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Identifying opportunities for developing community supported fisheries in South Australia's small scale, multi-species, multi-gear community based fisheries

Jonathan McPhail

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PIRSA Fisheries and Aquaculture is indeed grateful for the support of Dr Joshua Stoll who flew from the other side of the world (Maine, Northeast America) to spend a week travelling across the unique coast line of South Australia to present the Community Supported Fisheries (CSF) concept and experience he has gained from direct involvement in the Walking Fish Cooperative to licence holders in the MSF, LCF and Wildcatch Fisheries SA.

This report was reviewed by Ms Alice Fistr (PIRSA), Mr Bart Butson (a Marine Scalefish Fishery licence holder), Dr Joshua Stoll, Mr Neil MacDonald (Executive Officer, Marine Scalefish Net fishermen's Association) and an anonymous external reviewer. Their comments and suggestions were invaluable in help improve the report. Prof Gavin Begg, A/Executive Director, PIRSA Fisheries and Aquaculture approved the report for release.

Abbreviations

ACRONYM	MEANING
CSF	Community Supported Fishery
FRDC	Fisheries Research and Development Corporation
FTE	Full Time Equivalent
LCF	Lakes and Coorong Fishery
MSF	Marine Scalefish Fishery
PIRSA	Primary Industry and Regions South Australia
RSF	Restaurant Supported Fisheries
SA	South Australia
SARDI	South Australian Research and Development Institute
SAFCOL	South Australian Fisherman's Co-Operative Limited
WFC	Walking Fish Cooperative

Executive Summary

Overview

This project was undertaken by PIRSA with the support of Dr Joshua Stoll. The commercial Marine Scalefish Fishery (MSF) and Lakes and Coorong Fishery (LCF), similarly to other small community based fisheries across Australia, are facing significant challenges to build their economic, social and environmental credentials. These challenges are heightened as a result of consumers' poor understanding and perception of small scale commercial fisheries' contribution to local and regional communities. This poor perception of small scale commercial fishery industry members has amplified during the past decade through the media. In undertaking this project there was evidence of a clear divide between commercial fishers and their communities, in particular, a licence holder provided his personal story of the current situation:

“I walk into my local pub and I have to sit in the corner away from other people in my community and eat my dinner, as the job I have is frowned upon, I want to return to the good old days of feeling proud of being a commercial fisher and being part of a community”.

In North America, local seafood movements such as the [Walking Fish Cooperative](#) and [LocalCatch.org](#) have been emerging with the aims of enhancing connections between commercial fishers and consumers through investing in local and direct marketing of seafood. The Walking Fish initiative is a community supported fishery (CSF) concept offering the community the opportunity to 'subscribe' to a season of fresh and seasonally caught local fish. This allows commercial fishers to receive a better price for their catch, but more importantly reconnect them with their local and regional communities. Dr Stoll has been a key driver for implementing CSFs in North America, which has had numerous successes and achievements from the growth of fishing businesses to the sustainability of fish stocks, but most importantly building close relationships with local communities.

In June 2017, PIRSA with funding from FRDC and the support of Dr Stoll held several workshops and meetings with commercial fishers in the LCF and MSF, members of Wildcatch Fisheries SA and fish markets to understand whether the concept of a CSF would be applicable in South Australia. These workshops and meetings provided insight into the challenges being faced by commercial fishers in local and regional areas of South Australia. Some of the challenges identified by industry members included:

- Negative public perception and mistrust of commercial fisheries
- Increased conflict both within and between the commercial and recreational sector
- Limited education provided to the community when selling fish and the need for more information and connection with the community
- Lack of consideration given to the seafood consumer
- Commercial fishers not receiving a fair price for fish in the various fish markets that they supply, which is exacerbated by competition among commercial fishers and between local and imported seafood
- Issues with the supply chain and the product being received by the consumer
- Fishery regulations impeding a constant supply of fresh fish and restricting access to secondary species
- Reactive regulatory adjustments creating uncertainty regarding the long-term direction of the fishery

Dr Stoll and the commercial fishers discussed some potential strategies to address these challenges and identified opportunities in their local region to support commercial fishing businesses. The key concern identified by Dr Stoll whilst in South Australia was the need to build community support for supplying fresh local fish. Some of the opportunities discussed at the workshops and meetings included:

- A survey of the South Australian public to understand their needs for consuming seafood.
- Developing a novel local and direct marketing and distribution strategies to improve community support for commercial fishing in South Australia, this is to include:
 - Improving the supply chain – ‘Boat to Plate’ or the CSF concept.
 - Providing opportunities to sell locally through fresh fish sales off the boat, farmers markets, community centres, schools, charities, fish and chip shops, local cafes, restaurants and online marketing.
 - Directly engaging with the consumer and telling commercial fishers’ stories.
 - Development of key messages about the South Australian commercial fishing industry.
 - Development of videos of commercial fishers from across the region, showcasing each commercial fisher’s story i.e. reasons why they are commercial fishers, purpose of being part of a community, showing the use of fishing equipment and explaining environmental stewardship of the resource.
 - Development of recipe cards (especially for underutilised or lesser known species) for when fish are sold and include key information such as the species’ status classification, where and how the fish were caught and management arrangements.
 - Opportunities in local tourism for providing seafood through holiday packages.
 - Development of a major seafood event(s) that connects commercial fishers and the community.
- Improve and maintain relationships between commercial fishers and PIRSA, including working together cooperatively.
- Form a dedicated working group of commercial fishers to support the trial of a CSF in Adelaide.

Overall, the CSF concept was well received by licence holders as they recognised the diverse fishing landscape and the opportunities it can provide, such as improved prices for underutilised or lesser known species, enhanced value of the ‘best seafood in the world’ and also the significant value of building community support for their social licence to fish. Nevertheless, there were commercial fishers who questioned the concept and how it would support their fishing businesses. There was also evidence across the state of commercial fishers already developing novel marketing initiatives to build community support and enhance the value of fresh seafood.

The workshops and meetings with commercial fishers and fish markets provided insights into the challenges being faced and the many opportunities that lay ahead. There were however two fundamental outcomes from this project:

1. A requirement to build community support through various novel marketing and delivery strategies; and
2. Support a trial of a CSF in Adelaide.

Having developed the outcomes above, it is vital that commercial fishers have the willingness to build, establish and maintain relationships with each other and the South Australian Government to work towards building community support and an understanding of the needs of local and regional communities.

Keywords: Community Supported Fishery, Lakes and Coorong Fishery, Marine Scalefish Fishery, commercial fisheries, underutilised species, local and regional communities.

Introduction

Similar to other small scale, multi-species, multi-gear, community based commercial fisheries across Australia, the commercial Marine Scalefish Fishery (MSF) and Lakes and Coorong (LCF) are a valuable social and economic contributor to many regional coastal communities in South Australia. The MSF and LCF have built a reputation for harvesting seafood from pristine waters and supplying some of the most sought after, premium seafood species in the world, including King George Whiting (*Sillaginodes punctatus*), Snapper (*Chrysophrys auratus*), Southern Garfish (*Hyporhamphus auratus*), Southern Calamari (*Sepioteuthis australis*), Coorong (Yellow-eye) Mullet (*Aldrichetta forsteri*), Pipi (*Donax deltoids*) and Mulloway (*Argyrosomus japonicas*). In 2017/18, the commercial MSF and LCF contributed over \$34 million to the South Australian economy and produced approximately 4,176 tonnes of seafood for the local, domestic and international markets (Econsearch 2019; Econsearch 2019a). Together these fisheries support more than 820 fte jobs through fishing activities as well as processing and supplying fresh fish and bait, the purchase and maintenance of boats, marine engines, tackle and bait (Econsearch 2019; Econsearch 2019a).

In recent times, the MSF and LCF have been facing numerous challenges due to: the community owned nature of the resources on which they are based, competition within the operating environment, diversity of stakeholders, strict regulations, foreign imports, the biological and ecological dynamics and inherent uncertainties in environmental variation; and declining stock status of key species. Furthermore, while fish from the fishery are purchased by consumers, many commercial fishers perceive that most consumers do not make the connection with where their fish comes from, or value the fishery service of providing fresh local fish to eat. The combination of these factors is weakening the fisheries' social licence and limiting their opportunities to build their economic, social and environmental credentials.

In addition, consumer demand for locally produced food is growing. Consumers are increasingly interested in purchasing fresh product within close proximity to their home as evidenced by the recent growth of farmers markets. Many seafood consumers value the boat to plate idea, increased access to premium, locally caught seafood and for a fair price.

Given this and the significant challenges being faced, many small-scale commercial fishers in South Australia are seeking new ways to sell to the consumer through providing locally caught fresh seafood, utilising low-valued species, re-building relationships with local communities, supporting sustainable stocks and importantly maintaining an economical viable fishery. Commercial fishers are aware they can no longer simply catch more fish to compensate for low prices.

This project has been undertaken to understand whether the emerging CSF concept can address the challenges being faced in small scale community based fisheries, to support them continuing to supply fresh fish to the seafood-consuming community, whilst maintaining sustainable fish stocks and an economically viable industry that contributes to local and regional communities.

The first section of the report outlines the history of the MSF and LCF and their importance to local regional communities. The methodology section of this report provides information on how, where and who was involved in the project.

The results section provides the information collected from workshops and meetings with licence holders in the MSF and LCF, the peak representative industry body for the commercial fishing sector – Wildcatch Fisheries SA, and visits to the fish markets. The key findings from these sections are presented in the discussion/conclusion.

Objectives

The following are the objectives of the study:

1. Undertake a review of South Australian small scale, community based fisheries and the alternative marketing strategies, in particular CSF.
2. Dr Stoll to provide licence holders in the LCF, MSF and members of Wildcatch Fisheries SA with an understanding of a CSF, including the successful case studies from North America.
3. Undertake a workshop with licence holders in the MSF, LCF and members of Wildcatch Fisheries SA to discuss:
 - a. The opportunities for developing a project to trial a CSF in their local area/region.
 - b. The specific steps and necessities to implement and trial a CSF in their local area/region.
 - c. Any other concepts to further support fostering economic opportunities, cultivate healthy communities, and encourage environmental stewardship.
4. PIRSA to provide a summary report of the discussions and outcomes of the workshops and meetings with licence holders in the LCF, MSF and members of Wildcatch Fisheries SA.

Method

To obtain an understanding of whether the CSF concept would be suitable in South Australia the following steps were undertaken:

1. PIRSA coordinated a series of workshops and meetings across key ports in South Australia with licence holders in the LCF, MSF and members of Wildcatch Fisheries SA.
2. Dr Stoll facilitated various workshops and meetings to determine whether this concept would be suitable for a trial in South Australia, these workshops included:
 - a. Presentations on Community Supported Fishery (CSF), including the successful case studies from North America.
 - b. The opportunities for developing a project to trial a CSF in their local area/region.
 - c. The specific steps and necessities to implement and trial a CSF in their local area/region.
 - d. Any other concepts to further support fostering economic opportunities, cultivate healthy communities, and encourage environmental stewardship.

Dr Joshua Stoll

Dr Stoll has extensive experience working with small-scale commercial fishers across North America, exploring ways to increase communities' economic, social, and stewardship capacity. In 2011 he founded LocalCatch.org and has significant experience in dealing with the challenges and opportunities associated with creating local markets for small-scale commercial fishers, which has come from his direct involvement with the Walking Fish Cooperative, a commercial fisher's cooperative that he helped establish in 2009. He also has experience working on commercial fishing boats and, owns and operates Georgetown Island Oyster Company. He has a Bachelor of Arts degree in Environmental Studies from Bates College, a Masters of Coastal Environmental Management from Duke University's Nicholas School of the Environment, and a PhD in Ecology and Environmental Sciences from the University of Maine.

Results

Review of Small-Scale Community Based Fisheries in South Australia and the Community Supported Fishery Concept

The following section provides a review on small-scale community based fisheries in South Australia and the different Community Supported Fisheries concepts that have been implemented around the world.

The role of government in managing fisheries

The marine, estuarine and freshwater fisheries resources of South Australia are community owned resources. The role of the South Australian Government, as custodian of these resources on behalf of the broader community and future generations, is to make sure these resources are protected, managed and used in an ecologically sustainable way, in line with the objectives of fisheries legislation. The *Fisheries Management Act 2007* puts the highest priority on managing for sustainability, to make sure fish stocks are protected from over-exploitation. It also requires the government to allocate access to users of fisheries resources in a way that best uses and best shares our resources for the benefit of the whole community.

Experience world-wide has demonstrated that where unrestricted access to fisheries resources is allowed, the incentive for individuals to conserve fish stocks is diminished. The resulting competition among and between user groups often leads to increased fishing effort and excess fleet capacity, which in time reduces biological, ecological and economic productivity.

In managing fisheries resources, the South Australian Government has the primary responsibility of balancing utilisation with the need to ensure long-term resource sustainability. The Act recognises three distinct fishing sectors: recreational, commercial and Aboriginal traditional. The Government must ensure the basis for sharing fisheries resources among user groups is equitable and clearly understood. Fishing activities by all sectors are fostered because they are recognised as generating valuable social and economic benefits to the wider South Australian community.

In South Australia, PIRSA is the government agency responsible for managing South Australia's fish stocks on the behalf of the community. PIRSA manages the LCF and MSF fish stocks in partnership with key stakeholder groups. In the case of the commercial fishing sector, seafood consumers are also a key stakeholder. The range of fisheries management tools includes output controls such as quota restrictions, daily catch limits, minimum and maximum size limits, and recreational bag and boat limits, as well as input controls such as closed areas, closed seasons, gear restrictions, vessel size and capacity restrictions, limited entry provisions, and limitations on the number of people that may assist with fishing operations.

Marine Scalefish Fishery

Commercial marine scalefish fishing commenced almost simultaneously with the arrival of European settlers, initially as a means of providing food for the new colony (PIRSA 2013). Fishing for scalefish increased with the demise of the whaling industry in the 1840s, with the nature of the fishery and the gear types being influenced by the arrival of immigrants from the United Kingdom and Scandinavia, and during the 1870s and 1880s from Greece and Italy (PIRSA 2013).

Licensing was first introduced in 1904 and during the Depression in the 1930s fishing licences were issued as a means of addressing rising unemployment, and in 1934 a total of 1463 licences were issued (PIRSA 2013). The capacity of the fishing fleet has not only been influenced by the number of licences issued, but also by technological advances in powered vessels (engines), refrigeration and processing (PIRSA 2013). The introduction of engines began in the early 1900s and came into general use by the 1930s (PIRSA 2013). Iceboxes were also an innovation that altered the way fish were kept and brought to market. Between the early to mid-1900s ice boxes replaced wells, carrying capacity increased and catches could be stored at sea for longer. The first fish cannery opened in the 1890s on

Kangaroo Island, where King George Whiting was the main fish processed. Further canneries were opened in Port Lincoln and other West Coast towns during the mid-1900s for the purpose of preserving catches of Western Australian Salmon and Australian Herring (Tommy Ruff) (PIRSA 2013). The Port Lincoln cannery was still in operation in the early 1960s; however, production had switched from marine scalefish species to Southern Bluefin Tuna, a species that is managed by the Australian Government (Noell et al. 2006).

Modern day fisheries management began in the late 1970s when there was a freeze on issuing new licences, and entry into the fishery was capped (PIRSA 2013). Since this time there have been continued increases in fishing capacity through technological advances, particularly in fish location through the use of sonar, echo sounders, global positioning systems (GPS) and computer software packages that integrate and store data from these devices (PIRSA 2013). Managing this increase in effective effort is a key challenge of the MSF. Since the late 1970s there have been continual management changes aimed at reducing overall effort in the fishery to counter this effort creep (PIRSA 2013).

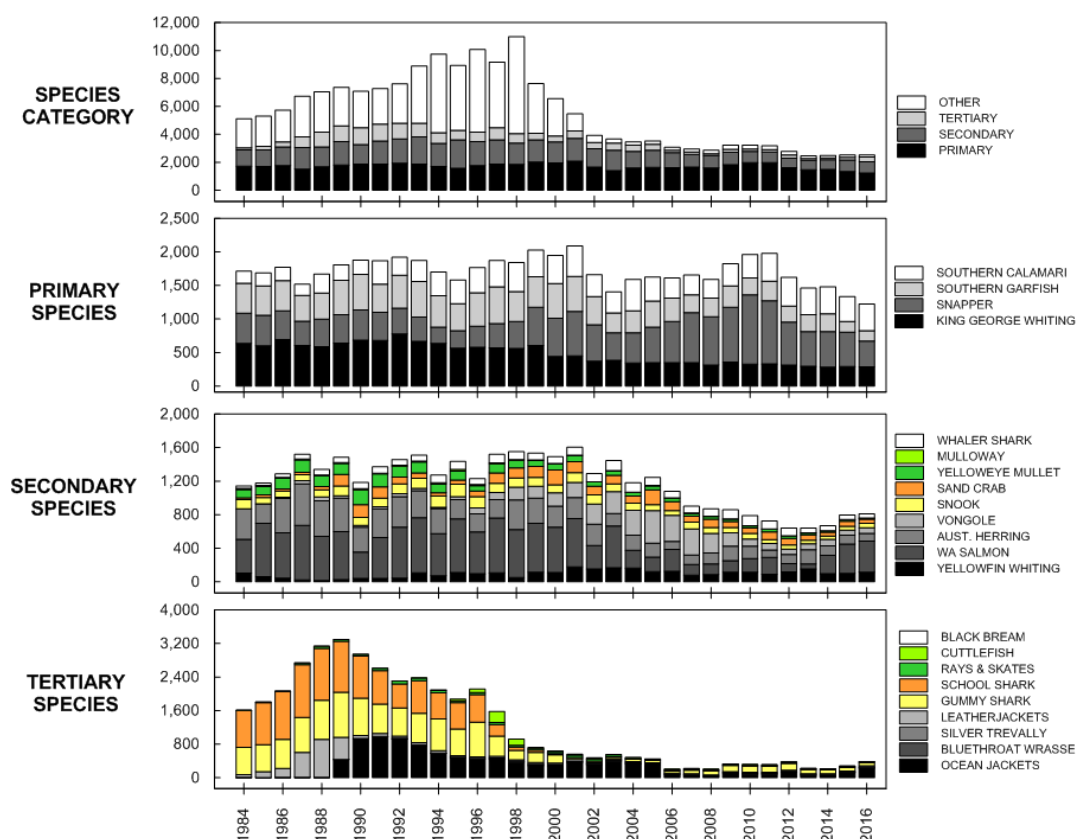
Today, the commercial MSF continues as a multi-species, multi-gear, multi-sector community based fishery that operates in all coastal waters of South Australia between the Western Australian and Victorian boarder. The fishery operates out to three nautical miles and for some species through the Offshore Constitutional Settlement extends out to the Australian Exclusive Economic zone (see Figure 1). As of 1 July 2018, there are 307 MSF licences and 3 Restricted MSF licences with State-wide access, and a further 148 Southern Rock Lobster, 61 Northern Rock Lobster and 36 Lakes and Coorong fishery licences with commercial access to marine scalefish species.

Figure 1: Waters of the South Australian MSF



The MSF fishing fleet can use up to 28 different registered gear types (including long lines, hand lines, haul nets and fish traps) and harvest in excess of 60 species. The main species taken are King George Whiting, Southern Garfish, Snapper and Southern Calamari (Steer et al. 2018). These four species make up approximately 50% of the total fishery production weight (see Figure 2) and 70% of the total fishery value (Steer et al. 2018).

Figure 2: Composition of catch in the South Australian MSF



Source: Steer et al. 2018

In 2017/18, the MSF gross value of production was \$22.8 million and total contribution to Gross State Product was \$46.4 million (Econsearch 2019). Direct fishery employment was 327 full time equivalent (fte) and total employment impact as 658 full time equivalent (fte) jobs state-wide (Econsearch 2019). Further to this, key species in the MSF also support a significant amount of recreational fishing activity, both in terms of participation and catch, with 277,000 – or one in six – South Australians recreationally fishing (Giri and Hall 2015).

Lakes and Coorong Fishery

The Lakes and Coorong Fishery has had access to resources in freshwater, estuarine and adjacent marine habitats in the lower Murray River system in South Australia since 1846 (Olsen and Evans, 1991). During this early period of development, the fishery was characterised by artisanal and subsistence operations, with most commercial fishers operating on a seasonal basis. In 1906, a newspaper report (*Register*, September 1906) documented that two men were fishing on a commercial basis to supply the needs of the local Goolwa community and starting to preserve fish for wider distribution (Olsen and Evans, 1991).

The growth of commercial fishing activities in the Lower Lakes and Coorong region was stimulated by the development of the steamer-barge trade, which commenced in 1853 through the ports of Goolwa and Milang. Over time, fishing provided full and part time employment for residents of the local area and for idle steamer crews waiting for cargoes, or during periods of low water levels when their vessels were unable to safely navigate the River Murray. As fishing developed in the region, both ports served as bases for commercial fish landings, where fresh and preserved fish were consigned for sale at the Adelaide fish markets (Olsen and Evans, 1991). The main species taken from the region during this period were Mulloway, Black Bream, Yelloweye Mullet, Western Australian Salmon and Australian Herring (Tommy Ruff). Fishing equipment used included locally built, naturally aspirated wooden vessels, setlines and various net designs with different lengths and mesh sizes, all constructed from natural fibres (Olsen and Evans, 1991).

A number of unique methods have been developed over time by commercial fishers, including swinger nets and cockle rakes used to target Mulloway and Pipi (Goolwa Cockles), respectively, on the ocean beaches of the Sir Richard and Youngusband Peninsulas (PIRSA 2016). Although modern technologies and materials (such as motor powered aluminium fishing vessels and synthetic fibres used to construct fishing nets) have been adopted, changes to fundamental fishing practices have been relatively superficial, when compared to the advances made in many other commercial fisheries (PIRSA 2016). This reflects the unique characteristics of the Lakes and Coorong region and a desire from the commercial industry and Government to contain effective fishing effort levels within historical and sustainable limits (PIRSA 2016).

In 1896, there were approximately 30 full time commercial fishers operating in the Lakes and Coorong region, based mainly at Goolwa and Milang (PIRSA 2016). The South Australian Government introduced a requirement in 1906 for all commercial fishers to hold a commercial fishing licence. In 1915, there were 15 licensed commercial fishers operating in the Lakes and Coorong region, however, the number of unlicensed fishers may have been significantly greater at times, particularly during the Depression years and when the steamer trade through Goolwa slowed due to low river flows (PIRSA 2016). Prior to construction of the barrage network, up to about 30 commercial fishers operated regularly in the southern Coorong lagoon when conditions were favourable (PIRSA 2016). In 1940, following barrage construction in the Coorong, there were 64 fishing licences issued in the Lakes and Coorong region. This number dropped to 13 by 1970, evidently due to military enlistments and regulations on the number of additional agents (persons assisting fishing operations) permitted. Following this, records indicate that the number of licensed commercial fishers in the fishery rose to a maximum of 106 commercial fishers in 1972 (Olsen and Evans, 1991), before being substantially reduced with the introduction of new licensing criteria.

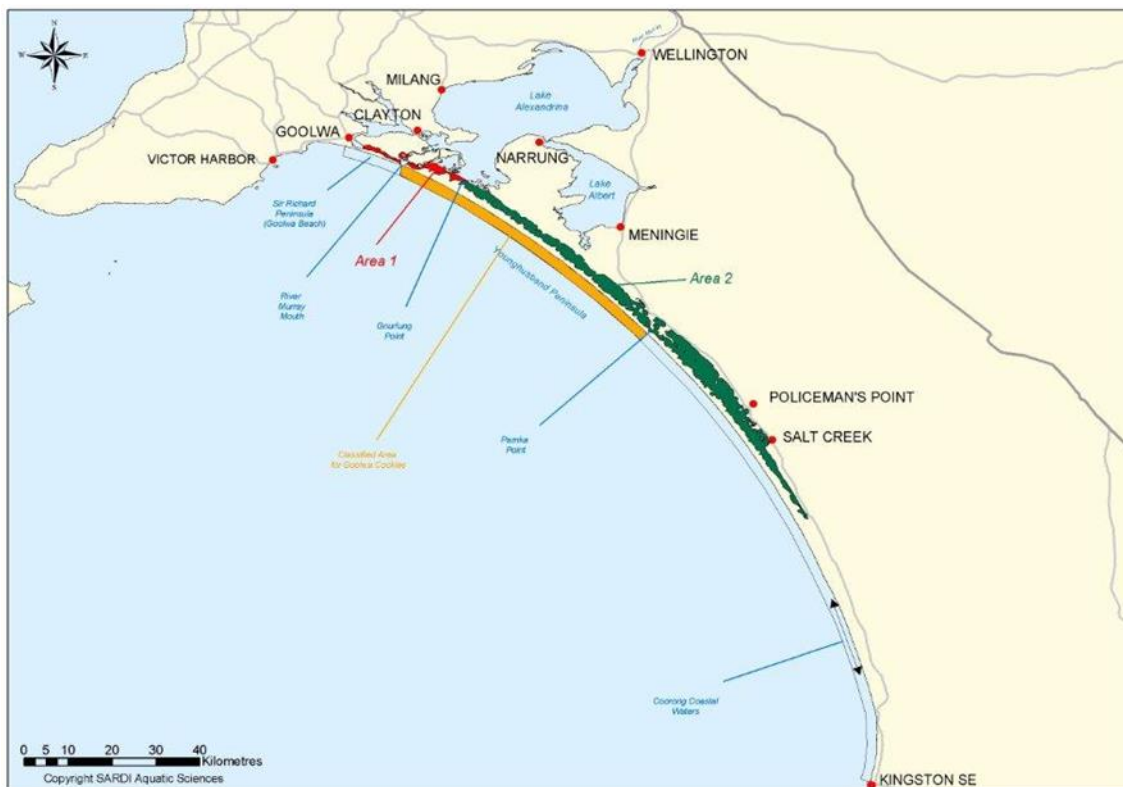
From January 1972, all licensed commercial fishers were required to furnish the then South Australian Department of Fisheries with monthly catch and effort returns detailing the total weight of each fish species caught, the fishing location (one degree statistical blocks), the method of capture and the duration of fishing time (PIRSA 2016). In 1984/85, the fishery was divided into 16 areas for the purpose of data collection and more detailed fishing location information was collected from operators (PIRSA 2016). In 1984, the *Scheme of Management (Lakes and Coorong Fishery) Regulations 1984* was introduced to formally manage the Lakes and Coorong Fishery as a distinct fishery, separate from the MSF and management arrangements have been continually implemented to reduce effort creep in the fishery (PIRSA 2016).

Today, the commercial LCF continues a multi-species, multi-gear, multi-sector community based fishery that operates in three separate, but closely linked, ecosystem components (Figure 2). These are the Coorong; the freshwater lower lakes of Lake Alexandrina and Lake Albert; and the adjacent coastal marine waters along the Sir Richard and Youngusband Peninsulas.

The LCF fishing fleet can use up to 15 different gear types (including mesh nets, swinger nets, hauling nets, setlines and cockle rakes) and target in excess of 40 species (PIRSA 2016). The main species taken are Golden Perch (*Macquaria ambigua*), Mulloway, Pipi and Yellow-eye Mullet, which comprise the majority of the catch and total fishery value (PIRSA 2016). The fishery has largely been managed through the use of input controls which aim to limit the total amount of effort that can be directed into the fishery to ensure the sustainability of the aquatic resources on which the fishery is based. A quota management system was implemented for Pipi in the LCF since 2007/08 (PIRSA 2016).

In 2017/18, the LCF gross value of production was \$11.5 million and total contribution to Gross State Product was \$20 million (Econsearch 2019a). Direct fishery employment was 70 fte jobs and total employment impact was 162 fte jobs state-wide (Econsearch 2019a). Species taken in the LCF also support a significant amount of recreational fishing activity, both in terms of participation and catch (PIRSA 2016).

Figure 3: Waters of the South Australian LCF



Chain of custody in the MSF and LCF

Commercial fishers in South Australia are permitted to sell their catch to registered fish processors and non-quoted species to the general public. Any person processing fish or aquatic resources from South Australian commercial fishers must be registered as a fish processor with PIRSA. A person that only purchases fish or aquatic resources from a registered fish processor are not required to register as a fish processor. It is illegal for a person without a commercial fishing licence to sell their catch.

Industry leaders in the MSF and LCF have indicated that local and regional communities are always the priority when selling their catch, however a large proportion of the commercial catch harvested in the MSF and LCF is freighted and processed by the South Australian Fisherman's Co-Operative Limited (SAFCOL). The remaining is either sent to domestic markets (Sydney and Melbourne), export markets, family business or companies (Fresh Fish Place, Ferguson Australia, Cappos, PipiCo and Raptis) and more recently to up market restaurants in major city centres. Figure 4 provides a schematic representation of the MSF and LCF value chain and provides an indication of the disconnect of commercial fishers to the consumer.

The value and saleability of seafood is dependent upon its condition on reaching market. Accordingly, commercial fishers in the MSF and LCF have indicated that it is of utmost importance that seafood products are handled appropriately at each stage of the production system. The operations of the commercial fishers and the subsequent handling, processing and transport sectors determine the quality of seafood produced for sale. The large majority of fish sold on both domestic and export markets are frozen or chilled. Fish are sold whole, gilled and gutted, in outlet or fillet form.

Figure 4: A schematic representation of the South Australian MSF and LCF commercial fishing industries value chain.



Review of Alternative Marketing Strategies for Commercial Fishers

In North America, local seafood movements have recently emerged with the aims of enhancing connections between commercial fishers and consumers and improving social, economic and environmental sustainability (Witter 2012). Many small-scale commercial fisheries in this region have invested in marketing strategies as a way to make more from their catch and re-build relationships with their communities (Witter 2012). Over the years, different types of local and direct marketing arrangements have emerged and these marketing arrangements are different depending on the particular circumstances, but in general can be summarised as: CSFs, Off-the-boat sales, fishers'/farmers' markets, restaurant supported fisheries, boat-to-institutions, and online sales (Dr Stoll, 2017 pers. comm.; Chase and Otts 2016). The following information provides details about the alternative marketing strategies that have emerged to help commercial fishers earn an increased profit, provide competitive pricing for the consumer and fresh fish. Most of these marketing strategies are from Connecting Local Seafood and Consumers: Direct Marketing 101 (Chase and Otts 2016).

Community Supported Fisheries (CSFs)

A central component of the seafood movements has been the emergence of the CSF concept (Witter 2012). The CSF concept first developed in early 2000s and was based on the community supported agriculture model (Witter 2012). Although slightly different in form and function due to varying local contexts CSFs are commonly aimed at connecting the community with local commercial fishers through direct marketing (Witter 2012). CSFs may be run by an individual fisher, a group of fishers organized as a cooperative or in some other way, or a local community organization (Stoll et al. 2015). CSFs can be structured as non-profit or for-profit businesses (Stoll et al. 2015). CSF members, also called shareholders, provide commercial fishers with financial support by paying in advance of the season in exchange for a weekly share of seafood caught during the season (Stoll et al. 2015). By receiving payment upfront instead of post-harvest, commercial fishers know what they are going to earn, providing them with a less risky means to invest in their operations (e.g., through the purchase of new gear, additional quota, or infrastructure) (Stoll et al. 2015). CSFs can be seasonal or year-round. They may offer a delivery option or pick-up at retail locations or farmers' markets.

The Walking Fish Cooperative in eastern North Carolina is one example of a CSF and offers the community the opportunity to 'subscribe' to a season of fresh and seasonally caught local fish (Dr

Stoll, 2017 pers. comm.). This allows commercial fishers to get a better price for their catch, but more importantly reconnect them with their communities and allow commercial fishers to stay in business (Dr Stoll, 2017 pers. comm.). Through this CSF the better price for the catch has provided for gear improvements that minimize fuel costs, bycatch levels, negative impacts on aquatic habitats and allowing marketing that puts a fisher's face to the catch being sold to the local community (Dr Stoll, 2017 pers. comm.).

Off-the-Boat Sales

Before the development of technology and connection to the world, commercial fishers sold their catch fresh off their boats. These boat sales are an important revenue stream for many fishers today. Off-the-boat sales occur on the dock, pier or jetty where the boat is moored, and supply is often limited to what fishers harvested that day. Off-the-boat sales are attractive for consumers seeking the freshest seafood available or trying to directly connect with their food sources, which in turn provides the commercial fisher with a connection to the local community.

Fisher and Farmers' Markets

Commercial fishers have traditionally sold their catch at the local markets. Fish markets, historically dedicated to the wholesale trade between fishers and fish merchants and could be found in most commercial fishing ports. More recently, farmers' markets have grown in popularity and local vendors have expanded beyond local fruits and vegetables, retail opportunities have opened up for fishers. Farmers' markets are physical locations where vendors of a variety of food products come together on a regular schedule to sell directly to customers. Farmers' markets are a convenient way for consumers to interact with local producers and buy fresh produce, seafood, fruit, meat, dairy, and other locally produced food products.

Restaurant Supported Fisheries

Restaurants in coastal communities are well known to exploit the availability of local seafood. As the seafood movement has emerged restaurants from major city centers have become more interested, chefs and restaurateurs are responding to consumer demand by buying locally harvested seafood. In some instances, restaurants are selling the commercial fisher's stories as well as the fish. While individual commercial fishers can and do sell to restaurants, chefs often buy seafood in larger quantities than a single fisher can provide. Busy chefs may not have the time to foster business relationships with multiple fishers in order to obtain the desired volume. Restaurant Supported Fisheries (RSFs) are an adaptation of the CSF model to address the needs of chefs and restaurants. RSFs are often operated as part of a CSF or partner with a CSF, as the operational, regulatory, distribution, and marketing frameworks are similar.

Boat-to-Institution Sales

Boat-to-institution sales have emerged across America more recently as an alternative marketing strategy. As consumers of food in institutional settings have increased their requests for locally sourced food, some institutions have begun to look for opportunities to purchase from local producers. Institutional sales can be challenging for local food producers. Institutions, such as schools and hospitals, require large quantities of food and regular supply that can be difficult for small-scale producers to provide.

Online Marketing and Sales

In today's world, the local phone book and newspaper are no longer the first place consumers turn when seeking to purchase goods and services. Consumers now primarily rely on the internet, online search engines and mobile apps to find what they are looking for. An emerging opportunity for online sales is mobile market purchases, which allows fishers to utilize the internet to sell directly to consumers through applications that are downloaded onto cellphones or other mobile devices. The use of mobile applications to facilitate sales taps into a market of users that want to combine instant information with local purchases. Fishers engaging in online application driven sales need to be aware that regulatory requirements still apply.

Workshops and Meetings with Licence Holders in the MSF and LCF

In June 2017, PIRSA invited Dr Stoll to South Australia to facilitate workshops with licence holders in the MSF, LCF and members of Wildcatch Fisheries SA to determine whether a CSF would be suitable for a trial in South Australia. The workshops included visiting local and regional ports, including:

- Meningie to meet with net licence holders in the commercial LCF.
- Goolwa to meet with Pipi licence holders in the commercial LCF.
- Port Wakefield to meet with net licence holders in the commercial MSF.
- Wallaroo to meet with line licence holders in the commercial MSF.
- Port Adelaide to meet with members of Wildcatch Fisheries SA.

Meetings were also held with the South Australian Fishermen's Co-operative Limited (SAFCOL) in Adelaide, the Fresh Fish Place and Myers Seafood's in Port Lincoln. These locations were selected to provide Dr Stoll with an insight into some of the main locations commercial fishers would sell their catch.

Figure 5: Locations of workshops and meetings



At each workshop, Dr Stoll provided a presentation as to the history and issues that small commercial fisheries were dealing with in North America and how the direct marketing and development of CSF concept had emerged. This presentation then led into a workshop that focused on the following key questions:

1. What are the key issues/challenges in the fishery?
2. What are the opportunities for developing a project to trial a CSF in your local region?
3. What are the specific steps and necessities that need to be undertaken to implement and trial a CSF in your region? How could you achieve this?
4. Are there any other concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship?

The following section provides information on each of the locations visited and discussions at the workshops and meetings:

LAKES AND COORONG FISHERY WORKSHOP – TUESDAY 20 JUNE 2017

This workshop was attended by net licence holders in the Lakes and Coorong Fishery. The LCF has an important history in South Australia, as it was a key contributor in providing fresh fish for the new colony and was significant to the development of regional towns in the Lakes and Coorong region and an important component of the community. However, over the last 30 years, with the development of other commercial fisheries and easy access of fish at supermarkets in regional towns, the demand and reliance of locally caught fish from the LCF has significantly reduced. In addition to this, the social licence to operate a fishing licence has significantly changed overtime. Commercial fishers identified that after the River Fishery was restructured and licences holders were removed that they needed to reconnect to the local community and supply fresh fish to ensure they too were not removed.

The workshop was held at the property of Tracy and Glenn Hill, two commercial fishers who have supported the seafood movement in the broader Lakes and Coorong region. Tracey and Glen are well known within the South Australia community for their innovative marketing strategies such as their 'Coorong Wild Seafood' brand and have created niche markets for their fresh fish products. Tracey and Glen travel large kilometers to deliver fresh fish to farmers markets, local supermarkets and up market restaurants in Adelaide. Tracey and Glen are supportive of the CSF concept, however are skeptical that broader industry would be as enthusiastic.

Figure 6: Glen and Tracey Hill's modified home for seafood tourism. Glen Hill selling their seafood at a local farmers market.



Dr Stoll provided a presentation as to the history and issues that small commercial fisheries were dealing with in North America and how the direct marketing and development of the CSF concept had emerged. This presentation then led into a workshop that focused on the following key questions:

1. What are the key issues/challenges in the fishery?

- Commercial fishers identified after the River Fishery was restructured and licences holders removed that they needed to connect to the community and supply fresh fish to ensure they were not removed.
- Commercial fishers felt that they were not receiving a fair price for fish in the various fish markets that they supplied and this was exacerbated by competition between fishers.
- Commercial fishers are competing against each other for the best price. This can be compromised by fishers who do not always provide the best quality fish.
- The LCF has limited access to secondary species.
- Adelaide, Sydney and Melbourne fish markets are driving the prices for the fish.
- Increases in licence fees, boats, equipment and fuel and fluctuations in fish prices makes it difficult to build your business.
- Fishery regulations prohibit a constant supply of fresh fish.

- Reactive regulatory adjustments that create uncertainty regarding the long-term direction of the fishery.
- Long nosed fur seals are significantly impacting the fishery environmentally and economically.
- Continual issues with logistics and providing fish to the market.
- Competition with imports.
- Continual negative public perception and mistrust about the fishery.

2. What are the opportunities for developing a project to trial a CSF in your local region?

- Improve and maintain relationships with local commercial fishers. This will lead to working together to maintain price, quality of fish and improve logistics for supplying fish.
- Diversifying the product for consumers (i.e. fresh whole fish, fillets, mince)
- Selling fish to numerous different markets (i.e. local Schools, farmers markets, charities, local cafes, hospitals).
- Developing a marketing strategy which includes fishers to re-build relationships and connections with the community.
- Using different marketing opportunities:
 - T.V. programs such as The Briefcase, Seafood channel, Master Chef.
- MSC branding and promotion.
- Selling the concept of CSFs to local commercial fishers and case studies of successful businesses.

3. What are the specific steps and necessities that need to be undertaken to implement and trial a CSF in your region? How could you achieve this?

- Formation of a working group with licence holders from the LCF to support development of the following:
 - a. A novel marketing strategy that will include:
 - i. Key messages about the LCF
 - ii. Development of key educational videos about the fishery (i.e. the fisher's story)
 - b. Connecting with the community through selling locally caught fish through:
 1. Farmers markets
 2. Restaurants
 3. Community centres – schools, charities, local cafes, restaurants
 - c. Support the development of an online platform for the CSF concept.
 - d. Development of a business model to provide a platform for shares.

4. Are there any other concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship?

None

LAKES AND COORONG FISHERY WORKSHOP – TUESDAY 20 JUNE 2017

This workshop was held at the Goolwa PipiCo factory in Port Elliot with commercial fishers who harvest Pipi from the local Coorong beaches. Goolwa PipiCo is well advanced in building its community support and have been innovative in its marketing of Pipi. Goolwa Pipico have developed packaging that can extend the life and freshness of a Pipi, which has significantly expanded their markets and are now able to sell these on its online marketing platform and throughout numerous supermarkets in Australia. PipiCo has built an important connection with the local community through promoting and selling Papis to local restaurants, cafes and fish and chip shops and have hired a local chef to sell Papis on a bike during the summer months.

Figure 7: Olaf Hansen cooking papis on the Pipi barbeque in Goolwa SA. Goolwa PipiCo Pipi packaging.



Dr Stoll provided a presentation as to the history and issues that small commercial fisheries were dealing with in North America and how the direct marketing and development of CSF concept had emerged. This presentation then led into a workshop that focused on the following key questions:

1. Key issues/challenges in the fishery?

- Continuation of building trust in the community regarding the sustainability of the Pipi Fishery.
- Maintaining a stable market price. Some days you can receive a high price and other days a low price, this may also depend on other clam shells entering the market.
- Company ownership to allow flexibility for business decisions and expansion of the Pipi fishery.
- Connecting with the community and being able to sell Pipi through electronic means such as apps.
- Current constraints of regulations and meeting demands of consumers through selling smaller Papis.
- Competition and access to the Pipi resource.

- Expansion of the Pipi factory to supply fresh Pipi to the consumers.
 - Other clamshells supplying the market.
- 2. The opportunities for developing a project to trial a CSF in their local region?**
- Goolwa Pipico support the concept of the CSF through the development of an app that connects the commercial fisher with the consumer.
 - It will improve and maintain relationships with local fisher. This will lead to working together to maintain price, quality of fish and improve logistics for supplying fish.
 - Continual diversification of the Pipi product for consumers (smoked Pipi, pickled Pipi, etc.).
 - Using different marketing opportunities:
 - T.V. programs such as The Briefcase, Seafood channel, Master Chef.
 - MSC branding and promotion.
- 3. The specific steps and necessities to implement and trial a CSF in their local region?**
- Development of online platform and app to support CSF concept.
- 4. Any other concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship?**

None.

MARINE SCALEFISH FISHERY - WEDNESDAY 21 JUNE 2017

This workshop was attended by licence holders in the MSF. The MSF has an important history in South Australia providing fresh fish for settlers during colonisation and was also an essential element in the development of South Australia's coastal regions. However, over the last 30 years, the development of other commercial fisheries, aquaculture and imported fish has resulted in fish substitutes being available to local consumers at lower prices. Consequently, fish caught in the MSF are no longer an essential staple to the local consumer and therefore the reliance on the MSF has declined.

The social licence to fish has also significantly changed overtime. The MSF stocks are a common property resource, owned by the South Australian community, who have empowered the government of the day, to manage for them on their behalf. It is understood that in the early days of the MSF, there was little concern/knowledge for the social licence to fish, however, in more recent times, the MSF has been subject to public scrutiny for a range of matters including fishing intensity, bycatch, fishing practices, interactions with protected species and resource sharing/access conflicts.

The MSF contributes to the social, environmental, economic and heritage values of various fishing regions around the state, through involvement in community supported activities and contribution to the provision, maintenance and expansion of local and regional services (Econsearch 2017). The MSF has recently developed an online platform known as Seasonality South Australia to provide information to consumers about the availability of fish in each of the different seasons, where they are caught, the commercial fishers who caught them and recipes for each of the species. The following information presents a discussion with the licence holders in the MSF:

1. Key issues/challenges in the fishery?

- Limited education is provided to the community when selling fish. There needs to be more information and connection with the community, in particular Adelaide.
- Further work is required in educating the community.
- Commercial fishers are seen as the 'bad guys', not as a fisher who sells fresh fish to the community and requires a sustainable fishery for my future.
- Commercial fishers are losing their identity as the provider of fresh fish.
- Commercial fishers always consider providing local community first before the markets.
- Adelaide, Sydney and Melbourne fish markets are driving the prices for the fish and on most cases at a low price.
- Adelaide, Sydney and Melbourne are seen as the central location for providing fish to the consumer.
- Improving the value of secondary species such as Snook and Stripped Trumpter.
- Community have the idea that the fishing equipment we use are 'walls of destruction or environmental vandalism' and kills everything in its path i.e. the main reason why we have no fish and seaweed in local areas.
- Increases in licence fees, boats, equipment and fuel and fluctuations in fish prices makes it difficult to build your business.
- Fishery regulations are complex and in some instances prohibitive for providing a constant supply of fresh fish. Over regulated.
- Reactive regulatory adjustments that create uncertainty regarding the long-term direction of the fishery.
- Logistics of supplying fresh fish is a constant problem.

- Access to fish stocks is depleting; continual closures from netting closures in 2005 to more recent closures through Marine Parks. This is creating situations where commercial fishers are fighting for locations to fish.
- Poor profits from the fishery.
- Pollution has and is impacting on the environment.
- Too many licences in the fishery that are affecting stock status of key fish species.
- Increased conflict both within and between the commercial and recreational sector.
- Aging fleet and leasing of licences.
- There are numerous issues in the fishery and we need something different to support the fishery.

2. The opportunities for developing a project to trial a CSF in their local region?

- Licence holders, Marine Scalefish Net Association and MFA to work with Wildcatch Fisheries SA to develop and trial a CSF in the region.
- Improve and maintain relationships with local commercial fishers. This will lead to working together to maintain price, quality of fish and improve logistics for supplying fish.
- Reconnecting with communities through selling fresh fish off the boat, farmers markets.
- Improve and maintain relationships with local café, fish and chip shops, restaurants and local tourism for providing seafood through holiday packages etc.
- Reconnect with community through different marketing opportunities:
 - T.V.
 - Facebook, twitter, etc.
 - Development of videos of commercial fishers from across the region, showcasing the use of equipment and environmental stewardship of the resource.
 - Providing key information about commercial fishing in the region to community centres, Schools, charities, local cafes and restaurants.

3. The specific steps and necessities to implement and trial a CSF in their local region?

- Formation of a working group with the broader MSF to build community support through the following steps:
 - a. Develop and build better relationships amongst commercial fishers.
 - b. A marketing strategy that will include:
 - i. Key messages about the MSF.
 - ii. Development of key educational videos about the fishery i.e. the fisher's story.
 - iii. Development of key information about commercial fishing in South Australia and dispel the truths about commercial fishing gear.
 - c. Support towards further connecting with the community through:
 1. Off the boat sales
 2. Farmers markets
 3. Restaurants
 4. Community centres – schools, charities, local cafes, restaurants

- d. Seek funding to support development of key marketing strategies and the CSF concept.
- e. Development of online platform and app to support CSF concept.
- f. Development of a business model to provide a platform for shares.

4. Any other concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship?

None

SOUTH AUSTRALIAN FISHERMAN'S CO-OPERATIVE LIMITED - WEDNESDAY 21 JUNE 2017

The South Australian Fisherman's Co-Operative Limited (SAFCOL) was founded in 1945 by a group of South Australian commercial fishers to sell their catch. Today, SAFCOL continues to manage the South Australian Fish Market and is a diversified consumer products group, marketing its products across the Australian Retail Market in supermarkets and other specialty stores. SAFCOL is one of the world's major suppliers of fresh, packaged and frozen seafood. They are respected for a philosophy of sustainability and guarantee of quality. They have over 70 years experience, from traditional beginnings to the operation of fleets and plants around the world.

SAFCOL operate every weekday morning and are supplied with fresh fish from commercial fishers located around the South Australian coastline. SAFCOL representatives each weekday morning auction each of the commercial fisher's fresh catch to fishmongers, retailers and wholesalers for the local, domestic and export fish markets.

The visit to the SAFCOL market with Dr Stoll provided an insight into the daily operations of SAFCOL, in particular the auctioning of the fresh local catch. There was a variety of fresh fish being auctioned in the SAFCOL market from all over the state. On the day of visit, the auction prices for key species such as King George Whiting, Snapper, Garfish and Calamari were low (\$10 to \$15 per/kg) compared to the sale price of known local retail and restaurant prices. This was also the case for secondary species such as Australian Herring, Yelloweye Mullet and Snook (\$5 to \$8 per/kg).

Figure 8: SAFCOL fish markets.



Source: www.safcol.com.au

MYERS SEAFOOD - THURSDAY 22 JUNE 2017

Myers Seafood is located in Port Lincoln on the Eyre Peninsula, South Australia. Port Lincoln is known as the largest fishing port in South Australia. Previously, Mr Gavin Wise of Myers Seafood was a processor and retailer of mostly mussels, but has change his business to capitalise on the diverse variety of fish species available on the Eyre Peninsula. Mr Wise has begun structuring his business around the diversity and seasonality of local catch and stated that Port Licoln is the biggest fishing Port in South Australia, yet there are so many fish species on the Eyre Peninsula that are undervalued and could be utilised. Mr Wise indicated that the success of his business is built around the relationships with local commercial fishers and are key to the success and understands that without local commercial fishers there would be no supply of local fresh fish and no commercial fishers to supply them.

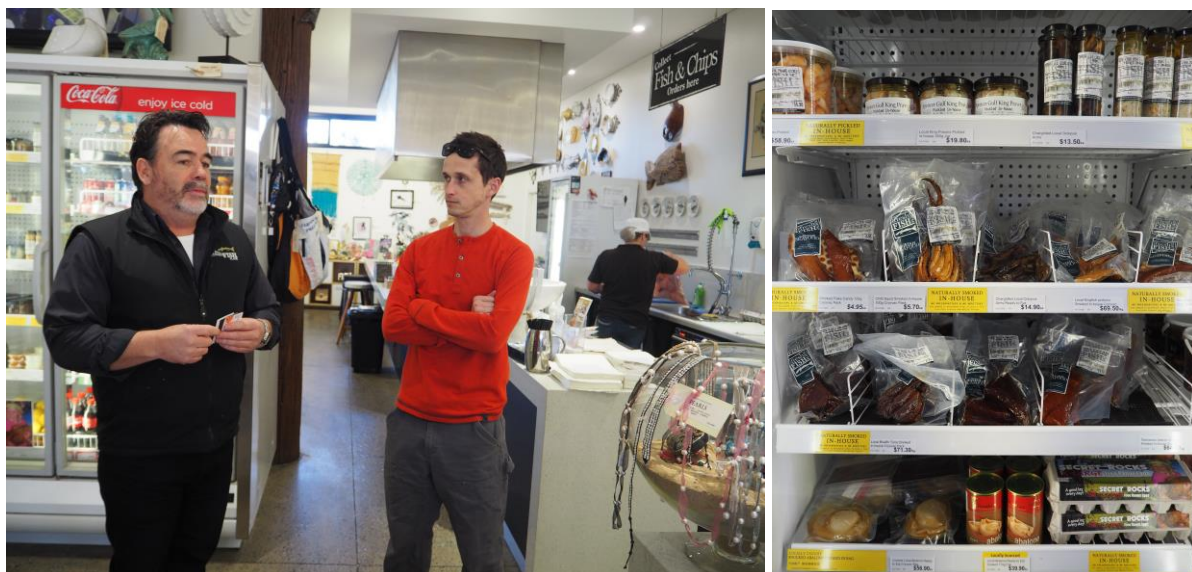
THE FRESH FISH PLACE – THURSDAY 22 JUNE 2017

The Fresh Fish Place is a well-known family owned company in Port Lincoln. The family owned company was established in 2000 and has grown to be one of the largest supplier of seafood in the region. Mr Craig McCathie, Managing Director of the Fresh Fish Place provided us with an insight into the running of the business. Mr McCathie explained that his business provides a processing facility, which includes local seafood products such as local finfish species, Squid and Shellfish. This facility supplies the region’s restaurants, hotels, clubs and fish shops. The Fresh Fish Place, which is a direct retail outlet provides fresh seafood to the public along with factory tours and tastings for the tourist market and also includes a cooking school facility.

Mr McCathie indicated that he has built his business around forming strong relationships with local commercial fishers and has spent significant funds on numerous marketing strategies to support his business and to understand the needs of the consumer. As a result, The Fresh Fish Shop has a range of different packaging available, which includes information about how to cook the fish, what ingredients to use, how many people the product will feed and the location of where the fish were harvested.

Mr McCathie highlighted the importance of the local commercial fishers and highlighted that without them he would not have a successful business.

Figure 9: The Fresh Fish Shop and Mr McCathie explaining his business.



WILDCATCH FISHERIES SA - FRIDAY 23 JUNE 2017

Wildcatch Fisheries SA is the peak Association for all commercial fisheries in South Australia. Wildcatch Fisheries SA seeks to unite, promote and protect the interests of South Australia's seafood producing families by developing policies and strategies at a State and National level that secure the long term future of the commercial fishing industry. Wildcatch Fisheries SA provides representation that delivers leadership and recognition to its members and the commercial fishing industry. Wildcatch Fisheries SA shares knowledge and information with key and national organisations and our members to enhance networks, business certainty and the profile of the industry.

1. Key issues/challenges in South Australian Fisheries?

- Lack of communication and cooperation between commercial fishers, reluctance of fishers to work together and across different fisheries.
- Co-operation (suspicion) trying to get commercial fishers to supply at a reasonable price. Commercial fishers are competing against each other for the best price.
- Lack of communication with the consumer and therefore not well informed.
- Increased conflict with the recreational sector, including increasing recreational fishing pressure.
- Access security and continued loss of access through Marine Parks, netting closures, development.
- The continual changes in export and beach prices for fish.
- Logistics of supplying fish to consumers.
- Lack of community acceptance/ support for commercial fishers – Community perception, trust.
- Erosion of social licence to fish.
- Political interference on decisions.
- Timely delivery of scientific information.
- Uncertainty on how government will manage allocations – our access.
- Reactive regulatory adjustments that create uncertainty regarding the long-term direction of the fishery.
- Overcapacity across a number of commercial fisheries.
- Policing and enforcement of various rules. Not enough compliance officers to enforce all arrangements.
- Reliable workers and uncertainty for supply fresh fish.
- Status of stocks, not much around and limited to certain areas.
- Low appreciation value of secondary species.

2. The opportunities for developing a project to trial a CSF?

- Commercial fishers to work together with Wildcatch Fisheries to develop and trial a CSF in Adelaide and the regions.
- The commercial sector and the community could work together to become champions of the resource.
- Key messages could be developed to provide information about the commercial fishery to ensure the community understand that industry needs sustainable resources to have a future.

- Connecting with the community:
 1. Off the boat
 2. Farmers markets
 3. Restaurants
 4. Community centres – schools, charities, local cafes, restaurants
- Funding opportunities to support the CSF concept.

3. The specific steps and necessities to implement and trial a CSF in their local region?

- Formation of a working group to build community support for the South Australian commercial fishing sector including the following:
 - a. A major seafood event that provides a connection between commercial fishers and the community.
 - b. An event that brings commercial fishers together to discuss the CSF concept.
 - c. A novel marketing strategy that will include:
 - i. Key messages about the commercial fishing industry in South Australia.
 - ii. Development of key educational videos about the fishery i.e. the fisher's story, the gear they use, stewards of the resource, commercial fishers need fish to have a future.
 - iii. Development of key information about commercial fishing in South Australia and dispel the truths about commercial fishing gear.
 - d. Seek funding to support development of key marketing strategies and the CSF concept.
 - e. Development of an online platform and app to support CSF concept.
 - f. Development of a business model to provide a platform for shares.

4. Any other concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship?

- The opportunities for developing a CSF would provide certainty, jobs and growth, vibrant industry.
- Would enable better and more informed decision-making.
- An industry that provides certainty.
- Linking food production to end user.
- Informing the public about the commercial fishing industry.
- Commercial fishers will be the price makers and not takers.

PORT ADELAIDE CSF SEMINAR – FRIDAY 23 JUNE 2017

A CSF seminar was organised in Port Adelaide to provide the broader South Australian commercial fishing industry with an opportunity to understand the concept of a CSF and to ask questions. It also provided for Dr Stoll to present on the learnings from the week trip across South Australia meeting with commercial fishers. The following provides a summary:

1. There are commercial fishers who have invested and experimented in the fishery and are receiving good economical return for their efforts, but for a majority of the licence holders in the fishery they are finding it hard financially.
2. The commercial fishing industry in South Australia is diverse and there are numerous challenges and opportunities. There are numerous species that could be used through a CSF.
3. Change is happening in the commercial fishery, whether it be socially, economically, ecologically or politically.
4. The seafood in South Australia has a reputation of being the best in the world and this offers huge potential to market and provide an improved value for fish.
5. There is an undervaluation of species through the local markets. The concept of ‘Boat to Folk’ can provide significant returns to commercial fishers in South Australia.

The key underlying element that Dr Stoll raised for South Australian commercial fishers is the need to build public support for commercial fishing. This support is important for sustainable fishing businesses, which can lead to sustainable fish stocks. In addition to this, it needs to be collaborative and both the commercial fishers and government need to work together.

BOWDEN CSF SEMINAR – 26 APRIL 2018

A CSF seminar was organised in Bowden, South Australia to provide the broader South Australian commercial fishing industry with an opportunity to understand the concept of a CSF and to ask questions. This seminar included a presentation from Mr Tom Cosentino about a CSF, Mr Bart Butson and Ms Karen Holder on the history of their fishing business, the challenges their businesses are and have faced and how a CSF could further support their business, but also to strengthen their social licence to fish (see Appendix 3, 4 and 5 for their presentations). The seminar also included a local well-known local chef Oliver Edwards discussing the importance of connecting with local commercial fishers to restaurants to provide seafood consumers with local fresh fish.

SUMMARY OF WORKSHOPS AND MEETINGS

It was evident from the workshops and meetings that the LCF and MSF have an important history in South Australia providing fresh fish for settlers during colonisation and were also an essential element in the development of South Australia's coastal regions. However, over the last 30 years, the development of other commercial fisheries, aquaculture and imported fish has resulted in fish substitutes being available to local consumers at lower prices. As a consequent, commercial fishers understand that fish caught in the MSF are no longer an essential staple to the local consumer and therefore the reliance on the LCF and MSF caught fish has declined. In addition, the changing parameters of the social licence to fish is compromising their capacity to catch and sell fish and commercial fishers acknowledged that they require a different approach to engage with the community to sell their fish.

Overall, the CSF concept was well received by licence holders as they recognised the diverse fishing landscape and the opportunities it can provide and these have been summarised below. There were commercial fishers who questioned the concept and how it would support their fishing businesses. The following provides a synthesis of the workshops, meetings and discussions for trialing a CSF in South Australia.

The key issues and challenges facing the South Australian fishing industry that were raised at workshops and meetings, included:

- Negative public perception and mistrust of commercial fisheries.
- Increased conflict both within and between the commercial and recreational sector.
- Limited education provided to the community when selling fish and the need for more information and connection with the community.
- Lack of consideration given to the seafood consumer.
- Commercial fishers not receiving a fair price for fish in the various fish markets that they supply, which is exacerbated by competition between commercial fishers and imports.
- Issues with the supply chain and the product being received by the consumer.
- Fishery regulations impeding a constant supply of fresh fish and restricting access to secondary species.
- Reactive regulatory adjustments creating uncertainty regarding the long-term direction of the fishery.

The main opportunities raised for developing a project to trial a CSF at each workshop and meeting included:

- Licence holders and associations from MSF and LCF to work with Wildcatch Fisheries to develop and trial a CSF in the region.
- Improve and maintain relationships with local commercial fishers. This will lead to working together to maintain price, quality of fish and improve logistics for supplying fish.
- Reconnecting with communities through selling fresh fish off the boat, farmers markets.
- Improve and maintain relationships with local café, fish and chip shops, restaurants and local tourism for providing seafood through holiday packages etc.
- Reconnect with community through different marketing opportunities:
 - T.V.
 - Facebook, twitter, etc.
 - Development of videos of fisher from across the region, showcasing the use of equipment and environmental stewardship of the resource.

- Providing key information about commercial fishing in the region to community centres, schools, charities, local cafes and restaurants.

The specific steps and necessities to implement and trial a CSF in their local region raised at the workshops and meetings included:

- Formation of a working group to build community support for the South Australian commercial fishing sector including the following:
 - a. A major seafood event that provides a connection between commercial fishers and the community.
 - b. An event that brings commercial fishers together to discuss the CSF concept.
 - c. A novel marketing strategy that will include:
 - i. Key messages about the commercial fishing industry in South Australia.
 - ii. Development of key educational videos about the fishery i.e. the fisher's story, the gear they use, stewards of the resource, commercial fishers need fish to have a future.
 - iii. Development of key information about commercial fishing in South Australia and dispel the truths about commercial fishing gear.
 - d. Seek funding to support development of key marketing strategies and the CSF concept.
 - e. Development of an online platform and app to support CSF concept.
 - f. Development of a business model to provide a platform for shares.

The concepts to further support fostering economic opportunities, cultivate healthy communities and encourage environmental stewardship discussed at the workshops and meetings included:

- There was no further concepts raised at the meetings or workshops.

Discussion/Conclusion

The workshops held with commercial fishers in the LCF and MSF, members of Wildcatch Fisheries SA, the meetings with the fish markets and seminars provided clarity of the issues being faced. It was evident through these discussions that there are commercial fishers who have invested and experimented with different business models in the fishery to address the identified challenges and are receiving good economic returns for their efforts, but many licence holders are suffering financially to keep their fishing businesses afloat. It was also evident that the industry needs to make changes to keep pace with the changing social, economic, ecological and political landscape and there are numerous key issues that are required to be addressed, including:

- Negative public perception and mistrust of commercial fisheries.
- Increased conflict both within and between the commercial and recreational sector.
- Limited education provided to the community when selling fish and the need for more information and connection with the community.
- Lack of consideration given to the seafood consumer.
- Commercial fishers not receiving a fair price for fish in the various fish markets that they supply, which is exacerbated by competition between commercial fishers and imports.
- Issues with the supply chain and the product being received by the consumer.
- Fishery regulations impeding a constant supply of fresh fish and restricting access to secondary species.
- Reactive regulatory adjustments creating uncertainty regarding the long-term direction of the fishery.

With the support of Dr Stoll through the workshops and meetings, there were many opportunities discussed to address these challenges. The most important need identified was to build the support of the community through the novel marketing and delivery strategies developed in North America such as a CSF, Off-the-boat sales, fisher's/farmers' markets, restaurant supported fisheries, boat-to-institutions, and online sales.

Dr Stoll indicated the implementation of a CSF is complex and requires a project team to support the communication, promotion and sales, website and app development and maintenance, education and outreach, accounting, processing, transportation, fishing, and pick up coordination. A fundamental element of a CSF is to understand the needs of the seafood consuming public and their willingness to pay for fresh fish. Dr Stoll also indicated a critical element to any marketing and delivery strategy was to undertake a survey to understand this part of the community.

The next steps that have been identified to build community support in South Australia for commercial fishers, include:

- A survey of the South Australian public to understand their needs for consuming seafood, such as products (e.g. species and processing), prices, and availability/delivery.
- Developing novel local and direct marketing and distribution strategies to improve community support for commercial fishing in South Australia, including:
 - Improving the supply chain – 'Boat to Plate' or the CSF concept.
 - Providing opportunities to sell locally through fresh fish sales off the boat, farmers markets, community centres, schools, charities, fish and chip shops, local cafes, restaurants and online marketing.
 - Directly engaging with the consumer and telling commercial fishers' stories.

- Development of key messages about the South Australian commercial fishing industry.
 - Development of videos of commercial fishers from across the region, showcasing each fisher's story i.e. reasons why they are fisher, purpose of being part of a community, showing the use of fishing equipment and explaining environmental stewardship of the resource.
 - Development of recipe cards (especially for underutilised or lesser known species) for when fish are sold and include key information such as the species' status classification, where and how the fish were caught and management arrangements.
 - Opportunities in local tourism for providing seafood through holiday packages.
 - Development of a major seafood event(s) that connects commercial fishers and the community.
- Improve and maintain relationships between commercial fishers and PIRSA, including working together cooperatively.
 - Form a dedicated working group of commercial fishers to support the trial of a CSF in Adelaide.

This project also recognised that the commercial fishing industry in South Australia is diverse and there are numerous opportunities to be realised. South Australian seafood has a reputation of being the 'best in the world' and this offers huge potential to market the premium quality products available and maximise its value. There are numerous key and underutilised fish or lesser known species in South Australia that are undervalued at the fish markets and by consumers and, as experience has shown in the Walking Fish Cooperative, a CSF can help to shift perceptions on high value vs. low value species.

The industry workshops also raised issues about fishery regulations inhibiting fishing businesses from expanding, creating uncertainty and restricting access to secondary species. Two key research projects are underway to investigate these issues, which are funded by FRDC and led by SARDI. The first project (FRDC 2017-014) aims to investigate and analyse the most suitable longer-term management framework for the MSF. The second project (FRDC 2017-023) will investigate the potential for enhanced production of underutilised or lesser known species that will identify potential barriers for sustainable expansion from the perspectives of the environment, economics, marketability and governance for secondary species in the fishery.

Underlying the issues being faced by commercial fishers is the critical need to build public support for the commercial fishing industry. This support is vital for sustainable fishing businesses, which are invested in the long-term sustainability of fish stocks, and make an important contribution to local regional communities. There is a need to develop novel marketing and delivery strategies to rebuild the connection with the consumer and inform consumers of the role commercial fishers play in supplying quality fresh seafood and providing stewardship in sustainable fisheries management.

Finally, at the conclusion of this project it was announced that Wildcatch Fisheries SA were successful in receiving Australian Government funding to support a trial of a CSF in Adelaide, which included a dedicated project manager to oversee its implementation. FRDC has also supported the trial of a CSF in Adelaide through providing funding towards a project (FRDC 2017-183) that investigated the use of modern software to connect with the seafood consumers. In addition to this funding, it is important the commercial fishing industry investigates and develops other marketing and delivery strategies to help build community support. An ongoing conversation between the peak body and commercial fishers is important to build understanding of the CSF concept and the many benefits available through supporting this initiative. To further support the CSF concept in the MSF and LCF, a brochure has been developed to engage and provide further guidance on how to implement a CSF.

Implications

The implementation of novel marketing and delivery strategies such as the CSF may provide an avenue for addressing the numerous issues currently being faced by commercial fishers in the LCF and MSF. The CSF concept is a model that enhances connections between fishers and consumers representing an inventive means of improving seafood sustainability, but also supporting to build the environmental, social and economic capacity of commercial fishers. There are many examples in North America of fishers reconnecting with their communities through novel marketing strategies.

Extension and Adoption

PIRSA will provide this report of the discussions and outcomes of the workshops and meetings to the Australian Fisheries Management Forum, fisheries management agencies and industry peak bodies in other jurisdictions. The outcomes of the project will also be extended to the broader fishing industry through the PIRSA website, via presentations at relevant events and at community and industry meetings.

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Appendix 1: Project Staff

- Mr Jonathan McPhail
- Dr Joshua Stoll
- Mr Nathan Bicknell
- Mr Neil MacDonald
- Ms Franca Romeo

Appendix 2: Mr Tom Cosentino's presentation



South Australia's Community Supported Fishery





<https://www.youtube.com/watch?v=XqCw4MmSrcw&t=3s>

about

Wildcatch Fisheries SA Inc...

- Represents **600 commercial license holders ...**
- from **10 professional fishing sectors...**
- that account for **every commercially caught species** in South Australia.
- Collaborates with **industry, government** and the **aquaculture** sector.



what a

CSF does...

- A **transparent chain of custody** from boats to plate
- Increased access to **premium, locally caught seafood**
- Fishers receive a **fair price** that reflects the value of their work
- **Engages the community** in a robust, viable local food system
- Cooperative **stewardship of marine resources**



the project

Deliverables...

- An **alternative business model** for fishermen to sell their produce to businesses and consumers
- An **education tool** that fosters sustainability awareness and enhances fishers' social license to operate
- A **unique online e-commerce platform** that allows consumers to purchase fish as it's being caught, opt out from seafood they do not want to receive and deliver recipes for the day's catch



this is

How it Works...

- Customers order a **share of the day's catch**...
- which is available for **pick-up or delivery**...
- and can be **whole or filleted**.
- You can **opt-out of types** of seafood
- ... and can even **skip deliveries**.
- Each share contains a **high value** and a **secondary** species...
- along with an **information brochure**: species fact card, wine & condiment pairings and suggested recipes.



why we need a

Community Supported Fishery...

- Fishers get a **fair price**...
- which means a **better margin**...
- on **all** species...
- so that they can **catch less** fish...
- and still have resources for **other farm gate projects** and **future generations**.



Wildcatch Fisheries SA Inc and Adelaide's Finest Supermarkets...



Fair Fish in the community...



thanks and

Acknowledgements...



margo consulting

Marketing. Grants. Operations.



Chartered Accountants
& Business Advisers



Appendix 3: Mr Bart Butson's presentation



Mr Bart Butson's presentation provided an insight to the changes to the commercial MSF, the challenges they are facing and the new novel marketing strategies they are trailing to reconnect with community.



Mr Rob Butson showing how times have changed in Port Waikfield. All boats are now placed in commercial fishers sheds.



Mr Rob Butson showing how boats and equipment have changed overtime, management of the fishery has changed and that sustainability of the net fishery is key to it survival.



A new relationship is forged, as Mr Bart Butson works with local chefs to promote local caught fresh fish in local supermarkets.



Mr Bart Butson supplying local fresh fish to Chianti, an upmarket restaurant in Adelaide.



Commercial MSF supplying underutilised species (Yellowfin Whiting) to restaurants across Adelaide.



Oliver
Edwards



Mr Oliver Edwards is a well-known local chef in Adelaide and a major supporter of buying fresh underutilised species from commercial MSF licence holders for seafood consumers.

Appendix 4: Ms Karen Holder's presentation



Karen
Holder



Mrs Karen Holder's presentation provided an insight into the development of the Blue Crab Fishery and how the CSF is an exciting concept.



Mrs Holder indicated that their fishing business was their family; they lived and breathed fishing including their backyard (seen above). This photo was taken 22 years ago when fishing was a valued aspect of primary production and food supply.



Mrs Holder explained change is the constant in the 21st Century and this picture, painted by Edouard Manet in 1869 titled Moonlight over the Port of Boulogne, illustrates an early version of a CSF and its importance to the community.



Mrs Holder indicated that they have worked hard over many years to build their brand and 2 Gulfs crab will supply product to the Community Supported Fishery and are excited by the prospect of working with the next phase of the project.

Appendix 5: CSF Brochure

Community Supported Fisheries

Information current as of November 2019
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This brochure will assist fishing businesses in understanding the fundamentals of starting their own CSF and step you through the basic of the model.

Community Supported Fisheries – A better way to sell your fish?

South Australia produces some of the most sought after premium seafood species in the world, from the iconic wild catch species such as King George Whiting and Snapper to Southern Rock Lobster, Greenlip Abalone and Western King Prawns. Harvested in pristine waters which have a reputation for being amongst the cleanest and safest, South Australian commercial fisheries have a lot to offer and there are numerous opportunities to expand fishing businesses through a Community Supported Fishery (CSF).

A CSF is an alternative business model for seafood harvesters that promotes community engagement and local consumption of their catch. The model relies on a direct connection with consumers that promotes transparency in the supply chain and helps to educate consumers about fishing families and practices, as well as where the seafood comes from and its sustainability status.

This model has been very successful in the United States and Canada where imported seafood is commonplace and consumers are missing the connection that they once had with their local fishing communities.

What a CSF offers

- A transparent chain of custody from boats to plate.
- Increases access to premium, locally caught seafood.
- Engagement with the community in a robust, viable local food system.
- Industry and community stewardship of marine resources.

Why you might need a CSF

- To receive a fair price on all species, which means a better margin and harvesting less fish to catch.
- To better engage with your local communities and improve the understanding of their needs
- To support fishing businesses to still have resources for value add projects and future generations.



Identifying if a CSF will work for you

The first step in determining the potential for developing a CSF, is identifying the problems in your business, your fishery or community. If they are:

- Is a lack of identity and social licence (do your consumers like buying from you because they know who you are)?
- Are low auction prices (are the prices you get reflective of the work you feel you do?)
- Is a convoluted route to market (are there so many people in the supply chain that your product loses its integrity?)

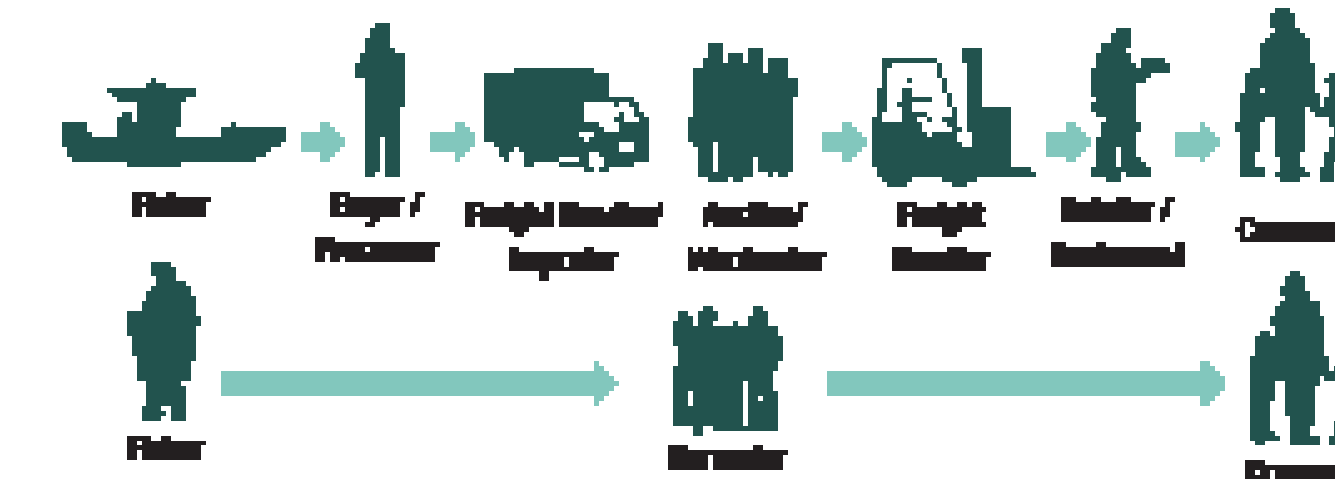
- Is no market for by-catch (do you have to target only key species?)

Then the Community Supported Fishery model might work for you.

Watch Movie

The fisherman in this short video tells his story and describes the issues that he is facing.

Scan QR Code to watch video or visit:
www.youtube.com/watch?v=XqCw4MmSrcw&t=3s



There are many stakeholders in the traditional supply chain, a CSF creates a more direct link between the fisher and end consumer.

Things to consider before starting

Several factors will need to be considered to assist in designing the right model for your business or fishery.

Direct marketing poses a number of challenges. It takes time and effort to develop a good business plan, secure the necessary business licences, manage the finances and paperwork, advertise the product, and recruit and retain customers. Your local industry association can help you do this.

Anyone considering launching a new business, or significantly changing their existing business, has a lot to think about. In developing a business plan, numerous questions need to be answered.

Develop a business plan

Your business plan should consider the following areas:

- Infrastructure (including landing wharf, processor, delivery truck)
- Species and form of seafood to be provided (whole fish or gilled, gutted and scaled or fillets?)
- Price of shares and payment structure (maybe you'll accept pre-payments from your community like they do in Alaska?)

- Deliveries (including policies about missed deliveries and missed pick-ups)?
- Legal requirements and regulations (maybe you'll need a processing licence add-on from your fisheries management agency)

- Effective marketing to attract sufficient shareholders – in particular, social media. This is a great, cost-effective way to target key audiences with messages that can be easily shared, extending the reach of your communication activities

- Outreach and education for the shareholders and the communities where the fish is to be delivered (lots of fishers know more about their product and their community than anybody else)

- Any start up funds that you might require.

Approach your industry association if you are considering starting a CSF as they may have resources or information that can assist you.

If you are comfortable in this area, consider employing professional services to help develop a business plan. Your industry association will have contacts that can provide these services. These might include accounting, legal or social media marketing services. Alternatively, templates can be found at www.business.gov.au/planning/templates-and-tools/marketing-plan-template-and-guide.



The basics – How to start a CSF

Starting a CSF	
Steps	Process
STEP 1 – Identify your problems	<ul style="list-style-type: none"> • Price? • Lack of community support? • No market for by-catch? • Convoluted route to market?
STEP 2 – Build you Unique Value proposition	<ul style="list-style-type: none"> • Tell YOUR story and give your product a platform. • Create engaging content about your business and fishery that you can use on social media and formal documents. What might seem average to you is really new and exciting for your community. • Take frequent and great photos and use them • Separate your CSF from your political identity. It will help consumers relate to the positive aspects of the fishing industry. Politics is better handled at the association level.
STEP 3 – Approach your customers	<ul style="list-style-type: none"> • Find markets • Meet with local chefs, catering companies, event organisers and farmers markets (these will come in handy down the track). • Establish more than a transactional relationship, and offer them your best product at a fair price for you. This stage can be profitable, but isn't purely a money-making exercise. • The kind of early adopting customers that get involved at this stage will become your champions – they also generally have wider social media reach than individuals.
STEP 4 – Select your distribution channels	<ul style="list-style-type: none"> • Set up your supply route or use and modify an existing one. Even if this means you driving the product directly to a consumer, it can be worth it. Maybe share the deliveries with a fellow fisherman. • Outsourcing freight is preferable to selling to a middle person. • Use a hub that additional customers can pick up from. The local grocery store is a great option. Your industry association can help facilitate this discussion.
STEP 5 – Build a framework	<ul style="list-style-type: none"> • Build a consumer base and pricing module for your Community Supported Fishery. • Continue to post social media content and create a relatable, interesting brand through compelling story-telling. • Develop a spreadsheet that allows your CSF to obtain a price and volume point for your regular parcels. Your industry association may have a template that will assist.
STEP 6 – Deliver the solution	<ul style="list-style-type: none"> • Establish a platform that allows customer payments, subscription management and real time messaging. • You can use a combination of a cheap online paywall or use Facebook and Instagram. • Conventional invoicing and EFT payments can also be considered. • If you need help with anything that is internet based, contact your industry association.



Resources





There are several resources that might help you visualise your Community Supported Fishery model.

Check out the Fair Fish SA Instagram page (@fairfishsa) to see what has been happening around South Australia. This will also give you an idea of who has been involved in the model in South Australia.

Call your local industry association or peak body. Wildcatch Fisheries SA Inc is the peak body for commercial fishers in South Australia.

The Food and Agriculture Organisation of the United Nations has supported the model. Search 'FAO Community Supported Fishery' online.

Some Community Supported Fisheries worth looking at:

	Fair Fish fairfishsa.com.au
	Skipper Otto skipperotto.com
	Sitka Salmon Shares sitkasalmonshares.com
	Real Good Fish realgoodfish.com



PIRSA

Community Supported Fisheries

A How-To Guide for sole traders, co-ops and partnerships to seize better prices for fish, sell your by-catch and connect with your community.

