

FINAL REPORT

Seafood Trade Advisory Group

Transitioning to a new communications, governance and operating model

Jayne Gallagher, Andrew Robertson

December 2024

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Seafood Trade Advisory Group - transitioning to a new communications, governance and operating model

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In submitting this report, the researcher has agreed to FRDC publishing this material in its edited form.

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STAG Funding Partners

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STAG Chair

Nathan Maxwell McGinn, JSJ Seafood and Three Capes Marketing

Members of the Lobster Working Group

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Abbreviations

ACA Abalone Council Australia

Austrade The Australian Trade Commission

CIFER China Imported Food Enterprise Registration

CIIE China International Import Expo

ERL Eastern Rock Lobster

GACC General Administration of Customs of the People's Republic of China

LWG Lobster Working Group NRS National Residue Survey

SECC Seafood Export Consultative Committee

SEMSP Australian Seafood Export Market Strategic Plan

SIA Seafood Industry Australia

SMAWG Seafood Market Access Working Group

STAG Seafood Trade Advisory Group

STMAAP Seafood Trade and Market Access Agenda and Action Plan

TIQ Trade and Investment Queensland

TRL Tropical Rock Lobster WRL Western Rock Lobster

WRLC Western Rock Lobster Council
WTO World Trade Organisation

Executive Summary

Maintaining existing market access while removing barriers in new markets will underpin the future growth of Australia's seafood exports. In the past five years, there have been many disruptions to trade, small and large.

The Seafood Export Market Strategic Plan (SEMSP) developed by Seafood Industry Australia (SIA) in 2022 aims to achieve exports worth \$2 billion annually by 2030. To achieve this, 125 seafood businesses are anticipated to become new exporters.

With a successful track record in addressing international seafood trade issues, the Seafood Trade Advisory Group (STAG) has played a vital role in progressing towards this goal. However, as the international seafood trade environment grows increasingly complex on both technical and political fronts, disruption events and system changes are likely to occur more frequently. Industry, government, and research organisations must continue to invest in people, systems, and processes to support the anticipated expansion of international trade outlined in the SEMSP.

As part of implementing the SEMSP, the STAG had the opportunity to move to a new, expanded business model under the auspices of SIA, capitalising on the resources and capacities of both organisations. It was agreed that a new business model was needed to broaden the funding base and expand the scope more explicitly to include other seafood exporting sectors. This would support, maintain, and expand export market opportunities for new, emerging, and experienced Australian seafood exporters and build additional seafood-specific international trade knowledge and capacity.

This project aimed to support the transition while providing the research and support necessary to sustain existing markets and develop new ones, particularly for the Abalone and Rock Lobster sectors. Additionally, the project focused on addressing disruptions in the live rock lobster trade with China.

Throughout this project, the STAG secretariat collaborated with the STAG Partnership Group to facilitate a smooth transition of trade and market access research, development, and extension services from the STAG to SIA. Some STAG functions have already transitioned, while the rest are poised for transfer once the SIA Trade Unit funding is approved, and staff are in place to take over.

In addition to supporting and facilitating the transition to the new Trade Unit, the STAG Secretariat:

- 1. Worked with the STAG Partnership Group to review and update the Seafood Trade Action Plan (for abalone and rock lobster) to agree on priorities and the work program. This included:
 - a. pursuing reopening of the China market for live rock lobster
 - b. working with SafeFish and DAFF to review the National Residue Survey (NRS) program to develop and agree on a "fit for purpose" program for abalone and rock lobster
 - c. supporting the transition to the new establishment registration system for China
 - d. establishing an agreed market access priority-setting process (with DAFF, Safefish, SIA and SECC)
 - e. pursuing access for wild-caught abalone to Canada
- Continued undertaking market intelligence activities and communicating findings through the STAG newsletters (STAG NewsBites and Seafood Trade Matters). The STAG also conducted a subscriber survey to assess satisfaction and identify any information needs gaps
- 3. Monitored international trade and market access issues, bringing specific issues to the attention of the industry and coordinated industry input/responses as needed
- 4. Maintained the capability to quickly respond to market disruptions and coordinate initial containment and response activities as needed
- 5. Facilitated the Lobster Working Group operations and liaised with FRDC, SafeFish and other organisations as needed

6. Participated in SECC meetings, SafeFish partnership meetings and other consultative forums (DFAT, DAFF, Austrade), providing input and collaborating on relevant initiatives as needed.

In addition, the review of STAG communications, the Market Access Priority Setting Framework and the China market engagement work completed and detailed in this report provide a solid foundation for the operations of the new SIA Trade Unit helping to ensure no disruption to existing trade and market access activities.

While the transition to a new Trade Unit had not been completed as planned by June 2024, significant progress has been made, and it is expected to be operational during 2025. To support the ongoing trade and market access development needs of the Australian Seafood industry, it is recommended that SIA:

- A well-credentialed, qualified trade analyst should continue to be engaged to undertake the
 trade and market access negotiation components of the Seafood Trade Agenda and Action Plan
 2024-2026. This will ensure no disruption in activities at a critical stage in resuming and growing
 trade with China and the continuation of support for market diversification efforts to reduce
 reliance on China.
- 2. Use the work done through this project and the outputs it has developed to continue building support for international trade and market development activities, as per the SEMSP.
- 3. Continue to work with the STAG foundation partners (ACA, SRL, and WRL) to deliver on their priorities while seeking new investment from other industry sectors and help them to articulate and achieve their respective priorities.
- 4. Ensure that specific seafood trade and market access development skills are built in government, research and industry to support the desired export growth, as detailed in the SEMSP.

While preparing this report, some trade and market access challenges remain unresolved. Some, such as regaining access to China for lobster and the China-approved species for import from Australia, will require long-term and sustained effort. Therefore, building industry, government, and research capabilities should remain a key objective of the SIA Trade Unit moving forward.

Future extension and communication activities could include online webinars/podcasts and facilitating industry forums to provide opportunities to collaborate and learn from each other. These activities should be based on the industry needs and the international market activities that are happening at the time. Due to the commercially and politically sensitive nature of trade, it is suggested that social media is inappropriate for communications.

Note: On December 20th, 2024, it was announced that access to export live rock lobster (3 species) between Australia and China would resume. See the announcement here.

Keywords

international seafood trade, international market access, Abalone, Rock Lobster, trade barriers

Introduction

A well-informed, capable seafood export sector will support individual business to achieve their international market development objectives and the general growth of the seafood sector. The Seafood Industry Australia (SIA) Export Market Strategic Plan developed in 2022 aims to achieve exports worth \$2 billion annually by 2030. With a track record of success in responding to and addressing international seafood trade issues, the Seafood Trade Advisory Group (STAG) has a critical role in achieving this goal.

Established in 2013, the STAG has worked with Australian abalone and rock lobster exporters to provide well-researched, considered input to trade and market access negotiations to maintain current market access, resolve disruptions to trade and negotiate new access to international markets for seafood.

With a track record of success and a proven collaborative priority-setting process, the STAG has primarily focused on the issues faced by abalone and rock lobster exporters. Many of the STAG activities benefited the broader seafood exporter community, e.g. the International Freight Assistance Mechanism, tracking and communicating impacts of the COVID pandemic on markets, facilitating an agreed priority listing for adding new species to the approved import list for China, and establishing a market intelligence service with weekly newsletters keeping Australian seafood exporters up to date on market trends and consumer insights as well as technical market access issues.

As part of implementing the SIA Seafood Export Development Plan, there was an opportunity for the STAG to move to a new expanded business model under the auspices of SIA, capitalising on the resources and capacities of both organisations. It was agreed that a new business model was needed to broaden the funding base and expand the scope more explicitly to include other seafood exporting sectors. The aim would be to support, maintain and expand export market opportunities for new, emerging and experienced Australian seafood exporters, as well as to build additional seafood-specific international trade knowledge and capacity. What the new SIA Seafood Trade Unit should look like and how that transition from the STAG should occur was a key focus of this project.

With a highly volatile international trade environment, abalone and rock lobster exporters invested in developing and implementing market diversification strategies while trying to maintain/regain China's market access and positioning. It was, therefore, imperative that the STAG continue to provide services and address high-priority trade and market access issues during the transition period. Additional support was provided to aid market diversification via SIA's ATMAC program funding.

With a planned outcome that Australian seafood exporters have access to expertise, training, and support for maintaining existing and expanding to new international markets as they work towards achieving their own business goals and the industry goal of exports valued at \$2 billion by 2030, it was agreed that this project would comprise two distinct yet linked work programs.

- STAG/SIA transition program
- STAG continuation of service

The following outputs were planned to be delivered during the project

- STAG transition plan
- Seafood Trade Agenda and Action Plan 2024-2026 for Abalone and Rock Lobster
- Weekly STAG newsletters (STAG NewsBites and Seafood Trade Matters)

Objectives

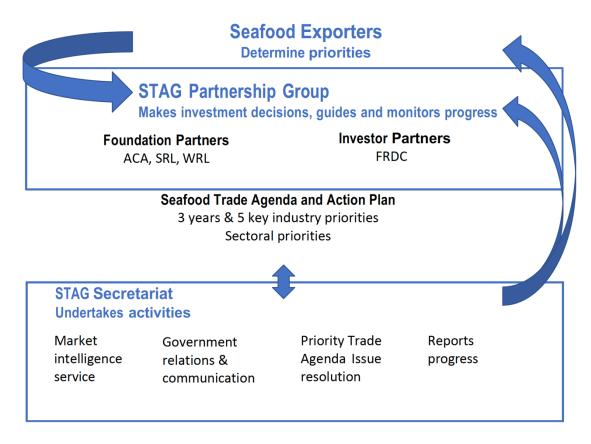
The objectives of this project were to:

- 1. Develop and implement agreed arrangements to transition the STAG to a new business model (communications, governance, operations and funding) within the SIA
- 2. Deliver agreed trade and market access services according to the agreed Seafood Trade Agenda and Action Plan for Abalone and Rock Lobster

Method

Project Governance

The project was managed under the STAG Governance arrangements outlined below:



The core function of the STAG is to provide a unified, well researched position to the Australian government about the Abalone and Rock Lobster industry priorities for trade and market access. To achieve this goal a small secretariat is maintained with funding from ACA, SRL and WLRC through their Industry Partnership Agreements with the FRDC. The STAG secretariat, provided by Honey & Fox, was responsible for:

- 1. Consulting with Abalone and Rock Lobster exporters and industry associations to determine and agree on trade and market access priorities.
- 2. Developing and implementing the Seafood Trade and Market Access Agenda and Action Plan.
- 3. Maintaining government relations and providing seafood input to Australia's trade and market access policy and negotiations.

- 4. Communicating with stakeholders (industry, government and communities) about seafood industry trade and market access priorities.
- 5. Researching and providing a market intelligence service to seafood exporters.
- 6. Developing and maintaining relationships with key organisations (industry, research and government) in key markets.
- 7. The Secretariat is responsible for working groups and committees developing specific terms of reference as needed. A Lobster Working Group (LWG) was formed in October 2020 to guide the response to the sudden market access problem for Australian live rock lobsters to China.

STAG Partnership Group

The Partnership Group comprises representatives from the key investor organisations involved in the STAG. Currently, the Partnership group comprises Abalone Council Australia, Southern Rock Lobster Ltd, Western Rock Lobster Council (WRLC) and the Fisheries Research and Development Corporation (FRDC).

The Partnership Group has a key role in ensuring broad stakeholder input to developing the STAG Trade Agenda and priorities and ensuring that communication about those priorities is promulgated far and wide. The Partnership Group also undertakes a governance role in monitoring and managing their investment.

STAG Transition Program

The STAG and SIA collaborated to develop and implement an agreed transition plan, including timetable, roles, responsibilities, and actions). To do this, a Transition Guidance Group comprising the CEO/GM of SIA and the STAG was established and were tasked with agreeing the parameters of the transition arrangements and implementing these by July 2024.

Priority Market Access Issues

While the transition program was being developed and implemented, the STAG Secretariat:

- 1. Worked with the STAG Partnership Group to review and update the Seafood Trade Action Plan (for abalone and rock lobster) to agree on priorities and the work program. This included:
 - a. pursuing reopening of the China market for live rock lobster
 - b. working with SafeFish and DAFF to review the NRS program to develop and agree on a "fit for purpose" program for abalone and rock lobster
 - c. supporting the transition to the new establishment registration system for China
 - d. establishing an agreed market access priority-setting process (with DAFF, Safefish, SIA and SECC)
 - e. pursuing access for wild-caught abalone to Canada
- 2. Continued undertaking market intelligence activities and communicating findings through the STAG newsletters (STAG NewsBites and Seafood Trade Matters). The STAG also conducted a subscriber survey to assess satisfaction and identify any information needs gaps
- 3. Monitored international trade and market access issues, bringing specific issues to the attention of the industry and coordinated industry input/responses as needed
- 4. Maintained the capability to quickly respond to market disruptions and coordinate initial containment and response activities as needed
- 5. Facilitated the Lobster Working Group operations and liaised with FRDC, SafeFish and other organisations as needed
- 6. Participated in SECC meetings, SafeFish partnership meetings and other consultative forums (DFAT, DAFF, Austrade), providing input and collaborating on relevant initiatives as needed.

Details on how these were delivered are provided in the Results Section of this report.

Project Variation

The STAG functions were originally due to transition to SIA by the end of June 2024, however, there was a delay in obtaining funding for a new and expanded SIA Trade Unit. This created the potential for a gap in service at a critical time where eased political tensions with China and the restoration of the trade relationship had created a window of opportunity for Australian live rock lobster exporters to regain and expand access to their most important market.

In May 2024 the STAG partners agreed to fund a variation to the project that focused on establishing a pathway to support the rock lobster and abalone industries' engagement with China and realign important relationships with Chinese counterparts. The following activities were undertaken by STAG:

- Worked with government agencies on behalf of the rock lobster and abalone industries on the following China-focused priorities (as detailed in the Seafood Trade Agenda and Action Plan 2024-2026)
 - Restoration and smooth facilitation of trade in live rock lobster to mainland China
 - Restoration of trade in Tropical Rock Lobster with mainland China
 - Resolution of current health certificate issues with China
- Supported execution of the SIA 'China Engagement Plan' and supported lobster and abalone
 industries to establish and maintain relationships with key influencer organisations in China,
 including support for industry delegations to China in August and November 2024
- Sourced and analysed market intelligence on rock lobster and abalone trade issues globally and curated and distributed the STAG News Bites and Trade Matters newsletters.

Results and Discussion

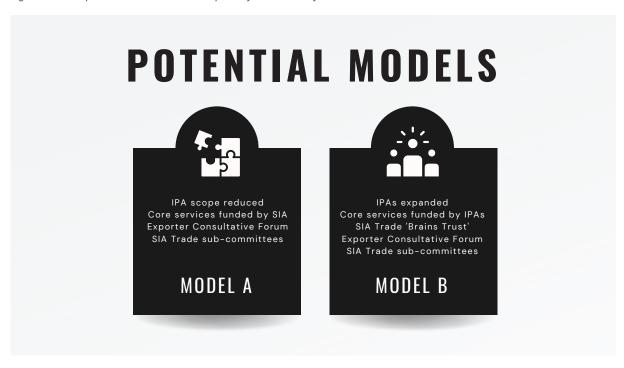
STAG Transition to SIA

The Transition Guidance Group, comprising the CEO/GM of SIA and STAG, met on 22 February 2023 to establish the parameters of the transition plan and agree on fundamental issues that needed to be resolved. As an outcome of this meeting, the STAG secretariat prepared an Issues Paper to guide discussion and identify key areas for attention.

With the Issues Paper as a starting point, STAG Senior Trade Policy Analyst Andrew Robertson held detailed consultations separately with FRDC (12 April 2023), ACA (12 April 2023), WRL (1 May 2023), SRL (3 May 2023), and STAG Chair Nathan Maxwell (9 May 2023). Attachment 1 provides a summary matrix cross-referencing the partner's views with the issues identified in the Issues Paper.

Based on these discussions, the STAG identified two potential business model options for a new Seafood Trade Unit operating within SIA. These are summarised in Figure 1 below and detailed further in Attachment 2, referencing the consultation process, proposed functions, funding, and structural arrangements provided to SIA for consideration.

Figure 1: Initial potential business model options for a new Seafood Trade Unit



The Transition Guidance Group met again on 5 July 2023 to discuss the business model options focusing on the consultation processes, proposed functions, funding, and structural arrangements. Key determinations on these matters required guidance from the SIA Board, as they had significant implications for the transition plan's outcomes and progress. The STAG secretariat developed a discussion draft to guide these considerations.

A timetable to finalise the transition by July 2024 was developed (Attachment 3) and agreed to by SIA. This is the timetable that guided the transition program.

The Transition Guidance Group met again several times during February and May 2024 to review progress against this timetable. In May 2024, the Transition Guidance Group and the STAG Partnership Group agreed that the transition was not on track to be completed as planned due to the lack of approved funding arrangements for SIA to continue the STAG functions.

In preparation for presenting an investment prospectus for funding beyond June 2024, SIA drafted Terms of Reference setting out the basic structure and role of an SIA "International Trade Committee" (ITC). Key points from this terms of reference include:

Purpose: The International Trade Committee (ITC) will provide strategic direction and leadership to SIA in the international trade areas of market access, trade capacity and trade development to achieve growth in the value of Australian seafood exports to \$2 billion by 2030 (as per Seafood Industry Export Strategic Plan). To achieve this the ITC will look to:

- 1. Increase the amount (volume) of seafood exported;
- 2. Pursue a premium pricing for Australian seafood products;
- 3. Strengthen trade and relationships with existing markets and expand into new markets;
- 4. Increase the capabilities and number of seafood exporters;
- 5. Focus on capacity and capability development in trade advocacy and representation.

Role and Responsibilities: As an SIA advisory committee, the ITC will consider issues impacting the Australian seafood industry and to advise the CEO on appropriate actions. The key objectives of the ITC would be to:

- Review and maintain the Australian Seafood Industry's Export Market Strategic Plan for the benefit of the Australian seafood industry;
- Develop an action plan (review and adopt the approved STAG Trade Agenda 2024-2026; upon establishment of the ITC)
- Oversee the execution of an action plan through SIA personnel;
- Monitor and assess activities and projects for effectiveness and value to industry;
- Provide knowledge and advice to SIA personnel to advocate on behalf of industry to relevant stakeholders as required.
- To increase capacity and capability in industry amongst seafood exporters
- Act within the established SIA governance structure, subject to SIA board guidelines.

Scope: As an SIA advisory committee, the ITC will support SIA across a number of activities including:

- Advocacy and Stakeholder Engagement advocacy positions and activities; government at all levels and technical resources such as SafeFish
- Member Consultation Oversee the engagement process and results
- Industry Consultation as required in ad hoc activities;
- Industry Communications (Review and adopt STAG's trade news into SIA trade desk news)
- Crisis Response planning and activities.

Members will eventually be drawn from across the industry, with the STAG IPA Partners Group as the founding membership.

In June 2024, SIA prepared a prospectus (Attachment 4) to establish a new SIA Trade Unit that, subject to funding approval, would be operational by 1 October 2024. Due to significant concerns about disruption in STAG services at a critical time when negotiations to reopen the China market for live Rock Lobster were making some headway, a project variation was approved to continue support for these negotiations and China market re-engagement.

Interim transition arrangements for STAG functions were agreed at the end of June 2024 as follows:

- SIA's Export Crisis Management Framework would be used for future trade disruption events for Abalone and Rock Lobster exporters.
- The STAG website will be closed when the transition is complete, with STAG Newsletters (including a library of previous editions) to be available on the SIA website www.exportingseafood.com.au
- The STAG News editor and the SIA Trade Officer will collaborate on the weekly newsletter content. The STAG secretariat will continue to publish the newsletters until the new SIA Trade Unit is established or 31 December, whichever is the earliest.
- STAG would continue to provide the secretariat to the Lobster Working Group (LWG) until the SIA Trade Unit is established. Noting that SIA joined the LWG in late 2023 to coordinate advocacy activities as agreed by the LWG.
- The initial SIA market access work program is detailed in the Seafood Trade Agenda and Action Plan 2024-26 (Attachment 5). STAG and SIA will convene weekly at the working level to share information and ensure consistency and visibility of all relevant market access activities. They will also participate jointly as appropriate in all relevant meetings with government and industry stakeholders.

Seafood Trade and Market Access Agenda and Action Plan

The Seafood Trade and Market Access Agenda and Action Plan (STMAAP) details the trade and market access priorities as determined by the Abalone and Rock Lobster sectors (Attachment 5).

As part of the transition to SIA, the Seafood Trade and Market Access Agenda and Action Plan (STMAAP) was updated during FY 2023/2024, beginning with a review of the global seafood trade environment. The

review describes Australia's seafood export performance and the global trade environment over the previous Trade Agenda and Action Plan period. It looks at the overall breakdown of trade by major exported species and significant markets, examines rock lobster and abalone export performance and trade outlook, provides background on market disruptions, and describes developments in Australia's network of Free Trade Agreements.

The review provides the context for an updated set of agreed-upon trade and market access priorities, developed through a consultation process involving the STAG partnership group and individual exporters. The consultation included a series of in-depth interviews and an online survey.

The priorities outlined in the document are focused on the Abalone and Rock Lobster sectors, given they are the primary/only industry partners of the STAG, while also including "whole of industry" priorities. A summary of these priorities is provided below (Tables 1, 2 and 3).

Table 1: Rock Lobster Trade and Market Access Priorities (2024-2026)

| Issue | Impact | Desired outcome |
|--|--|---|
| Restoration of access for live lobster to mainland China | The disruption caused by this issue has been extensive. Even if access is restored, efforts will be needed to facilitate trade back to prepandemic levels. | Smooth resumption of trade with mainland China, including documentation, testing regimes, import permits, and quotas. |
| Restoration of access for Tropical Rock Lobster to China | Tropical Rock Lobster (<i>Panulirus Ornatas</i>) has been listed as a protected species in China, prohibiting import to China of wild-caught product from any country. | Removal of Tropical Rock Lobster (<i>Panulirus Ornatas</i>) from protected species status in China trade resumed. |

Table 2: Abalone Trade and Market Access Priorities (2024-2026)

| Issue | Impact | Desired outcome |
|--|--|--|
| Reduction of tariffs for South Korea | Current high import tariffs on Australian abalone (20%) restricts the ability for Australian product to access previous niche live markets for which there is known demand for the larger size wild-caught fish. | Zero tariff to be applied to all Australian abalone imports. |
| Respond to market access challenges arising from abalone viral ganglioneuritis | The outbreak of Abalone viral ganglioneuritis in South Australia is a serious biosecurity issue with potential implications for overseas market access. | Industry is alert to market access restrictions and ready to respond nationally in a coordinated manner. |
| Approval for use of SO ₂ in preserved abalone in key markets | SO ₂ is approved by CODEX for use as an antioxidant and as an anti-browning (bluing) agent. Restrictions in key markets may impede growing exports of canned and pouched product to diverse markets. | SO ₂ approved for use in canned abalone at an appropriate level in target markets. |

Table 3: Overarching Seafood Industry Trade and Market Access Priorities (2024-2026)

| Issue | Impact | Desired outcome |
|--|--|---|
| China approved species list | The limited approved species list for non-viable seafood products is impeding export growth to China. The loss in export earnings is estimated in the millions of dollars each year. | Acceptance by Chinese authorities of all requested Australian species. |
| Export Documentation and Processes | The current arrangements for printing and issuing Health Certificates for China are not adequate with antiquated equipment that can cause significant delays for exporters time-sensitive products such as live seafood (not only Rock lobster). It is hoped these issues will be resolved with the implementation of the NEXTDOC system scheduled for 2024. | New arrangements that do not require the physical printing of health certificates for exports to China. A smooth transition to NEXDOC as scheduled in 2024. |
| National Residue Survey (NRS) program review | The current NRS program does not provide adequate data on key residues of importance to the rock lobster and abalone export industries. The lack of such a program was a key complicating factor in efforts to restore China market access. | Options identified within the current budget for a 'fit-for-purpose' wild catch program that provides better support for market access negotiations. |
| Market access priority-setting process | While the STAG has a priority-setting process with funding partners, this has not extended to the broader industry. The government is currently developing and testing a market access prioritisation process. Industry needs to monitor and support the implementation of the process. | A robust framework between industry and government to determine agreed strategic market access priorities and ensure resources are directed toward high-impact outcomes with high probabilities of success. |
| Free Trade Agreements with the EU, India, and Gulf Cooperation Council | Trade agreements provide an opportunity to reduce tariffs and other barriers to trade, increasing the competitiveness of seafood exports. Free and open access to a range of markets supports diversification efforts. | Zero tariffs on Australian seafood in FTA partner markets, removal of non-tariff barriers to trade, favourable rules of origin, and measures that support sustainability and fisheries management. |

In addition to the trade and market access priorities, the Seafood Trade and Market Access Agenda and Action Plan (2024-26) outlines the principle by which STAG/SIA will operate and work with partners to resolve the priority market access issues. The document also aligns with the Seafood Industry Australia's Seafood Export Market Strategic Plan (SEMSP), which aims to achieve the goal of \$2 billion in export value by 2030.

The Seafood Trade and Market Access Agenda and Action Plan (2024-26) is now ready to guide SIA as it assumes the trade and market access functions.

China Market Access

Live Rock Lobster

In October 2020, Chinese customs suddenly detained shipments of live Rock Lobster. A Lobster Working Group (LWG) was quickly formed, and an emergency response was developed and activated. Since then, the STAG has provided secretariat support for the LWG and worked closely with SafeFish, SIA and the government to find a pathway to reopen this vital market for Australia's lobster industry.

The political atmosphere of the Australia-China relationship improved during 2023 and 2024, providing a more favourable environment for officials to resolve the market access issue for live rock lobster exports. All commodities affected by trade disputes, except for live rock lobster, have returned to the China market, and despite the more favourable conditions, live Rock Lobster, at the time this report was written¹, remained unable to trade with China.

This is not without considerable effort by the STAG, SIA, members of the LWG and government. STAG activities undertaken in 2023 and 2024 to support the resolution of the live lobster trade dispute with China have included:

- arranging regular DFAT and DAFF briefings for the LWG.
- monitoring the Chinese media (including Chinese language media) to provide market intelligence via the STAG newsletters (see below).
- facilitating government (including ministerial) access to technical and industry data and information to support their negotiations.
- providing briefing material (written and verbal) to government officials and ministers as needed, including the Ministers for Trade, Tourism and Investment and Minister for Agriculture.
- participating in industry delegation visits to Canberra to support discussions with relevant officials, ministers and shadow ministers.
- providing briefing support for Southern Rock Lobster industry representatives' interaction
 with Australia's Ambassador-designate to Beijing and Consul General-designate to Shanghai in
 December 2023.
- coordinating with SafeFish to provide updated information to DAFF to support their reengagement with the General Administration of Customs of the People's Republic of China (GACC) at the working level.
- research, analysis and advice on establishing and maintaining cooperation programs with key organisations in China.
- coordinating industry input to the draft SIA media releases in preparation for a positive announcement regarding the resumption of trade.
- facilitating meetings between the LWG and DAFF that resulted in an agreed approach to
 address China's concerns regarding the technical and testing levels. The details of this work
 cannot be disclosed to the broader industry due to a request for confidentiality from DAFF
 and the existing LWG NDA arrangements.
- updating other rock lobster industry stakeholders by circulating a summary of comments from the government and issuing formal communiques when possible (within the context of confidentiality needed to pursue trade negotiations).
- consulting with industry and government about administrative readiness to resume trade.

In July 2024, as part of the agreed transition arrangements, SIA assumed responsibility for general market access issues while STAG continued to support the LWG in resolving the outstanding China market access issues for rock lobster.

 $^{^{}m 1}$ the China market reopened to Australian live lobster (ERL, SRL and WRL) in December 2024 but remains closed to TRL

When drafting this report, Australian live lobster and Tropical Rock Lobster (TRL) remain unable to be exported to mainland China. However, talks with Chinese authorities have entered a critical stage. A pathway to restored access for live lobster has been agreed between Australia and China, however, import permits have still not been issued. Officials have indicated and reconfirmed in November of their commitment to the agreed timetable for reopening the market.

At the time of writing, DAFF was optimistic about reaching an agreement with China before the end of 2024. This required industry-government collaboration on data provision, co-design of a compliance regime, registration of live export establishments, and broader sector engagement to facilitate smooth reentry. To maintain access over the longer term, more work will be needed to better understand China's tissue sampling protocols to develop a best-practice model and to bring the NRS into better alignment with industry needs to manage risk and meet China's and the requirements of other key markets.

When market access for Australian live lobster to China is restored, exporters will still face several challenges in recovering their previous market. These include expected increased scrutiny of Australian imports by border authorities, at least initially.

In anticipation of the market reopening, STAG has been working with industry and DAFF to manage risks, including the risk of early exceedance/non-compliance and administrative/communication errors leading to the detainment of initial consignments. LWG members and DAFF intend to continue meeting into 2025 to manage risks and share information as trade normalises.

Other challenges include deteriorating economic conditions in China, lower consumer spending, and increased competition in the market. Competition comes not only from traditional suppliers such as New Zealand but also from new market entrants.

For example, in the last twelve months, China has concluded inspection and quarantine agreements governing the import of wild-caught aquatic produce from Kazakhstan, Oman, Myanmar, Russia, Sri Lanka, Brunei, Uruguay, Indonesia, Panama, and Venezuela. Some of these countries have valuable fisheries, including for rock lobster and abalone that will compete as suppliers with Australian exporters. While the scope in terms of species covered by these agreements is not clear, it is evident that Australia's competitors are securing more and better access to China.

Tropical Rock Lobster

In early 2024, the live rock lobster market access issue became more complicated. Even if the concerns around Cadmium are resolved, access may only be granted for three out of the four commercial species of Australian rock lobster. Tropical Rock Lobster may remain shut out.

China has listed Tropical Rock Lobsters (TRL), *Panulirus ornatus* as a prohibited import due to environmental concerns. The ban affects all TRL producers globally, not just Australia. The STAG understands that the relevant Chinese authorities placed *Panulirus ornatus* on a Class II protected species list and banned customs import permits and quotas of this species at every entry port to China. This is despite it being classified as a species "of least concern" on the International Union for Conservation of Nature (IUCN) list.

Based on industry and government advice, the TRL ban is assessed as likely to be more challenging to resolve, requiring sustained industry representations over a longer timeframe. According to the latest DAFF advice, seeking an exemption or having TRL re-listed onto a less restrictive protected species list in China (which would allow for a geographic exemption) are not practical strategies. However, other options may be available, including seeking a change to China's law or pursuing the issue through the World Trade Organisation (WTO). This is acknowledged as highly ambitious.

The STAG supported the establishment of a sub-committee to the LWG to specifically focus on the Tropical Rock Lobster market access issue. Briefs have been developed with messaging focused on the following three core points:

- 1. The fishery is sustainably managed.
- 2. The social and economic impacts on local communities are severe and worsening.

3. The TRL exclusion is part of the broader issue of restoring Australia's live lobster trade with

Managing this issue requires a persistent but diplomatic approach and an ability to understand and navigate the Chinese regulatory system, recruiting allies in the market and third markets as appropriate.

Specific actions to date have included:

- Compilation of industry information into succinct key messages and background briefing documents for distribution to Australian government officials and parliamentarians, including DAFF, DFAT, and QLD Government.
- Support for TRL delegates as part of wider LWG delegations to Canberra in September 2023 and August 2024.
- Reviewing and editing DAFF submission to China's Ministry of Agriculture and Rural Affairs (MARA).
- Facilitating meetings of TRL stakeholders on 12 April, 26 April, 8 August, 20 September, and 27 September.
- Briefed Trade and Investment Queensland (TIQ) China on the ban in Shanghai.
- Raised TRL ban with the China Aquatic Products Processing and Marketing Alliance in Beijing, seeking to better understand the processes of listing endangered species in China.
- Provided advice to Torres Strait Regional Authority regarding engagement with the Chinese Consulate in Queensland on the issue of the TRL ban.

The TRL working group continues to review and update the briefing document for Australian officials, including the creation of agreed messaging that can be delivered in any interactions with Chinese partners and officials during delegation visits as part of the SIA China re-engagement activities.

STAG worked with Trade and Investment Queensland (TIQ) to engage with the China Chamber of Commerce for Foodstuffs and Native Produce (CFNA). TIQ reports CFNA, which has been generally receptive to approaches by Queensland government on market access issues, has influence within the Chinese system and may not be aware of the TRL issue. As part of the transition arrangements SIA will prioritise the recruitment of CFNA as a partner on this matter.

Amendments to the China Approved Species List for import from Australia

To be eligible for export to China, a species must be on the approved species list for the source country. Every country has a specific list that details the approved species for import to China from that country. Countries can request the General Administration of Customs of the People's Republic of China (GACC) to adjust the species on their list.

Several attempts were made to get China to amend the list. While some minor amendments were approved, major ones were not, including some Sea Urchin Sea Cucumber, and Prawn species, among others. China advised that we could only submit three species for approval at a time. In late 2019, the STAG facilitated an industry-wide process to create a prioritised list. Comprehensive risk assessment dossiers were prepared to support the first applications. China has not responded to these requests.

After a multi-year period of minimal contact due to tensions in the bilateral relationship, during which this issue could not be progressed, officials in China and Australia are now re-engaged in technical discussions.

Responding to interest in the China market as an export destination for South East Australia's growing Long-spined Sea Urchin (*Centrostephanus Rodgersii*) populations, STAG prepared an update brief for the Abalone Council of Australia (ACA) board and other stakeholders (see Attachment 6).

In November 2023, DAFF contacted GACC to renew talks on the species list, submitting Australia's previously requested species as the basis with some unspecified but minor amendments, including

the additions of urchin roe and several prawn species. More than twenty species were identified in the request.

GACC responded by providing application forms for the wild-caught and aquaculture sectors. DAFF officials are preparing these applications. DAFF continues to work on this.

CIFER A New Establishment Registration System

In partnership with SIA, the STAG supported government efforts to assist the industry in transitioning to the newly established China Imported Food Enterprise Registration (CIFER) system. STAG was key in disseminating information about the CIFER process from official and unofficial sources. The STAG secretariat also fielded telephone and email requests from industry.

STAG understands that most export establishments have successfully registered on the system. Feedback from individual exporters suggests the CIFER system is a meaningful improvement in clarity and ease of use compared to its predecessor.

However, challenges remain. DAFF reports that some seafood commodities (e.g., some finfish species) have had difficulty matching their registered products against China's unique customs codes, leading to export delays. While the particular issue has been resolved, the potential for future disruptions remains.

Exporters of live products will be required to register under a new, non-CIFER framework. Whereas CIFER is for imported food products, we understand live exporting establishments will be registered by DAFF and the details provided to GACC. This process is already underway within DAFF.

China Market Engagement Plan

STAG worked with SIA to develop a China Engagement Plan to form a more substantial and strategic relationship that supports existing access and underpins future export growth that is more resilient to future shocks (Attachment 7). The plan includes industry delegation visits to China, engagement with Chinese diplomatic officials in Australia, technical exchanges and workshops, and better integration with the China-focused Australian business community.

As part of the SIA transition arrangements, the STAG project was varied in July 2024 to support implementing the China Engagement Plan.

Under this variation, STAG provided critical support to SIA in executing this first phase of its China Engagement Plan, identifying key in-market stakeholder groups, arranging meetings, planning logistics, providing translation services, and offering policy and cultural advice. This work aimed to address a current gap in peer-to-peer relationships with Chinese counterparts, which are seen as vital for supporting market intelligence, early warning systems for regulatory changes, capacity building, and in-market advocacy efforts.

Andrew Robertson (STAG's Trade Policy Analyst) joined the first SIA-led delegation to China in August 2024. The primary objective of the visit was to establish in-person connections with leaders of key Chinese industry organisations, better understand the landscape of associations in China and set up the next steps towards long-term cooperative relations. The visit was strategically timed to coincide with the World Seafood Shanghai expo, allowing the delegation to engage with a broader cross-section of the Chinese seafood industry and support attending Australian exporters.

During the August 2024 visit, arrangements were put in place to build relations with the China Aquatic Products Processing and Marketing Alliance (CAPPMA), the China Chamber of Commerce for Foodstuffs and Native Produce (CFNA), the Agricultural Trade Promotion Centre (ATPC), the Customs Inspection and Quarantine Association (CIQA), the China Cuisine Association (CCA), and the Shanghai Seafood Trade Association (SFTA). These relationships can provide ongoing benefits, including market intelligence and insights, regulatory and compliance support, crisis management, technical capacity building, and network building, supporting predictable China market access and trade.

Since the August 2024 visit, formal MoU-level cooperation agreements with key in-market partners were pursued based on the following elements, (tailored as appropriate):

Information Exchange

The Parties will facilitate the exchange of information and contacts, including relevant laws, regulations and understandings of best practice and international standards, related to the following: sustainable fishing practices; aquaculture development; food safety; disease prevention and management; quality assurance; traceability systems; market access procedures; quarantine and inspection.

The parties will also exchange information related to consumer demand, preferences, and market trends; supply factors including production, prices, and trade levels; and the development and promotion of seafood consumption.

Technical Training

The Parties shall offer and provide technical and skills training on seafood-related national laws, regulations, processes, and standards to members from both sides, other entities, and/or relevant government officials.

Joint Meetings

The Parties shall establish a regular dialogue to strengthen association-level relationships, facilitate information exchange, and explore issues of mutual concern including monitoring the progress of Australian seafood gaining market access to China.

Mutual Support

The Parties will advocate in support of each other's objectives in relation to market access for Australian seafood and smooth facilitation of Chinese investment in Australia's seafood industry. The Parties will consider participating in and supporting each other's events, including conferences and expos.

Exchange Visits

The Parties will consult and collaborate to organise visits between member companies and seafood production and processing enterprises of both Parties for the purpose of building relationships and mutual understanding. Visits may include:

- joint participation in seafood promotions
- tastings in both China and Australia
- chef training and lectures
- new product presentations
- seminars and exhibition activities
- hosting exchange visits of seafood industry regulating authorities
- study tours involving seafood production and processing enterprises.

A second China visit was undertaken in November 2024, during which Andrew Robertson from the STAG arranged and facilitated a program of meetings and activities for SIA-led industry delegation (Attachment 10.16), ensuring Australian seafood made a high-impact impression as part of attending the China International Import Expo, securing meetings with key dignitaries, including opportunities to raise market access priorities.

Framework agreements (MOUs) have now been successfully negotiated with CAPPMA and CIQA, (Attachments 10.17 and 10.18, respectively) while talks continue with CFNA and SFTA. The intention is to finalise these agreements and hold signing ceremonies in 2025.

These relationships have been framed at the strategic whole-of-seafood industry level. However, there is scope for direct engagement with the rock lobster and abalone industries specifically - for example, China delegations included representatives from the Southern Rock Lobster and Western Rock Lobster industry.

During the November 2024 China visit, the STAG provided on-the-ground logistical support, cultural and communication advice, trade and market analysis, and other assistance to industry delegates from the rock lobster industry including:

- facilitating access to China Fisheries and Seafood Expo in Qingdao and CIIE in Shanghai.
- wholesale and retail visits, enabling these delegates to observe firsthand the commercial
 factors that may impact a resumption of lobster trade with China, including the prevalence of
 low-priced Mexican rock lobster and an abundance of cheap Russian king crab, a competitor in
 the premium seafood category.

Australian Government Export Rules and Systems

National Residue Survey (NRS)

The market access dispute with China for Rock Lobsters highlighted some deficiencies in the NRS data, which were insufficient to respond to China's request for information.

The STAG has been offering to work with DAFF and the NRS to review the current NRS and, if necessary, design a more 'fit-for-purpose' scheme for the wild-capture seafood sector since 2021. In April 2024 a working group was established with membership from DAFF, SafeFish, STAG and SIA.

Key issues are:

- The NRS data was insufficient to respond to the lobster China market access issue, and it is good practice to review systems following such disruptions.
- The cost of the NRS is paid via export fees and covers both aquaculture and wild-caught products.
 Businesses that provide samples are not reimbursed for any costs. While businesses that provide
 samples can access their results, many businesses approached for samples do not do so because of
 perceived inequity of cost impost (one company having to foot the bill for sampling for the whole
 sector/industry).
- Past difficulties in obtaining samples were acknowledged. Industry attitudes towards the NRS
 system are changing, and communications to underline its importance are needed to secure buy-in.
 This would make it easier to get samples. DAFF agreed to provide information for communications
 and outreach efforts.
- The budget has not changed for many years, which stretches resources and limits the program's
 effectiveness as a data source to respond to market access issues. However, export cost recovery
 planning for 2025-26 would soon be underway and presented an opportunity to re-examine the
 budget.
- The wild-caught program only includes testing for heavy metals, while the aquaculture program includes a suite of other chemical contaminants and samples are collected from aquaculture sectors that do not export (and therefore do not contribute to the cost of running the NRS).
- DAFF uses the NRS data to demonstrate compliance with international market access requirements, typically aligned to EU requirements.
- NRS data must be more widely available to stakeholders such as SafeFish to assist with their work while meeting legislated privacy obligations.
- At the SafeFish contaminants workshop in 2023, industry and government stakeholders agreed that
 reviewing the NRS system was their number one priority and that a business case should be
 progressed.
- DAFF's major constraints, including legislative obligations and the need to fully cost recover, need to be considered. It was acknowledged that additional funding could be provided, but it is unclear how that could happen under the current arrangements.

DAFF has proposed the next steps, and Safefish has developed an outline for an Opportunity Cost review that could help inform the business case for a better, more resourced and fit-for-purpose NRS. SafeFish will continue to lead this activity with support from the STAG and SIA as needed.

DAFF Market Access Priority Setting Process

The Seafood Market Access Working Group (SMAWG) comprised of DAFF, SIA, STAG, and SafeFish, provides the strategic forum for consultation between industry and the department in relation to market access priorities for the export of fish and fish products. This group last met on 18 April 2024 and agreed to finalise the priority-setting Business Rules, which determine the framework for decision-making (Attachment 8).

Market access requests are assessed against a scoring matrix that measures the probability of success and the resources needed from government and industry to assign a weighting that helps determine priority. Other factors can be considered, and the SMAWG as a group makes the final recommendation on prioritisation.

An industry-government portal has been created to facilitate requests and monitor progress on Australian seafood technical market access issues. As part of implementing the priority-setting framework, the next step will be to align the government priority database with industry expectations, starting with the objectives and priorities of the Seafood Trade Agenda.

The next step is to align the current priorities outlined in the Seafood Trade and Market Access Action Plan (STMAAP)with the Department's system.

Trade and Market Intelligence Services

The STAG provides a market intelligence service to support Australian seafood exporters. It uses information from various sources, including foreign media, to create a broad picture of existing market trends, consumer insights, current and potential competition issues, and growth potential for new products and services.

During 2023 and 2024 STAG identified and maintained a watching brief on several specific trade and market access issues; notable issues during the reporting period include:

- Conclusion and implementation of Free Trade Agreements with India and the UK. STAG provided detailed assessments of the agreements' contents and potential benefits and other impacts for exporters.
- DAFF implementation of the NEXDOC transition, providing regular updates and information on how to register in the new system, which was implemented as of 1 October 2024.
- China draft packaging requirements. STAG provided early advice on draft food packaging regulations lodged with the WTO and prepared a courtesy translation for exporters (now hosted on the STAG website).
- Indonesia Halal Law. STAG assessed the potential impacts and referred the issue for industry-coordinated response to SIA.
- USA FDA's final rule on Requirements for Additional Traceability Records for Certain Foods (Food
 Traceability Final Rule) establishes traceability recordkeeping requirements beyond those in existing
 regulations for persons who manufacture, process, pack, or hold foods included on the Food
 Traceability List (FTL), including foreign companies supplying the US market.
- USA Seafood Import Monitoring Program (SIMP) changes. STAG continued to monitor changes to the species list covered by the SIMP. The program is under review.
- IUU fishing focus. As the government considers measures to combat imports of illegal, unregulated, and unreported fisheries products, STAG has curated material on different approaches to the problem to facilitate stakeholder discussion.
- China's ban on Japanese seafood. While not directly impacting Australian seafood exporters, this issue affects global seafood supply and demand flows.

STAG Communications Review

The STAG communicates market intelligence information to stakeholders weekly, alternating between two publications, STAG Seafood Trade Matters and STAG News Bites. The target audience for these newsletters are Australian seafood exporters and Australian Government departments.

Both newsletters are sent via electronic direct mail, with subscribers opting to subscribe to a mailing list.

Key statistics (January 2023 to December 2024)

- 370 to 420 subscribers (estimated)
- 123 newsletters have been sent
- 40,543 emails with a 99.1% delivery rate, 0.1% unsubscribe rate and 0.9% bounce rate
- The average open rate was 47.8% (about 19,358 emails opened)
- The click rate was 12.7% (about 5148 clicks)
- The click-to-open rate (CTOR) was 26.5% and ranged from 6% to 72.4%, which coincided with the PM's visit to China.

Subscriber Survey

To inform how the STAG market intelligence and communications functions should be transitioned to SIA, a STAG newsletter subscriber survey was conducted in early 2024. The aim was to assess the level of satisfaction with the service and identify any unmet information needs. The results are summarised below, with full results in Attachment 9 respectively.

The survey revealed high satisfaction, with many respondents giving very positive assessments of STAG work. Top level findings include:

- The STAG newsletters are hitting the mark in terms of the target audience, with more than 30 per cent identifying as exporters, 15 per cent as government, and a spread of fishers, industry associations, and quota owners/investors (about 8.8 per cent each).
- The proportion of industry (i.e., exporters, fishers, industry associations, and quota owners) and non-industry respondents (i.e., government, consultants, private citizens, and those who answered 'other') was approximately 58 per cent and 42 per cent, respectively.
- Global regulatory and market access issues, especially concerning China, remained the top relevant topics. Consumer and production trends, as well as trade negotiations, were also popular.
- Subscribers were less interested in webinars, opportunities to provide input on government policy/regulation, and the alternative protein sector.
- Respondents were keen to see more species coverage besides rock lobster and abalone.
- The top markets of interest were China, Japan, Hong Kong, Vietnam, and the USA, in that order.

Figure 2: Breakdown of respondents to the STAG newsletter survey (April 2024)

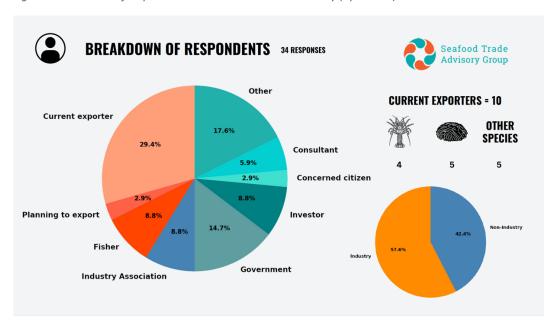
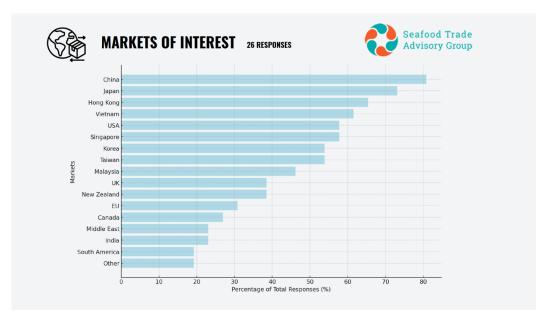


Figure 3: Markets of Interest (STAG Subscriber Survey April 2024)



Respondents were asked about their views on the opportunities and challenges for seafood exporters. The responses are summarised in figures 4 and 5 below.

Figure 4: Opportunities and Challenges Current Export Views (STAG Subscriber Survey April 2024)



OPPORTUNITIES AND CHALLENGES: CURRENT EXPORTER VIEWS



OPPORTUNITIES:

- China and other regional markets
- Non-China markets
- India
- Vietnam
- Asian region
- Hong Kong emigre communities
- I can't see any opportunities



CHALLENGES:

- Reliable importing country requirements
- Lack of environmental credentials
- Poor marketing as a country around seafood story
- DAFF & Australian Government
- Cargo space, Australian Trusted Trader delay
- AVG
- We only have one country (China) that will pay the price for our product. It is impossible to diversify to other countries because they will not pay the price for the product.

Figure 5: Opportunities and Challenges Other Views (STAG Subscriber Survey April 2024)



OPPORTUNITIES AND CHALLENGES: 'OTHER' VIEWS



OPPORTUNITIES:

- Diversification
- China
- Sustainabilty credentials
- Vietnam
- SE Asia
- Japan
- Premium markets in EU and UK
- Hopefully China removing tarrifs
- Australian aquacultured seafood
- Difficult to say
- Toss up between Asian communities in Canada and North America and emerging high-end market in India.

CHALLENGES:

- Diversification
- China
- Sustainability credentials
- Securing market access
- Destination market regulation changes
- High costs of business
- Lack of a collaborative approach to marketing
- Maintaining premium reputation
- International competition
- Depletion of 'wild' marine resources
- Domestic regulation
- Politics

Figures 6 and 7 below show the level of interest in the different topics covered by the STAG NewsBites and Seafood Trade Matters.

Subscribers were also asked to suggest additional topics for future newsletters. Subscribers were interested in information about how other commodities market themselves, trade delegations, Japan, the transition to SIA and more about the SIA market development information to broaden the audience for that information, consumer trends by age and demographics, more coverage on species other than rock lobster and abalone, production issues, and more information on seafood trade events (domestic and international).

Figure 6: Interest in STAG News Bites topics (STAG Subscriber Survey April 2024)

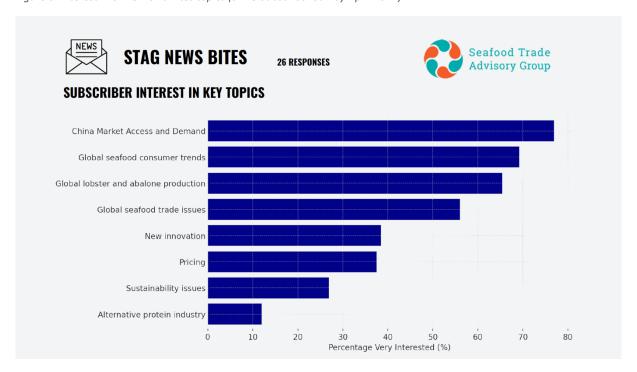
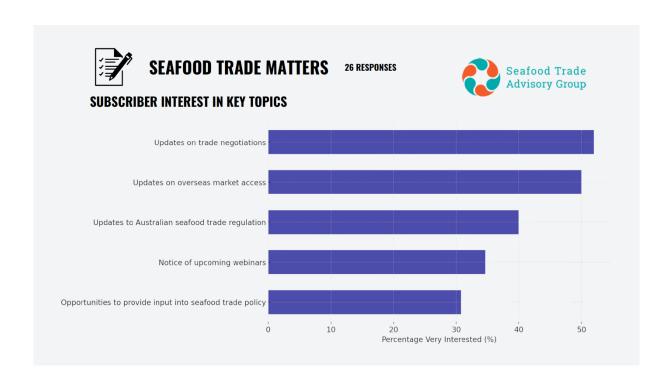


Figure 7: Interest in Seafood Trade Matters Topics (STAG Subscriber Survey April 2024)



Industry, Research and Government Engagement

Seafood Export Consultative Committee (SECC)

The STAG is a DAFF Seafood Export Consultative Committee (SECC) member, helping to ensure a close collaborative effort to resolve technical market access issues. Reports from the SECC meeting are circulated (subject to Departmental approval) to exporters through the STAG Seafood Trade Matters newsletter.

During the project, the STAG participated in three SECC meetings (11 May 2023, 21 November 2023, 23 May 2024) and provided updates to participants. Topics raised and discussed included:

- concerns around access to health certifications,
- the NRS for wild-caught fisheries,
- market access priority-setting frameworks.

SafeFish

The STAG and SafeFish worked closely on technical market access issues as follows:

- Provided input regarding CODEX Committee deliberations
- Participated in the SafeFish partnership meetings, providing STAG updates to participants
- Participated in the SafeFish Chemical Contaminants working group
- Collaborated on formal discussions regarding an NRS review

Federal Government Liaison

Regular meetings with government officials included:

- DAFF Dairy, Fish, and Eggs team to discuss STAG priorities and provide background on the lobster access issue.
- DFAT China Economic Branch Head to discuss Australia-China relations, the live lobster access issue, and the Tropical Rock Lobster issue.
- DAFF's Seafood Export Facilitator to discuss updates to the China Approved Species List.
- Seafood Market Access Priority-Setting working group meetings.
- NRS meetings.

International Seafood Trade Networks

- Attended the World Seafood Congress in Portugal in September 2023 to discuss China's market
 access issues with the Irish and US governments and other emerging trade and market access
 issues with governments, industry, and researchers.
- As the incoming President of International Association of Fish Inspectors, Jayne Gallagher visited China to discuss, among other things, seafood trade technical issues, paving the way for later discussions between SIA and CIQA (note that this project did not fund this visit).

Conclusion

The STAG secretariat worked with the STAG Partnership Group to ensure a smooth transition of trade and market access research, development and extension services from the STAG to SIA. Some STAG functions have already been transitioned, and the rest are ready to be transferred when the SIA Trade Unit funding is approved and the people are in place to take over.

While the transition was not completed by June 2024 as planned, the 2024-2026 Seafood Trade Agenda and Action Plan were completed, and the STAG newsletters (STAG NewsBites and Seafood Trade Matters) were produced, distributed and read by a wide cross-section of stakeholders.

The review of STAG communications, the Market Access Priority Setting Framework and the China market engagement work completed and detailed in this report provide a solid foundation for the operations of the new SIA Trade Unit helping to ensure no disruption to existing trade and market access activities.

Implications

The STAG has actively worked with SIA, the SECC and partnership members to provide timely and factually accurate information to the industry on trade and market access issues, including opportunities for market diversification.

Maintaining existing market access while removing barriers in new markets will underpin the future growth of Australia's seafood exports. In the past five years, there have been many disruptions to trade, small and large.

As the international seafood trade environment becomes more complex (at a technical and political level), disruption events and system changes will become more common. Industry, government, and research organisations will need to invest continuously in people, systems, and processes to support the expansion of international trade envisaged in the Australian Seafood Export Market Strategic Plan (SEMSP).

Recommendations

Transitioning the functions and services provided by the STAG to SIA will be completed once the new SIA Trade Unit has received funding from the FRDC and industry partners.

To support the ongoing trade and market access development needs of the Australian Seafood industry, it is recommended that SIA:

- 5. A well-credentialed, qualified trade analyst should continue to be engaged to undertake the trade and market access negotiation components of the Seafood Trade Agenda and Action Plan 2024-2026. This will ensure no disruption in activities at a critical stage in resuming and growing trade with China and the continuation of support for market diversification efforts to reduce reliance on China.
- 6. Use the work done through this project and the outputs it has developed to continue building support for international trade and market development activities, as per the SEMSP.
- 7. Continue to work with the STAG foundation partners (ACA, SRL, and WRL) to deliver on their priorities while seeking new investment from other industry sectors.
- 8. Ensure that specific seafood trade and market access development skills are built in government, research and industry to support the desired export growth, as detailed in the SEMSP.

Further development

While preparing this report, some trade and market access challenges remain unresolved. Some, such as the access to China for live lobster and tropical rock lobster and the China-approved species for Import from Australia, will require long-term and sustained effort. Therefore, building industry, government, and research capabilities should remain a key objective of the SIA Trade Unit moving forward.

Future extension and communication activities could include online webinars/podcasts and facilitating industry forums to provide opportunities to collaborate and learn from each other. These activities should be based on the industry needs and the international market activities that are happening at the time. Due to the commercially and politically sensitive nature of trade, it is suggested that social media is inappropriate for communications.

Extension and Adoption

This project has a significant component of extension and communication activities and has actively provided timely and factually accurate information to the industry on trade and market access issues. These activities include:

STAG Newsletters

The STAG communicates market intelligence information to stakeholders weekly, alternating between two publications:

STAG Seafood Trade Matters

- **Content:** Designed to inform exporters of extremely important issues that may impact trade and export, e.g. market disruptions, and changes to legislation, policies or procedures (positive or negative). Includes critical information that may immediately impact business.
- Target audience: Australian seafood exporters and Australian Government departments.

STAG News Bites

- Content: Information to inform Australian seafood exporters of trade and export news, market changes, and market intelligence (market trends, consumer insights, competitor activities, market opportunities etc). Content sources include translated material from international media or websites.
- Target audience: Australian seafood exporters and Australian Government departments.

Both newsletters are sent via electronic direct mail, with subscribers opting to subscribe to a mailing list. Key statistics relating to engagement with the newsletter is reported on earlier in the report.

STAG Website

The STAG website provides the backbone for all STAG communications. All communications are stored there, together with the STAG alerts and exporter resources. Honey & Fox reviewed and updated the existing STAG website in 2019 to make exporter resources and materials more easily visible and accessible. The STAG website has continued to be reviewed and updated throughout the project. The STAG website has been retired and replaced by the SIA "one-stop-shop" website, www.exportingseafood.com.au

Media Releases and Briefings

The STAG provided information and content to SIA so that media releases and briefings could be prepared as needed.

Project materials developed

| Appendix Number | Details |
|-----------------|---|
| 1 | SIA/STAG Issues Paper |
| 2 | Potential Business Models for STAG Trade Unit |
| 3 | Agreed Transition Timetable (January 2024) |
| 4 | Draft Investment Proposal for the Establishment of a New SIA Trade Unit |
| 5 | Final Draft Seafood Trade Agenda and Action Plan (2024-2026) ready for publication by SIA |
| 6 | Brief on adding Long-spined Sea Urchin to the List of Approved Species for Export to China from Australia |
| 7 | China Engagement Plan |
| 8 | DAFF Market Access Priority Setting Process Business Rules |
| 9 | STAG Communications Survey (Full Results) |
| 10 | Project Variation Report (December 2024) |

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 1: |
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| SIA/STAG ISSUES PAPER |
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SIA/STAG Transition Arrangements

Issues Paper

Purpose

This document summarises discussions between SIA (CEO Veronica Papacosta, Trade Manager Julie Willis, and Communications Director Jessica McInerney) and STAG representatives (Jayne Gallagher, and Andrew Robertson).

It identifies key issues for consideration in developing the SIA/STAG Transition Plan. This is the first step in developing an agreed pathway and a formal Transition Plan for the STAG. These issues are for consideration by the current STAG funding partners (ACA, SRL, WRL and FRDC).

Proposal

Subject to the agreement of the current funding partners, the functions of the STAG are proposed to be incorporated into the overall SIA service offering at the conclusion of the current project (June 2024).

The STAG as an entity will be phased out, and some (or all) of the current activities will be continued under the auspices of an 'SIA Export Group'.

Proposed SIA governance/structure

The SIA propose that the Export Group, which may or may not retain the name "STAG", will:

- be a formal part of SIA's organisational structure.
- be subject to decisions of the SIA board.
- have a permanent secretariat provided by the SIA using SIA's own funds.
- will not have a separate Chair/Deputy Chair but will act in an advisory capacity to the SIA Chair and Board, who will make decisions based on the advice from the group.
- operate according to an agreed Terms of Reference.
- provide oversight on the delivery of 'core/essential' exporter services, which must be defined.
- identify special projects outside of 'core/essential' services the special projects will have separate funding, such as the STAG current funding partners, as well as potentially other sources, eg ATMAC;
- include current STAG partners as well as representatives of other seafood export industry stakeholders, all stakeholders will have equal focus.



Proposed SIA seafood export services

The activities undertaken by SIA's Export Group would be separated into 'core' / 'essential' services (funded using SIA's own funds), and other 'special issues' activities (funded through other means e.g. FRDC IPA).

SIA have suggested, for example, that the core/essential activities could include:

- Government engagement (e.g. representing the industry at SECC and other government fora, developing market access prioritisation frameworks, cross-ag sector engagement, NRS/Safefish engagement, Codex, policy development)
- **Industry communications** (e.g. Seafood Trade Matters, social media engagement)
- **Exporter advisory and support services** (e.g. One-stop-shop Export Hub website, online exporter directory)
- **Initial Emergency Response Coordination** i.e. immediate industry response to market closures, and media management

Special issues/emergency response activities, such as those currently undertaken by the STAG, would be funded by FRDC IPAs as appropriate, and include:

- **Trade disruption recovery** (e.g. establishing task forces to respond to market closures or other commodity-specific market access challenges)
- Market intelligence (e.g. STAG News Bites)
- **Market access** (e.g. studies, policy development, or advocacy around specific market access objectives, such as wild abalone access to Canada)

Issues for consideration

The SIA/STAG meeting identified several issues that need to be considered by the current STAG partnership group (current investors) as we progress with the STAG transition arrangements. These include:

- 1. Currently, STAG has its own Chair and Deputy Chair with access to relevant government departments. This has historically been an unpaid position, although provision has been made in the current STAG budget to pay a small stipend for a Chair position to recognise the time spent managing issues that may be outside their current business priorities. What are the views of the current STAG partners about the proposed SIA export group governance and decision-making arrangements?
- 2. Under the current STAG arrangements, priority issues are decided by the partnership group and articulated in the Seafood Trade and Market Access Agenda and Action Plan issued every three years. A new one is to be developed as part of the transition. The STAG has previously. The current project includes a provision for a priority-setting meeting with the current STAG partners at a time to be agreed. What are the views of the current STAG partners about the proposed expansion of the group to include



other partners, and how will the different (potentially competing) priorities be dealt with?

- 3. The SIA proposes a delineation between core/essential services and special project-based services. The core/essential services will be provided from SIA's own funds (membership fees & operating profits), with special project-related services to be provided using funding from other sources (eg FRDC IPA funds, government programs etc) What do the current STAG partners consider to be core/essential exporter services and what would be special project-related services, please give examples?
- 4. SIA is proposing oversight of exporter services via an expert group. The current arrangement for the STAG is that the partnership group (the organisations who fund the STAG) determine the priorities and activities. Partners also nominate exporters to join working groups and advise on specific issues, eg the Lobster Working Group. What do the current partners think about this STAG process, and how can it be improved? From your perspective, how could the proposed SIA Exporter Group work? What should be the functions (TORs) of such a group, and how would members be selected (criteria for membership)? What would be the criteria for forming a working group and how would members be selected (criteria for membership)?
- 5. The STAG has traditionally been focused on trade and market access issues, working closely with SafeFish on technical issues, not on marketing and promotion such as building and promoting an Australian Seafood brand. These issues have been traditionally seen as quite separate. Marketing and promotion are well within the remit of SIA through their Great Australian Seafood brand and their international trade show activities. What are the current partner's views on this functional separation? Should trade policy and technical market access remain separate from marketing and promotion? How would this work in practice from a funding and activities (core or special project) point of view?
- 6. There may also be funding and stakeholder support issues that need be considered. Would your organisation support, by funding and other means, a trade and market access group as part of SIA? If so, what form would that support take? How much funding support would you consider to be reasonable? What conditions, if any, would you expect to put on providing such support?
- 7. Funding is likely to be an issue going forward. Currently, the STAG is funded through FRDC IPAs, with the three major funders contributing an equal share. In the past, other members have joined, sometimes temporarily at a reduced rate or at no cost (as agreed by the partnership group). The SIA has a larger remit than the current STAG. There may also be a dilution of focus towards a broader seafood approach rather than a



focused Abalone and Rock Lobster approach. Do the current STAG partners have a view on how a larger group would be funded and what the basis of that funding might be? What advantages/disadvantages are associated with a broader seafood approach to resolving trade and market access issues? How might potential conflicts be managed?

8. There may be other issues and/or suggestions that current STAG partners (investors would like to raise. Are there any other issues and/or suggestions related to the proposed SIA STAG transition plan arrangements that need to be considered from a STAG partnership point of view?

Next Steps

Andrew Robertson, STAG Policy Officer and Jayne Gallagher, GM STAG Secretariat, will contact each STAG funding partner to discuss the issues identified in this paper and provide input to developing the draft Transition Plan.

Following these consultations, a draft SIA/STAG Transition Plan will be developed. It is then proposed to hold a STAG partnership meeting in May 2023 to discuss the draft plan and agree on STAG priorities for 2023/2024.

More information/questions

Andrew Robertson 0449 859 838 or andrew@robertsontrading.com.au

Jayne Gallagher 0438 336 712 jayne@honeyandfox.com.au

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 2: |
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| Potential Business Models for STAG Trade Unit |
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New Business Model Options - draft for discussion (May 2023)



CONTENTS

01

SUMMARY OF PARTNER CONSULTATIONS

02

POTENTIAL TRANSITION MODELS

03

STAKEHOLDER MAP

04

NEXT STEPS





Essential vs non-essential services

Crisis response is essential

Expansion of the group to include other partners

Scope would be diluted by bringing on broader SIA membership. But WRL would support Exporter Group pursuing industry objectives including policy submissions and market or strategic research





Separation of market access and market development work

Not supportive of SIA commodity-specific marketing, but supportive of recent ATMAC and Great Australian Seafood activities

Funding and resourcing

Support funding SIA for total sector objectives, but paying on an ad-hoc basis to manage crises when issues arise



CONTINUATION OF SERVICE



Funding and resourcing

Supports delivery of the current STAG services within the same budget parameters, but with SIA as the new service provider

Governance and decision-making arrangements

No specific concerns around what SIA proposes



FOCUS, FLEXIBILITY, VALUE



Expansion of the group to include other partners

Concerns about loss of focus in a wider group with a wider remit

Governance and decision-making arrangements

New model must retain flexibility and avoid bureaucracy



FOCUS, FLEXIBILITY, VALUE



Funding and resourcing

Supports 'fee for service' approach. New model must be value for money - it cannot have the same cost and deliver less.

Essential versus non-essential services

Let the funding partners decide: "We pay, we set the agenda, the model is focused and successful."



GENUINE INDUSTRY VOICE



Governance and decision-making arrangements

The new model needs to be driven by industry and speak with an authentic industry voice

Essential versus non-essential services

Government relations and crisis management are essential services

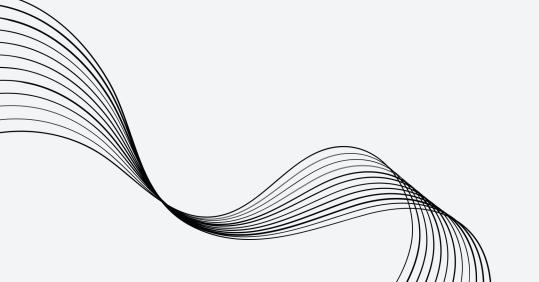


GENUINE INDUSTRY VOICE



Funding and resourcing

There are resource challenges in maintaining a permanent structure for critical exporter services without ongoing FRDC support





FOCUS ON RESEARCH



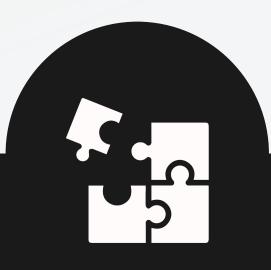
Funding and resourcing

FRDC is not a permanent funding source for the Exporter Group/STAG. FRDC will maintain R&D work while the peak bodies should fund other things

Expansion of the group to include other partners

Need to keep the seafood industry unified and to share activities across commodities on common issues

POTENTIAL MODELS



IPA scope reduced
Core services funded by SIA
Exporter Consultative Forum
SIA Trade sub-committees

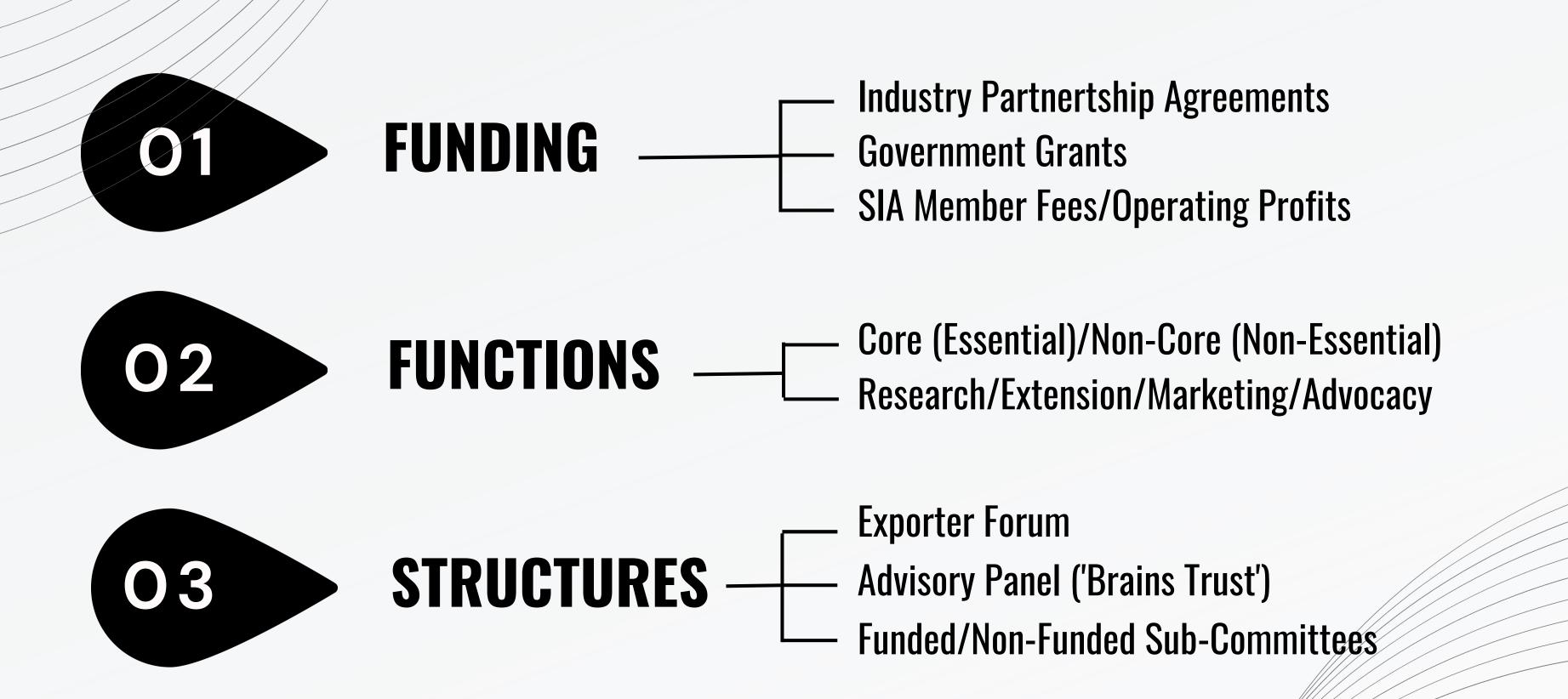
Option A



IPAs expanded
Core services funded by IPAs
SIA Trade 'Brains Trust'
Exporter Consultative Forum
SIA Trade sub-committees

Option B

KEY ELEMENTS





SIA-employed part time Trade
Manager provides secretariat
function, delivers services and
manages projects, including
funded sub-committee
activities

Essential services SIA-funded

IPA funding adjusted to reflect reduced service scope

Other IPAs to fund discrete activities as needed

Total funding (ex-grant monies) around \$180k, including Trade Manager

SIA establishes Exporter
Forum to manage industrywide consultation open to all
commodity groups and SIA
members

Current STAG Partnership Group becomes a funded SIA Trade sub-committee.



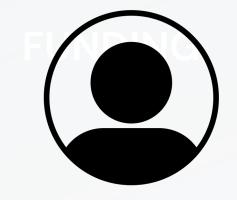
IPA FUNDS

RD&E Projects
Issue-specific Liaison
Sector Consultation
Commodity/Issue Comms

OTHER FUNDS

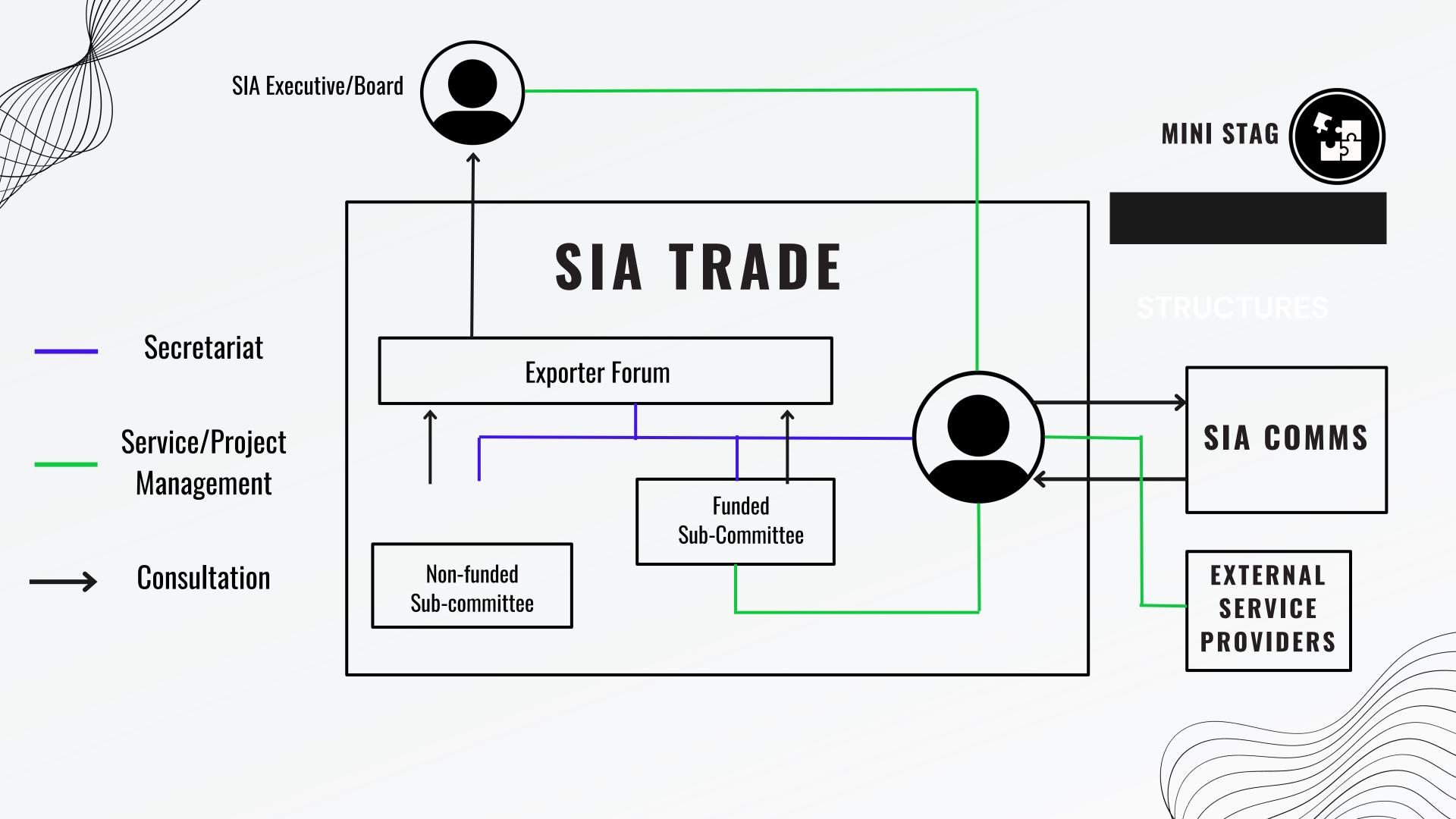
Trade Shows
Great Australian Seafood
Market Reports
Extention and Outreach





PART-TIME EXPORT MANAGER

Executes Functions
Manages Projects
Reports to SIA CEO





Option B KEY FEATURES

SIA-employed full-time Trade Manager provides secretariat function, delivers services and manages projects IPAs established with other commodity groups, combined funding to cover current STAG services (and maybe more)

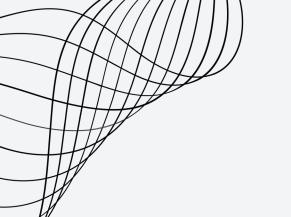
SIA and Government grant funds for marketing activities, policy research

Total funding (ex-grant monies) around \$380k, including Trade Manager

IPA funding partners form a 'Brains Trust' acting as a core consultative committee and advisory panel on all SIA Trade activities

SIA Export Forum established for inclusive consultation

Sub-committees as needed



IPA FUNDS

STAG Core Functions -

Crisis Response

Regulator Relations

Committee Secretariat

RD&E Projects

Industry Consultation

Stakeholder Liaison

Industry Comms

Market Intelligence

Issue-specific Liaison

Commodity/Issue Comms

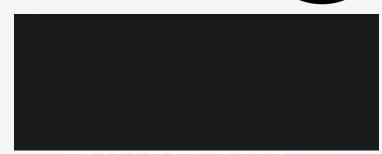
SIA FUNDS

High-level Advocacy
Industry Consultation
Policy Coordination

OTHER FUNDS

Trade Shows
Great Australian Seafood
Market Reports
Extention and Outreach



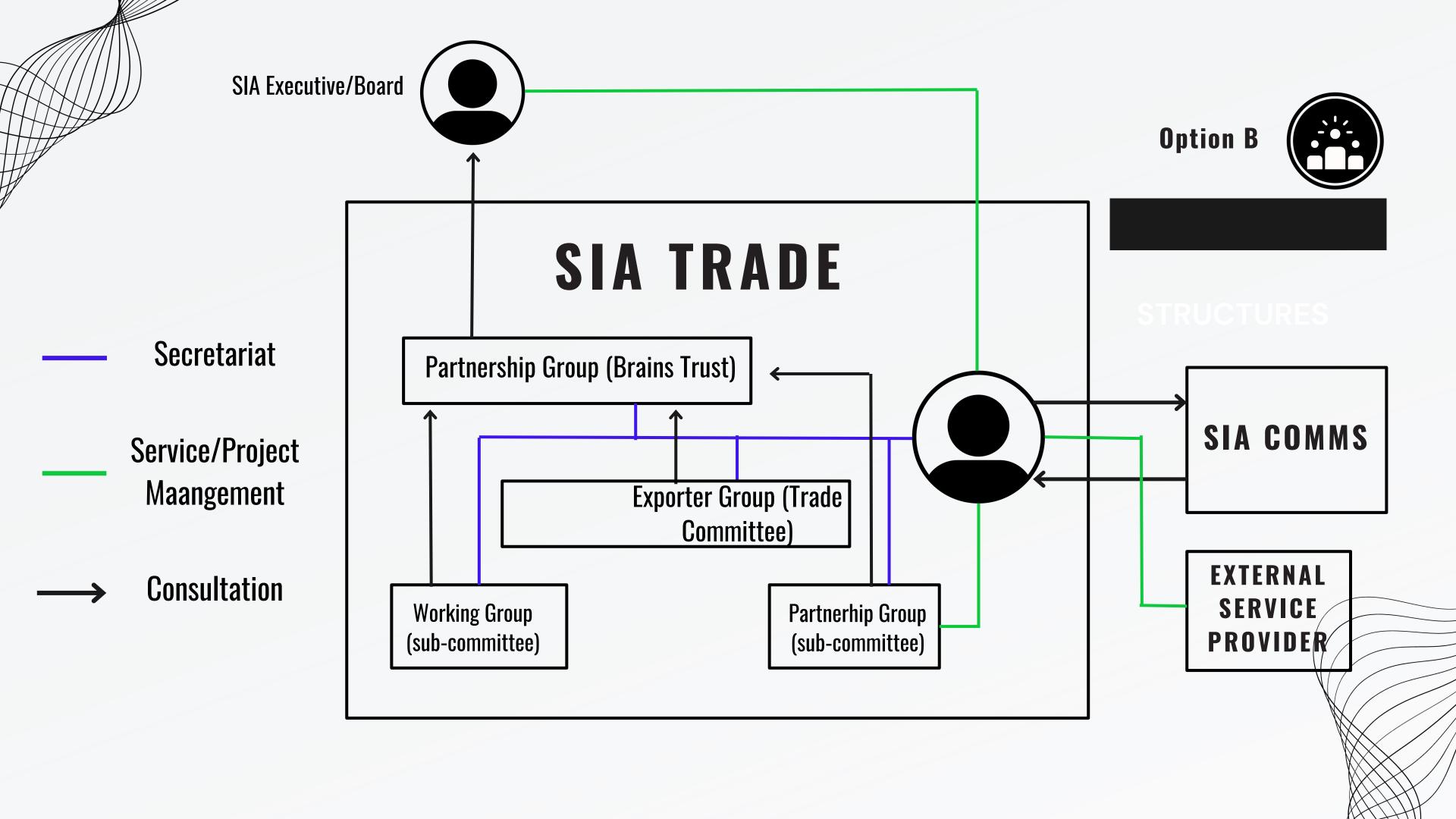


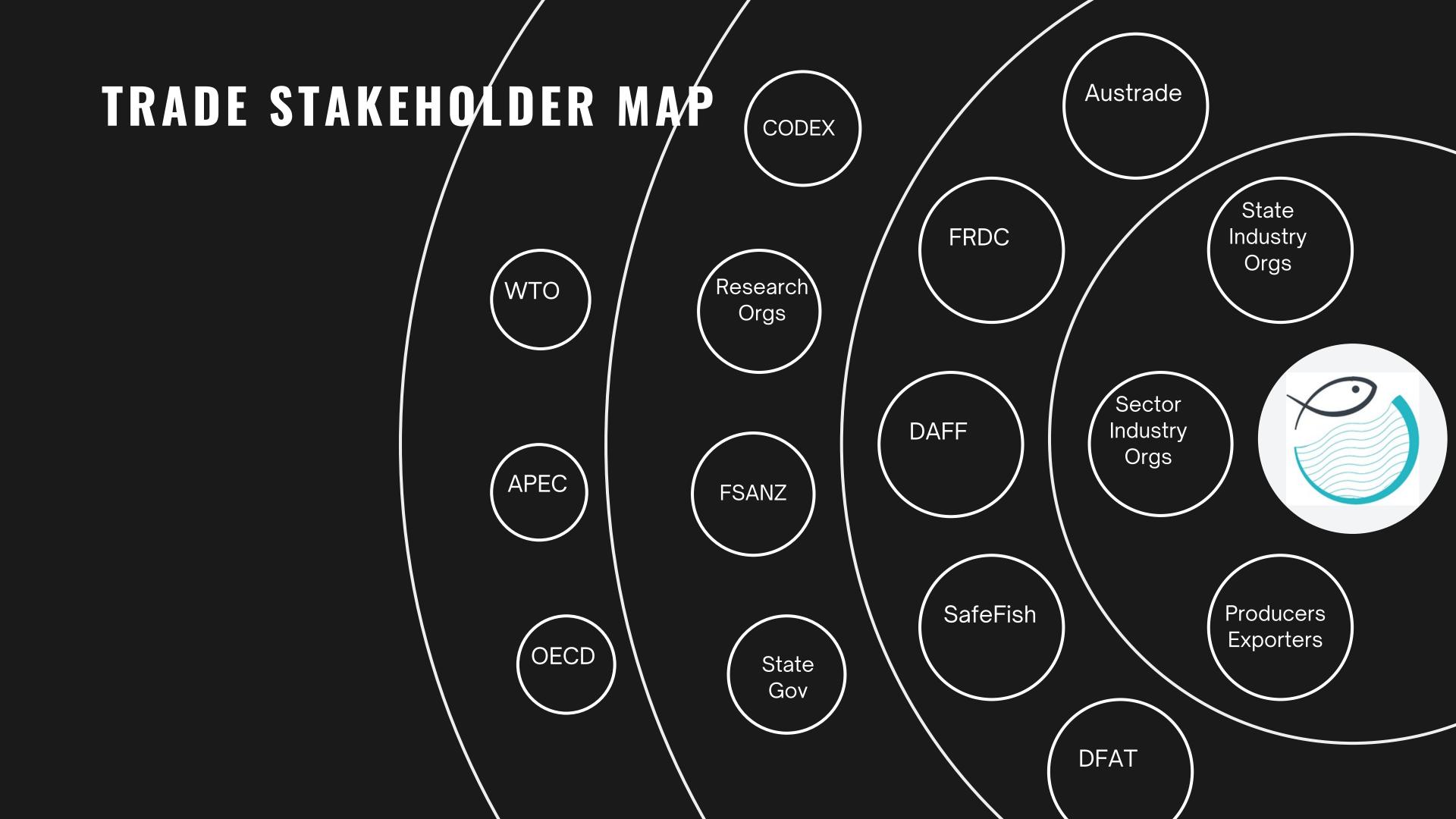
FUNCTIONS



FULL-TIME EXPORT MANAGER

Executes Functions
Manages Projects
Reports to SIA CEO





NEXT STEPS









JUNE/JULY

Further refinement of draft models with SIA, SafeFish, and DAFF

AUGUST

STAG Funding
Partners Meeting to
secure agreement on
path forward

SEPTEMBER/OCTOBER

Approach and consultations with other commodity associations

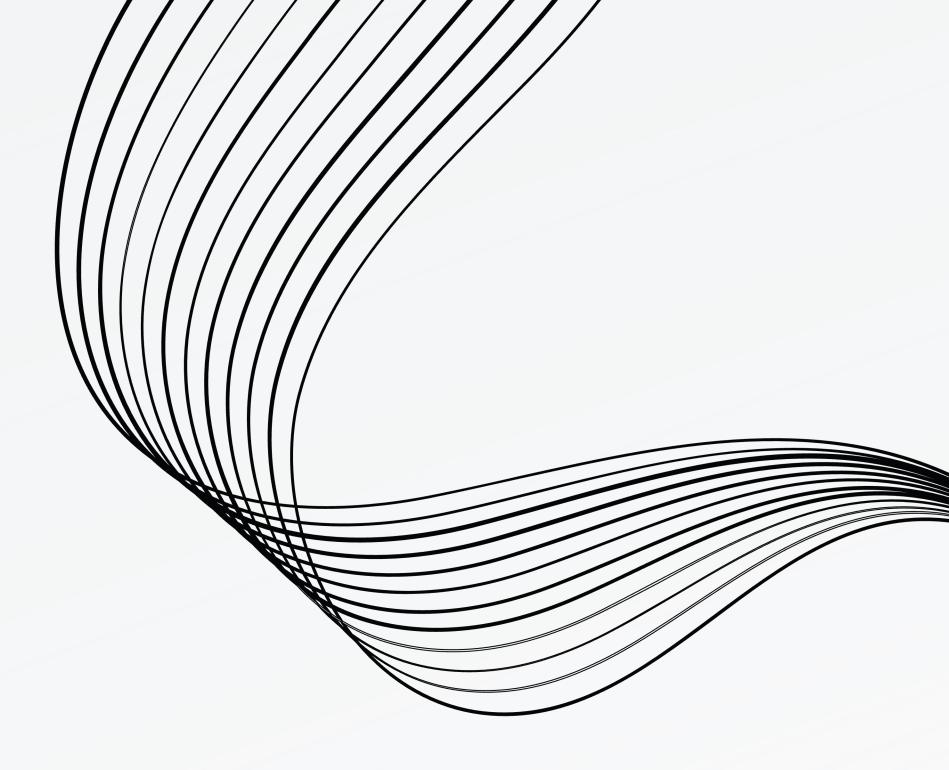
JANUARY '24

Begin gradual handover of functions from STAG to SIA

INDUSTRY DIPLOMACY

TRADE FACILITATION

THANK YOU





| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 3: |
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| Agreed Transition Timetable (January 2024) |
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STAG Transition Plan

Issues to be addressed

- 1. Governance TORs SIA trade committee and sub-committees (sector-based versus issue-based). Current versus new members
- 2. Core functions SIA funded via membership fees versus IPA versus other funding
- 3. Seafood Trade & Market Access Agenda and Action Plan priority setting process and work program
- 4. Funding Partnerships current versus future
- 5. Collaborative Linkages current versus future
- 6. Communications STAG newsletters, SIA newsletters, SIA members versus general comms, One Stop Shop,
- 7. Research trade futures (risk management), market research to support diversification efforts, trade database (FRDC and Tridge)
- 8. Market Intelligence market scanning in multiple markets
- 9. Crisis Management
- 10. Ad hoc response to issues/or potential issues

Timetable

| Month | |
|-----------|--|
| January | Governance TORS agreed |
| February | Core functions, budget and funding source agreed. IPA discussions and if agreed new project development commenced. |
| March | STA 2024-26 Action plan launched and ad hoc response process agreed |
| April | Partnerships and Linkages consultation, communications merged |
| May | Milestone progress report |
| June | Risk management, research program and Market Intelligence arrangements agreed |
| July | All STAG functions assigned |
| August | Implementation support |
| September | Draft final report |
| October | Implementation support |
| November | Final Report |

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 4: |
| Draft Investment Proposal for the Establishment of a |
| New SIA Trade Unit |
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<u>Seafood Industry Australia's</u> International Trade Program Proposal

June 2024

Introduction

Seafood Industry Australia (SIA) is the national peak-body representing the Australian seafood industry. With members from the wild catch, aquaculture and post-harvest sectors, we are the voice of Australian seafood. SIA will advocate government on behalf of the Australian Seafood industry and provide feedback on government policy and regulation, conduct research and raise the image and profile of our members through media and promotion.

In 2022, SIA developed the first a whole-of-industry export market strategic plan in response to challenging market conditions for the seafood industry, be they in the past, present or anticipated for the future. Over 40 stakeholders were interviewed across several sectors (Rock Lobster, Abalone, Southern bluefin tuna, Salmon, Prawn and 'emerging' sectors), ensuring that the diverse needs and goals of the industry were addressed within the strategic plan.

To date, market access representation has been carried out through Honey & Fox as secretariat for the Seafood Trade Advisory Group (STAG). As an FRDC project, STAG is funded by three IPA's - Western Rock Lobster Council, Southern Rock Lobster and Abalone Council of Australia. Since its inception, the three funding partners have guided the trade agenda development and overseen execution.

With SIA now well established and sustainable, the national peak body can support a broad trade program for the Australian Seafood industry, providing services in the areas of market access, market development and industry capacity building. Looking across to other agricultural sectors it is understood that overarching trade programs that incorporate these three areas and provide avenues for industry advocacy are more effective in the pursuit of growth and value creation.

On this basis, in July 2023, STAG entered a final contract with FRDC to transition its activities over to SIA. The due date for the transition is 1 October 2024. Presented below is SIA's proposal for an International Trade Program to provide a combination of overarching and targeted activities and outcomes for sectors who invest in the program.

Our Goal (From SIA's Export Strategy)

To advance Australia's \$1.3 billion seafood export industry, we must invest in market access and market development to build a prosperous and sustainable future for fishers. To ensure reliable and effective trade relationships and representation on access and development issue we need to be investing in the skills and experience of our people.

By 2030, the Australia seafood industry aims to increase its current valuation from \$1.3 billion up to \$2 billion. To do this, we must:

- 1. Foster collaborative relationships with stakeholders both domestically and internationally.
- 2. Create unity within exporting sectors and across exporting sectors to amplify our purpose and ensure that resources are used effectively.



- 3. Deliver on agreed market access challenges and priorities
- 4. Provide advocacy support for industry and exporters and be their national voice
- 5. Help grow value through market development opportunities
- 6. Invest in capacity and capability of our people for long term sustainability of the trade program

The Opportunity

Through this International Trade Program proposal SIA aims to:

- Continue the market access services provided by STAG to WRL, SRL and ACA;
- Expand the current program to include market development and advocacy services;
- Broaden the coverage of the program to include other seafood exporting sectors;
- Increase the number of personnel working in the program to ensure effective delivery of services and to create more depth in industry capacity and capability.

SIA's Trade program will work with industry to develop export opportunities and gain and maintain markets overseas, increasing opportunities and demand for Australian Seafood.

Market access and market development have been highlighted as two key areas of work which will be underpinned by key engagement strategies, including but not limited to, advocacy and the establishment of an International Trade Committee (ITC). Membership to the ITC will be through funding commitments, either through FRDC IPA or through direct funding arrangements

ITC members will provide strategic direction and leadership to SIA in the international trade areas of market access, trade capacity and trade development to achieve growth in the value of Australian seafood exports to \$2 billion by 2030.

For the 2025 year, it is proposed that the STAG funding partners - Southern Rock Lobster Ltd (SRL), Western Rock Lobster Ltd (WRL), the Abalone Council of Australia (ACA) will fund the program through their IPA. At the time of writing we have strong interest to commit funding from Australian Council of Prawn Fisheries (ACPF) and Australian Southern Bluefin Tuna Industry Association (ASBTIA).

To work towards the goal of a whole of industry trade program SIA will invite membership to other species who have an IPA, such as Salmon, Southern Bluefin Tuna, Toothfish, Barramundi and Oysters.

The detailed priorities and actions in relation to this proposal is to deliver the whole-of-industry Export Market Strategic Plan (EMSP), including the Seafood Trade Agenda and Action Plan 2024-26 (STA).

The EMSP and STA was developed in consultation with over forty industry engagement interviews including but not limited to: Rock Lobster, Abalone, Southern Bluefin Tuna, Atlantic Salmon and Prawns. The previous funding partners of STAG and SafeFish have also been consulted to ensure market access priorities and recommend specific actions are prioritised.

This proposal provides a pathway to delivering on the objectives of the EMSP, through the market access and market development recommendations under SIA leadership over the coming years. This objective also encompasses establishing strong association/industry organisation-level relations with counterparts in key markets, aims to strengthen industry capacity to anticipate trade shocks, engage with overseas regulatory systems, and facilitate international technical and other cooperation. It will



facilitate international engagement along the supply chain and with stakeholder groups, such as SafeFish.

This application also focuses on research, development and extension (RD&E), supporting collection, analysis and dissemination of market intelligence and regulatory information to industry stakeholders. It creates capacity to continuously monitor regulatory and other trade-affecting developments in export markets (research), analyse, explain and summarise complex trade information (development), and distribute to exporters, fishers, industry associations, regulators, and other stakeholders (extension). Tools to achieve this include: a weekly market intelligence newsletter service, which is free and available to all; online webinars and workshops to explore issues in depth; market insight reports, Seafood Statistic handbook and production of ad-hoc communications material to support industry objectives.

The project will provide benefits directly for our funding partners to enhance their representative capacity, and for all seafood exporters and fishers participating in export markets generally. The work of SIA's Trade Program has always delivered benefits to the wider seafood exporter community both by pursuing objectives that directly expand their access, responding to crises by helping to diversifying markets and strengthening overall relationships with regulators and other stakeholder groups, including in key markets.

SIA Trade Program is aligned with objectives of the Australian Government's 2021 National Agricultural Innovation Policy Statement (Priority One: Australia is a trusted exporter of premium food and agricultural products by 2030). By supporting access to overseas markets, which are the major driver of demand growth for Australian premium seafood, the project is aligned with the FRDC R&D Plan Outcome One: Enduring Growth for Prosperity. More resilient, predictable, and diversified market access arrangements will "support a sustainable, efficient and effective increase in production, value and price."

The project plays an important role in retaining and developing industry capacity in the areas of market access, crisis management, trade policy, international connectedness, and market awareness and diversification. It provides a platform to ensure key personnel with in-demand skills remain engaged with the seafood industry.

Project summary

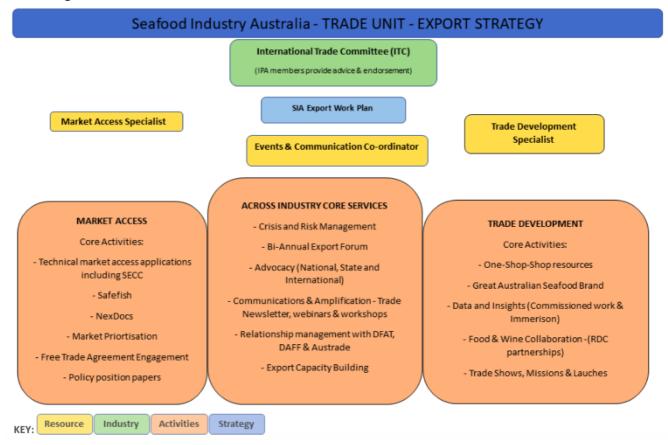
Global markets are becoming more fragmented, and market access barriers are predicted to proliferate at an accelerating speed. Strengthening industry and government capacity to adapt to this changing trade environment is more important than ever. Australian Seafood exports over 60% of their total production causing a reliant on access to foreign buyers and the need for continuation of demand from overseas. Some sections need to switch their focus from the domestic market to export in order to lift prices and improve long-term industry sustainability and profitability.

Recognition that maintaining and expanding access to overseas markets is a critical industry priority led to the creation of the Export Market Strategic Plan. The need for SIA Trade services became more acute after 2020 during the COVID-19 and China disruption shocks and, reflecting this, ATMAC funding was achieved from the Department of Agriculture, however, this is due to come to an end in 2024-2025. Crisis response and management also became a priority in SIA work and lead to SIA developing a Crisis management framework and plan including a risk register on behalf of the whole of Australian Exporting Seafood industries; projects such as this require annual review and maintenance which SIA is in a unique position to be able to service nationally. SIA expect there will be more demand for



seafood market access and development engagement as they service the growing demand by industry, government partners and importers wishing to engage.

Trade Program Overview



International Trade Committee (ITC)

The ITC with be populated by IPA members who will represent the needs of their sector and provide advice into the proposed SIA work plans. SIA will endeavour to bring in as many sectors/IPA's as possible for a broad seafood approach. The ITC will:

- 1. Develop and monitor roll out of SIA Export Work Plan;
- 2. Guiding SIA policy development and advocacy needs of export sector;
- 3. Crisis management framework oversight and action as required;

SIA Across Industry services

- 1. Improved preparedness of future issues through creation and management of the Crisis and Risk Management plan
- 2. Bi-annual export forum
 - a. SIA will organize a biennial event for exporters to come together to discuss known issues, share information on emerging issues, agree on priorities, and provide networking opportunities for seafood exporters.
- 3. Export Planning & Readiness



- a. Stakeholder engagement with species specific associations, bodies, state governments
- 4. Development of a mentoring program and amplification workshops/webinars
- 5. Advocacy (International and Domestic)
 - a. SIA is committed to protecting, promoting and developing the Australian seafood industry domestically and overseas. At the inaugural SIA Members Advisory Forum held in September 2017 industry national issues were discussed, and it was agreed SIA would focus our attention on the most pressing national issues including Market Access and Trade through our advocacy work.
 - b. Activities include but are not limited too; regular engagement with Federal and State Ministers, hosting a yearly Parliamentary Friends of Seafood event and engagement with overseas associations related to seafood trade and access issues.
 - c. Engagement with key associations in China (but not limited)
 - i. For example SIA will establish industry-level relations: the China Inspection and Quarantine Association (CIQA), the China Aquatic Products Processing and Marketing Alliance (CAPPMA), the Shanghai Fisheries Trade Association (SFTA), China Cuisine Association (CCA), China Hospitality Association (CHA), and the China Chamber of Commerce for Foodstuffs (CFNA)

Market Access

Open and defend new opportunities

- 1. SIA to engage with industry and government through centralise committees such as SECC and ITC
- 2. Government engagement of key programs such as NRS, Market prioritisation, NextDoc implementation and maintenance.
- 3. FTA engagement

Market Development

Maintain and Build

- 1. Update of market insight reports and additions
- 2. Seafood Statistic Handbook annual review
- 3. Communication and promotion of assets & creative agency
- 4. Communications back to exporters and opportunities to engage
 - a. Weekly export focus content via SIA Trade News bites
- 5. Develop market engagement programs for advocacy and trade development
 - a. China
 - i. Market launch activities with Austrade, including Rock Lobster media outreach.
 - b. India
 - i. Market development activities to increase the capability of commercial exporters and leverage opportunities to partner with MLA
 - Hosting delegations from Indians Department of Fisheries to attend the Australian Biosecurity Symposium and support aquaculture / fishery visits.
 - iii. Engagement in the Indian Economic Roadmap for Australian Seafood
 - c. EU
- i. Trade Show support for Seafood Expo Global 2025 for exporters wishing attend. SIA will continue to support ongoing FTA negotiations
- d. UAE



- i. Launch event if FTA is confirmed
- e. Food & Wine Collaboration Nations Brand
 - Great Australian Seafood brand opportunity and engagement to leverage exporter capacity building programs through market insights and strengthen partnership with agri-food and wine RDC's.
- 6. Leverage of Australian Seafood Brand through impactful partnerships with IPA's fee for service
- 7. Maintain and improve resources within the one-stop-shop portal

Market Development (targeted activities)

In addition to the core services of the SIA Tarde Program, the program can support the needs of funding partners who require specific or targeted activation services. SIA can provide a negotiated level of service and coordination.

As an example, ACPF has indicated an interest in joining the SIA Tarde Program and in addition to this has further funding that they would like to invest into specific activations that support their priority of diversify markets for wild caught prawn, having built the provenance, product authentication, branding and chef utilisation tools for Australian wild prawns. SIA Market Development Specialist would act as a service provider to the wild prawn activations, the level to which that service would be provided will be specific to the agreement negotiated.

Targeted activities such as these provide increased activity, resource and capability building to the trade program which has a benefit to all program members.

Program resourcing

SIA Trade Program team will include three dedicated roles:

- 1. Trade and Market Access Specialist
- 2. Trade and Market Development Specialist, and
- 3. Trade and Market Support Officer

The Trade Program team will have the support of the broader SIA team and resources including, but not limited to, CEO, General Manager of Policy and Projects, Stakeholder Engagement Manager and Communications Manager.

1. Trade and Market Access Specialist Role (Full time)

Bridge between industry and government on current market access changes and challenges and identify any market development and improvement opportunities:

- Onboarding of new members including identifying new and emerging exporters.
- Market access priorities identified in Trade Agenda/Work plan such as:
 - o Rock Lobster Access Priorities:
 - Restoration and smooth facilitation of trade in live rock lobster to mainland China
 - Restoration of trade in Tropical Rock Lobster with mainland China
 - Abalone Access Priorities:
 - Tariffs for all abalone products exported to South Korea reduced to zero
 - Respond to market access challenges arising from abalone viral ganglioneuritis (AVG)
 - Approval for the use of SO2 in preserved Abalone products in key markets



- Market access prioritisation process and working group for all species
 - Additions to the Approved Species List for Import to China from Australia
 - Resolution of current health certificate issues with China
- Market access prioritisation scheme design and monitoring of a market access prioritisation scheme with DAFF and industry
- National Residues Survey (NRS) working with SafeFish to review and monitor the scheme including developing options for a 'fit-for-purpose' system
- Free Trade Agreements: consultation and submissions
- NEXDOC implementation and monitoring of the government's new digital export certification and documentation system for all seafood exports
- Setting up and managing working group to monitor and response to market access changes including Risk and Crisis task force member
- Monitoring key data and news outlets to inform industry/gov via appropriate communication channels
- Capturing technical market access processes and mentoring next generation
- Export Communications SIA weekly trade newsletter
- Attend SECC committee meetings

2. Trade and Market Development Specialist (Full time role)

Bridge between industry and key networking channels to build relations and connections to drive market access, market access improvements and demand generation.

- ITC Secretariat/Management
- Reporting against Trade Agenda
- Monitoring key opinion leaders to inform trade projects and committees, bring in new and emerging exporters, information sharing
- Trade missions B2G/Ministerial/Austrade
- Free Trade and Economic partnership changes to inform development activities
- Nation Brand activities (Austrade in-country activities) and identify opportunities to build network sand partnerships including project management
- Communication forum creation and representation across all levels of government and key bodies.
- Government engagement Austrade, Ag Counsellors (DAFF/DFAT), Trade Secretaries/Agriculture Counsellors.
- Establishment and maintenance of engagement with key associations such as Australia China Business Council and relevant other key market focussed bodies
- Organising a bi-annual exporter forum (Seafood directions opportunities and leverage comms)
- Management and promotion of assets (GAS, Supplier directory, One-Stop-Shop)
- Program management of the Food and Wine Collaboration Group leverage existing opportunities to grow capacity and capability of exporters and opportunities to partner with other RDC's.
- Data and intelligence resources Seafood Statistic and Market Insight reports
- Risk and Crisis task force management and review.
- Attend SECC committee meetings



3. Trade and Market Support Officer

Support trade and market specialist to ensure smooth function of key activities, projects and priorities.

- Maintain and support program and events in domestic and overseas markets, including engagement with industry stakeholders, service providers and key government bodies.
- Support project and program reporting including information sharing for communication amplification of milestone and program outcomes.
- Coordinate event and program logistics including liaising with suppliers, venues, exporters and ITC administrative tasks
- Maintain records of meetings, events and outcomes including notetaking and working with communications officer to formalise communications
- Role of promoting SIA's Trade program, publicised activities and enhanced export assets through effective communications and public relations materials/methods such as:
 - a) One-stop-stop website
 - b) Weekly trade newsletter
 - c) GAS Social media channel management
- Responsible for maintaining and further developing One-Stop-Shop and GAS presence and communications to improve the exports knowledge and awareness off resources SIA offers.
- Communication link back to SIA core business, working with SIA communications manager
- Ability to manage a variety of stakeholders, keep CRM updated & direct technical needs to market access or development specialist

Key Personal

Veronica Papacosta is the CEO of Seafood Industry Australia (SIA), Managing Director of Sydney Fresh Seafood (Aust) Pty Ltd, a member of the Agriculture Industry Advisory Council, a member of the National Fisheries Advisory Council, and a passionate advocate for the Australian seafood industry. More recently, Veronica has led the development of the industry's export market strategy Veronica brings a wealth of industry knowledge and having started to build capability within SIA the organisation is ready to take on trade facilitation as a core function to members. Veronica has a Bachelor of Economics (major in Marketing and Accounting) from Sydney University, a Diploma in Event Management from University of Technology, Sydney and is a very proud graduate of the National Seafood Industry Leadership Program (NSILP) 2015.

Laura Davies has led the SIA Trade Unit since in July 2023 as the Trade Export Manager, encompassing the work of Market Access, Market development and capability building under the ATMAC program, whilst advocating for the needs of Seafood Exporters. Laura has managed the Export Market Strategic plan and part of the transition of the STAG program of work into SIA. Laura manages relationships with Austrade, DFAT, DAFF and Australian Seafood Exporters. Before SIA, Laura worked for Tridge, a South Korean Agri-food trading platform, where she led the export sales of Australian Horticulture into Asia. Laura's trade experience also extends to Research and Development corporation, Hort Innovation. As the International Market Development Manager, for several years, Laura managed the national export brand "Taste Australia". Project management activities included global marketing campaigns, overseas trade missions, trade shows and retail education programs. Laura has a BSc honours in Agri-Business Management from Newcastle University and is a graduate of Pure Leith Culinary Institute.

Mr Robertson has provided market access and trade representative services to the STAG since 2021. Before that, he was Manager of International Trade for the national pork industry (APL) from 2016, securing more favourable access arrangements for Australian pork into key markets, such as



Singapore, Taiwan, and the USA, and opening new access into the United Arab Emirates. Mr Robertson worked for nine years in the Department of Foreign Affairs and Trade, including four years in Beijing, where he worked on Australia's Free Trade Agreement with China. He has skills in government and stakeholder relations, market access policy and regulation, negotiation of trade agreements, overseas trade marketing, inbound and outbound delegation management, in-market event management, project management, and representation. Mr Robertson holds a Bachelor of Arts (Hons) from the University of Queensland, where he majored in International Relations. He is a graduate of the Australian Rural Leadership Foundation Trail Program, and the University of Melbourne's Meat Executive Program. He speaks fluent Mandarin Chinese and conversational Japanese and Indonesian.

Investment

The main source of program funding will be via a Trade Program membership model that can be funded through an FRDC IPA or a direct payment arrangement.

The program will work to secure alternative sources of funding via government grant opportunities (e.g. ATMAC, EMDG, DFAT, FRDC grant rounds) and will also receive an administration fee for any activations it is contracted to complete.

Total budget available will depend on the number of members that subscribe to the program membership. Minimum revenue requirements are expected to be approximately \$500,000 per annum to cover salaries, meetings, travel and activities.

Outputs and Outcomes

- Areas of work within the five Strategic priorities of the Export Market Strategic Plan
- Seafood Trade Agenda and Action Plan for Abalone, Rock Lobster and Prawns
- 6 monthly trade and market access activities reports
- Weekly market intelligence newsletters
- Seafood statistics handbook yearly
- Market insights report and updates to the one-stop-shop
- Engagement with Austrade in key trade missions
- Bi-annual forum held for Seafood exporters
- Uptake of export bursaries for seafood exporters
- Project management of the Food and Wine Collaboration
- Memoranda of Understanding to formalise relations with export market counterpart organisations

Performance indicators

- Progress against the priorities identified in the Export Market Strategic Plan and STAG Agenda
- Maintenance of the International Trade Committee
- Maintenance of an export crisis management capacity.
- Input to ITC, SECC, Safefish and other forums provided as needed.
- Market Intelligence Service delivered and communicated
- Activities to diversify markets (non-China)
- Engagement with exporters including bursary uptake



• Establishment of formal relationships with relevant counterpart organisations in key overseas markets and government bodies; DFAT, DAFF, Austrade.

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
|---|
| |
| Attachment 5: |
| Final Draft Seafood Trade Agenda and Action Plan (2024-2026) ready for publication by SIA |
| |
| |
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| |

Securing Australia's International Seafood Trade:

Seafood Trade Agenda and Action Plan 2024-2026

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Executive Summary

According to ABARES¹, the gross value of Australian fisheries and aquaculture production in 2022-23 was forecast to rise by 8% to \$3.63 billion, with exports representing \$1.3 billion of this. Atlantic Salmon, Rock Lobster, and Abalone sectors together dominate this trade.

This Seafood Trade Agenda outlines the priority seafood trade and market access issues for 2024-2026. The Agenda highlights rock lobster and abalone export market priorities as well as wider "overarching" trade objectives. Acknowledging the role of Seafood Industry Australia (SIA) as the national peak body, the Seafood Trade Agenda and Action Plan 2024-26 aligns its objectives with SIA's Seafood Export Strategic Plan and was developed in consultation with SIA.

ABS data² shows a total export value of lobster and abalone in 2022-23 of \$568 million, down from \$688 million in 2019-20. The decline in export values is attributed to the impact of the COVID-19 pandemic and the trade disruptions for lobster to China. Despite significant efforts by exporters to develop other markets, China is still the most important export market by volume and value.

Protecting and growing Australia's seafood markets internationally requires a coordinated approach from industry and government working together to address those issues that have the potential to benefit the most businesses and generate the greatest return for the Australian economy.

Rock Lobster:

- 1. Restoration and smooth facilitation of trade in live rock lobster to mainland China
- 2. Restoration of trade in Tropical Rock Lobster with mainland China

Abalone:

- 1. Tariffs for all abalone products exported to South Korea reduced to zero
- 2. Respond to market access challenges arising from abalone viral ganglioneuritis (AVG)
- 3. Approval for the use of SO2 in preserved Abalone products in key markets

Overarching Priorities:

- 1. Additions to the Approved Species List for Import to China from Australia
- 2. Resolution of current health certificate issues with China and implementing NEXDOC
- 3. Review of the National Residues Survey (NRS) for the wild-catch sector, including options for a 'fit-for-purpose' system (within the existing budget)
- 4. Design and implementation of a market access prioritisation scheme
- 5. Achieving positive outcomes for seafood from Australian FTA negotiations with the EU, India, and Gulf Cooperation Council

In addition to these priority issues as part of the Seafood Trade Agenda, the Action Plan identifies priority activities that will support all market access objectives and improve industry-government consultation.

Priority Activities:

¹ Australian fisheries and aquaculture outlook to 2027–28, Robert Curtotti, Michael Dylewski, Angela Cao and Harrison Tuynman, Research by the Australian Bureau of Agricultural and Resource Economics and Sciences, March 2023

² Australian Bureau of Statistics, Information Consultancy Services, 2007, cat. no. 9920.0, Canberra, accessed at https://www.frdc.com.au/seafood-import-and-export-species-includes-exchange-rate

- 1) Improving consultation and communication with Australian government
- 2) Establishment and maintenance of organisational relationships with relevant industry bodies in key markets
- 3) Organising a biennial exporter forum
- 4) Monitoring and responding to emerging market access changes

Details about these priorities and actions to be taken are provided as well as key communication messages. The cornerstone of the success of the STAG to date has been the partnership arrangements with the government, the technical support provided by SafeFish, and the funding support from FRDC, ACA Ltd, WRLC and SRL Ltd. The STAG will transition to become integrated with SIA in mid-2024.

Australian Seafood Trade Agenda 2024-2026

Purpose of this document

This document details the trade and market access priorities as determined by the Abalone and Rock Lobster sectors. The priorities detailed in this agenda are separated into three sections.

- 1. Rock Lobster Priorities
- 2. Abalone Priorities
- 3. Overarching Priorities. Note: These impact rock lobster and abalone sectors, and, if resolved, will deliver potential benefits to exporters from other sectors.

Summary Trade & Market Access Priorities for 2024-2026

The following tables detail the market access priorities, the impact that it is having on the industry and the desired outcome from the resolution of the issue.

Rock Lobster

| Issue | Impact | Desired outcome |
|--|--|---|
| Restoration of access for live lobster to mainland China | The disruption caused by this issue has been extensive. Even if access is restored, efforts will be needed to facilitate trade back to prepandemic levels. | Smooth resumption of trade with mainland China, including documentation, testing regimes, import permits, and quotas. |
| Restoration of access for Tropical Rock Lobster to China | Tropical Rock Lobster (<i>Panulirus Ornatas</i>) has been listed as a protected species in China, prohibiting import to China of wild-caught product from any country. | Removal of Tropical Rock Lobster (<i>Panulirus Ornatas</i>) from protected species status in China trade resumed. |

Abalone

| Issue | Impact | Desired outcome |
|---|--|--|
| Reduction of tariffs for South Korea | Current high import tariffs on Australian abalone (20%) restricts the ability for Australian product to access previous niche live markets for which there in known demand for the larger size wild-caught fish. | Zero tariff to be applied to all Australian abalone imports. |
| Respond to market access challenges | The outbreak of Abalone viral ganglioneuritis in South Australia is a serious biosecurity | Industry is alert to market access restrictions and |

| arising from abalone viral ganglioneuritis | issue with potential implications for overseas market access. | ready to respond nationally in a coordinated manner. |
|---|---|--|
| Approval for use of SO2 in preserved abalone in key markets | SO2 is approved by CODEX for use as an antioxidant and as an anti-browning (bluing) agent. Restrictions in key markets may impede growing exports of canned and pouched product to diverse markets. | SO2 approved for use in canned abalone at an appropriate level in target markets |

Overarching Priorities

| Issue | Impact | Desired outcome |
|--|---|---|
| China approved species list | The limited approved species list for non-viable seafood products is impeding export growth to China. The loss in export earnings is estimated in the millions of dollars each year. | Acceptance by Chinese authorities of all requested Australian species. |
| Export Documentation and Processes | The current arrangements for printing and issuing Health Certificates for China are not adequate with antiquated equipment that can cause significant delays for exporters time-sensitive products such as live seafood (not only Rock lobster). It is hoped these issues will be resolved with the implementation of the NEXTDOC system scheduled for 2024 | New arrangements that do not require the physical printing of health certificates for exports to China. A smooth transition to NEXDOC as scheduled in 2024 |
| National Residue Survey (NRS) program review | The current NRS program does not provide adequate data on key residues of importance to the rock lobster and abalone export industries. The lack of such a program was a key complicating factor in efforts to restore China market access. | Options identified within the current budget for a 'fit-for-purpose' wild catch program that provides better support for market access negotiations. |
| Market access priority-setting process | While the STAG has a priority-setting process with funding partners, this has not extended to the broader industry. The government is currently developing and testing a market access prioritisation process. Industry needs to monitor and support the implementation of the process | A robust framework between industry and government to determine agreed strategic market access priorities and ensure resources are directed toward high-impact outcomes with high probabilities of success. |
| Free Trade Agreements with the | Trade agreements provide an opportunity to reduce tariffs and other | Zero tariffs on Australian seafood in FTA partner markets, |

| EU, India, and Gulf | barriers to trade, increasing the | removal of non-tariff barriers to |
|----------------------------|---|------------------------------------|
| Cooperation Council | competitiveness of seafood exports. | trade, favourable rules of origin, |
| | Free and open access to a range of | and measures that support |
| | markets supports diversification efforts. | sustainability and fisheries |
| | | management. |

Seafood Trade & Market Access Priorities Action Plan

This Action Plan includes general and issue-specific details of actions to support the resolution of the trade and market access priorities outlined in this Seafood Trade Agenda 2024-2026. Additionally, four priority activities are identified up front:

Priority Activities

| Issue | Impact | Desired outcome |
|---|---|---|
| Government relations | STAG maintains close and constructive relationships with government officials in relevant departments. However, as the trading environment becomes more complex and industry undergoes transition, these ties are more important than ever. | Robust and effective industry- government relations at all levels. |
| Establishment and maintenance of organisational relationships with relevant bodies in key markets | Peer-to-peer relationships with counterparts in key markets are lacking. Strengthening these will support market intelligence, early warning systems, capacity building, and in-market advocacy efforts. | Formalised relationships with key organisations in priority markets, incorporating a program of regular talks, exchanges, and two-way visits. |
| Organising a biennial exporter forum | The last industry-wide exporter forum was held in 2014. Under SIA leadership, there is an opportunity to re-establish a regular, cross-sector consultative event to support seafood trade objectives. | A biennial event for exporters to come together to discuss known issues, share information on emerging issues, agree on priorities, and provide networking opportunities for seafood exporters. |
| Monitoring and responding to market access changes | Importing countries frequently revise and update requirements for seafood imports. When these changes occur suddenly, the impact on industry can be severe. | Industry is notified of changing access conditions in a timely fashion, can raise any concerns prior to implementation, and has time to adjust if necessary. |

General Principles

These are the general principles by which the SIA will operate and work with partners to resolve the priority market access issues outlined in this plan.

| Focus on priority issues | Maintain a focus on resolvin | g the agreed pr | iorities action issues detailed |
|--------------------------|------------------------------|-----------------|---------------------------------|
|--------------------------|------------------------------|-----------------|---------------------------------|

in the Seafood Trade Agenda 2024-2026 and ensure these are regularly communicated to the government as opportunities arise to resolve them.

Act with a unified voice Through the STAG-SIA transition process, strengthen the combined voice

of the seafood export sector and ensure that the priorities included in

the Action Plan are adopted and advanced by SIA.

Expand and diversify international markets

Maintain and extend the STAG market intelligence service to support the

maintenance of and further expansion of international market opportunities by Australia's seafood export sector.

Foster collaborative government relationships

Maintain and further enhance government relationships to ensure that the seafood industry trade priorities are understood and promoted at every opportunity, particularly during government to government market

access discussions and visits

Use consistent messaging

Develop and use consistent key messages (see Communications Plan) to provide a responsive and coordinated response to governments in the event of a trade disruption to ensure quick resolution and resumption of

trade.

Support international trade negotiations

Provide cohesive industry information to support international trade and market access negotiations, including economic and community benefits

provided by a strong seafood export sector.

Communicate with the broader seafood exporter community

Maintain a communications platform to support exporter communication and provide a capability to coordinate a response to new and emerging

trade and market access issues.

Detailed actions for Rock Lobster priorities

Restoration of access for live lobster to mainland China

Background

Australian live lobster imports into mainland China have been restricted since November 2020 (see Appendix Background for more detail). Since then, the STAG has worked with lobster representative bodies, SIA, exporters, FRDC, DAFF and SafeFish to coordinate the industry's response and work with the federal government to regain market access. A national Lobster Working Group (LWG) with representation across all export species coordinates this response, including the commissioning of a cadmium survey with SafeFish to assess the risk of potential heavy metal contaminants. While the length and severity of China's restrictions on live lobster might be motivated by high-level political considerations over which we have no influence, some technical avenues can be pursued, allowing for a potential 'face-saving' reversal of the trade-blocking measures and providing some insurance against future detections.

If a breakthrough is reached, it may come suddenly. This means industry and government need to be ready to resume trade. Issues that may arise include:

- The current system of providing health certification is based on severely outdated equipment and is heavily restricted by the limited availability of departmental staff outside of regular office hours.
- Up to date establishment registration will be crucial to the speedy resumption of trade. STAG
 has worked with DAFF and exporters over the last two years to ensure industry compliance with
 the recently introduced China Imported Food Enterprise Registration (CIFER) system and will
 continue to monitor the situation
- On the Chinese side, there may be delays or issues for local buyers in obtaining import quota or permits to facilitate live lobster imports, as these mechanisms have not been used for three years.

| Proposed Actions | Continue to support the LWG, Safefish and DAFF in developing and implementing appropriate technical responses to support the resumption of trade with China. This could include extended testing of lobster tissue, options for pre-export measures to provide assurances the risk is being managed, and technical expert exchanges (e.g. SafeFish) with a Chinese counterpart agency/organisation |
|------------------|--|
| | Continue to engage with DAFF to ensure preparedness for the resumption of trade. This will include monitoring potential issues on the Chinese side. |

Restoration of access for Tropical Rock Lobster to China

Background

In September 2023, China announced a global ban on "wild caught" tropical rock lobster (TRL), *Panulirus ornatus*). We understand that the relevant Chinese authorities placed *Panulirus ornatus* on a Class II

protected species list and banned customs import permits and quotas of this species at every entry port to China.

A sub-group of the Lobster Working Group has been established to coordinate industry's response.

STAG is supporting DAFF and DFAT in their representations to the Chinese government on this matter. The industry's position is that countries should take a science-based approach to managing threats to wildlife. On this basis, there are good reasons to relax restrictions on TRL sourced from Australia. *Panulirus ornatus* is classified as a species "of least concern" on the International Union for Conservation of Nature (IUCN) list.

| Proposed Action | Coordinate industry information-sharing, communications, and approaches to the issue through the TRL Working Group. Monitor the situation with impacted exporters. There may be opportunities to coordinate response with other exporting countries affected by the restrictions. These include Papua |
|-----------------|---|
| | New Guinea, South Africa, Vietnam, and Thailand. By combining our voices, this group might be able to make a more persuasive and urgent case. |

Detailed actions for Abalone priorities

Reduction of tariffs for South Korea

Background

Korea applies import tariffs on Australian abalone of up to 20%, restricting the competitiveness of Australian products in potentially lucrative niche live markets, where there is known demand for the larger size wild-caught fish.

Unfortunately, the Korea-Australia Free Trade Agreement (KAFTA) and the Regional Cooperative Economic Partnership (RCEP) negotiators failed to target these tariffs, so no preferential treatment is available for Australian exporters. Neither KAFTA nor RCEP incorporates a general review mechanism that would allow negotiators to re-open tariff discussions.

Korea has shown interest in joining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which would necessitate a negotiation on market access and tariff concessions for CPTPP members, which include Australia.

| Proposed Action | Should Korea proceed with a formal CPTPP accession process, make | |
|-----------------|--|--|
| | representations to Australian negotiators regarding the elimination of abalone | |
| | tariffs as part of Korea's CPTPP application. | |

Abalone viral ganglioneuritis

The outbreak of abalone viral ganglioneuritis in South Australia in March 2024 has the potential to affect overseas market access arrangements for the wild-caught abalone export sector. In response to perceived food safety and biosecurity risks, importing countries may place geographic or other restrictions on Australian abalone as a result of the outbreak. The industry must be ready to respond to these barriers by resolving safety issues and reassuring trading partners.

Proposed Action Monitor importing country requirements for new restrictions arising from the outbreak. Provide a conduit for information flow between government and industry, where appropriate. In the event restrictions are imposed, convene a national-level group of abalone export industry stakeholders, including SIA, ACA, SafeFish, and

industry representatives to coordinate responses.

SO2 in preserved abalone for China

Background

SO2 is approved by CODEX for use as an antioxidant and as an anti-browning (bluing) agent. Restrictions impede exports of canned and pouched products in some markets because the use of SO2 in those products is not permitted. Ensuring smooth access for products with the appropriate level of SO2 in key overseas markets will support exporters in finding new customers and diversifying relationships.

| Proposed Action | Work with industry to identify key overseas markets where SO2 restrictions |
|-----------------|--|
| | impede access. Ensure this information is entered into the Market Access |
| | Prioritisation framework with DAFF, so that an approach to managing |
| | restrictions can be advanced at government level. |

Detailed actions for overarching priorities

National Residue Survey (NRS) program review

STAG has longstanding concerns about the NRS program for wild-caught seafood. The suitability and effectiveness of the program were called into question during the disruption of the live lobster trade with China. The NRS data was insufficient for a detailed response to the Chinese authorities.

STAG has consistently raised the need for a 'fit-for-purpose' NRS regime for wild-capture seafood and expressed a willingness to engage with DAFF, SafeFish, and SIA in a review of the NRS on many occasions, including through the Seafood Export Consultative Committee (SECC) process and during face-to-face meetings. SIA currently chairs the SECC.

| Proposed Action | Continue discussions on the NRS with DAFF, SIA, and SafeFish. We are aiming |
|-----------------|---|
| | for a comprehensive review of current difficulties in the NRS and options |
| | (within the current budget) to address the issues |

China approved species list

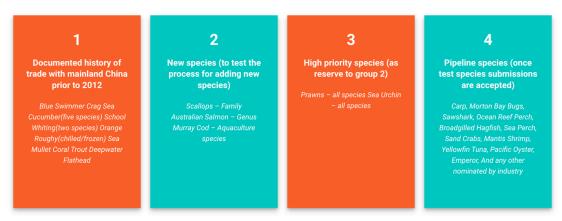
A species must be on the "approved species list" for the source country to be eligible for export to China. Every country has a specific list and can request the General Administration of Customs China (GACC) to include more species.

In 2018, China introduced a new approved species list for Australia, which omitted several key Australian export species previously traded with China.

Since the publication of the new list, Australia has tried to have species added. Initially, China advised that any species with a trade history could be added to the list by providing proof of trade and some species were added through this. . In 2019, China requested risk dossiers to be submitted with any request for additions to the list and that only three requests would be considered at any one time.

An industry-wide consultation was conducted in late 2019, culminating in an industry meeting in Melbourne. At that meeting, industry and government agreed on the priority species to be submitted to GACC for consideration in four stages. This is detailed in Figure 1 below.

Figure 1: Agreed priorities for submission to China for new species to be added to the approved import list.



Since then, there has been limited forward movement in adding new species to Australia's approved list due to the downturn in bilateral relations since that time. However, the situation is improving, and the climate for advancing Australia's requests may be more favourable over the course of the 2024-26 Trade Agenda and Action Plan.

| industry to ensure readiness to comply with government requirements. This could include support for the compilation of technical data, risk dossiers, economic cost-benefit studies, and strengthening relationships with in-marke counterparts. | Proposed Action |
|--|-----------------|
|--|-----------------|

Market access priority-setting framework

The STAG has led efforts with SIA, DAFF, and SafeFish to establish an agreed framework for submitting, assessing, prioritising, and monitoring seafood market access issues.

DAFF has proposed an open system for export stakeholders to alert the department of market access requests. The requests are then analysed using a points-based system to determine the relative importance, difficulty, and cost of addressing the issue. An industry/government working group then assigns a priority level to each issue and jointly monitors progress on resolving it.

| Proposed Action | Work is well advanced on this, and we anticipate the framework will be |
|-----------------|---|
| | operational by mid-2024. Attention will then turn to aligning the system with |
| | industry priorities and communicating how to use the system, while |
| | supporting sectors to provide the information needed. |

Free Trade Agreements

Ongoing participation in shaping the government's Free Trade Agreement agenda and its position in various negotiations will remain an industry priority, due to the obvious benefits (and risks) these agreements can bring. Continued involvement in trade policy debates to represent the interests of the rock lobster and abalone industries will be led by SIA after mid-2024 when STAG funding expires.

Currently under negotiation are agreements with the European Union (although these appear to have stalled at the times of drafting), India, and the Gulf Cooperation Council. Here is a summary of the main issues.

European Union

The European Union is a very large seafood importer and could be an opportunity for high-value, sustainable Australian products.

Rock lobster exporters view the EU as an important part of their diversification strategy. The market is large enough to accommodate larger volume shipments, and affluent enough to pay a premium for high-quality goods. Exports grew from less than A\$200,000 in 2020 to more than A\$5 million in 2021, driven mostly by increased availability of western rock lobster at lower prices. Abalone exporters send small consignments to premium food service venues, predominantly targeting France, where the local culinary tradition includes abalone.

The EU maintains high Most Favoured Nation (MFN) tariffs between 10 - 25 percent on seafood products. Eliminating these duties would remove a major competitive obstacle for Australian seafood exporters and is the top benefit from an EU FTA.

India

India is a niche market, and some lobster and abalone exporters have begun to explore the opportunities. New access for live format lobster products granted by Indian authorities in mid-2023 is facilitating more trade. Live abalone exports still lack an agreed health protocol.

While an interim arrangement, the India-Australia Economic Cooperation and Trade Agreement (IA-ECTA), was agreed upon and implemented in late 2022, a 'comprehensive' agreement is still under discussion. For example, IA-ECTA offered immediate relief from India's high tariffs on live lobster. However, reductions on frozen lobster formats were less attractive.

Gulf Cooperation Council (GCC)

The GCC is a small overall market for Australian seafood. Australian seafood export commodities to the UAE in recent years have included toothfish, rock lobster, mussels, and abalone.

While toothfish has traditionally been the top export by value, Western Rock Lobster sales have experienced rapid growth in the past two years, reaching \$1.1 million in 2021 to become the top Australian seafood export to the UAE.

Australian negotiators are hopeful that the GCC FTA, or a smaller interim agreement with the UAE, will offer the complete elimination of all tariffs on Australian seafood products.

Proposed Action

Continue to prepare policy submissions, reflecting the interests of Australian seafood exporters in the target markets.

Due to the high number and complexity of the EU's non-tariff measures, including in relation to MRLs, catch certificates, and establishment listing, continue to advocate for all FTAs to establish a committee on technical barriers to better facilitate compliance and access. Engage with the government on these objectives when negotiations resume or whenever the opportunity arises.

As a starting point for the comprehensive India-Australia FTA negotiation with India, we have advocated for completely eliminating all seafood tariffs on entry into force for all Australian seafood products. Continue to monitor the situation

Export Documentation

The current arrangements for printing and issuing Health Certificates for China are not adequate with antiquated equipment that can cause significant delays for exporters time-sensitive products such as live seafood (not only Rock lobster). The requirement to book in-person appointments in advance with a small number of authorised DAFF staff, especially for weekends or holiday periods, is another challenge to timely facilitation of trade. STAG has concerns about the capacity of the system to handle the expected volume of requests that would accompany resumed love trade with China.

DAFF plans to resolve these issues with the implementation of the NEXDOC system, a digital hub for the generation of export documents, featuring automated processes and 24/7 self-service for exporters. Dairy was the first commodity group added to the system, with eggs and apiculture products soon to follow (December 2023). DAFF has advised that the process of adding seafood to NEXDOC has started, but full implementation is not expected until early FY 2024/25.

Proposed Actions

Monitor and support DAFF's objective of rolling out NEXDOC for seafood in early FY 2024/25. Hold DAFF accountable to this timeframe.

Explore interim measures to alleviate pressure on the system, including support for DAFF negotiating an e-cert arrangement with GACC or looking at what can be done with PDF documents.

Monitoring and responding to market access changes

Importing countries frequently revise and update requirements for seafood imports. When these changes occur suddenly, the impact on the industry can be severe. Conversely, new or improved access can open new opportunities. For example, in October 2023, DAFF advised that access for live Eastern Rock Lobster had been secured.

STAG maintains a watch on market access changes through daily media monitoring, official announcements from governments, WTO and CODEX notifications, and industry information networks. Updates are communicated weekly to the industry via the STAG newsletter services.

In the reporting period, STAG has been following several proposed and/or developing market access changes (those not already covered under priority work) in key and prospective markets, including:

Global

The Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)
has listed South African abalone and imposed restrictions on international trade. STAG is
monitoring the possibility that Australian species could also be listed and subject to similar trade
bans.

China

 Proposed changes to food packaging requirements (potential to affect exporters of processed foods, including abalone)

USA

- Extension of the Seafood Import Monitoring Program to encompass a wider array of species (now delayed until further notice)
- Implementation of the Food Safety Modernization Act 'Final Rule', which imposes new record-keeping requirements for food manufacturers (implementation from 2024)

EU

- New requirement to notify EU-listed establishments whenever a sample of fish from their establishment has been found to have residues or contaminants at levels above EU maximum limits (now in force)
- New requirement for additional residue testing in some species, including for histamine, as a result of recent EU remote audit of Australian facilities (soon to be implemented by DAFF)

India

 Updates to health certificates (a relatively longstanding issue, but with an interim solution in place)

Indonesia

• New Halal Law could have implications for exporters by imposing new requirements around shipping, handling, labelling, and (in the case of aquaculture) feed.

Bangladesh

Reported informal ban on Australian crustacean imports (more information sought from DAFF)

| Proposed Action | Maintain a watching brief on known issues, scan available information for emerging issues, assess the potential impact on seafood exporters, and provide information to industry in a timely fashion. |
|-----------------|---|
| | Seek feedback from industry and liaise with SIA and DAFF if a new market access change has the potential to harm exports. Coordinate official industry responses with SIA as needed. |

Alignment with SIA Export Market Strategic Plan

Seafood Industry Australia's Export Market Strategic Plan (EMSP) aims to achieve the goal of \$2billion in export value by 2030. It will do that by addressing global and local challenges, establishing a collective industry voice, and uncovering new market opportunities for the industry. There are five Strategic Priorities and associated recommendations, as summarised in the table below.

Table 1: The Seafood Industry's Export Market Strategic Plan (EMSP).

| Strategy | 1 |
|-----------|--|
| _ | en collaboration: Work with all levels of government and industry to leverage available xpertise and support |
| 1.1 | Build government relationships and connections |
| 1.2 | Establish a shared and inclusive voice of the industry |
| Strategy | 2 |
| Establish | a future focused approach: Effectively identify and respond to trade opportunities |
| 2.1 | Support industry preparedness to address future challenges |
| 2.2 | Develop a series of sub-committees to coordinate long-term planning, engagement, and responses on key trade agendas |
| 2.3 | Develop and implement market engagement and networking programs |
| - | export capacity and capability: Enable access to export market resources, communication and nce, and make them easier to use |
| 3.1 | Create a one-stop-shop trade portal to house resources |
| 3.2 | Establish tailored extension programs to lift exporter capabilities |
| Strategy | 4 |
| Support | export readiness: Build the number and capability of exporters across the industry |
| 4.1 | Provide support to businesses to identify existing export planning and readiness |
| 4.2 | Develop an export capability and mentoring program |
| Strategy | 5 |
| | nicate and grow 'Brand Australia': Strengthen the Australian seafood brand to help nicate the value of our industry to customers globally |
| 5.1 | Assessment and consolidation of ongoing branding at all levels to find opportunities and establish a whole-of-industry value proposition |
| 5.2 | Establish industry consensus on collective export marketing and promotion |
| 5.3 | Develop a whole-of-industry marketing and promotion plan |

The Seafood Trade Action Plan 2024-26 is aligned strongly with the recommendations of the ESMP in Strategic Priorities 1-4. This relationship is summarised in table x below.

The Seafood Trade Action Plan provides the strongest support for the EMSP in Strategic Priorities One and Two, which deal with industry/government collaboration and a future focus for the industry. It will make a strong contribution to achieving the objectives of the EMSP in these areas.

Table 2: Alignment of the Seafood Trade Action Plan 2024-26 with the Seafood Export Market Strategic Plan recommendations

| | | | | _ | | | _ | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 1.1 | 1.2 | 2.1 | 2.2 | 2.3 | 3.1 | 3.2 | 4.1 | 4.2 |
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| Х | | Х | Х | | Х | | Х | |
| Х | Х | Х | Х | | Х | | Х | |
| Х | | Х | | | Х | | Х | |
| Х | Х | Х | | Х | Х | | Х | |
| | X | X | X | X | X | X | X | X |

Australian Seafood Trade Agenda –Communications

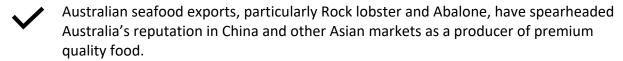
Aims

Communications about the Australian Seafood Trade Agenda aims to

• Inform Government stakeholders of the issues at hand, including the rationale for prioritising the issues that have been identified in the Trade Agenda

- Demonstrate the responsive and proactive approach of the industry to protecting Australia's seafood trade and market access and the specific industry sub-group issues.
- Reinforce that there is industry consensus around a set of key issues while still identifying the specific issues that face each industry sub-group.
- Recognise the innovative strategies already being enacted by the industry to protect Australia's seafood reputation and premium positioning in global markets.

Key Messages



The farmgate value of Australian seafood exports in 2022-23 was \$1.3 billion, from a total industry value of \$3.63 billion.

The major export destinations are China, Hong Kong, and Japan.

The Australian Seafood Export industry is a significant economic contributor to Australia, particularly in coastal and regional areas where they provide important sources of employment and are integral to the well-being of many communities.

Seafood exporters and industry leaders are taking the lead in identifying ways to strengthen Australia's international seafood trade and have developed a plan (the Seafood Trade Agenda) to do this.

The Seafood Trade Agenda lays the foundations for creating long-term productive industry-government relationships to underpin the sustainable growth of Australia's international seafood trade.

The Seafood Trade Agenda details an agreed prioritised list of trade and market access issues developed by Australia's rock lobster and abalone exporters.

The seafood industry understands the basic responsibilities and limitations of the Australian government in providing support to address the priority trade and market access issues and investing in gathering robust scientific information to underpin trade and market access negotiations.

Appendix 1: Australia's Seafood Trade

This document provides background context to the Seafood Trade Agenda and Action Plan 2024-2026, describing Australia's seafood export performance and the global trade environment over the period of the previous Trade Agenda and Action Plan. It looks at the overall breakdown of trade by major exported species and major markets, examines rock lobster and abalone export performance and trade

outlook, provides background on market disruptions, and describes developments in Australia's network of Free Trade Agreements.

Overview of seafood exports

Australia maintains an international reputation as a producer of high-quality, safe, and sustainable fish and seafood, allowing producers to sell at a premium across international markets.

Despite having one of the largest fishing zones in the world, Australia is a minor producer of wild-caught fisheries products globally. This is due to the comparatively low biological productivity of the Australian marine environment in combination with the careful management of Australian fisheries to ensure long term sustainable seafood production. The aquaculture sector accounts for a growing proportion of annual seafood production.

In line with the relatively low volume of production, Australia is a modest exporter of seafood products overall. However, it is a key global exporter of certain high-value species. Australia ranks first in global exports of rock lobster and southern bluefin tuna. It accounts for 35% of wild-caught abalone production and is the world's largest exporter of these products, which fetch a premium in export markets³.

Table 1 and Chart 1 below show the values of top exported species over the past four years.

| Table 1: Top Species of Australian seafood exports (A\$ million) | | | | | | | |
|--|-----|-----|-----|-----|--|--|--|
| Source: Australian Bureau of Statistics | | | | | | | |
| Species 2019-20 2020-21 2021-22 2022-23 | | | | | | | |
| Salmon | 189 | 250 | 408 | 442 | | | |
| Rock Lobster | 544 | 381 | 358 | 412 | | | |
| Abalone | 144 | 149 | 156 | 156 | | | |
| Bluefin Tuna 129 90 111 85 | | | | | | | |
| Prawn | 98 | 74 | 29 | 3 | | | |

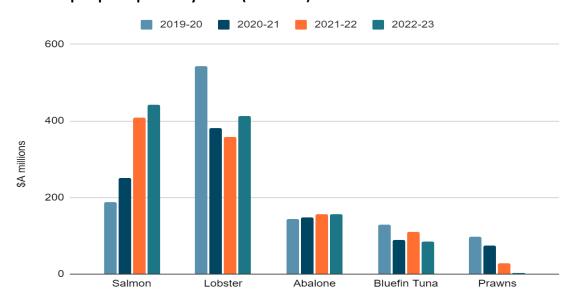


Chart 1: Top export species by value (ABS data)

With the decline in rock lobster exports to China since 2020-21, farmed Atlantic salmon has become Australia's number one seafood export commodity by value. Salmon exports have shown strong, consistent growth, especially when the impact of the Covid-19 pandemic is taken into consideration.

The value of abalone exports was \$156 million in 2022-23 growing only modestly since 2019-20 but still below export levels in previous years.

Bluefin Tuna was the fourth most important export species by value. Export values dropped from \$129 million in 2019-20 to \$85 million in 2022-23. Sales of all tuna species are tied closely to the Japan market and to a large extent reflect economic and consumer trends in that country.

Prawns have seen the worst performance of all export species. Exports have collapsed from \$98 million in 2019-20 to just \$3 million in 2022-23. According to ABARES, Australian exports of prawns decreased by 62% in 2021–22 to 1,534 tonnes, reaching the lowest level since 1998–99. Exports are projected to remain at subdued levels over the period to 2027–28.

Overview of key markets

The leading export destinations for Australian seafood in 2022-23 were China (A\$395 million), Hong Kong (A\$226 million), Japan (A\$146 million), the United States (\$113 million), and Taiwan (A\$108 million). Combined, these destinations account for over 75% of fishery exports, reflecting industry's focus on the East Asia region where there is high and growing demand for Australia's specialty aquatic produce.

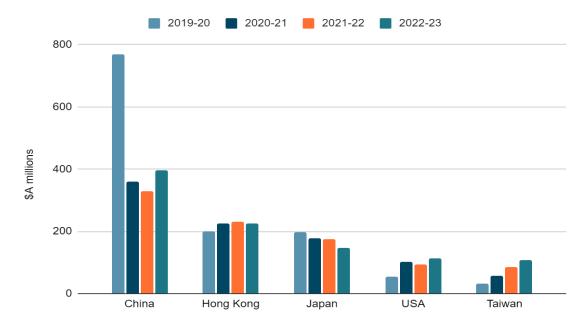
The number one destination for Australian seafood exports is still mainland China. However, reflecting the impact of the Covid-19 pandemic and seafood export trade disruptions over the review period, exports fell from \$768 million in 2019-20 to only \$395 million in 2022-23.

In the same period, Hong Kong grew from \$199 million in 2019-20 to \$226 million in 2022-23, partly due to diversion in lobster exports from the mainland. This factor also contributed to an increase in trade with the USA (\$54 million to \$113 million), and especially Taiwan (\$33 million to \$108 million). Exports

to Japan fell from \$197 million in 2019-20 to \$146 million in 2022-23. See Table 3 and Chart 2 below for more detail.

| Table 2: Australian seafood exports top five destinations (A\$ million) Source: Australian Bureau of Statistics | | | | | | |
|--|-----|-----|-----|-----|--|--|
| Market 2019-20 2020-21 2021-22 2022-23 | | | | | | |
| Mainland China | 768 | 361 | 328 | 395 | | |
| Hong Kong | 199 | 225 | 232 | 226 | | |
| Japan 197 177 175 146 | | | | | | |
| USA 54 102 93 113 | | | | | | |
| Taiwan | 33 | 57 | 84 | 108 | | |

Chart 2: Top five destinations of Australian seafood exports (source ABS data)



Rock lobster: Covid-19 and the China market export disruption

In the years after entry into force of the China-Australia Free Trade Agreement (ChAFTA) in 2016, rock lobster exports to China grew from around \$25 million to a peak of \$754 million in 2018-19³.

With the outbreak of the Covid-19 pandemic in late 2019, Chinese authorities took strict measures to slow the spread of the disease, including the effective closure of the food service industry, where most demand for Australian rock lobster originates. According to Western Rock Lobster Limited, "there was an extraordinary reduction in the demand for high-value seafood such as live Australian rock lobster

(during what would normally be a high-demand period). Imports of western rock lobster and many other premium seafoods had effectively ceased by the final week of January 2020.⁴"

In late 2020, the General Administration of Customs China notified Australian officials of a detection of cadmium above the Chinese maximum residue limit in lobster exported to China, and requested an investigation by the Department of Agriculture, Water and the Environment. Chinese authorities cancelled the Australian rock lobster import quota and associated licenses, effectively ending all live exports in November 2020.

STAG has worked closely with the rock lobster export community and government to coordinate industry responses and restore trade as swiftly as possible. This issue remains the top whole-of-industry priority for the Seafood Trade Agenda and Action Plan 2023-25.

At the time of the trade disruption, China accounted for 91 percent of all Australian rock lobster exports⁵. In 2022, the figure was at 4 percent (frozen rock lobster exports are still permitted into China), and most exports went to Hong Kong (\$130m), Taiwan (\$103m), Vietnam (\$35m), USA (\$27m), and Thailand (\$23m)⁶.

Industry and government have made significant efforts to diversify markets following the disruption. Despite these efforts, exports have been unable to recover value to pre-disruption levels, even though production volumes have remained relatively stable over the period of the ban. Prices in regional export markets are driven by mainland Chinese demand, and Australian rock lobster values have decreased markedly.

According to ABARES, export unit values declined significantly following the onset of the Covid-19 pandemic and closure of the mainland China market, from an average of \$83 per kilogram in 2018–19 to an average of \$43 per kilogram in 2022–23, resulting in rock lobster beach prices falling to the lowest point since 2004–05.

Industry reports large disparity between beach prices in Australia and New Zealand for Southern Rock Lobster, with the difference ranging between \$49 and \$71 per kilogram. Recent prices are shown in the table below:

Table 3: 16-17 September 2023 Southern Rock Lobster beach price (per kilogram) comparison⁷

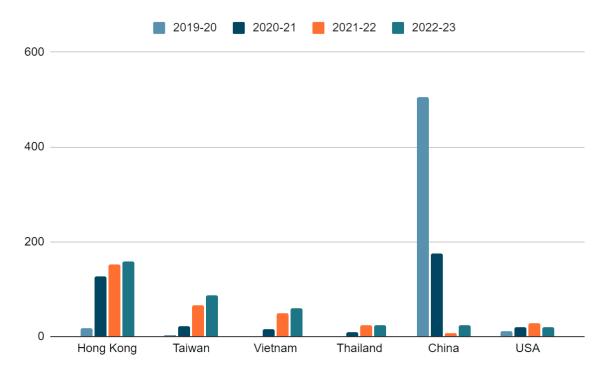
| | South Australia | New Zealand | New Zealand | Difference |
|--------|-----------------|-------------|-------------|------------|
| Grades | \$A | \$NZ | \$A | \$A |
| | | | | |
| AA | | 117 | 107 | |
| Α | 56 | 117 | 107 | -51 |
| В | 58 | 117 | 107 | -49 |
| С | 58 | 120 | 110 | -52 |
| D | 59 | 140 | 128 | -69 |
| E- | 57 | 140 | 128 | -71 |
| E+ | 50 | 120 | 110 | -60 |
| F | 48 | 120 | 110 | -62 |

Rock Lobster

Hong Kong (\$158 million), Taiwan (\$87 million), Vietnam (\$60 million), Thailand (\$25 million), China³ (\$25 million) and the USA (\$19 million) accounted for 91 percent of Australian total rock lobster export value (\$412 million) in 20220-23 (see Table 4 and Chart 3 below). In 2020, prior to the ban, China alone purchased 91 percent of rock lobster exports by value.

| Table 4: Top six destinations of Australian rock lobster exports (A\$ million) Source: Australian Bureau of Statistics | | | | | | |
|---|----------------------|---------|---------|---------|--|--|
| Source: Australian | Bureau or Statistics | T | T | Г | | |
| Market | 2019-20 | 2020-21 | 2021-22 | 2022-23 | | |
| Hong Kong | 17 | 128 | 153 | 158 | | |
| Taiwan | 4 | 22 | 66 | 87 | | |
| Vietnam | 0 | 16 | 50 | 60 | | |
| Thailand | 0 | 9 | 24 | 25 | | |
| Mainland China | 505 | 175 | 7 | 25 | | |
| USA | 11 | 19 | 29 | 19 | | |

Chart 3: Top six destinations of Australian rock lobster exports (Source: ABS data)



Apart from the shift towards non-mainland markets from 2019-20, another notable feature of rock lobster exports has been the resurgence in frozen product formats. Frozen rock lobster exports tripled

from \$19 million in 2019-20 (3.5 percent of total rock lobster exports) to \$59 million in 2022-23 (14 percent of total rock lobster exports) (see chart 4 below). This shift is attributed mostly to mainland China's ban on live imports, forcing producers to consider alternative formats, as well as alternative markets. China and the USA were the main destinations for frozen products in 2022-23, accounting for 71 percent of all frozen exports.

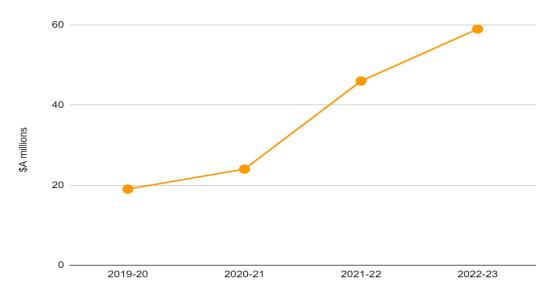


Chart 4: Exports of frozen rock lobster to all destinations (source ABS data)

Abalone

The value of Australian abalone exports grew modestly across all major markets between 2019-20 and 2022-23 (See Table 5 and Chart 5 below). During Covid-19, abalone exports to China and the USA grew, while other markets saw lower values.

The top four Asian destinations combined (mainland China, Hong Kong, Singapore and Japan) at \$133 million) accounted for 85 percent of Australian total abalone exports (\$156 million) in 2022-23.

| Table 5: Top six destinations of Australian abalone exports (A\$ million) | | | | | | | |
|---|---|---------|---------|---------|--|--|--|
| Source: Australian | Source: Australian Bureau of Statistics | | | | | | |
| Market | 2019-20 | 2020-21 | 2021-22 | 2022-23 | | | |
| Mainland China | 62 | 75 | 70 | 64 | | | |
| Hong Kong | 32 | 29 | 33 | 33 | | | |
| Singapore | 21 | 15 | 17 | 23 | | | |
| Japan | 12 | 8 | 9 | 13 | | | |
| USA | 11 | 14 | 16 | 10 | | | |
| Vietnam | 1 | 2 | 2 | 5 | | | |

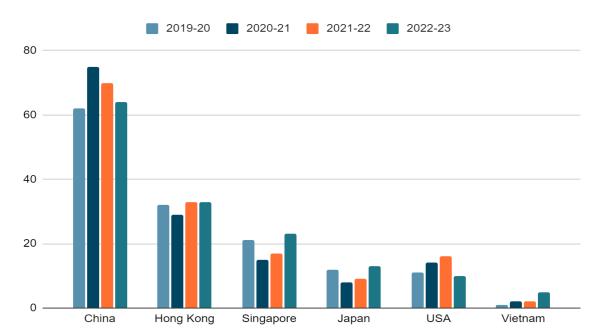


Chart 5: Top six destinations of Australian abalone exports (Source: ABS data)

Growth Trends

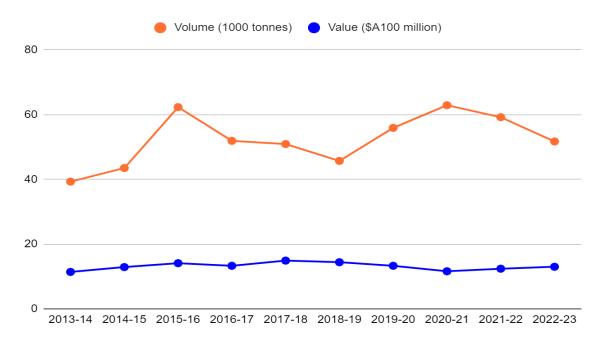
While there have been fluctuations in the total volume and value of Australian seafood exports over the past 10 years, the overall trend is positive growth with volume increasing by around 32 percent and value increasing by around 14 percent. (See Table 6 and Chart 6). The consistent growth in value, despite yearly fluctuations, underscores the resilience and adaptability of the seafood export industry, maintaining its market value even in the face of varying quantities exported. For example, despite a large drop in the value of exported rock lobster since 2020-21, strong growth in salmon exports over the same period has helped to offset declining export values for other species, including lobster.

| Table 6: Total volume and value of Australian seafood exports in ten years | | | |
|--|----------------------|------------------------|--|
| Source: ABS data | | | |
| Period | Volume (1000 tonnes) | Value (A\$100 million) | |
| 2013-14 | 39.3 | 11.4 | |
| 2014-15 | 43.5 | 12.9 | |
| 2015-16 | 62.3 | 14.1 | |
| 2016-17 | 51.9 | 13.3 | |
| 2017-18 | 50.9 | 14.9 | |

| 2018-19 | 45.7 | 14.4 |
|---------|------|------|
| 2019-20 | 55.9 | 13.3 |
| 2020-21 | 62.9 | 11.6 |
| 2021-22 | 59.2 | 12.4 |
| 2022-23 | 51.7 | 13 |

Chart 6: Total volume and value of Australia's seafood exports over the last ten years

(Source: ABS data)



Over the entire period, certain years stand out due to their significant growth or decline. The year 2015-16 was particularly remarkable, experiencing a substantial 43.2 percent growth in volume, marking it as a booming year for seafood exports in terms of quantity. However, this increase in volume was not mirrored in value, which grew by a more modest 9.3 percent. Conversely, the year 2020-21 presented challenges, with the steepest decline in voume at -12.8 percent, influenced by global events such as the Covid-19 pandemic and China market closure to live lobster, which severely affected prices and demand.

Growth forecast

ABARES anticipates the export value of Australian seafood (including other marine aquaculture products, such as pearls) will rise by 7 percent to \$1.47 billion in 2023-24⁴. However, over the medium term, from 2023–24 to 2027–28, the export value of fisheries and aquaculture products is projected to decrease in real terms at an annual rate of 0.7%, settling at \$1.37 billion by 2027–28. Subdued economic growth in key markets, combined with a high inflationary environment, is projected to dampen seafood demand over this period.

ABARES expects the value of rock lobster exports to remain low at around \$340 million out to 2027-28, based on current market conditions. However there is a significant caveat to the analysis: "the resumption of rock lobster exports to China is a key uncertainty for the projections in this outlook (Wright & Gu 2023). Adding to this uncertainty is the paucity of data on how rock lobster demand in China has been affected by the recent relaxation of constraints on domestic and international travel. If rock lobster demand in China does rebound over the medium term and Australia is able to resume exports at premium prices the value of production and exports will be higher than projected."⁵

Despite growth in recent years, the value of abalone exports is projected to decline modestly over the medium term to \$154 million by 2027–28. The emphasis on diversifying into new markets such as Vietnam, Canada, and the Middle East has been a significant trend in the past 10 years.

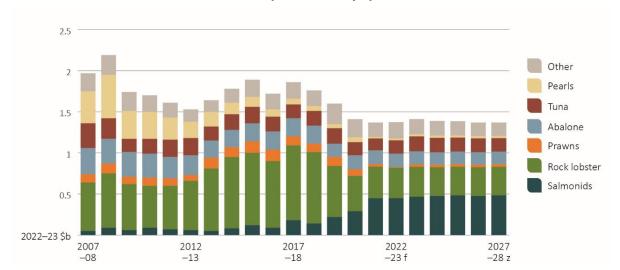


Chart 7: Forecast Australian seafood export value by species

Source: ABARES data (2023)

Global economic growth and inflationary trends present significant challenges to Australian seafood export growth over the forecast period. Exporters also face a number of formal and informal barriers to trade that have had a significant impact, most importantly the loss of the China market for live lobsters.

Key trade agreements

The following multilateral and bilateral trade agreements are relevant to the Australian Seafood trade Agenda 2024-26. One of the priorities is to monitor these agreements and any others that emerge and where relevant prepare coherent and cohesive seafood industry perspectives.

BILATERAL AGREEMENTS

China

ChAFTA has had an immediate impact in the volume and value of seafood exports that are sent to mainland China, particularly for Rock Lobster and Abalone exporters. Resolution of current market access difficulties is a priority. Once trade is restored, monitoring incidents and resolving them quickly is a high priority.

Japan

JAEPA has not had a significant impact on the volume and value of seafood exports generally. While there are niche markets being pursued and opportunities exist for new market development particularly for currently under-utilised undervalued seafood species, historical major exports of Lobster and Abalone have continued to decline. A watching brief will be maintained.

Korea

High tariffs remain for export of some abalone product forms to South Korea. The STAG will continue to liaise with government for opportunities to readdress the tariff for abalone and other species, for example through Korea's proposed CPTPP accession processes.

Singapore

As Singapore is an important destination for Australian abalone a watching brief will be maintained. The issue of substitute species from other countries remains a problem.

Hong Kong

Hong Kong is an important market for many Australian seafood sectors. There are no tariff barriers but there is a potential for non-tariff issues to emerge.

EU

The EU market has high potential for some species and the Australian seafood export sector supports government efforts to negotiate a favourable FTA, seeking immediate elimination of tariffs for all seafood products. A brief will also have to be maintained on NTMs that may restrict entry of Australian seafood products.

UK

While the UK FTA eliminates most seafood tariffs, it is not an important market for exporters.

India

An interim or 'first-stage' FTA is in force with India that eliminates tariffs for some products, including live lobster. However, Australia has no negotiated access protocol for live lobster, and so the product cannot be exported currently. Long phase-outs are in place for other products, such as frozen lobster. The second stage of the agreement would ideally accelerate phase-out periods and include negotiation of a live lobster protocol.

GCC

The Gulf Cooperation Council economies are not major markets for Australian seafood, however there are high-value niche opportunities for lobster and abalone in the UAE. It is expected that the GCC FTA, when concluded, will eliminate all seafood tariffs. Halal issues in the GCC can sometimes act as a barrier to trade, especially for farmed product. STAG will maintain a watch on these kinds of regulations.

MULTILATERAL AGREEMENTS

The Australian seafood export sector supports government efforts to achieve positive outcomes from multilateral agreements. The following agreements are currently under negotiation and/or implementation. The STAG will maintain a watching brief and provide industry information as needed by government negotiators.

Comprehensive and Progressive Agreement for Trans-Pacific Partnership

The CPTPP is a free trade agreement between Australia, Brunei Darussalam, Canada, Chile, Japan, Malaysia, Mexico, Peru, New Zealand, Singapore and Vietnam. It was signed in March 2018 and entered into force in Australia on December 2018. Korea's expected application for membership of the CPTPP agreement is another opportunity to target Korea's abalone tariffs.

Regional Comprehensive Economic Partnership

RCEP entered into force on January 1, 2022, after it was signed on November 15, 2020 by the 15 participating countries, which include the 10 ASEAN member states (Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam) and Australia, China, Japan, New Zealand, and South Korea.

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 6: |
| Brief on adding Long-spined Sea Urchin to the List of |
| Approved Species for Export to China from Australia |
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Purpose

This brief provides background on the status of market access to China for Australian sea urchin products, outlines the process and current efforts to secure access for additional species, and recommends a course of action to support and accelerate those efforts.

Background - status of China market access for sea urchin

To be eligible for export to China, a species must be on the <u>approved species list</u> for the source country. Every country has a specific list. Countries can request the General Administration of Customs China (GACC) to include more species.

In 2018, China introduced a new approved species list for Australia, which omitted several key Australian export species previously traded with China. Australian sea urchins in any format are not on that list.

Since the publication of the new list, Australia has tried to have species added. Initially, China advised that any species with a trade history could be added to the list by providing proof of trade. There have been no additions for quite some time.

In 2019, China advised that they required a documented risk dossier to be submitted with any request for additions to the list. They also advised that there were limits on the number of species that they would consider at any one time. This required the development of a prioritised list. An industry-wide consultation was conducted in late 2019, culminating in an industry meeting in Melbourne. At that meeting, industry and government agreed on the priority species to be submitted to GACC for consideration in four stages.





As you know, GACC recently transitioned to a 13-digit product classification system under the new China Imported Food Enterprise Registration (CIFER) system. DAFF used this opportunity to test if the approved species list was still being used by GACC. STAG understands some attempts were made to add some unlisted species through that CIFER registration process but were not successful.

In the absence of any advice to the contrary, we are assuming that any new request to add a species to the approved list will need to be accompanied by a complete risk dossier (required by China) and an economic business case (required by DAFF for resourcing decisions). A copy of the risk dossier used in 2020 is attached.

Opportunity

The lack of progress in expanding the list since 2020 reflects broader difficulties in the trade relationship. However, there are signs that the situation may be improving. Media reports that Prime Minister Albanese might visit China in November this year, which would be a major breakthrough and opportunity to advance market access. The Prime Minister will also reportedly meet with President Xi Jinping in the margins of the upcoming G20 Summit in India.

Australian officials have advised that discussions with Chinese counterparts are underway on various matters. DAFF intends to 'test the waters' on the previous species list requests by resubmitting with GACC in the coming weeks. This is in progress, and DAFF has advised us that sea urchin (all species and product formats) is being included in the request along with everything else. STAG is in direct contact with the department on this issue and will monitor progress.

Should GACC engage on the list, Chinese authorities will likely require technical information, particularly around food safety and environmental risk assessment. This may necessitate, for example, a heavy metal testing program. The industry **should start preparing this information (using the attached risk dossier) in collaboration with DAFF and be ready to submit it if needed.** The STAG can help facilitate this process. However, additional investment will be needed to prepare and translate the dossier and supporting information.

Separate from the above requirement for detailed technical information, DAFF has a market access prioritisation process, which requires a solid economic case before government resources are committed to market access efforts. **Industry needs to provide strong evidence of the commercial opportunity to support the case for expanded access.**

Next steps

The STAG will **continue to monitor developments** on the China species list in regular liaison with the government and provide regular updates to ACA.



In the meantime, the STAG recommends that we work with the industry to develop a project that includes:

- researching the technical risks (food safety and sustainability) that China will likely be interested in, identifying where the gaps are, and working with Safefish and DAFF to fill any of the information gaps.
- creating an economic benefits case and a technical risk dossier to provide evidence to China that Australian sea urchin meets their food safety and environmental sustainability standards and
- documenting the economic benefits of establishing China market access to demonstrate to Australian officials that a market access request is likely to succeed and will lead to real commercial outcomes.
- **building connections with Chinese counterparts**, including importers and industry bodies, to develop demand-side support for opening trade. This could commence as part of the China International Import Exhibition (CIIE) in November this year and will require continued long-term investment to build and maintain those relationships.

More information

If you would like to discuss this further or have additional questions, please do not hesitate to contact us.

Contacts:

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Andrew Robertson Mobile +61449859838

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 7: |
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| China Engagament Dlan |
| China Engagement Plan |
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Lobster Working Group China Engagement Plan

STAG and SIA have developed a series of possible activities for discussion ahead of the LWG meeting on Thursday 22nd at 4pm (AEDT). These can be standalone or mixed and matched. These activities can be delivered between late March and July 2024. Various levels of investment and time has been considered to provide an array of activity options for the LWG to consider.

It is important to stress to the LWG that engagement with Chinese organisations such as CIQA and CAPPMA, while important over the long term for industry resilience, is **not expected to lead to a market access breakthrough in the short term**. Building trust and cooperation in China takes time. These relationships should be approached from the perspective of a long-term mutually-beneficial partnership, not an immediate avenue to pursue a resolution of access issues.

Also, in considering the activites presented the LWG should consider what level of government involvement is appropriate. Industry ownership is key to the long term viability of any new relationships.

PROPOSED ACTIVITIES

Activity 1: Jayne Gallagher's existing China program

Jayne Gallagher will visit China in her capacity as President-elect of the International Association of Fish Inspectors in late March. Her program includes interactions with representatives of the China Entry-Exit Customs and Quarantine Association (CIQA).

This presents an early opportunity to establish contact with CIQA in a low-key manner with an eye to building more formalised and regular association-level relations in due course, including by laying the groundwork for a future industry delegation. For instance, Jayne has an opportunity to hand deliver a formal letter of introduction from SIA, establishing official contact between the parties.

The Shanghai Fisheries Trade Association, convenor of the Shanghai seafood trade show in August, would be another useful contact to make during this visit.



Other associations in China can be included as part of this activity, an assessment by the LWG will need to be discussed and agreed as to which associations would provide value. (see original attachment).

<u>INVESTMENT</u>: Honey and Fox will meet all additional costs not covered and time will be provided as an in-kind contribution.

Activity 2: SIA leading an Industry delegation to China

As part of the need to extend engagement and relationships to a broader group, an Australian delegation would travel to China and make contact with key organisations.

This would allow for industry to have direct ownership of the relationships from an early stage and also send a message to the Chinese that building long-term partnerships is important across industry.

The makeup of the delegation, the timing, the specific program, and the targeted in-country organisations are to be determined by the LWG. SafeFish could be included in this program from the perspective of establishing technical links.

This delegation could visit China as soon as April.

<u>INVESTMENT:</u> Each delegate would cover their own cost.

Activity 3: SIA engaging Australia-based Chinese Government representatives

An invitation from SIA can be issued to the Chinese Consulate-General in a state capital city to visit a domestic lobster processor or fisher. This activity could follow the model set by the official visit of the Perth Consul General to a GFC facility in January 2023.

An invitation to the Chinese Ambassador to Australia, Xiao Qian can also be issued. SIA made engagement with the Embassy of the People's Republic of China during the Australia China Business Council networking event in October 2023.

DFAT/DAFF would be informed of this activity and advice sought.

<u>INVESTMENT</u>: Each delegate would cover their own domestic travel and assist with hosting a site visit.

Activity 4: Industry delegation to Canberra



A delegation of LWG/industry representatives would visit Canberra to make in-person representations to parliamentarians and seek briefings with DAFF and DFAT officials.

The makeup of the delegation, the timing and program are to be determined by the LWG.

There is an existing SIA plan to visit Canberra for the Parliamentary Friends of Seafood event and associated calls on ministers on 1-2 July. Details TBC.

<u>INVESTMENT:</u> Delegations members would cover their own costs to attend.

Activity 5: Engagement with the Ministers

SIA to issue correspondance to the Trade Minister Farrell to keep the issue of lobster trade top of mind. To ensure that messaging is extended to Foreign Minister, Prime Minister and Minster for Agriculture as required.

SIA will start off by communicating with the Minister's office in advance of the Trade Minister's talks with China's Commerce Minister, set for 26 February.

INVESTMENT: No cost.

Further Background

For planning purposes, SIA/STAG would be grateful if members could provide any information around the following questions:

- Are there State engagement plans the group should be aware of?
- Do the State associations have any prior contacts in China they would like to add to the list or provide background on?

Indicative List of Official Australia-China Interactions in 2024

To assist in planning throughout the year, and to flag potential high-level opportunities for engagement with Chinese officials on the lobster issue, we have prepared the following list of known or expected, but unconfirmed, events:

 Trade Minister Farrell will meet Commerce Minister Wang at WTO MC13 in Abu Dhabi (see here) Officials briefings to be provided to DFAT on live lobster cadmium and TRL issues before the WTO event - <u>Timing</u>: 24-25 February



- Premier Li (or President Xi) is expected to visit Australia in the second half of 2024 and there is a reasonable suggestion this could occur to coincide with significant anniversaries in the bilateral relationship, which often guides the timing of leader-level visits. November marks the 10th anniversary of the establishment of the Australia-China Comprehensive Strategic Partnership, and a decade since President Xi addressed the Australian Parliament and the ChAFTA negotiations concluded. Timing: possibly November
- Commerce Minister Wang (or Foreign Minister Wang) is likely to come prior to the leader-level visit to prepare the way for any significant 'announceables'. Additionally, the Australia-China Foreign and Strategic Dialogue, which was revived in 2022 and held in Beijing, should occur in Australia this year and necessitate a visit by either the Chinese Commerce of Foreign Minister, or both. - <u>Timing</u>: before leader visit
- The Strategic Economic Dialogue was reinstated as part of the outcomes from PM
 Albanese's visit last November. This meeting involves the Australian Treasurer and Trade
 Minister meeting with the Chairman of China's National Development and Reform
 Commission. There is no indication of where or when this event might be held in 2024. Timing: unknown 2024
- Officials will commence work on a review of the Australia-China FTA this year. This will
 involve a series of working-level negotiations with China over the course of the second
 half of the year, with opportunities to discuss all aspects of the trade relationship. <u>Timing:</u>
 second half of 2024

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| Attachment 8: |
| DAFF Market Access Priority Setting Process |
| Business Rules |
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Handbook of Business Rules: Seafood Market Access Prioritisation

17 May 2022

Seafood Market Access Working Group



From DAFF image gallery at https://dawr.imagegallery.me/site/welcome.me

Purpose

The seafood industry, represented by the Chair of the Seafood Export Consultative Committee (SECC), Seafood Trade Advisory Group (STAG), SafeFish and Seafood Industry Australia (SIA), and the Department of Agriculture, Fisheries and Forestry (the department), are collaborating to develop and implement a process of prioritising seafood related market access work. Collectively they form the Seafood Market Access Working Group (SMAWG).

SMAWG provides the strategic forum for consultation between industry and the department in relation to market access priorities for the export of fish and fish products. Market access covers maintenance of markets with current trading partners, access to new markets and restoring market access where it has been lost.

The intention of this prioritisation process is to present a transparent approach to setting the department's work priorities. It will allow the seafood industry to ensure that the department has a clear understanding of industry priorities so that the department's resources are directed efficiently and effectively.

It will rely on joint engagement between the seafood industry and the department. Both the seafood industry and the department appreciate this opportunity to influence the department's work program. However, items to be included on the work program shall be based on the department's assessment of its capacity including staff availability, other resourcing and likelihood of success.

Version history

| Version | Date |
|---------|-------------|
| 1 | 17 May 2022 |
| | |
| | |

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1 Market access prioritisation framework

The seafood market access prioritisation framework is summarised by the following diagram:



Industry and government resources for market access are allocated in priority order from Category 1 through to Category 4.

1.1 CATEGORY 1 - URGENT

Market access issues that have a direct and immediate commercial impact on the industry. Examples include wide spread market access disruptions, disease outbreaks, and changes in importing country requirements that impact existing trade.

1.2 CATEGORY 2 – PROTECT

Market access issues that require the department's action to support maintaining/safeguarding market access and the integrity of the export system. For example: foreign reviews of Australia's export certification system, completion of questionnaire responses for markets with existing access, responding to audit reports, closing out audit findings, engaging in equivalence negotiations, drafting agreements and MOUs, amending export health certificates, responding to regulatory changes in existing export markets and resolution of technical issues to ensure market access continues.

1.3 CATEGORY 3 – UNLOCK

Market access issues that have a focus on growing trade. This includes new commodity access or using agreements that would expand trade. Examples include developing certification for new market access requests, new establishment listings and realising commitments under government-to-government arrangements.

1.4 CATEGORY 4 – SLOW BURN

Market access issues that require a long-term focus (varying from months to years) to achieve outcomes. Examples includes –negotiations of free trade agreements, international standards development (Codex Alimentarius and OIE).

1.5 Routine work

Those well established and ongoing market access activities that form the routine work of the department will not be entered in the prioritisation database. Instead, to give recognition of these activities, these will be entered in separately. These activities include facilitating detained consignments, annual reporting, general maintenance of Micor and responding to exporter enquiries.

2 Scope

2.1 Scope of the framework

The scope of this framework is limited to market access work for fish and fish products for human consumption. The terms 'fish' and 'fish product' are defined in the *Export Control Act 2020* and *Export Control (Fish and Fish Products) Rules 2021*, respectively. The word 'fish' is defined as aquatic vertebrates and aquatic invertebrates but does not include mammals or birds, and the term 'fish product' is defined as a product containing fish.

3 Administration and governance

3.1 Composition of Working Group

Industry via the Seafood Export Consultative Committee (SECC) has endorsed the creation of a working group to facilitate the ongoing prioritisation process.

The Seafood Market Access Working Group (SMAWG) consists of the department and a range of industry representatives who might consider industry wide issues prior to discussing prioritisation of market access requests.

The current membership of SMAWG is outlined below:

- Department of Agriculture, Fisheries and Forestry
- SECC Chair
- Seafood Industry Australia (SIA)
- Seafood Trade Advisory Group (STAG)
- SafeFish

SECC is the principal consultative committee for the department to consult with the Australian seafood export industry on technical and administrative matters in relation to the export of fish and fish products. The aim of SECC is to provide an effective and ongoing forum for formal liaison and consultation between the department and relevant stakeholders in the industry. SECC will consider and provide advice to the department on matters which are relevant to the industry.

SIA is the national peak-body representing the Australian seafood industry as a whole. SIA has members from the wild catch, aquaculture and post-harvest sectors of the Australian seafood industry.

STAG activities include consulting with seafood exporters and industry associations to agree on trade and market access priorities, providing a market intelligence service to Australian seafood exporters and working with key research organisations. STAG is partnered with the Abalone Council Australia Ltd, Southern Rocklobster Ltd, the Australian Abalone Growers Association, Western Rock Lobster, the Fisheries and Research and Development Council and Safefish.

SafeFish provides technical advice to support Australia's seafood trade and market access negotiations and helps to resolve barriers to trade. SafeFish is primarily funded by the Fisheries Research & Development Corporation (FRDC) and is the leading platform in their program for dealing with food safety and trade and market access issues affecting Australian seafood.

3.1.1 Delegation of role

The Director of the Food and Organics Section, Export Standards Branch, is the inaugural Chair of SMAWG. Both the Chair and membership of the SMAWG are subject to review no less than every 2 years.

3.1.2 The Prioritisation Database

The department has established a prioritisation database which contains all market access work being considered for prioritisation. To facilitate real-time updates, a prioritisation database has been established on GovTEAMS:

https://users.govteams.gov.au/Community/F6F8BAF8-BC06-4837-8BCC-0025170CB49C

The department will be the administrator of the prioritisation database and provide user access on the following levels:

- Read only All members and other officers at the discretion of SMAWG (e.g. other government agencies)
- Read/Edit DAFF officers

Should members of SMAWG change over time, new members should send a user access request via email to Exportstandards@agriculture.gov.au.

3.1.3 Roles and responsibilities of users of the prioritisation database Working Group members:

- 1. Undertake quarterly reviews of the prioritisation database and make modifications as required.
- 2. Consider and log new requests on a quarterly basis, or more frequently as required via consultation with DAFF staff at ExportStandards@agriculture.gov.au
- 3. Assist the department in preparing a standing report to SECC meetings of current and completed market access priorities.

3.1.4 Confidentiality

Users agree to take measures to safeguard the confidentiality of the market access prioritisation process. In practice, this would mean to not share or distribute any of the information listed on the prioritisation database without the prior written consent of the department. Login details must be kept securely for the sole knowledge and use of the person they are assigned to.

3.1.5 Conflict of interest

For the purposes of these Business Rules, a conflict of interest refers to a situation where an outside interest influences, has the potential to, or could be seen to influence the treatment of a market access priority.

Working group members will take action to ensure that they inform the department of this conflict prior to any consideration of the priority item.

Working group members will comply with the 'Conflict of Interest' and related policies of their respective organisations.

3.1.6 Notifications

Users will be able to subscribe to regular automated push notifications alerting them to changes in the prioritisation database. Users can nominate the type of change which they would like to be notified of and the frequency of notifications. An outline of how to setup notification alerts is included on the Help page in the portal.

3.1.7 Priority requests

The market access prioritisation framework is intended to assist government and industry to work together to prioritise available resources to achieve the best market access outcomes. It is the role of the Working Group to oversee priority assessment in a timely fashion. However, the department is the final decision maker on the prioritisation of market access requests.

The department has included *Appendix A: Market Access National Prioritisation Principles and Criteria* to assist the review process particularly where there is a difference of opinion on a market access request.

3.1.8 Commercial-in-confidence

The department and industry recognise that there may be a requirement for a market access priority request to remain commercial-in-confidence. These work items are not for inclusion in this market access prioritisation tool.

3.1.9 Operation of the Working Group

The Working Group will meet quarterly to review the prioritisation database, consider and log new requests and make modifications to existing priorities as required.

The Working Group will meet via virtual or physical means, at the behest of the department. The Secretariat will be administered by DAFF. An agenda and meeting summary will be prepared for meetings.

The Working Group may request an out of session meeting where an urgent new market access request needs to be reviewed and prioritised accordingly.

3.1.10 Report on priorities

A standing report will be provided to SECC by the department on the market access prioritisation list and any major market access developments.

3.1.11 Updating process and timeframes

The report cut-off time for inclusion of items from industry will be four weeks prior to the scheduled SECC meeting date. This timeframe will allow for SMAWG review and confirmation of all new and updated market access priorities.

3.1.12 Review of priority achievements

On completion of a market access priority, the Working Group may consider a six- or 12-month review of the trade outcomes of the achievement in terms of value, volume exported and adoption by exporters. This review enables a transparent approach to quantify success and identify opportunities to better utilise market access gains. Reviews of achievements will be initiated by the Secretariat with input and support from Working Group Members.

4 Assigning priorities

4.1.1 Creating new requests

New market access priorities may arise in varied ways. For instance, they may be triggered by a change in importing country requirements, changes in Australian export requirements, a change in animal health status, or a new market opportunity.

4.1.2 Categories 1 (Urgent), 2 (Protect) and 4 (Slow Burn)

The market access priorities under these categories are typically well-recognised with minimal need for formal deliberation. As such, the process to update the prioritisation database is:

- 1. Who Working group members, with implementation by DAFF officers
- 2. When Quarterly, or more frequently as the priority arises
- 3. How On advice from Working Group members, DAFF officers may update the prioritisation database; an electronic log will automatically be created

The process by which to add and edit priorities is outlined in the demonstration video on the Help page of the portal.

4.1.3 Category 3 (Unlock)

The largest volume of requests will relate to unlocking new/improved market access - Category 3. The process for adding or editing these has been further expanded to include a number of additional steps:

- 1. Where a new request is initiated by an exporter, industry organisation or DAFF, an electronic form will be submitted to DAFF providing an overview of the issue and preliminary data.
- 2. Scoring of the new market access request against four key criteria:
 - I. Probability of success within the short-to-medium term
 - II. DAFF resources required
 - III. Industry resources required
 - IV. Industry impact of request (dollar value of trade if successful).

The following scoring matrix is the responsibility of the lead DAFF team to complete for each priority and prior to confirmation by the Working Group.

Ultimately, three measures are used to assess whether a priority should be pursued:

- 1. The probability of a positive outcome
- 2. The resources required to address the issue (government and industry)
- 3. The impact of the issue on trade

For the purposes of the prioritisation database, scoring is based on the best estimates available at the time the request is lodged. Evidentiary support of estimate figures is encouraged, but not mandatory.

4.2 Scoring Matrix

| Probability of positive outcome (1-10) Assessment based on adoption of most suitable strategy / approach (see Q's below) | | Government Resources (1-10) Examples below for guidance but all issues will require unique approach | | Industry Resources (1-10) Examples below for guidance but all issues will require unique approach | |
|--|---|--|--|--|--|
| 1 | 10% – remote chance of positive outcome | 1 | Direct Competent Authority (CA) to CA contact | 1 | Monitor and liaise with commercial operators |
| 2 | 20% | 2 | DAFF Ag/Minister Counsellor contact required | 2 | In-market intelligence gathering and networking |
| 3 | 30% | 3 | DFAT/HOM tasking required | 3 | Co-ordination of industry position |
| 4 | 40% | 4 | Certificate revisions (+/- software promote) required | 4 | Development of industry submissions +/- in-market representation |
| 5 | 50% – 50:50 chance of success | 5 | Protocol negotiation; may require submission/s | 5 | Explore R&D solutions <\$xk; <12-month duration |
| 6 | 60% | 6 | Moderate systems changes | 6 | Implement moderate systems changes |
| 7 | 70% | 7 | Implementation of a new verification/segregation system | 7 | Implementation of a new verification / segregation system |
| 8 | 80% | 8 | Hosting a desktop/physical audit | 8 | Explore R&D solutions >\$xk; >12-month duration |
| 9 | 90% | 9 | DAFF/DFAT Canberra staff travel; major system or regulatory change | 9 | Substantial industry delegation +/- >\$xk spend |
| 10 | 100% – success is basically guaranteed | 10 | Direct intervention required by Ministerial level or above | 10 | Introduction of new tech or process requiring industry/supply chain adoption +/- regulatory change |

Impact on industry / size of issue

If assessment of trade value exists within prior research, use it as guidance. If prior assessment does not exist use best judgement or alternative method to estimate approximate impact range.

| Impact score | 1 | 2 | 3 | 4 | 5 |
|---------------|--------|---------|----------|-----------|---------|
| Value (\$AUD) | <\$100 | \$1-10M | \$10-50M | \$50-100M | >\$100M |

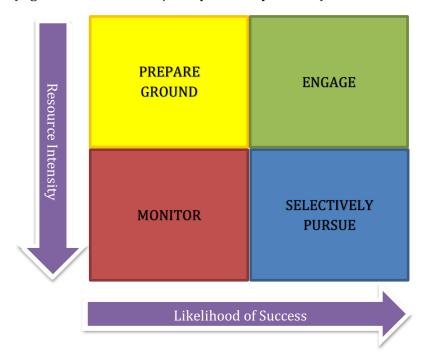
4.3 Considerations

In assessing the probability of positive outcome, consider the use of scoring matrix in Section 4.2 as well as the following questions:

- Do we have strong G2G (competent authority) relationships we can leverage?
- Can Australia make changes within existing arrangements?
- Are there existing or upcoming bilateral negotiations / forums we can leverage to raise this issue?
- Do we have an Ag Counsellor in the market? Does the Ag Counsellor have existing relationships with the necessary people we can leverage?
- Are there broader political considerations to consider?
- Is the proposed change a win-win for both countries?
- Does research exist to, or will it, support our position? Does precedent exist in other markets to support our position and are they the right markets?
- Do these changes require substantial investment or re-allocation of resources by the importing country?
- Are there broader (importing country) government programs that align with our priority? (e.g. bolster food security)
- Does industry have a presence in the market?
- Does industry have MOU or existing forum with importing country industry that we can leverage?
- Does the industry have existing relationships with the necessary people we can leverage?
- Do importers support the proposed changes?

Based on the scores entered, the SharePoint will automatically allocate the market access request to one of four 'classifications':

- I. Engage (low resources needed / high probability success)
- II. Selectively pursue (high resources needed / high probability success)
- III. Prepare Ground (low resources needed / low probability success)
- IV. Monitor (high resources needed / low probability success)



4.3.1 Updating status of priorities (DAFF staff only)

To update the status of a priority, click on the market access request. In the 'Status' category, mark the request as either 'In progress', 'Completed', 'On hold' or 'Not started'.

4.3.2 Deleting records (DAFF staff only)

Restricted to use for data entry errors including duplicate records. If a priority is no longer being pursued or is on-hold, change the status of the item rather than deleting the record. Items may be deleted where there is duplication.

5 Additional features

5.1 Trade data

The SharePoint portal is linked to ABS datasets (updated annually). Click on the country to view trade data relevant to the market.

5.2 Reporting

The SharePoint portal is capable of generating automatic reports on existing and completed market access requests, exported as either an Excel Workbook or CSV file. The Market Access Priorities PPT (<u>link here</u>) is one demonstration of how this data can be displayed.

5.3 Micor linkage

The SharePoint tool has a link to the department's Manual of Importing Country Requirements (Micor). Micor sets out the known requirements that exporters and the department must meet for products and commodities to be accepted for import into specific overseas countries.

5.4 User guide & help resources

A range of user 'how-to' information is to be developed.

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6 Appendix A: Market Access National Prioritisation Principles and Criteria



| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
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| STAG Communications Survey (Full Results) |
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Time Spent: 00:00:07 **IP Address:** 58.178.219.57

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

#2

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 12:24:04 PM Last Modified: Thursday, April 04, 2024 12:28:56 PM

Time Spent: 00:04:51 **IP Address:** 203.6.146.46

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends

New innovation affecting the global seafood market

Global seafood trade issues

Interested

Interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

Alternative protein industry Interested

Pricing information Not interested

Global lobster and abalone production information Interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|---|----------------------------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Not interested |
| Updates on overseas market access and importing country requirements | Interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

Government

How would you best describe your role?

Q15

China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Japan, Korea,

Europe,

Vietnam,

Hong Kong,

Taiwan,

USA,

India,

Singapore,

Malaysia

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q16

What do you see as the biggest challenge for Australian seafood exporters?

politics, competing products

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

sustainability credentials

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

I love the links to international news articles.

#3

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 12:50:20 PM Last Modified: Thursday, April 04, 2024 12:52:40 PM

Time Spent: 00:02:20 **IP Address:** 1.129.28.21

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry Interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Interested |
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the | |

Page 5: Aspiring exporter

next five years?

Q10 Respondent skipped this question Which products are you planning to export (Click all that apply) Q11 Respondent skipped this question The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. Q12 Respondent skipped this question Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? Q13 Respondent skipped this question What do you see as the biggest export opportunity in the next five years? Page 6: Other than exporters Q14 **Fisher** How would you best describe your role? Q15 China, The STAG provides regular market trends and consumer Japan, insight updates for seafood exporters. Please tell us which Korea, export markets are of interest to you. Vietnam, USA, **New Zealand** Q16 What do you see as the biggest challenge for Australian seafood exporters? No china market

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

China

Page 7: Final question

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

#4

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 1:12:54 PM **Last Modified:** Thursday, April 04, 2024 1:27:59 PM

Time Spent: 00:15:05 **IP Address:** 27.252.119.157

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Interested

Alternative protein industry Interested

Pricing information Not interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

I think that regular scans of the production issues would be useful. There is no fish to export if we cannot catch and land fish. Or if we fail to train sufficient skilled catching and processing personnel. Markets are what happens after fish are caught. No fish, no sales.

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

Those issues which materially effect levels of production.

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|---|----------------------------------|
| Which products are you currently exporting (Click all that apply) | |

| Q7 | Respondent skipped this question |
|----|----------------------------------|
| | |

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

| Q8 F | Respondent skipped this question |
|------|----------------------------------|
|------|----------------------------------|

As a current exporter what is the biggest challenge you currently face when exporting your product?

| Q9 | Respondent skipped this question |
|----|----------------------------------|
|----|----------------------------------|

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q10

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

Other (please specify):

How would you best describe your role?

Consultant to catching sector and to a range of seafood industry organisations and agencies.

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

China,

Japan,

Korea,

Europe,

UK,

Middle East,

South America,

Vietnam,

Hong Kong,

Taiwan,

USA,

Canada,

New Zealand,

India,

Singapore,

Malaysia

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Erosion of catching sector opportunities; business compliance costs; offshore wind farms; international marine protection agendas; anti-industry lobbying and possibly a revisiting of indigenous customary rights to sea fisheries

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Toss up between Asian communities in Canada and North America and emerging high-end market in India.

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

No more than I have mentioned. STAG does an excellent job in my view - the regular newsletters get priority in my work schedule. Thy are topical. current and very informative. Thank you

#5

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 2:43:49 PM Last Modified: Thursday, April 04, 2024 2:58:20 PM

Time Spent: 00:14:31 IP Address: 124.47.163.185

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry Interested

Pricing information Interested

Global lobster and abalone production information Interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

more coverage on species other than rock lobster and abalone

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Interested |
|--|------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

no

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|---|----------------------------------|
| Which products are you currently exporting (Click all that apply) | |

Q7 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q8 Respondent skipped this question

As a current exporter what is the biggest challenge you currently face when exporting your product?

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Government

How would you best describe your role?

Q15 Other

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

What do you see as the biggest challenge for Australian seafood exporters?

climate change, increasing costs of production, getting product to market and increasing complexity for market access overseas.

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

difficult to say

Page 7: Final question

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

yes include more information for species other than abalone and rock lobster

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 3:20:12 PM Last Modified: Thursday, April 04, 2024 3:22:08 PM

Time Spent: 00:01:55 **IP Address:** 1.147.98.207

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Interested

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|---|----------------------------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Not interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Q10 Respondent skipped this question Which products are you planning to export (Click all that apply) Q11 Respondent skipped this question The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. Q12 Respondent skipped this question Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? Q13 Respondent skipped this question What do you see as the biggest export opportunity in the next five years? Page 6: Other than exporters Q14 **Fisher** How would you best describe your role? Q15 China The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. Q16 Respondent skipped this question What do you see as the biggest challenge for Australian

Page 7: Final question

What do you see as the biggest export opportunity for

Australian seafood in the next five years?

seafood exporters?

Q17

Respondent skipped this question

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 3:18:57 PM Last Modified: Thursday, April 04, 2024 3:23:27 PM

Time Spent: 00:04:29

IP Address: 110.143.172.240

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Updates on trade negotiations

Updates to Australian seafood trade regulation and exporter requirements

Opportunities to provide input into seafood trade policy and regulation

Notice of upcoming webinars

Updates on overseas market access and importing country

Interested

Interested

Q5

requirements

Are there any other important topics you would like to see included in Seafood Trade Matters?

Respondent skipped this question

Page 4: Current exporter

Q6 Abalone

Which products are you currently exporting (Click all that apply)

Q7 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Japan,

Korea,

Middle East,

Vietnam,

Hong Kong,

Taiwan,

USA,

Singapore

Q8

As a current exporter what is the biggest challenge you currently face when exporting your product?

We only have one country (China) that will pay the price for our product. It is impossible to diversify to other countries because they will not pay the price for the product.

What do you see as the biggest export opportunity in the next five years?

Honestly cant see any.

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16 Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 04, 2024 5:03:42 PM Last Modified: Thursday, April 04, 2024 5:06:24 PM

Time Spent: 00:02:42 **IP Address:** 120.151.231.37

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends

Very interested

New innovation affecting the global seafood market

Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Interested

Alternative protein industry

Not interested

Pricing information Very interested

Global lobster and abalone production information Not interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country | Interested |

Q5

requirements

Are there any other important topics you would like to see included in Seafood Trade Matters?

Respondent skipped this question

Page 4: Current exporter

| Other |
|-------|
| |

Which products are you currently exporting (Click all that apply)

| China, |
|--------|
| |

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Korea,

Middle East,

Vietnam,

Japan,

Hong Kong,

Malaysia,

Taiwan,

New Zealand,

India,

Singapore

As a current exporter what is the biggest challenge you currently face when exporting your product?

DAFF

Q9

What do you see as the biggest export opportunity in the next five years?

India

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

You are doing a good job. Much appreciated

INCOMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, April 05, 2024 11:46:28 AM **Last Modified:** Friday, April 05, 2024 11:46:40 AM

Time Spent: 00:00:11 **IP Address:** 1.145.212.80

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Monday, April 08, 2024 11:14:15 AM **Last Modified:** Monday, April 08, 2024 11:16:13 AM

Time Spent: 00:01:57 **IP Address:** 210.8.96.58

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country | Very interested |

Q5

requirements

Are there any other important topics you would like to see included in Seafood Trade Matters?

Respondent skipped this question

Page 4: Current exporter

Q6 Rock Lobster

Which products are you currently exporting (Click all that apply)

Q7 Japan,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Vietnam,

Hong Kong,

Taiwan,

Singapore

Q8

As a current exporter what is the biggest challenge you currently face when exporting your product?

Cargo space

Australian Trusted Trader delay

Q9

What do you see as the biggest export opportunity in the next five years?

Asia

| Page 5: Aspiring exporter | |
|---|----------------------------------|
| Q10 | Respondent skipped this question |
| Which products are you planning to export (Click all that apply) | |
| Q11 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q12 | Respondent skipped this question |
| Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | |
| Q13 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |
| Page 6: Other than exporters | |
| Q14 | Respondent skipped this question |
| How would you best describe your role? | |
| Q15 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q16 | Respondent skipped this question |
| What do you see as the biggest challenge for Australian seafood exporters? | |

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, April 12, 2024 12:15:03 PM Last Modified: Friday, April 12, 2024 12:16:48 PM

Time Spent: 00:01:45 IP Address: 49.255.19.66

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Global lobster and abalone production information Interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Interested |
|--|------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Interested |

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 | Rock Lobster, |
|--|---------------|
| Which products are you currently exporting (Click all that | Abalone, |
| apply) | Other |
| | |

Q7 Japan,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which

Q8 Respondent skipped this question

As a current exporter what is the biggest challenge you currently face when exporting your product?

export markets are of interest to you.

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

| Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 6: Other than exporters Q14 How would you best describe your role? | Respondent skipped this question |
| Q15 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q16 What do you see as the biggest challenge for Australian seafood exporters? | Respondent skipped this question |
| Q17 | Respondent skipped this question |

Page 7: Final question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Respondent skipped this question

INCOMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, April 12, 2024 7:51:45 PM Last Modified: Friday, April 12, 2024 7:52:07 PM

Time Spent: 00:00:21 **IP Address:** 1.125.17.147

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 11:34:20 AM Last Modified: Wednesday, April 17, 2024 11:38:49 AM

Time Spent: 00:04:28 IP Address: 65.181.22.12

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Interested

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Very interested |
| Updates to Australian seafood trade regulation and exporter requirements | Not interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

Other (please specify):

How would you best describe your role?

Services to fishing

Q15

China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Korea,

Japan,

Hong Kong,

Taiwan,

USA,

Canada,

New Zealand,

Singapore,

Malaysia

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Cohesive brand story

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

China - and some other growing asian markets.

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

The fundamental challenge in Australian seafood IMO, is no fishing companies work together. They see trading as a zero sum game and they have to out-compete their competitors. Life could be easier and more profitable long term if worked together.

INCOMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 11:53:28 AM Last Modified: Wednesday, April 17, 2024 11:53:36 AM

Time Spent: 00:00:08 **IP Address:** 202.153.221.89

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 12:02:16 PM Last Modified: Wednesday, April 17, 2024 12:12:17 PM

Time Spent: 00:10:01 **IP Address:** 144.134.25.162

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

Alternative protein industry Very interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

How State and Federal Gov't. policies are supporting a move towards aquacultured production, leaving the 'wild' resources to provide the basic breeding stock only

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Opportunities to provide input into seafood trade policy and regulation

Very interested

Notice of upcoming webinars

Very interested

Updates on overseas market access and importing country

requirements

Very interested

Q5

Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

Q6 Respondent skipped this question

Which products are you currently exporting (Click all that apply)

Q7 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q8 Respondent skipped this question

As a current exporter what is the biggest challenge you currently face when exporting your product?

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that

apply)

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

How would you best describe your role?

Other (please specify):

Interested individual. Interest = depletion of marine resources.

Q15 Other

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Depletion of 'wild' marine resources and cost/environmental problems associated with establishing 'clean' aquaculture resources within Australia.

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Australian aquacultured seafood and public data associated with aquacultured seafood.

Page 7: Final question

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

Possibly recognise Domestic consumers needs and concerns about exporting our natural resources.

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 1:24:56 PM Last Modified: Wednesday, April 17, 2024 1:29:57 PM

Time Spent: 00:05:00 **IP Address:** 49.182.171.178

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Interested

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

None I can think of

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Not interested |
| Updates on overseas market access and importing country | Interested |

Q5

requirements

Are there any other important topics you would like to see included in Seafood Trade Matters?

No

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|---|----------------------------------|
| Which products are you currently exporting (Click all that apply) | |

Q7 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q8 Respondent skipped this question
As a current exporter what is the biggest challenge you

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

currently face when exporting your product?

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

Other (please specify):

How would you best describe your role?

Fishing leaser

Q15 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Vietnam, Hong Kong

Q16

What do you see as the biggest challenge for Australian seafood exporters?

China tarrifs

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Hopefully China removing tarrifs

Page 7: Final question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

No - keep up the good work

INCOMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 1:32:48 PM Last Modified: Wednesday, April 17, 2024 1:33:02 PM

Time Spent: 00:00:14 **IP Address:** 203.6.146.44

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 2:12:49 PM Last Modified: Wednesday, April 17, 2024 2:19:48 PM

Time Spent: 00:06:58 **IP Address:** 203.6.146.5

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

Alternative protein industry Interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

N/A

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Updates on trade negotiations

Updates to Australian seafood trade regulation and exporter requirements

Opportunities to provide input into seafood trade policy and regulation

Notice of upcoming webinars

Updates on overseas market access and importing country requirements

Very interested

Very interested

Very interested

Very interested

Q5

apply)

Are there any other important topics you would like to see included in Seafood Trade Matters?

Information on Seafood Trade Events (domestic & international)

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|--|----------------------------------|
| Which products are you currently exporting (Click all that | |

Q7 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q8 Respondent skipped this question

As a current exporter what is the biggest challenge you currently face when exporting your product?

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q10

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Government

How would you best describe your role?

| Q15 | China, |
|---|---------------------------------------|
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Japan, |
| | Korea, |
| | Europe, |
| | UK, |
| | Middle East, |
| | South America, |
| | Vietnam, |
| | Hong Kong, |
| | Taiwan, |
| | USA, |
| | Canada, |
| | New Zealand, |
| | India, |
| | Singapore, |
| | Other, |
| | Malaysia |
| Q16 | |
| What do you see as the biggest challenge for Australian sea | food exporters? |
| International competition, tariff & non-tariff trade barriers. Increasing | g focus on MSC & ASC certification. |
| Q17 | |
| What do you see as the biggest export opportunity for Austra | alian seafood in the next five years? |
| N/A | |
| Page 7: Final question | |
| O18 | |

67 / 128

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

N/A

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 11:54:18 AM Last Modified: Wednesday, April 17, 2024 2:32:32 PM

Time Spent: 02:38:13 **IP Address:** 121.200.7.144

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends Interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

consumer trends by age demographic

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Not interested |
| Updates to Australian seafood trade regulation and exporter requirements | Not interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Not interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the | |

Page 5: Aspiring exporter

next five years?

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

How would you best describe your role?

Industry association

Q15

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

China,

Japan,

USA,

Singapore

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Ensuring international buyers continue to recognise Australia's unique high value seafood species such as abalone and willing to pay premium

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

capitalising on clean ocean produce

Page 7: Final question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

nothing comes to mind

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 17, 2024 5:03:48 PM Last Modified: Wednesday, April 17, 2024 5:13:16 PM

Time Spent: 00:09:28 **IP Address:** 116.255.39.146

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Interested

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends

Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry Interested

Pricing information Very interested

Global lobster and abalone production information Interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

With the transition and post it more of the SIA market development info to broaden out the news.

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Interested |
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the | |

Page 5: Aspiring exporter

next five years?

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q10

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Industry association

How would you best describe your role?

Q15 Europe,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

UK,

Middle East

Q16

What do you see as the biggest challenge for Australian seafood exporters?

High costs of business, competing on price in new markets even with a great product Internal market competition between fishers and the lack of a collaborative approach to marketing and market development across all industries.

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Premium markets into markets such as the UK and for some product the EU - where their "developing country" policies don't disadvantage us

Page 7: Final question

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Thursday, April 18, 2024 7:32:55 PM Last Modified: Thursday, April 18, 2024 7:41:34 PM

Time Spent: 00:08:39 **IP Address:** 203.41.209.130

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Not interested

climate change)

Alternative protein industry Very interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

Japan.

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Very interested |
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Not interested |
| Updates on overseas market access and importing country requirements | Interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Industry association

How would you best describe your role?

Q15

China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Japan,

UK,

New Zealand,

Singapore

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Japan

Page 7: Final guestion

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

Keep going, please continue.

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, April 19, 2024 11:37:00 AM **Last Modified:** Friday, April 19, 2024 11:39:41 AM

Time Spent: 00:02:40 **IP Address:** 147.109.11.168

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Very interested

Interested

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry

Pricing information Interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

n/a

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Interested |
|--|----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Not interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Not interested |
| Updates on overseas market access and importing country requirements | Interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

n/a

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|---|----------------------------------|
| Which products are you currently exporting (Click all that apply) | |

Q7 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q8 Respondent skipped this question

As a current exporter what is the biggest challenge you currently face when exporting your product?

Q9 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12

Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13

Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14

Government

How would you best describe your role?

Q15

China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

South America,

Hong Kong,

Taiwan,

Canada,

New Zealand

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Destination market regulation changes

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

SE Asia

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

n/a

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Friday, April 19, 2024 2:12:38 PM

 Last Modified:
 Friday, April 19, 2024 2:14:39 PM

Time Spent: 00:02:00 **IP Address:** 1.159.175.123

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Interested

Alternative protein industry

Not interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Very interested |
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the | |

Page 5: Aspiring exporter

next five years?

Q10 Respondent skipped this question Which products are you planning to export (Click all that apply) Q11 Respondent skipped this question The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. Q12 Respondent skipped this question Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? Q13 Respondent skipped this question What do you see as the biggest export opportunity in the next five years? Page 6: Other than exporters Q14 **Fisher** How would you best describe your role? Q15 China, The STAG provides regular market trends and consumer Japan, insight updates for seafood exporters. Please tell us which Korea, export markets are of interest to you. Europe, UK, South America, Vietnam, Hong Kong, Taiwan, USA,

Singapore,

Malaysia

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q16

What do you see as the biggest challenge for Australian seafood exporters?

China

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Vietnam

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

INCOMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Tuesday, April 23, 2024 2:48:03 PM

 Last Modified:
 Tuesday, April 23, 2024 2:48:14 PM

Time Spent: 00:00:11 IP Address: 144.139.220.111

Page 1: About you

Q1 Planning to export in the next 1-2 years

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Tuesday, April 23, 2024 2:49:53 PM

 Last Modified:
 Tuesday, April 23, 2024 2:53:11 PM

Time Spent: 00:03:18 **IP Address:** 104.28.83.104

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry Interested

Pricing information Interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

How other commodities market themselves

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Interested |
|--|------------|
| Updates to Australian seafood trade regulation and exporter requirements | Interested |
| Opportunities to provide input into seafood trade policy and regulation | Interested |
| Notice of upcoming webinars | Interested |
| Updates on overseas market access and importing country requirements | Interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

Respondent skipped this question

Page 4: Current exporter

| Q6 | Rock Lobster, |
|---|---------------|
| Which products are you currently exporting (Click all that | Abalone, |
| apply) | Other |
| | |
| Q7 | China, |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Japan, |
| | Korea, |
| | Vietnam, |
| | Hong Kong, |
| | Malaysia, |
| | Taiwan, |
| | Singapore |
| | |

Q8

As a current exporter what is the biggest challenge you currently face when exporting your product?

Poor marketing as a country around seafood story

What do you see as the biggest export opportunity in the next five years?

Vietnam and opening up more of China

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16 Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

Happy with service

INCOMPLETE

Collector: Web Link 1 (Web Link)

Started: Tuesday, April 23, 2024 2:54:00 PM Last Modified: Tuesday, April 23, 2024 2:54:07 PM

Time Spent: 00:00:06 **IP Address:** 144.139.166.100

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Tuesday, April 23, 2024 2:52:54 PM

 Last Modified:
 Tuesday, April 23, 2024 2:58:28 PM

Time Spent: 00:05:33 **IP Address:** 119.252.90.161

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Not interested

climate change)

Alternative protein industry

Not interested

Pricing information Interested

Global lobster and abalone production information Not interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Updates on trade negotiations Interested

Updates to Australian seafood trade regulation and exporter Interested

requirements

Opportunities to provide input into seafood trade policy and regulation

Not interested

Notice of upcoming webinars Not interested

Updates on overseas market access and importing country requirements

Not interested

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

Q6 Rock Lobster,

Which products are you currently exporting (Click all that apply)

Other

Q7 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Europe,
United Kingdom,

Vietnam,

USA

Q8

As a current exporter what is the biggest challenge you currently face when exporting your product?

lack of environmental credentials

Q9

What do you see as the biggest export opportunity in the next five years?

high end markets outside China

| Page 5: Aspiring exporter | |
|---|----------------------------------|
| Q10 | Respondent skipped this question |
| Which products are you planning to export (Click all that apply) | |
| Q11 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q12 | Respondent skipped this question |
| Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | |
| Q13 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |
| Page 6: Other than exporters | |
| Q14 | Respondent skipped this question |
| How would you best describe your role? | |
| Q15 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q16 | Respondent skipped this question |
| What do you see as the biggest challenge for Australian seafood exporters? | |

Page 7: Final question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Q17

Respondent skipped this question

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Tuesday, April 23, 2024 3:05:28 PM

 Last Modified:
 Tuesday, April 23, 2024 3:09:54 PM

Time Spent: 00:04:26 **IP Address:** 1.136.19.59

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

ommate onange)

Alternative protein industry Very interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Very interested |
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Which products are you planning to export (Click all that apply)

Respondent skipped this question

Q11

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Respondent skipped this question

Q12

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Respondent skipped this question

Q13

What do you see as the biggest export opportunity in the next five years?

Respondent skipped this question

Page 6: Other than exporters

Q14

How would you best describe your role?

Other (please specify):

Investor

Q15

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

China,

Japan,

Korea,

Vietnam,

Hong Kong,

USA,

New Zealand,

Singapore,

Malaysia

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Diversification into other countries

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Diversification, promoting our clean green product,

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Tuesday, April 09, 2024 12:14:51 PM Last Modified: Wednesday, April 24, 2024 8:28:46 AM

Time Spent: Over a week IP Address: 101.175.69.61

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Interested

Alternative protein industry Interested

Pricing information Interested

Global lobster and abalone production information Interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

requirements

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Updates on trade negotiations

Updates to Australian seafood trade regulation and exporter requirements

Opportunities to provide input into seafood trade policy and regulation

Notice of upcoming webinars

Updates on overseas market access and importing country

Interested

Very interested

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

Q6 Abalone

Which products are you currently exporting (Click all that apply)

Q7 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

United Kingdom,

Vietnam,

Japan,

Korea,

Hong Kong,

Malaysia,

Taiwan,

USA,

Canada,

Singapore

As a current exporter what is the biggest challenge you currently face when exporting your product?

Reliable importing county requirements

Q9

What do you see as the biggest export opportunity in the next five years?

Exporting to Countries outside of China/Hong Kong

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Wednesday, April 24, 2024 4:20:01 PM Last Modified: Wednesday, April 24, 2024 4:28:46 PM

Time Spent: 00:08:45 **IP Address:** 1.147.71.152

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry

Not interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

Respondent skipped this question

Page 4: Current exporter

| Q6 | Abalone |
|----|---------|
|----|---------|

Which products are you currently exporting (Click all that apply)

Q7 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

United Kingdom,

Vietnam,

Japan,

Hong Kong,

Malaysia,

Taiwan,

USA,

Canada,

Singapore,

Other

As a current exporter what is the biggest challenge you currently face when exporting your product?

The ban Victoria and NSW have on SA abalone due to the presence of AVG in a small part of the Southern Zone when we are in the Western Zone. No abalone that hasn't been heat treated can go through those states then on to market.

Q9

What do you see as the biggest export opportunity in the next five years?

Identifying where the Hong Kong people are buying citizenship and relocating due to China taking back Hong Kong.

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

O14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

Geographical market dynamics

COMPLETE

Collector: Web Link 1 (Web Link)

Started: Friday, April 26, 2024 4:11:25 PM Last Modified: Friday, April 26, 2024 4:13:17 PM

Time Spent: 00:01:51 IP Address: 159.207.248.6

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Interested

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management,

climate change)

Alternative protein industry Not interested

Pricing information Interested Interested

Global lobster and abalone production information

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| are most interested in. | |
|---|----------------------------------|
| Updates on trade negotiations | Very interested |
| Updates to Australian seafood trade regulation and exporter requirements | Not interested |
| Opportunities to provide input into seafood trade policy and regulation | Not interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |
| Q5 | Respondent skipped this question |
| Are there any other important topics you would like to see included in Seafood Trade Matters? | |
| Page 4: Current exporter | |
| Q6 | Respondent skipped this question |
| Which products are you currently exporting (Click all that apply) | |
| Q7 | Respondent skipped this question |
| The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | |
| Q8 | Respondent skipped this question |
| As a current exporter what is the biggest challenge you currently face when exporting your product? | |
| Q9 | Respondent skipped this question |
| What do you see as the biggest export opportunity in the next five years? | |

Page 5: Aspiring exporter

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Which products are you planning to export (Click all that apply)

Respondent skipped this question

Page 6: Other than exporters

What do you see as the biggest export opportunity in the

Q13

next five years?

Q14 Government

How would you best describe your role?

Respondent skipped this question

| Q15 | China, |
|--|----------------------------------|
| The STAG provides regular market trends and consumer | Japan, |
| insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Korea, |
| , | Europe, |
| | UK, |
| | Middle East, |
| | South America, |
| | Vietnam, |
| | Hong Kong, |
| | Taiwan, |
| | USA, |
| | Canada, |
| | New Zealand, |
| | India, |
| | Singapore, |
| | Other, |
| | Malaysia |
| Q16 | Respondent skipped this question |
| What do you see as the biggest challenge for Australian seafood exporters? | |
| Q17 | Respondent skipped this question |
| What do you see as the biggest export opportunity for Australian seafood in the next five years? | |
| Page 7: Final question | |
| Q18 | Respondent skipped this question |
| In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters? | |

INCOMPLETE

Collector: Web Link 1 (Web Link)

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 Friday, April 26, 2024 4:15:11 PM

 Last Modified:
 Friday, April 26, 2024 4:15:24 PM

Time Spent: 00:00:13 **IP Address:** 1.145.158.75

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2 Respondent skipped this question

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

Q4 Respondent skipped this question

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Q5 Respondent skipped this question

Are there any other important topics you would like to see included in Seafood Trade Matters?

Page 4: Current exporter

| Q6 Which products are you currently exporting (Click all that apply) | Respondent skipped this question |
|---|----------------------------------|
| Q7 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q8 As a current exporter what is the biggest challenge you currently face when exporting your product? | Respondent skipped this question |
| Q9 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |
| Page 5: Aspiring exporter Q10 Which products are you planning to export (Click all that apply) | Respondent skipped this question |
| Q11 The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you. | Respondent skipped this question |
| Q12 Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve? | Respondent skipped this question |
| Q13 What do you see as the biggest export opportunity in the next five years? | Respondent skipped this question |

Page 6: Other than exporters

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q14

Respondent skipped this question

How would you best describe your role?

Q15

Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Friday, April 26, 2024 4:23:25 PM

 Last Modified:
 Friday, April 26, 2024 4:29:59 PM

Time Spent: 00:06:34 **IP Address:** 120.149.35.6

Page 1: About you

Q1 Other

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Very interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Very interested

climate change)

Alternative protein industry

Not interested

Pricing information Very interested

Global lobster and abalone production information Very interested

Q3

Are there any other important topics you would like too see covered by the STAG News Bites?

Trade delegations

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

| Updates on trade negotiations | Very interested |
|--|-----------------|
| Updates to Australian seafood trade regulation and exporter requirements | Very interested |
| Opportunities to provide input into seafood trade policy and regulation | Very interested |
| Notice of upcoming webinars | Very interested |
| Updates on overseas market access and importing country requirements | Very interested |

Q5

Are there any other important topics you would like to see included in Seafood Trade Matters?

Trade delegations

Page 4: Current exporter

| Q6 | Respondent skipped this question |
|---|----------------------------------|
| Which products are you currently exporting (Click all that apply) | |

| Q7 | Respondent skipped this question |
|--|----------------------------------|
| The CTAC provides regular market trands and consumar | |

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

| Q8 | Respondent skipped this question |
|----|----------------------------------|
| | |

As a current exporter what is the biggest challenge you currently face when exporting your product?

| Q9 | Respondent skipped this question |
|----|----------------------------------|
| | |

What do you see as the biggest export opportunity in the next five years?

Page 5: Aspiring exporter

Which products are you planning to export (Click all that apply)

Respondent skipped this question

Q11

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Respondent skipped this question

Q12

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Respondent skipped this question

Q13

What do you see as the biggest export opportunity in the next five years?

Respondent skipped this question

Page 6: Other than exporters

Q14

How would you best describe your role?

Other (please specify):

quota owner

Q15

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

China,

Japan,

Korea,

Europe,

UK,

USA

Q16

What do you see as the biggest challenge for Australian seafood exporters?

Regaining and maintaining market access

Q17

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Live lobster exports to China

Page 7: Final question

Respondent skipped this question

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

COMPLETE

Collector: Web Link 1 (Web Link)

 Started:
 Friday, April 26, 2024 4:23:10 PM

 Last Modified:
 Friday, April 26, 2024 4:36:55 PM

Time Spent: 00:13:44 **IP Address:** 120.88.123.235

Page 1: About you

Q1 A current exporter

I am...

Page 2: News Bites

Q2

STAG News Bites provides fortnightly updates to subscribers in the Australian seafood market. Please tell us which topics you are most interested in:

China Market Access and Demand (Including translated media) Very interested

Changes in global seafood consumer trends Very interested

New innovation affecting the global seafood market Interested

Global seafood trade issues Very interested

Sustainability issues (e.g. interntational fisheries management, Interested

climate change)

Alternative protein industry Interested

Pricing information Interested

Global lobster and abalone production information Interested

Q3 Respondent skipped this question

Are there any other important topics you would like too see covered by the STAG News Bites?

Page 3: Trade Matters

The STAG Seafood Trade Matters newsletter provides subscribers with fortnightly updates on regulatory seafood trade and market access changes as well as government assistance available to exporters. Please tell us which topics you are most interested in:

Updates on trade negotiations Interested

Updates to Australian seafood trade regulation and exporter Interested

Updates to Australian seafood trade regulation and exporter requirements

Opportunities to provide input into seafood trade policy and Interested

Notice of upcoming webinars Not interested

Updates on overseas market access and importing country requirements

Q5

regulation

Are there any other important topics you would like to see included in Seafood Trade Matters?

Simplifying the Export pr

Page 4: Current exporter

Q6 Other

Which products are you currently exporting (Click all that apply)

Q7 China,

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Japan,

Korea,

Vietnam,

Hong Kong,

Malaysia,

Taiwan,

USA,

New Zealand,

India

As a current exporter what is the biggest challenge you currently face when exporting your product?

Australian Government paperwork.

Q9

What do you see as the biggest export opportunity in the next five years?

not sure.

Page 5: Aspiring exporter

Q10 Respondent skipped this question

Which products are you planning to export (Click all that apply)

Q11 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Q12 Respondent skipped this question

Being at the planning stage of exporting, what has been the biggest challenge you have faced or are still trying to resolve?

Q13 Respondent skipped this question

What do you see as the biggest export opportunity in the next five years?

Page 6: Other than exporters

Q14 Respondent skipped this question

How would you best describe your role?

Q15 Respondent skipped this question

The STAG provides regular market trends and consumer insight updates for seafood exporters. Please tell us which export markets are of interest to you.

Seafood Trade Advisory Group - Trade Matters and News Bites newsletter survey

Q16

Respondent skipped this question

What do you see as the biggest challenge for Australian seafood exporters?

Q17

Respondent skipped this question

What do you see as the biggest export opportunity for Australian seafood in the next five years?

Page 7: Final question

Q18

In general, do you have any other suggestions or recommendations which could help the STAG improve the service it provides to seafood exporters?

No.

| FRDC Project 2022-088 Seafood Trade Advisory Group: Transitioning to a new communications, governance and operating model |
|---|
| |
| Attachment 10: |
| Project Variation Report (December 2024) |
| |
| |
| |
| |
| |
| |

STAG Project Variation Report

Variation July-December 2024: Re-engaging and realigning market access relationships with China for Abalone and Rock Lobster in the post-trade war era.

Summary

At the time of writing this report, a timetable for the restoration of live rock lobster exports (except Tropical Rock Lobster) to mainland China has been announced by the Australian and Chinese Governments. STAG has supported industry engagement with DAFF via the Lobster Working Group (LWG) as talks with Chinese authorities entered this critical stage. Restored access for live lobster, except Tropical Rock Lobster (TRL), is now expected before the end of the calendar year 2024.

In anticipation of the market reopening, STAG has been working with industry and DAFF to manage risks, including the risk of early exceedance/non-compliance and administrative/communication errors leading to the detainment of initial consignments. LWG members and DAFF have expressed an intention to continue meeting as a group into 2025 to manage risks and share information as trade normalises.

Based on industry and government advice, we assess that the TRL ban is expected to be more difficult to resolve and will require sustained industry representations over a longer timeframe. According to the latest DAFF advice, seeking an exemption or having TRL re-listed onto a less restrictive protected species list in China (which would allow for a geographic exemption) are not practical strategies. However, other options may be available, including seeking a change to China's law or pursuing the issue through the World Trade Organisation (WTO). This is acknowledged as highly ambitious.

As of 1 November, DAFF's implementation of NEXDOC, the long awaited and much anticipated new export documentation system, was complete for all destinations. The new system will address challenges associated with printing physical health certificates by allowing for remote printing and automating certain processes. However, due to internal miscommunication, some Chinese port authorities were unaware of Australia's updated documents, resulting in detained consignments and industry losses. STAG intervention supporting exporters helped galvanise DAFF's action to resolve the issue.

Encouraging steps were taken to establish and re-invigorate industry-level relationships with stakeholder organisations in China as part of SIA's China Engagement Plan. After successful visits in August and November 2024, contacts are now in place to build relations with the China Aquatic Products Processing and Marketing Alliance (CAPPMA), the China Chamber of Commerce for Foodstuffs and Native Produce (CFNA), the Agricultural Trade Promotion Centre (ATPC), the Customs Inspection and Quarantine Association (CIQA), the China Cuisine Association (CCA), and the Shanghai Seafood

Trade Association (SFTA). These relationships provide ongoing benefits, including market intelligence and insights, regulatory and compliance support, crisis management, technical capacity building, and network building in support of predictable China market access and trade.

Framework agreements (MOUs) have been successfully negotiated with CAPPMA and CIQA, while talks are continuing with CFNA and SFTA, to finalise and hold signing ceremonies in 2025. The agreements cover information exchange, regular bilateral meetings, mutual support for objectives, and visit programs, laying the foundation for long-term cooperation. These relationships have been framed at the strategic whole-of-seafood industry level. However, there is scope for direct engagement with the rock lobster and abalone industries specifically - for example, China delegations included representatives from the Southern Rock Lobster and Western Rock Lobster industry.

Details of work completed in STAG variation activity areas

Restoration and smooth facilitation of trade in live rock lobster to mainland China

- Meetings of the Lobster Working Group (including in conference with DAFF) were held on 10 July, 15 July, 23 July, 7 August, 21 August, 27 September, 3 October, 4 October, 1 November, 12 November, 22 November, 29 November, and 6 December (Attachment 10.1) to coordinate industry positions and information in support of DAFF negotiations with GACC.
- Supported industry-led LWG delegation to Canberra on 12-13 August (Attachment 10.2), providing briefing and advice on messaging.
- Attended Seafood Directions Conference in Hobart and provided a detailed update for lobster export industry stakeholders plus Q&A on 12 September (see Attachment 10.1).
- Prepared updated briefing material on live lobster and tropical rock lobster bans for government officials' background (Attachment 10.3), ensuring relevant officials have all the information to guide their efforts in restoring trade.
- Drafted and circulated industry updates in July and September (Attachments 10.4 and 1.5) to inform the wider lobster export industry of developments and progress in DAFF/GACC talks.
- Drafted letter stating industry position on GACC requests for SIA correspondence with DAFF (Attachment 10.6) to clearly state industry agreed positions on processes surrounding the resumption of trade.
- Coordinated and provided industry advice to DAFF on seasonality across Australia's lobster fisheries to assist in planning on-site inspections by GACC.
- Completed LWG on-boarding processes for new ERL representatives, Scott Westley and Mark Cranstone (alternate), ensuring engagement with all four commercially harvested rock lobster species.
- Supported SIA coordination of industry statement in response to the announcement of trade restoration timetable in October (Attachment 10.10).
- Drafted industry-level media statement and talking points for use when trade returns and coordinated DAFF feedback (Attachment 10.11).

- Facilitated discussions between DAFF and industry around registration of establishments for live export to China and reviewed associated DAFF Market Access Advice.
- Worked to develop and agree industry positions about potential future non-compliances and/or requests from GACC to investigate at a more systemic level, providing an approach that will work for the industry in future.
- Supported industry discussions and communications around the management of risks associated with resumed trade, such as new exceedances and/or administrative errors.
- Updated wider lobster industry on access developments as part of SIA's lobster advocacy group meeting on 28 November.

Restoration of trade in Tropical Rock Lobster with mainland China

 Arranged meeting of the TRL subgroup of the LWG with DAFF on 8 August, represented STAG at TRL subgroup meeting with DAFF on 27 September, and hosted meetings with the subgroup on 11 October, 16 October, 25 October, 1 November, 11 November, 15 November, 22 November and 6 December (Attachment 10.7) to coordinate industry positions and information in support of DAFF negotiations with MARA and develop industry strategies to mitigate the impact of the ban and ultimately resolve it.

Resolution of current health certificate issues with China

- Monitored DAFF implementation of NEXDOC
- Amplified DAFF messaging to the industry around NEXDOC registration timelines by publishing
 prominent reminders in STAG newsletters, ensuring that exporters completed the necessary
 processes before the cut-off date.
- Responded to distressed consignments arising from the flawed implementation of the NEXDOC update in China, making representations to DAFF and liaising with exporters.

Support lobster and abalone industries in establishing and maintaining relationships with key influencer organisations in China, including support for industry delegations to China.

- Facilitated access to China Fisheries and Seafood Expo in Qingdao and CIIE in Shanghai, providing on-the-ground logistical support, cultural and communication advice, trade and market analysis, and other assistance to industry delegates from the rock lobster industry (SALCO).
- Facilitated seafood market research, including wholesale and retail visits for WRL
 representatives, CEO Matt Taylor and Fisher Director Justin Pirrottina, enabling these delegates
 to observe firsthand commercial factors, including the prevalence of low-priced Mexican rock
 lobster, abundance of cheap Russian king crab, a competitor in the premium seafood category;
 presence of grey-traded product in the market; novel consumer seafood channels, such as live
 seafood selection and preparation in-store.

 Gained input from exporters, including Ferguson's Australia and Jade Tiger Abalone, on industry market access priorities, including TRACES certifications for EU; difficulties caused by changes to the Australian Fish Names list (e.g. Flathead) for EU; SO2 in abalone to China; and requested additions to the Approved Species List (species TBA).

Support execution of the SIA 'China Engagement Plan' as needed, including translation service and policy/cultural advice

- Arranged and facilitated a curated program of high-level calls and other activities for SIA-led industry delegation to China in August (Attachment 1.8), providing a strong, issues-led foundation for developing institutional relationships with Chinese partners, facilitating basic market and cultural awareness for key SIA staff and industry delegates.
- Provided input into SIA CEO Veronica Papacosta in her speech at the Australia-China High Level Dialogue in Canberra in August (Attachment 10.9), ensuring alignment with industry market access objectives in messaging to Chinese delegates.
- Provided input on technical cooperation with China into SIA's planned project under the Australia-China Foundation to strengthen the market access elements of SIA's China Engagement Plan by securing resources for dedicated capacity-building work.
- Visited Beijing and Qingdao in October for meetings associated with SIA China Engagement (CIQA, CAPPMA, ATPC) and provided support for Australian exhibitors at CFSE (Attachment 10.15), building on the August visit and representing SIA and industry in maintaining and developing key relationships.
- Arranged and facilitated a program of meetings and activities for SIA-led industry delegation to China in November (Attachment 10.16), ensuring Australian seafood made a high-impact impression as part of attending the China International Import Expo, securing meetings with key dignitaries, including opportunities to raise market access priorities.
- Finalised of text for SIA Memoranda of Understanding with CAPPMA and CIQA (Attachments 10.17 and 10.18, respectively) to serve as the formal basis for long-term institutional cooperation, with benefits for export industry resilience and profitability going forward.
- Established high-level contact with a key leader in CFNA, Mme Yu Lu, and proposed MoU to guide cooperation.
- Secured invitations to provide a speaker for next year's CFNA Food Summit, recommended a salmon aquaculture expert to attend the CAPPMA symposium; and referred Embassy personnel to attend CAPPMA Seafood Summit, taking the first steps in practical cooperation and providing opportunities to collaborate with partners in 2025.

STAG News Bites and Trade Matters newsletters

 Between 1 July and 16 December, continue to source and analyse market intelligence on rock lobster and abalone trade issues globally and curate and distribute the newsletters, producing and distributing eleven editions of Seafood Trade Matters and eleven editions of STAG News Bites.

Support SafeFish on Technical Trade and Market Access Issues

- Represented STAG in SafeFish Quarterly Meeting on 5 August, providing an update on market access work with China, soliciting an update from DAFF on NEXDOC implementation, and offering views on NRS review processes.
- Provided input into SafeFish proposal to conduct an 'opportunity cost' review of the NRS system, highlighting industry priority issues, including the lack of appropriate testing for wildcaught species.
- Provided input into the SafeFish Risk Register process, ensuring rock lobster and abalone export industry priorities are properly considered so that the industry and SafeFish can be better prepared to act in a future crisis.