trajectory in the decade 2006/7 – 2016/7.

NSW fisheries and aquaculture production value by sector, 2006–07 to 2016–17



p Preliminary estimate.

NSW fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	89.3	10,574	–2	–10
Aquaculture	64.6	4,851	7	1
Total	153.9	15,425	2	–7

Note: See statistical table S7 for detailed statistics.

Source: ABARES, Australian fisheries and aquaculture statistics 2017

VICTORIA

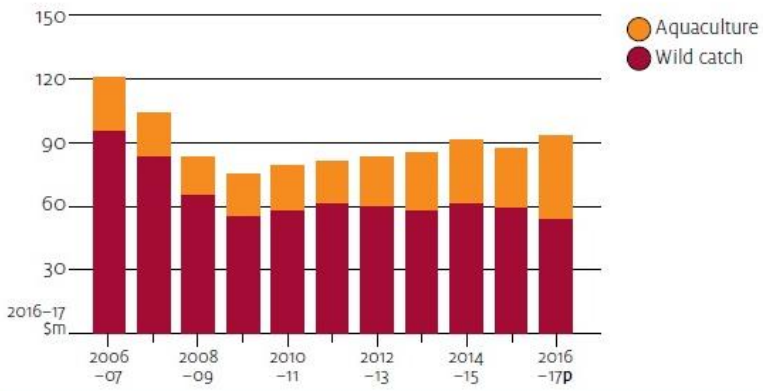
Principal species groups in Victorian waters are **abalone** (both wild catch and aquaculture) and **southern rock lobster** (wild catch). An increase in the value of aquaculture production saw the gross value of Victorian fishery and aquaculture production increase 10 % in 2016–17 to $94 million.

Wild-catch

A decline in production value for various **finfish** species, but particularly **King George whiting** and **snapper**, and lower production value of **rock lobster**, **prawns** and **squid** saw wild-catch fishery production value fall by 6% in 2016–17 to $54 million.

In the same period a 9% decline in catch volume resulted in a fall in value of **rock lobster** of 7% to $23 million. In the decade 2006/7 2016/7 the value derived from Victorian wild-catch fisheries fell by 41% in real terms; mostly as a result of strong falls in **abalone** average unit values and volumes produced.

Victoria fisheries and aquaculture production value by sector, 2006–07 to 2016–17



p Preliminary estimate.

Victorian fisheries and aquaculture by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	54.4	4,845	–6	8
Aquaculture	39.3	3,147	43	18
Total	93.7	7,992	10	12

Note: See statistical table S8 for detailed statistics.

ABARES
Australian fisheries and aquaculture statistics 2017

Aquaculture

In the past decade aquaculture value has generally increased due to increase in the value of **salmonid** and **abalone** production. The gross value of aquaculture production in this state has increased by 43% in the past FY to $39 million.

The same period has seen the value of Victorian **salmonid** production reach its highest level in real terms since 2003–04, while the value of aquaculture **abalone** has increased by 60% to around $18 million.

SOUTH AUSTRALIA

Principal species groups in South Australia are **southern rock lobster** (wild catch), **southern bluefin tuna** (aquaculture), **prawns** (wild catch). In the last FY (2017-8) the gross value of SA fishery and aquaculture production fell by 6% to $484 million.

Wild-catch

In this period SA wild-catch fishery GVP decreased by 4% to $253 million.
An increase in wild-caught **abalone** production value was more than counter-balanced by a decline in production value of **rock lobster** and Australian **sardine**. This fall in **lobster** value was largely the result of a decline in average price while the production value of sardine (which are used as feed for farmed southern blue-fin tuna) declined as a result of both lower catch volume and lower average prices. Wild-caught **abalone** catch, by comparison, increased in value by 24% to $28 million, reflecting an increase in catch volume.

Aquaculture

In the decade between 2006/7-2016/7 the value of SA aquaculture fishery production was dependent on the export market for **southern blue-fin tuna** and volatility within this market directly affected price.
As most **tuna** exported from South Australia is destined for Japan, the value of **tuna** is directly affected by volatility in the Japanese exchange rate.

WESTERN AUSTRALIA

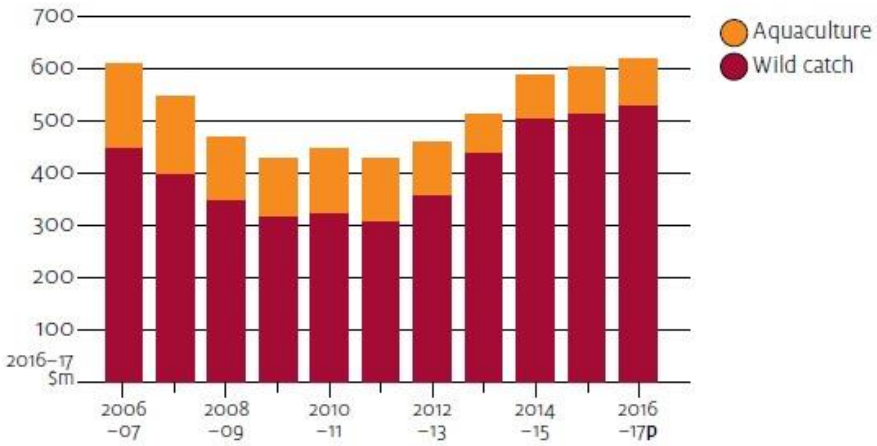
Principal species groups are **western rock lobster** (wild-catch), **pearls** (aquaculture), **prawns** (wild catch). In 2016–17 FY the gross value of WA fishery and aquaculture production value improved by 5% to $620 million, while volume grew by 12% to 23,818 tonnes.

Western Australian fisheries production is dominated by wild-catch fisheries, which comprise some 78% of the total value over the last decade.

Wild-catch

FY 2016/7 saw a 5% growth in gross value to reach $530 million. **Rock lobster** is the single most important contributor to WA wild-catch value contributing over 75% of total wild-caught value. Production increased by 2% to $401 million, and this increase in production volume more than offset a decline in average price. The value of **scallop** production more than tripled to $15 million in the same period.

WA fisheries and aquaculture production value by sector, 2006–07 to 2016–17



p Preliminary estimate.

WA fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	529.5	22,316	5	9
Aquaculture	90.5	1,502	1	110
Total	620.0	23,818	5	12

Source: ABARES, Australian fisheries and aquaculture statistics 2017

Aquaculture

Aquaculture **finfish** production (largely **barramundi**) more than doubled in the last year to $13 million, while the value of **pearl** production declined by 10% to $70 million. Overall the gross value of WA aquaculture increased by 1% in 2016–17 to $90 million. During the previous decade gross value of WA production has trended downward.

TASMANIA

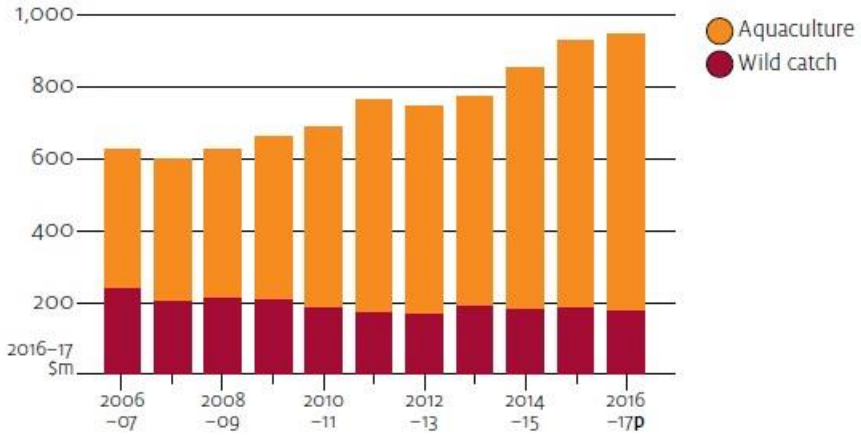
Key species groups in this state are **salmonids** (aquaculture), **southern rock lobster** (wild catch) and **abalone** (wild catch). In the past FY (2016-7) the gross value of Tasmanian fishery and aquaculture production increased by 4% just under $950 million. Tasmanian fishery production continues to display an upward trajectory, driven by a growing aquaculture industry.

Wild-catch

The gross value of Tasmanian wild-catch industry decreased by 4% in 2016–17 to $176 million. The two most important wild-caught species in Tasmania are **rock lobster** and **abalone**.

The value of wild-caught **abalone** increased in this period by 5% cent to $84 million, reflecting an escalation in average price. In contrast the value of **rock lobster** production declined because of lower catch and a fall in average unit values.

Tasmanian fisheries and aquaculture production by sector, 2006–07 to 2016–17



p Preliminary estimate.

Tasmanian fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	175.9	3,620	–4	–23
Aquaculture	770.9	55,119	6	–6
Total	946.9	58,739	4	–7

ABARES
Australian fisheries and aquaculture statistics 2017

Aquaculture

The gross value of Tasmanian aquaculture production has increased by 6% in the past year. **Salmonids** accounted for 96% of total aquaculture production value in 2016–17 and constitute the state's main variety derived from aquaculture. **Salmonid** production volume fell 6% 51,298 tonnes, whilst corresponding value increased by 5% to $739 million. A global supply shortage in 2016 because of production issues in major producers Norway and Chile resulted in international prices rising in 2015–16 and 2016–17. In turn, Tasmanian **salmonid** prices increased by 12% in 2016–17 to around $14 a kilogram – the highest level in real terms since 2007–08.

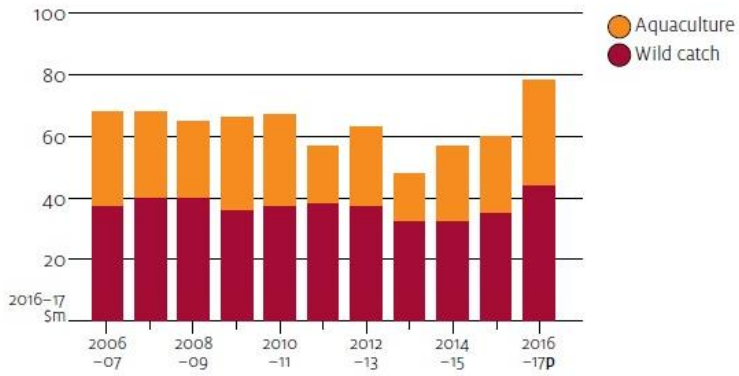
NORTHERN TERRITORY

Main species groups comprise **pearls** (aquaculture), **mackerel** (wild-catch), **goldband snapper** (wild-catch), **crabs** (wild-catch), **barramundi** (wild-catch, aquaculture). FY 2016/7 saw 32% growth to $78 million of production value of NT fisheries and aquaculture. NT annual fishery production was 15% higher in real terms compared with a decade previously which was a result of a $7 million (in 2016–17 dollar) increase in wild-caught production and a $3 million (in 2016–17 dollar) increase in aquaculture production.

Wild-catch

Largely as the result of an increase in the production value of **crabs**, **mackerel** and **goldband snapper** the gross value of the NT wild-catch sector increased by 26% in 2016–17 to $44 million. The gross value of the NT wild-catch sector increased by 20% in the last ten years due to an increase in the production value of finfish which more than offset declines in the production value of crabs and molluscs.

NT fisheries and aquaculture production value by sector, 2006–07 to 2016–17



p Preliminary estimate.

NT fisheries and aquaculture production by sector, 2016–17

Sector	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Wild catch	43.9	6,722	26	10
Aquaculture	34.4	na	40	na
Total	78.3	na	32	10

na Not available.

Source: ABARES, Australian fisheries and aquaculture statistics 2017

Aquaculture

The value of aquaculture production in the Northern Territory increased by 40% in 2016–17 to $34 million. Confidentiality requirements preclude provision of any species value of production breakdown.

COMMONWEALTH

Key species groups caught in Commonwealth waters are wild-catch prawn, tuna and shark.

Predominately as a result of lower **prawn** and **finfish** production value, gross value of Commonwealth fisheries production declined by 8% 2016–17 to $403 million.

Species

Despite production value declining by 10% (to $117 million) **prawns** remained the most valuable species caught in Commonwealth fisheries in 2016/7.

The decline in production value was principally because of changes in catch composition in the Northern Prawn Fishery, switching from higher unit value **tiger prawns** to relatively lower unit value **banana prawns**. **Finfish** other than **tuna** made the largest contribution to Commonwealth fishery production value but declined by 8% to $191 million.

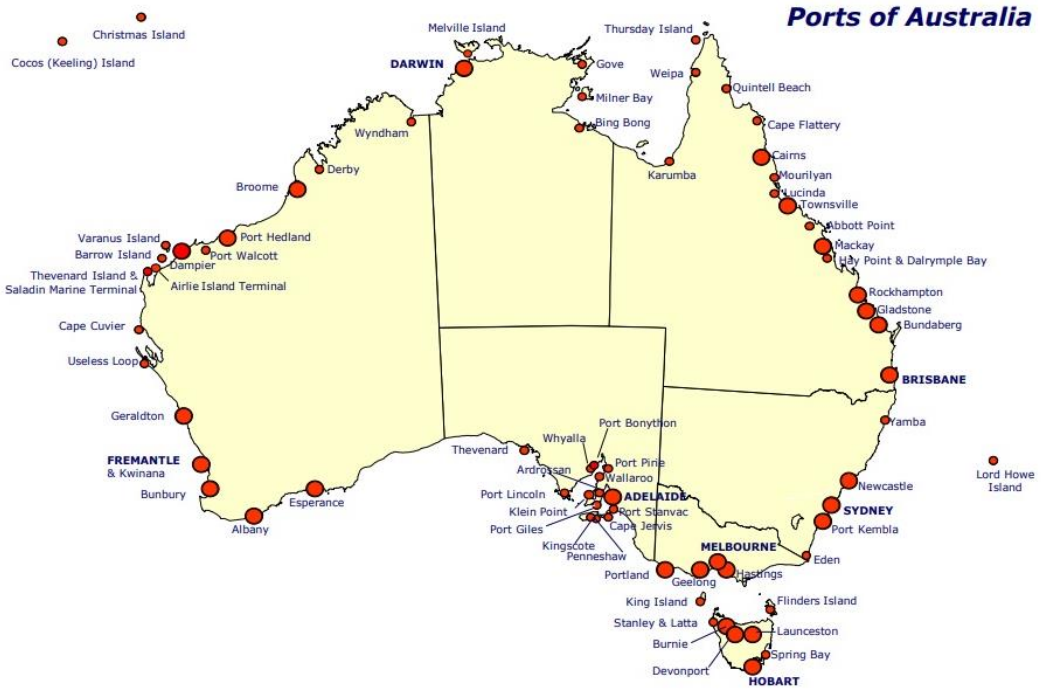
Although there was an increase in the gross value of production in the **southern blue-fin tuna** fishery, **tuna** production decreased by 14% in 2016–17 to $64 million.

Molluscs make a relatively minor contribution to Commonwealth fishery GVP but in 2016–17 **mollusc** production value increased to its highest level in real terms since 1999–2000. This was the result of a 30% increase in the value of **scallop** production in the Bass Strait Central Zone Scallop Fishery.

Source: ABARES, Australian fisheries and aquaculture statistics 2017

Section 3: THE SEAFOOD TRADE

3.1 Australian Ports



As an island nation, Australia is dependent on shipping for both international trade and domestic freight movements (coastal trading). As such, major ports and related infrastructure provide the key locations for supply chain activities servicing both bulk and container facilities.

The private sector is the major player in port operations and investment, with the regulatory framework set by government. State and territory governments have responsibility for land use planning and controls, including for ports, their adjacent land areas and connecting transport systems. Local government also makes decisions that affect ports, including on matters such as planning requirements and local road access.
State or territory governments have historically owned port authorities; however there is a trend toward privatising these assets on a long-term lease basis.

Commonwealth responsibilities relating to ports include: environmental assessment of port developments where matters of national environmental significance are concerned, safety and security matters, customs, and implementing Australia's international maritime obligations as they relate to ports.

A full list of Australian ports and contact details may be found at ***Annex C: Australian Ports - General Cargo (mass tonnes) for 2014/2015***

3.2 Fisheries Products Trade – Imports & Exports

Australian fishery and aquaculture exports are dominated by high unit value products such as rock lobster, tuna and abalone. Imports of fishery and aquaculture products largely consist of lower unit value products such as canned or frozen finfish, but also includes higher unit value products such as prawns and salmon. Australia is a net importer of fishery and aquaculture products based on volume. The real value (in 2016–17 dollars) of net imports increased from $66 million in 2007–08 to $741 million in 2016–17.

Exports by commodity

Australia's seafood export value decreased by 6% in 2016–17 to $1.33 billion, while seafood export volume declined by 17% to 51,371 tonnes. The total value of fishery and aquaculture product exports was 24% lower in real terms in 2016–17 compared with 2006–07.

Crustacean and **mollusc** product exports are the largest contributor to Australia's total fishery and aquaculture product export earnings. This is mostly the result of three commodities: **rock lobster**, **abalone** and **prawns**.

Rock lobster was the highest value exported fisheries and aquaculture product in 2016–17 with exports totalling $676 million. Export values of Australian **rock lobster** exports remained relatively high in 2016–17 despite competition from North America and New Zealand to key Australian export markets. The value of **abalone** exports increased by 3% in 2016–17 to $187 million and **abalone** exports to China nearly doubled to $45 million. The value of **prawn** exports remained largely unchanged in 2016–17 at $114 million. An increase in export volume was offset by a decline in average export unit values. The value of Australian **tuna** exports fell by 11% in 2016–17 to $144 million. This was largely due to a decline in the value of **southern bluefin tuna** and **yellowfin tuna**. Australian **tuna** exports are dominated by **southern bluefin tuna**, which are largely farmed in South Australia and exported to Japan. In 2016–17 the value of **tuna** exports to Japan declined to $127 million. This reflected a decline in export volume more than offsetting an increase in average export price.

Fishery and aquaculture product exports, 2016–17

Product group	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Crustaceans and molluscs	1,026.5	20,136	–3	2
Edible finfish	306.1	31,235	–14	–26
Non-edible	102.6	na	–17	na
Total	1,435.2	na	–7	na

na Not available.

Source: ABARES, Australian fisheries and aquaculture statistics 2017

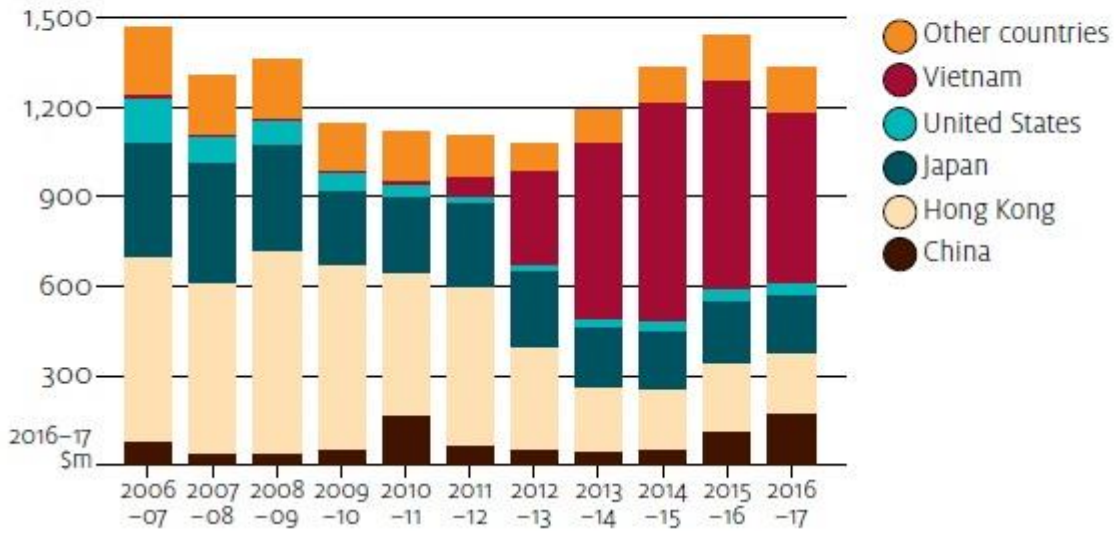
Exports by destination

The major export markets for Australia in 2016–17 were **Vietnam** ($575 million), **Hong Kong** ($232 million), **Japan** ($223 million), **China** ($171 million) and the **United States** ($53 million).
Combined, these destinations made up 87% of fishery exports.

In the 2016/17 financial year, under the provisions of the China-Australia Free Trade Agreement, the tariffs on a number of seafood products, including **abalone** and **rock lobster**, were reduced to 3% from 15%.
This occasioned an increased in trade of $63 million in 2016–17 and became the largest export increase to single export destination. The increase in export value was driven by an increase in the value of **rock lobster** and **abalone**.
Under ChAFTA, this tariff was eliminated entirely on 1 January 2019.

In 2016–17 exports to **Vietnam** declined by $107 million, largely reflecting a decline in the export value of **rock lobster**.

Value of exports by destination, 2005–06 to 2016–17



Imports by commodity

Seafood imports increased by 6% in 2016–17 to $1.90 billion. This contributed 87% to the total import value of all fishery and aquaculture products. Seafood import volume increased by 2% to 226,386 tonnes. The value of Australian fishery product imports was 17% higher in real terms in 2016–17 compared with 2006–07. Most of this increase is attributed to higher imports of seafood products, which increased by 27% in real terms from 2006–07 to 2016–17.

The total value of fishery and aquaculture product imports increased by 4% in 2016/17 to $2.18 billion. Edible **finfish** imports increased by 6% to $1.13 billion to account for around half of seafood import value in 2016–17. The total value of **crustacean** and **mollusc** imports increased by 7% in 2016–17 to $768 million. Imports of non-edible fishery and aquaculture products decreased by 6% in 2015/16 to $275 million.

The value of **prawn** imports remained largely unchanged in 2016–17 at around $400 million although the composition of **prawn** products changed away from frozen imports towards prepared or preserved products. **Tuna** (largely canned) remained the single most valuable imported **finfish** with a total import value of $303 million in 2016–17.

Australian imports of **salmonid** products reached a record $217 million in 2016–17. The value of **salmonid** import products increased by 67% in real terms between 2006/07 and 2016/17. This increase occurred despite domestic **salmonid** production value more than doubling in real terms over the same period to $756 million with exports remaining only a relatively minor share of domestic production.

Fishery and aquaculture imports, 2016–17

Product group	Value ($ million)	Volume (tonnes)	Value change (%)	Volume change (%)
Crustaceans and molluscs	767.9	69,454	7	2
Edible finfish	1,901.0	156,912	6	2
Non-edible	275.4	na	−6	na
Total	2,176.4	na	4	na

na Not available.

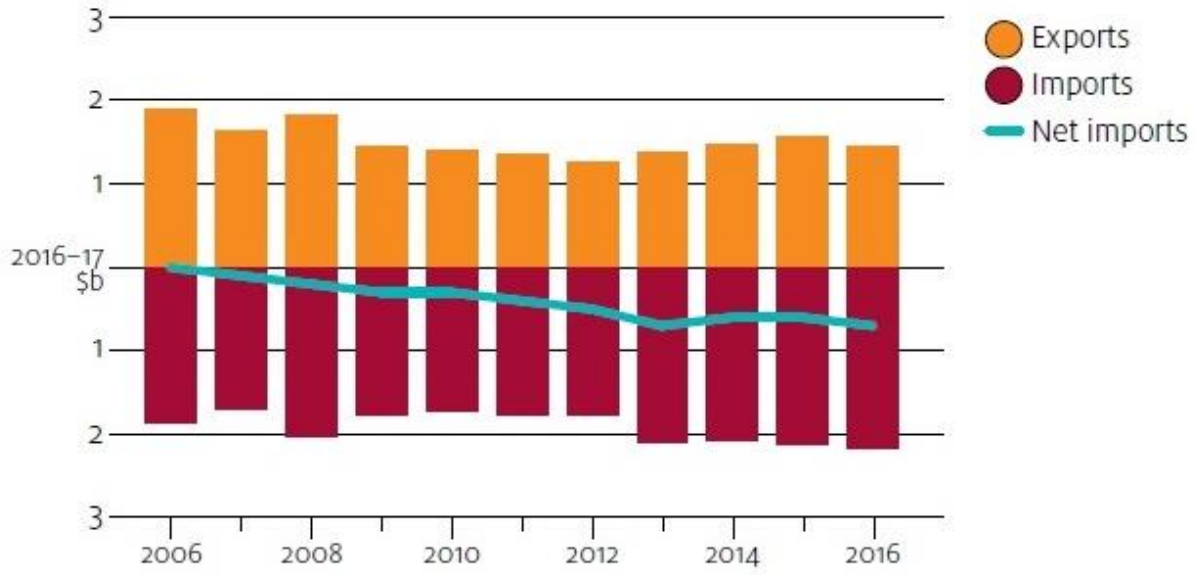
Source: ABARES, Australian fisheries and aquaculture statistics 2017

Imports by origin

The major sources of Australian edible fishery and aquaculture product imports in 2016–17 (excluding live products) were **Thailand** ($455 million), **China** ($305 million), **Vietnam** ($243 million) and **New Zealand** ($216 million).
Together, these countries accounted for 64% of imports in 2016–17. These countries also accounted for the majority (66%) of imports in 2006–07.

The major product groups imported from Thailand are **tuna** (mostly canned tuna) and **prawns**. Significant imports from China include **prawns**, **scallops**, **squid** and **octopus**. Imports from Vietnam are mostly **prawns** and **fish fillets**. Imports from New Zealand are predominantly **finfish** products.

Australian fishery export and import value, 2006–07 to 2016–17



It has been noted that Australia became a net importer of fishery and aquaculture products in 2007–08. The value of Australian fishery product imports was 17% higher in real terms in 2016–17 compared with 2006–07.

Seafood imports are equivalent to 85% of the value of exports. Over half of imported fish by value are fresh, chilled or frozen, while approximately 40% arrives in cans.

New Zealand is a significant source of Australia's imports of fresh and frozen fish (predominantly **hoki**, **salmonids** and **shark**), with **South Africa**, **Argentina** and **Namibia** also contributing large volumes of hake. **Denmark**, **New Zealand** and **Norway** are the main sources of imported farmed **Salmon**. Imports from **China** and **Vietnam** have increased over recent years, dominated by imports of frozen **prawns**, **squid** and **octopus**.

Tuna is Australia's major canned seafood import with the majority coming from **Thailand**. Other major canned imports are **salmon**, mainly from the **USA**, and **sardines**, mainly from the **UK**.

Some Australian fishers and fish farmers ship their raw seafood to China, Thailand or elsewhere for processing and then re-import the processed product for sale in Australia to take advantage of the lower labour cost available overseas. This practice is set to become more common, an example is the family-owned Australian company Kailis Bros which recently sold 90% of its seafood processing, wholesale and export business to a Chinese conglomerate.

Thailand has become a global hub for **tuna** canning and now packs more than two thirds of the canned **tuna** seen in supermarkets around the world, including most of the leading brands, like John West and Sirena in Australia. These become "glocal" (local-global) items, using Australian fish that has been sent to Thailand for processing and then shipped back again.

Prices of imports are (depending on the vagaries of a sometimes erratically fluctuating exchange rate) as high or greater than an equivalent Australian product. Some Sydney seafood businesses are prepared to pay more for imported New Zealand seafood than the Australian produce because of perceived greater seafood quality or size grading although Australians have traditionally preferred to consume Australian-grown produce and seafood, due to its perceived quality, and the economic and social benefits of supporting local industry. Some seafood products, such as salmon or snapper, will generally only be accepted by some Australian consumers if they are Australian. Some other products, such as canned **tuna**, are purchased knowing the fish is processed offshore. **Barramundi**, the iconic Australian fish, is often sourced form from **Vietnam**, having been farmed and frozen. The processed products – **crumbed prawns** or **garlic prawns** – are also usually from **Asia**, and **bright yellow-dyed smoked cod** often comes from **South Africa**.

The importance of imports to the nutritional and financial wellbeing of about 30% of Australian households with insufficient disposable income to buy fresh Australian seafood has not been widely recognised by Australian fishers or farmers, especially those critical of cheaper imports. While the majority of Australians may prefer to buy Australian produce the limited availability and the associated high prices keeps local produce beyond the reach of many consumers.

Imports typically make up more than half of the seafood range in the major supermarket chains; the cooked whole **vannamei prawns** and **basa fillets** form the cornerstones of supermarkets' 'Deli' seafood sections; but Independent fishmongers and high-end supermarkets (such as Harris Farm) focus more on Australian produce and sell less imported seafood, but even here it is difficult to find, for example, a carbonara mix that contains exclusively Australian components.

The market dynamic between imports and domestic seafood is typically complex and fluctuating, often because of changes in the value of the Australian dollar and the variable nature of global seafood supply and demand.

Some imports such as **scallops** and **squid** are complementary to equivalent Australian goods because they fill supply gaps in the Australian off season and particularly in 'bad years' when catches are extraordinarily low. Imported **scallops** help keep all scallops 'on the menu' and imported **squid** provides raw material for squid processors in Australia.

UK Imports

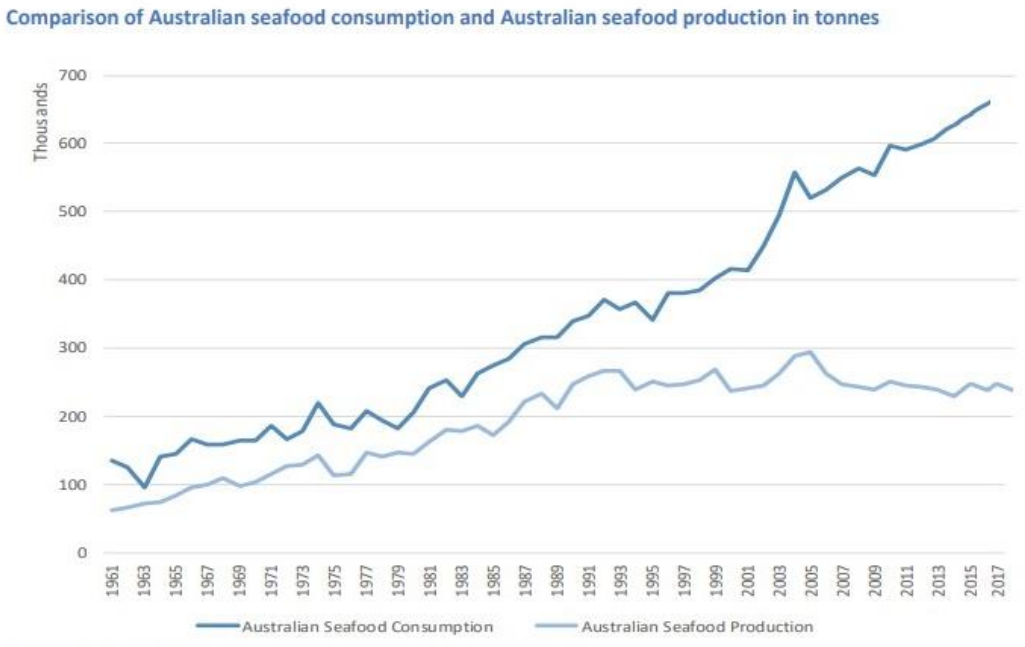
Last year, Australia imported over $4million worth of tinned **sardines**, $400k of **mackerel** and $300k of **herrings** from the UK. Although this figure is minute in comparison to the enormous quantities imported from SE Asia and even other European countries, the potential exists to increase market share and to gain new share by diversification into other species as demand in Australia increases and a free trade agreement with Australia becomes possible in future years.

3.3 Seafood Demand in Australia

Demand has gradually increased over the last decade. In 2012–13 Australians each consumed an average of 15 kilograms (process weight) of seafood, compared with 13 kilograms in 2000-01 and that trend continues. IBISWorld is predicting per capita seafood consumption to rise to 19.7 kilograms by 2021. Increasing awareness about the health benefits of certain types of fish and seafood continue to drive overall fish and seafood consumption. However, any corresponding growth in Australia's fishing and aquaculture industries is anticipated to be more gradual with revenue forecast to grow at an annualised 0.9% and 2.7%, respectively, between 2015-16 and 2020-21.

The potential for growth in Australia's ocean fisheries production is limited by relatively low productivity from natural sources. Aquaculture ranks amongst Australia's most profitable industries and is seen as a viable way to maintain seafood production in the face of continuing depletion of national and world fishing stocks. Aquaculture occurs throughout the continent, but is largely regionally based and makes a substantial contribution to regional growth and has the ability to expand to help meet both international and domestic demand; but such expansion is by no means a given.

The value of aquaculture production is now over $1 billion. The largest increase over this decade has come from the value of production of **salmonids** (salmon and trout) and **edible oysters**.
In 2012–13 farmed **salmonids**, almost entirely from Tasmania, were Australia's most valuable fish. However, industry difficulties are expected to challenge growth. Domestic aquaculture may be able to expand to reduce the anticipated deficiency, but this industry will need to develop substantial additional capacity in order to deliver large tonnages of species that meet Australian consumers' requirements for cheap, boneless, skinless white-flesh fillets. So, seafood imports will continue to be necessary to meet domestic demand in Australia in the foreseeable future.



Source: (FAO) Food and Agriculture Organization of the United Nations

3.4 Consumer Trends

Seafood forms a significant part of the Australian diet – Australians eat around 25 kg of seafood per person every year. Despite the foregoing recent research indicates Australians are eating marginally less seafood (according to research company Nielsen) who finds the overall dollar sales for seafood fell 0.3% in the 12-months ended 25 March 2017, when compared to the prior 12-month period. Nielsen said the fall was driven by a slight decline in both the number of households purchasing seafood and how much seafood was purchased by households.

The study however found that seafood was still purchased by 95% of Australian households within the year, with each household spending an average of AU$ 160 across 16 different shopping trips.

Fresh seafood accounted for 49% of all purchases, canned 26% and frozen 25%. “Nielsen Homescan shows that while fresh and chilled make up the largest proportion of sales, the number of consumers who purchase fresh or chilled exclusively is very low – 85% of buyers shop across two or more seafood segments while in store.” Nielsen reported that while many Australians eat seafood, there is an opportunity to encourage more consumption with food innovation that caters to consumers evolving needs and tastes. Such innovation could come from within the frozen seafood category with frozen sales increasing 1.8% in the 12 months ending 25 March 2017.

The segment has attracted an additional 519,000 households in the past year with sales increases driven by innovation and new products in the freezer – especially calamari and uncooked prawns. The company also reported improved convenience, more choice and catering to ethnic groups which enjoy seafood were also areas that could be explored by food producers, such as “offering healthy and convenient seafood meal options that appeal to time-poor families across the key segments; and also considering new flavour options that is consistent with a more adventurous and multicultural consumer palate.”

Consumers will be increasingly mindful of their purchases. More and more shoppers are choosing products that are sourced responsibly and are good for their bodies and the environment. Retailers that have placed health or sustainability at the core of their business from the beginning are continuing to thrive.

An increase in imports has met Australia's appetite for seafood. More than 200 species of seafood are imported into Australia, of which the most significant species are prawns, salmon and tuna.

Over half of imported fish by value are fresh, chilled or frozen, while approximately 40% arrives in cans. New Zealand is a significant source of Australia's imports of fresh and frozen fish (predominantly hoki, salmonids and shark), with South Africa, Argentina and Namibia also contributing large volumes of hake. Denmark, New Zealand and Norway are the main sources of imported farmed Salmon. Imports from China and Vietnam have increased over recent years, dominated by imports of frozen prawns, squid and octopus.

Tuna is the major canned seafood import with the majority coming from Thailand. Other major canned imports are salmon, mainly from the USA, and sardines, mainly from the UK.

The ongoing rise in disposable incomes and health consciousness, coupled with rising awareness about the health benefits of certain types of fish and seafood, particularly salmon, has been listed for the predicted increase in consumption.

Depleting fish stocks, imports, catching quotas and increasing operating costs is why the seafood industry is not expected to grow at the same rate. In 2015-16, IBISWorld forecasts industry revenue of AU$ 1.46 billion, forecast to grow by an annualised 0.9% over the coming five years to AU$ 1.5 billion in 2020-21.

3.5 Sustainability, Demand & Self-Sufficiency

In 2016–17 the gross value of Australian fishery and aquaculture production (GVP) increased by 1% to $3.06 billion and of this ocean harvest accounted for 56% ($1.74 billion). This was a decline in terms of both production volume (5%) and value and an increased catch of wild-caught **molluscs** was more than counterbalanced by a fall in both **finfish** and **crustacean** harvest.

Salmonids were the most valuable farmed species in 2016–17, and production value increased by 5 % to $756 million. Overall 2016/7 saw a 4% increase in total aquaculture GVP to $1.35 billion and production volume rose to approaching 94,000 tonnes which was a similar 4% rise.

Sustainability is defined as “the industry having the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs.”

While Western consumers increasingly value the lifestyle and nutritional attributes of seafood (taste, ease of preparation, health giving omega 3s), they are concerned for the “sustainability” aspects of seafood and fishery products, and lack confidence in their ability to choose seafood based on their own judgments. The impact across the board has been to raise both the standard of seafood offered, and the compliance procedures in fishery management production and processing to deliver that offer.

Ultimately, the status of species could influence the level of wild-catch competition present in Australia. As wild stocks are depleting this allows aquaculture to make up the loss as seen in previous global aquaculture trends.

The status of Australian fish stock in 2016 is presented in the table below.
Please refer to *ANNEX A* for the status assessment of all species.

Stock status classification summary of the stocks and proportion of the catch of all species

Stock status	Number of stocks			Total stocks	Catch ('000 t)	% of total catch of species
	Biological stock	Management unit	Jurisdiction			
Sustainable stock	85	56	34	**175**	114.84	85.41
Transitional-depleting	7	15	4	**26**	3.91	2.90
Transitional-recovering	5	4		**9**	1.29	0.96
Overfished	7	7	3	**17**	8.51	6.33
Environmentally limited		4	1	**5**	0.03	0.02
Undefined	12	17	20	**49**	5.87	4.36
Negligible	2	2	9	**13**	0.01	0.01
Total	**118**	**105**	**71**	**294**	**134.45**	**100**

Note: The total does not include international catches (that is, catch taken outside Australian waters by countries other than Australia) of the four tuna and billfish species.

Source: Fisheries Research & Development Corporation, Status of Australian Fish Stocks Reports 2016

Section 4: REGULATION

4.1 Overview

Although Australia's marine zone covers 8,148,250 square kilometres, due to a lack of nutrient-rich currents (and consequent relatively low productivity) Australia ranks only 52nd in the world in terms of volume of fish landed. The wild-catch and aquaculture industries in Australia are managed under strict guidelines. While the Australian Government has significant overview of many important functions, including biosecurity, research, environmental management, aquatic animal health, food safety, and negotiation of market access and trade, many elements of the regulation of the industry and production are the responsibility of the states and territories. Aquaculture operations, have stringent environmental and food safety controls placed upon them which are monitored and enforced on an ongoing basis by state agencies. Strict food health standards also apply to both aquaculture and wild capture production and such controls ensure fish grown in Australian waters are safe to eat and that seafood production does not unduly affect aquatic environments.

The Australian Government also applies strict food safety requirements for imported seafood. The Department of Agriculture Fisheries & Food (DAFF) inspects imported seafood, to check that it meets Australian requirements for public health and safety and complies with Australian food standards as detailed in the Australia New Zealand Food Standards Code. Importers are responsible for ensuring that all food imported into Australia complies with relevant standards in the code.
The Australian Border Force refers foods to the department for inspection. If any consignment fails inspection, the department will go back to testing 100% of that product until a history of compliance is re-established for the producer of the food.

Australia is party to a range of international conventions that seek to establish global, regional and subregional management to govern highly migratory, straddling, pelagic and demersal fish stocks. These conventions include the *Convention on the Conservation of Southern Bluefin Tuna*, the *Agreement for the Establishment of the Indian Ocean Tuna Commission*, the *Convention for the Conservation of Antarctic Marine Living Resources*, and the *Convention on the Conservation and Management of Highly Migratory Fish Stocks in the Western and Central Pacific*.

Additionally, state jurisdictions variously maintain supporting and enabling fishery / seafood legislation as necessary (e.g. for food safety and human health, or environmental protection).

State and Territory fishery legislation is subservient to national legislation, including the Commonwealth's *Environment Protection and Biodiversity Conservation Act*. The EPBC Act bears directly on Commonwealth, State and the Northern Territory fisheries management in three ways:

1. Assessing matters of national environmental significance;
2. Avoiding impact on listed threatened species, listed migratory species, cetaceans and members of listed marine species;
3. Monitoring and precluding international movement of wildlife specimens; as it relates to fisheries, the commercial export of Australian native species or species listed under the *Convention on the International Trade in Endangered Species (CITES).*

It is understood by these organisations that the problem of **Illegal, Unreported and Unregulated (IUU)** fishing is a major threat to the effective management and conservation of regional fish stocks and are consequently seeking to identify vessels engaged in IUU fishing within respective areas of competence in order to effectively combat and eliminate these operations.

Gross value of fisheries and aquaculture production, Australia

	2014-15 $'000	2015-16 $'000	2016-17 p $'000
State wild-catch fisheries			
New South Wales	89,484	91,082	89,305
Victoria	58,742	57,810	54,362
Queensland	182,209	175,897	192,909
South Australia	240,204	264,653	253,107
Western Australia	488,420	504,068	529,543
Tasmania	175,265	182,349	175,935
Northern Territory	31,071	34,894	43,860
Total	1,265,394	1,310,754	1,339,021
Aquaculture a			
New South Wales	55,756	60,232	64,610
Victoria	29,054	27,584	39,320
Queensland	114,058	117,300	116,500
South Australia	227,480	251,520	230,540
Western Australia	81,186	89,199	90,453
Tasmania	650,343	730,723	770,949
Northern Territory	24,100	24,522	34,447
Total	1,181,977	1,301,080	1,346,819
Commonwealth fisheries			
Northern Prawn	106,827	124,014	118,812
Torres Strait	25,109	24,355	18,045
SESSF Commonwealth Trawl Sector	38,357	42,913	47,096
SESSF Gillnet, Hook and Trap Sector	20,915	22,378	25,286
SESSF Great Australian Bight Trawl Sector	8,474	7,694	10,040
Eastern Tuna and Billfish – Longline and minor line	34,975	48,755	35,674
Southern Bluefin Tuna	36,807	35,875	38,544
Western Tuna and Billfish	np	np	np
Bass Strait Scallop	2,761	4,610	5,998
Southern Squid Jig	890	1,035	572
Other fisheries b	75,160	127,201	103,283
Total	350,276	438,829	403,350
Total value c	2,764,206	3,020,093	3,057,790

a Excludes the value of hatchery fishery production. b Includes entries marked np and Small Pelagics, Macquarie Island, Coral Sea, Heard and McDonald Islands, SESSF Victorian coastal waters sector, Norfolk Island, South Tasman Rise, Eastern and Western Skipjack Tuna, East Coast Deepwater Trawl, North West Slope Trawl, and Western Deepwater Trawl fisheries because of confidentiality requirements. c To avoid double counting, total value has been reduced to allow for southern bluefin tuna caught in the Commonwealth Southern Bluefin Tuna Fishery, as an input to farms in South Australia. na Not available. np Not for publication because of confidentiality requirements. Included in Other fisheries. p Preliminary. SESSF Southern and Eastern Scalefish and Shark Fishery.

Source: ABARES; Australian Fisheries Management Authority; Western Australian Department of Fisheries; Tasmanian Department of Primary Industries and Regional Development; New South Wales Department of Primary Industries; Queensland Department of Agriculture and Fisheries; Victorian Fisheries Authority; Northern Territory Department of Primary Industries and Resources; Primary Industries and Regions South Australia; South Australian Research and Development Institute.

Unsustainable aquaculture practices can degrade marine and freshwater environments. In many countries where aquaculture production has rapidly expanded, the environmental impacts of aquaculture have not always been managed to a standard equivalent to that required in Australia. Aquaculture is typically a more sustainable production method in comparison to wild-catch fishing and hence is likely to grow in order to fulfil the world's growing demand for seafood in a more sustainable manner. Many aquaculture production methods are not constrained by environmental concerns.

Biosecurity

Biosecurity refers to measures that are taken to stop the spread or introduction of harmful organisms to human, animal and plant life. The introduction of new species has the potential to dominate marine and freshwater communities, significantly impacting recreational and commercial seafood production activities.

It is estimated that there are around 250 introduced marine species in Australian waters. In 2005, the Australian Government and most states and territories signed an intergovernmental agreement to develop a national system for preventing and managing marine pest incursions. Given the growth in marine shipping in recent years, which is predicted to grow even more rapidly over the next two decades, the biosecurity risk from ballast water is expected to be on the increase.

Known pests that have hitched a ride into Australia include **Carp**, **Tilapia**, the **Striped Mussel**, **toxic algae** such as those that cause biotoxin producing bloom events and **exotic crabs** such as the **European Shore Crab**.

Diseases that have impacted the commercial aquatic sector over the last decade include the **Pacific Oyster Mortality Syndrome (POMS)** and the **Abalone Viral Ganglioneuritis (AVG)**. The farmed prawn sector has had to deal with exotic **Acute Hepatopancreatic Necrosis Disease AHPND)** and more recently **White Spot Syndrome Virus (WSSV)**, which is currently impacting Queensland's Gold Coast region. There have also been issues where it has been difficult to determine the causal factor, such as unexplained mortalities in both wild **Groupers** and in farmed **Pearl Oysters**.

4.2 Market Access and Security

To date biosecurity has not been a significant factor in access to overseas markets for seafood. It may be in the future.

The Government through Fisheries Research and Development Corporation (FRDC) and its industry and research organisation partners have spent considerable RD&E (Research, Development and Extension) investment on biosecurity in recent years and plans to continue to do so into the future.

Biosecurity

Investment in biosecurity over recent years has been considerable, with an annual expenditure of between $2m - $6m per annum. The key industries that have required RD&E investment have been in the aquaculture sector. Between 2010/11 and 2016/17 the aquaculture sector investment on biosecurity projects has totalled $28,084,304.

The bulk of these funds have been to address issues in 3 key aquaculture sectors: **Pacific Oysters**, **Prawns** and **Atlantic Salmon**. These three sectors have invested over $21m into biosecurity projects during this period. This is evident from how frequently they appear in the list of projects conducted since 2010.

The **Pacific Oyster** sector has been addressing issues regarding **Pacific Oyster Mortality Syndrome (POMS)** since 2011 with a number of projects looking to help the industry deal with the effects of this incoming disease. This work has been ongoing from 2011 – to date. Initially in NSW where it first appeared in Australia and more recently in Tasmania when it emerged in their environment.

Environmental Biosecurity

In the environmental biosecurity area, other groups have traditionally taken the lead such as OceanWatch Australia and State Government agencies. However, the Federal Government has recently announced a very large project looking to control **Carp**, as they one of the destructive introduced species in Australia. The FRDC is leading the *National Carp Control Plan* on behalf of DAWR, which was announced in May 2016. The program is now underway and the NCCP is now looking at progressing legislative approval to release the carp virus at the end of 2018.

Climate Change Biosecurity

It has been recognised that there will be changes in marine pest and diseases associated with climate change. It has been demonstrated that elevated water temperatures can act as a stressor impacting the immune responses of all cool water aquatic animals such as **Abalone**, **Atlantic Salmon** and **Pacific Oysters**, potentially increasing their susceptibility to bacterial, viral, fungal and parasitic infections. Stressors can lead to major impacts on wild harvest fisheries and aquaculture – e.g. major floodplain wetland drainage and the accompanying increase of acidic runoff led to the contraction in the range of **Sydney Rock Oyster** (Saccostrea glomerata) aquaculture in south-east Queensland and NSW estuaries, with debilitating diseases such as QX accompanying these acidic runoff events.

Other effects of Climate Change

In Australia, climate change is predicted to increase the mean temperature of air and water, cause sea-levels to rise, increase the acidity of the oceans, alter rainfall regimes, drive changes in the timing, intensity, and location of oceanic currents, and increase the frequency and intensity of including extreme rainfall events, floods and bushfires. Each of these changes is likely to have some effect on important fishery species, however the magnitude of effects remains unclear.

Sustainable imports

Australia now imports more seafood than the country produces for domestic consumption. Australia's Sustainable Seafood Guide includes assessments of the sustainability of the major imported produce available on our supermarket shelves, in restaurants and in our fish and chips.

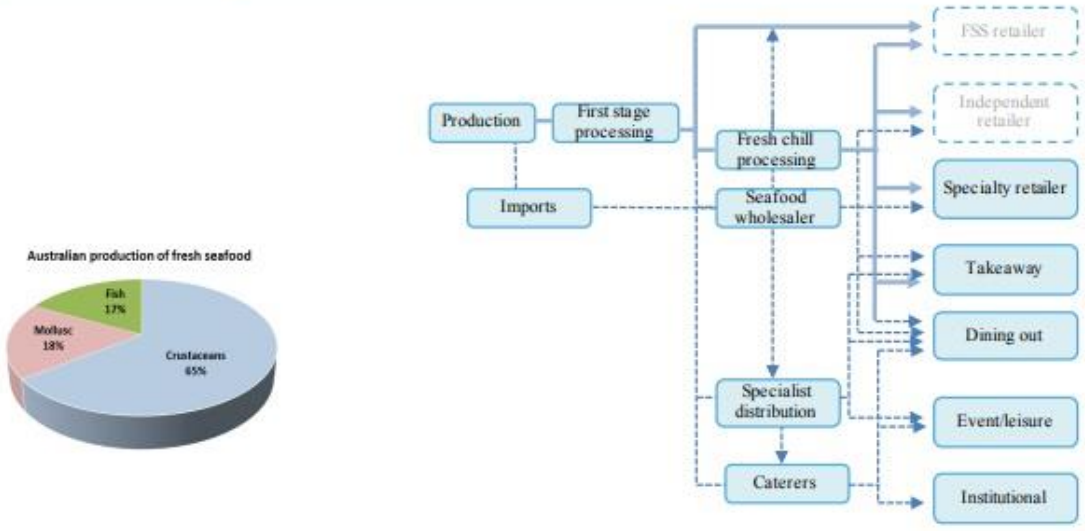
However, sourcing information on the fisheries from which much imported produce comes from can be problematic. For example, the majority of imported **squid** and **octopus** come from **China** and **Vietnam**, and finding detailed, fishery specific and accessible information is a challenge. The Sustainable Seafood Guide provides an overall assessment of the issues in some of these fisheries.

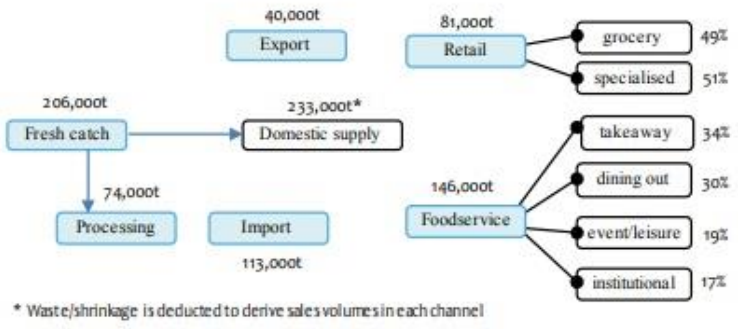
Section 5: THE SUPPLY CHAIN

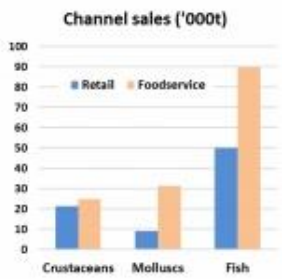
5.1 Supply Chain Overview

Category size: Fresh Seafood

Key volume drivers	• Growth in demand through takeaway segment • Overall demand across the dining out market • Consumer health concerns regarding red meat
Key value determinants	• Wholesale prices for different qualities of white fish and salmonids influenced by overall supply
Challenges faced	• Balancing supply and demand across channels with some volatility in supply • Length of the supply chain affecting product freshness in discerning market segments
Dominant players	• Specialist seafood distributors • Specialist seafood retailers (with wholesale activities)



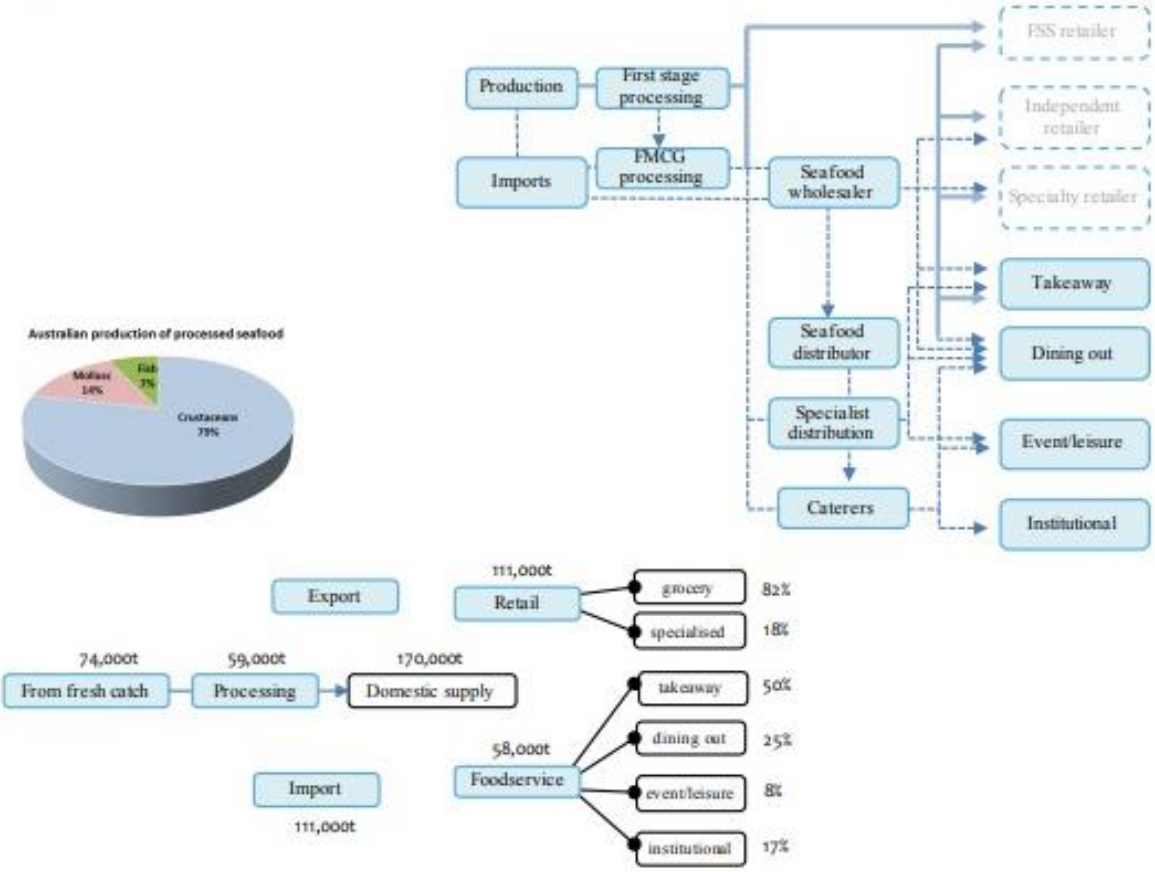




Source: Rural Industries Research & Development Corporation
Understanding Food Markets Outside Retail - December 2016

Category: Processed Seafood

Key volume drivers	• Growth in demand through takeaway segment • Overall demand across the low-value of the dining out market • Budgetary scope within institutional channels • Consumer health concerns regarding red meat
Key value determinants	• Benchmark value of imported lines
Challenges faced	• Remaining price competitive with imported products
Dominant players	• Major Fast-Moving Consumer Goods (FMCG) processors • General distributors • Specialist seafood distributors

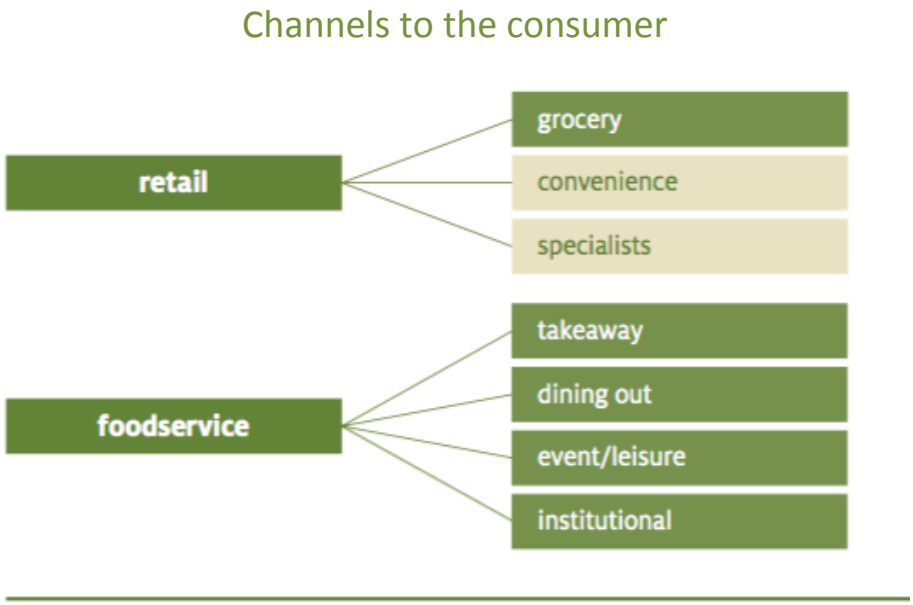


Source: Rural Industries Research & Development Corporation
Understanding Food Markets Outside Retail - December 2016

The Australian retail industry continues to experience substantial volatility. Significant and almost universal lifestyle changes reflecting an increasingly diverse demographic mix and an aging population have compelled both the retail industry and the associated distribution sector to re-appraise their business models and to develop new strategies. The major retailers continue to seek reduced costs and efficiencies of supply chain management through ongoing rationalisation and integration. Market information, particularly outside the mainstream grocery arena is often fragmented, unavailable and difficult to access. That means that threats are misunderstood or ignored, and opportunities are missed.

Although manufacturers and retailers are aware that they have the resources, means and ability to direct and 'educate' consumer trends and choice, their ability to shift and manage attitudes is limited and many of the retail 'initiatives' are grass-root driven. A discontinuation of supply of single use plastic bags by the supermarkets as an unlegislated initiative (despite the NSW government's intransigent refusal to legislate an outright ban) is a recent example. An increasing public social conscience is growing and there is a groundswell of demand for products that address issues such as waste management, sustainability, ethical production and environment. Attending to, anticipating and satisfying these different and changing consumer needs is still critical.

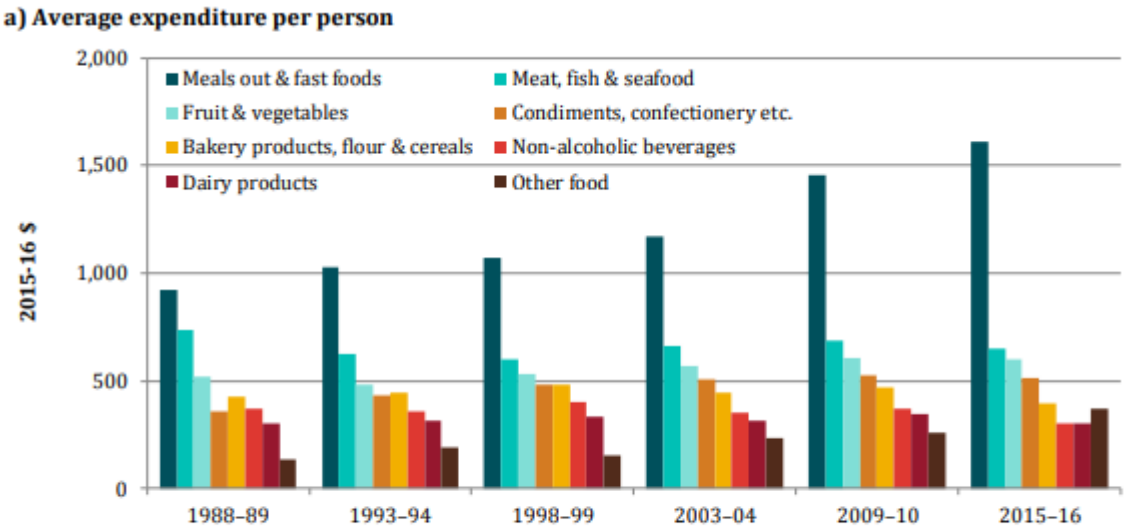
In concert with these changes is a growing interest in healthy eating, substituting red meat for chicken and seafood, and cooking food at home; probably stimulated by a plethora of TV cooking competition shows that are inevitably linked to product placement and promotion by the major supermarket groups. The internet has had a deep influence allowing online research, browsing and ordering of hitherto unobtainable, unknown or difficult to source ingredients.



The Australian food and beverage, grocery and fresh produce sectors employ 320,300 people representing over 33% of Australian manufacturing jobs with a turnover of some $172 billion.

The market falls into two broad segments: retail and foodservice. The 'grocery' segment accounts for the greater part of the overall market (67%) and consists of a small number of dominant major chain groups and a smaller number of independent grocery stores which account, collectively, for less than 10% of the overall market, although within this group may be found some high-value speciality stores.

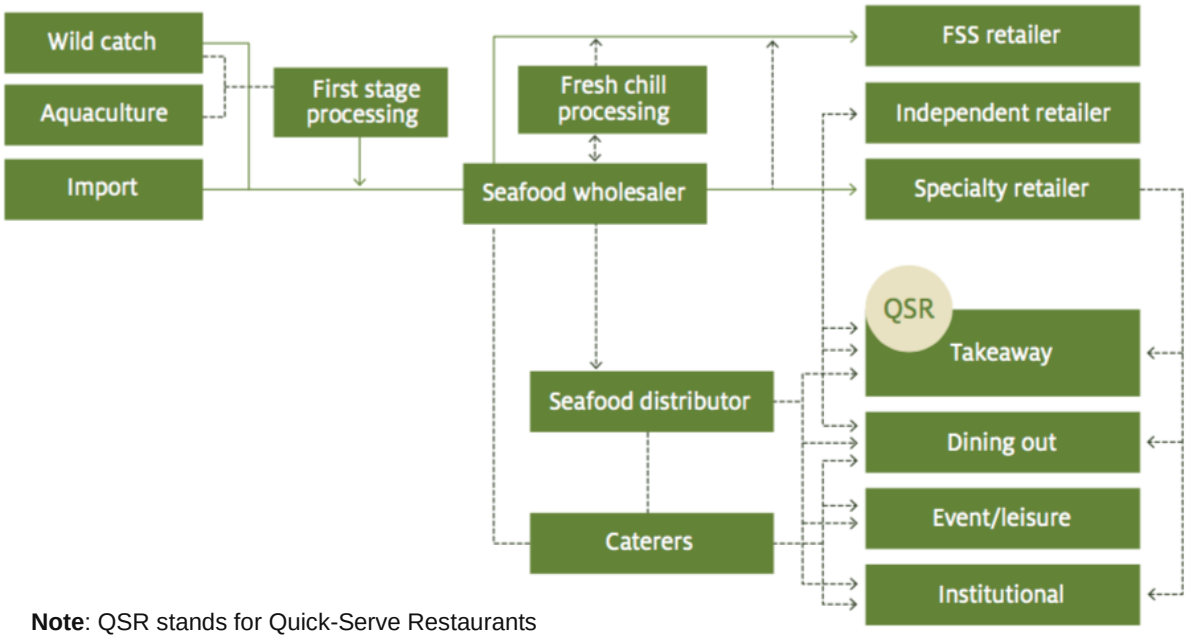
Shares of household spending in the year to June 2016



Note: Values are in 2015-16 prices; CPI-adjusted data. Food includes non-alcoholic beverages; fruit includes nuts; dairy products includes milk; condiments, confectionary etc. includes food additives and prepared meals.

Sources: ABS 2017a,b

Fresh seafood product channels to the consumer



Note: QSR stands for Quick-Serve Restaurants

Source: Freshlogic & Department of Agriculture, Fisheries and Forestry FOODmap: An analysis of the Australian food supply chain, July 2012; Source: Rural Industries Research & Development Corporation: Understanding Food Markets Outside Retail – December 2016

5.2 Supply to the Trade

The International food trade influences many domestic food supply chains. Imported products are often used to fill temporary or structural local supply gaps and seasonal shortages. Seafood is no exception to this dynamic. Domestic buyers are in direct competition with international exporters and import buyers and, accordingly, have a strong influence. Australian food processors rely upon a mixture of local and imported ingredients, which can result in a complex mix of ingredients.

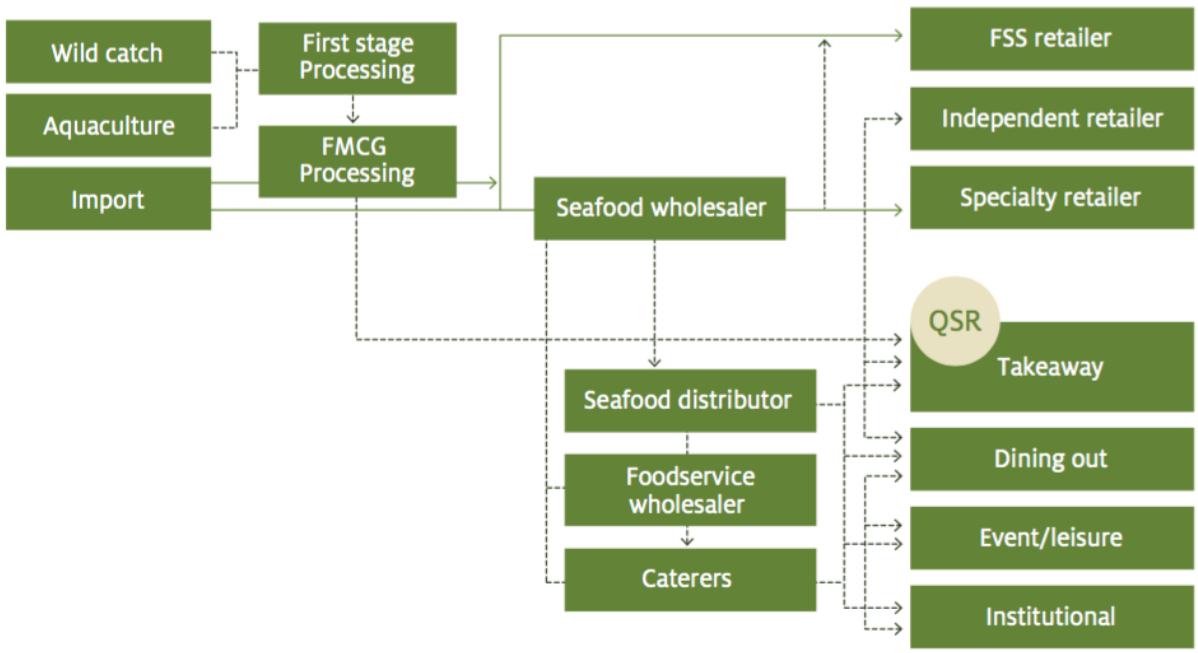
Australia has developed a large export food trade surplus which fluctuates depending upon the international market price. This price is hostage not just to international scarcity but also to fluctuations in an often quite volatile exchange rate. A high proportion (over an average of 31%) of exports are shipped unprocessed – either in live form or in fresh/chilled form (e.g. seafood and horticulture) or as bulk raw exports (e.g. grain). Much of the growth in food imports has been in processed foods.

Imports – Processed Seafood

Overall, the local seafood industry is highly reliant on frozen processed imported product and this commodity meets a large proportion of Australia's domestic needs.

A significant quantity of seafood is sold in processed form (canned or in frozen meal portions), adding to the large volumes of imported frozen product which are sold as fresh fish. The overriding driver of demand for processed seafood is the balance of supply and demand in the chain and the price gained from wild-catch product combined with an increased demand for portion-prepared products.

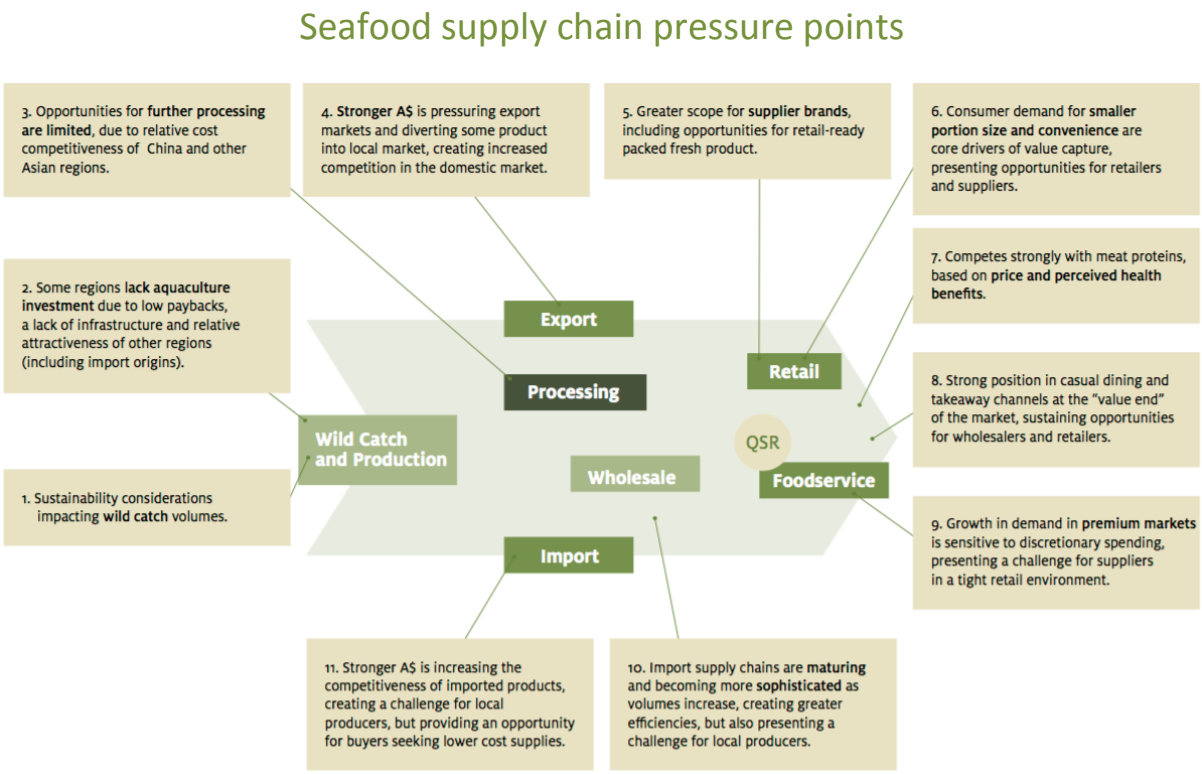
Processed seafood product channels to the consumer



Source: Freshlogic & Department of Agriculture, Fisheries and Forestry FOODmap: An analysis of the Australian food supply chain, July 2012

5.3 Supply Channels to the Consumer

The 'fresh' category includes both fresh and frozen offerings.



Robust supply chains are central to the success of agricultural industries in an increasingly competitive global market. The key is to create, or re-create, contestable supply chain organisations aligned with the producer in three possible ways:

1. For chains dominated by large corporate players it is critical to raise alignment and trust along the supply chain, particularly with respect to encouraging investment.
2. Chains that are concentrated, characteristically cooperative structures with large players, need to keep working to reduce capital constraints.
3. Smaller industries (such as seafood) with relatively fragmented structures often lack an industry leader that drives innovation. Besides further consolidation, this calls for greater cooperation among players.

Deep and sustained involvement by industry bodies could help drive this. The Port Jackson Partners' report also highlighted the critical need for additional investment infrastructure to support the growing Australian seafood industry. This includes road infrastructure, rail infrastructure and port infrastructure.

The Seafood Wholesaling Industry in Australia (SFWI) is a sub-segment of the broader Food Wholesaling Industry (FWI) relating to the supply and distribution of fresh and frozen seafood products. Due to limited seafood resources and processing constraints within the domestic Australian market, the SFWI is reliant on imported fresh and frozen seafood products.

The SFWI is currently undergoing structural change driven by large supermarket chains stocking high quality, fresh pre-packed seafood products in response to consumer demand for healthier seafood products and convenience.
The major supermarkets (**Woolworths**, **Coles**, **IGA**) source their domestic seafood products directly from larger fishing and aquaculture producers. Major retailers and wholesalers have shown an increasing interest in issues such a sustainable sourcing, traceability and certification, with the retailers establishing proprietary through-chain accreditation systems. The distribution channel structures for fresh and frozen seafood are complex and multi-layered due to diversity of species, catch and geographic source. Seafood catch either flows direct to wholesalers or may pass through an early stage cleaning process, the fragmented supply is from diverse sources across a large number of species. Airfreight dominates our seafood exports. An important advantage of airfreight is that food can be transported directly to inland destinations in overseas markets. This direct and prompt accessibility is very important in a scenario where inland 2nd tier cities and supermarkets in China are becoming increasingly important market destinations.

Potential importers need to be aware of the total costs of the import process. Starting from the beginning the following elements are components of and must be factored into the total import costs:

- A purchase or manufacturing cost
- A cost of delivery to the warehouse at the shipping port
- Handling at the shipping port
- Any export customs duty
- Documentation charges and other on the shipper side
- Maritime (or airfreight) Cost, Insurance, Freight
- Documentation charge
- Import customs clearance
- Delivery to the consignee’s warehouse.

Other costs could include:

- Any import duty
- An import GST (Goods & Services Tax)
- Costs of dispatching to interstate warehouse
- Costs of storage (renting a warehouse)
- Costs of marketing, including advertising
- Sales costs
- A cost of the final delivery

These are all costs which can compromise an importer’s road to success. On what this success will depend on? Mainly on whether costs are estimated correctly.

The distribution channel structures for fresh seafood are highly complex and often lengthy due to the diversity of species (of fish, crustaceans and molluscs), the diversity of catch and geographic production sources, the different requirements for early-stage cold-chain handling, and a wide range of market outlets for fresh seafood products.

The fresh catch emanates from diverse sources and cuts across a large number of differing species. It can flow direct to wholesalers or can pass through early-stage ‘clean and gut’ processing. In the case of crustaceans first-stage processing involves cooking upon catch (either at port of landing or on-vessel prior to arrival at port).

Wholesalers form an important conduit for remote catch to reach major markets, and this includes the sourcing of imports of fresh and frozen fish and fillets. There is little retail concentration in the fresh seafood market. About 17% of domestic, fresh seafood sales volumes are made in supermarkets, while around 40% of sales are through independent fishmongers (the largest volume channel). Takeaway seafood outlets and dining venues account for the remainder of the sales volumes. Distribution flow into the diverse retail and end-use markets is done by seafood wholesalers and specialist distributors.

Source: Freshlogic & Department of Agriculture, Fisheries and Forestry FOODmap: An analysis of the Australian food supply chain, July 2012

5.4 The Supermarket and Specialty Retail Channel

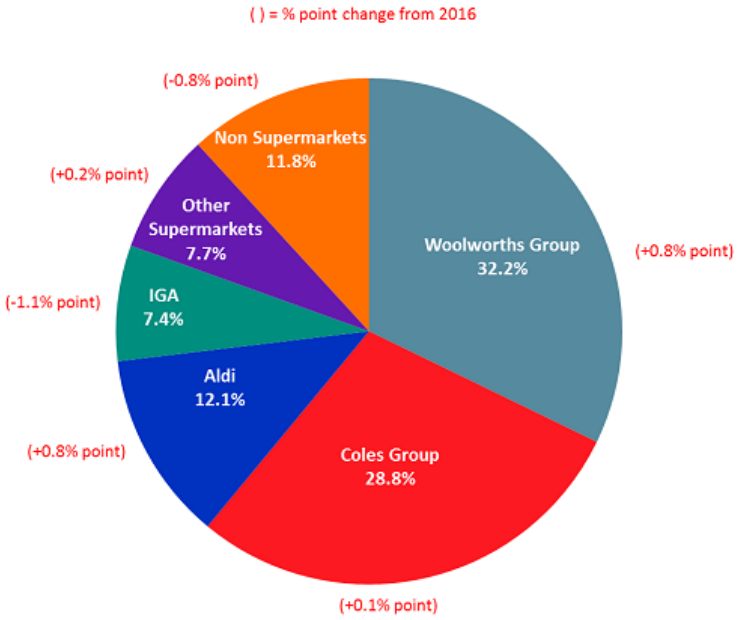
This channel has a dominant market share of the retail sales across most retail food and beverages categories. Major chain retailers (which really means **Woolworths**, **Coles** and **Aldi** have large national store networks covering all inner city, suburban and regional centres. Smaller chains or independent banner groups (such as **IGA**) have a less comprehensive coverage of the market.

A key feature of the channel structure is the means by which direct supply logistics are managed by the retailers on national or regional bases, through national or regional distribution centres. Products supplied through each of these centres will depend upon their nature and the availability of or dependence on regional supply sources.
Regional distribution centres will tend to be used for fresh product lines, whereas dry groceries (for example) are more likely to be supplied to a national distribution centre. In some cases, supplier or franchised direct-store delivery services will service certain parts of the retailer networks, especially those in regional centres.

The Domestic Grocery Market – Major Players

The two major players are, and have been for decades, **Coles** and **Woolworths**. The German **ALDI** group which arrived in Australia in 2001 is growing rapidly and capturing market share from both **Coles** and **Woolworth**, but more significantly at the expense of the Independent Grocery Alliance (**IGA**), a confederation of independent generally smaller ‘mum and dad’ supermarkets supplied by the South African Metcash wholesaler.

Australia: Share of grocery market 2016/7



Source: Roy Morgan research

Independent food retailers

Independent grocery and convenience stores command a minor share of retail sales throughout most segments and generally offer a limited range of foods and beverages with a focus on convenience for passing traffic. A lot of these 'C' stores are located within petrol stations and on suburban strips or village shopping centres.

Chains or banner groups of independent and convenience stores (known in Australia as the 'route' (pronounced 'rout') trade are serviced by regional distribution centres. They are focussed upon convenience which is often secondary to health considerations particularly when (as they often are) co-located with service stations offering discounted fuel and price points of major volume lines reflect more convenience value than competitive pricing.

Speciality retail

This channel encompasses a range of specialist food retailers that focus on fresh produce, meat or otherwise single or a limited number of food categories (such as delicatessen). A good example of this type of outlet is the **Harris Farm** chain which offers generally upmarket fresh and dry groceries, meat, delicatessen, cheese and an excellent selection of fresh seafood.

Such outlets are typically independently owned and, accordingly, are not able to avail themselves of group buying or distribution arrangements. They are therefore serviced by a number of specialist fresh-product wholesalers and distributors, attending to the frequency, cold-chain and specification requirements of such retailers. Independent retailers command a dominant portion in the seafood market, and significant portions of the retail market shares in fruit and vegetable, bread / bakery and red meat categories.

Supermarket fortunes

Since the sale and closure of its underperforming hardware businesses in 2016, **Woolworths** has refocused on its Australian food division and the company has cut prices to better compete with **Coles** and **ALDI**. Australians like cheap, and everything else seems subservient to delivering the lower prices the average Australian consumer demands.

Woolworths' average prices declined by 2.1% in 2016-17. This trend has carried on at the start of 2017-18, with average prices declining by 2.4% in Q1 2017-18. **Woolworths** is also investing heavily in its customer service, and upgrading and refurbishing old stores to further boost demand. In concert with the ferocious price war being fought between **Coles** and **Woolworths** along the main battle line of ever lower prices, **Woolworths** also carries the strap line 'the fresh food people'.

According to said Mr Nathan Cloutman, IBISWorld Senior Industry Analyst, as a result of the resurgence of **Woolworths**' supermarket business, the company gained market share for the first time in several years in 2016-17. This trend is expected to continue in 2017-18, with the company projected to account for 37.2% of the industry by the end of 2017-18.

Coles' performance in 2016-17 was one of its weakest in several years, with the company facing pressure from a more buoyant **Woolworths** and an expanding **ALDI**. These pressures have continued into 2017-18, with **Coles** recording sales growth of only 0.3% for Q1 2017-18. IBISWorld anticipates the company's half-year result will be similar, with **Coles** (through their parent company Westfarmers) seeing the failure of its UK-based **Bunnings** venture and its **Target** chain retail stores. **Coles**' market share is expected reach 30.3% at the end of 2017-18.

ALDI is continuing to expand its store network in Western Australia and South Australia, while upgrading its stores along the eastern seaboard to include a larger range of fresh food items. **ALDI** now has over 500 stores across Australia, and its ongoing expansion is expected to have earned the company well over 12% of the supermarkets and grocery stores industry by the end of 2017-18.

Individual operators that operate under the **Metcash** network of stores, such as **IGA**, are continuing to suffer as **Woolworths**, **Coles** and **ALDI** compete strongly on price. The price war between **Woolworths** and **Coles**, and the expansion of **ALDI** are putting pressure on smaller retailers. **Metcash**'s half year result for 2017-18 has already seen **IGA** supermarket sales fall by 0.8%, and **Metcash**'s struggles are expected to continue over the financial year. **Metcash**'s market share is expected to total 7.4% by the end of 2017-18.

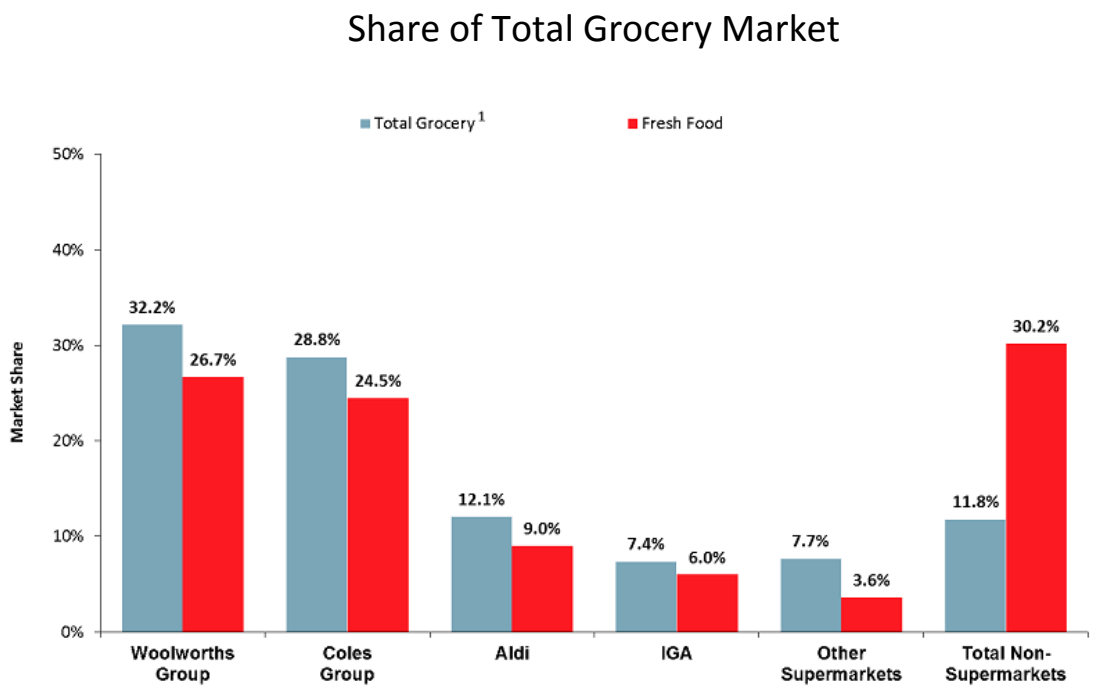
New challenges

Although **Amazon** entered the Australian market in December 2017, the US ecommerce giant is yet to launch its AmazonFresh brand in Australia. However, the threat of AmazonFresh is making online sales increasingly important in the supermarkets and grocery stores industry. Revenue in the online grocery sales industry is forecast to grow at an annualised 12.4% over the next five years. However, IBISWorld found that despite growing strongly, online grocery sales are only expected to represent a small share of total grocery sales, at 3.0% in 2017-18.

Woolworths and **Coles** are constantly improving their online sales channels by expanding their 'click and collect' options and investing in consumer data analytics. In addition, **Coles** has recently launched a 12-month trial with **Airtasker** in Sydney, which allows consumers to get their groceries delivered through the **Airtasker** app.

Another threat for the major players is **David Jones**' announcement that it will launch a standalone food store in South Yarra, Melbourne, in 2019. The company plans to invest at least $100 million over the next five years to help build a retail food business. The food stores are expected to be stocked with private-label products and offer gourmet groceries, liquor and premium convenience foods.

Non-supermarket food retailers such as butchers, fruit shops, markets, and convenience stores currently have 11.8% market share, but are showing some weakness over the last year, being down by a combined 0.8% points.

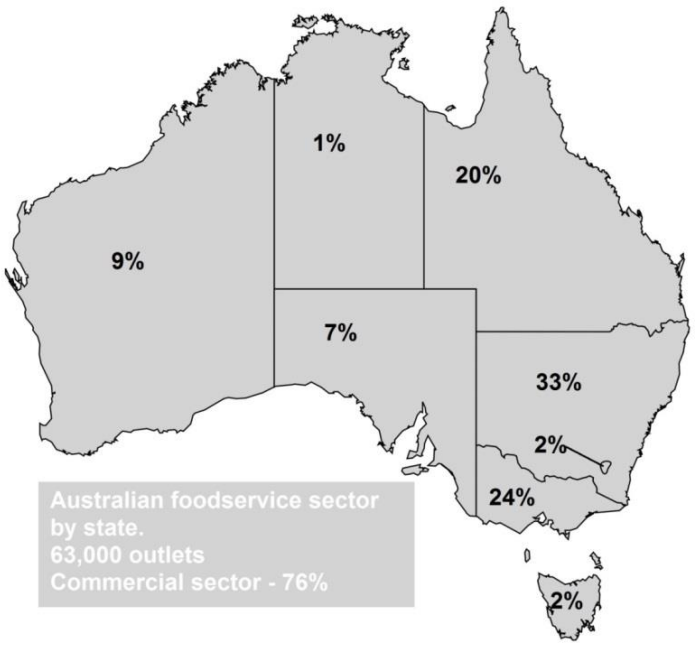


Source: Roy Morgan research

5.5 Foodservice

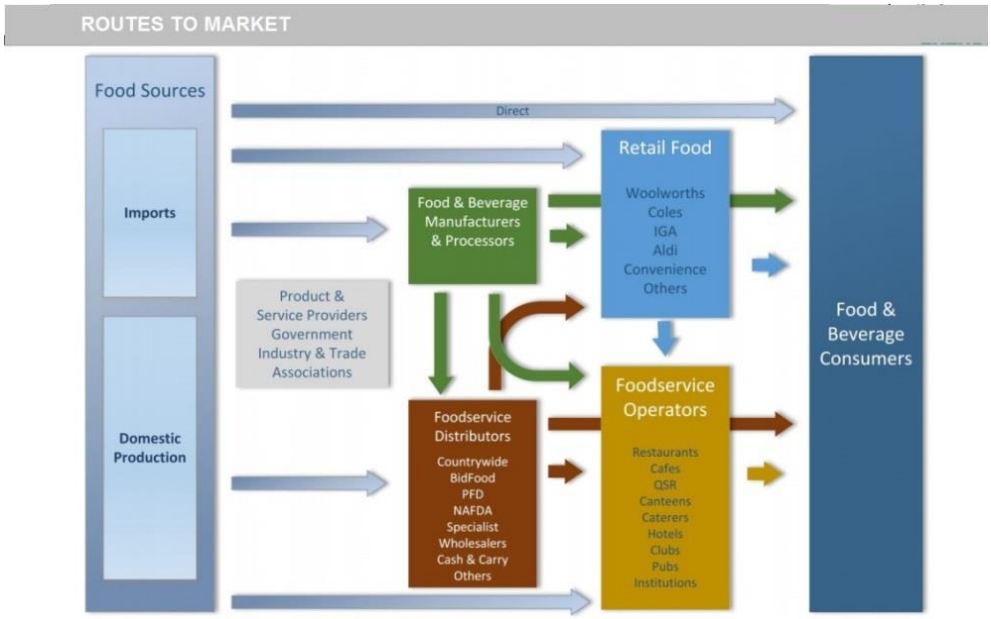
Changing household food expenditure patterns

Based on ABS Household Expenditure Survey (HES) data, the trend away from home cooking toward meals out and fast foods has continued in recent years.



Focus on foodservice

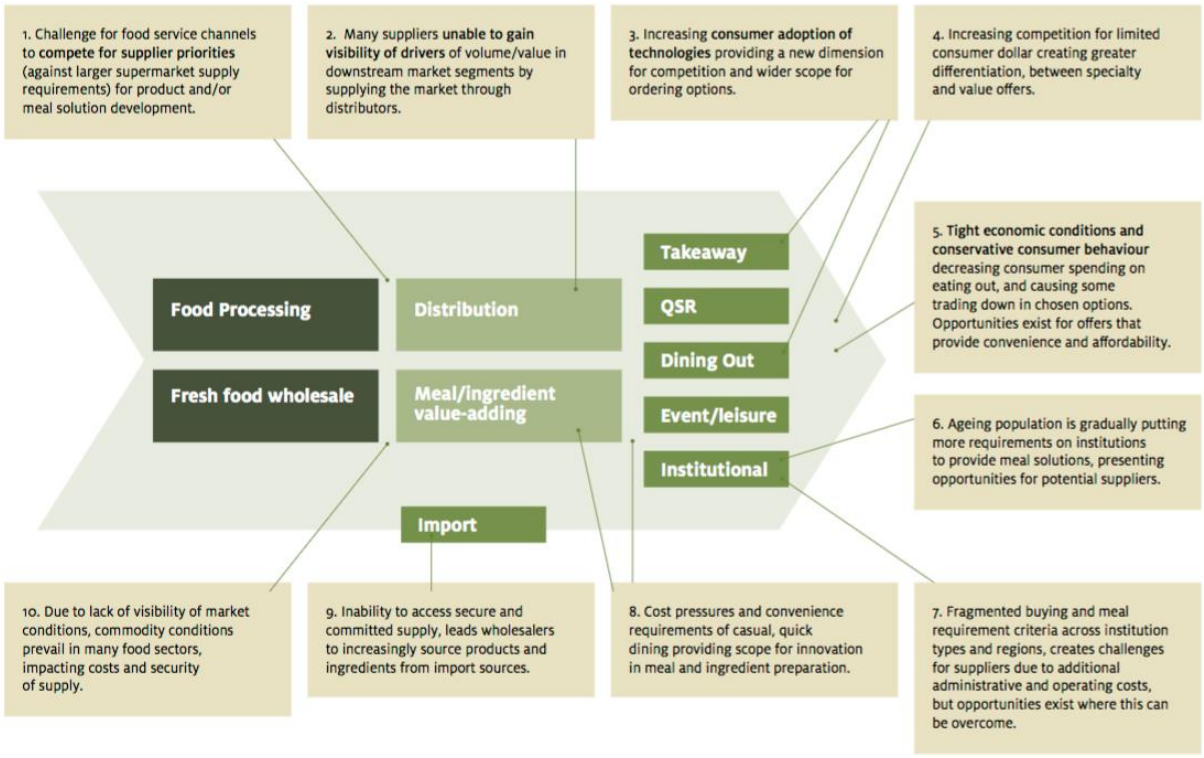
The foodservice market remains a substantial segment of the retail food market. Freshlogic's estimate of the share of volumes sold into foodservice channels of major food categories, drawn from the THRUchain™ analysis of household spending indicates that eating out represented about 27% of total household food spending. However, this excludes food produced and consumed in the institutional channels of foodservice. Other food categories, including processed food products and ingredients, are sold into the foodservice segment but are not so readily measured because of the complexity of the supply chains involved. Common pressure points faced by foodservice supply chains are identified below.



Source: Food Industry Foresight

The share of meals outside home and fast foods in total food expenditure increased from 25% in 1988-89 to 31% in 2009-10 and 34% in 2015-16, the latest year available. The 'foodservice' segment consists of takeaway food, cafés and restaurants, and represented 33% of the total market spend. The actual market for food consumed outside the home is likely to be larger than these statistics suggest because of the role played by supermarkets and specialty in supplying food and beverages to direct to consumers and to takeaway and other 'eating-out' outlets. The foodservice market anticipated to record an average of 5.1% compound annual growth rate from 2018-2023 and reinforces the fact that eating out is a way of life for many Australians who eat out on average two to three times a week.

Food service sector pressure points



Source: Freshlogic & Department of Agriculture, Fisheries and Forestry FOODmap: An analysis of the Australian food supply chain, July 2012; Roy Morgan research; ABARES (Australian Bureau of Agricultural and Resource Economics and Sciences) Food demand in Australia: trends and issues 2018; Australian Government Department of Agriculture and Water Resources.

The growing concern with obesity and other health issues such as food allergies and sensitivities has created opportunities for restaurants that can deliver fresh, natural food solutions.

A recent report from Morgan Stanley reveals an expected growth of nearly AU$ 2.4 billion by 2025 in the food delivery service industry. Busy lifestyles and schedules are a driving force behind this rapid growth.

The Catering Services industry has modestly grown over the past five years. Industry revenue is expected to rise at an annualised 1.0% over the five years through 2018-19, to be worth $7.8 billion. Businesses have been increasingly outsourcing their catering requirements, driving growth. Outsourcing enables companies to focus on their core operations and allow experts with established supply chains to undertake catering. Steadily increasing demand from airlines, government departments and households has also supported industry growth. Revenue is forecast to rise by 1.0% in the current year, reflecting rising discretionary incomes.

The Master Fish Merchants' Association of Australia (MFMA)
MFMA is a not-for-profit organisation that represents businesses that buy and sell seafood products. Membership is open to seafood retailers, wholesalers, processors, co-operatives, mobile vendors and any other organisation considered by the Management Committee to have an interest in the selling of seafood. The MFMA is administered by a Management Committee of seven financial members elected annually by popular vote, overseen by the NSW State Electoral Commission.

The Association's role as the peak industry body for the post harvest sector of the seafood industry is to represent the interests of seafood traders in the following areas:

- Commonwealth Government, State Government, local councils, industry bodies, media and the public;
- Developing industry communication strategies with newsletters and press releases etc;
- Developing marketing material to increase seafood consumption as well as raising the public's perception of the seafood industry;
- Promoting and developing strategies for working towards an economical and environmentally sustainable industry; and
- Assisting seafood merchants with day to day operational issues on the Sydney Fish Market auction floor.

Sydney Fish Market
Address: Corner Pyrmont Bridge Road & Bank Street, Pyrmont NSW 2009
PO Box 247 Pyrmont NSW 2009
Tel: +61 2 9552 1611 | Mob: +61 421 017 802 | Fax: +61 2 9552 3171
Email: michael@mfma.com.au
Website: https://www.mfma.com.au

Section 6: LEGISLATION & LABELLING

6.1 Importing into Australia

About the Australian Border Force (ABF)

On 1 July 2015, the functions of the Department of Immigration and Border Protection and the Australian Customs and Border Protection Service were integrated into a new Department – the Department of Home Affairs.
The Australian Border Force reflects a greater focus on the entire Australian border, in all its manifestations, as a strategic national asset. The integrated arrangements build on recent border protection reforms and the long history of the two organisations working closely together.

The Australian Border Force brought together all existing operational border, investigations, compliance, detention (facilities and centres) and enforcement functions. Policy, regulatory and corporate support for the ABF are delivered by the Department.

The new organisation has significant service and enforcement functions, including:

- Facilitating the lawful passage of people and goods;
- Investigations, compliance and enforcement in relation to illicit goods and immigration malpractice; and
- Onshore detention, removals and support to regional processing arrangements.

The border is considered to be not to be a purely physical barrier separating nation states, but a complex continuum stretching offshore and onshore, including the overseas, maritime, physical border and domestic dimensions of the border.

Importing

To ensure the import process is successful, an importer needs to be aware of government regulations, including clearance by the Department of Immigration and Border Protection (DIBP) and duty taxes.

There is no requirement for importers (companies or individuals) to hold an import licence to import goods into Australia. However, depending on the nature of the goods and regardless of value, importers might need to obtain permits to clear certain imported goods from customs control. Importers are required, amongst other things, to ensure that imported goods are correctly labelled. For example, imported goods that require a trade description must be marked with the name of the country in which the goods were made or produced, and where specified, a true description of the goods.

Whilst there is no general licence required for importing, Australian Customs will need to clear goods on import.
A potential importer will need to know need to know:

- What import permits, quarantine permits and treatments apply to your specific category and type of imported goods;
- Whether they are subject to mandatory safety or information standards;
- If the correct steps and regulations are not followed, there is risk breaking the law and suffering penalties, delay or confiscation of goods.

6.2 Australian Customs – and other legislative requirements for imports

All goods imported into Australia must be cleared through the border. Depending on the type and value of the goods or products you import, there may be costs involved. These can include clearance fees, customs duty, Goods and Services Tax (GST) and other taxes. Some goods may carry special restrictions or may even be prohibited from being imported. If your goods also fall under quarantine regulations, the Department of Agriculture and Water Resources will need to inspect and possibly treat them.

The Australian Government controls the import of certain goods into Australia. The controls include a restriction referred as restricted import, where you need to have written permission in order to import the goods.
Fish and tooth-fish are treated as a restricted import - but with substantial import of seafood already occurring it follows that this permission is obtainable if all the correct procedures are met and permissions obtained.

As with all countries, it is not practical to inspect every imported food item. What food is inspected and how often it is inspected is based on risk assessments and information gathered on different foods.

There are three classifications for foods coming into Australia:

1. **Risk food** - After conducting a risk assessment, FSANZ provides advice to DAFF on which foods may pose a high or medium risk to public health. These are known as risk foods, which are inspected and tested against a pre-determined list of potential hazards including microbial and chemical hazards.
2. **Surveillance food** - All other foods that are not risk foods are in this category as they pose a low risk to public health and safety. Foods in this category are normally inspected at a lower rate than risk-categorised food. However, this inspection rate is increased if a surveillance food fails inspection.
3. **Compliance agreement food** - Food importers are able to enter into a Food Import Compliance Agreement with DAFF. This arrangement offers food importers an alternative to inspection and testing of their products at the border. The agreement is an assurance based regulatory arrangement undertaken through formal recognition and audit of and importer's food safety management system by DAFF.

BICON

Website: https://bicon.agriculture.gov.au/BiconWeb4.0
All imported food must comply with Australia's biosecurity import conditions. Importers should check with the **Biosecurity Import Conditions system (BICON)** to determine if the food you intend to import requires an import permit or a treatment or if it must meet any other conditions. BICON is easy to navigate and contains useful and readily understandable advice and permits submission of enquiries and questions. BICON houses the Australian Government's Biosecurity import conditions database for more than 20,000 plants, animals, minerals and biological products. It will help you to determine what import conditions exist and if an import permit is required. All biosecurity requirements must be met before Imported Food Inspection Scheme requirements apply.

Fish of the following families for human consumption are classified as **risk food**:

- Scombridae (for example, tuna, mackerel and bonito);
- Coryphaenidae (for example, mahi-mahi);
- Pomatomidae (for example, bluefish);
- Carangidae (for example, trevallies, jacks and pompanos);
- Clupeidae (for example, herrings, sardines);
- Engraulidae (for example, anchovy);
- Scomberesocidae (for example, king gars and saury);

Fish products containing more than 300 g/kg (30%) of all or any of the fish named above are also classified as **risk food**. The fish may be whole, fillets or in portions.

Protective Tariff

Mostly basic food products are free of protective tariff but 'elaborately transformed' foods including most that have undergone some form of manufacturing process are liable for Goods & Services Tax (GST). But you should be aware that there are other factors that need to be considered.

Excise duty

Excise duty is a tax on certain types of goods imported, produced or manufactured in Australia. These excisable goods are, chiefly alcohol or most types excluding wine (which has a separate tax regime), petroleum products of all types and tobacco in all its manifestations. **Under most conceivable circumstances excise duty has no bearing upon the seafood industry**.

Australian quarantine & Inspection (DAFF BIOSECURITY)

Website: www.daff.gov.au/biosecurity
Australian quarantine & Inspection comes under the aegis of the Department of Agriculture, Fisheries & Forestry (DAFF), managed by DAFF Biosecurity.

DAFF manages quarantine controls at Australia's borders to minimise the risk of exotic pests and diseases entering the country. DAFF also provides import and export inspection and certification to help retain Australia's highly favourable animal, plant and human health status and wide access to overseas export markets.

Quarantine in Australia

With more than 60,000 kilometres of coastline offering a variety of pathways for exotic pests and diseases, DAFF screens, inspects and clears the millions of people, mail parcels, baggage, ships, animals, plants and cargo containers entering Australia every year using X–ray machines, surveillance, and, of course, the instantly recognisable detector dogs.

DAFF Biosecurity decides whether a product may be imported into Australia based on Food Standards Australia New Zealand (FSANZ) regulations and can be authoritarian and their rulings can appear to the uninitiated to be inconsistent.

It is essential that imported products comply exactly with regulations and are accompanied by correct import paperwork. This may be downloaded from the biosecurity website. **BICON is DAFF's import conditions database**. It contains the Australian import conditions for more than 20,000 plant, animal, microbial, mineral and human products.

Importers wishing to clear their own goods should contact the Department of Immigration and Border Protection (DIBP) Information and Support Centre for advice on Customs requirements and operating hours. However, it is important to stress that the DIBP Service does not complete customs import entries on behalf of importers.

Import entry procedures are based on self-assessment by importers who should be aware of all their obligations: penalties may be imposed for the submission of incorrect or misleading information or for the omission of information to mislead. Details of the information requirements of the "Entry for Home Consumption" and guidance for its completion are contained in the Documentary Import Declaration Comprehensive Guide. www.border.gov.au

Therefore, while it is not a requirement, it is recommended that importers use the services of a customs broker to complete customs import entries and related clearance formalities.

Brokers specialise in the clearance of imported goods and are licensed by Customs. The Customs Brokers and Forwarders Council of Australia Inc (CBFCA) has a prominent role representing members' interests to the Australian Customs and Border Protection Service (Customs and Border Protection).
For a comprehensive list of brokers: http://www.enterprisesearch.com.au/search-engine-subcategory/subcategory/Customs%20Brokers/

Customs Value – Import of goods

Determination of the Customs Value is a fairly complicated process and the assistance of a Customs Broker is strongly advocated.

The Customs Value (CVAL) is the value of the goods on which duty will be charged. Generally, the value used is the free on board value of the goods, which is the value of the goods excluding overseas transport and insurance.
Depending on the invoice terms other charges may be included and excluded from the goods value to determine the Customs Value. *Part VIII, Division 2 of the Customs Act 1901* should be consulted when determining what elements are to be included or excluded in the Customs Value of imported goods. Much of the information required to determine the Customs Value is obtained from the invoice for the goods.

Data provided in the import declaration is used to derive the Customs Value. A valuation factor is derived to aid in the calculation of the Customs Value for each line of the import declaration. The Customs Value is only determined for nature 10 and 20 import declarations. The importer provides the Customs Value for nature 30 declarations. Currencies will need to be converted to standard units of measure prior to the calculation

When making business decisions about future imports, the Tariff Advice service provided by Customs may be of assistance. This service provides a classification advice free of charge. However, it must be noted that this service is designed for intended imports of new goods to allow business decisions to be made. It is not designed to deliver real-time advice. The service standard for the provision of advice under normal circumstances is 30 days and it can take longer at times of heavy demand. Advice is given only on specific goods from a specific manufacturer and once an advice is given, it must be followed.

The Australian Business Number (ABN)

If importers have an Australian Business Number, they will need to supply it to Customs when formally entering goods. In the overwhelming majority of cases a local company will hold an ABN.
Importers need to be registered for Goods & Services Tax (GST) purposes and have an ABN in order to claim input tax credits or access the GST deferral scheme. This generally means that an importer needs to have a company registered in Australia or have an Australian partner or customer who is so registered. If importers do not have an ABN they will be charged Australian Goods & Services Tax at the standard rate of 10% at the time and point of import on the total landed value of the goods.
Goods and Services Tax is explained in detail hereunder.

Process

Goods entering Australia must be cleared by the Australian Customs Service. Depending on the type and value of the goods or products, there may be costs involved, including clearance fees, customs duty, Goods and Services Tax and other taxes. The Australian Customs Service website (www.customs.gov.au) provides general advice on clearance requirements.

Quarantine

Designated products must be inspected and, where appropriate, treated by the Australian Quarantine and Inspection Service (AQIS (DAFF biosecurity) for pests or diseases. Some products have been assessed as posing significant risk and are not allowed to enter Australia. Other products are only allowed into Australia on the granting of an import permit.

Labelling

Website: www.foodstandards.gov.au/industry/labelling/Pages/default.aspx
The *Australian Trade Practices Act* prohibits the making of certain false and misleading representations, including on labels. In some circumstances, the law requires that labels provide certain specific information to consumers.
The Act also prohibits businesses from making false or misleading claims about the place of origin of goods.

The Australian Competition and Consumer Commission (ACCC) country of origin website outlines the basic principles on country of origin labelling and regulations governing the 'Australian Made' logo.
Some categories of goods (such as foods) are subject to separate, detailed labelling provisions.
Website: https://www.accc.gov.au/publications/country-of-origin-food-labelling

Commerce Trade Descriptions

Importers are required to ensure that goods entering the commerce of Australia are correctly labelled. The *Commerce (Trade Descriptions) Act 1905* and the *Commerce (Imports) Regulations 1940* set out the labelling requirements for goods imported into Australia. Customs administers this legislation.

It is an offence to import goods that do not bear a required trade description or bear a false trade description.

Imported goods that require a trade description must be marked with the name of the country in which the goods were made or produced, and where specified, a true description of the goods.

When a trade description is required, it must be:

- In the English language; and
- In prominent and legible characters and;
- On a principal label or brand affixed in a prominent position and in as permanent a manner as practicable and;
- If labelling on the goods includes a weight or quantity, it must also say if that weight or quantity is net or gross.

Any other information included must not contradict or obscure the required trade description. This includes illustrations, wording or size of lettering.

A false trade description can be any description of goods that is incorrect or misleading. This may include direct or indirect details of size, weight, quality, quantity, origin, manufacturer, ingredients or the application of a patent, privilege or copyright, and includes all possible alterations of a trade description, whether by way of addition, effacement, or otherwise.

A trade description may also be false if information is omitted from the description and this misleads the consumer as to the true description of the goods.

Commercial goods and samples

Business travellers carrying commercial goods or samples may need to obtain permits for their goods depending on the nature of the goods, regardless of value. Quarantine and wildlife regulations and other restrictions may also apply to certain goods.

If you import goods into Australia, you need to be aware of customs and duty, import permits, quarantine permits and treatment that apply to imported goods.

This page links to information on customs requirements, prohibited & restricted goods, quarantine requirements and further assistance for importers: http://business.gov.au/BusinessTopics/Importingandexporting/Importing

6.3 Seafood Certification and Labelling

Legislation requires all seafood sold in Australian retail outlets, both packaged and unpackaged, to be labelled with the country of origin.
This means that Australian consumers can tell the difference between domestic and imported seafood products and make informed purchases. Retailers are increasingly looking to independent third-party certification schemes to demonstrate that seafood comes from sustainable sources. By purchasing seafood products from sustainable fisheries, retailers show they are committed to community values.

While a range of schemes are available, arguably the most widely used and recognised is the Marine Stewardship Council scheme.

Australia is party to a range of conventions that establish global, regional and subregional management organisations that manage highly migratory, straddling, pelagic and demersal fish stocks. These instruments include the *Convention on the Conservation of Southern Bluefin Tuna*, which establishes the Commission for the Conservation of Southern Bluefin Tuna, the *Agreement for the Establishment of the Indian Ocean Tuna Commission*, which establishes the Indian Ocean Tuna Commission, and the *Convention for the Conservation of Antarctic Marine Living Resources*, which establishes the Commission for the Conservation of Antarctic Marine Living Resources. Australia plays an active role in these organisations.

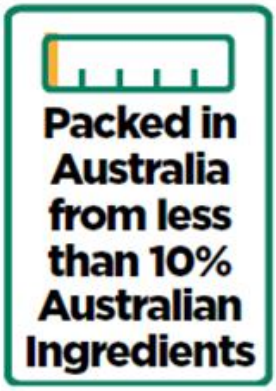
Australia has also signed the *Convention on the Conservation and Management of Highly Migratory Fish Stocks in the Western and Central Pacific*.
Many of these organisations are now focusing on the problem of Illegal, Unreported and Unregulated (IUU) fishing as a major threat to the effective management and conservation of regional fish stocks and are consequently seeking to identify vessels engaged in IUU fishing within respective areas of competence in order to effectively combat and eliminate these operations. Australia continues to seek the strengthening of existing fisheries management and conservation arrangements, to pursue the development and adoption of new measures (where appropriate) to combat IUU fishing and urge other countries not to support IUU fishing operations, and to fully implement key international instruments to ensure that their vessels do not act in contravention of their international obligations.

Labelling laws – food producers and suppliers in Australia

On July 1, 2016 changes to *section 134 of the Australia Consumer Law* introduced the *Country of Origin Food Labelling Information Standard 2016*.
As of 1 July 2018, businesses must now comply with the new labelling Standard. Businesses had two years to comply with the new labelling Standard before the changes became mandatory on 1 July 2018.

Products grown, produced or made in Australia now require labels to contain:

- the kangaroo in a triangle logo;
- a bar chart indicating the percentage of Australian ingredients; and
- an explanatory statement on whether the food was grown, produced or made in Australia along with the percentage of Australian ingredients.



Foods merely packed in Australia cannot feature the kangaroo in a triangle logo, and any food grown, produced, made, or packaged in a country other than Australia must specify the country of origin on the label. In most instances, these products will be required to carry a label featuring a bar chart and explanatory text, stating that the food was packaged in Australia and the proportion of Australian ingredients. Importantly, the well-known Australian Made logo is no longer able to be used on any food products sold in Australia. Food packaged and labelled from 1 July 2018 must follow rules as set out in the Standard.

Businesses that supply food for retail sale in Australia (including manufacturers, processors and importers) must be aware of their obligations under the Standard.

What about imported foods?

Imported foods must also display country of origin information. Like non-priority foods, imported foods only have to carry a text statement. Businesses have the option to use a label with a shaded bar chart if the imported food contains Australian grown or produced ingredients.

Example

From A jar of jam labelled "Made in the UK" means that the jam was processed in the UK.

If the jam contains Australian ingredients, it could carry a label with a shaded bar chart to show that the jam was processed in the UK using a certain proportion of Australian ingredients.

From 1 July 2018, the changes became mandatory and any failure to comply is likely to contravene the Australian Consumer Law (ACL), which may lead to enforcement action by the Australian Competition and Consumer Commission. Failure to adhere to the Standard may constitute misleading or deceptive conduct (*section 18 ACL*), or false or misleading representations about goods or services (*sections 29 and 151 ACL*).

The maximum financial penalty for a breach of the ACL is $1.1 million for a corporation, or $220,000 for an individual.

The penalties will vary on a case by case basis but for most contraventions are:

- $108,000 for a listed corporation
- $10,800 for a corporation, and
- $2,160 for individuals.

It is also an offence under the ACL for a person to supply goods that do not comply with the Standard. In addition, any breach of the ACL which has resulted in loss or damage to a third party may also result in that third party taking action.

6.4 Goods and Services Tax (GST)

Goods and Services Tax is a Value Added Tax introduced in 2000, which is collected by the Federal Government but a percentage is given to the State Governments. The Australian Constitution restricts the ability of individual States to collect excises or sales taxes. Whilst the rate is currently set at 10%, there are many domestically

consumed items that are effectively zero-rated (GST-free) such as fresh food, education, and health services, as well as exemptions for Government charges and fees that are themselves in the nature of taxes.

GST is payable by businesses, organisations and private individuals, whether they are registered for GST or not. However, if a GST-registered business or organisation imports goods as part of their activities, they may be able to claim a GST credit for any GST paid on those goods.

The Australian Customs Service (Customs) collects GST on taxable goods imported into Australia. The GST payable is 10% of the value of the imported product.

The value of the product is the sum of:

- The amount paid or payable to transport the goods to the port or airport of final destination in Australia (or the place in Australia to which goods are posted)
- The insurance cost for that transport.

Generally, GST is payable before the goods are released by Customs. The importer pays at the same time, at the same place, and in the same manner as they would customs duty (if the goods are subject to customs duty).

If an importer is registered for GST, they may be able to defer the payment of GST by participating in the deferred GST scheme. The scheme allows deferment of the payment of GST on taxable importations until the first activity statement lodged after the goods are imported.

Unless deferred, GST is paid when goods are imported. If a company is registered for GST, GST credits on imported products are claimed in the activity statement lodged for the tax period in which GST on that product is paid.

Example

Sam's Wholesale Supplies (SWS) is a general goods wholesaler and is registered for GST. SWS imports goods on 6 January.

- the customs value of the goods is $20,000;
- the customs duty payable for the goods is $1,000; and
- the transport and insurance costs are $2,000.

Therefore, the value of the importation is $23,000.

When SWS imports the goods, it pays Customs GST of 10% of the value of the importation or $2,300 (10% x 23,000).

On 27 January, SWS sells the goods to a retailer for $35,000 plus $3,500 GST. The GST-inclusive price of the goods is now $38,500.
SWS offsets the $2,300 GST it paid when the goods were imported against the $3,500 GST payable on the sale to the retailer.
SWS pays $1,200 (that is, $3,500 - $2,300) to the Federal Government.

The retailer sells the goods to the public on 30 January for $77,000. The retailer offsets the $3,500 included in the price he paid for the goods against the $7,700 GST he has to pay to Customs when he sells the goods.

Example: Low value goods imported by customer

Non-taxable importation and not a taxable supply.
Pete's Pilchards of Penzance advertises the latest pilchard paste on its UK website.
Jill in Sydney places an order and pays for a box worth $60.

Pete's Pilchards terms and conditions advise that the pilchards will be shipped from UK and Jill will be responsible for any taxes and customs formalities in her home country. Jill accepts the terms and conditions, and agrees for the pilchards to be sent by international post to her home in Sydney.

As the customs value of the product is under the low value import threshold, the import of the product will be a non-taxable importation. Immigration and Border Protection release the goods to Jill who is the addressee of the international postal package. As such, Jill is the importer of the product. Pete's Pilchards does not make a supply connected with Australia and; therefore, does not make a taxable supply.

Taxable supplies and low value imported goods

Sales of goods that are to be imported into Australia that have a customs value at or below $1,000 might be classed as non-taxable importations However, the supply of low value goods into Australia will be a taxable supply if the supply is connected with Australia.

For goods with a value of AU$ 1,000 or less, there are generally no duties, taxes or charges to pay at the border. However, from 1 July 2018, the Goods and Services Tax may be collected by overseas vendors of such low value goods when imported from overseas by consumers in Australia. **GST will be charged at the point of sale and not at the border**.

If you are the supplier of imported goods, your supply will be connected with Australia if one or more of the following applies:

- You import the goods;
- You install or assemble the goods in Australia;
- Your agreement to sell the goods occurs after the goods have been imported;
- You have purchased the goods that you are selling from the importer of those goods and on-sell the goods within Australia.

The following example looks at imported goods supplied under a trial period, where it is a non-taxable importation but it is likely to be a taxable supply.

Example

Hot Gadgets, an Australian supplier registered for GST, offers a new 'Magic Sweeper' at an introductory price of $259 through its call centre.
Hot Gadgets are offering customers a 30-day trial period to try the magic sweeper before purchase. Under the terms and conditions, the prospective customer is under no obligation to purchase the sweeper until the 30-day trial period has expired. If the sweeper is returned before the end of the trial period, no payment is required.

Hot Gadget's factory and warehouse are based in Hong Kong and all orders are processed and posted directly to prospective customers from overseas. The goods have a value of less than $1,000 and; therefore, will be a non-taxable importation unless ordered in bulk. At the

end of the 30-day trial period, if the goods have not been returned, Hot Gadget's customer has then purchased the goods and Hot Gadgets will charge the customer's credit card.

The purchase of the goods has occurred after the goods were imported; therefore the supply is connected with Australia. Hot Gadgets makes a taxable supply if all the other elements of the taxable supply rules are met.

If the customer pays at the time of order, then this will indicate that the supply has been committed to at the time of making the order. This would not be a trial period arrangement even if the customer is entitled to return the goods within 30 days.

6.5 General Points

A note on inspection

Cargo arriving in Australia can often be cleared by the Department of Agriculture and Water Resources using declarations and information provided by the importer. To decrease the likelihood that your goods will need to be opened and inspected, provide all required documents that need to accompany your goods. The department will issue the importer with a directive that goods are released from biosecurity control or if any actions are required (e.g. inspection, treatment, isolation, hold pending further information or insect identification).

Fees to cover the expense of operating these quarantine services depends on the way the consignment is presented to the Australian Quarantine and Inspection Service for inspection and the type of service provided.
Around 7% of loaded import containers are selected randomly for inspection.

Timely reporting

Cargo must be reported to Customs 48 hours prior to vessel arrival in most cases. Late reported cargo is still screened and risk assessed and is frequently held for inspection by Customs. Late reporting means that Customs inspection/examination process may commence late and may take longer than the three-day dwell period. It should be noted that late reported cargo is usually difficult for Customs to access and is only inspected as it becomes available.

The Australian Consumer Law (ACL)

The Australian Consumer Law is a national law that sets out specific provisions relating to the treatment of consumers and is contained in *Schedule 2 to the Competition and Consumer Act 2010*. The ACL regulates country of origin food claims by prohibiting a person from supplying (or offering to supply), manufacturing, processing or possessing for the purpose of supply, food that does not comply with the Standard, making false or misleading representations about the place of origin of goods, including food products, engaging in misleading or deceptive conduct in relation to a claim about the origin of goods, including food products.

Priority and non-priority foods

Non-priority foods must carry a country of origin text statement about where the food was grown, produced, made or packed.

A product is a non-priority food if it belongs to one of the following categories:

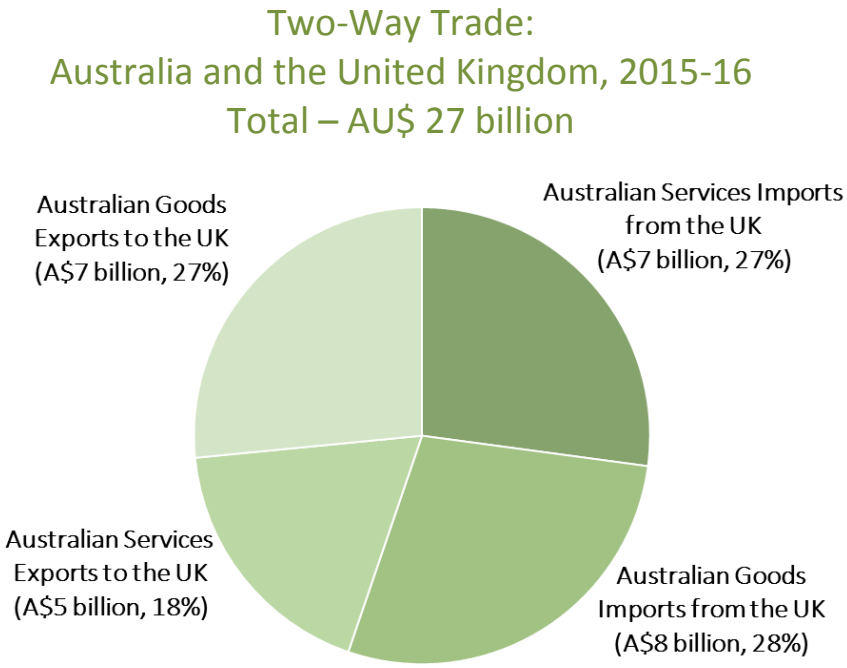
- seasoning (e.g. salt, spices and herbs);
- confectionery (e.g. chocolate, lollies, ice cream, popcorn);
- tea and coffee (in dry, or ready to drink, form);
- biscuits and snack food (e.g. chips, crackers and ready to eat savoury snacks);
- bottled water;
- soft drinks and sports drinks; and
- alcohol.

Everything else is a **priority food**. For example, priority foods include fruit and vegetables, meat, **seafood**, bread, milk, juice, sauces, honey, nuts and cereal.

If a priority food was grown, produced or made in Australia, its country of origin label will also feature a kangaroo in a triangle logo to help quick identify that the food is Australian in origin, a bar chart and text identifying the proportion of Australian content in the food (if any).

Priority foods can only claim to be produced or grown in Australia if they contain 100% Australian ingredients.

Section 7: OPPORTUNITIES FOR UK TRADE



***Note**: Totals may not add due to rounding*

Source: Australian Bureau of Statistics; Submission 29 Department of Foreign Affairs & Trade

7.1 Trade Policy and Trade Agreements

There is a 10,545 mile distance from Canberra to London, but it is often said that when we arrive in each other's countries, we feel as if we're at home, which is a nearly unique experience. Living and working in the UK remains a rite of passage for many Australians and around a million Australians visit the UK each year, resulting in about a billion pounds contributed to the UK economy each year.

Many Aussies know their way around London as well as they do Sydney or Melbourne As a nation they are generally familiar with things British and in many ways admire, but in others are baffled by British institutions. This ‘exchange’ is very much two way. Australia hosts the largest British expat population in the world – 1.2 million people. This is higher than the total number of British people living in the other 27 EU member states. But it would, however, be a mistake to assume that this large resident population and general familiarity with the UK is directly translatable as a marketing advantage and that Aussies and even UK expatriates will invariably buy British through some sort of sense of old country loyalty, particularly where there is a cheaper local alternative.

Despite the many similarities in many other ways Australians are culturally and physiologically different to Brits and it is important to remember that. Many, maybe most Brits living in Australia consider themselves to be Australian first and foremost (except when the Poms are playing Test cricket against the Aussies!) and don’t form communities rejoicing in all things British the way they do in some other countries which maybe feel more ‘foreign’ than does Australia.

The Australian Government is committed, according to the Department of Industry, Innovation and Science, to trade liberalisation through multilateral, regional and bilateral trade agreements where they are high-quality and provide business with commercially meaningful outcomes.

The UK Secretary of State for International Trade the Rt. Hon Liam Fox MP submitted that the UK Government wants the UK to be a champion of free trade and share Australia's commitment to global trade liberalisation and champion the benefits of open markets.

In April 2017, Australia and the EU concluded a scoping study in preparation for entering into Free Trade Agreement (FTA) negotiations. The UK will be a party to the negotiations until its exit process from the EU is complete.

The Australian Government has identified the following key objectives for the agreement:

- Negotiate a comprehensive, high-quality Australia-EU FTA that helps to ensure our trade and investment relationship reaches its full potential;
- The removal of barriers to trade in goods;
- The expansion of services linkages and investment ties; and,
- The facilitation of enhanced regulatory cooperation in specific sectors of interest to business.

Professor Philomena Murray and Dr Margherita Matera from the University of Melbourne and Dr Laura Allison-Reumann from the Nanyang Technological University have jointly submitted that the UK's decision to leave the European Union has resulted in questions about the Australian relationship with the UK, and the "extent to which Australia might ensure that relations with the EU remain strong and that those with the UK are strengthened". Australia's Trade Minister has made it clear that the government's priority is the EU Free Trade Agreement, and a recent study has shown that Australia should indeed follow this policy. The extent that the UK's exit from the EU will impact these negotiations remains an unknown factor.

The EU and Australia currently enjoy a relationship that is regarded as both constructive and substantial. It is characterised by an alignment of material interests, ideas and common values. The relationship has evolved from earlier decades of mutual misunderstanding and distance, where the engagement has been challenged by difficult relations at times.

A post-Brexit EU will, it is assumed by the Trade and Investment Queensland, be committed to continue operating as a cohesive economic union and will remain one of Australia's most significant partners and currently third largest. Australia's trade relationship with the EU outweighs trade with the UK by a ratio of approximately 3 to 1, so focus must be on the EU as well as separate opportunities with the UK.

The UK represents a small overall percentage of Australia's trade in comparison to Department of Foreign Affairs and Trade (DFAT)'s trade data for 2017 for the four leading trade partners (China at 22.7%, the US at 10.5%, Japan at 9.1% and the Republic of Korea at 5.1%). Thus, while the UK makes up a significant percentage of trade with Australia compared with the EU27, total trade with the EU27 outweighs trade with the UK by almost 3 to 1.15.

Australia-UK FTA

The UK is Australia's largest export market within the EU.
A UK-Australia FTA would be an opportunity to tailor outcomes to the interests of both parties and facilitate ongoing trade.

When, In September 2016, Liam Fox and the Australian Minister for Trade, Tourism and Investment, Steven Ciobo MP announced the establishment of a bilateral Trade Working group they laid the foundation for a focus on scoping the parameters of a future FTA, with the intent of expediting a high-quality outcome once the UK's withdrawal from the EU is finalised. The Department of Industry, Innovation and Science is supportive of this approach.

Trade

The United Kingdom is Australia's fifth largest two-way trading partner, worth $27 billion in 2015-16. According to the Australian Government's submission from DFAT, the UK is Australia's second largest trading partner in services. Australian exports to the UK are worth $4.9 billion and imports $7.3 billion. The trade in services is dominated by tourism, professional, technical and other business services.

The UK is a high priority export market for Australian firms, and Australia's top export market in Europe. Australian goods and services exports to the UK have a broad base, covering a wide range of sectors. This base includes activity by some of Australia's largest companies, such as in financial services, with Australian banks having a longstanding presence in the market, through to small and medium enterprises.

Economist Associate Professor Mark Melatos wanted to qualify the importance of the UK as a trading partner. The UK's current importance as Australia's 5th largest trade partner is artificially inflated by its membership of the EU. The value of the UK as a trade partner to Australian firms is mostly as a gateway to accessing the EU common market. Post-Brexit, the UK's value to Australian firms (and as a trade agreement partner) is likely to be greatly diminished.

Melbourne academic with expertise on the single market effects and the impact of Free Trade Agreements on corporations, Professor Gabriele Suder, submitted that some Australian firms, especially in the services industry, may reconsider favouring the UK as a European base due to its "institutional, historic and cultural proximity" to Australia because they "mainly use UK operations as a gateway into the Single Market." The scale and nature of the UK market is insufficient for Australian firms (versus trade and investment options in Asia) to remain attractive without this gateway function.

Australia's International Business Survey 2016 (ABIS 2016) saw the UK ranked fourth by Australian exporters for 'top current market' and for 'top future target market', behind the US, China and India, and just ahead of Indonesia.
Familiarity of culture and language and the opportunity for growth and profits were the most frequent reasons listed by exporters for targeting the UK. Of those that identified the UK as their most important overseas market, almost three quarters (73%) listed the ease of doing business as the same, or better, than in Australia.

The UK is also a valued merchandise goods partner, with Australian exports to the UK worth $7.2 billion and imports $7.6 billion. Australia's main exports to the UK are **gold**, **lead**, **alcoholic beverages**, which is mostly wine, **pearls** and **gems**.

Australian wine has been a market leader in the UK over the past decade. One in five imported bottles of wine consumed in the UK is from Australia. The UK is currently Australia's third most valuable wine export destination. Some other areas of recent export growth include **beef**, **diamonds** and **telecommunications** equipment.

In 2015-16, Victoria's merchandise imports from the UK amounted to just over $2 billion (2.9% of all imports to Victoria). Leading import items were **passenger motor vehicles** ($513 million), **pharmaceutical products** ($172 million) **medicaments** ($71 million) and **printed matter** ($66 million). Overall, UK exports to Victoria have enjoyed 5-year trend growth of nearly 7%.

Trade and Investment Queensland submitted that Australia and Queensland enjoy a robust trade and investment relationship with the UK, the 6th largest global economy. The UK is Queensland's ninth largest merchandise export market valued at $809.8 million in 2015-16.

The UK is NSW's 12th largest merchandise export destination, with $673.7 million in merchandise exports in 2015-16, a year-on-year increase of 5.3%. NSW's top merchandise exports were **miscellaneous manufactures**, **meat** and **meat preparations**, and **beverages**. Merchandise imports from the UK far outweigh NSW's exports. In 2015-16 merchandise imports were valued at $3.36 billion.

Source: Parliament of Australia: Overview of Australia's trade with the United Kingdom & Join Foreign affairs Defence and Trade with UK Interim Report 2018

Section 8: TRADE FAIRS

8.1 Identified Trade Fairs

No trade fairs specific to the seafood industry have been identified.

fine food Australia
Date: 09 – 12 Sep 2019
Venue: International Convention Centre Sydney (ICC Sydney)
Website: www.finefoodaustralia.com.au

Started in 1984, fine food Australia is a significant event in the food industry calendar and attracts exhibitors and industry professionals for the entire industry spectrum from Australia and overseas. Many national pavilions, industry association stands, and independent overseas exhibitors choose to display their wares at this event.

Fine Food Australia is a trade fair for food, beverage and hospitality industry as well as one of the most important fairs of its kind in Australia. Numerous exhibitors from home and abroad will present the latest products for the industry. Visitors are buyers and decision makers from the retail, food service and hospitality. The fair is an excellent opportunity to be informed about new trends and meet key industry contacts. The annual show alternates between Sydney & Melbourne.

foodpro
Date: 05 – 08 Jul 2020
Venue: Melbourne Convention & Exhibition Centre
Website: https://foodproexh.com

Foodpro is the largest event of its kind in Australasia, bringing together the food manufacturing and processing industry and will be of more interest to companies involved in this sector. The show will feature hundreds of Exhibitors representing manufacturers from around the world, and will attract thousands of qualified visitors.

Foodpro is an opportunity to meet face-to-face with specialist suppliers and compare an extensive range of ingredients, packaging solutions, as well as food processing machinery and technology all in one location.

Section 9: CONCLUSION

9.1 Future Opportunities

The date the UK is scheduled to leave the EU is now imminent; and even at this late stage it is uncertain how or even if the terms of this departure will be resolved. It does seem likely that a Free Trade Agreement with Australia will eventuate and that mutual benefits could accrue despite the dangers and uncertainties illustrated above.

The principal UK exports, **salmon** (more than 100,000 tonnes), **mackerel** (more than 80,000 tonnes) and **herring** (more than 40,000 tonnes), are species that would be of interest to the Australian consumer and a growing concern about sustainability and health dangers surrounding certain SE Asian production facilities mean that a demand for fish from healthy sustainable stocks is growing.

What is certain is that any UK exporter should prepare themselves for the opportunities that will arise if the proposed AU-UK FTA eventuates. Preparation and market knowledge will be vital to take full advantage of the situation. Currently the UK exports a minute quantity of seafood to Australia but opportunities through a FTA mean that this industry potentially has a once in a generation opportunity to capitalise upon the biggest change to the UK's trade environment in half a century.

Section 10: ANNEXES

ANNEX A: Status assessment summary for all species and species complexes

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Albacore	Indian Ocean (B)	Commonwealth	Sustainable
	South Pacific Ocean (B)	Commonwealth	Sustainable
Australian Salmons	Eastern Australia (B)	New South Wales	Sustainable
		Tasmania	
		Victoria	
	Western Australia (B)	South Australia	Sustainable
		Victoria	
		Western Australia	
Australian Sardine	Eastern Australia (B)	Commonwealth	Sustainable
		New South Wales	
		Victoria	
	Southern Australia (B)	South Australia	Sustainable
		Victoria	
	Western Australia South Coast (B)	Western Australia	Sustainable
	Western Australia West Coast (B)	Western Australia	Sustainable
Ballot's Saucer Scallop	Abrohlos Island and Mid-West Trawl managed Fishery (M)	Western Australia	Environmentally limited
	East Coast Otter Trawl Fishery (M)	Queensland	Overfished
	Shark Bay Scallop Managed Fishery (M)	Western Australia	Transitional-recovering
	South Coast Trawl Fishery (M)	Western Australia	Sustainable
	South West Trawl Managed Fishery (M)	Western Australia	Sustainable
Balmain Bugs	East Coast (B)	New South Wales	Sustainable
		Queensland	
	South Australia (J)	South Australia	Negligible
	Victoria (J)	Victoria	Negligible
	Western Australia (J)	Western Australia	Negligible
Banana Prawn	East Coast (M)	Queensland	Sustainable
	Exmouth Gulf Prawn Managed Fishery (M)	Western Australia	Sustainable
	Kimberley Prawn Managed Fishery (M)	Western Australia	Sustainable
	Nickol Bay and Onslow Prawn Managed Fisheries (M)	Western Australia	Sustainable
	Northern Prawn Fishery (M)	Commonwealth	Sustainable
Banded Morwong	Tasmanian Banded Morwong Fishery (M)	Tasmania	Transitional-depleting
	Victorian Banded Morwong Fishery (M)	Victoria	Undefined
Barramundi	Barramundi Fishery (M)	Northern Territory	Sustainable
	Central East Coast (B)	Queensland	Sustainable
	Kimberley Gillnet and Barramundi Managed Fishery (M)	Western Australia	Sustainable
	Mackay (B)	Queensland	Sustainable
	North-East Coast (B)	Queensland	Sustainable

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Barramundi (c'd)	Northern Gulf of Carpentaria (B)	Queensland	Sustainable
	Princess Charlotte Bay (B)	Queensland	Sustainable
	South-East Coast (B)	Queensland	Negligible
	Southern Gulf of Carpentaria (B)	Queensland	Transitional-depleting
Bigeye Tuna	Indian Ocean (B)	Commonwealth	Sustainable
	Pacific Ocean (B)	Commonwealth	Overfished
Black Jewfish	Gulf of Carpentaria (M)	Queensland	Undefined
	Northern Territory (J)	Northern Territory	Overfished
	Queensland East Coast (M)	Queensland	Undefined
	Western Australia (J)	Western Australia	Sustainable
Blacklip Abalone	New South Wales (J)	New South Wales	Sustainable
	South Australian Central Zone Fishery (M)	South Australia	Transitional-depleting
	South Australian Southern Zone Fishery (M)	South Australia	Transitional-depleting
	South Australian Western Zone Fishery (M)	South Australia	Transitional-depleting
	Tasmanian Bass Strait Zone Fishery (M)	Tasmania	Sustainable
	Tasmanian Central Western Zone Fishery (M)	Tasmania	Transitional-depleting
	Tasmanian Eastern Zone Fishery (M)	Tasmania	Sustainable
	Tasmanian Northern Zone Fishery (M)	Tasmania	Transitional-depleting
	Tasmanian Western Zone Fishery (M)	Tasmania	Transitional-depleting
	Victorian Central Zone Fishery (M)	Victoria	Transitional-depleting
	Victorian Eastern Zone Fishery (M)	Victoria	Transitional-depleting
	Victorian Western Zone Fishery (M)	Victoria	Sustainable
	Western Australia (J)	Western Australia	Negligible
Blacktip Sharks	East Coast (B)	New South Wales	Sustainable
		Queensland	
	Gulf of Carpentaria (B)	Northern Territory	Undefined
		Queensland	
	North and West Coast (B)	Northern Territory	Sustainable
		Western Australia	
Blue Grenadier	Commonwealth Trawl Sector (B)	Commonwealth	Sustainable
	Great Australian Bight Trawl Sector (B)	Commonwealth	Sustainable
Blue Mackerel	Eastern (B)	Commonwealth	Sustainable
		New South Wales	
		Tasmania	
	Western (B)	Commonwealth	Sustainable
		Tasmania	
		Western Australia	
Blue Swimmer Crab	Cockburn Sound (M)	Western Australia	Environmentally limited
	Gulf St. Vincent (B)	South Australia	Sustainable
	North-Eastern Australia (B)	Queensland	Sustainable
	Peel-Harvey Estuary (M)	Western Australia	Sustainable
	Shark Bay (M)	Western Australia	Transitional-recovering
	South-Eastern Australia (B)	New South Wales	Sustainable
	Spencer Gulf (B)	South Australia	Sustainable

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Blue Swimmer Crab (c'd)	West Coast (B)	South Australia	Undefined
	Western Australia North Coast (M)	Western Australia	Sustainable
	Western Australia South-West Coast (M)	Western Australia	Sustainable
Blue-eye Trevalla	Eastern Australia (B)	Commonwealth	Sustainable
		New South Wales	
		Queensland	
		Tasmania	
	Western Australia (B)	Western Australia	Sustainable
Commercial Scallop	Bass Strait Central Zone Scallop Fishery (M)	Commonwealth	Undefined
	Ocean Scallop Fishery (M)	Victoria	Undefined
	Port Phillip Bay Dive Scallop Fishery (M)	Victoria	Sustainable
	Tasmanian Scallop Fishery (M)	Tasmania	Undefined
Common Jack Mackerel	Eastern (B)	Commonwealth	Sustainable
		New South Wales	
		Tasmania	
	Western (B)	Commonwealth	Sustainable
		Tasmania	
	Coral Reef Fin Fish Fishery (M)	Queensland	Sustainable
	Gulf of Carpentaria (M)	Queensland	Undefined
	Northern Territory (J)	Northern Territory	Sustainable
	Torres Strait Finfish Fishery (M)	Commonwealth	Sustainable
	Western Australia (J)	Western Australia	Sustainable
Crimson Snapper	East Coast Queensland (B)	Queensland	Undefined
	North Coast Bioregion (B)	Western Australia	Sustainable
	Northern Australia (B)	Northern Territory	Sustainable
		Queensland	
Deepwater Flathead	Great Australian Bight (B)	Commonwealth	Sustainable
Dusky Flathead	New South Wales (J)	New South Wales	Undefined
	Queensland (J)	Queensland	Sustainable
	Victoria (J)	Victoria	Sustainable
Dusky Whaler	Eastern Australia (B)	Commonwealth	Undefined
		New South Wales	
	Western Australia (B)	Commonwealth	Transitional-recovering
		South Australia	
		Western Australia	
Eastern King Prawn	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
Eastern Rock Lobster	New South Wales Rock Lobster Fishery (B)	New South Wales	Sustainable
Eastern School Prawn	New South Wales (J)	New South Wales	Sustainable
	Queensland (J)	Queensland	Sustainable
	Victoria (J)	Victoria	Undefined
Eastern School Whiting	South-Eastern Australia (B)	Commonwealth	Sustainable
		New South Wales	

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Eastern School Whiting (c'd)		Tasmania	
		Victoria	
Endeavour Prawns	East Coast Otter Trawl Fishery (Red and Blue Endeavour Prawn) (M)	Queensland	Sustainable
	Exmouth Gulf Prawn Managed Fishery (Blue Endeavour Prawn) (M)	Western Australia	Sustainable
	North Coast Prawn Managed Fishery (Blue Endeavour Prawn) (M)	Western Australia	Sustainable
	Northern Prawn Fishery (Blue Endeavour Prawn) (M)	Commonwealth	Sustainable
	Northern Prawn Fishery (Red Endeavour Prawn) (M)	Commonwealth	Undefined
	Shark Bay Prawn Managed Fishery (Blue Endeavour Prawn) (M)	Western Australia	Sustainable
	Torres Strait Prawn Fishery (Blue Endeavour Prawn) (M)	Commonwealth	Sustainable
Gemfish	Eastern (B)	Commonwealth	Overfished
		New South Wales	
	Western (B)	Commonwealth	Sustainable
Giant Crab	Giant Crab Fishery (Tasmania) (M)	Tasmania	Overfished
	Giant Crab Fishery (Victoria) (M)	Victoria	Undefined
	South Australia (J)	South Australia	Undefined
	Western Australia (J)	Western Australia	Sustainable
Goldband Snapper	East Coast Queensland (M)	Queensland	Undefined
	Gascoyne (B)	Western Australia	Sustainable
	Kimberley (B)	Western Australia	Sustainable
	Northern Australia (B)	Northern Territory	Sustainable
		Queensland	
	Pilbara (B)	Western Australia	Sustainable
Golden Snapper	East Coast (M)	Queensland	Undefined
	Gulf of Carpentaria (M)	Queensland	Sustainable
	Northern Territory (J)	Northern Territory	Overfished
	Western Australia (J)	Western Australia	Sustainable
Gould's Squid	South-Eastern Australia (B)	Commonwealth	Sustainable
		New South Wales	
		Tasmania	
Greenlip Abalone	South Australian Central Zone Fishery (M)	South Australia	Transitional-depleting
	South Australian Southern Zone Fishery (M)	South Australia	Undefined
	South Australian Western Zone Fishery (M)	South Australia	Sustainable
	Tasmanian Greenlip Abalone Fishery (M)	Tasmania	Transitional-depleting
	Victorian Central Zone Fishery (M)	Victoria	Overfished
	Victorian Western Zone Fishery (M)	Victoria	Overfished
	Western Australian Area 2 Fishery (M)	Western Australia	Transitional-depleting
	Western Australian Area 3 Fishery (M)	Western Australia	Transitional-depleting
Grey Mackerel	Gulf of Carpentaria (B)	Northern Territory	Sustainable
		Queensland	
	North East Queensland (B)	Queensland	Sustainable

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Grey Mackerel (c'd)	North West Northern Territory (B)	Northern Territory	Sustainable
	South East Queensland (B)	Queensland	Sustainable
	Western Australia (B)	Western Australia	Sustainable
Gummy Shark	Eastern Australia (B)	New South Wales	Undefined
	Southern Australia (B)	Commonwealth	Sustainable
		New South Wales	
		South Australia	
		Tasmania	
		Victoria	
		Western Australia	
King George Whiting	Gulf St. Vincent (B)	South Australia	Transitional-depleting
	Spencer Gulf (B)	South Australia	Transitional-depleting
	Victoria (J)	Victoria	Sustainable
	West Coast - Eyre Peninsula (B)	South Australia	Sustainable
	Western Australia (J)	Western Australia	Sustainable
King Threadfin	East Coast (M)	Queensland	Sustainable
	Gulf of Carpentaria (B)	Queensland	Transitional-depleting
	Northern Territory (J)	Northern Territory	Sustainable
	Western Australia (J)	Western Australia	Sustainable
Luderick	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
		Tasmania	
		Victoria	
Mackerel Icefish	Heard Island and McDonald Islands (B)	Commonwealth	Sustainable
Moreton Bay Bugs	East Coast Otter Trawl Fishery (M)	Queensland	Sustainable
	Northern Prawn Fishery (M)	Commonwealth	Sustainable
	Torres Strait Prawn Fishery (M)	Commonwealth	Sustainable
	Western Australia (J)	Western Australia	Sustainable
Mud Crabs	Arafura-West Mud Crab Fishery (M)	Northern Territory	Sustainable
	East Coast (M)	Queensland	Sustainable
	Estuary General Fishery (M)	New South Wales	Undefined
	Gulf of Carpentaria (M)	Queensland	Sustainable
	Kimberley Developing Mud Crab Fishery (M)	Western Australia	Sustainable
	Western Gulf of Carpentaria Mud Crab Fishery (M)	Northern Territory	Transitional-depleting
Mulloway	New South Wales (J)	New South Wales	Overfished
	Queensland (J)	Queensland	Undefined
	South Australia (J)	South Australia	Sustainable
	Western Australia (J)	Western Australia	Sustainable
Murray Cod	Australian Capital Territory (J)	Australian Capital Territory	Undefined
	New South Wales (J)	New South Wales	Undefined
	Queensland (J)	Queensland	Undefined
	South Australia (J)	South Australia	Undefined
	Victoria (J)	Victoria	Undefined

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Orange Roughy	Cascade Plateau (B)	Commonwealth	Sustainable
	Eastern Zone (M)	Commonwealth	Sustainable
	Great Australian Bight (M)	Commonwealth	Undefined
	South Tasman Rise (B)	Commonwealth	Overfished
	Southern Zone (M)	Commonwealth	Overfished
	Western Zone (M)	Commonwealth	Overfished
Ornate Rock Lobster	North-Eastern Australia (B)	Commonwealth	Sustainable
		Northern Territory	
		Queensland	
	Western Australia (J)	Western Australia	Negligible
Pale Octopus	South Australia (J)	South Australia	Negligible
	Tasmania (J)	Tasmania	Sustainable
	Victoria (J)	Victoria	Undefined
Patagonian Toothfish	Heard Island and McDonald Islands (M)	Commonwealth	Sustainable
	Macquarie Island (B)	Commonwealth	Sustainable
Pink Ling	Eastern (B)	Commonwealth	Sustainable
		New South Wales	
	Western (B)	Commonwealth	Sustainable
Pipi	New South Wales (J)	New South Wales	Undefined
	South Australia (J)	South Australia	Sustainable
	Victoria (J)	Victoria	Undefined
Red Emperor	East Coast Queensland (M)	Queensland	Undefined
	Gascoyne (B)	Western Australia	Sustainable
	Gulf of Carpentaria (M)	Queensland	Undefined
	Kimberley (B)	Western Australia	Sustainable
	Northern Territory (J)	Northern Territory	Undefined
	Pilbara (B)	Western Australia	Sustainable
Redthroat Emperor	East Coast Queensland (B)	Queensland	Sustainable
	Western Australia (B)	Western Australia	Transitional-recovering
Saddletail Snapper	East Coast Queensland (B)	Queensland	Undefined
	North Coast Bioregion (B)	Western Australia	Sustainable
	Northern Australia (B)	Northern Territory	Sustainable
		Queensland	
Sand Whiting	New South Wales (J)	New South Wales	Sustainable
	Queensland (J)	Queensland	Sustainable
Sandbar Shark	Eastern Australia (B)	New South Wales	Undefined
		Queensland	
	Western Australia (B)	Northern Territory	Transitional-recovering
		Western Australia	
School Shark	Southern Australia (B)	Commonwealth	Overfished
		New South Wales	
		South Australia	
		Tasmania	
		Victoria	

SPECIES	STOCK	JURISDICTION	STOCK STATUS
School Shark (c'd)		Western Australia	
Sea Mullet	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
	Western Australia (B)	Western Australia	Sustainable
Silver Trevally	Commonwealth (J)	Commonwealth	Sustainable
	New South Wales (J)	New South Wales	Transitional-depleting
	Queensland (J)	Queensland	Undefined
	Tasmania (J)	Tasmania	Undefined
	Victoria (J)	Victoria	Undefined
	Western Australia (J)	Western Australia	Sustainable
Silverlip Pearl Oyster	Northern Territory (J)	Northern Territory	Undefined
	Queensland (J)	Queensland	Sustainable
	Western Australia (J)	Western Australia	Sustainable
Snapper	East Coast (B)	New South Wales	Undefined
		Queensland	
		Victoria	
	Gulf St. Vincent (B)	South Australia	Sustainable
	Shark Bay Inshore Denham Sound (B)	Western Australia	Sustainable
	Shark Bay Inshore Eastern Gulf (B)	Western Australia	Sustainable
	Shark Bay Inshore Freycinet Estuary (B)	Western Australia	Sustainable
	Shark Bay Oceanic (M)	Western Australia	Transitional-recovering
	South Coast (M)	Western Australia	Sustainable
	Spencer Gulf/West Coast (B)	South Australia	Transitional-depleting
	West Coast (M)	Western Australia	Transitional-recovering
	Western Victoria (B)	South Australia	Sustainable
		Victoria	
Snook	New South Wales (J)	New South Wales	Negligible
	South Australia (J)	South Australia	Sustainable
	Tasmania (J)	Tasmania	Undefined
	Victoria (J)	Victoria	Undefined
	Western Australia (J)	Western Australia	Sustainable
Southern Bluefin Tuna	Global (B)	Commonwealth	Overfished
Southern Calamari	Commonwealth (J)	Commonwealth	Undefined
	New South Wales (J)	New South Wales	Sustainable
	South Australia (J)	South Australia	Sustainable
	Tasmania (J)	Tasmania	Sustainable
	Victoria (J)	Victoria	Sustainable
Southern Garfish	Northern Gulf St. Vincent (B)	South Australia	Overfished
	Northern Spencer Gulf (B)	South Australia	Transitional-recovering
	Scalefish Fishery (B)	Tasmania	Transitional-depleting
	South Coast (Western Australia) (B)	Western Australia	Undefined
	South-East (B)	South Australia	Undefined
	Southern Gulf St. Vincent (B)	South Australia	Sustainable
	Southern Spencer Gulf (B)	South Australia	Sustainable

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Southern Garfish (c'd)	Victoria (J)	Victoria	Sustainable
	West Coast (South Australia) (B)	South Australia	Undefined
	West Coast (Western Australia) (B)	Western Australia	Overfished
Southern Rock Lobster	Southern Australia (B)	South Australia	Sustainable
		Tasmania	
		Victoria	
		Western Australia	
Southern Sand Flathead	South Australia (J)	South Australia	Negligible
	Tasmania (J)	Tasmania	Transitional-depleting
	Victoria (J)	Victoria	Environmentally limited
	Western Australia (J)	Western Australia	Negligible
Spanish Mackerel	East Coast (B)	New South Wales	Sustainable
		Queensland	
	Gulf of Carpentaria (M)	Queensland	Sustainable
	Mackerel Managed Fishery (M)	Western Australia	Sustainable
	Northern Territory (J)	Northern Territory	Sustainable
	Torres Strait Spanish Mackerel Fishery (B)	Commonwealth	Sustainable
Spanner Crab	East Coast (B)	New South Wales	Sustainable
		Queensland	
Spotted Mackerel	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
	Northern Australia (B)	Queensland	Sustainable
	Western Australia (B)	Western Australia	Negligible
Stout Whiting	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
Swordfish	Indian Ocean (B)	Commonwealth	Sustainable
	South-West Pacific Ocean (M)	Commonwealth	Undefined
Tailor	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	
		Victoria	
	Western Australia (B)	Western Australia	Sustainable
Tiger Flathead	Southern Australia (B)	Commonwealth	Sustainable
		New South Wales	
		Tasmania	
		Victoria	
Tiger Prawns	East Coast Otter Trawl Fishery (Brown and Grooved Tiger Prawn) (M)	Queensland	Sustainable
	Exmouth Gulf Prawn Managed Fishery (Brown Tiger Prawn) (M)	Western Australia	Sustainable
	New South Wales (J)	New South Wales	Negligible
	North Coast Prawn Managed Fisheries (Brown Tiger Prawn) (M)	Western Australia	Sustainable
	Northern Prawn Fishery (Brown Tiger Prawn) (M)	Commonwealth	Sustainable
	Northern Prawn Fishery (Grooved Tiger Prawn) (M)	Commonwealth	Sustainable

SPECIES	STOCK	JURISDICTION	STOCK STATUS
Tiger Prawns (c'd)	Shark Bay Prawn Managed Fishery (Brown Tiger Prawn) (M)	Western Australia	Sustainable
	Torres Strait Prawn Fishery (Brown Tiger Prawn) (M)	Commonwealth	Sustainable
Venus Clam	Georges Bay Venus Clam Fishery (M)	Tasmania	Environmentally limited
Vongoles	Ansons Bay Vongole Fishery (M)	Tasmania	Environmentally limited
	Coffin Bay Cockle Fishing Zone (M)	South Australia	Sustainable
	Port River Cockle Fishing Zone (M)	South Australia	Overfished
	West Coast Cockle Fishing Zone (M)	South Australia	Sustainable
	Western Australian Vongole Fishery (M)	Western Australia	Negligible
West Australian Dhufish	Western Australia (B)	Western Australia	Transitional-recovering
Western King Prawn	East Coast Otter Trawl Fishery (M)	Queensland	Sustainable
	Exmouth Gulf Prawn Managed Fishery (M)	Western Australia	Sustainable
	Gulf St. Vincent Prawn Fishery (M)	South Australia	Transitional-depleting
	North Coast Prawn Managed Fisheries (M)	Western Australia	Sustainable
	Shark Bay Prawn Managed Fishery (M)	Western Australia	Sustainable
	South West Trawl Managed Fishery (M)	Western Australia	Sustainable
	Spencer Gulf Prawn Fishery (M)	South Australia	Sustainable
	West Coast Prawn Fishery (M)	South Australia	Sustainable
Western Rock Lobster	West Coast Rock Lobster Managed Fishery (B)	Western Australia	Sustainable
Yelloweye Mullet	South Australia (J)	South Australia	Sustainable
	Tasmania (J)	Tasmania	Sustainable
	Victoria (J)	Victoria	Transitional-depleting
	Western Australia (J)	Western Australia	Transitional-depleting
Yellowfin Bream	Eastern Australia (B)	New South Wales	Sustainable
		Queensland	Sustainable
		Victoria	Sustainable
Yellowfin Tuna	Indian Ocean (B)	Commonwealth	Transitional-depleting
	Western and central Pacific Ocean (B)	Commonwealth	Sustainable
Yellowtail Kingfish	Eastern Australia (B)	Commonwealth	Undefined
		New South Wales	
		Queensland	
	Western Australia (B)	Western Australia	Sustainable

Source: Fisheries Research & Development Corporation, Status of Australian Fish Stocks Reports 2016

ANNEX B: ASX-listed Seafood Companies

The demand for quality seafood products is set to increase and certain Australian producers are well positioned to capitalise upon this opportunity, despite some significant risks.

As at the date of this report there are 8 seafood companies listed on the ASX:

- Angel Seafood Holdings Ltd.
- Clean Seas Seafood Ltd.
- Huon Aquaculture Group Ltd.
- Murray Cod Australia Ltd.
- New Zealand King Salmon Co. Ltd.
- Ocean Grown Abalone Ltd.
- Tassal Group Ltd.
- Seafarms Group Ltd.

Angel Seafood Holdings Limited (AS1)
Angel Seafood Holdings is a South Australian based aquaculture company operating out of Coffin Bay, Haslam, Smoky Bay and Cowell in the Eyre Peninsula region of SA. It produces certified, sustainable and organic Pacific Rock Oysters. AS1 listed on the 19th of February 2018.

Key Executives: **Isaac "Zac" Lee Halman, Founder & CEO**
Catherine Manuel, Company Secretary

Address: 24 Nicholson Avenue, Coffin Bay SA 5607
Mob: +61 427 891 200
Email: info@angelseafood.com.au
Website: www.angelseafood.com.au

Clean Seas Seafood Limited (CSS)
Clean Seas was formed by The Stehr Group in 2000 and was publicly listed in 2005. The company's initial purpose was to propagate and grow Southern Bluefin Tuna, however its secondary endeavour with regionally indigenous Kingfish became highly prized in its own right. As a consequence, Clean Seas refocused its efforts on sustainable production of Hiramasa Kingfish.
Today, Clean Seas is the global leader in full cycle breeding, production and sale of Yellowtail Kingfish and is renowned world-wide for its exceptionally high-quality fish. Our company is recognised for innovation in Yellowtail Kingfish farming and has become the largest producer of aquaculture Yellowtail Kingfish outside Japan.

Key Executives: **David J Head, Managing Director & CEO**
Wayne Materne, CFO & Company Secretary

Address: 7 North Quay Boulevard, Port Lincoln SA 5606
Tel: +61 8 8683 0975
Email: customerservice@cleanseas.com.au
Website: www.cleanseas.com.au

Huon Aquaculture Group Limited (HUO)
Huon Aquaculture Group focuses on farming, processing, marketing, and distributing fresh and value added Atlantic salmon and trout products in Australia and Asia. An ethical business, HUO is Australia's second largest producer of Atlantic Salmon.
Majority privately owned, the Huon Aquaculture Group produces over 17,000 tonnes of fresh salmon per year and is recognised globally as being the premium producer of fresh and smoked salmon products.
Huon employs over 550 multi-skilled staff in most states of Australia and both Peter and Frances remain involved in all areas of the business on a daily basis.

Key Executives: **Peter Bender, CEO & Managing Director & Co-Founder**
Frances Bender, Executive Director & Co-Founder

Address: Hideaway Bay Head Office PO Box 42 Dover TAS 7117
Tel: +61 3 6295 8111 | Fax: +61 3 6295 8151
Email: huonaqua@huonaqua.com.au
Website: www.huonaqua.com.au

Aquna Aquaculture, trading as Murray Cod Australia Limited (MCA)
By using a land-based aquaculture model, Aquna has one of the lowest environmental footprints in the industry. On 30 March 2011, Aquna, which trades as Murray Cod Australia Limited, was publicly listed on the Australian Securities Exchange (MCA:ASX).
Murray Cod Australia is a combination of three businesses; hatchery, nursery and a grow-out farm that operate as an integrated operation to produce high-quality Murray cod, which is Australia's premium native. Murray cod which is only harvestable in Australia, making it the largest producer of the fish in the world.
Murray Cod Australia has lost almost 8000 fish after oxygen levels in a pond hit catastrophically low levels. Staff managed to rescue 12,076 fish, Murray Cod told investors. "Due to rigorous emergency procedures implemented by staff 60 % of the stock in the pond were able to be saved despite the severe drop in dissolved oxygen that occurred overnight." The dead fish were worth $175,960 but are expected to be covered under insurance and won't have a material impact on the company's finances.

Key Executives: **Ross Anderson, Executive Chairman**
Mathew Ryan, Managing Director & Executive Director

Address: Aquna Aquaculture, trading as Murray Cod Australia Limited
Head Office Level 1, 153 Yambil Street, Griffith NSW 2680
Tel: +61 2 6964 1544 | Fax: +61 2 6964 1546
Email: murraycod@aquna.com
Website: https://aquna.com

New Zealand King Salmon (NZK)
NZK is a New Zealand producer of King Salmon which supplies product to Australia and internationally. They have been growing and selling salmon for more than 30 years. Today they employ around 500 people.
New Zealand investors make up a significant percentage of the ownership of NZK and the communities of Marlborough, Nelson Bays and Tasman are well represented with nearly 400 of the 2,800 shareholders from the Top of the South.
NZK's King Salmon are raised in arguably the cleanest rearing environments in the world. From the crystal clear waters flowing from Te Waikoropupū Springs near Takaka, to the majestic marine environment that is the Marlborough Sounds, New Zealand King Salmon are farmed in one of the most sustainable ways possible. Through hard work and innovation, New Zealand King Salmon has developed into one of New Zealand's leading Aquaculture companies. The company is respected for its clean, healthy and humane practices as well as its superior quality salmon.

Key Executives: **Grant Rosewarne, Managing Director & CEO**
Alan Cook, Chief Operating Officer

Address: Head Office 93 Beatty Street, Tahunanui Nelson 7011 NEW ZEALAND
Tel: +64 3 548 5714 | Fax: +64 3 538 0874
Email: contact@kingsalmon.co.nz or grant.rosewarne@kingsalmon.co.nz
Website: https://www.kingsalmon.co.nz

Tassal Group Limited (TGR)
TGR Tassal Group's operations include hatching, farming, processing, sales and marketing of Atlantic salmon. From humble beginnings, they are now Australia's leading seafood producer and the largest producer of Atlantic salmon.
Their focus on quality and sustainability has underpinned their reputation as a global pioneer and leader. A geographically diverse footprint across Tasmania makes them an integral contributor to regional communities and that is why their vision is one they share with all their stakeholders – to create a better tomorrow through our sustainable operations. Food is the most critical need for future generations, particularly sustainable salmon – food with a low-carbon profile that is also a superfood. Tassal's people are passionate about producing a healthy, sustainable protein, which is experiencing increasing demand both in Australia and internationally.

Key Executives: **Mark Ryan, Managing Director & CEO**
Monika Maedler, General Counsel & Company Secretary

Address: Head Office Lvl 9, Marine Board Building 1 Franklin Wharf, Hobart TAS 7000
Tel: +61 3 6244 9099 or +61 3 6244 9035 (Monika) | Fax: +61 3 6244 9002
Email: tassal@tassal.com.au
Website: www.tassal.com.au

Ocean Grown Abalone Limited (OGA)
Ocean Grown Abalone owns and operates an abalone sea ranching business in Australia. It has developed the world's first commercial abalone ranching business in Flinders Bay. After close to 20 years researching, developing and inventing a new technology, OGA's sea ranching technique was born and the abitat was developed.
Sea ranching is an aquaculture technique where hatchery bred juvenile abalone are placed on OGA designed artificial reefs (abitats), which are placed in the ocean and left to nature to grow for 2-3 years until they reach a marketable size. They feed and survive in the wild. The abalone produced from the sea ranch is identical to the highly sought after wild catch product, but has the competitive advantages that only aquaculture can provide.
OGA can supply year-round to meet market demands to whatever size or product specification the market requires. Importantly, the sustainability of the abalone using this technique is proven and monitored on an ongoing basis.

Key Executives: **Brad Adams, Managing Director**
Ian Ricciardi, Executive Director

Address: Level 3, 3 Cantonment Street, Fremantle WA 6160
Tel: +61 8 6181 8888 | Fax: +61 8 6181 8899
Email: info@oceangrown.com.au
Website: www.oceangrown.com.au

Seafarms Limited (SFG)
Seafarms is an aquaculture company which operates, builds and invests in sustainable aquaculture production. The first listed seafood company in Australia (July 1999), it is one of the largest aquaculture operators in Australia selling products under the Crystal Bay Prawns® brand.
SFG is Australia's largest producer of Black Tiger Prawns. SFG plans to develop a stand-alone marine prawn (shrimp) production system of approximately 10,000 hectares in Northern Australia producing +100,000 tonnes of prawns per year. Construction of a new production facility titled Project Sea Dragon will allow them to increase their current production of 1,700 tonnes to a proposed 150,000 tonnes at full capacity.

Key Executive: **Harley Whitcombe, CFO, Secretary & Executive Director**

Address: Level 11, 225 St George's Terrace, Perth WA 6000
Tel: +61 8 9216 5200 | Fax: +61 8 9216 5199
Email: info@seafarms.com.au
Website: https://seafarms.com.au

ANNEX C: Directory of Seafood Companies in Australia

Allan Barnett Fishing Co
Operating in Tasmania's wild catch fisheries in SE Australia. Product for export or domestic market. They catch fresh Tasmanian Scallops; with an export registered vessel, they are able to freeze the scallops (Pectin Fumatus) whole to be exported overseas. Fishing season from June to December. They also have a processing facility, where they sell the scallops fresh wholesale and retail.
Address: Main Road, Bridport TAS 7262
Tel: +61 3 6356 1733 | Mob: +61 428 561 733 | Fax: +61 3 6356 1711
Contact: **Keith Allan Barnett, Owner**
Skype: allanbarnettfishing | Email: barnett@vision.net.au
Website: www.facebook.com/AllanBarnettFishingCompanyAndSuperfreshSeafoods

A.R.(Tony) Garth Fish Processor P/L
30 years' experience in export of Live Southern Rock Lobster to Asian markets. Australian market: live, fresh, cooked, frozen Southern Rock Lobster, Tasmanian Scallops.
Address: 367 Brightwater Road, Howden TAS 7054
Tel: +61 3 6267 2405 | Fax: +61 3 6267 2810
Contact: **Ken Smith, Export Manager**
Email: smithk@garthfish.com.au

Australian Native Shellfish (David Maidment Oysters)
Produces Sydney Rock Oysters (Saccostrea glomerata) and Native Flat Oysters (Ostrea angasi). The business consists of a hatchery, grow out leases, Packing and Processing shed on the south coast of NSW Australia.
Address: Barlows Bay, Riverview Road, Narooma NSW 2546
Tel: +61 2 4476 7758 | Fax: +61 2 4476 775
Contact: **David Maidment, Owner**
Email: maidment.david@gmail.com
Website: https://davidmaidmentoysters.wordpress.com/contact

Australian Ocean King Prawn Company
Suppliers of whole, raw and cooked, wild caught Ocean King Prawns to both the domestic and international markets. Trawler owners and operators. Cold Stores.
Address: 1-7 Ellengowan Street, Urangan, Hervey Bay QLD 4655
Tel: +61 7 4125 4823 | Mob: +61 418 726 414 | Fax: +61 7 4125 6344
Contact: **Stephen Murphy, Manager**
Email: stephen@oceankingprawns.com.au
Website: www.oceankingprawns.com.au

Ballina Quality Bait
Family owned wholesale bait supplier catching & operating from the far north coast of NSW. Specialising in wild caught bait prawns, frozen & delivered Australia-wide. The product is white spot free and none of it is sourced from QLD.
Address: Alstonville NSW 2477
Tel: +61 2 6628 1645 | Mob: +61 414 865 495 | Fax: +61 2 6628 6059
Contact: **Tom O'Grady, Owner**
Email: ballinaqualitybait@bigpond.com
Website: https://ballinaqualitybait.com

Blue Sky Fisheries Pty Ltd
Seafood trading company specialising in the export of Australian abalone worldwide. They also import fish into Australia for wholesale distribution. Greenlip abalone, haliotis rubra, garfish, Australian herring, canned abalone.
Address: 51/81 Carrington Street, Adelaide SA 5000
Tel: +61 8 8359 3088 | Fax: +61 8 8359 2900
Contact: **David Pickles, General Manager**
Email: david@bluesky.com.au
Website: www.blueskyfisheries.com.au

Buckley's Oysters of Wapengo
Award Winning producer of Premium Live Wild Organic Wapengo Lake Rock Oysters. Supplying restaurants and retailers, with a passion for the freshest produce, the highest quality live Sydney Rock oysters grown in pristine waters.
City: Wapengo Rocks, Wapengo Lake Road, Wapengo NSW 2550
Address: +61 2 6494 0070 | Mob: +61 408 866 211 | Fax: +61 2 6494 0070
Contact: **Shane Buckley, Owner**
Email info@wapengorocks.com.au
Website: http://wapengorocks.com.au

BWD Holdings Pty Ltd
Direct sellers of 100% wild caught Tiger prawns and Banana prawns all packed at sea in export cartons by accredited operators. They also supply Barramundi fillets which are also wild caught and fresh snap frozen in IQF boxes. Full chain of custody documents and all export documentation.
Address: Cairns QLD
Mob: +61 418 725 753
Contact: **Brett Davison**
Email: brett@ausminerals.com.au

Chapman Valley Aquaculture
Aquaculture producer, wholesalers and retailers of Silver Perch fingerlings, Whole Live Silver Perch, Marron and Barramundi.
Address: 388 Hickety Road, Nabawa WA 6532
Mob: +61 400 618 484 (Leanne) & +61 429 118 588 (Wayne) | Fax: +61 8 99641190
Contacts: **Leanne Barndon, Director & Wayne**
Email: wljrrbarndon@wn.com.au
Website: http://chapmanvalleyfishingpark.com.au

Clouder Pty Ltd
The biggest Frozen Golden Pompano (Frozen Golden Pomfret) producer in Asia and the biggest producer of Tilapia in South Sea China. Exports to both US and EUR. The raw materials processed are mainly from the company's own raising farms. Being chain producers, they produce everything from the start to end product.
Address: Docklands VIC 3008
Mob: +61 423 044 407
Contact: **Daniel Yang**
Email: yanghaoran5@hotmail.com

Europa Epic-Cure
Europa Epic-cure distributes fine Salmon and fine food products. Specialities include Tasmanian, Norwegian and Danish Salmon, Smoked Salmon and Caviar.
Customer base is mainly foodservice; cafes, restaurants, hotels, retirement villages and the hospitality industry. Europa prides itself in having the largest range of frozen, raw and chilled Salmon products.
Address: 44 Robert Street, Rozelle NSW 2039
Tel: +61 2 9810 6888 | Fax: +61 2 9810 6566
Contact: **Clive Sacher, Owner & Managing Director**
Email: admin@europasalmon.com.au
Website: www.europasalmon.com.au

J. Manias & Co.
J. Manias & Co. harvests wild-caught seafood such as: snapper, calamari, flathead, king george whiting, founder, leather jackets etc.
Address: Melbourne VIC
Mob: +61 428 282 299 | Fax: +61 3 9408 8483
Contact: **Maria Manias, Business Administration Officer**
Email: m-manias@hotmail.com

Jamberoo Aquaculture
A family owned freshwater fish farm located on the south coast of NSW. They grow Silver Perch, Golden Perch and Blue Claw Yabbies that are for sale for farm dams, aquaponics and restaurants. They also sell premium quality fish food (Silver Perch - Bidyanus bidyanus, Golden Perch - Macquaria ambigua, Blue Claw Yabbies - cherax destructor, Fish Food)
Address: 28 Croome Vale Road, Jamberoo NSW 2533
Tel: +61 2 4236 0000
Contacts: **Alan & & Carmel Pemberton, Owners**
Email: manager@silverperch.com.au
Website: www.silverperch.com.au

Kimberley Wildcatch
Fishing vessel operators and wholesalers of tropical reef fish including red emperor, goldband snapper, Rankin cod, spangled emperor, mixed reef fish, coral trout and scarlet perch.
Address: 39a Blackman Street, Broome WA 6725
Tel: +61 8 9192 2889 | Fax: +61 8 9192 7792
Contacts: **Adam & Alison Masters, Owners**
Email: kimwild2@bigpond.net.au

Mackay Reef Fish Supplies Pty Ltd
Wholesalers and exporters of Australian fish and seafood.
Address: 2 River Street, Mackay QLD 4740
Tel: +61 7 4957 6497 | Fax: +61 7 4957 2043
Contact: **David Caracciolo, Owner**
Email: sales@mackayreeffish.com
Website: www.mackayreeffish.com

Mainstream Aquaculture Pty Ltd
Supplies Barramundi (Lates calcarifer) grown from pristine natural spring water using a re-circulation aquaculture system that produces premium seafood in an environmentally sustainable manner.
Address: 73 Lock Avenue, Werribee VIC 3030
Tel: +61 3 9734 1912 | Fax: +61 3 9734 1917
Contact: **Boris Musa, Managing Director & Chief Executive Officer**
Email: enquiries@mainaqua.com.au
Website: www.mainstreamaquaculture.com

Mooloolah River Fisheries Pty Ltd
Seafood Processor, Wholesaler, Exporter, Distributor and Retailer 80km from Brisbane.
Wholesale - a major supplier of Queensland Wild Caught Product to the wholesale seafood industry across Australia and internationally.
Distribution - services the hospitality industry for the greater Sunshine Coast areas.
Fish Market - the Sunshine Coast's largest seafood retail offering the biggest range of fresh and cooked seafood to the public.
Address: Lot 201 Parkyn Parade, Mooloolaba QLD 4557
Tel: +61 7 5452 5600 | Fax: +61 7 5452 4699
Contacts: **Tony Pinzone, Beverly Atkins & Murray Scott, Owners**
Email: seafood@mooloolahfish.com.au | murray@mooloolahfish.com.au
Website: https://mooloolahfish.com.au

Morgan's The Fish & Prawn Specialists
Owned and operated by commercial fishermen. 18 years' experience in the industry, specialises in locally caught ocean fresh seafood. Reef Fish, Barramundi & Estuary Fish, Prawns Crabs, Scallops, Bugs, Oysters, Bait suppliers to local fishermen.
Address: 6282 Peak Downs Highway, Racecourse QLD 4740
Tel: +61 7 4952 6196 | Mob: +61 488 255 096
Contact: **Kelly Morgan, Owner**
Email: fishmorgans@gmail.com

Ocean Exports Pty Ltd
Exporters of all seafood caught in Queensland waters.
Frozen: scallops, king prawns, coral trout, spanner crabs. Live: spanner crabs, mud crabs. Chilled: whiting, mackerel, reef fish.
Address: P.O. Box 123, Maryborough QLD 4650
Tel: +61 7 4121 0933 | Fax: +61 7 4121 0944
Contact: **Mark Kroning, Managing Director**
Email: info@oceanexports.com.au
Website: www.oceanexports.com.au

Redrock Lobster Pty Ltd
Selling premium southern rock lobster (Jasus edwardsii) into the domestic Australian market and the specialising in the Asian market since 1990.
Address: 17-23 King Street, Smithton TAS 7330
Tel: +61 3 6452 1878 | Mob: +61 428 521 878 | Fax: +61 3 6452 3444
Contacts: **Ashton Marshall, General Manager & Ian Heathorn, Managing Director**
Email: ash@redrocklobsters.com.au & ian@redrocklobster.com.au
Website: https://www.facebook.com/Redrock-Lobster-Pty-Ltd-360650380762063

Seafood Exporters Australia Pty Ltd
The only certified organic oyster farm in Australia, SEA harvests the freshest oysters from pristine Australian waters. It is one of the largest processors, distributors, importers, exporters and retailers of Fresh and Frozen Seafoods in Australia.
SEA has oyster farms in Coffin Bay, Ceduna, Haslam and Port Lincoln and can deliver straight from the Australian ocean to worldwide destinations within 48-hours.
Address: Unit 3, 287 Cormack Road, Wingfield SA 5013
Tel: +61 8 8262 2788 | Mob: +61 458 606 916
Contact: **Michael Filippidis, CEO**
Skype: michael filippidis
Email: seafoodmike@bigpond.com
Website: www.australiapacificoysters.com

Tas Prime Oysters
Exporters of Live Pacific Oysters, Asia & European destinations.
Address: 230 Hanslows Road, Cambridge TAS 7170
Tel: +61 3 6248 4792 (James) | Mob: +61 409 234 304 (Jane) | Fax: +61 3 6248 4793
Contacts: **James Calvert Managing Director & Jane Kenane, Manager**
Email: tasprimeoysters@bigpond.com
Website: https://tasprimeoysters.com

Tasmanian Pacific Oyster Co
Providing the highest quality seafood to Melbourne and surrounding areas for over 30 years. Fresh Fish Fillets - Salmon Tassal fresh and smoked, Ocean Trout Huon fresh and smoked, King Fish Hiramasa Cleanseas, Barramundi, Flathead, sword fish, snapper, blue eye, Sashimi Grade Seafood - Tuna, Salmon, Ocean Trout, King Fish, Sword Fish, Oysters Tasmanian, South Australian, Sydney, Prawns - Australian, Whole, Cooked, Green, Frozen Seafood, Prawn Cutlets, Chips, Fish Fillets, Crustaceans and Shell fish, crayfish, crabs, mussels, clams, pipis etc.
Address: 209 Kensington Road, West Melbourne VIC 3003
Tel: +61 3 9689 6444 | Fax: +61 3 9689 6633
Contacts: **Alkis & John Christopoulos**
Email: tpoc@tpoc.com.au
Website: www.tpoc.com.au

Source: www.sea-ex.com/countryinfo/australi.htm

ANNEX D: Potential Importers

Blue Sky Fisheries Pty Ltd
Seafood trading company specialising in the export of Australian abalone worldwide. They also import fish into Australia for wholesale distribution.

Contact: **David Pickles, General Manager**
Address: 51/81 Carrington Street, Adelaide SA 5000
Tel: +61 8 8359 3088 | Mobile: +61 418 843 798 | Fax: +61 8 8359 2900
Email: david@blueskyfisheries.com.au
Website: www.blueskyfisheries.com.au

Bowpan Seafoods Pty Ltd
Established in 1997, Bowpan Seafoods is a family owned and operated company. They specialise in the Import and Export of frozen seafood out of Myanmar (Burma), Vietnam, China, Oman & Yemen

Contact: **Mr Geive Nanavati, Director**
Address: 5/40 Roccella Loop, Ashby WA 6065
Tel: +61 8 6201 5854 | Mobile: +61 412 089 985
Skype: geive1 | Email: geive@iinet.net.au
Website: www.bowpanseafoods.com.au

BWD Holdings Pty Ltd
BWD are direct sellers of 100% wild caught Tiger prawns, Banana and Barramundi fillets which are wild caught and fresh snap frozen in IQF boxes.

Contact: **Brett Davison, Managing Director**
Address: Trinity Park, Cairns QLD 4879
Mobile: +61 418 725 753
Email: brett@ausminerals.com.au

Europa Epic-Cure
Europa Epic-cure distributes fine Salmon and fine food products. Specialities include Tasmanian, Norwegian and Danish Salmon, Smoked Salmon and Caviar.
Customer base is mainly foodservice; cafes, restaurants, hotels, retirement villages and the hospitality industry. Europa prides itself in having the largest range of frozen, raw and chilled Salmon products.

Contact: **Clive Sacher, Owner & Managing Director**
Address: 44 Robert Street, Rozelle NSW 2039
Tel: +61 2 9810 6888 | Fax: +61 2 9810 6566
Email: admin@europasalmon.com.au
Website: www.europasalmon.com.au

Fishtrade International
FishTrade imports and exports mainly small pelagics and specialises in supplying aqua-feed, bait, recreational bait, trap bait and pet food. Frozen product includes sardine, herring, menhaden, mackerels, anchovy, squid, saury, kahawai.
The company owns a factory producing fish hydrolysate (emulsion) for agricultural use and livestock feed.

Contact: **Charles Franchina, Director**
Address: 91/93 South Terrace, Fremantle WA 6160
P.O. Box 694, 91 South Terrace, Fremantle WA 6160
Tel: +61 8 9335 1812 | Fax: +61 8 9335 1813
Skype: fishtrade.international | Email: charles@fishtrade.com.au
Website: http://www.sampi.com.au

Five Star Seafoods (SA) Pty Ltd
Five Star Seafoods has met the standard of process control required to enter into a 'FPA' Food Processing Accreditation arrangement with the Australian Quarantine and Inspection Service. Also certified to export into the EU.
Five Star Seafoods are ROCK LOBSTER Exporters, shipping LIVE or FROZEN Lobster throughout the world. Five Star Seafoods buy and ship the product direct to an airport and straight to the customer.

Contact: **William Ferguson, Director**
Address: 9/11 Standish St, Port Macdonnell SA 5291
P.O. Box 233, Port Mac Donnell SA 4740
Tel: +61 8 8738 2203 or +61 8 8738 2007 | Fax: +61 8 8738 2173
Email william@fergusunaustralia.com

Frank Mason & Associates
Frank Mason & Associates are experienced Importers and Exporters of Seafood and claim to be able to source items that are difficult or impossible to obtain. The company services the amateur and professional fishers worldwide with a strong emphasis of servicing the needs of companies that are involved in value adding.

Contact: **Frank Mason, Managing Director**
Address: 243 Peel Street, North Melbourne VIC 3051
Tel: +61 3 9328 2211 | Mob: +61 412 346 479 | Fax: +61 3 9328 3350
Email: frank@frankmason.com.au
Website: www.frankmason.com.au

Friend and Burrell
Internationally exports & imports to Australia and trades in specialty items such as wild and farmed caviar, Spanish jamon, Bortaga and Mohamma.

Contact: **Simon Friend, Partner**
Address: 8 Hillcrest Avenue, Kew VIC 3101
Tel: +61 405 424 860
Email: simon@friendandburrell.com.au
Website: www.friendandburrell.com.au

International Export & Import Australia
The company is eager to hear from suppliers of all varieties of seafood and states that they have need for frozen product either air or sea-freight. The company has agents in Asia and Europe.

Contact: **Joseph Alexander, Owner**
Address: 12 Jardier Terrace, South Morang VIC 3752
Mob: +61 400 491 315 | Fax: +61 3 9408 9107

Poulos Bros Seafoods Pty Ltd
Established in 1968, this is one of the largest processors, distributors, importers, exporters and retailers of Fresh and Frozen Seafoods and related food products in Australia. Poulos Bros Seafoods is a family owned and operated business servicing the Seafood requirements of the Sydney Food Service and Hospitality Industries (Atlantic Salmon, Barramundi, Blue Eye, John Dory, Leather Jacket, Dory, Mullet, Ocean Trout, Snapper, Sardines).

Contact: **Peter C. Poulos, General Manager**
Address: PO Box 28, Pyrmont NSW 2009
Tel: +61 2 9692 8411 | Fax: +61 2 9692 9934
Email: pcpoulos@poulosbros.com.au
Website: www.poulosbros.com.au

Red Coral Seafood
Contract processors and packers for exporters. Wholesale distributors Victoria wide. Tasmania & South Australia. Over 30 years' experience in the industry

Contact: **James Marinopoulos, Sales Manager**
Address: 20 Michellan Court, Bayswater VIC 3153
Tel: +61 3 9720 6622 | Mob: +61 422 658 711 | Fax +61 3 9720 6633
Email: info@redcoralseafood.com.au
Website: www.redcoralseafood.com.au

Regal Seafoods Pty Ltd
Established in 1991 from humble beginnings, Regal Seafoods now employs over 60 staff members and supplies over 250 hospitality venues across the state.
The company operates three facilities in Victoria; South Melbourne, Laverton North and Phillip Island.

Contact: **John Panopoulos, Director**
Address: 1-9 & 11-13 Thistlethwaite Street, South Melbourne VIC 3205
Tel: +61 3 9645 9198 | Mob: +61 416 024 893 | Fax: +61 3 9645 9199
Email: sales@regalseafoods.com.au
Website: www.regalseafoods.com.au

Seafood Exporters Australia Pty Ltd
Seafood Exporters Australia are aquaculture, processors, exporters, wholesalers, retailers, and restaurant suppliers; and can deliver straight from the Australian ocean to worldwide destinations within 48-hours. SEA harvests fresh oysters from oyster farms situated in Coffin Bay, Ceduna, Haslam and Port Lincoln.
SEA has the only certified organic oyster farm in Australia.

Contact: **Michael Filippidis, CEO**
Address: Unit 3, 287 Cormack Road, Wingfield SA 5013
Tel: +61 8 8262 2788 | Mob: +61 458 606 916
Skype: michael filippidis | Email: seafoodmike@bigpond.com
Website: www.australiapacificoysters.com

Seafood Store Pty Ltd
Importers, Processors, Wholesale Distributors, Agents and Retail Sales.

Products include frozen fish, barramundi, basa, flathead, hake, hoki, red emperor, rockling, sardine, silver fish, silver whiting, smooth dory, sweetlip snapper, white bait, whiting, king george whiting, salmon, fish roe, smoked seafood, prawns & shrimps, crayfish, scampi, yabbies, oysters, mussels, scallops, squid & calamari, octopus, value added products.

Contact: **Steven Gambrellis, General Manager**
Address: 37 Catalina Drive, Tullamarine VIC 3043
Tel: +61 3 9335 5530 | Fax: +61 3 9335 5770
Email info@seafoodstore.com.au
Website: www.seafoodstore.com.au

Southern Trading Pty Ltd
Southern Trading Australia (formerly Southern Trading Co) is a vertically integrated seafood processing and trading entity with more than 15 years' experience in the processing and exporting of quality Australian Seafood.
Southern Trading has firmly established itself as a specialised seafood and exporter and has earned a reputation for delivering premium quality seafood into the international market. Its seafood is sourced from the pristine seawater of Australia including both of the Indian and Pacific Oceans.

Contact: **Glen Bosman, Managing Director**
Address: 16 Emplacment Crescent, Hamilton Hill WA 6163
Tel: +61 8 9336 5111 | Mob: +61 417 982 887 | Fax: +61 8 9336 5122
Skype: glen.peter.bosman | Email: gbosman@southerntrading.com.au

Streaky Bay Marine Products Pty Ltd
Distribute throughout Australia. Export Greenlip and Blacklip Abalone. Processors of Scalefish, and Crustaceans for the domestic market. Greenlip Abalone, Haliotis Laevigata, Blacklip Abalone, Haliotis Rubra, King George Whiting, Southern Calamari, Snapper, Garfish, Blue Swimmer Crabs, Gummy Shark Fillets

Contact: **Damon Edmunds, Managing Director**
Address: 12 Alfred Terrace, Streaky Bay SA 5680
Tel: +61 8 8626 1161 | Mob: +61 429 000 006 | Fax +61 8 8626 1603
Email: streakybaymp@bigpond.com
Website: www.streakybayseafood.com.au

Tassal Group Ltd
The leading Tasmanian salmon producer and a pioneer of Australian aquaculture. Their fresh Atlantic salmon is farmed in the pristine waters of the Southern Ocean, providing the perfect growing environment for delicious fine quality salmon.

Contact: **Mark Ryan, Managing Director & CEO**
Address: 2 Salamanca Square, Battery Point TAS 7004
GPO Box 1645, Hobart TAS 7001
Tel: +61 3 6244 9099 | Fax: +61 3 6244 9002
Email: tassal@tassal.com.au
Website: www.tassal.com.au

Vasiliki Lobsters

Seafood wholesaler / exporter / retailer, specialising in rock lobsters, bought directly from their network of fishermen. Vasiliki Lobsters is a wholly Australian owned family business, which has been operating for over 35 years.

Contact: **Steve Kolivas, Director**
Address: 3/163 Chesterville Road, Moorabbin VIC 3182
Tel: +61 3 9555 5997 | Fax: +61 3 9555 5992
Email: questions@vasilikilobsters.com.au
Website: www.vasilikilobsters.com.au

ANNEX E: List of Major Australian Ports

Darwin Port
GPO Box 390 Dawin NT 0801
Administration Building, 11 Export Drive Berrimah NT 0828
Tel: +61 8 8919 0800
Email: darwinport@darwinport.com.au
Website: www.darwinport.com.au
Contacts: **Terry O'Connor, Chief Executive Officer**
Ian Niblock, General Manager Operations

Darwin Port is operated by Darwin Port Operations Pty Ltd which is part of the Landbridge Group; a large private company based in Rizhao city in Shandong Province in China, operating businesses in China and Australia. Andrew Robb, a former Australian Trade Minister announced his retirement from politics in February 2016 to become a "high-level economic consultant" with Landbridge which has been granted a 99-year lease on the Port of Darwin. The Darwin Port operates commercial wharf facilities at East Arm Wharf and the cruise ship terminal at Fort Hill Wharf.

The Port of Darwin is strategically positioned as Australia's nearest port to Asia and the nation's 'northern gateway' for Australasian trade. It is also a key support hub for the expanding offshore oil and gas fields in the Arafura Sea, Timor Sea and waters off the coast of Western Australia. It is the only port between Townsville and Fremantle with full access to multi-modal transport services.

Flinders Port Holdings
PO Box 19 Port Adelaide SA 5015
296 St Vincent Street, Port Adelaide SA 5015
Tel: +61 8 8447 0611 | Fax: +61 8 8447 0606
Email: flindersports@flindersports.com.au
Website: www.flindersports.com.au
Contacts: **Stewart Lammin, Chief Executive Officer**
Carl Kavina, General Manager

Flinders Ports is South Australia's leading port operator with seven ports located at Port Adelaide, Port Lincoln, Port Pirie, Thevenard, Port Giles, Wallaroo and Klein Point. In addition to our port operations we also have a hydrographic survey division, called HydroSurvey Australia.

As part of Flinders Port Holdings, the privately-owned ports and logistics group, Flinders Ports strives for the highest standards, with certifications in safety, environmental and quality management systems.

Fremantle Ports
PO Box 95 Fremantle WA 6959
1 Cliff Street, Fremantle WA 6160
Tel: +61 8 9430 3555 | Fax: +61 8 9336 1391
Email: mail@fremantleports.com.au
Website: www.fremantleports.com.au
Contacts: **Chris Leatt-Hayter, Chief Executive Officer**
Allan Gray, Harbour Master & General Manager Port Operations

In a country where trade is of such high importance, a developed and robust maritime sector is indispensable for the growth of domestic economy. The Port of Fremantle contributes to that, supporting the growth of the local and national economy, with the port employing many people.

The port currently handles such goods as: clinker (cement), coal, gypsum, coke, iron ore, slag, fertilizers and sulfuric acid. The total value of the port's trade was 35.76 million tons, at over €26 billion.

Geelong Port
PO Box 344, Geelong VIC 3220
Corio Quay Road, Geelong VIC 3215
Tel: +61 3 5247 0200 | Fax: +61 3 5257 1560
Email: m.controllers@geelongport.com.au (marine controllers)
Website: www.geelongport.com.au
Contacts: **Brett Winter, Chief Executive Officer**
Adam Gordon, General Manager Operations

Geelong Port is located 75 kilometres by road southwest of Melbourne and comprises 15 berths across two primary precincts, Corio Quay and Lascelles. The port was privatised in 1996, Geelong Port is owned by SAS Trustee Corporation (STC) and Brookfield's LINX Cargo Care Group, with 50% ownership by each party at a unit trust and operator level.

As the second largest port in Victoria, Geelong Port handles more than 10.5 million tonnes of product annually across a broad range of industry segments, including crude oil, wood-chip, fertiliser and break bulk cargo. Geelong Port is a major driver of Victoria's economy, managing in excess of $7 billion of trade and generating more than 1,800 jobs across the state. Major port customers include Viva Energy Australia, Midway Limited, Incitec Pivot Limited, Boral Limited and Terminals Pty Ltd.

Geelong Port handles over 600 vessel visits every year, with a majority of the shipping activity linked to the bulk liquid berth at Refinery Pier. While Geelong Port manages wharf and land-side infrastructure, the Victorian Regional Channels Authority (VRCA) is responsible for channel management and commercial navigation of commercial waters in and around

Gladstone Ports Corporation
PO Box 259, Gladstone QLD 4680
40 Goondoon Street, QLD 4680
Tel: +61 7 4976 1333 | Fax: +61 7 4972 3045
Email: geninfo@gpcl.com.au
Website: www.gpcl.com.au
Contacts: **Peter O'Sullivan, Chief Executive Officer**
Benjamin Hayden, Operations General Manager

Gladstone Ports Corporation is a Government Owned Corporation responsible for supporting and facilitating the trade of Central Queensland's major resource industries – including coal, liquefied natural gas and alumina - as well as agriculture and bulk product.

The corporation manages and operates three port precincts – the Port of Gladstone, Port of Rockhampton and Port of Bundaberg and has an integral role in planning the future of these ports. In consultation with the community, industry and government, the corporation undertakes a strategic approach to planning, setting the vision and direction for all three ports for the short and long term.

Kimberley Ports Authority
PO Box 46, Broome WA 6725
401 Port Drive, Broome WA 6725
Tel: +61 8 9192 1304 | Fax: +61 8 9192 1778
Email: info@kimberleyports.wa.gov.au
Website: www.kimberleyports.wa.gov.au
Contacts: **Kevin Schellack, Chief Executive Officer**
Luke Westlake, Operations Manager

The Kimberley Ports Authority has been enabled under the Ports Legislation Amendment Act 2014. The Minister and Department of Transport undertook a review of "The Role of Ports in Western Australia" in 2012 which initiated the ports amalgamation process. As a result, the Kimberley Ports Authority will in due course assume the current Department of Transport responsibilities at the following ports: Wyndham Port, Derby Port, Yampi Sound Ports of Cockatoo and Koolan Islands (potentially Irvine Island), and the proposed Port at James Price Point.

The Kimberley encompasses an area of 424,517km and has a population of some 38,801. Total exports last year were 144,332 tonnes and included 89,780 head of cattle. Total imports equalled 158,825 tonnes with 967 vessel visits.

Mid West Ports Authority
PO Box 1856, Geraldton WA 6531
298 Marine Terrace, Geraldton WA 6530
Tel: +61 8 9964 0520 | Fax: +61 8 9964 0555
Email: mail@midwestports.com.au
Website: www.midwestports.com.au
Contacts: **Rochelle Macdonald, Chief Executive Officer**
Lindsay Morrison, General Manager Operations

Geraldton is a coastal city 424km north of Perth. At the 2016 Census its urban population was 37,432.

In addition to catering for exports of grains, minerals and livestock, and imports of fertiliser, mineral sands, project / general cargo and fuel, Geraldton Port also welcomes cruise ships, oil rig tenders and many different exhibition craft. The Port also supports Geraldton's lucrative fishing industry, providing berthing facilities, maintenance, waste disposal and security services to the Fishing Boat Harbour.

North Queensland Bulk Ports Corporation
GPO Box 409 BRISBANE QLD 4001
Tel: +61 7 3011 7900 | Fax: +61 7 3011 7999
Email: info@nqbp.com.au
Website: www.nqbp.com.au
Contacts: **Nicolas Fertin, Chief Executive Officer**
Brendan Webb, General Manager Trade & Operations

Weipa, Abbot Point, Mackay and Hay Point trading ports, and the non-trading port of Maryborough, all come under the care and authority of North Queensland Bulk Ports. More than half of Queensland's trade by tonnage passes through our operating ports. We take great care to provide safe, sustainable and competitive seaport services to efficiently facilitate the process.

• Port of Weipa – Around 200km from the tip of Australia, it handles more than 30 million tonnes of product per year, most of which is bauxite.
• Port of Abbot Point – Australia's most northern coal export port, located in naturally deep water around 25km north of Bowen.
• Port of Mackay – A major servicing centre for Central Queensland's mining and agriculture, it is the state's fourth largest multi-commodity port by throughput.
• Port of Hay Point – Two separate terminals, Hay Point and Dalrymple Bay, service mines throughout the Bowen Basin.

NSW Ports
PO Box 297, Port Botany NSW 1455
Email: enquiries@nswports.com.au
Website: www.nswports.com.au
Contacts: **Marika Calfas, Chief Executive Officer**
Jonathan Lafforgue, General Manager Operations & Environment

NSW Ports is a consortium of leading institutional investors: IFM Investors (including Cbus, HESTA and Hostplus), Australian Super, Tawreed Investments Limited and Q Super. Shareholders represent over five million Australian superannuation fund members and are long term investors with interests in a range of Australian infrastructure assets.

NSW Ports manages four major infrastructure assets including Port Botany and Port Kembla which are economic assets of national significance, critical to the future economic growth and development of NSW.
• Port Botany – the port is vital to the economic wellbeing of Sydney and New South Wales. It is home to the state's largest container facility. It is New South Wales' primary bulk liquid and gas port with dedicated common user facilities.
• Port Kembla – this port is home to the state's largest motor vehicle import hub and grain export terminal. It is the second largest coal export port in New South Wales and also handles a range of dry bulk, bulk liquid and general cargo.

Pilbara Ports Authority
PO Box 84, West Perth WA 6872
Level 3, 16 Parliament Place, West Perth WA 6005
Tel: +61 8 6217 7112 | Fax: +61 8 9226 2196
Email: info@pilbaraports.com.au
Website: www.pilbaraports.com.au
Contacts: **Roger Johnston, Chief Executive Officer**
John Finch, General Manager Operations

Pilbara Ports Authority stretches from the Port of Ashburton near Onslow in the south, to the Port of Port Hedland in the north, and includes the future Ports of Anketell and Cape Preston East.
Port of Port Hedland Total Tonnage (2017 – 18) 519,408,000
Port of Dampier Total Tonnage (2017 – 18) 177,339,000

Port Authority of New South Wales
PO Box 25, Millers Point NSW 2000
Level 4, 20 Windmill Street, Walsh Bay NSW 2000
Tel: +61 2 9296 4999 | Fax: +61 2 9296 4655
Email: enquiries@sydneyports.com.au
Website: www.portauthoritynsw.com.au
Contact: **Grant Gilfillan, Chief Executive Officer & Director**

The port's history dates back to 1811. Until 1995, the port's owner was the Sydney Ports Corporation, and from 1 July 2014 it has been Port Authority of New South Wales. It is responsible for the management, development and functioning of seaport infrastructure in this region (Sydney Harbour, Glebe Island and White Bay, Port of Eden, Port of Yamba).

This second largest seaport in Australia is called Port Botany and is located near the Sydney airport. The container port in the city accepts both liquid and solid goods.

Port of Brisbane Pty Ltd
Locked Mail Bag 1818, Port of Brisbane QLD 4178
3 Port Central Avenue, Port of Brisbane QLD 4178
Tel: +61 7 3258 4888 | Fax: +61 7 3258 4703
Email: portbris@portbris.com.au
Website: www.portbris.com.au
Contact: **Roy Cummins, Chief Executive Officer**

Located on the east coast in the suburbs of the city of Brisbane with 2.3 million residents, it is currently the third busiest port in Australia and the fastest growing container port. Every year, the Brisbane seaport handles over 2600 ships and transports more than 28 million tons of cargo. A big and costly problem is sludge getting stuck in the port's sewers, etc., which prevents transportation. Its removal consumes millions of dollars a year.

At the port, there is a terminal for accepting liquid goods. Crude oil is the main import good. Other goods include fertilizers, chemicals, motor vehicles, clinker (cement) and gypsum, paper and paper products, and also construction machines. Exported products include coal, refined oils, grains, wood chips, mineral sand, scrap, meat products and cotton.

Port of Hastings Development Authority
PO Box 129, Hastings VIC 3915
Stony Point Depot, 1d Stony Point Road, Crib Point VIC 3919
Tel: +61 3 5979 5500 | Fax: +61 3 5979 5555
Email: enquiries@portofhastings.com
Website: www.portofhastings.com
Contact: **Malcolm Geier, Chief Executive Officer**

PoHDA, as Port Operator is responsible for managing the operations at the Port of Hastings, including maintaining the associated port infrastructure (except for the BlueScope owned steel wharves). The channels in Western Port are within the control of the Victorian Regional Channels Authority.

Port of Melbourne
GPO Box 2149, Melbourne VIC 3001
Level 4, 530 Collins Street, Melbourne VIC 3000
Tel: + 61 3 6245 1890
Website: www.portofmelbourne.com
Contacts: **Brendan Bourke, Chief Executive Officer**
Keith Gordon Executive General Manager Operations

Melbourne's port has nearly a 180 year of history. Since 1 July 2003, the Port of Melbourne has been managed by the Port Melbourne Corporation. In 2006-2007, it became the first Australian port to handle two million TEU a year. Nowadays, it handles nearly 2.6 million TEU and around 3000 ships annually.

Port of Newcastle
PO Box 790, Newcastle NSW 2300
6 Newcomen Street, Newcastle NSW 2300
Tel: +61 2 4908 8200 | Fax: +61 2 4929 6943
Email: info@portofnewcastle.com.au
Website: www.portofnewcastle.com.au
Contacts: **Craig Carmody, Chief Executive Officer**
Keith Wilks, Executive Manager Marine & Operations

The Port of Newcastle is one of Australia's largest and most diverse ports and is the largest coal export terminal in the world. A major trade and logistics hub, the Port handles a diverse range of cargo types, including dry bulk, project, bulk liquids, break bulk, Ro-Ro and containers. Its channel can accommodate double the current trade and direct connections to road and rail networks link the Port with a large catchment area across NSW.

Together with direct water frontage and potential for deep water berthing, the Newcastle Container Terminal has the capacity for a 2 million TEU per annum container terminal, coupled with a shipping channel that can accommodate vessels up to 10,000 TEU, with the capability of even larger vessels with some ancillary channel modifications.

Port of Portland Pty Ltd
PO Box 292, Portland VIC 3305
23-25 Kunara Crescent, Portland VIC 3305
Tel: +61 3 5525 0900 | Fax: +61 3 5521 7488
Email: information@portofportland.com.au
Website: www.portofportland.com.au
Contacts: **Greg Tremewen, Chief Executive Officer**
Shannon Curran, Operations Manager & Deputy Port Security Officer

Port of Portland is a deep-water bulk port strategically located between the ports of Melbourne and Adelaide. It is the international gateway specialising in bulk commodities, particularly agricultural, forestry and mining products as well as aluminium and fertiliser. It has approximately six million tonnes in annual throughput. The export trade includes grain, woodchips, logs, aluminium ingots and livestock, while import commodities are alumina, liquid pitch and fertiliser products.

The Port's close proximity to shipping lanes and deep-water approaches provides unimpeded access right to the entrance of the harbour basin. The Port is served by both road and rail systems, which bypass the City of Portland to allow 24-hour access. It delivers $2.5 billion into the region and the nation each year.

Port of Townsville Ltd
PO Box 1031 TOWNSVILLE QLD 4810
Tel: +61 7 4781 1500 | Fax: +61 7 4781 1525
Email: info@townsville-port.com.au
Website: www.townsville-port.com.au
Contact: **Ranee Crosby, Chief Executive Officer**
Drew Penny, General Manager Operations

The Port of Townsville operates 8 berths and handled nearly $8 billion in trade during the 2016-17 financial year. It is the largest container and automotive port in Northern Australia and the largest general cargo port in Northern Australia creating around 8,000 jobs and servicing a population of nearly 800,000 people.

North Queensland farmers export agricultural products, and mining companies need the Townsville port to export minerals. Townsville is the number one exporter in Australia of copper, zinc, lead and sugar and with its close locality to Asian markets, it is ideally placed to service a growing economy. More than 20 shipping lines operate out of the Townsville Port; offering more 40 services and covering 136 ports around the world.

Imports include motor vehicles, general cargo, cement, sulphuric acid, fertiliser, copper, nickel, zinc, copper anode, petroleum products, sulphur, containers (carrying furniture, electrical goods, household items, clothing, construction materials etc).

Ports North
PO Box 594, Cairns QLD 4870
1 Spence Street, Cairns QLD 4870
Tel: +61 7 4052 3888 | Fax: +61 7 4052 3853
Email: enquiries@portsnorth.com.au
Website: www.portsnorth.com.au
Contacts: **Chris Boland, Chief Executive Officer**
Richard Stevenson, Manager Operations

Of the nine ports operated by Ports North in Far Northern Queensland there are three ports which are central to the export and import industry:

• Port of Cairns – The Port is reached via a sea entrance channel maintained by dredging to a depth of 8.3m at lowest tide, with a 3.5m tidal range. This range allows for ships with a draft of 10.5m to access the port. The channel is six nautical miles long and leads into Trinity Inlet. With 10 wharves, easy channel access, no shipping congestion and a world-class maritime industry, the Port of Cairns is an ideal hub for project cargo opportunities at local, national and international level.
It is the most northern trading port on the eastern seaboard of Australia, and the natural centre for supplies shipped to the mining and coastal communities north and west of Cairns including the North East Mineral Province, the Torres Strait Islands, Gulf of Carpentaria and Freeport Indonesia.

• Port of Mourilyan – Approximately 100 kilometres south of Cairns and 20 kilometres to the south of the city of Innisfail, the port is a natural deep-water port with commercial facilities including a bulk sugar and molasses terminal, a live cattle export facility and an adjacent 2ha open bulk storage stock pad recently developed to accommodate exports including magnetite, silica sand and bauxite.
• Port of Karumba – In the south-east corner of the Gulf of Carpentaria, the Port of Karumba handles general cargo trade for a number of Gulf communities and live cattle exports. Karumba is also a trans-shipment port for the Port of Weipa and other Gulf communities including Mornington Island.

Southern Ports Authority
PO Box 1049 West Perth WA 6005
Level 4, 679 Murray Street, West Perth WA 6872
Tel: +61 8 9235 8000
Email: enquiries@southernports.com.au
Website: www.southernports.com.au
Contact: **Steve Lewis, Chief Executive Officer**

Southern Ports was established on 1 October 2014 following the merger of Albany Port Authority, Bunbury Port Authority and Esperance Port Authority as governed by the enabling legislation the Port Authorities Act 1999 WA. Southern Ports operates as a Western Australian Government Trading Enterprise whose sole shareholder is the Western Australian State Government.

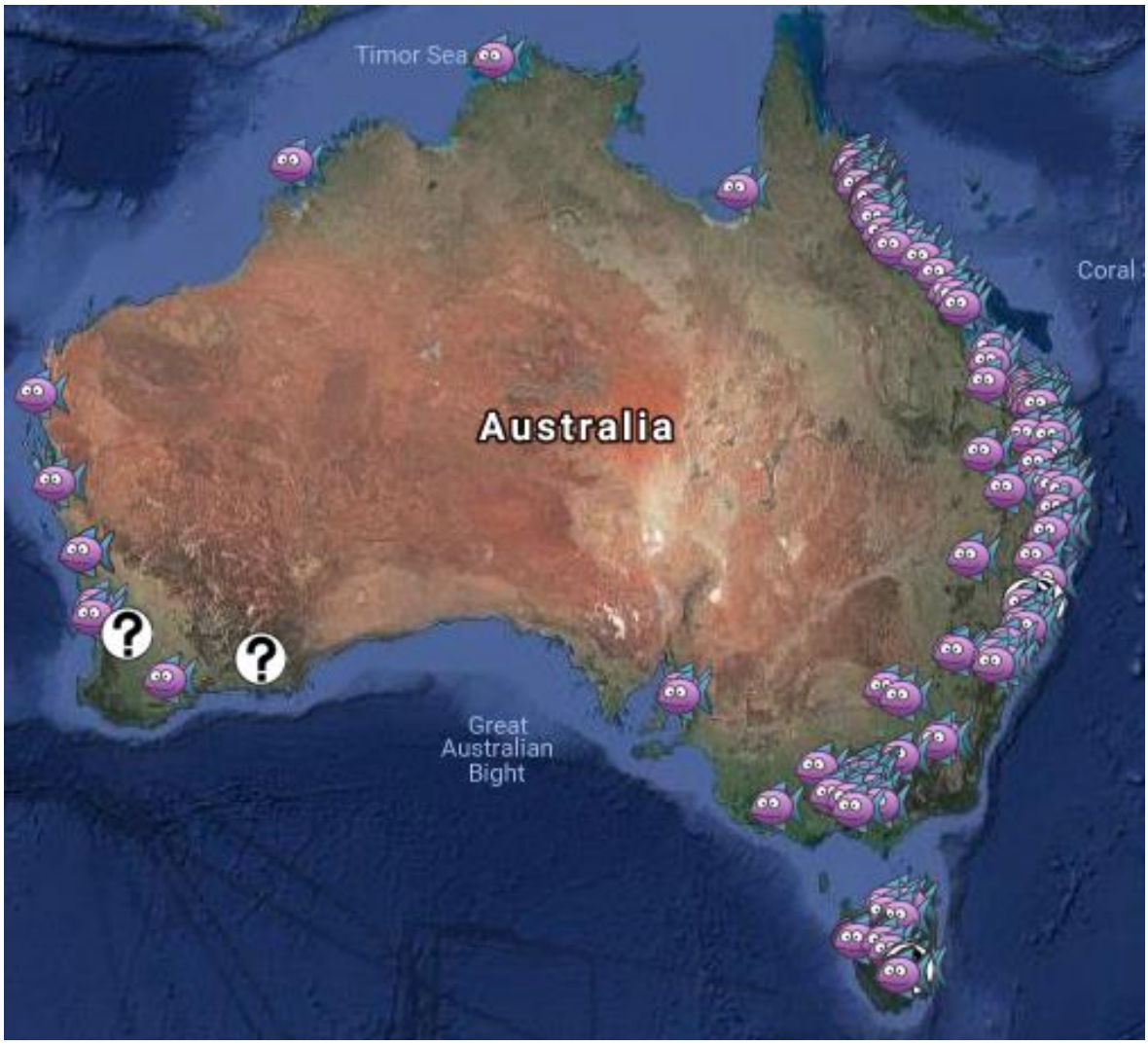
The principle role of Southern Ports is to facilitate trade through the commercial management of efficient, sustainable, safe and customer-focused ports, and to return a dividend to the Government of Western Australia. A diverse range of commodities is traded through the ports of Albany, Bunbury and Esperance along the southern and south-west coast of Western Australia.

Tasmanian Ports Corporation Pty Ltd
PO Box 478 Devonport TAS 7310
90-110 Willis Street, Launceston TAS 7250
Tel: +61 3 6421 4911 | Fax: +61 3 6421 4988
Email: secretary@tasports.com.au
Website: www.tasports.com.au
Contact: **Anthony Donald, Acting Chief Executive Officer**

The Tasmanian Ports Corporation facilitates 99% of Tasmania's interstate and international trade. Tasmania is very much an export state, with export freight usually twice that of import. Exports represent about 65% of Tasmania's freight trade.

All of the major sea ports facilitate the freight of goods in and out of the state, and Devonport and Hobart also accommodate significant numbers of passenger ships. Generally, each port has its specialties:
• Hobart – Cruise ships, Navy vessels, Antarctic supply vessels, fertilizers, metals
• Bell Bay (Launceston) – Minerals, fuels, timber, timber products, food
• Devonport – Interstate ferries, wheat grain, cement, fertilizers, fuels
• Burnie – bulk minerals, timber, timber products
• Triabunna – Woodchips, timber products

ANNEX F: List of Australian Fish and Marine Life Farms



Name	Suburb	State	ID
41 Degrees South Tasmania Salmon & Ginseng Farm	Red Hills	TAS	5a8ab
Abalone aquaculture - Southern Ocean Mariculture (SOM)	Port Fairy	VIC	7833a
Alba Aquaculture Farms - Crayfish	Wolvi	QLD	96863
Alpine Trout Farm	Piedmont	VIC	f56df
Angelakis Brothers Fish Processing	Adelaide	SA	43dc4
Aquaculture	Redgate	QLD	de1ac
Aquanas Foods - Fish Processing	Abbotsford	VIC	3096f
Aquaverde Crayfish	Carrington	QLD	fff49
Australian Bay Lobster Producers	Chinderah	NSW	c9f08
Australian Coral Coast Mariculture Pty Ltd - prawn farm	Mullett Creek	QLD	318bc
Australian Koi Farm	Bringelly	NSW	3a2ec

Name	Suburb	State	ID
Australian Native Fish	The Whiteman	NSW	33554
Australian Prawn Farms Pty Ltd	Ilbilbie	QLD	eb7ac
Australian Rainbow Trout Farm	Macclesfield	VIC	3debe
Australian Trout Exports Corporation	Murrindindi	VIC	54833
Banfield Freshwater Fish Farm	Berkshire Park	NSW	c8a44
Barramundi Discovery Centre	Karumba	QLD	84271
Barramundi Gardens	Julatten	QLD	03f8b
Blacklene Pty Ltd	Alberton	QLD	8fdcc
Blue Beef Pty Ltd	Bajool	QLD	d1126
Brisbane Valley Ostrich & Fish Farm	Esk	QLD	e3add
Bundaberg Prawn Farm Pty Ltd	Calavos	QLD	f325e
Bundy Barra Farms	Oakwood	QLD	16adb
Buxton Trout & Salmon Farm	Buxton	VIC	75147
Chazlake P/L Prawn Farm	Alberton	QLD	31d20
Chris Kwik	Damper Creek	QLD	0acbc
Condabilla Fish Farm	Crossroads	QLD	cb2a4
Cone Bay Ocean Barramundi		WA	bf2ee
Coral Coast Barramundi	Guthalungra	QLD	8e6ae
Cripps Family Fish Farm	Baxter	VIC	c845f
Daintree Saltwater Barramundi Fish Farms	Wonga	QLD	18ca0
DS Farms - Tasty Prawns	Alberton	QLD	a7a08
Eels Australia	North Isis	QLD	9b4e6
Eildon Trout Farm	Thornton	VIC	175f7
Eucumbene Trout Farm	Rocky Plain	NSW	e5f62
Fish Hatchery	Boolarra	VIC	a06ca
Fortune Enterprises Australia	Midgeree Bar	QLD	29639
Fortune Prawns	Palmers Island	NSW	16a25
Freshwater Australian Crayfish Traders Pty Ltd	Tarome	QLD	6627e
Frontier Farming Technologies	Gunalda	QLD	ff2a4
Gaden Trout Hatchery	Jindabyne	NSW	f6911
Gamlin Aquaculture	Moorland	QLD	47188
Gold Coast Marine Aquaculture - Prawn Farm	Woongoolba	QLD	b6fea
Golden Ponds	Baldivis	WA	dad62
Good Fortune Bay Fisheries	Gumlow	QLD	88c83

Name	Suburb	State	ID
Goulburn River Trout	Thornton	VIC	270e5
Hanson Fisheries	Pacific Haven	QLD	6b68c
Humpty Doo Barramundi	Middle Point	NT	38264
HUON Aquaculture	Surveyors Bay	TAS	6872b
Huon Aquaculture	Sassafras	TAS	3d65e
Huon Salmon Farm approx. location (Storm Bay)	North Bruny	TAS	f77a7
Ian and Pauline Langtree	Woodstock	QLD	fe826
Ironbark Redclaw Crayfish Farm	Wolvi	QLD	b5952
Julatten Barramundi	Julatten	QLD	e53b1
Kailis Bros Seafood - Fish Processing	Canning Vale	WA	19285
Kuranda Fish Farm	Speewah	QLD	39178
L P Dutton Trout Hatchery	Ebor	NSW	2fa97
Lindon John Josefski	Avondale	QLD	81c7f
M J & V G Jennings	Mareeba	QLD	35e5b
Mainstream Aquaculture	Werribee	VIC	54128
Mark Lee Fish Farm	Waterloo Corner	SA	fc75e
Marysville Trout Farm	Marysville	VIC	3e4b1
Melbourne Barra	Bangholme	VIC	b8fb5
Melivan Pty. Ltd.	Kurrimine Beach	QLD	d042f
Mervyn James Wake & Cecily Mariann Wake	Rosedale	QLD	1d42b
MH & AM Tooker	Cawarral	QLD	39ee5
Michael and Diane Mosch	Koah	QLD	35c34
Michael Howard	Goomboorian	QLD	40747
MJP Freshwater Aquaculture	Wolvi	QLD	e4db4
Monagold Pty Ltd	Ilbilbie	QLD	3cf62
Morton & Son	Packers Camp	QLD	0565f
Mountain Fresh Trout & Salmon Farm	Harrietville	VIC	ef7a8
Mountain Stream Fishery	Myrtle Bank	TAS	fbc0b
Murray Darling Fisheries	Euberta	NSW	158d9
Narrabri Fish Farm	Jacks Creek	NSW	0e9a0
Narrandera Fisheries Centre	Gillenbah	NSW	77293
Nor-West Seafoods	Babbage Island	WA	54f3b
Ocean Wave Seafoods P/L	Avalon	VIC	eb9e1
Pacific Reef Fisheries	Alva	QLD	e4cb6

Name	Suburb	State	ID
Paradise Prawn Farm	Alberton	QLD	ba692
PEJO Enterprises	Martyville	QLD	782da
Petuna Aquaculture	Cressy	TAS	e4621
Pipers Creek Hatchery (aka Hambly Fish Farm)	Kundabung	NSW	41141
Pond Perch Farming Pty Ltd	North Isis	QLD	0dda6
Ponderosa Prawn Farm	Yorkeys Knob	QLD	95089
Possibly part of Fortune Prawns	Palmers Island	NSW	5920a
Possibly part of Fortune Prawns	Palmers Island	NSW	181d7
Prawn Park	Steiglitz	QLD	8c2d7
Prawns North Pty Ltd	Clemant	QLD	04102
Quandamooka Oysters	Steiglitz	QLD	e7f64
Red Claw Aquatica	Beerburrum	QLD	c25d1
Redgate Fish Farm- Aquaculture	Redgate	QLD	37b38
Rhyll Trout & Bush Tucker Farm	Rhyll	VIC	5d261
Rocky Creek Redclaw	Walkamin	QLD	24c79
Rocky Point Hatchery	Steiglitz	QLD	c581e
Rocky Point Prawn Farm	Woongoolba	QLD	a6b04
Rocky Ridge Redclaw	Abington	QLD	1e41c
Rocky Water Crayfish	Greenmount	QLD	7aae5
Russell Falls Aquaculture	National Park	TAS	08818
Salmon Enterprises of Tasmania	Wayatinah	TAS	a834f
Sandpiper Agri	Promisedland	QLD	713f6
Sealord King Reef Pty Ltd	Cowley Creek	QLD	8dca8
Smithy's Crayfish Farm	Downsfield	QLD	d8163
South East Queensland Fish Pty	Luscombe	QLD	dee4f
Stephen Brett Thorburn	Witheren	QLD	95f47
Sundown Fish Farm	Koah	QLD	126f1
Sunrise Seafood	Rosedale	QLD	4cc39
Sydney Fish Market	Pyrmont	NSW	9a7bb
Tailor Made Fish Farm	Bobs Farm	NSW	ac06e
Tassal	Barretta	TAS	da0da
Tassal Dover Salmon Processing Plant	Strathblane	TAS	12b0f
Tassal Huonville Processing Plant	Huonville	TAS	edc6e
Tassal Ranelagh Hatchery	Ranelagh	TAS	ef423

Name	Suburb	State	ID
Tassal Strahan	Strahan	TAS	1ed5e
Tasty Prawns	Alberton	QLD	7f7e0
Torres Strait Trawling Company Pty Ltd	Webb	QLD	cc51f
Townsville Barra Fishing Farm	Gumlow	QLD	43761
Trudgalong Farm	Faulkland	NSW	e3e50
Tuki Trout Farm	Smeaton	VIC	cb105
Twelve Mile Creek Aqua Farm	Twelve Mile Creek	NSW	d20f2
Unknown	Tinonee	NSW	b451a
Unknown	Gloucester	NSW	515dc
Unknown	Valentine Plains	QLD	7117d
Unknown	Wellstead	WA	c5f96
Unknown	Yallabatharra	WA	ac534
Unknown	Hill River	WA	a1ad9
Unknown	Hill River	WA	24fe8
Unknown	Hill River	WA	dced4
Unknown	Hill River	WA	d1f81
Unknown	Goodwood Island	NSW	1ee1d
Unknown	Palmers Island	NSW	d12c7
Unknown	Palmers Island	NSW	e1aca
Unknown	Palmers Island	NSW	c9778
Unknown	Central Mangrove	NSW	36c1a
Unknown	Bulahdelah	NSW	eb347
Unknown	Bulahdelah	NSW	fe84f
Unknown	Bulahdelah	NSW	3b200
Unknown	Blayney	NSW	e80db
Unknown	Blayney	NSW	7e8ad
Unknown	Rowella	TAS	a0322
Unknown	Clovass	NSW	aed85
Unknown	Maria Creeks	QLD	7e655
Unknown	New Harbourline	QLD	f036e
Unknown	New Harbourline	QLD	96ae5
Unknown	Sandy Pocket	QLD	e9731
Unknown	Cowley	QLD	af4f3
Unknown	Mourilyan Harbour	QLD	3b279

Name	Suburb	State	ID
Unknown	Wolvi	QLD	db000
Unknown	Campwin Beach	QLD	d995f
Unknown	Pacific Haven	QLD	d198d
Unknown	Mount Peter	QLD	8e856
Unknown	Wongabel	QLD	69f93
Unknown	Elliott Heads	QLD	999f2
Unknown	Woongoolba	QLD	474f4
Unknown (poss aquaculture)	Marysville	VIC	e040c
Unknown - fish farm?	Flowerpot	TAS	e88a1
Unknown aquaculture	Bringalily	QLD	f7268
Unknown aquaculture	Baldivis	WA	49fc3
Unknown Aquaculture	Damper Creek	QLD	6bb11
Unknown Aquaculture	Damper Creek	QLD	c7234
Unknown Aquaculture	Damper Creek	QLD	cd4da
Unknown Aquaculture	Macknade	QLD	aecd1
Unknown Aquaculture Hatchery	Abington	QLD	2c492
Unknown aquaculture?	Merivale	WA	b8b60
Unknown barramundi hatchery?	Bloomsbury	QLD	71d28
Unknown fish farm	Surveyors Bay	TAS	bf8b5
Unknown fish farm	Nubeena	TAS	7bef8
Unknown fish farm	Nubeena	TAS	70adc
Unknown fish farm	Electrona	TAS	b90d5
Unknown fish farm	Coningham	TAS	50781
Unknown fish farm	Oyster Cove	TAS	adef2
Unknown fish farm	North Bruny	TAS	52381
Unknown fish farm	Flowerpot	TAS	d9157
Unknown fish farm	Surveyors Bay	TAS	097f6
Unknown fish farm	Dover	TAS	f0fa1
Unknown fish farm	Surveyors Bay	TAS	7fd44
Unknown fish farm	Surveyors Bay	TAS	3e95e
Unknown fish farm	Port Huon	TAS	2d3ab
Unknown fish farm	Cairns Bay	TAS	7ab2e
Unknown fish farm	Strathblane	TAS	92f5a
Unknown fish farm	Strathblane	TAS	99900

Name	Suburb	State	ID
Unknown Fish Farm	Police Point	TAS	98142
Unknown fishery?	Williams	WA	013f1
Unknown salmon farm	Southwest	TAS	d5f61
Unknown salmon farm	Southwest	TAS	a0258
Unknown salmon farm	Southwest	TAS	242b5
Unknown salmon farm	Southwest	TAS	4ad63
Unknown salmon farm	Southwest	TAS	5a0f7
Unknown salmon farm	Strahan	TAS	394e1
Unknown salmon farm	Southwest	TAS	de812
Unknown salmon farm	Strahan	TAS	78dba
Whitsunday Crayfish Pty Ltd?	Bloomsbury	QLD	f824e
Wilhelmina Trout Farm	Murrindindi	VIC	486c6
Yabby Farm	Bulahdelah	NSW	e627d
Yarra Valley Salmon / Caviar	Rubicon	VIC	61c9e
Z & L Vermeer	Cooroibah	QLD	97922

Source: https://www.aussiefarms.org.au/facilities/food/fish

ANNEX G: Cargo and Containers

All Containerised and breakbulk cargo Measured in Mass Tonnes	2014/2015		
	Imports	**Exports**	**Total**
New South Wales			
Eden (Sydney Ports)	824	0	824
Newcastle Port Corporation	217,484	167,361	384,845
Port Kembla (NSW Ports)	848,824	750,370	1,599,194
Sydney Harbour (Sydney Ports)	882	0	882
New South Wales total	**1,068,014**	**917,731**	**1,985,745**
Queensland			
Bundaberg (Gladstone Ports)	0	0	0
Cairns (Ports North)	53,891	164,361	218,252
Gladstone (Gladstone Ports)	69,472	565,080	634,552
Karumba (Ports North)	1,034	4,986	6,020
Lucinda (Townsville)	2,780	8,447	11,227
Mackay (NQBP)	20,366	0	20,366
Port Alma (Rockhampton) (Gladstone Ports)	35,991	6,417	42,408
Port of Brisbane Pty Ltd	5,239,970	4,900,141	10,140,111
Quintell Beach (Ports North)	1,473	0	1,473
Thursday Island (Ports North)	58,160	21,902	80,062
Townsville (Townsville)	404,447	980,743	1,385,190
Weipa (NQBP)	37,562	9,517	47,079
Queensland total	**5,925,146**	**6,661,594**	**12,586,740**

All Containerised and breakbulk cargo Measured in Mass Tonnes *(continued)*	2014/2015		
	Imports	**Exports**	**Total**
Northern Territory			
Darwin Port Corporation	724,030	129,533	853,563
Northern Territory total	**724,030**	**129,533**	**853,563**
South Australia			
Klein Point (Flinders)	0	0	0
Port Adelaide (Flinders)	1,674,465	2,984,549	4,659,014
Port Giles (Flinders)	0	0	0
Port Lincoln (Flinders)	0	0	0
Port Pirie (Flinders)	16,301	23,523	39,824
Thevenard (Flinders)	0	0	0
Wallaroo (Flinders)	0	0	0
South Australia total	**1,690,766**	**3,008,072**	**4,698,838**
Tasmania			
Bell Bay (TasPorts)	19,905	67,334	87,239
Burnie (TasPorts)	1,157,009	1,524,825	2,681,834
Devonport (TasPorts)	1,145,846	874,344	2,020,190
Hobart (TasPorts)	1,971	3,206	5,177
Tasmania total	**2,324,731**	**2,469,709**	**4,794,440**
Victoria			
Geelong Port (Patrick)	299,803	1,377,022	1,676,825
Port of Hastings (Patrick)	26,055	477	26,532
Port of Portland	0	0	0
Victoria total	**325,858**	**1,377,499**	**1,703,357**

All Containerised and breakbulk cargo Measured in Mass Tonnes *(continued)*	2014/2015		
	Imports	**Exports**	**Total**
Western Australia			
Broome Port Authority	63,348	85,955	149,303
Bunbury Port Authority	4,184	26,122	30,306
Dampier Port Authority	205,204	599,798	805,002
Esperance Ports	118	0	118
Fremantle Ports	402,858	479,827	882,685
Geraldton Port Authority	822	0	822
Port Hedland Port Authority	364,293	5,772	370,065
Western Australia total	1,040,827	1,197,474	2,238,301
Total	**13,099,372**	**15,761,612**	**28,860,984**

Total number of commercial vessel calls within the Containers category	2014/2015

New South Wales	
Newcastle Port Corporation	17
Port Kembla (NSW Ports)	4
Port Botany (NSW Ports)	1,110
New South Wales total	1,131
Victoria	
Geelong Port (Patrick)	0
Port of Portland	0
Victoria total	0
Queensland	
Port of Brisbane Pty Ltd	979
Bundaberg (Gladstone Ports)	0
Gladstone (Gladstone Ports)	40
Port Alma (Rockhampton) (Gladstone Ports)	33
Townsville (Townsville)	132
Queensland total	1,184
South Australia	
Port Adelaide (Flinders)	335
Klein Point (Flinders)	0
Port Giles (Flinders)	0
Port Lincoln (Flinders)	0
Port Pirie (Flinders)	0
Thevenard (Flinders)	0
Wallaroo (Flinders)	0
South Australia total	335

Total number of commercial vessel calls within the Containers category *(continued)*	2014/2015
Western Australia	
Broome Port Authority	0
Esperance Ports	20
Fremantle Ports	511
Western Australia total	531
Tasmania	
Burnie (TasPorts)	306
Devonport (TasPorts)	314
Hobart (TasPorts)	2
Bell Bay (TasPorts)	23
Tasmania total	645
Northern Territory	
Darwin Port Corporation	60
Northern Territory total	**60**
Total	**3,886**

Source: http://www.portsaustralia.com.au/aus-ports-industry/trade-statistics

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