

# **Under-utilised Seafood to Asia**

## **A guide for Australian seafood exporters**

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**Project No. 1999/347**

## TITLE PAGE

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## 1. NON-TECHNICAL SUMMARY

The Hooking into Asian Seafood Markets project was established to identify and facilitate the development of markets for Australian under-utilised seafood species, and to help industry operators to better understand the key opportunities and challenges that exporters need to consider in relation to exporting under-utilised seafood species to overseas markets.

The under-utilised seafood export guide is designed to help Australian seafood operators better understand the requirements of the Asian marketplace and could be used as a handbook for undertaking export development in Asian countries. It is aimed at those fishers and processors who want to export for the first time or who are relatively inexperienced in exporting. There is however also valuable information for exporters seeking to export new products or targeting new markets.

The Export Guide contains seven major sections.

- ? An Export advice section that summarises the key findings and lessons learnt from the project and also incorporates some information and tips from Australian seafood exporters on their exporting experiences.
- ? A guide to exporting section, which identifies steps and processes involved in exporting and is for fishers and processors who want to export for the first time or who are relatively inexperienced in exporting. There is also valuable information for exporters who are seeking to export new products or who are targeting new markets.
- ? Five case studies. These recount the experience gained and lessons learnt in seeking to establish new export markets for the under-utilised species concerned. They focus on Australian salmon, sea mullet, spotted mackerel, ocean jackets, and ribbonfish.
- ? A market interest section which identifies the potential market opportunities in Asia for each of the eight under-utilised species discussed in the guide. The project team undertook in-market research in China, Hong Kong, Japan, Singapore, South Korea, Taiwan and Thailand.
- ? Seven country analyses. These present an overview of the selected Asian countries and have been developed in order to give the reader an insight into each country's seafood market. They provide valuable information about seafood consumption trends and preferences; market segment opportunities; competition; market entry restrictions; distribution networks; and other areas of interest to potential exporters.
- ? Eight species profiles that provide background information on each of the species discussed, including flesh characteristics, how and where caught, capability of supply and useful additional comments. These eight species include Australian salmon, hussar, morwong, ocean jacket, ribbonfish, sea mullet, silver warehou and spotted mackerel.
- ? Tips for doing business in Asia. Australian seafood exporters conducting business in Asia need to understand the Asian culture and ensure that they do not apply their own

Australian value system when communicating and negotiating with people from Asia. This section provides valuable information about Asian culture and business practices.

- ? A list of key contacts is also included to help potential exporters identify points of contact both in the overseas market and domestically.

The export guide was aimed at adding value to Australian under-utilised species by investigating the demand for them in selected Asian seafood markets and identifying characteristics of these markets. In the long term, the adoption of the opportunities identified throughout the project has real potential to develop new export markets. The challenge for exporters is to match their capability to supply under-utilised Australian seafood products with the specific requirements of the various Asian seafood markets.

## **2. ACKNOWLEDGEMENTS**

A publication of this nature requires input from numerous people. We acknowledge the following people for their significant and generous contributions.

Tony Bewley	Ocean Fresh Fisheries
Peter Jones	Pacific Islands & Australian Marketing
Terry Moran	South East Trawl Fishing Industry Association Ltd
Peter Shelley	Tasmanian Quality Foods
Richard Stevens	Western Australian Fisheries Industry Council

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### 3. BACKGROUND

The Hooking into Asian Seafood Markets (HIASM) project was developed in response to an identified need for improved market development by the Australian seafood industry and a need for improved resource utilisation through the commercial development of selected under-utilised Australian fisheries resources.

A National Steering Committee was established to provide a national focus for the project and also to provide a source of high quality industry experience to advise the project team. It was the first time in Australia that a high profile industry team has met regularly to focus on marketing and commercialisation of Australian under-utilised species.

The achievements of the Hooking into Asian Seafood Markets project (Phase one) have included:

- Arranged sales of chilled red snapper to Hong Kong.
- Arranged sales of horseshoe leatherjackets to Hong Kong
- Encouraged project participants to investigate the potential of smoked Australian salmon and sea mullet and the development of a smokehouses
- Developing a new market for frozen mullet in Singapore. This market is in place for the 1999 mullet season.
- Leading a group of exporters and potential exporters to then China Fisheries and Seafood Expo in Dalian. This trip was organised in conjunction with Supermarket to Asia and enabled seafood operators to display their products under the Quality food Australia banner – the first time this quality logo has been displayed in an Asian market
- Organising samples of red snapper to China and Japan, smoked mullet fillets to Shanghai and Beijing, Australian Salmon to China, mullet to Singapore, queen fish to Japan, chilled leatherjackets to Hong Kong and proposed live leatherjacket to China
- Arranging quotes to a number of Asian countries for a range of species
- Developed industry interest with Katsubushi for the Japanese market
- Supported and co-operated with the Northern Territory government on a red snapper project
- Supplied market contacts to a range of seafood exporters throughout Australia to encourage them to export under- utilised species
- Supported research project on smoked Karasumi and Karasumi sauce
- Development of a number of initiatives for under utilised species – markets for aquaculture eels in Japan have been researched and samples sent for evaluation

Several reports were generated as part of phase one of the project including:

- An Analysis of Asian Markets for Seafood Products,
- The Potential for Australian Under-Utilised Seafood Species in Hong Kong,
- The Potential for Australian Under-Utilised Seafood Species in Japan,
- The Potential for Australian Under-Utilised Seafood Species in Singapore,
- The Potential for Australian Under-Utilised Seafood Species in China,
- Country Briefs for China, Japan, Taiwan, Hong Kong and Singapore.

Phase two of the HIASM project has been built on the efforts of Phase one. Following a shift in focus of the project and also due to external factors, the original objectives had to be revised. The amendments were approved by FRDC.

The HIASM project application and signed contract was based on financial contributions from Supermarket to Asia (STA). The STA funding was designed to support Australian exporters to promote Australian products at Asian Trade Shows and to gather up-to-date market intelligence for sales development and as a direct input to the Export Guide. STA were unable to support the program requiring a substantial rework of the project's objectives and milestones. As a result the original project objectives of phase two were renegotiated in 2000.

The original objectives of the HIASM project included:

1. Maintain and increase an effective market presence in Asia through: research into maximising returns on existing products, new market research, competitor analysis and new species research.
2. Achieve the entry of one under utilised species into an Asian market from the original HIASM project and at least on species product from the new project.
3. Achieve greater industry export market awareness and capability through: supporting industry attendance at trade exhibitions an utilisation of market networks through Queensland Government officers, Austrade and private sector alliances.
4. Provide Asian market requirements data for the development of SeaQual (Australia) quality certification for the seafood industry.
5. Facilitate the integration of SeaQual (Australia) initiatives throughout the seafood export supply chain.
6. Develop 'an export framework' for ongoing use by seafood marketers.

The amended objectives also take into account a shift in emphasis from pure sales targets to the provision of outputs that are directed more at the capture of information and learning from the activities directed to sales development for future use of the fishing industry.



As a result the objectives were revised and are as follows:

1. Publish by 30 November 2001 an export guide for under-utilised seafood products to Asian markets
2. Achieve sales of one or more under-valued seafood products into Asian markets by 30 November 2001
3. Print fifteen (15) product briefs covering product specification, supply locations, volumes and seasonal availability by 31 December 2000

Ultimately in 2000 (Project Phase two), eight species were selected as having the best return if they were marketed successfully in Asia.

They are as follows:

- Australian salmon
- Hussar
- Morwong
- Ocean jacket
- Ribbonfish
- Sea mullet
- Silver warehou
- Spotted mackerel

All Asian markets were screened to determine their market attractiveness for under-utilised species. The following seven Asian countries were examined in terms of ascertaining market potential for Australian under-utilised species:

- China
- Hong Kong
- Japan
- Singapore
- South Korea
- Taiwan
- Thailand

As a result, in 2001 “Under-utilised Seafood to Asia – A Guide for Australian Seafood Exporters” was published and launched at the Seafood Directions Conference in November 2001. This Guide was a compilation of information gathered and experiences gained during both phases of the Hooking into Asian Seafood Markets project. This publication provided

expert advice and valuable information on how to export under-utilised seafood to Asia, focusing on the eight selected Australian under-utilised seafood species into the seven identified Asian countries.

#### **4. NEED**

Phase two of the Hooking into Asian Seafood Markets project addressed the FRDC program 'industry development' and its key areas of market development, value adding and quality and information delivery.

The number of enquiries received by the project team on a wide range of species and products highlights the need for this project. The main needs that this project addressed are:

- Keeping the Asian seafood market door open at a time when industry attention is temporarily diverted to such markets as USA and Europe.
- Overcoming the lack of industry expertise in marketing and lack of awareness of quality requirements of quality requirements in Asian markets
- Adding value to under-utilised species
- Generating interest in export markets
- Revising awareness of Asian market and their product and quality requirements
- Developing a framework for how to do business in Asia included key marketing data on the Asian markets competitor profiles and impediments to trade in the region

The research undertaken by the project team whilst compiling 'Under-Utilised Seafood to Asia – A Guide for Australian Seafood Exporters', addressed the main needs for the project.

## 5. OBJECTIVES

The original objectives of the HIASM project included:

1. Maintain and increase an effective market presence in Asia through: research into maximising returns on existing products, new market research, competitor analysis and new species research.
2. Achieve the entry of one under utilised species into an Asian market from the original HIASM project and at least on species product from the new project.
3. Achieve greater industry export market awareness and capability through: supporting industry attendance at trade exhibitions an utilisation of market networks through Queensland Government officers, Austrade and private sector alliances.
4. Provide Asian market requirements data for the development of SeaQual (Australia) quality certification for the seafood industry.
5. Facilitate the integration of SeaQual (Australia) initiatives throughout the seafood export supply chain.
6. Develop 'an export framework' for ongoing use by seafood marketers.

As mentioned earlier, the project application was based on financial contributions from Supermarket to Asia (STA) of which a significant component was not available, and as a result the project objectives were renegotiated.

The amended objectives also take into account a shift in emphasis from pure sales targets to the provision of outputs that are directed more at the capture of information and learning from the activities directed to sales development for future use of the fishing industry.

As a result the objectives were revised and are as follows:

1. Publish by 30 November 2001 an export guide for under-utilised seafood products to Asian markets
2. Achieve sales of one or more under-valued seafood products into Asian markets by 30 November 2001
3. Print fifteen (15) product briefs covering product specification, supply locations, volumes and seasonal availability by 31 December 2000

Correspondence from Devinka Wanigesekera, General Manager, Rural Market Development requesting the amendment of the project objectives is included in Appendix 1.

## **6. METHODS**

### **OBJECTIVE 1: Publish by 30 November 2001 an export guide for under-utilised seafood products to Asian markets**

1. Information was adapted from the existing Hooking into Asian Seafood Markets Reports.
2. A survey was distributed to relevant members of the Australian seafood industry to prioritise the under-utilised seafood species for inclusion in this project.
3. In-market visits were conducted to Singapore, Thailand, Hong Kong and China. Within each market interviews were conducted with seafood importers, distributors, processors, restaurateurs, seafood procurement officers and relevant members of the seafood distribution chain to gain detailed information on the market acceptance of a selected range of Australian under-utilised seafood. Information was also gained to profile each Asian seafood market.
4. Austrade officers in Taiwan and Korea were contracted to conduct research interviews with seafood importers, distributors, processors, restaurateurs, seafood procurement officers and relevant members of the seafood distribution chain in their respective countries.
5. Peter Shelley was a co-investigator of the Hooking into Asian Seafood Markets project and specifically provided in-market information on the Japanese seafood market in relation to Australian under-utilised seafood species.
6. A visit to the members of the South East Trawl and the Western Australian fishing communities was conducted to ascertain availability of product and gain industry feedback on the project outcomes.
7. Secondary research was conducted by project staff to build on the in-market information attained.
8. The export guide for under-utilised seafood species was published and launched at the Seafood Directions Conference on 29<sup>th</sup> November 2002.

### **OBJECTIVE 2: Achieve sales of one or more under-valued seafood products into Asian markets by 30 November 2001**

1. Research was conducted to identify opportunities for the under-utilised species in the selected Asian markets of China, Hong Kong, Japan, Singapore, South Korea, Taiwan and Thailand.
2. The sales development program received a significant boost in November 2000 with visits to China, Hong Kong and Thailand. Meetings with potential customers including distributors, importers, supermarket procurement officers, wet market sales staff and restaurateurs were aimed at further market development for the species, as

well as to find in-market information for the development of the export guide. Samples of different species were sent to various companies as a follow up to these visits.

3. The project team visited companies in the South East Trawl, Western Australian and Northern Queensland regions to ascertain their supply capabilities and their willingness to be involved in the project.
4. Samples were sent from the abovementioned companies to potential customers identified by the project team. Some of the samples sent were positively received and were followed by requests for trial shipments.
5. A successful sale was negotiated as a result of these activities for Spotted Mackerel to Osaka.

**OBJECTIVE 3: Print fifteen (15) product briefs covering product specification, supply locations, volumes and seasonal availability by 31 December 2000**

1. A survey was distributed to relevant members of the Australian seafood industry to prioritise the under-utilised seafood species for inclusion in this project. Twenty- four species were selected for inclusion in the project.
2. Secondary research was conducted on these 24 species and covered areas such as physical features, common size, flesh characteristics, how and where caught, availability, as well as other relevant information.
3. Project staff complied and printed 24 coloured product briefs in October 2000 to be used to create awareness of and promote, a range of Australian under-utilised seafood species.

## **7. RESULTS/DISCUSSION**

The results discussed in the section specifically relate to the outputs achieved during Phase two of the project.

### **EXPORT GUIDE**

#### **Research Undertaken**

Twenty-six Australian under-utilised species were initially selected to determine their export potential in selected Asian markets. These markets were China, Hong Kong, Japan, Singapore, South Korea, Taiwan and Thailand. The final prioritisation of eight species for the export guide was based on those that had the most market potential and also those that most widely represented the types of species families that were known and demanded in Asia. The under-utilised species profiled were Australian Salmon, Hussar, Morwong, Ocean Jacket, Ribbonfish, Sea Mullet, Silver Warehou, and Spotted Mackerel.

Prior market research from phase one of the HIASM project assisted with the selection of both the markets and species for further research. In-market research was conducted in each of the countries, which included interviews with relevant members of the Asian seafood industry supply chain.

To build on the in-market information gathered, the project staff also conducted secondary research.

#### **Printing/Publishing the guide**

The export guide was published with 8 major sections

- ? An Export advice section that summarises the key findings and lessons learnt from the project and also incorporates some information and tips from Australian seafood exporters on their exporting experiences.
- ? A guide to exporting section, which identifies steps and processes, involved in exporting and is for fishers and processors who want to export for the first time or who are relatively inexperienced in exporting. There is also valuable information for exporters who are seeking to export new products or who are targeting new markets.
- ? Five case studies. These recount the experience gained and lessons learnt in seeking to establish new export markets for the under-utilised species concerned. They focus on Australian salmon, sea mullet, spotted mackerel, ocean jackets, and ribbonfish.
- ? A market interest section, which identifies the potential market opportunities in Asia for each of the eight under-utilised species discussed in the guide. The project team undertook in-market research in China, Hong Kong, Japan, Singapore, Singapore, Taiwan and Thailand.
- ? Seven country analyses. These present an overview of the selected Asian countries and have been developed in order to give the reader an insight into each country's seafood

market. They provide valuable information about seafood consumption trends and preferences; market segment opportunities; competition; market entry restrictions; distribution networks; and other areas of interest to potential exporters.

- ? Eight species profiles that provide background information on each of the species discussed, including flesh characteristics, how and where caught, capability of supply and useful additional comments.
- ? Tips for doing business in Asia. Australian seafood exporters conducting business in Asia need to understand the Asian culture and ensure that they do not apply their own Australian value system when communicating and negotiating with people from Asia. This section provides valuable information about Asian culture and business practices.
- ? A list of key contacts is also included to help potential exporters identify points of contact both in the overseas market and domestically.

### **Launch and Promotion**

The export guide was launched on 29 November 2002 at the Seafood Directions Conference. To co-ordinate with the launch a brochure and order form was developed promoting both the Under-utilised seafood to Asia export guide as well as the Asian Festivals guide. This brochure was mailed out to industry. The export guide is being sold through Seafood Services Australia, with 1500 copies of the guide printed and available. HIASM received some publicity throughout the duration of the project with articles featured in industry magazines including Supermarket to Asia (now called Global Supermarket), Seafood Australia as well as media present at the launch.

## **COMMERCIAL SALES OF PRODUCT**

### **Research and Identification of Markets**

In-market visits were undertaken by the project team and included interviews with seafood importers, distributors, processors, restaurateurs, supermarket procurement officers, wet market sales staff and other members of the seafood supply chains. Through these visits the project team identified opportunities for some of the 8 species in some of the 6 markets. Notable opportunities identified included Ocean Jacket in China, Spotted Mackerel in Japan and Hussar in Singapore. These species were familiar to market players and consistent with consumer preferences.

### **Sales of Product**

Throughout the project many samples of many species were sent to the targeted markets. Feedback received from these samples, based on the actual species at times met consumers taste preferences but sometimes did not. Feedback on these samples also indicated that at times if the exporter had met the order specifications perhaps an order would have been made. In addition it was difficult for Australian product to be price competitive against



domestic product. Most of the opportunities were for whole frozen product with fresh and processed products (fillets) not price competitive.

Samples of smoked sea mullet were sent and positively received and a trial shipment was ordered but did not eventuate due to the importers concern at costs of production in Australia and the high tariff for processed goods imported into China.

Samples of frozen Ocean Jacket were sent to Tokyo and were positively received. However, the exporter attempted to pressure the buyer into a long-term business relationship and the buyer was scared away.

Opportunities were identified for Ribbonfish in Shanghai, China. The specifications being for eight fillets of ribbonfish to be packaged into 500gram retail packs for sale in Shanghai supermarkets. It was difficult for the project team to located suppliers and when they did the cost per kilogram was in excess of the price the buyer was willing to pay.

Sales of chilled spotted mackerel have occurred in Japan, although with a number of supply hurdles along the way.

#### **PRINTING OF PRODUCT BRIEFS**

Product briefs were developed and printed for the initial 24 under-utilised species selected as part of the research. Although after further research the species were further prioritised down to eight, these colour brochures were still relevant for the project and used in promotion throughout the entire project both during in-market visits and domestic promotions to create awareness of Australian under-utilised seafood species.

These product briefs detail the species physical features, common size, flesh characteristics, how and where caught, supply and availability as well as any other information relevant to the species.

## 8. BENEFITS

The HIASM project was developed to benefit the Australian seafood industry specifically those fishers catching under-utilised seafood species with a view to exporting the product.

The direct benefits of the project are set out below.

- ? Development of an export framework which aims to assist in maximising the economic returns from the sale of under-utilised species. This is imperative to the future growth of the seafood industry.
- ? Awareness raised in the Australian seafood industry that species traditionally considered under-utilised have the potential to be export products, as many of the less popular seafood species in Australia are perceived in a much more favourable light in some Asian nations.
- ? Identification of Australian under-utilised species with the most potential in selected Asian markets and identification of opportunities for these species.
- ? Provision of key market information which will assist in the industry in terms of Asian market requirements, competitor knowledge, distribution channels, niche market opportunities, improved marketing strategy development including branding and a better understanding of impediments to market development.
- ? Case studies encapsulating the experiences gained and lessons learnt by exporters in seeking to establish new export markets for the under-utilised species concerned.
- ? A list of key contacts provided to help exporters identify points of contact both in the overseas market and domestically.
- ? Development of a step by step 'how to export' framework for ongoing use by seafood marketers.
- ? Identification of Australian under-utilised seafood exporters' inability to consistently supply quality product for export markets.
- ? Identification of the need for fishers to work together in order to overcome supply constraints to achieve export sales of under-utilised species.

## 9. FURTHER DEVELOPMENT

The research conducted as part of the HIASM project identified a number of opportunities for these species, which can be further developed.

Further promotion of Australian under-utilised species as an import replacement product to relevant supply chain members of the Asian seafood industry is crucial if trade is to be achieved. These species can be promoted in the Asian market as a quality alternative to other imported products.

Awareness needs to be further raised among the Australian seafood industry that species traditionally considered under-utilised have the potential to be caught in significant volumes and exported to the potentially lucrative Asian market. The brochures developed as part of the project could be used as a promotional tool for exporters.

In order to maintain and increase an effective market presence in Asia, research into maximising returns on existing products, new market research, competitor analysis and new species research needs to be undertaken.

However, despite these opportunities for the species, a key impediment identified by the project was the lack of consistent, quality supply of the product. A further issue was that often Australian product could not compete on price against the local product or cheap imports.

Further development of the under-utilised seafood industry and the ability to supply export markets will require exporters to work together. Marketing groups and alliances will enable Australian exporters to compete in the global marketplace with a ready and consistent supply of quality product. The challenge for exporters will be to match the capability to supply under-utilised Australian seafood products with the specific requirements of various Asian seafood markets.

In the long term the identification and adoption of the opportunities identified in the research undertaken have real potential to develop new export markets. It is hoped that these findings have encouraged more efficient use of fisheries products and generate new sources of income for the fishing and seafood industries.

## 10. PLANNED OUTCOMES

The HIASM project had a number of planned outcomes, set out below, which were achieved through the projects outputs, 'Under-utilised seafood to Asia – a guide for Australian seafood exporters' and the product brief brochures.

- ? Australian under-utilised species with the most potential in selected Asian market and identify and research opportunities for these species were identified.
- ? Awareness was raised in the Australian seafood industry that species traditionally considered under-utilised have the potential to be export products, as many of the less popular seafood species in Australia are perceived in a much more favourable light in some Asian nations.
- ? Results of in-market research and key market information were delivered on Asian seafood consumption trends and preferences; market segment opportunities, competition, market entry restrictions and distribution networks.
- ? A list of key contacts to help them identify points of contact both in the overseas market and domestically was provided.
- ? A 'how to export' framework for ongoing use by seafood marketers was developed.
- ? A promotional tool to assist with promoting, profiling and developing Australian under-utilised seafood species as an export product was developed.
- ? Sales of an Australian under-utilised seafood species, spotted mackerel were achieved.

## 11. CONCLUSIONS

The projects objectives to develop an export guide for under utilised seafood species, achieve sales of under-utilised species and print product briefs for the same species have enabled the project team to achieve the planned outcomes.

The development of an export guide for Australian under-utilised seafood specific to Asia has profiled under-utilised species as more than just by-catch, identified opportunities for these species in the Asian market and identified supply weaknesses of these species in the industry.

The product briefs proved to be practical in creating awareness of and promoting Australian under-utilised species.

The project has also created interested from Asian importers, supermarkets, and restaurants in sourcing Australian product from both the higher and lower ends of the market. There is scope to follow up samples and trial shipment with further communications may lead to trade development.

However, despite these opportunities for the species, a key impediment identified by the project was the lack of consistent, quality supply of the product. A further issue was that often Australian product could not compete on price against the local product or cheap imports.

Further development of the under-utilised seafood industry and the ability to supply export markets will require exporters to work together. Marketing groups and alliances will enable Australian exporters to compete in the global marketplace with a ready and consistent supply of quality product. The challenge for exporters will be to match the capability to supply under-utilised Australian seafood products with the specific requirements of various Asian seafood markets.

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**APPENDIX 1:**

## **APPENDIX 2: STAFF**

The following staff were involved in phase one of the 'Hooking into Asian Seafood Markets' project:

Francine Brown

Jeremy Chen

Carolynn Jamison

Grace Lin

Peter McDonald

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The following staff were involved in phase two of the project:

Kevin Smith

Kellie McCallum

Eliza Wilson

Kristy Howes

Warwick Lee