National Primary Industries Research, Development & Extension Framework

INDUSTRY PROFILE

ABARE – Australian Fisheries Statistics 2008

2007/08	Licences / Entitlements	Tonnes	$,000
Commonwealth	2393	52,227↓	288,454↓
NSW	1986	14,565↓	82,114↓
N T	270	5,937↑	32,948↑
Qld	2861	23,405↓	203,126↓
SA	761	40,804↓	205,967↓
Tas	934	6,784↓	156,700↓
Vic	812	6,390↑	67,750↓
WA	584	28,288↑	325,607↓

National Primary Industries Research, Development & Extension Framework

TRENDS

- Declining production
- Increasing value ($/kg) – other than export dominated states / products
- Resource re-allocation away from food production to recreation
- Move towards value added product not commodity – Corporatised businesses and vertical integration
- Environmental credentials
- Increasing regulation
- Increasing production costs

National Primary Industries Research, Development & Extension Framework

NEEDS

- Establish industry controlled entity that drives investment in **R**esearch, **D**evelopment, **E**xtension, **M**arketing & **P**romotion (Parties)
- **R**, **D**, **E**, **M** & **P** planning driven upwards from a sector / regional approach (3(c))
- Service entities driven by efficiency and expertise, not principles of sovereignty and the need to maintain facilities or capacities at a local / regional level (2(c) & (e), 3(d))
- Improved economic and business performance
- Product development - Add value to high volume finfish products
- Greater understanding of markets and market development.

National Primary Industries Research, Development & Extension Framework

NEEDS

- States and Territories to maintain their investment in R & D (e.g. matching levy contributions)
- Adopt improved processes for identifying R&D needs – sector to national
- Management systems that improve industry capacity
- A capacity for better extension and innovation of research and development
- Build industry capacity to adopt improvements
- Workforce resources - planning and management.