

Mission: 533 Sydney

Market: 011 Australia

Key Subsector: 022 Processed Fish and Shellfish

Specific Product Opportunities: Current Imports (\$CDN)

Hake fillets	\$31.20 M
Smoked hake	\$7.10 M
Canned sardines	\$12.00 M
Prawn meat	\$36.40 M
Squid tubes	\$6.30 M

General Outlook:

By value Australia remains a gross exporter of fish and fish products while by volume approximately 54 per cent of fish and fish foods consumed are imported. Based on the fiscal year of July 1 to June 30, the estimated value of production was \$850 million in 1987-1988, up from \$735 million in 1986-1987. In 1986-1987 value of production by major category was prawns \$220 million, rock lobster \$186 million, finfish \$180 million and shellfish \$140 million.

Exports in 1987-1988 were valued at \$724 million (\$593 million in 1986-1987) while imports came to \$414 million, down from \$426 million in 1986-1987. In 1987-1988 prawn exports were valued at \$62 million, and rock lobster at \$268 million. Major import categories in the same period were \$54 million of hake fillets, \$43 million of other fillets, \$48 million of canned salmon, \$37 million of other canned fish, and \$93 million of frozen and other prawns.

Major suppliers to the Australian market during 1987-1988 were in order, New Zealand \$56 million, Thailand \$52 million, Malaysia \$32 million, Canada \$28 million and Argentina \$21 million. Relevant positions in the previous fiscal year were New Zealand \$49 million, Canada \$47 million, Thailand \$45 million, South Africa \$34 million, and Malaysia \$32 million. Argentina benefitted from the ban on trade with South Africa by soaring from \$4 million in 1986-1987 to \$21 million in 1987-1988. Conversely, owing to the vagaries of the canned salmon market, Canada's position fell from second to fourth (canned salmon \$33.5 million in 1986-1987 and \$18.2 million in 1987-1988).

Canada's trade with Australia in fish and fish products has been traditionally dominated by canned salmon, and efforts to diversify the range of product have met with little success. The only other products of significance, as evidenced by 1987-1988 statistics, are smoked salmon (\$4.5 million), other filleted fish (\$2.5 million) and canned sardines (\$2.3 million).