



Australian Government

Australian Fisheries Management Authority

Great Australian Bight Resource Assessment Group

Research Workshop

4 December 2012

Adelaide

Minutes

Attendees

Prof Gavin Begg, Workshop Chair, PIRSA-SARDI

Mr Brad Milic, AFMA Member

Mr Ross Bromley, AFMA Member

Dr Rik Buckworth, Chair GABRAG, CSIRO

Dr Ian Knuckey, Scientific Member, Fishwell Consulting

Dr Neil Klaer, Scientific Member, CSIRO

Mr Andy Moore, Scientific Member, ABARES

Ms Marcia Valente, Industry Member

Mr Jim Raptis, Industry Member

Mr Jeff Moore, Industry Member, GABIA

Ms Karen Dalli, Executive Officer GABRAG, AFMA

The workshop opened at 10:20 am.

Session 1 – Context and strategic overview (vision for the fishery/industry)

1. Welcome and Introductions

Members were welcomed and the declarations of interest were followed through from the RAG meeting. In keeping with normal practice, it was agreed that the meeting would be recorded to assist with preparation of the minutes.

The Chair informed members that the aim of the workshop is to discuss and aid in developing strategic research plans, within that annual research work plans, including ongoing competing priorities and competing issues with resources and funding, and the feasibility of research plans moving away from a target species focus (e.g. to profitability and licence to operate).

1.2 Declarations of Interest

Participant	Interest Declared
Prof Gavin Begg, Chair	PIRSA – SARDI, no pecuniary interest
Mr Brad Milic, AFMA member	No pecuniary interest
Mr Ross Bromley, AFMA Member	No pecuniary interest
Dr Rik Buckworth, Scientific Member	GABRAG Chair, employed by CSIRO, interest in sources of funding for research purposes and Director of a small company that sells hooks that sample tissue.
Dr Ian Knuckey, Scientific Member	Director Fishwell Consulting, research work for GABIA – Interest in sources of funding for research purposes and a purveyor of electronic logbook systems.
Dr Neil Klaer, Scientific Member	Employed by CSIRO – Interest in sources of funding for research purposes
Dr Andy Moore, Scientific Member	Employed by ABARES - Interest in sources of funding for research purposes, no personal pecuniary interest
Mr Jim Raptis, Industry Member	GAB boat and quota SFR holder
Ms Marcia Valente, Industry Member	GAB boat and quota SFR holder
Mr Jeff Moore, Industry Member	Great Australian Bight Industry Association (GABIA) EO, board member of Commonwealth Fisheries Association and industry member for Marine National Parks – No pecuniary interest.
Ms Karen Dalli, AFMA, GABRAG EO	No pecuniary interest

2. Over-arching background and context

The Chair explained that a number of guiding documents (National Plan, AFMA Strategic Research Plan, AFMA's review into scientific and economic info etc) provide guidance and context to the discussions. These documents are about setting the broad agenda on the research activities that need to take place. The Oceans Policy Science Advisory Group (OPSAG) document contains the information to convey including the ongoing importance of marine observations. A key document is the AFMA strategic research plan which highlights the following four programs:

- fisheries stocks and biology;
- ecosystem-based fisheries management;
- evaluation; and
- development.

In terms of the broader strategic environment there are numerous overarching documents stipulating priorities and where the fishery should be investing. The question is where does industry and this fishery want to be with the current competing environment and economic pressures, and public and community perceptions? The meeting agreed the GABTF has been fairly proactive from a sustainability point of view, having invested heavily in FISs, stock assessments and other work over the last decade.

Industry members noted the fluctuating nature of catches and fish availability over time, which makes funding of expensive research difficult to plan. Industry reiterated the need in the future to further improve price, rather than "fishing for volume". Areas that can potentially be improved are quality, handling, efficiency and marketing.

3. AFMA's risk/catch/cost framework and what this means for prioritisation.

Industry advised that the risk/catch/cost framework needs to be applied to ensure research is applied in line with requirements and realistic budgets. Research is a significant component of industry levies. The meeting considered how these costs could be "smoothed" over time, noting that this is challenging. Costs associated with the FIS are an important consideration to keep in mind. It is a high priority for the GABTF, AFMA and FRDC to look at these issues as it is government policy to undertake a FIS.

Industry considered that the overall review and the cost benefit analysis of the FIS should not just come from the GAB industry budget but as a national strategic body and put forward as a broad priority to Commonwealth Fisheries Research Advisory Body (ComFRAB) and FRDC.

4. Fisheries Research and Development Corporation (FRDC)

FRDC may potentially collect levies in the future for the promotion of the science and the fishery and this is a topic we need to put energy into.

5. Looking to the future – strategic research plan for the GABTF

The meeting discussed the changes in pressures over time, extending from not only a focus and need to prove sustainability for key species, but to profitability, community

expectations and broader ecosystem impacts. The risks, drivers and opportunities identified and discussed included:

- Environmental issues - sustainability with respect to bycatch (Stingarees, Skates and Rays may potentially become a risk to this fishery) and broader considerations such as effect of gear on the bottom
- costs
- profitability (including value adding new products/maximising value)
- marketability (good niche product, defined fishery area and species, “clean green” origin labelling)
- “Branding” – Bight red snapper, Bight flathead, Bight jackets etc. “Bight” as GABIA marketing name
- social licence to operate and public perception (developing the social capital within the industry and outside in the community, balancing the debate, selling the good message about the fishery)
- Third party certification (MSC vs other options)
- benthic/habitat impacts - the effects of the gear on the bottom and how these are counteracted by marine parks
- climate and environmental drivers, issues around recruitment variability
- crew, competing priorities and industry keeping qualified crew versus foreign crew
- continued access including competing users e.g. oil and gas
- continuing issues, risk or drivers around energy efficiency
- management framework
- driver around food security – diversifying and utilising sustainable bycatch
- streamline cost on research and management

Profitability

Profitability was identified as one of the main research directions. The GABTF is first-rate in regards to environmental credentials; however this fishery is close to being unprofitable due to 3-4 days travel to/from fish and being furthest away from the main markets.

There was discussion of possible options to increase profitability in the fishery including the opportunity to utilise profitable bycatch and discard species e.g. latchet. Bycatch species should have their potential use analysed. This could also have a positive advantage to the fishery as better utilisation of all catch will most likely improve public perception.

Premium product

Industry informed members that it is possible to maximise and improve the GAB product quality and shelf life through improved rapid chilling on vessels using liquid ice, and by modifying handling procedures. The quality of the fish improved when handling techniques changed to unloading fish straight from the vessel to the truck and not being held in port. If you build quality and improve shelf life, the demand increases and you can enter a niche market. The product is currently selling and there are no customer complaints, but the GABTF could always improve on quality.

Marketability

There are good opportunities in the GAB that could be marketed, as it is a niche fishery with a niche product. It is a defined fishery, good product, good water, clean green message. The GABTF want to be known as producers of premium quality fresh fish to the Australian market and identified that branding could maximise profit to this market.

The members discussed the merit of MSC accreditation and decided that further thought and discussion may be needed before proceeding with this option. It was suggested that utilising ABARES fishery status reports and FRDC fish status reports to promote the product was a viable option rather than MSC which is expensive.

Deepwater Flathead has a three per cent higher yield than Tiger Flathead, the fillets are larger and they can demand a higher price. Therefore branding is important for consumers to be informed of the product they are purchasing. The option of including 'Bight' in front of the names of fish products was discussed. Noting the importance to establish branding when there are exhibitions with international guests that are interested in the product as it enables them to identify where the product comes from and how to obtain it.

Branding, marketing and promotion is important and it was recommended that talking to a marketing professional would be beneficial, along with being prepared for the technology of the future (i.e. website, social media etc.) and possibly employing a celebrity chef to promote the niche market and products.

Action Item – GABIA investigate labeling and marketing for Bight Products.

Sustainability

The difference between GAB products and other fisheries is sustainability, location, product exclusivity, quality, pristine waters, minimal interaction with TEP and high risk species, and constant product coming through as vessels land regularly.

Costs

Industry noted that the biggest price increase is going to be in improving the product quality.

There was discussion on the breakdown of costs in the fishery and whether energy audits are used on the vessels to minimise diesel usage e.g. freezer usage. Industry informed members that there is an attempt to put a usage cost on each item to investigate if it can be reduced. Jeff Moore informed members that this has been discussed by multiple fisheries and they have been advised to consolidate their project. Jim Raptis informed members that utilising foreign vessels and crews will maximise the returns to the operators and the community. Members noted that to sell to the Australian market it may not be a beneficial image to use foreign vessels and crew.

Another option discussed was whether the current logistics are suitable for the amount of time steaming. An alternative could be teaming up (i.e. mother ship approach), klondiking or transshipping at sea as reducing fuel costs would be advantageous. Marcia Valente commented that it probably would not be a suitable option as the GAB has dangerous weather and to transfer at sea would be hazardous for the crew.

Industry would like to move away from the Melbourne markets as it used to be a premium market but now is declining in its ability to pay for high quality fish/price. Industry continues to utilise this market to spread the fish out and the other markets are unable to support the quantity of fish required. The overseas market will open if the quality and profitability improves.

Employment

Members were informed that it is hard to find and retain good employees, as there is no career path and no young people moving into roles. It is hard to compete with the mining industry and when you get new workers and train them to a suitable level they move on to a more profitable fishery or industry.

Workshop adjourned at 12:25 pm and resumed at 1:00 pm.

Session 2 – GABTF specific research plan, research priorities and data needs

6. GABTF current research strategy and elements.

This session discussed the research priorities for the 2013/14 financial year, and two to three years beyond, including the GABTF research assessment strategy table (Attachment A). The table gives a structure and framework in terms of how to go forward which can be reviewed in the future; members noted that this table should be reviewed if any break-out rules are triggered.

Assessment

The Bight Redfish assessment is on a three year cycle and the next one is due in 2014.

The Deepwater Flathead assessment is on a two year cycle and the next one is due in 2014. Members discussed undertaking another assessment in 2013. If an assessment is to be undertaken for Deepwater Flathead in 2013 it should be accompanied by a FIS in early 2013 to gain additional information for the assessment. However, this would have to be funded solely by industry. If the FIS goes through next year it will be an additional FIS.

It was decided to review the Orange Roughy information in the next few years to decide whether it should continue on a research catch allowance or can return as a commercially targeted species.

Further discussion on Western Gemfish is required to decide whether to budget this species as a Tier 1 or return it to Tier 4.

Fishery Independent Survey (FIS)

There is currently no FIS in place for 2012/13; however, a FIS is proposed for Feb-March 2014.

It was noted that the focus of the FIS for the past few years was to address stock sustainability issues. It collects otoliths, length frequencies and relative abundance indices for a range of bycatch species, catch composition, and retained and discarded catch figures. However, the FIS is not currently being utilised to its full potential, there is a lot the FIS can do that does not seem to be explored. A project was put forward that was initially supported and part of this project was a feasibility study for the FIS, but there was no money to fund it.

Jeff Moore stated that one way to get greater utility in the FIS would be to drop assessments altogether for Bight Redfish while catches remained relatively low to the RBC and utilise the FIS as a proxy assessment.

Maximum Economic Yield (MEY) Study

An important consideration is MEY and should it be updated prior or post the review. It was discussed that another MEY study would only be beneficial if there is a major change (at least 20%) in the fuel prices, Australian dollar and/or fish prices.

Industry noted that there is no access to data with MEY inputs which makes it difficult to notice if there is a change. There needs to be a data collection revision to review the average fuel price and fish price for the main target species and make them available for industry.

Neil Klaer mentioned that a bio-economic simulation model would be beneficial.

Action Item: GABIA – prepare a short paper for the next RAG meeting summarising the MEY study and suggest some of the potential break out rules e.g. prices of fish and steepness.

GABIA length measurements

Members agreed that industry onboard length measurements should be conducted annually.

Integrated Scientific Monitoring Program (ISMP)

The ISMP provides information on TEP interactions, a fine scale breakdown of discard species and discard rates, and collects otoliths.

The current ISMP onboard data collection occurs 70 days every second calendar year which rolls over to 35 days every financial year, resulting in data being collected every financial year rotating onboard and port ISMP data collection.

ISMP onshore (port) quota otolith collection is not being undertaken at present. Members agreed that data should be collected on the off year of ISMP onboard data collection. In the last assessment the target was not reached, the minimum sample size of 600 for each species should be collected to meet the target.

Onshore port sampling is conducted every year and collects otoliths for Western Gemfish and other slope species.

Slope species monitoring

Members agreed that onshore non-quota length frequencies and otolith collection should be undertaken every year.

Byproduct Monitoring

There was discussion on the monitoring of byproduct species which identified the top species such as Latchet, Leather Jacket, Stingrays, Stingarees and Ornate Angel Sharks, making them a focus for the future. This will ensure that forward planning for slope species monitoring, ISMP and GABIA length measurements will be identified and focused on for that year.

A possibility is to focus the ISMP on a rotating calendar every year to have a different species targeted. Latchet was identified as a species to be focussed on in 2013/14.

Bycatch

Members noted that general bycatch is a large risk to the fishery, even though the ERA showed no high risk species. It was discussed that there needs to be further development in promoting the good work that has been done, building better relationships with NGOs, continuous improvements and research development.

Logbook

Action item: AFMA Manager - to check if the new vessel operating in the GAB is using e-logs.

There was discussion on the information and research platform on ground truth and surface temperature that vessels can provide which may be utilised by other stakeholders such as BP and DSEWPaC. Industry was encouraged to be proactive, volunteer their vessels and get involved in projects by speaking to Rudy Kloser (CSIRO – Hobart), who is running a project on collecting data from vessels by bolting sensors on the hull.

RAG meetings

Members agreed to have two face to face meetings annually and a planning day every year. An option would be to have the planning day attached to one of the RAG meetings incorporating MAC members. It was suggested that Kate Brooks, manager of the FRDC funding program, or an economist from ABARES would be beneficial at the planning meetings.

7. The next 1-5 years for research in the GABTF – what, when, where, who, why and how?

It was noted that it is important not to wait until the RAG meeting in October to address the issues discussed in this workshop. There needs to be details on the timeline, costs and responsibilities in early 2013. An option is to have this discussion at the MAC meeting in early 2013.

8. Potential new projects and funding sources

There is a need to capture the desired research from a strategic point of view and seek funding for these from a variety of sources in the future as the table incorporates core activities and monitoring activities funded for by the fishery.

9. Wrap-up and next steps

GABRAG Chair and members thanked Gavin Begg for facilitating the workshop.

Workshop closed at 2:50 pm.

Summary

The discussions from this workshop formally go to the RAG, which endorses the information to put forward to GABMAC and Commission.

This fishery wants in the future:

- clean green image with a premium product,
- high quality fresh Australian seafood,
- maximise quality including shelf life (areas and projects to look at),
- opportunity in a niche market noting that where you're at in quantity,
- origin labeling is important in terms of 'bight' product,
- traceability links up in the labeling issue,
- whole area of branding and marketing accreditation (employ professionals that can focus on the points of interest particularly the location and where the product comes from),
- predominantly still in the Australian market,
- depending on the economic market there could be an opportunity Internationally,
- how you can optimise and mix and match you market flow through apart from Melbourne,
- clear opportunity diversifying and utilising byproduct (food quality project may come up with alternate uses),
- flow through to social licensing question and how the product is seen and the social aspect.

Next RAG Meeting

Priorities to discuss at the next RAG meeting are:

- decision rules and economic indicators that could trigger a review of the MEY, and
- the number of observer days for the financial year with the extra boats coming into fishery.

ATTACHMENT A – GABTF future research and assessment priorities plan (2012 update)

		2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Bight Redfish*	TAC	2,000t	2,000t	1,653t	1,556	2,334t	2,358t	2,358t	TBC	TBC	TBC
	Assessment	x	✓	x	✓	x	x	✓	x	x	✓
Deepwater Flathead*	TAC	1,400t	1,300t	1,100t	1,500t	1,560t	TBC	TBC	TBC	TBC	TBC
	Assessment	x	x (update)	✓	x	✓	?	✓	x	✓	x
Western Gemfish	Assessment					✓	x	x	✓	x	x
Orange Roughy	Assessment					x	x	x	x	x	Review data
FIS		✓	x	✓	x	x	✓	x	?	?	?
Research Workshop?						✓	?	?			
MEY Study		x	Developed				Review sensitivity				
MSE/FIS Review						x	??	??	x	x	
GABIA Length Measurements	Industry onboard	NA	✓	✓	✓	✓	✓	✓	✓	✓	✓
ISMP (onboard)¹		✓	x	✓	x	✓	x	✓	x	✓	x
(onshore quota otoliths)		x	✓	x	✓	x	✓	x	✓	x	✓
Slope Species Monitoring (onshore non quota LF & otoliths)		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Byproduct Monitoring							Latchet?	Ocean Jacket?	Ornate Angel?	Stingeree?	
BYCATCH	Seabird Management Plans		Developed	✓	✓	✓	✓	✓	✓	✓	✓
LOGBOOK (e-logs & paper)	(discards recording)	Education✓	Monitoring✓	Audit✓	✓	✓	✓	✓	✓	✓	✓
RAG (meetings)		1	2	2	2	2	1	2	1	2	2
MAC (meetings)		1	1	1	1	1	1	1	1	1	1

*default setting – can be influenced by decision rules as outlined below

¹ Calendar year, not financial year