



**Agri-Food
COUNTRY PROFILE**

AUSTRALIA

March 2003



Canada

Australia

AGRI-FOOD COUNTRY PROFILE

February 2003

Executive Summary

- Australia has a steadily growing economy which has maintained low inflation and interest rates and competitive investment terms.
- Australia's GDP is expected to reach 3% in 2003.

Canada - Australia

- Total bilateral trade between Canada and Australia in 2002 was valued at \$268 billion.
- Total agricultural bilateral trade was valued at \$676.7 million.
- Canada exported over \$91 million worth of agricultural products to Australia in 2002.
- Canada's exports to Australia in 2002 were dominated by frozen swine cuts, unmanufactured tobacco, swine offal, whiskies, and rape & colza seed.
- Canada's agricultural exports were dominated by consumer goods with a value of \$81.7 million.
- Agri-food imports from Australia in 2002 were valued at \$585.6 million.

The Government of Canada has prepared this report based on primary and secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information. This report is intended as a concise overview of the market for those interested in its potential and is not intended to provide in-depth analysis which may be required by the individual exporter.

Australia

COUNTRY PROFILE

Economy

Australia has a prosperous economy with an abundance of natural resources and a GDP per capita rate that rivals West European economies. It has a well developed and diverse market with demand in many sectors of a affluent consumer society. Australia is a steadily growing economy which has maintained low inflation and interest rates and competitive investment terms.

Overview

The global economic slowdown of 2001 affected the Australian economy only slightly with domestic demand offsetting lower export levels. The Australian governments emphasis on reforms has created higher consumer confidence and strengthened the economy which outperformed its major trading partners in 2002. The business cycle in Australia tends to lag about six months behind North America, therefore a small downturn may occur particularly if its trade position declines.

Gross Domestic Product	
GDP	US\$528 billion (2002)
GDP growth	3.6% (2002),3% (2003)
GDP per capita	US\$27,000(2002)
GDP by Sector	
Services	72%
Industry	25%
Agriculture	3%

Most of the population lives along the coastline in large urban areas like Sydney or Melbourne. Its society is becoming more multi-cultural like Canada with new immigrants from Southern and Eastern Europe, the Middle East, Latin America and Asia

having a greater cultural influence. This provides the opportunities for niche markets to be developed as the Australian economy may be hurt by drought conditions affecting the agricultural sector.

The introduction of the GST (Goods and Services Tax) has made its way through the economy with the Consumer Price Index rising slightly, but inflation rates have returned to pre-GST levels.

Current situation

Reforming of the taxation system has dominated government policy since 2000 with the introduction of the GST which replaced a complex system of sales taxes. Individual tax rates have been reduced for all income levels and corporate tax rates cut by 6%. Other reforms to business taxation are on hold as the government focuses on reform of the welfare system and superannuation.

There is concern that government budget forecasts could be impaired by increased spending on defense and security. The inflation rate is expected to remain around 2.8% for 2003 due to higher food prices caused by drought and higher oil prices.

Government Role In the Economy

A reorientation of the economy over the past 15 years has transformed it from import-substitution to an internationally competitive and export-oriented economy. Major reforms include tariff elimination and other protective barriers, floating the Australian dollar exchange rate, and deregulation of the financial services sector.

Greater integration between federal and state economies, improved infrastructure and privatization of many government services have taken place to make Australia a competitive player on world markets and increase the diversification of the economy from farm and mineral commodity based to more value-added manufactured products, services and technology.

The Australian government has been successful in implementing these reforms, making it one of the fastest growing economies of the past decade.

Forecast

Real GDP growth is expected to slow to 3% in 2003 as export growth will fall short of covering moderate levels of expansion in domestic demand. Stronger demand for exports and a rebound in agriculture are expected to increase real GDP to 3.5% in 2004. A strong Australian dollar is forecast to curb inflationary pressures over the coming fiscal year, with average annual inflation of 2.7% being forecast.

Consumer Market

The Australian consumer market is diverse and highly sophisticated with an interest towards new food products and greater after sales service. Australia's population is becoming increasingly multi-cultural as the traditional Anglo-Celtic are being joined by immigrants from Eastern and Southern Europe, Latin America, Middle East and Asia. With such an increasingly multi-cultural society allows many opportunities for ethnic food products.

Value-added products and the use of innovative packaging can make enormous difference in the marketing of food products. Major Australian importers visit North America at least once per year to examine new products and place orders. Consumer-ready products dominate the imported food market, particularly those that are fast foods and "take away" foods.

GDP per capita was valued at US \$27,000 in 2002, and per capita food expenditure was valued at US \$1,415. In the later half of 2002, consumer confidence increased by 8.7% over 2001, and the consumer price index rose by 3.1% over 2001. In addition to this, the inflation rate has returned to its 2-3% Reserve Bank of Australia target level. This relief in inflation levels was partly due to the diminishment of the effects that occurred as a result of the GST introduction.

Australia's consumers are well educated and affluent with an interest in new-to-market food products. Interest in healthy and convenient goods is highest. Consumers have evolved passed the simple avoidance of fat and sugar, as they now seek products that deliver positive, functional, and nutritional benefits, such as those products that decrease the risk of disease and promote physical and mental well being.

Australian consumers shopping patterns are changing as consumers are making more frequent, but shorter, trips to the supermarket. Trips are shorter for various reasons, one of the main reasons being that consumers have less free time to shop. With the lack of free time, it is no surprise that the frozen ready-meal market is expanding in home meal replacement as it has increased by 28% in 2002. Furthermore, newer varieties and greater nutritional value have helped shift consumers towards frozen meals, and away from fast take-away foods.

As well, shoppers are browsing less, instead they opt for the hit-and-run approach at the local supermarket. Roughly 10% of consumers shop daily, this represents a 2% increase since 1998. While 48% of consumers are shopping between two to three times a week. Many supermarkets have reported a significant increase in consumer traffic between 4pm- 6pm, the traditional dinner hour. Purchases by these consumers show a noticeable trend towards ready-made meals and home meal replacements.

Demographics		2002
Total Population		19.5 million
Population Growth Rate		0.96%
Breakdown by Age		
0-14 yrs		20.4%
15-64 yrs		67.0%
65 yrs and over		12.6%
Life Expectancy		
Male		77 years
Female		83 years
Total		80 years

Geography

Australia is an island continent bordered by the Indian and South Pacific Oceans and located just beneath Indonesia and Papua-New Guinea. It is sixth largest country in the world with a land mass of 7.7 million sq. kilometers. The population is highly urbanized with only 15% residing in rural areas. The rest of the populations is concentrated along its coastline in the states of Queensland, New South Wales and Victoria.

Major Cities	
Sydney	4.0 million
Melbourne	3.5 million
Brisbane	1.6 million
Perth	1.3 million
Canberra	0.3 million

The climate is arid to semi-arid in the interior, better known as the 'outback', while the south and eastern regions are temperate and north is tropical.

Natural resources are high, providing export revenues to the economy. Australia's major resources include bauxite, coal, iron ore, copper, tin, gold, silver, uranium, nickel, tungsten, mineral sands, lead, zinc, diamonds, natural gas and petroleum.

Infrastructure

Australia's infrastructure is highly developed and is comparable to North America and Western Europe. Air, road, rail, port and telecommunications networks are presently under further development due to population growth. The economic downturn in Asia has not affected infrastructure development.

The Australian government has undertaken privatization of many government owned facilities to create a more competitive supply and distribution system. The transportation system has undergone major upgrades and maintenance, especially to the urban road system. The 2000 Olympic Games stimulated growth and the need for a more efficient transportation infrastructure.

The private sector has stepped forward to meet the challenge of privatization and the creation of a national infrastructure system. Airlines have reduced airfares and increased customer service and competition.

Australia is a major player in the marine transport industry with modern, deep-water ports. As a trade-dependent country, almost 98% of all imports arrive by sea and is served all major shipping lines. Major ports are located in Melbourne, Sydney, Brisbane, Adelaide and Fremantle.

While the majority of goods are transported by road in Australia, new rail lines and upgrade to the existing system are providing greater competition. Rail assets are presently being sold by the government to the private sector for greater efficiency amongst the various state rail lines.

Distribution and Sales Channels

Australia has an extensive distribution system and sales channels which are comparable to those in Canada. Direct sales, use of an agent or distributor, and direct investment are the most common sales channels in Australia. There is no

import licensing applied to imported goods. The use of an agent/distributor is key to success fully marketing consumer-ready foods. Canadian exporters may also consider aligning themselves with other well known products that have already penetrated the market and obtained a specific market share.

Products that meet the strict food standards and labeling requirements of the Australia Food Standards Code will most likely have success in the market.

Modern, large-scale supermarkets are the main retail distribution channel in Australia. These outlets focus on providing high profile brand advertising with in-store promotions. Importers generally prefer to deal directly with the Canadian manufacturers rather than brokers, and use of local agents/distributors can be beneficial in facilitation and promotion of Canadian consumer-ready foods.

General Merchandise Trade

Over the past decade, exports of Australian goods have increase by almost 50% to US\$65 billion in 2002. The recent decline in growth levels is due to lower demand from East Asia and a fall in world commodity prices. Imports reached US\$ 69.5 billion in 2002, an increase of US\$9.5 billion over the previous year. The rise in Australia's trade deficit can be explained by increased domestic consumption fuelled by the country's economic growth.

Over 56% of Australia's exports are primary products, but there has been a steady shift towards manufactured products. Imports are dominated by manufactured products which make up 86% of exports, and this figure changed little over the past decade.

Australia's major export markets are Japan and the Asian NICs (Newly Industrialized Countries which include South Korea, Taiwan, Hong Kong and Singapore). Other major exports markets include the United States, European Union, ASEAN (Association of Southeast Asian Nations) and New Zealand.

Leading import suppliers are the United States, Japan and China followed by the European Union and New Zealand. It is with these countries that Australia maintains a trade surplus while experiencing a deficit with the rest of the world.

Trade Agreements

Australia plays a very active role in international trade policy initiatives with its strongest relationship being with neighboring New Zealand. The two countries enjoy free movement of goods due extensive free trade agreements.

Australia is a member of the Cairns Group, which is a gathering of agricultural net-exporters which lobby collectively for free and fair trade. Canada is also a member of this group.

Australia has strong trading relationships with its Asia Pacific neighbors, with whom it is linked through membership in the Asia-Pacific Economic Cooperation (APEC) forum. The Australian government is currently negotiating a trade agreement with Singapore and with the United States.

Australia's participation in international organizations includes: ANZUS, APEC, AsDB, ASEAN, Australia Group, BIS, CANATA, CCC, CP, EBRD, ESCAP, FAO, IAEA, IBRD, ICAO, ICC, ICFTU, ICRM, IDA, IEA, IFAD, IFC, IFRC, IHO, ILO, IMF, IMO, Inmarsat, Intelsat, Interpol, IOC, IOM, ISO, ITU, NAM (guest), NEA, NSG, OECD, OPCW, PCA, Sprteca, SPC, SPF, UN, UNCTAD, UNESCO, UNFIYP, UNHCR, UNITAR UNTAET, UNTSO, UNU, UPU, WFTU, WHO, WIPO, WMO, WTO, WtrO and ZC.

The Darwin Trade Development Zone (TDZ) located in northern Australia are to foster greater trading relationships with regional neighbours and their export processing zones, particularly Indonesia. A significant number of manufacturing industries have been established in the TDZ and a new zone has been created at Newcastle

which is also in northern Australia. Exporters do not have to pay up-front customs, excise or sales taxes on imported materials. Only if the goods are removed for sale or use in Australia are they subject to duties and taxes.

Investment

The Australian Government's National Investment Agency, promotes inward investment into Australia, particularly for telecommunications and other high-technology areas. The government has recently widened its program to include manufacturing, agriculture and financial services.

There are no prohibitions on overseas investment or capital repatriation and the Australian government does not provide direct tax incentives for investment in the country. Other incentives are available and are applied equally to domestic and foreign investors. Several multinational corporations have received beneficial packages from the government for locating their regional headquarters in Australia.

Market Access

Canadian exporters will find that entering the Australian market does provide some advantages. Both Canada and Australia have similar cultures, same language and Canadian products have an excellent image and are easily accepted.

Importation of agri-food products must comply with all Australian laws which are designed to foster public health protection and assist consumers. These laws are applied equally towards domestic and imported goods. The federal government is responsible for certification and clearance of foods being imported to Australia which covers quarantine and imported food inspection clearance.

Market entry strategies for Canadian firms are straightforward. They include exporting of products and services through the use of agents or license/technology transfers, franchise arrangements, joint ventures, strategic alliances and wholly-owned subsidiaries/branches. As Australia restructures

economically, there are significant opportunities to participate in major public-funded projects. There also exist opportunities to win major infrastructure and services projects made available through public sector divestment and privatization.

The Australian Quarantine and Inspection Service (AQIS) provides information for importers of items that require a health certificate or quarantine in Australia.

The Australian Food Standards Code is maintained by the Australia New Zealand Food Authority which facilitates policy development for food safety conditions.

Some food items may be prohibited and the exporter should contact AQIS to determine if their product is prohibited or facing some kind of restriction. Previously, Australia had a ban on imports of poultry meat and cooked pork products. These products are now permitted into Australia under specific quarantine restrictions. Other products such as feed grains and fresh fruits face highly restrictive regulations making them unviable for import. Canadian exporters should analyze the Australian market as restrictions and requirements for various products are currently under revision.

Tariffs

As part of Australia's tariff reduction program, 41% of tariff lines have been reduced to zero, while another 35% of tariff lines have been reduced to 5% or lower.

Most tariffs on imported agri-food products are relatively low. Tariffs are calculated as a proportion of the value for duty (ad valorem). Canadian exporters may be able to claim tariff relief if the goods being imported into Australia have no domestically produced substitute. The Australian Customs Service will waive any duties payable on consumer goods, and require a 3% concessional duty be paid on 'other goods'.

Value Added Tax

Consumers will bear the cost of the GST, not the business providing the goods and services. However, the liability to pay GST to the Australian Taxation Office (ATO) rests on the supplier of the goods and services, not on their customer. Therefore, even if an agent does not include GST into the final price, they will be liable to pay it to the Australian Taxation Authority (ATO).

As part of this major reform of the Australian taxation system, all Australian companies which earn revenues in excess of AU\$50,000 need to have an Australian Business Number (ABN) and be registered for GST. Canadian companies who have an Australian distributor will not be required to have an ABN.

Overseas entities, making taxable supplies for use in Australia will need to have an Australian business number and be registered for GST even though the enterprise may not be carried on in Australia. This is also the case for Canadian companies who make direct exports to Australian customers.

Wine Equalization Tax

The Wine Equalization Tax is generally calculated at 29% of the purchase price at inwards duty free. The tax applies to the following alcoholic beverages:

- Grape wine, including sparkling wine and fortified wine
- Grape wine products such as marsala, vermouth, wine cocktails and creams
- Other fruit wines and vegetable wines, including fortified fruit wines and vegetable wines
- Cider and sherry
- Mead and sake, including fortified mead

Certification Requirements

All food imported into Australia must comply with Australian quarantine requirements by obtaining a quarantine import permit. A copy of the permit

should accompany the products in a envelope on the side of the parcel. Goods will be released upon confirmation that conditions on the permit have been met.

The following list of foods are likely to require extensive risk quarantine analysis:

- Fresh or frozen raw red or white meats including poultry meat
- Some fresh or frozen marine products
- Raw or lightly processed egg products
- Raw or lightly processed dairy products
- Many fresh fruits
- Many fresh grains
- Honey and some apiary products

Foods that are less likely to require extensive risk quarantine analysis:

- Pasta and noodles (non-egg) products
- Canned fruit and vegetables
- Sauces not containing meat and eggs
- Some tropical fruits
- Confectionary
- Jams and preserves
- Processed nuts
- Biscuits
- Spices
- Some dried foods (not meat)
- Coffee, tea and cocoa
- Drinks including juices
- Processed rice
- Some processed grains
- Many marine products canned and fresh
- Some vegetables
- Oils

For detailed information on quarantine and food inspection requirements, Canadian exporters should contact the Australian Quarantine Inspection Service (AQIS).

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf must first be notarized in Canada. At no

cost to the exporter the notarized documents can be authenticated by sending them to:

Department of Foreign Affairs and International Trade - Authentication and Service of Documents (JLAC)
125 Sussex Drive, Ottawa, K1A 0G2
Telephone: (613) 992-6602
Facsimile: (613) 992-2467

Shipping Documentation

All shipping documents must be presented to customs officials by the importer or their agent upon the entry of goods into Australia. The following documents are mandatory:

Packing List: one copy is to be enclosed in the package and a second copy submitted with other documentation. The packing list must contain full descriptions of all items in the shipment.

Documents from seller: must correspond exactly with the import permit. The slightest change may make the import permit invalid.

Commercial Invoice: must be signed and issued by the seller. Three copies must be certified by the chamber of commerce of which they retain one copy. The two other copies of the invoice and certificates of origin will then be legalized.

Certificates of Origin: certified by a chamber of commerce and presented to the Australian Consulate. Method of payment must be shown on the certificate. If this is not by a letter of credit, then this must be slated. If a letter of credit is used, then the credit number must appear and a copy of credit must be attached. The following is also to be included in the certificate of origin:

- description of goods;
- quantities;
- value;
- name and address of importer;
- name and address of exporter;
- marks and number;
- name of carrier, etc.

Packaging and Labelling

All imported food products should have English labels. Labels require the following inscriptions:

- Product name: the product name should be identical to the product name declared on the licensing/inspection authority
- Product type: by classification code as stated in the Australian National Food Code, if no classification, product kind should be noted
- Importer's business license number, name, address, and address where defective products may be returned.
- Date of Manufacture: Mandatory only for specific products such as sugar.
- Date of Expiry / Shelf life: Food products should identify shelf life in accordance with the Australian National Food Code.
- Content (weight, volume, number of pieces) all should be indicated in parentheses.
- Ingredients: All ingredients should be listed with percentage content in descending order.
- Other items such as cautions as designated by detailed labelling standards for food use or preservation. Any products that must be kept at low temperature, must be clearly indicated.

A wide range of changes to labelling standards has been introduced by the Australia New Zealand Food Safety Authority. Livestock products, food additives, container and packaging for food products all have labelling standards set separately.

Import Licenses

Australian Customs does not require companies or individuals to hold licenses to import goods. However, depending on the nature of the commodity, permits may be required to clear the goods.

Temporary Entry

Products entering Australia for a temporary period may be imported duty-free if they are to be used for promotional purposes in a trade show that has been certified by the Australian Customs Service.

Canadian exporters requiring further information on Australian customs requirements may wish to review the [‘Customs Guide to Importing and Exporting’](#) (PDF File) by the Australian Customs Service.

Market Constraints

Australia has stringent phytosanitary restrictions affecting imports of fresh fruit and vegetables and other requirements affecting imports of meat and poultry products. The subject of a WTO complaint, phytosanitary barriers to the importation of fresh and frozen salmon are under review. A ban on importation of cooked chicken is still under review.

Other challenges that may be faced by Canadian exporters are the number of multinational firms which have branch plants in Australia and major competitors such as the United States and regional players such as China, Japan and Indonesia.

Agriculture And Agri-food Overview and Outlook

Australian agriculture is a major industry, accounting for 58% of all goods and services exported, but represents less than 5% of GDP. The comparative advantage of Australia is its small domestic market and climate allowing its economy to focus heavily on exports. The agricultural industry is subject to fluctuations in world prices of major commodities and weather patterns such as severe droughts affecting levels of production.

The agricultural workforce is estimated to be 3.6% of the population with 54% of farming operations located in inland Australia. Farm incomes are expected to decline from the effects of drought and profits to fall even further than incomes as stocks of grain and

livestock are reduced. This will diminish cash flow generation after the drought season has passed.

Overall the agricultural sector has remained relatively stable for the past two years with certain products outperforming others due to weather conditions, world prices and a weak Australian dollar. Farm production reached \$38.4 billion at end of the 2001/02 fiscal year with agricultural exports contributing \$31.1 to the economy over the same period. A decrease of 21% is forecast for the 2002/03 fiscal year due to lower crop production and falling livestock prices.

On a more positive note, there has been a marked increase in the level of diversification and intensification of production. This change can be attributed to evolving consumer preferences, better handling, storage and distribution systems, and improved management practices and scientific advances in breeding techniques.

Agricultural Policy

The government of Australia has adopted a policy of diversification of its farm economy and expanding its industrial base to help evade trade barriers of industrialized nations against its agricultural products. This has provided significant growth in exports of agricultural products over the past decade, and lowered inflation rates domestically.

As for the domestic market, there are a wide range of agri-food products which require pre-approval to import by the Australia New Zealand Food Safety Authority, though most trade barriers have been reduced or abolished altogether. The dismantling of domestic agricultural support programs by the government has allowed Australian farmers to compete on world markets without direct government support.

Agri-Food Import Market Competitors

The Australian agri-food market is highly competitive, not only amongst domestic products but imported goods as well. A number of multinational firms have production facilities located within the country to serve the domestic and regional markets. Some food manufacturers in Australia have moved towards consolidation and/or alliances to further their competitive advantage.

Consumer-oriented products are highly valued and there is growing competition for shelf space in major super markets. Almost 85% of food products in super markets are imported or produced by foreign multinationals within Australia. The United Kingdom and the European Union provide a large amount of value-added imports due to historic ties and matching tastes of the majority of the population. The special trade arrangements with New Zealand also make it a major competitor in the agri-food market.

Canada - Australia Trade and Investment

Canada and Australia maintain an excellent social and economic relationship highlighted by membership in key organizations such as the commonwealth and APEC. Furthermore, Canada and Australia grant each other preferential tariff rates on a number of products agreed upon under the Canada-Australia Trade Agreement (CANATA).

Australia is Canada's 16th largest export destination and 21st largest import supplier. Total bilateral trade for 2001 was \$2.68 billion.

In 2001, Canada exported \$1.07 billion worth of its exports to Australia. Canada's major exports to Australia included: motor vehicle engines, non-bovine meat, telecommunications equipment, wood, and agricultural machinery. Canada is also an important market supplier of services with total exports amounting to \$390 million in 2002. Imports from Australia for 2001 were valued at \$1.61 billion. Major imports from Australia included: aluminum, sugar, bovine meat, nickel ores, and alcoholic beverages.

Canada - Australia Bilateral Trade	
Total trade	US \$183.6 billion (2001)
Exports	US \$91.9 billion (2001)
Imports	US \$91.7 billion (2001)
Balance	US \$0.20 billion (2001)
Canada-Australia Trade	
Exports	\$1.07 billion (2001)
Imports	\$1.61 billion (2001)
Balance	-\$54 billion (2001)
Canada-Australia Ag-Trade	
Exports	\$91 million (2001)
Imports	\$585.6 million (2001)
Balance	-\$494 million (2001)

Bilateral agricultural trade between Canada and Australia was valued at \$676 million in 2002. Australia dominates the two-way trade resulting in a negative Canadian trade balance of \$494.6 million.

Canada exported over \$91 million worth of agricultural products to Australia in 2002. Canada's exports increase by roughly 14% in 2002, compared to 2001's total of \$79 million.

Exports in 2002 were dominated by frozen swine cuts and unmanufactured tobacco. Frozen swine cuts were valued at \$67.9 million while unmanufactured tobacco was valued at \$2.7 million. Swine offal, whiskies, and rape & colza seed rounded out Canada's top five agricultural exports to Australia.

Canada's agricultural exports were dominated by consumer goods with a value of \$81.7 million. Intermediate exports were valued at \$5.3 million and bulk exports were valued at \$3.9 million.

Canada's agri-food imports from Australia in 2002 were valued at \$585.6 million, an increase of roughly \$33 million over 2001. Imports were

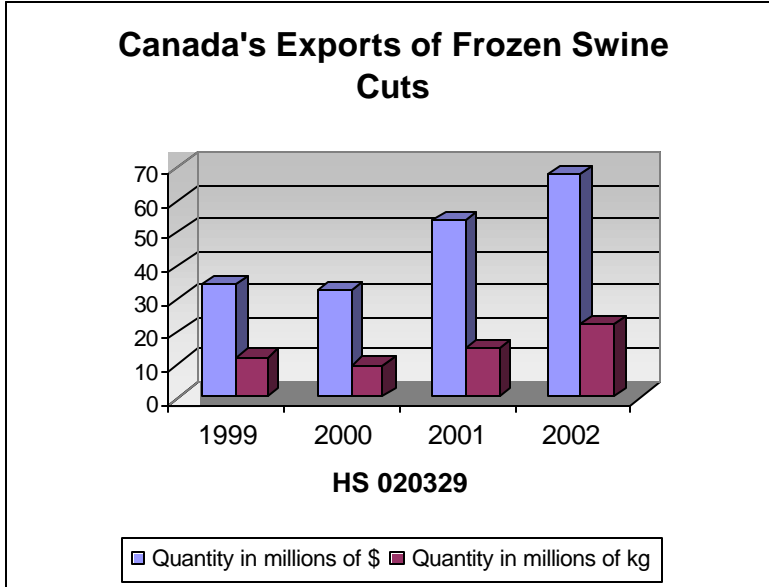
dominated by frozen, boneless, bovine cuts which made up 37% of total agri-food imports and grape wines which made 23%. Imports of boneless, fresh or chilled bovine cuts, raw sugar cane, and bone-in, fresh or chilled bovine cuts rounded out the top five imports.

There are extensive opportunities for Canadian businesses to export processed food products to Australia. Currently almost 80% of Australia's imported processed agri-food products are in final form and ready for retail sale. This large percentage has Australian companies seeking additional foreign investors to further develop the competitiveness of the domestic food processing industry.

Canadian foreign direct investment in Australia has been relatively stable over the past four years and the total commitment reached \$4.1 billion in 2001.

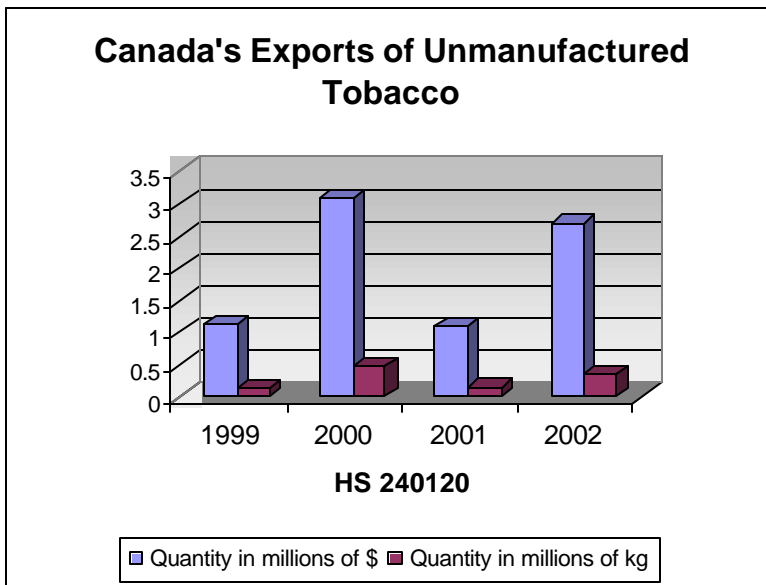
Canada's Exports to Australia

The following six products represented 82.6% of Canada's agricultural exports to Australia in 2002. Data provided by STATS Can.



Frozen swine cuts represented 74% of Canada's agricultural exports to Australia in 2002. Australia was our 3rd largest market for this product.

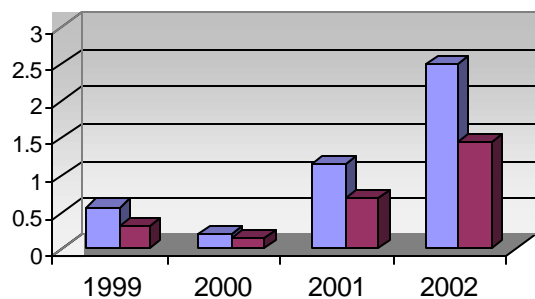
Canada exported \$67.9 million worth of its frozen swine cuts to Australia in 2002. This was roughly a 25% increase in value over 2001, and a four year high.



Unmanufactured tobacco represented 3% of Canada's agricultural exports to Australia in 2002. Australia was our 4th largest market for this product.

Canada exported \$2.7 million worth of its unmanufactured tobacco to Australia in 2002. This was roughly a 147% increase in value over 2001.

Canada's Exports of Frozen Swine Offal



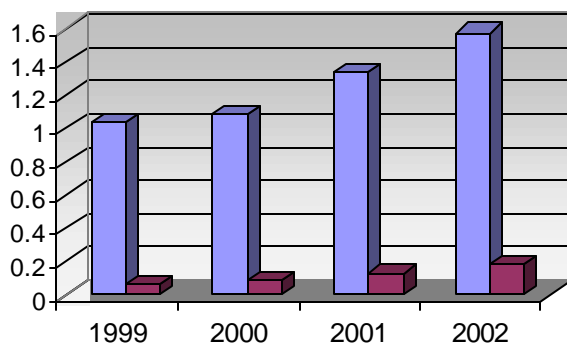
HS 020649

■ Quantity in millions of \$ ■ Quantity in millions of kg

Frozen swine offal represented 2.7% of Canada's agricultural exports to Australia in 2002. Australia was our 9th largest market for this product.

Canada exported \$2.5 million worth of its frozen swine offal to Australia in 2002. This was roughly a 114% increase in value over 2001, and a four year high.

Canada's Exports of Whiskies



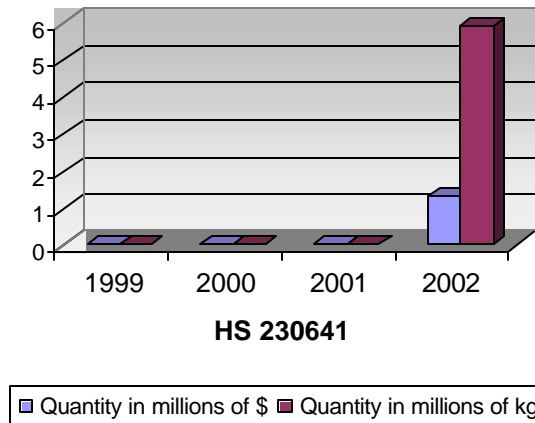
HS 220830

■ Quantity in millions of \$ ■ Quantity in millions of lpa

Whiskies represented 17% of Canada's agricultural exports to Australia in 2002. Australia was our 6th largest market for this product.

Canada exported \$1.5 million worth of its whiskies to Australia in 2002. This was roughly a 17% increase in value over 2001, and it was a four year high.

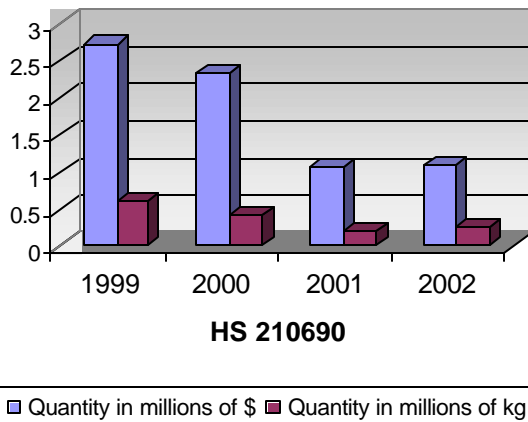
Canada's Exports of Rape & Colza Seed



Rape & Colza seed represented 1.4% of Canada's agricultural exports to Australia in 2002. Australia was our 2nd largest market for this product.

Canada exported \$1.3 million worth of its rape & colza seed to Australia in 2002.

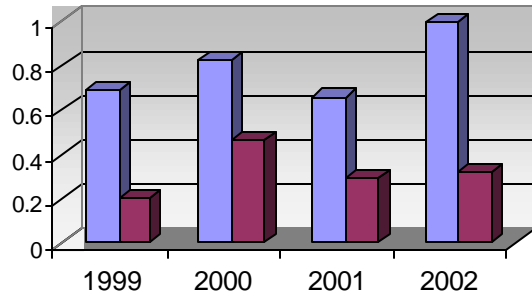
Canada's Exports of Food Preparations



Food preparation represented 1.2% of Canada's exports to Australia in 2002. Australia was our 11th largest market for this product.

Canada exported \$1.1 million worth of its food preparations to Australia in 2002. This represented a slight increase in value over 2001, and it represented a four year high.

Canada's Exports of Sauces, Preparations and Mixed Condiments



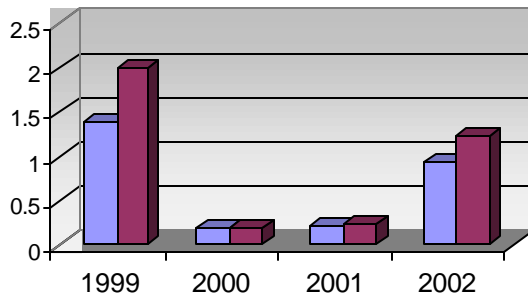
HS 210390

Quantity in millions of \$ Quantity in millions of kg

Sauces, preparations and mixed condiments represented 1% of Canada's agricultural exports to Australia in 2002. Australia was Canada's 6th largest market for this product.

Canada exported \$994,503 worth of its sauces, preparations and mixed condiments to Australia in 2002. This was roughly a 50% increase in value over 2001.

Canada's Exports of Kiney Beans and White Pea Beans



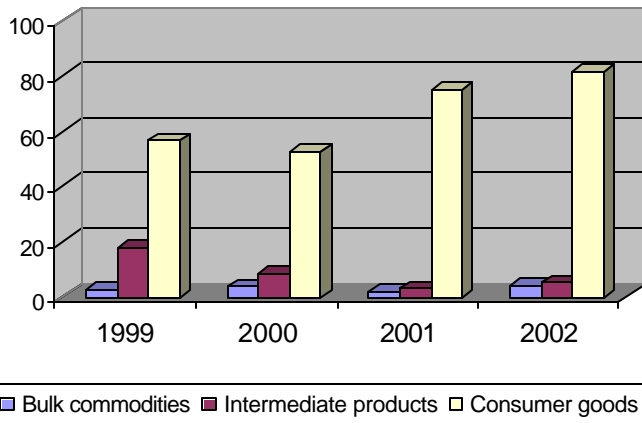
HS 071333

Quantity in millions of \$ Quantity in millions of kg

Kidney beans and white pea beans represented 1% of Canada's agricultural exports to Australia in 2002. Australia was out 12th largest market for this product.

Canada exported \$943,848 of its kidney beans and white pea beans to Australia in 2002. This was roughly a three fold increase in value over 2001.

Canada's Exports of Bulk, Intermediate and Consumer Goods



Canada's agricultural and food exports were dominated by consumer goods in 2002. Consumer goods represented more than 89% of Canada's total agriculture and food exports. Exports of consumer goods in 2002 increased by 8.8% over 2001. Intermediate products represented the second largest export category. Intermediate products increased by roughly 73.8% over 2001. Bulk commodities were the smallest export category in 2002, however, they increased in value by more than 139% over 2001.

Additional Information

Industry and Trade Associations

Australia - Canada Chamber of Commerce

201 Balsam Ave
Toronto, Ontario, M4E 3C4, Canada
Phone: 416-929-5132
Fax: 416-691-8955
E-mail: info@auscanchamber.ca
Internet: www.auscanchamber.ca

Australian Food and Grocery Council

Level 2, Salvation Army Building
2 - 4 Brisbane Ave
Barton ACT, Australia 2600
Phone: 02-6273-1466
Fax: 02-6273-1477
E-mail: info@afgc.org.au
Internet: www.afgc.org.au/

Australasian Soft Drink Association

Level 7, Bathurst St
Sydney, NSW 2000, Australia
Phone: 61-02-9283-9666
Fax: 61-02-9283-9655
E-mail: asda@softdrink.org.au
Internet: www.softdrink.org.au

ASEAN-Australia Business Council

PO Box E14
Kingston ACT 2604, Australia
Phone: 61-2-6273-2311
Fax: 61-2-6273-3196

Asia Pacific Business Association

PO Box A2163
Sydney South NSW 2000, Australia
Phone: 61-2-9235-1222
Fax: 61-2-9221-8109

Australian Biotechnology Association (ABA)

Box 7004, Gardenvale LPO
Brighton VIC 3186, Australia
Phone: 61-3-9596-8879
Fax: 61-3-9596-8874

Australian Institute of Agricultural Science and Technology

1st Fl., 91 Rathdowne Street
Carlton VIC 3053, Australia
Phone: 61-3-9662-1077
Fax: 61-3-9662-2727

Agribusiness Association of Australia

PO Box N26, Grosvenor Place
Sydney NSW, Australia 1220
Phone: 61-4-1888-0046
Fax: 61-2-9869-1537
E-mail: agri@agrifood.info
Internet: www.agribusiness.asn.au

Australian Wine and Brandy Corporation

PO Box 2733
Kent Town Business Centre
Kent Town SA 5000, Australia
Phone: 61-08-8228-2000
Fax: 61-08-8228-2022
E-mail: awbc@awbc.com.au
Internet: www.awbc.com.au

Customs Brokers & Forwarders Council of Australia, Inc.

PO Box 303
Hamilton, QLD 4007, Australia
Phone: 07-3252-1348
Fax: 07-3252-1159
E-mail: info@cbfca.com.au
Internet: www.cbfca.org.au

Australian Commercial Disputes Centre

Level 6, 50 Park Street
Sydney NSW 2000, Australia
Phone: 61-2-9267-1000
Fax: 61-2-9267-3125

Australian Retailers Association

Level 2, 20 York Street
Sydney NSW 2000, Australia
Phone: 61-2-9290-3766
Fax: 61-2-9262-1464

Council of Australian Food Technology Associations Inc.

136 Greenhill Road
Unley SA 5061
Phone: 61-8-8300-0000
Fax: 61-8-8300-0001

Australian Institute of Food Science & Technology

PO Box 319
Noble Park VIC 3174, Australia
Phone: 61-3-9580-6182
Fax: 61-3-9580-6933

Industry and Trade Associations (continued)

CSIRO Food Science Australia

PO Box 52
North Ryde NSW 1670
Phone: 61-2-9490-8333
Fax: 61-2-9490-8499
E-mail: www@foodscience.afisc.csiro.au
Internet: www.dfst.csiro.au

Food and Beverage Importers Association Inc.

181 Drummond Street
Carlton VIC 3053, Australia
Phone: 61-3-9639-3644
Fax: 61-3-9639-0638
E-mail: ajb@sprint.com.au

Standards Australia

PO Box 1055
Strathfield, NSW 2135, Australia
Phone: 61-29-746-4700
Fax: 61-29-746-8450
E-mail: research@standards.com.au
Internet: www.standards.com.au

Australian Horticultural Exporters Association

Industry Wing, Institute for Horticultural Development
Private Bag 15, Ferntree Gully Delivery Centre
Victoria 3156, Australia
Phone: 61-3-9210-9380
Fax: 61-3-6210-9381
E-mail: ahea@ahea.com.au
Internet: www.ahea.com.au

Food Industry Council of Australia (FICA)

PO Box E14
Kingston ACT 2604
Phone: 61-2-6273-2311
Fax: 61-2-6273-3286
E-mail:
Internet:

Packaging Council of Australia Inc.

GPO Box 1469N
South Melbourne VIC 3205
Phone: 61-3-9690-1955
Fax: 61-3-9690-3514
E-mail: packcoun@packcoun.com.au
Internet: www.packcoun.com.au

Australian Chamber of Commerce and Industry

PO Box 18008, Collins Street East
Melbourne VIC 3001, Australia
Phone: 61-3-289-5289
Fax: 61-3-289-5250
E-mail: [acci@acci.asn.au](mailto:acc@acci.asn.au)
Internet: www.acci.asn.au

Canada Australia New Zealand Business Association (CANZBA) c/o Australian Consulate

888 Dunsmuir Street
Vancouver, British Columbia, V6C 3K4
Phone: 604-684-1177, Ext. 333
Fax: 604-684-1856
E-mail: info@canzba.org
Internet: www.canzba.org

Canadian Contacts in Australia

Canadian High Commission

Commonwealth Ave.
Canberra ACT 2600, Australia
Phone: 02-6270-4000
General Fax: 02-6273-3285
Consular Fax: 02-6270-4081, 4060
Trade Fax: 02-6270-4069
E-mail: cnbra@dfait-maeci.gc.ca
Internet: www.dfait-maeci.gc.ca/australia

Canadian Consulate General in Sydney

Level 5, 111 Harrington St.
Sydney NSW 2000, Australia
Phone: 02-9364-3000
General Fax: 02-9364-3098
Trade Fax: 02-9364-3097
E-mail: sydney@dfait-maeci.gc.ca

Consulate of Canada in Perth

267 St. George's Terrace
Perth, West Australia 6000, Australia
Phone: 08-9322-7930
Fax: 08-9261-7706
E-mail: perth@dfait-maeci.gc.ca

Key Australian Contacts

Australian High Commission

7th Floor, Suite 710
50 O'Connor Street
Ottawa, Ontario, K1P 6L2
Phone: 613-236-0841
Fax: 613-236-4376
Internet: www.ahc-ottawa.org

Australian Consulate General, Toronto

Suite 314, 175 Bloor Street East
Toronto, Ontario, M4W 3R8
Phone: 416-323-1155
Fax: 416-323-3910
Austrade: 416-323-3909
E-mail: info@austrade.gov.au

Australian Consulate, Vancouver

Suite 1225, 888 Dunsmuir Street
Vancouver, British Columbia, V6C 3K4
Phone: 604-684-1177
Fax: 604-684-1856
Trade: Ext. 228
E-mail: info@austrade.gov.au

Department of Agriculture, Fisheries and Forestry - Australia Market Access & Biosecurity

GPO Box 858
Canberra ACT 2601, Australia
Phone: 02-6272-4199
Fax: 02-6272-4107
E-mail: marketaccess@affa.gov.au

Australia New Zealand Food Safety Authority

PO Box 7186
Canberra Mail Centre ACT 2610, Australia
Phone: 61-02-6271-2258
Fax: 61-02-6271-2278
E-mail: slo@anzfa.gov.au
Internet: www.anzfa.gov.au

Australian Quarantine and Inspection Service (AQIS)

GPO Box 858
Canberra ACT 2601, Australia
Phone: 61-02-6272-3933
E-mail: importweb@aqis.gov.au
Internet: www.aqis.gov.au

Department of Foreign Affairs and Trade

Administrative Bldg.
Parkes ACT 2600, Australia
Phone: 61-6-261-9111
Fax: 61-6-261-3111
Internet: www.dfat.gov.au

Australian Customs Service

5 Constitution Avenue
Canberra ACT 2601, Australia
Phone: 61-2-6275-6666
Fax: 61-2-6275-6005
E-mail: information@customs.gov.au
Internet: www.customs.gov.au

As of February 2003, other Country Profiles and Statistical Updates are available for the following markets:

Argentina 2001*	Australia 2001*	Brazil 2002*	Chile 2002*
Colombia 2002*	European Union 2000*	France 2002	India 2002
Indonesia 2000*	Israel 2000	Italy 2000	Japan 2003
Malaysia 2000*	Mexico 2002	Phillippines 2000*	Poland 2002
Russia 2002	South Africa 2000*	Singapore 2001*	Spain 2000
Taiwan 2000*	Thailand 2001*	Ukraine 2002	Hungary 2002
South Korea 2000*	Venezuela 2002*	Vietnam 2001*	Germany 2000*
Czech Republic 2002	United Kingdom 2001	Egypt 2001	Tunisia 2002*
Cuba 2002*	CARICOM 2002*	Mercosur 2002*	ANDEAN 2002*
Iran 2002*	Algeria* 2002		

* Statistical updates available as of December 2002.

These reports are available on the Agri-Food Trade Service (ATS) web site: <http://ats.agr.ca>
Please address any comments or suggestions you have on this report to:

Bryan West Market and Industry Services Branch Agriculture and Agri-Food Canada	Phone: (613) 759-7686 Fax: (613) 759-7505 E-mail: westb@em.agr.ca
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Ces rapports sont également disponibles en français.

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