

**CRC Project 2008/907  
Seafood CRC participation in the  
Seafood Access Forum**

**Ted Loveday**

**Project No. 2008/907**



**AUSTRALIAN  
SEAFOOD  
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**Australian Government**

**Fisheries Research and  
Development Corporation**



An Australian Government Initiative



# Non-Technical Summary

## 2008/907: Seafood CRC participation in the Seafood Access Forum

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### PROJECT OBJECTIVES:

To assist the Seafood CRC in meeting its projected growth targets of doubling the value of the Australian seafood industry to \$4billion per annum and to generate more than 2,800 jobs in rural and regional areas by 2017 by significantly enhancing opportunities for trade through improved access to international markets (See Item 1.2 for more details).

### OUTCOMES ACHIEVED

The SAF have directly and indirectly resulted in:

- a. SAF & SAF Executive: Systematically and persistently address trade and market access issues for Australian seafood through a rigorous and inclusive industry and government partnership & process;
- b. Ensuring that opportunities for Australian seafood market access are thoroughly investigated and presented in negotiations on free trade agreements (FTAs), and multilateral trade agreements under the auspices of the World Trade Organisation;
- c. Supporting Australia's Trade Negotiators: Informed submissions on seafood trade priorities in multi – lateral and bi-lateral trade negotiations;
- d. Identifying and gaining a presence in new international markets for Australian seafood products – including markets for new and innovative product forms.
- e. Facilitating constructive industry and government dialogue to ensure that trade and market access policies and regulations do not compromise seafood industry competitiveness.
- f. Monitoring and having appropriate input into international processes and agendas (e.g. Codex committees) relevant to seafood trade and agree on actions that will ensure that international standards are set on the basis of sound science and not used as trade barriers;
- g. Identifying and pursuing opportunities to achieve international recognition that the Australian seafood industry is a global leader in sustainable development and sound environmental practices.

### LIST OF OUTPUTS PRODUCED

### ACKNOWLEDGEMENTS:

- **Work that enhanced the findings of project from key stakeholders: (including SAF Executive members and advisers)**

# Body of Report

## 1. Introduction and Background

The goal of the Seafood CRC is to double the value of the Australian seafood industry to \$4billion per annum by 2017 and to generate more than 2,800 jobs in rural and regional areas. Achieving this goal will require a concerted effort by the Seafood CRC, its core participants and collaborators over the life of the program - this includes SSA, NAC and SEA. In its favour, the Seafood CRC represents almost 80 percent of the Australian seafood industry's GVP of just over \$2 billion per annum. This is enhanced further with the high level of scientific institution and through chain representation its investment strategy has attracted.

The Seafood CRC represents the first time in the history of the Australian seafood industry that such a high level cooperative partnership has been achieved for the purpose of advancing the industry's future prosperity. The Seafood CRC, brings together the critical combination of scientific expertise and industry knowledge with the capacity to address the full breadth of trade and market access issues that have previously constrained the industry from meeting its full market potential.

From a trade and market access perspective, the Seafood CRC represents a significant proportion of the 70 percent of Australian seafood consigned to international markets. This includes high value seafood products such as Rocklobster, Abalone, Prawns, Oysters and high quality finfish. Given the Australian seafood industry's heavy reliance on international markets for its products, there would seem little point investing heavily in production and through chain innovation if trade and market access issues remain unaddressed.

Free and fair trade and market access for seafood is essential for the future well being of Australia's multi-billion dollar seafood industry and its significant contribution to the national and regional economies. Achieving higher financial returns for Australian products in international markets will also be critical in achieving the Seafood CRC's growth targets, especially when one considers there are some limitations on production growth from both wild harvest and aquaculture sectors. Also, any growth achieved in product prices on international markets will flow on to growth in domestic market product prices. However, achieving free and fair trade access for seafood has become an increasingly elusive goal. Trade impediments for seafood are emerging on an increasingly regular basis and costing Australian seafood businesses millions of dollars through lost trade.

In responding to these challenges, the Australian Seafood Access Forum (SAF) was established by Seafood Services Australia, the National Aquaculture Council and Seafood Experience Australia and with the support of the Australian Seafood Cooperative Research Centre and the Fisheries Research and Development Corporation to address current and future market access challenges faced by the seafood industry.

This project is aimed at providing the security of financial resources and access to technical capacity that will be required to support the ongoing operation of the SAF that will be critical in assisting the Seafood CRC in delivering on its projected industry growth target over the life of the Seafood CRC program and into the

future.

## 1.1 Need

In establishing the SAF in Canberra in January 2008, the founding members took into account the findings of the following two reports commissioned by the Seafood CRC. These were:

1. *Assessment of Infrastructure and Priority Needs for the CRC Technical Market Access Support Program*, December 2007 – Kevin Shiell VRS Pty Ltd; and
2. *Review of Technical Market Access Issues Relevant to Australian Seafood Industry Members of the Seafood CRC*, October 2007 - David J Padula and Andrew M Pointon.

The Shiell report found that unlike other key primary industry sectors of the Australian economy, the seafood industry did not have the organisational framework in place to strategically address its current and emerging technical trade and market access issues. As such, it was often leaving relevant government agencies with the difficult task of setting and addressing seafood market access priorities with little, or no, guidance from industry. The report found that *“the approach adopted by the horticulture industry appears to offer the seafood industry a more relevant model than that provided by others”*. Also, that *“there were a number of areas where the Seafood CRC can make a valuable contribution to improving market access for seafood”*.

The Padula/Pointon report reviewed a number of areas relevant to technical market access issues relevant to the seafood industry and found, among other things, a number of opportunities for the seafood industry to be more active in resolving market access issues. In addition to identifying capability gaps, the report identified opportunities for better utilization of existing capabilities through collaboration (domestically and internationally) on research and development aimed at resolving current and emerging technical market access issues. The proposed establishment of the Seafood Technical experts panel (STEP) in this application provides an appropriate forum for achieving the required collaboration of technical capabilities.

In addition to the above technical report, meetings with senior officials in the Department of Foreign Affairs and Trade (DFAT) and the Department of Agriculture, Fisheries and (DAFF) identified that the seafood industry needed to take a more coordinated and proactive approach to addressing market access issues and should consider adopting and supporting a framework that could bring key industry and government stakeholders together in resolving its market access issues. They advised that those primary industry sectors that had established similar frameworks had achieved significant success in resolving their market access issues.

In line with the findings of the above reports, the SAF provides an industry-driven process in which company, association and government decision makers participate as equal partners in achieving beneficial market access outcomes for both industry and government. To this extent, the SAF provides a solid, rigorous and inclusive process for systematically tackling our seafood trade and market

access barriers by:

1. Identifying and prioritising opportunities for improving trade and market access for Australian seafood including:
  - a. Maintaining and improving access in existing markets;
  - b. Establishing access to new trade opportunities, particularly in higher value markets; and
  - c. The reduction or removal of tariff and non-tariff barriers to seafood trade.
2. Developing well researched positions and strategies on priority opportunities for improving trade and market access for Australian seafood.
3. Providing leadership and coordination in the delivery of actions to realise priority opportunities for improved trade and market access for Australian seafood

It is critical that the Seafood CRC and its participants invest in the ongoing operations of the SAF in addressing trade and market access issues if it is to achieve its projected goal in GVP and jobs growth.

## **1.2 Objectives**

To assist the Seafood CRC in meetings its projected growth targets of doubling the value of the Australian seafood industry to \$4billion per annum and to generate more than 2,800 jobs in rural and regional areas by 2017 by significantly enhancing opportunities for trade through improved access to international markets. This objective will be achieved by:

- a. Providing the secretariat and operational support necessary in establishing and maintain the Seafood Access Forum (SAF) as the inclusive decision making framework for addressing seafood industry trade and market access issues including identifying Seafood CRC investment priorities and providing a path for the utilisation of Seafood CRC research outcomes.
- b. Establishing and maintaining the Seafood Technical Experts Panel (STEP) to be called on at short notice to provide rapid response in resolving trade and market access issues. The STEP will meet on at least two (2) occasions each year to consider research and information requirements referred to it from the SAF;
- c. Establishing and maintaining and up-to-date web based interface for the dissemination to all stakeholders of information (including submissions to government) on trade matters related to the activities of the SAF. The web based interface will reside on the SSA web site and include a secure area dedicated to SAF participants; and
- d. Providing for the establishment of a Seafood Access Response Fund (SARF) to provide a rapid response capability in developing solutions to priority technical market access issues as they arise.

## **2. Methods**

## Seafood Access Forum (SAF)

The Forum's core business is to identify and prioritise market access issues that need to be addressed and to coordinate the development of well researched submissions and strategies to reduce or eliminate barriers to trade and market access for Australian seafood. SAF met between two (2) and four (4) time per annum and operated in accordance with the guiding principles agreed by its Executive. These principles are:

- a. Providing a key process for industry and government decision makers, with the capacity and authority to make decisions and commit resources, to develop agreed strategies, and coordinate actions to address priority trade and market access issues.
- b. Providing an industry driven and inclusive process that empowers seafood industry participants to establish trade and market access priorities and strategies.
- c. Founding organisations supporting and providing leadership to the process, and participants will meet their own costs of participation.
- d. Industry organisations and companies able to participate on an as needs basis, for example when specific issues of interest to them are being considered.
- e. Government agencies responsible negotiating trade access are involved as equal partners.
- f. A Seafood Trade Expert Panel (STEP) established to provide technical input and advice on specific issues (the Seafood CRC has agreed to establish and support the STEP).
- g. All issues considered are supported by sufficient information and analysis to enable decisions to be made regarding actions that will resolve or help to resolve them.

In relation to the SAF operations, SSA were responsible for the facilitation of between 2 and 4 SAF meetings per annum (depending on need) and overseeing progress on delivering SAF outcomes. This includes:

- a. Provision of a Chair for all meetings and, where required, out of session meetings;
- b. Development of meeting agendas in consultation with the SAF Executive, including arranging meeting venues;
- c. The coordination of briefing and background papers to support items on the agenda. In some cases SSA will be required to develop these papers;
- d. Maintaining a record of meeting outcomes, priorities and action list as well as making this available on the dedicated "Trade" section of the SSA web site. This will include maintaining a secure area for SAF participants;
- e. Subject to SAF considerations, coordinating the delivery of policy and technical submissions required to progress priority issues.
- f. Project management of higher level policy and technical research project approved by the SAF Executive. This includes projects to be undertaken via the Seafood Technical Experts Panel (STEP), outlined below.
- g. Representing the SAF at numerous government and intergovernmental forums where trade related matters are being considered.

### 3. Results

The project the SAF has directly and indirectly resulted in:

- identifying and prioritising opportunities for improving trade and market access for Australian seafood.
- establishing well researched positions and strategies on priority opportunities for improving trade and market access for Australian seafood.
- providing leadership and coordination in the delivery of actions to realise priority opportunities for improved trade and market access for Australian seafood.

### 4. Discussion

Below are further discussions of the results.

Identifying and prioritising opportunities for improving trade and market access for Australian seafood.

- Removing, or significantly reducing, tariff and non-tariff barriers to Australian seafood trade in all major international markets with which Australia has concluded negotiations of Free Trade Agreements, and other bilateral and multilateral mechanisms under the auspices of the World Trade Organisations; Ensuring that opportunities for Australian seafood market access are thoroughly investigated and presented in the above-mentioned trade negotiations, through SSA submissions on major trade negotiations at least twice a year and involvement of seafood stakeholders.

Establishing well researched positions and strategies on priority opportunities for improving trade and market access for Australian seafood.

- SAF holds four SAF Executive teleconference, and one physical meeting involving key industry representatives and relevant government departments on the average annually.

Providing leadership and coordination in the delivery of actions to realise priority opportunities for improved trade and market access for Australian seafood.



- Lists of industry priorities, Codex & trade negotiations issues are discussed and decided regularly through the organisation of SAF. SAF takes the participating on behalf of seafood industry in DFAT peak industry meetings, and international trade negotiations and meetings, including the recent Codex CCFFP, and Trans Pacific Partnership. SAF initiates collaboration among seafood industry on major FTA negotiations, and multilateral issues including WTO, FAO, APEC, OECD.

Having established two web databases:

- *SSA Subscriber, logon* (<https://seafood.net.au/secure/>)
- *Logon: Seafood Access Forum* (<https://seafood.net.au/safsecure/logon.php>)
- The first link for SSA Subscriber has information including SSA Online Trade and Market Access Database: Up-to-date statistics for Australian seafood exports and imports; tariffs and duties on Australian seafood in export markets; residue, microbiological, food additive standards in Australia and export markets; detentions of Australian seafood in export markets, and much more.
- The second link provides information including SAF meeting agendas and records, SAF trade issues, trade negotiations, Codex by country and priority (dynamic database).

## 5. Benefits and Adoption

Coordinated and proactive approaches adopted to addressing market access issues. The established framework that brings key industry and government stakeholders together, has achieved significant success in resolving its market access issues.

Trade opportunities maximised in existing and emerging markets with industry taking the lead in addressing critical trade and market access issues.

Reduction or removal of tariff and non-tariff barriers to Australian seafood in export markets.

Industry and government well informed and responsive on trade and market access (export certification and importing country requirements, etc) through 24/7 information service via SSA web portal.

Industry staying ahead of the game (strategic capability) by monitoring and responding to emerging national and international trade issues as they emerge.

## 6. Further Development

Appropriate activities/steps to further develop SAF are recommended below:

The Seafood Access Forum (SAF) will further involve industry, government and other key stakeholders on seafood trade and market access. SAF will provide an important opportunity for industry and government decision makers to network and discuss current and emerging trade and market access issues and opportunities. The issues and opportunities include maintenance or restoration of access in existing markets, new trade access, particularly in higher value markets, and removal of tariff and non-tariff barriers to seafood trade.

SSA will lodge written submissions to DFAT developed in collaboration with industry on priority trade negotiations.

Reports and submissions on technical market access issues will be produced by SSA and SafeFish.

Trade symposium, to which all stakeholders are invited, which will be held annually.

Trade and market access priorities and activities are reported via SSA's online trade and market.

Information of two-way communication on the progress of specific trade and market access issues will be provided.

## 7. Planned Outcomes

### ***Public Benefit Outcomes***

The project consisted of five milestone outcomes below:

Milestone date: 01 Mar 2009	Date achieved: 17 Mar 2009
Milestone date: 01 Mar 2010	Date achieved: 29 Apr 2010
Milestone date: 01 Mar 2011	Date achieved: 09 Jun 2011
Milestone date: 15 Jul 2011	Date achieved: 07 Nov 2011
Final report 01 May 2012	Date achieved: 01 May 2012

### ***Linkages with CRC Milestone Outcomes***

All the documents that have linkages with the CRC Milestone outcomes are attached to Appendix 3. The documents under each Milestone are accordingly attached to a sub-heading of Appendix 3. For more information of the attached documents, please see Appendix 3 at the bottom of this Final Report.

**Milestone date: 01 Mar 2009**

**Date achieved: 17 Mar 2009**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2009 are attached to Appendix 3.1.

**Milestone date: 01 Mar 2010**

**Date achieved: 29 Apr 2010**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2010 are attached to Appendix 3.2.

**Milestone date: 01 Mar 2011**

**Date achieved: 09 Jun 2011**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2011 are attached to Appendix 3.3.

**Milestone date: 15 Jul 2011**

**Date achieved: 07 Nov 2011**

The documents which constitute the Final Report as required under the milestone of 15 Jul 2011 Appendix 3.4.

**Milestone date: 01 May 2012 (Final)**

**Date achieved: 01 May 2012**

The documents which constitute the Final Report as required under the final milestone of 1 May 2012 are attached to Appendix 3.5.

## **8. Conclusion**

As there is a strong need among Australian seafood industry stakeholders to continue the project for Seafood Access Forum, SSA wishes to remain in close relationship with SCRC, and get funding support from SCRC to enhance future funding of the project.

## **9. References**

*Administration Summary of Application for FRDC R&D Funding 2008/907 Communal Project in the Seafood Access Forum (SAF);*

*Administrative Summary of Application for FRDC R&D Funding TL018 in the SSA Program 1: Securing Trade & Market Access for the Australian Seafood Industry.*

## **10. Appendices**

### **Appendix 1:**

Intellectual Property

Not available.

## Appendix 2:

Staff:

- Ted Loveday, SSA Managing Director
- Col Bishop, SSA Management
- Sharon Kimmins, SSA Office Manager
- Song (Simon) Liu, SSA Trade Project Officer

## Appendix 3: Documents that have linkages with CRC Milestone Outcomes

(For more information of the appendix documents, please visit the SSA web page on SAF: <https://seafood.net.au/safsecure/?pid=1417&nid=723>; To get hard copies of any documents, please contact Seafood Services Australia.)

### Appendix 3.1

**Milestone date: 01 Mar 2009**

**Date achieved: 17 Mar 2009**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2009 are below:

- Milestone Mar 2009 Att 1 – SAF Priorities List 19-02-10
- Milestone Mar 2009 Att 2 – SAF Trade Negotiations & Processes 29-01-10
- Milestone Mar 2009 Att 3 – SAF Codex Committees & Processes 29-01-10

### Appendix 3.2

**Milestone date: 01 Mar 2010**

**Date achieved: 29 Apr 2010**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2010 are below:

- Milestone Mar 2010 Att 4 – SAF 4 Record of Meeting 17 June 2009 Draft
- Milestone Mar 2010 Att 5 – SAF 5 Meeting Record 2 September 2009 Draft
- Milestone Mar 2010 Att 6 – SAF 6 Meeting Record 25 February 2010 Draft

### Appendix 3.3

**Milestone date: 01 Mar 2011**

**Date achieved: 09 Jun 2011**

The documents which constitute the Final Report as required under the milestone of 1 Mar 2011 are below:

- Milestone Mar 2011 Att 7 – SAF Trade Issues & Priorities List – Codex – Trade Negotiations (Updated 21-2-11)
- Milestone Mar 2011 Att 8 – Record of SAF Executive Meeting 27 July 2010
- Milestone Mar 2011 Att 9 – Record of SAF 7 Meeting 19 Aug 2010

- Milestone Mar 2011 Att 10 – SSA submission Australia-China FTA Seafood Trade
- Milestone Mar 2011 Att 11 – SSA submission Australia-Malaysia FTA ROO
- Milestone Mar 2011 Att 12 – Draft 2 – Minutes – SAF Executive Meeting 21 Feb 2011
- Milestone Mar 2011 Att 13 – FTAs to Trade Minister FINAL

## Appendix 3.4

**Milestone date: 15 Jul 2011**

**Date achieved: 07 Nov 2011**

The documents which constitute the Final Report as required under the milestone of 15 Jul 2011 are below:

- Milestone Jul 2011 Att 14 – SAF Trade Issues & Priorities List – Codex – Trade Negotiations (Updated 31 March 2011)
- Milestone Jul 2011 Att 15 – Notes from SSA Network & Trade Forum (24 Feb 2011)
- Milestone Jul 2011 Att 16 – SSA submission Australia – Japan FTA industry priorities Final (28 Mar 2011)
- Milestone Jul 2011 Att 17 – Draft Minutes SAF Executive Meeting – 3 May 2011
- Milestone Jul 2011 Att 18 – SSA Bulletin June 2011
- Milestone Jul 2011 Att 19 – Emails exchange between SSA and DFAT on Australia and Korea FTA 13 July 2010

## Appendix 3.5

**Milestone date: 01 May 2012 (Final)**

**Date achieved: 01 May 2012**

The documents which constitute the Final Report as required under the final milestone of 1 May 2012 are below:

- Milestone May 2012 Att 20 – SAF Trade Issues & Priorities List – Codex – Trade Negotiations (updated 26 July 2011)
- Milestone May 2012 Att 21 – SAF Trade Issues & Priorities List – Codex – Trade Negotiations (updated 3 October 2011)
- Milestone May 2012 Att 22 – Minutes for SAF Executive Teleconference on 2 August 2011
- Milestone May 2012 Att 23 – Final SSA submission on Australia India FTA
- Milestone May 2012 Att 24 – Trade Issues (updated 1 March 2012)
- Milestone May 2012 Att 25 – Codex (updated 25 Jan 2012)
- Milestone May 2012 Att 26 – Trade Negotiations (updated 13 Feb 2012)
- Milestone May 2012 Att 27 – Minutes of Joint SAF and SAF Executive Meeting 11 on 27 October 2011
- Milestone May 2012 Att 28 – Trans Pacific Partnership
- Milestone May 2012 Att 29 – Draft Minutes SAF Executive 12 held 7 February 2012
- Milestone May 2012 Att 30 – Minutes SAF Executive 13 held 24 April 2012 (3<sup>rd</sup> draft)