

Valuing Victoria's professional fishing and aquaculture industries

Victoria has had a professional seafood industry for over 170 years. It's small, relative to other states', but highly diverse and valued by Victorians.



Victorian wild catch fishing and aquaculture industries make **significant economic contributions**

\$186m
household income generated

3,101
full-time jobs

\$323m
added value contributed in 2016/17



Victorians prefer **local seafood**

90%
say it's important to **produce seafood** in Victoria and **reduce reliance on imports***



Consuming seafood is part of the **travel experience**

81%
of Victorians say eating **local seafood** is an important part of the **holiday experience**

88%
of tourism operators say seafood industries add to **local character**



The seafood industry voluntarily **collaborates** in research and projects to **improve environmental health**

82%
of assessed Victorian fish stocks are classified as **'sustainable' or 'recovering'**



The seafood industry contributes to a **sense of identity** in regional communities

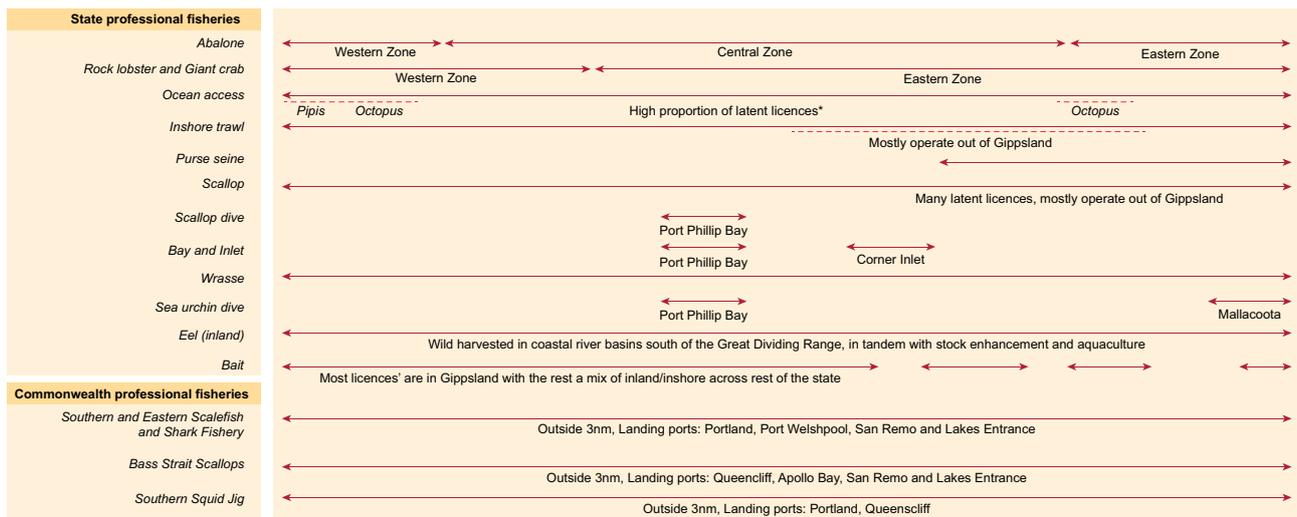
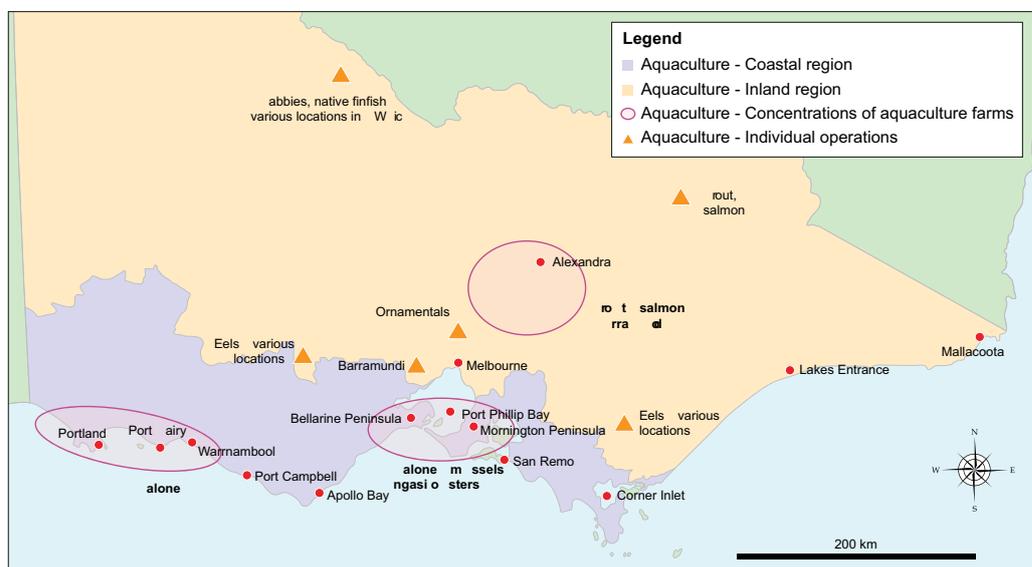
83%
of residents say fishing and aquaculture is important to **cultural heritage** and **community identity**

Valuing Victoria's professional fishing and aquaculture industries: measuring the economic and social contributions

Victoria has had a professional seafood industry for over 170 years. It's small, relative to other states', but highly diverse.

Wild-catch fisheries stretch along the coast from Portland to Mallacoota, and through inland waterways. In addition to the visible fishing ports, fishing operations are dispersed along the coast and inland. A diversity of species is caught by small-scale day boats and larger multi-day trip vessels. Most aquaculture production and value lies with a few large farms, dominated by abalone on the south-west coast, mussel mariculture in Port Phillip Bay and salmonid aquaculture concentrated in the Goulburn Valley.

While wild-catch fisheries production in some sectors has fallen over the past 20 years, aquaculture production has been growing. The post-harvest sector in Victoria is one of the most significant in Australia, with processors, marketers and wholesalers concentrated in Melbourne handling Victorian seafood along with interstate and international imports and exports.



*Pipis and Octopus are currently managed under Ocean Access licences but with separate management plans, main fishing grounds identified

Challenges and opportunities

Improving public understanding

The study revealed there's often poor understanding of the fishing and aquaculture industries among the public, both in metropolitan areas and in fishing communities themselves. There's substantial opportunity to improve public engagement, in turn helping to address misperceptions, reduce tension and conflict, build support for the industry and strengthen its future. Key areas of misperception or lack of knowledge include:

- The misperception that Victorian seafood production is unsustainable
- The extent of the industry's environmental credentials, which go beyond what's regulated
- The contribution to food supply – does the Victorian public want local seafood or only imports?

Responses could include industry-led engagement activities with communities to improve awareness.

Improved access to Victorian seafood

Regional communities see a clear need to develop new, sustainable opportunities to address unmet demand. Opportunities that could be further investigated include:

- Making seafood more accessible in regional towns by improving collaboration among operators and building new relationships between producers and local businesses.
- Expanding the use of local seafood in restaurants, by strengthening the hospitality sector's ability to work with local and seasonal seafood, building brands around Victorian seafood's unique selling points, and improving country of origin labelling in restaurants.
- Developing new, ecologically and financially sustainable fisheries for underutilised species.
- Increasing aquaculture production (given sustainable feed supplies and appropriate management so as not to damage wild-catch fisheries).

Strengthening relationships between the seafood and tourism industries

The study found the links between the seafood tourism industries are weak but communities, tourism operators and seafood producers all recognise the opportunity to improve connections. This can be done, most obviously, through food supply (as described above) and by capturing the international tourist market. Another key opportunity is to develop fishing and aquaculture tourism 'experiences' where tourists interact with the seafood industry. These could be in the form of collaborations among fishers, aquaculturists, tour operators, tourism boards and local governments.



Valuing Victoria's wild-catch fishing and aquaculture industries

Research by the University of Technology Sydney (UTS) for the Fisheries Research and Development Corporation has investigated how the Victorian fishing and aquaculture industries contribute to the wellbeing of regional communities, and to Victoria overall.

Until this study, there was little data on the economic and social contributions of professional fisheries and aquaculture in Victoria. The study, summarised below, finds the industries contribute to regional community wellbeing in five main ways:

Economic diversity and resilience – Fisheries and aquaculture make significant economic contributions

- \$323 million of added value (\$112 million from State professional fisheries, \$111 million from Commonwealth professional fisheries, \$100 million aquaculture)
- \$186 million of household income (\$55 million State professional fisheries, \$74 million Commonwealth professional fisheries, \$56 million aquaculture)
- 3,101 full-time equivalent jobs (909 State professional fisheries, 1,205 Commonwealth professional fisheries, 987 aquaculture).

Processing of Victorian-produced seafood contributed:

- \$37 million of added value – the wider economic contribution beyond just landed catch
- 645 full-time jobs

These industries support a range of business and job opportunities from on-the-boat or farm-based work through to businesses that service the industry, along with tourism and hospitality operations. They require diverse and often high-level skills, but also provide entry-level jobs. They generate jobs in places where there are few alternative industries, and they're active throughout the year, whereas some other economic activities, like tourism, are seasonal. Some 85% of community residents surveyed believe these industries help create economic diversity, and nearly 70% are 'very' or 'extremely' concerned about job losses if fisheries, in particular, are further restricted.

Food supply – The seafood industry provides access to an important and valued food source

- Professional fisheries and aquaculture produced 18,179 tonnes of seafood in Victoria in 2016/17.
- Melbourne's post-harvest operations handle over 55,000 tonnes of seafood a year.
- 90% of Victorians surveyed believe it's important to produce local seafood and reduce reliance on imports (over 70% of seafood consumed in Australia is imported).
- 62% of post-harvest businesses surveyed say the demand for local seafood is growing – 80% say it's greater than for imported seafood and 58% say it's greater than for interstate seafood.
- 96% of hospitality businesses surveyed say customers want to know the origin of their seafood.

Tourism and recreation – Seafood and aquaculture is part of the travel experience

- 81% of Victorians surveyed say eating local seafood is an important part of their holiday.
- International visitors, particularly from Asia, are the group most interested in eating local seafood.
- 54% of tourism businesses say regional tourism suffers from lack of access to local seafood.
- 69% of Victorians surveyed enjoy watching commercial fishers at work while on holiday.
- Professional and recreational fishers interact positively, with 82% of recreational fishers 'very' or 'extremely' interested in professional fishing and more likely than non-fishers seek local seafood.
- 58% of professional fishers surveyed had helped other users of the sea in distress in the past 5 years.

Environmental health – The industries help manage seafood stocks and the aquatic environment

- Data collected as part of regulatory oversight is used to manage fisheries sustainably.
- 82% of Victorian fish stocks assessed are classified as 'sustainable' or 'recovering'.
- Industry participants also voluntarily undertake practices such as testing water quality, monitoring and restoring habitats, minimising wildlife interactions and reducing their carbon footprint.
- They also voluntarily collaborate in research, collecting samples and sharing their ecological knowledge.

Social fabric – Fishing and aquaculture contributes to the sense of identity in regional communities

- 83% of residents surveyed agree fishing and aquaculture is important to heritage and identity.
- Many coastal towns were founded on fishing and much infrastructure was set up by fishing families.
- 79% of residents surveyed agree local fishing families are active community members.
- The fishing industry provides work, a support network and role models for vulnerable young men.
- Fishing, particularly for eels, has played a prominent role in the life and culture of Aboriginal communities across Victoria for thousands of years and continues to do so.

For more information, see: uts.ac/VictoriaFisheriesAquaculture

Victoria's fisheries and aquaculture: economic and social contributions FRDC Project No 2017-092

Source: Valuing Victoria's Wild-Catch and Aquaculture Industries, UTS

*Percentages are from survey responses

