SOUTH AUSTRALIAN **Food**

Market Summary of South Australian Seafood

February 2009

The following report details South Australia's key seafood markets and the competitive position of South Australian products in those markets. Consumer trends driving seafood purchase decisions are also discussed, along with potential opportunites for future market development.

Data in this report is from sources including PIRSA Food Scorecard, ABARE Fisheries statistics, ABS International Trade Statistics, PIRSA Economic Performance Indicator Reports and the United Nations Comtrade database. Additional references are included in the report.

Government of South Australia

a South Australian Food Centre
Regency International Centre, TAFE SA
Days Rd (Main Entrance)
Regency Park, SA 5010

p +61 8 8348 4095
f +61 8 8348 2484
e safoodcentre@saugov.sa.gov.au
w www.safoodcentre.com.au

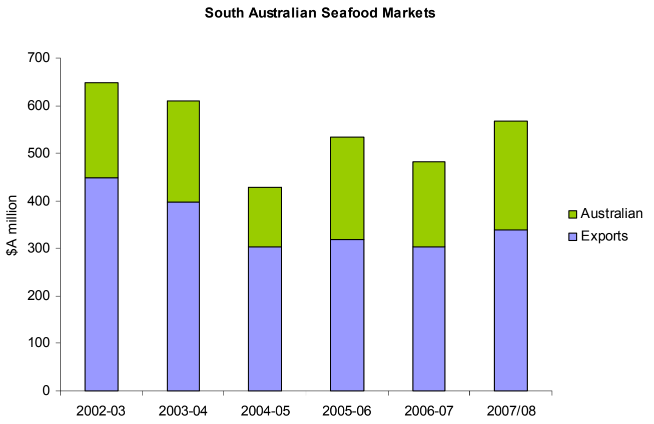
Markets for SA Seafood

A high proportion of South Australian seafood is exported, with approximately $338 million worth of seafood sales to export markets in 2007/08. Much of the South Australian production of tuna, lobsters and abalone are exported. In previous years, prawns have also been largely exported, but over the last three years they have been increasingly sold in Australia. Increasing amounts of other aquaculture products are being exported, but the majority are still sold on the domestic market. Most other major products are largely sold in the Australian domestic market.

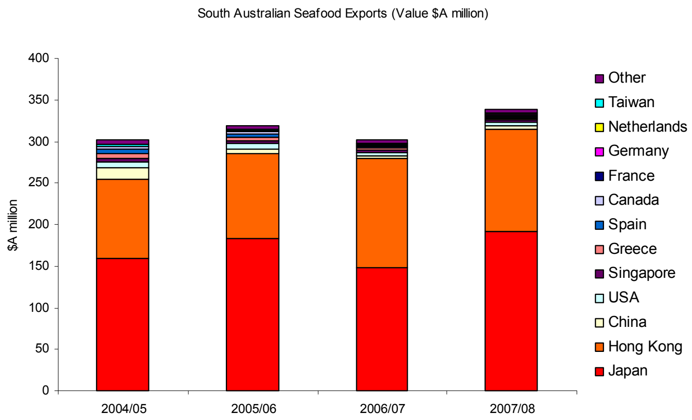
SA Seafood Markets in 2007/08[1]

Japan	$192 million
Interstate Australia (Net)	$163 million [2]
Hong Kong	$124 million
South Australia	$ 66 million [2]
Other Export	$ 23 million

South Australia's largest value seafood export markets are Japan and Hong Kong. Smaller amounts are exported to a wide range of markets around the world.



PIRSA Food Scorecard



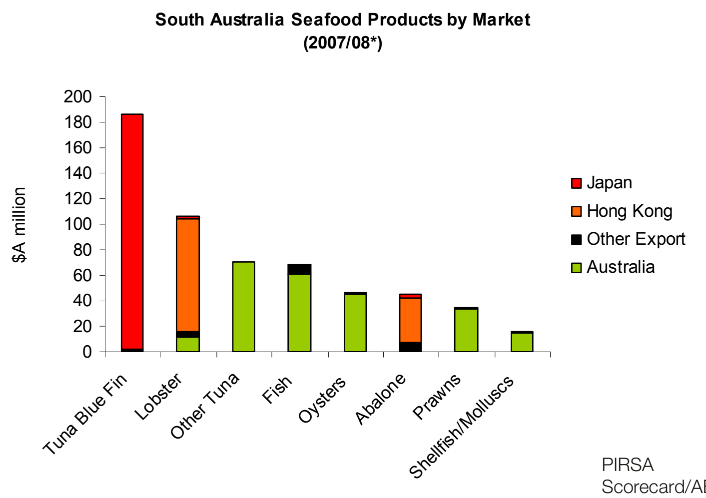
ABS Trade

[1] Final 2007/08 Scorecard to be released late 2008. Figures are provisional. Complete export values included on page 23
[2] Approximation from 2007/08 PIRSA Food Scorecard

Markets for Major SA Seafood Products

In 2007/08 over 95% of South Australian Seafood products were sold in either Australia, Japan or Hong Kong. For most products, sales are currently concentrated in a single market.

South Australia's single largest value Seafood product, Bluefin Tuna, is sold almost exlcusively in Japan. Five years ago, lobsters were sent direct to both Hong Kong and China but are now mainly sent via Hong Kong, with small amounts to other markets. Prawns have seen a shift from a large export focus to markets including Japan and Europe, but are now largely sold in Australia. Oysters and Mussels, while showing increases in exports in recent years are still largely sold in Australia. Abalone is mainly exported, with Hong Kong the largest market for SA Abalone. Abalone are also sold in smaller amounts to Japan and a number of other export markets. Canned tuna is almost entirely sold domestically. Fish and other fisheries products (crabs, squid, etc.) are primarily sold domestically. Fish exports are growing and sold to a wide range of markets, with growth in recent years occuring to Europe. Australian Sardines are largely sold as fish feed domestically and not consumed as human food so are not included in the Seafood total.



PIRSA Scorecard/ABS Trade

* Provisional 2007/08 Scorecard data

Australian Domestic Market

Australia's consumption of seafood is showing strong growth, but remains lower than many major markets

Australian production of seafood was worth $2.18 billion in 2006/07, with approximately half of this total exported.

The total value of Australian Seafood Imports ($1.128 billion, 2007/08) has increased in recent years and now exceeds Australian Seafood Exports ($992 million). Although imports are slightly higher in value than exports, the total volume of imports (198,000 tonnes) is more than four times that of exports (45,000 tonnes), which reflects the higher unit values of Australian export products. Import volume has only increased 5% in the last 5 years, but increasing prices has seen the total value increase 25%. Total volume of seafood consumed has fluctuated. The proportion of South Australian seafood in the market remains small, but has risen with increasing aquaculture production, and a reduction in the exports of selected SA seafood products.

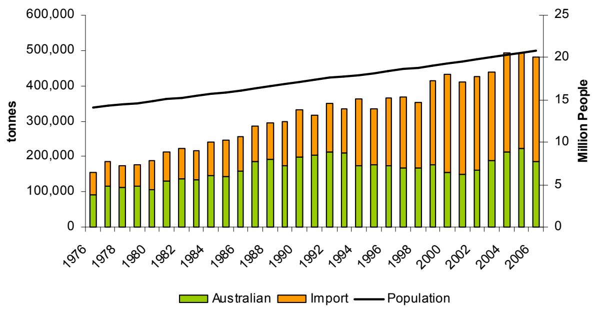
Australian consumption of seafood has grown strongly over the last 20 years, with most of the growth occurring through seafood imports. Australian yearly per capita expenditure on seafood has also increased, particularly in recent years. Despite this, Australian per capita expenditure on Seafood remains much lower than many of the world's largest seafood markets such as Japan, much of Europe (e.g. Spain, France, Italy, Greece) and Hong Kong.

Major seafood imports to Australia include frozen and processed fish, prawns, canned tuna, squid, scallops and other shellfish. The imports of lobsters, abalone and oysters are small in comparison with Australian production.

Many of South Australia's highest priced (and high value) seafood products (Southern Bluefin Tuna, Lobsters, Abalone) are primarily exported. The Australian domestic market is the major point of sale for most other South Australian Seafood products with wholesale value of interstate sales estimated at $163 million and SA sales $66 million*.

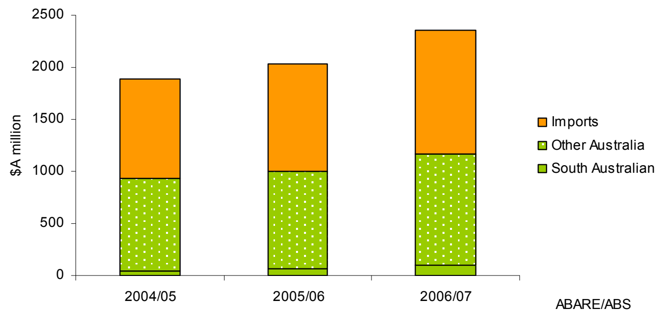
The highest value SA products sold on the domestic market include processed Tuna, Oysters, Prawns and aquaculture Marine Fish, Crabs, Squid, Snapper, King George Whiting, Mussels, and Barramundi.

Australian Consumption of Fisheries Products (1976-2006)



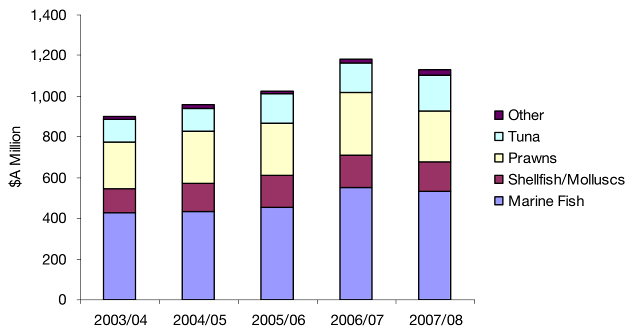
FAO Fishstat

Australian Seafood Consumption
(Wholesale $A million)



ABARE/ABS

Australian Seafood Imports
(CIF $A million)



ABS Trade

Consumer Trends

This report seeks to give an overview of some of the consumer trends in relation to food. The mega-trends in food are

- Convenience
- Health
- Enjoyment

Furthermore, customers are increasing looking at credence attributes of their food products, attributes that are not identifiable by the look, feel or taste of the actual food. These include ethical production, natural ingredients, environmental impact and sustainability. Some challenges and opportunities within these consumer trends are examined.

Eating for Life

There is strong Australian interest in health and the role of food, with personal weight loss remaining an ever-popular topic across all media. The issue of community food and health issues have increased in media profile with national obesity levels, junk food advertising to children, and food health labelling among recent public policy issues. Equally, worldwide there is considerable consumer interest in health and wellbeing and the important role that food plays.

Seafood is well placed to capitalise on the consumer interest in health. There is extensive evidence about the health benefits of seafood.

Consumers recognise seafood, particularly fish, as a healthy product. In contrast, the red meat industry has been seeking to assure customers about the health credentials of red meat, with campaigns including "Red Meat: We were meant to eat it". In much the same way as seafood, fresh fruit and vegetables are perceived as healthy food choices. The promotion of the 2&5 a day fruit and vegetable program has built on the health attributes of fruit and vegetables and sought to establish a benchmark for regular consumption of horticultural products. While health considerations may be an important driver for consuming more seafood in preference to other protein sources, overall, specific health attributes are not necessarily primary considerations for Australian consumers in choosing between similar seafood products.

In addition to seafood products themselves, there is currently a large marketing push for the health benefits associated with fish, specifically fish oil and omega-3 enriched products.

Potential health hazards associated with the consumption of fish contaminated with heavy metals such as mercury have received world-wide publicity. Specific warnings about consumption in selected markets have been issued, particularly for pregnant women to minimise consumption of seafood. Actual contamination is most likely to occur in fish from contaminated waters and carnivorous fish, where heavy metals are concentrated through the food chain. Seafood Services report that there have been no reported cases of mercury poisoning in Australia as a result of seafood consumption. Awareness of such issues and the opportunities to promote the clean waters in which South Australian wild-catch and aquaculture products are produced, could potentially sustain a competitive advantage in selected markets.

Further Reading

What's so healthy about seafood?
Seafood Consumption in Australia & Drivers of Prawns Purchase
Consumers' food choice and quality perception
Relationship between attitudes towards healthy eating and dietary behaviour, lifestyle and demographic factors in a representative sample of Irish adults
The Seafood "Dilemma"—A Way Forward
Current issues in the understanding of consumer food choice
Factors influencing the consumption of seafood among young children in Perth: a qualitative study
Export Potential for Organics

Easy, Quick, Value, Now!

Despite a rising consumption of seafood, Australia's per capita consumption remains low by world standards.

Australian Seafood competes with other protein sources, such as chicken, beef, lamb and pork as well as imported seafood. Fresh Seafood is often regarded by consumers as being expensive in comparison with other protein sources.

Of the wholesale value of fish sold in Australia, approximately ¼ is Salmon, ¼ imported frozen fillets and ¼ canned fish. The remainder of sales are a range of Australian caught and grown fish, plus imported species. Supermarkets prefer supply of product to be regular and consistent, which is difficult to achieve with many wild caught fish species. In the domestic retail market, salmon is by far the largest value fish species sold. Aquaculture salmon provides a regular supply of consistent product with attractive colour, good texture, and manageable shelf life and is well received by consumers. Developing the Australian market for Australian retail fresh fish products will need to consider supply capability, convenience and shelf life of fillets.

To increase the consumption and value of Australian fish, consumer friendly fish products are required to effectively compete with premium red meat. With a serve of fish typically being less weight than a red meat serve, pricing and marketing that draw focus to the cost per portion, rather than the per kilo price, may make fish purchases more attractive for consumers.

Food Patriotism

Surveys of Australian consumers indicate that the place of production is a major factor in the consumer preference for seafood. Improved availability of locally grown/caught seafood is amongst the greatest factors likely to encourage greater consumption of seafood. The reasons for preferences towards purchasing locally produced products may vary, including perceptions of quality, freshness, safety and other considerations including supporting local producers. Price is always a consideration, but consumers are often willing to pay a premium for high quality local products. Consumers can only choose to buy local product if they know it is local. Branding and/or labelling as well as promotion are vital for consumers to be aware of the origin of products.

An emerging market is that of tourists seeking to experience the high quality food and beverages of the regions they are visiting. These typically high end consumers are known as culinary tourists. For culinary tourists, food and beverage experiences form a significant component of their travel and they have a strong interest and understanding of food and wine. These consumers seek to understand more about the produce and production of different regions and have the means to experience the premium local produce. While South Australia's location may be an impediment to international visitors travelling to South Australia, interstate and even local tourists are a substantial market and often prepared to spend more whilst on holiday than they are at home. With a number of South Australian regions seeking to attract tourists, the ability for these visitors to be able to purchase local produce in restaurants is valuable, to promote the region, but also as a growing high value market.

Further Reading

Seafood Consumption in Australia & Drivers of Prawns Purchase
South Australia Wine and Food
Buy SA It's better for you
Stimulating Domestic Tourism

Key Products

Prawns

Major Markets

South Australia's wild catch prawn production has remained reasonably stable, averaging just over 2000 tonnes per annum for the last 15 years. In recent years the market for SA prawns has changed. In 2004/05 nearly 70% of SA prawns were exported and export value was nearly $28 million, with Japan, Spain and Greece being the major markets. Since then, exports to these markets have dropped significantly to around $2 million in 2007/08. The high value of the Australian dollar over recent years, increased competition from cheaper prawns and changing relationships in export markets all contributed to the decline. Australian domestic sales now are the largest market for SA Prawns. Domestic prices are seasonal, but average nominal prices for SA prawns have risen slightly in recent years.

Sales of South Australian Prawns have shifted from Export to the Australian Domestic Market

With decreasing Australian and South Australian exports, there are additional Australian prawns available in the domestic market. In 2007, quarantine measures for importing prawns were revised which restricted some existing importers of unprocessed and uncooked prawns. The impact of this on the Australian market appears to have been limited, with 2007/08 total imports only slightly lower than the previous year.

Competitive Position

Total volume of Australian prawn imports has more than doubled in the last six years, while the price of imported prawns has decreased during this time. The high value of the Australian dollar in recent years made Australia a particularly attractive market for international producers. This has changed recently, with the value of the dollar dropping significantly in late 2008.

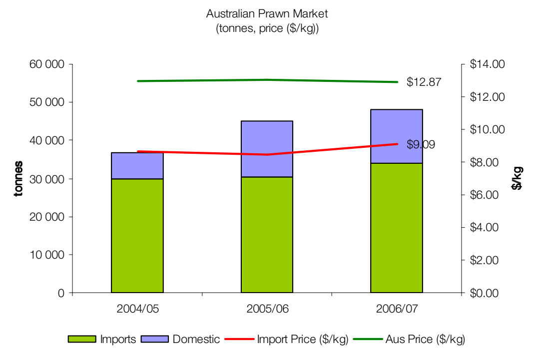
Australian prawn production has decreased in recent years, mainly due to a reduced production in Queensland. Prawn aquaculture produces 16% of Australia's prawns. South Australian prawns account for less than 5% of the Australian domestic market.

In the Australian market, SA's Western King Prawns are considered a high quality prawn and sell at a price premium, higher than the Australian average and around twice the price of imported prawns. However, the increasing volume of prawns in the Australian market does place price pressure on the prawn market.

Export Markets

The largest world markets for prawns and shrimp include USA, Japan, Spain and France. The highest trade prices for frozen prawns are seen in two of Australia's traditional markets, Spain and Japan. These are both high volume markets and are supplied by many countries. In Japan the trade price received for Australian prawns is amongst the highest of all suppliers, with South Australia higher than the national average. A number of suppliers to Spain receive higher average price than is received for Australian prawns, including those from Morocco and Tunisia.

Among international prawn and shrimp producers, Australia is only small, accounting for just 0.3% of world production. International production of prawns has shown strong growth in recent years, largely due to increased aquaculture production of prawns. Rapid growth in prawn aquaculture sees it now accounting for nearly 50% of world prawn production, up from 25% 8 years ago. Major prawn producers include China, Thailand, Vietnam, India, and Indonesia.



ABARE/ABS Trade

ABARE

Oysters

Major Markets

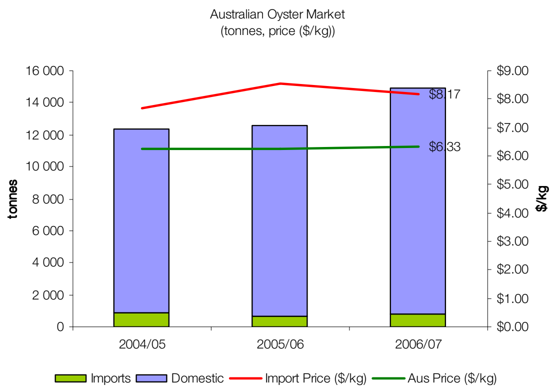
South Australian oyster production has shown strong growth in recent years. Australian Oyster production has increased overall, mainly due to the increase in South Australian production. In 2006/07, South Australia produced over 50% of Australia's Oysters.

98% of Australian Oyster production is for the domestic market. A relatively small amount (837 tonnes, $7 million) of oysters are imported into Australia and account for 6% of the market. South Australia supplies over half of the Australian market. Imports have remained stable over the last 3 years. South Australian Oyster exports are growing from a small base to Asian markets including Hong Kong and Singapore, which are among the highest average price import markets in the world. Australian exports receive a premium price in these markets. Other high price oyster suppliers to these markets include Japan and Korea.

Sales of South Australian Oysters and Mussels are showing strong growth in recent years

Competitive Position

World Oyster production is predominantly aquaculture and has grown approximately 50% over the last 10 years. World trade of oysters is quite low compared with total production. By way of comparison, South Australia produces more Oysters than any single country imports. Despite producing over 80% of all oysters, China accounts for only 5% of world exports. The largest exporters include France, Korea and USA, with the largest import markets including Italy, Hong Kong, and USA. Australia is amongst the highest average price import markets.



ABARE/ABS Trade

Mussels

Major Markets

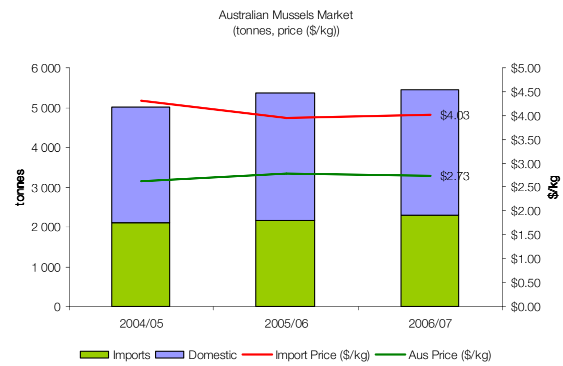
While Australian aquaculture production of Mussels has remained steady for the last 3 years, South Australian production has nearly tripled in the last two years, increasing SA's percentage of national production to 33%.

The Australian Mussel market is growing, with a mix of domestic production and imports. Australian production accounts for 58% of the market, with New Zealand being the major exporter into Australia and with small amounts supplied from USA and China. Exports grew strongly in 2007/08 from a small base.

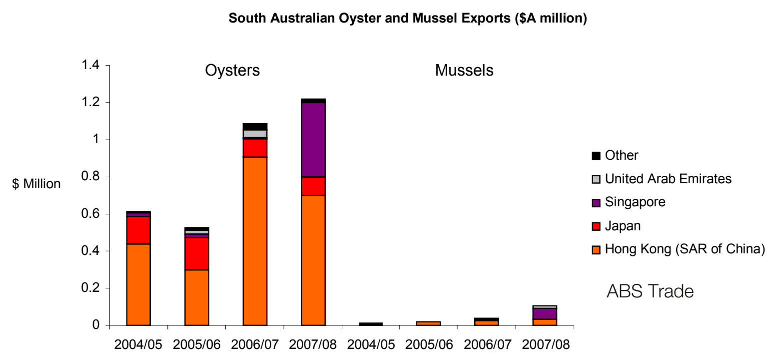
Competitive Position

International production of Mussels has shown steady growth for the last 8 years. Australia is only a very small producer. Major producers include China, Thailand, Spain and Chile. New Zealand is also a major producer (nearly 100,000 tonnes).

Netherlands and New Zealand are the world's largest mussel exporters. Major markets for mussels include Belgium, France and USA. Australia currently exports only a small amount of mussels.



ABARE/ABS Trade



ABS Trade

Processed Tuna

Major Markets

Canned and processed tuna is produced in Port Lincoln and is the single largest value SA seafood product sold domestically. A range of tuna products are produced including flavoured and convenience packs.

Australian production of non-bluefin tuna includes yellowfin, bigeye and albacore tuna. Processed tuna is produced from imported and Australian tuna.

Competitive Position

Australia imports a large amount of tuna ($A177m), primarily canned tuna from Thailand. The volume of Tuna has increased steadily in recent years, but increasing prices have seen the value of canned tuna imports grow rapidly. Average imported traded price of canned Tuna has increased in recent years, but at approximately $4.50/kg, remains a fraction of the traded price of Bluefin Tuna ($18/kg).

Other Seafood

Production

In addition to the Tuna and Sardine fish industries, the highest value South Australian produced marine fisheries products include King George and Yellowfin whiting, snapper, garfish, Australian herring (tommy ruff) and shark. Major non-fish species include crabs, which have grown strongly in price and total value, calamari and mud cockles. Quantity of catch has declined overall, particularly in King George whiting and Australian herring, but increasing unit prices have seen total value of the sector remain relatively stable.

SA aquaculture production of finfish has grown quickly in the last eight years, to now be an equivalent value to wild caught fish. Species include yellowtail kingfish, barramundi, mulloway, snapper, Murray cod and golden perch.

Total Australian fish production has shown a large decline in each of the last two years, with decreases seen across a wide range of species including Flathead, Ling, Mullet, Orange roughy, Sharks and the biggest decrease in the Other category. Similar to South Australia, increasing prices saw the total value of this category rise in 2006/07.

Australian aquaculture of fish has seen a large increase in volume and value. The largest growth has been in Tasmanian production of Salmon and Trout which is now Australia's single largest value seafood species.

Across all species world marine capture fish production is declining. Although still small compared with wild catch, marine fish aquaculture is showing strong year on year growth.

Fish and Other Seafood - Australia

Most Australian produced fish are consumed domestically. Tasmanian produced salmon and trout is now Australia's largest value seafood product, with the majority sold domestically and representing about ¼ of all Australian fish sales. Australia imports a large amount of frozen seafood, including $228 m worth of frozen fish fillets (2006/07), plus other frozen seafood products including squid, scallops and octopus. Fish imports have grown strongly over the last 5 years, with strong growth in frozen fillets, the highest value import. Major suppliers include New Zealand, Vietnam and Thailand. Imports are generally lower price than most Australian species.

Australian Sardines and Blue Mackerel

Major Markets

The SA Sardine fishery is Australia's largest volume fishery. 2006/07 saw an increase in sardine production, albeit still lower than the peak in 2004/05. South Australia produces approximately 90% of Australia's sardines.

The primary market for SA Sardine production is not directly as human food, but as food stock for aquaculture. Small amounts are sold for bait and for human consumption. Australia imports over $US 21 million worth of processed sardines with a traded price of just over $US 4/kg.

A potentially valuable new Australian and South Australian blue mackerel fishery has also been identified, with tens of thousands of tonnes of fish potentially able to be caught a year. Until recently little was known about blue mackerel in Australia with resources fished at low levels, mainly for bait. A new harvest strategy, based on the project's findings, is being established for the fishery. Europe has an existing market for a closely related species.

Competitive Position

World production of small pelagic fish (herrings, sardines, anchovies) has fluctuated, with a decrease in 2006 largely due to a decrease in Peru's anchovy catch. Australia accounts for less than 0.2% of world production.

Although world trade in fresh and frozen sardines totals more than $US330 million, the price of fresh and frozen sardines is low. Major markets including Russia and Côte d'Ivoire each import approximately $US 50 million at approximately $0.50/kg. Amongst major markets, Malaysia has the highest average price at $1.21/kg.

Trade in processed sardines is higher at nearly $US 600 million. Per kilo prices are also higher, at just over $4/kg in major markets including France, Australia and Italy.

In addition to fresh, frozen and preserved products, other products produced from small pelagic species include fish meal and oil. Traded value of fish meal is typically just over $US 1.00/kg.

Japan

2007 Japan Imports	Total ($US m)	5 year growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA % of Aus Exports	SA Exports ($A m)
Bluefin Tuna	384.2	-2%	153.3	40%	40%	99%	100%	185
Lobster	167.9	-20%	43.1	26%	2%	3%	6%	3
Prawns	2264.6	-11%	28.8	1%	0	0%	0%	0
Molluscs/Abalone	816.1	11%	23.5	3%	0.5%	8%	14%	2.5
Fish	6069.5	-1%	188.6	3%			3%	0.2
Seafood	**12768.4**	**-4%**	**295.1**	**2%**	**1%**	**57%**	**60%**	**192**

UN Comtrade, ABS Trade

Japan is now the world's second largest single seafood importer, having recently been overtaken by the USA. Japan is a premium market for many seafood products.

Per capita consumption and expenditure of seafood in Japan has seen a decline, with younger Japanese consumers increasing consumption of meat and a western-style diet. Unlike other major world markets such as Europe, USA or China, Japanese seafood imports have declined in recent years. In addition, domestic seafood catches have also been declining.

Despite declines in total value and volume sold in the Japanese domestic market, Japan remains a high priced market for many seafood products. Japan is a discerning market, with a strong interest in food integrity and safety.

Japan is South Australia's largest seafood export market led by Southern Bluefin Tuna exports

Japan is South Australia's largest, and Australia's second largest market for Seafood exports. Japan has been an important market for many years, for a range of products including Southern Bluefin Tuna, Prawns, Abalone and Lobster. Southern Bluefin Tuna is SA's major export to the market and recent yearly fluctuations in South Australian exports to Japan relate to both changes in volume and price of Southern Bluefin Tuna in the market.

Japan has historically been the largest and highest price market for South Australian prawn exports but in recent years exports have seen a sharp decline.

The volume of SA lobster exports to Japan has declined in recent years, but increasing prices have seen the value remain quite stable. Japan remains an important market for Australian lobster exports. Abalone exports to Japan have decreased for the last two years.

Competitive Position

Japan remains among one of the world's largest seafood importers and despite recent declines, per capita expenditure on seafood also remains amongst the world's highest.

South Australian seafood is generally high priced in comparison with other world seafood suppliers. Markets that appreciate and are both prepared and able to pay for the premium product are naturally of interest to South Australian suppliers.

Import prices to Japan remain amongst the highest in the world for Bluefin Tuna, but also for other traditional SA exports include lobsters and prawns. Direct comparisons with other fish imports through Comtrade data is more difficult due to differences in species produced around the world, but overall Japanese fish import prices are higher than most other seafood importing countries.

Further Reading

Japan: Food Integrity in Japan - Opportunities for Victorian food products (2005)

Key Products

Southern Bluefin Tuna

Major Markets

Tuna is South Australia's largest seafood industry and largest aquaculture industry. From 2003/04 to 2006/07 total tuna production value decreased. 2007/08 saw an increase in production volume and export value.

South Australia remains an important supplier of Bluefin Tuna and Japan is by far the largest market for Bluefin Tuna (which includes Northern, Southern and Pacific tuna).

Competitive Position

International aquaculture production of Tuna has increased in recent years, with increased competitors in the Japanese market. Despite the increase in world production, Australia remains a large producer by world standards (approximately 40% of production by FAO Statistics). Bluefin Tuna aquaculture is currently dependent on capture of wild tuna making production subject to stock availability and quotas. There is strong interest in Bluefin Tuna stocks, with Atlantic Bluefin Tuna stocks in particular, reported to be over-fished.

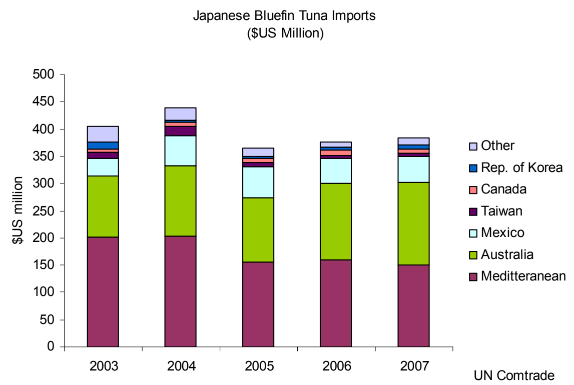
South Australian Tuna exports are predominantly to Japan. From 2004 to 2007, total Japanese imports of all Bluefin Tunas decreased each year. Competitors in the market include Spain, Croatia, Mexico and Turkey. Mediterranean suppliers of Bluefin tuna achieve a slight premium traded price, although direct comparisons are difficult as Northern Bluefin is often traded as fillets, and Southern Bluefin as whole fish. Northern Bluefin Tuna are a larger fish and subsequently harder to transport whole. Following a number of years of declining prices, in 2007/08 South Australian exports saw a large increase in volume, a slight increase in price and a large increase in total value, from $140m to over $190m. With such a large reliance on a single market, the SA industry is susceptible to changes in market conditions.

Japan is by far the largest market for imported Bluefin tuna ($US 384m, 21,000 tonnes, 85% of all imports). Japan is also a large fisher of Bluefin tunas, with FAO statistics reporting catches of just under 10,000 tonnes, although actual catches have in the past been much higher. Japanese catches of Bluefin tuna have been reducing, with decreasing fish stocks and stricter quotas.

Some other markets pay comparable traded prices for Tuna, including USA and Korea, albeit in much smaller markets (USA $US 22m, Korea $US 13m and Hong Kong $US 3m). The major suppliers to USA are Mexico, Spain and Canada, with Australia supplying less than $1million worth in 2007. Korea imports Bluefin Tuna from a wide range of suppliers. Media reports indicate China is a growing market for Sushi and Blue fin tuna, although this is not currently evident in Comtrade statistics.

Further Reading

Tuna Market Report
Japan's Sacred Bluefin, Loved Too Much
Cagey Business



Consumer Trends

The world loves Japanese food

While Japanese consumption of seafood is not increasing, the world wide consumption of Japanese style food has spread across the globe. Where sushi was considered extremely exotic and foreign only a few years ago, sushi bars are common and sushi is part of regular food consumption in Australia and across the cities of the developed world. Growth in Japanese restaurants has also been acute in growing economies, such as Russia, China and India.

Numerous media reports have focused on the increasing pressure sushi consumption is having on fish stocks, particularly Atlantic Bluefin Tuna. Media reports have highlighted that increasing scarcity and high prices of Bluefin tuna are causing difficulties for Japanese sushi restaurants.

Further Reading

The "Maguroeconomics" of tuna, the grand champion of fish cuisine
Sushi, Russia's new caviar
Sushi: no longer just a fashion statement

Hong Kong

2007 Hong Kong Imports	Total ($US m)	5 year growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA % of Aus Exports	SA Exports ($A m)
Lobster	222.9	32%	100.4	45%	17%	93%	37%	88
Prawns	153.3	-4%	4.6	3%	0%	3%	1%	0.1
Molluscs/Abalone	514.2	87%	65.1	13%	4.5%	76%	35%	35
Fish	708.4	18%	11.4	2%			0.2%	0.1
Seafood	2223.9	26%	250.5	11%	3%	36%	28%	124

UN Comtrade, ABS Trade

Hong Kong is a large market for South Australian and Australian Seafood. South Australian exports to Hong Kong have grown due to the increasing volume and value of lobsters. Over recent years, the proportion of South Australian lobsters being sent to Hong Kong has steadily increased, with approximately 93% of all South Australian lobster exports being sent to Hong Kong. Traded unit prices for South Australian lobster exports to Hong Kong have increased in recent years and are high compared with other markets.

Hong Kong is the world's largest importer of Abalone and the main market for SA Lobsters

Abalone is South Australia's other major export product to Hong Kong. Approximately 75% of all South Australian Abalone exports are sent to Hong Kong.

Hong Kong imports of seafood have grown steadily in recent years, with the largest increase coming from the increase in value of the Molluscs category (which includes Abalone).

Hong Kong import foods are not only consumed by the resident population, but Hong Kong is also an import point for the Pearl River Delta region of Southern China.

Further Reading

Western Australian Agri-Food and Fibre – Market Outlook
Hong Kong: Food Market Trends (2007)

Consumer Trends

Buying the Best of the Best

The SA Seafood plan seeks to position South Australia as a world seafood supplier, delivering to the 'white table cloths of the world'.

South Australia's biggest export markets include two of the world's premium seafood markets, Japan and Hong Kong. Accessing food service and hospitality distribution channels in these and other premium markets is an important challenge to grow the premium sector of South Australian seafood.

South Australia is only a small producer of seafood on the world scale. While there is scope for increasing production through Aquaculture, growing the value of the industry will require targeting markets where the characteristics of the products are valued and good returns are achieved. Maximising these returns will require the development of value chains to understand customer and consumer requirements and to have the supply chain partnerships and capability to deliver to those specifications.

High end restaurants and hotels offer a potential growth market for selling premium seafood products. The challenge is that other food producers are also seeking these high value markets and products need to be unique, superior or differentiated to justify a higher price. Premium tourism destinations such as Singapore and Hong Kong are current markets for Australian Seafood, while exports to emerging tourism destinations including United Arab Emirates and Saudi Arabia are currently much smaller. Markets where the resident population have high enough incomes to purchase premium seafood may also help to guide market development activities. Despite recent economic difficulties, the USA has a high per capita income and diverse markets for premium, unique and counter-seasonal products. The growth in consumer wealth in China, along with the value placed on premium food is also seeing strong growth in the food service market.

Further Reading

Middle East: An overview of the market for Victorian food products (2006)
US: Food Market Overview (2006)
Western Australia's Agrifood Market Outlook 2008
SA Government UAE Office
SA Seafood Plan

Key Products

Lobster

Major Markets

South Australian lobster production has remained stable at approximately 2,400 tonnes per annum for the last 5 years. Australian lobster industries are very export focused, with a large proportion of production sold in export markets. South Australian export volumes were approximately 77% of the total catch. South Australian lobsters are now predominantly exported live to Hong Kong. Volume, Value and Traded Price in the Hong Kong market have all grown in recent years, and over 93% of South Australian lobster exports are sent to Hong Kong.

Competitive Position

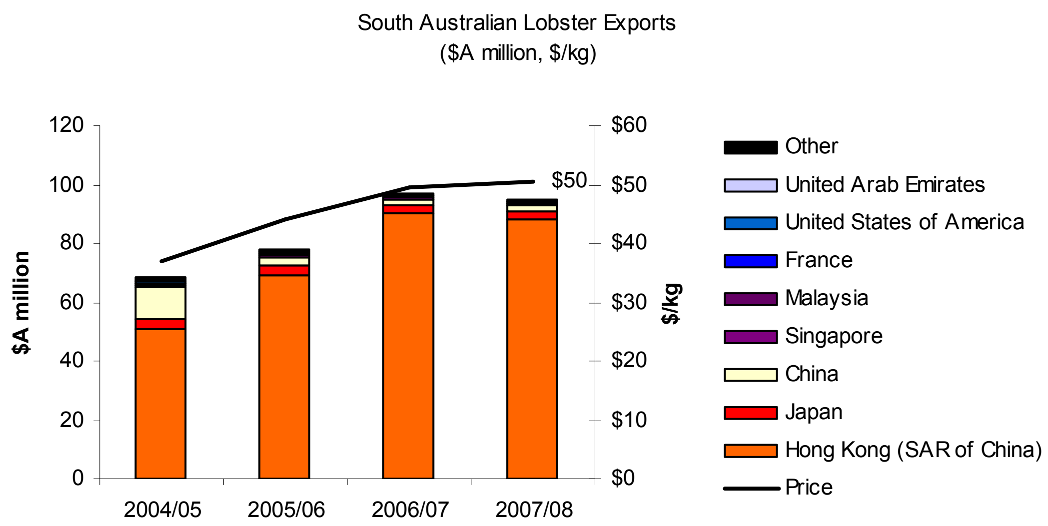
Note: In trade data, there are three major categories of lobsters – Rock Lobsters; Lobsters (*Homarus*) and Processed Lobsters. Lobsters are traded whole or processed (particularly as tails) and may be live, cooked and/or frozen. This can make direct comparison of trade prices difficult.

Australia is the largest supplier of Rock Lobsters to Hong Kong, supplying approximately 50% of the market. Around 95% of exports are listed as fresh (including live). South Australia is the largest supplier to Hong Kong amongst Australian states. Victoria, Tasmania and Queensland all supply the market and receive comparable prices. Western Australia is the second largest state sending to Hong Kong, but average prices of the Western Rock Lobster are lower than SA exports.

While increasing volumes of SA lobsters are being sent to the high value Hong Kong market, total Australian volume has fluctuated. This is largely due to the changes in volumes exported from Western Australia.

New Zealand is the second largest supplier of rock lobsters to Hong Kong, and prices received are similar to the average Australian price, with increases seen in recent years. New Zealand production includes the same species as South Australia (*Jasus edwardsii*). South Africa produces a related species, with volumes of lobsters exported to Hong Kong fluctuating and prices received slightly lower than Australian or New Zealand lobsters. USA is another high value supplier of rock lobsters, but volumes are small in comparison. Other suppliers of rock lobsters are generally tropical species, which are generally of a lower value than the cold water species. Unlike the cold water species, average import prices for the tropical species have not increased as dramatically over recent years.

South Australian producers are receiving good prices exporting to Hong Kong. However, the primary focus on the Hong Kong market could make SA producers susceptible to market downturns or disruptions. The USA is currently a large and high total value market for Australian lobsters, but only a small market for South Australia. Most of Australia's exports to the USA are frozen tails, particularly from Western Australia. Other

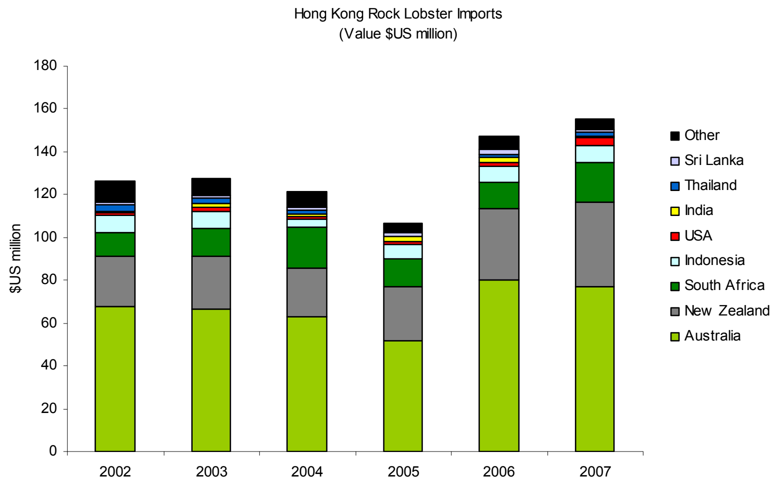


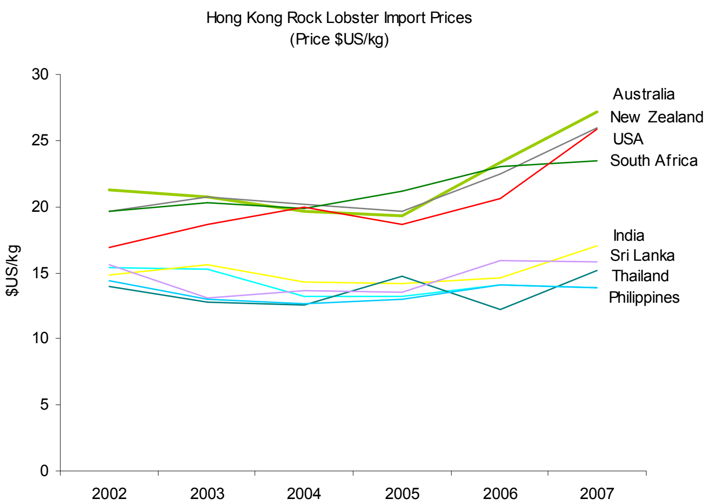
major suppliers of spiny lobsters to the USA include Brazil, Bahamas and Honduras, which are lower priced warm water species. Although currently only small volumes, high value fresh lobsters from SA, Queensland and Victoria receive good prices in the USA. Other high value markets for spiny lobsters include France and Belgium, but limited amounts of Australian lobsters are currently exported to Europe.

There is limited competition in the Australian market from imported lobsters, with only small amounts currently imported. Prices of both Australian and imported lobsters have risen in recent years. Countries exporting to Australia include Papua New Guinea and Cuba. The traded price of imported lobsters is generally lower than Australian lobsters.

Australian catch of lobsters has decreased in recent years, with a large decrease in Western Australian production. By volume, South Australia produces 17% of Australian production (2006/07). The decrease in total Australian production and increasing value of SA lobsters has increased SA's proportion of national production to 22%. All SA and Australian production is wild catch.

Almost all world production of lobsters remains wild catch, with only small amounts produced by aquaculture. World lobster production has increased slightly from 229,000 to 250,000 tonnes per annum over the last 8 years. Recent reduction in Australian production sees Australia account for 6.5% of world production.



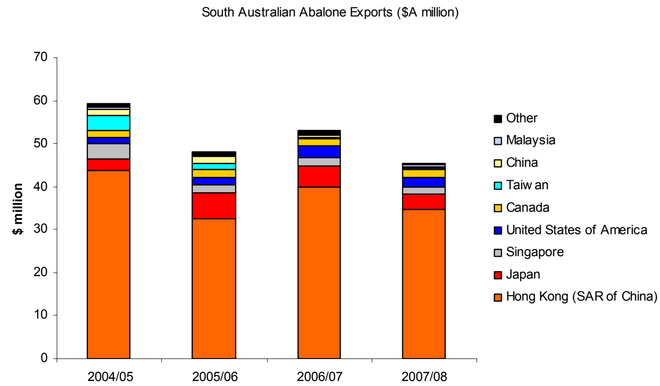


Abalone

Major Markets

Australian abalone production in 2006/07 decreased slightly in both wild catch and aquaculture production. Prior to 2006/07 Abalone aquaculture production had grown strongly, but wild catch abalone still accounts for over 90% of Australia's production.

Most Australian Abalone is exported. Only a very small amount is imported into Australia ($0.5 million). Hong Kong is the major export market for Australian and South Australian abalone. However, Abalone is exported to a range of markets including Japan, Singapore, USA, Canada, Taiwan and Malaysia. Hong Kong is by far the world's largest import market, with Hong Kong imports also moving through to China.

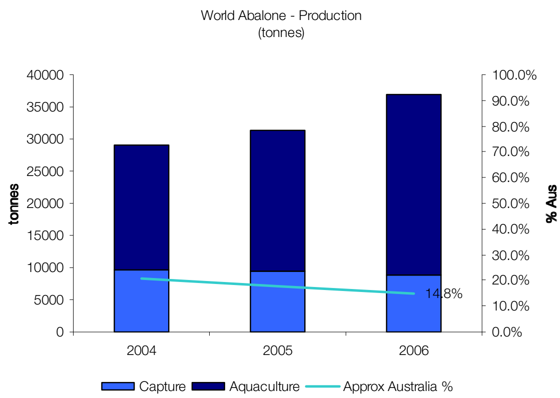


ABS Trade

Competitive Position

In addition to Hong Kong, other major import markets for Abalone include Japan, Taiwan, USA, China and Korea.

In contrast to the proportion of Australian wild catch/aquaculture production, world aquaculture production of abalone has quickly grown to account for 75% of all abalone production. Aquaculture production doubled in the 4 years to 2006 to 28,093 tonnes. China is the largest producer, but other large producers have seen significant growth in production including Korea, Chile and South Africa. The traded price of Abalone has decreased in recent years.



FAO Fishstat

With world abalone production quickly growing and Australian production remaining quite stable, Australia's proportion of world production has dropped from 20% to 15% in the last two years.

Australia is the largest wild catch Abalone producer, albeit with reduced production in each of the last two years. Australia produces approximately 56% of world wild catch abalone. Other major producers include Japan and New Zealand. Illegal capture of abalone is likely to make actual wild catch higher than the official reported figures of many countries.

China

2007 China Imports	Total ($US m)	5 year Growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA Exports ($A m)
Bluefin Tuna	0.2	N/A	0.0	0%		0%	
Lobster	21.7	379%	5.3	25%	1%	3%	2.5
Prawns	149.8	42%	2.4	2%		0%	
Molluscs/Abalone	33.5	76%	0.6	2%		1%	0.3
Fish	2740.8	153%	5.6	0%		0.2%	
Seafood	**3466.7**	**122%**	**22.6**	**1%**		**1%**	**3.4**

UN Comtrade, ABS Trade

China is currently quite a small market for direct exports of Seafood, although a number of Australian food products exported to Hong Kong are transhipped to China. While direct Australian seafood exports to China remain quite small, exports have grown in recent years – nearly doubling in value over the last five years. Over the same period, Chinese imports of seafood have grown quickly, the fastest amongst major world importers, more than doubling to be worth nearly $US 3.5 billion a year. China's aquaculture production of seafood is growing rapidly.

China's imports of seafood are the fastest growing in the world

USA

2007 USA Imports	Total ($US m)	5 year Growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA Exports ($A m)
Bluefin Tuna	22.1	56%	0.6	3%	0%	0.6%	1.1
Lobster	1063.0	13%	83.1	8%	0%	0.2%	1.4
Prawns	4092.0	16%	0.8	0%	0%	0%	0
Molluscs/Abalone	202.6	30%	3.9	2%	0%	5%	2.2
Fish	5646.9	54%	9.9	0%	0%	7%	0.7
Seafood	**14335.7**	**36%**	**100.2**	**1%**		**1%**	**4.1**

UN Comtrade, ABS Trade

The USA has grown to be the single largest importer of Seafood in the world. The largest growth in import volume has occurred in Fish and Prawns, while an increase in value has been seen across a range of sectors.

USA is an important market for Australian Seafood, but only a relatively small market for South Australian seafood exports. The major Australian seafood exports to USA include lobsters (particularly from Western Australia) and fish. The USA is Australia's second largest market for lobster exports taking 15% of all exports, but less than 1% of South Australian lobster exports. South Australia exports Abalone, Fish and Bluefin Tuna to the USA.

USA seafood imports have grown making it the single largest importing nation

South East Asia

2007 ASEAN Imports	Total ($US m)	5 year growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA Exports ($A m)
Bluefin Tuna	1.2	186%	0.0	0%		0.2%	.005
Lobster	21.8	42%	4.5	21%	2%	0.4%	0.4
Prawns	294.3	8%	1.4	0%		0.2%	.003
Molluscs	104.4	21%	21.2	20%	5%	26%	2.8
Fish	2164.3	93%	8.9	0%		18%	1.3
Seafood	3250.6	61%	50.6	2%		**1.5%**	**5.4**

UN Comtrade, ABS Trade

South East Asia is a relatively small, but diverse market for SA Seafood. Abalone, fish, lobsters, oysters and mussels are all exported to the region. Major importers of Seafood in the region include Thailand, Singapore, Malaysia, Philippines and Indonesia. The largest market for Australian products is Singapore, with Thailand, Malaysia and Vietnam also buying Australian seafood. Growth has been seen in the imports of a range of species including Abalone, Mussels and Fish. South East Asia is a major producer and supplier to Australia of fish, prawns and canned tuna.

Europe

2007 Europe Imports	Total ($US m)	5 year growth %	Australia ($US m)	Aus Market Share	SA Market Share	% of SA Exports	SA Exports ($A m)
Bluefin Tuna	32.8	-13%	0.0	0%		0%	0.2
Lobster	501.9	23%	9.4	2%		0.2%	0.3
Prawns	4179.8	24%	2.5	0%		95%	1.7
Molluscs	527.9	10%	0.5	0%		0%	0
Fish	16130.1	46%	6.8	0%		58%	5.2
Seafood	**39336.1**	**87%**	**26.0**	**0%**		**2%**	**7.5**

UN Comtrade, ABS Trade

Taken as a whole, the European Union is the largest importer of seafood, more than double the size of USA or Japan. Total seafood imports into the EU are growing strongly, with a small increase in total volume, but a substantial increase in value. Domestic production of seafood is under pressure through over-fishing and reduction in catch quotas.

Total EU import value growth has occurred across major sectors produced by South Australia – fish, lobsters, prawns and molluscs. Major country markets in the EU include Spain, France, Italy, Germany, UK, Belgium, Denmark, Sweden, Netherlands and Portugal.

South Australia only currently exports a small proportion of its Seafood to Europe. The largest value products include Prawns and Fish. SA Prawn exports to countries including Spain and Greece have shown a decrease in recent years. Exports of fish have increased, with important markets including France, Germany, Netherlands and UK.

Europe is the largest Seafood market in the world, but is currently only small market for SA exports

Consumer Trends

Conscientious Consumers

Food quality and price remain important considerations, but other traits of products are becoming increasingly important in customer (and consumer) purchase decisions. Attributes of production systems and environmental impacts are not readily assessable in the products themselves, but these 'credence' attributes are increasingly becoming an important point of differentiation for both products and retailers.

Organic food continues to show strong growth in major markets. While the actual reasons for eating organic food varies between customers, including environmental, nutrition, health and safety; growth for organic market products continues and usually at a price premium.

Additional environmental, social and economic factors are playing an increasingly important role in consumer choice and retailer marketing. While these factors are not as readily evident in the Australian retail market, in markets where there are larger numbers of retailers, the increased competition has driven retailers to seek to differentiate their product offerings, including increasingly branding products with credence attributes.

Coffee is an example of a competitive market within Australia where credence attributes are being promoted to differentiate retailers in this market, including "Rainforest Alliance" and "Fair Trade".

Consumers are looking at not only the product – but how it was produced, where it came from and what impact in has on the environment

Environmental considerations are already important consumer drivers in sophisticated EU markets, such as the UK, and are becoming increasingly important across the world. UK consumers are making purchase decisions on environmental and ethical grounds including climate change, sustainability, food miles, animal welfare and the negative effects on imports on the environment.

The strong growth in retailer home brands is in part, being driven by consumer's trust in the retailer to consider environmental and social considerations. Without specifically having to investigate the origin and production of particular products, retailers want consumers to be able to have a guilt free shopping experience.

A specific environmental consideration for seafood is the sustainability of fish stocks. The management of South Australian fisheries and environmental regulations around aquaculture production are positives for the industry. Environmentally sensitive aquaculture production may be an important product characteristic to enter and to differentiate SA products in European markets.

A factor that is likely to increase in importance for all Australian exporters is the environmental considerations of transporting products to distant markets. The concept of food miles has been conceptually embraced by environmentally conscious consumers as a description of environmental impact of global food production. While a distance measurement has many shortfalls in actually measuring carbon footprint of the production and transportation of food products, it is likely to be a consideration for Australian food producers, as it already is for wine exporters. The impact may be particularly acute for airfreighted products, which do produce a relatively high amount of CO_2 for every kg and km of travel.

Further Reading

Fish 'n' chips that last forever
Credence Attributes: Beyond price and quality - Understanding the credence attributes of food (2005)
Beyond Credence: Emerging Consumer Trends in International Markets (2007)
Australian Organic Market Report
Eating 'Green': Motivations behind organic food consumption in Australia
Sainsbury's "Our Values make us different", "Freedom Food"
Tesco "Greener Living"
Food Miles: A Simple Metaphor to Contrast Local and Global Food Systems

Key Products

Fish - Exports

In 2007/08, South Australian marine fish exports (excluding tuna, see page 12) saw an increase in volume and value. South Australia's fish export markets are spread throughout the world, with the largest markets now being in Europe. Excluding low value exports to China in previous years, the average export price of fish exports across all markets has remained steady.

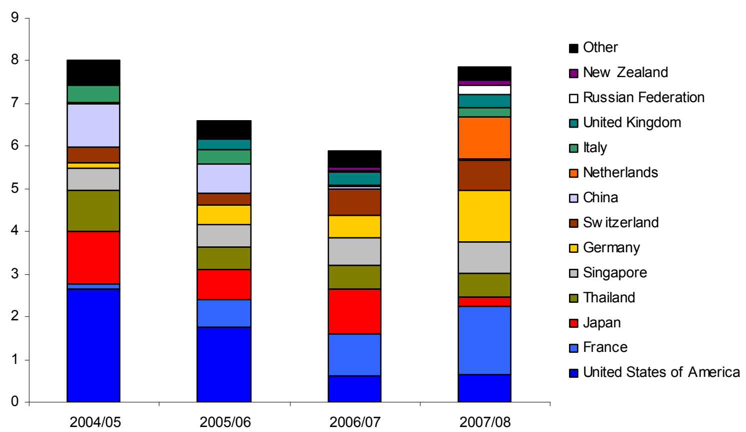
South Australia, and Australia overall, is only a small producer of fish by world standards. Europe is SA's largest market for SA fish (excluding tuna) and grew to over $A 7 million in 2007/08. This total is only a fraction of Europe's total fish imports, which were worth over $US 17 billion in 2007.

Specific world trade data is only available for selected species, for this reason it is difficult to identify specific markets trends for SA Fish aquaculture products from the trade figures. South Australian fish products are expensive by world standards. General Information on fish trade in different regions is presented as an overview.

Increasing SA fish aquaculture production is enabling the development of new international markets – particularly in Europe

Looking at fresh, frozen and fillets of fish, the volume of world trade has grown steadily in recent years, with increasing prices, growing the total value over 10% a year between 2003. Japan is the single largest fish importing country in the world ($US 5.825 billion, 2007), closely followed by USA ($US 5.418 billion, 2007). The EU as a whole is the largest market, with imports of fish rising from $US 12.7 billion to $17.3 billion between 2004 and 2006. Most major importing countries have seen an increase in imported value of fish, generally with increasing, or at least steady, total volumes. Against the trend of most markets, Japan has seen a decline in volume and value in 2007 and the three preceding years. Norway, China, USA and Chile are the largest fish exporters. Australia is both a small exporter (32nd largest) and Importer (24th largest) amongst all trading countries.

South Australian Fish (other) Exports ($A million)



ABS Trade

Tables

SA Seafood Exports

SA Seafood Export Markets ($A million)

Country of Destination	2004/05	2005/06	2006/07	2007/08
Japan	159.9	183.8	148.3	191.6
Hong Kong (SAR of China)	95.3	102.0	131.0	123.6
United States of America	6.2	6.3	4.6	4.1
Singapore	5.1	3.0	3.1	3.7
China	13.5	5.4	2.8	3.4
Canada	1.7	1.9	1.5	1.9
Netherlands	0.1	0.0	0.0	1.1
Germany	0.1	0.5	0.5	1.2
Greece	5.4	4.4	2.9	1.5
France	0.2	0.9	1.4	1.9
Malaysia	0.9	0.5	0.7	0.9
Switzerland	0.4	0.3	0.6	0.8
Thailand	1.1	0.7	0.6	0.6
United Kingdom	0.3	0.6	0.7	0.6
Spain	5.9	4.7	1.1	0.1
Taiwan	3.4	1.3	0.4	0.3
Italy	0.8	1.5	0.5	0.3
United Arab Emirates	0.2	0.1	0.2	0.2
Russian Federation	0.0	0.0	0.0	0.2
Other	1.4	0.9	1.0	0.6
SA Total	**302.0**	**318.7**	**301.9**	**338.7**

SA Seafood Export Products ($A million)

Product Group	2004/05	2005/06	2006/07	2007/08
Southern Bluefin Tuna	137.4	161.7	138.9	186.7
Lobster	68.3	77.7	96.7	94.7
Abalone	59.3	48.1	53.1	45.4
Prawns	27.8	23.8	5.0	1.8
Other Fish	8.0	6.6	5.9	7.9
Oysters	0.6	0.5	1.1	1.2
Other Shellfish/Molluscs	0.6	0.3	1.3	0.9
SA Total	**302.0**	**318.7**	**301.9**	**338.7**

Trade Data is provided by ABS with categories sorted by PIRSA. Data should be taken as indicative only. There are confidentiality restrictions within the ABS trade data. Data for selected export products and destination markets is classified as confidential, so all product exports may not be included in totals.

PIRSA Food Scorecard

(to be updated 2007/08 when released)

SA Seafood ($A million)

Seafood	2003-04	2004-05	2005-06	2006-07
Food Farm Gate Value	431	305	391	387
Total Farm Gate Value	451	325	408	406
OS Commodity Exports	0	0	0	0
OS Commodity Imports	0	0	0	0
Net Interstate Commodity Exports	0	0	0	0
Net Interstate Commodity Imports	74	53	53	36
Finished Food Value	610	429	534	483
OS Finished Food Exports	398	302	319	302
OS Finished Food Imports	69	74	79	89
Net Interstate Finished Food Exports	182	175	211	201
Net Interstate Finished Food Imports	31	17	44	18
Retail Sales	130	131	170	172
Food Service	56	57	69	58
Net Food Revenue	592	521	593	590
Gross Food Revenue	766	664	769	733

https://info.pir.sa.gov.au/scorecard/page/Strategic.html

SA Fisheries Production

ABARE Fisheries	2004/05		2005/06		2006/07	
	t	$m	t	$m	t	$m
Crustaceans						
Prawns	2,173	36	2,070	37	2,233	43
Rock lobster	2,343	66	2,365	81	2,385	97
Crab	780	4	791	4	720	6
Other	20	0	19	0	18	0
Sub Total	*5,316*	*106*	*5,245*	*122*	*5,356*	*145*
Molluscs						
Abalone	902	34	896	34	883	32
Pipi	1,103	1	1,025	2	994	2
Squid	504	3	311	2	297	3
Other	493	2	504	2	478	2
Sub Total	*3,002*	*40*	*2,736*	*39*	*2,652*	*38*
Fish a						
Australian salmon	137	0	180	0	161	0
Mullet	160	0	164	0	177	1
Australian herring	183	0	126	0	105	0
Snapper	504	3	529	3	644	4
King George whiting	347	4	336	4	361	5
Garfish	364	2	369	2	293	2
Leatherjackets	349	1	168	0	68	0
Australian sardine	46,388	23	28,626	16	30,355	19
Yellowfin whiting	138	1	130	1	85	1
Snook	83	0	61	0	64	0
Golden perch	102	1	123	1	152	1
Other species	1,112	1	1,247	2	1,236	2
Sub Total	*49,867*	*37*	*32,059*	*31*	*33,701*	*35*
Total wild caught	*58,185*	*183*	*40,040*	*193*	*41,709*	*219*
Aquaculture b						
Yabbies	20	0	2	0	5	0
Marron	22	1	10	0	24	1
Oysters	4,650	20	5,397	24	7,720	38
Southern Bluefin tuna c	7,458	140	8,806	156	7,486	138
Barramundi	217	2	400	3	385	4
Trout	66	1	53	0	38	0
Abalone	177	5	250	8	196	7
Mussels	377	1	469	1	1,032	2
Other d	2,019	17	2,148	18	1,953	19
Sub Total	*15,006*	*187*	*17,535*	*210*	*18,839*	*208*
Total production	73,191	370	57,575	403	60,548	426

a Excludes shark from the southern shark fishery. b Excludes hatchery production. Data from 2004-05 from Primary Industries and Resources South Australia. c Processed weight. Input of wild caught southern bluefin tuna from Commonwealth southern bluefin tuna fishery was 5215 tonnes in 2004-05, 5189 tonnes in 2005-06 and 5342 tonnes in 2006-07. d Includes snapper, microalgae, Murray cod, yellowtail kingfish, golden perch and aquarium fish. p Preliminary. s Estimates.
Sources:ABARE; South Australian Research and Development Institute; Primary Industries and Resources, South Australia.

References

Australian Organic Market Report
http://www.bfa.com.au/index.asp?Sec_ID=259

Beyond Credence: Emerging Consumer Trends in International Markets (2007)
http://www.dpi.vic.gov.au/

Credence Attributes: Beyond price and quality - Understanding the credence attributes of food (2005)
http://www.dpi.vic.gov.au/

Buy SA It's better for you
http://buysa.mtkatalyst.com/index.html

Current issues in the understanding of consumer food choice
Trends in Food Science & Technology 13 (2002) 275–285

Consumers' food choice and quality perception
http://ideas.repec.org/p/hhb/aarmap/0077.html

Eating 'Green': Motivations behind organic food consumption in Australia
Sociologia Ruralis, Volume 42, Number 1, January 2002 , pp. 23-40(18)

Export Potential for Organics
http://www.rirdc.gov.au/reports/ORG/06-061.pdf

Factors influencing the consumption of seafood among young children in Perth: a qualitative study
BMC Public Health. 2007; 7: 119

Fish 'n' chips that last forever
http://www.smh.com.au/news/environment/fish-n-chips-that-last-forever/2008/08/26/1219516472379.html

Food Miles: A Simple Metaphor to Contrast Local and Global Food Systems
http://www.leopold.iastate.edu/pubs/staff/files/local_foods_HEN0604.pdf

Hong Kong: Food Market Trends (2007)
http://www.dpi.vic.gov.au/

Japan: Food Integrity in Japan - Opportunities for Victorian food products (2005)
http://www.dpi.vic.gov.au/

Middle East: An overview of the market for Victorian food products (2006)
http://www.dpi.vic.gov.au/

Relationship between attitudes towards healthy eating and dietary behaviour, lifestyle and demographic factors in a representative sample of Irish adults
Appetite, Volume 48, Issue 1, January 2007, Pages 1-11

SA Government UAE Office
http://www.southaustralia.biz/Exporting-from-SA/Overseas-contacts/UAE.aspx

SA Seafood Plan
http://www.pir.sa.gov.au/fisheries/commercial_fishing/sa_seafood_plan

Sainsbury's "Our Values make us different", "Freedom Food"

Seafood Consumption in Australia & Drivers of Prawns Purchase
Remaud H. and Mueller S., (2008). Drivers of Australian Consumers when Purchasing Prawns. Australasian Aquaculture International Conference, August 3-6, Brisbane.

South Australia Wine and Food
http://www.southaustralia.com/WineAndFood.aspx

Stimulating Domestic Tourism
http://www.tourism.australia.com/content/Australia/2008/Stimulating%20Domestic%20Tourism%20LR.pdf

Sushi: no longer just a fashion statement
http://www.mnweekly.ru/local/20080926/55348656.html

Sushi, Russia's new caviar
http://www.thefirstpost.co.uk/2001,features,sushi-russias-new-caviar

Tesco "Greener Living"

The "Maguroeconomics" of tuna, the grand champion of fish cuisine
http://mdn.mainichi.jp/features/news/20080929p2a00m0na013000c.html

The Seafood "Dilemma"—A Way Forward
http://www.nmfs.noaa.gov/fishwatch/docs/seafood_dilemma.pdf

US: Food Market Overview (2006)
http://www.dpi.vic.gov.au/

Western Australia's Agrifood Market Outlook 2008
http://www.agric.wa.gov.au/pls/portal30/docs/FOLDER/IKMP/AMT/MARKETOUTLOOK2008.PDF

Western Australian Agri-Food and Fibre – Market Outlook
http://www.agric.wa.gov.au/amic/docdownload/1481/marketoutlook08upload.PDF

What's so healthy about seafood?
http://bookshop.frdc.com.au/fish/healthy/