

## SEAFOOD MARKET IN BRIEF

The Australian seafood market has undergone significant changes. There has been a major shift from processed seafoods towards fresh and frozen seafoods. Demand for seafood has been increasing, mostly due to rising consumption at restaurants. Over 33% of total seafood eaten is consumed in restaurants. The restaurant sector is highly vulnerable to a slowdown in economic activity and has been adversely affected in the past few years by a weak economy. Economic improvements during 1994 should cause domestic demand and private consumption to rise.

According to the Australian Bureau of Agricultural and Resource Economics, the total value of imports of seafood products in the 1992/93 (July--June) season increased by 4% to AUD469 million. The significant imports were fresh, chilled or frozen prawns at AUD119M, canned fish (incl. salmon), also at AUD119M. Total smoked fish AUD17M. Canadian market share in 1992/93: total (AUD35.5M); canned fish (AUD32M); smoked fish (AUD1.3M); fresh, frozen fish meat and fillets, excluding salmon (AUD0.8M); and, crustaceans and molluscs (AUD0.2M).

Canada's principal competitor in the Australian canned salmon market was Thailand, with exports reaching over AUD33M in 1992/93, but these Thai shipments have fallen off to less than AUD1M for 1994. Canada's principal competitor in the Australian smoked fish market is New Zealand, with imports topping AUD2M in 1992/93.

All imported foods are liable to inspection by the Australian Quarantine and Inspection Service (AQIS) under the new Imported Foods Inspection Program (1993). Canada's Department of Fisheries and Oceans provides, upon inspection, certificates stating that fish and fish products meet AQIS's standards for import. In June 1993, Canada signed a mutual recognition Memorandum of Understanding for fish and fishery products intended for human consumption traded between Australia and Canada.

The main purpose of the initiative was: 1} To provide reasonable assurance that fish and fishery products prepared under the supervision of each agency will not be tainted, decomposed or unwholesome and will otherwise meet the requirements of the importing country; and, 2} To recognize export certificates issued by the participating agencies, thus minimizing the requirements for further inspections and analyses of certified shipments at the time of importation. Fresh, chilled, frozen salmonids (trout and salmon) are banned on quarantine grounds, allegedly due to fish disease concerns. Smoked salmon must be heat treated-cold smoked salmon is prohibited. Products must also comply with Australia's National Food Standards Code. Most fish products come in duty free.

The Australian National Seafood Consumption Study conducted by the Fisheries Research and Development Corporation and published in August 1992, revealed per capita fish and seafood consumption, of Australians living in households, of 12.06 kilograms per annum. Consumption has increased by 20 percent since the previous national study, and of the 12.06 kilograms, 9.31 kilograms was fish and 2.74 kilograms was seafood. In-home per capita consumption of fish was 6.94 kilograms and of seafood 1.11 kilograms. Equivalent per capita figures for out-of-home consumption were 2.3 kilograms and 1.64 kilograms respectively.