



Implementing and Evaluating the Australian Seafood Trade Agenda 2016 - 2018

Seafood Trade Advisory Group

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September 2018

FRDC Project No 2016/257

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ISBN 978-0-9876352-0-4

Implementing and evaluating the Australian Seafood Trade Agenda 2016 - 2018
2016-257

2018

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Acknowledgments

Colin Buxton, Chair of SRL Ltd

Dean Lisson, Chair of Abalone Council Australia Ltd

Justin Phillips, Executive Officer of SRL Ltd

Tom Cosentino, Executive Officer of SRL Ltd

Nathan Maxwell-McGinn, Exporter and Chair of the STAG

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Abbreviations

AAA	Abalone Association of Australasia
ACA	Abalone Council Australia Ltd
AUSTRADE	Australian Trade Commission
CHAFTA	China Australia Free Trade Agreement
DAWR	Department of Agriculture and Water Resources
DFAT	Department of Foreign Affairs and Trade
FRDC	Fisheries Research and Development Corporation
JAIPA	Japan Australia Economic Partnership Agreement
SECC	Seafood Exporters Consultative Committee
SIA	Seafood Industry Australia
SRL	Southern Rock Lobster Pty Ltd
STAG	Seafood Trade Advisory Group

Executive Summary

Australian seafood exports continue to grow steadily with the top 5 exporting sectors accounting for 87% (by value) of trade. Key markets for Australian seafood exports are in the Asian region (China, Japan, Hong Kong, Singapore and Vietnam). These top 5 markets represent about 90% of total exports (by value).

With the signing of the FTAs with Korea, Japan and China it was expected that more and more product would be exported directly to these markets with consequent changes to the patterns of trade in the short to medium term. As the tariffs in these markets come down, other barriers (such as non-manipulation certificate, approved species lists, deemed values, customs clearance procedures etc) are likely to emerge. The Seafood Trade Advisory Group (STAG) was established by the Abalone and Rock Lobster industries to ensure these barriers are quickly dealt with if they do emerge and that efforts to increase direct trade with China are sustained.

The aim of this project was to continue the work of the STAG, started as part of the Australian Seafood CRC, by building industry expertise and capability to determine trade and market access priorities, and to work with the government to resolve them. A collaborative effort to research and monitor market trends to provide exporters with information to avoid trade disruptions and take advantage of opportunities was also a core function of the STAG.

This report details the activities and achievements of the STAG for the period 2016 to 2018 including:

1. Consultation with seafood exporters and industry associations to determine and agree on trade and market access priorities for inclusion in the *Seafood Trade and Market Access Agenda and Action Plan 2016-2018* (see Appendix 2).
2. Maintaining government relationships and providing seafood input to the priority trade and market access negotiations
3. Communicating with stakeholders (industry, government and communities) about progress addressing the seafood industry trade and market access priorities.
4. Researching and monitoring market and consumer trends in key markets providing a market intelligence service to seafood exporters
5. Developing and maintaining relationships with key organisations (industry, research and government) in key markets to facilitate resolution of trade and market access issues and to maintain existing market access.

A suite of resources has also been developed and a website established accessible by all seafood exporters. All resources and market intelligence outputs are available on the website (a list of these is at Appendix 3). Go to www.seafoodtradeadvisory.com

A key achievement of the STAG has been the recognition, by industry and government, as a unified cohesive source of industry knowledge and expertise able to provide timely support to trade and market access negotiations and resolving trade disruptions. Specific achievements against the priority issues are detailed in the report.

The STAG project has developed partnerships between government and industry such that if trade and market access issues emerge they can be quickly assessed and actions agreed – with industry expert input.

Importantly the STAG is ‘issues based’ driven by the exporters. This helps ensure that the focus is on the issues that provide the most benefit and the largest return on investment for both industry and government.

As it is expected that the export market for Australian seafood is continuing to be challenging it is recommended that the STAG work to expand its membership and investment partners. Funding should be continued for a further 3 years to:

- Increase engagement with peak industry bodies to ensure unity and amplification of messaging
- Consult with investment partners and develop a new Seafood Trade Agenda and Action Plan for 2019-2022
- Conduct a Seafood Exporters Forum to extend the outputs of this project and to gain a wider input to the future priorities and action plan
- Improve the market intelligence system to include broader sources of data and information (particularly Chinese language sources) and integrate with the FRDC Trade Portal
- Continue to provide a credible source of industry expert advice and provide rapid responses to trade disruptions.

Keywords

Trade, Markets, Southern Rock Lobster, Abalone, China, Japan, CHAFTA, JAEPA

Introduction

According to ABARES (<http://www.agriculture.gov.au/abares/research-topics/fisheries/fisheries-data>) the value of Australian fisheries and aquaculture production in 2012-13 was around \$2.4 billion each year. Of this, Australia exported around \$1.2 billion of seafood products annually, dominated by high-value products such as rock lobster, premium tuna species and abalone. At that time ABARES also predicted that export earnings from Australian fisheries products would increase by 11 per cent in 2015-16 to around \$1.6 billion, following an estimated rise of 10 per cent to \$1.4 billion in 2014-15.

The Asian market for Australian seafood is among the most developed of any Australian agriculture and food exports. In 2012-13 Australia's major seafood export destinations were Hong Kong (\$317million), Vietnam (\$293 million), Japan (\$236million), China (\$45million) and Singapore (\$31million), which together accounted for 92 per cent of the total value of Australian seafood exports.

The abalone and rock lobster industries dominate this trade which in 2014 was estimated to be worth more than \$750 million annually and estimated to contribute \$1.3 billion to Australia's GDP while providing employment for 8500 people in rural and regional areas. Abalone and rock lobster exporters have built strong trade relationships with mainland Chinese importers, enabling them to build and increase their market within China. The recent Free Trade Agreements with China, Japan and Korea are critical to the continued development and expansion of Australia's valuable seafood trade.

The Seafood Trade Advisory Group (STAG) was initially set up, with the support and financial assistance of the Australian Seafood CRC and FRDC, by major exporters of Southern Rock Lobster (SRL), Western Rock Lobster (WAFIC) and Australian wild harvested abalone (ACA). The STAG formulated a unified position on industry's initial priorities focused on supporting favourable conclusion of the China Australia Free Trade Agreement (ChAFTA). These priorities were outlined in the "Australian Abalone and Rock Lobster Trade Agenda 2013-2015" with activities focused on effectively communicating these priorities to Australian and Chinese governments.

Key achievements from the 2013-2015 Seafood Trade Agenda include:

1. Recognition and acknowledgement by Australian government of the role of Australian abalone and rock lobster industries in terms of their:
 - a. contribution to Australia's reputation for premium food in Asia
 - b. importance to rural and regional economies by providing jobs and development opportunities for service industries
 - c. contribution to Australia's - GDP generating in excess of \$600m of export income annually
2. Effective communication of industry ChAFTA priorities, with supporting economic impact studies, for abalone and rock lobster to Australian chief negotiators resulting in a favourable outcome for those sectors
3. Clarification of the process and preparation of an application seeking changes to Chinese food standards to enable export of canned abalone containing SO²
4. Recognition of the Seafood Trade and Advisory Group by the Australian Government ministers and agencies as a source of credible and representative views

Since the establishment of the STAG and the Trade Agenda 2013-2015, the Australian Government has concluded the Korea Australia FTA, the Japan Australia Economic Partnership Agreement and the China Australia FTA. The conclusion of the negotiations and the entry into force will provide enormous opportunities to grow Australian seafood exports direct to markets, however such growth is likely to be accompanied by increasing trade and market access issues. Some of these issues may be relatively simple to address however others may be more complex requiring technical, economic and policy research support to address them.

Need

Australian seafood exporters still face a number of formal technical (e.g. SO₂ in canned abalone) and informal systemic barriers (e.g. deemed value) to trade which still add cost and complexities which in the longer term could result in the opportunities created in the recent conclusion of a suite of FTAs with Asian markets not being fully realised.

The 2014 Seafood Exporters Forum (45 exporters participated) agreed to continue the STAG to continue to focus on key priorities for the most important markets (China, Hong Kong and Japan). Other sectors were invited to join the STAG provided they support the STAG activities with resources and communicate according to the agreed key messages (outlined in the STAG Trade Agenda).

Research on macro-economic trends in important markets and potential FTA implementation issues that may impede capitalisation on the opportunities provided by those FTAs are reflected in the agreed Seafood Trade Agenda priorities for 2016-2018 (Appendix 2). Having a unified voice on these priorities and addressing issues as they arise is the cornerstone of the success of the STAG to date.

The STAG needs to coordinate communication and extension of research as well as continue to prioritise research priorities to keep access to global markets. As a relatively new group, the STAG needs to formalise partnership arrangements that includes more industry sectors, implement a governance structure and establish a more stable funding base, including the establishment of a secretariat with capacity to respond to issues and responsibility for implementing and reporting on the Trade Agenda.

This project provided the co-contribution agreed for the Program Assisting Small Exporters (PASE) funded Seafood Asian Seafood Market Access Project and focused on ensuring that the outcomes of the PASE project were communicated and extended effectively to industry and that industry issues are communicated back to the project team. A new governance and reporting arrangement for the STAG was needed to ensure industry trade and market access issues and priorities are communicated effectively and to support a transition of the responsibility for the STAG to Seafood Industry Australia – the recently established national peak industry body.

Objectives

The objectives of the project were to:

1. Support Australian government trade liberalisation and seafood exporters objectives by coordinating action on priority issues identified in the Seafood Trade Agenda and Action Plan 2016-2018
2. Formalise STAG partnership and governance arrangements, and develop a pathway for the establishment of a Seafood Trade Advisory Group as part of the newly forming national peak industry body
3. To establish the capacity to monitor and respond to non-technical trade and market access issues that arise outside of the Trade Agenda and Action Plan 2016-2018

Methods

The Seafood Trade Advisory Group activities were funded by the Southern Rocklobster Pty Ltd (SRL) and Abalone Council Australia Ltd (ACA) through their Industry Partnership Agreements with the Fisheries Research and Development Corporation. The secretariat function for the STAG was undertaken by Honey & Fox Pty Ltd under the guidance of the STAG Executive Group.

The key activities undertaken to address the project objectives were:

1. Formalisation of the STAG Executive Group comprising Justin Phillips (SRL) – replaced by Tom Consentino in April 2018 – Dean Lisson (ACA) Nathan Maxwell McGinn (STAG Chair) and Wayne Haggar (Deputy Chair).
2. Implementation of seafood trade and market access priorities as outlined in the Seafood Trade Agenda and Action Plan 2016-2018. This includes regular communication with Australian government ministers and officials with responsibility for trade negotiations and for resolution of trade and market access issues.
3. Development of a market intelligence system and communication mechanisms to support engagement with seafood exporters and help ensure input to the STAG trade agenda and priorities.
4. Development of draft governance and reporting arrangements for consultation with current and potential investment partners.
5. Establishment and support for STAG working groups (the Asian Markets Working Group and the SO₂ in Abalone Working Group)
6. Liaison with the core investors (SRL, ACA and FRDC) to ensure that STAG activities are aligned with industry trade and market access policies and strategies and to amplify STAG communications.
7. Where possible identify trade and market access issues in common with other primary sectors and pursue opportunities to collaborate with them.
8. Manage a trade and market access research need and prioritisation process and submit to the investors for consideration
9. Establish a working relationship with Seafood Industry Australia and other industry peak bodies to determine how the STAG can integrate with their activities and priorities and provide a broader trade and market access service to members.
10. Evaluate the effectiveness of the STAG operations and make recommendations for improvement.

Results and Discussion

Exports of Australian edible seafood continues to grow steadily with the top 5 exporting sectors accounting for 87% (by value) of trade. Trends since 2012-2013 are summarised in Table 1 below:

Table 1: Australian edible seafood exports by value \$'000 (Source: ABARES)

	2012-13	2013-14	2014-15	2015-16
Rock Lobster	\$447,263	\$590,293	\$691,232	\$693,199
Abalone	\$185,996	\$170,043	\$173,753	\$181,982
Prawns	\$51,797	\$100,976	\$94,166	\$114,383
Tuna	\$162,636	\$135,539	\$150,993	\$163,255
Salmon	\$25,402	\$17,396	\$48,142	\$79,936
Total top 5	\$873,094	\$1,014,247	\$1,158,286	\$1,232,755
Fish	\$34,179	\$34,216	\$37,736	\$74,333
Crab	\$8,155	\$5,534	\$7,948	\$7,614
Scallop	\$10,792	\$13,576	\$10,674	\$11,698
Others	\$40,171	\$32,491	\$43,691	\$54,820
Total others	\$93,298	\$85,817	\$100,048	\$148,465
Total Exports (Edible)	\$1,002,341	\$1,138,348	\$1,292,656	\$1,418,323
top 5	87%	89%	90%	87%
others	9%	8%	8%	10%

As predicted by ABARES there has been continued growth in Australia's edible seafood exports of almost 10% year on year. The top five exported products each experienced growth with Salmon exports growing by nearly 100%.

The patterns of trade are changing with almost 100% growth in "other fish" exports in 2015-16 compared to 2014-15.

This growth reflects the efforts by industry to introduce lesser known species to export markets as well as evidencing increased demand generally from the expanding middle class in Asia.

Table 2 (below) summarises Australian seafood exports by destination. There has been more than 100% growth in the value of seafood exports going direct to China, with consequent reductions in exports to transshipment ports. Five countries still account for almost 90% of Australia's seafood exports.

Export markets are also becoming more diversified with strong growth in exports to the USA and to "other markets" which experienced more than 200% growth.

Table 2: Top 5 export destinations by value for Australian seafood \$'000 (Source: ABARES)

	2012-13	2013-14	2014-15	2015-16
China	\$45 193	\$36 588	\$48 685	\$104 649
Hong Kong	\$317 017	\$208 934	\$192 347	\$233 663
Japan	\$236 010	\$192 114	\$192 062	\$205 332
Singapore	\$30 998	\$34 203	\$34 981	\$35 275
Vietnam	\$293 217	\$565 646	\$715 600	\$681 689
Total top 5	\$922 435	\$1 037 485	\$1 183 674	\$1 260 608
Total edible exports	\$1 002 341	\$1 138 348	\$1 292 656	\$1 418 323
% top 5	92%	91%	92%	88%

Understanding the commercial decisions for the changes in trade patterns is critical for both government and industry to support trade and market access policy setting that will support further export growth. Any growth in exports will need to be underpinned with a vigilance by industry and governments to ensure that hard won market access is maintained and new markets opened. As tariffs fall new non-tariff barriers are expected to continue to emerge.

Formalisation of the STAG Executive Group

The STAG Executive Group was formed comprising Justin Phillips (SRL) – replaced by Tom Consentino in April 2018 – Dean Lisson (ACA) Nathan Maxwell McGinn (STAG Chair) and Wayne Haggar (STAG Deputy Chair). This group provided general oversight for STAG activities, including liaison with Australian Government Ministers and officials with responsibility for trade negotiations and for resolution of trade and market access issues.

Communication and implementation of the Seafood Trade Agenda and Action Plan (2016-18)

Honey & Fox Pty Ltd provided the secretariat to the STAG and was responsible for communication and implementation of the Seafood Trade Agenda and Action Plan 2016-2018. An implementation progress report was published in August 2017 and again in August 2018. Copies of these reports are provided at Appendices 4 and 5 respectively.

Progress against the Seafood Trade Agenda priorities

Priority 1: China FTA, Japan EPA, Korea FTA implementation

Since 2017 the STAG has been monitoring the trade flows between Australia and China, Korea and Japan. A major issue of concern has been the list of approved species for import to China which excludes many products from the market. It is still unclear as to how to get the list changed however the STAG is working closely with the Department of Agriculture and Water Resources and their Seafood Export Consultative Committee to prioritise and resolve issues. The FRDC is coordinating a process around the prioritisation with the STAG providing advice and assistance as required.

The STAG will maintain a watching brief on these and any other emerging issues related to market access to China, Japan and Korea – noting that the core partners are Abalone Council Australia and Southern Rock Lobster.

There is a continued increase in direct trade with China by both Abalone and Rock Lobster. This trend is expected to continue as ChAFTA reaches full implementation.

Priority 2: Deemed value in China

There have been no reports of deemed value issues. There have been some periodical documentation issues that have largely been dealt with on an individual case by case basis. The STAG will continue to maintain a watching brief on deemed values and other documentation issues.

Priority 3: TPP and other trade agreements/negotiations

The STAG continues to provide input to trade negotiations, maintaining direct contact with Ministers offices and departmental officials. The STAG will continue to work closely with Seafood Industry Association (SIA) and the FRDC to ensure that key messages about priorities are communicated.

Priority 4: Emergency preparedness

There has been no action on this priority. It will remain on the agenda and will be considered by the partnership group for funding during 2019

Priority 5: Chinese customs clearance

From time to time there have been some disruptions to trade at the border in China. Most of these have been resolved quickly and were a result of a difference of interpretation of customs requirements and/or changes in practices. The STAG will maintain a watching brief – particularly in relation to customs clearance times and office opening hours.

Priority 6: Import licencing

This has largely been resolved with improved transparency regarding import licencing in China. The partnership group will consider whether this issue needs to remain on the priority list.

Emerging issues

STAG monitors trade and market access issues in the priority markets. Several issues arose during the period of this project however most were confined to specific products or specific ports and were able to be resolved at that level. There is one significant issue that is likely to take a concerted and united effort to resolve – the China approved import list.

China approved import list

China has issued a list of species (chilled, frozen and other formats) that are approved for import to China from Australia. There are several problems with the list as it currently stands:

1. There are species that have a history of legitimate trade with China but are no longer included in the approved list
2. Some species can be exported in a specific format which is not necessarily the format we produce eg oil products can be exported but not chilled or frozen format of the same species
3. Some species are approved for export from Australia but are not actually fished or produced here.
4. There are species which have no history of trade but have a potential market in China but cannot be further explored as they are not on the approved list

5. China has developed a list for each country however there are inconsistencies between exporting countries.

DAWR has asked the industry to prioritise species for action. Those that have a history of trade prior to 2012 but are not on the list are being actioned as a first priority. This is because that is what the Chinese authorities have advised must be done. Due to a reorganisation in responsibilities of different government organisations in China it has been difficult to progress to resolution.

The FRDC is currently taking the lead on this and has undertaken a survey of industry to develop a prioritised list. The prioritised list is currently being considered by the Department and has not been shared with industry.

The STAG has worked to establish relationships with government and industry organisations in China and remains available to assist in progressing a resolution to the issue if required.

Sectoral Priorities - Abalone

SO2 in canned and pouched abalone

The STAG has worked with SafeFish, (who have developed the technical case to support negotiations with China to adopt the codex standard covering the use and volumes of SO₂ in preserved, canned, pouched Abalone) to develop partnerships with key organisations in China to assist with achieving the required change in Chinese food standards. The focus now will be on solidifying these partnerships to understand how to successfully apply for food standard changes and to work with technical experts in China to demonstrate the safety of the Codex standards in the Chinese population (given their specific consumption and use patterns).

Takobushi

The STAG successfully worked with the Department of Agriculture and Water Resources and the staff at the Australian Embassy in Japan to achieve recognition and acceptance by Japan of Roei and farmed Australian Abalone under their scientific Abalone species, allowing labelling and domestic selling as such.

NB: Creating and maintaining these relationships with organisations in China and Japan is a critical element of the adoption pathway for RD&E associated with trade and market access to China. Therefore, core STAG funds have been used for this. Technical and policy papers needed for the next stage of negotiation will need support from the Abalone industry. At the time of writing this report separate project proposals are being prepared.

Market intelligence system

Honey & Fox Pty Ltd developed and managed a market intelligence system comprising:

- STAG Rapid Alerts
- STAG News Bites
- Seafood Trade Matters Newsletter
- Information extended via Twitter

A website was established to provide STAG members with easy access to information, reports and resources. The website www.seafoodtradeadvisory.com has copies of all communications and reports produced by the STAG as well relevant reports and information provided by others.

A general email was established and promoted on the website to enable STAG members to seek advice and assistance on their individual issues and/or to report disruptions to trade.

Governance and reporting arrangements

Draft governance and reporting arrangements were developed and discussed with SRL and ACA. This in turn has been used as a basis for consultation with current and potential new investment partners.

Figure 1: The draft governance model



STAG Working Groups

It was agreed to form two STAG working groups (the Asian Markets Working Group and the SO₂ in Abalone Working Group).

Nominations were called for membership of the Asian Markets Working Group however it was suggested that, as the majority (if not all) STAG members were involved in exporting to Asia and the market intelligence service focused reporting on those markets, it was not necessary to form a working group at this time. It was also agreed that a better approach was to form a working group when an issue that required intervention arose. This is a basic operating principle of the STAG.

The SO₂ in Abalone Working Group is chaired by Mark Webster (Chair of the Australasian Abalone Association). The Working Group has worked with SafeFish to develop a technical case to back up the discussions with key groups in China while the STAG provided support to the Working Group by coordinating technical exchange visits (funded by DAWR) to meet with industry organisations and researchers who can potentially assist with gaining approval for the use of SO₂ in canned abalone destined for the China market.

STAG Investor liaison

While most of the communication and liaison with STAG investors was via the regular News Bites and newsletter there were also direct discussions and consultations the core investors (SRL, ACA and FRDC). This helped to ensure that STAG activities are aligned with industry trade and market access

policies and strategies. This liaison also assisted with amplifying STAG communications as key messages were also communicated to stakeholders via other channels. Regular written progress reports were also provided.

Working with other primary industry sectors

The current seafood trade and market access priorities are unique to the industry however to promote these priorities in the context of other sectors the STAG partners and members participated in cross sectoral trade and market access meetings and discussions.

Research needs and priorities

The STAG identified the need for research to support amendments to the Approved Seafood List for import to China (see above). An application was developed in partnership with Seafood Industry Australia and submitted to the Australia China Agriculture Cooperation Agreement fund. While this funding was not successful, the Department of Agriculture and Water Resources has funded a project with FRDC to develop a prioritised list and to send a technical delegation to China. FRDC is managing the process with input from the STAG.

The STAG is currently working with SafeFish, ACA and AAA to develop a research project to further develop the technical case and industry relationships needed to submit a proposal to amend the China Food Standards to permit the use of SO₂ in canned and preserved Abalone. When finalised, this proposal will be funded by the Fight Food Waste CRC and FRDC.

The economic studies undertaken by the Australian Seafood CRC in 2013 /2014 need to be repeated to provide up-to-date data on the value and importance of the seafood export industry to the Australian economy. This will support the development of the benefit cost case for input to seafood trade and market access negotiations.

Industry peak body relationships

To ensure transparency and continuation of unified messaging and engagement between industry and governments on trade and market access issues, the STAG has been in discussions with Seafood Industry Australia (SIA) since its establishment. The STAG investment prospectus 2018-2021 was submitted to the SIA Board for consideration. The Board supported the STAG/SIA proposal to work together on the China approved list (see above) but declined to invest any cash. It has been agreed to continue to work together to gradually incorporate the STAG activities with SIA to address trade and market access issues.

The STAG has also worked with the NSW Professional Fisherman's Association to support their exploratory work on developing export markets for eels in China and Japan on behalf of their members.

Discussions have been held with Western Rock Lobster Council (WRL), seeking their support and investment in the STAG. WRL Council is now considering their position and has provided a positive indication that it may invest in the STAG. These discussions are ongoing at the time of writing.

The STAG has formalised their relationship with the Seafood Exporters Consultative Committee (SECC) that provides advice to the Department of Agriculture and Water Resources on technical issues associated with seafood trade. The STAG now attends the SECC meetings as a member. This ensures more open and transparent communication between the SECC and the STAG and will support ongoing collaboration on trade and market access issues. The first of these is the China List of Seafood Species Approved for Import from Australia (see discussion above). The STAG has provided input and advice regarding the translation and interpretation of the list as well input to the prioritisation of the species for resolution.

Conclusion

International trade and market access is continually evolving with changes to Australian export legislation on the horizon together with new and emerging issues in key seafood export markets increasing the imperative for the Australian seafood exporters to work together and present a united front.

The STAG has managed to provide a conduit for engagement with the seafood industry on export matters. The creation of the market intelligence system has provided exporters with easy access to information about consumer trends, competitor behaviour and government decisions that impact on and provide opportunities for Australian seafood exporters.

The formation of SIA provides an opportunity for the STAG message to be amplified and in particular to be communicated effectively with government.

Importantly working together, the members of the STAG have communicated cohesive and united messages to support international trade negotiations and have provided a level of technical detail that was previously absent in those negotiations.

Further work by the STAG to engage with additional exporters, to expand the market intelligence service and to formalise the governance arrangements will help maintain existing and expand trade and market access. Efforts should also continue to bring the STAG and the SIA closer, to integrate with the FRDC trade research and development efforts and to streamline trade and market access communications generally. The STAG is an effective group with a proven track record to help achieve this.

Implications

The STAG project has helped achieve trade and market access outcomes for existing and emerging seafood exporters. Importantly it has developed partnerships between government and industry such that if issues emerge they can be quickly analysed and actions agreed – with industry expert input.

Importantly the STAG is 'issues based' and driven by the exporters. This helps ensure that the focus is on the issues that provide the most benefit and the largest return on investment.

Recommendations

As it is expected that the export market for Australian seafood is continuing to be challenging it is recommended that the STAG work to expand its membership and investment partners. Funding should be continued for a further 3 years to:

- Increase engagement with peak industry bodies to ensure unity and amplification of messaging
- Consult with investment partners and develop a new Seafood Trade Agenda and Action Plan for 2019-2022
- Conduct a Seafood Exporters Forum to extend the outputs of this project and to gain a wider input to the future priorities and action plan
- Improve the market intelligence system to include broader sources of data and information (particularly Chinese language sources) and integrate with the FRDC Trade Portal

- Continue to provide a credible source of industry expert advice and provide rapid responses to trade disruptions.

Extension and Adoption

The STAG has produced a number of resources for seafood exporters (both experienced and emerging). These have all been made available on the dedicated STAG website www.seafoodtradeadvisory.com and have been promoted to the STAG membership via direct email and through the partner organisations – ACA, SRL Ltd and FRDC.

STAG has implemented a 3-tier communications system:

1. Rapid alert for when action is required by exporters
2. Monthly News Bites providing summaries of Chinese language media relevant to Australian seafood exporters (consumer trends, competitor activities and government decrees).
3. A quarterly newsletter to provide more in-depth coverage of particular issues and topics. FRDC and SafeFish are invited to provide articles for inclusion in the Seafood Trade Matters newsletter.

Many of the trade agenda issues have been successfully addressed by the STAG providing cohesive and unified technical and industry knowledge inputs to trade negotiations and discussions. However, some issues remain unresolved and will need ongoing research and input to resolve.

Project coverage

See attached list of articles and newsletters in Appendix 3. All articles and newsletters are available for download from www.seafoodtradeadvisory.com.

Project materials developed

See attached list. All project materials are available for download from www.seafoodtradeadvisory.com.

Appendices

Appendix 1: List of researchers and project staff

Jayne Gallagher (Principal Investigator)

Helen Johnston (Co-investigator)

Emily Mantilla (Co-investigator)

Dean Lisson (ACA)

Justin Phillips (SRL) until April 2018

Thomas Consentino (SRL) from April 2018

Simon Liu (China expert, translator)

Nathan Maxwell McGinn (STAG Chair)

Wayne Haggard (STAG Deputy Chair)

The following appendices have been provided as separate documents to this report:

- **Appendix 2: Seafood Trade and Market Access Agenda and Action Plan 2016-2018**
- **Appendix 3: List of publications**
- **Appendix 4: 2017 Progress Report**
- **Appendix 5: 2018 Progress Report**