

HK\$15 billion reasons to access the Hong Kong seafood market

A guide to exporting Australia's fisheries products to the Hong Kong SAR

Jim Fitzgerald



Australian Government
Department of Agriculture,
Fisheries and Forestry



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September 2005



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Fisheries and Forestry**



HK\$15 billion reasons to access the Hong Kong seafood market — A guide to exporting Australia's fisheries products to the Hong Kong Special Administrative Region, China

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FOREWORD



At a time when many world markets for seafood are adopting a more protectionist approach to trade, Hong Kong SAR offers a trading environment characterised by zero tariffs, zero taxes, few technical barriers to trade and a relatively transparent and open market system.

In 2003–04, the value of seafood exports to the Hong Kong SAR was more than A\$590 million and, for the first time, it replaced Japan as Australia’s most significant seafood export destination. Hong Kong SAR is a major hub for on-selling seafood throughout the Asian region, as many Australian exporters are well aware, and has a well-developed entrepreneurial culture and strong business and banking systems.

Hong Kong SAR — like all trading nations — has its own set of rules and regulations for seafood trade. These regulations govern all aspects of the seafood industry, including import and health requirements. *HK\$15 billion reasons to access the Hong Kong seafood market* seeks to unlock the processes required to access this lucrative market and highlight potential opportunities for the Australian seafood industry.

It is the third in a series of publications produced by the Australian Government in association with the Australian Seafood Industry Council (ASIC). It follows on from the popular *A\$34 billion reasons to access the US seafood market* and *A\$40 billion reasons to access the EU seafood market*.

Future publications in the series will address opportunities for Australian seafood exporters in mainland China and India. The reports are part of the Australian Government’s wider strategy to improve market access and profitability of the fisheries industry.

I would like to thank the Australian seafood industry for its generous support and advice as I enter into my second successive term as Minister for Fisheries. I look forward to continue to work closely with the seafood industry to resolve the raft of challenging issues that face the industry over the next decade in order to ensure its long-term sustainability.

Once again, I would like to wish you a successful and prosperous year.

A handwritten signature in black ink that reads "Ian Macdonald". The signature is written in a cursive, slightly slanted style.

Senator the Hon. Ian Macdonald
Australian Government Minister
for Fisheries, Forestry and Conservation

EXECUTIVE SUMMARY

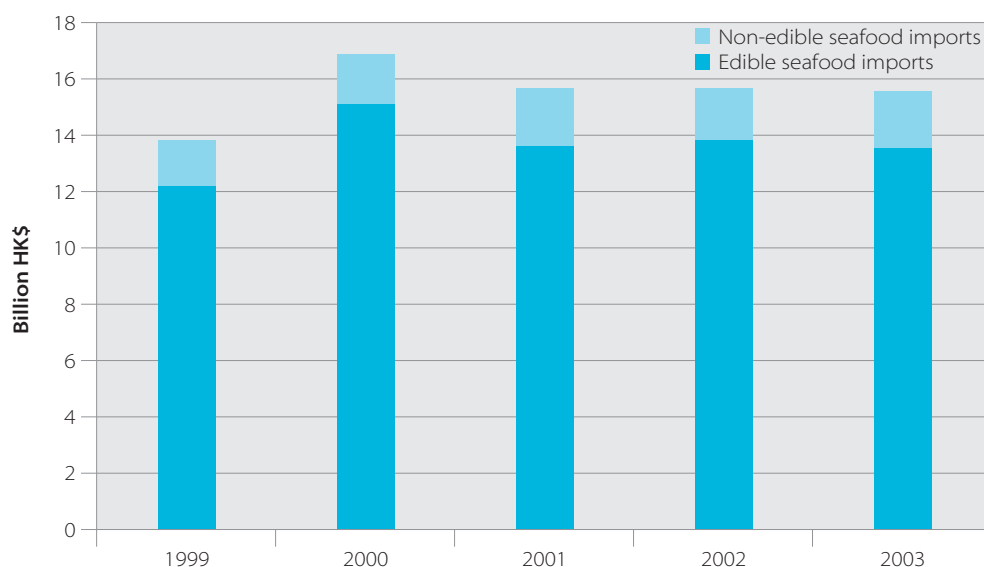
The Hong Kong Special Administrative Region of China (the Hong Kong SAR) is home to more than 6.8 million people. It has a unique role as an international port for trade in seafood products destined for Asian markets and, in particular, mainland China. It is also an important hub for mainland Chinese seafood exports to the rest of the world. While Hong Kong relies heavily on imports to supply its domestic demand for seafood, it has developed extensive, technologically advanced food-processing industries.

The major opportunity (and threat) for the Hong Kong SAR seafood market relates to its trading relationship with mainland China (see Chapter 2). With the development of closer economic ties between the Hong Kong SAR and mainland China, as demonstrated by ‘The Mainland China and Hong Kong SAR Closer Economic Partnership Arrangement (CEPA)’, both parties have signalled they intend to work cooperatively in developing freer trade between them. This relationship will underpin Hong Kong SAR’s future as a hub for trade in the Asian region.

Despite a significantly depreciating currency and the Severe Acute Respiratory Syndrome (SARS) crisis that closed Asian seafood markets for several months during 2003, Hong Kong SAR’s seafood imports rose by HK\$1.8 billion to HK\$15.8 billion from 1999 to 2003 (see Figure 1)¹. The volume of edible seafood imports to the Hong Kong SAR rose by 23 per cent during the five-year period, and reached 336,434 metric tonnes in 2003². The Hong Kong SAR market has demonstrated its underlying strength as a seafood importer for domestic consumption and a re-export hub for the Asian region.

Hong Kong SAR’s seafood imports rose by HK\$1.8 billion to HK\$15.8 billion from 1999 to 2003

Figure 1: Value of total Hong Kong SAR seafood imports 1999–2003



1 Hong Kong SAR Census and Statistics Department

2 Hong Kong SAR Census and Statistics Department

Rising import volumes and lower gross value illustrate its highly competitive nature, with 131 countries exporting seafood to the Hong Kong SAR market in 2003. Consumers are typically discerning and knowledgeable about seafood product and demand high quality and value for money from this competitive market.

Why are we interested in the Hong Kong SAR seafood market?

During 2003–04, the Hong Kong SAR replaced Japan as Australia’s largest seafood export market by value³.

Australian small and medium-sized enterprises (SMEs) seeking international business opportunities see Hong Kong as an excellent first step in developing business ties in the Asia region. It is arguably the easiest market to enter in the region because of its regulatory environment and stability, business skills, infrastructure and legal framework.

The Hong Kong SAR has become — and will continue to expand as — a key market for Australian seafood exports.

- Hong Kong SAR is the world’s sixth largest importer of seafood behind the EU25 (collectively), Japan, the United States, mainland China and the Republic of Korea. It has increased its total volume of seafood trade in the past five years by 23 per cent, despite difficult trading conditions⁴. Trade has been characterised by fluctuating overall economic performance, significant depreciation of the Hong Kong currency against the Australian dollar and the SARS crisis in 2003.
- Hong Kong SAR has an ageing population, rising median household incomes and there is an increase in the participation of women in the workforce⁵. Combined with this, the exposure of the general population to modern western cuisine has led to a more sophisticated and discerning domestic market for all food produce. The market demands high quality and value for money.
- While other traditional markets for Australian seafood exports have declined in value over recent years, mainly because of the Australian dollar’s appreciation since 2001 relative to US-dependent currencies, total seafood exports to Hong Kong SAR have grown.
- Australian seafood producers have a long association with Hong Kong and are the Hong Kong SAR’s second-largest source of imported seafood in dollar terms, behind mainland China.
- The Hong Kong SAR is tariff and tax free for seafood imports.
- While mainland China presents enormous opportunities, its business and cultural environments are highly complex and doing business in China can daunt even the most experienced exporters. The Hong Kong SAR, on the other hand, offers a far less complicated commercial environment.
- The Hong Kong SAR maintains open business practices, has a stable seafood trading system where health, and sanitary rules and regulations for the trade in seafood are relatively consistent, transparent and reliable (see Chapter 3).

During 2003–04,
the Hong Kong
SAR replaced
Japan as Australia’s
largest seafood
export market
by value

Hong Kong SAR
is the world’s sixth
largest importer
of seafood

³ ABARE database

⁴ FAO statistics

⁵ Hong Kong SAR Government website

- The Hong Kong SAR will continue as a hub for seafood trade in the Asian region and to the US, EU and Canada. In 2003, the Hong Kong SAR re-exported one third (HK\$5.1 billion) of its total seafood imports.
- The Chinese mainland accounted for about 35 per cent of Hong Kong SAR seafood exports in 2003, and the two economies have a strengthening trading relationship (see Chapter 2). Contacts and business relationships developed in the Hong Kong SAR can lead to increased business opportunities in the surrounding Asia-Pacific region.
- There are more than 280,000 SMEs in the Hong Kong SAR, with most involved in imports and exports⁶.
- Trade and strong entrepreneurial skills, backed by centuries of trade with the western world, drive the Hong Kong SAR. English is an operating language, providing an ideal environment for Australian firms to conduct business, build partnerships and joint ventures, and develop profitable and lasting business ties.
- The Hong Kong SAR is a regional centre for many multinational companies. It is a major international financial centre, with a strong and reliable banking sector.
- The Hong Kong SAR is a major air transport hub in the Asian region and is relatively close to Australia.
- The Hong Kong SAR has a well organised market system for seafood trade that is overseen by the Government.

Australian seafood production and exports to the Hong Kong SAR

During the past decade, the Australian seafood industry has benefited from strong growth. The value of Australian seafood production (including non-edible production) has increased by 31 per cent — from A\$528 million in 1995–96, to A\$2.2 billion in 2003–04. The volume of seafood production has risen from 224,559 Mt a year to 266,613 Mt a year (19 per cent) over this period⁷.

Several factors have fuelled industry growth. They include: developments in producing and marketing of five key species; on-the-whole favourable economic conditions in major export markets; aquaculture production growth; and, until 2001, the significant depreciation of the Australian dollar against all major currencies.

Since 2001, the value of Australian seafood exports (measured in Australian dollars) has fallen because of the sharp appreciation in our currency compared with our major seafood trading partners. Their currencies are pegged to the performance of the United States dollar (US\$). Since mid-2001 the Australian dollar has appreciated against the US\$ by 53 per cent. The currencies of the Hong Kong SAR and mainland China are pegged to the US\$ and their exchange rates fluctuate at the same rate as the US\$ (see Figure 4)⁸.

The Hong Kong SAR will continue as a hub for seafood trade in the Asian region and to the US, EU and Canada. In 2003, the Hong Kong SAR re-exported one third (HK\$5.1 billion) of its total seafood imports

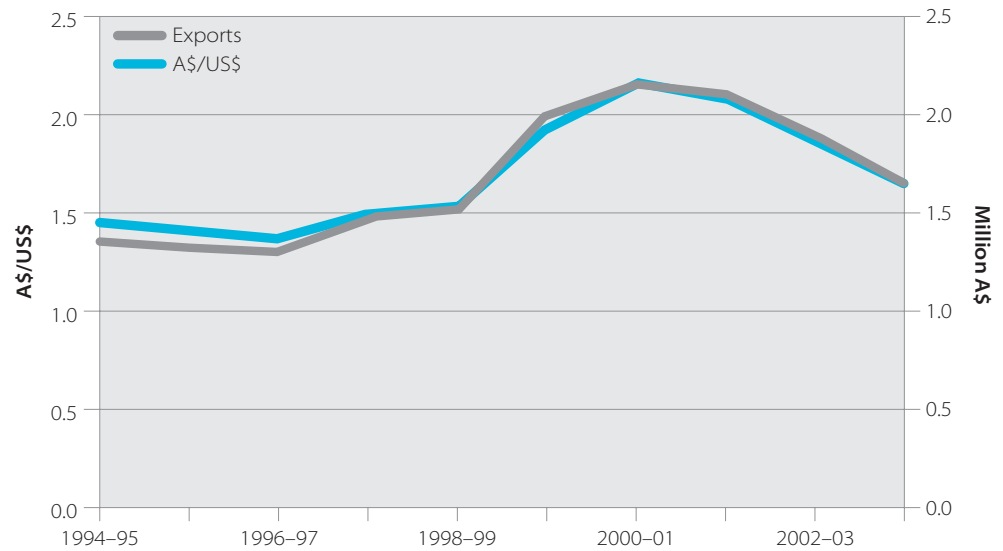
6 Hong Kong SAR Government website

7 ABARE database

8 Reserve Bank of Australia

In 2003–04,
Australian seafood
exports to the
Hong Kong
SAR totalled
A\$590 million

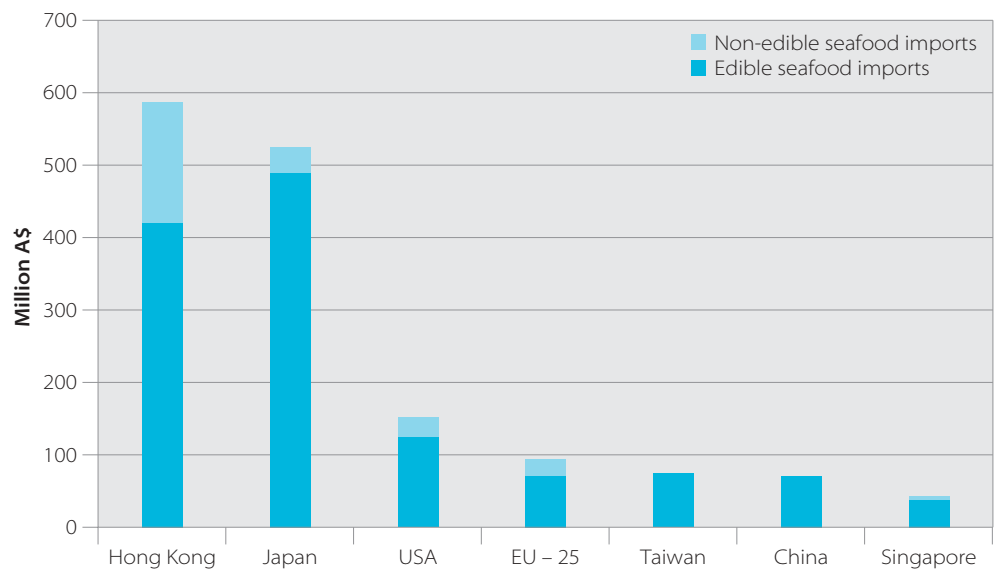
Figure 2. Effect of A\$/US\$ exchange rate fluctuations on the value of total Australian seafood exports



In 2003–04, Australian seafood exports to the Hong Kong SAR totalled A\$590 million. Edible and non-edible seafood exports contributed \$420 million (71 per cent) and \$170 million (29 per cent) respectively. This represented an increase of \$112 million (23 per cent) from 2002–03 (see Figure 13).

Australian seafood exports to the Hong Kong SAR in 2003–04 were dominated by pearls (valued at \$170 million — 29 per cent), lobster (\$165 million — 28 per cent) and abalone (\$140 million — 24 per cent) (see Figure 14). The three products accounted for 81 per cent of the total value of Australia’s seafood exports to the Hong Kong SAR. Other significant export items included: live fish — \$38 million (7 per cent); scallops — \$26 million (4 per cent); and prawns — \$16 million (3 per cent)⁹.

Figure 3: Australian seafood exports 2003–04 by destination



A guide to accessing the Hong Kong SAR seafood market

Australian exporters of live or processed seafood products must meet Australian public health, food safety and customs regulations, as well as any requirements of the importing country, in this case the Hong Kong SAR. Australia's principal agencies involved in providing certification and clearance services are the Australian Quarantine and Inspection Service (AQIS) and the Australian Customs Service (Customs).

AQIS has a dual role. It provides consumer protection and facilitates trade through a reliable, scientifically based and cost-effective quarantine and inspection service. Without the service, market access for Australian food exports to many countries would be compromised (www.aqis.gov.au).

Australian Customs Service regulations require all export goods needing an AQIS permit (i.e. all seafood exports) to be Customs-cleared before leaving the country. This process, which requires filing export documents with Customs, is explained later in this guide. For the Hong Kong SAR, Customs export clearances must be raised through the SEW (Single Electronic Window) in EXDOC (AQIS Electronic Export Documentation System) or alternatively through the use of the manual customs clearance system (see Chapter 3).

To export processed foods from Australia, an exporter must meet the requirements of the *Export Control Act 1982*, Prescribed Goods (General) Orders and the Export Control (Processed Food) Orders, and associated legislation. The exporter must also provide documentation to Customs before disembarkation.

To comply with the regulations, a seafood exporter must meet Australian and Hong Kong SAR requirements as follows:

Australian export requirements

1. Register your export establishment with AQIS.
2. Ensure your export establishment complies with an approved system of inspection.
3. Gain export certification documentation from AQIS, using EXDOC, to satisfy Hong Kong SAR requirements.
4. Obtain an export permit for Australian Customs clearance through the EXDOC/CUSTOMS Single Electronic Window (SEW) or through the manual customs clearance system.

Hong Kong SAR import requirements

5. Meet Customs requirements.
6. Meet health requirements.
7. Meet general shipping requirements.
8. Tariffs and additional taxes do not apply to seafood imports.

Australian exporters of live or processed seafood products must meet Australian public health, food safety and customs regulations, as well as any requirements of the importing country, in this case the Hong Kong SAR

9. Some seafood products are restricted, including CITES/Endangered Species.
10. Apply for a permit to transport fish and seafood products in Hong Kong SAR (where applicable).
11. Seafood marketing and distribution in Hong Kong SAR.

Australian Government assistance for current or potential seafood exporters

Seafood exporters, or potential exporters, have access to several government programs and government agency contact points to help them comply with Australian export and Hong Kong SAR import regulations. Australian, state and territory governments provide these programs across several departments. Appropriate points of contact are provided throughout the guide and are also listed in Chapter 5.

The Australian Government funds a wide range of grant and assistance programs and services to support the seafood industry. However, the Government recognises the difficulties businesses and individuals, especially those in remote and regional areas, can face in identifying and accessing these resources.

The Australian Government recently produced *The FishBook II — A guide to the Australian Government's programs, grants and services for the Australian seafood industry* (October 2005 edition) to help them.

The FishBook II details all programs relevant to Australia's seafood industry under six main categories: primary production (including fisheries and aquaculture); exports, customs and quarantine; innovation, research and development; business and taxation assistance; employment and training; and fisheries and environmental management.

It explains the major objectives, the types of assistance available, and provides details on how to apply as well as contact information for each listed grant, program or service.

The FishBook II lists several key information sources available to the industry, and contains a brief narrative and contact point for each industry-relevant Australian Government department and/or associated agency. It also contains contact points for accessing the seafood assistance programs in each state and territory.

The Australian Government Department of Agriculture, Fisheries and Forestry produced the guide with the Australian Seafood Industry Council (ASIC) and Seafood Services Australia (SSA). You can download it free-of-charge from www.daff.gov.au (Publications) (Fisheries).

Alternatively, you can contact ASIC, on 02 6281 0383, Ted Loveday, SSA — 1300 130 321 or Jim Fitzgerald, DAFF — 02 6272 5573 for a copy.

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CHAPTER 1

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The Hong Kong SAR market for imported seafood

Over the past decade, the total value of edible seafood imports to the Hong Kong SAR has almost doubled, making it the sixth largest importer of seafood behind the EU, Japan, United States, mainland China and the Republic of Korea¹⁰.

In 2003, the total value of the Hong Kong SAR's seafood imports was more than HK\$15.6 billion (A\$3.5 billion)^{11,12}. This represented a decline in seafood imports of HK\$57 million from 2002, associated with a depreciating currency, which is pegged to the US dollar, and the SARS crisis during the first half of the year (see Figure 1). Of total Hong Kong SAR seafood imports, edible seafood made up 87 per cent (HK\$13.6 billion) and non-edible seafood 13 per cent (HK\$2 billion).

A general indicator of the strength of the Hong Kong SAR seafood market over the past five years is the rising volume of edible seafood imports. They increased by 23 per cent from 1999 to 2003, totalling 336,434 metric tonnes in 2003 (see Figure 5).

Over the past decade, the total value of edible seafood imports to the Hong Kong SAR has almost doubled, making it the sixth largest importer of seafood

Figure 4: Comparison of exchange rates 1998–2005

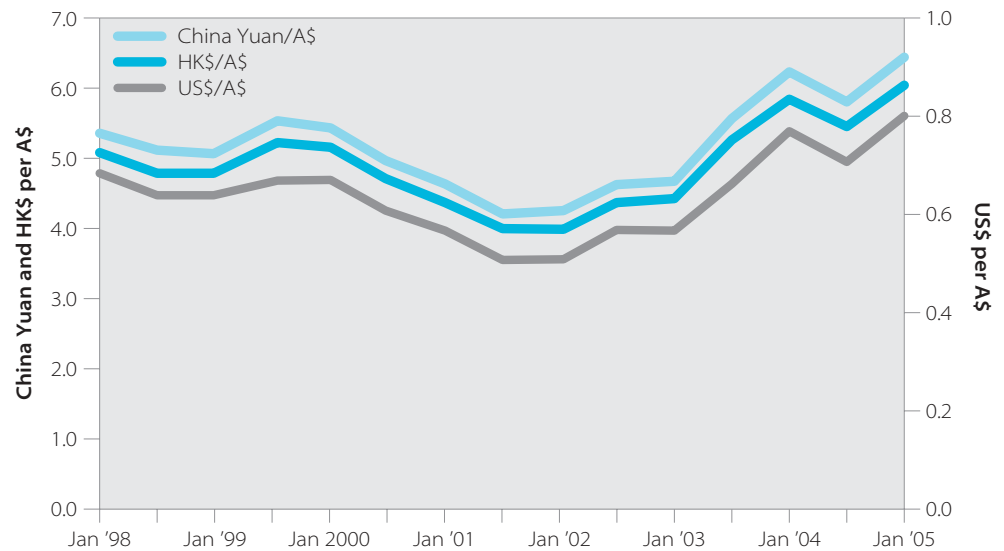
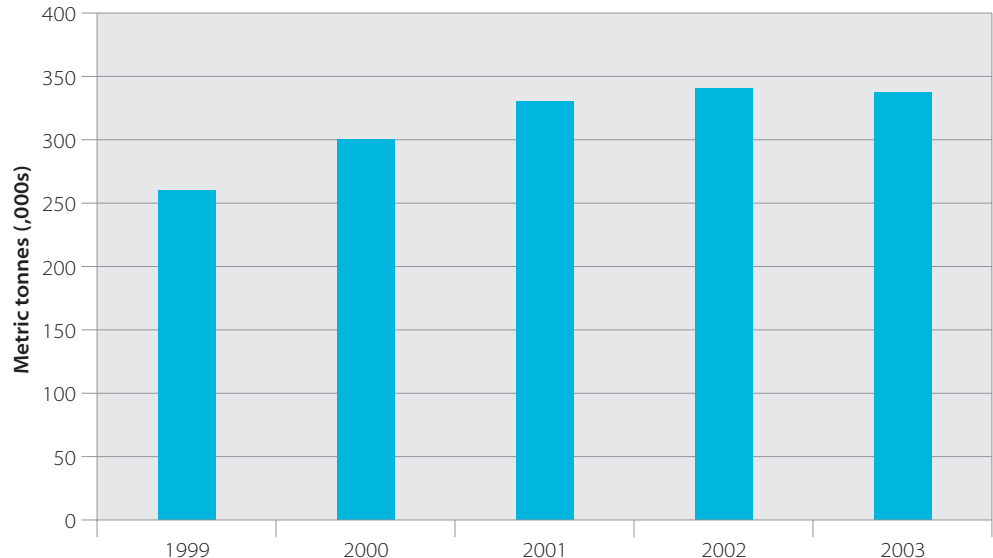


Figure 5: Volume of Hong Kong SAR total edible seafood imports 1999–2003



¹⁰ FAO statistics 2002

¹¹ Hong Kong SAR Census and Statistics database

¹² Using 1\$A = HK\$4.39

The total import figures significantly understate the amount of seafood, particularly live seafood, being traded in Hong Kong SAR. Locally licensed fishing vessels are exempt from making trade declarations required by the Hong Kong SAR Government, and they are not collected as part of trade statistics. In the case of live reef fish, it has been estimated that up to three times the recorded trade through Hong Kong SAR occurs¹³.

The Hong Kong dollar (HK\$) depreciated by more than 60 per cent against the Australian dollar (A\$) from 2001–2005, adding significantly to the cost that Hong Kong SAR importers and consumers pay for Australian seafood. The appreciation of the Australian dollar is the single most important contributing factor to the fall in the total value of Australian seafood exports over this period and makes the rise in the value of the Hong Kong SAR's seafood imports from Australia all the more outstanding.

The Hong Kong SAR offers a sophisticated seafood market characterised by:

- zero tariffs for imported seafood
- zero taxes on seafood imports, including value-added taxes (VAT)
- consistent strong demand for seafood, driven by domestic seafood consumption and the Hong Kong SAR's position as a major Asian re-export hub
- a stable seafood trading system, in which regulation, public health and sanitary rules and requirements are relatively consistent, transparent and reliable (see Chapter 3)
- limited bureaucratic hurdles
- a well-organised wholesale seafood market system, which the Hong Kong SAR Government oversees
- a well-developed and reliable banking system, through which suppliers get paid
- the use of the Hong Kong dollar as currency, which is pegged to the US dollar
- the use of English as an operating language.

In 2003, Hong Kong SAR edible seafood imports were dominated by shark fin (HK\$2.4 billion), abalone (HK\$1.4 billion), lobster (HK\$1.2 billion), live fish (HK\$1.1 billion) and prawns (HK\$1 billion). Together, these five products made up more than 53 per cent of total imports (see Figure 6). Other significant market segments included: scallops; fish — frozen (excluding fillets); fish — dried, smoked, meals and pellets; fish — fresh and chilled (excluding fillets); and fish fillets and other fish meat.

In 2003, pearls were the most valuable component of the Hong Kong SAR's non-edible seafood imports, accounting for more than 95 per cent (HK\$1.95 billion)¹⁴.

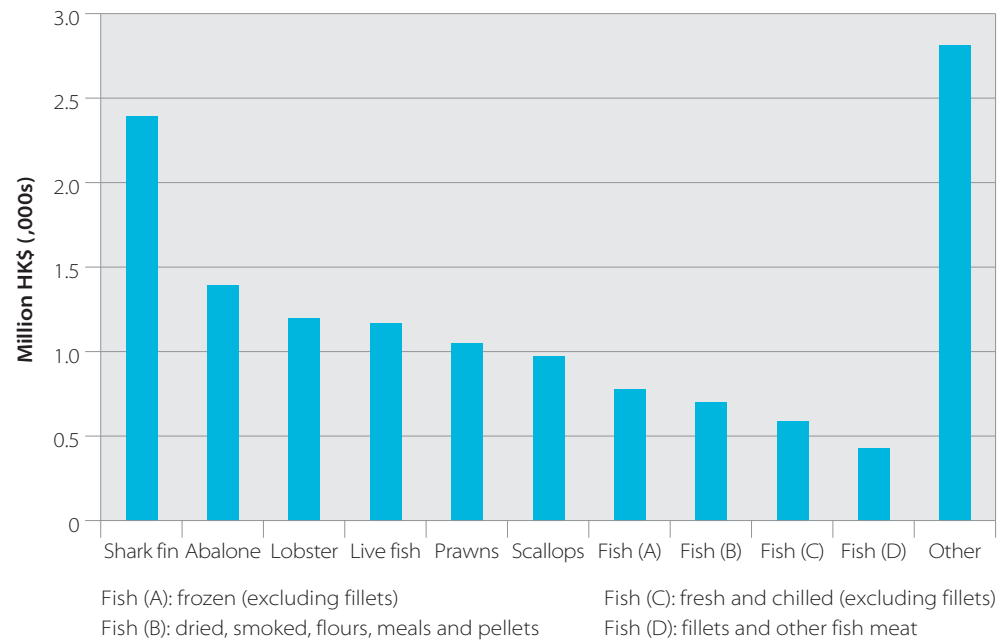
The Hong Kong dollar (HK\$) depreciated by more than 60 per cent against the Australian dollar (A\$) from 2001–2005, adding significantly to the cost that Hong Kong SAR importers and consumers pay for Australian seafood

13 The trade in live reef food fish: a Hong Kong SAR perspective, 2001

14 HK SAR Census and Statistics database

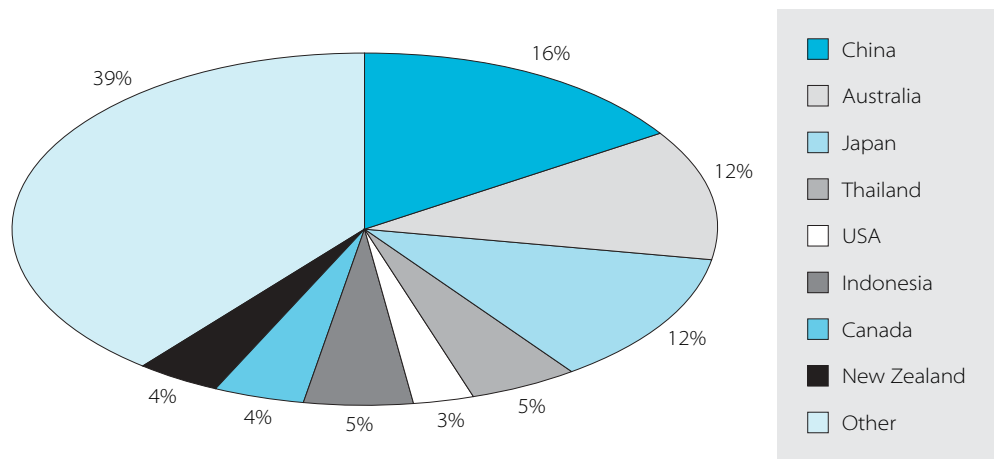
In 2003 Hong Kong SAR edible seafood exports totalled HK\$2.9 billion. Of this, domestically produced edible seafood exports were valued at HK\$84 million and re-exported product HK\$2.8 billion

Figure 6: Composition of total Hong Kong edible seafood imports 2003



In 2003, 131 countries exported edible seafood, valued at HK\$13.7 billion, to the Hong Kong SAR. The five top edible seafood exporters (value) were mainland China — 16 per cent, Australia — 12 per cent, Japan — 12 per cent, Thailand — 5 per cent and Indonesia — 5 per cent (see Figure 7)¹⁵.

Figure 7: Hong Kong SAR edible seafood imports, by country, 2003



In 2003 Hong Kong SAR edible seafood exports totalled HK\$2.9 billion. Of this, domestically produced edible seafood exports were valued at HK\$84 million and re-exported product HK\$2.8 billion. In 2003, non-edible seafood exports totalled HK\$2.3 billion, comprising domestically produced exports of HK\$27 million and re-exported product HK\$2.26 billion¹⁶.

15 HK SAR Census and Statistics database

16 HK SAR Census and Statistics database

The Hong Kong SAR domestic fishing industry

The Hong Kong SAR's fleet of about 4770 fishing vessels employs 10,860 fishers. In 2003, the fleet produced an estimated 159,500 Mt of seafood with at least 90 per cent caught outside Hong Kong SAR waters¹⁷. The most common form of fishing is trawling, which accounts for a vast majority of the domestic catch. Other types of fishing include longlining, gill netting, purse seining, hand lining and cage trapping.

In 2003, the value of aquaculture production was HK\$121 million (3800 Mt). It consisted mainly of pond fish culture and marine fish culture. Principal species produced include carp, tilapia, grouper and snapper.

As discussed earlier, total import figures significantly understate the amount of seafood traded in the Hong Kong SAR because locally licensed fishing vessels are exempt from making trade declarations required by the Hong Kong SAR Government, and are not collected as part of trade statistics.

Trends in Hong Kong SAR seafood imports 1999–2003

The major opportunity (and threat) for the Hong Kong SAR seafood market relate to its trading relationship with mainland China, as discussed in Chapter 2. With the development of closer economic ties between the Hong Kong SAR and mainland China, as demonstrated by 'The Mainland China and Hong Kong SAR Closer Economic Partnership Arrangement (CEPA)', both parties have signalled they intend to work cooperatively in developing freer trade between them. The relationship will underpin Hong Kong SAR's future as a hub for trade in the region.

As discussed previously, the volume of the Hong Kong SAR's edible seafood imports has increased by 23 per cent over the past five years, despite difficult trading conditions caused by a depreciating currency and the SARS epidemic in 2003. The value of edible seafood imports peaked during 2000 at HK\$15.1 billion, and fell to HK\$13.6 billion in 2003. Despite this fluctuation, the value of edible seafood imports is HK\$1.3 billion, or 10 per cent higher than in 1999 (see Figure 1).

From 1999 to 2003, seven of eleven broad seafood classifications experienced growth. The strongest gains were in the value of imported shark fin, abalone and 'other seafood' (see Figure 8). The value of imported lobsters, live fish and prawns decreased over this period.

The volume of the Hong Kong SAR's edible seafood imports has increased by 23 per cent over the past five years, despite difficult trading conditions caused by a depreciating currency and the SARS epidemic in 2003

17 HK Fishnet website

However, relatively less expensive seafood categories, including frozen fish (excluding fillets), fresh and chilled fish (excluding fillets), and fish fillets and other fish meal grew fastest in volume but not in value (see Figures 8 and 9). The volume of imported frozen fish (excluding fillets) increased, for example, by 140 per cent from 1999–2003 but only rose in value by 40 per cent. Similarly, the value of imported prawns fell by 22 per cent, but the volume of prawn imports rose by 15 per cent (see Figures 8 and 9). Much of this less-expensive product is sourced from mainland China as well as other developing economies. The Australian domestic seafood market has experienced similar reductions in unit prices for lower value species¹⁸.

Figure 8: Change in composition of Hong Kong SAR edible seafood imports, by value, 1999 and 2003

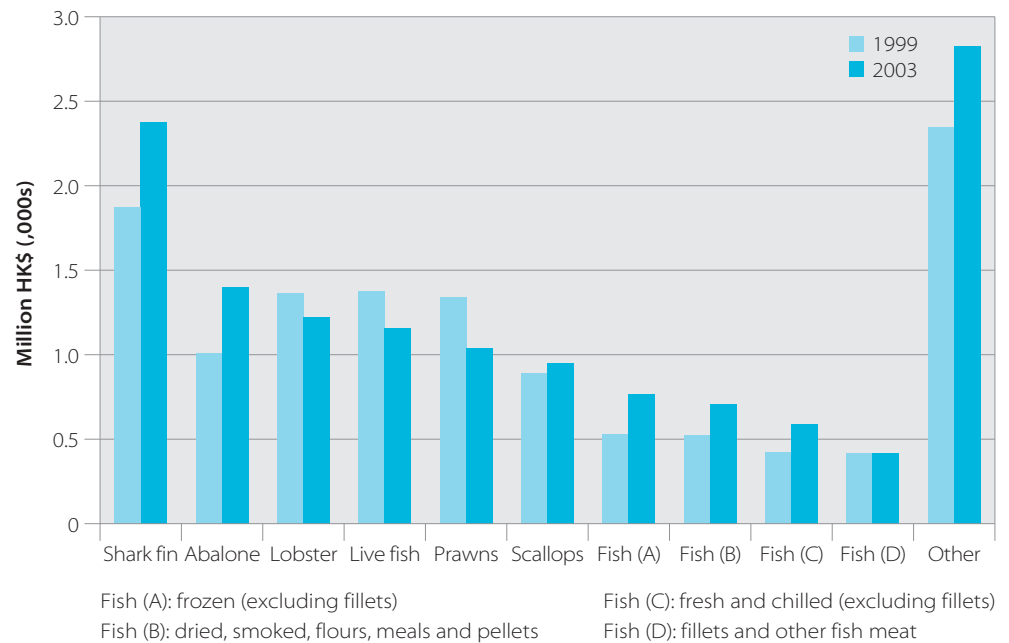
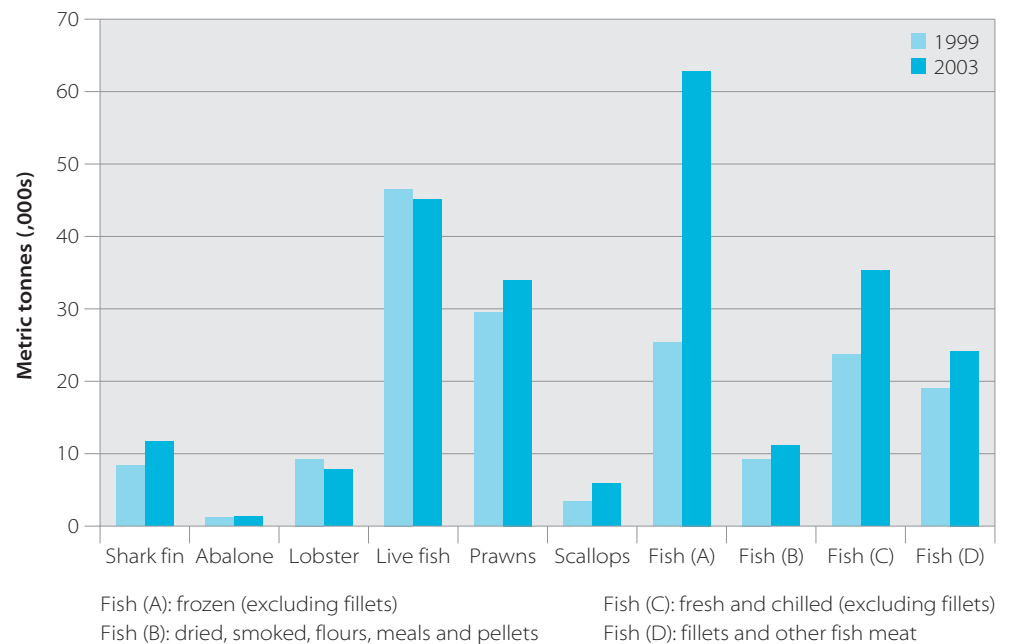


Figure 9: Change in composition of Hong Kong SAR edible seafood imports, by volume, 1999 and 2003



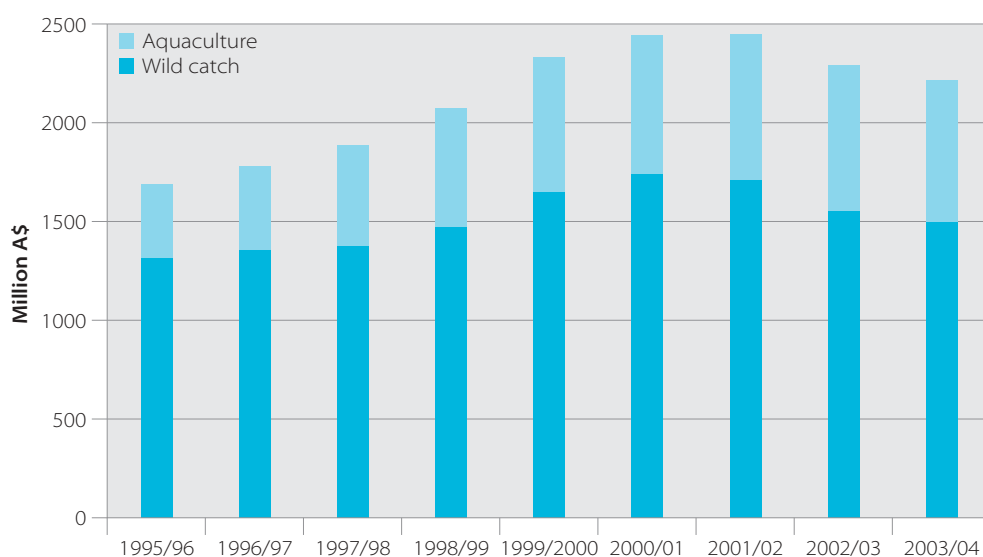
18 HK SAR Census and Statistics database

Australian seafood production

The gross value of seafood production fell in one year from A\$2.3 billion to A\$2.18 billion in 2003–04. The value of ‘wild caught’ seafood still dominates the Australian industry, accounting for A\$1.48 billion, or 68 per cent, of total seafood production. Aquaculture production contributed A\$731 million (see Figure 10).

However, the value of aquaculture production has risen by 91 per cent (A\$349 million) since 1995–96, compared with an increase of 14 per cent (A\$179 million) in the value of ‘wild caught’ seafood. The percentage value rise of aquaculture indicates a longer-term trend, suggesting the sector will provide the major impetus for medium to long-term growth in the value of Australia’s seafood production¹⁹.

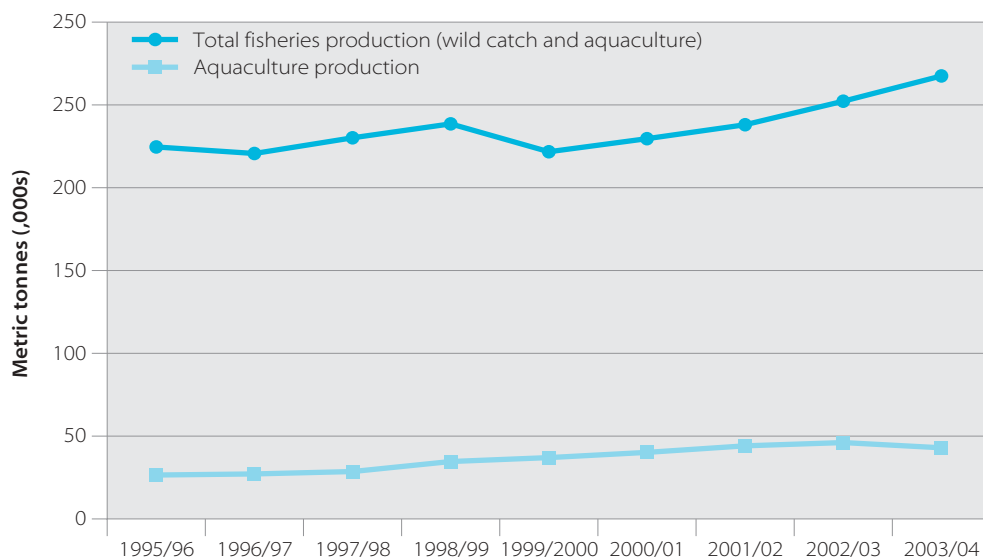
Figure 10: Gross value of Australian fisheries production 1995–96 to 2003–04



The gross value of seafood production fell in one year from A\$2.3 billion to A\$2.18 billion in 2003–04

Australia produced 266,613 Mt of seafood in 2003–04. Wild catch fisheries accounted for 223,138 Mt (84 per cent) and aquaculture 43,475 Mt (16 per cent). In the past five years, the volume of fisheries production has risen by 20 per cent, despite aquaculture volumes levelling out (see Figure 11).

Figure 11: Volume of Australian fisheries production 1995–96 to 2003–04



19 ABARE database

For a more comprehensive breakdown of Australian fisheries production, exports and imports by state and product, see ABARE's *Australian Fisheries Statistics, 2004*, available free from www.abareconomics.com, or contact the ABARE bookshop on 02 6272 2000.

Trade in Australian seafood products

Exports

Seafood exports totalled A\$1.65 billion in 2003–04, \$193 million down on the previous financial year. The fall was associated with soft world prices following on from the SARS epidemic that closed a number of key Asian seafood markets for several months in early 2003, lower Japanese exports, which fell by A\$129 million, and Australia's appreciating currency, which resulted in lower per unit prices (see Table 1).

Five products dominate Australian seafood exports: rock lobster (A\$426 million), pearls (A\$310 million), prawns (A\$160 million), tuna (A\$271 million) and abalone (A\$237 million). Together, they make up A\$1.4 billion, or 85 per cent, of total seafood exports²⁰.

Since the beginning of the 1990s, the destinations of Australian seafood exports have gradually diversified, although Australian exporters have always targeted a few preferred markets. In 1990–91, just over half of Australia's exports of seafood products went to Japan. During the 1990s, China, Chinese Taipei, the Hong Kong SAR and the United States became more important destinations for Australian product.

In 2003–04, the Hong Kong SAR, for the first time, replaced Japan as Australia's principal seafood export market (see Table 1). Other significant changes during the past five years have included:

- the fall in seafood exports to Japan in 2003–04, due to declining southern bluefin tuna, rock lobster and prawn exports
- the increase in importance of the US market for the consumption of high-value seafood, such as rock lobster and high-value fish species
- the EU, collectively, replacing Chinese Taipei as Australia's fourth most important seafood export market
- the fall in share of the Chinese Taipei market because of high levels of domestic protection and a preference to use the Hong Kong SAR as the gateway to China
- the growth of exports to the Chinese market (from a low base), which has seen them rise 31 per cent over the past two years, despite difficult trading conditions
- mainland China becoming the world's largest exporter of seafood, in terms of value.

Since the beginning of the 1990s, the destinations of Australian seafood exports have gradually diversified, although Australian exporters have always targeted a few preferred markets

²⁰ ABARE database

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

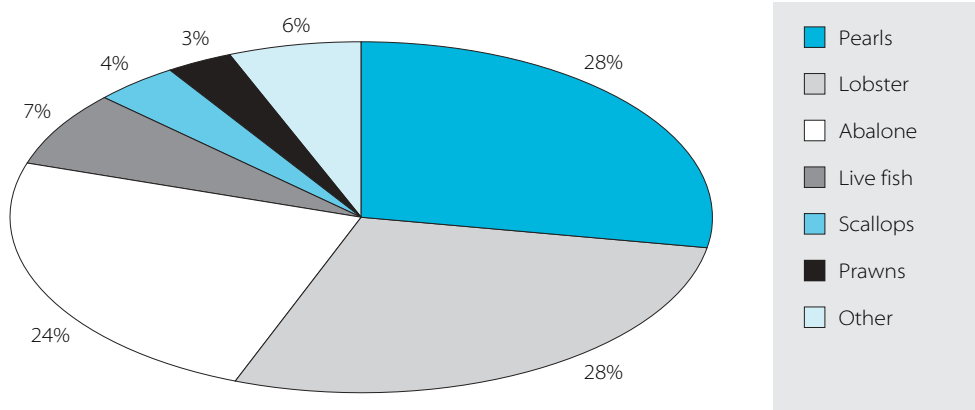
	1996–97	% of total	2002–03	% of total	2003–04	% of total
Hong Kong SAR	236,448	18	433,154	23	590,719	36
Japan	446,804	34	655,926	36	526,309	32
United States	75,982	6	198,619	11	154,904	9
EU *Expanded to 25 member states May 2004	23,040 EU 15	2	93,647 EU 15	5	92,306 EU 25	6
Chinese Taipei	216,864	17	92,682	5	75,965	5
China	53,267	4	74,482	4	69,651	4
Singapore	39,970	3	49,588	3	40,990	2
New Zealand	11,877	1	28,032	1	23,091	1
Other	200,620	15	218,305	11	77,953	5
Total	1,304,872	100	1,844,435	100	1,651,888	100

Australian seafood exports to Hong Kong SAR

In 2003–04 Australian seafood exports to the Hong Kong SAR totalled A\$590 million. Edible seafood exports contributed \$420 million (71 per cent) and non-edible \$170 million. This figure was \$112 million (23 per cent) higher than exports in 2002–03 (see Figure 13).

Australian seafood exports to the Hong Kong SAR were dominated by pearls — valued at \$170 million (29 per cent), lobster — \$165 million (28 per cent) and abalone — \$140 million (24 per cent) (see Figure 12). The three products accounted for 81 per cent of the total value of seafood exported by Australia to the Hong Kong SAR. Other significant seafood exports included live fish (\$39 million), scallops (\$26 million) and prawns (\$16 million).

Figure 12: Composition of Australian seafood exports to the Hong Kong SAR 2003–04, total value A\$590 million



Trends in Australian seafood exports to Hong Kong SAR 1999–2000 and 2003–04

As mentioned earlier, the Hong Kong SAR is Australia’s most important export destination. The value of Australian seafood exports rose by 51 per cent from 1999–2000 to 2003–04 to A\$590 million. Pearl and abalone exports accounted for much of the increase (see Figure 13).

The volume of Australian seafood exports to Hong Kong SAR increased by 23 per cent from 11,484 Mt in 1999–2000 to 14,078 Mt in 2003–04.

Of the major categories of seafood Australia exported to the Hong Kong SAR, the value of pearls, abalone, live fish and ‘other’ has increased since 1999–2000. Exports of lobster, scallops and shrimp, on the other hand, fell during the period.

From 1999–2000 to 2003–04, the value of annual pearl exports to the Hong Kong SAR has risen by A\$137 million (401 per cent) to A\$170 million and abalone exports by A\$50 million (55 per cent) to A\$140 million (see Figure 14).

the Hong Kong SAR is Australia’s most important export destination. The value of Australian seafood exports rose by 51 per cent from 1999–2000 to 2003–04 to A\$590 million

Figure 13: Australian seafood exports to Hong Kong SAR 1999–2000 to 2003–04²¹

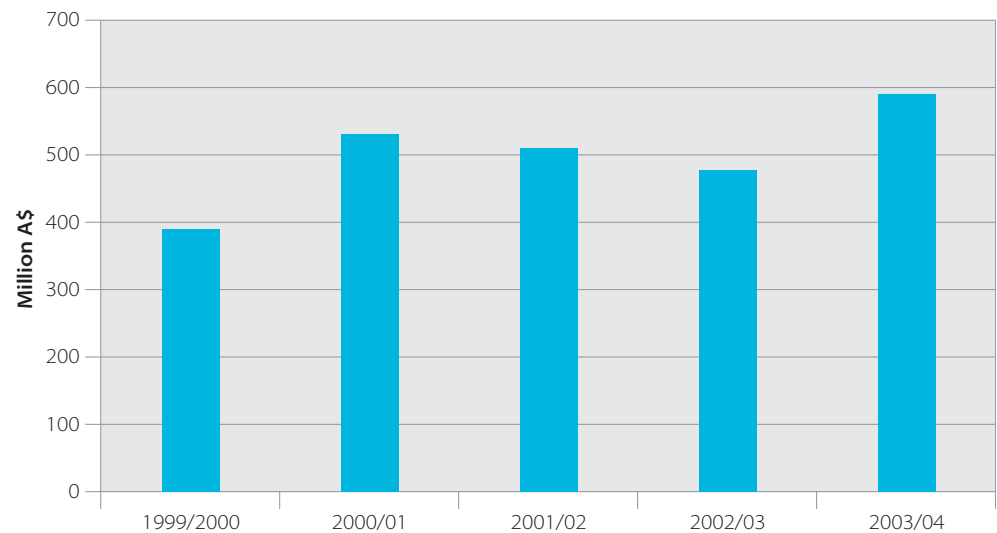
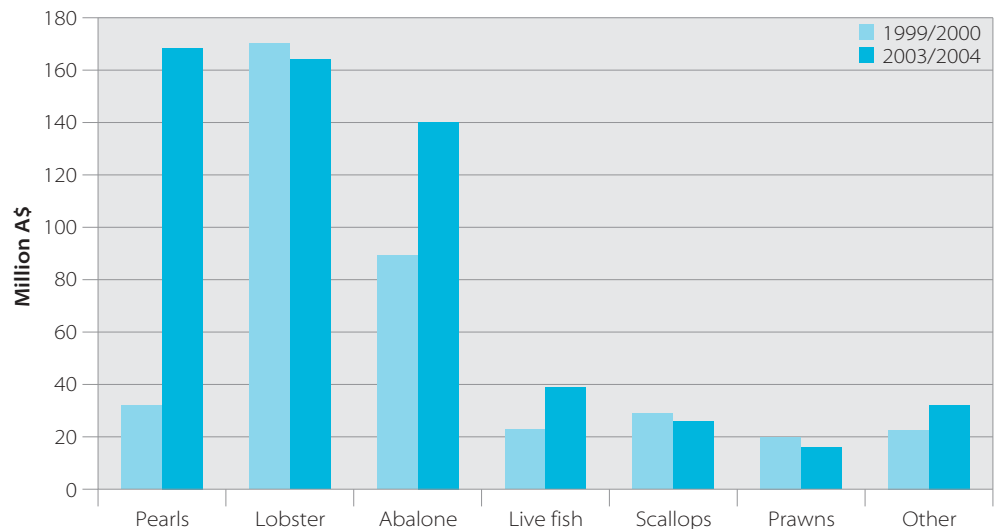


Figure 14: Change in the composition of Australian seafood exports to the Hong Kong SAR 1999–2000 and 2003–04²²



21 Nominal values

22 Nominal values

CHAPTER 2

The trading relationship between the Hong Kong SAR and mainland China

The creation of the Hong Kong Special Administrative Region (Hong Kong SAR)	18
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The creation of the Hong Kong Special Administrative Region (Hong Kong SAR)

On 1 July 1997, Hong Kong, including Hong Kong Island and the Kowloon Peninsula, reverted to Chinese sovereignty from Britain, resulting in the creation of the Hong Kong Special Administrative Region (Hong Kong SAR).

Under the policy of ‘One Country, Two Systems’, Hong Kong SAR enjoys a considerable degree of economic autonomy from mainland China, and continues to have its own taxation, legal system, currency, customs and immigration authorities. Only national defence and diplomatic relations are responsibilities of the central government in Beijing.

Seafood tariffs, value-added tax and consumption tax in the Hong Kong SAR and mainland China

Hong Kong SAR tariffs and taxes

The Hong Kong Special Administrative Region of the People’s Republic of China (PRC) is a free port and does not levy Customs tariffs on most imported goods, including all seafood imports. There is no tariff quota or surcharge. The Hong Kong SAR does not have value-added, general services or consumption taxes.

Mainland China tariffs and taxes

China has a two-tier system of taxation on imports. It levies a tariff on imports combined with a VAT (value-added tax). Mainland China also reserves the right to impose tariff quotas or a discretionary additional consumption tax on individual items.

The VAT is similar to Australia’s Goods and Services Tax (GST). The main differences are that it is levied at a variable rate of 13 per cent or 17 per cent, rather than the flat 10 per cent in Australia, and it is levied on imported seafood.

These taxes add significantly to the cost of doing business in mainland China. The tariff and VAT and any additional consumption taxes are collected at the Chinese port of entry, and can vary significantly between seafood products.

Examples of the current level of tax the PRC levies on select seafood imported from Australia include:

The Hong Kong SAR of the People’s Republic of China is a free port and does not levy Customs tariffs on most imported goods, including all seafood imports

Table 2: Mainland China tariffs and value-added tax

Mainland China	Tariff	VAT
Edible seafood		
Live fish	10–17.5%	13%
Lobster	10–15%	13–17%
Prawns	5–15%	13–17%
Abalone	10–22%	13–17%
Scallops	14%	13–17%
Tuna	0–12%	13–17%
Non-edible seafood		
Pearls	35%	13–17%

Appendix 1 provides a more comprehensive list of tariffs faced by Australian edible seafood exporters.

Tariff free trade in seafood between the Hong Kong SAR and mainland China

Trade in seafood between the Hong Kong SAR and mainland China

Mainland China is the world's largest exporter of seafood. The FAO estimated that, in 2002, mainland China exported about US\$4.4 billion of edible seafood.

The Hong Kong SAR and mainland China have always been strong trading partners, and trade in seafood is no exception. During 2003, mainland China exported edible seafood valued at HK\$2.1 billion to the Hong Kong SAR, and is its largest single source of edible seafood imports, accounting for 16 per cent of the total (see Figure 7)²³.

The Chinese mainland took more than HK\$1.8 billion (35 per cent) of Hong Kong SAR seafood exports in 2003, which were valued at HK\$5.2 billion. Hong Kong SAR seafood exports to China are made up almost entirely of re-exported product²⁴.

The mainland China and Hong Kong SAR Closer Economic Partnership Arrangement (CEPA)

The Closer Economic Partnership Arrangement (CEPA) adopts a gradual approach to trade liberalisation between mainland China and the Hong Kong SAR, and provides a mechanism for further liberalisation measures.

The purpose of the preferential tariff treatment is to stimulate Hong Kong SAR's processing and manufacturing industry, and encourage new investment from local and overseas investors in the region's manufacturing sector.

Mainland China is the world's largest exporter of seafood. The FAO estimated that, in 2002, mainland China exported about US\$4.4 billion of edible seafood

23 Hong Kong SAR Census and Statistics Department

24 Hong Kong SAR Census and Statistics Department

It is also intended to stop exported goods, including seafood, from being imported tariff free into Hong Kong SAR and then transhipped to mainland China without any further processing of the product, thus avoiding mainland China tariffs.

Under this mechanism, mainland China and the Hong Kong SAR have negotiated a list of 1087 individual products (57 of these relate to seafood products), by tariff code, that can be exported tariff free from the Hong Kong SAR to mainland China, following the registration and certification of Hong Kong-based companies (see below).

Appendix 2 contains a comprehensive list of tariff free seafood products covered under CEPA.

How Hong Kong SAR-based seafood companies qualify for tariff-free trade into mainland China

For legitimate tariff-free trade from the Hong Kong SAR to mainland China, seafood exporters must meet set criteria, including:

1. The goods to be exported must be on the agreed CEPA list of tariff-free product codes, as mentioned earlier.
2. The Hong Kong SAR-based/owned company exporting to mainland China must be registered with the Hong Kong SAR Trade and Industry Department.

This registration is intended to ensure that only Hong Kong-based/owned companies can legitimately export seafood product tariff free to mainland China.

Requirements for Factory Registration (FR)

To be considered as a registrable concern, the applicant must:

- have a self-contained place(s) of operation (which may be self-owned or rented) (for aquaculture fisheries: fixed pond/impoundment/fish raft/oyster bed; for capture fisheries: fishing vessel)
- have machinery/equipment installed or maintained in the place(s) of operation suitable for the production of the goods to be registered
- have a labour force employed or maintained by the applicant to produce the goods to be registered (the labour may be regular or casual workers on monthly, daily paid or piece-rate basis; self-employed is also acceptable)
- maintain adequate operational invoices and records
- name a responsible person with Hong Kong SAR personal identification and, where appropriate, be registered with the Business Registration Office of the Inland Revenue Department.

For fishing operations outside Hong Kong SAR waters, provision of a copy of a valid proof issued by the authority of the country/place where the vessel(s) was/were registered and/or permitted for fishing (e.g. licence/permits/documentation issued by the fisheries authority of the Central Government).

Normally, the licence should be in the name of the signatory, responsible person, director or owner of the company/business, otherwise please contact the CO(CEPA) Section or Customer Service Centre of Certification Branch for follow-up (contact details below).

A comprehensive guide to Factory Registration for Seafood and Aquaculture producers is available at:
http://www.tid.gov.hk/english/aboutus/publications/registcert/files/guidance_fish.pdf

Manufacturers can continue to use the Outward Processing Arrangement (OPA) to subcontract an outside Hong Kong subsidiary for minor finishing processes for goods intended for export to mainland China. After outward processing, the finished goods have to be returned to Hong Kong before applying for a CO(CEPA) for export under CEPA.

3. The Hong Kong SAR-based/owned company exporting to mainland China must obtain a Certificate of Hong Kong SAR Rules of Origin (CEPA ROO) in order to obtain tariff free status.

What is CEPA ROO?

Rules of Origin (ROO) are a set of rules setting out the criteria and standards for a product (in our case seafood) to claim itself of a particular 'country of origin', in this case Hong Kong SAR. This is important because unless a product can be shown to be of Hong Kong SAR origin it cannot be exported to mainland China tariff free.

To claim tariff preference under CEPA, Hong Kong and mainland China have agreed on a set of preferential CEPA Rules of Origin (CEPA ROO). A product must comply with the CEPA ROO to gain a CO(CEPA) certificate and be claimed as Hong Kong SAR-origin to enjoy zero tariff treatment when it is exported to mainland China.

What are the procedures for applying for CO(CEPA)?

To claim zero tariffs under CEPA, Hong Kong-origin products imported into mainland China must be supported by a CO(CEPA) certificate issued by the Hong Kong SAR Government Department of Trade and Industry Development (TID), or one of the five Government Approved Certification Organisations:

- a. The Hong Kong General Chamber of Commerce
- b. The Indian Chamber of Commerce, Hong Kong
- c. Federation of Hong Kong Industries
- d. The Chinese Manufacturers' Association of Hong Kong
- e. The Chinese General Chamber of Commerce.

Before applying for CO(CEPA), manufacturers must apply for Factory Registration (FR) with TID (see earlier) to demonstrate their factories possess sufficient capacity to produce the goods for export.

Rules of Origin are a set of rules setting out the criteria and standards for a product (in our case seafood) to claim itself of a particular 'country of origin', in this case Hong Kong SAR

Is outward processing allowed under CEPA?

Manufacturers can continue to make use of the Outward Processing Arrangement (OPA) to subcontract an outside Hong Kong subsidiary for minor finishing processes for goods intended for export to Mainland China. After outward processing, the finished goods have to be returned to Hong Kong before applying for a CO(CEPA) for export under CEPA.

The requirements for obtaining a Certificate of Hong Kong SAR Rules of Origin (CEPA ROO) are listed at:

http://www.tid.gov.hk/english/aboutus/faq/files/co_cepa.pdf

Inquiries

Should you have any inquiries about Factory Registration for Seafood and Aquaculture products or obtaining CO(CEPA), please contact:

The CO(CEPA) Section

Tel: +852 3403 6432 or

Customer Service Centre of Certification Branch

3/F, Trade and Industry

Department Tower, 700 Nathan Road, Kowloon

Hong Kong SAR Department Trade and Industry Department

Tel: +852 2398 5525

CHAPTER 3

Doing business with the Hong Kong SAR

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Introduction to doing business with the Hong Kong SAR

To export live or processed seafood products from Australia, the exporter must meet Australian regulations on public health, food safety and customs, as well as any requirements of the importing country, in this case Hong Kong SAR.

The principal Australian agencies that provide certification and clearance services for Australian exporters are the Australian Quarantine and Inspection Service (AQIS) and the Australian Customs Service (Customs).

AQIS has a dual role. It provides consumer protection and facilitates trade through 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 (see www.aqis.gov.au).

Customs regulations require all export goods needing an AQIS permit (i.e. all seafood exports) to be cleared through Customs before they can leave the country. This requires filing export documentation with Customs, which is explained later in this guide (details at www.customs.gov.au). In the case of the Hong Kong SAR, most Customs export clearances are raised electronically through the EXDOC/CUSTOMS Single Electronic Window (SEW), which is discussed in greater detail later in this chapter. The manual system for gaining Customs clearances, also described later in this chapter, is also available for seafood exporters but can be labour intensive and time consuming compared to the SEW system.

Australia has developed its export requirements in close consultation with industry partners, ensuring an appropriate level of regulation protects Australia's seafood industry. Seafood industry representatives meet regularly with government through the Seafood Export Consultative Committee (SECC) to discuss issues related to the export of seafood products (contact fish@aqis.gov.au or Paul Pavez 02 6272 3875 for more information). The SECC is the primary forum to discuss existing trade and issues associated with service delivery. The AQIS Technical Standards Branch is responsible for renegotiating or establishing new trade based on changed import/quarantine requirements.

To export processed foods from Australia, an exporter must meet the requirements of the *Export Control Act 1982*, the Prescribed Goods (General) Orders and the new Export Control (Prescribed Goods – General) Orders 2005 (EC(PGG)O), the Export Control (Processed Food) Orders and the new Export Control (Dairy, Eggs and Fish) Orders 2005 (EC(DEF)Os) and associated legislation, and must also provide documentation to Customs before disembarkation. The Act and EC(PGG)O set out common conditions for the export of all goods prescribed under the Act (e.g. dairy, meat, fish, eggs and grains). The EC(DEF)Os set out minimum standards for exporting seafood, dairy, eggs and their products.

To comply with Australian and Hong Kong SAR regulations, a seafood exporter must meet Australian requirements for export and Hong Kong SAR requirements for import (discussed in detail later in this chapter).

The principal Australian agencies that provide certification and clearance services for Australian exporters are the Australian Quarantine and Inspection Service and the Australian Customs Service

Are you ready to export?

For businesses that want to assess their ability and readiness to export, there are several services available, including those offered by the AQIS, Australian Trade Commission (Austrade) and the Australian Institute of Export.

Australian Quarantine and Inspection Service (AQIS)

AQIS Export Facilitation Program for Fish

www.aqis.gov.au/export/exportfacilitation

AQIS operates an Export Facilitation Program. The program assists existing and potential exporters of agricultural and fisheries commodities, in line with Australian and importing country requirements.

As part of the program, AQIS export facilitators provide free information on the following topics: other countries' import conditions, where known; legislative requirements for export; general quality assurance arrangements; premises' registration requirements; inspection procedures; AQIS fees and charges; documentation; and advice for exporters experiencing difficulties with government health documentation or other quarantine requirements.

AQIS export facilitators provide general export information but, for detailed assistance, you should deal with officers from the AQIS Fish Exports Program.

AQIS Export Facilitation Officers

New South Wales

Tel: 02 8838 3103

Fax: 02 9630 4650

E-mail: nswexport@aqis.gov.au

Victoria/Tasmania

Tel: 03 8318 6754

Fax: 03 8318 6748

E-mail: victaexport@aqis.gov.au

Queensland

Tel: 07 3246 8709

Fax: 07 3246 8652

E-mail: qldexport@aqis.gov.au

Western Australia

Tel: 08 9311 5437

Fax: 08 9311 5466

E-mail: waexport@aqis.gov.au

South Australia/Northern Territory

Tel: 08 8305 9713

Fax: 08 8305 9824

E-mail: santexport@aqis.gov.au

Internet:

www.aqis.gov.au/export/exportfacilitation

AQIS Fish Exports Program

www.daff.gov.au (Quarantine and Export Services) (Export) (Exporting fish and fish products)

The Fish Exports Program provides operational policy and technical advice to the seafood export industry to help it maintain market access through competent inspection staff and quality assurance-based inspection systems.

For businesses that want to assess their ability and readiness to export, there are several services available, including those offered by the AQIS, Australian Trade Commission and the Australian Institute of Export

The program's functions include:

- inspecting and approving registration of establishments' eligibility to export fish and/or eggs
- auditing food safety plans (AA, FPA or AQA systems to be discussed later in this chapter), based on a Hazard Analysis and Critical Control Points (HACCP) management system
- issuing export permits
- issuing health certificates (necessary for the importing country to accept the exported commodity).

Tel: 02 6272 5141

Fax: 02 6272 3682

E-mail: cileen.gosling@aqis.gov.au

AQIS Technical Standards Branch

www.aqis.gov.au (Quarantine and Export Services) (Export) (Exporting Food)

For seafood exports, the Technical Standards Branch:

- negotiates with importing country authorities to gain, maintain or improve access for new seafood products to existing overseas markets and access for Australian seafood, generally, to new overseas markets
- negotiates certification for seafood exports, if certification is required
- develops programs for, and hosts, inspection visits of the seafood export sector conducted by importing country authorities
- liaises with overseas authorities on general issues/inquiries
- participates in international forums, such as Codex Alimentarius (Codex)
- develops policy and provides technical support for operational programs
- audits shellfish food safety programs administered by (Australian) state government authorities.

Tel: 02 6261 6537

Fax: 02 6271 6522

E-mail: mark.kelly@aqis.gov.au

AQIS Regional Offices: AQIS Commodity Inspectors

www.aqis.gov.au

Senior export food inspectors in the regional offices will assist with registrations of export establishments; approval of HACCP-based systems; auditing of export-registered operations in line with Australian legislation and overseas country requirements; issue export documentation; issue invoices; and provide general information.

Western Australia — Perth
Senior Export Food Inspector
Greg Waller
Tel: 08 9334 1572
Fax: 08 9334 1668
E-mail: greg.waller@aqis.gov.au

South Australia — Adelaide
Senior Export Food Inspector
John Oliver
Tel: 08 8305 9741
Fax: 08 8305 9824
E-mail: john.oliver@aqis.gov.au

Queensland — Brisbane
Senior Export Food Inspector
Brian Johnston
Tel: 07 3246 8746
Fax: 07 3246 8792
E-mail: brian.johnston@aqis.gov.au

Queensland — Cairns
Senior Export Food Inspector
Terry Montgomery
Tel: 07 4030 7831
Fax: 07 4034 9080
E-mail: terry.montgomery@aqis.gov.au

New South Wales — Sydney
Senior Export Food Inspector
Sue Smith
Tel: 02 8334 7488
Fax: 02 8344 7480
E-mail: sue.smith@aqis.gov.au

Victoria — Melbourne
Senior Export Food Inspector
Ed Lewellin
Tel: 03 8318 6752
Fax: 08 8318 6748
E-mail: ed.lewellin@aqis.gov.au

Tasmania — Hobart
Senior Export Food Inspector
Tel: 03 6233 2502
Fax: 03 6233 2552

Northern Territory — Darwin
Senior Export Food Inspector
Michael Greenhalgh
Tel: 08 8999 2063
Fax: 08 8999 2108
E-mail: michael.greenhalgh@aqis.gov.au

AQIS Documentation and Registration Section

www.aqis.gov.au

The AQIS Documentation and Registration Section manages the Export Establishment Registration System (ER).

The section's functions in relation to export-registered establishments include:

- registration of all recommended export fish processing and live fish export plants and vessels
- administration of all establishment details in ER, including registrations, deregistrations, assignment of registrations and amendments to registered operations, overseas listings and/or people in management and control.

Barbara Hiscock
Tel: 02 6272 5637
Fax: 02 6272 5614
E-mail: exportestablishmentregistration@aqis.gov.au

Australian Trade Commission (Austrade) — Services and Export Capability Tool

www.austrade.gov.au

Austrade offers both free and fixed charge services to help small and medium exporters develop their businesses overseas and make their first export sales. The services for new exporters provide eligible businesses with practical assistance to develop their businesses into successful exporting companies. They include advisory services, an online ‘export capability’ tool, the New Exporter Development Program (NEDP) and TradeStart (see Australian Trade Commission (Austrade) in Chapter 5).

Austrade Advisory Service

The Austrade Advisory Service telephone number (13 28 78) is the first point of contact for businesses interested in exporting. Austrade’s role is to help Australian companies win overseas business for their products and services by reducing the time, cost and risk involved in selecting, entering and developing international markets. Businesses should approach Austrade and AQIS at the same time.

Austrade ‘export capability’ tool

Austrade’s ‘export capability’ tool can show you the key capabilities necessary, in relation to aptitude and attitude, which can contribute to your company’s successful entry into export. The export capability tool can be found at www.austrade.gov.au/australia/layout/

The New Exporter Development Program (NEDP)

The New Exporter Development Program gives Australian businesses the best possible start to exporting, by providing a wide range of free services to new exporters including advice and information about getting into exporting, export coaching, and assistance on the ground in foreign markets.

Austrade TradeStart

Austrade’s TradeStart program is a national network of export assistance officers in partnership with local and private sector organisations throughout Australia. The program gives Australian businesses the best possible start to exporting by providing a wide range of free services, including advice and information about getting into exporting, export coaching and assistance on-the-ground in foreign markets. Further information about the TradeStart program is available at www.austrade.gov.au/australia/layout/

Austrade offers both free and fixed charge services to help small and medium exporters develop their businesses overseas and make their first export sales

The Australian Institute of Export — Export Awareness and Readiness Test

www.aiex.com.au

The Australian Institute of Export provides practical export education in several disciplines, including Export Procedures and Documentation, Finance and Foreign Exchange Management, and International Marketing and Trade Law.

The Institute also publishes several useful publications, including the *Export Handbook* (592 pages). The *Export Handbook* provides a practical test of export awareness and readiness. It covers export practice from the point where an export order is received, as a result of negotiations by marketing personnel. The handbook explains various essential procedures to place goods on a ship or aircraft, and to prepare the necessary export documentation. Some of the key aspects of exporting procedures covered include: Customs export regulations, banking and finance, managing risk, air cargo and export packaging.

Further information about the *Export Handbook* and other publications produced by the Australian Institute of Export are available at www.aiex.com.au

Hong Kong SAR business practices and customs

You must be familiar with China's culture, politics, business and social practices to achieve commercial success.

Although the Hong Kong SAR is a modern western society, Hong Kong Chinese adhere to their traditional business practices and customs. This has a profound effect upon the way business is conducted and business relationships developed, and should not be taken lightly.

The following are some business tips for conducting business in China. They are in no way exhaustive and should be used as a general guide only. Further information about business practices and customs can be obtained from Austrade's office in the Hong Kong SAR (see Australian Government Contacts in Hong Kong SAR, Chapter 4).

Language: The prevailing spoken language is Cantonese, followed closely by English. Many locals also understand and use Mandarin.

Business cards: Business cards are essential. Use both hands when presenting cards and be sure the writing faces the person to whom you are presenting your card. It is polite to receive the card with both hands and read it before putting the card in a pocket or bag.

Establishing contacts and networks: Exporters should send as much documented information about their companies, products and services as possible before they arrive. Potential exporters should contact Austrade Hong Kong SAR to arrange business introductions and in-country visits (see Australian Government Contacts in Hong Kong SAR, Chapter 4).

Although the
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In-country agent or representative: The quality of your agent or representative's contacts is crucial, and business introductions are vital, as companies do not deal with unknown or unrecommended contacts.

The Chinese place importance on punctuality and Australian visitors should avoid arriving late for appointments. Itineraries should take this into consideration and allow adequate time to move from one appointment to the next.

Forms of address: Many Hong Kong SAR business people will have an English first name, used with a Chinese family name, e.g. Peter Chan. In this case, the family name is used last, as in Australia. Normally, when a Chinese name is written, the family name comes first, with the given name following, e.g. Mr Chan Tai-Man would be addressed as Mr Chan. When addressing business correspondence to Hong Kong, all names should be written in full, with titles included.

Correspondence: Answer inquiries, proposals, correspondence and invitations as soon as possible. At the least, send an acknowledgement immediately advising an answer will follow shortly. If you do not show sufficient interest and speed in your correspondence, your potential customer will lose interest.

Business entertainment: You should never underestimate the importance of eating in Chinese culture. Many important relationships are developed at Chinese banquets. It is polite to sample every dish served. Seating should be arranged so that the Australians are spaced evenly with the Chinese guests.

Face: Avoid embarrassing Chinese in the presence of others. To avoid the person losing face, discuss any criticisms in private. In some cases, it may be helpful to use an intermediary to convey criticism, particularly with someone of high social status.

Gifts: The exchange of gifts is not widely practiced in business in the Hong Kong SAR. However, gifts should be graciously accepted. Acceptable gifts to give include fruit and objects such as coins, stamps and coffee table books that are unavailable in the Hong Kong SAR. Red means happiness and gold means wealth, so both colours are appropriate for gift-wrapping. It is not common practice to open a gift in the presence of the giver.

Business hours in Hong Kong SAR

- Government offices, most European firms and the larger Chinese business houses are open Monday to Friday, 9.00am–5.00pm, with an hour for lunch, and Saturday 9.00am–1.00pm.
- Many Chinese businesses open from 9.00am–6.00pm or later, Monday to Saturday.
- Major department stores open from 10.30am–10.00pm, Monday to Sunday.
- Many Chinese shops keep extended hours, opening from 10.00am–10.00pm daily.
- Most banks are open from 9.00am–4.30pm, Monday to Friday, and Saturday 9.00am–12.30pm.

Australian export requirements

1. Register your export establishment with AQIS

To comply with the requirements:

- All seafood must be produced, processed and stored in an establishment registered for export by AQIS.
- Fishing vessels that freeze, pack or process seafood in any way must be registered for export with AQIS.
- Fishing vessels, which are catch-only vessels (i.e. vessels that only chill product), are not required to be registered for export with AQIS.
- All land-based handling, processing and storage establishments must be registered for export with AQIS.

AQIS export establishment registration process

The following steps provide a summary of what is involved in the AQIS export establishment registration process:

- Initially, the exporter should contact their export facilitation officer or their state or territory AQIS Fish Exports Program inspectors (see AQIS contacts earlier in this chapter).
- The exporter completes a form, EX26 — *Application for Registration or Notification to the Secretary of Change of Details of an Establishment* and submits this, with the application fee and plans, to the AQIS regional office.
- A Fish Exports Program officer will examine the plans. When the establishment is considered to have reached the AQIS standard, an inspection of the establishment is conducted.
- The application also undergoes an accounts and compliance check to ensure the persons managing the establishment are 'fit and proper'.
- The application is forwarded to AQIS Documentation and Registration Section for checking and approval.
- Once approved, the occupier is provided with a registration certificate and number that must be displayed in the establishment. Exports cannot begin until the exporter receives notification of approval from AQIS (and has an approved food safety inspection system (see below) and meets Hong Kong SAR import requirements).
- The registered export establishment will be reviewed against the food safety inspection system employed.

2. Ensure your export establishment complies with an approved system of inspection

Before registering an export establishment, AQIS must approve a food safety inspection system that meets the Australian Export Control (Dairy, Eggs and Fish) Orders, 2005.

The inspection system ensures export foods are safe, wholesome and accurately described to protect Australia's trading reputation. Inspection also ensures they meet overseas market requirements and international obligations, treaties and conditions. 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.

To ensure Australian seafood exporters can gain access to the Hong Kong SAR markets, AQIS is in the process of implementing a new Approved Arrangement (AA) food safety inspection system. All new applications for food safety inspection systems will be required to comply with the new Approved Arrangement (AA) system.

Within the next two years AQIS will phase out the two Quality Assurance (QA)-based inspection systems that are currently in use, the FPA (Food Processing Accreditation) and AQA (Approved Quality Assurance). Companies employing these QA systems will need to comply with the new AA inspection system.

Under the new Approved Arrangement (AA) inspection system, companies are required to formulate food safety plans that cover the seven steps of Hazard Analysis Critical Control Point (HACCP). These food safety plans will need to be validated to see that the system in place has the ability to produce safe food before implementation of the plan. After this, the plans would need to be verified to see that the plan is working. AQIS will verify the food safety plan at audit and rate the establishment on the findings as well as taking into consideration the risk level of the product being produced.

The Hong Kong SAR requires all seafood imports to be managed under a documented food safety plan that adheres to 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' fish export inspectors based in regional offices (see contact details earlier in this chapter).

The compliance and integrity of the AQIS-approved AA food safety management system is verified by regular auditing. The number and frequency of follow up audits are determined by perceived risks of the product category, previous compliance history and compliance with documented procedures at audit.

AQIS services are cost recovered and a list of charges is available from your local regional office or from the AQIS website at www.aqis.gov.au

3. Gain export certification documentation from AQIS, using EXDOC, to satisfy Hong Kong SAR requirements

Importing government certification requirements for seafood differ from country to country, and are subject to change at the importing government's discretion. Seafood exports often require certification and this is the case with the Hong Kong SAR. Australia's recognised certification body is AQIS. AQIS can supply certificates, but industry must implement the testing procedures to meet the importing government's requirements. AQIS can provide details of the requirements.

All seafood products exported to the Hong Kong SAR must have an Export Health Certificate. This certifies the seafood products to be exported have been subject to an AQIS-audited food safety inspection system that incorporates HACCP to control food safety hazards.

A system of export certification documentation, EXDOC (AQIS Electronic Export Documentation System), has been introduced for all seafood exporters to streamline the documentation process. EXDOC and the Single Electronic Window (SEW) to obtain Customs clearance must be used for all exports to the Hong Kong SAR. Alternatively customs clearance can be obtained using the manual documentation system as described later in the text.

What is EXDOC?

EXDOC is the AQIS Electronic Export Documentation System. Its purpose is to electronically process and produce the government-to-government documentation required to export Prescribed Goods. All of Australia's trading partners accept EXDOC, which has been generating government-to-government documentation since 1992. Full EXDOC functionality is available for dairy, fish, meat, grain and horticulture exports.

The system allows an exporter to apply electronically, using a commercial interface software package instead of the paper EX28 or EX222 (Notice of Intention to export (NOI)) forms. The electronic process automatically generates the Sanitary or Phytosanitary Certificate (e.g. EX345, E16, E171) importing authorities require. There are many advantages in having access to a central computerised system, including improved timeliness, standardised editing and business rule interpretation, and an improvement in nationwide consistency.

EXDOC replicates the manual process and operates under the legislative requirements of the *Export Control Act 1982* and its Orders and Regulations for exporting prescribed goods. The system electronically links the various categories of users, i.e. exporters, packers, AQIS documentation staff, AQIS inspection staff, AQIS veterinarians, Australian Customs Service, statutory authorities (e.g. the Australian Dairy Corporation) and the Australian Bureau of Statistics (through Customs). From the single entry of data, all the above may have their respective requirements satisfied without intervention by system users.

Importing
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EXDOC is the AQIS
Electronic Export
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System

However, certification requirements differ for some selected seafood products. These products may need to comply with additional Hong Kong SAR regulations, and others are banned from entering the Hong Kong SAR. The regulations and restrictions are discussed later in this chapter.

For further information, contact AQIS EXDOC (see AQIS contacts or www.aqis.gov.au (Export) (EXDOC)).

4. Gain an export permit for Australian Customs clearance through the EXDOC/Customs single electronic window (SEW) or through the manual customs clearance system

AQIS must grant an export permit before prescribed goods can be exported. The exporter must also obtain customs clearance through the Australian Customs Service. Customs clearance (an Export Declaration Number (EDN)) is required from the Customs Integrated Cargo Management System (ICS) before the product is exported.

All export goods needing a permit must have a Customs export entry, regardless of the consignment's value.

Registered users may lodge export clearance entries electronically through:

- the ICS system, which provides a 24-hour service that transmits a clearance for goods within 10 minutes, provided the mandatory requirements are met and no regulatory hurdle is encountered, or
- manually at the Exports Section of a Customs office during normal business hours, Monday to Friday. Customs aims to clear them by close of business next working day, provided they meet mandatory requirements and no regulatory hurdle is encountered.

You can contact the Customs Information Centre by telephone on 1300 363 263. Further information is available at www.customs.gov.au or through *The Customs Guide to Importing and Exporting*.

www.customs.gov.au/resources/webdata/resources/files/guideimport_export/.pdf

Combining export certification (AQIS) and export clearance (Customs) through the EXDOC/CUSTOMS — Single Electronic Window (SEW)

The EXDOC/CUSTOMS SEW streamlines the export process by providing a single data entry point to obtain export certification (AQIS) and export clearance (Customs) for individual seafood consignments.

How to apply for SEW

To use the SEW process, an exporter must first register as an exporter with EXDOC (AQIS). Canberra help desk on 02 6272 5773, or e-mail: exdoc.helpdesk@aqis.gov.au

A guide to using the SEW system is available at: www.aqis.gov.au (Export) (EXDOC)

Hong Kong SAR seafood import requirements

5. Meet Customs requirements

Customs clearance

The Customs and Excise Department Hong Kong SAR control on imported goods is done through inspection of documents such as manifests and, where necessary, physical examination of the goods. Physical examination is conducted selectively. Customs Officers detain selected consignments for physical examination.

Required documentation for Customs clearance of commercial consignments includes:

- Air waybill or bill of lading.
- Manifest, commercial invoice, packing list, shipper's catalogue.
- Other documents, such as the import license, removal permit, etc., depending on the cargo's final disposition.

Customs clearance is available at the airport through the consignee, and is available 24 hours a day. There are no restrictions on, or charges for, consignment clearances.

If a consignment of goods is selected for Customs examination, the importer or representative can approach the air cargo carrier or freight forwarder concerned for advice on Customs clearance procedures. Alternatively, direct inquiries can be made with the Customs Headquarters, which will provide contact information on the Customs Office at the airport.

Contact

Customs & Excise Department Headquarters
9/F, Harbour Building
38 Pier Road
Central, Hong Kong SAR
Customs Duty Controller
Tel: +852 2852 3185
Fax: +852 2542 3334

Storage charges

For imports, the first 48-hour period is free, starting at 02.00 hours on the day after the day of arrival. This free period does not include Sundays or public holidays. Subsequent 24-hour periods (including Sundays and public holidays) or part thereof attract a charge per kilo/per day. Cold storage facilities are available at Customs.

The Customs and Excise Department Hong Kong SAR control on imported goods is done through inspection of documents such as manifests and, where necessary, physical examination of the goods

Import/export declarations

Under the Import and Export (Registration) Regulations, Chapter 60 of the Laws of the Hong Kong SAR, every person who imports or exports any article — other than an exempted article — must lodge with the Commissioner of Customs and Excise an accurate and complete import/export declaration and pay the necessary declaration charges within 14 days after the article's import/export. The import/export declarations lodged by importers and exporters are primarily used by the Census and Statistics Department to compile statistics.

The Hong Kong SAR uses the Harmonised Commodity Description and Coding System (HS). Since there are no duties or tariffs on most products, it uses the system to help make international comparisons.

On receipt of the import/export declarations, the Customs and Excise Department transfers them to the Census and Statistics Department for analysis, compliance and statistical purposes. To enable work to proceed effectively, the Commissioner of Customs and Excise has authorised specific officers of the Census and Statistics Department to enforce the regulations on import/export declarations.

Methods for lodging import/export declarations

www.info.gov.hk/censtatd

Import and Export Declaration Forms can be lodged using the following methods:

- Import and export declarations should be submitted on appropriate forms (Import Declaration Form 1A, for imports of food items only; Export/Re-export Declaration Form 2) or on diskette in specified format.
- Import declarations can be submitted electronically through the Electronic Data Interchange-Trade Declaration System (EDI-TDEC System).
- Import/export declarations can be lodged in person at the following offices with the imports and exports declaration charge paid by cash or crossed cheque made out to: The Government of the Hong Kong Special Administrative Region:

Customs and Excise Department Collection Office (Kowloon)
G/F, Middle Road Multi-Storey Car Park Building
Tsimshatsui
Kowloon
Tel: +852 2311 3035

Customs and Excise Department Collections Office (Hong Kong)
2/F, Harbour Building
38 Pier Road, Central
Hong Kong SAR
Tel: +852 2852 3048

Any food, intended for sale in the Hong Kong SAR, whether imported or locally produced, must comply with the local food laws

Exempted articles

Exempted articles (that apply to fish and seafood products), as stipulated in regulation 3 of the Import and Export (Registration) Regulations:

- Transshipment cargo.
- Transit cargo.
- Articles imported or exported by the Government or the armed forces.
- Marine fish, including edible crustaceans, molluscs and other similar edible products derived from the sea, arriving in Hong Kong SAR direct from fishing grounds on fishing craft registered or licensed in the Hong Kong SAR.
- Any article, which:
 - consists solely of, and, is marked clearly as, a sample of any product and is intended, to the Commissioner's satisfaction, to be distributed free of charge to advertise the article of which it is a sample
 - is valued at less than HK\$1000, which consists solely of a sample of any product and is intended, to the Commissioner's satisfaction, to be used for the purpose to advertise article of which it is a sample
 - is imported solely for exhibition and is intended, to the Commissioner's satisfaction, to be exported after exhibition and is neither sold nor disposed of in any other way in the Hong Kong SAR
 - is exported solely for exhibition and is intended, to the Commissioner's satisfaction to be imported after the exhibition
 - is imported after having been exported for exhibition in accordance with subparagraph (iv)
 - is imported or exported under, and in accordance, with an ATA Carnet.

Further inquiries on procedures can be addressed to the Trade Statistics Branch of the Census and Statistics Department, Wanchai Tower, 12 Harbour Road, Wanchai, Hong Kong SAR, Tel: +852 2877 1818, Fax: +852 2824 2782.

6. Meet health requirements

Any food, intended for sale in the Hong Kong SAR, whether imported or locally produced, must comply with the local food laws. The importation of fish and seafood into the Hong Kong SAR is governed by the Food and Drugs section of the Public Health and Municipal Services Ordinance Cap. 132 and its subsidiary legislation, which is enforced by the Food and Environmental Hygiene Department.

Countries exporting food products to the Hong Kong SAR are expected to grow, harvest and process food according to the Code of Hygienic Practice recommended by the Codex Alimentarius Commission of the Food and Agriculture Organization of the United Nations, World Health Organization or other good manufacturing or agricultural practice of recognised standards as appropriate. The Food and Environmental Hygiene Department suggests using HACCP procedures to produce all food products.

To ensure the quality and wholesomeness of the food, competent authorities of the country of origin, in Australia's case, AQIS, are requested to issue health certificates for their products for export to the Hong Kong SAR.

Health certificates

While not always requested by relevant Hong Kong SAR authorities, it is prudent for a Health Certificate to accompany fish and seafood imported into the Hong Kong SAR. The Health Certificate requested by the Hong Kong SAR's governmental authorities should include the following information:

- **Health certification to be made by the competent authority in the country of origin, in Australia's case, AQIS, and should contain the following information:**
 - The (name of imported food product) is processed and packed under hygienic conditions.
 - The (name of imported food product) is fit for human consumption and can be sold as food for human consumption in (name of country of origin).
 - Marine products to be consumed raw (e.g. sushi and sashimi) requires an additional statement 'fit for human consumption in the raw state'.
- For marine products from cholera-infected places, the following additional certification is also required:
 - The marine product has not been collected from areas where any cholera case has been reported.
 - The marine product has been found to be free from the infection of cholera vibrios.

Health certificate for raw bivalve molluscs (i.e. oysters, scallops etc) for human consumption:

- **Health certification by the competent health authority of the country of origin should include the following information:**
 - The bivalve molluscs were collected or harvested from sanitary waters, which have not been polluted; or the molluscs have been cleansed by relaying in clean water for (state number) days or the molluscs have been cleansed in the approved shellfish purification plant at (address of plant).
 - The molluscs were packed under hygienic conditions.
 - The molluscs do not contain any substance or substances, including biotoxins, contaminants like pesticides, trace metals, etc. in such amount as to be poisonous, harmful or injurious to health.
 - The molluscs are fit for human consumption and can be sold as food for human consumption in (state country of origin).

While not always requested by relevant Hong Kong SAR authorities, it is prudent for a Health Certificate to accompany fish and seafood imported into the Hong Kong SAR

- Microbiological guidelines for bivalve molluscs to be consumed in a raw state:
 - Total aerobic plate count: Not exceeding 50,000 organisms per gram of meat.
 - Most probable number: Not exceeding 3 organisms per gram of *Escherichia coli*: meat.

Code of Practice for live marine fish to prevent Ciguatera poisoning

The Hong Kong SAR Food and Environmental Hygiene Department (FEHD) has devised a Code of Practice which contains the minimum requirements for importing and selling live marine fish for human consumption to ensure food safety, especially in terms of the prevention and control of ciguatera fish poisoning. The Code is applicable to all importers, wholesalers (including local fish farms) and retailers (including restaurants selling live marine fish) who import or sell live marine fish.

To allow prompt and effective control measures in case of the occurrence of ciguatera fish poisoning cases, importers, wholesalers and retailers should keep proper and accurate records of the supplies and distribution of all live marine fish with details on the source of fish, landing point, distribution, amount, types of fish, and addresses and names of purchasers and distributors for at least 60 days counting from the date of each transaction. The records should be readily available for inspection at all times by officer(s) of the Government of the Hong Kong SAR.

For further information contact:

Food and Environmental Hygiene Department
 Hong Kong SAR
 44/F Queensway Government Offices,
 66 Queensway, Hong Kong
 E-mail: enquiries@fehd.gov.hk
http://www.fehd.gov.hk/safefood/library/Ciguatera_fish/fish_cop.html

Product testing

The Food and Environmental Hygiene Department (FEHD) tests for food adulteration including the maximum concentration of heavy metals, including mercury, cadmium and arsenic. Samples for testing are purchased.

In general, tested product is released within six hours, depending on the number of consignments arriving. The FEHD issues a release letter, which it can do electronically to speed the movement of goods.

The FEHD monitors preservatives, including boric acid and sulphur dioxide, which are not allowed in fresh seafood. Ascorbic acid is limited to 1000 ppm.

For further information, contact:

Food and Environmental Hygiene Department
 Tel: +852 2867 5570 or 2868 0000 (24 hours)
 Fax: +852 2893 3547

Minimum temperature requirements

There are no specific temperature requirements for the storage and transport of food. However, chilled product should be held at -4°C Centigrade, or below.

Packaging requirements

Packaging must be carried out under satisfactory conditions of hygiene to prevent/preclude contamination of the fisheries products.

Packaging materials and products that enter into contact with fisheries products must comply with all the rules of hygiene and, in particular:

- they must not impair the organoleptic (taste, odour) properties of the fisheries products
- they must not be capable of transferring substances to the foodstuffs in quantities that could be dangerous to human health
- they must be strong enough to protect the fisheries product adequately.

7. Meet general shipping requirements

Language, measures and currency

Language:	English and Chinese English can be used for all documentation and it is unnecessary to use Chinese characters in labelling, except for retail ready product.
Currency:	Hong Kong dollar (HK\$)
Measures:	Metric
Quotations:	C.I.F

Commercial shipment requirements

The Hong Kong SAR adheres to the Standards Code negotiated under the General Agreement on Tariffs and Trade (GATT). Any food, whether imported or locally produced, intended for sale in the Hong Kong SAR must comply with the local food laws.

Commercial invoice

No special form of invoice is required, but two copies should be supplied. The following details should be included on the invoice:

- Number of packages.
- Marks, prices and descriptions of goods.
- Quantity.
- Place of origin.
- Insurance and freight.
- Additional information to facilitate Customs clearance.
- CIF and FOB value.

The Hong Kong SAR is a free port and does not levy any Customs tariffs on most imported goods, including all seafood imports. There is no tariff quota or surcharge. There are no value-added taxes, general services taxes or consumption taxes

Certificate of Origin

Not generally required. However, one may be required in certain circumstances. Check with the buyer.

Marking

There are no special marks particular to the Hong Kong SAR. It is not essential to mark shipping instructions in Chinese characters on cases.

Labelling

Labelling can be in either English or Chinese. Non-tariff barriers such as labelling requirements, standards, etc., are virtually nonexistent. However, labelling should be designed in a manner not to mislead the consumer.

Pre-packaged foodstuffs are subject to specific labelling regulations and packaging must contain the following:

- the designation (name) of the product
- a list of ingredients, in descending order of weight or volume, headed by the word ingredients or a statement that incorporates this word
- a statement of storage conditions and instructions for use
- net weight or volume
- the name and address of the manufacturer or packer
- a 'use by' date, including date, month and year (**in Chinese and English**).

Irradiated products must be labelled in Chinese and English.

Transshipping requirements

Documentation required for transshipping goods:

- Transit permit.
- Health certificate, when applicable.

8. Tariffs and additional taxes

The Hong Kong SAR is a free port and does not levy any Customs tariffs on most imported goods, including all seafood imports. There is no tariff quota or surcharge. There are no value-added taxes, general services taxes or consumption taxes.

Importers are required by law to use the Harmonised System to make trade declarations. The Hong Kong SAR Imports and Exports Classification List (Harmonised System) is published by the Hong Kong SAR Government and is available at the sales office of the Hong Kong Customs Census and Statistics Department and the Hong Kong SAR Government Publications Centre.

http://www.info.gov.hk/censtatd/eng/news/rev_stat/hkiecl_amend/hkiecl_amend_index.html

9. Some seafood products are restricted, including CITES/Endangered Species

The Hong Kong SAR Government is a party to the Washington Convention on the Control of Trade of Endangered Species (CITES) and exercises strict control over the shipment of live specimens of ‘Scheduled Species’. ‘Endangered Species’ include live and dead endangered species, and their parts and derivatives.

No CITES scheduled fish and seafood species will be accepted for shipment unless a valid export license has been obtained from the country of departure and a valid import license for the country of import, issued under CITES-based local legislation.

To import or possess any endangered species, a CITES Import/Possession License must be obtained for individual shipments in advance (one month minimum) from the Agriculture and Fisheries Department.

http://www.afcd.gov.hk/permit/permit_e.htm

Crocodile exports to Hong Kong SAR

For farmed crocodile exports Hong Kong SAR requires an additional Official Certificate from Australian exporters. The EX326 is available from AQIS Fish Exports Program and certifies that the product is from Australia, is derived from premises registered under the Export Control Act, and is safe for human consumption (see AQIS contacts section earlier this chapter).

10. Apply for a permit to transport fish and seafood products within the Hong Kong SAR (where applicable)

Transportation of marine fish in Hong Kong is governed by Regulation 3 of the Marine Fish (Marketing and Exportation) Regulation, Cap 291. The regulation requires a Marine Fish Transportation Permit from the Director of Marketing for marine fish (excluding live marine fish) to be transported in excess of 60 kg on land or in the waters of the Hong Kong SAR.

Any person who contravenes this regulation commits an offence and is liable to a maximum fine of HK\$10,000 and to imprisonment for six months.

Further inquiries regarding the Marine Fish Transportation Permit contact:

Fisheries Officer

Fisheries Marketing

Agriculture and Fisheries Department

Tel: +852 2150 7066

Fax: +852 2314 2866

No CITES scheduled fish and seafood species will be accepted for shipment unless a valid export license has been obtained from the country of departure and a valid import license for the country of import, issued under CITES-based local legislation

Exporting to
Hong Kong SAR
is generally less
complicated
than exporting
to many other
Asian countries

11. Seafood marketing and distribution in the Hong Kong SAR

Exporting to Hong Kong SAR is generally less complicated than exporting to many other Asian countries. Infrastructure and channels of distribution are well developed for both seafood imports and exports. The Hong Kong SAR exhibits a relatively direct marketing chain, in which private traders/importers offer an attractive option for Australian seafood exporters. For in-country contacts and assistance, contact Austrade at:

Room 2404, 24/F, Harbour Centre
25 Harbour Road
Wanchai
Hong Kong
Tel: +852 2588 5300
Fax: +852 2827 4145
E-mail: hong_kong@austrade.gov.au
Monday to Friday, 8.45am–5.00pm

Market distribution options (excluding live seafood)

Most Australian seafood is sold on the Hong Kong market through private traders/importers²⁵.

Exporters may choose to deal with private traders/importers or bypass this distribution option and deal directly with wholesalers, some supermarkets or end users, such as hotels, restaurants and other food service providers (see Figure 15).

Market distribution options for live seafood

For live seafood imports into Hong Kong, exporters generally deal directly with importers and traders. From there, seafood product is distributed to wholesalers, restaurants, specialty supermarkets, wet markets or re-exported (see Figure 16).

Wholesale seafood markets

The non-profit Fish Marketing Organisation (FMO) is administered by the Director of Hong Kong SAR's Agriculture and Fisheries Department. It operates seven wholesale fish markets and provides orderly marketing for commercial fishers and marine fish retailers. Revenue to run the markets is derived from a commission on sales and service charges.

²⁵ Source: An Analysis of Asian Markets for Seafood Products, QDPI.

Figure 15: Distribution options for imported seafood to the Hong Kong SAR (excluding live seafood)

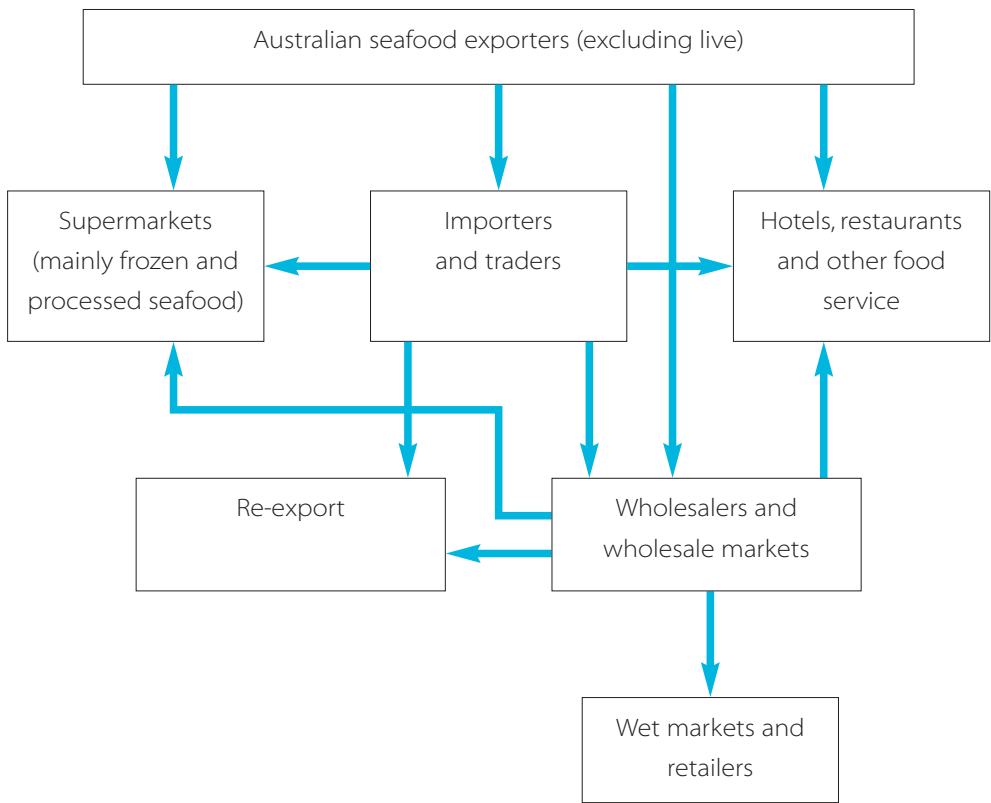
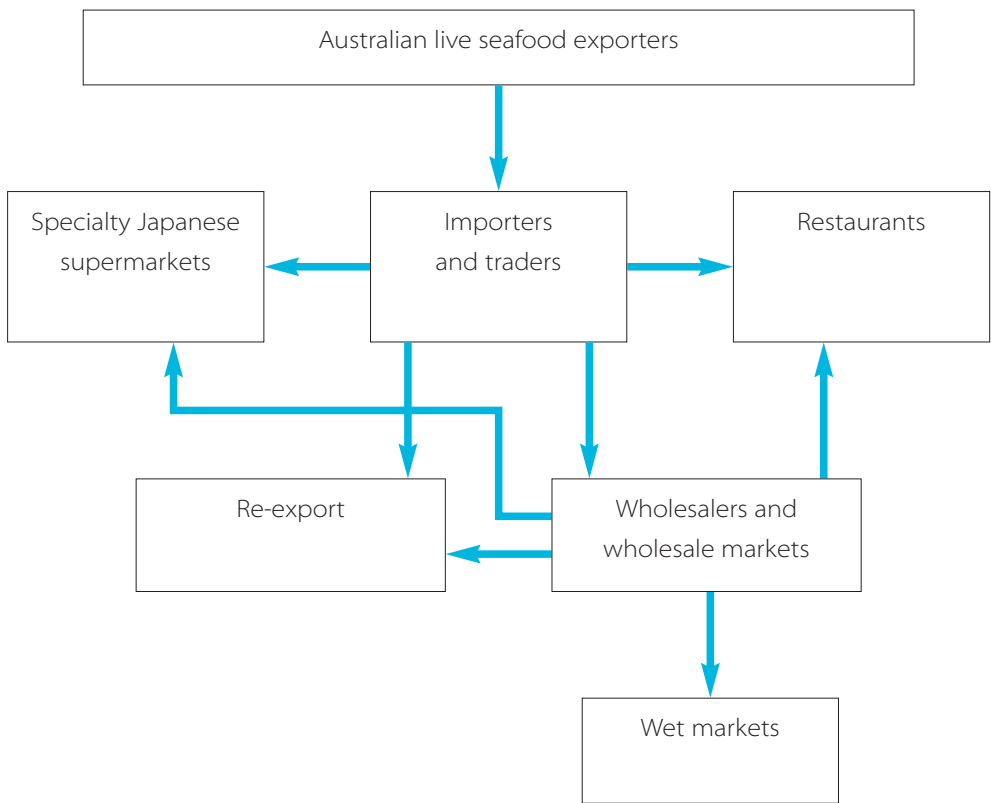


Figure 16: Distribution options for imported live seafood to the Hong Kong SAR



Marine Fish Marketing Ordinance, CAP 291

- All fresh marine fish (live shellfish, marine fish and fish in transshipment not included) are required to be landed and sold wholesale at the wholesale fish markets operated by the Fish Marketing Organisation.
- Except with a permit issued by the Director of Marketing, no fresh marine fish shall be transported on land or in the waters of Hong Kong in quantities in excess of 60 kg.
- Any person who contravenes the above regulations commits an offence and is liable to a maximum fine of HK\$10,000 and imprisonment for six months.
- For inquiries, please contact FMO or the Fisheries Supporting Services, Agriculture, Fisheries and Conservation Department, 8/F, Cheung Sha Wan Government Offices, 303 Cheung Sha Wan Road, Kowloon;
Tel: +852 2150 7066 or +852 2150 7103; Fax: +852 2314 2866.

During 2003–04, the FMO sold 41,566 Mt of seafood through its wholesale markets. This volume was down by 11.5 per cent on 2002–03 due mainly to local fisheries closures and the SARS epidemic, but also marks a five-year trend of reduced sales tonnage.

Amongst the seven wholesale fish markets in the Hong Kong SAR only Aberdeen, Cheung Sha Wan and Kwun Tong have operations that handling live fish and seafood.

Wholesale fish markets run by the FMO

Aberdeen Wholesale Fish Market	Tel: +852 2552 8853
Cheung Sha Wan Wholesale Fish Market	Tel: +852 2307 8758
Kwun Tong Wholesale Fish Market	Tel: +852 2775 5987
Sai Kung Wholesale Fish Market	Tel: +852 2792 2735
Shau Kei Wan Wholesale Fish Market	Tel: +852 2568 6312
Castle Peak Wholesale Fish Market	Tel: +852 2450 6445
Tai Po Wholesale Fish Market	Tel: +852 2664 4208

Fish Marketing Organisation www.fmo.org.hk/indexeng.html

CHAPTER 4

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Hong Kong SAR seafood market information

Hong Kong SAR Fish Marketing Organisation (FMO)

Wholesale prices at Aberdeen wholesale seafood markets

www.fmo.org.hk/indexeng.html

The FMO website gives free wholesale price information for FMO wholesale markets.

FMO — General Manager's Office

757 Lai Chi Kok Road, Kowloon

Hong Kong SAR

Tel: +852 2387 8648

Fax: +852 2728 7883

E-mail: gm@fmo.org.hk

Aberdeen Wholesale Fish Market

102 Shek Pai Wan Road, Aberdeen

Hong Kong SAR

Tel: +852 2552 8853

Fax: +852 2552 3058

E-mail: awfm@fmo.org.hk

INFOYU

www.globefish.org/index.php?id=2074

The Chinese Government established INFOYU with assistance from the UN's Food and Agriculture Organisation. INFOYU is based in Beijing and has two branches in Guangdong and Shanghai. INFOYU has also developed a comprehensive network linked to 130 fish wholesale markets nationwide, and receives fish price reports from 60 of them twice a week.

INFOYU has become the leading source of marketing support for producers and exporters in China, the world's largest fish producing country. Its services include bringing buyers and sellers together, publishing current and long-term marketing information, and operating trade advisory services. It also organises conferences, workshops, seminars and training programs, and undertakes consultancies on all aspects of fisheries — fishing, aquaculture, processing and marketing.

INFOYU — *Fishery Industry in China Report* (September 2004)

The report (US\$30) is available from www.globefish.org/index.php?id=214

INFOYU contact details:

Room 203, Building 18 Maizidian Street
Chaoyang District
Beijing 100026
P.R. China
Tel: +86 10 64195140
Fax: +86 10 64195141
E-mail: infoyu@agri.gov.cn

Hong Kong SAR Government — Trade Statistical Database

www.info.gov.hk/censtatd/home.html

Elsa Lee
Statistician
Census and Statistics Department
Government of the Hong Kong SAR
Tel: +852 2582 4915 (switchboard)
E-mail: elylee@censtatd.gov.hk

Tom Siu
Statistician
Census and Statistics Department
Government of the Hong Kong SAR
Tel: +852 2582 4459
E-mail: ta_1@censtatd.gov.hk

GLOBEFISH — *Seafood market information and China fishing industry report (September 2004)*

www.globefish.org/

GLOBEFISH is the unit in the FAO Fisheries Department responsible for information on international fish trade. GLOBEFISH is an integral part of the FISH INFO network and plays a coordinating role in network activities.

The core of GLOBEFISH is the GLOBEFISH Databank. GLOBEFISH produces several publications, including world seafood price reports, market studies and trend analyses (*GLOBEFISH Highlights*). The FAO and GLOBEFISH Partners jointly finance GLOBEFISH.

Commodity Updates provides information on prices, imports, exports and production by commodity. The information is taken from the network of GLOBEFISH correspondents, INFOYU, *INFOFISH Trade News*, FAO FISHDAB and others.

Monthly world price and world market reports for tuna, shrimp, crab, salmon, bivalves, small pelagics, ground fish, cephalopods, fish meal and oil, lobster, aquaculture and freshwater seafood, sea bass and sea brim are available free-of-charge at: www.globefish.org/index.php?id=923

Australian Government contacts in the Hong Kong SAR and mainland China

Austrade

Hong Kong SAR

Australian Trade Commission

Room 2404, 24/F, Harbour Centre

25 Harbour Road, Wanchai

Hong Kong

Tel: +852 2588 5300

Fax: +852 2827 4145

E-mail : hong_kong@austrade.gov.au

Monday to Friday, 8.45am–5.00pm

Australian Consulate-General

23/F, Harbour Centre

25 Harbour Road, Wanchai

Hong Kong

Tel: +852 2827 8881

Fax: +852 2585 4457

Mainland China

Australian Embassy

21 Dongzhimenwai Street

Sanlitun Beijing 100600

People's Republic of China

Tel: +86 10 6532 2331

Fax: +86 10 6532 4605

Office hours: 8.30am–12.30pm and 1.30pm–4.51pm, Monday to Friday

Customs Counsellor, Australian Embassy

Mr Tom Anderson

21 Dongzhimenwai Street

Sanlitun Beijing 100600

People's Republic of China

Tel: +86 10 6532 2331

Fax: +86 10 6532 4605

Department of Agriculture, Fisheries and Forestry (DAFF) — Counsellor (Agriculture)

Mainland China

Counsellor (Agriculture)

Beijing

Mark Schipp

Tel: +86 10 5140 4155

E-mail: mark.schipp@dfat.gov.au

Hong Kong SAR and mainland China seafood exhibitions and conferences

12th Biennial HOFEX (Hong Kong SAR), (possibly May) 2007

www.hofex.com/

Products on show at HOFEX are guaranteed exposure to more than 30,000 buyers from Hong Kong, China and the Asia-Pacific region.

All sectors of the food industry will be on show — from beverages and processed food to chilled food, ingredients and dairy products. All aspects of hospitality management will also be on show — from bakery and foodservice equipment to hotel supplies and internet solutions.

As a major centre for re-export, Hong Kong is the ideal event location for HOFEX. It is a gateway to and from the lucrative China market. About 30 per cent of China's foreign trade is handled via Hong Kong, and 43 per cent of Hong Kong's exports go to mainland China. Hong Kong also serves as a sourcing hub of food and hospitality products for other neighbouring countries and regions, such as Macau, Taiwan, the Republic of Korea, the Philippines and Thailand.

Hong Kong Exhibition Services Ltd
Unit 2010, 20/F, China Resources Building
26 Harbour Road, Wanchai, Hong Kong
Tel: +852 2804 1500
Fax: +852 2528 3103
E-mail: exhibit@hkesallworld.com
Website: www.hkesallworld.com
Contact: Ms Vivian Lui/Ms Heidi Au

SIAL 2006 (Shanghai, China) 29–31 May 2006

www.sialchina.com/

www.austrade.gov.au/australia/layout/0,,0_S2-1_CLNTXID0032-2_-3_PWB110543168-4_-5_-6_-7_,00.html

SIAL 2006 (29–31 May) will be held in Shanghai (China)

In 2005, 43 national pavilions and 800 exhibitors (up 14 per cent from the previous year), including international exhibitors from 53 countries made SIAL China, the country's most international exhibition.

With every year, SIAL China is consolidating its position as the leading trade show for professionals of the food and beverage industry in China. Both the exhibition area and the number of exhibitors and visitors increase every year. Between 2002 and 2004: +40% net stand area, +21% visitors, +14% exhibitors.

SIAL China has a far-reaching impact, spanning Asia. The exhibition welcomes large delegations of buyers from Korea, Japan, Thailand, Hong Kong and Taiwan.

Contact details

Austrade Shanghai will be supporting SIAL 2006 and will provide a number of services for Australian industry at the exhibition including organising an Australian Pavilion, recruiting Australian exhibitors, and providing tailored services to exhibitors such as editing Australian product brochures, and match-making at the networking function with Chinese customers.

For more information, contact Stella Cai or Willa Yang, Austrade Shanghai

Tel: +86 21 6321 1333

E-mail: Stella.Cai@austrade.gov.au and
willa.yang@austrade.gov.au

Fayworth House
Suite 601, Level 6
379–383 Pitt Street
Sydney NSW 2000
Australia

Mr Jean-Philippe Grange
and Mr Martin Spierings
Tel: 02 9264 4199
Fax: 02 9264 5414
E-mail: jp.grange@altios-international.com
m.spierings@altios-international.com

Hong Kong SAR Government contacts

Agriculture, Fisheries and Conservation Department:

Tel: +852 2708 8885

E-mail: mailbox@afcd.gov.hk

www.afcd.gov.hk

Aberdeen Fisheries Office

Tel: +852 2873 8325

Census and Statistics Department

Merchandise Trade Statistics

Tel: +852 2582 4915 (switchboard)

Fax: +852 2802 1101

E-mail: trade@censtatd.gov.hk

www.info.gov.hk/censtatd/home.html

Food and Environmental Hygiene Department

Chief Health Inspector — Import and Export

Mr Tam Kam-Tong

Tel: +852 2867 5578

Fax: +852 2893 3547

E-mail: enquiries@fehd.gov.hk

www.fehd.gov.hk

Customs and Excise Department
(including Import and Export Declarations and Assessment)

Tel: +852 2815 7711

Fax: +852 2542 3334

E-mail: customsenquiry@customs.gov.hk

www.info.gov.hk/customs/eng/content_e.html

Department of Health

Tel: +852 2961 8989

Fax: +852 2836 0071

E-mail: enquiries@dh.gov.hk

www.info.gov.hk/dh/

Trade and Industry Department (TID)

Tel: +852 2392 2922

E-mail: enquiry@tid.gov.hk

www.tid.gov.hk/

Hong Kong SAR Trade Associations

Australian Chamber of Commerce in the Hong Kong SAR

www.austcham.com.hk

The Australian Chamber of Commerce (AustCham) in Hong Kong — the largest Australian chamber outside Australia — was formed in 1987 to facilitate business development and networking opportunities for its members. It is among the largest international chambers in Hong Kong, reflecting the growing strength of Australian business in greater China.

Over the past 18 years, AustCham has grown to almost 900 corporate members, representing nearly 500 Australian companies and a community of about 50,000. AustCham member companies employ more than 200,000 people in Hong Kong, 6.2 per cent of the workforce.

Publications

AustCham produces a monthly magazine, *Austcham News*, an annual directory, *Australian Business in Hong Kong* and a weekly members-only *Newsflash*.

Contact details

Tel: +852 2522 5054

Fax: +852 2877 0860

E-mail: austcham@austcham.com.hk

Hong Kong Seafood Importers Association

Mr Lee Choi Wah (Chair)

Mr K.S. Lee (Administration Officer)

2/F Kwun Tong Wholesale Fish Market

10 Tunng Yuen Street, Tau Tong, Kowloon, Hong Kong

Tel: +852 2349 9442

Fax: +852 2174 5010

E-mail: seafdchm@pacific.net.hk

The Australian Chamber of Commerce in Hong Kong — the largest Australian chamber outside Australia — was formed in 1987 to facilitate business development and networking opportunities for its members

The annual
*Australian
Fisheries Statistics*
publication,
produced by the
Australian Bureau
of Agricultural
and Resource
Economics,
provides a
summary of the
catch and trade in
fisheries products

Hong Kong Dried Seafood & Grocery Merchants Association Limited
Tel: +852 2547 1912
Fax: +852 2517 6883
www.tdctrade.com/hksar/163.htm

Hong Kong SAR Fish Marketing Organisation (FMO)
General Manager's Office
Tel: +852 2387 8648
Fax: +852 2728 7883
E-mail: gm@fmo.org.hk
www.fmo.org.hk/indexeng.html

The Hong Kong General Chamber of Commerce
Tel: +852 2529 9229
Fax: +852 2527 9843
E-mail: chamber@chamber.org.hk
www.chamber.org.hk/

The Chinese General Chamber of Commerce
www.cgcc.org.hk/index_e.html

Hong Kong Trade Development Council:
Tel: +852 1830 668
Fax: +852 2824 0249
E-mail: hktdc@tdc.org.hk
www.tdctrade.com/

Australian seafood exports trade information and additional key information sources

Australian Fisheries Statistics (ABARE)

www.abareconomics.com (Publications)

The annual *Australian Fisheries Statistics* publication, produced by the Australian Bureau of Agricultural and Resource Economics, provides a summary of the catch and trade in fisheries products.

The information includes:

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

How to access

Electronic copies of the latest *Australian Fisheries Statistics* are available free-of-charge from ABARE's website.

ABARE
Publications Officer
GPO Box 1563, Canberra ACT 2601
Tel: 02 6272 2010
Fax: 02 6272 2330
E-mail: abareproducts@abare.gov.au
www.abareconomics.com (Publications)

Monthly Trade Data — Australian Bureau of Statistics (ABS)

www.abs.gov.au

The Australian Bureau of Statistics 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 labour costs involved in accessing the ABS database will determine the fee.

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

The FishBook II — A guide to Australian Government programs, grants and services for the Australian seafood industry (October 2005 Edition)

www.daff.gov.au

The guide addresses the difficulties businesses and individuals, particularly those in remote and regional areas, can face in identifying and accessing government resources.

The FishBook II details all programs relevant to Australia's seafood industry. It places them under six main categories: primary production (including fisheries and aquaculture); exports, customs and quarantine; innovation, research and development; business and taxation assistance; employment and training; and fisheries and environmental management.

For each grant, program or service listed, there is an explanation of its major objectives, the types of assistance available and how to apply, as well as contact information.

The FishBook II serves as a handy reference guide by including contact details for key industry-related information sources, as well as for seafood industry assistance available in each state and the Northern Territory.

DAFF produced the guide in conjunction with the Australian Seafood Industry Council (ASIC) and Seafood Services Australia (SSA). It can be downloaded free-of-charge from www.daff.gov.au (Publications) (Fisheries).

Alternatively, contact ASIC, on 02 6281 0383, Ted Loveday, SSA, on 1300 130 321 or Jim Fitzgerald, DAFF, on 02 6272 5573 for a copy.

The FishBook II
details all programs
relevant to
Australia's seafood
industry

For each grant,
program or service
listed, there is an
explanation of its
major objectives,
the types of
assistance available
and how to apply,
as well as contact
information

A\$34 billion reasons to access the US seafood market — A guide to exporting Australia's fisheries products to the United States

www.daff.gov.au

A\$34 billion reasons to access the US seafood market — A guide to exporting Australia's fisheries products to the United States was the first in the series of seafood export market guides DAFF produced with the Australian Seafood Industry Council. The guide provides small-to-medium exporters with market information on export opportunities in the US seafood market.

It is available free of charge from the DAFF website: www.daff.gov.au (Publications) (Fisheries), or contact DAFF's Fisheries and Aquaculture Branch on 02 6272 5777.

A\$40 billion reasons to access the EU seafood market — A guide to exporting Australia's fisheries products to the European Union

www.daff.gov.au

A\$40 billion reasons to access the EU seafood market — A guide to exporting Australia's fisheries products to the European Union was the second in the series of seafood export market guides DAFF produced with the Australian Seafood Industry Council. The guide seeks to demystify the complex regulatory import system for seafood products to the EU.

It is available free of charge from the DAFF website: www.daff.gov.au (Publications) (Fisheries), or contact DAFF's Fisheries and Aquaculture Branch on 02 6272 5777.

The Customs Guide to Importing and Exporting

www.customs.gov.au

The Customs Guide to Importing and Exporting is designed for all who use the Australian Customs Service — importers, exporters, local manufacturers or producers. While the guide provides a useful source of information for all Customs clients, it focuses on assisting small business, including businesses that have not previously been involved in international trade. Customs recognises small business is important to Australia's economic future and provides information to help small business handle Customs procedures.

It provides an overview of Customs rules, regulations and processes, and explains 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 Importing and Exporting is available at www.customs.gov.au/webdata/resources/files/guideimport_export1.pdf

Another key Customs export guide is *Export Control*, Volume 12, which is available at www.customs.gov.au/webdata/resources/files/volume12.pdf

Customs Information Centre: 1300 363 263

E-mail: information@customs.gov.au

The Customs
Guide to Importing
and Exporting
is designed for
all who use the
Australian Customs
Service —
importers,
exporters, local
manufacturers
or producers

The Australian Institute of Export

www.aiex.com.au

Established in 1956, the Australian Institute of Export fosters, promotes and develops export awareness within Australia. As the professional association representing exporters, the Institute covers four areas:

- hands-on training in export practice
- continuing postgraduate education
- networking through Institute membership and activities
- providing independent advice to Government on export policy.

The Institute is dedicated to improving the professional status of exporters by providing practical training and continuing education for members and graduates.

It has representative offices in all states and cooperates with Australian and state government departments and agencies in promoting international trade.

The Institute organises conferences and seminars to address contemporary issues and raise community awareness of the importance of international trade to the Australian community.

Level 12, 83 Clarence Street

Sydney NSW 2000

Tel: 02 9350 8170

Fax: 02 9262 3262

E-mail: aiexfed@aiex.com.au

The Marine Stewardship Council (MSC)

www.msc.org

The Marine Stewardship Council is an international, non-profit, accreditation and standard-setting organisation that facilitates recognition of sustainable fisheries in the market place through a certification and labelling program.

Fisheries that believe they meet international standards for sustainability and good management can apply to be assessed by third party certifiers against the MSC Standard. Fisheries that meet the Standard can use the MSC's logo to market their product to consumers who want to make the best environmental choice in seafood.

There is a growing market for products bearing the MSC's logo in Europe. Several leading European retail chains have committed themselves to source sustainable seafood products, and the MSC logo is attracting increased consumer recognition.

The MSC has offices in London and Sydney. The London office maintains a market outreach program for Europe and can provide fishery participants with advice on potential markets for certified produce. The Sydney office is the primary contact point for fisheries that want to discuss access to the certification program.

The Marine Stewardship Council is an international, non-profit, accreditation and standard-setting organisation that facilitates recognition of sustainable fisheries in the market place through a certification and labelling program

Updates on the MSC can be found at www.msc.org. Contact details are:

MSC London
119 Altenburg Gardens
London SW11 1JQ
United Kingdom
Tel: +44 20 7350 4000
Fax: +44 20 7350 1231
E-mail: info@msc.org

MSC Asia Pacific
10/46–48 Urunga Parade
Miranda NSW 2228
Tel: 02 9524 8400
Fax: 02 9524 8900
E-mail: duncan.leadbitter@msc.org

The Australian
Seafood Industry
Council is the peak
body representing
the commercial
wild harvest,
aquaculture
and post-harvest
seafood industries
in Australia

Australian seafood industry contacts

Australian Seafood Industry Council (ASIC)

www.asic.org.au

The Australian Seafood Industry Council is the peak body representing the commercial wild harvest, aquaculture and post-harvest seafood industries in Australia. The industry's gross value of production is \$2.1 billion, including \$1.6 billion in exports.

ASIC's mission is: *Through industry leadership and representation, provide a single united voice for all sectors of the Australian seafood industry on national issues of importance to the industry.*

That is why ASIC is located in Canberra, close to the seat of the Australian Government and the decision makers. However, it remains responsive to the interests of state, territory and Commonwealth waters' fishing operators and aquaculturists, as well as the post-harvest sector.

ASIC members are: the East Coast Tuna Boat Owners' Association, Tuna Boat Owners' Association of South Australia, Northern Territory Seafood Council, NSW Seafood Industry Council, Queensland Seafood Industry Association, South Australian Fishing Industry Council, Seafood Council South Australia, Tasmanian Fishing Industry Council, Seafood Industry Victoria, Western Australian Fishing Industry Council, South East Trawl Fishing Industry Association, Northern Prawn Fishing Industry Organisations, Master Fish Merchants' Association of Australia, Sydney Fish Market, Commonwealth Fisheries' Association (affiliate), and National Aquaculture Council (observer).

Australian Seafood Industry Council
PO Box 533, Curtin ACT 2605
Tel: 02 6281 0383
Fax: 02 6281 0438
E-mail: asic@asic.org.au

Seafood Services Australia (SSA)

www.seafoodservices.com.au

SSA is a not-for-profit company established as a catalyst for sustainable development of the seafood industry. SSA's founding members are the Fisheries Research and Development Corporation and the Australian Seafood Industry Council. SSA's constitution focuses the company on helping the industry overcome impediments to its development that exist because of 'market' or 'institutional' failure.

SSA helps seafood businesses and organisations become more competitive in increasingly challenging and sophisticated domestic and global markets. It also assists seafood businesses and fisheries to follow sustainable, responsible environmental practices, and demonstrate them clearly to the community.

By tapping into SSA's resources, you can identify your main challenges and opportunities for business success, especially with:

- seafood supply chain development ('water-to-waiter')
- environmental management systems
- seafood safety and quality
- trade and market development
- seafood industry occupational health and safety.

The SSA network brings together the expertise and resources seafood industry people need to make the most of the opportunities. Network participants include people and organisations that span the seafood industry, R&D agencies and government throughout Australia and overseas. Their experience base includes industry development, trade and commerce, market development, public policy and administration, science and technology, business management and corporate governance.

SSA constantly looks for opportunities and fosters alliances, collaboration, consultation and communication among industry stakeholders.

Seafood Services Australia

PO Box 2188, Ascot Qld 4007

Tel: 1300 130 321

Fax: 07 3633 6776

E-mail: ssa@seafoodservices.com.au

Fisheries Research and Development Corporation (FRDC)

www.frdc.com.au

The FRDC is a rural research and development corporation. Formed as a statutory corporation on 2 July 1991 under the *Primary Industries and Energy Research and Development Act 1989*, it is a national organisation responsible to its stakeholders for:

- planning, investing in and managing R&D programs
- facilitating the dissemination, adoption and commercialisation of R&D results.

The FRDC does not undertake research. It identifies R&D needs and addresses them through planning and by contracting research providers.

The FRDC has become widely recognised as the leading Australian agency planning, funding and managing fisheries R&D.

Its stakeholders are the fishing industry, Australian, state and territory governments, and the people of Australia.

FRDC

Fisheries Research House, 25 Geils Court, Deakin West, ACT

Postal address: PO Box 222, Deakin West ACT 2600

Tel: 02 6285 0400

Fax: 02 6285 4421

E-mail: frdc@frdc.com.au

The FRDC has
become widely
recognised as the
leading Australian
agency planning,
funding and
managing
fisheries R&D

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Australian Government Department of Agriculture, Fisheries and Forestry (DAFF)

www.daff.gov.au

DAFF is the Australian Government department responsible for agriculture, fisheries, forestry and food. Its mission is to increase the profitability, competitiveness and sustainability of Australian agriculture, fisheries, forestry and food industries, and enhance the natural resource base to achieve greater national wealth, and stronger rural and regional communities.

Tel: Information Officer 02 6272 5120 or switchboard 02 6272 3933

E-mail: fisheries@daff.gov.au

Fisheries and Aquaculture Branch

www.daff.gov.au (Industry Development) (Fisheries)

DAFF's Fisheries and Aquaculture Branch coordinates policy development for Commonwealth fisheries. The branch is responsible for developing policy and providing advice to government on Commonwealth fisheries issues, including international and domestic fisheries, marine pests, sustainable fishing, aquaculture, and market access and trade.

Contact

Mr Glenn Hurry

General Manager

Fisheries and Aquaculture Branch

PO Box 858, Canberra ACT 2601

Tel: 02 6272 5777

E-mail: glenn.hurry@daff.gov.au

Australian Quarantine and Inspection Service (AQIS)

www.aqis.gov.au (Quarantine and Export Services)

AQIS Export Facilitation Program for Fish

www.aqis.gov.au/export/exportfacilitation

AQIS operates an Export Facilitation Program. The program assists existing and potential exporters of agricultural and fisheries commodities, in line with Australian and importing country requirements.

As part of the program, AQIS export facilitators provide free information on the following topics: other countries' import conditions, where known; legislative requirements for export; general quality assurance arrangements; premises' registration requirements; inspection procedures; AQIS fees and charges; documentation; and advice for exporters experiencing difficulties with government health documentation or other quarantine requirements.

AQIS export facilitators provide general export information but, for detailed assistance, you should deal with officers from the AQIS Fish Exports Program.

AQIS Export Facilitation Officers

New South Wales

Tel: 02 8838 3103

Fax: 02 9630 4650

E-mail: nswexport@aqis.gov.au

Victoria/Tasmania

Tel: 03 8318 6754

Fax: 03 8318 6748

E-mail: victaexport@aqis.gov.au

Queensland

Tel: 07 3246 8709

Fax: 07 3246 8652

E-mail: qldexport@aqis.gov.au

Western Australia

Tel: 08 9311 5437

Fax: 08 9311 5466

E-mail: waexport@aqis.gov.au

South Australia/Northern Territory

Tel: 08 8305 9713

Fax: 08 8305 9824

E-mail: santexport@aqis.gov.au

Internet:

www.aqis.gov.au/export/exportfacilitation

AQIS Fish Exports Program

www.aqis.gov.au (Quarantine and Export Services) (Export) (Exporting fish and fish products)

The Fish Exports Program provides operational policy and technical advice to the seafood export industry to help it maintain market access through competent inspection staff and quality assurance-based inspection systems.

The program's functions include:

- inspecting and approving registration of establishments' eligibility to export fish and/or eggs
- auditing food safety plans (AA, FPA or AQA systems), based on a Hazard Analysis and Critical Control Points (HACCP) management system
- issuing export permits
- issuing health certificates (necessary for the importing country to accept the exported commodity).

Tel: 02 6272 5141

Fax: 02 6272 3682

E-mail: eileen.gosling@aqis.gov.au

AQIS Technical Standards Branch

www.aqis.gov.au (Quarantine and Export Services) (Export) (Exporting Food)

For seafood exports, the Technical Standards Branch:

- negotiates with importing country authorities to gain, maintain or improve access for new seafood products to existing overseas markets and access for Australian seafood, generally, to new overseas markets
- negotiates certification for seafood exports, if certification is required
- develops programs for, and hosts, inspection visits of the seafood export sector conducted by importing country authorities

- liaises with overseas authorities on general issues/inquiries
- participates in international forums, such as Codex Alimentarius (Codex)
- develops policy and provides technical support for operational programs
- audits shellfish food safety programs administered by (Australian) state government authorities.

Tel: 02 6261 6537

Fax: 02 6271 6522

E-mail: mark.kelly@aqis.gov.au

AQIS Regional Offices: AQIS Commodity Inspectors

www.aqis.gov.au

Senior export food inspectors in the regional offices will assist with registrations of export establishments; approval of HACCP-based systems; auditing of export-registered operations in line with Australian legislation and overseas country requirements; issue export documentation; issue invoices; and provide general information.

Western Australia — Perth
 Senior Export Food Inspector
 Greg Waller
 Tel: 08 9334 1572
 Fax: 08 9334 1668
 E-mail: greg.waller@aqis.gov.au

South Australia — Adelaide
 Senior Export Food Inspector
 John Oliver
 Tel: 08 8305 9741
 Fax: 08 8305 9824
 E-mail: john.oliver@aqis.gov.au

Queensland — Brisbane
 Senior Export Food Inspector
 Brian Johnston
 Tel: 07 3246 8746
 Fax: 07 3246 8792
 E-mail: brian.johnston@aqis.gov.au

Queensland — Cairns
 Senior Export Food Inspector
 Terry Montgomery
 Tel: 07 4030 7831
 Fax: 07 4034 9080
 E-mail: terry.montgomery@aqis.gov.au

New South Wales — Sydney
 Senior Export Food Inspector
 Sue Smith
 Tel: 02 8334 7488
 Fax: 02 8344 7480
 E-mail: sue.smith@aqis.gov.au

Victoria — Melbourne
 Senior Export Food Inspector
 Ed Lewellin
 Tel: 03 8318 6752
 Fax: 08 8318 6748
 E-mail: ed.lewellin@aqis.gov.au

Tasmania — Hobart
 Senior Export Food Inspector
 Tel: 03 6233 2502
 Fax: 03 6233 2552

Northern Territory — Darwin
 Senior Export Food Inspector
 Michael Greenhalgh
 Tel: 08 8999 2063
 Fax: 08 8999 2108
 E-mail: michael.greenhalgh@aqis.gov.au

AQIS Documentation and Registration Section

www.aqis.gov.au

The AQIS Documentation and Registration Section manages the Export Establishment Registration System (ER).

The section's functions in relation to export-registered establishments include:

- Registration of all recommended export fish processing and live fish export plants and vessels.
- Administration of all establishment details in ER, including registrations, deregistrations, assignment of registrations and amendments to registered operations, overseas listings and/or people in management and control.

Barbara Hiscock

Tel: 02 6272 5637

Fax: 02 6272 5614

E-mail: exportestablishmentregistration@aqis.gov.au

Australian Bureau of Agricultural and Resource Economics (ABARE)

www.abareconomics.com

The Australian Bureau of Agricultural and Resource Economics is an independent economic research agency. It provides information about the economics of the agricultural, forestry, fishing, minerals and energy industries. Every year, ABARE holds the OUTLOOK Conference, a leading forum for Australia's rural and resource industries. ABARE publishes a range of research reports as well as regular reports, such as *Australian Fisheries Statistics*.

Tel: 02 6272 2211

www.abareconomics.com

Biosecurity Australia

www.daff.gov.au

Biosecurity Australia, a group within DAFF, assesses the quarantine risk associated with commodity imports and undertakes technical negotiations on export market access with overseas counterpart agencies.

Tel: 02 6272 4436

E-mail: animalbiosecurity@daff.gov.au or biosecurityaustralia@daff.gov.au

Bureau of Rural Sciences (BRS)

www.brs.gov.au

The Bureau of Rural Sciences is an independent scientific research agency within DAFF. BRS is responsible for publishing the *Australian Fishery Status Reports* to provide governments and the community with independent reviews of stock status for fish stocks in Commonwealth-managed fisheries. Each status report includes background fishery information, overview of species biology, monitoring and research, current status and assessment of management.

The latest *Fishery Status Reports* can be downloaded free from the DAFF website www.daff.gov.au (scientific advice) (fisheries marine sciences). Printed copies are available from BRS (\$35.00 each).

Tel: 02 6272 4690 or Publications 02 6272 4430

E-mail: info.pubs@brs.gov.au

Australian Customs Service

www.customs.gov.au

The Customs Guide to Importing and Exporting is designed for all who use the Australian Customs Service — importers, exporters, local manufacturers or producers. While the guide provides a useful source of information for all Customs clients, it focuses on assisting small business, including businesses that have not previously been involved in international trade. Customs recognises small business is important to Australia's economic future and provides information to help small business handle Customs procedures.

An overview of Customs rules, regulations and processes explains 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 Importing and Exporting is available at www.customs.gov.au/webdata/resources/files/guideimport_export1.pdf

Another key Customs export guide is *Export Control*, Volume 12. It is available at www.customs.gov.au/webdata/resources/files/volume12.pdf

Customs Information Centre: 1300 363 263

E-mail: information@customs.gov.au

Australian Trade Commission (Austrade)

www.austrade.gov.au

An exporter's guide to Austrade

Austrade Advisory Service

The Advisory Service telephone 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. It provides initial advice and general market information, which help businesses decide how best to proceed. If Austrade cannot help, you will be referred to the appropriate government or private service provider that can.

Austrade's services to Australian companies include:

- practical export information and advice
- identification of overseas opportunities
- on-the-ground exporting support overseas and in Australia
- a comprehensive trade exhibition program

- services to identify potential overseas business partners and to research and access high potential markets for Australian companies
- strategic export planning and network formation services.

The New Exporter Development Program (NEDP)

The New Exporter Development Program gives Australian businesses the best possible start to exporting, by providing a wide range of free services to new exporters including advice and information about getting into exporting, export coaching, and assistance on the ground in foreign markets.

Austrade TradeStart

www.austrade.gov.au (for Australian exporters) (information for new exporters)

Austrade and TradeStart's services for new exporters provide eligible businesses with practical assistance to develop their businesses into successful exporting companies. Your export adviser and Austrade's international network will help you:

- Assess your export capability
 - review your export capability and evaluate export readiness
 - identify target markets
 - provide advice on finance and management
- Prepare for your selected market
 - advise on international marketing strategies and your marketing plan
 - provide feedback on promotional material
 - inform you about economic conditions and commercial practices in your target markets
 - evaluate the suitability of your product/service for target markets
- Visit your selected markets
 - make appointments with selected business contacts
 - arrange interpreters and translation of documents (at your cost)
 - arrange briefings by Austrade staff in-market on local practices and culture
- Follow through (by your export adviser) to
 - assess the outcomes of your visit
 - help you achieve maximum impact from the visit.

Tel: 13 28 78

E-mail: info@austrade

Austrade Export Market Development Grants (EMDG) Scheme

www.austrade.gov (for Australian exporters) (information for new exporters)

Austrade financially assists Australian exporters through the Export Market Development Grants scheme. The EMDG scheme reimburses some costs to eligible small- and medium-sized Australian-based businesses that have promoted their products in overseas markets.

E-mail: EMDG.help@austrade.gov.au

The New Exporter Development Program gives Australian businesses the best possible start to exporting, by providing a wide range of free services to new exporters including advice and information about getting into exporting, export coaching, and assistance on the ground in foreign markets

Export Finance and Insurance Corporation (EFIC)

www.efic.gov.au

The Export Finance and Insurance Corporation is Australia's export credit agency. EFIC provides international competitive finance and insurance services to Australian exporters and companies investing in new projects overseas. EFIC operates primarily in that part of the market the private sector does not serve. At the same time, EFIC is a self-funding organisation that operates according to commercial principles.

EFIC has two businesses, the Credit Insurance Group and Export Finance Group, to support Australian exports.

Credit Insurance Group

The Credit Insurance Group insures Australian exporters and banks against non-payment by overseas buyers or overseas banks for Australian exports, usually for 180 days, or less.

The credit insurance products EFIC offers to exporters to help manage payment risks include:

- export credit insurance
- export payment protection
- unfair calling insurance (for bonds)
- indirect export facility.

Export Finance Group

The Export Finance Group provides medium- to long-term finance facilities (generally over two years) to buyers of Australian exports, or their financiers, to help them buy exports. Exports financed this way are usually capital goods and/or services, rather than commodities or other consumables. The group also offers political risk insurance to protect investors and lenders against financial losses arising mainly from political events. The export finance products EFIC offers include:

- direct loan
- export finance guarantee
- documentary credit finance and guarantee
- political risk insurance
- medium-term payment insurance
- bonds and guarantees.

Tel: 1800 887 588

E-mail: info@efic.gov.au

Australian Fisheries Management Authority (AFMA)

www.afma.gov.au

The Australian Fisheries Management Authority is the Australian Government statutory authority responsible for efficiently managing Commonwealth fisheries resources for the 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. It provides management, advisory, compliance and licensing services, and implements appropriate fisheries management arrangements.

Tel: 02 6272 5029

www.afma.gov.au/about/contacts.php

Australian Government Department of Foreign Affairs and Trade (DFAT)

www.dfat.gov.au

The Department of Foreign Affairs and Trade's role is to advance the interests of Australia and Australians internationally. DFAT is the lead agency for trade policy for all Australian exports, including fisheries products. The department undertakes bilateral negotiations with other countries and takes part in multilateral forums, such as the World Trade Organization, to overcome market barriers facing Australian exports.

Tel: 02 6261 1111

Australian Government Department of Industry, Tourism and Resources (ITR)

www.industry.gov.au

The Department of Industry, Tourism and Resources develops and implements industry policies and business assistance programs that build on the Australian Government's three key economic-growth drivers — innovation, investment and international competitiveness. The policies and programs are designed to increase the international competitiveness of Australian manufacturing, resources and service industries, develop Australia's innovation and technology capabilities and infrastructure, and help increase the level of foreign investment in Australia.

Tel: 1800 024 095

E-mail: General inquiries: inquiries@industry.gov.au

Publications inquiries: publications@industry.gov.au

AusIndustry

www.ausindustry.gov.au

AusIndustry is the Australian Government's business agency within the Department of Industry, Tourism and Resources. The agency provides incentives for Australian business to foster investment in business and become more innovative and internationally competitive. AusIndustry products cover industry sector and business needs. It administers grants, tax concessions, duty concessions and venture capital programs.

Tel: 13 28 46

E-mail: hotline@ausindustry.gov.au

Australian Government Department of the Environment and Heritage (DEH)

www.deh.gov.au

The Department of the Environment and Heritage advises the Australian Government on policies and programs to protect and conserve the environment, including natural and cultural heritage places. It also manages several major programs, the most significant of which come under the umbrella of the Natural Heritage Trust.

The department administers environmental laws, including the *Environment Protection and Biodiversity Conservation Act 1999*. It is responsible for Australia's participation in several international environmental agreements.

Tel: 02 6274 1111 or Publications 1800 803 772

Fax: 02 6274 1666

E-mail: ciu@deh.gov.au

State/territory government agencies — Contact points

New South Wales

New South Wales Fisheries

Cronulla Fisheries Centre

Tel: 1300 550 474

Fax: 02 9527 8576

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

www.fisheries.nsw.gov.au

Office of Commercial Fishing

Tel: 02 9527 8411

Northern Territory

Department of Business, Industry and Resource Development — NT Fisheries

Head Office — Fisheries Group

Tel: 08 8999 2144

Fax: 08 8999 2065

E-mail: fisheries@nt.gov.au

www.fisheries.nt.gov.au

Queensland

Department of Primary Industries — Queensland Fisheries Service

DPI Call Centre

Tel: 13 25 23 or 07 3404 6999

Fax: 07 3404 6900

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

www.dpi.qld.gov.au/fishweb

South Australia

Primary Industries and Resources South Australia

Fisheries inquiries

Tel: 08 8347 6100

Fax: 08 8449 1646

www.pir.sa.gov.au

Aquaculture inquiries

Tel: 08 8226 0314

Fax: 08 8226 0330

Tasmania

Department of Primary Industries, Water and Environment (Fisheries)

Head Office

Tel: 03 6233 2044

Fax: 03 6234 1335

E-mail: fishing.enquiries@dpiwe.tas.gov.au

www.dpiwe.tas.gov.au

Inland Fisheries Service (Freshwater fishing and aquaculture)

Head Office

Tel: 03 6233 4140

Fax: 03 6233 4141

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

www.ifs.tas.gov.au

Victoria

Department of Primary Industries

Department of Primary Industries

Customer Service Centre

Tel: 136 186

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

www.dpi.vic.gov.au

Aquaculture inquiries:

Fisheries Division — Manager Aquaculture

Tel: 03 9412 5710

Fax: 03 9412 5770

Western Australia

Department of Fisheries

Head Office

Tel: 08 9482 7333

Fax: 08 9482 7389

E-mail: headoffice@fish.wa.gov.au

www.wa.gov.au/westfish/

ACRONYMS

AA	Approved Arrangement (AQIS approved food safety inspection system)
ABARE	Australian Bureau of Agricultural and Resource Economics
ABS	Australian Bureau of Statistics
ASIC	Australian Seafood Industry Council
AFFA	see DAFF
AFMA	Australian Fisheries Management Authority
AQA	Approved Quality Assurance
AQIS	Australian Quarantine and Inspection Service
CEPA	Closer Economic Partnership Arrangement (Hong Kong SAR and mainland China)
DAFF	Department of Agriculture, Fisheries and Forestry
DEH	Department of the Environment and Heritage
DFAT	Department of Foreign Affairs and Trade
EDN	Customs Clearance
EFIC	Export Finance and Insurance Corporation
EMDG	Export Market Development Grant Scheme
ER	Establishment Registration System
EU	European Union
EU15	15 member states of the EU until May 2004
EU25	25 member states of the EU post-May 2004
EXDOC	AQIS Electronic Export Documentation System
ICS	Customs Export Integration System
FAO	Food and Aquaculture Organisation of the United Nations
FPA	Food Processing Accreditation
FRDC	Fisheries Research and Development Corporation
GDP	Gross Domestic Product
GLOBEFISH	FAO Fisheries trade information provider
GM	Genetically modified
GMP	Good Management Practice

HACCP	Hazard Analysis and Critical Control Points
HKSAR	Hong Kong Special Administrative Region
Hong Kong SAR	Hong Kong Special Administrative Region
ISO	International Standards Organisation
ITR	Department of Industry, Tourism and Resources
MFN	Most Favoured Nation
MSC	Marine Stewardship Council
Mt	Metric tonne(s)
NOI	Notice of Intention to Export
OPA	Outward Processing Arrangement
QA	Quality Assurance
SARS	Severe Acute Respiratory Syndrome
SEW	Single Electronic Window
SSA	Seafood Services Australia
TACs	Total Allowable Catches
TID	Department of Trade and Industry Development Hong Kong SAR Government
US	United States
US\$	United States dollar
VAT	Value-Added Tax

APPENDIX 1

Mainland China edible seafood tariffs (world)

China bound tariff levels

HS	Description	Final bound rate
0301	Live fish:	
03011000	Ornamental fish	17.5
	Other live fish:	
	Trout (<i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>O. clarki</i> , <i>O. aguabonita</i> , <i>O. gilae</i> , <i>O. apache</i> and <i>O. chrysogaster</i>):	
03019110	Fry	
03019190	Other	10.5
	Eels (<i>Anguilla</i> spp.):	
03019210	Fry	
03019290	Other	10
	Carp:	
03019310	Fry	
03019390	Other	10.5
	Other:	
	Fry:	
03019911	Of perches	
03019912	Of sturgeon	
03019919	Other	
03019990	Other	10.5
0302	Fish, fresh or chilled, excluding fish fillets and other fish meat of heading No. 0304: <i>Salmonidae</i> , excluding livers and roes:	
03021100	Trout (<i>S. trutta</i> , <i>O. mykiss</i> , <i>O. clarki</i> , <i>O. aguabonita</i> , <i>O. gilae</i> , <i>O. apache</i> and <i>O. chrysogaster</i>)	
03021200	Pacific salmon (<i>O. nerka</i> , <i>Oncorhynchus gorbusha</i> , <i>O. keta</i> , <i>O. tshawytscha</i> , <i>O. kisutch</i> , <i>O. masou</i> and <i>O. rhodurus</i>), Atlantic salmon (<i>S. salar</i>) and Danube salmon (<i>Hucho Hucho</i>)	10
03021900	Other	12
	Flat fish (<i>Pleuronectidae</i> , <i>Bothidae</i> , <i>Cynoglossidae</i> , <i>Soleidae</i> , <i>Scophthalmidae</i> and <i>Citharidae</i>), excluding livers and roes:	
03022100	Halibut (<i>Reinhardtius hippoglossoides</i> , <i>Hippoglossus hippoglossus</i> , <i>H. stenolepis</i>)	
03022200	Plaice (<i>Pleuronectes platessa</i>)	
03022300	Sole (<i>Solea</i> spp.)	
03022900	Other	

HS	Description	Final bound rate
	Tunas (of the genus <i>Thunnus</i>), skipjack or stripe-bellied bonito (<i>Euthynnus</i> , (<i>Katsuwonus pelamis</i>), excluding livers and roes:	
03023100	Albacore or longfinned tunas (<i>T. alalunga</i>)	
03023200	Yellowfin tunas (<i>T. albacares</i>)	
03023300	Skipjack or stripe-bellied bonito	12
03023900	Other	12
03024000	Herrings (<i>Clupea harengus</i> , <i>C. pallasii</i>), excluding livers and roes	12
03025000	Cod (<i>Gadus morhua</i> , <i>G. ogac</i> , <i>G. macrocephalus</i>), excluding livers and roes	12
	Other fish, excluding livers and roes:	
03026100	Sardines (<i>Sardina pilchardus</i> , <i>Sardinops</i> spp.), sardinella (<i>Sardinella</i> spp.), brisling or sprats (<i>Sprattus Sprattus</i>)	12
03026200	Haddock (<i>Melanogrammus aeglefinus</i>)	12
03026300	Coalfish (<i>Pollachius virens</i>)	12
03026400	Mackerel (<i>Scomber scombrus</i> , <i>S. australasicus</i> , <i>S. japonicus</i>)	12
03026500	Dogfish and other sharks	
03026600	Eels (<i>Anguilla</i> spp.)	12
	Other:	
03026910	Scabber fish (<i>Trichurius</i>)	12
03026920	Yellow croaker (<i>Pseudosicaena</i>)	12
03026930	Butterfish (<i>Pamus</i>)	12
03026990	Other	12
03027000	Livers and roes	
0303	Fish, frozen, excluding fish fillets and other fish meat of heading No. 0304:	
03031000	Pacific salmon (<i>O. nerka</i> , <i>Oncorhynchus gorbucha</i> , <i>O. keta</i> , <i>O. tshawytscha</i> , <i>O. kisutch</i> , <i>O. masou</i> and <i>O. rhodurus</i>), excluding livers and roes	10
	Other salmonidae, excluding livers and roes:	
03032100	Trout (<i>S. trutta</i> , <i>O. mykiss</i> , <i>O. clarki</i> , <i>Oncorhynchus aguabonita</i> , <i>O. gilae</i> , <i>O. apache</i> and <i>O. chrysogaster</i>)	
03032200	Atlantic salmon (<i>S. salar</i>) and Danube salmon (<i>H. Hucho</i>)	10
03032900	Other	10
	Flatfish (<i>Pleuronectidae</i> , <i>Bothidae</i> , <i>Cynoglossidae</i> , <i>Soleidae</i> , <i>Scophthalmidae</i> and <i>Citharidae</i>), excluding livers and roes:	
03033100	Halibut (<i>Reinhardtius hippoglossoides</i> , <i>H. Hippoglossus</i> , <i>H. stenolepis</i>)	10
03033200	Plaice (<i>P. platessa</i>)	12
03033300	Sole (<i>Solea</i> spp.)	12
03033900	Other	10

HS	Description	Final bound rate
	Tunas (of the genus <i>Thunnus</i>), skipjack or stripe-bellied bonito (<i>E. (Katsuwonus) pelamis</i>), excluding livers and roes	
03034100	Albacore or longfinned tunas (<i>T. alalunga</i>)	
03034200	Yellowfin tunas (<i>T. albacares</i>)	
03034300	Skipjack or stripe-bellied bonito	
03034900	Other	
03035000	Herrings (<i>C. harengus</i> , <i>C. pallasii</i>), excluding livers and roes	10
03036000	Cod (<i>G. morhua</i> , <i>G. ogac</i> , <i>G. macrocephalus</i>), excluding livers and roes	10
	Other fish, excluding livers and roes:	
03037100	Sardines (<i>Sardina pilchardus</i> , <i>Sardinops</i> spp.), sardinella (<i>Sardinella</i> spp.), brisling or sprats (<i>S. sprattus</i>)	12
03037200	Haddock (<i>M. aeglefinus</i>)	12
03037300	Coalfish (<i>Pollachius virens</i>)	12
03037400	Mackerel (<i>S. scombrus</i> , <i>S. australasicus</i> , <i>S. japonicus</i>)	10
03037500	Dogfish and other sharks	
03037600	Eels (<i>Anguilla</i> spp.)	12
03037700	Sea bass (<i>Dicentrarchus labrax</i> , <i>D. punctatus</i>)	12
03037800	Hake (<i>Merluccius</i> spp., <i>Urophycis</i> spp.)	12
	Other:	
03037910	Scabber fish (<i>Trichurius</i>) (See Note 1)	10
03037920	Yellow croaker (<i>Pseudosciaena</i>) (See Note 1)	10
03037930	Butterfish (<i>Pamus</i>) (See Note 1)	10
03037990	Other (See Note 1)	10
03038000	Livers and roes	10
0304	Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen:	
03041000	Fresh or chilled	12
03042000	Frozen fillets	10
03049000	Other	10
0305	Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process; flours, meals and pellets of fish, fit for human consumption:	
03051000	Flours, meals and pellets of fish, fit for human consumption	10
03052000	Livers and roes, dried, smoked, salted or in brine	10
03053000	Fish fillets, dried, salted or in brine, but not smoked	10

HS	Description	Final bound rate
	Smoked fish, including fillets:	
03054100	Pacific salmon (<i>O. nerka</i> , <i>O. gorbuscha</i> , <i>O. keta</i> , <i>O. tschawytscha</i> , <i>O. kisutch</i> , <i>O. masou</i> and <i>Oncorhynchus rhodurus</i>), Atlantic salmon (<i>S. salar</i>) and Danube salmon (<i>H. Hucho</i>)	14
03054200	Herrings (<i>C. harengus</i> , <i>C. pallasii</i>)	16
03054900	Other	14
	Dried fish, whether or not salted but not smoked:	
03055100	Cod (<i>G. morhua</i> , <i>G. ogac</i> , <i>G. macrocephalus</i>)	16
	Other:	
03055910	Pipefish and hippocampi	
03055920	Sharks' fins	15
03055990	Other	16
	Fish, salted but not dried nor smoked and fish in brine:	
03056100	Herrings (<i>C. harengus</i> , <i>C. pallasii</i>)	16
03056200	Cod (<i>G. morhua</i> , <i>G. ogac</i> , <i>G. macrocephalus</i>)	16
03056300	Anchovies (<i>Engraulis</i> spp.)	16
	Other:	
03056910	Scabber fish (<i>Trichurus</i>)	16
03056920	Yellow croaker (<i>Pseudoscaena</i>)	16
03056930	Butterfish (<i>Pamus</i>)	16
03056990	Other	16
0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; crustaceans, in shell, cooked by steaming or by boiling in water, whether or not chilled, frozen, dried, salted or in brine; flours, meals and pellets of crustaceans	
	Frozen:	
03061100	Rock lobster and other sea crawfish (<i>Palinurus</i> spp., <i>Panulirus</i> spp., <i>Jasus</i> spp.)	10
03061200	Lobsters (<i>Homarus</i> spp.)	10
	Shrimps and prawns:	
	Shrimps:	
03061311	Shelled	8
03061312	Northern Pandalus (<i>Pandalus</i>)	5
03061319	Other	5
	Prawns:	
03061321	Shelled	8
03061329	Other	5

HS	Description	Final bound rate
	Crabs:	
03061410	Swimming crabs	10
03061490	Other	10
	Other, including flours, meals and pellets of crustaceans, fit for human consumption:	
	Freshwater crawfish:	
03061911	Shelled	16
03061919	Other	16
03061990	Other	16
	Not frozen:	
	Rock lobster and other sea crawfish (<i>Palinurus</i> spp., <i>Panulirus</i> spp., <i>Jasus</i> spp.):	
03062110	For cultivation	
03062190	Other	15
	Lobsters (<i>Homarus</i> spp.):	
03062210	For cultivation	
03062290	Other	15
	Shrimps and prawns:	
03062310	For cultivation	
	Other:	
03062391	Prawns, fresh or chilled	15
03062399	Other	12
	Crabs:	
03062410	For cultivation	
	Other:	
03062491	Freshwater crabs, live	14
03062492	Swimming crabs	14
03062499	Other	14
	Other, including flours, meals and pellets of crustaceans, fit for human consumption:	
03062910	For cultivation	
03062990	Other	14
0307	Molluscs, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; aquatic invertebrates other than crustaceans and molluscs, live, fresh, chilled, frozen, dried, salted or in brine; flours, meals and pellets of aquatic invertebrates	
	Oysters:	
03071010	For cultivation	
03071090	Other	14

HS	Description	Final bound rate
	Scallops, including queen Scallops, of the genera <i>Pecten</i> , <i>Chlamys</i> or <i>Placopecten</i> :	
	Live, fresh or chilled:	
03072110	For cultivation	
03072190	Other	14
03072900	Other	14
	Mussels (<i>Mytilus</i> spp., <i>Perna</i> spp.):	
	Live, fresh or chilled:	
03073110	For cultivation	
03073190	Other	14
03073900	Other	14
	Cuttle fish (<i>Sepia officinalis</i> , <i>Rossia macrosoma</i> , <i>Sepiola</i> spp.) and squid (<i>Ommastrephes</i> spp., <i>Loligo</i> spp., <i>Nototodarus</i> spp., <i>Sepioteuthis</i> spp.):	
	Live, fresh or chilled:	
03074110	For cultivation	
03074190	Other	12
03074900	Other	12
	Octopus (<i>Octopus</i> spp.):	
03075100	Live, fresh or chilled	17
03075900	Other	17
	Snails, other than sea snails:	
03076010	For cultivation	
03076090	Other	14
	Other, including flours, meals and pellets of aquatic invertebrates other than crustaceans, fit for human consumption:	
	Live, fresh or chilled:	
03079110	For cultivation	
	Other:	
03079191	Abalone	14
03079199	Other	14
	Other:	
03079910	Abalone	10
03079920	Sea cucumbers (beches-de-mer)	10
03079990	Other	10

APPENDIX 2

Mainland China seafood tariffs for Hong Kong under the CEPA

Closer Economic Partnership Arrangement (CEPA)

Hong Kong SAR-origin seafood products for implementation of zero import tariff by the mainland (goods under current production)

Mainland 2004 tariff codes	Product description	Mainland 2004 MFN tariff rates	Mainland 2005 tariff rates under CEPA
03019991	Live tilapias	10.5	0
03019999	Other live fishes	10.5	0
03023200	Fresh or chilled yellowfin tunas	12	0
03026500	Fresh or chilled dogfish and other sharks	12	0
03026600	Fresh or chilled eels	12	0
03026910	Fresh or chilled scabber fish	12	0
03026920	Fresh or chilled yellow croaker	12	0
03026930	Fresh or chilled butterfish	12	0
03026990	Fresh or chilled other fishes	12	0
03034400	Frozen bigeye tunas, excluding livers and roes	12	0
03037910	Frozen scabber fish	10	0
03037920	Frozen yellow croaker	10	0
03037930	Frozen butterfish	10	0
03037990	Other frozen fishes	10	0
03061311	Frozen shrimps, shelled	8	0
03061312	Frozen northern pandalus	5	0
03061319	Other frozen shrimps	5	0
03061321	Frozen prawns, shelled	8	0
03061329	Other frozen prawns	5	0
03062190	Rock lobsters and other sea crawfish, not frozen	18.3	0
03062290	Lobsters, not frozen	15	0
03062391	Fresh or chilled prawns	15	0
03062399	Other shrimps and prawns, not frozen	15	0
03062492	Swimming crabs, not frozen	14	0
03062499	Other crabs, not frozen	14	0
03062990	Other crustaceans, whether in shell or not, not frozen	14	0
03071090	Other oysters	14	0
03072190	Other live, fresh or chilled scallops	14	0
03073190	Other live, fresh or chilled mussels	14	0
03074190	Other live, fresh or chilled cuttle fish and squid	12	0
03074900	Other cuttle fish and squid, frozen, dried, salted or in brine	12	0
03075100	Live, fresh or chilled octopus	17	0
03075900	Other octopus, frozen, dried, salted or in brine	17	0
03079191	Live, fresh or chilled abalone	19.2	0
03079192	Live, fresh or chilled clam worm	14	0
03079199	Other live, fresh and chilled molluscs and aquatic invertebrates	14	0
03079910	Abalone, frozen, dried, salted or in brine	15	0

Mainland 2004 tariff codes	Product description	Mainland 2004 MFN tariff rates	Mainland 2005 tariff rates under CEPA
05080090	Shell or bone of coral, molluscs, crustaceans or echinoderms	12	0
16041400	Prepared or preserved tunas and skipjack, whole or in pieces, but not minced	5	0
16041910	Prepared or preserved river eel, whole or in pieces, but not minced	12	0
16041920	Prepared or preserved tilapias, whole or in pieces, but not minced	12	0
16041990	Other prepared or preserved fish, whole or in pieces, but not minced	12	0
16042010	Prepared or preserved fish in airtight containers	12	0
16042090	Other prepared or preserved fish	12	0
16051000	Prepared or preserved crab	8.3	0
16052000	Prepared or preserved shrimps and prawns	5	0
16053000	Prepared or preserved lobster	8.3	0
16059010	Prepared or preserved jelly fish	15	0
16059090	Other prepared or preserved molluscs and other aquatic invertebrates	8.3	0
71161000	Articles of natural or cultured pearls	35.0	0
03033100	Frozen halibut	10	0
03037600	Frozen eels	12	0
03037700	Frozen sea bass	12	0
03041000	Fresh or chilled fish fillets and other fish meat	15	0
03042010	Frozen fish fillets of tilapia	13.3	0
03042090	Other frozen fish fillets	13.3	0
16030000	Extracts and juices of meats or aquatic products	23.6	0

