



Australian Government
**Fisheries Research and
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WAFIC
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Industry Council inc.



SEAFOOD SERVICES
AUSTRALIA



**AUSTRALIAN
SEAFOOD
COOPERATIVE
RESEARCH CENTRE**

July 2008

FINAL REPORT

FRDC 2006 - 401

**Seafood industry export information package – direct extension to
overseas customers of Australian Seafood**

Refer 2008-724 SCRC: Seafood CRC: WAFIC export marketing bursaries 2008

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July 2008

ISBN 978-0-9751694-1-4

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Acknowledgements

Projects of this type rely heavily on people – someone has to have the vision and determination to do something different and the drive to put it into operation. To that end enormous thanks must be passed to Seafood Services Australia Ltd & Fisheries Research & Development Corporation because the concept came through the Seafood Industry Development Fund process and the main individuals involved were Dr Patrick Hone, Peter Dundas-Smith, Ted Loveday and Jayne Gallagher. Giving people the opening to make such a trip and learn first-hand, whilst being out of their comfort zones was seen as a risk but hopefully the successes achieved have shown that it was all worth it.

As the project moved into its third year the opportunity to get involved was not missed by other organisations. It still needs people to have some faith that the investment they are making is not going to be wasted so thanks to the Australian Seafood Cooperative Research Centre (Dr Len Stephens and his board) and WAFIC (Graeme Stewart and his board) to ensuring that their members were given the chance to be involved.

This whole project could not have happened without the bursary people. Every year it was a very difficult process to determine who would be successful from the array of talented people who had put their names forward. Those that were selected applied themselves magnificently to the tasks and hopefully they learnt much in a short time. Each year new friendships and networks were created and they along with the experiences and knowledge gained are long standing.

Finally a word of thanks for the overseas regulars who have shared their knowledge and experience with our groups – people that immediately spring to mind are Christopher Leftwich (Fishmongers Company), Libby Woodhatch (Seafood Scotland), Karen Galloway (Seafish Authority), Mike Dillon (Grimsby Institute), Litzie Makhotine (Paris) and Professor Jose Fernandez-Polanco (Universidad de Cantabria, Spain). Space does not permit the opportunity to list everyone who has shown us incredible hospitality over the years but we thank them all!

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market while Luke Freeman noted that due to the scale of individual companies with in Australia compared to Europe it would be best to promote “Australian Seafood” as a whole and information fed back to the industry through a marketing body.

Kane Williams shrewdly observed that; based solely on the countries visited during this tour (Spain, France, Belgium, England), the seafood market within Europe varies markedly and cannot be viewed as a single entity. He also noted that current EU tariffs on Australian seafood of 18-22% are excessive and pose a significant hindrance to importers. There is the possibility that these imposts could be halved in the coming year, but maintaining pressure on this process is in the industry’s best interests. Although the EU is reportedly not interested in establishing any new bilateral agreements currently, the existence of a mutually beneficial bilateral agreement with our close neighbours New Zealand could give us a starting point.

Steve McLeary focused on the market opportunities *“My general feel is that we are currently in the high end of the marketplace re: \$/product and need more generic marketing to ensure higher placement of market share. MSC(labelled Western Rocklobster) was fetching approx 20 pounds or the equivalent of \$50AUD (if you could find the product) It was my experience that the Rocklobster was not readily available, with many merchants advising they would buy more of the product if easily accessible, high quality, sustainable and in constant regular supply. The potential for growth in all seafood market places has the potential to be as big as efforts applied.”*

Finally, George Pitt made the observation about the Expo itself that:

Australia’s participation in this event is strategically a necessary investment for the following reasons:

- Exchange of ideas and innovation
- Market development
- Positioning and influence of Australia in the world seafood industry
- Country awareness – flows through to other products from Australia, enhances individual company development.
- Participation/engagement and involvement in regulatory bodies and NGO in the seafood industry
- Size, demographic, wealth and sophistication of the market place

For the first time we had a Government person on the bursary trip – Ian Nightingale, Director of Aquaculture in South Australia. Ian added a new dimension to the group dynamics and it worked well. The trip enabled Ian to get a good understanding of industry issues, was involved in some of the trade discussions, obtained some good understandings of the eco-labeling issues in Europe and was helpful, particularly for SA companies, in business discussions. If the bursary arrangement continues it would be good to create a government position on a regular basis as this undoubtedly breaks barriers between industry and government personnel and both get a better position on the issues there are for each other.

Mentor, Roy Palmer summarized that the ESE Bursary project was a 3 year exercise – and believed that it was very successful in achieving what it set out to do. The additional trips associated with the ‘tours’ have added value to the knowledge that the bursary people obtain and enabled them to get a greater idea of the full supply chain in one of Australian seafood’s major markets. The tours have also assisted in creating an incredible network which will be invaluable for the future. The value of the project lies in the lasting impression that it has made on the recipients. Indeed, so successful has it been that the programme is now a permanent feature of FRDC and Seafood CRC strategies.

Roy has kept in contact with all of the bursary people and tries to see them whenever he is in their area. The relationships that are built on the trips tend to continue beyond the bursary and that is something that makes the ESE Bursary very special. This bursary is further proof that an informal mentoring process can be more successful than a formally structured approach (see <http://www.aare.edu.au/04pap/ski04916.pdf>) and the opportunities that the bursaries have created have been well worthwhile for the bursary’s and their future in the industry.

Background

WAFIC was the only industry council with an active export marketing development programme. The Industry Council has a policy that encourages its members to expand their marketing, particularly in Europe, by attending the world’s premier seafood exposition, the European Seafood Expo, in Brussels each April/May.

WAFIC has extended this policy to embrace every State and Territory of Australia, and has used the venue to market the Australian industry (as opposed to Australian product). This particularly concentrates on Australian marketing advantages of sustainable supply, food safety standards and exemplary quality. For three years Wafic, with SSA, established and manned an information desk that provides accurate information on the whole Australian industry. The desk has been staffed with people who have an intimate knowledge of the industry. This has been a vital service, which customers for Australian seafood have inundated with requests. The Information desk has acted as a filter for client contacts allowing potential customers too be directed to those companies that can help them efficiently and effectively and with the minimum of fuss.

In 2004 WAFIC passed the organisation of ESE to Austrade on the proviso that Austrade would underwrite the event for the following three years. Austrade has agreed to continue to provide a central information desk but clearly the Austrade staff in Europe cannot have the depth of knowledge of the Australian seafood industry that is required to answer the bewildering range of questions that are asked of the staff at the information desk. Industry people who attend ESE are rostered onto the information desk and do an excellent job, but they necessarily have very specific knowledge and obviously concentrate their endeavours to their own business. In the

main they have limited knowledge of industries and other States' production outside of their own.

The European market is a rapidly expanding opportunity for valued Australian products and the continued expansion of the pavilion and numbers attending is proof of the need for the professional and independent approach to the information booth. The ESE is also recognised for being the only truly international event of its kind.

Need

There is a need to provide an unbiased, independent expert service to the industry as it attempts to penetrate international markets, particularly in Europe. This project would address aspects of the strategic challenges identified in the SSA/FRDC industry development plan and the FRDC People Development Challenge. Specifically, providing a service where the industry cannot provide an equal service to seafood exporters.

There is also a need to project the reputation of Australian fisheries for excellence in sustainability, truth in labelling, food safety and quality.

Objectives

1. To provide a professional information service for Australian exhibitors at the European Seafood Expo.
2. To launch the Australian Standard for Fish Names internationally.
3. To mentor an Australian Seafood industry person in order that they gain knowledge and understanding of the work involved at such Exhibitions.
4. To disseminate any information from the trip, involvement at the exposition, etc into ways which will help the Australian Seafood Industry.

Methods

The project will employ one of Australia's most experienced seafood marketers to provide services and specifically to mentor the successful bursary applicant.

To assist this, the project, with the FRDC and SSA, will produce a simple, accurate document that gives people a clear and unambiguous picture of the current status of the Australian seafood export products. This will be used to educate potential importers of the quality, variety, volume and value of Australian seafood products.

The Australian industry has been grappling with truth in labelling since before 1987. The industry has progressed this to a stage where it is forming the world's first fish names standard. As seafood is the world's most traded commodity and that the plethora of names

makes this trade fraught with difficulty, the fish names standard is a world leading development that marketers of Australian seafood can take full advantage of. The ESE presents the first and best opportunity to launch the Standard on a world stage with the absolute maximum of publicity. The Standard will be launched in conjunction with a Wafic/MSC cocktail, giving it the maximum advantage with non-government organisations such as the WWF and Greenpeace which are very influential with consumers. Fish substitution, as highlighted at the SSA Hosted 6th World Congress of Seafood Safety, Quality and Trade in Sydney, is a major problem in worldwide trade particularly of species which these organisations believe are vulnerable. This promotion would also assist sales of Fish posters and other SSA/FRDC publications.

Results/Discussion

This project started as a SSA SIDF project and was extended through to FRDC and covered 3 years. Additionally this was also picked up by Australian Seafood CRC and WAFIC and they sent people with FRDC in a joint arrangement in 2008.

Recent information about mentoring has shown that informal styles of mentoring are the most successful, but; of course, they rely much on the person doing the mentoring. The concept of having someone with knowledge imparting that to young people in the industry in a challenging environment is a good one and clearly one that FRDC need to consider for the future. The people that have been on the program have been able to develop their own ideas about where concepts they saw first-hand fit into their sector of the industry. Industry has nothing to lose and much to gain from this approach.

The ESE Bursary is also about taking people out of their comfort zones and getting them to see opportunities and ideas and the program has worked well in that regard. Probably having 6 bursaries is too many – maximum should be pegged at 3 or 4.

Benefits

1. An information package with salient information on the Australian Seafood industry for the stand.
2. Provision of unbiased, expert information to potential customers of Australian exporters
3. Compilation of a directory of client requests for exhibitors at the Expo on a daily basis
4. Publication (SSA website and bulletin) and Extension (industry magazines) of information on the demand for Australian seafood products at ESE.
5. Report for SSA (and SSA Network), FRDC, ASIC which would be presented by person receiving the bursary.
6. Preparation of information which could be utilised as a guide document to industry people interested in attending future ESE events. Subject to Austrade agreement this could be used as a promotional tool for the next year and promoted to SME operators to allow them to appreciate

what is involved

Further Development

Investments in Bursary projects like this will now be arranged through the FRDC People Development Program.

Planned Outcomes

- 1 The provision of a professional independent information service for Australian exhibitors at the European Seafood Expo.
2. The successful launch the Australian Standard for Fish Names internationally.
3. The introduction to such events of a person worthy of the Bursary assisting with their development in the industry.
4. Knowledge transfer and communication relating to learning from attending the event which maybe relevant to SSA, FRDC, ASIC and the proposed Seafood CRC.

Conclusion

The original Performance Indicators were:

1. Production of a succinct and comprehensive guide to Australian seafood products.
2. Providing expert independent information at the Australian pavilion at ESE.
3. Provision of a database of genuine enquiries for Australian seafood from ESE.
4. Successful launch of the Australian Standard for Fish Names at the world's premier seafood event.
5. Production of a report (including power point) on the trip.
6. Preparation of Guide for promotional purposes for future years (subject Austrade involvement)
7. Exit survey by all attendees at Australian pavilion at ESE.

Following achieved against those

- 1 Achieved – this was done each year by both/either FRDC/SSA in conjunction with the ESE Australian Pavilion team.
- 2 Achieved – and reported each year – see appendix regarding ESE Reports

- 3 Achieved and passed onto SEA for future
- 4 Achieved although not specifically at the ESE event. The ESE event certainly provided a platform for the Australian Fish Names Standard in so many ways.
- 5 Achieved – reports are attached and all bursaries have been and will be involved in passing on the knowledge that they have obtained
- 6 Achieved although without any help what so ever from Austrade
- 7 Achieved and referred to in ESE Reports in Appendix

The objectives, outcomes and performance indicators were all met.

The project was extended to cover 2008.

Much has been learned from the project and it is helped everyone in the process to appreciate how this type of involvement with industry people can assist the growth and capacity building that is required.

Genuine success....

References

Staff

Dr Patrick Hone (2008 Selection Panel)

Peter Horvat (Australian Pavilion Team)

Jo-Anne Ruscoe (2008 Application process)

Appendix 1

Bursary recipients ESE Reports 2006, 2007, 2008

Bursary Reports 2006 (A Hurlbatt & N Dorrington)

EUROPEAN SEAFOOD EXPOSITION (BRUSSELS, MAY 2006)

Report for Seafood Services Australia & FRDC

by Alice Hurlbatt, Bursary Recipient.

The European Seafood Exposition, held annually in Brussels, is an ideal opportunity for all members of the seafood industry, whether in the catching, processing, retail, management or other sectors; to develop an greater understanding of the extent of the global (and in particular, the European) seafood market, and the position of Australia within that marketplace.

In addition, the associated events, such as the inaugural meeting of Marine Stewardship Council Certified Fisheries, the technology exposition at Seafood Processing Europe (2006), a visit to the Billingsgate Market in London, as well as the numerous social occasions provide significant opportunities for members of the seafood industry to expand their network of contacts in their industry and related fields, while also creating numerous opportunities to expand their businesses while updating their business practices in line with world leaders in the global industry.

Issues for any industry member to consider prior to, during and after attendance at the ESE to maximise their participation relate mainly to planning, preparation and organisation. The importance of these factors is obvious however, it is possible to underestimate the costs and difficulties associated with achieving what would ordinarily be relatively simple tasks. The facilities at the venue in terms of administration, eg printing, copying, sufficient numbers of business cards and brochures; cooking, storage, refrigeration, power supply etc are somewhat limited relative to what one would normally have at hand. This restricts the ability of exhibitors to carry out those operations efficiently (particularly in relation to cost efficiency).

This also relates to after the event, in terms of transporting (or not) the excess products, brochures and display stands etc back to your normal place of business.

Accommodation arrangements prior to the event are particularly difficult, partially due to the time difference, and especially if organising additional events, meetings or conferences, thus internet bookings are useful but it is important to allow extra time between communications. However, the importance of booking accommodation early is paramount to reduce costs, and secure your desired location and hotel. The use, if possible of group bookings for travel and accommodation would also be beneficial, allowing attendees to coordinate and share travel costs and arrangements both internationally and in Brussels.

It would also be useful for industry members (regardless of their business sector) to have information on their availability, meeting schedules and key business provided to staff working at the stand prior to, and during the exposition, to allow more efficient, professional customer service by the staff, while also ensuring their time is not wasted by staff directing inappropriate business to them. Providing this information (where possible) prior to the event will allow staff with limited experience in that particular industry or sector to answer clients' questions more effectively and with confidence.

The provision of generic information to the staff at the stand on the type of products (eg processed, whole, value added, frozen etc and the quantities available), the nature of the product (eg tropical fish, good for restaurant trade etc), additional common names and any other information pertinent to the fishery products dealt with by the various companies represented at the stand prior to the Expo would be particularly useful to allow more efficient client query processing, especially for those staff with limited information about other sectors and products represented at the stand.

In relation to my own experience of the event, there were a number of points that became apparent to me during the Exposition, particularly in relation to how my industry and the greater industry entities fit into the global market place:

The Western Rocklobster Industry- it is obvious that a coordinated approach from the industry (including elements of both the catching and processing sectors) to marketing and promotion in a generic format is needed to provide a better international image and focus for the product. There was also significant interest in 'sustainable' product at the Exposition, with eco-labels abounding in the promotional material and displays of many stands. I believe having MSC certification for our industry is

a factor that, as well as being absolutely necessary just to remain with the market trends (let alone lead them), should be promoted at a whole of industry level. The attendance of WRL members at other international trade shows under a similar banner, as well as those attending for their own business would also be beneficial to the WRL industry.

The WA Fishing Industry- the incredible amount of work done by WAFIC staff and several board members prior to, during and after ESE is a credit to them, and the smooth running and positive public feedback from the event are evidence of this. The role of WAFIC in promotion of WA seafood is important and I believe the effectiveness of the WA campaign (as for the Western Rocklobster industry above), at ESE and other similar events, could be significantly increased with a targeted generic marketing and promotional strategy, including publications or brochures listing all WA's seafood resources, importers and exporters, as well as further promotion of the environmental and best practice attributes of the WA industries. While WAFIC is endorsed as an approved body Austrade, the intricacies and unique nature of a generic WA marketing promotion strategy I believe necessitate additional resources, both in terms of financial and human resources, to achieve the desired outcomes, which may be better utilised by a separate generic promotion entity within WAFIC or alongside WAFIC.

The Australian Seafood Industry- while comments from both the international clients and the Australian representatives pointed out the strong WA influence in the ESE stand, the presence of other States and industries could be optimised through further contribution on their part to individual State based seafood promotional entities, similar to that described above, with an overarching Australian generic seafood industry promotion entity. While the costs and management of such an entity are problematic, the obvious benefits in terms of a co-ordinated, uniquely focused strategy promoting the merits of Australian seafood, without overlap while streamlining costs would enable the Australian seafood industry to maintain its competitiveness in the dynamic global market. While the various sectors, States and industries remain fractured at such an event, it makes providing information to prospective buyers and business people more difficult, particularly as they often want a single source of all the Australian seafood suppliers and buyers (or all the buyers etc from a particular area), as well as information on the credentials of the various industries. This would also serve to provide a very professional image to the global seafood community in the current international move to sourcing sustainable, quality seafood products.

Personal Development- the incredible benefit provided to bursary recipients, or other industry members who would not normally have the opportunity to attend such an event; stems from the opportunity to expand one's knowledge from the limits of their sector or fishery to the 'bigger picture'. It highlights at once the significant achievements the Australian seafood industry has made in terms of best practice, and the small role and market-share that Australia occupies in the international seafood industry

relative to other countries and organisations. This realisation was both humbling and a source of pride, and I now have a much better understanding of the role of Australia, Western Australia and Western Rocklobster in the global seafood market.

The ESE was also an opportunity to grasp more readily the meaning and usefulness of professional networking, and to put that concept into practice on a larger scale, and more efficiently than I have previously been able to do. I have consequently made a significant number of contacts who are invaluable for both my own personal development, and for the industry and projects with which I work.

It has also given me a greater understanding of the post harvest supply chain (of not only my own, but other seafood industries), including the detailed and dynamic nature of sales, marketing and business development, although I am aware of how much more I still have to learn about this facet of the industry!

The ability to learn from the experiences others, particularly from my mentor, Mr Roy Palmer, is expedited in an environment such as the ESE, the importance of the role of the mentorship of an experienced industry representative cannot be understated either, and I am deeply grateful to Roy for his patience, ready assistance and advice and his encouragement prior to, and during the ESE. Thank you also to Jayne Gallagher, for her assistance and advice prior to, and during the ESE, and to Peter Horvat and Neil Dorrington for all their support in Brussels. The presence and input of these four people at the stand's reception desk provided newcomers, such as me, with the confidence and support to work happily and effectively at the stand, in what were at times very stressful conditions.

I am very grateful to all those people within my industry sectors, WAFIC and national entities including SSA and the FRDC for all their assistance and support for my attendance at the ESE and beyond, and appreciate this opportunity to attend the event and value the knowledge and experiences gained. I would also be more than happy to provide presentations or updates to the SSA network meetings or industry groups as required. Please contact me at the Western Rocklobster Council should you wish to discuss anything outlined above.

Report of a visit to the European Seafood Expo 9-11 May 2006 Brussels, Belgium

by Seafood Industry Development Fund bursary recipient Neil Dorrington.

When applying for the Bursary I had two (2) main questions that I believed needed to be answered:

1. Is the MSC really worth all the trouble and expense that the rock lobster industry has been through and how will MSC benefit industry long term in a monetary sense?
2. Are these type of Seafood shows just a place where the general public can go for a free meal which does not help us receive a better price or recognition of our products.?

My first impressions were tarnished by the fact I arrived in Brussels but my luggage did not! It arrived later that night (David Carter from Newfishing Australia had the same problem on the same flight).

Meeting up with Roy Palmer (Director: Seafood Services Australia (SSA)) we travelled on the underground to the Brussels Expo where the local contractors were piecing together the Australian stand. To see the sheer size and mass of people assembling all types of stands was amazing as was a very strong security presence.

It was pleasing at this stage to meet up with the Richard Steven and Peter Fraser from WAFIC resplendent in their matching WAFIC blue shirts, patiently awaiting the arrival of the live Rocklobsters and associated frozen and chilled product.

Marine Stewardship Council (MSC)

The next morning we attended the meeting of the stakeholders of MSC and the MSC bureaucracy. The meeting was organized by WAFIC for the whole of the MSC Stakeholders (all fisheries that are currently certified by the MSC around the world).

The delegates all expressed concerns with the fact that MSC had only partially completed its obligations to the stakeholders by lack of promotion of its own logo. This was highlighted by the fact that major English department store Marks and Spencer who are big time supporters of the MSC will not allow the logo on products sold by the company.

It is hard to pass MSC onto the consumer when the logos are not displayed on the saleable item.

Rupert Howse, the CEO of MSC informed the stakeholders that they have coming on stream another six (6) fishery certifiers and will be doubling their staff to take the promotion of the MSC logo to a higher profile. He then went on to say that they had new commitments from purchasers with growing demand for certified and labelled products to meet the demand of growing awareness of MSC.

A surprise is the fact that MSC will be opening an office in Japan within the next 12 months. (If this is the case it would be of a great bonus to the WA lobster fishers as that we already have status attached to our product)

It was encouraging that the management of the MSC welcomed the findings of the meeting and were already implementing some of the changes brought forward by the meeting.

The outcomes from this meeting will be passed on for discussion at the MSC Board meeting. I would strongly suggest that a representative of the stakeholders meeting present the outcomes to the MSC Board.

The meeting was primarily chaired by Guy Leyland (morning session) then Bernard Bowen chaired the afternoon session. Bernard still knows how to extract the best and worst from everybody while still been able to have complete control of a meeting while allowing the participants to have their say.

It was gratifying the appreciation that every body showed for WAFIC having the initiative and foresight to organize the meeting.

It reconfirmed my belief that while the MSC has a high conservation/political value this alone is not enough and MSC must take the meaning behinds the Certification directly to the consumers through promoting MSC more predominantly to benefit all its stakeholders. *Note: Since my return I have seen some TV commercials on GWN promoting MSC which was very surprising*

I raised a number of questions as follows:

If a company is allowed to do *Panulirus cygnus pueruli* grow out in WA through aquaculture:

- 1 Will the company be able to export their product under the existing MSC logo?
- 2 By removing the pueruli from the wild fishery will this effect the existing MSC certification?
- 3 If it does effect the current certification will the WA wild capture lobster fishers have to fund a full re-certification for what is essentially an activity that is beyond their control?
- 4 If we lost the MSC certification due to this activity what happens then?

MSC were unable to respond immediately and have said that they will get back to me in writing.

I can see the benefits from having the MSC label attached to our product **at this stage** and I believe that in the long term it will become increasingly important tool in the marketing of our products. It is a slow and demanding process.

This is coupled with the important benefit that the conservation movement has accepted the fact that we have taken the first moves towards being environmentally friendly and sustainable which has opened dialogue and broken down some barriers.

European Seafood Expo – Brussels, Belgium

The next morning on arrival at the Expo site the transition from the day before was amazing not to mention the huge quantities of bagged flake ice stacked everywhere.

The Australian stand was well laid out, not as high profile as some other stands, as we had an open style. This was coupled with the fact that some of the countries had huge amounts of money to spend on their displays (eg Scotland over Aus\$700,000!)

Together with several other people my role was to man the stand and assist with enquiries as people entered our area.

The basic way the stand worked was that when a person enquired for a particular Australian seafood product we would ask for 2 business cards and for what product was the person enquiring. For example an enquiry on lobster would be pressed as to any preference on species (Western or Southern). There were no enquires about tropical lobster. If the preference was Western Rocklobster we would take the person to a representative from one of the WA lobster exporting companies that were present at the stand at the time, introduce them, then taking the other card attach it to the day book and write a caption about what was the query.

Coffee was served at all times during the day with samples of product being prepared by a full time chef and passed around by our waitress Blanca a tireless great worker at all time. Her translator services were appreciated immensely by me and my colleagues.

One of my roles was to go to the freezers (chillers) and obtain the seafood for the day, take it to the chef, explain what species it was and the best way to prepare it for samples. My French was deplorable and my thanks go to Catherine Swainston (whose company, ANIMA produces and exports superb fish paintings produced by husband Roger) for all her help in translating. She was invaluable for her work and expertise in manning the stand during the huge number of hours she put in. It was a credit to her professionalism.

This routine enabled me to meet people from many other countries at the Expo and see a lot more of the 'behind the scenes' that makes this massive event take place. I met many of the other people on similar stands to that of the Aussies and they gave me the lasting impression of how important the correct product marketing and quality was to ensure repeat business and enable a higher price to be achieved. However there is more work required by Aussie marketers on the best direct routes to get our product there in first class condition.

The quality of the product from the chilled WA seafood was a credit to all involved and I am happy to report all arrived in tip top condition from so far away.

One problem that needs attention is that when a carton was opened its contents label stuck on the side was often ripped and in some cases stamped over or taped over leaving the contents unlabeled. A suggestion is that a sticker or information sheet on the inside of the box lid in future would enable the purchaser to easily identify its contents so as to know where to purchase more.

The quality of the samples on the Australian stand that were distributed throughout the Expo was first class.

The full time people manning the stall were;

Richard Stevens, Peter Fraser from WAFIC and overall co-ordinators;

Peter Horvat, FRDC,

Catherine Swainson,

Sarah Gazier, on the staff of the WA Government Agent General (London),

Alice Hurlbatt WAFIC,

Roy Palmer and Jayne Gallagher, Seafood Services Australia

The sheer number of people that stopped and enquired about Australian produce was never ending. It was so busy that the Aussies manning the stand had little time to leave for a break and Richard organized a snack out back of the stand to stop us from starving.

At the time of closing on the first day (10am - 4 pm) we were quite weary but perked up with a glass or two of Ferngrove quality WA wine.

The Australian stand hosted a 'Welcome Function Cocktail Party' which was a huge success with the variety and quality of the seafood was world class. The welcome speech needs a PA system next year along with a signage of the wine supplier when the seafood tastings come around and just one variety at a time (i.e. fish followed by scallops etc again with a larger signage on the plate with the origin of the product coupled with a large menu displayed on the overhead screen).

The people employed to do the serving looked great in their black Western Australian

'Sustainable Seafood' aprons and did a great job.

I found that by personally taking a plate of seafood tastings and wine around it allowed me to meet a lot of people that I would not have otherwise. I could explain to people where the seafood was caught and give them a description of the fishery while being able to move on without being rude.

Even the stand clean up afterwards was quickly done by all the stand staff.

The next morning at the Expo found us running short of certain business cards something that needs to be addressed next year.

The day went quickly with again a huge number of people making enquiries about Aussie fish. It appears that any red coloured fish (eg Red Emperor, Coral Trout) are a huge attraction in Europe.

At this stage I began to notice a lot of people asking about the South Australian Ferguson Southern Rock Lobster oil A product used to enhance cooking and improve flavour. This may be something that the Western Rocklobster people should start to learn about.

I was impressed with the Ferguson (SRL) display and the way that they were always available at the stand and tried to work with the stand workers. So was the way that the guys from Northern Territory fish manned their display and were always willing to help on the stand. A credit to them.

The following night the Australian stand played host for the people from the Seafood Choices Alliance (a reasonable green group similar to WWF's MSC with different goals and beliefs) these people were a completely different group not processors or catching sectors with different goals from the night before.

Again it was by helping deliver the food and drink around the room that enabled me to meet many, varied people. If it was not for the function I would not have been exposed to these people as their stand would not be a priority visit, it enabled them to have good interaction with us and allowed us to develop a mutual understanding of each others concerns and goals. (Good move in hosting this shindig)

It was not quite as busy the next morning so we decided to go for a look at the other pavilions and their displays to see how they all worked. Scotland had a large stand with 3 chefs continually churning out tastings the smoked Haddock soup was stunning the volume they prepared was huge. How could I forget to mention the outfits on the Ladies from Estonia quite ...emm breathtaking .No matter how small the fishery is of value all countries large and small seemed to have a separate stand. (most I never knew existed)

Most people commented that we had the most colorful / informative brochures of the displays.

Conclusions

In closing I would like to suggest a few changes to improve the Australian seafood stand.

- 1 A roster drawn up involving all Aussie companies or fisheries who are in attendance so that at any one time there is a representative available to talk to people making specific enquires about a product.

- 2 A notice board/laptop advising who is in attendance at the stand and with the return time of the rostered person as this would make the job of the stand people much easier than chasing around not knowing who is where. A person making an enquiry can also make arrangements to return at the same nominated time.
- 3 A generic promotion brochure with the list of processors and contact names and numbers, including the various ways that the product is sold. Then the companies that are supporting the stand could have their business card attached to the brochure.
- 4 A mobile phone in the stand with all the people in attendance numbers pre dialled so that everyone is in touch much more easily.
- 5 The Western Rocklobster display was stuck all the way out the end of the stand and was without proper signage. There was no MSC signage on the product or any logo that was visually recognizable. (Ice fish included)
- 6 A need for a list of companies that import seafood into Australia (types and location) to pass on to people who make enquires.
- 7 A greater visual display of the various types of seafood on displays. It was the colorful display of the WA (Gascoyne) and NT fish that helped us not have a sterile stand. The fact that tropical fish was physically on display gave of a purpose to what the stand was trying to promote.
- 8 On the closing afternoon a debrief session over dinner or a drink would allow positive outcomes to be discussed and advances in communication while all participants are in the one location.
9. Use an Australian Chef that could prepare and cook food on a barbeque with various set menus and tiers of tastings would help promotes a different way of enjoying quality Australian produce.
- 10 Forget about having any involvement with Austrade especially expecting them to assist on the stand (my own earlier encounters with Austrade were reconfirmed). It was a waste of time and money they never once offered to help on the stand to relieve some of the workers or try to participate in the day to day running.
- 11 Closer liaison between WAFIC and SSA on the lead up to the Expo. It appeared a bit one-sided on the West Aussie side (unsure of whether the stand was West or Australian Stand while understanding that West Aussies put more emphasis on this expo)

- 12 Hangeronerers - the dictionary does not list this word but I define it '*freeloaders - those who have not contributed to the cost of the stand but expect rock up and treat the stand as if they have*'. How to deal with these freeloaders is something that needs to be discussed before next year.
- 13 By hosting various functions at the stand it allows people to develop long term relationships and open up communication between various non conforming parties these functions allow the mixing of conservationists and catching /processing sectors.
- 14 AUSSIE STAND MUST BE THERE AGAIN NEXT YEAR! Yes I believe that we have to continue our involvement with this expo as only time will help us develop long term relationships with European customers who need to be informed about our various quality and types of seafood.

Special Thanks!

How can one give appreciation to the hard work done by all the people who manned the booth for their professionalism and work ethic over many long hours? They are a credit to themselves but more importantly a credit to our industry!

My special thanks to my teachers.

Peter Fraser, Richard Stevens, Roy Palmer, Jayne Gallagher, Peter Horvat, Sarah Gazier, Alice Hurlbatt and Catherine Swainston, for their great teamsmanship and professionalism.

They were real people who did a great job. (Roy makes man brekkie)

Thank you for this opportunity to contribute to my industry. It has broadened my outlook significantly and confirmed some beliefs that I have previously held about marketing of our quality Australian seafood.

2007 European Seafood Exposition by- Daryn Logan

The 2007 ESE Bursary was extremely well organised. The trip voluntarily started in Edinburgh Scotland on the 15th April 2007 and finished in Paris on Friday 27th April 2007. Having the opportunity to visit the ESE was just part of the trip. The opportunity to maximise my learning experience was achieved with the extra tours and time put in at the beginning and end of the trip.

I arrived in Edinburgh on the 14th April 2007 and had 2 full days with Roy Palmer before the official tour started. I found this time invaluable as we inevitably discussed the current status of Australian seafood industry and suggested changes or improvements that may benefit the industry. Roy had put a lot of thought to my trip with Seafood Scotland and had arranged for me to visit Peterhead co-operative. I found the Scottish industry grappling with similar changes facing the Australian industry (sustainability, regulation or over regulation, declining catches, global warming, and profitability). The tour was at rocket pace, but in the steady hand of Seafood Scotland's technical advisor (Jess Sparks), the quality was very high. I visited the local vessel "Amity" on which BBC filmed a documentary last year which is said to have done enormous promotional benefit for the Scottish fishing industry, combining humour, danger and hard work. Thus giving the general consumer a better understanding of the difficulties faced by the fishing fleet. The final part of the tour was a local processor who processed Langoustines for the Italian markets. All facets of this tour benefited my understanding of the changing demands on industry.

We moved to London on 19th April and toured Billingsgate fish markets and several processors and restaurants and Austrade on 20th April. I found the Billingsgate fish market very large but generally handling average quality product. The Supermarkets have most probably accelerated their decline through direct sourcing. The major trend was towards portion packing and the labelling of chilled product (Frozen thawed for your convenience). There is a major promotion that product frozen quick and thawed quick is as good as fresh. Generally the consumer is biting the hook and profitability for all involved has improved. On top of this it was not unusual to note labels claiming no preservatives and organic and being branded by country.

The European Seafood Exposition started on the 24th April and we had the full day of the 23rd April to talk with the organisers (John, Sam and Peter) and learn the general requirements. I thought this time could have been better utilized. Major parts of our time on this day I felt were lost. Possibly this was new to them and they did not know how to utilize Scott and my time. Still we got to know the layout of the Exhibition and this would be invaluable for the latter busy days. I Tried to get them to organise the tickets for product at the store in a better way as the way they were doing it was very confusing and possibly difficult to control.

I feel there is not enough I can say about the ESE. It is so big and generally most of the seafood world is participating. There really would be no better way of keeping an eye on trends, be it packaging, equipment, competition, prices or sales. The Australian stand presented very well, and looks clean and simple. The position in front of the ESE cafe and toilets is invaluable for passing business. I believe that some private discussion booths may have been beneficial to paying members. However the stand did present a clean and friendly image and a united Australian industry.

Prawns or shrimps certainly seemed to be the flavour in ESE and most important the packaging and branding. There are still niche markets available for more expensive products but branding and image are critical into which plays sustainability, organic, preservative free etc. Incidentally sustainability was definitely on the agenda with Green peace confronting all participants and visitors at the front gates on all 3 days.

The 3 days on the stand were invaluable and I found the stand abundant with knowledge. I was able to browse the ESE several times and found this experience priceless. Visiting Food Pro's in Australia is just not the same; although some equipment will be the same you will not see hands on the specialised seafood processing equipment. This enabled me to quickly assess future investment opportunities which seem distant to those with their feet planted deeply in Australian soil. In order of building a better seafood industry it is critical that we network and help promote our products, the ESE enabled me to achieve this goal.

The final part of the trip was again voluntary and involved a visit to the Paris fish market and supermarkets. This to me was the driver for the trip, Parisians really take pride in their food and this was exemplified in their markets.

I would like to thank WAFIC, FRDC, and SSA for this opportunity. I would not have had the opportunity without the Bursary. The bursary to me has hopefully set the wheel rolling for a better seafood industry, so I can now plan a little more logically for the future. I would also like to thank Roy Palmer for his efforts in organising the trip and the knowledge he was able to impart to me. I found all excursions well organised learning experiences with lots of opportunity to network.

Kind Regards

Daryn Logan

Overview of the 2007 European Seafood Exposition Bursary – Scott Walter

The 2007 Bursary involved visits to Edinburgh, London, Brussels and Paris over a two week period from the Monday the 16th April until Friday the 27th April.

The focus of the visits to each of these cities was to learn about the major drivers in their local seafood industries and gain a perspective of the global seafood industry. We met with industry

peak bodies, service providers, wholesale markets, retailers and restaurants, with the main focus being the European Seafood Exposition (ESE) at which many countries from around the world showcased their products.

ESE: The Australian Seafood Stand.

The Australian seafood stand at the ESE was very impressive. It is extremely hard to get noticed at a show with thousands of exhibitors; however I believe that the distinctive design of the Australian stand did this as effectively as other stands with budgets well in excess of ours. The stand generated the impression of a united Australian seafood brand, and with continued improvements will be an important component of building on top of our existing presence in the global seafood market.

The only thing that I believe that limited my ability to add value to the stand was inadequate pre-planning with the businesses represented on the stand. I found it a little difficult readily identifying which of the businesses represented were selling which products when exposed to the full pressure of regular enquiries. I believe I would have coped better with this, had briefings been completed for the stands staff prior to the event, that included the product list of each of the clients and their major priorities for participating in the stand to allow time to review and retain the information.

There are other areas of the stand that could potentially be improved that have been raised by the business partners, such as the need for private meeting rooms, greater ability for individual company brand signage, easier access to company brochures and business cards (as they were slightly hidden behind the information desk) and suggested changes in the placement of the sections of the stand. I believe all of these would enhance the stand, however given the individuality of the Australian stand, must keep in theme with the existing design.

I also believe that greater company involvement on the stand could be generated by distribution of an 'outcomes' document from the show, including imagery of what occurred. This could be in the form of some very early promotional material clearly outlining what ESE is, how many people/countries/companies are involved, the benefits that participants can receive (maybe some quotes from the Fergusons, Raptis etc on the benefits). Many companies would be planning the 07/08 marketing plans and budgets now, and promotional materials distributed now might be more effective in capturing their attention rather than leaving the invitation process until post Christmas.

The bursary experience:

The major highlight for me was the ability to network with many other global seafood industry members, share insights into the challenges we face and discuss with them the actions they are taking to remain competitive.

The major take home message from this experience was that the global seafood is both an extremely large and dynamic industry, in which participants must remain innovative in order to get noticed.

Marketing has become a large focus for the Australian seafood industry in recent times, and we are certainly not alone. It seems to be the major driver throughout the entire global seafood industry as consumers become increasingly conscious and demanding of the products they purchase, and producers compete fiercely to differentiate their products. This was highlighted by the use of catch phrases such as FAIR TRADE, FOOD MILES, SUSTAINABILITY and ORGANIC, which were splashed over marketing apparel as building blocks to the many seafood brands.

Whilst the majority of Australian seafood producers can proudly stand behind their efforts to develop sustainable industries, there is definitely more scope for us to utilise independently endorsed standards to prove this, and be more proactive in our sharing of this with consumers. In addition to sustainability, we will have to move proactively to meet the other growing demands. This is a must in order to both differentiate and receive a premium in the global market place. This will involve new and innovative measures and require significant investment. The global seafood industry is moving rapidly, and anyone that stands still will be left behind.

The bursary offered me an opportunity to gain a much wider perspective of the global seafood industry, and where Australian seafood sectors fit into it. I believe that many new opportunities will arise as a result, and I hope that these will contribute to improvements in the Australian seafood sector.

I would like to thank Roy Palmer for mentoring me through this experience. I enjoyed the time spent with Roy, and in particular learnt a lot from watching the way Roy networks with people. It was evident that Roy is well known throughout the seafood industry in Europe as a result of this networking, and it highlighted the opportunities that can arise as a result of building relationships. It was also great to have Roy there, as this was my first major trip overseas, and Roy was fantastic at making it a smooth experience.

I would like to thank WAFIC, FRDC and SSA for this opportunity. It was an amazing experience and one that made me feel proud to be involved in our industry. I hope similar opportunities are offered to other people in the industry in similar positions to me, as it was rewarding and inspiring. I believe that such experiences will significantly add value to our industry.

Kind Regards,

Scott Walter

Kris Carlberg – 2008 ESE Bursary recipient report

The bursary provided an opportunity to gain a better perspective of the Global seafood industry and an insight into how the Australian industry fits into the global marketplace for seafood.

The tours were informative and varied and all went smoothly. Through Roy Palmers personal contacts they were greatly enhanced.

A short pre-expo briefing would have been beneficial as it would have allowed the bursaries to direct enquiries more effectively and efficiently and thus provide a better service when manning the information booth.

The briefing should include details of which Australian companies will be at the stand and what products they are associated with and basic protocol for fielding enquiries.

Overall the bursary provides a fantastic experience no matter what sector of the seafood industry you are from as 'there is something in it for everyone'.

With regards to the product I am associated with, i.e. Western Rock Lobsters; Europe is not a major market for spiny rock lobsters at present. They prefer the familiar clawed Homarus species (Local and Canadian). I saw some Cuban lobsters in Spain and Chilean lobsters in France and the UK. These were the only spiny lobsters I saw in the markets during the tour. This may be because high end products such as ours go directly to wholesalers then onto hotels/restaurants.

The European market is becoming a more attractive and viable option as a result of the Australian dollar appreciating markedly against the currency of the countries who house our traditional markets, i.e. the US and Japan, While not appreciating against the Euro.

Western Australia Rock Lobster exporters need to develop products that are suited to the European market and establish a point of difference for their products to get a foothold in this market.

My area to consider and report on was fishing/aquaculture practices.

Mussel farming is a major industry especially in Spain and rafts are utilised instead of long lines. This is an intensive culture method with high levels of production from each raft. Depuration of shellfish is a requirement enforced by the EU and an industry revolves around this process.

Aquaculture of finfish is far more advanced in Europe with species such as sea bass, sea bream and turbot produced in large quantities. Not forgetting the vast volumes of Atlantic salmon from farms in Norway and Scotland that have been produced for many years and dominate the market.

Other species such as the iconic Atlantic cod and even barramundi are in early stages of commercial production. Aquaculture is a growth industry that is only going to get bigger as it tries to meet the shortfall caused by the reduction in wild catch. Of note was the vast numbers of Asian stands at the Expo purveying pangasius (basa). This species is now produced in vast quantities and is becoming more established in the European market as a white fillet alternative especially for value adding processors.

The Spanish fishing fleet is renowned (and feared) around the world but has been dramatically reduced by quota reductions around the globe. They are essentially in damage control and are trying to source fish from all over the globe to meet the high seafood consumption (45kg/year) of the Spanish population.

The Australian Fishing industry is as advanced (maybe more so in some cases) as any I observed during the tour in terms of boats and fishing practices (taking into account the different species that are targeted with different types of fishing gear).

Conversations with members of different fishing industries revealed they face similar issues as the Australian fishing industry i.e. Labour shortages and rising fuel costs.

Europe is a very competitive market with a large range of sophisticated value added products available in the retail sector.

These products are produced to meet the needs of the 'time poor' consumer who has no time for meal preparation.

There is a general lack of awareness of what Australian seafood products are available.

I believe the ESE is an essential part of promoting and establishing Australian seafood products in the European market. It has the largest concentration of international buyers and sellers of any expo in the world and enables participants to find out what is happening in the international marketplace.

Sustainability is the 'flavour of the month' and the major European retailers have embraced this concept and are sourcing from sustainable fisheries.

So the sustainability aspect is an important marketing tool.

For products to get noticed in the international seafood market they must be innovative and meet the changing demands of consumers.

Hi Roy,

Hope this finds you well. Sorry about the tigers on the weekend, a bit stiff I thought. Could be worse you could be a dockers supporter. I had better ring Steve and make sure he hasn't strung himself up from the yardarm! Anyway have attached the report – if it is too brief let us know and I can expand. Thanks again for all your hard work that goes into the tours I'm sure it was greatly appreciated by us all.

If you're ever up this neck of woods you know who to call for a sustainable lobster Sanger.

Cheers Kris

Luke Freeman

Looking at the products you have from their own business and answer these questions as detailed as you can:

Petuna Products Available for Export are: HOG Ocean Trout, HOG Atlantic Salmon, HOG or Frozen Filleted Wild caught Species, Frozen or Chilled Smoked Aquaculture Products, & Frozen or Chilled Value Added Aquaculture Products.

Is your product positioned to go into Europe? Give details -

The above products are fully fit for Europe but would require significant marketing as they are not known and would need to be introduced.

What is or will be your competition?

The Main competition for Petuna Aquaculture products is the imported Norwegian & Scottish Farmed Fresh Salmon Products which is in the markets in a variety forms at a much cheaper price and also the commodity of smoked products.

Petuna/Australian Wild Caught products would need to compete against the large quantity of all the Locally caught products from Spain and Iceland that are very well know and popular amongst the consumers.

Who are your competitors and what are they doing in this area?

Our main competitors are the Norwegian & Scottish farmed Salmon products which are plentiful in the market. They produce a number of different Salmon product types in various value added forms. Such as Cold Smoked, Gravlaks, Hot Smoked, Portions, Flavours, Mince roulades wrapped in pastry for roasting etc.

What would you do differently to approach this market?

Our products would need to be focused on the High end Food Service/Restaurant Trade as the Aquaculture species are of much higher quality than the current imported Aquaculture products of this species type. But also information from Jose was that only 15% of all Seafood is consumed in Spain Restaurants and then 75% is consumed at home.

What would be your strategy?

Target promotions with highly regarded, well known Chefs or Foodservice magazines/newspapers/Associations to promote &/or act as an ambassador for Australian products to create an interest from the targeted consumers.

Will you be aiming at getting close to the market or operating through a broker and why would you make this decision?

Product distribution preferably would be done through a broker/agent based in the Europe and speak & currently do business with all the different language types as the language barrier is quite a significant issue. This would also help to keep costs to a minimum to enable the product to be competitive with current products on the market.

How will you go about this, and how will you evaluate your program?

We will keep close contact with some of the other Australian Seafood distributors (Southern Aqua, Litzie etc.) and if appropriate, gradually introduce Ocean Trout to begin with. Utilizing a crawl walk & run strategy and participate in various promotional activity to spread the product knowledge and hold the needed pricing structure.

Seafood is a Global Business so would you consider importing anything that you saw and why?

Not for Petuna, Australian Seafood is of much higher quality and also processing in Spain is of less standard which is an important issue for Australian consumers.

(LF) Marketing –

What is going on in Europe?

Spain's culture is already very seafood focused therefore does not have large scale Seafood Marketing projects currently operating. There is a trend in the northern parts of Europe with processor/restaurants looking for sustainable seafood which has not been grasped by the consumers yet but will be a major issue. I/we did not view any major promotional campaigns towards specific products.

Who will we contact to find out what is happening?

In Spain, Madrid Fish Market Association would be excellent starting point to discover the trends, interests and demands for Seafood. The Grimsby institute is a good source for processing and market information in the U.K.

Do we rely on one source or more? What is the cost of getting such advice?

As each country has quite a different culture and thoughts towards seafood's it would be best to be involved with a key organization/association within each region/country.

Is it better to work independently or could we act as a group?

Due to the scale of individual companies with in Australia compared to Europe it would be best to promote “Australian Seafood” as a whole and information fed back to the industry through a marketing body.

Is all promotion activity’s good or should we be focusing on specific targets?

Promotions towards the general consumers/public that already has so much variety and quality would not be as beneficial and would be best to focus on the high end foodservice clientele to create a premium product branding and return a premium price.

What promotional activities did you see taking place?

Nil throughout our toured areas except ESE. This was a large scale promotion where all major producers of the Seafood industry are displaying new products and conducting new and current business.

What are your recommendations re opportunities based on this information?

Australian Seafood to continue to be part of ESE and promote our high quality sustainable Seafood Industry.

What issues are there for our Trade and Market Access people to investigate?

Issues involving sustainability, this will become more important issues within the coming years and consumers will also become more focused on receiving Seafood from sustainable fisheries.

What are the Drivers and Barriers for marketing Australian products in EU?

The drivers are our clean green high quality product range which would interest the high end market within Europe. Barriers are that consumers & buyers are very price orientated and the abundance of local and cheaper imported products will be hard to compete against.

(Everyone) Europe - What is different about the retail business?

Retail businesses that were viewed in Spain was based in a wealthy area of Madrid and was focused for the high quality general public, All products were displayed similar to high quality Delicatessens in Australia with Seafood products displayed similar to Fish Markets in Whole gutted Fish Forms and then filleted or portioned to the customer’s order.

Retail Supermarkets in Paris were of a much larger scale than Australia. Products are displayed in both a Fresh open Delicatessen on ice style and also refrigerated chest displays which contain packaged & value added products with a large variety.

What is different about the wholesale business?

The Wholesale operation which we viewed in London was a simple process. A lot of manual work still been done like filleting by hand, pin boning, scaling etc (the only machine was an old Portion Cutter) and customers had no cut off times or minimum order quantities for their orders. Basically the wholesaler was there to provide a service to the restaurant and did this at no matter what cost.

What is different about the markets?

Markets in Spain are of a high quality fresh local fish but practices; SOP's and hygiene were of a poor standard compared to Australia. Fish was stored in bins directly on the floors, floors had poor drainage, there was no protection from Birds while the fish was displayed and personnel hygiene and general GMP did not exist.

The Market viewed in Paris (Rungis Market) was of a much higher standard to previous markets. The products were well packaged, each product was laid out for display and personnel was Clean and tidy and also there was a dress code (Coats & Hats) It showed much better signs of the EU regulations being enforced. We also viewed the Fruit & Veg Section and the Meat section which was also of a very high standard demonstrating excellent product display and cleanliness. In general Markets are of a similar set up to Australian Markets.

What is different about the restaurant and food interface with the consumer?

In some regions the message from the producer does not get to the consumer. The consumer is often misled as to the Origin/Source or even species of certain products.

What new ideas are you coming home with?

I have various value adding ideas, packaging and smoked product recipes which could be beneficial with my area.

What are your recommendations based on this information?

I recommend that it is of great benefit for any person in the industry to attend not only ESE but some of the main Seafood regions within Europe to gain valuable knowledge and ideas on the trends and consumer needs if planning to enter this market and/or also to be able to utilize these ideas back in Australia.

What trade barriers are there for Australian seafood organisations to deal with when dealing with Europe?

The non English speaking Countries.

Is ESE just about Europe or is it bigger than that?

ESE is a World Wide meeting place for Global Seafood and Business from around

the globe and is not just in focused Europe.

Should the ESE be a targeted area for Australian Seafood and give reasons?

ESE is a worthwhile exercise for the Australian Seafood industry as it is an opportunity to show the high quality product available, meet potential buyers and learn different trends and what competitors are doing from across the globe. This helps to be competitive and have “the edge” other company or countries of a similar nature.

Hi Roy,

Hope you are well and settled back in ok. I would firstly like to congratulate you on the success of the trip, a life changing learning experience and organised extremely well and full credit to you - well done. I have attached my report. Please let me know if you need anything further. I am still yet to complete the "Post Harvest" report with Ian & George, but will in the next week or so. Also I will have all my photos put onto a disc and posted as requested.

Thanks once again.

Cheers

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European Seafood Industry Bursary Tour – April 2008

Kane Williams – Western Zone abalone fisherman, South Australia

Australian Abalone into Europe? – observations, prospects, competition

The French Ormer (*Haliotis tuberculata*) is the only abalone species that was encountered during the tour. Relative to Australian abalone, the Ormeaux observed were small (90-110 mm), shallow shelled and dark-lipped. Wild product was present on the market floor at Rungis in very small quantities (1 vendor, 15-20 kgs whole weight approx). Additionally, two French stands at the European Seafood Expo (ESE) were offering Ormeaux, one wild product the other farmed. The Rungis vendor was interested in sourcing Australian product, commenting that demand exceeded supply among his clients. Prices mentioned by the Rungis vendor of 30-40 euro/kg (whole weight, wild product) are amenable to Australian producers.

The wild Ormer fishery has collapsed previously and seems to now be only harvesting very small volumes (according to the vendor at Rungis, each fisherman is permitted to take 1200 pieces annually, but this will need to be verified along with license numbers). Given the tiny commercial volumes of Ormeaux it could potentially be seen more as assistance in maintaining a market presence than competition for Australian product. However several market issues would need to be investigated prior to exporting our abalone, including French patriotism for a native product, palate preference and market size.

Two immediate differences between the Australian and French abalone products are: (i) product size and (ii) production volume. As in Australia, farmed French abalone is sold at smaller sizes than their wild counterparts (32-60 mm), which presents a significant difference to Australian wild abalone. Our wild Blacklip abalone (*Haliotis rubra*, the species most visibly similar to the Ormer) are deeper shelled and harvested at much larger sizes (minimum of 130 mm), resulting in significantly larger meats than the Ormer. The impact that this major product difference has on the market would need to be assessed. Australian farmed abalone is generally harvested at a size similar to that of the wild Ormeaux, and indeed can be harvested at any size. However aquaculture production is focused on the Greenlip abalone, a species that is visually different to the Ormer, which again may affect marketability.

Our wild fisheries production for Blacklip abalone in South Australia alone is in the vicinity of 300 tonnes whole weight. We therefore have the potential to supply much more than the French market is accustomed to. It seems unlikely that there would be a major demand for abalone in France given the small-scale of local production, but this along with the other issues identified previously will require further investigation prior to exporting abalone.

General observations of the European seafood market

Based solely on the countries visited during this tour (Spain, France, Belgium, England), the seafood market within Europe varies markedly and cannot be viewed as a single entity. In Spain the market is traditional and focused mainly on domestic consumption. Low value, high volume species are the norm and 85% of seafood is consumed at home. Product quality does not seem to be as highly prized as freshness; and fishery sustainability is lower again. Fisheries are recognised as being in decline, however very little is being done to address the problem besides importing product and focusing more on offshore, deep water species to satisfy demand. There appears to be a general acceptance that wild fisheries will all but disappear in the near future (forecast an 80% decline in wild fisheries in 10 years) and still there is little emphasis on the environment and sustainability.

In France, however, consumers are more aware of the environmental issues surrounding seafood, which ensures that retailers take notice. Retailers such as Metro and Picard assess producers prior to sourcing seafood and even go so far as having blanket bans on selling certain products such as Tilapia, Pangassius and Nile perch. While neither of the companies mentioned above subscribe to Marine Stewardship Council (MSC) accreditation, they both recognise the need for sustainability approval and are considering their options. French

consumers also expect quality produce, as evidenced by the Rungis market with its hygiene requirements and high value species.

England is a large seafood market that also relies heavily on imports to meet demand. The domestic fishing fleet has declined substantially and major imports include trawl species from Iceland, farmed Atlantic salmon from Scotland and Ireland and farmed sea bass and sea bream from the Mediterranean. Consumer demand for seafood continues to increase and sustainability is a key issue for much of the market but again the MSC is not popular among seafood professionals who view it more as a marketing ploy than a true indication of sustainability.

Australian seafood and the European Union (EU)

Last year, Euro\$ 16 billion of seafood was imported into the EU and only Euro\$ 3 billion was exported, which combined with a strong currency make it an appealing prospect for seafood exporters. However, the total value of imported Australian product was only A\$65 million. This figure is likely to have fallen significantly in this current year due to two EU instigated trade issues concerning Australian prawns and abalone, which contributed A\$8 million and A\$2.2 million respectively in 2006/07.

Australian prawn exports have encountered problems meeting the EU's cadmium limits and Australian abalone are now required to come from classified waters and undergo biotoxin testing equivalent to bivalve molluscs. Both of these situations have now played out over an extended period (prawns - since July 2007, abalone – since March/April 2007) with no resolution in sight. The matters are mainly being handled by AQIS from within Australia with assistance from the agriculture counselor at the Australian Embassy in Brussels. In the author's opinion, given the potential of the EU as a destination for Australian seafood and the current difficulties being encountered, there is a need for more direct representation of the Australian seafood industry to the EU.

In addition to those already mentioned, there are other important matters that would benefit from an improved representative arrangement with the EU, foremost among them being tariffs on Australian seafood imports and the potential for a bilateral agreement. Current EU tariffs on Australian seafood of 18-22% are excessive and pose a significant hindrance to importers. There is the possibility that these imposts could be halved in the coming year, but maintaining pressure on this process is in the industry's best interests. Although the EU is reportedly not interested in establishing any new bilateral agreements currently, the existence of a mutually beneficial bilateral agreement with our close neighbours New Zealand could give us a starting point. Under this agreement, New Zealand continues to export abalone to the EU without any of the hassles currently facing the Australian industry. Ultimately, the EU will need Australia's seafood given the generally poor state of their fisheries and the sustainable nature of our own, which should provide some impetus to negotiate a deal.

Historically, European fisheries have always been difficult to manage due to the number of countries that access these resources. The formation of the EU seems to have exacerbated the

problem by allowing all member states to vote on fisheries policy, regardless of whether they have an active or historical interest in the fishery, or any fishery for that matter. This situation has created the opportunity for lobbying and bargaining between countries to secure votes, which results in decisions being made for reasons other than the good of the fishery. The Common Fisheries Policy (CFP) is the EU legislation that governs their fisheries and general opinion of it was consistently bad throughout the tour. Most negativity seemed to stem from the voting issue mentioned previously. However, quota arrangements that lead to discarding catch and inconsistency of legal sizes between countries also caused concern.

Acknowledgements

I would sincerely like to thank Mr Roy Palmer for organising the 2008 tour and the Fisheries Research and Development Corporation (FRDC) for generously assisting me to partake. The experience was invaluable for me in terms of exposure to new ideas and future situations that may apply to our Australian industries, useful contacts both within the tour group and throughout the tour and for providing perspective of our fisheries relative to much older, larger and generally declining European examples. The FRDC bursary to the European Seafood Expo is an excellent opportunity for members of the Australian seafood community and one which I hope continues into the future.

BURSARY TRIP SPONSORED BY FRDC AND AUSTRALIAN GOVERNMENT

15.04.08 – 02.05.08 Europe – Steve McLeary

MSC- products are starting to be well know throughout Belgium, Germany England also many other countries in the E.U. and are starting to see price increases as the Canadian cod fishery has of up to 6.5% for the first time. But not all fisheries will see this as the West Coast rock lobster industry has not seen any price advantage since being MSC certified 5 years ago but may in the future being a part of MSC . More Super marts, Wall marts and Tesco stores are buying eco labeled products not only MSC products the feeling is if you don't have any accredited eco-label you may lose market share as you will be seen as not being clean and green.

One thing that has come out of MSC is that it does cost a lot of money to be accredited as small fishery may be clean and green but there members are not financial enough to be a part of MSC.

This is where I think the State and or Federal Government should be playing a big part in setting up a true Australian ECO label that is internationally recognised. So when Australian seafood products are sold in the world market place there is our own eco label saying we are clean and green. This could put more Australian products in the market place and we do know nothing is free but costs could be shared though all industries who want to get on board.

The cost to the WA Rock Lobster Industry directly was approximately \$300,000 and the overall cost with FRDC Funding was approximately \$2m.

It was generally regarded that our Australian Seafood Products were of high quality and from sustainable industries.

In an effort to increase product marketability there perhaps could be a proposed joint venture between the Seafood/Meat/Wine Industries allowing exposure to all EU countries. The approach needed is “on ground floor marketing” i.e.: approach restaurants by exposure of products direct to the “Chefs” who are in control of the bulk purchasing for restaurants. This, by comparison to the existing Asian/US market - which has product saturation, purchase by consignment, and these practices have been the same in this marketplace over an extended period of time. It would be good business practice for industries to support such events as the ESE, as this is the start of International marketing in the EU, and of what we see to be hard yards ahead to improving the \$/product return.

The most recognizable Australian “Brand” is the kangaroo and Sydney. This highlights the lack of recognition in the marketplace that we have sustainable and world class Rock Lobster/Seafood Products available for export. No current advantage to using “known” brands for the seafood industry.

The initial cost of getting fresh live seafood delivered in a timely fashion to the EU market is a concern with an approximate delivery timeframe of 20 – 30 hours from water to table. It can be done with Processors using initiatives and technology.

Where can we improve –?

- Live fresh lobster and fresh chilled fish
- Incorporation of the CAS magnetic snap freezing technology.
- Hard yards in exposing the product to the core group (end user).

The cost of transporting the frozen seafood product is continually improving with advances in freezing technology such as CAS magnetic snap freezing technology and can be easily sustained which is currently recognized in the EU and as paying premium price for product frozen this way.

My general feel is that we are currently in the high end of the marketplace re: \$/product and need more generic marketing to ensure higher placement of market share. MSC/WCRL was fetching approx 20 pounds or the equivalent of \$50AUD (if you could find the product) It was my experience that the Rock Lobster was not readily available, with many merchants advising they would buy more of the product if easily accessible, high quality sustainable and constant regular supply. The potential for growth in all seafood market places has the potential to be as big as efforts applied.

Our main competitors are Scotland, Iceland, Canada, US and Asian markets which represent many seafood products. The market is currently “on their doorstep” with location and transportation in their favour.

Involve Government to assist in generic marketing, financial assistance, and global exposure initiatives - such as what the ESE has done.

This report has been prepared and experienced first- hand by a Grass Roots Western Rock Lobster Fisherman, whose recommendation is “time to do the hard yards”. It is another cost, but the potential for the seafood industry is deemed to be unlimited.

George Pitt - Tasea Products

- Tasea products – particularly pacific oysters are eligible to access the EU market if sourced from SA.
- The packaging and logistics enable the product to be delivered with sufficient shelf life to enable distribution. There is a lack of awareness regarding Australian seafood in the EU.
- The competition to an Australian pacific oyster is local product from countries including Ireland, France and the UK. Some possible competition exists from Australian companies.
- There are 2 significant competitors from Australia. One is investing heavily in market development and also using other fish to help support the effort, offering a seafood basket. The focus of the other competitor is unclear.
- Tasea will develop a strategy for accessing the EU market but it will be based on low investment using strategic relationships to slowly grow and develop a business.

Packaging Trends

- The trends in packaging reflect the consumer trends in the market place. Currently consumer demand is increasing for ready to cook/ready to eat food as they are looking for reduced prep time, ease of use and perhaps a reduced knowledge as to how to cook and prepare seafood. The packaging as a result mirrors this through the development of gas flushing, skin packing and tray sealing packaging techniques. Within this we are seeing a plethora of different shapes, labels and product preparation. Product preparation includes from basic fillet of fish through completing ready to eat meals, both fresh and frozen.
- Whilst frozen at the moment is experiencing an increase in sales in the EU the trend overtime is very much towards a fresh product. In the UK market growth in fresh is 3-5% above frozen.
- As a general note, traceability or more importantly provenance and sustainability are important depending on the market and consumer awareness. It does differ between the countries. Different countries have different levels of enforcement of labeling laws eg relating to frozen and thawed product for example. Packaging requirements for retail supermarket such as use by, packed on, ingredients, source, country of origin, cooking instructions all appear similar to Australia. A clearly differentiated product via its packaging is oysters that are packed in wooden crates, usually in a bed of seaweed.
- Large food service packs are common for fish, 2-5kg mussels, prawns for example in a sealed tray, fresh and frozen are common. Some are found in a retail environment but mostly food service.
- There are significant differences between countries and the markets, trends, consumer preferences are different and need to be assessed differently between each country.
- There is a significant number of different “eco” labels that have been developed relating to seafood. The result would appear to be that the consumer is getting confused as to what each label represents.
- The focus on ready to eat meals would appear to be increasing the amount of packaging used in and by the industry. Gas flushing requires barrier trays and films for example. Whilst much of these products are recyclable, some are not or have limited recycle use. At least one supermarket is working with their suppliers on a product by product basis regarding their packaging and product presentation. The future of the packaging would appear to be skin packaging in its different forms. There is an agreement some retailers have signed up to requiring a 25% reduction in the amount of packaging by 2010. They are effecting this change through reduced label size, elimination of cardboard boxes, reducing tray thickness and increasing recycling ability.

- Flow wrapped gas flushed product was one of the latest techniques to be used at it is cheaper and more efficient.
- The equipment that is on the market at the moment is designed to pack product using these methods with a focus on enhancing the efficiency, cost and versatility of the machine.

Processing

- The tour did not see processing factories as such. The processing we did see of fish and seafood was done using traditional methods.
- The process of depuration and packing of shellfish was traditional, with no new obvious techniques, equipment or methodologies.
- In the more advanced companies considerable automating was being introduced reducing the workforce requirements and increasing efficiency.
- The ESE had representatives from many companies and equipment manufacturers.

Europe

Some of the observations I would make about Europe and from what I have learnt during this trip include:

- Retail business
 - Spain – more wet/fresh market, less preprepared, packaging started to be offered in supermarkets
 - France – more developed markets, increased use of packaging in presentation of products, acceptance of frozen packaging. Local seafood shop still supplies traditional consumer.
- Wholesale business – development linked to supply of product
 - Spain – wet market, minimal packaging, auction at docks then transferred to market for purchase by wholesalers/distributors, greater wild caught fish.
 - France – increased packaging used, auction at dock, access to more sophisticated supply and distribution chains. Greater focus on aquaculture species. Big chain store businesses eg Metro Cash & Carry.
- Consumer trends vary between country and the EU cannot be treated as a whole.
- An offer based on consistent quality at a price that reflects the quality and the market demographics will succeed.
- Australian management and handling of seafood would appear to be on a par or better than Europe.
- Our volumes are small compared to local production and consumption enabling a focus on niche markets.
- Australia is well positioned to be able to develop the EU as a significant market for our products given trends in consumer awareness, decline on fish stocks and processing knowledge.
- Air freight will become and already is a significant issue in terms of cost, fresh perception and carbon footprint.

Trade Barriers

Political/regulatory – trade barriers identified include tariffs, testing regimes and the bureaucracy.

- Other – freight/logistics, product awareness, country awareness/recognition, language, exchange rate, licensed/accredited processing premises, culture, consumer preferences, development of strategic alliances

ESE

- The bringing together of the seafood industry from all around the world, buyers and suppliers means that ESE is bigger than just Europe. The attendance at ESE of many organisations participating in the industry in a regulatory, representative and development context provide the opportunity for all participants to engage in a forum that improves dialogue and communication.
- Australia participation in ESE – Australia's participation in this event is strategically a necessary investment for the following reasons:
 - Exchange of ideas and innovation
 - Market development
 - Positioning and influence of Australia in the world seafood industry
 - Country awareness – flows through to other products from Australia, enhances individual company development.
 - Participation/engagement and involvement in regulatory bodies and NGO in the seafood industry
 - Size, demographic, wealth and sophistication of the market place

European seafood tour – Ian Nightingale

Introduction

The European Union (EU) is the world's largest market for fish imports. In 2006, the EU's twenty five member countries imported in excess of €16 billion worth of fish and fishery products with exports amounting to €3.5 billion. The EU's trade deficit in fish and fishery products continues to widen and it is now more than €13 billion. With countries like Spain, United Kingdom, France and Denmark dominating the import amounts.

The most significant imported seafood products in value terms are fish fillets (€3.3 billion), crustaceans (€2.1 billion) and fresh or chilled fish excluding fillets (€2billion).

Within the EU there has been significant debate around the social, economic and environmental effects of fishing and fish trade in general. It is expected this will continue to be an important part in the development of future policy designed to ensure the long-term sustainability of fisheries within the EU.

Current fisheries management policy has seen an enormous reduction in catch effort across all EU member countries, resulting in significant social and economic pressures on those regions and communities previously reliant on the fishing industry sectors.

In addition to question of sustainable fisheries policy for EU member countries a major challenge facing policy-makers will be the responsible sourcing of fish products to meet the huge shortfall in production from sustainable fisheries elsewhere in the world.

For example, currently there is discussion in the Commission relating to an initiative to fight Illegal, Unreported and Unregulated (IUU) fishing. This Regulation will require certification to confirm the legality of the origin of all fish and fishery product imported into the European Community.

In its latest 'State of World Fisheries and Aquaculture' report the Food and Agricultural Organisation of the United Nations alerted the international community to the dramatic state of the world's fisheries: about half are fully exploited while another quarter are either over-exploited (17%), depleted (7%), or recovering from depletion.

Governments have introduced new policies to manage the sustainability of fish stocks at the international, national and regional levels. In addition to these public measures, market based private sector mechanisms have also been introduced. Ecolabels are one such mechanism. They designed to influence the purchasing decisions of consumers and the procurement policies of retailers selling fish and seafood products.

Discussion

As a result of being part of Australian Pavilion at the European Seafood Exposition 2008 in Brussels and the pre and post ESE trips in Spain, France and UK bursary recipients were provided with an excellent opportunity to understand more about how sustainability is affecting trade and market access issues.

In addition to meetings with key industry leaders there were meetings with senior staff in the European Commission and the Australian Embassy & Trade Commission in Brussels and Paris. These meeting gave a greater insight into how the EU is dealing with the complex question of sustainability as it relates to fisheries and aquaculture management.

It was very evident that matters of fisheries management and the EU policy position to address the issue of the over exploitation of fish stocks has caused a major restructuring in almost all sectors of the industry. The restructuring has caused significant impact to coastal communities previously dependent on fisheries and fish processing activities. For example when the Manager of Fisheries for Operations & Environment in the Port Vigo was asked what were the three key issues facing sustainable fisheries in Spain his answers was "it is a crisis of where we are going to source sufficient fish product" as fishing effort in Spain has been reduced by as much as 80%. This point of view was mirrored by comments made by industry leaders in France and the UK. In France for example fisheries quotas are reviewed annually with cuts of 15% to 20% per annum expected.

Many people in the fishing industry in Spain, France and the UK feel like they have been “sold-out” with the debate focussing on the broader economic and social issues facing the EU member countries.

Overall the EU direction is to continue to reduce catch effort of all member countries which has seen a fundamental shift in where seafood product is now being sourced. Large fishing companies based in EU are now fishing further off-shore with many companies now establishing joint venture activities in developing countries. This seems a complete contradiction to the EU policy of sourcing fish products from sustainable fisheries, as many of the developing countries do not have the expertise or depth of scientific data to adequately manage fish stocks, particularly with this significant increase in fishing effort to meet the EU demand. This current policy position means that in many cases it has shifted the problem of meeting the short-fall in production of seafood to those countries that do not have the same level of restrictions in place as required by EU countries.

Many buyers and consumers in Spain, France are unaware of where their seafood product is sourced from with buying decisions being driven more by price of the product, relying on their Governments to set appropriate standards for sustainability. However, in the UK there has been a trend by large retailers such as Waitrose to collaborate very actively with organisations such the Marine Stewardship Council (MSC) to give a third party assurance of the sustainability of fish stocks being sold throughout their stores.

This particularly evident when you look at the small number of MSC labelled products in Spain (2) compared with the UK (125) these figures were sourced from MSC for March 2007.

In a recent paper by the GLOBEFISH Research Programme it identified that it was difficult to estimate the volume of ecolabelled products on the international market. MSC as the largest multi-species scheme claims to account for 7% of the world’s total edible wild capture fisheries, but the real volume of traded MSC-labelled products is likely to be significantly less than 1% of global fish trade.

The report goes on to acknowledge there has been little empirical evidence of costs and benefits by producers operating in fisheries that have gained MSC or other forms of eco-certification. In practice, there is no clear evidence of a price premium accruing to eco-certified fish. While there is some evidence of returns related to new business and/or consolidation of market position, these appear to be “diminishing returns” over time as more certified producers enter the market. Any further proliferation of certification schemes and standards raises the issue related to increasing market confusion and the relative equality of schemes.

Throughout the trip where the topic of sustainability was discussed there was a clear recognition that aquaculture is going to be the only sustainable way of meeting the demand for seafood. However, it was also recognised that it was unlikely that aquaculture production in Europe will ever be able meet the short-fall.

Key issues for Australian seafood industry

On an international scale Australia will always be a low volume producer of seafood product. A number of the nations fishing industry sectors are facing further reduction in catch effort as a result of either fisheries management decisions or through the roll-out of Marine Parks and other conservation measures. This will require a greater reliance on imported product for the domestic market creating a similar problem as being faced by EU countries right now.

Most of the overseas markets for Australian seafood will need to be at the upper end of the price scale. Therefore it is more likely the market segment will be relatively affluent, eco-aware and have strong societal interests with an active media. For these markets a high standard of fisheries and aquaculture management policy and practices will become a 'given'. As large distributors and retail outlets take a greater market share of the 'seafood business' producers will need to be able to satisfy the sustainability criteria.

It should be noted that developing countries account for about half of the world's traded fish and seafood products with about 80% of that international trade ending up in developed countries.

Industry will need to be careful they examine the effectiveness of any certification scheme before they sign up, ensuring that it is consistent with the FAO guidelines on eco-labelling and be sure that the proliferation of eco-labels and other ethical product differentiators does not make the consumers choice too difficult as this will decrease the values of the eco-labels over time.

Australia has some of the best managed fisheries and aquaculture in the world, this point must be better promoted in Europe if the industry is to capitalise on this opportunity. Secondly, Australia has well developed Legislation to ensure the ecologically sustainable development of the countries fisheries and aquaculture industries. More work must be done with NGO's and those retail companies promoting eco-labels to reach some level of equivalence of the standards of fisheries and aquaculture management that already exists in Australia. These factors must also play a very big part in any application to review tariff levels for seafood entering the EU.

Quite clearly there is an opportunity for some of Australia's fishing and aquaculture product to meet the specifications of the demanding EU market. However, to enter the top end of the market in the EU it will be a necessary they meet the FAO Code of Conduct for Responsible Fisheries Management at a very minimum.

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Appendix 2

Mentor Reports 2006, 2007, 2008

Roy Palmer ESE Mentor Report May 2006

When we had to make a decision on who would be the 'lucky' Bursary people chosen we struggled to find a clear 'winner'. We could not split the difference between two people and fortunately ways were found to allow them both to experience ESE. These two applications were excellent and were clearly above a highly rated field of applicants.

I had met Alice Hurlbatt previously but could not say that I really knew her and Neil Dorrington was a completely new face to me. I was impressed by their applications but would they fit the bill at the ESE? What might seem like a picnic in Brussels to those who are uninitiated is actually very hard work, generally doing thankless tasks and trying to make the Australian stand a professionally run operation.

We had struggled with obtaining hotel rooms but finally managed to sort things out with Alice being at one hotel with Jayne Gallagher and Neil being with me at another hotel. I spent more time with Neil than Alice, as a result of this.

I met up with Neil (or Dorro as he is well known as) on the Sunday and we organised to visit the stand to see what we could do regarding the preparation. On the Monday Neil and Alice were involved in the WAFIC organised MSC meeting so did not catch up with them till the evening 'get together' at the Sheraton, after which we all went and had dinner with Peter Horvat (FRDC) to get 'our act' together for the next few days. Jayne and I explained what was likely to happen over the next few days and the sorts of tasks that would be required to be organised. We went through the systems that we had in place and made sure everyone was as comfortable as they could be.

The ESE was its normal busy place. You need to have some reasonable systems in place otherwise it becomes amateur hour and that reflects poorly on the enormous amount of organisation that has to go into these events. It is always surprising how poorly organised some companies are and there are always issues that need some quick thinking on the feet to resolve.

Alice was superb. Always friendly, always trying to assist, consistently trying to do 'her bit' on the stand. Was not frightened in speaking to people and ascertain their requirements and steer them to an Aussie producer on the stand. As her report shows she has a great feeling for the industry and I believe she would have benefited greatly from this ESE experience.

Neil was brilliant. Constantly asking questions, never concerned about doing menial tasks, always prepared to play his part in the 'team effort'. It was terrific to have a working fisherman on hand to answer questions. Dorro is not shy in making his thoughts known and has a sharp

and astute mind when it comes to how things could be improved, as can be seen from his report.

Sometimes people do not come up to written expectations but this time was not one of those occasions. Alice and Neil were a credit to themselves as well as the stand and our industry and I congratulate them. If the industry was full of people like them then we would be well off!

I would like to thank SSA/FRDC/WAFIC for the opportunity to be involved. The ESE is hard yakka but it is also a great buzz – we all do a great job but I feel it could be better with some earlier planning and a greater feeling of working together for a common goal.

Best regards

R D Palmer

Mentor Report - Peter Fraser

When the selection committee sat down with the applications for this bursary it was extremely pleasing to see such a diverse range of quality candidates apply to attend the most prestigious seafood event held in the world today.

The decision on “Who” should attend was incredibly difficult as the panel had to compare totally different types of people with widely varying experiences and aspirations.

Our goal as an industry should be to continually offer this type of support to a broad cross section of the industry in order to educate them in global seafood trade, with ESE being by far the best venue to do this.

Our final choice was to split the bursary and offer it to two different types of people, both of which we felt would benefit personally from the experience and more importantly, both of whom we felt would disseminate the information to the broader industry upon their return.

Alice Hurlbatt is a young lady with huge potential in the seafood industry. Her experience gained working with the Western Rock Lobster Council has given her a superb grounding in the industry. It was now time to show her where Australia sits in the Global seafood arena.

Our other recipient was Neil Dorrington, A rock lobster fishermen who has continually been prepared to put his hand up for industry participation roles. He is a well known and respected “Grass roots” fisherman who has previously dabbled in seafood marketing and has broadened his fishing horizons by becoming involved in various other fisheries.

Before leaving for ESE both successful applicants were briefed as to what to expect from the exhibition and what was expected of them.

From their arrival at the show on “Set up” day, both individuals showed their desire to help, to learn and to really become involved. This was exactly what we had hoped to achieve.

Alice made excellent use of her time by talking to a myriad of people from all around the world from numerous different fisheries, both wild and aquaculture. She was always pleasant, she was self confident but aware of her knowledge limitations which made her an excellent person for the role she was given. At the information desk she answered numerous enquiries but most importantly directed the potential customer to the correct Australian on the stand who could strike a commercial deal.

Alice's work ethic was superb and she was a credit to herself and was extremely important in the stands overall success.

Alice learned so much from the experience, far more than even she had expected which is actually the reaction of everyone after their first visit to this "Mega" seafood show. Her report and her debriefs to the industry subsequent to her return show how much she valued the experience and how many new contacts were made.

Over all, Alice was a great success for the industry and for her personal development.

Neil was very keen to be a prominent participant in the organization and running of the stand itself. He showed an amazing work ethic and was utilised more and more by the stand organizers who were able to delegate so many things to Neil who continually surpassed expectations.

In a national stand of this magnitude it is extremely important to have committed people dedicated to ensure the "behind the scenes" work is completed well in order to maintain the "front of house" image, Neil was key to this success.

Neil did have time on the information stand and directed traffic with great aplomb. His personal knowledge experience gained over many years meant that he was able to critique the stands performance. His comments were extremely well thought out and important and will be taken into account by the organizers when assessing future events.

His debrief back in Australia will continue for the next 12 months as he continually attends industry meetings and elaborates on the merits of ESE and "Where to from here" for Australia's participation at future ESE's.

With the undoubted success of these two bursary recipients, it is imperative that this "mentoring" activity continue in the future in order to continually introduce new players into this rapidly changing global environment.

2007 European Seafood Exposition (ESE) Bursary Mentor Report by Roy Palmer

Assisting young Australians with exposures to generic marketing of Australian seafood along with organising and staffing information desk at ESE

Making a decision regarding the choosing of the bursary winners is never easy and this year was no different. There were 8 people vying for the 2 positions and following our assessment process the judging panel chose Scott Walter (CEO, Australian Prawn Farmers Association) and Daryn Logan (Operations Manager, Clarence River Fishermen's Co-op). It was a unanimous decision.

I had met Scott Walter previously but could not say that I really knew him and Daryn Logan was a completely new face to me. I was impressed by their applications but would they fit the bill at the ESE? What might seem like a picnic in Brussels to those who are uninitiated is actually very hard work, generally doing thankless tasks and trying to make the Australian stand a professionally run operation. This coupled with the additional opportunity with a trip to Scotland and the two SEA tours of London and Paris would certainly be testing everyone's stamina and stretch their minds.

After previous experiences with obtaining hotel rooms in Brussels we had planned well ahead this year and had booked well in advance. We would all be together in one hotel which was certainly better than last year.

I met up with Daryn in Edinburgh on Sunday 15 April and we were joined by Scott on the next day. I had organised with Seafood Scotland for Daryn to travel to Peterhead on that day and for him to spend 1 to 2 days in that area meeting fishers, processors, etc. Meanwhile Scott and I went to the "Aquaculture Today" Conference. We finished our tasks in Scotland and headed to London where I had organised with Peter H

We moved onto Brussels and visited the Australian Pavilion at ESE to see what we could do regarding the preparation. On the Monday evening a 'get together' was held at the Sheraton with all of the participants on the pavilion. A number of discussions had taken place with the organising committee to ensure that we had 'our act' together for the next few days. The lads were fully briefed on what was likely to happen over the next few days and the sorts of tasks that would be required to be organised. We went through the systems that we had in place and made sure everyone was as comfortable as they could be.

The ESE was its normal busy place. You need to have some reasonable systems in place otherwise it becomes amateur hour and that reflects poorly on the enormous amount of organisation that has to go into these events. There was more assistance on the information section of the pavilion this year so everyone was able to have time visiting the Exposition. This was also good for me as despite getting my flu jab well in time for the trip succumbed to a flu type bug and was not able to put in as much effort as normal.

Both Scott and Daryn were superb. With one from Aquaculture and one from Wild-catch it was good to see the banter regarding whose product was best! They were always friendly, always trying to assist, consistently trying to ensure that the Pavilion was working well. Neither was frightened in speaking to people and ascertain their requirements and steer them to an Aussie producer on the stand. In addition to this were able to answer general seafood enquiries. Both will be completing reports of their whole 'tour' and I believe that those reports will show that they have benefited greatly from this European experience.

So for the second year in a row I believe this bursary arrangement has been successful. Daryn and Scott were a credit to themselves as well as the Pavilion and our industry and I congratulate them. This bursary arrangement is clearly showing that we do have excellent young people in our industry who are prepared to bring the knowledge that they have to a new area and be able to absorb the opportunity that was on offer. I am positive that the experience they have gained over these last two weeks will hold them in good stead into the future.

The ESE Bursary was a 2 year exercise – I believe that it has been very successful in achieving what it set out to do. The additional trips associated with the 'tour' this year have added value to the knowledge that the bursary people obtain as enables them to get a greater idea of the full supply chain in one of Australian seafood's major markets.

I would like to thank WAFIC/FRDC/SSA for the opportunity to be involved. The ESE is still hard yakka but it is also still a great buzz – we all do a great job but I feel it could be better with some earlier planning and a greater feeling of working together for a common goal. Independence on the Information section of the stand is imperative. The extra trips organised this year were also added bonuses and we must look at how we can add value like this on future ESE visits. Austrade Spain suggested a 3 day tour of Spain following ESE next year.

Best regards

R D Palmer

2008 European Seafood Exposition (ESE) Bursary Report by Roy Palmer

Assisting young Australians with exposures to generic marketing of Australian seafood, getting a greater understanding of the EU along with assisting organisation and staffing of information desk at ESE

MENTOR REPORT

Making a decision regarding the choosing of the bursary winners is never easy and this year was no different. There were 10 people vying for the original 4 positions (2 FRDC and 2 Seafood CRC) and following our assessment process the judging panel (Richard Stevens, Patrick Hone and myself) chose George Pitt (Tasea) and Stephen McLeary (WA Fishing) to represent Seafood CRC and Luke Freeman (Petuna) and Kane Williams (SA Abalone) to represent FRDC. It was a unanimous decision. FRDC offered an additional 'special' bursary to Ian Nightingale (PIRSA) and later WAFIC agreed to offer Kris Carlberg a bursary. In addition it was agreed that if NZ applicant, Donna Wells, came up with the funding for the trip from other sources that we would allow her to travel with us. A similar arrangement was offered to Mandy Collinson by WAFIC. With Donna and Mandy I gave them as much assistance as I could but have not considered them 'bursaries' – they were on all the tours, they were invited to all meetings.

With this number we coped but on reflection having this many people does restrict full opportunities and can be cumbersome in the organisation especially when there are added people on the SEA Tours which are organised around the bursary activities.

Bursary numbers, I feel, should be limited to either 3 or maximum 5 – travel issues, getting approvals into various operations, etc are the main reason but also it allows a lot more time to talk specifically to the bursary people. Going from the 2 last year to 6 was a major difference.

Of the bursary group the only ones that I knew were George Pitt and Ian Nightingale – neither that well. The group got on well together and the mixing with other industry members on Tours

was excellent (few exceptions which will be commented on separately) to the effect that Team Wallaby was created.

From previous experiences with obtaining hotel rooms in Brussels we had planned well ahead this year and had booked well in advance. We would all be together in one hotel for ESE. Permission was sought and granted for myself to do all the group bookings for the bursaries to ensure that we travelled together as a team.

I had organised for the bursaries and Spain Tour group to meet in Madrid on 15 April; the tour started early on 16 April with a visit to MercaMadrid. This is a massive area where all the Markets are situated – the fish market is about 1000 metres long and has 5 rows of wholesalers. Being Spain and being organised in conjunction with my good friend, Jose Manual Fernandez Polanco, we adopted the Spanish way of working with early starts, long lunches and late dinners with lots of meetings and visits in between trying to cover all aspects of the industry. From Madrid we went to Vigo (largest fishing port in Spain) and onto our base at O Grove in Galicia, the centre of aquaculture in Spain. Everyone was kept occupied and from the feedback we seem to have done well with our selections of businesses to make contact with. Hospitality was beyond our wildest expectations – Jose's University allowed him time to organise much of the trip with me, gave him time off to be with us and even 'shouted' the final dinner in O Grove for about 20 of us – somehow cannot imagine this happening here!

We moved onto Brussels and on the Monday most of the Spanish Tour group was under the weather with a stomach bug of some sort – Imodium was the order of the day...

We had Ian and Kane with the team visiting the Australian Government and EU Government regarding trade barrier issues, Steve and Kris attending the MSC meeting and George and Luke helping out with preparations for the pavilion. I was with Jayne Gallagher (SSA/CRC) attending meetings with NOAA/National Seafood Services (USA Embassy for breakfast) where we asked for and tentatively received confirmation to hold the Seafood & Health Conference in Australia late in 2010; visited COST and got some excellent information about how we can link up with EU collaboration on R&D and other other areas through their system and then went to the GlobeFish meeting held at the DG Fish offices. The EU briefing was in full swing when we arrived at the Sheraton – all bursaries in attendance – and then the launch of Australia at ESE 2008 where the WA Minister, Jon Ford, gave a short speech followed by instructions re the stand operations from John Susman and Jayne – with some input from Richard Stevens and myself. Normally that evening we give a full briefing to the bursaries on what was likely to happen over the next few days and the sorts of tasks that would be required to be organised. With some of them 'under the weather' with the bug it was decided to leave that to the next day. Unfortunately I had a bad night with the 'bug' – managed twice to get to the reception area but

had to retreat to the room – and so they went into ESE slightly under prepared and with me a ‘no show’ for the first day.

Everyone thought ESE was busier than usual and a number of comments were received about the quality of people at the event. There was more assistance on the information section of the pavilion this year so everyone was able to have time visiting the Exposition but we were thrown into turmoil with Jayne’s laptop being stolen from the stand on the first evening. This had the first day’s information and early on the second day we struggled to find a suitable computer to record the data needed – Luke came to the rescue. All of the bursaries pulled their weight but probably the stand out on the booth was Steve – a friendlier character you would not meet and he certainly engaged people. I had organised a number of meetings for them to attend to whilst at ESE so they got lots of information re other countries. I also organised a meeting with the Global Aquaculture Alliance with a lot of USA ‘heavyweights’ e.g. George Chamberlain, Bill Herzig, John Connolly, Frank Stevens, Daniel Lee, etc which seemed to go over well.

There were two cocktail parties on the Pavilion – the first was organised for the Pavilion capably organised through Richard Stevens at WAFIC. The second was the Seafood Choices Alliance cocktail party – an opportunity for the Australian industry on the Pavilion to mix with the various green groups in the Alliance as well as some of the major EU Seafood supermarket buyers, etc. Greenpeace had, in my opinion, let themselves down with their protests during the day. This created problems with security and was totally unnecessary.

On the last day of the ESE we assisted with packing up the Pavilion before having to depart for the railway station to catch the train to Paris. We arrived there about 8.30pm and had a few hours sleep before meeting up with the SEA Tour of Paris group, which started at the hotel at 4am. We need to thank Litzie Makhotine for her special efforts on this because after the Rungis Tour (I asked Minister, Jon Ford, to lead us on a minutes silence for ANZAC Day) we met Metro and Picard as well as had a visit to a very large Carrefour supermarket and completed the day at a fabulous seafood restaurant owned by an Australian lady.

From Paris to Grimsby (no doubt a title of a fictional book...) was an interesting train experience – started at 9am in Paris and concluded at 1630 in Grimsby. The team from the Grimsby Institute met us at the St James Fish restaurant and a great meal of Fried Giant Haddock Tails with chips and mushy peas was enjoyed by all. A tour of their facilities, visit to large logistic/transport/storage company Quayside, processor Young’s, oops, The Seafood Company and a Tesco supermarket finished the first day. The second was a mix of Fish Market (where a terrific breakfast was served), Heritage Centre, the brand new Humber Seafood Institute with

side meetings to Sea Chill (Jayne Gallagher), Seafish Authority (Len Stephens and self) and Grimsby Institute (Len, Jayne and self) before we were on the train heading back to London.

Early rising for the last day – the main team went to Billingsgate Fish Market where they met with Chief Inspector, Chris Leftwich, and had a the outstanding Billingsgate kedgereee served by CJ Jackson and a smaller team went to H Foreman & Sons and were royally entertained by Lance Foreman in his brand new purpose built factory situated about 100 metres from the planned London Olympic Stadium. From there both parties converged on Waitrose supermarket at Canary Wharf and from there travelled to Daily Fish Supplies, probably London’s largest fresh fish wholesaler. The legs were getting weary and certainly the ladies were struggling with their shoes so lunch at FishWorks beckoned – a salute to the end of the tour and made even better by young James Moriarty making the extremely generous offer of paying the bill as a ‘thank you’ for the trip.

All the bursaries will be completing reports of their whole ‘tour’ and I believe that those reports will show that they have benefited greatly from this European experience. There will be much to follow through. It is likely that there will be bursary ‘Draft’ reports which will be expanded to give a lot more detail on certain subjects – the fuller reports will be ready in June.

So for the third year in a row I believe this bursary arrangement has been successful. All the official bursaries were a credit to themselves as well as the Pavilion and our industry and I congratulate them. This bursary arrangement is clearly showing that we do have excellent people in our industry who are prepared to bring the knowledge that they have to a new area and be able to absorb the opportunity that was on offer. I am positive that the experience they have gained over these last two weeks will hold them in good stead into the future. I will try and keep in contact with them

The additional trips associated with the ‘tours’ have added lots of extra value to the knowledge that the bursary people obtain as enables them to get a greater idea of the full supply chain in potential Australian seafood’s major markets. Our knowledge is expanding along with our contacts – this has to be a good thing.

Australian Pavilion

Last year I suggested some changes (*shown in italics*) – this table shows response to those changes and other thoughts/ideas from this year in order to consider continual improvement:

Suggestion	2007 Comments	2008 Comments
<i>Investigate the label zapper from ESE or Business Card Recorder to eliminate typing requirements</i>	We had a label zapper this year and believe this helped but have not seen final information re enquiries so uncertain whether worked well. We did not provide daily sheets for Pavilion members like we did last year	The new whizz bank Business Card Scanner worked a treat but losing Jayne Gallagher's computer with all the first day information was a major blow
<i>Need computer on stand</i>	We did this year and was better	Jayne's was used and lost. Maybe we need a spare laptop that we have organised specially
<i>Need a printer on stand</i>	We did this year and was better	And again...
<i>Identifying issue for people on Information desk – tie, scarf, Akubra etc</i>	Many of the Information group had special shirts – this was good. Better if everyone on the information booth has similar 'uniform' – just needs extra planning	Shirts worked well – need to plan Info booth more in advance again to get this right
<i>Larger presence from other states to create more Australian stand aspect</i>	Believe this was achieved this year but always open to continuous improvement	Not many companies presenting but was a spread and will be keen to see this develop
<i>See through panels on enclosed spaces so corner stands do not look and feel like</i>	Was achieved by having different style of stand. Understand	Still to be considered. Few meeting rooms would have been handy

<i>they are separate</i>	was request for private booths for 2008 but we need to be able to see in them.	
<i>Better organization for brochures, business cards, etc – e.g. stands for them to go in as against sitting on benches</i>	This was not achieved and is area for improvement for 2008	Much improved. Comments about storage areas for each supplier
<i>Don't need a bar area</i>	No bar this year – had kitchen area instead which went over well but maybe dominated by a few groups. Sitting around that area needs to be discouraged	Seemed to work much better this year. John Susman did excellent job in that area
<i>Need more vision points</i>	Was achieved this year	Not as many as last year
<i>Need to be better organised more in advance than we currently are</i>	Again was left to last few months and we must improve on this	Similar complaint – first meeting this time is 22 May
<i>If Austrade are to be involved then it must be clear what roles they play</i>	Not sure if this was spelt out but felt Austrade role was improved this year. They were helpful on Tours and in giving some market background – this needs to be expanded	Austrade fell into a 'hole' this year in my opinion. Did not appear at EU Briefing. Pendulum swinging – maybe we need to offer them space for a price
<i>We need a planning meeting in July to start preparing for next year and take in all of the comments we have received from this year's effort</i>	Didn't happen and is something that needs to be done this time around	Didn't happen again – must happen for 2009
2007 Suggestions – in addition to above		

<p>Consideration to best placement on pavilion for meetings, information area and kitchen area. Information area needs to be 'first port of call' and don't think it achieved that – maybe should be where meeting area was but more to front and corner</p>		<p>Much better this year</p>
<p>Meeting area might be best on opposite side to where it was this year</p>		<p>Yes and it worked</p>
<p>Kitchen area might be best expanded and more central</p>		<p>Yes and it worked</p>
<p>Overall consideration of use of pavilion for parties and presentations/talks as didn't think flowed well and hard to hear speeches</p>		<p>Was better but we need to think this through for 2009</p>
<p>Would like to see the pavilion be shown to be more Australian – maybe a large flag could be used</p>		<p>Was better but was still referred to as WAFIC Pavilion</p>
<p>With ANZAC Day falling just after ESE next year every effort should be made to get a Aust politicians (aim for Ministers) involved in understanding about our efforts in this market place, whilst they are on their way to the various ANZAC memorials</p>		<p>Well we got WA Minister there with some of his Opposition. Need to plan much earlier on this</p>
<p>Also with ANZAC Day the State Govts (we met WA group in Paris this year) choose a small number of children to go to the memorials. Maybe we should link with that and get the children along to ESE</p>		<p>We didn't but maybe as well with all the other activities going on</p>

2008 Suggestions – in addition to above		
Consider joining forces with NZ		
Get things happening early		
Financial Plan and Operation Plan to be organised – try to get Fed Govt involvement		
Review Cooking with John Susman, Peter Horvat and Chefs		
One bursary could be Young Lexus Chef of the year sponsored by FRDC		
Some sort of contest between England and Australia		
Have one of the Cocktail Parties as a Invite only to major EU buyers – a Special Australian Preview – fine food, fine wines		
Information booth – need some regulars boosted by bursary people		
Limit bursaries to 3 or max 5		
Special Tours – max nr of people – if you are on the tour then you move with the tour, are on the bus, etc e.g. cannot come and go along the way		

I would like to thank WAFIC/FRDC/CRC for the opportunity to be involved. The ESE is hard yakka but it is also a great buzz – we all do a great job but I feel it could be better with some earlier planning and a greater feeling of working together for a common goal. I think I achieved

that on the tours and I look forward to having some influence on the Australian Pavilion on behalf of SEA in oncoming years. Independence on the Information section of the stand is imperative. The extra trips organised this year were also added bonuses and we must look at how we can add value like this on future ESE visits. The buzz is for tours to Ireland and Scotland for next year.

We cannot let this year pass without a special mention to Richard Stevens – he has built this event for WAFIC and the Australian Seafood Industry over the years. Anyone who has been involved in organising such events can appreciate the work involved, the continuous improvement and the genuine desire to create a niche for the industry in the ‘sustainable environment’ which we live. Richard has done a marvellous job and his shoes will be hard to fill for the oncoming years – I hope we can find a way to retain his services in some way.

Best regards

R D Palmer