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Australian wild  
BARRAMUNDI

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# Agenda for today

- Introductions
- Recap of the project
- What have we been doing?
- What did we find?
- What do we do next?
- Actions

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# Recap of the project

Who is involved and what we were asked to do

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## Project Partners

- Queensland Seafood Marketers Association
- Northern Territory Seafood Council
- Honey & Fox P/L
- The Fish Girl
- Stewart Wesson
- University of the Sunshine Coast
- Curtin University
- Funded by the FRDC





## 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 document new packaging, presentation and quality requirements needed to improve market share for wild caught barramundi



## Objectives

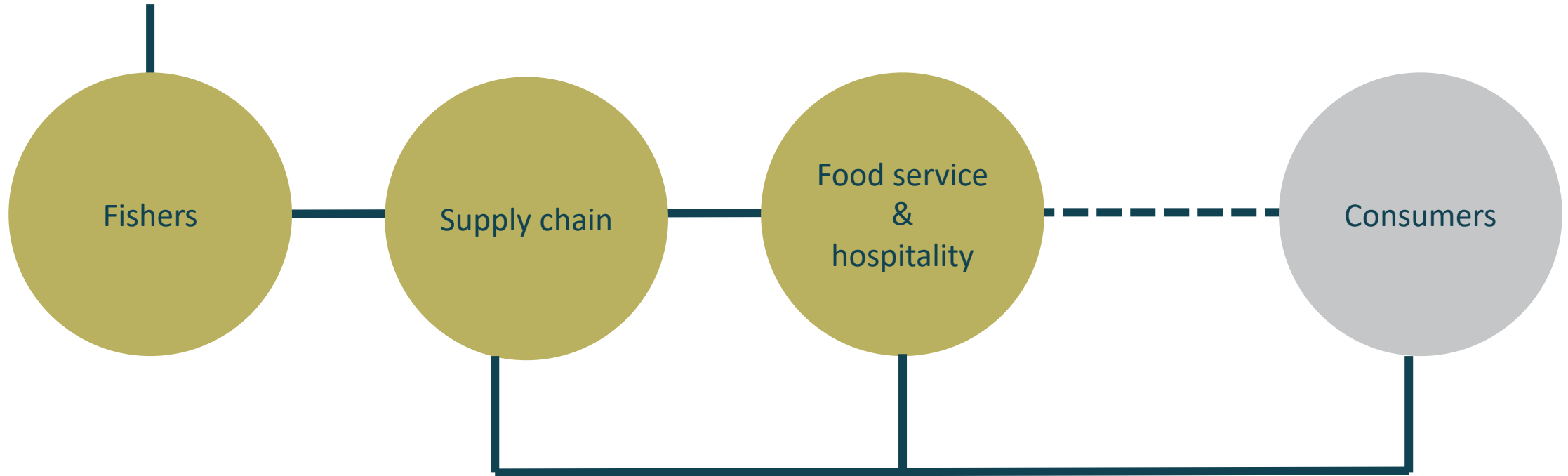
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To identify and document resources to trial and evaluate new packaging formats, product presentation and quality parameters targeting the food service and hospitality sectors

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

# Through chain approach

How can you deliver?



What do they know? What do they think? What are their operating parameters?

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## Project scope



**Diagnosis**



We are here



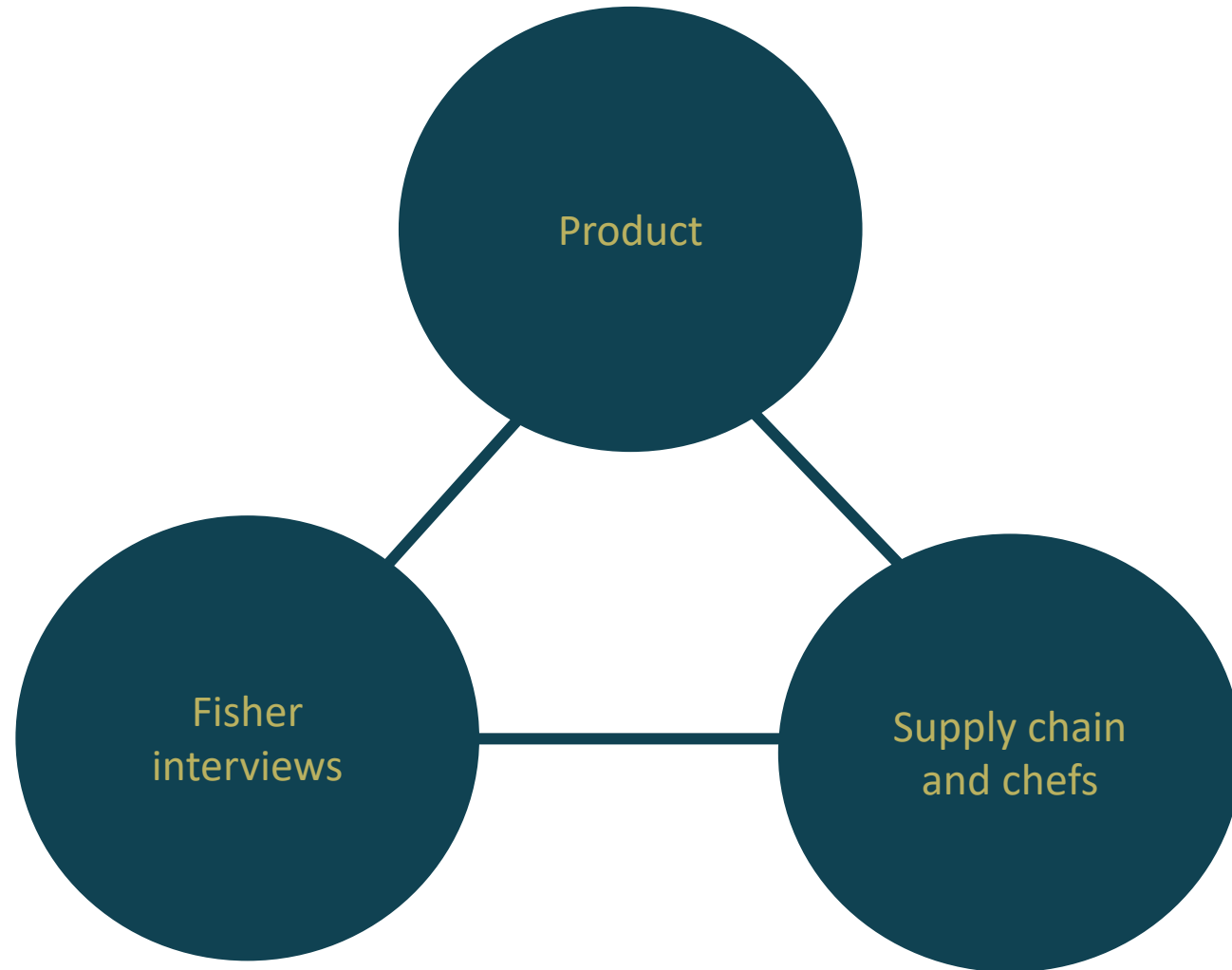
**Strategy**



**Tactics**

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## Three key sources of information



## Activities

1. Interview barramundi fishers across NT and Qld
2. Conduct workshop to report on findings and agree next steps
3. Work with fishers to develop draft market development and positioning strategy

1. Benchmarked quality of wild with farmed barramundi
2. Review on board handling processes and supply chain/chef interview results to develop quality specifications & COP
3. Resources to meet quality parameter, support new packaging and product presentations

1. Desk research of previous studies
2. Interviews (long and short) with supply chain and chefs across Victoria, SA, NSW, Qld and NT
3. Reviewed restaurant menus (online)
4. Visited and interviewed retailers



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What did we find out?



Fishers  
interviews

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“Coming together is  
a beginning, staying  
together is progress  
and working together  
is a success”

## Key findings – Challenges

- Wild Barramundi is undervalued
- Inconsistent in supply and quality
- There are opportunities to value add (and minimise waste) but unclear about the market demand
- Limited and inconsistent feedback from the supply chain about product and demand
- Buyers say that sustainability is not important

## Key findings – opportunities

- Work closely with the supply chain
- Marketing and promotion – provenance is important
- Consumer education
- Fisheries management rules change
- Improve quality and handling – develop a COP
- Maximise the value of the whole catch



Fishers

Have we missed anything?  
Did anything surprise you?



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“Quality is more  
important than  
quantity”

# 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





Product

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# Key product benchmark findings

(1 sample)

Low thawing loss = less revenue loss

Firm texture and fragmented easier (flaky)

Low fat

Fresh fish smell

Light flesh colour (less red/brown than farmed)

High protein content

Low micro counts = longer shelf life





Product

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There are clear positive  
product features

- a. Who knows this?
- b. What advantages does this  
give you?



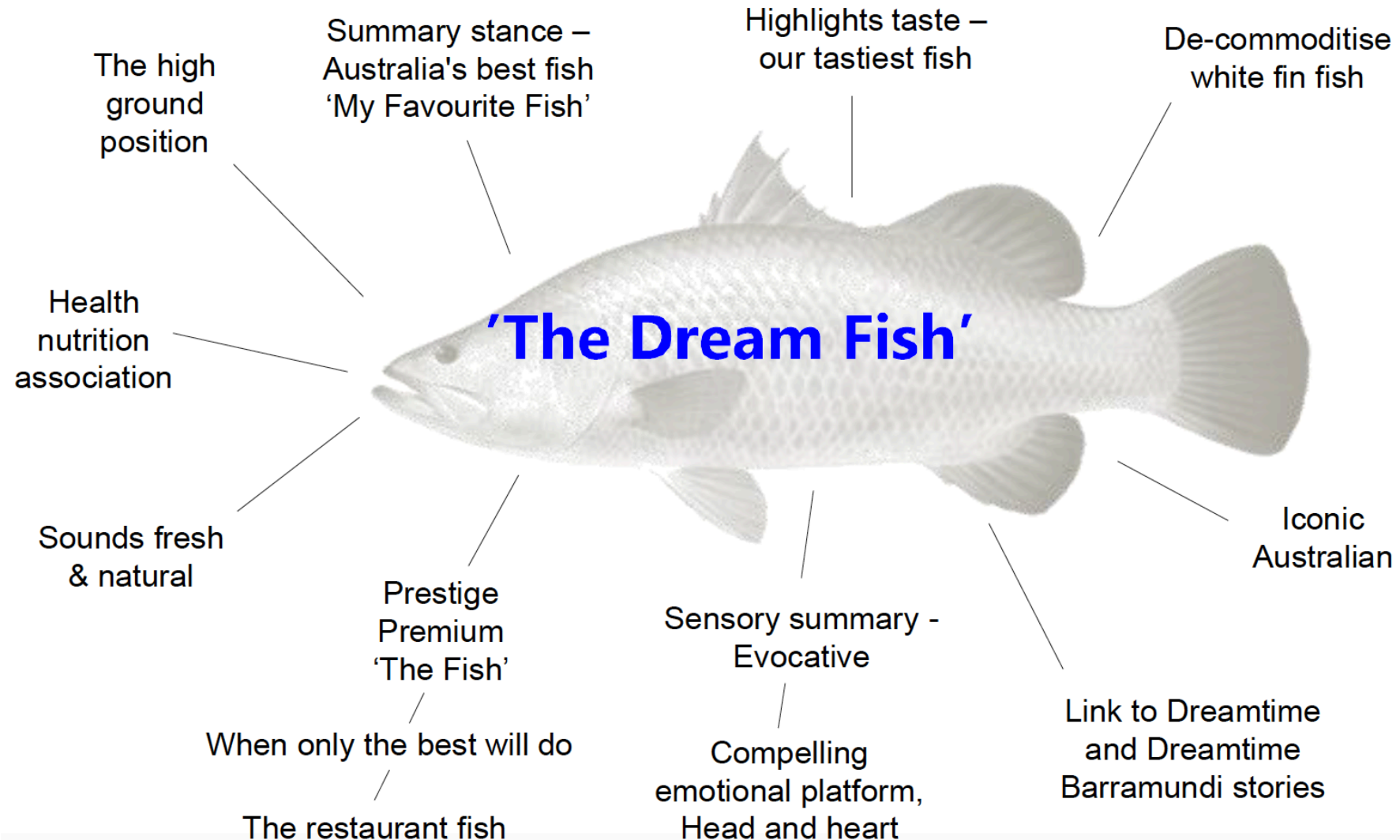
Supply  
chain and  
chefs

“My ideal barramundi is pan fried crisp skin, firm flaky white flesh that is juicy not dry, not too soft and clean flavour”

## Previous studies – Consumers

- Consumers value Australian provenance
- Farmed versus wild caught does not influence consumer decisions
- People who do report that they prefer wild-caught are male, older, more frequent seafood eaters and Queenslanders
- Barramundi is perceived as a Queensland/NT fish

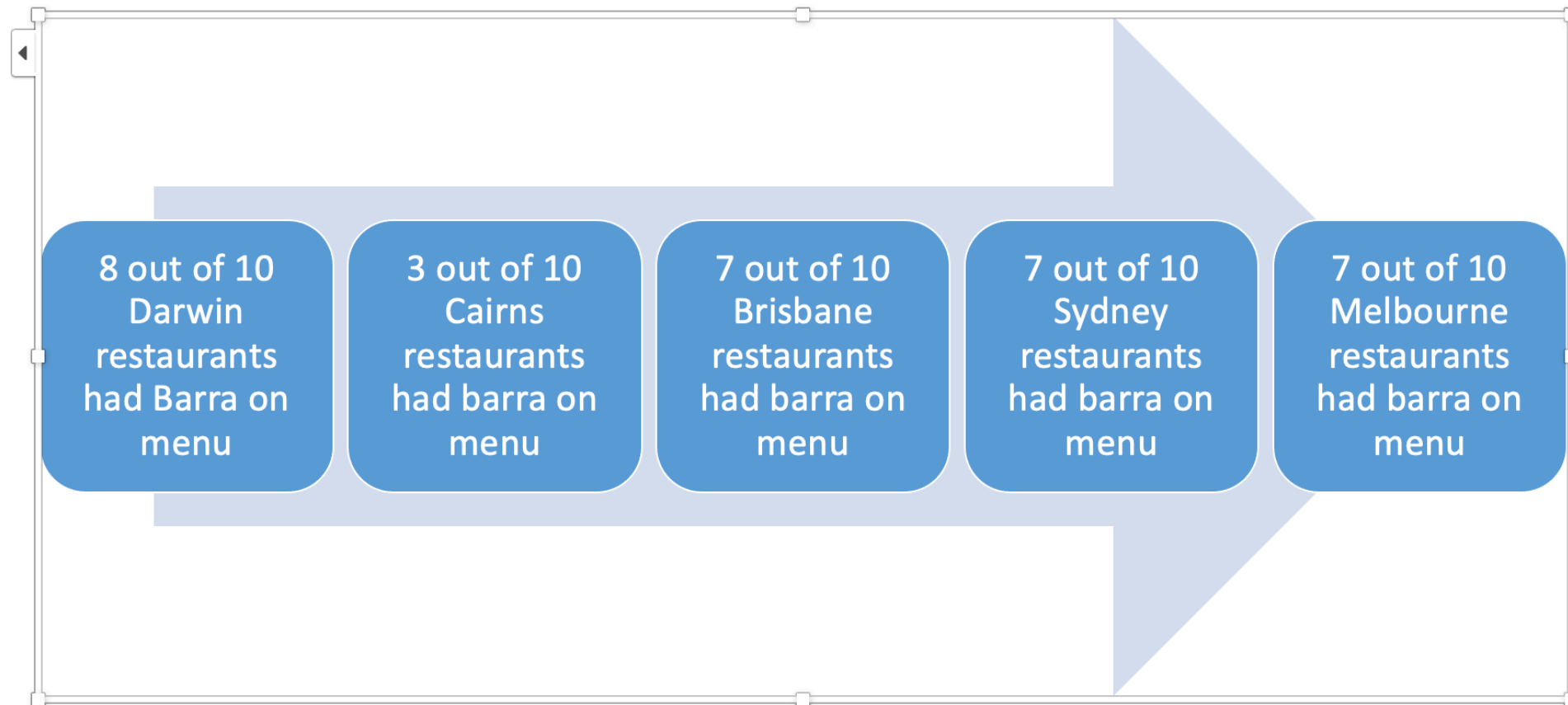
# Barramundi's Compelling Position



## Previous studies – supply chain

- Supply chain are perceived by the food service sector as gatekeepers of information – to fishers and to chefs
- Supply chain could provide a much better service responding to demand quicker
- Many food service and hospitality venues purchase from multiple wholesalers because they can't get everything from one source – but they would prefer to minimise the number of suppliers

## Online menu reviews (trip advisor)



Desktop  
research

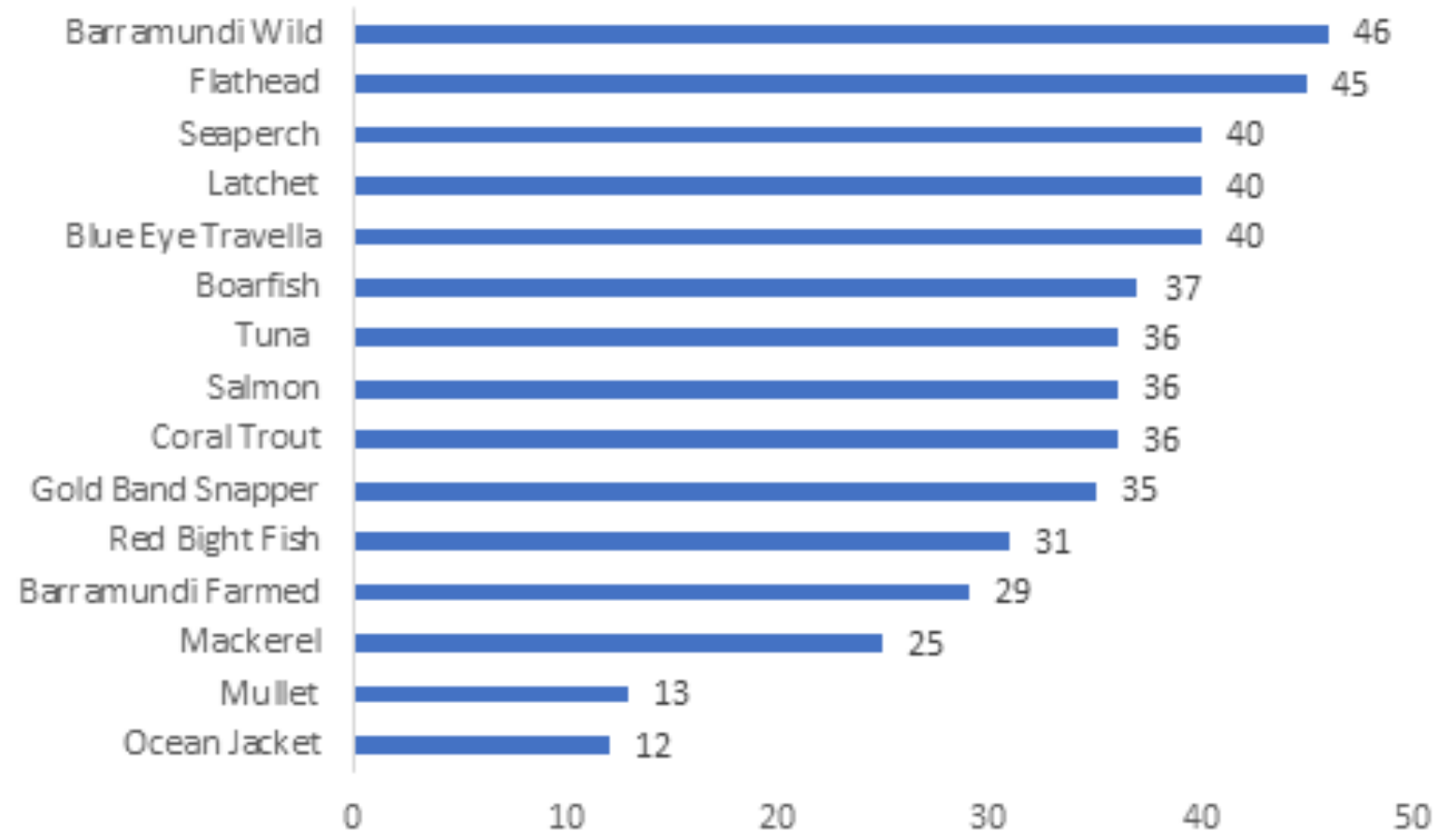
## Menu key words

| Word                              | Count |
|-----------------------------------|-------|
| Wild                              | 17    |
| Queensland                        | 18    |
| Local                             | 9     |
| Northern<br>Territory/NT          | 5     |
| Sustainable and/or<br>Aquaculture | 1     |
| Australian                        | 1     |

## Retail prices (March/April 2020)

Average retail prices across Australia. Note high level of competition around the same space and the need to be distinguishable.

NB: no check on correct labelling of product





Barramundi  
on the  
menu?

69% **Yes**



31% **No**



Mainly  
purchase from  
wholesalers



## Supply Chain and Chefs

Wild,  
Farmed or  
imported?



Farmed  
**80%**



Wild caught  
**18%**



Imported  
**2%**

# Perceptions

# Wild



# Farmed



# Imported



# Why don't you stock wild barramundi?

*"It is a good product, however it is inconsistent in supply and variable in quality due to handling and grading."*

*"Too unreliable on availability, sizing and price. Also my clients demand skin on and it is rare to get that off Wild Caught"*

*"Price point is too high and there simply isn't enough volume for us"*

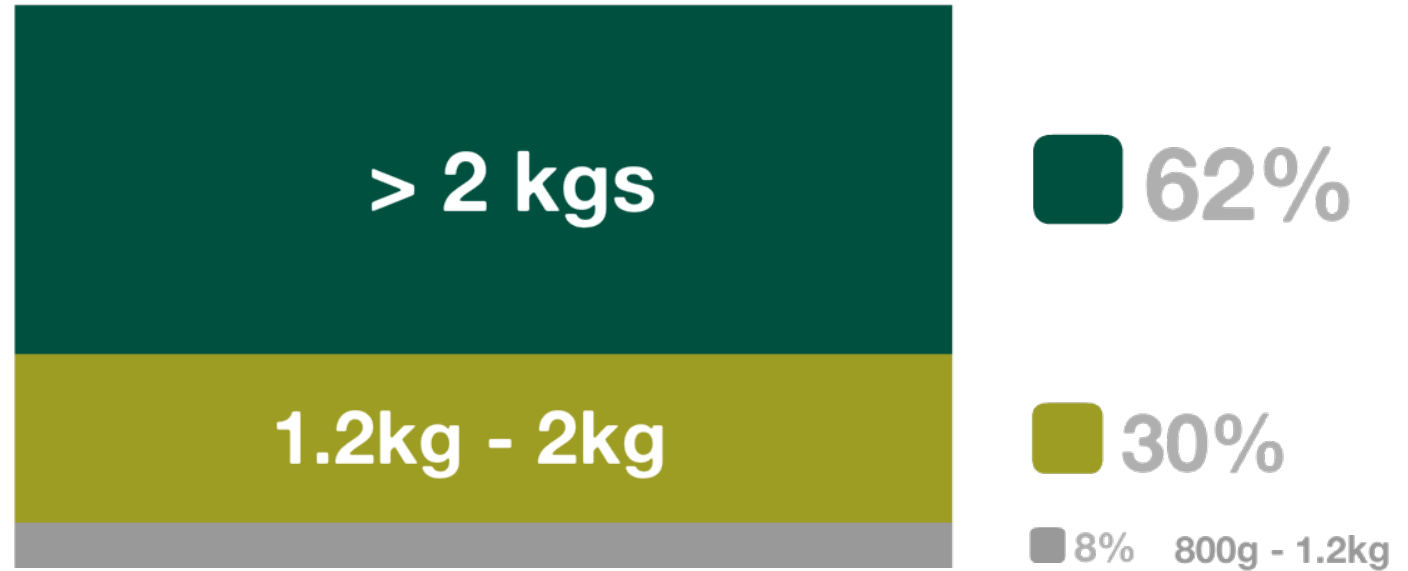
What can be  
improved?

Inform-availability  
Consistent-supply  
Offer-it  
Advise-availability  
Provenance  
Lower-price  
Product-information  
Improve-sizing  
Recipes

# Ideal Barramundi?

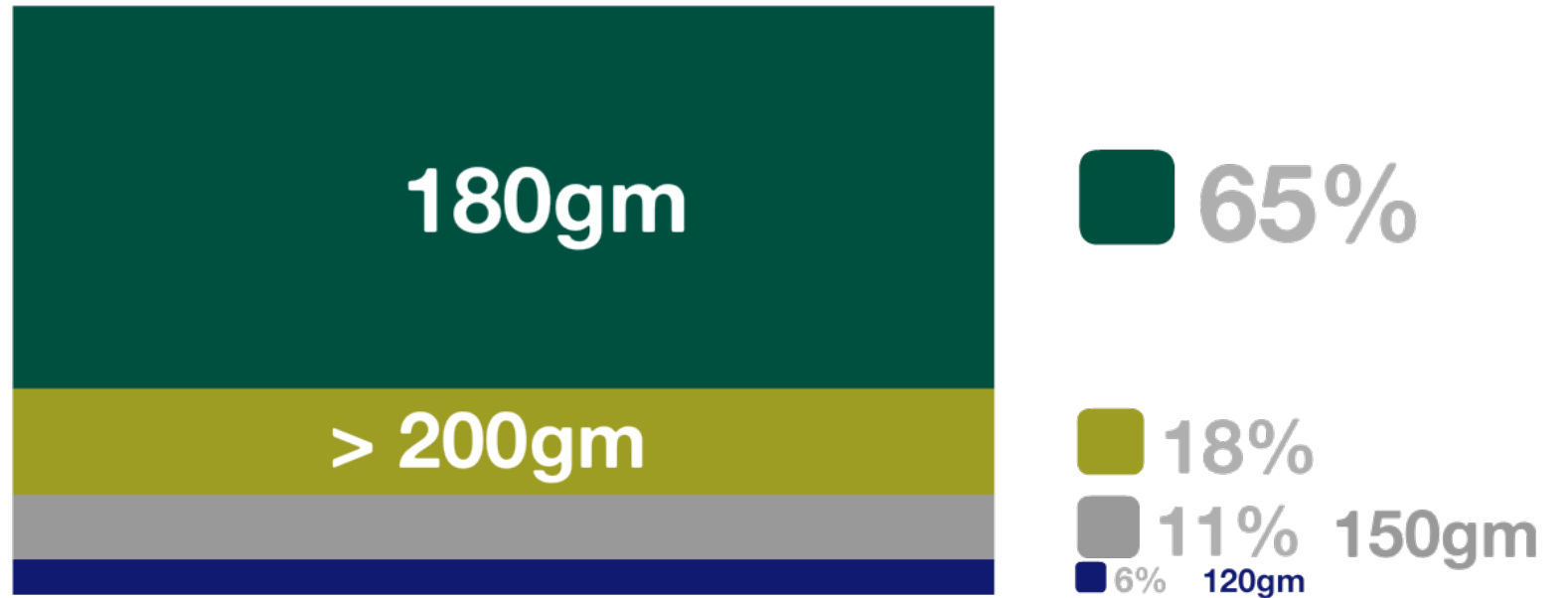


## Preferred Size whole fish





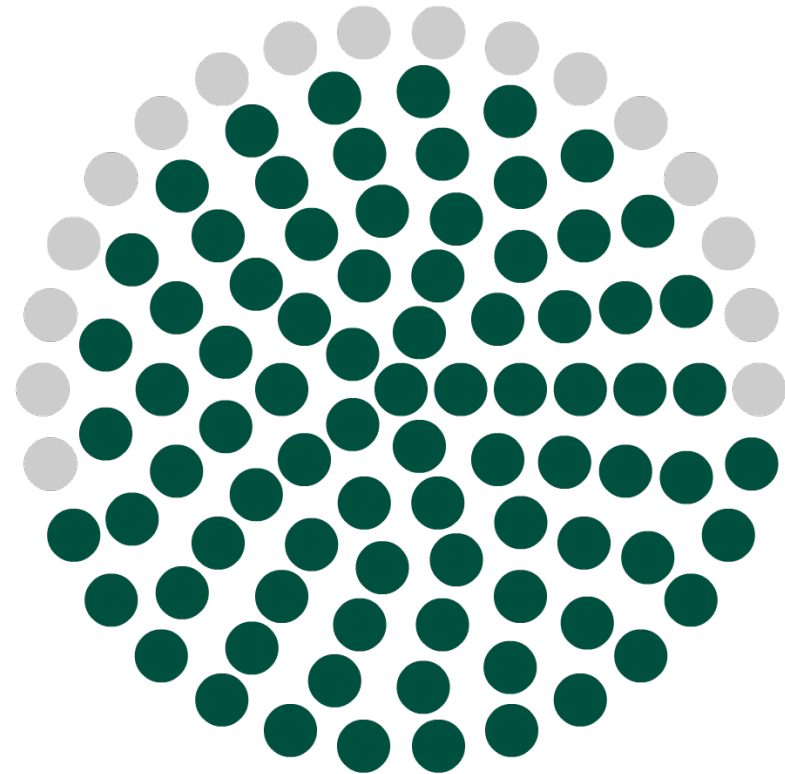
## Preferred Size Fillets (chefs)



## Sustainable packaging

83%

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

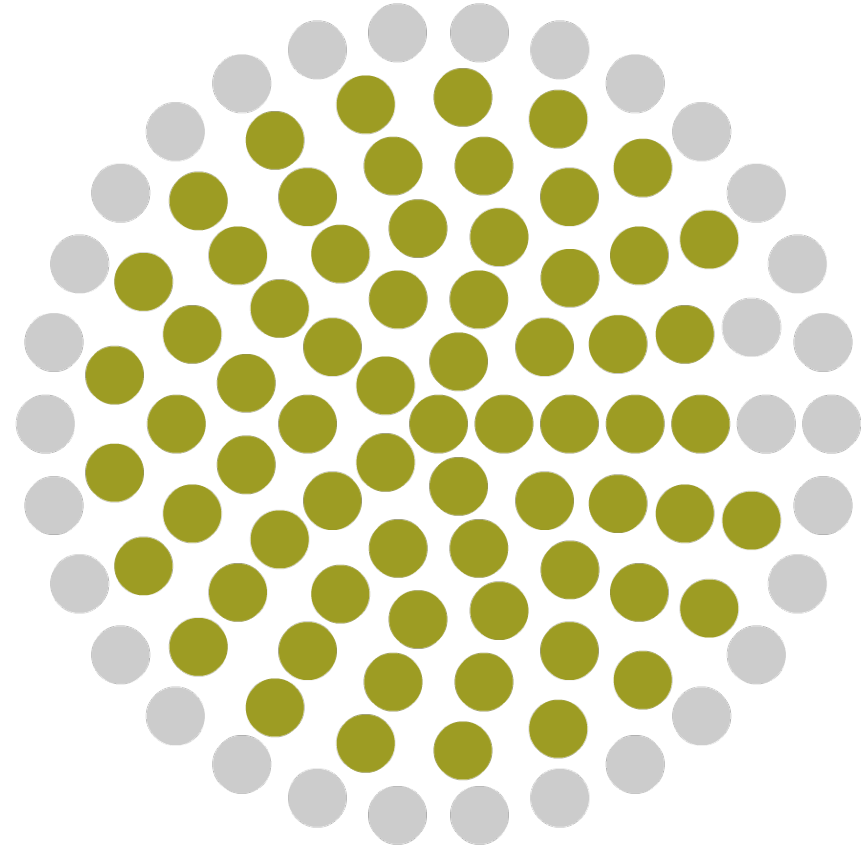


Supply chain

## Provenance

68%

Chefs say that provenance is extremely important, much higher if you are very important and important

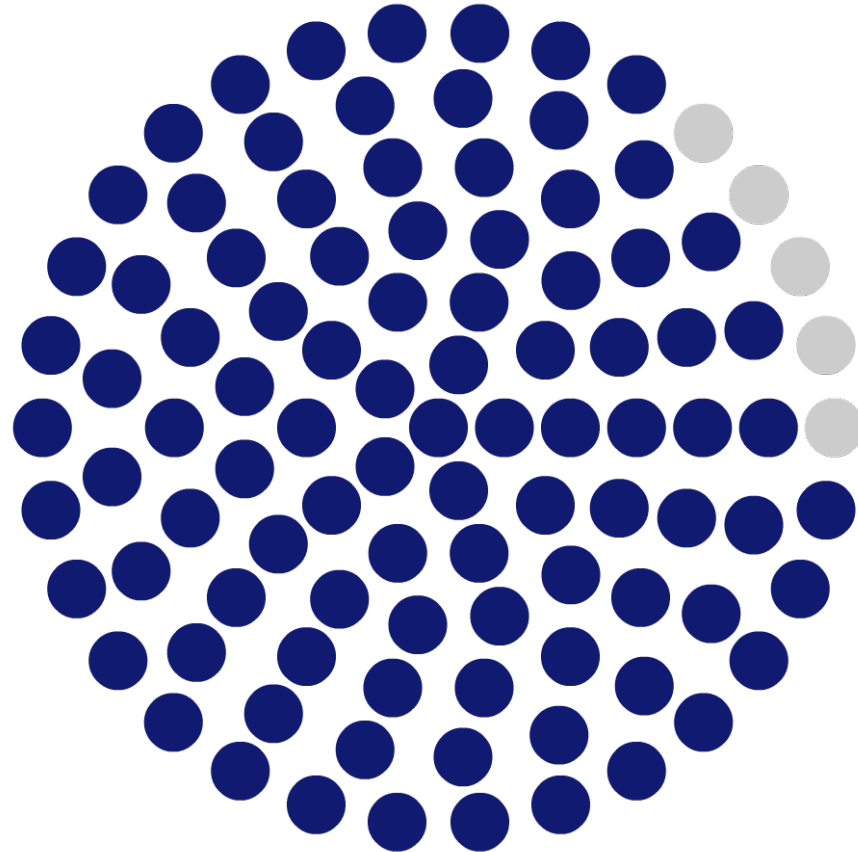


Food service  
and  
hospitality

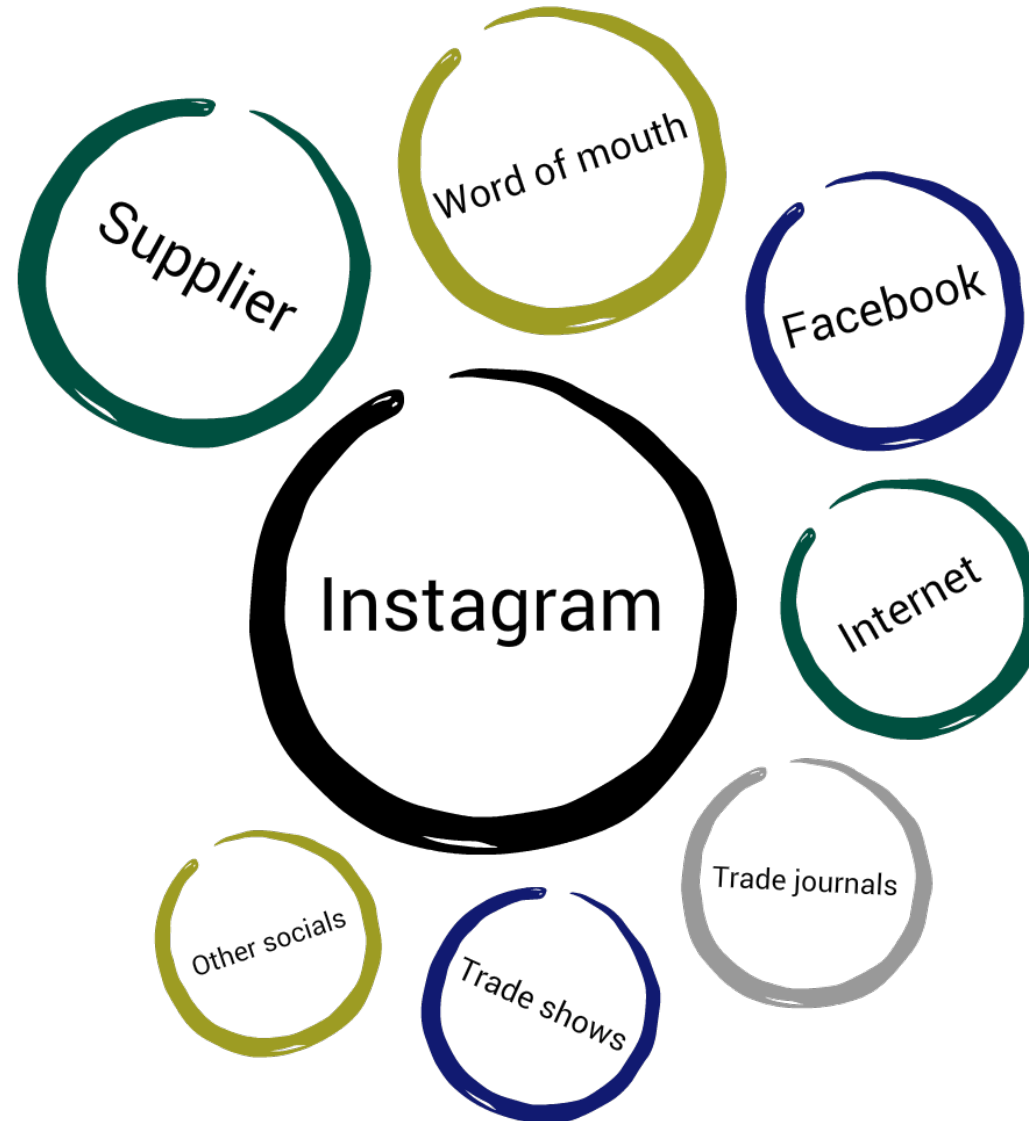
## Storytelling

95%

Chefs consider that storytelling is  
either important, very important  
or extremely important



Where do  
chefs find  
out about  
food trends



## Chefs marketing and promotion efforts

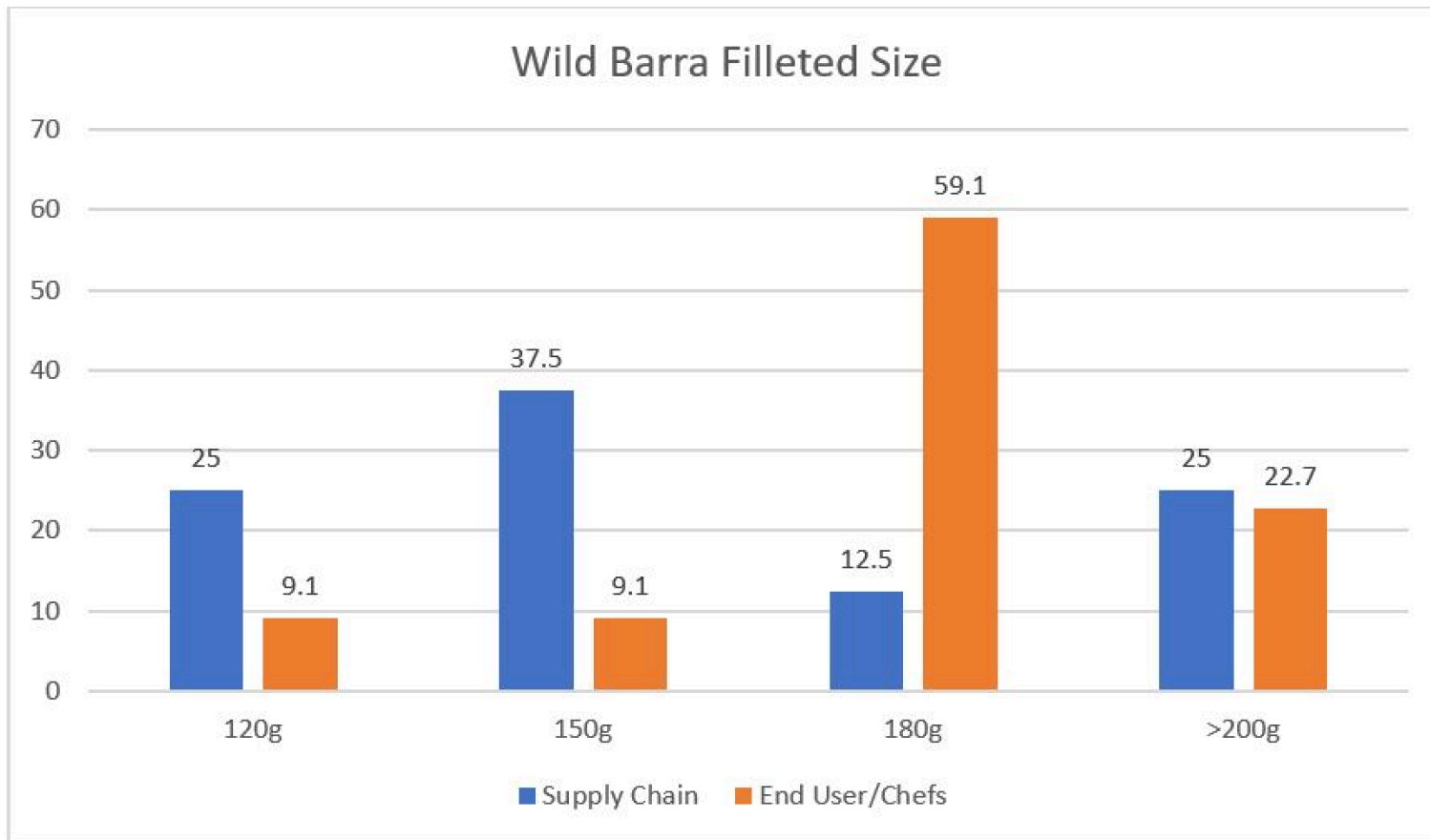


**use instagram to promote their business**



**use facebook to promote their business**

## Fillet size



# Sustainability

| Ꝁ                     | Sustainability-PackagingꝀ |                  |
|-----------------------|---------------------------|------------------|
| ResponseꝀ             | Supply-chainꝀ             | End-Users/ChefsꝀ |
| Not-at-all-ImportantꝀ | 6.3Ꝁ                      | 3.3Ꝁ             |
| Little-ImportantꝀ     | <b>43.8Ꝁ</b>              | 16.7Ꝁ            |
| Somewhat-ImportantꝀ   | 25Ꝁ                       | 16.7Ꝁ            |
| ImportantꝀ            | 25Ꝁ                       | 6.7Ꝁ             |
| Very-ImportantꝀ       | -Ꝁ                        | <b>40.0Ꝁ</b>     |



# Storytelling

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



## Provenance (supply chain)

Often select “NO storytelling would not influence purchase, however they also said:

- 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).
- My customers regularly come in and ask us to reconfirm whether the barramundi is wild caught (which it always is). At point of plate, we want it noted if it is wild caught or a farmed product; in addition to country of origin labelling.
- Yes, a certain amount of storytelling (not down to every fact/too detailed). E.g. Caught in the Gulf of Carpentaria, on this date....

Was there anything that surprised  
you?

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# What to do next?

Developing an action plan

# 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



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# Market development and positioning

Be found

Become known

Be local

Become niche

Be responsive

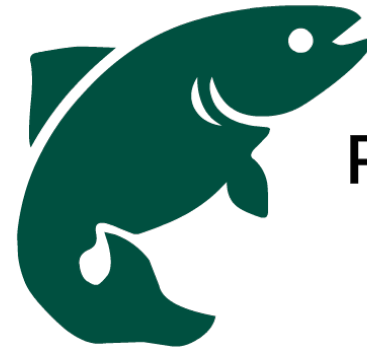
Become innovative



# Develop a provenance story for wild Barramundi



People

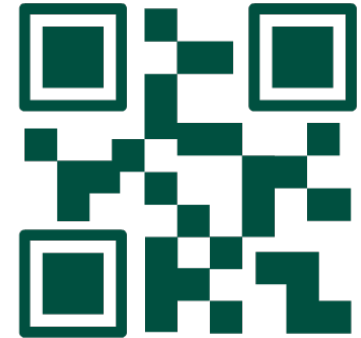


Product

Place



Proof



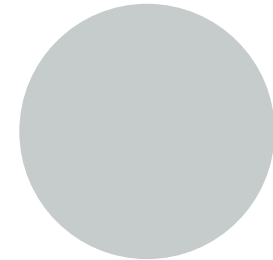
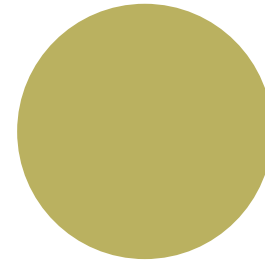
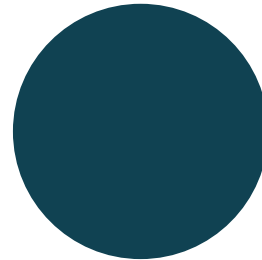
# Develop trust mark concepts

to distinguish authentic wild product from others



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Australian wild  
BARRAMUNDI





# Create an Australian wild barramundi website

## Fisher profiles



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JOIN OUR MAILING LIST

Barramundi from the Northern shores to your plates

We pride ourselves on everything we do, from long journeys at sea, to mastering that premium catch to share on our tables with you all.


From the Duggan's

Barramundi Specifications


The annual commercial barramundi fishing season in the Northern Territory (NT) is from 1 February to 30 September.

Barramundi can grow up to 150 Cm in size and 60Kg in weight, but are typically marketed up to 120 cm and 0.5 to 10kg in weight


Habitat: Saltwater, estuarine and freshwater after spawning in saltwater, juvenile barramundi migrate into tidal creeks and then disperse over inundated floodplains.



Feb - Sept

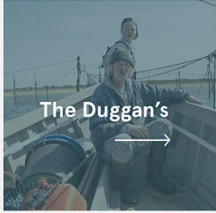


150cm/60kg




Saltwater habitat

Our barramundi fishers




The Duggan's




Greg Johnston

Where we fish Barramundi

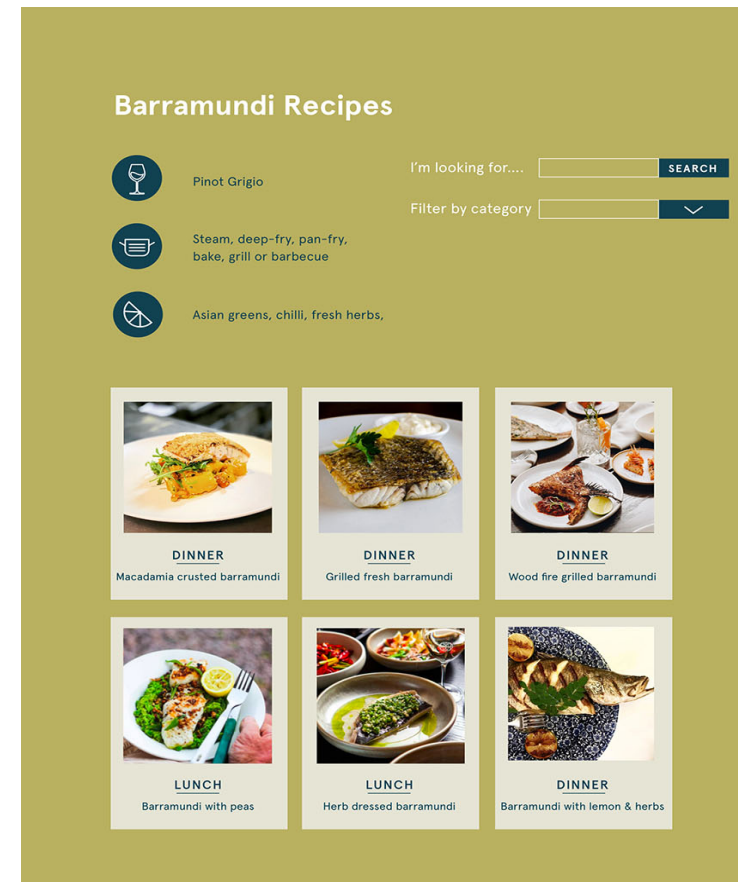
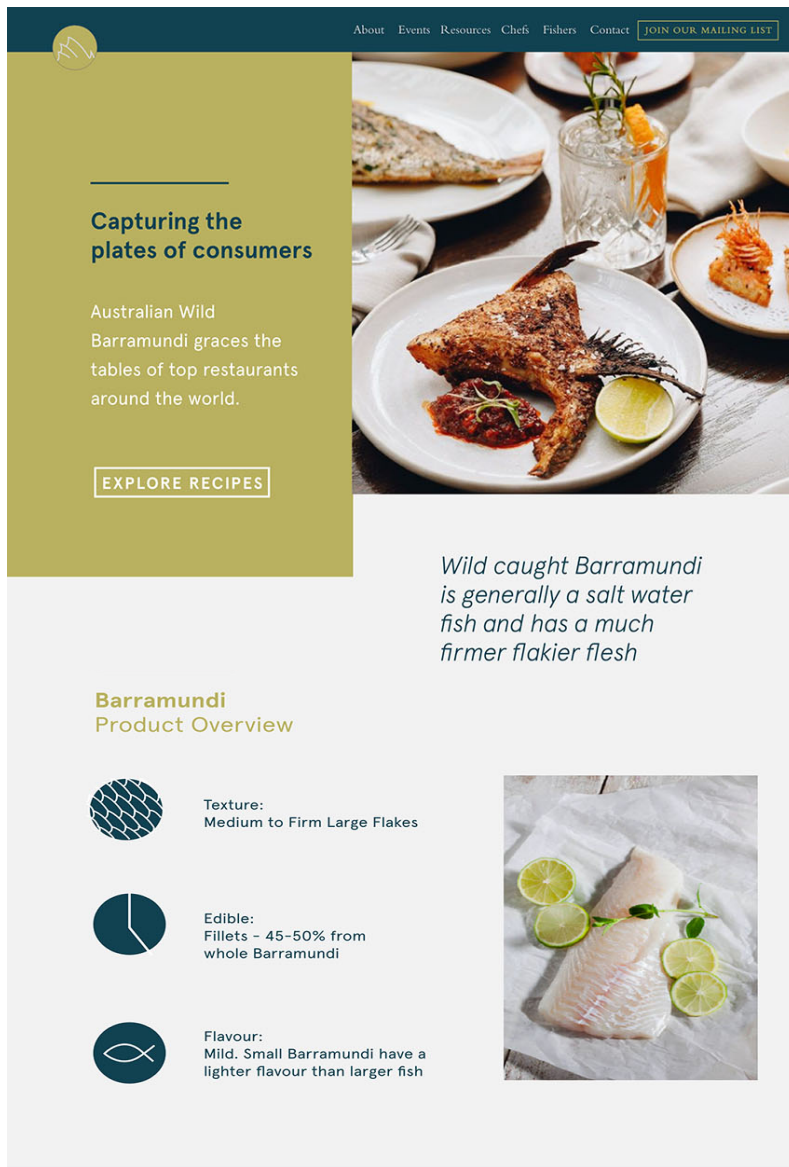
Australian Wild Barramundi stocks lie across Western Australian, the Northern Territory and Queensland, in particular in the southern Gulf of Capentaria sea region.





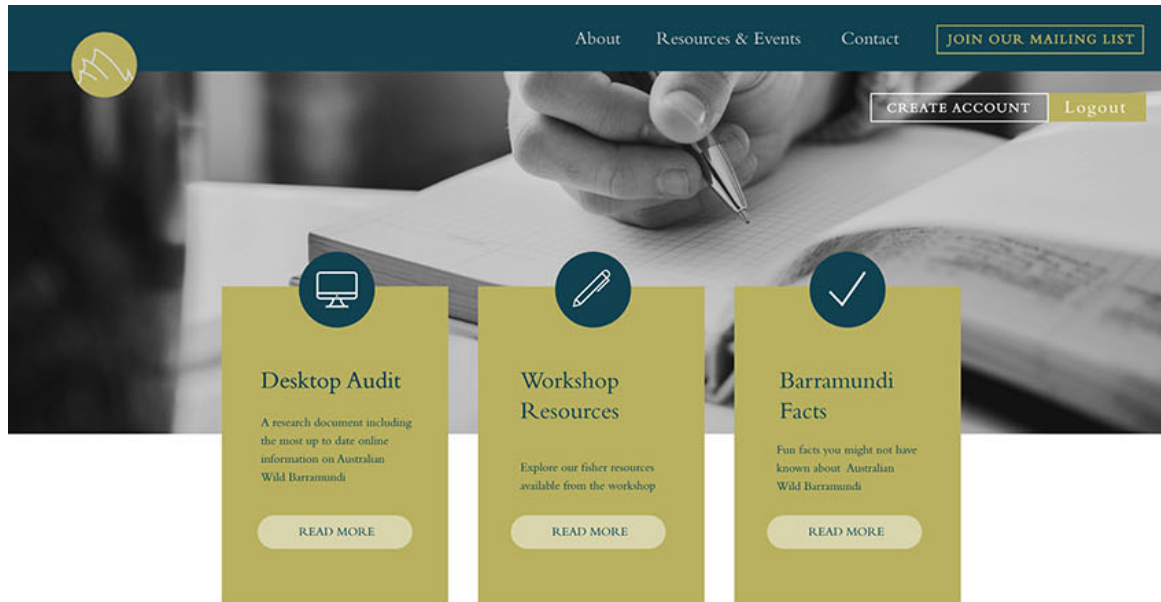
# Australian wild barramundi website

Chefs and  
consumers want  
recipes!



# Australian wild barramundi

## Provide resources and information (facts)



### Resources

Create an account and log in below to access the exclusive resources for Australian wild barramundi fishers.

LOGIN

Email

Password

CREATE AN ACCOUNT

NAME

EMAIL

COMPANY

MESSAGE

SEND

### Resources

A few of the resources available to you include:

-  Insights into the drivers and barriers in demand for wild caught barramundi across the different industry sectors.
-  New packaging, presentation and quality opportunities to improve market share for wild caught barramundi.
-  Resources that can be used by barramundi fishers to develop, trial and evaluate new product packaging formats, product presentation and quality requirements targeting the needs of the food service and hospitality sectors.

[EXPLORE FISHER RESOURCES](#)



Australian Wild  
BARRAMUNDI  
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This project is funded by the Fisheries R&D Corporation and led by Honey and Fox Pty Ltd in collaboration with Curtin University and the University of the Sunshine Coast. For more information about the project please contact Honey & Fox Pty Ltd [team@honeyandfox.com.au](mailto:team@honeyandfox.com.au)

About  
Events  
Resources  
Chiefs  
Fishers  
Contact

STAY UP TO DATE



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Next steps in the  
project



## Objectives

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To identify and document resources to trial and evaluate new packaging formats, product presentation and quality parameters targeting the food service and hospitality sectors

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

Product

1. Quality specifications
2. Supply chain monitoring
3. Code of Practice

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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



Curtin University

## Market development and positioning strategy

1. Project website and private Facebook group set up for communications and sharing of resources
2. Whole of industry positioning including: trust mark (branding logo) concepts, consumer facing education website etc
3. Market development handbook

# What ideas do you have for capturing opportunities and addressing barriers?

Contacts:

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Joanne Freeman (0409080208)

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BARRAMUNDI

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