



## Honey & Fox

**Project:** Investigate changes in acceptance of wild caught Barramundi in the foodservice and hospitality market sectors

**Interview Transcripts combined**

### Research Objective

To understand what the fishers perceive as the drivers and barriers in demand for wild caught barramundi.

### THE FISHER

NT		QLD	
License	Boats	License	Boats
8 licences	3	Own 2, leases 1	1 primary, 4 dorys
Own	1	Own	6 boats high speed
Leases license	2	Lease	vessel \$3million
Lease	7	Own	Latest boat cost
0.3 of a Barramundi	Mothership, 3 x 24	Own	\$1million dollars
license,	footer and 4 x 28	Own	1 boat
	footers and dinghy	Own	1 boat
			1 boat
			6 boats (2 X 11m, 7m, 3 X 5m)

### THE BARRAMUNDI PRODUCT

**Barramundi is devalued! More work has to go into creating value for this product.**

NT	QLD
Price – improve quality and promote provenance	Price – price takers not price setters
Format – consistent supply of fresh an issue	Lessor known species – should have more value
Lessor known species – can do more to promote	Format – whole fish is harder to do
Farmed – consumers don't know the difference	Industry pathway – needs to be more attractive

**Wild caught Barramundi holds the premium position in the market but has issues with consistent supply, size and price.**

NT	QLD
Quality/Handling – need to improve	Quality/Handling – need to improve
Grading – understand market needs	Logistics – Kurumba, impact quality
Food Service – opportunity for portion sizes	Supply – seasonal product promotion
Provenance – need to promote	

**Very little value-adding is currently being conducted across the industry. Filleting is the only value add. What about the swim bladder and wings which are highly sought after as a delicacy in China.**

NT	QLD
Swim bladder, wings etc – lack of market understanding Lessor known species – consumer education needed	Swim bladder, wings etc – doing lots Lessor known species – more emphasis on the whole catch Packaging – explore as a value add

## YOUR PRODUCT

**What format/s do you sell? How much per kg have you caught this season?**

Format	NT	QLD
Whole chilled	✓✓	✓✓
Whole frozen	NA	✓
Fillets chilled	✓	✓
Fillets frozen	✓✓✓✓	✓✓✓✓✓✓✓✓

**Probe to understand format selection**

NT	QLD
Quality/Handling – high quality if handled correctly Fresh – goes to Bne, Syd, Mel	Fresh is quicker money for us

**How do you grade your catch?**

Format	NT	QLD
	Size	Size
Whole chilled		Under 8kg and over
Whole frozen		Under 8kg and over
Fillets chilled		
Fillets frozen	Small <1kg Med 1 to 1.7kg Large +1.7kg  Small <1.25 Med <2.5kg  Small <1kg Med 1 to 1.5kg Large 1.5 -2kg X large 2kg plus	Grade by size

**What packaging do you use and how do you package each format?**

Format	NT		QLD	
	Packaging	Quantity	Packaging	Quantity
Whole chilled	Cardboard boxes		Kin bins	300kg, 500kg and 800kg 5kg boxes 10kg boxes
Whole frozen			Kin bins	300kg, 500kg and 800kg 5kg boxes 10kg boxes
Fillets chilled				
Fillets frozen	Individually wrapped fillets layered in box, snap frozen. Branded small, medium and large. Waxed food grade cardboard.  Interleaved in shatter packs  Individually wrapped fillets layered in box, snap frozen  Waxed cardboard boxes	5kg , 7kg and 10 kg box. Individually wrapped. Small fillets packed into sleeves.  5 kg	Use cartons and liners. All fillets individually bagged Interleaved fillets single fillet packaging	5kgs (pensioners) 10kgs wholesalers and restaurants 10kgs 10kgs 5kg boxes 10kg boxes
Other			Barra portions	Portions of approx. 110g to 135g 5kg boxes 10kg boxes

### Probe to understand why specific packaging is used

NT	QLD
Format – frozen being done in 5-10kg boxes Packaging – food service want less packaging	Packaging - It is how we have always done it.  Processing - Limitations boat size

### YOUR BUYER

What do you think are the 3 most important factors (1 being the most important) your MAJOR buyers consider when they purchase your barramundi? and why ie probe.

Type	3 MOST IMPORTANT ATTRIBUTES	
	NT	QLD
Wholesalers	Quality  Reputation  Consistent Supply	Quality  Consistent Supply
Restaurants (Food service)	Provenance  Consistent Supply  Format  Quality	Quality  Consistent Supply  Size
End consumer	Feedback from customers and consumers is almost non-existent  Availability and price	Quality  Consistent Supply  Provenance

**Do you engage with your buyers (wholesaler, food service? If so how do you engage?**

Type	Engagement	
	NT	QLD
End Consumer	Phone/Emails	Phone/Emails Word by mouth Social media Events
Wholesaler	Phone/Emails Social media	Phone/Emails
Restaurants	Phone/Emails  Social Media	Phone/Emails

**In your opinion is sustainability certification important to your MAJOR buyers?**

NT	QLD
Was not important to buyers	Was not important to buyers

**In your opinion is the product provenance/origin important to your MAJOR buyers?**

NT	QLD
NT provenance very important NT is higher quality than Qld Tell provenance through social media	Environment is important QLD provenance is very important Farmed vs wild needs to be promoted

**What is one thing that your buyer could do to help you promote WILD Barramundi? Probe about storytelling.**

NT	QLD
Humanise the story	Work with supply chain Consumer education Work with fishers

### **BARRAMUNDI NEXT STEPS**

**What changes have you seen in buying patterns/preferences and other industry changes generally over past 5 years? Pre and post COVID**

NT	QLD
Too much regulation Less packaging, smaller portions	Consumer preferences have changed Price is not stable

**What do you think are the opportunities and challenges for wild barramundi in the future?**

NT	QLD
<i>Opportunities</i> Work with supply chain Promote lessor know species Marketing Improve Fishery Management Value adding activities  <i>Challenges</i> Quality/Handling Logistics	<i>Opportunities</i> Work with supply chain Promote lessor know species Marketing Quality/Handling Consumer education  <i>Challenges</i> Fishery Management Quality/Handling

**What do you think the industry as a whole could do to further develop/improve the Wild Barramundi industry?**

NT	QLD
Quality/Handling – consistent products Branding Consumer education Work with supply chain	Quality/Handling Branding

**What could individual fishing businesses do to help develop/improve the Wild Barramundi industry?**

NT	QLD
Quality/Handling – adopt a code Become more business focussed	Quality/Handling – adopt a code

**Any other comments**

NT	QLD
1 fisher digital savvy	1 fisher digital savvy