

A\$34 billion reasons to access the US seafood market

**A guide to exporting Australia's fisheries
products to the United States**

Jim Fitzgerald



Department of
**AGRICULTURE
FISHERIES
FORESTRY
AUSTRALIA**



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Department of Agriculture Fisheries and Forestry – Australia

November 2002



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**AGRICULTURE
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FORESTRY** -
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A guide to exporting Australia's fisheries products to the United States**

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FOREWORD



During the past decade the Australian fisheries sector has performed impressively. It has increased both the volume and the quality of exported products, and its ability to take advantage of new market opportunities. The industry has shown a willingness to innovate and embrace technological change and has remained flexible in adjusting to changing market requirements.

During the same period, the United States (US) market for imported fisheries products has doubled in value, while growth in other traditional world markets has stalled or gone into gradual decline. In total, the US imported more than A\$34 billion worth of edible and non-edible fisheries products in 2001 and now ranks as the third largest market destination for Australia.

There is further potential to expand Australian fisheries exports into the US, which in turn will secure a more diversified market base for our fisheries products. Developing and maintaining a diversified market base is an extremely important objective in order to minimise the problems associated with having too few markets that are economically and geographically co-located.

It is intended that this guide will provide small to medium sized seafood producers, or producers with a non-diversified export base, with basic market information on alternative export opportunities. This is the first of several fisheries export market guides that will be produced by the Department of Agriculture, Fisheries and Forestry – Australia, in association with the Australian Seafood Industry Council. Successive publications will explore opportunities in the European Union, Middle East and Indian markets.

It is hoped that these guides will also support and promote the development of an industry-driven market access strategy for the Australian fisheries industry, which will be important in assisting the fishing and aquaculture industries address issues that may affect their future profitability.

I would like to congratulate the Australian fishing and aquaculture industries on their outstanding export performance and acknowledge the important contribution that they make to regional and national prosperity.

A handwritten signature in black ink that reads "Ian Macdonald".

Senator the Hon. Ian Macdonald
Minister for Forestry and Conservation
Minister Responsible for Commonwealth Fisheries and Aquaculture

EXECUTIVE SUMMARY

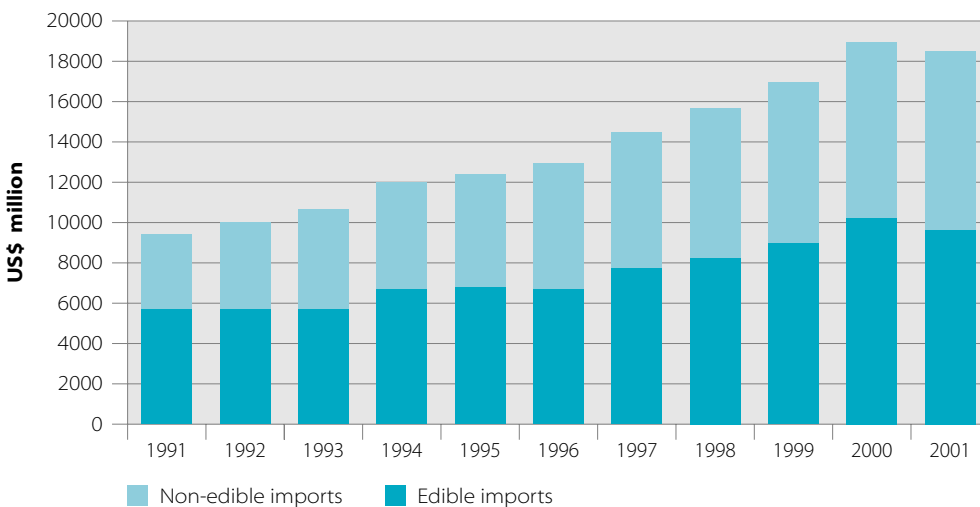
It is no coincidence that the development of the Australian seafood industry has coincided with a period of strong world economic growth and strong economic performance of its key export markets. With the Australian seafood industry's reliance upon exporting product and the importance of four key Asian markets, Japan, Hong Kong, Chinese Taipei and Singapore (as well as the United States), the industry's performance is largely dictated by the economic fortunes of those key economies. This reliance upon relatively few markets makes the Australian industry extremely susceptible to economic fluctuation. The extent of exposure may well be exacerbated by the high-end, high-value nature of our major fisheries exports.

With world growth rates slowing and a perceived brittleness in key Asian economies, particularly Japan, the need to diversify markets for Australian fisheries exports is gaining prominence. The expanding US market offers great opportunity for exporters to diversify their risk more evenly across world markets.

In 2001, the value of edible seafood imports to the US was more than US\$9.8 billion¹. Non-edible imports also approached record highs totalling US\$8.7 billion, having more than doubled in value during the past decade (see Figure 1)². The US ranked second worldwide behind Japan (US\$15.5 billion³), in terms of value of edible seafood imports. In the past five years the value of the US edible seafood market has increased at an annual rate of 7.6 per cent, which contrasts with a reduction in the value of imports by Japan of around 9 per cent over the same period⁴. If this trend continues, the US will become the world's primary destination for edible seafood exports within the next decade.

In 2001, the value of edible seafood imports to the US was more than US\$9.8 billion. Non-edible imports also approached record highs totalling US\$8.7 billion...

Figure 1: United States fisheries imports 1991–2001



1. US Department of Commerce, Bureau of Census.
2. Note: nominal \$ values.
3. 2000 FAO data.
4. *Fisheries of the United States, 2001.*

Australian seafood exports to the US

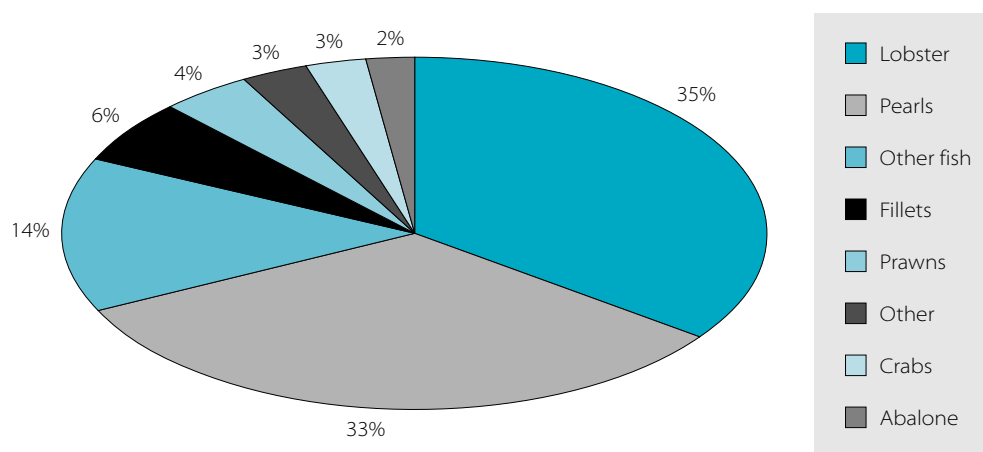
During the past decade, the Australian seafood industry has benefited from a period of sustained growth. Since 1995/96, the value of total Australian fisheries production (including non-edible production) has increased by 46 per cent (A\$789 million) to A\$2.47 billion in 2000/01. Growth in the industry has been fuelled by: developments in the production and marketing of five key species; favourable economic conditions in major export markets; growth in aquaculture production; and the significant devaluation of the Australian dollar against all major currencies, making our exports more attractive.

Since 1995/96 Australian exports of seafood products to the US have risen by 201 per cent in value. This ranks the US market as Australia's third most important seafood destination behind Japan (A\$744 million) and Hong Kong (A\$494 million), with Chinese Taipei (A\$180 million)⁵ making up the other significant market. However, despite significant gains the US market only accounts for around 8 per cent of our total seafood exports.

In 2000/01 Australian seafood exports to the US totalled A\$192 million. This included A\$64 million of non-edible product, more than 90 per cent of which are pearl exports. The value of edible Australian seafood exports to the US declined by 10 per cent in 2000/01. Much of this decline can be attributed to a reduction in rock lobster sales of A\$19 million and a reduction in fish fillet sales of A\$13 million.

Australia's major seafood exports to the US in 2000/01 included: rock lobster A\$67.6 million; pearls A\$64 million; fish (other than fillets or canned) A\$26 million; fish fillets A\$11.3 million; prawns A\$7 million; crabs A\$5 million; abalone A\$4.7 million; and other A\$5.8 million (see Figure 2)⁶.

Figure 2: Australian edible and non-edible seafood exports to the US 2000/01 (A\$192 million)



In 2000/01
Australian
seafood exports
to the US totalled
A\$192 million.

... since 1995/96
Australian exports
of seafood
products to
the US have risen
by 201 per cent
in value.

5. 2000/01 figures, *Australian Seafood Statistics 2001*.

6. Note: nominal \$ values.

A guide to accessing the US seafood market

To export live or processed seafood products from Australia, the exporter is required to meet Australian regulations on health safety and customs, as well as any requirements of the importing country, in this case the US. Australia's principal agencies involved in providing certification and clearance services are the Australian Quarantine and Inspection Service (AQIS) and the Australian Customs Service.

AQIS has a dual role of providing consumer protection and facilitating trade by providing a reliable, scientifically based and cost-effective quarantine and inspection service. Without this service, market access for Australian food exports to many countries would be compromised. The Australian Customs Service regulations require that all export goods requiring an AQIS permit (i.e. all seafood exports) be cleared through customs in order to leave the country. This process requires the filing of export documentation with Customs and is explained later in this guide.

To export processed foods from Australia the exporter must meet the requirements of the *Export Control (Processed Food) Orders* and in addition provide documentation to Customs before disembarkation. These regulations set out minimum standards for exporting seafood, as well as other processed goods. To comply with the regulations a seafood exporter must:

1. Register their export establishment;
2. Ensure that the establishment complies with an approved system of inspection; and
3. Gain an export permit for Australian customs clearance.

In addition, to export to the US, producers must meet the requirements of the US Government, which include:

4. Gaining US import certification and complying with US Customs, and US Food and Drug Administration (FDA) procedural requirements;
5. Complying with tariff provisions; and
6. Complying with exceptional and restricted import regulations.

To export live or processed seafood products from Australia, the exporter is required to meet Australian regulations on health safety and customs, as well as any requirements of the importing country.

Government assistance for current or potential exporters

A number of programs and appropriate contact points are available to seafood exporters, or potential exporters, to assist in complying with Australian export and US import regulations. These programs are provided by Commonwealth, State and Territory Governments and are located across a number of portfolio departments. This 'guide' provides a list of Commonwealth programs and gives appropriate points of contact for the Commonwealth, State and Territory Governments (see Chapter 4).

In addition, a list of US and Australian industry contacts is included as are a number of essential sources of market information, many of which are available on the Internet (see Chapter 3).

CHAPTER 1

US seafood industry and trade with Australia

The US market for imported seafood

In 2001, the value of edible seafood imports to the US exceeded US\$9.8 billion⁷, a decrease of US\$189 million over 2000. Non-edible imports approached record highs during 2001 (US\$8.7 billion) and have more than doubled in value during the past decade. The US ranks second worldwide, in terms of value of edible seafood imports, behind Japan (US\$15.5 billion⁸).

The US offers a sophisticated seafood market characterised by:

- a rapidly growing import trade;
- a buoyant economy and high living standards (despite slowing economic activity);
- a strong currency (relative to the Australian dollar);
- a well developed transport and logistics network;
- low tariff barriers (for a majority of seafood products);
- low non-tariff barriers (for a majority of seafood products);
- a relatively stable quarantine and bureaucratic establishment;
- well developed markets offering top dollar for quality product;
- limited language difficulties with English the preferred business language; and
- a strong and reliable banking and financial sector.

The US has 41 customs districts through which edible seafood products are imported. Of these, 12 customs districts account for around 90 per cent of seafood imports. The most important import markets in 2000 were: Los Angeles US\$2.93 billion, Portland US\$1.3 billion, New York US\$1.23 billion, Miami US\$1.2 billion, Boston US\$642 million and Seattle US\$596 million. Additional market information is available at: <http://www.st.nmfs.gov/st1/trade/index.html>

Major sources of US fishery imports in 2001 included: Canada US\$2.8 billion, Thailand US\$2.2 billion, Italy US\$1.4 billion and China US\$1.2 billion. Australia ranked 20th in terms of value of US fisheries imports⁹, or less than 1 per cent of the total.

The US ranks second worldwide, in terms of value of edible seafood imports, behind Japan.

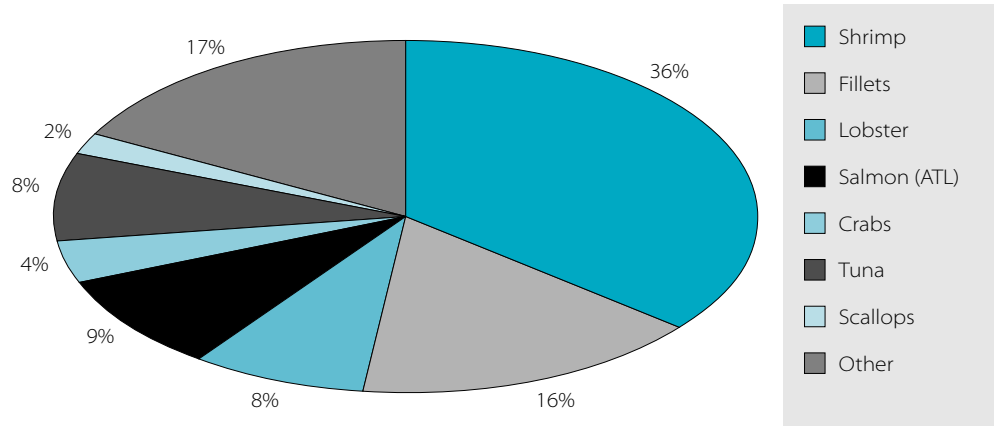
7. US Department of Commerce, Bureau of Census.

8. 2000 figures, note: nominal \$ values.

9. Disaggregated data unavailable.

The US edible imported seafood market is dominated by shrimp, which made up US\$3.6 billion or 36 per cent of the market in 2001. Other significant market segments were fish fillets and steaks US\$1.6 billion, lobster US\$827 million, salmon US\$855 million, crabs US\$368 million and tuna US\$829 million (see Figure 3).

Figure 3: Composition of edible US seafood imports 2000 (US\$10.1 billion)



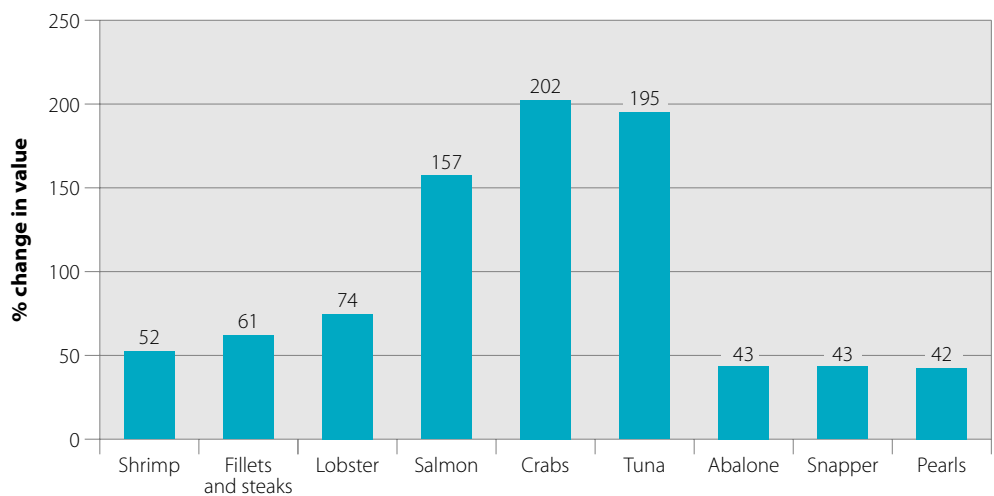
In the past five years the US edible seafood imports have increased in value by US\$2.7 billion or around 40 per cent.

Trends in US seafood imports 1996–2001

In the past five years the US edible seafood imports have increased in value by US\$2.7 billion or around 40 per cent. This compares with a 9 per cent reduction in the value of imports by Japan over the same period¹⁰. If this trend continues, the US will become the world’s primary destination for seafood exports within the next decade.

In terms of gross value, shrimp (+ US\$1.17 billion), fillets and steaks (+ US\$690 million), crab (+ US\$269 million), salmon (+ US\$448 million) and lobster (+ US\$322 million) have contributed the greatest gains since 1996. However, other segments of the market have also performed strongly in percentage terms (see Figure 4)¹¹.

Figure 4: Percentage change in the value of selected US seafood imports, from 1996–2001



10. Fisheries of the United States, 2001.

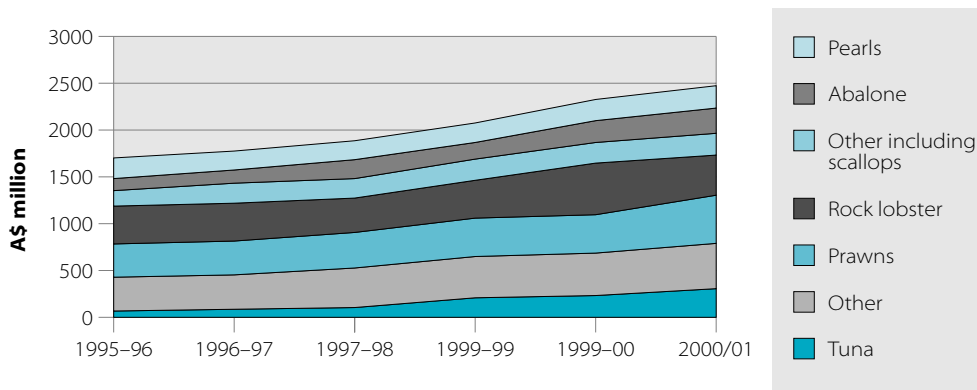
11. Note: nominal \$ values.

Australian fisheries production

During the past five years Australia's fishing industry has increased the value of fisheries production from A\$1.77 billion to A\$2.48 billion, an increase of 40 per cent. The value of 'wild caught' fisheries still dominates the Australian fishing industry, making up around A\$1.73 billion or 70 per cent of total fisheries production. Aquaculture production contributed A\$771 million¹².

However, since 1995/96 the value of aquaculture production has risen by 101 per cent or A\$388 million, while the value of 'wild caught' fisheries has risen by 32 per cent or A\$423 million. The dramatic rise in value of aquaculture in percentage terms indicates a longer-term trend, which suggests the sector will provide the major impetus for medium to long-term growth in the value of Australia's fisheries production (see Figure 5)¹³.

Figure 5: Gross value of fisheries production



Exports account for 85 per cent of the value of Australian fisheries production and have risen by 60 per cent to A\$2.2 billion since 1995/96.

Trade in Australian fisheries products

Exports

In terms of export earnings, the fisheries sector contributed 3 per cent to total Australian exports in 2000/01.

Exports account for 85 per cent of the value of our fisheries production and have risen by 60 per cent to A\$2.2 billion since 1995/96. Fisheries exports are dominated by five key products, rock lobster (A\$532 million), pearls (A\$419 million), prawns (A\$291 million), tuna (A\$331 million) and abalone (A\$249 million), which combined make up A\$1.82 billion or 85 per cent of total fisheries exports.

12. Provisional estimates for 2000/01.

13. Note: nominal \$ values.

Since the beginning of the 1990s there has been a gradual diversification in the destinations of Australian fisheries exports. In 1990–91, just over half of the exports of fisheries products went to Japan. During the 1990s, China, Chinese Taipei, Hong Kong and the United States became more important destinations for Australian product. Since 1995/96 Japan has retained its dominance as the principal market (see Table 1)¹⁴. Three significant changes during this period have included:

- firstly, the fall in share of the Chinese Taipei market as a result of high levels of domestic protection, a lower than average appreciation of the Chinese Taipei Yuan against the Australian dollar, and a preference for Hong Kong as the gateway for seafood into China;
- secondly, the increase in importance of the US market, as a result of the strength of the US dollar and an increase in the consumption of high-value seafood, such as rock lobster and high-end fish species; and
- finally, the emergence of Hong Kong as a second principal destination for Australian fisheries exports and major gateway into China.

Table 1: Change in export market share — Australian fisheries exports (A\$ '000)

| | 1995/96 | % of total | 2000/01 | % of total |
|----------------|-----------|------------|-----------|------------|
| Japan | 490,927 | 37 | 745,094 | 35 |
| Hong Kong | 234,202 | 18 | 495,761 | 23 |
| Chinese Taipei | 219,135 | 17 | 180,014 | 8 |
| United States | 63,856 | 5 | 192,244 | 9 |
| Singapore | 45,702 | 3 | 60,784 | 3 |
| China | 20,991 | 2 | 50,890 | 2 |
| Other | 237,530 | 18 | 401,959 | 19 |
| Total | 1,312,343 | 100 | 2,126,746 | 100 |

Australian fisheries exports to the US

In 2000/01 Australian edible fisheries exports to the US totalled A\$128 million and inedible exports A\$64 million. The value of Australian seafood exports to the US declined by 10 per cent in 2000/01. Much of this decline can be attributed to a fall in rock lobster sales of A\$19 million and a reduction in fish fillet sales of A\$13 million.

In 2000/01
Australian edible
fisheries exports
to the US totalled
A\$128 million and
inedible exports
A\$64 million.

14. Note: nominal \$ values.

Despite this fluctuation, since 1995/96 Australian fisheries exports to the US have risen by 201 per cent in value. This ranks the US market as our third most important export destination behind Japan (A\$745 million), Hong Kong (A\$495 million), with the other significant market Chinese Taipei (A\$180 million)¹⁵.

Australia's major fisheries exports to the US in 2000/01 were:

- Rock lobster — A\$67.6 million;
- Pearls (including other non-edible) — A\$64 million;
- Fish (other than fillets or canned) — A\$26 million;
- Fish fillets — A\$11.3 million;
- Prawns — A\$7 million;
- Crabs — A\$5 million;
- Abalone — A\$4.7 million; and
- Other — A\$5.8 million.

Major US seafood export destinations

Australian product is exported throughout the US and understandably, for logistical reasons, our major markets are situated on the west coast. In 2000 Australia exported more than US\$67 million through Los Angeles, which as described earlier is the principal US seafood market. US seafood market information is available at: http://www.st.nmfs.gov/st1/trade/trade_dstrct_allprdcts_mth.html

Trends in Australian fisheries exports to the US 1995–2001

As mentioned earlier, from 1995/96 to 2000/01 Australian fisheries exports to the US rose by 201 per cent to A\$192 million. In percentage terms, this makes the US seafood market Australia's most rapidly growing, significant seafood export destination over this period.

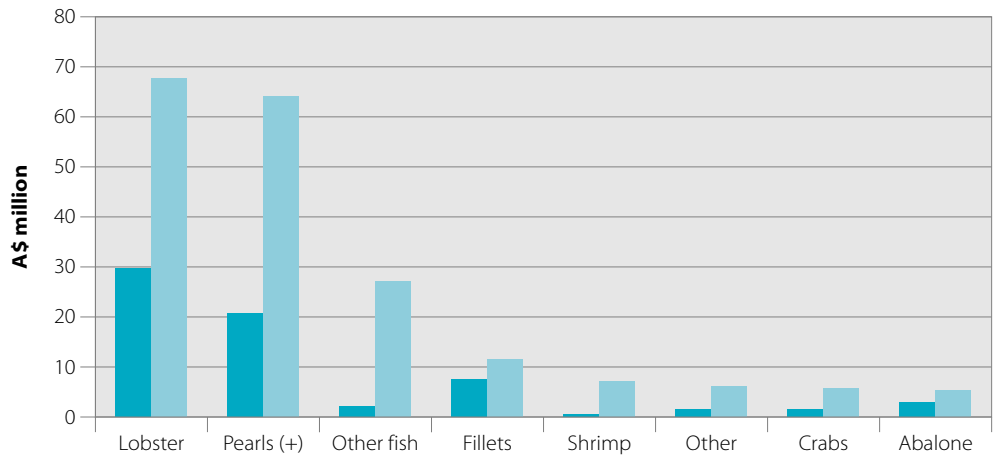
Lobster exports to the US (predominantly tails) have more than doubled in value since 1995/96 to A\$67 million, and along with pearls and other non-edible fisheries products, which have risen by 215 per cent to A\$64 million, dominate Australia's seafood exports to the US making up 69 per cent of the total amount. Impressive gains have also been made in the export of 'other fish', which has risen in value by A\$26.3 million or a massive 1559 per cent since 1995/96. ('Other fish' exports are dominated by orange roughy and swordfish.)

In percentage terms, this makes the US seafood market Australia's most rapidly growing, significant seafood export destination over this period.

15. 2000/01 figures, *Australian Seafood Statistics 2001*.

Fish fillets, shrimp (prawns), 'other', crabs and abalone have also experienced significant gains during the period, and account for 17 per cent of the total (see Figure 6)¹⁶.

Figure 6: Comparison of Australian seafood exports to the US 1995/96 to 2000/01

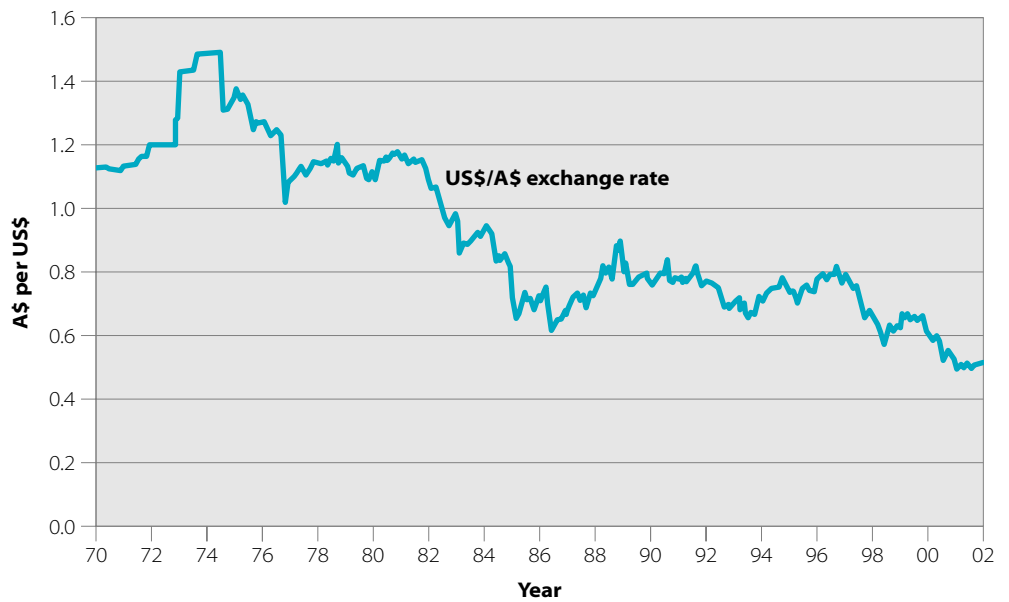


Currency fluctuations

The Australian seafood industry, like all Australian exporters, has benefited handsomely from favourable exchange rates with the US (as well as other leading currencies). From 1995 to 2001 the Australian dollar has depreciated by 32 per cent against the US dollar (see Figure 7).

The relative strength of the US dollar gives our exporters the opportunity to capitalise on the lower relative cost of producing seafood compared with many of our international competitors, especially those with stronger national currencies.

Figure 7: US dollar/Australian dollar exchange rate 1970–2002



16. Note: nominal \$ values.

CHAPTER 2

Doing business with the United States

To export live or processed seafood products from Australia, the exporter is required to meet Australian regulations on health safety and customs, as well as any requirements of the importing country, in this case the United States. Australia's principal agencies involved in providing certification and clearance services are the Australian Quarantine and Inspection Service (AQIS) and the Australian Customs Service.

AQIS has a dual role of providing consumer protection and facilitating trade by providing a reliable, scientifically based and cost-effective quarantine and inspection service. Without this service, market access for Australian food exports to many countries would be compromised (<http://www.aqis.gov.au>).

Australian Customs Service regulations require all export goods needing an AQIS permit (i.e. all seafood exports) to be cleared through customs in order to leave the country. This process requires the filing of export documentation with Customs and is explained later in this guide (<http://www.customs.gov.au>).

Australian export requirements are developed in close consultation with industry partners to ensure the entire Australian seafood industry is protected by an appropriate level of regulation. Seafood industry representatives meet regularly with government through the Seafood Export Consultative Committee to discuss issues relating to the exportation of seafood products (<http://www.seafood.truenorth.net.au>).

To export processed foods from Australia the exporter must meet the requirements of the *Export Control (Processed Food) Orders* and, in addition, provide documentation to Customs before disembarkation. These regulations set out minimum standards for exporting seafood, as well as other processed goods.

Australia's principal agencies involved in providing certification and clearance services are the Australian Quarantine and Inspection Service (AQIS) and the Australian Customs Service.

To comply with the regulations a seafood exporter must:

Australian requirements

1. Register their export establishment;
2. Ensure that the establishment complies with an approved system of inspection; and
3. Gain an export permit for Australian customs clearance.

In addition, to export to the US, producers must meet the requirements of the US Government, including:

US requirements

4. Gaining US import certification and complying with US Customs, and US FDA procedural requirements;
5. Complying with tariff provisions; and
6. Complying with exceptional and restricted import regulations.

Australian export requirements for seafood

a. Registering an export establishment

- All seafood must be produced, processed and stored in an establishment registered for export by AQIS;
- Fishing vessels which freeze, pack or process seafood in any way must be registered for export with AQIS;
- Some fishing vessels, which catch only, are not required to be registered with AQIS;
- All land-based processing and storage establishments must be registered for export with AQIS.

For an establishment to meet the requirements of the Export Control (Processed Food) Orders, it must achieve minimum standards of construction and hygiene. To obtain registration of premises, intending exporters should contact the nearest AQIS regional office (see Contacts section) to discuss the company's proposed registration.

AQIS will examine the application and inspect the premises. Export operations cannot begin until the exporter receives notification of approval from AQIS and the overseas country government authorities (where required). The occupier is provided with a registration certificate and number that must be displayed at the establishment.

Each registered establishment is reviewed on an annual basis.

For an establishment to meet the requirements of the Export Control (Processed Food) Orders it must achieve minimum standards of construction and hygiene. To obtain registration of premises, intending exporters should contact the nearest AQIS regional office.

b. Ensure the establishment complies with an approved system of inspection

A requirement of registering an export establishment is the approval by AQIS of an inspection system that meets the requirements of the potential export market.

The Inspection Service ensures export foods are safe, wholesome and accurately described thereby protecting Australia's trading reputation. Inspection also ensures that overseas market requirements and international obligations, treaties and conditions are met. Most prescribed goods cannot be exported without some form of inspection by AQIS, which offers exporters inspection programs to satisfy different market and export requirements.

AQIS uses Quality Assurance (QA)-based systems. There are two QA-based systems used for seafood exports: the FPA (Food Processing Accreditation) and AQA (Approved Quality Assurance). FPA is a risk and performance-based Hazard Analysis and Critical Control Points (HACCP) and Good Management Practice (GMP) program. AQA is a fully documented system, International Standards Organisation (ISO)-based with an HACCP required program. The process/exporter can choose which program they want to use. Each is inspected differently by AQIS. Under the FPA program, the firm is inspected based on product and processing risk. Under the AQA program, the firm is inspected at least once yearly, as part of an ISO audit. Additional inspections under the AQA program are carried out depending on the firms' performance under the AQA program. Ninety per cent of processing plants and vessels elect to use the FPA system. There are 1400 processors including vessel operators, which also constitute 50 per cent of total seafood processors.

The US requires all seafood imports to be managed using HACCP principles. Under this inspection system exporters must provide AQIS with 'process control documentation', which lists all points of the seafood process chain and meets HACCP principles, minimising the risk of potential hazards to product integrity and product safety. Assistance with HACCP requirements and guidelines is available from AQIS' regional offices or through Export Facilitation Officers in each state (see Contacts section).

AQIS has produced a limited range of "model" manuals, called *Guide to FPA/AQA*, which can be adopted directly by clients or modified to suit individual circumstances. Details of these manuals can be obtained from your local Regional Quality Assurance Manager or by contacting the AQIS QA team in Canberra (see Contacts section).

The compliance and integrity of all AQIS-approved quality assurance management systems are verified by regular auditing. The number and frequency of follow up audits is determined by perceived risks of the category of product, the structural standard of the establishment, producers adherence to HACCP requirements and previous track record.

AQIS costs are cost recovered from its service provision. A list of AQIS costs are available on the AQIS website (<http://www.affa.gov.au/content/output.cfm?ObjectID=D2C48F86-BA1A-11A1-A2200060A1B00044>).

Importing
Government
certification
requirements for
seafood differ from
country to country
and are subject
to change at
the importing
Government's
discretion.

c. Standard US seafood documentation requirements

Importing Government certification requirements for seafood differ from country to country and are subject to change at the importing Government's discretion. All seafood exports must gain certification from a nationally recognised certification body such as AQIS. Certification commonly relates to "fit for human consumption" or "free from radioactivity", but may also require approved laboratory testing if specific product standards need to be met. AQIS can supply certificates and arrange testing procedures if required by the importing Government.

For most seafood products exported to the US certification documentation consists of either a Export Health Certificate (called EX46) or AQIS Letterhead (contact AQIS for details). Both forms certify that the seafood products to be exported have been subject to the controls of an AQIS-audited inspection system that incorporates HACCP for the control of food safety hazards. A new system of export certification called EXDOC (AQIS' Electronic Export Documentation System) has just been introduced for all seafood exporters. Please contact AQIS EXDOC for information (see AQIS contacts or e-mail: <http://www.affa.gov.au/content/output.cfm?ObjectID=F1F59969-34B5-4F98-A8749B51F75660F2>).

EXDOC electronically processes existing Notices of Intention to export (NOIs – EX28 and EX222), now to be known as Requests for Permits (RFPs,) as required by AQIS. EXDOC has run well for the past seven years within the meat industry and is accepted by our current trading partners (excluding the European Union).

The EXDOC system is, basically, a computerisation of the existing manual process. The system electronically links the various categories of users, i.e. exporters, packers, the Australian Customs Service, AQIS documentation staff, AQIS inspection staff, AQIS veterinarians, statutory authorities and the Australian Bureau of Statistics. From the single entry of the necessary information, all the above entities have their respective data requirements satisfied without unnecessary intervention by system users.

The system allows data to be entered electronically using commercial interface software products as opposed to the current use of the paper EX28/222 forms. A by-product of this computerised process is the automatic preparation of the Health Certificate (e.g. EX46, E16, E7) and any additional endorsements. There are many advantages in having access to a central computer system, including standardised editing and business rule interpretation together with improvement in nationwide consistency.

However, certification requirements differ for some selected seafood products. These products may need to comply with additional US regulations, and others are banned from entering the US (see 'Exceptional seafood certification requirements' and 'Restricted seafood product imports', pages 20–21).

d. Gain an export permit for Australian customs clearance

Before prescribed goods can be exported, the exporter must prepare certain export documentation to enable the product to be cleared through the Australian Customs Service.

For those establishments not operating on a QA system or operating under an alternate documentation system, permit documentation must be completed for each export consignment and authorised by the AQIS EXDOC system before shipment.

All export goods requiring a permit should have a Customs export entry, regardless of the value of the consignment.

Export entries may be lodged:

- Electronically, by a registered user, through the use of the Export Integration (EXIT) system, which provides a 24-hour service that aims to transmit a clearance for goods within 10 minutes, provided that requirements are met and no regulatory hurdle is encountered.
- Manually, by completing a written entry and lodging it with the Exports Section of a Customs office. Manual entries can be lodged during normal business hours, Monday to Friday, and Customs aims to have them cleared by close of business next working day, provided requirements are met and no regulatory hurdle is encountered.

The Customs Information Centre can be contacted on 1300 363 263 and further information is available at <http://www.customs.gov.au> or through the *Customs Guide for Business* (<http://www.customs.gov.au/bizlink/index.htm#top>).

US import requirements for seafood

e. Gain US import certification and comply with US Customs and US Food and Drug Administration (FDA) procedural requirements

US Customs and FDA import testing procedures

US Customs Service

The major duty of US Customs is to administer the Tariff Act of 1930 (as amended). Their responsibilities include the assessment and collection of all duties, taxes and fees on imported merchandise, including fish and seafood products, and to provide documentation to the FDA for them to carry out their required testing.

US Food and Drug Administration (FDA)

All imported seafood products are regulated and subject to examination by the US FDA. FDA regulations ensure that seafood products are healthy, free from contamination, unauthorised food additives or preservatives, and chemical residues. FDA regulations apply equally to domestic and imported product.

Before prescribed goods can be exported, the exporter must prepare certain export documentation to enable the product to be cleared through the Australian Customs Service.

All imported seafood products are regulated and subject to examination by the US FDA. FDA regulations ensure that seafood products are healthy, free from contamination, unauthorised food additives or preservatives, and chemical residues.

Imported fish and seafood products are subject to inspection at the time of entry into the US. FDA is generally notified of an importation by submission of the Importers Entry Notice (FDA-700 set). The acceptability of the food products is determined on their compliance with sanitary and phytosanitary protocols through physical, chemical and/or bacteriological analyses. Analyses can be performed for food borne biological hazards such as decomposition and/or microbiological contamination.

Appropriate analysis can also detect adulteration with pesticides and/or industrial chemicals, natural poisons called marine biotoxins and illegal use of colour or food additives. (Information on approved drugs and residue levels in seafood products is available in *APEC Air Shipment of Live and Fresh Fish and Seafood Guidelines* at: http://www.nmfs.noaa.gov/fisheries_trade.htm)

In practice, the US FDA conducts only a small number of inspections on seafood imports, as the tests are expensive and cannot cover all foreign imports of fish and fishery products to the US.

US Customs and FDA procedural requirements

US Customs procedural requirements

When a shipment of seafood reaches the US, the importer (owner, purchaser or licensed customs broker) will file entry documents for the goods with the district or port director at the port of entry. Imported fish or seafood products cannot legally enter the US until the merchandise has been authorised by Customs and the FDA, and estimated duties have been paid. It is the importer's responsibility to arrange the examination and release of the goods. To ensure the expeditious processing of imported seafood product the following requirements need to be met:

Commercial invoice

A commercial invoice, signed by the seller or shipper, or agent, is acceptable for Customs purposes if it is prepared in accordance with Section 141.86, Customs Regulations, and in the manner customary for a commercial transaction involving goods of the kind covered by the invoice. (Importers and brokers, who use the Automated Broker Interface, may eliminate the paper document.)

The commercial invoice **must** provide the following information, as required by the *Tariff Act*:

i. Commercial invoice

- Prepared in English;
- Port of entry;
- Country of origin;

Note: Country of origin

US Customs laws require each imported article produced abroad to be marked in a conspicuous place as legibly, indelibly and permanently as the nature of the article permits, with the English name of the country of origin of the manufacturer, producer or grower.

Live fish and seafood are exempted from being individually marked by Section 304 of the Tariff Act because they are “an article that is incapable of being marked”. Individual pieces of fresh fish and seafood packed in wholesale containers are also exempted from marking, and the marking should be found on the container.

Containers that contain live fish and seafood must be marked with the name of country of origin, and constructed so that they can be opened readily for inspection.

- Date of issue of the invoice;
- Name and address of the supplier;
- Name and address of the importer;
- Marks and number of packages;
- Gross and net weight and measurements of each package;
- Full description of the goods; and

Note: Seafood market names in the US. Exporters must ensure that the product is identified with a common or market name that is acceptable to the US. The US “Seafood Names List” ensures that the buyer and seller are talking about the same species of seafood. The list is available at <http://vm.cfsan.fda.gov/~frf/seaintro.html>

- Total product value for Customs.

ii. Individual package labelling requirements

- Prepared in English, typewritten or in other non-erasable medium;
- Shipper’s mark;
- Country of origin;
- Port of entry;
- Weight marking (in pounds and kilograms);
- Number of packages and size of cases (in inches and centimetres);
- Handling marks (international pictorial symbols);
- Cautionary markings; and
- Labels for perishable products.

Tips for ensuring US Customs compliance

- Include all information required on the Customs invoice;
- Observe closely the instructions on invoicing, packaging, marking, labelling etc. sent by the US buyer. The buyers have probably made a careful check of the requirements that will have to be met with the product;
- Show on the invoice a detailed description of each item of goods in each individual package, and mark and number each package so that it can be identified with the corresponding marks and numbers appearing on the invoice;

- Mark the goods legibly and conspicuously with the name of the country of origin, making sure to comply with the marking requirements of the country of origin and the US;
- Comply with the provisions of any special laws of the US that may apply to your goods, such as FDA laws relating to fish and seafood products;
- Establish sound security procedures at the production facility and while goods are in transit for shipment; and
- If a licensed customs broker is used to handle the transaction, consider using a firm that uses the Automated Broker Interface (ABI).

FDA procedural requirements

To ensure the FDA is notified of all regulated products imported into the US, the importer, or the importer's representative, must file an entry notice and acquire a bond to cover the imported goods for release with the US Customs Service. FDA is notified by Customs of the entry and decides on the article's admissibility. The procedure is outlined below:

1. Importer or agent files entry documents with US Customs Service within five working days of the date of arrival of a shipment at a port of entry.
2. FDA is notified of an entry or a regulated food through:
 - Duplicate copies of Customs Entry Documents (CF 3461, CF 3461 ALT, CF 7501 or alternative);
 - Copy of commercial invoice; and
 - Surety to cover potential duties, taxes and penalties.
3. FDA reviews the entry documents received from Customs for all seafood entries. The Agency then decides whether to release, visually examine, or sample a given shipment.
- 4a. If a decision is made not to collect a sample the FDA sends a "May Proceed Notice" to US Customs and the importer of record. The shipment is released as far as FDA is concerned.
- 4b. A decision to collect a sample based on:
 - Nature of the product;
 - FDA priorities; and
 - Past history of the commodity.

FDA sends a "Notice of Sampling" to US Customs and the importer of record. The shipment must be held intact pending further notice. A sample is collected from the shipment. The importer of record may move the shipment from the airport to another port or warehouse.
5. If FDA obtains a physical sample it is sent to an FDA district laboratory for analysis.

- 6a. If analysis finds the sample in compliance with requirements the FDA sends a “Release Notice” to US Customs and the importer of record.
- 6b. If analysis determines that the sample “appears to be in violation of the Food, Drug and Cosmetic Act and other Acts” the FDA sends US Customs and the importer a record of Notice of Detention and Hearing which:
 - Specifies the nature of violation(s); and
 - Gives the importer of record 10 working days to introduce testimony as to the admissibility of the shipment. The hearing is the importer’s only opportunity to present a defence of the importation and/or present evidence as to how the shipment may be made eligible for entry. The importer has the choice of reconditioning the product (i.e. bringing the article into compliance, if this can be done), destroying it or re-exporting it.
7. If FDA approves the importers proposed reconditioning procedure, the reconditioning may then proceed under FDA supervision.
8. If the reconditioning is successful, FDA may release the goods; if not, the goods must be re-exported or destroyed, under US Customs supervision.

Note: When an imported product is found to be repeatedly non-compliant, or if it has been found to be a serious health hazard, FDA may detain all future shipments of that product without sampling (a policy known as “detention without physical examination”), until the shipper, producer or responsible government agency of the exporting country produces evidence to FDA’s satisfaction that the shipments conform with the requirements of the FDC Act. When a product is subject to detention without physical examination, it must be analysed by a private laboratory and the results reviewed by FDA before the product may be admitted into US commerce.

Tips for ensuring FDA compliance

- Determine before shipment that the product to be imported is legal;
- Ensure that your product passes the approved FDA and Environmental Protection Agency’s (EPA) tolerances, action levels and guidance levels for fish and seafood products;
- Ensure your product does not contain residues of banned aquaculture drugs;
- Become acquainted with FDA’s legal requirements before contracting for a shipment;
- Request assistance from the FDA District Office responsible for selected port of entry (if required); and
- Know and understand the “FDA Food Importing Procedures” provided above.

(A comprehensive set of US Customs and FDA procedures is provided in the following publication: “APEC Air Shipment of Live and Fresh Fish and Seafood Guidelines” which is available at http://www.nmfs.noaa.gov/fisheries_trade.htm)

Tariff barriers do not constitute a major restriction to Australian trade with the US in fisheries products.

f. US fisheries tariffs

Tariff barriers do not constitute a major restriction to Australian trade with the US in fisheries products. US tariffs on fisheries products are extremely low and depend on product and preferential trade arrangements between trading countries. Current levels of tariffs for seafood are available at <http://dataweb.usitc.gov>. In this table Australia is considered under General Tariffs in column 1.

The rate of tariff for Australia’s principal fisheries exports include:

| | |
|----------------------|---------|
| Rock lobster | 0% |
| Tuna | 0–12.5% |
| Prawns | 0% |
| Abalone | 0% |
| Scallops | 0% |
| Fish fillets | 0–6% |
| Other whole fish | 0% |
| Pearls | 0% |
| Other | |
| Crab | 0–7.5% |
| Orange roughy | 0% |
| Salmon | 0–5% |
| Patagonian toothfish | 0% |

Note: Some processed fisheries products attract a higher rate of tariff.

g. Exceptional seafood certification requirements

Prawns/shrimp

In 1996, the United States banned all imports of prawn products from countries that did not incorporate ‘Turtle Exclusion Devices’ (TEDs) into their nets, as a bycatch prevention measure.

In September 2000, the Northern Prawn Fishery (NPF) joined the Spencer Gulf Fishery (SGF) as the second of two Australian prawn fisheries certified to export TED compliant prawns to the US market. (Work is also underway to ensure that other Australian prawn fisheries become TED compliant.)

As part of US certification requirements, each shipment of NPF prawns is to be accompanied by a form signed by an authorised government official certifying the prawns in the shipment were taken from the NPF with the use of TEDs. The Australian Fisheries Management Authority (AFMA) manages this process (see Commonwealth Government Contacts section).

Bi-valve molluscs

The US FDA, under the US National Shellfish Sanitation Program, regulates bi-valve molluscs. Only bi-valve molluscs sourced from areas that comply with the Australian Shellfish Sanitary Program, are registered with the FDA “Shellfish Shippers” list and comply with CFR21 labelling requirements are eligible for export to the US. Details of requirements are available at <http://vm.cfsan.fda.gov/seafood1.html>.

Scampi

Labelling policy of the FDA recognises the only description of scampi as lobsterette.

h. Restricted seafood product imports

Live oyster

Australian exports to the US are currently banned.

Other seafood restrictions

The US also has a number of species that have restricted access for environmental reasons and in recognition of international agreements. Certification procedures for these products are contained in the following websites:

- Billfish: <http://www.nmfs.noaa.gov/trade/billfish.htm>
- Patagonian toothfish: <http://www.nmfs.noaa.gov/trade/toothfish.htm>
- Pacific Bluefin Tuna Import/Export Program: <http://swr.ucsd.edu/fmd/bluefin.htm>
- Sturgeon and CITES: <http://www.nmfs.noaa.gov/trade/requirements.htm>
- Swordfish: <http://www.nmfs.noaa.gov/sfa/swordfis.htm>

i. Bonded warehouses

A US Customs bonded warehouse is a building or other secured area in which dutiable goods may be stored, manipulated or undergo manufacturing operations without payment of duty.

When goods enter the warehouse, the importer and warehouse proprietor incur liability under a bond. The liability is cancelled when the goods are one of the following:

- exported;
- withdrawn for supplies to a vessel or aircraft in international traffic;
- destroyed under Customs supervision; or
- withdrawn for consumption within the US after payment of duty and FDA approval.

Types of customs bonded warehouses

The following classes of authorised Customs bonded warehouses may be applicable to holding live and fresh seafood products:

- Premises owned or leased by the US Government and used to store merchandise that is undergoing Customs examination, is under seizure, or is pending final release from the Customs custody. Unclaimed merchandise stored in such premises will be held under “general order.” When such premises are not sufficient or available for the storage of seized or unclaimed goods, the goods may be stored in a Class 3 or 4 warehouse;
- Importers’ private bonded warehouses used exclusively to store merchandise belonging or consigned to the proprietor. A Class 4 or 5 warehouse may be bonded exclusively to store goods imported by the proprietor, in which case it should be known as a private bonded warehouse;
- Public bonded warehouse used exclusively to store imported merchandise;
- Bonded yards or sheds for the storage of heavy and bulky imported merchandise, feeding pens, corrals or other enclosures for the storage of imported animals (live products); and tanks for storing imported liquid merchandise in bulk;
- Bonded warehouses established for the cleaning, sorting, re-packing or otherwise changing the condition, but not the manufacturing, of imported merchandise, under Customs supervision, and at the expense of the proprietor; and
- Bonded warehouses, known as “duty free stores”, used for selling conditionally duty-free merchandise for use outside the Customs territory. Merchandise in this class must be owned or sold by the proprietor and delivered from the warehouse to an airport or other exit point for exportation by, or on behalf of, individuals departing from the Customs territory for foreign destinations.

Advantages of using a bonded warehouse

No duty is collected until merchandise is withdrawn for consumption. An importer, therefore, has control over use of money until the bond is paid on withdrawal of merchandise from the bonded warehouse. If no domestic buyer is found for the imported articles, the importer can sell the merchandise for export, cancelling the obligation to pay duty.

Many items subject to quota or other restrictions may be stored in a bonded warehouse. Check with the Customs office to ascertain if live and fresh fish and seafood can be stored.

Goods may be entered for consumption, entered for warehouse at the port of arrival or transported in-bond to another port of entry and entered there under the same conditions as the port of arrival.

CHAPTER 3

Industry contacts and market information sources

- US Seafood Market Information;
- US Seafood Industry Contacts;
- Australian Seafood Export Market Information; and
- Australian Seafood Industry Contracts.

US seafood market information

The National Marine Fisheries Service (NMFS) maintains a database of trade information at: <http://www.st.nmfs.gov/st1/trade/index.html>. The database can provide the following information:

| | |
|----------------------------|--|
| Current data (2 month lag) | Trade by country Trade by product Trade by district |
| Annual data | Trade by product and country Trade by country and product Trade by country Trade balance for product Trade balance for country |
| Monthly data | Trade by product and country Trade by country and product Trade by country Trade balance for product Trade balance for country |

US seafood market trade news

In addition, the NMFS provides regular updates of the state of US seafood markets (http://www.st.nmfs.gov/st1/market_news/index.html).

NMFS northeast region reports

- New York
 - Fulton Fish Market fresh prices (daily)
 - Weekly New York frozen prices (Friday)
- Boston
 - New England auction prices (daily)
 - Boston lobster prices (daily, except Wednesday)
 - Weekly Boston frozen market prices (Wednesday)
 - Weekly New England auction summary (Friday)
 - Weekly New England cold storage holdings (Friday)

NMFS southeast region reports

- Weekly gulf shrimp landings by area and species (Monday)
- Weekly ex-vessel gulf fresh shrimp prices and landings (Monday)
- Weekly gulf finfish and shellfish landings (Monday)
- Weekly fish meal and oil prices (Thursday)
- Monthly gulf coast shrimp statistics
- Monthly Menhaden purse seine landings

NMFS southwest region reports

- Canned tuna import update
- San Pedro market fish receipts
- Japanese shrimp imports
- Japanese fishery exports
- Japanese fishery imports
- Japanese cold storage holdings
- Tokyo wholesale shrimp prices
- Tokyo wholesale prices
- Fish landings and average ex-vessel prices
- Sales volume and average wholesale prices

NMFS northwest region reports

- Oregon weekly prices with comparison report
- Seattle wholesale producer prices

NMFS headquarters reports

- Monthly national cold storage holdings (final reports available below)
- Monthly imports of shrimp
- Monthly imports of frozen fish blocks
- Monthly imports of selected fishery products
- Monthly exports of selected fishery products
- Quarterly fish meal and oil production (first quarter)
- Quarterly fish meal and oil production (second quarter)
- Quarterly fish meal and oil production (third quarter)
- Quarterly fish meal and oil production (fourth quarter)
- Market news abbreviations

US seafood industry contacts

NMFS directories provide sources of contact information on the US seafood industry. They are available from their website at <http://www.nmfs.noaa.gov/trade/> ... [Seafood dealers].

Seafood dealer directories include:

- Wholesale seafood dealers
- Importers of fishery products
- Seafood processors
- Exporters of fishery products
- Seafood brokers
- Retail seafood dealers
- Seafood industry related services/products
- Import/export/customs contacts
- Government agencies
- Seafood safety/inspection contacts
- Seafood associations
- Seafood publications/publishers
- Trade associations/chambers of commerce/consulates/embassies
- Seafood consultants
- Seafood processing equipment and supplies
- Seafood restaurants
- Seafood buyers
- Commercial gear/insurance/fish meal/shows/etc.
- Customs House Brokers (CHBs), freight forwarders and transporters who handle seafood
- Cold storage facilities
- Aquaculture seafood products, including aquaculture equipment and supplies and list of aquaculture publications/associations
- Aquaculture contacts
- Brand names of seafood
- Seafood contacts
- Tropical fish dealers

NMFS directories provide sources of contact information on the US seafood industry

The NMFS can also provide the seafood industry with advice in the following areas:

- Trade leads;
- Seafood marketing;
- Fishery statistics;
- Quantities;
- Ex-vessel prices;
- Sources from maintained seafood databases on a PC;
- Seafood industry rules/regulation (who, what, where, when, and how);
- Import rules;
- FDA;
- Customs;
- Customs House Brokers;
- Seafood inspection;
- HACCP;
- Licenses;
- Commercial/recreations;
- Species names: common, scientific (Latin), Spanish, etc.; and
- Provide custom computer lists of sources of seafood to buyers and sellers.

The following seafood industry reports are available on the Internet.

Aquaculture seafood products

This directory enables US fishers and seafood dealers to identify seafood dealers who produce and/or sell aquaculture seafood products or supplies. In addition, separate lists of aquaculture associations, consultants and publications/publishers have been added. This directory contains the names, addresses and telephone numbers of seafood dealers who sell aquaculture products or supplies, suppliers of aquaculture equipment and supplies, and aquaculture associations and publishers.

Brand names of seafood

This directory enables US buyers to identify seafood products by brand name and where to find a seafood dealer who handles it. This directory contains brand names, names of firms, addresses and telephone numbers of seafood dealers who handle the brand.

Cold storage facilities

This directory enables the seafood industry to locate cold storage facilities. This directory contains the names, addresses and telephone numbers of cold storage facilities.

Customs house brokers (CHBs), freight forwarders and transporters who handle seafood

This directory enables US buyers to identify CHBs, freight forwarders and transporters who handle seafood. This directory contains the name, address and phone number of CHBs/freight forwarders. The CHBs, freight forwarders, and transporters listed have import/export, freight forwarding and transportation experience.

Exporters of fisheries products

This directory enables foreign buyers to identify US exporters of US fishery products. This directory contains the names, addresses and phone numbers of US seafood exporters, type of product, country to which normally exported and species exported. To reduce space, codes have been used, in some cases, to indicate the country to which the seafood is exported and codes to indicate the species exported rather than spell out the entire name. Other seafood products not listed may be available for export upon request.

Importers of fishery products

This directory enables US buyers to identify primary receivers of imported fishery products. This directory contains the names, addresses and phone numbers of primary receivers, type of product, country of origin and species imported. To reduce space, codes have been used in some cases to indicate the country from which the seafood came and to indicate the species imported rather than spell out the entire name. Other seafood products not listed may be available upon request.

Foreign country seafood exporters list

This directory helps US seafood importers identify primary sources of exported fishery products in foreign countries, which provide 60 per cent of the seafood consumed in the US. This directory contains the countries, names, addresses and phone numbers of exporters, type of product, and species exported. To reduce space, some codes have been used to indicate the species exported rather than spell out the entire name.

This exporters list was compiled from public sources from information provided by foreign trade commissions, foreign chambers of commerce, consulates and embassies. This list is merely to help US importers contact exporters of seafood in the foreign countries listed and should not be taken as a recommendation of the firms. The companies listed handle the products indicated, but other seafood products not listed may be available upon request.

Retail seafood dealers

This directory was produced to enable the seafood industry to identify retail users of seafood. This directory contains the names, addresses and telephone numbers of retail seafood dealers.

Seafood brokers

This directory enables US buyers/sellers of seafood to identify seafood brokers. It contains the names, addresses and telephone numbers of seafood brokers.

Seafood contacts list

This directory enables seafood dealers to contact key seafood industry personnel by name and the seafood firms with which they are associated. It contains the names of the seafood firms, and addresses and phone numbers of key seafood industry personnel (owners, salesperson, buyers, etc.).

Seafood processing equipment, supplies and related seafood industry products

This directory enables seafood dealers to identify sources of related seafood industry services and products, e.g. sources of packaging, buyers, scales, seafood trade associations, seafood magazines/newsletters, seafood consultants, HACCP/laboratories/training, etc. It contains the names, addresses and telephone numbers of related seafood industries.

Seafood industry related services

This directory enables seafood dealers to identify sources of related seafood industry services, e.g. seafood trade associations, seafood magazines/newsletters, government agencies, seafood consultants, HACCP/laboratories/training, chambers of commerce/trade commissions/consulates/embassies, import/export/customs contacts, suppliers of fish meal, seafood buyers, etc. It contains the names, addresses and telephone numbers of related seafood service industries.

Seafood processors

This directory enables US fishers and seafood dealers to identify seafood processors. It contains the names, addresses and telephone numbers of seafood processors.

Tropical fish dealers

This directory enables the seafood industry to identify tropical fish dealers. It contains the names, addresses and telephone numbers of tropical fish dealers.

Wholesale seafood dealers

This directory enables the seafood industry to identify wholesale sources of seafood. It contains the names, addresses and telephone numbers of wholesale seafood dealers.

Wholesale seafood distributors

This directory enables the seafood industry to identify wholesale sources of seafood who also distribute product. It contains the names, addresses and telephone numbers of wholesale seafood distributors.

Additional information on these directories may be obtained from the NMFS:

US National Marine Fisheries Service (NMFS)

Attention: Kim Newlin

75 Virginia Beach Drive

Miami Florida 33149

Tel: (305) 361 4464 Office

Fax: (305) 361 4219

E-mail: kim.newlin@noaa.gov

Australian seafood export market information

Australian Bureau of Agricultural and Resource Economics

The Australian Bureau of Agricultural and Resource Economics' (ABARE) annual *Australian Fisheries Statistics* publication provides a thorough summary of the catch information and trade in fisheries products for each year. Information in the report includes:

- Australian fisheries production, by value and tonnage, State/Commonwealth, species, wild caught and aquaculture, edible and inedible;
- Australian fisheries exports, by value and tonnage, state, species, wild caught and aquaculture, export markets, edible and inedible; and
- Australian fisheries imports, by value and tonnage, product, source, species, preparation, edible and inedible.

Australian Fisheries Statistics – 2001 is available from ABARE's Online Bookshop at a cost of A\$42. An abstract of the publication can be viewed at:
<http://abareonlineshop.com/prodsearchresults.asp?browse=true>.

Australian Bureau of Statistics

<http://www.abs.gov.au>

The Australian Bureau of Statistics (ABS) provides up-to-date statistical information on the volume and value of seafood exports and imports. Raw data is provided by Australian Customs, processed by ABS and made available to subscribers with a one-month time lag. This is the most up-to-date information available on Australia's trade in seafood.

ABS will tailor packages to subscribers needs. The fee will be determined by the labour costs involved in accessing the ABS database.

As a first point of contact, an ABS consultant can be reached on 1300 135 070 or at client.services@abs.gov.au

ABARE's annual *Australian Fisheries Statistics* publication provides a thorough summary of the catch information and trade in fisheries products for each year.

Australian seafood industry contracts

The 2001 *Australian Seafood Industry Directory* is produced by Seafood Services Australia (<http://www.seafoodservices.com.au/>). The Directory provides contact details for:

- Aquaculturists;
- Commonwealth Government departments and agencies;
- State Government and agencies;
- Consultants;
- Education and training providers;
- Freight forwarders;
- Industry equipment and accessory distributors;
- Industry organisations;
- Information services;
- Packaging providers;
- Post harvest providers (wholesalers, importers, exporters, agents and storage facilities); and
- Research and development organisations.

The *Australian Seafood Industry Directory* is available in hard copy and CD-Rom database formats at a cost of A\$27.50 (including postage).

Copies can be obtained from:

Seafood Services Australia
PO Box 403
Hamilton Queensland 4007
Toll free: 1300 130 321
Tel: (07) 3633 6777
Fax: (07) 3633 6776

CHAPTER 4

Commonwealth and State/Territory Government assistance

How each department can assist in the export of seafood products and their contact details:

- Department of Agriculture, Fisheries and Forestry – Australia (AFFA)
- Australian Quarantine and Inspection Service (AQIS)
- Australian Customs Service
- AusTRADE
 - The Export Market Development Grant Scheme (EMDG)
- Australian Fisheries Management Authority (AFMA)
- Export Finance and Insurance Corporation (EFIC)

Department of Agriculture, Fisheries and Forestry – Australia

<http://www.affa.gov.au>

Fisheries and Aquaculture Industries

Fisheries and Aquaculture Industries in AFFA coordinates Commonwealth Fisheries Policy and has specialist sub-sections dealing with trade and market access, domestic and international fisheries policy and aquaculture.

Mr Glenn Hurry, Assistant Secretary
Fisheries and Aquaculture Industries
(Commonwealth Fisheries Policy)
PO Box 858
Canberra ACT 2601
Tel: (02) 6272 5777
E-mail: glenn.hurry@affa.gov.au

Fisheries and Aquaculture Industries in AFFA coordinates Commonwealth Fisheries Policy and has specialist sub-sections dealing with trade and market access, domestic and international fisheries policy and aquaculture.

Australian Quarantine and Inspection Service

<http://www.aqis.gov.au>

AQIS advises/assists existing and potential exporters of agricultural/fisheries products and processed foods, through its Export Facilitation Program. The five export facilitation officers provide information free of charge on the following topics:

- other countries, import conditions;
- Australian legislative requirements for export;
- documentation including export permits, health, phytosanitary and other certificates;
- AQIS quality assurance arrangements (i.e. obtaining assistance from AQIS' QA team);
- premises' registration requirements;
- inspection procedures; and
- AQIS fees and charges.

The export facilitators can also act as the initial contact point for exporters experiencing difficulties with government health documentation or other quarantine barriers. New exporters unfamiliar with Australia's exporting requirements and the importing country's requirements will find the export facilitators especially helpful. If an issue does not come under AQIS' jurisdiction, the facilitation officer can refer clients to other relevant agencies that may be able to assist.

Export facilitation officers

Queensland

Tel: (07) 3246 8709
Fax: (07) 3246 8652
E-mail: qldexport@aqis.gov.au

Victoria/Tasmania

Tel: (03) 9246 6702
Fax: (03) 9246 6864
E-mail: victaexport@aqis.gov.au

South Australia/Northern Territory

Tel: (08) 8305 9713
Fax: (08) 8305 9824
E-mail: santexport@aqis.gov.au

Western Australia

Tel: (08) 9311 5437
Fax: (08) 9455 3052
E-mail: waexport@aqis.gov.au

New South Wales

Tel: (02) 8838 3103
Fax: (02) 9630 4560
E-mail: nswexport@aqis.gov.au

AQIS National Office

Free call from within Australia:
1800 020 504
Tel: (02) 6272 3933

AQIS EXDOC

Bev Beacham, EXDOC Administrator
Tel: (02) 6272 5728
Fax: (02) 6272 3745
E-mail: bev.beacham@aqis.gov.au

AQIS advises and assists existing and potential exporters of agricultural/ fisheries products and processed foods, through its Export Facilitation Program.

Australian Customs Service

<http://www.customs.gov.au>

The Customs Guide for Business

The Customs Guide for Business is designed for all who interact with the Australian Customs Service — importers, exporters, local manufacturers or producers. While the guide provides a useful source of information for all Customs clients, it is focused on assisting small business. This includes businesses that have not previously been involved in international trade. Customs recognises that small business is important to the economic future of Australia and intends to provide information that will assist small business in dealing with Customs procedures.

An overview of Customs rules, regulations and processes is provided to explain some of the Customs issues when importing, exporting or locally manufacturing goods. The guide also draws attention to other legislative requirements to successfully complete importing/exporting/manufacturing obligations.

The Customs Guide to Business is available at
<http://www.customs.gov.au/bizlink/index.htm#top>

Customs Information Centre: 1300 363 263

AusTRADE

<http://www.AusTRADE.gov.au>

An Exporter's Guide to AusTRADE

The AusTRADE Advisory Service

The Advisory Services number 13 28 78 is the first point of contact for any business interested in exporting. AusTRADE's role is to help boost Australia's export earnings, so AusTRADE concentrates on firms that are ready to export. The Advisory Service helps companies determine if they are ready to export and provides initial advice and general market information, which helps in deciding how best to proceed. If AusTRADE cannot help you, you will be referred to the appropriate government or private service provider that can.

TradeStart

<http://www.austrade.gov.au/> (New Exporters Information) (Trade Start)

TradeStart is a national network of export assistance offices in partnership between AusTRADE and a range of local private and public sector organisations throughout Australia. TradeStart is an integral part of AusTRADE's domestic network.

AusTRADE and TradeStart offer a package of free services designed to assist small and medium sized Australian companies develop their business overseas and make their first export sale.

AusTRADE's
Advisory Services
number 13 28 78
is the first point of
contact for any
business interested
in exporting.

AusTRADE's
Export Market
Development
Grants scheme
encourages
Australian
exporters to seek
out and develop
overseas markets.

Services and benefits

AusTRADE and TradeStart's services for new exporters provide eligible businesses with practical assistance to develop your business into a successful exporting company. Your export adviser and AusTRADE's international network will help to:

- Assess your export capability
 - Review your export capability and evaluate export readiness
 - Identify target markets
 - Provide advice on financial and management issues
- Prepare for your selected market
 - Advise on international marketing strategies and your marketing plan
 - Provide feedback on promotional material
 - Inform you of economic conditions and commercial practices in your target markets
 - Evaluate the suitability of your product/service for target markets
- Visit your selected market
 - Make appointments with selected relevant business contacts
 - Arrange interpreters and translation of documents (at your cost)
 - Briefings by AusTRADE staff in-market on local practices and culture
- Follow through by your export adviser
 - Assess the outcomes of your visit
 - Assist you to achieve maximum impact from the visit

For further information call: 13 78 28

In-market services

Through its global network of offices, AusTRADE can provide a range of in-market services. They include setting up appointments with distributors or other useful contacts, providing on-the-spot briefing on the local business culture and environment, organising interpreters and office facilities, attending meetings to help overcome language or cultural barriers, organising product launches and seminars, and preparing publicity material.

AusTRADE online

AusTRADE's website, www.austrade.gov.au, provides a comprehensive and up-to-date export information service on international trade issues, export programs and overseas markets.

Export Market Development Grants (EMDG) — Financial assistance for exporters

<http://www.austrade.gov.au/exportgrant>

AusTRADE's Export Market Development Grants (EMDG) scheme encourages Australian exporters to seek out and develop overseas markets. Under the scheme, eligible businesses are reimbursed for part of their export marketing costs.

The EMDG scheme assists small and medium Australian exporters committed to, and capable of, seeking out and developing export business by repaying part of their promotional expenses. Applicants may qualify for up to 50 per cent reimbursement of eligible export marketing expenses above A\$15,000 per annum to a maximum of eight grants. Up to A\$200,000 per annum may be reimbursed.

Australian Fisheries Management Authority

<http://www.afma.gov.au>

AFMA is the Commonwealth statutory authority responsible for the efficient management of Commonwealth fisheries resources on behalf of the Australian community and key stakeholders. AFMA manages fisheries within the 200 nautical mile Australian Fishing Zone and, in some cases, by agreement with the Australian states, to the low-water mark. In doing so, AFMA provides management, advisory, compliance and licensing services and implements appropriate fisheries management arrangements.

US prawn/shrimp certification

In September 2000, the Northern Prawn Fishery joined the Spencer Gulf Fishery as one of the two Australian prawn fisheries certified to export prawns to the US market. US officials assessed the NPF as being compliant with US regulations relating to the use of Turtle Exclusion Devices (TEDs).

As part of US requirements, each shipment to the US is to be accompanied by a form signed by an authorised government official certifying that the prawns in the shipment have been taken with the use of TEDs.

AFMA provides certification for all prawns/shrimp exported to the US. Contact Trysh Stone, Fisheries Manager, Northern Prawn Fishery on 02 6272 5029 for compliance details.

For general contact details see <http://www.afma.gov.au/contacts.php>

Export Finance and Insurance Corporation

<http://www.efic.gov.au/>

EFIC is Australia's Export Credit Agency. It provides clients with internationally competitive insurance and finance services, particularly for those countries, companies and contracts that the commercial market may not have the capacity to cover.

Under the *Export Finance and Insurance Corporation Act 1991* (EFIC Act), EFIC was established as a statutory corporation of the Commonwealth of Australia to increase Australia's export trade.

EFIC extends its services as far as it can, consistent with preserving the financial viability essential to the Corporation's long-term support of exporters.

AFMA is the Commonwealth statutory authority responsible for the efficient management of Commonwealth fisheries resources on behalf of the Australian community and key stakeholders.

EFIC focuses on the following objectives:

- supporting more exports, especially from small to medium sized companies, consistent with our “market gap” role;
- generating a positive net income to provide sufficient capital for future growth;
- providing quality services to exporters at a sustainable cost; and
- providing quality service to Government in assessing, implementing and administering transactions on the National Interest Account.

EFIC operates primarily in that part of the market that is not served by the private market. At the same time, EFIC is a self-funding organisation operating in accordance with commercial principles.

EFIC’s obligations to third parties are guaranteed by the Commonwealth. This guarantee has not been called in the more than four decades of EFIC’s existence. The Corporation attributes this success to the strong control framework it has implemented for identifying, evaluating and managing risk.

For contact details see: <http://www.efic.gov.au/corporateinfo/contactus.asp>

State and Territory Government fisheries contacts

Western Australian Government

<http://www.wa.gov.au/westfish/>

Fisheries Enquiries
Head Office
Tel: (08) 9482 7333
Fax: (08) 9481 3576
E-mail: headoffice@fish.wa.gov.au

South Australian Government

<http://www.pir.sa.gov.au/>

<http://www.exportsa.sa.gov.au/>

Fisheries Enquiries
Head Office
Tel: (08) 8226 2311
Fax: (08) 8226 2320
E-mail: todd.jeff@saugov.sa.gov.au

Queensland Government

<http://www.dpi.qld.gov.au/fishweb/>

<http://www.seafoodsite.com.au/default.htm>

DPI Call Centre

Tel: (07) 3404 6999

Fax: (07) 3404 6900

E-mail: callweb@dpi.qld.gov.au

Tasmanian Government

<http://www.dpif.tas.gov.au/> (Wild [saltwater] fishing and aquaculture)

<http://www.ifs.tas.gov.au/> (Freshwater fishing and aquaculture)

Fishing Management Branch

Tel: (03) 6233 2147

Tel: (03) 6223 1539

E-mail: fishingenquiries@dpiwe.tas.gov.au

New South Wales Government

<http://www.fisheries.nsw.gov.au/>

Office of Commercial Fishing

NSW Fisheries

Tel: (02) 9527 8576

E-mail: information-advisory@fisheries.nsw.gov.au

Northern Territory Government

<http://www.nt.gov.au/dbird/dpif/fisheries/>

Fisheries Division

Tel: (08) 8999 2144

Fax: (08) 8999 2065

E-mail: annette.hughes@nt.gov.au

Victorian Government

<http://www.nre.vic.gov.au/>

NRE Customer Service Centre

Natural Resources and Environment

Tel: 136 186

E-mail: customer.service@nre.vic.gov.au

ACRONYMS

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| ABARE | Australian Bureau of Agricultural and Resource Economics |
| ABI | Automated Broker Interface |
| ABS | Australian Bureau of Statistics |
| AFFA | Agriculture, Fisheries and Forestry – Australia |
| AFMA | Australian Fisheries Management Authority |
| AQA | Approved Quality Assurance |
| AQIS | Australian Quarantine and Inspection Service |
| CHBs | Customs House Brokers |
| CITES | Convention on International Trade in Endangered Species of Wild Fauna and Flora |
| EFIC | Export Finance and Insurance Corporation |
| EMDG | Export Market Development Grant Scheme |
| EPA | Environmental Protection Agency |
| FAO | Food and Aquaculture Organization of the United Nations |
| FDA | US Food and Drug Administration |
| FPA | Food Processing Accreditation |
| GMP | Good Management Practice |
| HACCP | Hazard Analysis and Critical Control Points |
| ISO | International Standards Organisation |
| NMFS | National Marine Fisheries Service |
| NPF | Northern Prawn Fishery |
| QA | Quality Assurance |
| SGF | Spencer Gulf Fishery |
| TED | Turtle Exclusion Device |
| US | United States |