


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

Fisher Perspectives

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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”

Research Objective

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

Data Collection

Depth interviews were conducted during October and November 2020 to gain insight from the barramundi fishers in Queensland and the Northern Territory.

The results are not intended to be generalised but to better understand what the fishers perceive as the drivers and barriers in demand for Australian wild caught barramundi.

An interview protocol was prepared and tested comprising a mix of qualitative and quantitative questions (Appendix 1). The protocol was developed following an review of relevant literature conducted by the University of the Sunshine Coast which provided background on the perceptions of Australian Wild Caught Barramundi generally in the seafood supply chain and food service sectors along with consumer seafood preferences specific to barramundi.

The interview questions were designed to elucidate information relating to:

Part 1: The Barramundi Business

Part 2: The Barramundi Product

Part 3: About the Fisher's Product

Part 4: About the Fisher's Buyer/Customer

Part 5: Next steps for Australian Wild Caught Barramundi

This report combines the responses for parts 3 and 4 together.

To avoid the introduction of interviewer bias, all interviews were conducted by Dr Joanne Freeman and Jayne Gallagher from Honey and Fox Pty Ltd. Each interview took approximately 60 minutes to complete.

The Barramundi Business

In summary fisher participants were represented by location, whether they were leaseholders or licence owners and size of business. To retain confidentiality the number of licenses/leases have not been included in the report.

NT		QLD	
License	Boats	License	Boats
Own	3	Own and Lease	5
Own	1	Own	6
Lease	2	Lease	1
Lease	7	Own	1
Own	8	Own	1
		Own	6

The Barramundi Product

Fishers were asked to provide feedback on previous research findings (refer to Literature Review) specifically regarding the perceived value and positioning of barramundi and the current lack of value adding activities in the industry.

Statement 1: Barramundi is devalued! More work has to go into creating value for this product.

There was consensus that “we” are price-takers, and the industry should work towards being price setters and creating value from the whole catch which includes lessor known species such as Blue Salmon, King Threadfin Salmon, Black Jewfish and Grunter. However, there was concern that the quality was not consistent across the industry which may impact on price.

“Fishers need to control their own market and dictate price”

“Could get a higher price if product is quality and people can be assured that it is wild”

Statement 2: Wild caught Barramundi has issues with consistent supply, size and price.

All fishers interviewed expressed concerns regarding the inconsistent quality of the catch which they believed was having a detrimental impact for the whole industry. There was lots of discussion around improving handling processes onboard and it was agreed that having a code of practice could go a long way to improving “quality” of catch.

“Quality is an issue – landing at chefs’ door in poor quality”

“Fishers that don’t have good handling practices drag the price down due to low quality. Buyers then get wary and won’t come back.”

Statement 3: Very little value-adding is currently being conducted across the industry.

All fishers interviewed fillet fish onboard with the majority snap freezing all product using various grading and packaging options. A few fishers were experimenting with sections of the fish such as throats, belly flap and carcasses. A small volume of Barramundi wings was being sold and usually only if pre-ordered. However, fishers commented that their buyers were not forthcoming in providing information regarding market opportunities for value-adding products.

“Barra throats is an emerging market. Not difficult to process on board”

“Skin chips are big in Singapore – possible opportunity”

“Wings are stockpiled to make it viable to send to the market”

“Processing - boat size is a limitation”

“No feedback from buyers about wanting value-adding product”

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

All but one of the fishers interviewed provided frozen barramundi fillets with 2 fishers also offering fresh whole fish and 1 providing fresh chilled fillets.

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

“Buyers specifically ask for frozen fillets”

“Not viable to do fresh as you have to keep coming to port”

How do you grade your catch?

There was no consistent or agreed industry standard regarding the grading of fillets.

Size	Weight
Small	<1kg <1.25
Medium	1 to 1.5kg 1 to 1.7kg <2.5kg
Large	>1.7kg 1.5 -2kg
Extra Large	2kg plus

“Size grading could be more improved – need to know what the market wants and then work out how to do it onboard”

“Feedback from customers and consumers is almost non-existent”

“There is a mismatch between what the food service sector wants and what is possible on the boat.”

What packaging do you use and how do you package frozen fillets?

Most fishers acknowledged that there was a demand (especially in the food service sector) for more environmentally friendly (or just less of it) packaging. Current packaging options were predominately either individually wrapped fillets layered in box and/or interleaved in shatter packs in either 5kg, 7kg and 10kg boxes.

“Packaging is a cost to the food service sector. Need a biodegradable option”

“Would like to know how restaurants want it packed – how many fillets in the box? Do you want it individually wrapped?”

“Premium food service wants small fish. Fish n chip shops want large fillets”

Buyers/Customers

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

Fishers believed that Quality and Consistent Supply were important to all their seafood buyers be it wholesalers, food service and the end consumer. The fishers indicated that Provenance and Consistent Supply were particularly important attributes for restaurants and the end consumer.

Buyer/Customer	Important Attributes
Wholesalers	Quality Reputation Consistent Supply
Food service	Provenance Consistent Supply Format Quality Size
End consumer	Provenance Consistent Supply Price Quality

“Consistency is a problem for food service sector. Chefs will take it off menus. But this might be a value-add if its only available a certain time of the year”

“Provenance story is driving huge demand for product”

Do you engage with your buyers/customers? If so how do you engage?

All fishers interviewed predominately engaged with their customers/buyers via phone and email. Only two fishers currently utilised social media channels to promote their product and engage with their buyers/customers. Only one fisher actively engaged directly with chefs to promote and receive feedback about their product.

“Wife keeps in touch with all customers mainly by phone and emails”

“Deliver fish personally and talk to the chef every 2-3 weeks”

“I have a good relationship with buyer and ask questions about the market all the time”

In your opinion is sustainability certification important to your MAJOR buyers/customers?

The fishers all agreed that the importance of sustainability certification to their buyers/customers has not yet been a priority, nor has it been a deciding factor when purchasing their product. However, one fisher indicated they were investigating MSC certification and were hoping to implement the sustainability system into their business in the near future.

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

There was very strong consensus that the provenance of the product was very important to buyers and customers. Interesting however fishers from both states suggested that there should be a focus on state-based provenance activities.

“Provenance is the competitive advantage”

“Provenance is driving the demand”

“People want to know it is not farmed”

“Customers want to know where product is from”

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

All fishers agreed that working with the supply chain was important and lack of feedback about market needs and preferences from their buyers was highlighted during interviews.

“Would like to know more about what the market wants”

“Value chain doesn’t appreciate the quality of wild barramundi”

Next steps for Australian Wild Caught Barramundi

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

There was general consensus that buying patterns and consumer preferences had changed but due to lack of feedback from the supply chain some fishers indicated they did not understand the drivers for these changes. There was also agreement that there was a demand for less packaging and portion size was increasing in popularity especially in the food service sector.

There was also robust discussion regarding the impact of regulation on innovation. Some suggested that current regulations needed to be reviewed as it was making it harder and harder to maintain a viable fishing operation.

“COVID has changed consumer preferences”

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

All fishers agreed that they needed to work more closely with the supply chain to better understand market requirements and preferences. An opportunity was identified to build value for other species and therefore maximise the value of the entire catch not just by species. Most fishers interviewed believed that not having a barramundi brand was a missed opportunity. Finally there was also suggestion that there was an opportunity to investigate processing on board to support smaller portion sizes but would need feedback from supply chain.

“Manage the entire chain to minimise peaks and troughs”

“Why wouldn’t you utilise your whole catch? You spend 5 weeks at sea why would you just keep the Barra?”

“Humanise the story – explain how, when, where the fish is caught and what is involved to bring a beautiful quality wild fish to the table”

“Traceability system to ensure provenance”

The two predominant challenges shared by the fishers were (i) the ever growing amount of regulation making it difficult to meet all requirements and maintain a profitable fishing enterprise and (ii) the inconsistent product quality being sold in the market. All fishers agreed that a code of practice to improve onboard processes would be of benefit to the whole industry.

“A standard is key!”

“Educate the fishers – volume isn’t the answer. Can make more money catching less fish as long as they are high quality.”

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

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

From a whole of industry perspective and an individual business perspective, discussion focussed on the importance of consistent quality of product and the need for the whole industry to adopt a code of practice. However, some fishers indicated that this may prove challenging to implement a voluntary code of practice and that not all fishers would be receptive to this type of initiative.

“We need to focus on quality and not on volume. Poor quality product affects us all.”

“There is a price difference for quality – upgrade quality”

“Code of Conduct/Handling for all fishers would be good if you could. It will add value and some won’t do it.”

Appendix 1 – Fisher Interview Protocol



Honey & Fox

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

Research Objective

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

PART 1: THE BUSINESS

Date	
Name of business	
Participant name	

Can you tell us how you got involved in the barramundi industry?

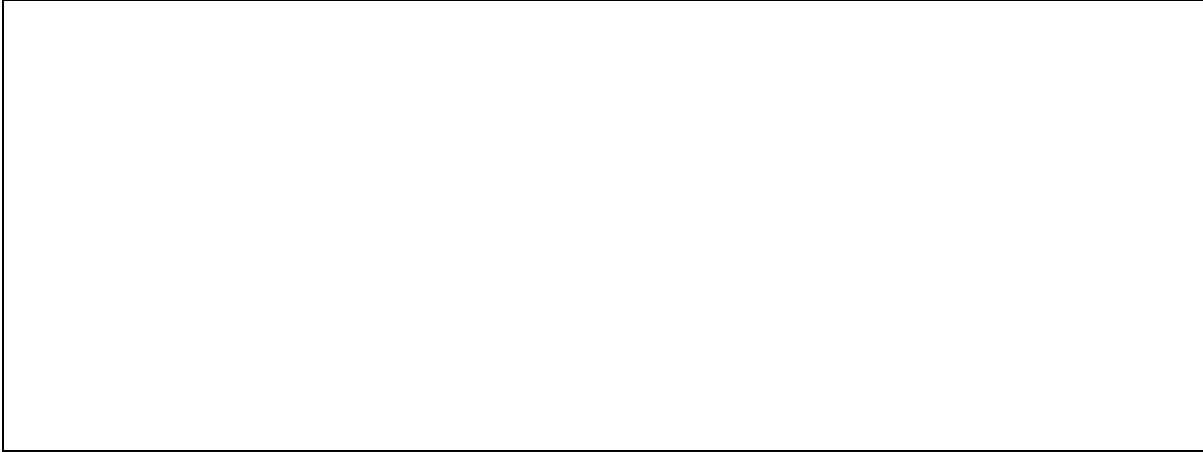
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Lease or own	
Years in position or business owner	
Number of boats	
Number of staff	
Other	

PART 2: THE BARRAMUNDI PRODUCT

I am really interested to hear your views about some statement that have emerged in previous industry research over the past 2 years.

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

A large, empty rectangular box with a thin black border, intended for a response to the statement above.

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

A large, empty rectangular box with a thin black border, intended for a response to the statement above.

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.

A large, empty rectangular box with a thin black border, intended for a response to the statement above.

PART 3: YOUR PRODUCT

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

Format	✓	Kg
Whole chilled		
Whole frozen		
Fillets chilled		
Fillets frozen		
Other value added products Provide details:		

How do you grade your catch?

Format	Size	Weight
Whole chilled		
Whole frozen		
Fillets chilled		
Fillets frozen		
Other value added products Provide details:		

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

Format	Packaging	Quantity
Whole chilled		
Whole frozen		
Fillets chilled		
Fillets frozen		
Other value added products Provide details:		

PART 4: YOUR BUYERS/CUSTOMERS

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

Buyer	Type	3 MOST IMPORTANT ATTRIBUTES
1		
2		
3		

Do you engage with your buyers/customers? If so how do you engage?

Buyer	Type	Y	N	Engagement
1				
2				
3				

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

No at all important				Very Important	
1	2	3	4	5	
Comments					

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

No at all important				Very Important	
1	2	3	4	5	
Comments					

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

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PART 5: 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

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

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

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

Any other comments

Thank you for your comments, thoughts and input regarding wild barramundi. If we require any further information or clarification from you is it okay for us to contact you?