



# Potential for imports of fresh meat and seafood into Australia

ABARES report to client for Food Standards Australia New Zealand

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# Summary

- The Australian beef and sheep meat industries are highly export oriented, with around 65 per cent and 58 per cent of production exported, respectively. The other Australian industries examined in this report are less export oriented, with around 20 per cent of edible seafood production exported, 16 per cent of pig meat production and 4 per cent of chicken meat production.
- Fresh, chilled and frozen imports of beef and sheep meat account for only a small proportion of Australia's consumption. In recent years, fresh beef imports have accounted for around 0.5 per cent of Australian beef consumption, while sheep meat imports accounted for 0.2 per cent of Australian sheep meat consumption.
- Australia does not import any fresh chicken meat because of quarantine restrictions, which are intended to prevent the entry of particular diseases that could affect the Australian chicken flock.
- Imports of edible seafood and pig meat account for around half of Australia's consumption of these products. Frozen boneless pig meat, which must be processed on arrival under quarantine control into products such as ham and bacon, accounts for the majority of pig meat imports. Fresh edible seafood imports account for 25 per cent of Australia's seafood consumption.
- Australia's cattle herd and sheep flock are expected to gradually increase over the medium term. This is based on the assumption of favourable seasonal conditions and projected continued strong demand in Australia's major export markets for beef, mutton and lamb. Export volumes of these products are expected to increase over this period.
- The combined effects of domestic beef and sheep meat production significantly exceeding domestic consumption and the competitiveness of Australian product in international markets have led to only relatively small amounts of fresh beef and sheep meat imports into Australia. This is expected to remain so in the medium term to 2015–16.
- Pig meat imports are projected to increase by around 17 per cent between 2010–11 and 2015–16 because of continued strong demand from Australian pig meat processors as a result of an assumed relatively high Australian dollar and competitive costs of production in countries able to export pig meat to Australia, such as Canada, the United States and Denmark.
- ABARES does not produce medium-term projections for Australian seafood production and consumption. However, imports of fish, crustaceans and molluscs are expected to rise over the next five years as the assumed relatively high Australian dollar is likely to support growth in import demand toward 2015–16.

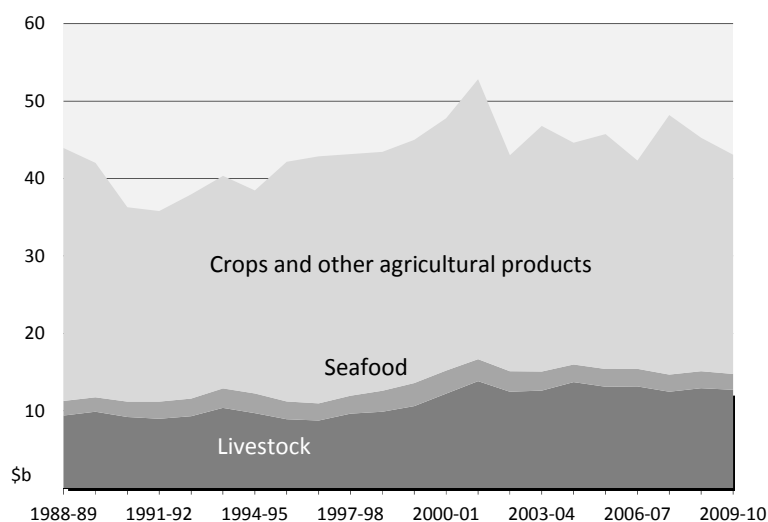
# 1 Introduction

Food Standards Australia New Zealand (FSANZ) requested ABARES to provide a report on the Australian market for fresh meat (beef, sheep meat, pig meat and chicken meat), fresh fish, crustaceans and molluscs, with a focus on the penetration of imports into these markets.

## 2 General profile

The gross value of Australian meat and seafood production contributes around 34 per cent of the total gross value of agricultural and seafood production, and in 2009–10 was valued at around \$14.8 billion (figure 1).

Figure 1: Gross value of agricultural production (2009–10 values)

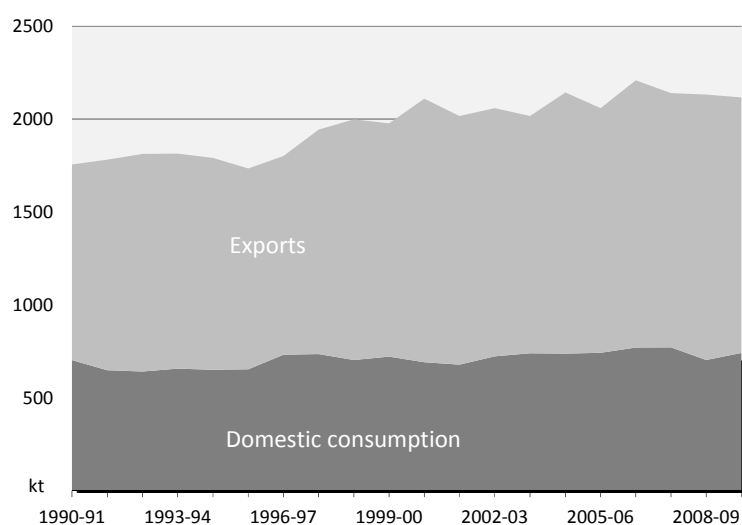


Over the five years to 2009–10, beef and veal production averaged 2 144 000 tonnes a year, while sheep meat production averaged 638 000 tonnes. The Australian beef and sheep meat industries are highly export oriented (figures 2 and 3). Over the past five years, on average, around 65 per cent of Australia’s beef production and around 58 per cent of Australia’s sheep meat production was exported. Over this period, Australia exported beef and sheep meat to more than 130 countries. Australia’s principal export markets for beef are Japan, the United States and the Republic of Korea, which accounted for an average of 40 per cent, 28 per cent and 14 per cent, respectively, of Australia’s exports by volume in the five years to 2009–10. Australia is also an exporter of live cattle, mainly for slaughter. Australia’s principal export market is Indonesia and in the last five years, accounted for around 76 per cent of exports by volume.

Australia's principal export markets for sheep meat are the United States, Saudi Arabia, the European Union, China, Japan, Papua New Guinea and the United Arab Emirates. The United States accounted for an average of 18 per cent of Australia's exports by volume in the five years to 2009–10. In comparison, Saudi Arabia, the European Union and China each accounted for 7 per cent, Japan for 6 per cent, Papua New Guinea for 5 per cent and the United Arab Emirates for 4 per cent. Australia is also an exporter of live sheep, mainly for slaughter. Australia's principal export markets for live sheep are Saudi Arabia, Kuwait, Bahrain, Jordan and Oman. These markets combined accounted for nearly 90 per cent of exports by volume over the past five years.

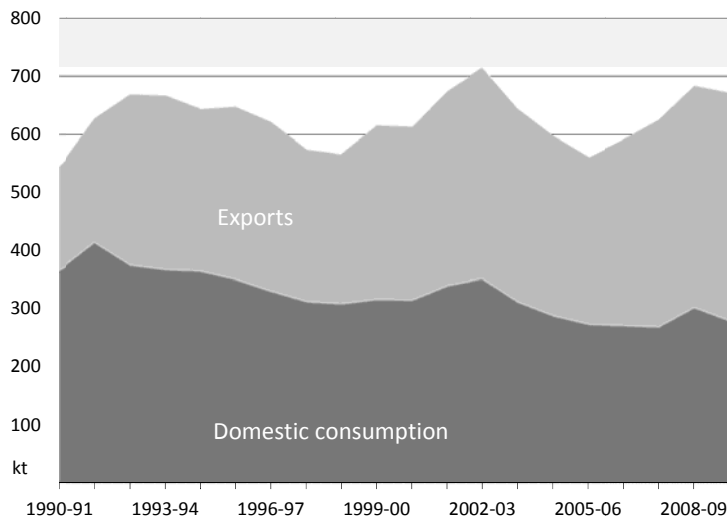
Over the five years to 2009–10, poultry production in Australia averaged 857 000 tonnes a year. Over the same period, Australia exported a relatively small share of poultry production to more than 60 countries. On average, around 4 per cent of Australia's chicken meat production has been exported over the past five years (figure 4), with South Africa accounting for 33 per cent of exports by volume, Hong Kong for 21 per cent, the Philippines for 18 per cent, Papua New Guinea for 6 per cent and Vietnam for 5 per cent.

**Figure 2: Disposal of Australian beef and veal production**



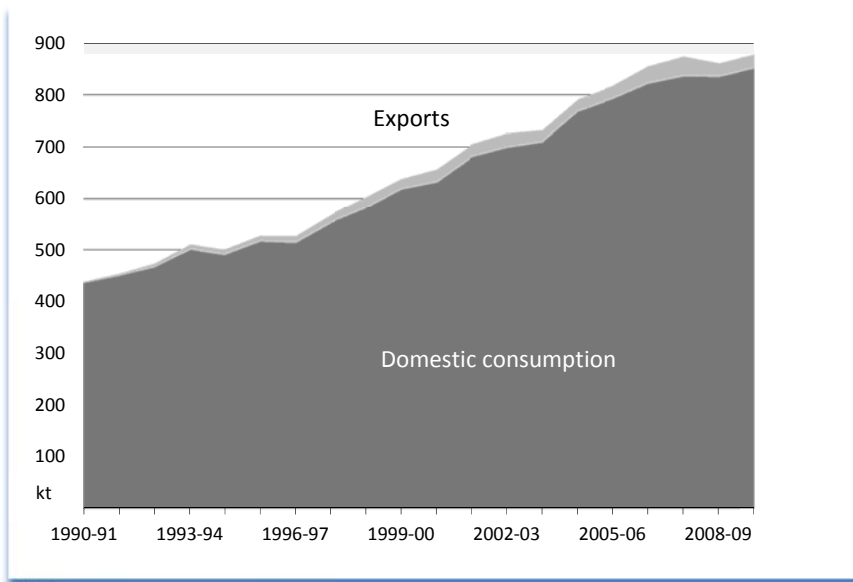
*Note:* carcass weight equivalent.

Figure 3: Disposal of Australian sheep meat production



Note: carcass weight equivalent.

Figure 4: Disposal of Australian poultry production

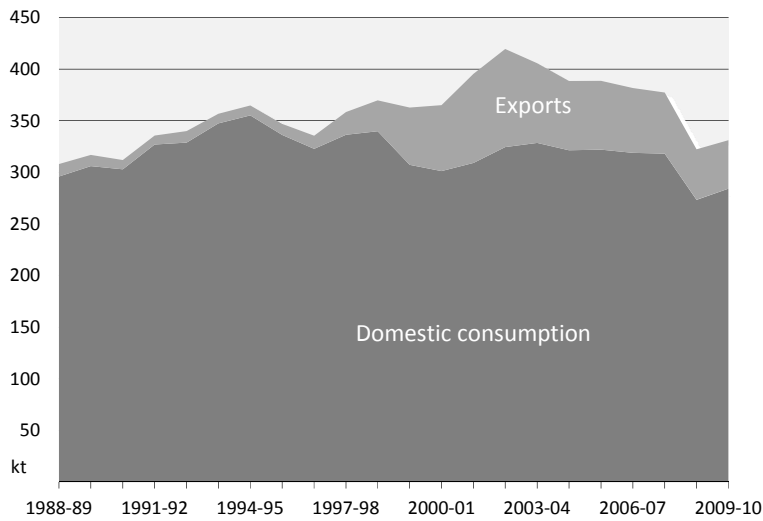


Note: carcass weight equivalent.

Australian pig meat production has averaged 360 000 tonnes a year over the five years to 2009–10. Although Australian pig meat exports averaged around 16 per cent of production over the past five years (figure 5), Australia has become a net importer of pig meat since the mid-1990s (discussed in more detail later). Australia exported pig meat to more than 50 countries over the past five years, with Singapore accounting, on average, for 51 per cent of exports by volume and New Zealand accounting for 24 per cent.



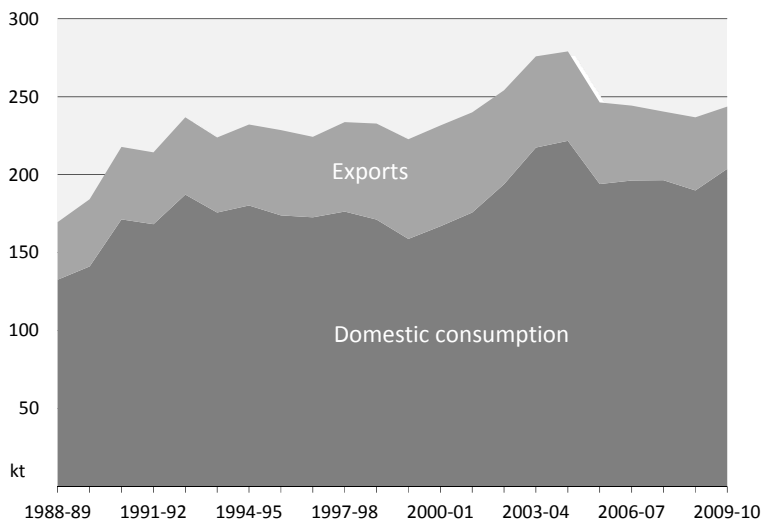
**Figure 5: Disposal of Australian pig meat production**



*Note:* carcass weight equivalent.

Over the five years to 2009–10, Australia produced, on average, around 242 000 tonnes of fish and seafood. In 2009–10, the gross value of Australian fish and seafood production was around \$2.3 billion. Of the fish and seafood produced, Australian exports averaged around 48 000 tonnes of edible product a year over the past five years, or 20 per cent of production (figure 6). Australia exported fish and seafood to more than 90 countries over this period, with Japan, Hong Kong, China, the United States, New Zealand, Chinese Taipei and Thailand being the top seven destinations by volume (ABARE–BRS 2010).

**Figure 6: Disposal of Australian seafood production**

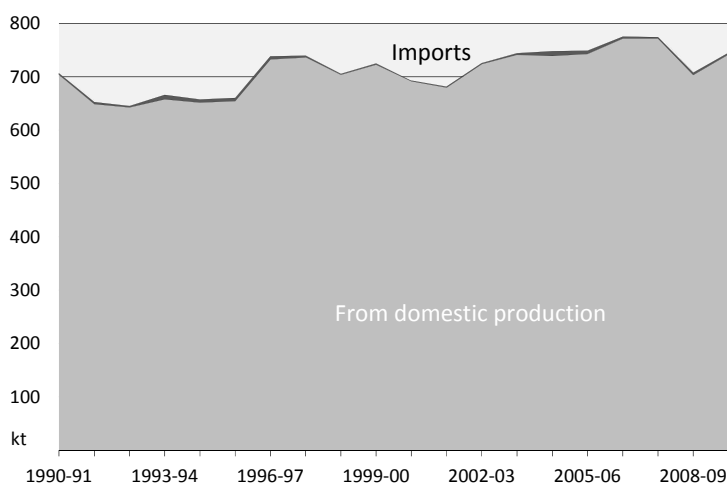


### 3 Imports of meat and seafood

The following analysis mainly focuses on fresh chilled and frozen products entering Australia. In some cases, more highly processed product is included in the analysis. For example, the fish and seafood categories include more highly processed product because of the way the Australian Bureau of Statistics categorises seafood. A full list of all import codes included in the analysis is provided in Appendix A.

Fresh, chilled and frozen beef imports in carcass weight equivalent terms account for only around 0.5 per cent of Australia's total beef consumption (figure 7).

Figure 7: Total Australian beef consumption



Note: carcass weight equivalent.

Average imports of fresh, chilled and frozen beef over the past five years to 2009–10 were around 4000 tonnes (carcass weight equivalent) a year. Over the past 22 years to 2009–10, Australia imported fresh, chilled and frozen beef from only nine countries (table 1). Over this time, the largest volume of fresh, chilled and frozen beef imports was in 1993–94 when around 8300 tonnes (carcass weight equivalent) were imported. This accounted for 1.2 per cent of Australian meat consumption in that year.

During the past five years, beef has been imported from only New Zealand (at an average of 2070 tonnes a year shipped weight) and Vanuatu (at an average of 92 tonnes a year shipped weight), with New Zealand accounting for more than 95 per cent of imports during this period. At present, these are the only countries that can export fresh beef to Australia as they are the only countries that meet Australia's food safety and animal quarantine requirements.

Before 2005–06, in addition to the above countries, imports of between 10 and 293 tonnes shipped weight of fresh, chilled and frozen beef were imported from the United States, with other small amounts from Brazil, Canada, Fiji, Indonesia, Japan and Mozambique. The quantities of imported fresh beef from the United States, which ceased at the end of 2003, were mainly for speciality restaurants (DAFF 2009).

**Table 1 Australian imports of fresh chilled and frozen beef: shipped weight (tonnes)**

	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
New Zealand	5059.3	1924.3	2571.3	2538.9	1752.4	5033.8	3277.5	3701.3	3604.6	1842.5	1047.8
Share %	99.9	99.9	99.8	97.7	98.2	97.1	91.8	93.0	95.3	95.3	100
Vanuatu											
Share %											
United States	2.3	1.4	2.7			118.3	292.8	238.5	177.8	17.4	
Share %	0.05	0.1	0.1			2.3	8.2	6.0	4.7	0.9	
Brazil											
Canada				47.3	32.2		0.6	18.4			
Fiji	0.1										
Indonesia										72.6	
Japan	2.8		2.0			30.6		0.5	0.4	0.3	
Mozambique				11.3							
Total	5064.6	1925.8	2576	2597.5	1784.7	5182.7	3570.8	3958.2	3782.9	1932.8	1048.1

continued

Table 1 Australian imports of fresh chilled and frozen beef: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
New Zealand	1491.4	820.9	1019.1	1090.1	2255.9	5794.2	3834.6	2042.2	1286.4	1274.4	1917.7
Share %	99.1	98.7	92.2	94.7	99.4	98.7	95.9	92.6	95.0	97.8	98.1
Vanuatu						53.7	163.2	163.2	68.2	28.3	38.0
Share %						0.9	4.1	7.4	5.0	2.2	1.9
United States	13.7	10.0	72.7	61.4	12.5	<b>a</b>					
Share %	0.9	1.2	6.6	5.3	0.6						
Brazil						0.5					
Canada			13.3								
Fiji											
Indonesia											
Japan	0.3	0.4	0.2								
Mozambique											
Total	1505.3	831.3	1105.3	1151.5	2268.4	5872.0	3997.8	2205.5	1354.6	1299.7	1955.7

**a** ABS reported that 23.5 tonnes of beef were imported in 2005-06, but this is believed to be an error as a complete ban was in place from the end of 2003 (see explanation on page 13).

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

In 2001, the Australian Government introduced a ban on the domestic sale of beef and beef products from any country that had a confirmed case of bovine spongiform encephalopathy (BSE or 'mad cow disease'). Following the announcement of cases of BSE in Canada and then the United States, Australia prohibited the importation of beef and beef products that had been manufactured or derived from animals slaughtered in Canada after 21 May 2003 (Imported Food Notice 11/03 dated 22 May 2003) or in the United States after 29 December 2003 (Imported Food Inspection Scheme Notice 40/03 dated 31 December 2003).

Following the ban on fresh US beef entering Australia at the end of 2003, ABS statistics show that 23.5 tonnes of frozen boneless beef were exported from the United States to Australia in March 2005. However, the Department of Agriculture, Fisheries and Forestry believes this shipment to be incorrect as the Australian Quarantine and Inspection Service (AQIS) has not issued any import permits for US beef from cattle slaughtered after December 2003 and a US Government representative has publicly confirmed that the reported imports did not occur (DAFF 2011a).

On 1 March 2010, the Australian Government implemented a new policy for beef imports. The new policy allows all countries, including those that have experienced cases of BSE, to apply to export beef to Australia. However, no new trade in fresh beef will commence from a country under the new arrangements until Food Standards Australia New Zealand (FSANZ) has completed its BSE food safety risk assessment of that country and Biosecurity Australia has completed an import risk analysis to assess animal health issues.

Canada, the United States, Japan and the Netherlands have all applied to Biosecurity Australia to export beef to Australia. However, of these countries, only the United States has so far applied to FSANZ for assessment.

The commencement of import risk analyses for beef from the United States, Canada and Japan was announced on 8 April 2010. However, the import risk analysis for beef from Japan was put on hold by Biosecurity Australia on 10 May 2010 as a result of an outbreak of foot and mouth disease in Japan. The import risk analyses for beef from Canada and the United States were also put on hold by Biosecurity Australia on 24 November 2010 and 4 February 2011, respectively (DAFF 2011b). This is to allow time to collect information from those countries on the health status of their cattle and the inspection and certification systems for their beef production. The import risk analysis assessment of the Netherlands has not yet begun.

Looking forward, this trade pattern is not expected to change over the medium term even if the United States, Japan, Canada and the Netherlands were allowed to export to Australia.

The combined effects of Australian beef production significantly exceeding domestic consumption and the competitiveness of Australian beef in international markets (including in markets such as Japan and the United States) has led to minimal beef and beef product imports into Australia. Australia is a competitive manufacturing beef exporter in the United States market and competes head-to-head with the United States and Canada in the North Asian grain-fed beef export markets of Japan and the Republic of Korea. To be able to

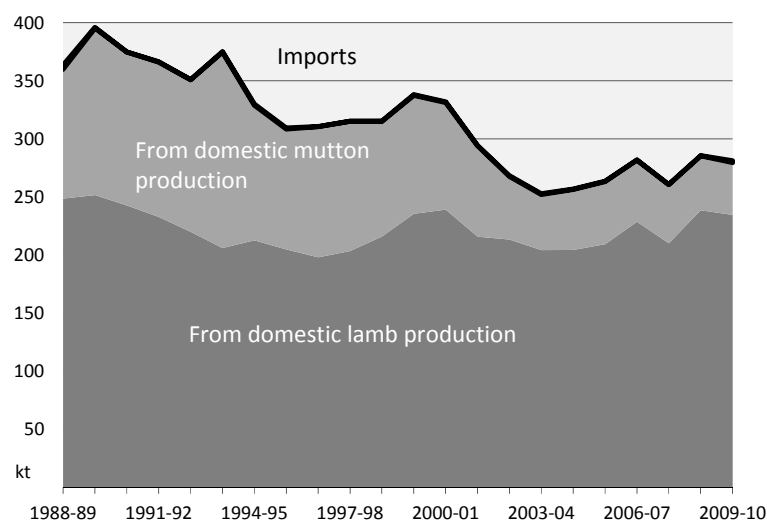
compete on price against Australian product in the Australian domestic market, US and Canadian beef and beef products would have to, at a minimum, overcome the additional costs involved in handling, insurance and freight across the Pacific Ocean.

Furthermore, since both US and Canadian exports to the high-return markets in Japan and the Republic of Korea have been significantly lower than volumes exported prior to the BSE bans in those countries, it is unlikely that large volumes of beef or beef products will be directed to Australia, a market that will deliver relatively lower returns.

Therefore, it is likely that potential US and Canadian beef and beef product exports to Australia over the medium term would be focused, at most, on small, higher-priced niche or speciality market opportunities that are less price sensitive, similar to the small trade flows before 2003.

Similar to beef, fresh, chilled and frozen sheep meat imports account for only a very small percentage of Australia's total sheep meat consumption in carcass weight equivalent terms (figure 8). Over the five years to 2009–10, fresh, chilled and frozen sheep meat imports in carcass weight equivalent terms accounted, on average, for 0.2 per cent of Australia's sheep meat consumption.

**Figure 8: Total Australian sheep meat consumption**



*Note:* carcass weight equivalent.

Average imports of fresh, chilled and frozen sheep meat over the past five years to 2009–10 have been around 470 tonnes (carcass weight equivalent) a year. Imports in shipped weight terms have varied considerably from year to year over the past 22 years to 2009–10 (table 2). Australia has imported fresh, chilled and frozen sheep meat from only nine countries during this period, with the majority of product coming from New Zealand. Import volumes have fluctuated considerably. The highest volume of fresh, chilled and frozen sheep meat imports was in 1988–89 when around 2070 tonnes in shipped weight terms (or 3500 tonnes of carcass weight equivalent) were imported, all from New Zealand. This accounted

for 0.8 per cent of Australian meat consumption in that year. The lowest level of imports occurred in 1992–93 when only 9 tonnes in shipped weight terms were imported (or 16 tonnes carcass weight equivalent).

In the past four years, imports have increased from 76 tonnes (shipped weight) in 2006–07 to 956 tonnes (shipped weight) in 2009–10. This increase occurred at the same time that Australian mutton production fell from 271 000 tonnes to 162 000 tonnes carcass weight. However, given the small amounts of imports over the past 22 years, it is difficult to envisage that a significant increase in imports will occur over the medium term. Similar to beef, sheep meat imports are likely to be focused on small, higher-priced niche or speciality market opportunities.

**Table 2 Australian imports of fresh chilled and frozen sheep meat: shipped weight (tonnes)**

	1988–89	1989–90	1990–91	1991–92	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98	1998–99
New Zealand	2070.4	345.9	60.4	175.0	9.2	275.9	625.8	484.9	75.8	15.9	256.9
Share %	100	100	100	100	100	100	100	100	100	68	100
Qatar											
Share %											
China											
Share %											
Egypt											
Share %											
Japan					0.01						
Russian Federation											
Share %											
Saudi Arabia											
Share %											
Chinese Taipei										7.6	
Share %										32	
United States											
Total	2070.4	345.9	60.4	175.0	9.2	275.9	625.8	484.9	75.8	23.5	256.9

*continued*



Table 2 Australian imports of fresh chilled and frozen sheep meat: shipped weight (tonnes) *continued*

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
New Zealand	297.1	335.4	130.0	366.7	356.8	195.8	156.5	75.7	94.1	131.9	956.3
Share %	100	100	100	100	100	100	71	100	90	91	100
Qatar									10.9		
Share %									7		
China									2.5		
Share %									2		
Egypt						49.7					
Share %						22					
Japan											
Russian Federation						15.7					
Share %						7					
Saudi Arabia									10.6		
Share %									10		
Chinese Taipei											
Share %											
United States								0.4			
Total	297.1	335.4	130.0	366.7	356.8	195.8	222.0	76.0	104.6	145.3	956.3

Source: ABS *International Trade, Australia*, cat. no. 5465.0, Canberra.

Australia does not import any fresh, chilled or frozen chicken meat and edible chicken offal at present. The ABS reported very small amounts of chicken meat imports in the 1990s (table 3). However, according to AQIS (personal communication), the small quantities imported could have been for trade fairs or diplomatic dinners, which are conducted under quarantine control (AQIS officers present, waste managed as quarantine waste and no 'doggy bags' allowed), or small samples imported for in vitro analysis in a Quarantine Approved Premises. The larger quantities would appear to be errors due to miscoding. This could be product that is returning Australian goods or canned (retorted) product.

**Table 3 Australian imports of chicken meat and fresh edible offal: shipped weight (tonnes)**

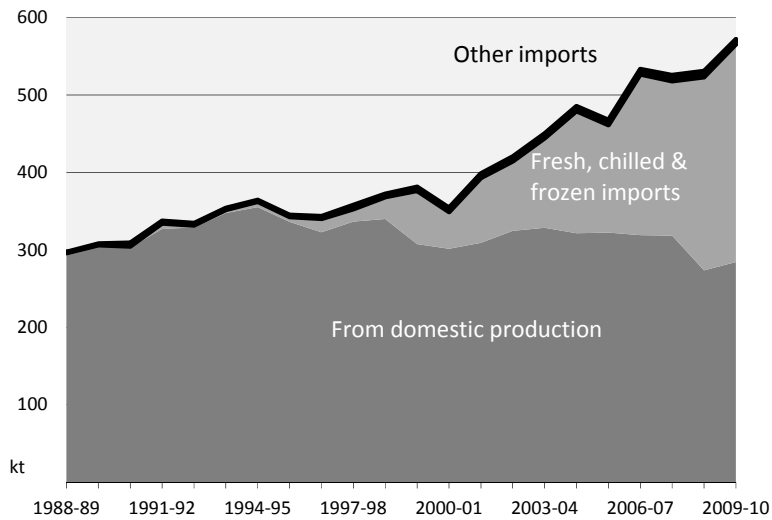
	1990–91	1991–92	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98
Fiji		50						
New Zealand							230	105
South Africa						32200		
United Kingdom								3
United States				50	46			33
Vietnam	20						100	
Total	20	50		50	46	32200	330	141

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

Australia has been a net importer of pig meat since the mid-1990s. Fresh, chilled and frozen pig meat imports have increased from around 8000 tonnes (carcass weight equivalent) in 1994–95 to nearly 290 000 tonnes (carcass weight equivalent) in 2009–10. In 1994–95, pig meat imports accounted for 2 per cent of Australia's pig meat consumption (figure 9). In 2009–10, the import share of Australian consumption had reached nearly 50 per cent. Frozen boneless pig meat, which must be processed on arrival under quarantine control into products such as ham and bacon, accounts for the majority of imports. According to industry sources, imports account for around 70 per cent of processed pig meat consumed in Australia. By contrast the fresh pig meat market is fully serviced by domestic production.

Over the past 22 years to 2009–10, pig meat has been imported from 12 countries (table 4). However, nearly all of Australia's imports originate from three countries, namely Denmark, Canada and the United States. Pig production in these countries is cost-competitive relative to Australian production, especially with respect to feed costs, which typically account for between 50 and 60 per cent of the total cost of pig production (Sheales, Apted and Ashton 2004). Canadian and US pig producers mainly feed their pigs relatively low-cost corn and soybeans (locally produced and imported from Brazil), whereas Australian producers are dependent on relatively high-cost domestic milling quality wheat. Australia does not have enough reliable rainfall for large-scale corn and soybean production or the ability to import feed cereal grain except in limited circumstances because of quarantine restrictions that are intended to prevent the entry of plant diseases and weeds.

Figure 9: Total Australian pig meat consumption



Note: carcass weight equivalent.

Another factor contributing to import competition is the exchange rate. Since 2001–02, the Australian exchange rate has increased significantly against international currencies. A rising Australian dollar has contributed to greater imports as prices paid by processors for imported product have fallen. For example the Australian dollar rose from an average of US52.4 cents in 2001–02 to US95.8 cents in 2010–11, an increase of 83 per cent.

As a result of the above factors, it is expected that pig meat imports will continue to increase in the future, although the rate of growth will be slower than has occurred in the past 10 years as the share of imports in the Australian processed pig meat market is already high. Pig meat imports currently account for around 70 per cent of the processed pig meat market in Australia.

Australia has imported fresh, chilled or frozen offal and other fresh edible meat products from 18 countries over the past 22 years to 2009–10 (table 5). During this period, imports have varied from 76 tonnes (shipped weight) in 1996–97 to 2051 tonnes in 2006–07. The major sources of imports over the past five years to 2009–10 were Denmark, New Zealand, Canada and the United States. The main product imported in recent years was pig fat free of lean meat and poultry fat (excluding rendered or otherwise extracted), fresh, chilled, frozen, salted, in brine, dried or smoked (HS 0209.00.00.15). No data are available on domestic consumption of offal and other edible meat products. Therefore it is not possible to assess the proportion of consumption that these imports account for. It is also difficult to estimate the amount of these products that will be imported in the future.

**Table 4 Australian imports of fresh chilled and frozen pig meat: shipped weight (tonnes)**

	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
Denmark											750
Share %											5
Canada			1009	4003	1572	2041	3470	3168	8599	8082	13279
Share %			100	99	99	96	100	99	99	100	95
United States								35	47		
Share%											
Germany											
Finland											
Sweden											
Spain											
China									17.5		
Italy											
New Zealand	3			30	16	96	15			3	
Philippines									18		
United Kingdom								7.7			
Total	3		1009	4033	1588	2137	3485	3211	8682	8085	14030

*continued*

Table 4 Australian imports of fresh chilled and frozen pig meat: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
Denmark	16548	9830	16982	13683	25553	27215	24404	36662	31056	42024	49996
Share %	48	41	41	30	44	34	35	35	31	34	36
Canada	17714	13964	24930	31288	32277	38453	29081	40884	37287	42231	45666
Share %	52	59	59	70	56	49	42	39	37	34	32
United States						13252	16190	26377	31473	40578	45033
Share %						17	23	25	32	32	32
Germany						26		49			24
Finland								0.15			24
Sweden										25	24
Spain								8	4	1	2
China											
Italy								0.2	1.2	15.2	
New Zealand	88		13		36						
Philippines											
United Kingdom											
Total	34350	23795	41926	44971	57867	78945	69674	103981	99821	124874	140770

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra

Table 5 Australian imports of fresh chilled and frozen offal and other edible meat products: shipped weight (tonnes)

	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
Denmark	9	11									
Share%	4	3									
New Zealand	198	301	121	147	215	273	222	166	23	94	255
Share%	96	96	86	69	94	81	69	83	31	68	76
Canada			15	50			17		0.03		
Share%			10	24			5		0.04		
United States						0.1	0.002		5	0.03	3
Share%						0.03	0.001		7	0.02	1
Republic of Korea											
PNG			2	14	11	64	79	26	44	27	70
France											
Austria							0.1				
China							0.2	1			0.6
Hong Kong	0.003	0.2	3	0.3	1	1	1	0.6	0.1		
Indonesia			0.01	0.1					0.2	0.2	0.2
Ireland		2									
Japan		0.01		0.02		0.4					
Malaysia											1
New Caledonia					1						
South Africa										16	
United Kingdom							0.2	0.3	0.2		
Vietnam			0.1	0.4	0.4		0.2	6	0.2		5
Total	207	314	141	212	229	339	320	199	73	138	336

*continued*

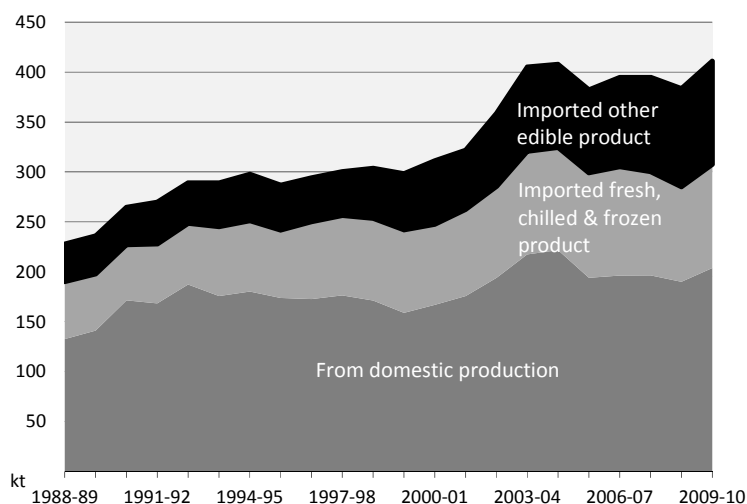
Table 5 Australian imports of fresh chilled and frozen offal and other edible meat products: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
Denmark						200	200	351	1074	1045	514
Share%						10	10	27	70	54	27
New Zealand	167	202	74	171	355	1634	1667	849	87	15	102
Share%	87	81	57	86	92	85	81	65	6	1	5
Canada							163	100	194	578	1181
Share%							8	8	13	30	61
United States	2		0.1			37			170	27	126
Share%	1		0.04			2			11	1	7
Republic of Korea										17	
PNG	23	46	56	28	29	41	21	8			
France						0.09		0.3	0.5	12	
Austria											
China											
Hong Kong											
Indonesia	0.2	0.2	0.1	0.1							
Ireland											
Japan											
Malaysia											
New Caledonia											
South Africa											
United Kingdom											
Vietnam											
Total	191	248	130	199	384	1912	2051	1309	1526	1933	1924

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

Historically, Australia has been a net importer of fisheries products in volume terms but a net exporter in value terms. The disparity reflects the composition of Australian fisheries exports compared with imports. Australian fisheries exports are dominated by high-value species such as rock lobster, tuna and abalone, while imports largely consist of lower-value products such as frozen fish fillets, canned fish and frozen prawns. In recent years the gap between exports and imports in value terms has closed in part as a result of lower export volumes and an appreciating Australian dollar exchange rate which has led to increased demand for imported product. In 2007–08, Australia became a net importer of fisheries products in value terms for the first time and has remained so. Over the past five years to 2009–10, Australia imported, on average, just under 200 000 tonnes of edible fisheries products. Over the past 22 years, the import share of Australian seafood consumption has increased from 40 per cent to around 50 per cent, with around half of these imports being fresh, chilled or frozen product in recent years (figure 10).

**Figure 10: Total Australian edible fisheries product consumption**



Over the same period, Australia imported fresh, chilled or frozen fish, crustaceans and molluscs from nearly 120 countries. The major importing countries are shown in tables 6, 7 and 8. Between 1990–91 and 2009–10, fish imports rose by 56 per cent. Although crustacean imports fell to just under 20 000 tonnes in 2009–10 as a result of tighter quarantine measures for raw prawns, between 1989–90 and 2006–07 crustacean imports grew by 350 per cent. Similar to crustaceans, mollusc imports declined slightly in 2009–10. However, between 1988–89 and 2008–09 mollusc imports grew by nearly 250 per cent.

The top five importing sources for fresh, chilled or frozen fish, crustaceans and molluscs over the past five years were New Zealand, Vietnam, China, Thailand and Chinese Taipei.

Similar to pig meat, the appreciation of the Australian dollar since 2001 has made seafood imports cheaper, and as a result imported product has become an established part of the Australian seafood market. Over the medium term, demand for these low-value products is expected to remain strong, assuming the Australian dollar remains high, although the recent introduction of tighter quarantine measures may reduce the quantity of raw prawn imports from some South-East Asian countries.



**Table 6 Australian imports of fish: shipped weight (tonnes)**

	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
New Zealand	8881	8652	11162	13355	13613	17060	16711	16633	19288	21978	22260
Share %	20	21	29	31	30	33	34	36	35	39	39
Vietnam	1035	812	1064	1431	1549	2219	2019	1647	1561	1501	1350
Share %	2	2	3	3	3	4	4	4	3	3	2
Chinese Taipei	603	635	846	1101	724	808	752	1217	1353	1800	1109
Share %	1	2	2	3	2	2	2	3	2	3	2
China	97	271	179	219	256	289	337	356	436	663	739
Share %	0.2	0.6	0.5	0.5	0.6	0.6	0.7	0.8	0.8	1	1
Argentina	4063	3190	3066	2554	3289	3150	616	978	155	100	196
Share %	9	8	8	6	7	6	1	2	0.3	0.2	0.3
South Africa		15		64	106	1217	2449	2203	2371	5200	6177
Indonesia	114	145	137	279	250	220	365	423	673	1933	814
Thailand	770	1518	1510	3216	2266	1913	1319	1430	1429	1678	2526
Namibia			15	29	335	302	832	1095	1971	1641	1908
United States	1481	1246	320	153	438	808	3637	628	6580	269	875
Myanmar					119	283	332	444	644	803	405
Kenya	252	673	864	874	969	1274	1600	1377	1036	2120	2982
Chile	5238	5602	5485	5599	5498	5202	4864	5244	5454	5801	5092
Norway	63	45	34	32	47	108	169	86	51	53	55
Tanzania						34	272	519	932	786	617
India	7	23	8	130	127	101	122	230	365	345	537
Uganda				42	126	338	701	1250	952	1184	1227
Malaysia	93	87	134	67	114	86	53	71	77	64	145
Canada	1033	1519	907	308	112	34	1		22	89	
Fiji	13	12	5	2	6	34	33	59	800	29	29
Other	19854	17343	13399	13487	15103	15689	11665	10048	8835	8212	8364
Total	43597	41789	39135	42945	45049	51171	48848	45938	54986	56250	57407

*Continued*

Table 6 Australian imports of fish: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
New Zealand	20707	22815	22876	23911	24248	18007	17172	18943	20709	20193	19903
Share %	38	42	40	40	38	30	29	32	34	35	33
Vietnam	1787	1842	1791	3307	6439	9615	12001	12274	15113	15141	16631
Share %	3	3	3	6	10	16	20	21	24	26	27
Chinese Taipei	798	944	1391	1379	1862	2412	2844	3019	4111	4004	4592
Share %	1	2	2	2	3	4	5	5	7	7	8
China	799	969	1602	2185	2184	2501	2962	4657	3375	2792	4113
Share %	1	2	3	4	3	4	5	8	5	5	7
Argentina	1012	492	467	1995	2274	3726	5049	3622	3087	1627	1629
Share %	2	1	1	3	4	6	8	6	5	3	3
South Africa	6241	6261	6358	5380	5469	4890	2751	3188	2518	2448	3415
Indonesia	852	1561	1704	2833	1743	1315	1580	2180	2269	1903	1924
Thailand	3010	2323	1804	1501	2315	2287	2527	2097	2308	1438	1355
Namibia	1782	1739	1506	1781	1307	2006	1842	2090	1368	1783	1378
United States	750	964	1286	877	1786	3054	2028	1305	1227	1051	975
Myanmar	687	664	823	1269	1421	1520	1261	1505	1180	850	760
Kenya	2630	2234	2443	2102	2725	2077	2046	1209	845	539	850
Chile	5483	4605	5789	4924	4452	2846	1713	382	447	443	105
Norway	42	42	36	142	277	197	453	492	719	547	651
Tanzania	855	834	1228	459	375	335	683	563	432	490	256
India	467	558	430	522	592	132	260	271	276	565	928
Uganda	3844	3544	1826	1674	1691	803	621	778	289	146	137
Malaysia	195	126	53	94	621	553	227	176	193	138	343
Canada	324	32		125	51	179	314	148	124	63	4
Fiji	14	16	50	54	79	193	168	86	138	105	120
Other	2341	1670	4368	3540	2420	1110	1088	693	996	902	1141
Total	54621	54234	57832	60055	64332	59761	59591	59678	61723	57167	61210

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

**Table 7 Australian imports of crustaceans: shipped weight (tonnes)**

	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99
China	165	158	92	16	100	101	159	251	73	41	30
Share %	2	3	1	0.2	1	1	2	3	1	0.4	0.3
Thailand	1622	1856	2181	2302	2155	2739	4477	4728	5429	5643	5511
Share %	23	29	27	30	30	33	46	55	58	59	53
Vietnam	986	739	801	1158	1074	766	903	721	849	733	1249
Share %	14	12	10	15	15	9	9	8	9	8	12
Malaysia	1287	1451	2019	1719	1560	1805	1527	895	744	699	666
Share %	19	23	25	23	22	22	16	10	8	7	6
India	253	236	191	199	180	206	239	217	147	543	965
Share %	4	4	2	3	3	3	2	3	2	6	9
Indonesia	509	493	1003	660	379	354	375	330	265	377	423
Share %	7	8	12	9	5	4	4	4	3	4	4
Myanmar	29	75	297	252	782	801	589	318	381	243	417
Saudi Arabia					7					0.01	
Chinese Taipei	274	93	186	73	23	15	84	52	176	118	45
PNG	149	76	76	173	68	96	160	143	158	115	153
Cuba			24			62	283	43	182	63	49
United States	24	12	16	17	11	37	35	41	48	134	93
Singapore	521	277	294	303	284	409	449	375	442	437	268
New Caledonia	55	102	194	146	169	108	129	225	221	245	432
Japan	117	116	94	47	13	11	2	12	1	6	10
Other	939	632	682	494	349	667	283	257	166	216	179
Total	6931	6318	8149	7559	7155	8178	9694	8609	9284	9612	10491

*continued*

Table 7 Australian imports of crustaceans: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
China	83	167	403	554	3922	4081	4506	8506	5501	3547	5776
Share %	1	2	3	4	20	18	19	32	27	26	30
Thailand	6038	4071	3898	3836	5125	5927	6485	5761	5015	3921	5239
Share %	53	37	31	28	26	26	27	21	25	28	27
Vietnam	1377	1443	1952	2946	3996	6373	6955	7352	5141	2910	2703
Share %	12	13	16	22	21	27	29	27	26	21	14
Malaysia	820	752	674	426	248	246	226	583	1675	1854	2222
Share %	7	7	5	3	1	1	1	2	8	13	12
India	889	1661	2572	2766	2934	3111	2480	2048	1137	136	128
Share %	8	15	21	20	15	13	10	8	6	1	1
Indonesia	584	1216	1536	1680	1719	1858	1278	797	505	817	2051
Share %	5	11	12	12	9	8	5	3	3	6	11
Myanmar	428	596	716	644	571	542	623	633	311	279	268
Saudi Arabia				25	27	230	405	402	327	12	
Chinese Taipei	39	121	69	42	103	99	289	166	75	32	74
PNG	198	226	211	242	286	141	93	119	112	74	85
Cuba	41	38	14	27		31	64	174	81	55	23
United States	177	36	43	100		110	16	75	23	72	188
Singapore	211	235	93	144	214	102	163	80	3	27	
New Caledonia	306	186	184	123	104	191	100	74	7	33	33
Japan		16	1	59	64	40	50	57	31	4	40
Other	149	138	153	80	79	146	153	115	114	97	226
Total	11340	10904	12521	13696	19391	23229	23887	26944	20059	13871	19057

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

**Table 8 Australian imports of crustaceans: shipped weight (tonnes)**

	1988–89	1989–90	1990–91	1991–92	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98	1998–99
China	112	81	93	69	104	286	638	871	407	736	565
Share %	2	1	1	1	1	3	5	7	3	5	4
New Zealand	2906	3633	3166	3562	4366	4423	5983	5540	4862	4918	5291
Share %	42	42	38	40	49	45	49	42	38	35	37
Thailand	1150	1165	1422	1312	1474	1665	2088	2200	2459	2493	2464
Share %	17	13	17	15	17	17	17	17	19	18	17
Vietnam	3	39	58	99	85	53	195	169	327	422	632
Share %	0.05	0.5	1	1	1	1	2	1	3	3	4
Chinese Taipei	508	144	188	937	845	1408	1424	1737	2271	3166	3932
Share %	7	2	2	11	10	14	12	13	18	23	28
Malaysia	81	140	134	137	160	313	409	376	302	334	184
Share %	1	2	2	2	2	3	3	3	2	2	1
Japan	303	928	752	560	374	407	382	586	693	890	533
Indonesia	24	29	20	5	22	11	1	20	53	67	93
United States	400	758	334	502	257	495	397	704	782	312	172
Republic of Korea	341	28	37	62	15	16	8	36	31	25	31
India	137	409	510	438	89	182	191	279	236	307	103
Argentina	13	1	44	16							
Myanmar							2		5		
Chile		55	66	6	1	6	6	3	41	12	1
Peru								104	68	31	0
Singapore	382	487	721	532	440	350	136	169	53	53	24
Other	506	740	766	634	640	319	227	276	368	152	151
Total	6867	8637	8314	8873	8873	9935	12087	13071	12958	13918	14177

*continued*

Table 8 Australian imports of crustaceans: shipped weight (tonnes) *continued*

	1999–2000	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
China	684	1163	2582	3819	4284	6538	6398	7025	7022	8228	8489
Share %	4	8	16	22	22	33	30	32	32	34	36
New Zealand	4682	3545	4551	4784	5825	5190	6750	6143	5584	6984	5295
Share %	28	23	28	27	30	26	31	28	25	29	23
Thailand	3354	2916	2946	2683	3016	2400	2413	2803	2533	2207	2660
Share %	20	19	18	15	15	12	11	13	12	9	11
Vietnam	509	537	640	796	1192	1149	1755	1789	1645	1460	1246
Share %	3	3	4	4	6	6	8	8	7	6	5
Chinese Taipei	4266	4198	2579	2335	2359	1662	1076	1311	1957	1502	1643
Share %	25	27	16	13	12	8	5	6	9	6	7
Malaysia	640	487	615	596	674	661	641	722	576	901	1331
Share %	4	3	4	3	3	3	3	3	3	4	6
Japan	883	849	708	978	739	430	538	377	740	674	701
Indonesia	196	189	85	113	158	205	313	742	218	325	432
United States	461	404	350	230	407	364	333	332	322	239	495
Republic of Korea	300	527	872	769	217	174	136	147	306	401	379
India	284	142	164	106	206	222	258	232	137	256	200
Argentina	11	34	39	102	4	161		20	304	421	5
Myanmar	4	9	6	50	57	157	134	217	156	69	107
Chile	31	10	24	23	43	68	147	48	154	147	27
Peru	91	117		32	106	8	20	57	53	115	204
Singapore	37	61	69	66	37	57	161	181	25	4	13
Other	496	276	91	207	145	241	499	135	262	175	277
Total	16930	15467	16321	17688	19468	19686	21573	22283	21995	24109	23505

Source: ABS, *International Trade, Australia*, cat. no. 5465.0, Canberra.

## 4 Market outlook for Australia

Over the medium term, Australia's cattle herd and sheep flock are projected to increase. Over the five years to 2015–16, the cattle herd is projected to rise by 5 per cent to around 28.7 million head, the sheep flock by 7 per cent to around 73 million head, and the pig herd by 11 per cent to 2.4 million. These projections are based on the assumption of favourable seasonal conditions and an assessment of continued strong demand in Australia's major export markets. Between 2010–11 and 2015–16, beef production is projected to increase by around 10 per cent, sheep meat production by 12 per cent, pig meat production by 7 per cent and chicken meat production by 14 per cent. These projected increases are expected to lead to increased exports for all meats (ABARES 2011).

Total Australian consumption for all meats is projected to increase over the medium term, with beef consumption rising by 13 per cent, sheep meat by 12 per cent, pig meat by 10 per cent and chicken meat by 10 per cent (table 9). While imports of beef and sheep meat are expected to remain at low levels, similar to those attained in recent years, pig meat imports are projected to increase by 17 per cent to around 305 000 tonnes (carcass weight equivalent) in 2015–16, compared with 260 000 tonnes in 2010–11. Continued strong demand from Australian processed pig meat processors, an assumed relatively high Australian dollar and competitive costs of production in Canada, the United States and Denmark (the major sources of Australia's imports), are the reasons for this projected increase in imports, although the rate of growth will be slower than has occurred in the past 10 years.

While no projections for Australian seafood production and consumption are available, as mentioned earlier, imports of fish, crustaceans and molluscs are expected to rise as demand for these low-value products is likely to remain strong, under the assumption of a relatively strong Australian dollar.

**Table 9 Medium term projections for the Australian meat market: thousand tonnes**

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
<b>Beef</b>								
Production	2137	2109	2150	2190	2225	2266	2311	2360
Consumption	696	745	750	813	819	825	834	846
Exports	1429	1376	1342	1364	1353	1428	1465	1502
<b>Sheep meat</b>								
Production	636	574	564	563	573	589	607	630
Consumption	263	242	244	250	258	266	269	273
Exports	373	332	320	313	315	323	338	357
<b>Pig meat</b>								
Production	322	331	333	338	344	349	353	355
Consumption	531	572	548	561	575	588	600	605
Exports	49	47	50	52	54	56	58	60
Imports	251	283	260	270	280	290	300	305
<b>Chicken meat</b>								
Production	866	872	885	910	935	960	985	1010
Consumption	829	838	849	872	895	919	942	933
Exports	45	34	36	38	40	42	43	44

Note: carcass weight equivalent.

Source: ABARES.

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# Appendix A

Harmonised System (HS) codes included in analyses of import penetration into Australian meat and seafood markets in Australia

## Beef

1. Carcasses and half-carcasses of bovine animals, fresh or chilled (HS 0201.10.00.01)
2. Cuts of meat of bovine animals with bone in (excluding carcasses and half-carcasses), fresh or chilled (HS 0201.20.00.02)
3. Boneless meat of bovine animals, fresh or chilled (HS 0201.30.00.03)
4. Carcasses and half-carcasses of bovine animals, frozen (HS 0202.10.00.04)
5. Boneless meat of bovine animals, frozen (HS 0202.20.00.05)
6. Cuts of meat of bovine animals with bone in (excluding carcasses and half-carcasses), frozen (HS 0202.30.00.06)

## Sheep meat

7. Carcasses and half-carcasses of lamb, fresh or chilled (HS 0204.10.00.13)
8. Carcasses and half-carcasses of sheep (excluding lamb), fresh or chilled (HS 0204.21.00.14)
9. Cuts of meat of sheep with bone in (excluding carcasses and half-carcasses), fresh or chilled (HS 0204.22.00.15)
10. Boneless meat of sheep (including lamb), fresh or chilled (HS 0204.23.00.16)
11. Carcasses and half-carcasses of lamb, frozen (HS 0204.30.00.17)
12. Carcasses and half-carcasses of sheep (excluding lamb), frozen (HS 0204.41.00.18)
13. Cuts of meat of sheep with bone in (excluding carcasses and half-carcasses), frozen (HS 0204.42.00.19)
14. Boneless meat of sheep (including lamb), frozen (HS 0204.43.00.20)

## Pig meat

15. Carcasses and half-carcasses of swine, fresh or chilled (HS 0203.11.00.07)
16. Hams, shoulders and cuts thereof, of swine with bone in, fresh or chilled (HS 0203.12.00.08)
17. Meat of swine (excluding carcasses and half-carcasses and hams, shoulders and cuts thereof with bone in), fresh or chilled (HS 0203.19.00.09)
18. Carcasses and half-carcasses of swine, frozen (HS 0203.21.00.10)
19. Hams, shoulders and cuts thereof of swine with bone in, frozen (HS 0203.22.00.11)
20. Meat of swine (excluding carcasses and half-carcasses and hams, shoulders and cuts thereof with bone in), frozen (HS 0203.29.00.12)
21. Meat of swine (excluding carcasses and half-carcasses and hams, shoulder and cuts thereof with bone in), frozen, with bone in (HS 0203.29.00.30)
22. Meat of swine, frozen, boneless, leg cuts (excluding salted, dried or smoked ham) (HS 0203.29.00.40)
23. Meat of swine, frozen, boneless, middle cuts (HS 0203.29.00.41)
24. Meat of swine, frozen, boneless, shoulder cuts (HS 0203.29.00.42)

25. Meat of swine (excluding boneless leg cuts, middle cuts and shoulder cuts), frozen, boneless (HS 0203.29.00.45)

#### Chicken meat

26. Meat and edible offal of fowls of the species *Gallus domesticus*, not cut in pieces, but fresh or chilled (HS 0207.11.00.21)
27. Meat and edible offal of fowls of the species *Gallus domesticus*, not cut in pieces, but frozen (HS 0207.12.00.22)
28. Meat and edible offal of fowls of the species *Gallus domesticus*, cuts and offal, fresh or chilled (HS 0207.13.00.23)
29. Meat and edible offal, of fowls of the species *Gallus domesticus*, cuts and offal, frozen (HS 0207.14.00.24)
30. Meat of fowls of the species *Gallus Domesticus*, not cut in pieces, frozen (HS 0207.21.00.03)
31. Poultry cuts and offal, including livers, (excluding fatty livers of geese or ducks), fresh or chilled (HS 0207.39.00.07)
32. Poultry cuts and offal (excluding livers) of the species *Gallus Domesticus*, frozen (HS 0207.41.00.08)

#### Other meat products

33. Edible offal of bovine animals, fresh or chilled (HS 0206.21.00.23)
34. Tongues of bovine animals, frozen (HS 0206.21.00.24)
35. Livers of bovine animals, frozen (HS 0206.22.00.25)
36. Edible offal of bovine animals (excluding tongues and livers), frozen (HS 0206.29.00.26)
37. Edible offal of swine, fresh or chilled (HS 0206.30.00.27)
38. Livers of swine, frozen (HS 0206.41.00.28)
39. Edible offal of swine (excluding livers), frozen (HS 0206.49.00.29)
40. Edible offal of sheep, goats, horses, asses, mules or hinnies, fresh or chilled (HS 0206.80.00.30)
41. Edible offal of sheep, goats, horses, asses, mules or hinnies, frozen (HS 0206.90.00.01)
42. Meat and edible offal (excluding frogs' legs and meat and edible offal of rabbits or hares) fresh, chilled or frozen (HS 0208.90.00.14)
43. Meat and edible meat offal (excluding rabbits, hares, frogs' legs, primates, whales, dolphins and porpoises (mammals of the order Cetacea), manatees and dugongs (mammals of order Sirenia) and reptiles) fresh, chilled or frozen (HS 0208.90.00.28)
44. Meat and edible meat offal (excluding of rabbits, hares, frogs' legs, primates, whales, dolphins, porpoises, manatees, dugongs, reptiles of HS 0201 to HS 0207) fresh, chilled or frozen (HS 0208.90.00.90)
45. Pig fat free of lean meat and poultry fat (excluding rendered or otherwise extracted), fresh, chilled, frozen, salted, in brine, dried or smoked (HS 0209.00.00.15)

#### Fish products

46. Live trout (*Salmo trutta*, *Salmo gairdneri*, *Salmo clarki*, *Salmo aguabonita*, *Salmo gilae*) (HS 0301.91.00.03)

47. Live trout (*Salmo trutta*, *Oncorhynchus mykiss*, *Oncorhynchus clarki*, *Oncorhynchus aguabonita*, *Oncorhynchus gilae*, *Oncorhynchus apache* and *Oncorhynchus chrysogaster*) (HS 0301.91.00.28)
48. Live eels (*Anguilla* spp.) (HS 0301.92.00.04)
49. Live carp (HS 0301.93.00.05)
50. Live Bluefin tunas (*Thunnus thynnus*) (HS 0301.94.00.01)
51. Live southern bluefin tunas (*Thunnus maccoyii*) (HS 0301.95.00.02)
52. Live fish (excluding ornamental fish, trout, eels, carp) (HS 0301.99.00.06)
53. Live fish (excluding ornamental fish, trout, eels and carp) (HS 0301.99.00.29)
54. Live fish (excluding trout, eels, carp, bluefin tunas (*Thunnus thynnus*), southern bluefin tunas (*Thunnus maccoyii*) and ornamental fish) (HS 0301.99.00.35)
55. Trout, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.11.00.07)
56. Trout, fresh or chilled (*Salmo trutta*, *Oncorhynchus mykiss*, *Oncorhynchus clarki*, *Oncorhynchus aguabonita*, *Oncorhynchus gilae*, *Oncorhynchus apache* and *Oncorhynchus chrysogaster*), excluding fillets, livers, roes and other fish meat of (HS 0304.0302.11.00.30)
57. Pacific, Atlantic and Danube salmon, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.12.00.08)
58. Salmonidae, fresh or chilled (excluding trout and Pacific, Atlantic and Danube salmon; fish fillets and other fish meat of 0304, livers and roes) (HS 0302.19.00.09)
59. Salmonidae, fresh or chilled (excluding trout and Pacific, Atlantic and Danube salmon; fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.19.00.31)
60. Halibut (*Reinhardtius* spp.), fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.21.00.10)
61. Halibut (*Reinhardtius* spp.), fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.21.00.25)
62. Plaice, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.22.00.11)
63. Sole, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.23.00.12)
64. Flat fish, fresh or chilled (excluding halibut, plaice, sole, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.29.00.13)
65. Flat fish, fresh or chilled (excluding halibut, plaice, sole, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.29.00.26)
66. Albacore or longfinned tunas, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.31.00.14)
67. Yellowfin tunas, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.32.00.15)
68. Skipjack or stripe-bellied bonito, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.33.00.16)
69. Bigeye tunas (*Thunnus obesus*), fresh or chilled, (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.34.00.33)
70. Bluefin tunas (*Thunnus thynnus*), fresh or chilled, (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.35.00.35)

71. Southern bluefin tunas (*Thunnus maccoyii*), fresh or chilled, (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.36.00.37)
72. Tunas, fresh or chilled (excluding albacore, longfinned and yellowfin tunas, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.39.00.17)
73. Tunas, fresh or chilled, (excluding fish fillets or other fish meat of HS 0304, livers and roes, albacore or longfinned, yellowfin, skipjack or stripe-bellied bonito, bigeye, bluefin and southern bluefin tunas) (HS 0302.39.00.39)
74. Herrings, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.40.00.18)
75. Cod, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.50.00.19)
76. Sardines, sardinella, brisling or sprats, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.61.00.20)
77. Haddock, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.62.00.21)
78. Coalfish, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.63.00.22)
79. Mackerel, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.64.00.23)
80. Dogfish and other sharks, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.65.00.24)
81. Eels, fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.66.00.25)
82. Swordfish (*Xiphias gladius*) fresh or chilled (excluding fish fillets, other fish meat, livers and roes) (HS 0302.67.00.40)
83. Toothfish (*Dissostichus* spp.), fresh or chilled (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.68.00.41)
84. Fish, fresh or chilled (excluding salmonidae, flat fish, tunas, bonito, herrings, cod, sardines, haddock, coalfish, mackerel, dogfish and other sharks, eels, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.69.00.26)
85. Fish, fresh or chilled (excluding salmonidae, flat fish, tunas, bonito, herrings, cod, sardines, haddock, coalfish, mackerel, dogfish and other sharks, eels, swordfish, toothfish, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0302.69.00.42)
86. Fish livers and roes, fresh or chilled (HS 0302.70.00.27)
87. Pacific salmon, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.10.00.01)
88. Sockeye salmon (red salmon - *Oncorhynchus nerka*), frozen (excluding fish fillets or other fish meat of HS 0304, livers and roes) (HS 0303.11.00.40)
89. Pacific salmon (*Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* & *Oncorhynchus rhodurus*), frozen (excluding Sockeye (red) salmon, fish fillets or meat of HS 0304 & livers & roes) (HS 0303.19.00.45)
90. Trout, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.21.00.02)

91. Trout, frozen (*Salmo trutta*, *Oncorhynchus mykiss*, *Oncorhynchus clarki*, *Oncorhynchus aguabonita*, *Oncorhynchus gilae*, *Oncorhynchus apache* and *Oncorhynchus chrysogaster*), excluding fillets, livers, roes and other fish meat of HS 0304 (HS 0303.21.00.25)
92. Atlantic and Danube salmon, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.22.00.03)
93. Salmonidae, frozen (excluding Pacific, Atlantic and Danube salmon, trout, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.29.00.04)
94. Salmonidae, frozen (excluding Pacific, Atlantic and Danube salmon, trout, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.29.00.26)
95. Halibut, frozen (excluding fish fillets and other fish meat of (HS 0304, livers and roes) (HS 0303.31.00.05)
96. Plaice, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.32.00.06)
97. Sole, frozen (excluding fish fillets and other fish meat of (HS 0304, livers and roes) (HS 0303.33.00.07)
98. Flat fish, frozen (excluding halibut, plaice, sole, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.39.00.08)
99. Albacore or longfinned tunas, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.41.00.09)
100. Yellowfin tunas, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.42.00.10)
101. Skipjack or stripe-bellied bonito, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.43.00.11)
102. Bigeye tunas (*Thunnus obesus*), frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.44.00.50)
103. Bluefin tunas (*Thunnus thynnus*), frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.45.00.53)
104. Southern bluefin tunas (*Thunnus maccoyii*), frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.46.00.55)
105. Tunas, frozen (excluding albacore, longfinned and yellowfin tuna, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.49.00.12)
106. Tunas (excluding albacore or longfinned, yellowfin, skipjack or stripe bellied bonito, bigeye, bluefin, southern bluefin, fish fillets and other fish meat of HS 0304, livers and roes), frozen (HS 0303.49.00.59)
107. Herrings, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.50.00.13)
108. Herrings (*Clupea harengus*, *Clupea pallasii*) frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.51.00.51)
109. Cod (*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*) frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.52.00.52)
110. Cod, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.60.00.14)
111. Swordfish (*Xiphias gladius*), frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.61.00.53)

112. Toothfish (*Dissostichus* spp), frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.62.00.54)
113. Sardines, sardinella, brisling or sprats, frozen (excluding fish fillets and other fish meat of HS 0304, liver and roes) (HS 0303.71.00.15)
114. Haddock, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.72.00.16)
115. Coalfish, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.73.00.17)
116. Mackerel, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.74.00.18)
117. Dogfish and other sharks, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.75.00.19)
118. Eels, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.76.00.20)
119. Sea bass, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.77.00.21)
120. Hake, frozen (excluding fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.78.00.22)
121. Toothfish (*Dissostichus* spp.), frozen (excluding fish fillets, other fish meat, livers and roes) (HS 0303.79.00.01)
122. Fish, frozen (excluding salmonidae, flat fish, tunas, bonito, herrings, cod, sardines, haddock, coalfish, mackerel, dogfish and other sharks, eels, sea bass, hake, toothfish, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.79.00.02)
123. Fish, frozen (excluding salmonidae, flat fish, tunas, bonito, herrings, cod, sardines, haddock, coalfish, mackerel, dogfish and other sharks, eels, sea bass, hake, fish fillets and other fish meat of HS 0304, livers and roes) (HS 0303.79.00.23)
124. Fish, frozen (excluding pacific salmon, salmonidae, flat fish, tunas, herrings, cod, swordfish, toothfish, sardines, haddock, coalfish, mackerel, dogfish & other sharks, eels, sea bass, hake, fish fillets & other fish meat of HS 0304, livers & roes) (HS 0303.79.00.55)
125. Fish livers and roes, frozen (HS 0303.80.00.24)
126. Trout fillets and other fish meat, fresh or chilled (HS 0304.10.00.01)
127. Fish fillets and other fish meat, fresh or chilled (excluding trout) (HS 0304.10.00.02)
128. Trout fillets, fresh or chilled (HS 0304.10.00.35)
129. Fish fillets and other fish meat, fresh or chilled (excluding trout) (HS 0304.10.00.36)
130. Fresh or chilled fish fillets and other fish meat (HS 0304.10.00.42)
131. Swordfish (*Xiphias gladius*), fresh or chilled whether or not minced (excluding that of HS 0302) (HS 0304.11.00.56)
132. Toothfish (*Dissostichus* spp.), fresh or chilled whether or not minced (excluding that of HS 0302) (HS 0304.12.00.57)
133. Fish fillets and other fish meat (whether or not minced) fresh or chilled (excluding swordfish, toothfish and that of HS 0302) (HS 0304.19.00.58)
134. Frozen trout fillets (HS 0304.20.00.03)
135. Frozen hake fillets, in blocks not excluding 1 kg (HS 0304.20.00.04)
136. Frozen hake fillets, in blocks excluding 1 kg (HS 0304.20.00.05)

137. Frozen fish fillets, in packs not excluding 1 k g (excluding trout and hake) (HS 0304.20.00.06)
138. Frozen fish fillets, in packs excluding 1 kg (e xcl. trout and hake) (HS 0304.20.00.07)
139. Frozen toothfish (*Dissostichus* spp.) fillets (HS 0304.20.00.20)
140. Frozen fish fillets (excluding hake and toothfish) in packs not exceeding 1 kg (HS 0304.20.00.21)
141. Frozen fish fillets (excluding hake and toothfish) in packs exceeding 1 kg (HS 0304.20.00.22)
142. Frozen hake (*Merluccius* spp., *Urophycis* spp.) fillets in packs not exceeding 1 kg (HS 0304.20.00.31)
143. Frozen hake (*Merluccius* spp., *Urophycis* spp.) fillets in packs exceeding 1 kg (HS 0304.20.00.32)
144. Frozen hake (*Merluccius* spp., *Urophycis* spp.) fillets in processing blocks (HS 0304.20.00.33)
145. Frozen trout fillets (HS 0304.20.00.37)
146. Frozen fish fillets, in packs not exceeding 1 kg (excluding trout and hake) (HS 0304.20.00.38)
147. Frozen fish fillets, in packs exceeding 1 kg (excluding trout and hake) (HS 0304.20.00.39)
148. Frozen hake fillets in packs (HS 0304.20.00.43)
149. Frozen fish fillets (excluding hake) in packs not exceeding 1 kg (HS 0304.20.00.44)
150. Frozen fish fillets (excluding hake) in packs exceeding 1 kg (HS 0304.20.00.45)
151. Swordfish (*Xiphias gladius*) frozen fish fillets (HS 0304.21.00.60)
152. Toothfish (*Dissostichus* spp) frozen fish fillets (HS 0304.22.00.61)
153. Frozen hake fillets in packs (HS 0304.29.00.62)
154. Frozen hake (*Merluccius* spp., *Urophycis* spp.) fillets in processing blocks (HS 0304.29.00.63)
155. Frozen fish fillets (excluding hake, swordfish and toothfish) in packs not exceeding 1 kg (HS 0304.29.00.91)
156. Frozen fish fillets (excluding hake, swordfish and toothfish) in packs exceeding 1 kg (HS 0304.29.00.92)
157. Frozen trout (excluding fillets) (HS 0304.90.00.08)
158. Frozen hake mince blocks (HS 0304.90.00.09)
159. Frozen hake meat (excluding mince) (HS 0304.90.00.10)
160. Frozen fish meat (excluding trout and hake) (HS 0304.90.00.11)
161. Frozen hake (*Merluccius* spp., *Urophycis* spp.) mince processing blocks (excluding fillets) (HS 0304.90.00.34)
162. Frozen trout (excluding fillets) (HS 0304.90.00.40)
163. Frozen fish meat (excluding trout and hake) (HS 0304.90.00.41)
164. Frozen fish (excluding fillets and hake in mince processing block) (HS 0304.90.00.42)
165. Swordfish fillets whether or not minced (excluding fresh, chilled or frozen) (HS 0304.91.00.69)
166. Toothfish (*Dissostichus* spp) whether or not minced (excluding fresh, chilled or frozen) (HS 0304.92.00.70)
167. Frozen hake (*Merluccius* spp., *Urophycis* spp.) mince processing blocks (excluding fillets) (HS 0304.99.00.71)

168. Frozen fish (excluding fillets and hake in mince processing block) (HS 0304.99.00.72)

#### Crustacean products

169. Rock lobster and other sea crawfish, frozen; rock lobster and other sea crawfish, in shell, cooked by steaming or boiling in water, frozen (HS 0306.11.00.01)
170. Lobsters (*Homarus* spp.), frozen; lobsters (*Homarus* spp.), in shell, cooked by steaming or boiling in water, frozen (HS 0306.12.00.02)
171. Frozen shrimps and prawns (uncooked), whether in shell or not; Frozen shrimps and prawns, in shell, cooked by steaming or by boiling in water (HS 0306.13.00.03)
172. Frozen shrimps and prawns, head on and tail on, whether in shell or not, cooked by steaming or by boiling in water (HS 0306.13.00.40)
173. Frozen shrimps and prawns, head on and tail on, uncooked, farmed, whether in shell or not (HS 0306.13.00.41)
174. Frozen shrimps and prawns, head on and tail on, uncooked, not farmed, whether in shell or not (HS 0306.13.00.42)
175. Crabs, frozen; crabs, in shell, cooked by steaming or boiling in water, frozen (HS 0306.14.00.04)
176. Crustaceans (excluding rock lobster and other sea crawfish, lobsters (*Homarus* spp.), shrimps, prawns, crabs), frozen (HS 0306.19.00.05)
177. Crustaceans and flours, meals and pellets of crustaceans (excluding rock lobsters and other sea crawfish, lobsters (*Homarus* spp.), shrimps, prawns and crabs) frozen, fit for human consumption (HS 0306.19.00.26)
178. Frozen freshwater crayfish, whether in shell or not, cooked by steaming or by boiling in water (HS 0306.19.00.50)
179. Frozen freshwater crayfish, uncooked, whether in shell or not (HS 0306.19.00.51)
180. Crustaceans and flours, meals and pellets of crustaceans (excluding rock lobsters, freshwater crayfish and other sea crawfish), in shell, cooked by steaming or boiling in water, chilled, dried, salted or in brine (HS 0306.19.00.52)
181. Rock lobster and other sea crawfish, live, fresh, chilled, dried, salted or in brine; rock lobster and other sea crawfish, in shell, cooked by steaming or boiling in water, chilled, dried, salted or in brine (HS 0306.21.00.06)
182. Lobsters (*Homarus* spp.), in shell, boiled in water (HS 0306.22.00.07)
183. Lobsters (*Homarus* spp.), live, fresh, chilled, dried, salted or in brine; lobsters (*Homarus* spp.), in shell, cooked by steaming, chilled, dried, salted or in brine (HS 0306.22.00.08)
184. Lobsters, not frozen (HS 0306.22.00.33)
185. Shrimps and prawns, fresh or chilled, whether in shell or not (HS 0306.23.00.09)
186. Shrimps and prawns, whether in shell or not, live, dried, salted or in brine; shrimps and prawns in shell, cooked by steaming or boiling in water, dried, salted or in brine (HS 0306.23.00.10)
187. Shrimps and prawns, head on and tail on, whether in shell or not, not frozen, cooked by steaming or by boiling in water (HS 0306.23.00.60)
188. Shrimps and prawns, head on and tail on, uncooked, farmed, not frozen, whether in shell or not (HS 0306.23.00.61)
189. Shrimps and prawns, head on and tail on, uncooked, not farmed, not frozen, whether in shell or not (HS 0306.23.00.62)



190. Crabs, live, fresh, chilled, dried, salted or in brine; crabs, in shell, cooked by steaming or boiling in water, chilled, dried, salted or in brine (HS 0306.24.00.11)
191. Crustaceans (excluding rock lobsters and other sea crawfish, lobsters, shrimps, prawns and crabs), not frozen (HS 0306.29.00.12)
192. Freshwater crayfish, whether in shell or not, not frozen, cooked by steaming or by boiling in water (HS 0306.29.00.70)
193. Freshwater crayfish, uncooked, not frozen, whether in shell or not (HS 0306.29.00.71)

#### Mollusc products

194. Oysters, live, fresh, chilled, frozen, dried, salted or in brine (HS 0307.10.00.13)
195. Scallops (including queen scallops, of the genera Pecten, Chlamys or Placopecten), live, fresh, or chilled (HS 0307.21.00.14)
196. Scallops (including queen scallops, of the genera Pecten, Chlamys or Placopecten), frozen, dried, salted or in brine (HS 0307.29.00.15)
197. Mussels, live, fresh or chilled (HS 0307.31.00.16)
198. Mussels, frozen, dried, salted or in brine (HS 0307.39.00.17)
199. Cuttle fish and squid, live, fresh or chilled (HS 0307.41.00.18)
200. Cuttle fish, frozen, dried, salted or in brine (HS 0307.49.00.19)
201. Squid, frozen, dried, salted or in brine (HS 0307.49.00.20)
202. Octopus, live, fresh or chilled (HS 0307.51.00.21)
203. Octopus, frozen, dried, salted or in brine (HS 0307.59.00.22)
204. Snails (excluding sea snails), live, fresh, chilled, frozen, dried, salted or in brine (HS 0307.60.00.23)
205. Molluscs (excluding oysters, scallops, mussels, cuttlefish, squid, octopus, snails other than sea snails) and other aquatic invertebrates (excluding crustaceans), live, fresh or chilled (HS 0307.91.00.24)
206. Abalone, live, fresh or chilled (HS 0307.91.00.29)
207. Molluscs and other aquatic invertebrates (excluding oysters, scallops, mussels, cuttlefish, squid, octopus, snails other than sea snails, crustaceans and abalone): live, fresh or chilled (HS 0307.91.00.30)
208. Molluscs and other aquatic invertebrates, (excluding oysters, scallops, mussels, cuttlefish, squid, octopus, snails other than sea snails, and crustaceans) live, fresh, or chilled (HS 0307.91.00.35)
209. Molluscs (excluding oysters, scallops, mussels, cuttlefish, squid, octopus, snails other than sea snails) and other aquatic invertebrates (excluding crustaceans), frozen, dried, salted or in brine (HS 0307.99.00.25)
210. Molluscs and other aquatic invertebrates (excluding crustaceans, oysters, scallops, mussels, cuttlefish, squid, octopus and snails (excluding sea snails)) (including flours, meals and pellets) frozen, dried, salted or in brine, fit for human consumption (HS 0307.99.00.28)
211. Abalone, frozen, dried, salted or in brine (including flours, meals and pellets) fit for human consumption (HS 0307.99.00.31)
212. Molluscs & other aquatic invertebrates (excluding crustaceans, oysters, scallops, mussels, cuttlefish, squid, octopus, snails other than sea snails, & abalone): frozen, dried, salted/in brine, in flours, meals or pellets, fit for human consumption (HS 0307.99.00.32)