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# Australian wild BARRAMUNDI

Market Development Strategy Workshop  
November 2021



## Objectives

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To research the food service and hospitality sectors to gain insights to the barriers and drivers to demand for wild caught barramundi

To develop a draft wild caught barramundi market development and positioning strategy

# Today



TALK ABOUT RESOURCES NEEDED  
TO MEET QUALITY PARAMETERS



INPUT TO MARKET DEVELOPMENT  
AND POSITIONING STRATEGY



PRIORITISING NEXT STEPS

# Introduction to the strategy

This document outlines the suggested strategy and tactics needed for Australia's wild barramundi fishers, working as one industry across two state fisheries, to establish and grow the domestic food service market for Australian wild-caught barramundi.

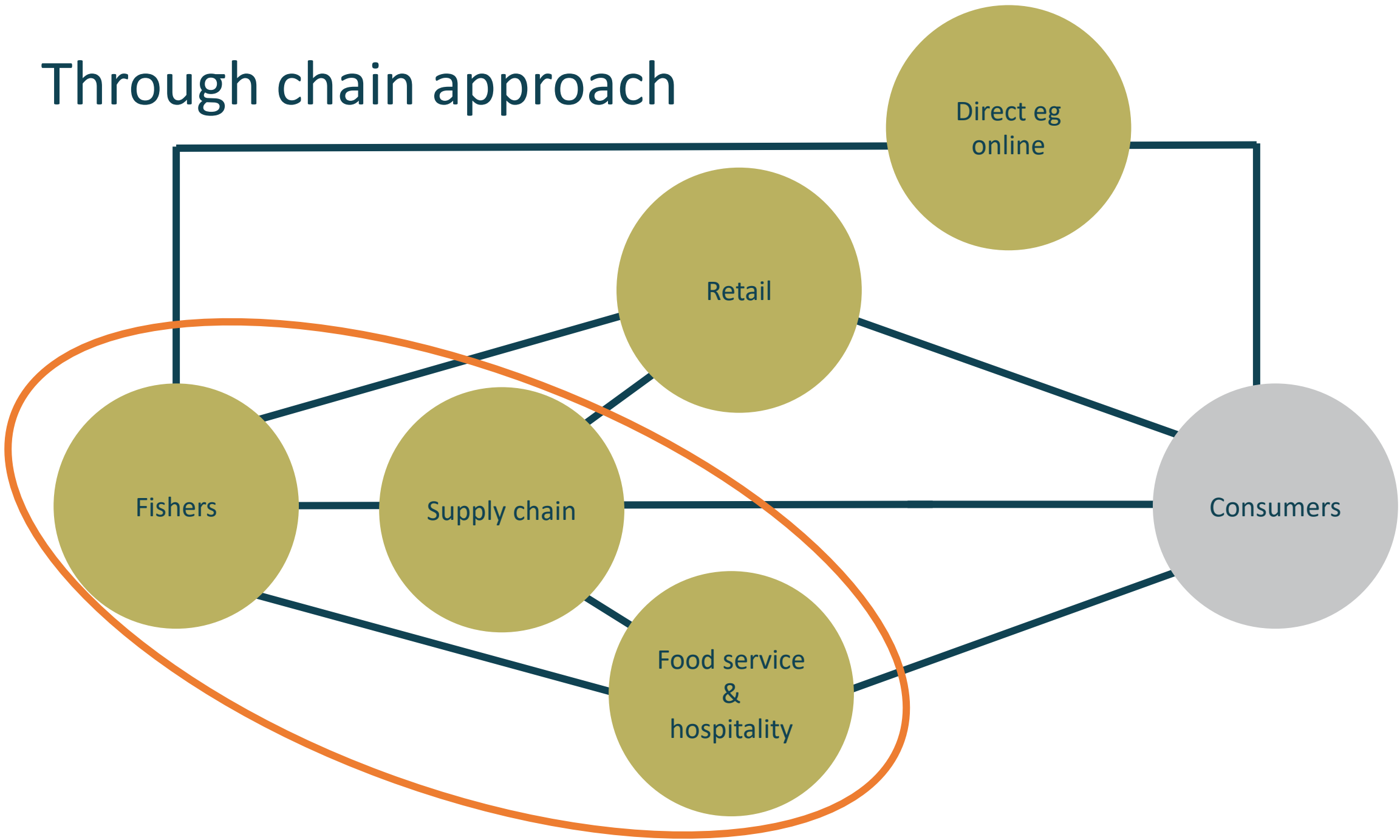
The strategy is based on research findings surveying over 100 people (chefs, wholesalers, distributors and fishers) to understand where and how to position the product in relation to competitors and by capitalising on what the market values.



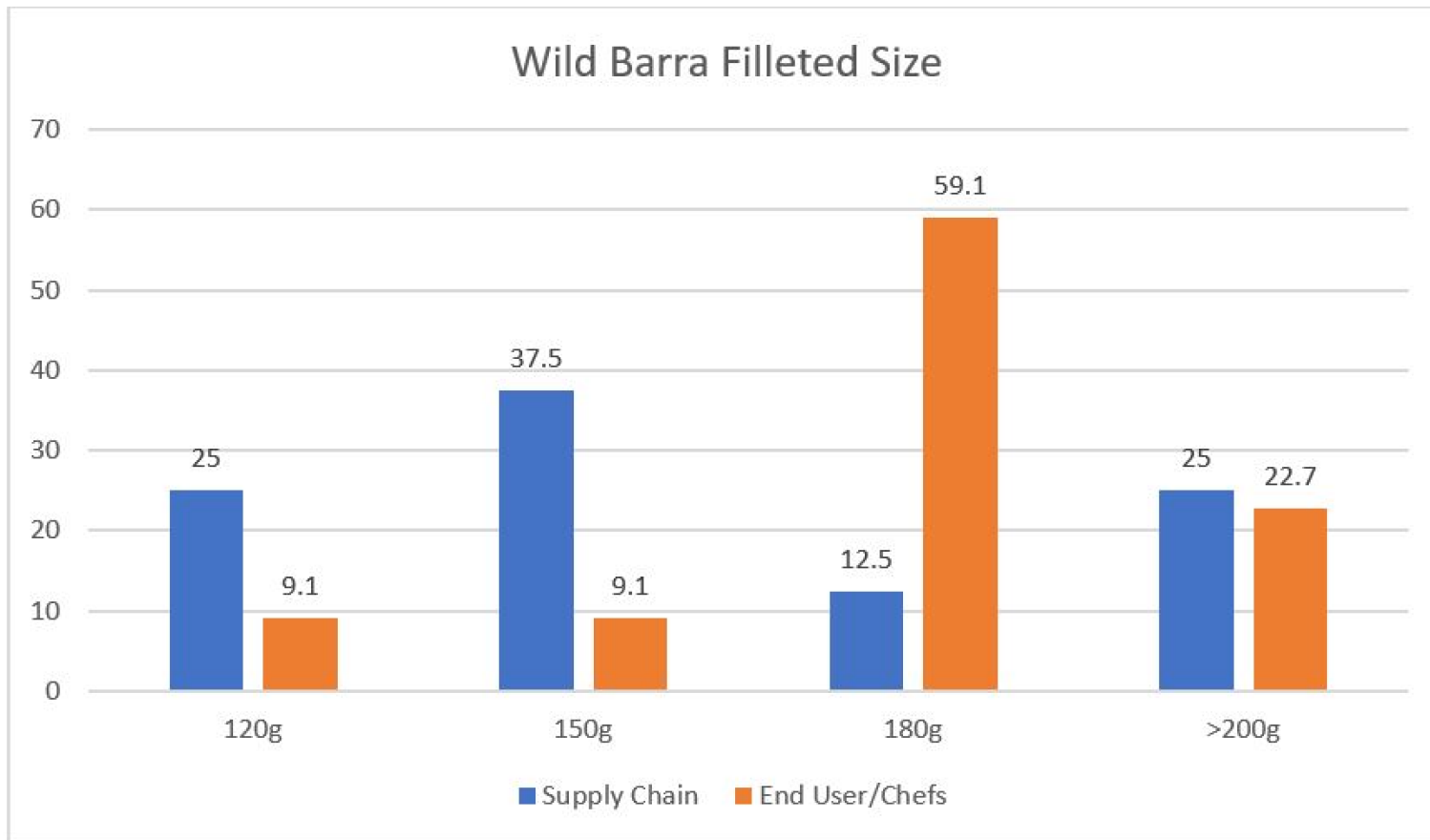
A man in a white chef's uniform and hat is shown from the chest up. He has a thoughtful expression, with his right hand resting on his chin and his gaze directed upwards and to the left. The background is a plain, light color.

# Research Summary

# Through chain approach



## Fillet size

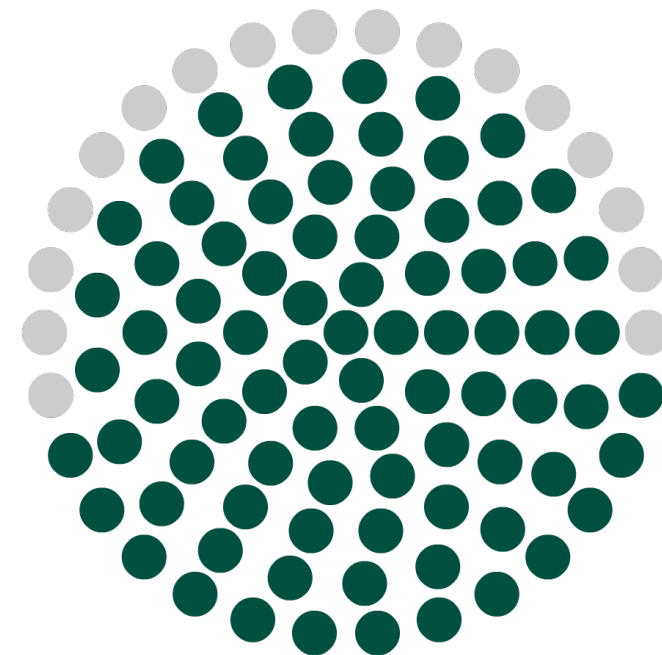


Supply chain  
& chefs

# Sustainable packaging

% of chefs who say that sustainable packaging is important, very important or extremely important

83%



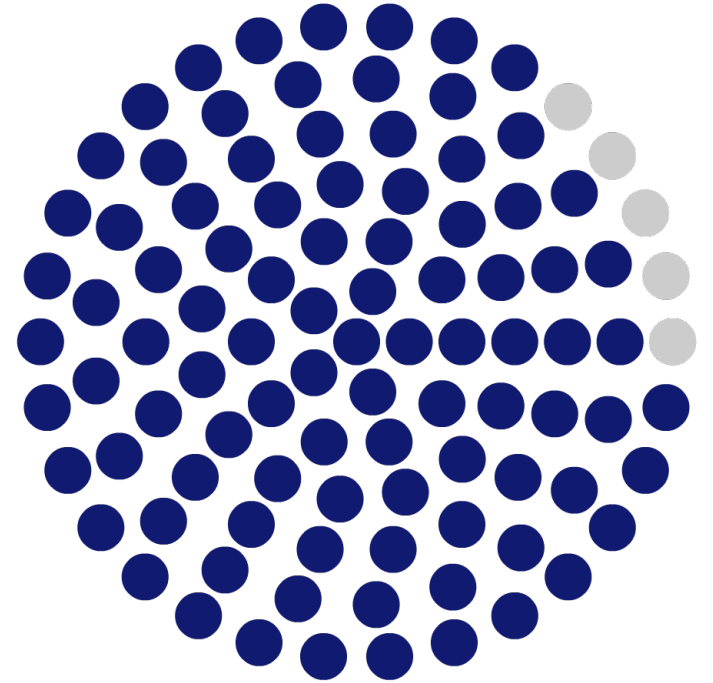
| Response             | Sustainability-Packaging |                 |
|----------------------|--------------------------|-----------------|
|                      | Supply-chain             | End-Users/Chefs |
| Not-at-all-Important | 6.3                      | 3.3             |
| Little-Important     | 43.8                     | 16.7            |
| Somewhat-Important   | 25                       | 16.7            |
| Important            | 25                       | 6.7             |
| Very-Important       | -                        | 40.0            |

Supply chain  
and chefs


# Importance of provenance

% of chefs consider  
provenance story is either  
important, very important or  
extremely important

95%



| Response✂ | Supply-chain✂ | ✂ |
|-----------|---------------|---|
| Yes✂      | 36.4✂         | ✂ |
| No✂       | 63.6✂         | ✂ |



Supply chain  
and chefs

# Importance of Proof of Provenance

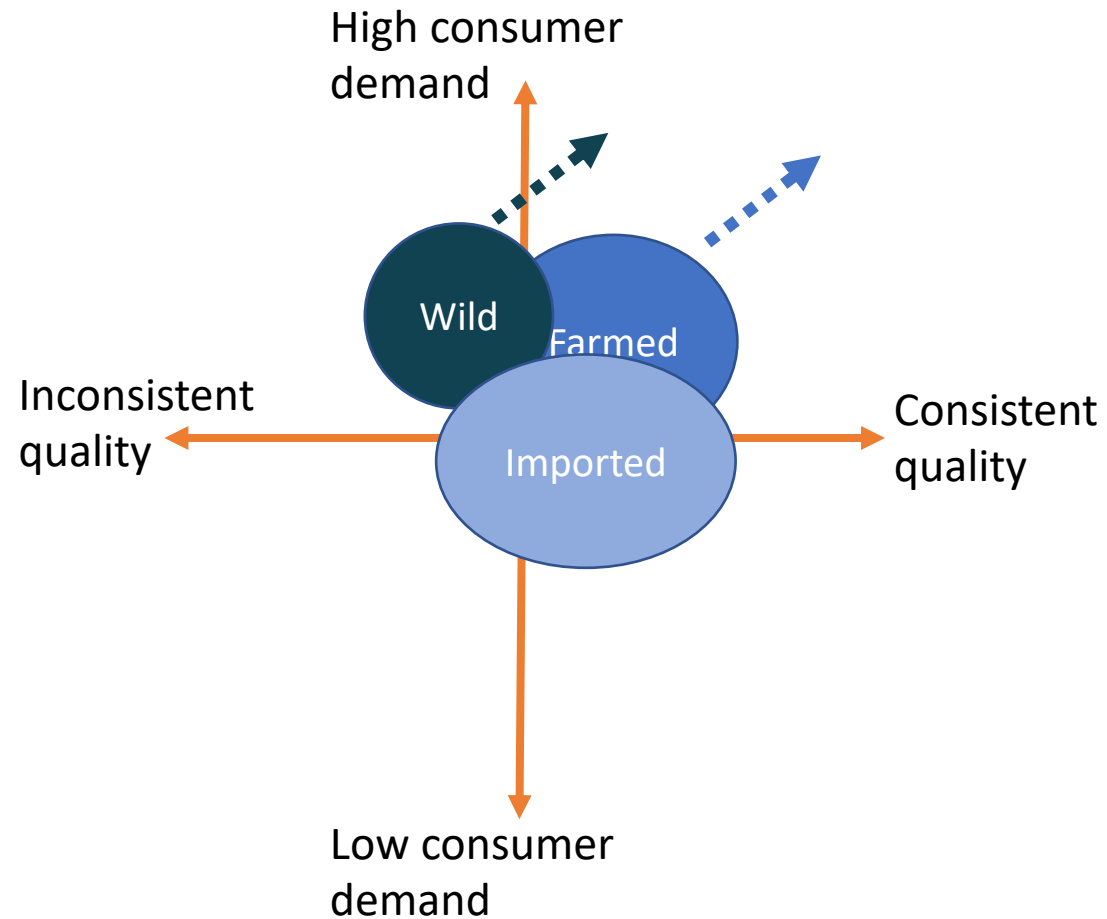
At point of plate, we want it noted if it is wild caught or a farmed product; in addition to country of origin labelling.

Very important to have a QR code to scan to obtain all of the details (e.g. date caught, name of boat and fisher, where caught; where landed and processed).

# It's a crowded market

But.....

There is an opportunity to work with farmed barramundi to build demand for Australian Barramundi and then differentiate wild from farmed (uncontested space)



# Perceptions

# Wild



# Farmed



# Imported





# Differentiating wild from farmed

| Feature                        | Benefit  | Value   | Farmed? |
|--------------------------------|--|---|---------|
| Sustainably wild caught        | Natural with no artificial feed, ethical purchasing, | Feel good about purchase – personal health environment health | No      |
| Iconic/heritage value          | Australian provenance                                | Feel good about supporting Australian fishers                 | Yes     |
| Convenience – fresh and frozen | Available all year round                             | Confidence in reliability of supply                           | Yes     |
| Taste                          | Confident purchase                                   | Enjoyable to eat  | No      |
| Versatility - formats          | Can be used in many different ways                   | Chefs can differentiate themselves                            | Yes     |

# There is good awareness of Barramundi as a category BUT...

Don't know where to get wild product


Don't know how to tell if they have a genuine wild product

Don't know the difference between wild and farmed

Wild product not available all year round

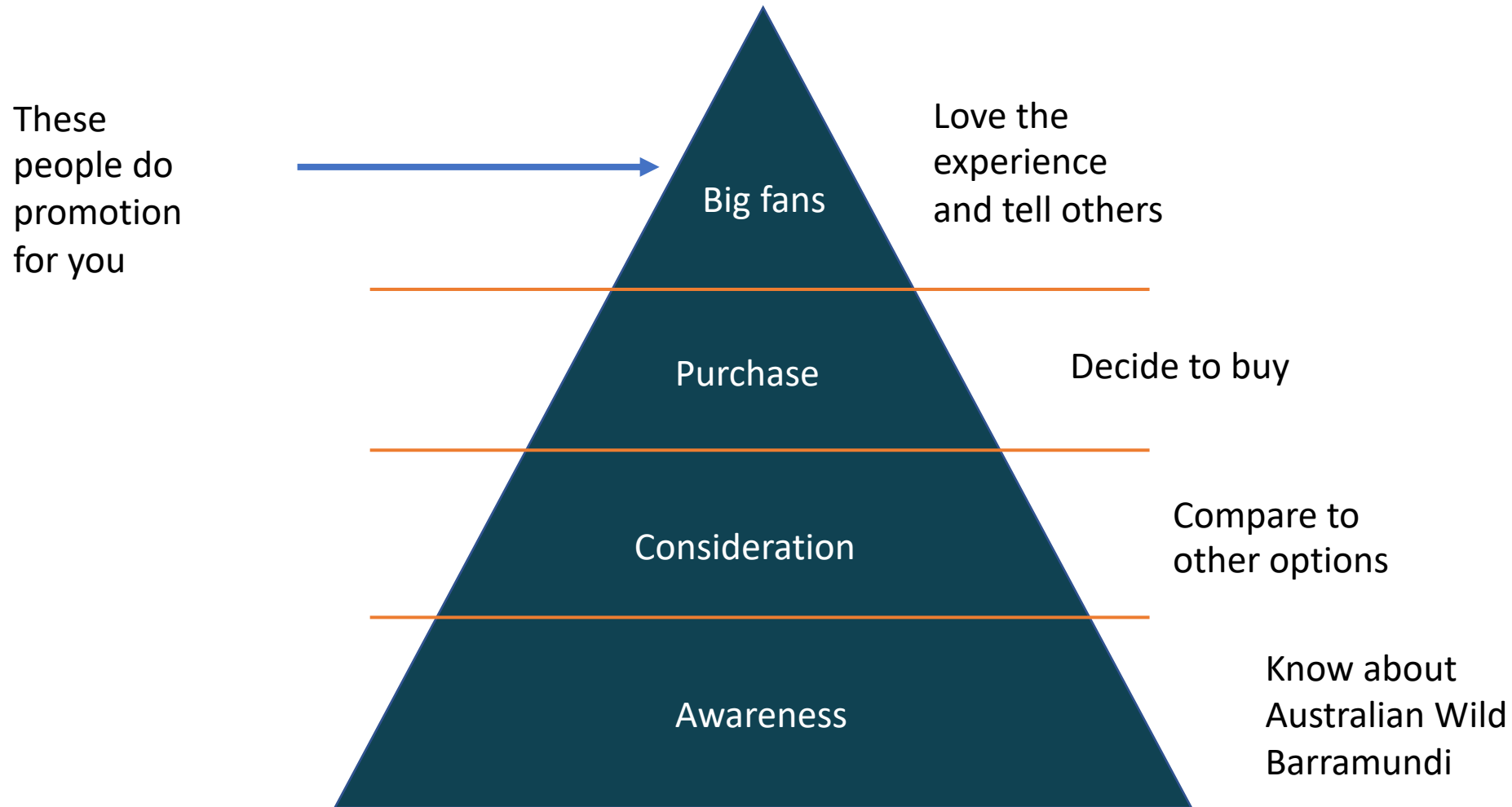
Barramundi is not special enough anymore for high end chefs

Product is not the right size and format – for anyone



Significant barriers to consideration and purchase

# The customer journey

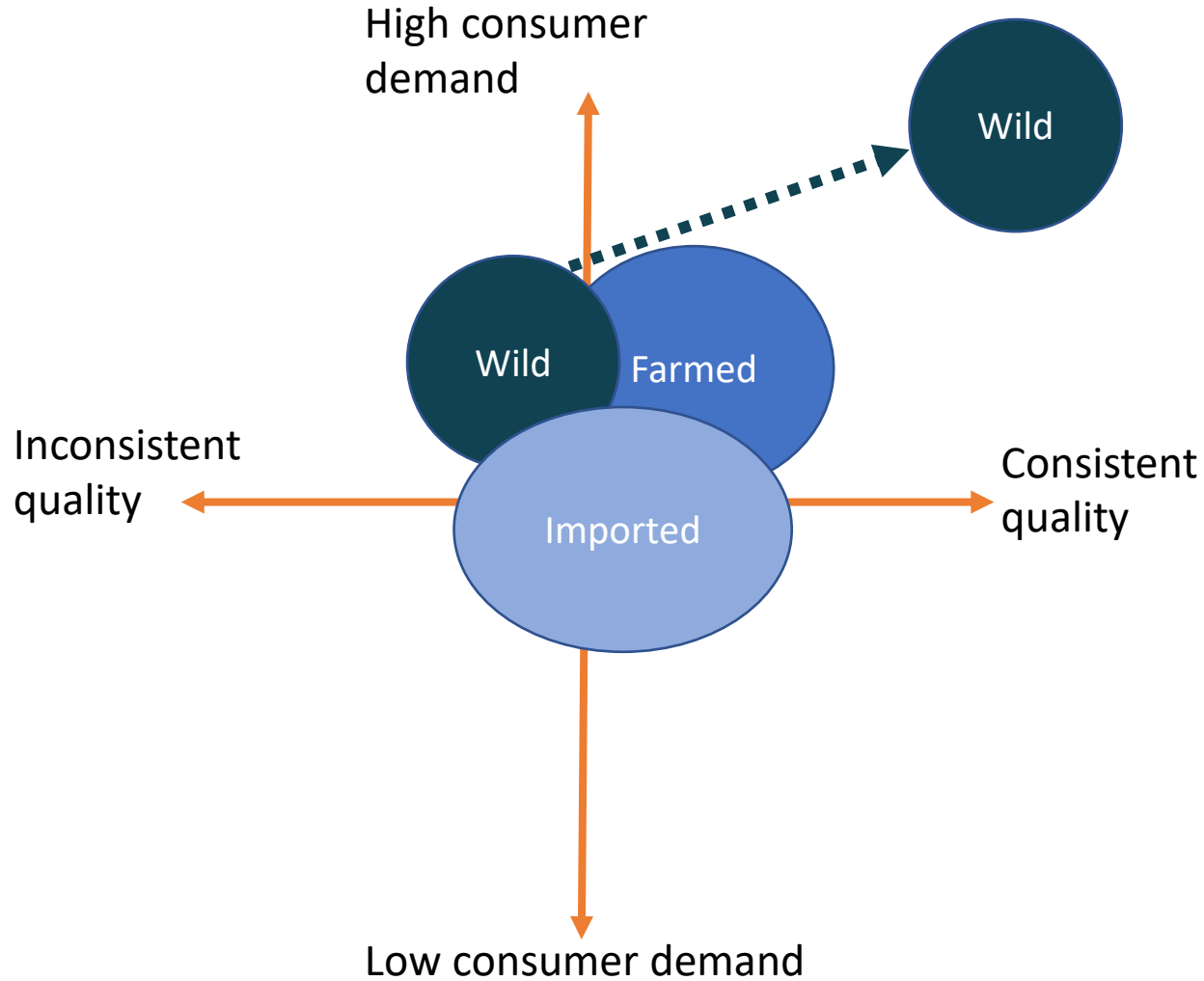


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Australian wild  
BARRAMUNDI

Working  
as one  
industry

Focusing on  
delivering what  
the customer  
wants



Move to an  
uncontested  
space

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To get Australian  
wild barramundi  
back on the plates  
and in the hearts  
and minds of  
consumers

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## Three objectives

To create a distinctive position that emphasises what consumers value and will therefore pay for

To consistently deliver on product quality expectations of customers

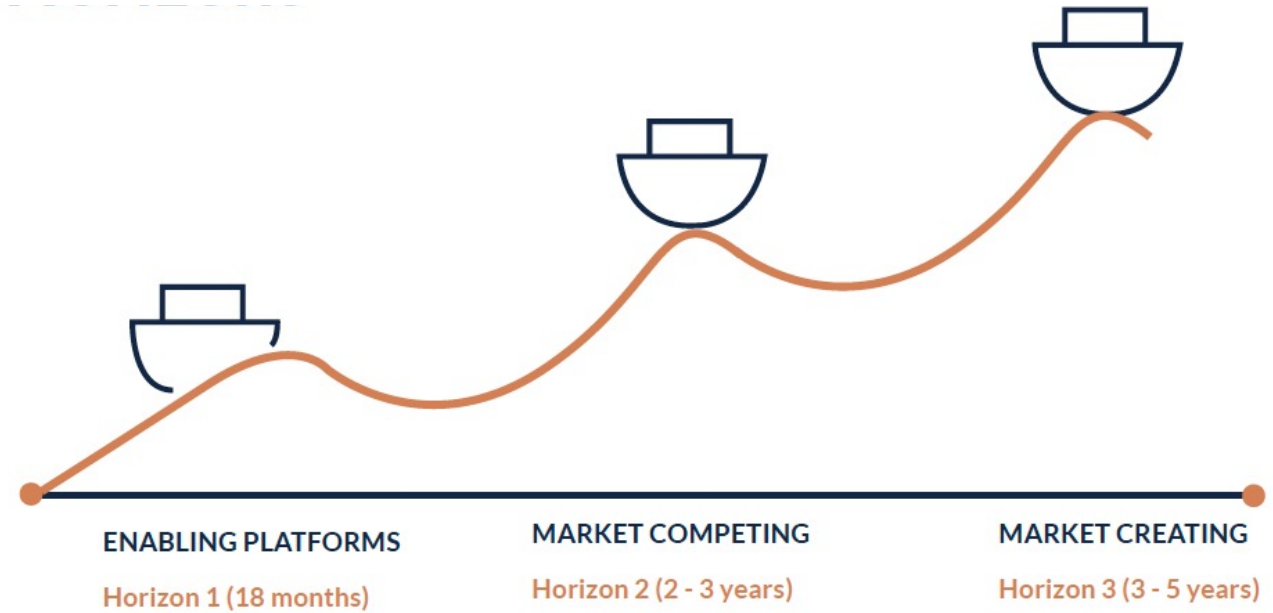
To reach and engage the right people driving them to ask for and buy Australian Wild Barramundi.



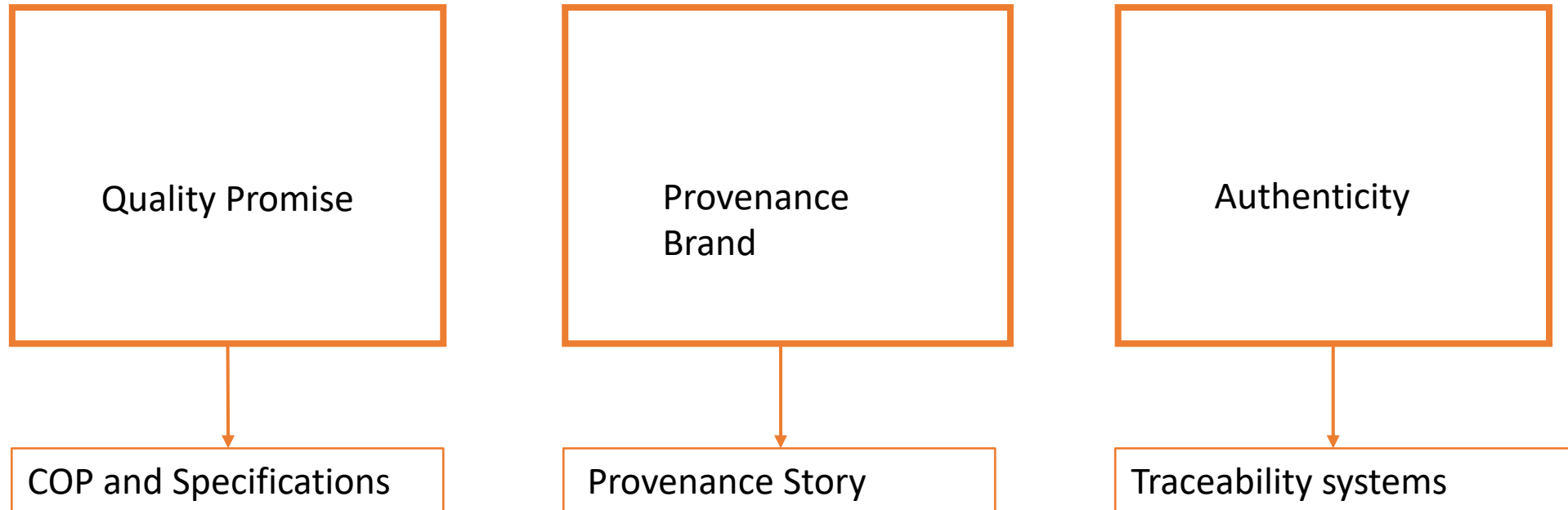
Strategy on a Page

|            |            |            |            |
|------------|------------|------------|------------|
| VISION     |            |            |            |
|            |            |            |            |
| MISSION    |            |            |            |
|            |            |            |            |
| OBJECTIVES |            |            |            |
|            |            |            |            |
| STRATEGIES |            |            |            |
| Strategy-1 | Strategy-2 | Strategy-3 | Strategy-4 |
| TACTICS    |            |            |            |
|            |            |            |            |

Strategy  
implemented  
over **three**  
time horizons



# Horizon 1:Three enabling programs





Product Quality

# Product Intervention Hierarchy



Quality Assurance -setting specifications

Processing improvements – onboard handling  
& technologies, packaging, total utilization

Product development – value adding, new  
markets,

Marketing innovation – provenance, niche  
consumers (culture, interests etc)

Technology – traceability, e-commerce

*Little-fat*  
 Scaled  
 200g-portion  
 White-flesh  
 Whole-fish  
 Some-fat  
 Fresh  
 5-6kg  
 1.2kg-fillet  
 Crisp-skin  
 Provenance-Qld  
 Firm  
 Centre-cut  
 Succulent  
 2kg-fillet  
 2cm-thick  
 Dry-skin  
 Portion  
 Not-muddy  
 Tender  
 Clean-flavour  
 Sea-smell  
 Skin-on  
 No-bloodline  
 Medium-size

## What Chefs want (their ideal barramundi)

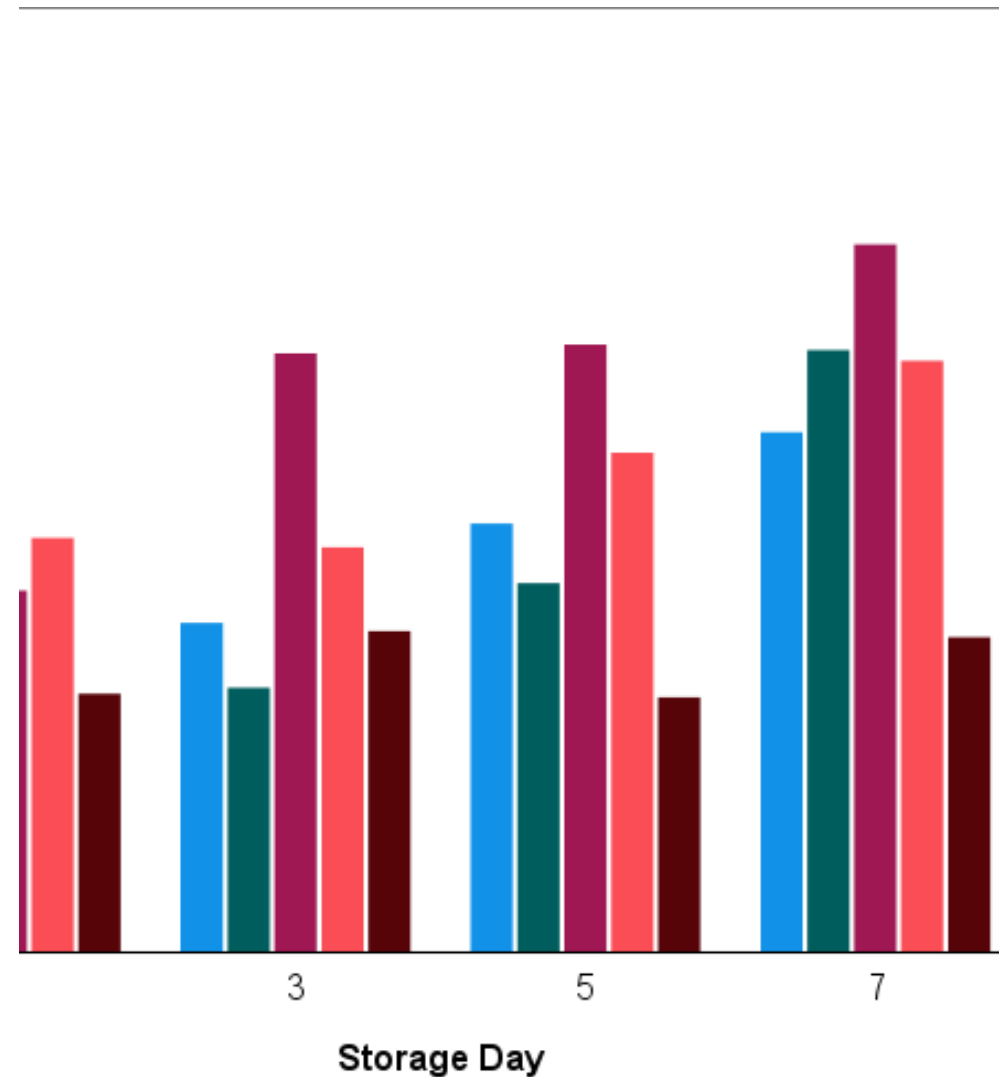
- mixture of formats (whole, fillets (skin on and skin off), portions) but consistent and standard size grading (especially for fillets) very important.
- firm flesh, some fat, white colour, fresh odour and taste, not muddy flavour.
- individually wrapped but less plastic.

# Quality Results from FIVE Frozen Fillet Wild Barramundi Samples

- different geographical sources
  - different packaging
  - assume different onboard practices
  - These analyses have enabled us to set benchmarks and a considered range of values across many different product quality parameters (underpins developed quality specifications).
- 
- Significant variation in Protein and fat content (0.15-3%) (all low fat)
  - Significant variation in colour, texture, quality index (consumer sensory analyses)
  - Moisture/drip loss only different on Day 0.
  - Significant variation in biochemical spoilage parameters (eg pH; TBARS; TVB-N) (aligns with micro and sensory results).

# MICROBIOLOGY RESULTS

- Significant Variation in Microbiology on Day 1, 3, 5 and 8:
- Low TPC can be achieved when compared to other finfish we have studied.
- Microbiological limits occurred from Day 3 and Day 8.





# Quality Specifications for Chilled Whole Fish and Frozen Fillets

- Defects, Contamination (eg mud), Agreed Quality Indicators (colour; texture; odour; quality index; agreed shelf-life specs?)
- Size Grading Specifications and Tolerances (draft grading table for comment)
- Temperature requirements (within specs including tolerances throughout the supply chain)
- Microbiology, Additives and Contaminants
- Packaging & Labelling Parameters
  - *Ice form and status*
  - *Not damaged carton/tub*
  - *Clear marking of species*
  - *Clear marking of size grade*
  - *Clear marking of Catch date/vessel/harvest area (provenance/origin).*
  - *Best before date*
  - *Meet FSANZ labelling requirements (+/- meta)*
  - *Correct Fish names list*
  - *Set weight/random weights*
  - *No Foreign Objects*
- Delivery Requirements
- Storage Parameters
- Facility Parameters



# GENERIC PRODUCT SPECIFIC SPECIFICATION DOCUMENTS (whole fish chilled, fillets frozen)

To be agreed along the supply chain, and can individually tailored by each company

| Quality and Process Specification         |   |
|---|---|
| Product Name                              |   |
| <b>Product Details</b>                    |   |
| Product Name                              |   |
| Scientific Name                           |   |
| FINO/Fishing                              |   |
| Catch Method                              | Union Trout and Pure salmon   |
| Seasonality                               |   |
| Intended Use / Customer                   | Further processing or domestic markets. To cook Product   |
| Raw Material Input Including Ingredients  | FISH  |
|   | INGREDIENT  |
|   | INGREDIENT  |
| Packaging                                 | Fish skin   |
|   | Label   |
|   | Shrink wrap   |
| Other Labels                              | Barcode   |
| <b>Label Information</b>                  |   |
| * Please include product CODE/MANUFACTURE |   |
| * E.g. customer label etc                 |   |
| <b>Process</b>                            |   |
| Grading / Product Tolerance               | Fish must meet the Green and Amber sections of the RAG rating requirements. Any product meeting the red or orange must not be packed. |
| Processing                                | * Keep fish whole and do not head or gut  |
| Glazing                                   |   |
| Packing / Packaging                       |   |

| Quality and Process Specification                     |  |
|---|--|
| Product Name  |  |
| <b>Label Positioning</b>                              |  |
| Add pic here  |  |
| <b>Product Tolerance</b>                              |  |
| RAG RATING  | <b>Target (Green)</b> <b>Tolerance (Amber)</b> <b>Not Allowed (Red)</b>  |
| Input Age and Sensory                                 | * Age profile not older than 3 days from catch<br>* Quality index less than 7  |
| Product Temperature (if weight process not available) | * Chilled up to 4°C<br>* Frozen colder than -18°C  |
| Physical Attributes                                   | * No mud / sand in the gills<br>* No visible parasites<br>* No foreign bodies  |
| Grade Size  | * Length:<br>- Large 24 - 30cm<br>- Medium 25 - 28cm<br>- Small 23 - 25cm<br>- Very Small 20cm<br>* Weight:<br>- Large 1500g<br>- Medium 200 - 1000g<br>- Small 400 - 300g |
| Packing / Packaging                                   | * Packaging clean and intact<br>* Carton sealed correctly  |
| Labelling   | * Placed neatly, straight & in correct position<br>* All required labels on packaging  |
| Product Temperature at unload and transport           | * <+1°C  |

| Quality and Process Specification |                                 |
|-----------------------------------|---------------------------------|
| Product Name                      |                                 |
| <b>Quality Index (RDC210/220)</b> |                                 |
| Parameter                         | Description                     |
| Skin                              | Appearance                      |
|                                   | Colour                          |
|                                   | Scale loss                      |
|                                   | Odour                           |
|                                   | Texture of fish (on dissection) |
|                                   | Form                            |
|                                   | Pupils                          |
|                                   | iris                            |
|                                   | Colour/appearance               |
|                                   | Other                           |
| Quality Index Total 10-20         |                                 |

| Quality and Process Specification                   |                   |   |          |
|---|-------------------|---|----------|
| Product Name  |                   |   |          |
| <b>Microbiological Standards (uncooked finfish)</b> |                   |   |          |
| Standard Plate Count (SPC)                          | <500,000 per gram |   |          |
| Salmonella  | Not Detected      |   |          |
| Campylobacter (per gram)                            | <1000 per gram    |   |          |
| Histamine in Fish                                   | <200mg per kg     |   |          |
| <b>Version Updates</b>                              |                   |   |          |
| Date of Change                                      | Version No.       | Update Details                                | Initials |
| 27/01/2025  | DRAFT             | New Specification                             | MLC      |
| 03/02/2025  | DRAFT             | Updated Skin Grading and Quality Index Visual | JM       |

Best Quality Product Photos will be taken for insertion in spec docs.

# SPECIES/PRODUCT SPECIFIC SPECIFICATION SUGGESTIONS

To be agreed along the supply chain, but suggested by chefs

## Frozen Fillets

### a. Consistent Size Grading and Tolerances

- i. Weight each fillet before packaging
- ii. Do not cut fillets to reduce grade to fill up carton
- iii. Size grading (eg Wild Barra Company specs)

| Size   | Weight (kg) | Carton |
|--------|-------------|--------|
| Small  | 0 to 1      | 5 kg   |
| Medium | 1.1 to 1.7  | 10 kg  |
| Large  | Over 1.7    | 10 kg  |

### b. Packaging

- i. Individual pack (sleeve or vacuum packed: frozen portions no packing?
- ii. Outer carton: cardboard? New packaging options; branded

### c. Agreed Quality index: has been developed for barramundi fillets and encompasses colour, texture, odour, gaping, blood (and skin colour and brightness if applicable)



# On Board Code of Practice for Wild Barramundi

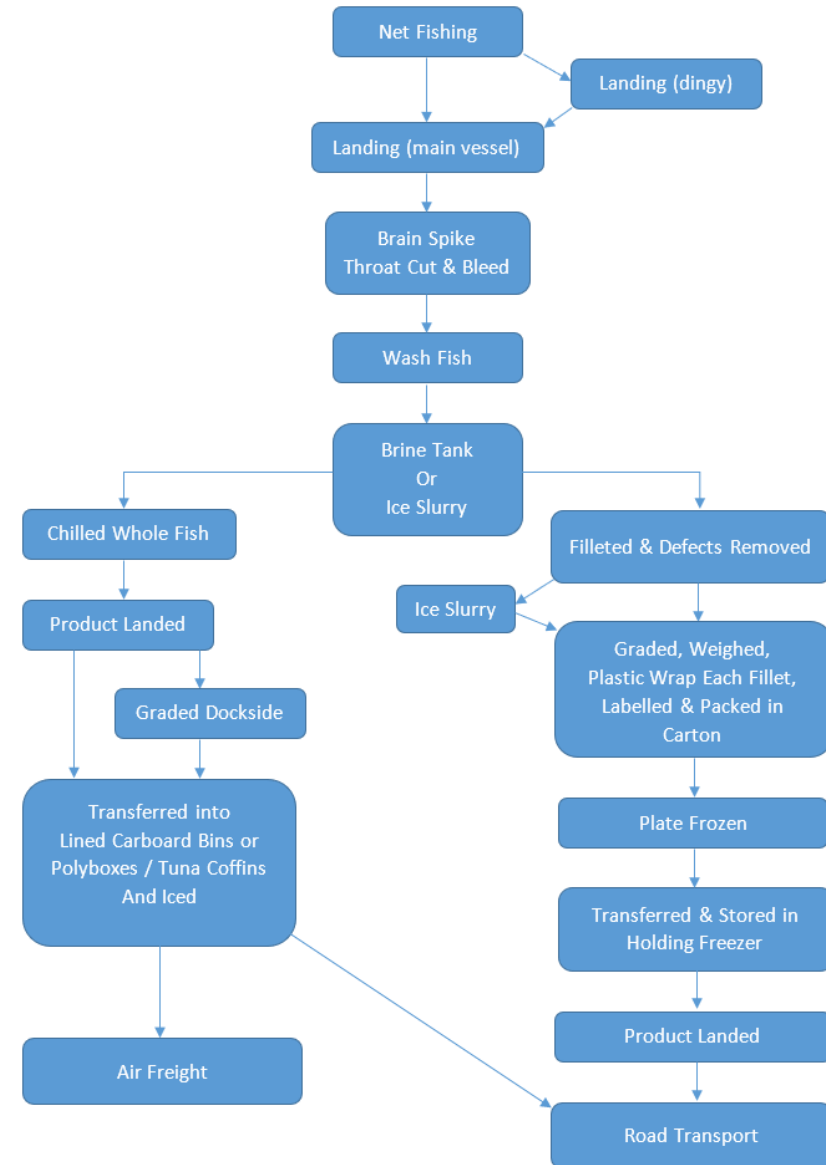


Table of Contents for COP is each step in the flow chart.

- Preparation before harvesting
  - Personal Hygiene
  - Equipment and Vessel Hygiene.
- Net Soak time and other fishing practices
- Harvesting (dingy and mothership)
- Sorting/Grading
- Washing
- Chilling
- Processing
- Packing and Weighing
- Chilling/Freezing
- Storage
- Unloading
- Product Assessment

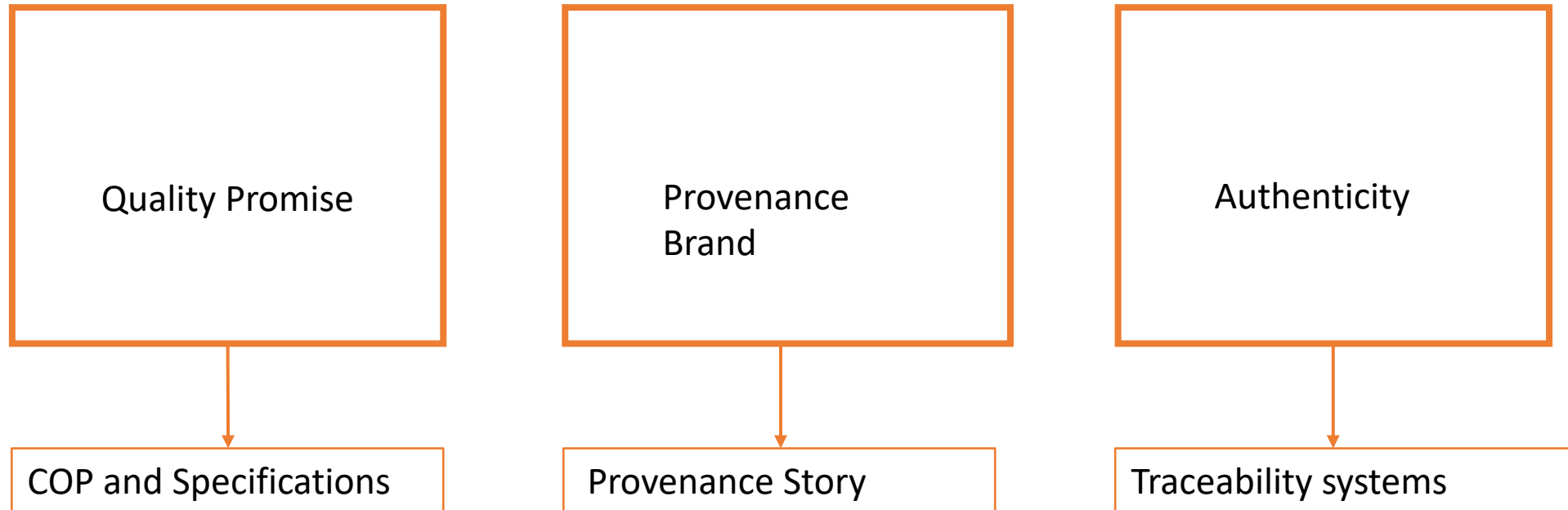


A wide-angle photograph of a coastal dune landscape. A wooden boardwalk, made of light-colored planks, starts in the foreground and curves gently to the right, leading into the distance. The dunes are covered in dense, tall grasses and some low-lying shrubs. In the background, the dunes continue to rise, with a line of dark evergreen trees visible on the horizon under a heavy, overcast sky. The overall tone is muted and atmospheric.

# Next Steps

Horizon 1

# Horizon 1:Three enabling programs

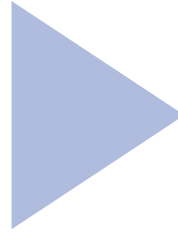


# Next steps for COP

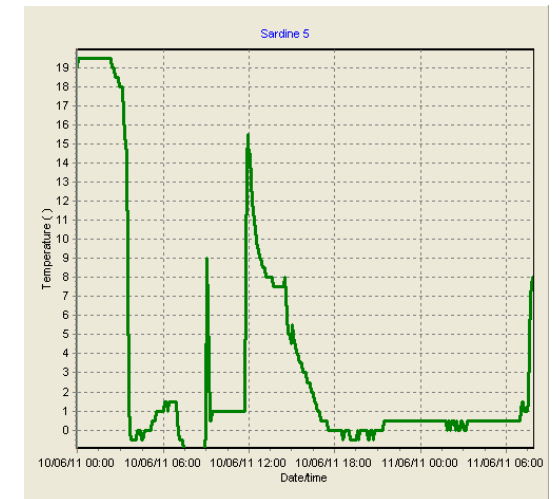
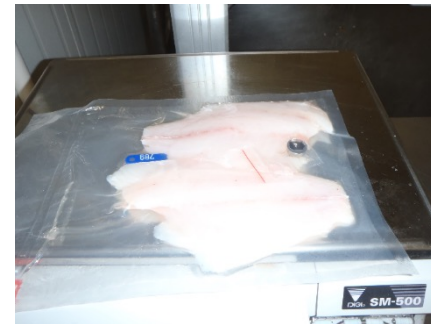
- Agree on content, layout, format and develop draft (COMPLETE).
  - Whole of industry review, comment, adjustment, (acknowledge different processes between vessels) (COMPLETE).
- 
- Walk through on vessels and discuss with skippers to ensure document matches activity
  - Whole of industry endorsement.
  - Agree Training and extension mechanisms (Laminated posters, on-line videos; on board training...).
  - Down chain extension?



Implement  
monitoring to  
compare with  
specifications



Identify  
problems and  
suggest  
interventions.





## Packaging Innovation

- Packaging Innovation (sustainable; compostable; branded; portions).
- Total Utilisation of Barramundi Harvest (bladders, wings etc)
- Extend Best practice and quality spec development to other by catch species

# Three horizons to quality improvement

Horizon 1: changes to on board logistics and cold chain management, geographical provenance testing; traceability; and better size grading

Horizon 2: alternate packing for different markets more specific protocols for net soaking times (based on species and size of fish, ambient sea and air temps) and processing time intervals

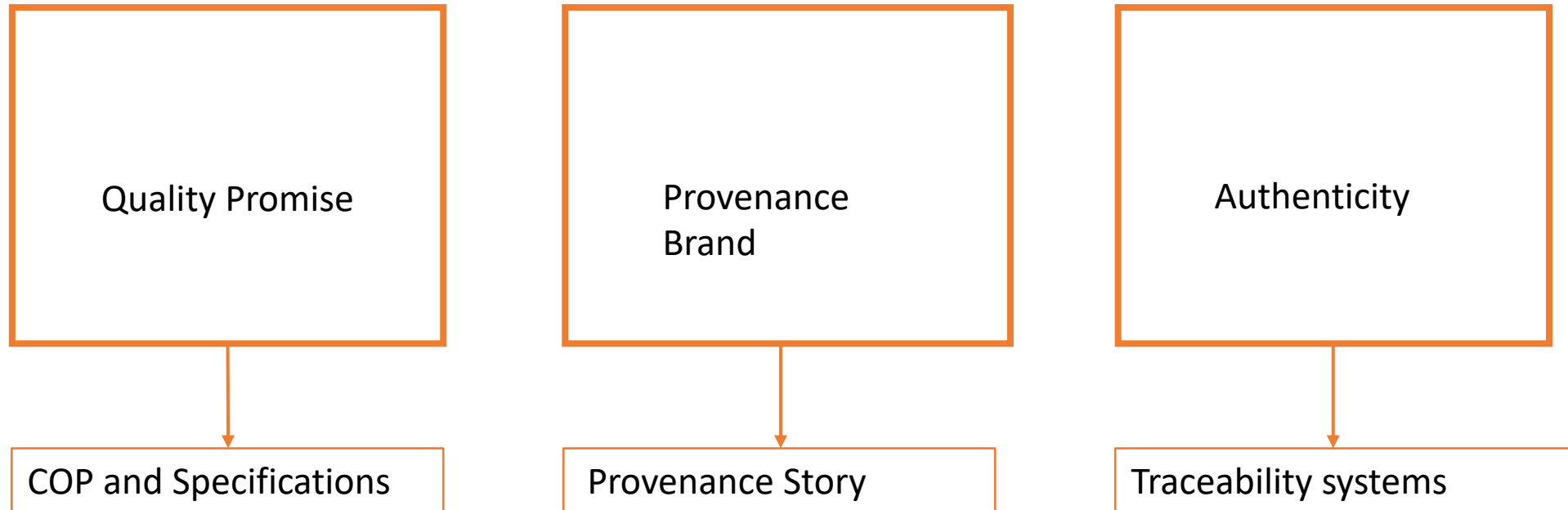
Horizon 3: vacuum packaging and packaging on board, processing for fresh



# Provenance Brand

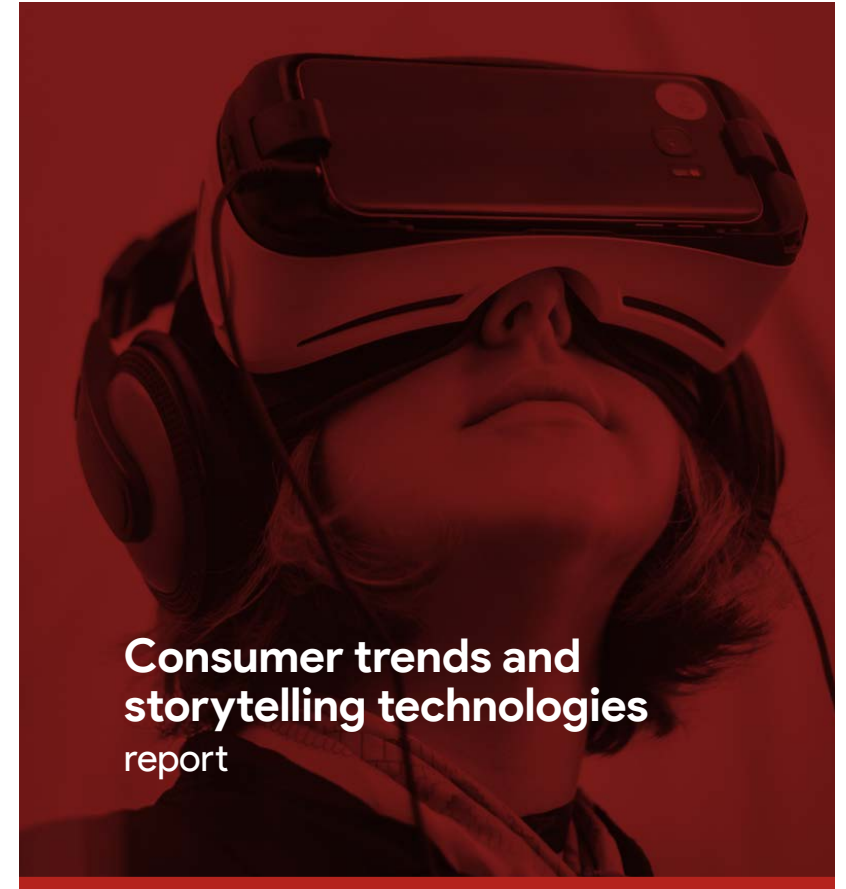
Based on your story

# Horizon 1:Three enabling programs





# Provenance Storytelling and Authenticity Technologies for Producers and Agribusinesses



Provenance storytelling for success  
February 2020



AgriFutures™  
National Rural  
Issues



What do we want them  
to know?  
What do we want them  
think?



# The Provenance Plus™ Framework

## Product

*Features, benefits and value*

## People

*Founders and key people*

## Place

*Origin and environment*

## Proof

*Basis of authenticity*

C

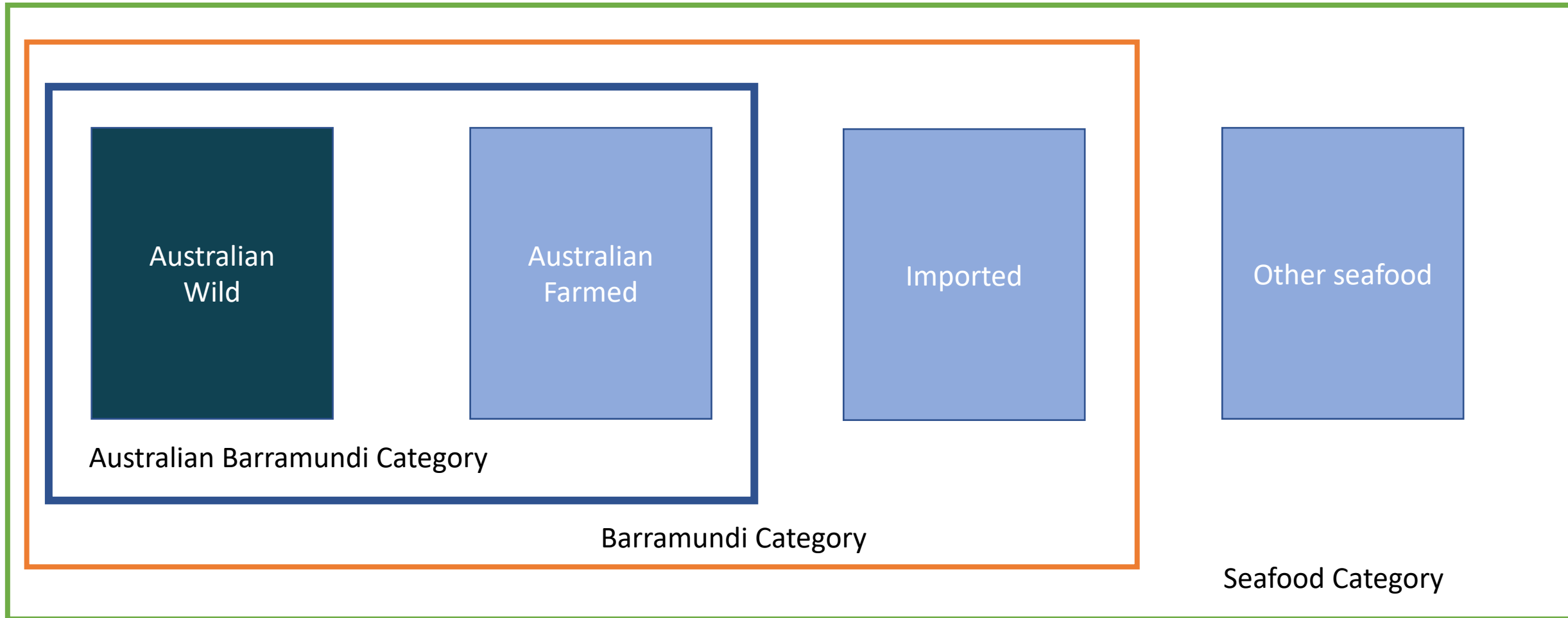


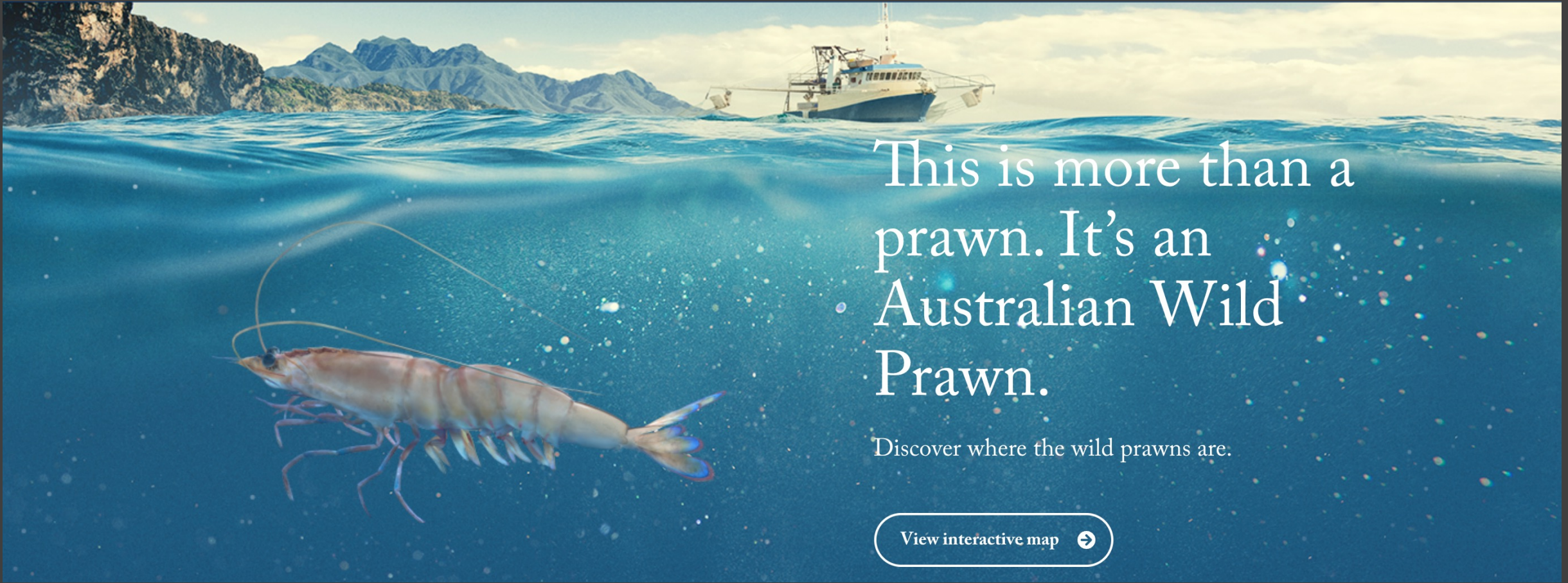
# Storytelling *tool kit*



[www.honeyandfox.com.au](http://www.honeyandfox.com.au)

# Provenance stories help you stand out





# This is more than a prawn. It's an Australian Wild Prawn.

Discover where the wild prawns are.

[View interactive map](#) ➔

Working as One  
industry

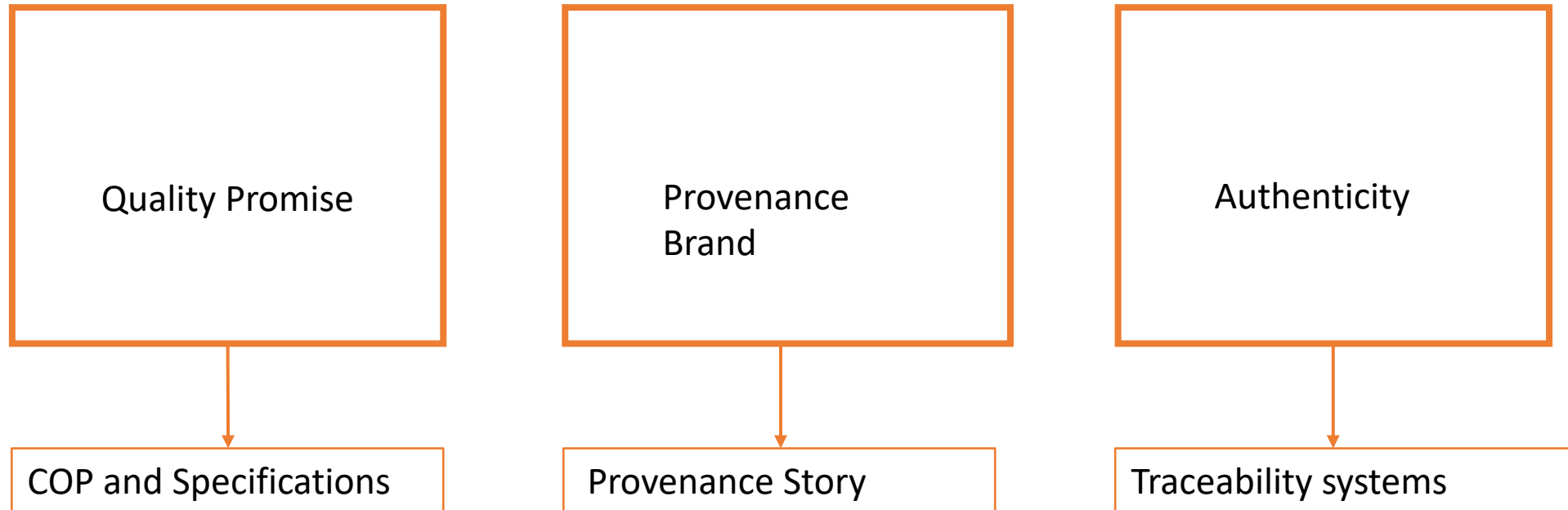
- Working with Australian farmed prawns - Love Australian Prawns
- Differentiating within the Australian Prawn category



# Pillar 3: Quality & Provenance Proof



# Horizon 1:Three enabling programs



“Trust is at a premium right now, with consumer trust at an all-time low. Without trust, credibility is lost, and reputation can be threatened.”

# The Provenance Plus™ Framework

Product

*Features, benefits and value*

People

*Founders and key people*

Place

*Origin and environment*

Proof

*Basis of authenticity*

C

# Integrated and modular approach to scientifically prove and digitally verify your product

SOURCE  
CERTAIN  
INTERNATIONAL

Proof of Origin



Authenticity  
and fraud  
protection



Traceability,  
product handing  
and journey

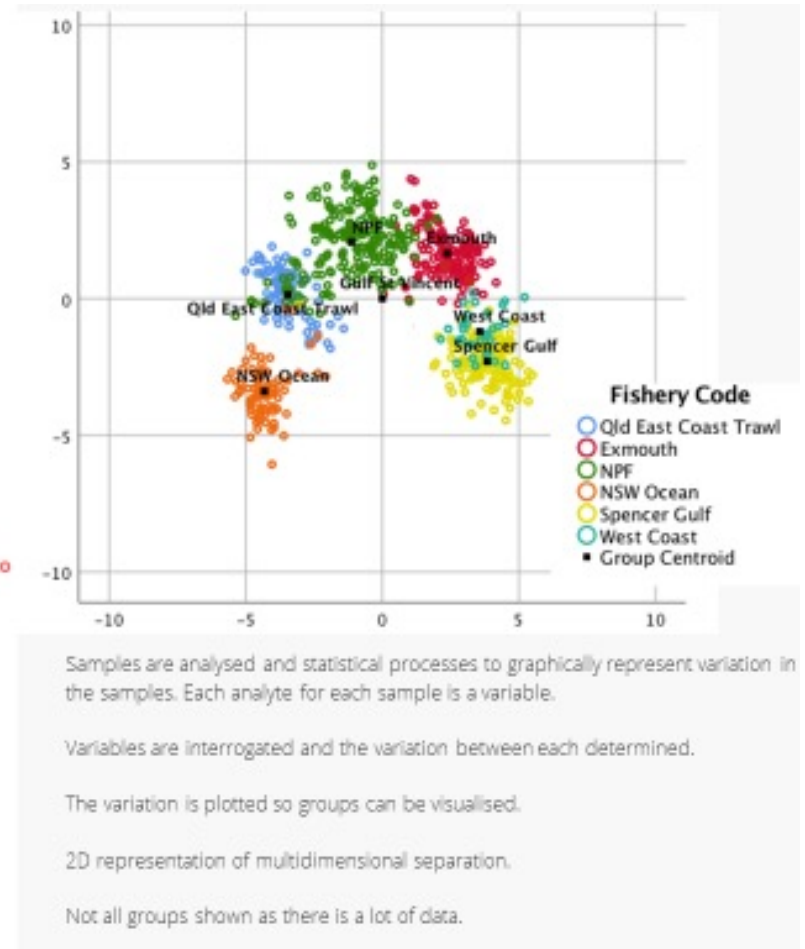
  
Honey & Fox

Brand assets  
and digital  
storytelling



## NEXT STEPS: Consider Innovation in On Board and Supply Chain Activity to Increase End-User Knowledge and Support

- Consider geographical provenance testing and validation (Trace metal profiling)
- Consider implementation of novel traceability tools (eg RFID tags).
- Consumer and end-user information (recipes, stories of the fishers and fishery; quality indicators; etc).
- Collaborative on shore processing...



TASMANIAN



# Building a New Tasmanian Value Added Lobster Brand

Stage 3 Introduction: Provenance Proof and Digital Storytelling

Kick-off meeting: 6 October, 2021



APAC  
PROVENANCE

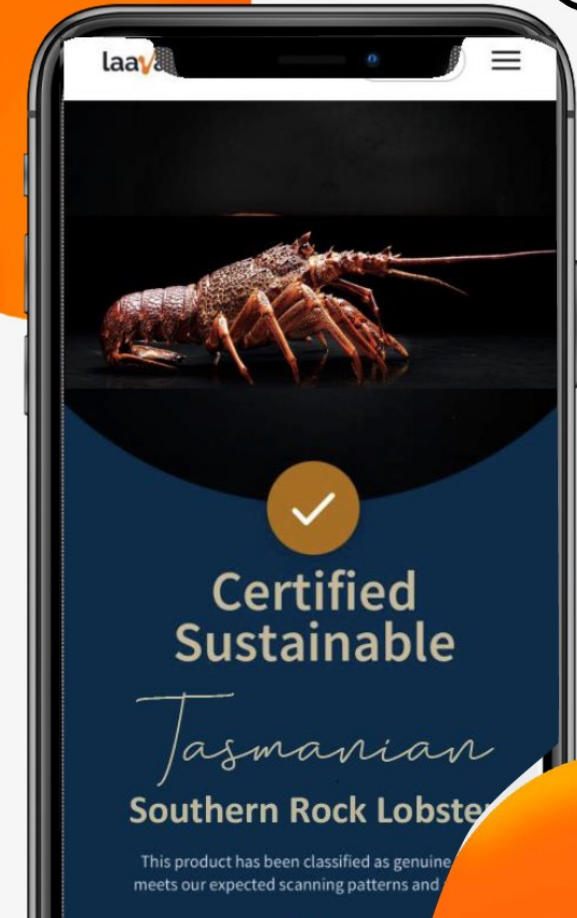


Honey & Fox

laava<sup>®</sup>  
The Global Mark of Trust<sup>™</sup>



escavox  
QUALITY PRODUCE HAS A VOICE

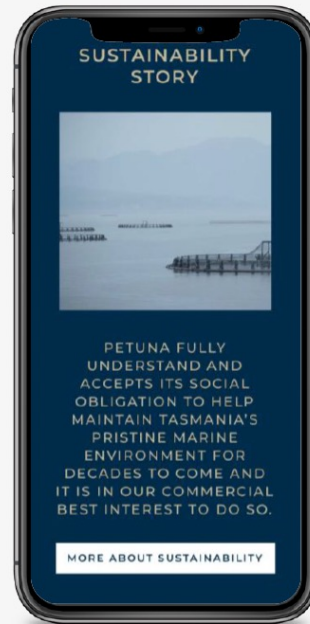




Authentication Screen



Traceability Story



Sustainability Story



Competition



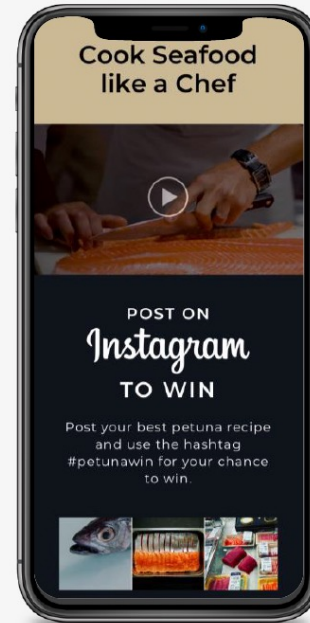
Product Story



Coles Affiliation /  
Learn Recipes



Coles Affiliation /  
Shop Ingredients



Learn Recipes /  
Social Promotion



WWF Affiliation



Certification /  
Country of Origin

# Next steps

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Australian wild  
BARRAMUNDI

- 
1. Market Development Strategy finalisation
  2. Packaging Benefit/cost calculator
  3. Finalise COP and specifications
  4. Recommendations for next steps