

*This plan presents the strategic future for the Australian prawn farming industry.*

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AUSTRALIAN PRAWN FARMERS ASSOCIATION

# Strategic Plan

## 2020 - 2025

### & Priority Activities



AUSTRALIAN  
**Prawn  
Farmers**  
ASSOCIATION

Australian Prawn Farmers Association  
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**FRDC**  
FISHERIES RESEARCH &  
DEVELOPMENT CORPORATION

This Plan has been developed  
for industry by the APFA and  
the FRDC.

“

## Our mission

Represent the common interest of members and promote and support all aspects of the Australian prawn farming industry.

”

“

## Our vision

The Australian Prawn Farming Industry is resilient, prosperous, sustainable, cohesive and respected.

”



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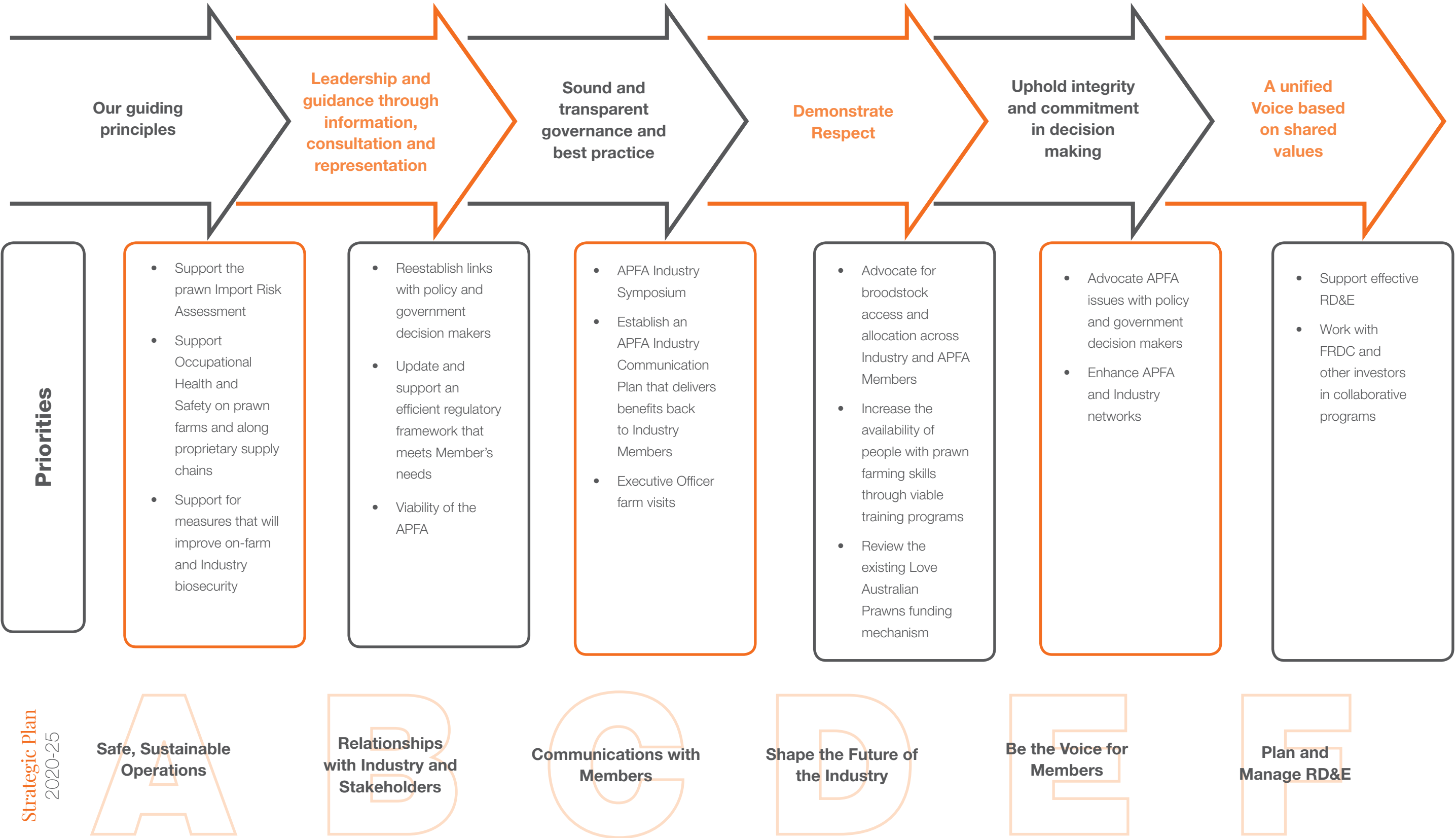
The Australian Prawn Farmers Association draws its members from the Australian prawn farming industry. Established in 1993, the association is led by a Management Committee elected by members. The Committee manages industry issues, risks and opportunities to achieve best outcomes for Members, subject to its constitution. The committee is supported by an executive staff, subcommittees and advisors.

This Strategic Plan was developed in 2019 by farmers, the APFA and the FRDC. The Plan positions the farmed prawn industry to make best advantage of its strategic and investment choices over the next 5 years.

# Strategic Plan

## 2020-2025

# Strategic Plan 2020-25



Aquaculture is a global business supplying 80 MMT of seafood to consumers annually. By 2030 an extra billion consumers will add 25 MMT (a 30% increase) to global seafood demand. With increasing demand for seafood and static supply from global wild fisheries. Global prawn supply totals 5.5 MMT and prawns are the second most traded species after salmonids, comprising 6.2% of live weight and 16 % of value.

# Strategic Framework

## 2020-2025



# Strategic Framework 2020-25

## Global Trends

- Rising demand for nutritious, safe seafood,
- Productivity driven by innovation – technologies, breeding, supply chains,
- Less farm or process waste,
- Better cool chains to market - especially serving Asia,
- Trade liberalisation and market knowledge has boosted supply but reduced consumer prices,
- Seafood substitution for beef, pork, lamb, poultry,
- Reduced use of fishmeal and fish oils in farm diets.

## Production Systems

- Disease & Biosecurity
- On-farm best practice
- Environmental sustainability certification
- Animal health and welfare
- Incident response plans
- Farm productivity optimisation
- Broodstock and domestication
- Farm viability
- Feed value proposition
- Energy optimisation

## Harvest & Processing

- Harvest optimisation
- Automation in supply chains
- Waste management
- Supply chain management

## DOMESTIC ISSUES AND DRIVERS

## Supply Chain & Market

- Consumer seafood choices
- Marketing and provenance
- Increase domestic demand for Australian farmed prawns
- Export market supply diverted to the domestic market
- Food service compliance

## Leadership, Governance & Capacity

- Social licence
- Government relations
- Human health and safety
- E-technologies and innovation
- Public awareness and education
- Leadership, education and skills
- Industry development and investment
- Advocacy and members' united voice
- Global trends, risks and opportunities
- Association communication and viability
- Industry collaboration, media & linkages

# APF SWOT 2020-25



## STRENGTHS

- High quality of R&D people and systems available to the industry
- United industry
- Prawn product has high consumer demand
- Australian *P. monodon* is differentiated from imported prawns
- Industry culture is respectful of all members and farms
- Willingness of members to share information
- Relatively low risk to industry related to its social license to operate



## WEAKNESSES

- Industry undervalues its economic contribution to regional and national economies and communities
- Lack of economic scale of the prawn farming industry
- Lack of industry awareness of regulatory compliance issues, and variability of this across licenceholders
- APFA to decide the regulatory levels and issues it will pursue
- Inability to attract financial capital
- Shortage of skilled employees
- Long lead times to access some farm equipment
- Lack of secure access to key farm inputs e.g. broodstock
- Lack of PL availability during optimal peak farm stocking demand
- Logistics barriers and inefficiencies e.g. PLs, cold storage



## OPPORTUNITIES

- Replace imported prawns with local farmed prawns
- Implement enhanced breeding and genetics
- Development and adoption of multiple technologies
- Secure access to the growth underway in local and global prawn markets
- Increase prawn per capita consumption in Australia
- Communicate with all farms re current and proposed industry changes
- Manage prawn farm industry growth based on members shared values



## THREATS

- Industry and APFA need better networks and contacts with governments, including politicians and bureaucrats
- Government regulatory framework and related barriers
- Unforeseen climate change on farms
- Biosecurity threats in farms and markets, including risks of introduced exotic pathogens
- Food fraud – substitution and food safety
- Ability to expand the industry subject to community endorsement and activists
- Lack of capacity (industry & APFA) and tools to implement change
- Lack of industry understanding of pathogens and risks
- Risk that APFA can not manage growth across industry
- OH&S risks for farm and supply chain workers

# Vision and Strategies

## 2020-2025

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## Industry Vision:

The Australian Prawn Farm Industry is resilient, prosperous, sustainable, cohesive, and respected.

## APFA Mission:

Represent the common interest of members and promote and support all aspects of the Australian Prawn Farming Industry.

## APFA Values:

- Leadership and guidance through information, consultation and representation
- Sound and transparent governance and best practice
- Demonstrate respect
- Uphold integrity and commitment in decision making
- A unified voice based on shared values

”



## Vision and Strategies 2020-25

# A

### SAFE, SUSTAINABLE OPERATIONS

The APFA will promote and encourage safe and sustainable prawn farming and supply chain operations

# B

### RELATIONSHIPS WITH INDUSTRY AND STAKEHOLDERS

The APFA will foster and expand relationships with industry, and collaboration with stakeholders and all levels of government

# C

### COMMUNICATION WITH MEMBERS

The APFA will provide effective communication with its Members on issues relevant to the Australian prawn farming industry

# D

### SHAPE THE FUTURE OF INDUSTRY

The APFA will engage in activities that shape the future of the Australian prawn farming industry

# E

### BE THE VOICE FOR MEMBERS

The APFA will be the voice representing its members

# F

### PLAN AND MANAGE RD&E

The APFA will oversee effective RD&E priorities funded by industry investment

## APFA Priorities

# A

### SAFE, SUSTAINABLE OPERATIONS

- Support the prawn Import Risk Assessment
- Occupational health and safety on prawn farms and along proprietary supply chains
- Support for measures that will improve on-farm and industry biosecurity

# B

### RELATIONSHIPS WITH INDUSTRY AND STAKEHOLDERS

- Reestablish links with policy and government decision makers
- Update and support an efficient regulatory framework that meets member needs
- Viability of the APFA

# C

### COMMUNICATION WITH MEMBERS

- APFA Industry Symposium
- Establish an APFA Industry Communication Plan that delivers benefits back to industry members
- Executive Officer farm visits

# D

### SHAPE THE FUTURE OF INDUSTRY

- Advocate for broodstock access and allocation across industry and APFA members
- Increase the availability of people with prawn farming skills through viable training programs
- Review the existing Love Australian Prawns funding mechanism

# E

### BE THE VOICE FOR MEMBERS

- Advocate APFA issues with policy and government decision makers
- Enhance APFA and Industry networks

# F

### PLAN AND MANAGE RD&E

- Support effective RD&E
- Work with FRDC and other investors in collaborative programs

Australia's farmed prawn industry has grown since it began in the 1980s.

Australian prawn farm investment and production is expected to expand significantly in the next five years, creating new jobs and benefits for regional communities.

Biosecurity risks from imported product and broodstock access are major challenges to industry growth.

Prawn farming in Australia is an emerging high value industry attracting large investor focus and high levels of Government support and promotion.

In 2019 the Australian prawn farm industry operated 23 active farm sites across Qld, NSW and NT and a number of larger farms are in greenfield development.

Over the next five years the industry intends to grow sales to \$500m and invest \$400m in capital expansion. The industry plans to make large investments in regional supply services, create over 1,200 new direct jobs and create over 3,000 indirect jobs through investments by suppliers, contractors and supporting local regional businesses.

Farm contribution to domestic prawn production has grown from 6% in 1995 to 18% in 2017. Current investment is expected to boost farm production to ~6,740 tonnes in 2020, and 28,000 tonnes in 2025. Farm share of production is expected to be more than 50% in 2025. This growth will service both export and domestic markets."

# Growth in Value

## 2020-2025



The APFA's Industry Partnership Agreement with FRDC and others targets modest precompetitive investments that are efficient, flexible and benefit all farmers. Advantages accruing to APFA Members include:

- Guaranteed access on prescribed terms to both industry contributions and government matching of contributions - the FRDC will allocate a budget to APFA priorities,
- Investment would be focused on the APFA Strategic Plan and outcomes, and driven by agreed indicators of success,
- Funding would be available for APFA for RD&E planning, implementation, extension and utilisation,
- A more flexible approach to the types of investment that can be made; and a quicker path from idea to contract,
- RD&E that can be linked to market outcomes (e.g. market research but not marketing itself),
- Ability to submit new project investments every 2-3 months,
- Final confirmation between APFA and FRDC regarding the source and use of industry and matched funds,
- Day-to-day management of industry participation, priorities and investment is in the hands of the APFA RD&E Committee,
- The committee's plans, decisions and outcomes are reviewed by the APFA Board and reported to members annually.

The APFA will seek other collaborative investment partnerships as part of this R&D Plan 2020-25, including:

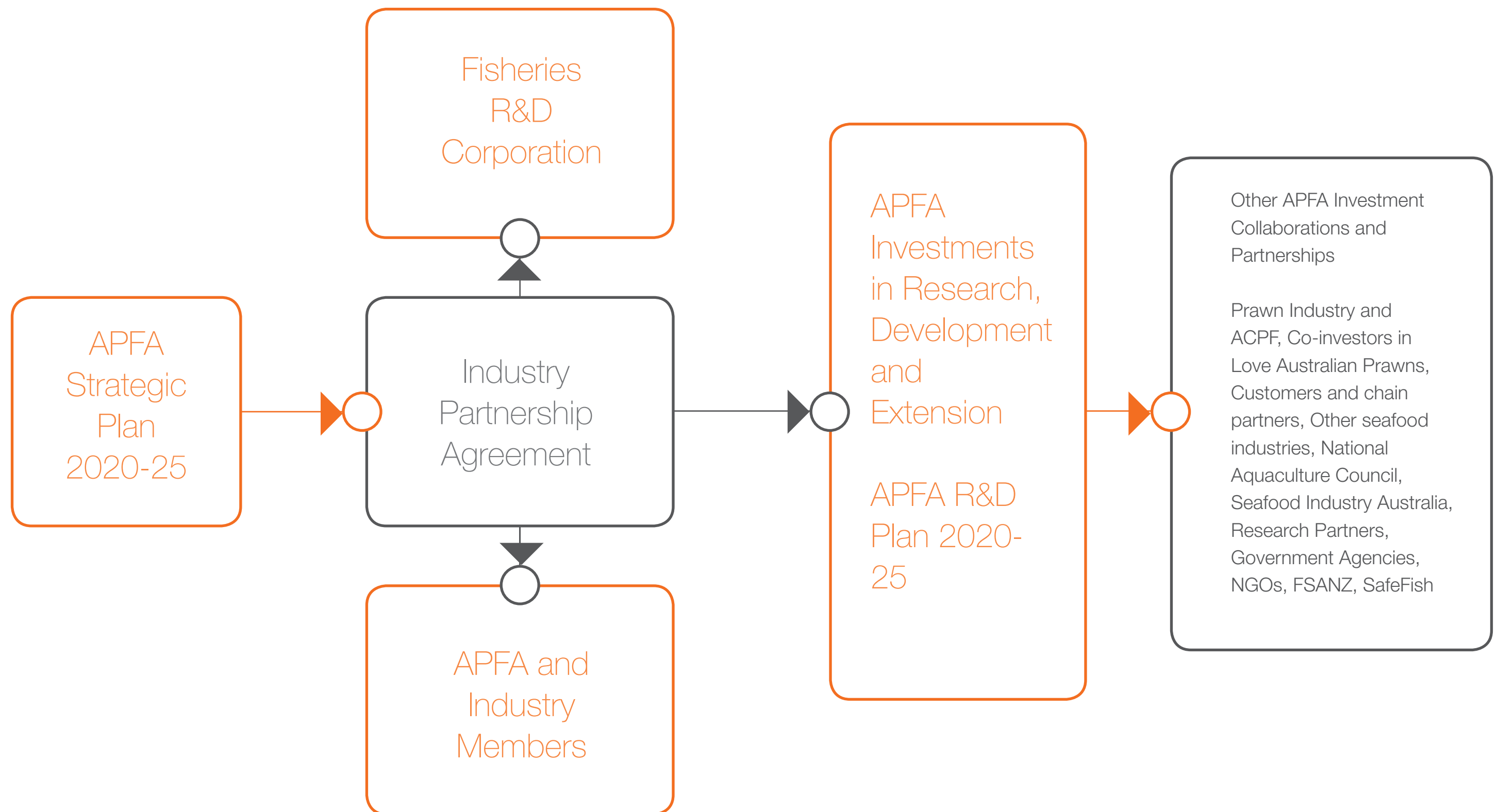
- Australian Council of Prawn Fisheries (ACPF),
- Co-investors in Love Australian Prawns and marketing,
- Supply chain, productivity and research partners,
- Other Australia seafood and aquaculture organisations,
- Customers and consumer organisations,
- Government agencies and authorities,
- Relevant Non-Government Organisations.

# Industry Investment

## 2020-2025



# Partnerships 2020-25





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