



**2021-2031**

# **Seafood Growth Strategy for South Australia**

**Driving growth and opportunities for a  
sustainable seafood sector**



**Government  
of South Australia**



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# Message from the Minister

The 10-year Seafood Growth Strategy has been established to drive growth and opportunities for a sustainable and prosperous South Australian seafood sector.



South Australia has many natural competitive advantages for seafood production and is well positioned to be the premium seafood state of the Southern Hemisphere. South Australia's seafood sector contributes \$814.5 million to the gross state product, in addition to providing important social, cultural and economic value through recreational and Aboriginal traditional fishing. This sector is an important contributor to regional development and employment for many coastal towns and communities across South Australia.

The Government of South Australia is committed to growing our seafood industry to increase the profitability of fishing businesses, grow sustainable fish populations, and improve opportunities for recreational and Aboriginal traditional fishers.

A major step in this commitment is the transformative reform of the commercial Marine Scale Fishery, which came into effect on 1 July 2021, with the goal of strengthening the long-term financial and ecological sustainability of the industry. Included in this reform was the development of the Red Tape Reduction Working Group to ensure unnecessary red tape and costly administrative functions were not holding this sector back.

But it is not enough to just sustainably manage our fisheries, we should also be looking for opportunities to develop and grow the seafood industry for the benefit of all South Australians. To that end, in 2020 the State Government established the Seafood Advisory Forum. This forum brings together the different elements of the seafood industry: recreational fishers, commercial fishers, seafood processors, aquaculture, charter fishers, the restaurant sector and Aboriginal traditional fishers. The Seafood Advisory Forum has been tasked with developing a cohesive vision for the future and a 10 year strategic plan the growth of the South Australian seafood sector.

There are many and varied challenges affecting the management of fisheries resources. These include air freight and market disruptions, regulatory flexibility, resource allocation, climate variability, access to resources, biosecurity and industry capacity. However, there are also great opportunities for increasing demand for local product, regional and unique food experiences, technology adoption, and opportunities through aquaculture or under-utilised species. There is also the scope to secure the resource, protect key species, and develop new opportunities through flexibility and innovation.

The Seafood Growth Strategy is a plan for growth. It is driven by the vision of South Australia as a leader in premium sustainable seafood production and experiences, and underpinned by seven key pillars that will unite and cohesively support the expansion of South Australia's seafood sectors. The seven key pillars aim to bring the industry together and address issues such as access security, investment, seafood products and promotion, sustainability and R & D, capacity building, education and training of the current and future workforce, and the adoption of new technology and innovation across all areas of the value chain.

These pillars address the strategic targets and priorities required to drive the productivity gains that will support the Government of South Australia's Growth State 2030 plan, which aims to grow the gross state product by 3 per cent every year to achieve a primary industries revenue of \$23 billion by 2030.

Through the Seafood Growth Strategy, we look forward to seeing the sector contribute to this growth target.

**Hon. David Basham, MP**  
**Minister for Primary Industries and Regional Development**  
**South Australian Government**

# From the Chair

The Seafood Advisory Forum is proud to have led and coordinated the development of the Seafood Growth Strategy for South Australia, on behalf of the industry and the Government of South Australia. This establishes the sector's vision and strategic priorities for the next ten years.



In developing the 10-year Seafood Growth Strategy, common themes emerged. All forum members were keen to see the establishment of a state-based advocacy body, encompassing commercial, recreational and indigenous fisheries and aquaculture to provide a strong, independent voice that would advocate for well-maintained marinas and entry points, improved access to infrastructure and security of access.

As a sector, it was also clear that we need strong leadership. This will allow us to identify and understand new domestic and international market opportunities, and work with the State Government to develop new management and governance structures for fisheries and aquaculture that will enhance co-management, drive cost-efficiencies, and be responsive to change and new opportunities. We have also considered how we can better manage common approaches, create an investment environment, and build capacity within the sector through education and training.

To move the industry forward, the forum members agree that we need to:

- be prepared, not reactive, to address industry issues (trade, markets, biosecurity, climate)
- better engage with each other and work collaboratively to achieve common goals
- operate under strategic, adaptive and relevant policies
- explore and develop new regional, state, national and international markets for seafood products and experiences
- generate creative marketing campaigns that will increase awareness of SA's sustainable seafood industry and increase seafood consumption.

Ultimately, we are excited by the products and services the industry offers and are driven to achieve a secure, sustainable and productive resource that is underpinned by innovation, research and a skilled workforce.

The next phase is the most critical—we need to keep the momentum going, unite as an industry and work with the State Government to bring this strategy to life. The first step will be the development of a short-term operational plan. This plan will establish the priorities and activities required to implement the strategy over the next two to three years. Separate operational plans over shorter timeframes will also allow the sector to deliver on the strategy's objectives within the current environment, taking advantage of available opportunities.

We are driven by the goal of developing certainty for all stakeholders through creating a vibrant, productive, diverse and sustainable seafood sector, which provides the best quality seafood and seafood experiences.

With this strategy, we are proactively planning for success.

**Catherine Cooper**  
**Independent Chair**  
**Seafood Advisory Forum**



# The Seafood Forum

The Seafood Advisory Forum (the forum) includes seafood champions, representatives and an independent chair that developed this strategy, including:

- Independent Chair – Catherine Cooper
- Commercial fishing industry representative – Dennis Holder
- Charter fisher representative – Marilyn Nobes
- Aquaculture industry representative – Steve Bowley
- Recreational fishing representative – Mick Wilson
- Commercial fishing entrepreneurial champion – Jonas Woolford
- Recreational fishing entrepreneurial champion – Jamie Crawford
- Charter fisher entrepreneurial champion – Tomaso Di Vittorio
- Aquaculture entrepreneurial champion – Marcus Stehr
- Aboriginal traditional fishing entrepreneurial champion – Shane Holland
- Fish processor entrepreneurial champion – Kate Birch
- Fish processor industry representative – Damian Cappo
- Marketing and sales expert – Peter Fare
- Food and wine ambassador, Department of Primary Industries and Regions – Michael Angelakis
- Stakeholder engagement and communication expert – Justin Phillips
- Seafood South Australia, skills and training expert – Emily Mantilla
- Regulatory and policy expert, Department of Primary Industries and Regions – Belinda McGrath-Steer
- Trade and development expert, Department for Trade and Investment – Becky Houston
- Research, development and extension expert, South Australian Research and Development Institute – Mike Steer
- Advisory forum member – Claire Webber

# Objectives of the forum

The Minister for Primary Industries and Regional Development established the forum in 2020 to deliver on the Government of South Australia's commitment to work with industry to grow the seafood sector of South Australia.

The forum is an advisory group to the Minister with representatives of key sectors of the seafood industry. The forum was tasked by the Minister to develop a 10 year growth strategy for the seafood sector to identify, prioritise and action high-level issues and opportunities to progress South Australia's seafood sector.

The forum was tasked with:

- developing a shared understanding of each part of the seafood sector, including business environments, and market and industry trends
- identifying and leveraging South Australia's competitive advantages and premium brand, and determining how they can play a greater role in growing the seafood industry
- identifying key cross-cutting issues facing the seafood industry that could be barriers to growth both now and for the future
- identifying new opportunities for market diversification, value-adding and export opportunities and developing lesser-known or non-premium products
- developing common approaches and joint action for issues identified in growth strategies, including sources of investment
- working with the education and skills sector to identify training programs to support the skills and development of the seafood sector—to build capacity and provide for succession
- developing an overarching strategic growth plan for the seafood industry that clearly identifies a vision, achievable goals and strategies to achieve growth.

#### Disclaimer

Members of the Seafood Advisory Forum do not warrant or make any representation regarding the use, or results of the use, of the information contained herein as regards to its correctness, accuracy, reliability and currency or otherwise. Members of the Seafood Advisory Forum expressly disclaim all liability or responsibility to any person using this information or advice.

The Government of South Australia acknowledges and respects Aboriginal peoples as the state's first peoples and nations, and recognises them as traditional owners and occupants of the land and waters in South Australia. Further, we acknowledge that the spiritual, social, cultural and economic practices of Aboriginal peoples come from their traditional lands and waters, and that they maintain their cultural and heritage beliefs, languages and laws, which are of ongoing importance. We recognise that Aboriginal peoples have made and continue to make a unique and irreplaceable contribution to the state.

# The South Australian Seafood Sector

South Australia has an excellent reputation for producing premium seafood for provision to local and interstate markets, and export markets.

The South Australian commercial wild catch and aquaculture sectors make a significant contribution to economic outcomes and regional development across the state. In 2019/20, the seafood industry produced over 65,000 tonnes of seafood product with a value of \$469 million and directly supported the employment of approximately 6,000 full time equivalents (FTEs) in regional and remote coastal South Australia. In addition, the recreational fishing sector provided recreational activities for more than 277,000 South Australians and is acknowledged as a vital economic driver for many coastal towns and communities.

South Australia has an excellent reputation for producing premium seafood, which is supplied to local and interstate markets, as well as export markets. The state is well known by local and interstate recreational fishers for its diverse recreational fishing opportunities and range of renowned, highly sought-after premium aquaculture and wildcatch species. These include Southern Bluefin Tuna, Southern Rock Lobster, Abalone, Western King Prawns, Blue Mussels, Pacific Oysters, Barramundi, King George Whiting, Southern Garfish, Snapper, Calamari, Pipi, Vongole and Kingfish. There are also the equally diverse set of lesser-known and under-utilised species such as Australian Salmon, Snook, Ocean Jackets, Yellowfin Whiting and Tommy Ruff (Australian Herring).

The vibrancy and richness of many Indigenous communities are supported by continued access to traditional waters that provide for cultural fishing practices. The State Government recognises Aboriginal traditional fishing as a unique class of fishing and actively works with communities to realise native title rights and ensure that marine and inland waters are used in a sustainable way.

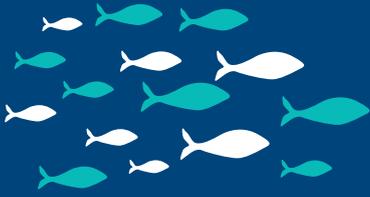
With close access to growing Asian markets and diverse commercial, recreational and Aboriginal traditional fishing opportunities, the State Government and all stakeholders will partner through the Seafood Growth Strategy to realise the growth opportunities and potential for the South Australian seafood sector identified through the strategy.

# Aim of the growth strategy

To drive growth and opportunities for a sustainable, productive and profitable seafood sector.

## Vision

South Australia is a leader in premium sustainable seafood production and experiences.



South Australia is recognised internationally for its

# world-class

fisheries and aquaculture management, which supports our reputation for producing top quality sustainable seafood



South Australia's coastline is more than

# 3,800km

long and our seas are home to a diverse range of commercially fished species.

Along with major seafood exports, South Australia also produces Garfish, King George Whiting, Snapper, Blue Swimmer Crab, Mussels and Calamari

# 65,000 tonnes

produced by the wild catch and aquaculture industries in 2019-20, generating revenue of

# \$440m



# 80%

of Southern Australian marine life occurs nowhere else in the world

# Aboriginal traditional fishing

is recognised as a distinct and unique fishing sector in South Australia. The State Government actively works with communities to help strengthen their connection with marine and inland waters

# 1290

commercial fishing and aquaculture licence holders



More than

# 6700

South Australians are directly employed in the Commercial fishing and aquaculture industries



Port Lincoln is known as the

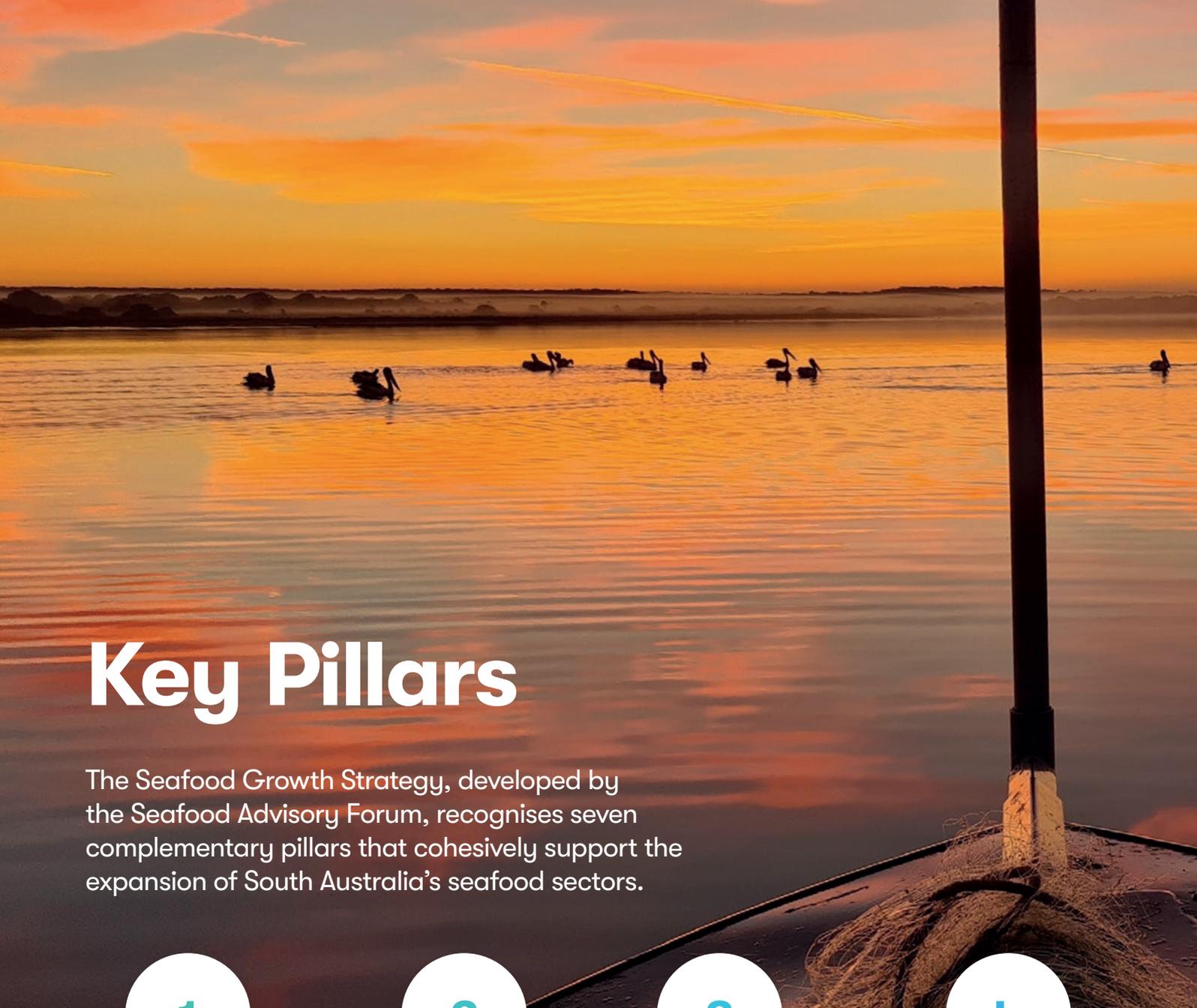
# Seafood Capital

of Australia, with one of the largest fishing fleets in the Southern Hemisphere and a major centre for aquaculture development

South Australia's 277,000 recreational fishers spend nearly

# 1 million days

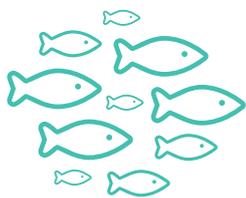
fishing in a year



# Key Pillars

The Seafood Growth Strategy, developed by the Seafood Advisory Forum, recognises seven complementary pillars that cohesively support the expansion of South Australia's seafood sectors.

1



## Support, Unity and Resources

Ensuring all seafood sectors, stakeholders and the State Government work efficiently, effectively and collaboratively to sustainably manage the state's aquatic resources.

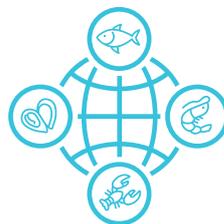
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## Seafood Products and Production

Driving growth and development through new market opportunities, products and experiences.

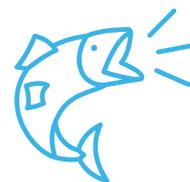
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## Security of Access and Investment

Improving the operating and investment environment through regulatory excellence, quality infrastructure, maintained biosecurity and strategic logistics.

4



## Industry Promotion and Communication

Showcasing South Australian seafood nationally and internationally, resulting in increased consumption and meaningful experiences.

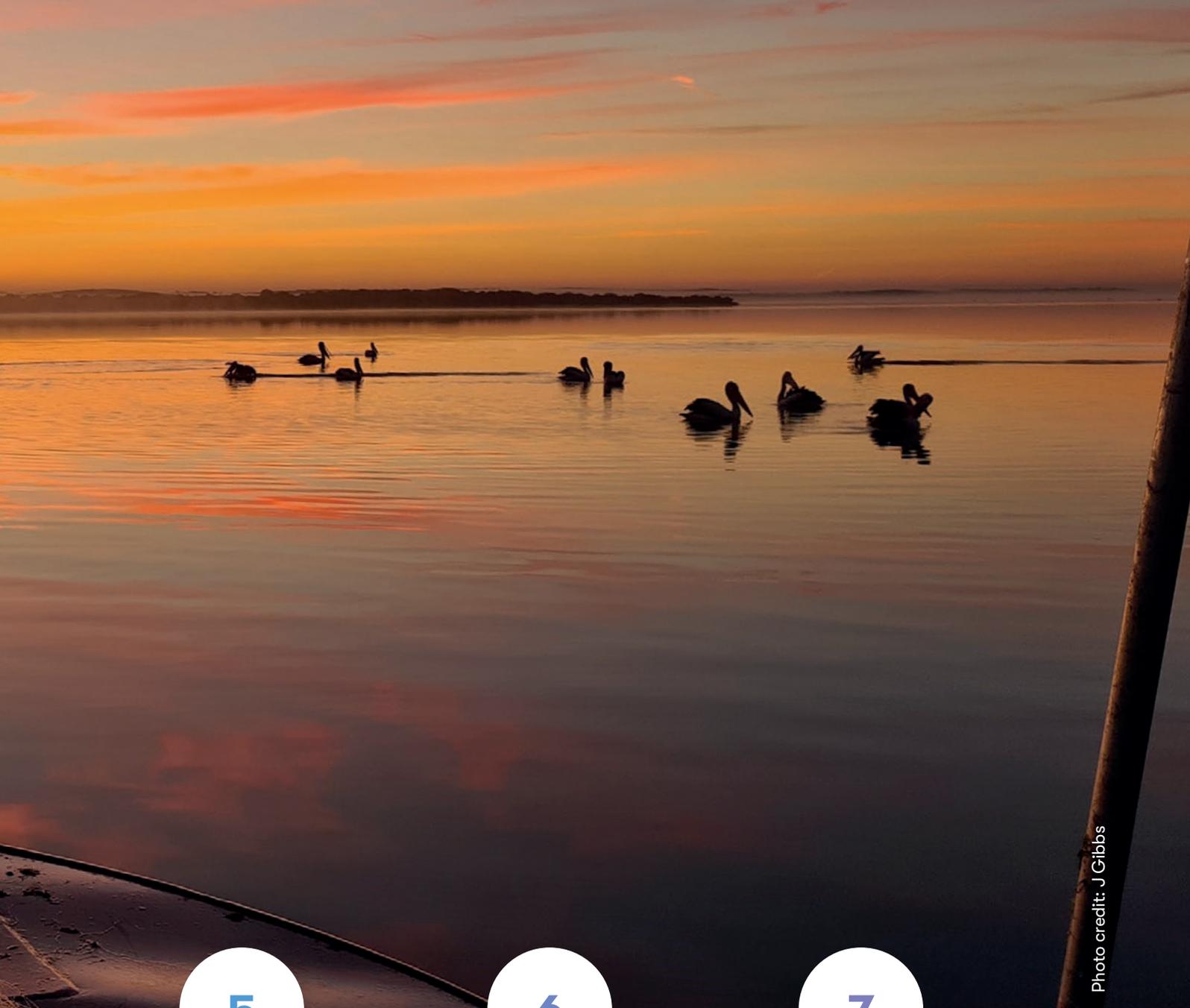


Photo credit: J Gibbs

5



### Capacity Building, Education and Training

Strengthening the skills, competencies, and abilities of people in the seafood industry to ensure the industry is commercially competitive, best practice and agile.

6



### Strategic RD&E

Delivering strategic research, development and extension project investments that support South Australian seafood sector priorities.

7



### Technology Adoption and Innovation

Driving the development and adoption of affordable technology that improves sustainability, traceability and profitability.



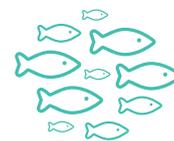
# Support, Unity and Resources

Ensuring all sectors, stakeholders and the State Government work efficiently, effectively and collaboratively to sustainably manage the state's aquatic resources.

A successful seafood industry is underpinned by support, unity and resources. Growth opportunities identified during the development of this strategy recognise the need for the Government to work with industry to provide flexibility in management, timely decision-making and collectively be held accountable for resources.

All industry sectors and the Government need to work together to drive regulatory reform and develop new management and governance structures. This will enhance co-management, drive cost-efficiencies and increase responsiveness to change.

A strong stakeholder voice is needed to advocate on behalf of the whole sector, along with the development of a platform to facilitate better engagement between all stakeholders, and develop a growth market, which is ready for investment.



Goal	Initiatives
<b>Increased co-management</b>	<b>Review co-management approaches to fisheries and aquaculture management</b> <ul style="list-style-type: none"><li>• Work with the State Government to develop new management and governance structures for fisheries and aquaculture that will enhance co-management, drive cost-efficiencies and be responsive to change.</li><li>• Investigate how increasing co-management could improve fisheries and aquaculture stock performance and management outcomes through increasing responsibility and accountability.</li><li>• Set clear targets with timelines for increasing co-management across the sectors.</li></ul>
<b>Build sector relationships</b>	<b>Improve engagement and cooperation between the different sectors so relationships are respectful, open and constructive</b> <ul style="list-style-type: none"><li>• Develop a stakeholder engagement strategy, which defines key audiences, core messaging and engagement approaches. Explore linkages with the Fisheries Research and Development Corporation's (FRDC) engagement strategy, wild catch fisheries, post harvest and aquaculture initiatives.</li><li>• Continue meetings of the Seafood Advisory Forum to ensure cross-sector communication of issues and opportunities.</li></ul>
<b>Seafood advocacy</b>	<b>Establish a seafood advocacy body in SA</b> <p>Scope and establish a cross-sector SA seafood advocacy body which should achieve the following for the sector:</p> <ul style="list-style-type: none"><li>• ensure a credible governance structure</li><li>• review and enforce quality assurance standards</li><li>• drive regulatory reform</li><li>• advocate for well-maintained marinas and entry points</li><li>• advocate for improved access to infrastructure to enable more cost-efficient delivery of resources</li><li>• advocate for security of access</li><li>• collect and respond to high-level industry issues</li><li>• investigate a potential cost recovery fee structure for fisheries and aquaculture</li><li>• consider the development of a competition policy for services.</li></ul>
<b>Creation of an investment environment</b>	<b>Foster industry investment</b> <ul style="list-style-type: none"><li>• Understand the value proposition for global market investment.</li><li>• Conduct a scoping study to find the best vehicle to drive cross-sector investment activities. Review partnership models and a tiered membership structure.</li><li>• Consider how retained profits could be used for community engagement.</li><li>• Review and work to reduce regulatory framework to attract new investment and strengthen investment certainty.</li><li>• Develop an industry funds program that supports new start-up ventures. This will provide more flexibility to investigate opportunities to trial low-risk activities.</li></ul>
<b>Engagement and partnerships with Traditional Owners</b>	<b>Seek Indigenous participation to ensure genuine and authentic engagement on seafood growth and opportunities</b> <p>Establish an Indigenous working group to review growth, employment and tourism opportunities, build links between traditional fishing and commercial/recreational activities and explore new partnerships. This working group will:</p> <ul style="list-style-type: none"><li>• promote greater awareness of Aboriginal traditional fishing</li><li>• develop appropriate methods for collecting Aboriginal traditional catch and effort information</li><li>• analyse the importance of species to Indigenous communities</li><li>• further integrate the management of Aboriginal traditional fishing alongside the management of other sectors to support sustainability</li><li>• promote research to identify and adopt new pathways for industry access for Aboriginal peoples.</li></ul>



## Pillar 2

# Seafood Products and Production

Driving growth and development of the state's seafood sector through new market opportunities, products and experiences.

South Australia has an excellent reputation for producing premium seafood for domestic and export markets. The state is also well known by local and interstate recreational fishers as having diverse recreational fishing opportunities. South Australia is in a position to build on its excellent reputation for premium seafood and diverse recreational fishing opportunities. New opportunities for market diversification, value-adding, and developing under-utilised, lesser-known or non-premium products and seafood experiences need to be explored.

The seafood industry must establish strategic opportunities for growing seafood industry volume and value, and seek to enter the market with new species or products. However, in preparing for growth, it is essential that domestic and international markets are fully scoped to ensure that supply, volume and product align with customer and processor expectations. There is currently a gap in this market knowledge, which is a barrier to growth.

The seafood industry needs to better identify and leverage the competitive advantages of South Australia's premium brand and exceptional regional fishing locations. In turn, the recreational and charter fishing sectors must work creatively to value-add to their seafood experiences. The South Australian community is seeking improved fishing experiences, with healthy fish stocks, and access to quality infrastructure. The sector, as a whole, must ensure that this is achieved.

In preparing for growth, it is essential that all seafood industry partners work under an agreed sustainability framework and that the impact of growth can be both accommodated and supported. Understanding the value of the seafood industry to the regions will also be critical to the long-term positioning of the industry. It must be acknowledged that fisheries management decisions can have significant impact on regional communities and all growth decisions should include an assessment of regional impacts, infrastructure and capability.



Goal	Initiatives
<b>Understand, identify and improve access to new national and international markets</b>	<b>Assess customer demand and review future market opportunities</b> <ul style="list-style-type: none"><li>• Conduct a customer insight survey to gauge the potential of new markets.</li><li>• Scope market demand both nationally and internationally to ensure supply, volume and product aligns with need. Fishers/farmers must better understand the scale of their operation logistics, and their ability to maintain product quality, quantity and brand.</li><li>• Identify future market trends and opportunities, considering trade agreements, market access and, where it is of value, achieve international third-party certification.</li></ul>
<b>Increase volume and value of South Australian seafood</b>	<b>Establish strategic opportunities for growing seafood industry volume and value</b> <ul style="list-style-type: none"><li>• Identify and prioritise new or under-utilised species for existing and new markets.</li><li>• Scope market price points and seek opportunities to reduce cost of production by adoption of innovative technology or new business systems.</li><li>• Establish a voluntary food standard code of practice to set industry standard.</li><li>• Scope more efficient fishing equipment and work with government to see how this can be integrated into business systems and regulations.</li><li>• Review new opportunities for land-based aquaculture and integrated multi-trophic aquaculture to build supply of new and existing species. Note: Land-based is often energy-intensive and South Australia, with its focus on renewable energy, will have a competitive advantage.</li><li>• Progress stock enhancement RD&amp;E.</li></ul>
<b>Sustainable management</b>	<b>Review the ecological sustainability principles of the South Australian seafood industry</b> <ul style="list-style-type: none"><li>• Investigate existing carbon strategies for seafood industries in Australia and across other industries at the state level, and develop a cross-sector seafood carbon footprint strategy.</li><li>• Work with the State Government to review the current Fisheries Management Act and ensure harvest, stock enhancement, new products and market sustainability are considered.</li><li>• Review how fishers can sustainably operate on their licences as climate change impacts populations. Develop forward planning models for better industry success.</li><li>• Support certification of South Australian seafood products, where not already certified.</li></ul>
<b>Increase market growth of new species/under-utilised species and alternative uses for seafood products</b>	<b>Generate new market growth opportunities, which are appropriately scoped and validated</b> <ul style="list-style-type: none"><li>• Identify what lesser-known species may be available in terms of production, market and value.</li><li>• Explore the commercial viability and market potential of new species with processors, retailers and consumers, both nationally and internationally.</li><li>• Develop a feasibility funding program that supports fishers/farmers to scope new ventures, including innovative product development, for risks/reward prior to investment.</li><li>• Develop a marketing campaign for any lesser-known species to increase consumer awareness.</li><li>• Explore the potential for fishers to harvest additional species while working in their licence areas (for examples, dive fishers harvesting seaweeds).</li></ul>

Goal	Initiatives
<b>Unique seafood experiences</b>	<p><b>Value-add to recreational, charter and community fishing experiences</b></p> <ul style="list-style-type: none"> <li>• Explore regions and businesses which could add a tourism element to their fishing experience. This could relate to catching, cooking, experiences, exports or working with charters to broaden the scope of their services. Investigate potential partnerships with other regional businesses or value-chain stakeholders. Align this initiative with the Minister’s Recreational Fishing Advisory Council (MRFAC).</li> </ul> <p><b>Value-add to seafood products</b></p> <ul style="list-style-type: none"> <li>• Develop value-added seafood products that meet consumer demand for sustainable protein.</li> </ul>
<b>Improved fishing experiences—more locations and more species</b>	<p><b>Support recreational/charter fishers by ensuring healthy fish stocks</b></p> <ul style="list-style-type: none"> <li>• Review and prioritise areas for reef habitat restoration and ecosystem management, which increase reef volume, create new environments and create productive areas for tourism.</li> <li>• Instigate and prioritise stock enhancement projects and ensure this is appropriately regulated. There is a growth area between wild harvest and aquaculture which needs regulation and policy to underpin its development.</li> </ul>
<b>South Australian regions prosper through seafood business growth</b>	<p><b>Review the importance of the seafood sector to regional communities and better define the value of seafood to the South Australian regions</b></p> <ul style="list-style-type: none"> <li>• Collect regional data to support market growth, infrastructure and capability potential in regional South Australia.</li> </ul>
<b>Food innovation</b>	<p><b>Support industry to adopt food innovation</b></p> <ul style="list-style-type: none"> <li>• Review new packaging and cooking opportunities, including frozen, ready-to-go meals and longer shelf-life products by scoping ideas with consumers, retailers and processors.</li> <li>• Create a seafood innovation hub, which supports businesses to trial new ideas with experts prior to investment.</li> <li>• Establish a small grants scheme, which supports the integration of food innovation concepts into the business. Concept to look at how businesses can better adopt new technologies, such as filleting machines, high pressure processing, packaging to improve efficiency and quality.</li> <li>• Explore new opportunities to use waste and generate return and alternative uses, such as bioplastics and stable colour.</li> </ul>



## Sector Targets

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### Grow Aquaculture

#### Drive growth and development

- Identify new market opportunities.
  - Identify new species and supporting RD&E priorities.
  - Identify new formats—packaging and presentation
  - Reduce regulatory framework to attract new investment.
  - Understand the value proposition for global markets and investment.
  - De-risk by increasing the knowledge and development of target species.
- 

### Vibrant wild catch sector

- Prepare and innovate for future markets including tourism.
  - Engage the community/consumer with local legacy/provenance.
  - Reduce catch costs where possible. For example, reducing input controls for a quota fishery (amalgamation of effort).
- 

### Engaged and dynamic recreational sector

#### Diverse experiences

- Service and engage whole recreational fishing community.
  - Recreational licensing/registrations – where to from here?
  - Collaborate with other sectors to realise tourism opportunities.
- 

### Aboriginal participation in the sector

#### Realise aspirations

- Identify new market opportunities.
  - Identify areas of management reform that will open new entry pathways into the sector.
  - Collaborate and partner with existing business and ventures to grow market opportunities.
-



# Security of Access and Investment

Traditional fishers Robert McCallum and his daughter Chloe, Coorong

Improving the operating and investment environment through regulatory excellence, quality infrastructure, maintained biosecurity and strategic logistics.

In South Australia, the Department of Primary Industries and Regions (PIRSA) has a responsibility to protect, manage, use and develop the aquatic resources of the state in a manner that supports ecologically sustainable development. This includes managing the activities of Aboriginal traditional fishers, an estimated 277,000 recreational fishers, over 1,000 commercial fishery and aquaculture licence holders, as well as a small number of exploratory and developmental fishery permit holders.

Currently, the regulatory environment for fishers is provided through the *Fisheries Management Act 2007*. The Act provides a legislative mechanism for all state waters to protect, manage, use and develop the aquatic resources within them in an ecologically sustainable way. The Seafood Advisory Forum members agreed that refinement and review of the Act is required to ensure a more flexible management environment, increased industry efficiency and reduced costs for businesses. It was also agreed that the industry needs to work collaboratively to identify and plan for biosecurity risks and manage shared resources, logistics and infrastructure.

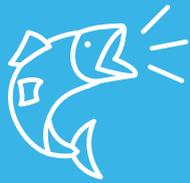
Access to well-maintained infrastructure is fundamental to the seafood industry. Infrastructure maintenance and management has been raised as a concern in some regions, with the quality of some roads, ports, electricity and freight impacting the ability to get products to market in a timely fashion—from on-boat harvesting, storing and freezing to road transport. More strategic management that is representative of the whole industry is required.

The forum also discussed the need to improve how sectors collectively manage the allocation of species, spatial access where they can operate and, more broadly, the eroding of access to marine resources because of coastal development. The cumulative impact of this loss of access to fishing resources has not been assessed, which is an industry gap that needs to be better understood and managed.

The following goals and initiatives must be addressed to improve security of access and foster investment.



Goal	Initiatives
<b>A well-managed marine environment</b>  <b>An efficient regulatory framework that is flexible and transparent</b>	<b>Review the current Fisheries Management Act 2007 (the Act) to ensure a more flexible management environment, to reduce red tape, and increase industry and PIRSA efficiency and reduce costs. Work towards a transparent cost recovery, regulatory management and review system</b>  The current regulatory framework is cumbersome and needs to be flexible and easy to administer. This will require the following actions: <ul style="list-style-type: none"><li>• establish an independent working group to review the current Act and scope areas for improvement</li><li>• look for reform priorities to enable flexible and responsive management</li><li>• involve regular, independent expert oversight and review.</li></ul> The following areas must be carefully reviewed: <ul style="list-style-type: none"><li>• the assessment of leases and licensing for aquaculture needs to provide for short-term trials to help assess the viability of new farming activities within a short-time frame</li><li>• fisheries management must provide for the adaptive management of stocks over appropriate timeframes and better balance the need for flexibility and the security and stability of access</li><li>• investigate options for Indigenous communities to realise their aspirations and build greater capacity to engage in all seafood sectors</li><li>• work with PIRSA to develop a program of independent review of relevant work programs to ensure continual improvement and best practice</li><li>• develop and promote industry-led codes of practice to manage low-risks to the sustainable use of aquatic resources to publicly demonstrate stewardship.</li></ul>
<b>Industry is proactive, prepared and protected to manage biosecurity risks</b>	<b>Develop strategies to minimise biosecurity issues through ballast water, biofouling, and interstate or imported seafood products</b> <ul style="list-style-type: none"><li>• Identify and scope priority risks, and develop a proactive response plan prior to a biosecurity event.</li><li>• Establish clear regulation and industry stewardship across multiple users including maritime industries.</li><li>• Develop partnerships with international governments to identify, plan and reduce risk to maintain market access. For example, maintain SafeFish.</li><li>• Link with State/Commonwealth Government agencies and industry stakeholders to ensure ownership and responsibility.</li><li>• Ensure the public is aware of the threats/impacts and establish community citizenship programs, which help identify and report biosecurity issues.</li></ul>
<b>Better logistics underpinning industry</b>	<b>Logistics/transport to support better movement of product for industry and tourism access</b> <ul style="list-style-type: none"><li>• Review standards and current systems to ensure unloading facilities are food safe.</li><li>• Explore potential collaboration points and co-investment opportunities with industry.</li><li>• Work with peak transport bodies to ensure transport is affordable.</li><li>• Explore new opportunities for cold-chain technology and fleet tracking with other aligned industries.</li></ul>
<b>Manage industry entry</b>	<b>Review the regulatory framework for fish processor registrations</b> <ul style="list-style-type: none"><li>• Review this framework to ensure human health standards are maintained and innovation is fostered.</li></ul>



## Pillar 4

# Industry Promotion and Communication

Photo credit: Limestone Coast Fishermen's Co-operative

Develop communication campaigns that promote South Australian seafood locally, nationally and globally. This will be done through export markets, increasing consumption and willingness to pay, raising awareness of health benefits and supporting/encouraging meaningful experiences.

The Seafood Advisory Forum agreed that the industry must unite and promote the industry as a socially responsible community that provides the best quality seafood and, underpinned by sound RD&E, innovation and sustainability. The forum agreed that proud, strategic and honest marketing is essential to drive growth in the sector. In achieving increased consumption of South Australian seafood, it is noted that growth in production, resource security and fostering career development in the seafood sector go hand in hand. The following opportunities must be capitalised on by the seafood industry to achieve the ultimate aim of increasing consumption of South Australian seafood, as this in turn creates jobs, regional growth and business expansion.



Goal	Initiatives
<b>Innovative produce experiences and high-end tourism offerings promoting South Australian seafood</b>	<b>Leveraging the tourism potential of the seafood industry and developing promotional campaigns around seafood industry experiences. This will link to value-adding in the recreational/charter sector</b> <ul style="list-style-type: none"><li>• Promote product experiences and/or high-end tourism offerings, which will engage consumers. This could include diversifying charter boat offerings or exploring tourism opportunities via aquaculture/fishing produce experiences. Ensure experiences are cross-pollinated with other industries in South Australia to add further value and build regional inclusion.</li><li>• Combine with local councils and industry groups to develop long-term programs such as ‘Seafood Trails’.</li><li>• Work with tourism businesses to educate on seafood quality, products, sources, challenges and success stories across the seafood sectors.</li></ul>
<b>Increased consumption of South Australian seafood</b>	<b>Develop and deliver innovative marketing campaigns to promote South Australian seafood</b> <ul style="list-style-type: none"><li>• Establish a taskforce to develop an innovative seafood marketing/communication strategy – such as ‘Eat Fish Fridays!’— that promotes the industry and clarifies any misconceptions.</li><li>• Hold focus groups with consumers and chefs/food service staff on price, position and placement of seafood to better understand what drives purchasing behaviour.</li><li>• Explore the potential of a South Australian seafood brand ambassador to promote and connect with consumers.</li><li>• Instigate seafood product features in boutique supermarkets which consider new systems/ approaches to displaying South Australian seafood. Review new and existing strategic partnerships and work to better promote seafood presentation in boutique supermarkets.</li><li>• Partner with and support major supermarket chains to better display and handle products.</li><li>• Partner with national and international chefs on events and in restaurants to showcase South Australia’s premium seafood.</li><li>• Develop a communication and awareness campaign of any new/lesser-known, under-utilised species.</li><li>• Develop a calendar of regional events and work with regional towns to use local events to create destinations known for their seafood.</li></ul>
<b>Seafood industry is trusted and engages well with the public, including recreational fishers, and social licence is maintained</b>	<b>Seafood consumers and the wider industry trust, value and respect the industry</b> <ul style="list-style-type: none"><li>• Foster community support through messaging based on sustainable production and good management, health benefits, disease free product and environment, and socio-economic benefits for regional coastal communities and the state generally.</li><li>• Ensure the industry understands social licence/community trust.</li><li>• Develop an industry animal welfare strategy which fosters/promotes best practice in the handling and ethical treatment of animals and fish across the industry.</li><li>• Develop a code of conduct/practice, with associated compliance, for each sector, including recreational fishers.</li><li>• Once developed and released, consider and align with national campaigns to develop/ leverage a cohesive brand for quality seafood</li></ul>
<b>Community has access to information on fishing and aquaculture</b>	<b>Community has easy access to accurate information on fishing and aquaculture</b> <ul style="list-style-type: none"><li>• Develop a community resource to make the industry more visible to the public. Significant data has already been collected, and this needs to be better compiled and distributed to the community.</li></ul>



## Pillar 5

# Capacity Building: Education and Training

Strengthening skills, competencies and abilities to ensure that the seafood industry is commercially competitive, employs best practice and is agile in a changing climate.

The success of the Australian seafood industry is underpinned by a skilled workforce. It is recognised that there are a range of existing seafood training programs. These include the Seafood Industry Training Package, which offers a high-quality suite of nationally endorsed competency standards, assessment guidelines and qualifications that support fishing, aquaculture, seafood processing, seafood sales, seafood distribution and compliance. However, there is room to expand the training programs on offer and drive better skills development in the South Australian seafood industry. Skill development must be supported at all levels—from new industry entrants through to managers.



Goal	Initiatives
<b>A skilled workforce</b>	<b>Workforce training needs to be prioritised and addressed so the industry is forward-thinking and prepared</b> <ul style="list-style-type: none"><li>• Analyse industry training needs to understand the skills gaps and what the industry should support and invest in. Training and education in the tertiary and VET sectors, and other short courses, should be considered.</li><li>• Implement new training opportunities in priority areas such as biosecurity, agtech, maintaining product quality and best practice handling, including food storage along the supply chain. Also in marketing, negotiation/lobbying, resource management and branding, adoption of new technology and data use.</li><li>• Develop an industry committee to work with the Australian Skills Quality Authority, and other organisations that manage training packages, to regularly review and update units of competency. This will ensure the next generation and existing workers are being trained in the most up-to-date information and technology that meets industry needs.</li></ul>
<b>Investments which drive growth</b>	<b>Making businesses investment-ready</b> <ul style="list-style-type: none"><li>• Increase business investment readiness through business planning and development strategies.</li></ul>
<b>Seafood businesses are employers of choice, with the right culture, salaries and workplace wellbeing</b>	<b>Attracting and retaining staff</b> <ul style="list-style-type: none"><li>• Develop business training for attracting and retaining staff.</li><li>• Educate young people about career opportunities and training pathways within the seafood industry.</li></ul>
<b>Training is offered and used in regional areas</b>	<b>Improve access to regional training facilities including TAFE, short courses and private providers</b>
<b>New traineeships that support industry succession</b>	<b>Develop new traineeships, which meet industry needs and gaps</b> <ul style="list-style-type: none"><li>• Review traineeship opportunities, and instigate programs, which support young and Indigenous people moving into the sector.</li></ul>
<b>Develop training to support in-store promotion of seafood products</b>	<b>In-store marketing training</b> <ul style="list-style-type: none"><li>• Develop a suite of guidelines, including guidelines for in-store training, on how to better promote fresh and frozen seafood products via in-store demonstration campaigns. The strategy must consider the role of processors to minimise market fragmentation.</li></ul>



## Pillar 6

# Strategic Research, Development and Extension

Photo credit: Australian fishing enterprises

Access to strategic Research, Development and Extension investments, which support South Australian industry priorities.

Publicly funded research is necessary to underpin the growth of the sector, especially in animal health, stocks, sustainability, biosecurity, new/emerging species and productivity. While there is a strong national Research, Development and Extension (RD&E) seafood sector, there is room to grow the South Australian RD&E space to ensure the focus is specific to local conditions and needs.

A priority goal in Pillar 6 is to conduct a formal scoping study to identify key research gaps/opportunities needed to drive productivity gains. Initial scoping has provided a starting point, however, wider consultation is needed.

Moving forward, the need to adopt RD&E, and in fact innovation, will only increase. Fishers and farmers must remain commercially viable, compliant and environmentally sustainable. So, a goal for the seafood industry must be to drive the adoption of research knowledge. Better use of RD&E, starting with stock assessment, will be the first step to progressing this objective.



Goal	Initiatives
<b>Research priorities identified and supported through RD&amp;E investments</b>	<b>Review research priorities and link to the needs of each pillar</b> This research must be supporting and not driving.
<b>The seafood industry has a South Australian based industry levy, which supports seafood growth R,D&amp;E initiatives</b>	<b>Investigate the potential of establishing R&amp;D levy mechanisms that support RD&amp;E funding initiatives in South Australia</b> <ul style="list-style-type: none"><li>• Review a range of primary industry levy fund programs and instigate a program to support the South Australian seafood sector. Review the national models and models proposed through the Australian Seafood Cooperative Research Centre (CRC), Australian Wild Abalone and Love Australian Prawns. Ensure they complement national levy collection schemes and are cross-sector where possible.</li></ul>
<b>Improved stock knowledge</b>	<b>Ensure stock assessment reports consider all sector catch data</b> <ul style="list-style-type: none"><li>• Measure the volume of the recreational fishing sector and ensure all catch is built into a harvest model.</li><li>• Develop mechanisms to integrate and use traditional fishing catch and effort information for use by communities and in stock assessments.</li></ul>



## Pillar 7

# Technology Adoption and Innovation

Photo credit: Limestone Coast Fishermen's Co-operative

Driving the development and adoption of affordable technology and innovations which improve seafood sustainability, productivity, traceability and profitability.

Technology adoption and innovation represents a significant growth area for the South Australian seafood industry. Many fishers/farmers use innovations to achieve productivity and efficiency gains. However, the future of technology is yet to be fully realised in the seafood industry.

The adoption of technology is encouraged to address seafood industry challenges, including better stock management, traceability and environmental sustainability.

The following areas are considered key initiatives for technology adoption and innovation to progress the South Australian seafood industry.



Goal	Initiatives
<b>Technology and innovation used for efficiency and productivity gains</b>	<b>Review and implement new technologies to drive efficiencies in seafood businesses</b> <ul style="list-style-type: none"><li>• Scope national/international food technology initiatives, such as the use of robotics or innovations to gain efficiencies in product development, delivery and efficiency.</li><li>• Scope the potential for developing new products. These could relate to shelf life, treatments or a home meal, or respond to market demand.</li></ul>
<b>Climate mitigation and preparedness strategies underpinning the sector</b>	<b>Forecast the impact of climate on aquatic populations</b> <ul style="list-style-type: none"><li>• Develop the sector's technology capacity to better understand the impact of climate drivers on marine species, and the impact on their recruitment and growth rates combined with real time monitoring, using technology.</li></ul>
<b>New technology to review and manage traceability</b>	<b>Develop a state-based traceability program to ensure ease and compliance, and meet market expectations</b> <ul style="list-style-type: none"><li>• Develop a framework for better traceability of product and product of origin promotion. Consider a new e-traceability system, which supports compliance amongst the seafood industry. Note the need to better enforce current laws.</li><li>• Ensure that the platform and approach considers links to biosecurity.</li><li>• Ensure that new technology to manage and administer seafood production can incorporate traceability.</li></ul>
<b>Support better digital literacy amongst fishers</b>	<b>Build confidence, skills and knowledge of fishers to use and adopt e-solutions</b> <ul style="list-style-type: none"><li>• Develop and deliver a state-wide industry training program to support the adoption of digital programs.</li></ul>
<b>Industry is connected via functional and effective 'e-catch' and 'e-business' solutions</b>	<b>Scope a new phone app or program that can provide dashboard information to the industry. A single data collection platform would support better records and transparency, providing real-time stock assessment and industry management capability. The program would also enable better traceability and provenance (source of origin) capture</b> <ul style="list-style-type: none"><li>• Scope and develop electronic reporting and business solutions that improve business productivity and performance.</li><li>• Scope and develop a new system for all sectors to report required catch information, together with a means of performing all licensing and administrative services through a customer relationship management service (CRMS).</li><li>• Scope and develop a smart phone/device friendly app, which enables community members to capture recreational fishing data. A public-facing dashboard would provide clear metrics to the industry, noting privacy and confidentiality constraints.</li><li>• Investigate how any new system works in with existing systems that sectors have invested in.</li></ul>

# Commitment Statement

In developing the 10-Year Seafood Growth Strategy (the strategy), the Minister's Seafood Advisory Forum, with representatives from each of the seafood sectors, drew on a wealth of knowledge, resources and input from seafood stakeholders across the industry and across South Australia.

Through meetings and workshops, the Seafood Advisory Forum identified key pillars to form the strategy. These pillars address the strategic goals and initiatives required to drive the productivity gains required to support the Marshall Liberal Government's Growth State 2030 Plan. This plan aims to grow the gross state product by 3 per cent every year to achieve a primary industries revenue of \$23 billion by 2030, and recognise the importance of seafood to the Growth State Plan.

The Seafood Advisory Forum recognises the challenges faced by the seafood industry. Now, more than ever, it is important to capitalise on the opportunities facing the industry over the next decade.

The next steps are the most important: how to bring the strategy and its initiatives to life.

The forum recognises that a united and cohesive industry approach is required to move forward and succeed in achieving not only the strategy's goals, but the future of the seafood industry more broadly.

An important next step for the forum is the development of a short-term operational plan to establish the priorities and activities required to implement the strategy over the next two to three years. This will ensure continued collaboration and engagement across all stakeholder groups. Operational plans over shorter timeframes will allow the sector to deliver on the strategy and address objectives within the current operating environment and the available opportunities.

In developing the operational plan, consideration should be given to what is already happening both in South Australia and nationally that can be leveraged, or enhanced, to achieve the goals envisaged by the strategy.

Actions going forward should be focussed on avoiding duplication and fragmentation, and must aim to maximise return on investments of both time and money. This will be possible through accessing existing available funding schemes for regional, business or resource growth. This will drive the initiatives of the strategy towards real outcomes. The setting of key performance indicators and monitoring activities will be important for tracking success and informing future focus.

The seafood sector is resilient and strong, but is operating in an environment that has been significantly altered as a result of COVID-19 restrictions and market changes. To realise the potential of the sector to innovate and develop, constructive collaborations, such as partnerships or joint ventures could be explored, and champions and ambassadors are needed to align and drive targeted outcomes.





**Government  
of South Australia**