

ASIA/PACIFIC

AUSTRALIA

Western rock lobster is the most valuable single-species fishery in Australia. Virtually all the production is exported: to the United States as frozen, raw tails; and to Japan and Taiwan as live lobster, frozen whole-cooks or frozen raw product. While the United States dominated the Australian lobster export market for years, exchange rates coupled with increasing Asian demand (more recently for live lobster) have diminished its importance to Australian exporters. It would not be fair to say the Australians invented the cold water tail, but they perfected the product. In the early days, it was one-product-for-one-market (frozen tails for the United States), but over the years, Australia has diversified to other products—live lobster to Asia for example—while U.S. importers have remained tied to tails. The harvest in 1993-94 was 12,000 tons; it is expected to drop to 9,500 tons in 1994-95, with the peak harvest period from November to March.

Western rock lobster is Australia's volume lobster, but not its only species. Other species harvested are southern rock lobster {*Jasus edwardsii*}, eastern rock lobster {*J. verreauxi*}, and ornate rock lobster {*Panulirus ornatus*}. Lobsters are landed year-round in Australia, depending on the species. Prices for frozen B-sized tails (6-8oz) ranged from AUS\$19.50 to AUS\$20 per pound in 1993, a decline from the previous year. Western rock lobsters {*Panulirus longipes cygnus*} are limited to the waters off Western Australia and inhabits waters of 15°C–27°C in temperature. Sizes average approximately one pound, with a maximum back shell of six inches, and weight 5½ pounds. Size regulations due to resource preservation prohibits the catch of those smaller than back shell of three inches. Southern rock lobster {*Jasus edwardsii*} are available in wide areas from Victoria, and Tasmania to Southern Australia, with water temperatures between 10°C–25°C. Maximum size would be back shell of six inches, and weight nine pounds; but those from Victoria and Tasmania have back shell of 4½ inches (male), under four inches (female). It is illegal to catch female or male with back shell under 3½ inches in Southern Australia.

Australian Rock Lobster Production

<i>Production</i>	<i>1988-89</i>	<i>1989-90</i>	<i>1990-91</i>	<i>1991-92</i>	<i>1992-93</i>
Quantity {tons}	17,700	15,700	14,400	17,500	17,934
Value {AUS\$,000}	280,000	244,700	276,600	340,300	327,532

Source: Australian Bureau of Agricultural and Resource Economics (ABARE).

Australian seafood consumption has undergone significant changes. Demand for seafood has been increasing, due to rising consumption at restaurants. Over 33 percent of total seafood eaten, is consumed in the restaurant sector of the economy. There has been a major shift from processed seafoods towards fresh and frozen seafoods. Apparent 1991 domestic consumption of lobster {all product forms} was estimated at 5,533 tonnes, of which 218 tonnes was imported. Australia is a major producer of rock lobster and exports over 70 percent of production to Southeast Asia and the United States. Imports of frozen lobster into Australia are principally from Thailand, Papua New Guinea, Mexico, Cuba and Canada. Imports of rock lobster are mainly from Thailand, Papua New Guinea, and the United States. Market preference in Australia is for small fresh or chilled whole lobster; and fresh, chilled or frozen tails.

Australian Lobster Exports

{Tonnes/June-June}

<i>Product Form</i>	<i>1991</i>	<i>1992</i>	<i>1993</i>
Rock lobster, whole, fresh, chilled or frozen	6,380	9,022	10,261
Rock lobster, whole, cooked	427	758	1,228
Rock lobster, tails, fresh, chilled or frozen	1,605	2,083	1,789
Rock lobster, other products	332	383	321
Total Australian Lobster Exports	8,745	12,246	13,599

Source: Australian Bureau of Statistics, ABARE.