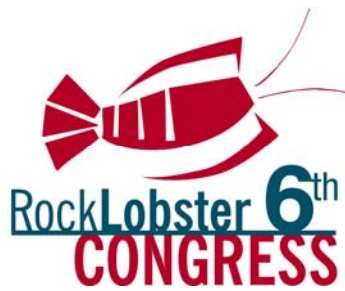


**People development program: 6th National Rocklobster
Congress - sustaining industry profits**

Mr Roger Edwards



**People development program: 6th National Rocklobster
Congress - sustaining industry profits**

Project No 2008/352

Principal Investigator – Mr Roger Edwards

November 2009

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The Fisheries Research and Development Corporation plans, invests in and manages fisheries research and development throughout Australia. It is a statutory authority within the portfolio of the federal Minister for Agriculture, Fisheries and Forestry, jointly funded by the Australian Government and the fishing industry.

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Non – Technical Summary

Project Title: 6th National Rocklobster Congress
Project Number: 2008/352
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The 6th National Rocklobster Congress was hosted by the South Australian Rocklobster Advisory Council in partnership with Southern Rocklobster Limited. The Congress was supported with major sponsorship from the Fisheries Research and Development Corporation.

The event was held over three days with a Young Leaders Workshop and various industry meetings on the first day and the Congress proceedings on days two and three.

The meeting was attended by 160 participants from across Australia, New Zealand and Papua New Guinea. Representatives were present from all stakeholder groups including fishers, managers, researchers and the export sector.

The focus of the meeting was the 'Next Generation' with specific themes aimed at developing and promoting the future leaders of the industry. The key program areas were marketing for profit, managing for profit and climate and energy. Twenty six speakers addressed a host of topics within the program areas, with panel and summary sessions as part of the program.

Key issues for action which emerged from the meeting included:

1. pursuing industry engagement in climate change,
2. expansion of economic data gathering along the lines of the South Australian program, to other States and
3. developing a business case for an industry marketing levy.

In addition an overall message emerged concerning the importance of building large stocks and maintaining the biomass, as a means to smoothing economic impacts on industry of short term recruitment fluctuations and to achieving higher levels of profitability.

Apart from the formal proceedings, a series of networking social events were undertaken including the National Species Taste Off which was won by Southern Rocklobster. An informal meet and greet was also held along with the traditional Annual Dinner.

The meeting attracted strong levels of sponsorship from a range of industry partners and achieved sufficient registrations to allow a break even result.

An industry executives meeting was held at the end of the Congress where responsibilities for progressing initiatives were assigned.

Acknowledgements

The organising group wishes to thank the FRDC for its solid support for the National Lobster Congress. In addition thanks go to all the sponsors along with the industry executives around the lobster nation who provided input to developing the program. Finally thank you to all the speakers who voluntarily gave their time to present at the meeting and naturally to all those who attended, thank you for making the effort. The strong desire expressed at the end of the meeting to meet again in 2011, is sound endorsement for the concept.

Background

The rocklobster industry is one of the most valuable seafood industries in Australia valued in excess of \$400 million per annum in 2008-09. However an estimated \$200 million per annum has been lost nationally in the last 2 years, as the catches across the major species have contracted.

The 1st National Rocklobster Congress - Adelaide 1999, created a benchmark for the Australian seafood industry in information exchange. Ten years and 5 Congresses on, the opportunity and need exist to reflect on past performance of the industry and set new directions for the Next Generation.

The need to focus heavily on profitability and sustainability issues facing the next generation is apparent and particularly pertinent, given the current financial challenges many rocklobster and other wild catch fisheries are facing around Australia.

Opportunities to build, manage and sustain profits exists through:

- Climate and energy
- Stock manipulation
- Market development
- Industry profitability and
- People, industry and business management.

The Congress is a unique whole-of-industry opportunity to canvass a new management approach with a major focus on profitability. The 'Next Generation' of young leaders will be heavily involved, as indeed, they are the group looking for a prosperous future worth pursuing as a career.

Need

The traditional approach to managing fisheries has been to focus on biology at the expense of sustainable industry profitability. This approach is failing numerous wild catch industries in Australia. Good luck rather than a commercial approach, sees the rocklobster industry remaining as one of the most valuable seafood industries in Australia. But

cracks are appearing with unexplained recruitment collapses, business failures and new environmental threats on the bow.

A revitalised management approach is needed if the lobster industry is to survive long term, and this must be about sustained profitability.

The Congress is one of the few opportunities for industry and stakeholders to step back and critically and positively assess the benefits and costs of conventional approaches and set the framework for managers, scientists and industry for a more profitable industry.

Objectives

- 1 Develop lobster industry approaches to managing for profit.
- 2 Update industry and stakeholders on opportunities and issues that impact profit.

Methods

The project was managed by the Southern Rocklobster Limited executive team with Roger Edwards as the project manager. The executive delivered all aspects of the Congress including all the necessary elements including planning, administration, communication financial management, marketing and delivery.

Additional specialist facilitation and event management resources were retained to supplement the team.

The team coordinated input from key stakeholders such as managers, researchers and the FRDC.

The key steps in the process were as follows:

Planning

- Establish task checklist for all activities through to implementation
- Establish industry executive steering group
- Develop Congress Program: topics, structure and time, speakers, facilitators and chairs
- Develop Young leader program in conjunction with FRDC
- Develop sponsorship format and targets

Implementation

- Assess venue options and select venue: site, seating, stage, meals & AV requirements and costs
- Assess and select accommodation options: Standard and budget options
- Distribute draft program and adjust following feedback
- Materials: Produce and distribute registration brochure, program & satchels
- Manage conference secretariat: manage registration database, confirmation and registration desk
- Finance: establish and manage the budget, banking and payments
- Managed the sponsor benefit program
- Event management: manage the Congress and Next Generation workshop over 3 days

- Reports: FRDC milestone, SRL Board, draft & final reports.

Communication

- Approach speakers and chairs by email and/or telephone
- Liaise with speakers arranging contents, travel & accommodation, and AV support needs
- Liaise with session chairs – as per speakers plus provide briefing and background materials
- Liaison with venue – location, room, social events AV etc
- Approach potential sponsors by letter
- Identification (2/State) young leaders working through State bodies for participation in “The Next Generation” workshop
- Work with industry organisations and stakeholders to program meetings around the Congress
- arrange advertising in state and national newsletters and national magazines e.g. FRDC news

Results and Discussion

Participants

The 6th National Rocklobster Congress attracted 160 participants over 3 days who participated in a range of activities including industry meetings, Next Generation workshop, Congress and social events. Participants attended from all lobster industries, New Zealand and Papua New Guinea.

Program

The program was structured with the Next Generation workshop held on the day immediately prior to the Congress.

The Next Generation workshop involved thirteen “young” participants preparing information about potential initiatives prior to the meeting. This involved data gathering and preparation of a presentation. At the meeting nine speakers presented a range of topics which stimulated discussion amongst the participants and set the scene for developing actions for the respective industries. These actions were distilled into presentations for the Congress.

Details of the Next Generation program can be seen in Appendix 3.

The objectives of the workshop were to:

1. Identify barriers to and opportunities for improved profits over time in the Australian lobster industry
2. Develop strategies to overcome the barriers and/or capture the opportunities
3. Identify the benefits and costs involved
4. Establish species priorities and action plan – what, when, who, how
5. Establish national industry priorities and action plan – what, when, who, how
6. Identify/discuss/highlight barriers to young people engaging in positions of industry leadership

A full report on the Next Generation workshop is presented in Appendix 4.

The Congress program involved four themes as follows:

1. National Lobster scene – round up of developments in each State
2. Climate and Energy – covering issues and opportunities
3. Managing for profit – covering economics, management and industry indicatives derived from the Next Generation workshop and
4. Marketing for Profit – covering markets, marketing and industry initiatives

Industry was exposed to thirty three presentations from national and international speakers. Full details of the Congress program can be found in Appendix 4 and presentations can be downloaded from www.cqlob.com.

Sponsorship and Trade Display

The Congress attracted thirteen sponsors and involved trade displays by four groups. The support from sponsors allowed for a financially viable event and also provided opportunity for information dissemination to the industry.

Social Program

The social program involved a meet and greet and Congress Dinner including National species "Taste Off". All events were well attended.

Outcomes – Next Generation Workshop

Discussion at the workshop occurred around what the national priorities might be. The following key issues were discussed and listed without priorities being assigned:

1. National Marketing Strategy including a marketing levy- all species
2. Peak body for commercial fishing linked through the chain
3. Establishing TACC's as limit not target
4. Resource sharing and fair methods for catch adjustments
5. Scientific reviews independent of State research providers
6. Understand environmental impacts
7. Pursuing co-management – enhanced working relationships with management
8. Licence fee costs
9. Industry education communication
10. Duplication of industry organisations

The report has been circulated to all States for information and follow-up.

Outcomes - Congress

The meeting concluded with Theme summaries, a review of Congress outcomes from the first 5 meetings and agreed actions. The discussions are summarised as follows:

1. **Climate and Energy**
 - A greater understanding of industry impacts and contribution to the problem is needed. It was agreed that MISA be approached to explore options for a partnership. In addition there should an assessment of the existing New Zealand measurement and management template.
 - Understanding consumer responses to industry approaches to dealing with climate change was seen as requiring further work.
 - Finally the need to develop practical industry strategies to mitigate impacts was identified.
2. **Managing for Profit**
 - The meeting supported ongoing research into more profitable management arrangements.
 - The absence of high quality economic data was seen as a major impediment to developing meaningful tools for assessing profitable strategies.
 - It was agreed that the South Australian economic data collection and analysis should expand to other States.

3. Marketing for Profits

- The need for a national approach to public profiling of the industry was identified.
- Debate was robust about the need for a marketing levy and it was agreed that a business case, with detail of how a levy would operate and be managed, is the appropriate next step.
- Finally it was agreed that an audit of existing seafood bodies should be undertaken to provide information about their roles and effectiveness. The purpose of the exercise would be to streamline operations, remove duplication and deliver more cost effective industry organisation.

The final resolution at handover, was for the next Congress to be held in New Zealand in August 2011, with the New Zealand Rock Lobster Association as host.

Follow Up Actions

A meeting of industry leaders and executives was convened immediately following the Congress to determine the next steps and responsibilities in terms of following up on the outcomes of the Congress. It was agreed that the Western Rocklobster Council would coordinate communication about the actions.

The proposed actions, timelines and organisations responsible are summarised as follows:

1. Climate and Energy	Action	Timeline	Who
A greater understanding of industry impacts and contribution to the problem is needed. It was agreed that MISA be approached to explore options for a partnership.	Meet with MISA in Adelaide.	June 2010	Southern Rocklobster Executive/MISA
In addition there should an assessment of the existing New Zealand measurement and management template.	Access and assess New Zealand template	December 2010	Western Rocklobster Council/NZRLIC
Understanding consumer responses to industry approaches to dealing with climate change was seen as requiring further work.	Industry Execs to develop approach for funding	December 2010	Western Rocklobster Council/Industry Execs
Finally the need to develop practical industry strategies to mitigate impacts was identified.	Industry Execs to develop approach for funding	December 2010	Southern Rocklobster Executive/MISA

2. Managing for Profit			
The meeting supported ongoing research into more profitable management arrangements.	Industry Execs to develop approach for funding	June 2011	Western Rocklobster Council/Industry Execs
The absence of high quality economic data was seen as a major impediment to developing meaningful tools for assessing profitable strategies. It was agreed that the South Australian economic data collection and analysis should expand to other States.	Industry Execs to develop approach at State level	June 2011	State bodies
3. Marketing for Profits			
The need for a national approach to public profiling of the industry was identified.	Industry Execs to develop approach for funding	June 2010	Western Rocklobster Council/Industry Execs Western Rocklobster Council
Debate was robust about the need for a marketing levy and it was agreed that a business case, with detail of how a levy would operate and be managed, is the appropriate next step.	SRL to develop via the CRC	June 2010	SRL
Finally it was agreed that an audit of existing seafood bodies should be undertaken to provide information about their roles and effectiveness. The purpose of the exercise would be to streamline operations, remove duplication and deliver more cost effective industry organisation.	Approach FRDC to undertake audit		Western Rocklobster Council
The final resolution at handover was for the next Congress to be held in New Zealand in August 2011, with the New Zealand Rock Lobster Association as host.	Host Congress 7. Link with State Execs and young leaders.	September 2011	New Zealand Rocklobster Council

Benefits

The primary beneficiaries from the Congress were:

1. rocklobster industry participants including PNG, Torres Strait traditional inhabitants & New Zealand;
2. other stakeholders including scientists, managers & policy makers;
3. industry suppliers & service providers; and
4. 13 young emerging leaders.

Benefits from the Congress are general and in the area of information exchange and capacity building.

The meeting contributed to maintaining and building on links and relationships between industry, managers and researchers and has set the scene for a range of new R&D initiatives. These are in the area of climate change, management economic assessments and a marketing levy.

The commitment to continue with the concept in New Zealand is also encouraging and the pool of talent identified in the Next Generation workshop offers potential for new effective leadership for the industry.

The Congress outcomes reflect the ongoing commitment of the national industry to work towards a strategic and coordinated approach to national lobster industry development.

Further Development

There has been limited feedback on the further development of the Congress concept. Importantly there was strong support to continue with the meeting and in particular the response to incorporating young leader development was very positive. It is suggested that FRDC continue to support the Congress and Next Generation concepts.

Feedback on the program content was positive with one exception namely in the area of economics. It was felt that while important, the amount of time devoted to economics could be reduced.

The New Zealand meeting presents as a unique opportunity for the normal funding devoted to sponsorship being used for additional support for the Next Generation program. This should be explored by the industry.

Industry executives has committed to progressing the outcomes of the Congress.

Planned Outcomes

The Planned Outcomes for the Congress were to:

1. Kick-start a national whole-of-fishing-industry debate about managing for profit.
2. Maintain and further develop the rocklobster industry national network.
3. Build on the start made in Cairns 07 to involve the PNG nationals and traditional inhabitants of the Torres Strait in the wider lobster industry network.
4. Contribute to the development of up to 15 emerging young industry leaders.
5. Update industry and stakeholders on national initiatives.

All the planned outcomes were achieved.

Conclusion

The Congress again has demonstrated a useful place in the wider lobster industry as the key national information exchange and strategy development platform. This is evidenced by the level and quality of participation by the national industry, high level representation by all States, New Zealand and Papua New Guinea.

There was clear commitment to progress, several important initiatives in the areas of climate change, economics and marketing. The new dimension of using the Congress as a young leader development tool was well received.

In terms of overall performance of the event the following provide some guidance:

1. Meeting milestones – achieved.
2. Numbers attending Next Generation workshop – 13 young leaders
3. Numbers attending the conference – in excess of 150.
4. Speakers – Congress 26, Next Generation workshop 8 plus presenters.
5. Skilled facilitator appointed – Catherine Barnett
6. Number of industry and stakeholder participants confirmed – in excess of 100 attended formal Congress sessions.
7. Level of successful sponsorship acquisitions to meet budget – achieved \$37,500 (ex FRDC).
8. Breakeven financial result – achieved.

It can be concluded that the event was successful both financially and in terms of meeting the objectives.

References

Nil

Appendix 1 – Intellectual Property

Nil

Appendix 2 – Staff

Roger Edwards
Kate Dermody
Alison Wallis
Tria Goode
Catherine Barnett
Carolyn Anderson

Appendix 3 – Next Generation Workshop Program



**Next Generation Workshop
Monday 14th September 2009
Oaks Plaza Pier Hotel**

**Team: Catherine Barnett (facilitator)
Assistants: Carolyn Anderson and Neil Garbutt FRDC**

Workshop Objectives (by species):

1. Identify barriers to and opportunities for improved profits over time in the Australian lobster industry
2. Develop strategies to overcome the barriers and/or capture the opportunities
3. Identify the benefits and costs involved
4. Establish species priorities and action plan – what, when, who, how
5. Establish national industry priorities and action plan – what, when, who, how
6. Identify/discuss/highlight barriers to young people engaging in positions of industry leadership

Expectations of You as a participant:

1. **Pre-workshop** – research (telephone discussion) with respective fishery managers and/or researchers and industry leaders, opportunities for improved profits and associated issues.
2. **Pre-workshop** – prepare a 3 minute presentation (1 PowerPoint slide) on the 5 highest priority opportunities **for improved profits including benefits and costs in your industry, and submit at least 1 week prior to the Workshop.**
NOTE: A slide template will be sent to you to use. Please advise if you do not have PowerPoint.

3. **Workshop** – present slide
4. **Workshop** – participate in groups discussions
5. **Congress** – 4 participants to present workshop outcomes
6. **Congress** – leaders to undertake a hosting role involving greeting speakers, special guests and/or leaders.
7. **Post-Congress** – review workshop report and comment.
8. **Future** – emerge as a leader!

Workshop program

Pre-workshop Activities for Participants

1. Research profitability barriers/opportunities with industry leaders, managers, finance sector and researchers.
2. Prepare a (3 min) slide PowerPoint presentation of the research outcomes for the workshop including 5 priority areas with the basis of the priority.

Workshop Program

Time	Midday – meet & a greet working lunch	Person
Midday	Lunch & Introductions	Catherine Barnett
	Overview of workshop program	Catherine Barnett
Session 1	Background - Snaps Shots	Presenter
12.30pm	<ul style="list-style-type: none"> • Flexible management 	Kelly Crosthwaite
12.40pm	<ul style="list-style-type: none"> • Future harvest 	Caleb Gardner
12.50pm	<ul style="list-style-type: none"> • Propagation 	Caleb Gardner
1pm	<ul style="list-style-type: none"> • Banking & finance 	Westpac Rep
1.10pm	<ul style="list-style-type: none"> • Markets 	Matt Muggleton
1.20pm	<ul style="list-style-type: none"> • Fishing costs 	Roger Edwards
1.30pm	<ul style="list-style-type: none"> • People development 	Neil Garbutt
1.40pm	<ul style="list-style-type: none"> • Industry structure & strategy 	Daryl Sykes
1.50pm	<ul style="list-style-type: none"> • Summary & debate 	Catherine Barnett

Session 2: 2pm -3pm	Individual Presentations & debate	All
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3pm	Coffee	
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Session 3: 3.15pm – 4pm	Species groups Workshop	All with assistants
	<ul style="list-style-type: none"> • Establish Issues/Opportunities 	
	<ul style="list-style-type: none"> • Establish benefits and costs of each area 	
	<ul style="list-style-type: none"> • Establish priorities. 	
	<ul style="list-style-type: none"> • Establish action plan 	

Session 4: 4pm-5pm	<ul style="list-style-type: none"> • Present Species Priorities 	Group leader
	<ul style="list-style-type: none"> • Distil National Priorities 	All
	<ul style="list-style-type: none"> • Summarise 	Barnett
5.pm – 5.10pm	<ul style="list-style-type: none"> • ARILP and PDS Scholarship Brief • Leadership Issues 	J Ruscoe
5.10pm- close	Congress presenters prepare presentations – 3 species and national outcomes	Presenters/Assistants

Outputs

15 min presentation – “If I owned the Southern Rocklobster Fishery” Congress presenter - Clive Perryman

15 min presentation – “If I owned the Western Rocklobster Fishery” Congress presenter - James Paratore

15 min presentation – “If I owned the Northern Rocklobster Fishery” Congress presenter - Philip Polon

15 min presentation – “Summary Outcomes National Priorities” Congress Presenter - Joel Redman

Appendix 4 – Next Generation Report



Next Generation Workshop
Monday 14th September 2009
Report

Prepared by:
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Introduction

The 6th National Rock Lobster Congress was held from 15th – 16th September 2009. A Young Leaders workshop was held the afternoon before the congress. FRDC provided funding towards the event in the form of subsidising the congress fee for young leaders nominated by their state associations. FRDC also provided funding for the session to be facilitated by Catherine Barnett of Barnett Communications & Marketing.

Following is the program and summary. Group findings are presented in Appendix 1. Four young leaders were selected to present to the main congress and their presentations are included in Appendix 2.

'Learnings'

The following comments are observations of the facilitator:

- The workshop was well attended, although there were a small number who pulled out at the last minute
- The program was punchy, although some of the speakers had prepared too much material for the 10 minutes they were allocated
- A group of 15-20 is ideal
- Working in species groups is good and it was particularly good to break the Tasmanian and South Australian delegates up as they didn't all know each other, but they could work together on their 'species' issues
- Some common themes emerged both at a species level and national level which indicated that some of the fundamental issues are the same throughout Australia
- Breaking up the sessions into presentations and group work kept the attendees' attention
- Most attendees did not prepare their presentations in advance as requested and as it turned out, there were time constraints that did not allow them to all present. This did not matter as in effect the group work was very similar to the individual presentations and would have been a duplication of the work.



**Next Generation Workshop
Monday 14th September 2009
Oaks Plaza Pier Hotel**

Facilitator: Catherine Barnett

Assistants: Carolyn Anderson and Neil Garbutt FRDC.

Speakers: Kelly Crosthwaite, Caleb Gardner, Andrew Tarrant (Westpac), Matt Muggleton, Roger Edwards, Neil Garbutt (FRDC), Daryl Sykes (NZ).

Participants:

No.	Name	Surname	Nom. Body
1	Joel	Redman	SARLAC
2	Scott	Walden	SARLAC
3	Kate	Ferguson	SARLAC
4	James	Paratore	WRLC
5	Jason	Barrett	WRLC
6	Clive	Perryman	TRLFA
7	Andrew	Smith	TRLFA
8	Stuart	Atkins	TRLFA
9	Terry	Shea	TRLFA
10	Paul	Jordan	TRLFA
11	Brendon	Taylor	TRLFA
12	Mark	Cranstone	NSW
13	Justin	Phillips	SARLAC

Workshop Objectives (by species):

1. Identify barriers to and opportunities for improved profits over time in the Australian lobster industry
2. Develop strategies to overcome the barriers and/or capture the opportunities
3. Identify the benefits and costs involved
4. Establish species priorities and action plan – what, when, who, how
5. Establish national industry priorities and action plan – what, when, who, how
6. Identify/discuss/highlight barriers to young people engaging in positions of industry leadership

Work program

Pre-workshop Activities: Participants were asked to research profitability barriers/opportunities with industry leaders, managers, finance sector and researchers and prepare a (3 min) slide PowerPoint presentation of the research outcomes for the workshop including 5 priority areas with the basis of the priority. The template below was provided to each participant.

Your Opportunity/Ideas – please fill in	Benefits	Costs
1. (Example) Higher Price	Higher income Eg 4000t Sth lobster @ \$5/kg = \$20m	Eg Marketing levy \$1/kg for 4,000 tonnes = \$4m
2.		
3.		
4.		
5.		

Program

Time	Midday – meet & a greet working lunch	Person
Midday	Lunch & Introductions	Catherine Barnett
	Overview of workshop program	Catherine Barnett
<u>Session 1</u>	<u>Background - Snaps Shots</u>	<u>Presenter</u>
12.30pm	<ul style="list-style-type: none"> • Flexible management 	Kelly Crosthwaite – PIRSA
12.40pm	<ul style="list-style-type: none"> • Future harvest 	Caleb Gardner – TAFI
12.50pm	<ul style="list-style-type: none"> • Propagation 	Caleb Gardner – TAFI
1pm	<ul style="list-style-type: none"> • Banking & finance 	Andrew Tarrant, State Manager, Cash Flow Solutions Group Westpac Rep
1.10pm	<ul style="list-style-type: none"> • Markets 	Matt Muggleton – SRL
1.20pm	<ul style="list-style-type: none"> • Fishing costs 	Roger Edwards – SRL
1.30pm	<ul style="list-style-type: none"> • People development 	Neil Garbutt – FRDC
1.40pm	<ul style="list-style-type: none"> • Industry structure & strategy 	Daryl Sykes – NZRLC
1.50pm	<ul style="list-style-type: none"> • Summary & debate 	Catherine Barnett - SARLAC

<u>Session 2:</u> 2pm - 3pm	Individual Presentations 3 mins max & debate	All
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A number of participants provided presentations. Due to time constraints it was decided that ones that weren't actually discussed in the whole group would be incorporated into the group discussions.

3pm	Coffee	
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<u>Session 3:</u> 3.15pm – 4pm	Species groups Workshop	All with assistants
	<ul style="list-style-type: none"> • Establish Issues/Opportunities 	
	<ul style="list-style-type: none"> • Establish benefits and costs of each area 	
	<ul style="list-style-type: none"> • Establish priorities. 	
	<ul style="list-style-type: none"> • Establish action plan 	

Session 4: 4pm-5pm	<ul style="list-style-type: none"> • Present Species Priorities 	Group leader
	<ul style="list-style-type: none"> • Distil National Priorities 	All
	<ul style="list-style-type: none"> • Summarise 	Catherine Barnett
5.pm – 5.10pm	<ul style="list-style-type: none"> • ARILP and PDS Scholarship Brief • Leadership Issues 	Neil Garbutt
5.10pm- close	Congress presenters prepare presentations – 3 species and national outcomes	Presenters/Assistants

Summary

Summary of key issues from group presentations

- Profit
- Limitations on increasing profit
- Implementing flexible management
- Stock rebuilding
- Industry profile / risk
- Youth
- Sustainable stocks / price
- Community / social impacts
- Lobster – markets
- Icon
- Peak body – links
- New entrants / succession

Summary of national priorities

Discussion occurred around what the national priorities might be. The following issues were discussed:

- National Marketing Strategy - all species
- Peak body for commercial fishing, link in chain
- TACC – limit not target (Can't manage recruitment failures)
- Effort – reward
- Custodial rights. Catch adjustments
- Scientific reviews
- Understand environmental impacts
- Shortcomings in current programs
- Pursuing co-management. Greater working relationships
- Maximum profit
- LEVY
 - licence fees
 - independent of government
 - education/communication/leadership/face to face
 - seafood industry alliance: fuel, tax, marine parks

- SEA
- duplication (avoid)

Outputs

Four of the Young Leaders were charged with the responsibility of presenting to the conference participants on individual fisheries. Please refer to Appendix 2 for a copy of their presentations.

15 min presentation – “If I owned the Southern Rocklobster Fishery” Congress presenter - Clive Perryman

15 min presentation – “If I owned the Western Rocklobster Fishery” Congress presenter - James Paratore

15 min presentation – “If I owned the Eastern Rocklobster Fishery” Congress presenter – Mark Cranstone

15 min presentation – “Summary Outcomes National Priorities” Congress Presenter - Joel Redman

Appendix 1 - Group Findings

Five groups were established. They were asked to:

- 1 Establish Issues/Opportunities
- 2 Establish benefits and costs of each
- 3 Establish priorities (rank them)
- 4 Establish action plan (including timing and who)

The groups consisted of:

Group 1

- Joel Redman, Terry Shea, Paul Jordan

Group 2

- Kate Ferguson, Clive Perryman, Brendon Taylor

Group 3

- Scott Walden, Stuart Atkins, Andrew Smith, Justin Phillips

Group 4

- James Paratore, Jason Barrett

Group 5

- Mark Cranstone, Daryl Sykes, Roger Edwards

1 Establish Issues/Opportunities

Group 1

- Increase profitability over time
- Utilise/alter management to enhance security and flexibility (co management)
- Access security to assist business certainty
- Reduction of costs through efficiency gain by product opportunity

Group 2

- Smarter fishing: running costs

- Marketing. Fish when the price
- PR promotion – domestic awareness. Market lobsters \$ per ea to general public, eg \$12 lobster. Market to chefs \$ per plate. Market to govt – lobby

Group 3

- Scientific data – needs more input from hands on fishermen
- Stock sustainability – flexible management through TAC. Must be financially and viable for stocks
- Fixed elements – boats, wages, gear, bait, fuel
- Variable elements – stock levels (sustainability), science and management
- Price/markets
- Concentrate on influencing the variable element of your fishery

Group 4

- National Peak Body
- National Marketing Body
- Use of Idol Capital / Idol Workers (Developing alternate sources of income)
- Increased Security - Unit Register / Property Rights - Greater certainty
- Set Goals NOT Thresholds
- Flexibility & Adaptability as applied to Management and Fishing Practices
- Less reliance on recruitment, stock rotation or "harvest" principle
- Strategies to promote "Custodians of the Ocean" - PR campaign
- Switch from Volume driven Processing Sector to Quality driven Processing Sector - More Processors, smaller, more efficient processors, vertically integrated processors
- Catch Rates (We can change) + Fixed Costs (Fixed) + Variable Costs (We can change some) + Beach Price (We can change)
- Catch Rates -->> Increase our catch rates by stock re-building etc
- Beach Price -->> Increase our beach price via marketing initiatives etc
- Public Perception of industry needs to change - Community involvement etc
- Involve Tourism Sector / national and international awareness campaigns

Group 5

- Boutique and unique fishery
- Potential to grow volume
- Relatively small number of participants
- Good relationship with scientists
- Stock abundance improving
- Fishery performance routinely monitored

- Industry compliance high
- Product traceability very low to consumers
- Small fishery – high management cost
- Cost of EIS and EPBC
- MPA policy
- Illegal fishing – unmanaged rec fishing
- Relationship not so good with managers
- Industry organization and representation inconsistent/reliant on a few
- Access sharing – method overlaps, theft of trap
- Administrative obstacles to trade and exchange of quotas

2 Establish benefits and costs of each

Group 1

- Increase profits
- Decrease loss
- Increase beach price
- Increase awareness, increase markets/market share and use domestically of lobster (retail and food service markets)

Group 2

- Benefit – self explanatory
- Cost – industry promotion costs – levy
- Market diversification - \$\$
- Need to manage to raise CPUE to offset cost – management changes needed
- Cost needs to be shared with processing sector to offset and encourage market development
- Co management – when fully realized can assist the fishery to easier realize potential social/economic benefit by ensuring industry/govt are focused on 'common' outcomes and goals

Group 3

- Varying fixed elements – minor benefits
- Varying variable elements – major benefits/returns

Group 4

- BENEFITS = BETTER BEACH PRICE / INCREASE IN CATCH RATES / REDUCED COST = \$\$\$
- COSTS = COSTS OF CHANGE, TRANSITIONAL COSTS AND THE WILLINGNESS TO CHANGE
- NB; * Some ideas require further canvassing, feasibility studies etc etc *
- NB; * Time taken to change and "lag" effect is also a problem *

Group 5

- Industry organization \$50k per season
- Quota registry \$5k per season
- Align lobster supply with market demand
- Industry generated data – logbooks
- Better spatial understanding
- More data on size of spawning stock biomass – minimal \$ \$7k per season

3 Establish priorities (rank them)*Group 1*

- Smarter fishing
- Working with buyer (better relationship)
- Face of lobster (national body)

Group 2

- Increased profitability
- Sustainable stock levels
- Not to rely on one market, spread risks
- Ensure efficiency gains are realized through above point to cut or maintain cost at existing level.

Group 3

- Variable elements – stock, price/markets

Group 4

- *(With respect to Processing, Marketing, Research, Management & The Future)*
- 1). Processing - Shift from volume driven to quality driven; Value-add, Vertically integrate, Efficiency
- 2). Marketing - Chicken path Versus Diamond Path - Follow the Success stories, Marketing levy?, Promotion of Health Benefits of Lobster
- 3). Research - Inclusive research with grassroots fishermen, "real-time" observations, DNA studies and oceanographic studies into the first year of a lobsters life
- 4). Management - Establish principles of Co-Management and define responsibilities, goals and not just "thresholds", reward good management, flexible management options
- 5). The Future - Harvest ocean (not hunt), rotate harvest areas, artificial habitats, optimal yield per recruit, "Agritourism"

Group 5

- Reduce management costs, remove community contribution levy

- Industry organization and representation – start with a virtual association using electronic technology
- Establish the legitimacy of the eastern lobster industry – history, culture, social
- Develop and implement management procedure supported by routine stock monitoring
- Capitalise on traceability – better control of product into markets

4 Establish action plan

Group 1

- Now – Fishermen/buyers
- Peak times – Fishermen/buyers
- Low times – Fishermen/buyers

Group 2

- Work with govt agency to ensure appropriate goals and time lines are put in place. To achieve goals, now and ongoing – industry, DPI and TAFI

Group 3

Ideas:

- regular independent peer reviews of science/research and management programs, species level

Who:

- National representative body (eg SRL)

What:

- Explore alternative markets – premium price, influencing S + D in current markets, spreads risk, eg SARS
- Value add product, new product forms, target low value portion of catch

How:

- \$ levies, funding (govt and/or industry)
- Model/vehicle – create new, go with existing export market chains

Group 4

- 1). National Peak Body - Co-ordinate national strategy (PR, political, lobbyists etc) and work together, streamline peak bodies and join together on common ground (MPAs, Marketing, ETS etc)
- 2). Co-Management - Inclusive Research & Management - "Custodians of the Ocean" Principle
- 3). National Marketing Body - Feasibility Study, Generic "Australian Rock-Lobster", Marketing Levy?
- 4). Identify Barriers and limitations to future entry into the Fishing Industry - Develop separate action plan to address these issues

- 5). Switch Management (following the "rebuild" phase) to Mariculture Principles - Harvest the Ocean

Group 5

- Use Lobmac as the platform to consolidate industry representation
- Investigate and implement funding base for Eastern Lobster Association
- Identify industry promotional opportunities – Eastern RL and Sydney Fish Market??
- Timing – commence 30 September at Lobmac

Appendix 5 – Congress Program

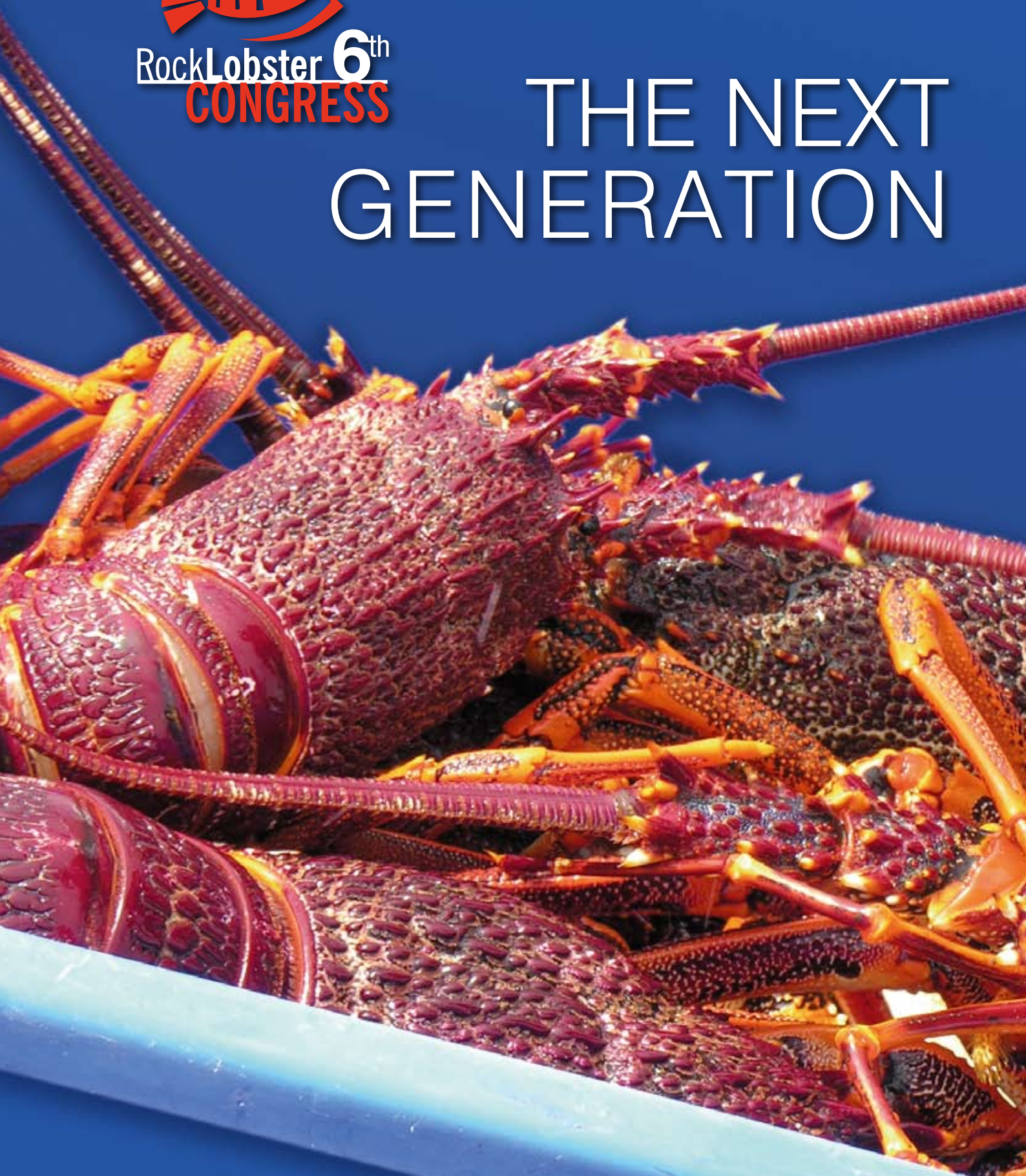
6th National Lobster Congress

15 – 16 September 2009

Adelaide, South Australia



THE NEXT GENERATION



Fisheries Research and Development Corporation

Supporting the Australian
Rocklobster Industry



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WELCOME

The South Australian Rock Lobster Advisory Council (SARLAC) in partnership with the Fisheries Research and Development Corporation (FRDC) warmly welcomes you to the 6th National Lobster Congress in Adelaide, South Australia on the 15th and 16th September.

The Congress will focus heavily on profitability issues facing the next generation. This is particularly pertinent with the current financial challenges many rocklobster and other wild catch fisheries are facing around Australia. The Congress is preceded on Monday 14th September with the Future Leaders Forum as well as other industry meetings. The 'Meet & Greet' will be held on Monday evening, where you will have the opportunity to catch up with colleagues and members of the wider industry, both old and new acquaintances.

Speaker sessions will run throughout Tuesday 15th and Wednesday 16th September with the national species of the year taste off and Congress dinner to be held on Tuesday 15th September. We are delighted to have Andre Ursini of Masterchef fame, Ann Oliver renowned Adelaide chef and Dr Patrick Hone FRDC CEO as the judging panel.

The Congress program will cover opportunities to build and sustain profits exists through:

- Climate and energy
- Stock manipulation
- Market development
- Industry profitability and
- People, industry and business management.

The traditional approach to managing fisheries has been a focus on sustainable stocks as opposed to sustainable industry profitability. While the rocklobster industry remains one of the most valuable seafood industries in Australia, we are seeing unexplained recruitment changes, business failures and new environmental issues on the horizon.

The Congress is set to provide a unique opportunity to canvass a new management approach with a major focus on profitability. The 'next generation' of young leaders will be heavily involved as indeed they are the group looking for a prosperous future worth pursuing as a career.

Congress 6 is set to be a watershed meeting aimed at assessing the benefits and costs of conventional approaches and setting a new direction for managers, scientists and industry aimed at a more profitable industry.

Thank you for your participation and support. I look forward to spending a couple of productive, progressive days with you and I hope you enjoy your time in Adelaide.



Catherine Barnett

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2 PROGRAM

MONDAY 14TH SEPTEMBER

4.00pm - 6.30pm	Registration desk opens	Oaks Plaza Pier Hotel
6.30pm - 8.00pm	Meet and Greet	Sol Bar

TUESDAY 15TH SEPTEMBER

MORNING

TIME	THEME: Congress Opening	SPEAKER
8:00am	Registration desk opens	
9.00am	Welcome & Housekeeping	Ms Catherine Barnett, Independent Chair, South Australian Rock Lobster Advisory Council
9.05am	Official Opening	Hon Paul Caica, Minister for Agriculture, Food and Fisheries
9.10am	Major Sponsor (FRDC) address	Dr Patrick Hone, Executive Director FRDC
TIME	THEME: National Lobster Scene Major Sponsor: FRDC	CHAIR: Ms Catherine Barnett, SARLAC
9.20am	Tasmania	Rodney Treloggen, TRLFA
9.30am	Western Australia	Dexter Davies, WRLC
9.40am	South Australia	Justin Phillips, SARLAC
9.50am	Victoria	David Johnston, VRLA
10.00am	New South Wales	Scott Westley, NSW
10.10am	Torres Strait	Philip Polon, PNG
10.20am	New Zealand	Daryl Sykes, New Zealand
10.30am	Break - coffee	
TIME	THEME: Climate & Energy Sponsor: SARDI/PIRSA MISA	CHAIR: Mehdi Doroudi PIRSA Executive Director
11.00am	MISA Overview	Stephen Madigan, MISA
11.10am	Climate Change – Tasmanian Lobster Industry Vulnerability Report	Dr Gretta Pecl, Tasmanian Aquaculture & Fisheries Institute, University of Tasmania
11.30am	Carbon Footprints and lobster industry offsets	Dr Gary Morgan
11.50am	Climate Change - Industry Action	Owen Cameron
12.10pm	Alternative Fuel Sources	Dr Andrew Winzer, Western Rock Lobster Council
12.30pm	Panel – all speakers	
12.45pm	Lunch	

AFTERNOON

TIME	THEME: Managing For Profit - Future Harvest Sponsor: Seafood CRC	CHAIR: Len Stephens Managing Director Seafood CRC
1.15pm	The Development Challenge: Industry Profit – where are we now, what is possible and what are the tradeoffs?	Ewan Colquhoun, Ridge Partners
1.35pm	Managing For Profit – Northern Prawn Fishery case study	Sean Pascoe, CSIRO
1.55pm	Management System Performance Review – Price, costs, license values: Quota & Input Controls	Dr Julian Morrison, EconSearch
2.15pm	Innovative Approaches - CRA8 & CRA5 New Zealand	Larncé Wichman, Executive Officer for the CRA 5 Rock Lobster Industry Association Inc. Malcolm Lawson, Chief Executive of the CRA 8 Management Committee Inc.
2.45pm	Future Harvest - lobster management for profit	Dr Caleb Gardner, Tasmanian Aquaculture & Fisheries Institute, University of Tasmania

3.15pm	Break - coffee	
TIME	THEME: Managing for Profit – Industry Direction Sponsor: Western Rock Lobster Council	CHAIR: Rodney Treloggen, Tasmanian Rock Lobster Fisherman’s Association
3.45pm	If I owned the Southern Rocklobster Fishery	Clive Perryman, TRLFA
4.00pm	If I owned the Western Rocklobster Fishery	James Paratore, WRLC
4.15pm	If I owned the Northern Rocklobster Fishery	Philip Polon, PNG
4.30pm	Young Leaders Workshop - “Plan For Profit”	Joel Redman, SARLAC
4.45pm	Open Forum – all speakers	
5.15pm	Close Day 1	
6.30pm	National Species Taste Off	Host: Catherine Barnett, SARLAC
7.30pm	Congress Dinner	Speaker: Senator Nigel Scullion

WEDNESDAY 16TH SEPTEMBER MORNING

TIME	THEME: Marketing for Profit Sponsor: Westpac	CHAIR: Wayne Hosking, Geraldton Fishermen’s Co-op
8.55am	Housekeeping	Catherine Barnett, SARLAC
9.00am	Keynote address – The Meat Marketing Challenge	Tim Kelf, Meat & Livestock Australia
9.25am	Keynote address – The Lobster Marketing Challenge	Dr Len Stephens, Seafood CRC
9.50am	China Free Trade Negotiations – DAFF Update	John Michell, Department of Foreign Affairs and Trade
10.00am	Break - coffee	
TIME	THEME: Marketing for Profit Sponsor: Seafood CRC	CHAIR: Will Zacharin, PIRSA
10.30am	Free Trade with China – Implications for Industry Strategy	Yuling Zhang, Senior Business Development Manager Austrade Guangzhou
10.50am	From Plate to Pot: Demand Chain Management for the Western Rock Lobster	Wayne Hosking, CEO, Geraldton Fishermen’s Cooperative
11.10am	Improving Price – Changing Southern Rocklobster Demand - USA “Seafood Basket”	Matt Muggleton, Southern Rocklobster Ltd
11.30am	CRAYPEC – The Need for a National Product and Market Development Program	Greg Hart, Wild Oceans Pty Ltd
12.00pm	Lobster Marketing Levy - \$1/kg	Angus Callander, Director of Seafood Experience Australia
12.10pm	Panel Questions	
12.30pm	Lunch	

AFTERNOON

TIME	THEME: Threads & Next Steps Major Sponsor: FRDC	CHAIR: Ms Catherine Barnett, SARLAC
1.30pm	Climate and Energy - summary	Mehdi Deroudi, PIRSA
1.45pm	Managing For Profit - summary	Dr Caleb Gardner, TAFI
2.00pm	Marketing For Profit - summary	Wayne Hosking, GFC
2.15pm	Congress Outcomes - 10 year review of progress	Justin Phillips, SARLAC
2.30pm	Congress 6 Outcomes & handover NSW	Catherine Barnett, SARLAC
2.45pm	Congress Close	



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Primary Industries and Resources SA



Both the commercial and the recreational fishing industry rely on a healthy, well-managed fisheries resource. PIRSA Fisheries acts as the caretaker of the fishing resource in South Australia.

The role of the division is to ensure:

- maximum economic gain from the resource
- that the resource is shared equitably amongst all user groups (including recreational and commercial fishers)
- the long-term sustainability of the commercial and recreational fishing industries whilst protecting biological diversity and maintaining essential ecological processes and life-support systems.

PIRSA Fisheries is responsible for:

- fisheries management and planning
- licensing and permits
- services to ensure compliance with legislation for recreational fishers and the commercial fishing industry
- providing information and advice for anyone with an interest in fishing and our fisheries resource.

Anyone can report illegal fishing activity through the 24 hour FISHWATCH number on 1800 065 522. Callers can choose to remain anonymous.



SARDI Aquatic Sciences

The science behind Australia's southern rock lobster industry.



From nauplius to phyllosoma to puerulus to adult, SARDI scientists know *Jasus edwardsii* inside out.

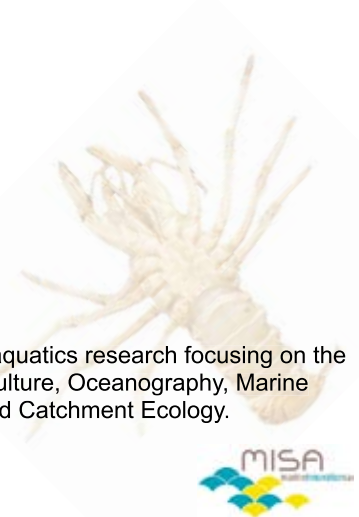
Providing annual stock assessments and specialist research for the South Australian resource for more than a decade, SARDI Aquatic Sciences is helping the southern rock lobster industry grow in an ecologically sustainable way.

Research activities include:

- annual puerulus monitoring
- voluntary catch sampling
- fishery independent surveys
- development of management plans for northern and southern rock lobster fisheries
- lobster population modelling
- translocation research
- movement patterns
- seafood value-adding

SARDI Aquatic Sciences is a national leader in aquatics research focusing on the science program areas of Wild Fisheries, Aquaculture, Oceanography, Marine Environment and Ecology, and Inland Waters and Catchment Ecology.

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Visit www.seafoodcrc.com or call us on **1300 732 213** and talk to one of our staff today.



"The Future of Fishermen"

The Western Rock Lobster Council is a not-for-profit organization whose Board represents all Managed Fishery License Holders in the industry. The Council Board is made up of 12 elected members, 6 from C Zone, 3 from B Zone and 3 from A Zone. These members are elected by the MFL holders from each Zone. WRLC's objective is to achieve a sustainable, profitable Western Rock Lobster Industry by working with all industry stakeholders including Professional Fishermen's Associations.

We work on your behalf to -

- Ensure biological, economic and social sustainability of the industry
- Negotiate with Government and stakeholder groups
- Improve the profitability and viability of the industry through projects to help your fishery
- Promote the industry as responsible, sustainable and accountable

We encourage you to contact your local Professional Fisherman's Association, join up as a member and work together with us on matters affecting the whole of the industry for a positive, successful future... the future of fishermen.

Contact the Western Rock Lobster Council:
PO Box 55 Mt Hawthorn WA 6918
Telephone (0 8) 9340 5001
Email: vickyk@wrlc.com.au
Visit the website: www.rocklobsterwa.com
Or drop in to Kyria House, Level 1
401 Scarborough Beach Road, Osborne Park.

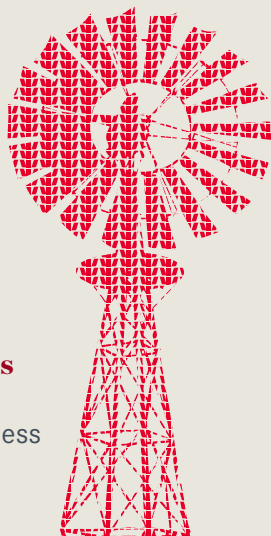
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NATIONAL SPECIES TASTE OFF

TUESDAY 16TH AT 6:30PM



MARTINI | RISTORANTE

Guest Judge - Andre Ursini

Andre Ursini left a project management business he established with his brother-in-law and his new girlfriend of just two months to audition, along with 7,500 other amateur chefs, for the hugely successful Masterchef television show.

His experimental approach to cooking, aggressive positive energy and passion for Italian food made him a favourite with the judges and took him to the start of the last week in the competition. However it was his focus on Italian cuisine and having never cooked a curry that eventually led to his elimination in a 'penalty shoot out' taste test of a Sri Lankan curry.

With his hunger to be seriously involved in the hospitality industry intensified through his involvement with Masterchef he was happy to cheer on fellow South Australian Poh in the grand final of the show which created a ratings record for a regular television show, with 3.72 million viewers.

It looks like Andre's dream of becoming a restaurateur is closer than ever as since the show he has been offered a job from internationally renowned chef Emmanuel Stroobant of Saint Pierre in Singapore, had Gordon Ramsay talking about him on radio and is now training at Italian restaurant, Martini Ristorante in Norwood, South Australia.

CONGRESS VENUE

Oaks Plaza Pier Hotel

16 Holdfast Promenade

Glenelg, SA 5045

Phone: 08 8350 6688

1300 551 111

Facsimile: 08 8350 6699

CONTACT

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