



## Abalone Council Australia Ltd:

### Strategic Plan 2007-2017

*Managing the Future of the Australian  
Wildcatch Abalone Industry*

#### THE FUTURE OF THE INDUSTRY:

In 2005, the Abalone Council Australia Limited commissioned an analysis of the industry and its market environment. In that comprehensive study David McKinna described the industry as *"reaching a crossroad in its history. Despite the fact that it is one of the most valuable fisheries in the world, and despite its market leadership position, it is not realising the true potential of the resource."*

In the last 4 years the individual State Abalone Associations have united in a joint effort to address the significant challenges faced and opportunities available to the wild capture abalone industry. Together industry leaders have launched the Abalone Council Australia Ltd as the national peak industry body for the wild catch industry.

The ACA presents this Strategic Plan as the first national approach to investing in the industry's future. Through dedicated market research and promotion, continuing investment in R&D projects, open communication channels and collaboration of industry knowledge, the Association aims to achieve its **Mission: to create a healthy fishery resource managed for the benefit of the industry and the Australian community.**



## Foreword

The Fisheries Research and Development Corporation congratulates the Abalone Council of Australia on taking this significant initiative to develop a Strategic Plan through to 2017.

We believe the plan is a critical first step in focusing investment on the areas of most benefit to the industry.

Together with the new Seafood CRC we will be pleased to work with the industry to establish a solid and predictable funding base for collaborative investment in innovative Research & Development into the next decade.

Dr Patrick Hone

## Acknowledgements

The Abalone Council Australia Ltd wishes to acknowledge and thank the following who contributed funding, time and resources to the strategic planning process:

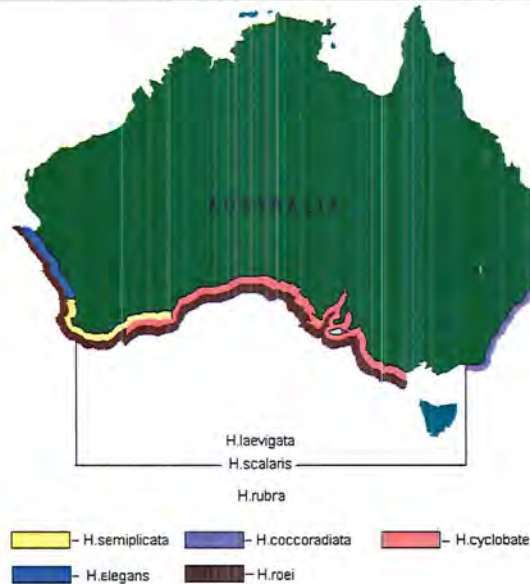
### Funding:

The Fisheries Research and Development Corporation



### Project Manager:

Michael Tokley



### Time and Resources:

Numerous organisations contributed at the planning workshops, and/or made written and verbal contributions to the plan.

- Tasmanian Abalone Council
- Tasmanian Seafoods
- Abalone Industry Association of SA Inc.
- Victorian Abalone Processors Association
- WA Abalone Industry Association
- Abalone Association of Australasia Inc
- Abalone Council of NSW Ltd

We also thank industry members Dean Lisson, John Hault, Tony Johnston, Kerry Rowe, Bob Pennington, David Tonkin, Duncan Worthington, John Smythe, Harry Peeters, Ian Taylor, Dr Patrick Hone and Jayne Gallagher.

The ACA thanks Ewan Colquhoun and Alice Cameron of Ridge Partners for leading the planning process and producing the plan.

## Industry Goals: 2017

- An Australian national wild abalone Brand driven by a national Quality Assurance and Product Integrity Program
- Increased industry GVP (in real terms):
  - 2012 - by 25% to \$268 million
  - 2017 - by 50% to \$321 million.
- Reduction in illegal harvest (real terms):
  - 2012 - by 50% in value to \$11 million
  - 2017 - by 75% in value to \$5 million.
- A National Biosecurity Code of Practice adopted by all wild and aquaculture abalone operators
- All wild fishers are members of the ACA Ltd.

## Catch and Trade

Figure 1. Historical Abalone Figures  
GVP, Estimated Illegal Trade & Export Figures

	(\$mil)	2002/03	2003/04	2004/05
<b>GVP</b>		216.2	196.2	229.6
<b>Est. Illegal Trade*</b>		21.6	19.6	22.9
<b>Exports</b>				
China		3.1	1.5	16.0
Chinese Taipei		16.9	22.4	16.9
Hong Kong		100.8	140.2	146.5
Japan		52.2	45.2	51.7
Singapore		20.5	17.5	23.0
United States		3.9	4.1	2.8
Other		8.4	6.4	6.0
<b>Total Export</b>		216.1	237.6	263.1

\* The exact value of illegal abalone trade is unknown. In FRDC Project 1998/170 – Wild Abalone Fisheries Research and Development Needs Review, it was estimated that illegal trade equated to 10% of the GVP.

## The Market in 2007

Australia is currently the dominant player in the world abalone market, supplying around half of wild catch product and 30% of global product. Australian product is well regarded.

Despite this dominance Australian industry remains largely unbranded in the volatile spot market, exposed to global trade vagaries with little control of its own destiny.

China, Japan and Taiwan remain the largest consumers of Australian abalone. Research indicates growth in the Chinese market will continue for the foreseeable future, driven by rising living standards. Limited sales occur in the Australian domestic market, and the impact of illegal catch on this market is not quantified.

Industry has a poor understanding of its consumers and what rising incomes mean for consumption and prices. Research also confirms that prices are constrained and volatile, product integrity is variable and manipulated, and little is known about the value-adding preferences and options. Harvesters and quota holders treat abalone as a commodity with product being 'pushed' into the market with no strategic approach.

As a consequence margins are low and uncontrollable for most chain participants.

## Drivers for Change

- Poor returns to industry
- Illegal harvesting
- Increased competition from aquaculture, 38% of supply
- Expanding Marine Parks
- Biosecurity
- Supply chain manipulation
- Strong Asian market demand
- Overseas wild catch competitors
- Aging fisher population
- Marine environmental sustainability



## Challenges facing the industry

- Fragmentation, in managing the industry, in sustaining the resource and in servicing supply chains.
- Limited understanding of consumers' preferences and the socio-economic drivers impacting traditional markets.
- Poor planning and complacency in dealing with issues leads to limited agripolitical influence.
- Limited brand recognition for Australian products in markets.
- Low levels of investment in innovation and industry development.
- No uniform Codes of Practice, Environmental Management Systems (EMS) or product standards.
- Increased market penetration of competitively priced high quality aquaculture products.
- Strategy and policy dominated by resource managers and technologists rather than those with commercial and market experience.
- An estimated \$23 million (10%) of the total Australian wild catch is illegally caught and traded.
- Increasing constraints to industry accessing the resource.
- Low margins and price volatility for most supply chain members.
- Product manipulation mid-chain.

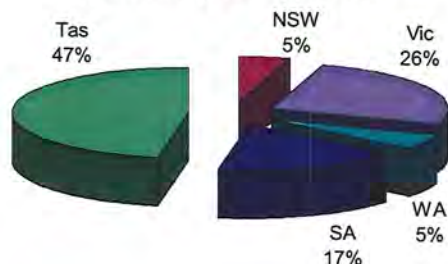


# Strategic Issues

## Industry Organisation and Management

- Lack of commitment by state and zonal fishers to a strong single national Abalone Council Australia has impeded communication, representation and agency engagement, and supply chain management.
- Fragmented and poor engagement with governments and fishery managers limits opportunity for harmonization of environmental and biosecurity matters, fishery access and cost effective co-investment for research.
- Different levels of state development with Tasmania leading the way in regional unity and industry commitment.

Production (volume) per State



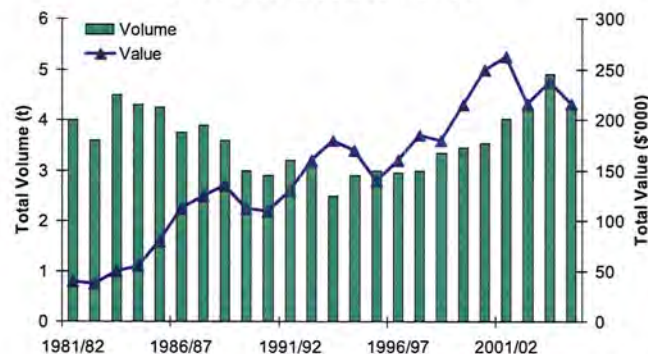
## Sustainability

- Biosecurity risks are significant and demand joint management by the wild catch and farming sectors.
- Industry will increasingly face challenges to its access to the resource. Competing uses (Marine Parks) will continue to gain favour with the community. To ensure its access industry must respond to these challenges with comprehensive stewardship programs that demonstrate compliance, and clear measures that preserve its access rights.

## Market Planning and Development

- Abalone is the most highly revered luxury food in Chinese culture. Australian industry has little knowledge of consumer preferences or segments, and most continue to sell abalone as a commodity - they are weak sellers and price takers.

Australian Exports of Abalone



- No Australian brand has a strong franchise with consumers or customers in key Asian markets. Industry does not differentiate its product from competitors thorough promotion or branding. There is little active market segmentation (species, regions, wild catch, farmed, live, frozen, dried, etc).
- Fishers have no control over product in the supply chain and lose margin through product manipulation - product weight, repackaging and labelling, freezing, etc. The reputation of Australian product has suffered.
- The dominance of the export market means Australian fishers and processors are greatly exposed to currency fluctuations.
- Beach pricing mechanisms and currency exposure add to price volatility and investment risk. Many importers and wholesalers will not trade in Australian product or will switch to more stable alternatives.

## Fishery Access and Harvest

- Illegal access to the fishery is a major cost to the industry and risk to the wild resource. Industry must join with other legal users of the marine waters to establish effective measures to greatly reduce or eliminate illegal harvest and trade.
- Industry lacks a standard product trading language that links to Codes of Practice and Environmental Management Systems. It is not able to effectively manage harvest yield and the integrity of product going to market.
- While industry has made some investment in improved fishery management it has made little investment in the commercial optimisation of the yield from the wild resource.

## Human Resources

- The industry's ongoing access to the fishery demands a greater investment in the skills and professional capacity of operators in the fishery.
- Industry skills, practices and training must be harmonised across fishery jurisdictions to reduce cost, promote skills portability and retention, and provide the capacity for industry to grow.



## Investment Platform 1: PRODUCT DEVELOPMENT & MARKET MANAGEMENT

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. Develop a whole-of-chain approach to market development	a. ACA Ltd to work with fishers, processors and value adders to establish a whole-of-chain approach to creating premium Australian products and servicing consumers ✓ b. Work with state fishery managers to streamline fishery access and harvest activities? c. Work with industry to develop long term fish supply contracts for guaranteed quality, supply and delivery? d. Ensure fishers, processors and marketers are aware export orders mandate traceability from 1 Jul 2007 ✓	Commenced with 2009 -723; CRC China project – Dec 2008 Commenced July 2009 with CRC QA CoP project  Completed via AAAI? /AQIS	
2. Develop an ACA Ltd QA and Product Integrity Program as a basis for brand differentiation and a higher selling price for Australian abalone	e. Establish an ACA Ltd Quality Assurance and Product Integrity Program through the supply chain that is applied to all legally harvested Australian abalone. Program to involve fishers, processors, exporter/importers, and handlers. ✓ f. Determine the product quality and integrity parameters specific to each product type – wild and aquaculture, species, region, fresh, frozen, canned, dried, drained weight, repackaging, labeling, refrozen product, etc ✓ g. Define objective measures for each quality and integrity parameter ✓ h. Establish an audit process to ensure compliance by all parties along the legal-harvest supply chain with the QA and Product Integrity program ✓ i. Ensure State licensing of abalone fishers and aquaculturists is harmonised nationally and States endorse use of a national QA and Product Integrity program? j. Where possible use the quality assurance scheme as a tool to identify and limit illegal access, harvest and trade in abalone	Commenced July 2009 with CRC QA CoP project Commenced Dec 2008 as part of CRC China project 2009-723  Remove? Possible side benefit of CRC China and QA CoP projects	
3. Establish an Australian Abalone Mark or Brand	k. Establish a domestic and international brand / mark for Australian abalone based on world leading environmental practice, sustainable fisheries, guaranteed quality, and high product integrity underpinned by traceability ✓ l. Establish an ACA Ltd owned company to service supply chain with access to Industry Intellectual Property held by ACA Ltd (e.g. integrity mark or brand, Code of Practice, QA and Product Integrity Program, EMS Certification, etc) * m. New entity to establish a standard license agreement and fee scale for access to its intellectual property * n. New entity to support and promote industry alliances and service delivery with accredited resellers in key markets *	Commenced Dec 2008 as part of CRC China project 2009-723 Commenced July 2009 with CRC QA CoP project  *No progress to date but likely under CRC China and QA CoP projects	
4. Create new products for increasingly wealthy Asian consumers	o. Conduct market research and product development for new consumer products: ✓ i. Live product, including extended shelf life ii. Canned, frozen, dried and processed products iii. Consumer preferences in taste, texture, colour, lip structure, size, iv. Whole or cut, wild or farmed, cooking shrinkage v. Alternative packaging other than cans vi. Market opportunities for byproducts such as shell and viscera	Ongoing – TAC provides three Market Analysis Partners (MAP) reports as basis for CRC China project – also as 2009-723 progresses, product development opportunities will arise  Potential for High Pressure Processing-Bob Fleming project	
5. Complete in-market research regarding live abalone markets	p. Explore joint opportunities for Tasmanian and national wild industry to assess export market opportunities for branded wild abalone ✓ q. Work with the FRDC and the Seafood CRC to arrange cost effective funding for joint research ✓	Commenced Dec 2008 as part of CRC China project 2009 -723 ✓ FRDC project 2005/231/241 (McKinna-Scoping Study ACA)	
6. Establish a pilot promotional program	r. Identify opportunities for a promotion of branded Australian abalone in selected key markets ✓ s. Seek industry investment in pilot promotion program ✓	Commenced Dec 2008 as part of CRC China project 2009-723	

## Investment Platform 2: FISHERY ACCESS

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. Establish a national high value seafood task force to address illegal harvesting and trade	a. Work with State and Federal agencies to establish a National Illegal Seafood Trade Task Force that will implement a national strategy to combat illegal harvest b. As part of the ACA Ltd QA and Product Integrity program, develop a traceability system for domestic and exported animals to collate through-chain knowledge on illegally harvested and traded abalone ✓ c. Develop consumer and market awareness of environmental degradation caused by illegal harvest of abalone?	<i>Stalled</i>  <i>Commenced as part of CRC QA CoP project</i>  <i>Remove?</i>	
2. Establish an industry wide EMS to demonstrate good environmental performance	d. Work with industry, stakeholders and agencies to develop an EMS for the national abalone industry to guarantee resource sustainability and ongoing access to the resource * e. Identify the EMS criteria that will be linked to the "Clean and Green" fishery brand that the ACA Ltd will develop * f. Establish penalties for non compliance with the EMS *	<i>*Need to consider the worth of an EMS Cost/benefit analysis??</i>	
3. Confirm shares of allowable catch for commercial, recreational and indigenous fishers	g. Work with State fishery managers to develop a nationally unified approach to commercial, recreational and indigenous abalone harvest quotas. Base this on the deed of Agreement reached for the Tasmanian industry.* h. Liaise with agencies on the ongoing development of marine parks and industry exclusion areas * i. Negotiate agreement that any erosion of agreed quota will result in compensation *	<i>*Can any of these objectives be obtained at a national level or are they state based matters? Different legislative requirements may be an impediment</i>	

## Investment Platform 3: HARVEST OPTIMISATION

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. All harvest operators complying with ACA LTD Code of Practice	a. Develop a national wild abalone industry Code of Practice that will include at least OH&S, Food Safety and Environmental Practices ✓ b. Make compliance all parts of the Code a prerequisite for fishers/supply chain members to access the ACA Ltd brand promoting Clean and Green Australian Abalone ✓ c. Establish schedule of penalties for non compliance with the Code ✓	<i>Commenced July 2009 with CRC QA CoP project            Should OH&amp;S, Food Safety and Environmental practices be incorporated into this project???</i>	
2. Establish management tools and models that enable targeted harvesting of fish to optimise market returns (spatial and temporal)	d. Quantify potential sustainable fishery biomass and harvest yield within biological parameters ✓ e. Work with related marine users (ie Southern Rock Lobster) to develop an integrated multi-species management scheme to harmonise harvest procedures and minimise harmful cross industry effects * f. Develop an efficient, cost effective fishery and stock monitoring? process that utilises commercial abalone divers to provide critical in-water information for the management of resources <sup>1</sup>	✓ FRDC project 2004/004 conducted by CSIRO ✓ FRDC projects 2004/013, <sup>1</sup> 2005/029 & 2006/029 (Mundy-GPS) conducted by UTAS ✓ FRDC projects 2004/019(Mayfield) & 2006/046(Middleton) conducted by SARDI ✓ FRDC project 2005/024 conducted by UNI MELB *FRDC projects 2009/016 & 2007/045 (Centrostephanus) by UTAS and 2006/046(EBFM – Jenkins ✓FRDC TRF 2008/097 (Worthington Ab Council NSW) Fay Helidoniotis PhD. Characterizing the Growth of Blacklip Abalone (Haliotis rubra), with the Implications for its Ecology and Fishery.	
3. Develop techniques to increase marketable yield per fish	g. Develop harvest optimisation models that integrate consumer-market research, post harvest and product development, and fine scale fishery management h. Use harvest models to guide harvest practices and optimise the biomass and yield of the fishery i. Based on research and modeling of markets, fishery management and post harvest, investigate techniques that increase marketable yield per fish?	<i>Proposed Mundy/ Moltschaniwskj Blacklip product quality and stress project?            ✓ CRC project 2007/061 Fishery Performance Indicators workshop (Tokley ACA)            FRDC project 2007/020 PI-MSE (Haddon Mundy Mayfield et al).            ✓ Proposed Mayfield et al. greenlip product quality PhD project            Proposed Mayfield et al. greenlip population structure project            ?CRC China project 2009-723??</i>	
4. Benchmark harvest performance	j. Conduct industry, competitor and market research to develop relevant benchmarks to better manage industry practice and performance. This research may be used to attract outside investment, set profit margins, compare aquaculture to wild catch operations and track the industry's financial cycles* k. Utilise benchmarking results to differentiate and promote Australian abalone to high value niche markets, domestically and internationally* l. Communicate benchmarking results to industry fishers, processors and marketers as an incentive to invest in improved harvest practices*	* Possible National Benchmarking project based on FRDC TRF application Application Reference: VG005 "Economic Assessment of the Impacts of Marine Parks and Abalone Viral Ganglioneuritis (AVG) on the Victorian Abalone Fishery and Industry"	

## Investment Platform 4: HUMAN CAPACITY & COMMUNICATION

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. Conduct industry and human resource audit as basis for an industry training plan	a. Commission an industry skills audit to identify the depth of human capacity available and required (next 5 years) within the industry* b. Establish a national Industry Training Plan to build human capacity, possibly through the Agrifood Skills Council* c. Compile and maintain an industry skills database as a reference for skills development and industry succession*	<i>*Not yet commenced</i>	
2. Develop options for greater integration of information technologies across stakeholders and the supply chain	d. Work with State and Industry bodies to link existing data bases to provide clearer strategies throughout the chain? e. Establish benchmarking criteria and tools that deliver relevant performance and productivity measures to fishers and stakeholders? f. Investigate IT and ecommerce options to improve the efficiency of supply chains g. Investigate and encourage alliances and joint development programs with IT companies and other food industries	<i>The 2<sup>nd</sup> phase of the "Using electronic data for fine scale assessment and management of abalone fisheries" – application reference CM012</i>  <i>All sounds good but no progress to date</i>	
3. Establish an ACA Ltd Communication Plan that integrates information and data from all operators and communicates with stakeholders	h. Establish a transparent register of fishers and their relevant accreditations? i. Identify key information that requires communication throughout the supply chain? j. Establish a 'user friendly' method of industry communication to stakeholders, regional fisher communities, and agencies k. Emphasis specific education to fishers regarding the QA and Product Integrity program and compliance with the ACA Ltd Codes of Practice✓	<i>ACA Website?? National Abalone Conventions (4 held to date)</i>  <i>Accredited training package will be part of CRC QA CoP project</i>	
4. Develop a national industry skills exchange and mentoring program	l. Within the industry training plan, identify areas of skills need and facilitate cost effective learning programs thru mentoring and industry network support m. Promote and strengthen existing interstate skills exchange programs	<i>National dive modules already in existence QA CoP project will have accredited training modules</i>	
5. Establish an industry leadership and succession plan	n. Assess the opportunity for young people (<35 yrs) to take up roles in industry and actively participate in industry leadership o. Identify ways to encourage experienced people to remain and attract young people to the industry	<i>Young Leaders program CRC Emerging Leaders project 2008/759 (Tokley ACA)</i>	
6. Establish an ACA Ltd Governance/ directors skills program	p. Establish a program of director education and Board performance to meet the standards established by the ASIC and the ACA Ltd Charter of Good Governance	<i>Australian Institute of Company Directors – Introductory courses available</i>	

## Investment Platform 5: SUSTAINABILITY & ENVIRONMENT

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. Ensure compliance with Environmental Protection and Biodiversity Compliance Act (EPBC) guidelines	a. Identify and confirm fishery management requirements in each jurisdiction through direct contact with relevant state and federal agencies b. Work with state and federal agencies to align and harmonise fishery access and management arrangements to ensure resource integrity, optimize catch yield and quality, and cost effectiveness? c. Ensure environmental compliance (EPBC Act) is a core element of communication with fishers and resource users? d. Demonstrate industry is compliant with environmental guidelines (EPBC Act) and fishery management requirements through regular environmental monitoring reviews? e. Support continuation of existing FRDC projects f. ACA Ltd Executive Officer to meet regularly with key agencies including DEH	✓ <i>FRDC project 2006/040 (Jenkins) conducted by DPI Victoria</i> <i>FRDC project 2005/024 conducted by UNI MELB &amp; my E-data project 2006/029 could fall into this category as well</i> <i>FRDC current round CM0012 2<sup>nd</sup> phase of the Tassie E-data applicable here</i> ✓  <i>Ongoing</i> <i>Ongoing</i>	
2. Develop a <b>Risk Management Plan</b> that mitigates the introduction of pests and diseases into the marine environment	g. Work with all stakeholders to undertake a comprehensive pest and disease risk assessment process h. Develop, implement and review a pest and disease management plan across all wild and aquaculture abalone fisheries i. Within the Plan develop a pest and disease monitoring program self-managed by industry participants j. Conduct reviews (at least annually) of pest and disease monitoring system across the abalone industry to identify weak points, risks and remedial actions k. Work with other marine base industries to develop a communication system for the transfer of pest and disease information and up-dates l. Maintain Ecosystem and Habitat Integrity	✓ <i>FRDC project 2004/084 (Perkinsus) conducted by NSW DPI</i> ✓ <i>FRDC project 2009/032 (Crane- AAHL)</i> ✓ <i>FRDC project 2009/016,2007/045 (Centro-Johnson) UTAS</i> ✓ <i>FRDC project 2008/209 (translocation/reseeding) WADA</i> ✓ <i>FRDC projects 2008/076/077 (Peeters/WADA)</i>  <i>FRDC project 2007/045; Johnston et al</i>	
3. Develop a pest and disease <b>Outbreak Response Plan</b> in collaboration with other stakeholders	m. Develop specific management strategies which incorporate disease monitoring, detection, response and control measures in both wild and farmed abalone stocks n. Work with other marine based industries to develop an early detection system for pests and disease	✓ <i>FRDC project 2008/055 (Crane- AAHL)</i> ✓ <i>FRDC project 2007/066 (Gorfine – Uni MELB)</i> ✓ <i>FRDC project 2007/006 (Crane/AAHL)</i> ✓ <i>FRDC project 2006/243 (Doroudi/DPI-Vic)</i>	
4. Identify and communicate impact of land based industries on the fishery environment	o. Collate existing research in this area (ie FRDC, ABARE etc) and communicate findings to industry p. Join with other seafood industries to undertake a research project to assess terrestrial industry impacts on fishery sustainability and quality	<i>No progression to date</i>  <i>No progression to date</i>	
5. Collaborate with relevant parties to understand the impact of climate change on the fishery environment	q. Develop contacts and collaborative alliances with stakeholders who have an interest in climate change and the marine environments r. Jointly encourage and invest in projects to investigate and report on the direct and indirect relationships and impacts of climate change on the fishery environment	✓ <i>FRDC/CRC project 2005/029 (Mair/Mundy Translocation) CRC/UTAS</i> <i>ARC-Linkage project at Univ Adelaide - Connell</i>	

## Investment Platform 5: RUNNING THE ACA LTD BUSINESS

OBJECTIVES	ACTIONS	STATUS	OUTCOMES
1. Ensure effective national wild industry planning	a. Develop and maintain a 5 year National Wild Abalone Industry Strategic Plan supported by all fishers ✓ b. Consult at least every second year with fishers, consumers, supply chain participants, researchers and agencies to ensure plans address current strategic issues are opportunities ✓	✓ <i>FRDC project 2007/311 (ACA)</i>  <i>First Strategic Plan review September 2009</i>	<i>Strategic Plan completed May 2007</i>
2. Maintain good corporate governance practices	c. By Dec 2007, establish an ACA Ltd charter of good corporate governance that is reviewed annually re its compliance with ASIC requirements ✓ d. Chair to look to expand the ACA Ltd Board capability to manage industry and market risks through selective secondments or appropriate appointments	<i>Draft ACA Governance Charter under development</i>	
3. Build mutually beneficial relations with key agencies to build industry investment and research efficiency	e. Partner with the FRDC to provide national R&D planning input ✓ f. Establish a service contract with the Seafood CRC to manage the portfolio of wild abalone development projects currently in place or being developed ✓	✓ <i>FRDC project 2007/311 conducted by ACA Ltd</i> ✓ <i>FRDC MT009 Australian abalone industry R&amp;D planning, implementation and utilisation.</i>	
4. Establish an ACA Ltd Business Plan that promotes growth through commercial business development initiatives	g. By Sept 2007, complete a consultancy to identify business structures, budgets and management arrangements for the development of new intellectual property assets – Industry Chain QA Plan, Industry EMS, Industry training package, etc h. By January 2010, establish external funding sources and management systems that demonstrate to industry ACA Ltd's capacity to lead industry, represent industry to governments and agencies, and manage industry affairs and investments in innovation ✓	<i>Not yet commenced</i>  <i>Work in progress</i>	

## Staged Strategy 2007-2017

Goals	Short Term 2007-09	Medium Term 2009-12	Long Term 2012-17
<b>Building the Platform for Growth</b> <ul style="list-style-type: none"> <li>Build National Industry cohesion, management &amp; leadership to support ACA Ltd</li> <li>Establish NewAbCo Pty Ltd Business Plan &amp; company structure</li> <li>Initiate project management &amp; planning with CRC &amp; FRDC</li> <li>Design Quality Assurance System, Code of Practice and industry EMS Platform</li> <li>Establish an National Industry Communication Plan</li> </ul>			
<b>Focus on Our Customers</b> <ul style="list-style-type: none"> <li>Undertake Market Research as a National Industry in key overseas markets</li> <li>Establish Quality Assurance and Product Integrity System</li> <li>Establish Australian product branding and quality mark</li> </ul>			
<b>Managing Risks and Margins</b> <ul style="list-style-type: none"> <li>Establish a Biosecurity Plan jointly with other marine users and aquaculture</li> <li>Establish and implement joint cross industry initiative to eradicate Illegal trade</li> <li>Complete a skills audit and Training Plan for the Industry</li> <li>Implement a nationally funded wild catch promotion campaign in key markets</li> </ul>			

**ACA Ltd** will work with state fishers to represent all Australian wild catch fishers as its members.

ACA Ltd will manage the R&D portfolio for the industry and develop Codes of Practice, and other IP assets for the benefit of industry.

**NewAbCo Pty Ltd** will be established as a commercial subsidiary to service stakeholders and license industry IP assets held by ACA Ltd.

