



AUSTRALIAN  
**Prawn  
Farmers**  
ASSOCIATION

**The Australian Prawn Farmers Association**

**Issues Identification Discussion paper**

August 2011

## **Executive Summary**

The Australian Prawn Farmers Association (APFA) is an incorporated not-for profit Industry Association formed to support the sustainability of the industry. The objectives for which the Association is established are:

1. To promote and support all aspects of the Australian prawn farming industry
2. To provide a unified voice for the prawn farming industry in representations to government and other bodies
3. To promote and undertake, as necessary, research and development in the Australian prawn farming industry
4. To promote the development of prawn farming as an environmentally sustainable industry
5. To foster and promote goodwill amongst members of the Association in furtherance of its objects

The APFA is currently engaged in many activities that support the development of the Australian prawn farming industry and there are significant research and development activities currently being monitored. The Association also currently supports several marketing activities and is engaged in supporting the industry through lobbying at political events. Members of the Executive regularly engage in mentoring activities and support and provide advice to farmers where possible.

The APFA has engaged Dr John Whiteoak from the University of the Sunshine Coast support the strategic direction of the Association as well as provided clearer accountability to its members. In doing so, the purpose and values of the Australian Prawn Farm Association has been clarified. In addition, some specific issues related to achieving the objectives of the Association are presented. Twenty-nine recommendations are listed to provide suggestions for strategic focus. Finally, 10 competency measures have been created to provide clearer accountabilities and preliminary indicators of success for the APFA Executive. More specific accountabilities and strategies will be developed after discussions with members at the 2011 Annual General Meeting (AGM). Feedback received from members will drive the focus of the Executive over the next 12 months.

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## 1. Introduction

This report was authorised by the Australian Prawn Farm Association (APFA) and has been developed to support the strategic direction of the APFA Executive group. Members meet at least once every two months and at two meetings this year have begun to identify key issues facing the industry and develop strategies that the Executive can execute to support the development of a strong prawn-farming industry.

This report summarises and presents the key outcomes from these strategy discussions. The process was facilitated by Dr John Whiteoak from the University of the Sunshine Coast and all members of the Executive were consulted and given the opportunity for input during the information gathering process. The information presented here is limited to the views of members of the Executive and no primary research has been conducted by the author in developing this report.

Specific recommendations are presented at the end of the document. These are followed by measures of success that can be further refined over the next 12 months. More specific accountabilities and strategies will be developed after discussions with members at the 2011 AGM. Feedback received from members will drive the focus of the Executive during the next 12 months.

This report outlines the purpose and values of the committee. Further, some key issues facing the Executive committee in achieving its objectives have been identified. Preliminary strategic suggestions have also been developed, along with initial success measures for the Executive. Additional development and specification of strategies, actions, key performance indicators (KPI) and accountabilities will continue but are beyond the scope for this strategic report. This report does however provide the impetus for these next steps.

It should be noted this report is an issues document and is forward looking and as a consequence does not provide detailed historical data or outline in detail the past activities of the Association. This report is designed to support the development of strategic direction for the Association so that it can best serve the industry in the future. More detailed historical information can be located in other reports produced by the Association.

The report proceeds as follows. First, the purpose and values of the Executive are presented. Then we outline the Association's key objectives and describe strategies that can be implemented to achieve them. Finally a series of recommendations are presented for consideration. Additional information relevant to the report, Association and industry has been included for reference as Appendices.

## **2. Purpose of the Prawn Farm Industry Association**

To facilitate the performance of the APFA a purpose statement and a series of guiding values have been developed. For the Association to be successful it is critical that a clear purpose is articulated and expectations for members are unambiguous. An agreed charter and values can support strategic decision making and should support the effective operation of the Association. The prawn farming industry is facing many significant issues and a strong industry body is needed to set strategy, manage KPI's rigorously, and manage the accountability and legal requirements of the industry. Central to this is a committed and accountable Executive committee. The current Executive group is committed to supporting the strategic direction of the prawn-framing industry and an overall purpose of supporting, developing and protecting the industry. In doing so we also want to encourage and facilitate feedback from all our members to support our purpose.

***Purpose Statement: To support the development of a strong Australian Prawn Farming Industry.***

The key purpose of the APFA Executive is to protect and encourage the development of a positive culture in the Australian Prawn Farming industry that is competitive, unified and sustainable. We will attempt to achieve this by providing a strong voice of influence in key stakeholder and policy maker decisions. Further, the Executive is driven to encourage appropriate industry growth, research and development, and returns on investment for all of its members. Finally, we are committed to continually improving the use of all industry resources for the benefit of all of its stakeholders.

Below are the values we believe that will support the achievement of our purpose. These values are designed to guide the behaviour of the committee and to provide clear expectations for future members. The values will be regularly reviewed to ensure they are being adhered to.

### 3. Our Values

To achieve its purposes the committee wants to be seen as a trusted advisor and advocate for all its members. It is agreed that all members of the committee will do their best to maintain the highest level of personal integrity and go about their business in an ethical and transparent manner at all times. It is our goal to ensure that members can feel confident that the APFA Executive members operate without personal agendas and in the best interest of the industry as a whole. A committee member is only accepted when they consider it a privilege to represent their industry and agree to be committed to the values of the Executive.

*Therefore, all committee members agree to:*

- An industry first-always philosophy. While we recognise farms may have individual issues, it is expected that all members of the Executive make decisions with an industry first philosophy at all times. As a consequence it is acknowledged that a committee member may have to support a decision that may have negative impacts on their own personal interests.
- No conflicts of interest or personal agendas. If a decision creates a significant conflict of interest or there is a clear personal agenda, the committee member is expected to notify the other members and abstain from voting or discussion. If necessary other members may agree that there is a conflict and request a member abstain.
- Be an active mentor. All members of the committee are prepared to actively share their knowledge and experience among other members of the Executive, sub-committees and wider member community to advance the capacity and leadership within the industry collectively.
- Deliver results and be accountable. The committee strongly believes that it is our job to provide tangible and measurable results for our members. As such, our focus is to make a difference by delivering on our commitments.
- Communicate in a consistent and united voice. We encourage frank and fearless discussions among the committee but once a decision is made one voice will come from our meetings. Each of us will speak for the whole committee. Confidentiality in discussions is always respected.

- Actively participate in meetings. Members agree that to be present in our meetings and to be well prepared is a priority for all of us. Teamwork and collaboration are important to us.
- Welcome and explore new ideas. The committee believes creativity and innovation is central to the sustainability of the industry and encourages new ideas and the questioning old assumptions. No process or person is automatically exempt from examination.
- Enjoy our work on the committee. Members are enthusiastic, positive and passionate about the industry. We take our role seriously but encourage teamwork, fun and enjoyment in the process.

In the next section key issues, risks and potential opportunities are discussed that may influence the achievement of our key objectives during the next 12 months.



#### 4. Key Objectives of the Association and Supporting Activities

The key objectives for the Association have been developed and have been previously approved and are presented in the Association rules. In this section of the report we review some of the issues, challenges and activities associated with achieving these objectives.

The following five key objectives have been previously identified for the APFA Executive:

1. Promote and support all aspects of the Australian prawn farming industry
2. Provide a unified voice for the prawn farming industry in representations to government and other bodies
3. Promote, undertake and monitor, as necessary, research and development in the Australian prawn farming industry
4. Promote the development of prawn farming as an environmentally sustainable industry
5. To foster and promote goodwill amongst members of the Association in furtherance of its objects





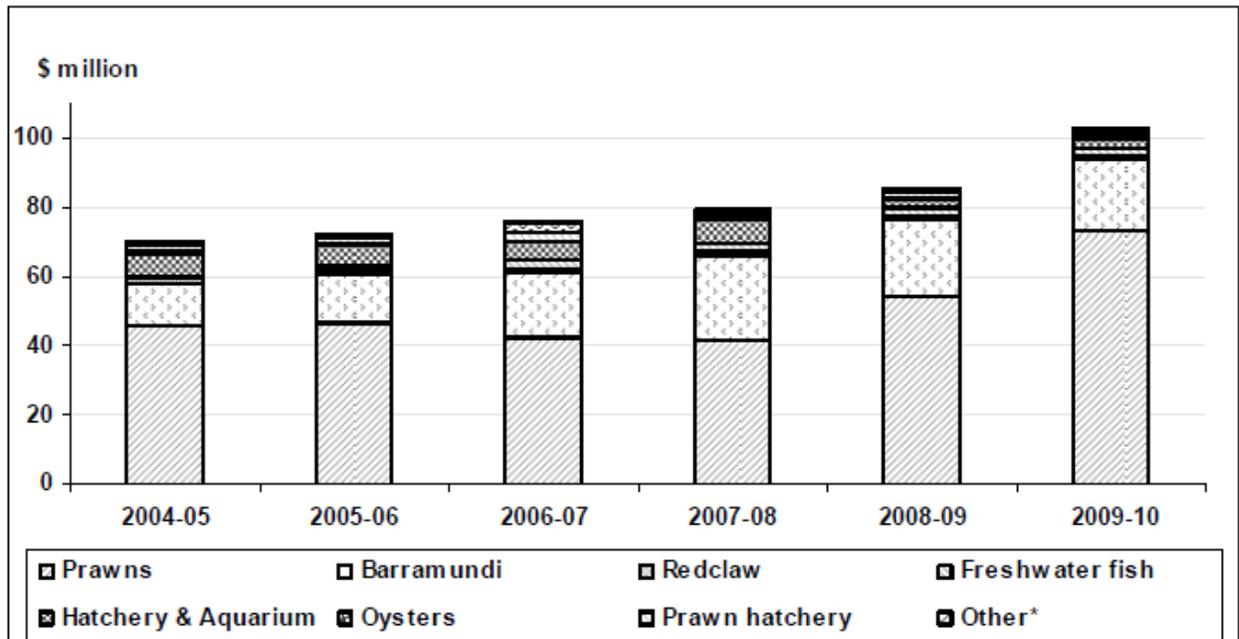
#### **4.1 Objective #1: Promote and support all aspects of the Australian prawn farming industry**

In reviewing this objective, it is appropriate to first provide an industry and competitive analysis that outlines some of the issues confronting the industry. The data presented below was sourced from previous relevant research.

##### **Industry Analysis**

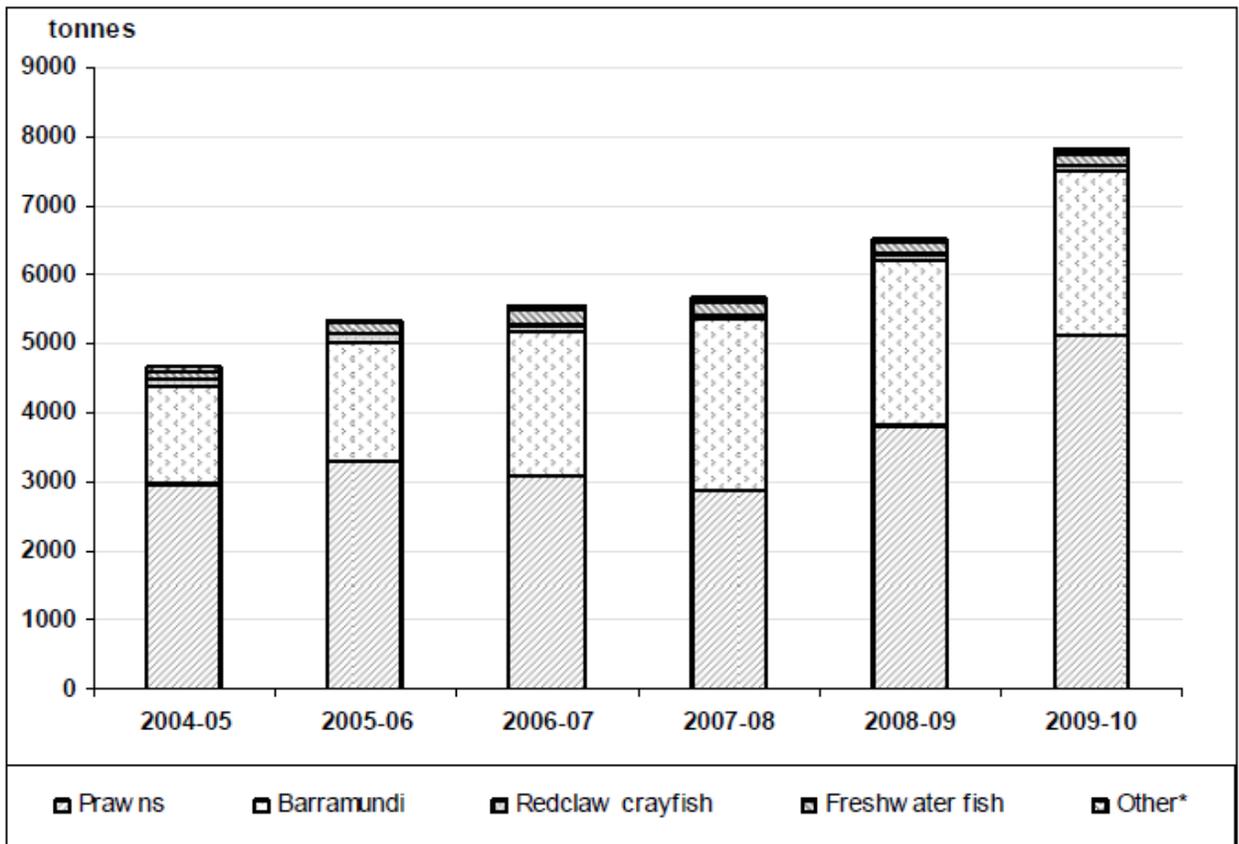
In 2009–2010, 20 per cent of Australian prawn production was farmed with the majority of prawn aquaculture occurring in Queensland, which produced 5,200 tonnes in 2009–10 with a value of \$74 million. The following two figures come from the Queensland Government’s Department of Employment, Economic Development and Innovation’s Aquaculture production survey (July 2011).

**Figure 1: Trend in value (\$ million) of Queensland aquaculture production**



\* 'Other' includes crabs, sea scallops, marine fish and eels.

**Figure 2: Trend in Queensland aquaculture total production (tonnes)**



\* 'Other' includes crabs, sea scallops, marine fish and eels.

The total prawn production in Australia is estimated to have decreased by 8 per cent in 2010–11, to 24,500 tonnes (ABARES 2011). Lower production in 2010–11 is claimed to be largely a result of lower production of wild caught and aquaculture prawn production from Queensland, following floods and Tropical Cyclone Yasi in early 2011. The real value of production is also estimated to decline in 2010–11, by 6 per cent to \$309 million. Despite this, it is the general view of the APFA Executive that the medium-term outlook for the APF industry is positive. It is expected that aquaculture production of prawns in Australia will continue to increase at a consistent rate through to 2015–16 ([www.thefishsite.com/articles/1077/australian-fisheries-outlook](http://www.thefishsite.com/articles/1077/australian-fisheries-outlook)).

In the short-term the relatively high Australian dollar may provide opportunity for importers, however the strong desire for Australian prawns by consumers is likely to continue to support our market position.

While there are many opportunities for the industry there are important issues confronting us that require our united attention. Perhaps the most significant challenge facing Australian prawn farmers is in achieving long term sustainability for the industry. Below we describe our view of the competitive environment.



## Competitor Analysis

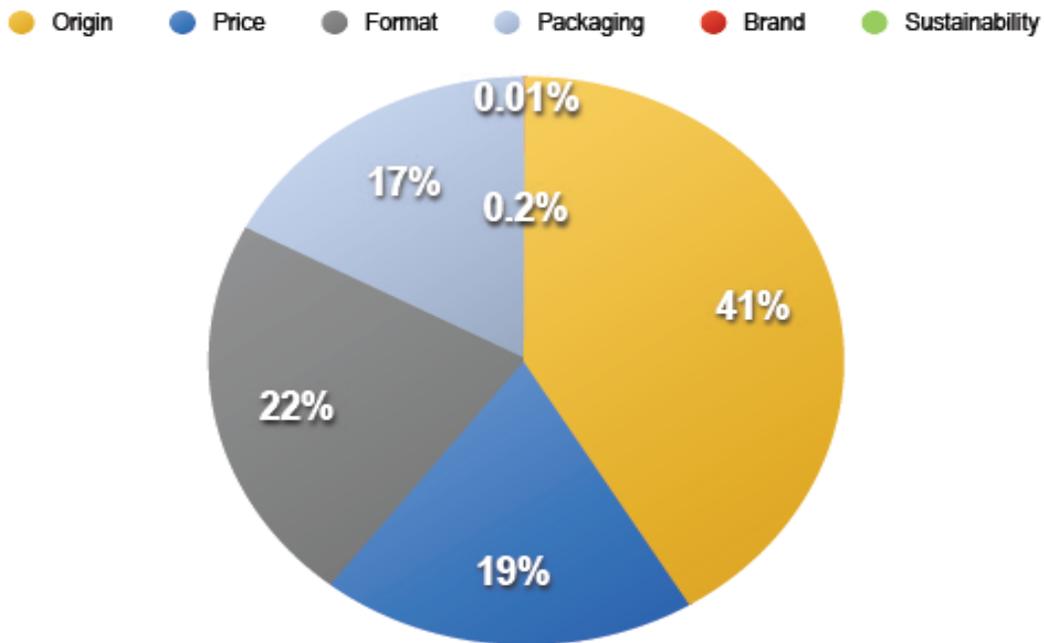
Analysis of our competitive environment suggests several relevant concerns. We consider our key competition coming from cheap imported prawns. It is likely the competition will continue to increase and if there is an excess of prawns produced it may drive prices of Australian prawns down significantly. In addition, if the import quality remains stable then there are concerns of restaurants and cafes using these cheaper imports as there is no requirement to identify the origin of prawns in their dishes. Product substitution is an ongoing concern as wholesalers, retailers and restaurants may use imported product but are not required to identify point of origin. This can lead to exaggerated returns on sales and encourage greater volumes of imported prawns entering the domestic market.

Australian wild-caught prawns are also considered a major competitor to the Australian farmed-prawns. It appears consumers will generally chose wild-caught seafood product rather than a farmed substitute. Research from the University of South Australia suggests that 64 per cent of consumers prefer wild caught fish. While it is not stated how this relates specifically to the prawn market, it seems reasonable to assume that a large percentage of consumers would choose wild over farmed produce. The Association members need to consider our relationship with the wild-caught industry. There may be benefits to focus on the overseas competition collectively. This is an issue that requires clarification and will be a focus for future discussion among the Executive and its members.



Given the current situation, the Association suggests that we attempt to increase the per capita and general consumption of Australian farmed prawns by supporting an increase in the media presence of our produce through effective marketing strategies. We believe one of our key competitive advantages is being an Australian and a high-quality and reliable product. As shown in Figure 3, it is very clear that Australian consumers will be happy to pay more prawns that are farmed in Australian.

- **Figure 3:** Drivers of consumer decision-making when purchasing prawns (Seafood Omnibus Survey, ASCRC & Uni SA, 2009)



*Origin is the most important drivers of choice in the Prawns market, followed by format, price and packaging options*

Given this, our ability to increase the point of origin awareness of consumer's should support sales. As stated above, Australians want Australian prawns and are prepared to pay a premium for them. However, current market conditions can lead to consumers inadvertently purchasing cheaper imports believing them to be Australian. In addition, consumers are still price sensitive and to remain competitive we will have to ensure a high quality product at competitive prices. The industry must not become complacent and/or dependent on an ethnocentric Australian consumer and their apparent negative perception of imported prawns.

This suggests to us a clear need that the industry as a collective manages the quality of its products and capitalises on this with coordinated marketing strategies. We propose to investigate strategies to develop a stronger and more co-ordinated marketing strategy. Preliminary research conducted by the CERC has recommended this approach. Other, research recommends the development of a (AFPA) logo as recommended in the Consumer Research report (Peshanoff and Jaensch 2009). According to a University of South Australia study, prawns account for only 6 per cent of the market share of Australian seafood. There may be significant opportunities to grow this market share through marketing activities and unique product offering.

However, the Association is currently limited by a lack of funds, thus strategies need to be prioritised based on funding capacity or strategies be developed to secure additional funds. Current funding comes primarily from our yearly conference and memberships paid by prawn-farmers. Funding activities to support the development of the industry is an on-going concern. There is arguably not enough money in the Association for emergency funds and consequently we are very reliant on research and development to solve issues which can be bureaucratically slow and accordingly there can be significant lag-times before findings are implemented.

At this stage, we suggest a review of the current membership fee model, a discussion regarding a marketing levy, and the identification of other strategies to internally generate more income for the Association. For example, a central marketing body to represent all farms has significant potential. While each farm could still market their product, a marketing levy could increase exposure of our product. We see this as a critical issue for the short-term future of the industry and we encourage dialogue among our members regarding a marketing levy or other suggestions regarding other fund-raising approaches to support our marketing efforts and to build the financial capacity of the Association.

Quality needs to be a major focus to maintain price premiums for "Australian" product, but production improvements and poor demand has resulted in prices being driven down and farms selling to meet the market. This leads us to another central objective of the Association - to manage research and development to provide further production advantages. However, we need to acknowledge some potential internal challenges among the industry that may hinder the growth of our industry. This is discussed next.

## **Internal Industry Issues**

We see four key areas for attention in relation to the internal management of our industry. These are price management, knowledge sharing and standardisation of processes, compliance and workforce development. To date there has been little discussion focused on these issues. At this stage, the Executive would like to flag these issues for further discussion and closer attention as they may have significant implications for the overall growth and sustainability of the industry.



### **Price Management**

Adding to the competitive environment of the industry is the internal competition that can exist among prawn farmers. While a healthy competitive market place is a positive thing, in such a small industry regular undercutting of prices for short-term financial returns can have potentially negative consequences for all members of the industry. There has been little formal discussion regarding how to approach this issue and further discussions with members of the industry is necessary to begin to develop strategy to manage associated implications and problems in accordance with our legal obligations.

## **Knowledge Sharing and Standardisation**

We describe knowledge sharing as an industry member's ability to learn from contemporaries and the amount of support that industry members are prepared to provide their industry colleagues. While there are some strong positive relationships among members of our industry and knowledge sharing is common, our ability to share knowledge and learn from each other could be improved. There are significant benefits for all of us if we work together cooperatively. For example, it is likely it would strengthen our competitive position in our market.

While in the short-term there may be potential "risks" associated with knowledge sharing, and it is understandable and appropriate that if a farm that has invested heavily in R&D it may want to capitalise on its innovations. However the industry is small and fragmented and we collectively need to ensure that a high-quality product is consistently available for our consumers. At this stage, this issue is flagged for discussion and additional investigation.

In addition, to product development information sharing, the industry needs to understand employment trends, levels of production and have available other basic information that can support our ability to secure R&D funds and influence governmental legislative decisions. In addition, accurate, valid data is essential to support strategic decisions for the industry and can provide a better understanding of its overall health. Consequently we recommend that more data be collected from farms in these areas; however without the explicit cooperation of all members these efforts will be stifled.

A benefit of this cooperation may be the developing industry standards that would potentially improve our over product reliability and consumer confidence. This would also support our capacity to lobby government decisions and may support our overall industry wide return on investment.

## **Compliance**

Compliance is a key challenge for the industry. We need to ensure there are associated benefits for farmers who are compliant to centralised processes, pricing and quality approaches. The Association will begin to develop strategies to support compliance and to clarify benefits of a cooperative model to our members. However a level of trust and a willingness to work together is required from all of our members for collective strategies to work effectively.

## **Workforce Development**

A strong labour force is essential to support the development of a positive culture in the industry, one that is also competitive, unified and sustainable. Having enough experienced, qualified workers is an issue for the long-term viability of the industry. There is limited “hard-data” available about the current trends in the labour force. It is suggested that we are improving efficiency of production and the dollar output per labour unit employed in the industry has increased by 24 per cent from \$138,000 in 2007–08 to more than \$171,000 (Aquaculture production survey Queensland 2008–2009). This suggests we are getting more returns per employee but as an industry are we investing in our staff and the future of our workforce?

There are a number of internal issues in the industry that potentially require attention. The culture of the industry as a whole requires discussion. There appears to be a strong reliance on casual labour and in 2007-2008 reports show a decrease in permanent labour of 8 per cent. More recent data is not readily available but anecdotal information suggests this trend may be continuing.

It is currently difficult to attract and retain quality staff for many reasons (i.e. seasonal work, location challenges, high wages paid by competitive industries such as mining). Consequently it is critical that the industry begins to collectively address employment standards and develop strategies to ensure the industry is an attractive employment option. There may be opportunities to build stronger relationships between the industry and universities where potential graduates may

come from. Universities may also be able to support training initiatives for managers and owners across the industry,

It is also arguable there are only a few experienced individuals driving the industry and a loss of these people could drastically affect production. There is also arguably a lack of well trained middle management, and in general attitudes towards staff management, remuneration and work conditions would not be described as “best-practice”. Further, there is generally limited succession planning in the industry and few opportunities for development of the work-force.

There are implications for the industry as a whole if these labour issues are not addressed as we believe that the strength of the industry may be determined to a great extent by its labour force and this appears as an area the industry has paid little attention to. In our view, this is clearly a weakness of the industry that requires attention. At this stage we are suggesting commencing a discussion to identify issues associated with our labour force and to introduce strategies to remain competitive in the labour market by developing a strong-positive work culture that is attractive to potential employees.



#### **4.2 Objective #2: Provide a unified voice for the prawn farming industry in representations to government and other bodies**

One of our key activities is to provide a unified voice for the industry. As we are all well aware, prawn farmers are influenced by the planning and legislative actions of all three levels of government. The Association currently engages in many lobbying activities however, it is vitally important to keep continued pressure on government to reduce unrealistic conditions and legislative restrictions. In addition, an amplified voice for the industry through additional lobbying activities may help protect us against overseas competitors by supporting the enforcement of produce-origin sale information.

To strengthen our position in legislative decisions, it may be possible to build alliances with key government officials and other stakeholders such as research institutions (e.g. universities) and affiliated industry bodies (e.g. wild caught prawns and barramundi farmers). Other benefits here may include shared R&D developments. We will also continue to support this by identifying key government departments, positions and people and regularly update them on various aspects of the industry. In addition, inviting key decision-makers to industry events may help ensure that farmers are considered during policy formation.

Part of our role is also to support farmers by providing a central data-base of relevant information to facilitate the submission of development assessments and other relevant applications. Helping members comply with government regulations will benefit them and may decrease the government's requirement and inclination for formal compliance.

To support our position we recommend that the industry become more adept at self-regulation to manage quality and our internal activities. Effective internal regulation and standardisation of our processes will likely create more confidence and less scrutiny from government agencies.

#### **4.3 Objective #3: Promote and undertake, as necessary, research and development in the Australian prawn farming industry**

The Association recognises the importance of investing in R&D as a vehicle for a sustainable and profitable future. Research often creates research, as investigators find and suggest new topics and the Association needs to ensure research is focused on topics relevant to farmers (e.g. inter-relationships with the environment). It is the view of the Executive that current research and development activities supporting the industry requires review. There is currently little integration or accountability of R&D projects and there have been examples of expensive research projects that have not appeared to have had tangible effects on farmers' bottom line profit. Further, there are significant delays until outcomes of the research are implemented and there is little follow-up on the success of these interventions. While this is not always the case, we propose being more strategic with funds that are allocated for R&D to support our industry.

The industry should have a stronger influence on the type of research conducted and the expectations of the research outcomes. Implementing findings from good R&D should provide measurable production advantages and increase the quality of a farm's product and its yield, increasing output, revenue and net margins.

Therefore, we believe it is important to ensure that research projects are relevant and developed based on our specific needs. For example, developing clear priorities for researchers may be useful. Current examples of areas for research identified include:

- Brood-stock management
- Disease control
- Managing our environmental footprint above current best practice
- Low water exchange management
- Human resource strategies to improve the industries performance
- Marketing strategies to drive consumption
- New product innovations
- Peeling technologies (to reduce labour cost)
- Energy management

The Association would like to help all stakeholders (farmers, consumers, regulators and researchers) to create an environmentally sustainable and profitable industry. Currently, the R&D Plan is administered by the R&D Committee, who is elected at the AGM. R&D priorities are determined annually by members in a series of workshops and surveys, ensuring that R&D is relevant, dynamic and strategic. However, additional accountability of research outcomes needs to be developed. It is also the view of the Executive that the R&D committee needs more structure and training and the Executive members should play a stronger mentoring role with the members of the R&D group.

We believe that a strategic review of KPI's prior to project acceptance be conducted. Perhaps the creation of a "Research Registry" that collates industry information and pro-actively directs research would be beneficial. Better communication between the Executive committee and the R&D committee has also been flagged as an area for improvement. Additional strategies will be developed to support the improvement of research outcomes and project direction.



#### **4.4 Objective #4: Promote the development of prawn farming as an environmentally sustainable industry.**

It is important the Association creates and manages the correct perception that the industry is environmentally friendly and environmentally conscious. One of the key issues here is relevant and reliable data. By acting as the main coordinator and administrator of all data and research, the Association can distribute and market all developments related to prawn farming, helping shape opinions of the industry. For example, releasing data to environmental groups on the depletion of wild stock levels versus the lower ecological impact of farming raises awareness that farming helps protect the marine environment (according to the principles of Ecologically Sustainable Development).

The Association is helping farms achieve certification and eco-labelling from eco-groups (Enviro Action ISO 14001 certification), recognising their eco-friendliness. The Association could also align with other relevant organisations for recognition of sustainability accreditation. A continued focus on environmental management is likely to have important benefits for the industry as a whole.

#### **4.5 Objective #5: To foster and promote goodwill amongst members of the Association in furtherance of its objects.**

It is the goal of the Association to build a collegiate culture among members. We have discussed above some of the internal issues facing the industry and it is the Association's role to facilitate relationships among members. The AGM is one of the key activities of the Association to increase members' involvement. Other strategies to improve communication among members and the Association are being developed. Currently the Association's member rate is an excellent 90 per cent of industry participants. However, the Association acknowledges the need to communicate more effectively with its members and to increase its role in facilitating communication among prawn farmers. We propose to improve the content and management of our web-site as well as increase the frequency of communication with our members.

## **5. Recommended Strategies**

The recommendations presented below are “high-line” and provide a general focus for the Association during the next 12 months. Due to resource limitations, the Association will review and prioritise these recommendations and will develop specific actions for recommendations that are considered of the highest priority. The recommendations presented below are linked to specific objectives, however in some cases, recommendations may influence multiple Association objectives.

### **5.1 Strategies from Objective #1: Promote and support all aspects of the Australian prawn farming industry:**

1. Develop more coordinated and effective industry-wide marketing practices
2. Increase the point of origin awareness for consumers
3. Develop centralised data collection and quality control processes
4. Table industry discussion regarding pricing, knowledge sharing and standardisation
5. Develop compliance mechanisms to ensure benefits for farmers in cooperative
6. Develop strategies to ensure the industry is an attractive employment option
7. Develop relationships with appropriate Universities to support staffing, training and R&D
8. Clarify our relationship with the wild-caught industry

### **5.2 Strategies from Objective #2: Provide a unified voice for the prawn farming industry in representations to government and other bodies:**

1. Continue to build alliances with key stake-holders to reduce unrealistic conditions and legislative restrictions
2. Identify key government officials, government departments, research institutions and affiliated industry bodies
3. Keep continued pressure on all three levels of government
4. Support the enforcement of produce-origin sale information
5. Share R&D developments with all stake-holders

**5.3 Strategies from Objective #3: Promote and undertake, as necessary, research and development in the Australian prawn farming industry:**

1. Ensure R&D activities are relevant and developed based on farmers specific needs (increasing accountability, ensuring tangible effects on farmers profit)
2. Creation of a “Research Registry” (that collates industry information and pro-actively directs research)
3. Measure uptake of research recommendations
4. Measure impacts of research outcomes
5. Improve communication between the Executive committee and the R&D committee

**5.4 Strategies from Objective #4: Promote the development of prawn farming as an environmentally sustainable industry:**

1. Manage and collect data that reinforces the environmental efforts of the industry
2. Provide support to farms to achieve certification and eco-labelling from eco-groups
3. Align with other relevant organisations for recognition of sustainability accreditation

**5.5 Strategies from Objective #5: Foster and promote goodwill amongst members of the Association in furtherance of its objects:**

1. Increase members’ involvement in and connection to the Association
2. Improve and encourage the sharing of knowledge and technology
3. Increase frequency and form of communication from the Executive to members
4. Develop strategies to facilitate the communication among Association members

Funding is clearly a key limitation of our capacity to manage the recommendations presented above. Thus, we also present some general recommendations to begin discussing additional funding opportunities.

**5.6 Strategies to Increase Funding (needed to achieve Objectives 1 to 5):**

1. Review the number of classes of membership and the fee structure
2. Encourage dialogue among members regarding a marketing levy
3. Apply for additional grant funding
4. Develop and deliver training

## 6. Recommended Actions for Next Executive Meeting

- Sort issues and strategies into a priority list
- Allocate financial and human resources to key priorities
- Assign Executive and Committee members to control each issue and strategy



## 7. Measures of Success and Accountability

Below we present preliminary key success measures for the Executive group. These measures will be further developed based on the priority given to specific strategies. However in general, the measures listed below are the primary areas that the Executive will attempt to influence to support our key objectives.

The key measures of success for the Association are to *increase*:

1. Australian per-capita consumption of Australian farmed prawns
2. Membership in Association
3. Data collected from members
4. Assistance, support and mentoring provided to members
5. Communication with members
6. Communications with relevant stakeholders (regulators, related industry associations)
7. Our media presence
8. Number of R&D papers produced
9. Uptake of recommendations from R&D
10. Impact of R&D on industry through updated priorities list and tighter accountability

## 8. Conclusion

This report clarified the purpose and values of the Australian Prawn Farm Association. It identified its five key objectives and some specific issues facing the industry. Twenty-nine recommendations were presented to provide strategic direction and 10 competency measures were listed as starting points for clearer accountabilities for the APFA Executive group. Additionally there were three recommended actions for the next Executive meeting:

- Sort issues and strategies into a priority list
- Allocate financial and human resources to key priorities
- Assign Executive and Committee members accountability for key priorities

The need for more funds was identified by the Executive as a prerequisite to the development of a strong Prawn Farming Association that is able to assist farmers. The lack of resources limits the extent of marketing activities the Association can engage in. The Association also supports the industry through lobbying at political events, and will regularly engage and support farmers where possible. For example there are significant opportunities to leverage off research and development activities.

More specific accountabilities and strategies will be developed after discussions with members at the 2011 Annual General Meeting. Feedback received from members will drive the focus of the Executive over the next 12 months.



## Appendix One - Contacts and Links

### Industry

- Australian Aquaculture Portal (NAC) – [www.australian-aquacultureportal.com](http://www.australian-aquacultureportal.com)
- Fisheries Research and Development Corporation (FRDC) – [www.frdc.com.au](http://www.frdc.com.au)
- Food and Agriculture Organisation (FAO) - [www.fao.org/fishery/publications/yearbooks/en](http://www.fao.org/fishery/publications/yearbooks/en)
- Gippsland Aquaculture Industry Network Inc – [www.growfish.com.au](http://www.growfish.com.au)
- Inland Aquaculture Association of South Australia Inc – [www.iaasa.org.au](http://www.iaasa.org.au)
- Marine Stewardship Council - [www.msc.org](http://www.msc.org)
- Queensland Aquaculture Industries Federation (QAIF) – [www.aquaculturequeensland.com/QAIF.htm](http://www.aquaculturequeensland.com/QAIF.htm)
- Queensland Farmers Federation (QFF) - [www.qff.org.au](http://www.qff.org.au)
- Seafood Cooperative Research Centre (Seafood CRC) – [www.seafoodcrc.com](http://www.seafoodcrc.com)
- Seafood Services Australia (SSA) - <http://seafoodservices.com.au> , [www.seafood.net.au](http://www.seafood.net.au)
- The Fish Site – [www.thefishsite.com](http://www.thefishsite.com)
- Trade Map - [www.trademap.org](http://www.trademap.org)

### Government

- Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) – [www.abares.gov.au](http://www.abares.gov.au)
- Austrade - [www.austrade.gov.au](http://www.austrade.gov.au)
- Australian Bureau of Statistics (ABS) - [www.abs.gov.au](http://www.abs.gov.au)
- Commonwealth Scientific and Industrial Research Organisation (CSIRO) – [www.marine.csiro.au](http://www.marine.csiro.au)
- Department of Agriculture, Fisheries and Forestry – [www.daffa.gov.au](http://www.daffa.gov.au)
- Government of NSW – [www.fisheries.nsw.gov.au/aquaculture](http://www.fisheries.nsw.gov.au/aquaculture)
- NSW Department of Primary Industries (DPI) - <http://www.dpi.nsw.gov.au/fisheries/aquaculture/committees/arac>
- Government of Queensland – [www.aquaculturequeensland.com](http://www.aquaculturequeensland.com)
- QLD Department of Employment, Economic Development and Innovation (DEEDI) – [www.deedi.qld.gov.au](http://www.deedi.qld.gov.au)
- Government of South Australia – [www.pir.sa.gov.au](http://www.pir.sa.gov.au)
- Government of Tasmania – [www.dpiw.tas.gov.au](http://www.dpiw.tas.gov.au)
- Government of Victoria – [www.dse.vic.gov.au](http://www.dse.vic.gov.au)
- Government of Western Australia – [www.aquaculturecouncilwa.com](http://www.aquaculturecouncilwa.com)