

CEO Report





1. April 2019 Catch update
2. Current and future Market conditions
3. Resource Access Security – WA Lobster debacle
4. Centro and the AIRF call for projects
5. Abalone Council Australia update
6. Trans Tasman Abalone Convention

Catch Update. 11th April 2019

11-Apr-19

	2019 TAC kgs	Total Caught	Total Uncaught	% of TAC taken
Bass Strait Blacklip	91,000	12,584	78,416	13.8
Eastern Blacklip	252,000	9,849	242,152	3.9
Greenlip	108,500	15,099	93,401	13.9
Northern Blacklip	98,000	29,157	68,843	29.8
Western Blacklip	717,500	270,651	446,849	37.7
Total	1,267,000	337,340	929,661	26.6

Steady improvement in Beach Price since 2013

Average Quarterly Beach price spreads (all product forms) -

\$30 to \$36/kg in 2013

\$33 to \$39/kg in 2014

\$39 to \$45/kg for 2015

\$44 to \$56/kg for 2016

\$47 to \$56/kg for 2017

\$59 to \$65 so for 2018

In lead up to CNY beach price of \$80/kg for live blacklip and overseas selling price at over \$100/kg. Currently \$73/kg.

Current beach prices;

Live East and West zones \$73

Northern Zone: \$43 to 45

Bass Strait Zone: \$43 to \$45

Greenlip: TBA

AQU's currently trading at \$270k with fish

State of Chinese Economy



Shoppers peruse vendors' wares on a street in Beijing
TAC CEO Report April 2019
Tomohiro Ohsumi | Bloomberg | Getty Images

15/04/2019

HSBC Bank projections published 8th April 2019



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tightening is nurturing...

greater disruption, says...

gaining on nigns

capitalism starting with nigner...

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CHINA ECONOMY

HSBC predicts China's 2019 GDP will soar past others' estimates

PUBLISHED AN HOUR AGO



Kelly Olsen

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KEY POINTS

- China's efforts to stimulate its economy by focusing on the private sector will lead to a "self-sustained recovery," according to HSBC.
- The British bank says Chinese growth has hit bottom and stimulus led by a massive cut in taxes and fees announced last month will propel the economy to an expansion of 6.6 percent for 2019.
- "The shape of the stimulus package this time is very different from earlier rounds," HSBC economists said in a report. "We believe that it will not only work, but will also trigger a self-sustained recovery in the coming quarters."

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April 8, 2019 Bulletin

Since initiating market reforms in 1978, China has shifted from a centrally-planned to a more market-based economy and has experienced rapid economic and social development. GDP growth has averaged nearly 10% a year—the fastest sustained expansion by a major economy in history—and more than 850 million people have lifted themselves out of poverty.

Although China's GDP growth has gradually slowed since 2012, as needed for a transition to more balanced and sustainable growth, it is still relatively high by current global standards.

With a population of 1.3 billion, China is the world's second largest economy and the largest if measured in purchasing price parity terms. China has been the largest single contributor to world growth since the global financial crisis of 2008.



THE WORLD BANK
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Rapid economic ascendance has brought on many challenges as well, including high inequality (especially between rural and urban areas), challenges to environmental sustainability, and external imbalances.

China also faces demographic pressures related to an aging population and the internal labor migration.

China's rapid economic growth exceeded the pace of institutional development, and there are important institutional and reform gaps that it needs to address to ensure a sustainable growth path.

Significant policy adjustments are required for China's growth to be sustainable. Managing structural reforms and related risks will not be straightforward given the complexity, size, and global importance of China's economy.

China's 13th Five-Year Plan (2016-2020) addresses these issues. It highlights the development of services and measures to address environmental and social imbalances, setting targets to reduce pollution, to increase energy efficiency, to improve access to education and healthcare, and to expand social protection.

The 13th Five-Year Plan's annual growth target is 6.5%, reflecting the rebalancing of the economy and the focus on the quality of growth while maintaining the objective of achieving a "moderately prosperous society" by 2020 (doubling GDP for 2010-2020).

Last Updated: Apr 08, 2019

Devaluation of dollar is helping.....4% decrease since July

1 Australian Dollar equals

0.74 United States Dollar

<input type="text" value="1"/>	Australian Dollar
<input type="text" value="0.74"/>	United States Dollar



1 Australian Dollar equals

0.71 United States Dollar

16 Oct., 5:35 am UTC · Disclaimer

<input type="text" value="1"/>	Australian Dollar
<input type="text" value="0.71"/>	United States Dollar



1 Australian Dollar equals

0.71 United States Dollar

9 Apr, 7:44 am UTC · Disclaimer

<input type="text" value="1"/>	Australian Dollar
<input type="text" value="0.71"/>	United States Dollar



Stealing your fishery access rights

– WA Labor Government attempts to shaft the largest Australian fishing industry – Western Rock Lobster debacle 2018/2019

WA Fisheries Minister Dave Kelly (ex Union leader) decides in November 2018 to increase lobster take from 6300 tonnes to 8000 tonnes

Of the 1700 tonne increase,
Government to steal 81% or 1385 tonne
(17% of fishery!)

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Rock lobster fishers feel the pinch amid planned sweeping changes to WA industry

By [Briana Shepherd](#) and [Jessica Hayes](#)

Updated 8 Jan 2019, 6:02pm



PHOTO: Geraldton fisherman Jake Suckling says he is concerned for his 19-month-old son Hale's future. (ABC News: Chris Lewis)

At a meeting on November 28, the Government announced the social objectives it wants from its 1385 tonnes of quota: “Up to 500 tonnes may be conferred by WAG (WA Government) under non-commercial terms (i.e, for Aboriginal economic development or market development or a local lobster program).

Mr Kelly, a former head of WA’s biggest left-wing union, this week strongly defended the proposed shake-up, saying the rock lobster fishery was a “government resource” but the public was missing out on most of the benefits associated with it.

He said the State planned to use its stake in the fishery to supply the tourism and hospitality sectors, saying they struggled to get affordable lobsters under current arrangements.

INDUSTRY RESPONSE

National fishing industry headed by Seafood Industry Australia and the Western Rock Lobster Association mounts campaign.

Meeting in Fremantle in early February 2019

Fishing sector representatives present or on conference call

Strategy discussed and agreed upon

2 days later, WA McGowan Government backs down.....

WA Government backflips over rock lobster crackdown

By [Nicolas Perpetch](#)

Updated 8 Feb 2019, 6:08pm



PHOTO: [The government has backed down in its fight against rock lobster fishers.](#) (ABC Rural: Karen Hunt)

The McGowan Government has backed down on another key proposal, retreating on its controversial plan to take control of part of Western Australia's lobster industry after weeks of heated debate and lobbying against the move by fishers.

RELATED STORY: [WA rock lobster fight intensifies, with legal action and claims of bullying](#)

RELATED STORY: [Extra rock lobsters caught for WA public were kept by fishers to eat themselves](#)

RELATED STORY: ['Too expensive': Restaurateur backs lobster industry shake-up](#)

Compromise after fierce campaign

But the industry mounted a sustained campaign against the move, saying it would place fishers under financial strain and threaten the fishery's sustainability.

Instead of increasing the catch by a total of 1,700 tonnes, industry and the Government have agreed the annual catch will now be increased by just 315 tonnes, with all or a significant majority of that allocated for local supply.

None of the 315 tonnes will be state owned or controlled.

Western Rock Lobster Council chairman Kim Colero said it was a very good outcome and the industry was happy.

"State ownership is off the table," Mr Colero said.

Fisheries Minister Dave Kelly rejected suggestions it was a humiliating day for him, and said the agreement to increase the catch by 315 tonnes was a "great outcome" and would provide more lobsters for West Australians.

Feeling the pinch



Uncertainty over the WA rock lobster fishery has already cost many dearly.



PHOTO: Western Rock Lobster Council chairman Kim Colero and Fisheries Minister Dave Kelly celebrate the deal.
(ABC News: Nicholas Perpetch)

Tasmanian Abalone Deed – gold standard resource access security

1. Schedule to the *Living Marine Resources Management Act 1995*
2. Established 1994 (with 10 year term) and upgraded in 2004 to 28 year term with subsequent 20 year terms
3. Fishery Access rights granted in PERPETUITY
4. Royalties paid qtrly in arrears 10% reduced to 5% by 2022
5. The *Abalone Deed of Agreement* (old and New versions) provides holders with the right to take from State waters abalone that are above the legal minimum size to the amount of 1/3500th of the total allowable catch for every abalone quota unit held by those people.
6. The amendment to the *Fisheries Act 1959* that established the power for the Director to enter into a deed also established a formal **register of third party interests** in quota units under a deed. This DPI Register of Interests was developed and subsequently improved over time with input from the banking sector. Some banks will now lend up to 60% of the sale price of a quota unit without security.

RECAP- 2018 State Election Commitments

The Liberal Government has confirmed in the State Budget support for the following outcomes:

Establishment of the Abalone Industry Re-investment fund (AIRF)

- **\$5.1 million over next 4 years**
- Review of AIRF in 2022 prior to permanently reducing royalty to 5% .
- The royalty reduction will be legislated before the end of the next parliamentary term.

AIRF and Centro update.....



THE HAUL: Bags with hundreds of the sea urchins



AIRF Governance

- The AIRF is administered by a Management Committee made up of representatives from the TACL, DPIPWE and expert adviser from IMAS.
- Two meetings so far...
- Initial flat subsidy of 75 cents/kg revised into a zonal subsidy in order to direct more effort to the south towards Cape Pillar
- Centro Strategic Plan being developed: November 2019
- Call for EOI's: May 6

AIRF Advisory Committee:

DPIPWE: Director Marine Resources (Chair)

DPIPWE: Manager Wild Fisheries Management Branch

DPIPWE: Principal Fisheries Management Officer (Dive Fisheries)

TACL: President

TACL: Vice President

TACL: Treasurer

TACL: Chief Executive

IMAS: Prof. Caleb Gardner - adviser

(Executive officer [DPIPWE])) minute taker

Decisions by consensus – power of veto

Centro harvested to date via TACL subsidy:

2016: 17,979 kgs or about 54,000 urchins

2017: 34,816 kgs or about 105,000 urchins

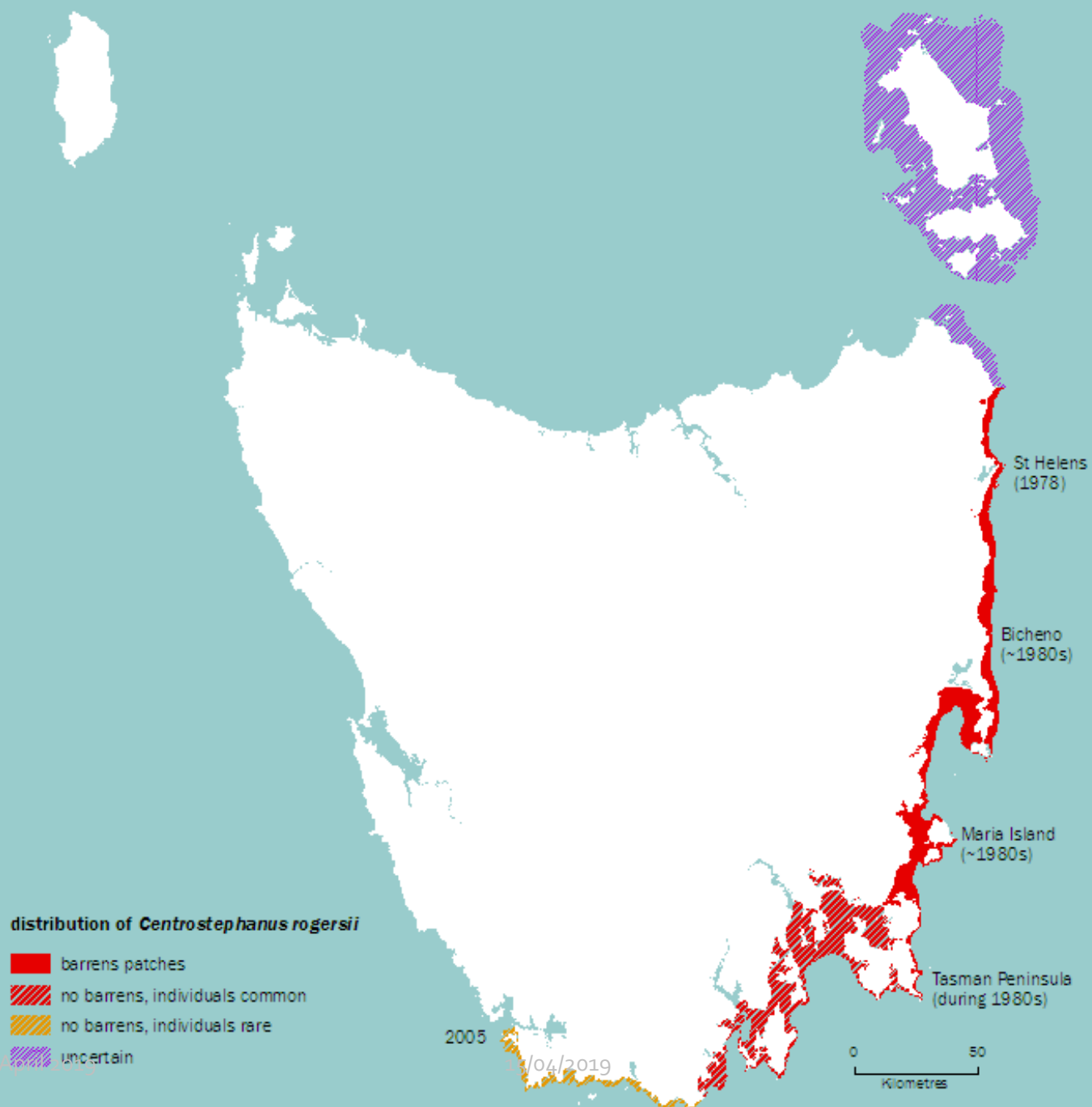
2018: 172,116 kgs or about 516,000 urchins

2019: 222 tonnes to date – aiming for 450 tonnes

TOTAL: 446,911 kgs

Total number urchins removed to date: 1.3 million.....

From between St Helens/Bay of Fires region south to Cape Huay.



TACL Media release 5th March 2019

More than a million sea urchins removed from kelp beds

Emily Jarvie

Local News



PEST: Tasmanian Abalone Council chief executive Dean Lisson and urchin diver Barry Bennett with a sea urchin.

Abalone Council Australia Update



**Abalone Council
Australia Ltd**

Managing the future of the Australian Wildcatch Abalone Industry

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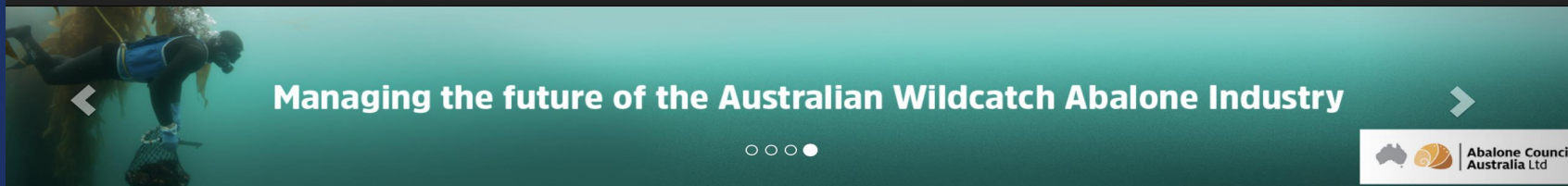
State Information ▾

Research & Development ▾

Australian Wild Abalone ▾

National Abalone Convention ▾

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The Abalone Council Australia Ltd (ACA) is the peak industry body representing the wild-harvest abalone Industry from the five producing states of Tasmania, Victoria, South Australia, Western Australia and New South Wales. Collectively these state-managed fisheries will produce 2,900 tonnes (wet live weight) of wild harvest product in 2018, which represents about 50% of the total global supply of wild caught abalone.

One of the primary functions of the ACA is to oversee and manage national Research and Development investment in abalone related research.

The ACA has partnered with the Fisheries Research and Development Corporation (FRDC) to ensure that investment in abalone related R&D supports and underpins the developmental needs of the Australian Wild Harvest Abalone industry. The ACA provided the services and organisaitonal structure to support and deliver FRDC project 2012-404: Wild Harvest Abalone National RD&E Planning, Management and Oversight. This Project 2012-404 was the management project for the inaugural ACA IPA. The Final Report for this project is available for [download here](#).

Coming Events

[View Calendar](#)

7th National Abalone Convention

Date: 29 July 2019 - 31 July 2019

State Industry bodies



**ABALONE INDUSTRY ASSOCIATION
OF SOUTH AUSTRALIA Inc.**
Working for a Sustainable Future



www.abalonecouncil.com.au

Abalone Council Australia update April 2019

1. New Strategic Plan 2018 – 2023 completed and uploaded to ACA website. www.abalonecouncil.com.au
2. Second Industry Partnership (IPA) with FRDC finalised – now manage 100% of FRDC Levy – abalone related R&D: \$3.5 million over 5 years
3. Final Report for inaugural ACA IPA has been uploaded to ACA website – this contains a full listing of all ACA managed projects for last 5 years
4. Independent Chairman appointed – Ian Cartwright
5. ACA has recently joined the peak national seafood body – Seafood Industry Australia.
www.seafoodindustryaustralia.com.au

Abalone Council Australia update April 2019

6. ACA has invested in the newly formed **Fight Food Waste CRC** – R&D investment in supply chain innovation – interest from Swisse re bio-active properties of abalone viscera
7. ACA and Abalone Growers Association of Australia (AGAA) partnered for a one day workshop in November 2018 to consider biosecurity, markets and marketing, disease management, ranching, climate change, future collaborative R&D opportunities
8. Abalone Marketing Levy – final versions of the investment prospectus and Consumer Education Program will be uploaded to www.abalonepal.com after Easter. Levy Ballot to be conducted in May/June 2019. Marketing levy forum – Hobart - date TBA
9. ACA hosted a 2 day “Abalone Fishery Management” workshop in March 2019 attended by State Fishery managers and abalone scientists – report following from Chairman Cartwright.....



Australasian Abalone Convention

Hotel Grand Chancellor
Hobart, Tasmania
29-31 July 2019



Trans Tasman Abalone Convention

THEME: Rebuilding the resource...

7th Convention hosted by ACA

- Australian and New Zealand stakeholders
- July 29 to 31, 2019
- Place: Hobart Venue: Grand Chancellor
- Welcome Reception MONA via ferry
- 2 days
- Similar format to the 2014 Convention in Queenstown, NZ



6th National Abalone Convention
August 6-8, 2014
Queenstown, New Zealand

Abalone industry

As the world's largest exporter of wild abalone, the industry is incredibly

News

Tasmanian Abalone Council News

About us

What does the Tasmanian Abalone Council do?

Members

You'll need to have your username and password to login and view this section

Tasmanian Abalone Council LTD > **News**

News

[Risks to the Tasmanian Abalone Fishery from further expansion of the Salmonid Industry October 2014](#)

[Tasmanian Abalone Council Submission re draft EMPC\(EL\) regs 2018](#)

[A Plan for Environmental Monitoring of abalone reef systems within the Lower D'Entrecasteaux Channel and Actaeons Reef Systems](#)

[A Plan to accelerate the removal of Centrostephanus rodgersii \(long spine urchin\) from Tasmania's East Coast](#)

Tasmanian Abalone Council Ltd Submission to the Draft Storm Bay North MFDP Nov 2017 – Feb 2018

Abalone Council submission re draft amendments to the Tasman Peninsula and Norfolk Bay MFDP January 2018

[Tasmanian abalone industry submission to the Sustainable Salmon Growth Plan September 2017](#)

[Commonwealth Department of the Environment and Energy re Tassal waste dumping October 2017](#)

[Letter to EPA re Tassal waste dumping October 2017](#)

On This Page

About abalone



Gallery



Videos



HAPPY FISHING!

Maintaining healthy abalone reef systems on Tasmania's East coast by:

(1) accelerating the harvest of *Centrostephanus rodgersii* and

(2) assisting the establishment of a commercially viable industry based on the sustainable harvest of *Centrostephanus rodgersii*



Report for the Tasmanian Abalone Council Ltd

May 2018

Prepared by Dean Lisson



Existing Centrostephanus Mitigation Program sponsored by TACL 2016/2017/2018

Main Objectives and outcomes to date:

- To remove Centro from productive abalone harvesting areas to 20m depth where incipient barrens may transition to extensive barrens if not “cleared”
- Where possible, collaborate with the “emerging” Tasmanian Urchin industry to build a long-term strategic approach to restoring and maintaining the ecological balance between abalone and urchin populations on the East Coast

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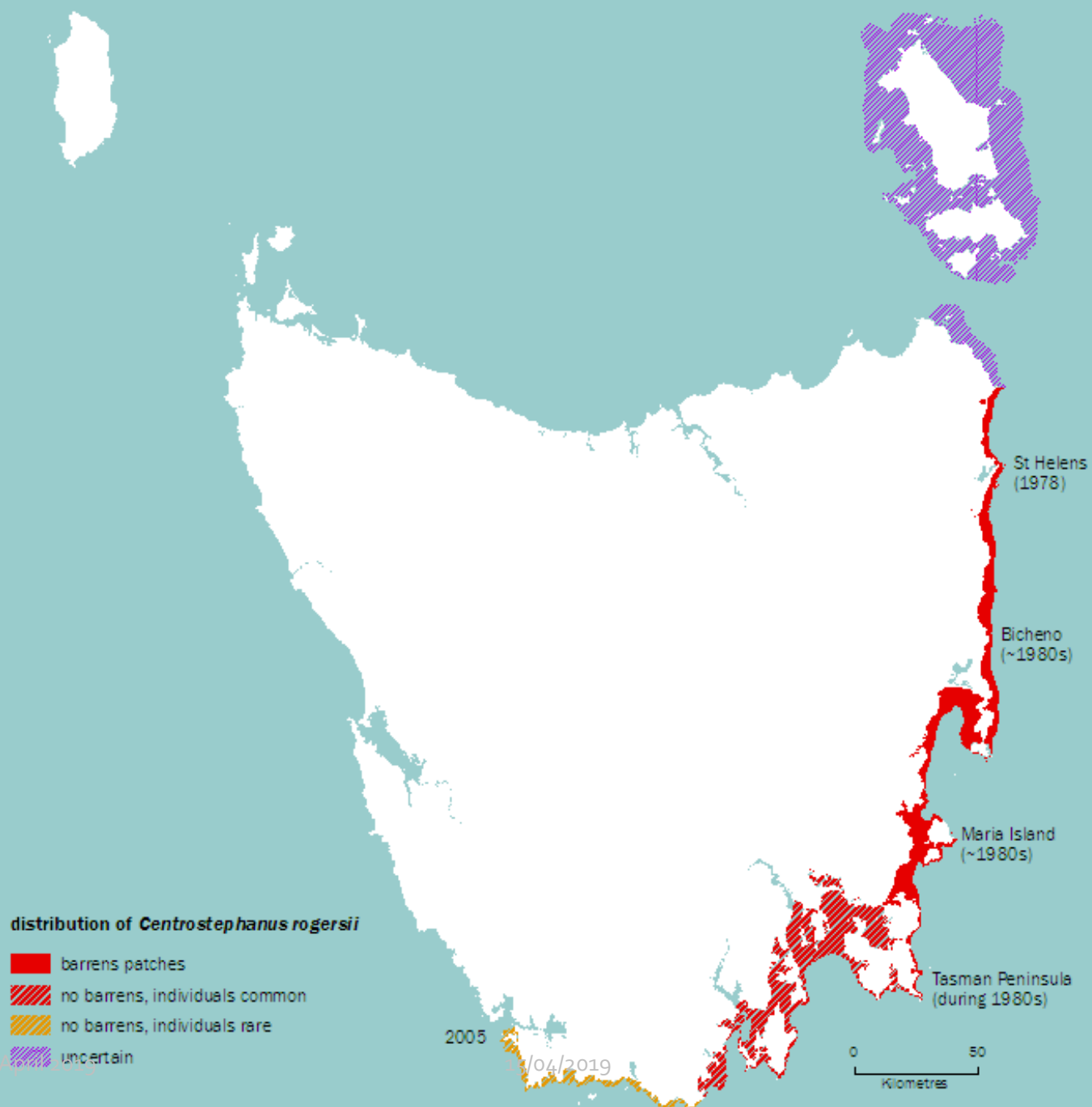
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From between St Helens/Bay of Fires region south to Maria Island.



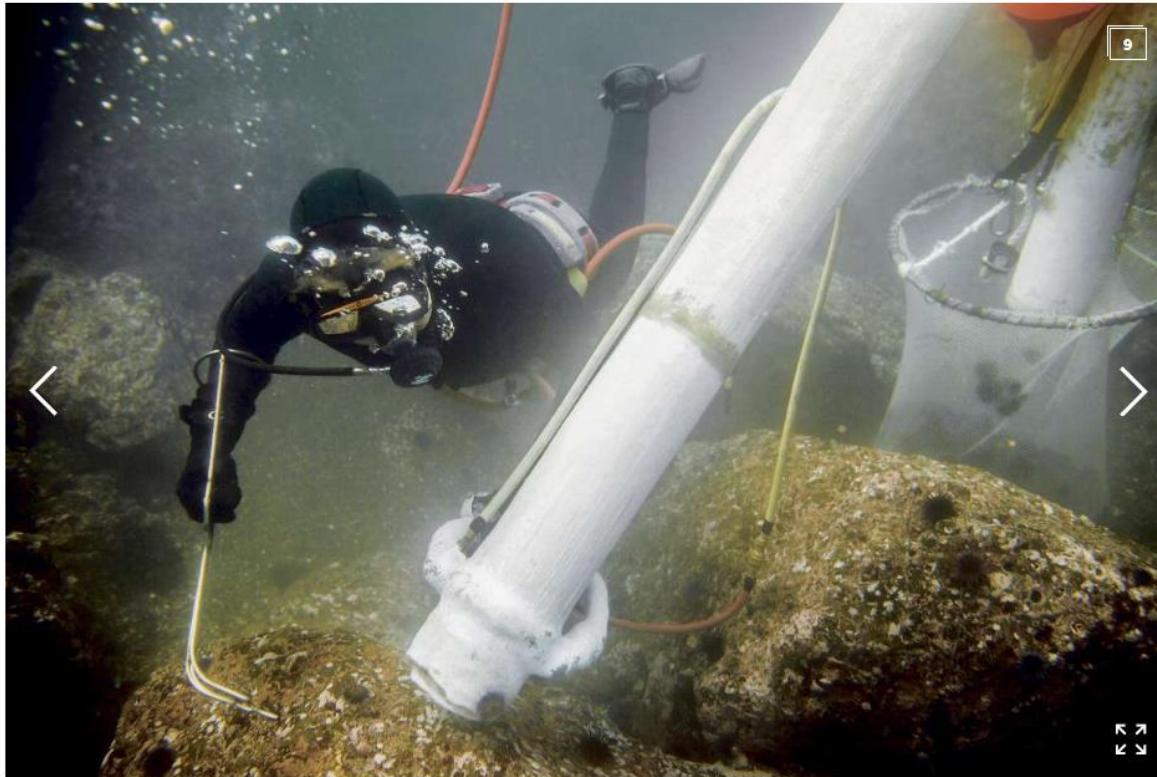
FOOD

Northern California divers battle to save abalone — with a giant sea-urchin vacuum


Tara Duggan

April 6, 2018

Updated: April 6, 2018 11:30 a.m.



1 of 9

Near Fort Bragg, Jon Holcomb clears purple sea urchins from the ocean floor using an urchin rake and an air lift.

Photo: Brian Feulner / Special to The Chronicle

Usually, the first weekend of April is when abalone divers pack up their wetsuits and fins and head off to campsites along the Sonoma and Mendocino coast. However, this year's recreational abalone season is closed due to a population on the brink of collapse, so the diving community has

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President Hillary Clinton.
Here's why it's not

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throwing Chihuahua to his
death from SF parking
garage

California gearing up for big
battle over rent control

Ultimate Guide: The 16 best
ice cream shops in the San
Francisco Bay Area

Scooter 'treasure hunt':
Nighttime chargers make
big money

Potential AIRF project - Stock Enhancement of the Eastern Zone abalone fishery – 22A to 31C

Potential Investment: \$2 million over 4 years

Three options to consider:

1. Translocation of mature abalone
2. Re-seeding using hatchery reared juveniles
3. Re-seeding using hatchery or locally produced larvae

Each option has pros and cons in terms of effectiveness and biosecurity risk.

Options 2 and 3 would involve changing a long-term policy of the TACL. This policy is not permitting genetic material from abalone farms into Tasmanian waters.

Potential Collaboration with Abalone Aquaculture sector.....

The success of stock enhancement around the world has been highly variable to date. Japan has been re-seeding for 40 years with mixed results.....

Additional considerations

It goes without saying that a comprehensive risk management plan from Biosecurity Tasmania would be required to mitigate potential risks for any larval seeding, juvenile seeding or translocation trials.

Ultimately, stock enhancement of areas depleted of wild abalones is an attractive proposition provided the medium to long-term returns exceed the costs and the disease and genetic risks can be identified and appropriately mitigated.

That said, there always remains the “no-risk option which is of course to reduce the commercial catch to very low levels and simply allow nature to take its course - this may be a much slower pathway to healthy productivity but at least the risks are truly minimal!

Environmental Monitoring of the Lower Channel and Actaeons Reef systems

Funded by IMAS

Joint initiative TACL and IMAS

Scotts Point, Lippies Pt, Sisters Bay, Partridge Island, Tower Bay, Lady Bay, Southport, Actaeons island, George III Reef

Abalone recruitment profiles (juvenile collector strings)

Sediment quantity and composition profiles (suspended trap collectors)

Rapid assessment reef health surveys (weed type and cover, substrate cover, sediment/dust, filamentous/green algae)

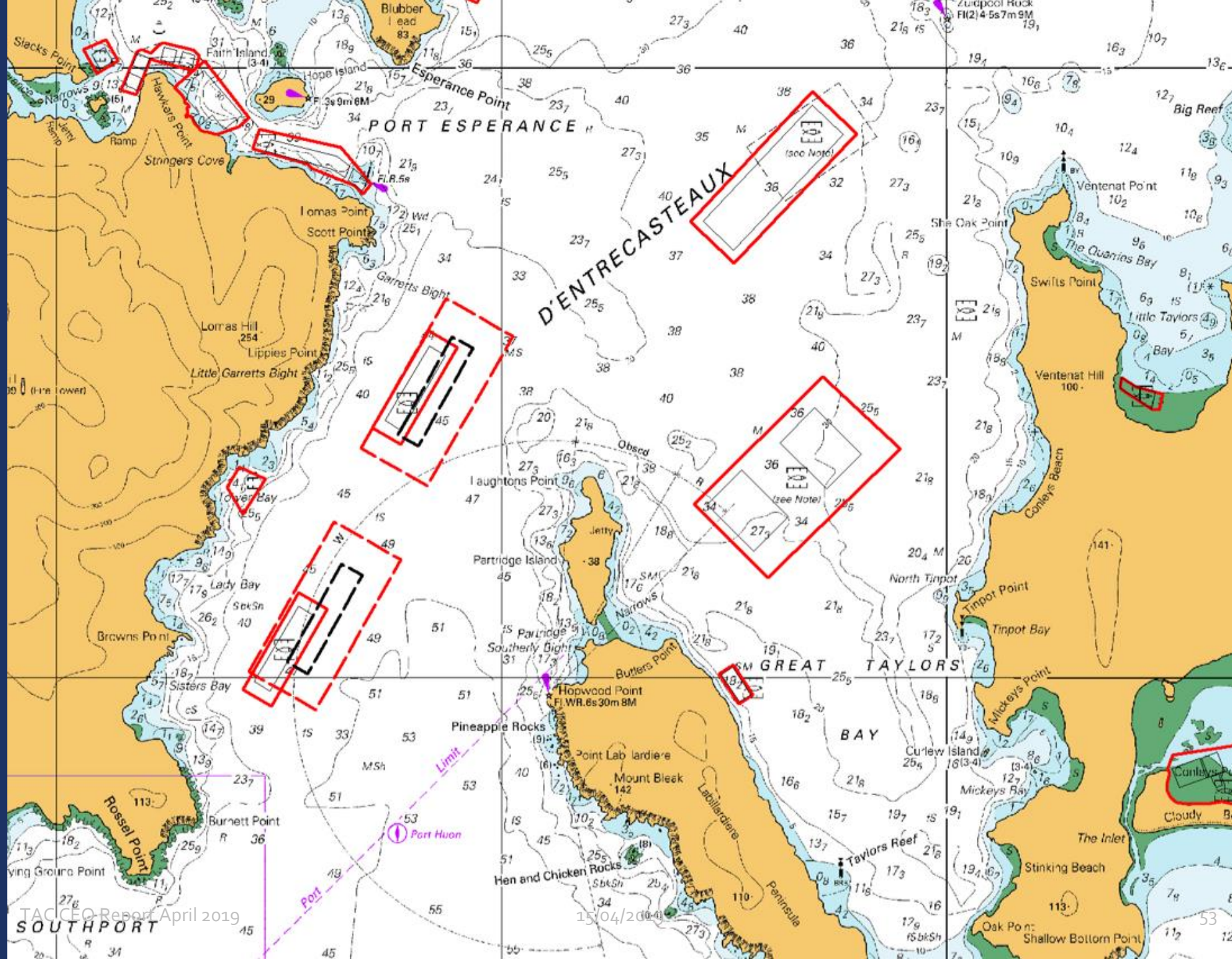
Water and sediment quality data

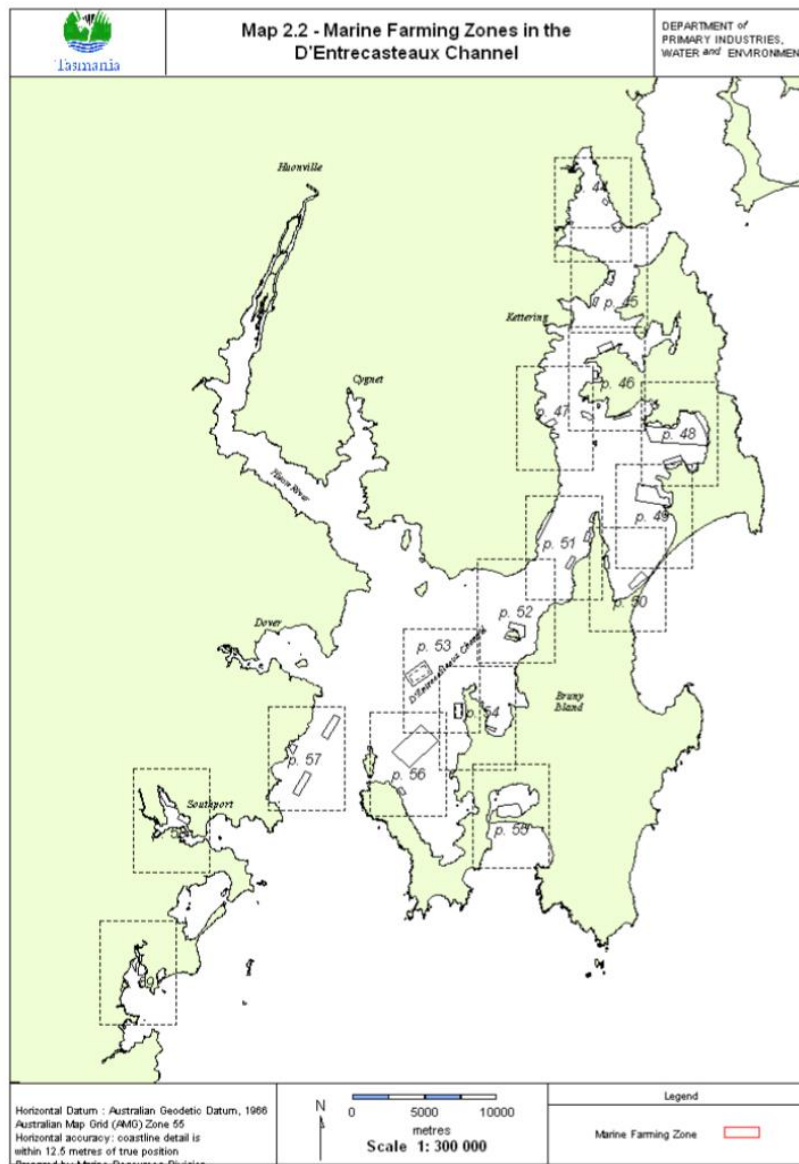
Abalone abundance surveys

Environmental Monitoring of abalone reef systems within
Eastern Zone fishing blocks 13 and 14
(Lower D'Entrecasteaux Channel and Actaeons Reef System)



Report for the Tasmanian Abalone Council Ltd
November 2017
Prepared by Dean Lisson





p 43

Environmental Monitoring of the Lower Channel and Actaeons Reef systems

Joint management committee TACL/IMAS

Meets twice per year to review datasets

Early detection of changes/ anomalies/ emerging trends

Where possible, abalone divers may be used for data collection

Trigger for regulatory response from Government/salmon industry

Template for inclusion within salmon EMP

Trans Tasman Abalone Convention

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Managing the future of the Australian Wildcatch Abalone Industry



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Coming Events

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7th National Abalone Convention

Date: 29 July 2019 - 31 July 2019

Abalone Council Australia

Key Stakeholders

- Tasmanian Abalone Council Ltd
- Abalone Industry Association of South Australia
- Abalone Industry Committee Victoria
- Abalone Association of NSW
- Western Australian Abalone Industry Association
- Abalone Association of Australasia (Exporters)
- Fisheries Research and Development Corporation

Research & Development



Abalone related Research Projects

Clicking on the title of the project will take you to the project detail on the FRDC website, including link to Final Report if project completed.

Funding Entity and project number	Project Title and link to Final Report	Principal Investigator	Organisation
FRDC 2018/061	ACA Planning and Management for a National Research, Development and Extension Program	Dean Lisson	ACA
FRDC 2018/004	SafeFish 2018-2021	Alison Turnbull	SARDI
FRDC 2017/225	Improving risk management of paralytic shellfish toxins in the Blacklip Abalone (Haliotis rubra rubra)	Alison Turnbull	SARDI
FRDC 2017/124	Developing a new five year Strategic Plan for RD&E Investment in the Australian Wildcatch abalone industry	Dean Lisson	ACA



Tasmania

Tasmanian Abalone Council Ltd

The Tasmanian Abalone Council (TAC) is the voice of the fishery, representing divers, non-diving quota-holders, processors and exporters. The council is proud that its members' far-sightedness has made the fishery a model for the rest of the world. The TAC is committed to further improvements through research and management initiatives.

Through sound management practice and skilled harvesting techniques, the Tasmanian Abalone Council has successfully translated natural advantages into sound economic gains, ensuring a bright future for the industry in Tasmania.

For more information on Tasmanian Abalone Council, visit their [website](#).

Total Allowable Catch

Each year the abalone Total Allowable Catch, known as the TAC, must be set for the next quota year - which is aligned to the calendar year.

An allowable catch needs to be set for each zone in the fishery, which together comprises the total allowable catch. Each of the 3,500 quota units then provides access to the same amount of abalone in each zone, and the fishery as a whole.

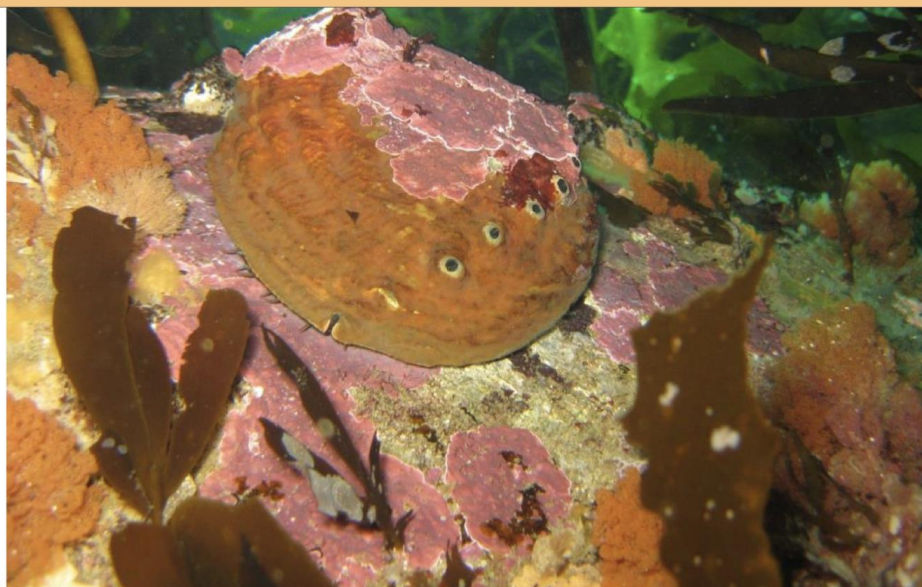
That is, the TAC set for a year is divided by 3,500 to determine the amount each quota unit provides for that year. As the TAC changes, the quota units are amended each year correspondingly.



**Abalone Council
Australia Ltd**

STRATEGIC PLAN 2018-2023

Abalone Council Australia Ltd
262 Argyle St., North Hobart, TAS 7000
Ph: +61 3 6169 2050
www.abalonecouncil.com.au



ACA Strategic Objectives 2018-2023

1. Healthy stocks maintained at biological optimums
2. Abalone stewardship - globally verified and promoted
3. A clear and harmonised Harvest Strategy in every state fishery
4. Higher productivity through innovation – pre and post harvest
5. A professional marketing program for the world's best abalone
6. Australia recognised as the global Home of Wild Abalone
7. Smart people using best practices
8. Team work across Australian abalone fisheries and users
9. An efficient ACA leading a national industry
10. Build social capital for industry benefit



Discover Australian Wild Abalone



Turning the tide

Investing in consumer education and promotion for Australian wild-caught abalone

The global market for abalone is more challenging now than it has ever been in the industry's history. There is an ever-increasing quantity and range of abalone products available to consumers worldwide. Australian wild-caught abalone products need to "stand-out from the crowd".

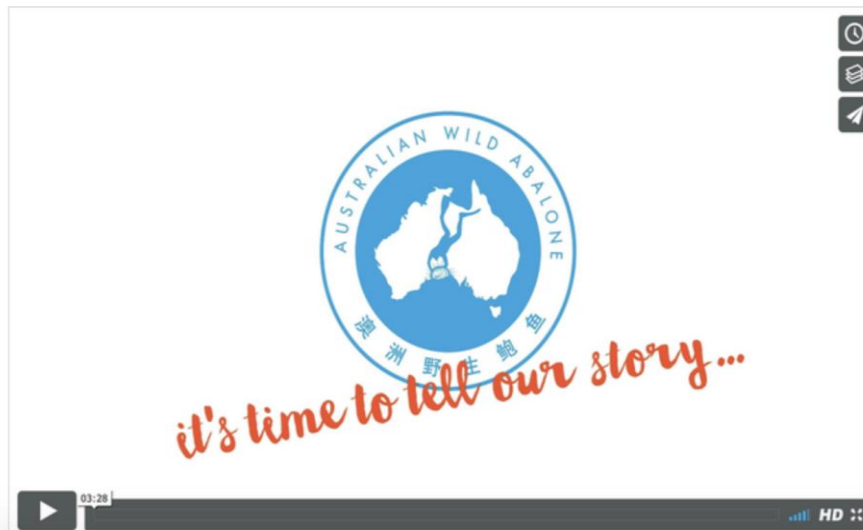
Click [here](#) for further information about the Australian Wild Abalone program.



[Home](#) ▾[Reports and Downloads - AWA Marketing Levy](#) ▾[What is the AWA Program?](#)[Contact](#)

Investing in Marketing

for the future of the Australian Wild Abalone Industry



Until around 2000 Australia was the dominant supplier of Abalone globally - with about 50% of market share. Due to the rapid growth of the Abalone aquaculture industry since then, Australian wild harvest Abalone now represents less than 3% of total global supply. With such a small market share it is now more important than ever for Australia to stand out from the crowd and ensure the future of the industry.

In order to effectively differentiate our product, the industry must



Turning the tide

Investing in consumer education
and promotion for Australian
wild-caught abalone

INVESTMENT ♦ PROSPECTUS

A decorative graphic featuring a stylized globe with white curved lines on a teal background. A small teal arrow points downwards in the top left corner, and a larger white arrow points towards the right in the middle right section.

Turning the tide

Australian Wild-Caught Abalone
Consumer Education and
Promotion Program

Levy Ballot

- *Levy Prospectus and Consumer Education and Promotion Program available for download from www.abalonepal.com*
- Electoral Commission preparations – October/November
- Poll to take place in November/December 2018
- Levy potentially in June 2019 (subject to Ministerial and Parliamentary approval)

www.abalonepal.com.au for information



www.abalonepal.com



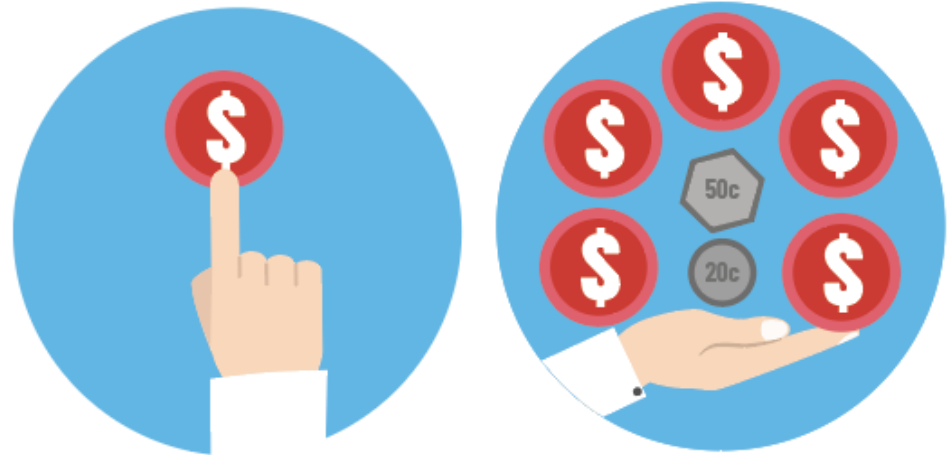
Australasian Abalone Convention

Hotel Grand Chancellor
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29-31 July 2019



Return on Investment

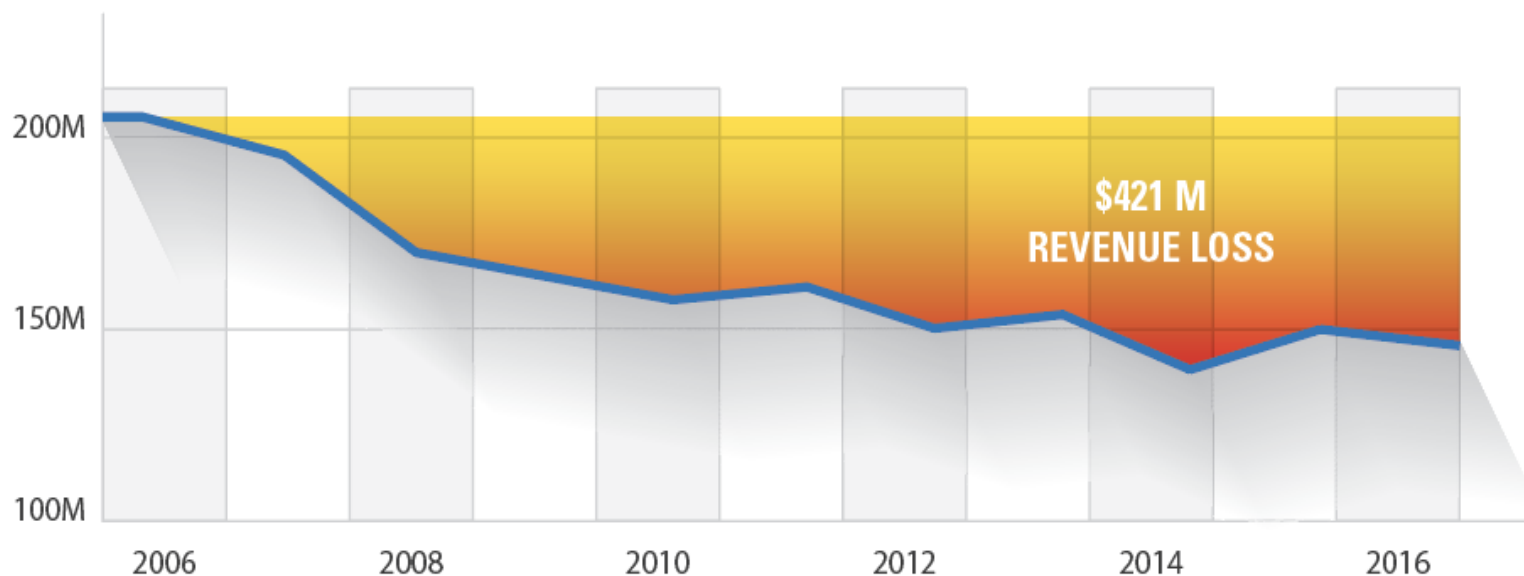
Quota owners will receive \$5.70 back for every \$1 invested over the five year period (the original \$1 plus \$4.70)



DECLINING PRODUCTIVITY AND REVENUE

VALUE OF AUSTRALIAN WILD-CAUGHT ABALONE INDUSTRY 2006–2016

There has been a 3% decline in industry revenue on average between 2006-2016



(SOURCE: ABARES 2017)

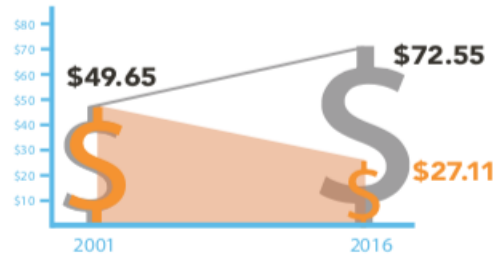
15/04/2019

DECLINE IN INFLATION ADJUSTED BEACH PRICE

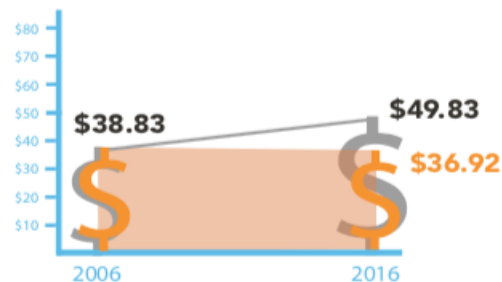
There has been a significant fall in inflation-adjusted beach prices in all five abalone-producing states since 2001. The following graphs summarise the situation in each state.

The following graphs illustrate how the beach prices in all states have not kept pace with inflation. The orange figures are the average beach prices expressed in nominal terms. The grey figures for 2016 show the price that should have been received IF the 2001 (or 2006 in the case of WA) beach prices had kept pace with inflation. In all cases there is a gap.

VICTORIA

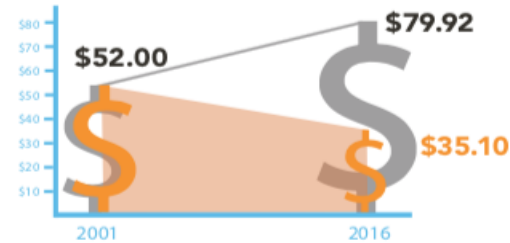


WESTERN AUSTRALIA

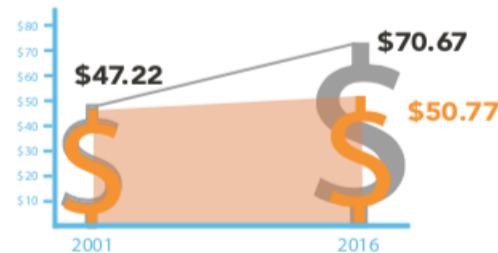


NOTE: WA price information only available from 2006. This data is for Greenlip and Brownlip only

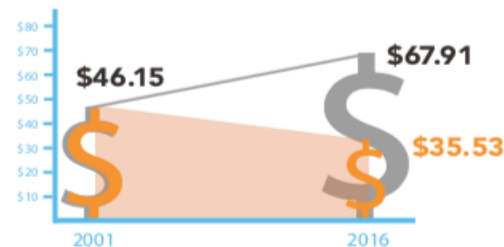
NEW SOUTH WALES



TASMANIA



SOUTH AUSTRALIA



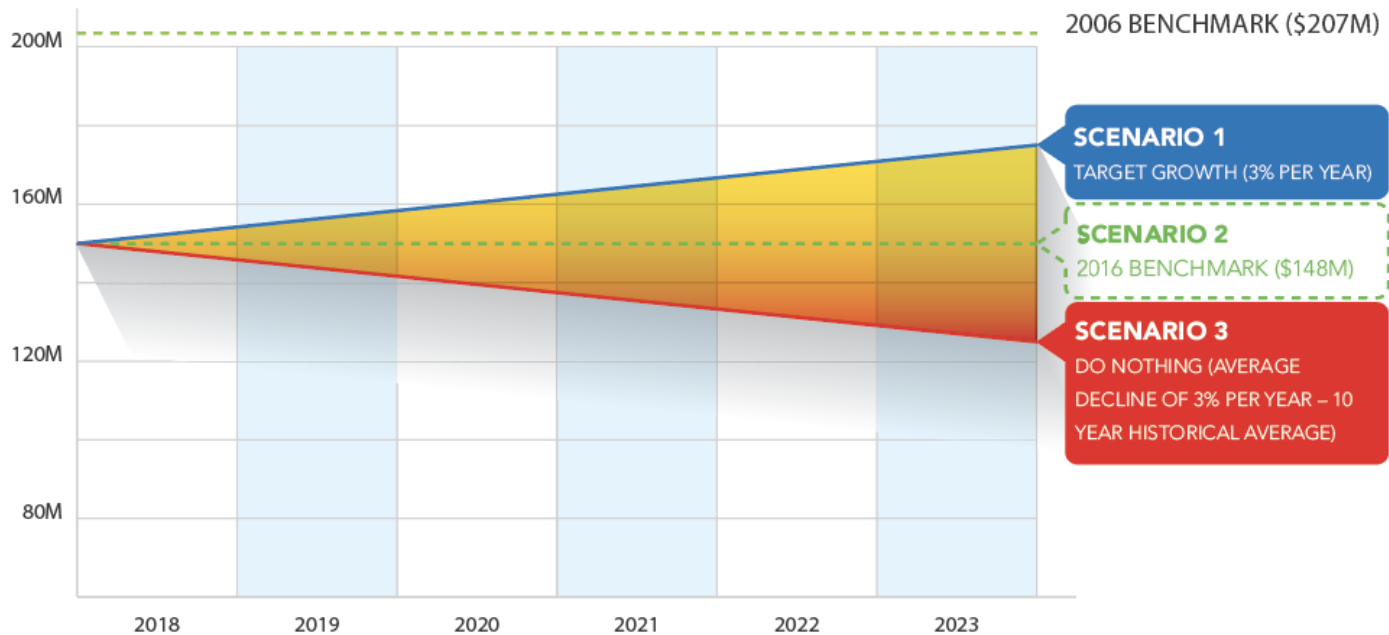
SOURCE: Data provided by abalone peak bodies in each state

Inflation adjusted prices based on Reserve Bank of Australia calculator

KEY

- Nominal Price
- Real Price (2001 price maintaining pace with inflation)

Target Growth



CONSUMER EDUCATION AND PROMOTION PROGRAM PILLARS

Working in all five markets the program will undertake activities to differentiate Australian wild-caught abalone as a special product worthy of a market premium.

PILLAR 1

AWA® TRADEMARK

Telling the
AWA® story

Nanotag and
fraud
protection

Licencing and
management

Managing and
monitoring use

PILLAR 2

GLOBAL MARKET ACCESS

Seafood Trade
Advisory Group

Safefish

New Market
indentification
and
development

PILLAR 3

CONSUMER AWARENESS AND ENGAGEMENT

Targeted
in-market
marketing
programs

Tourist/visitor
engagement
programs

Social media and
competitions

PILLAR 4

AWA® SUPPLY CHAIN ENTERPRISE SUPPORT

Supply chain
education and
engagement
program

Key influencer
engagement
program

E-commerce
platforms

PILLAR 5

CONSUMER INSIGHTS AND MARKET RESEARCH

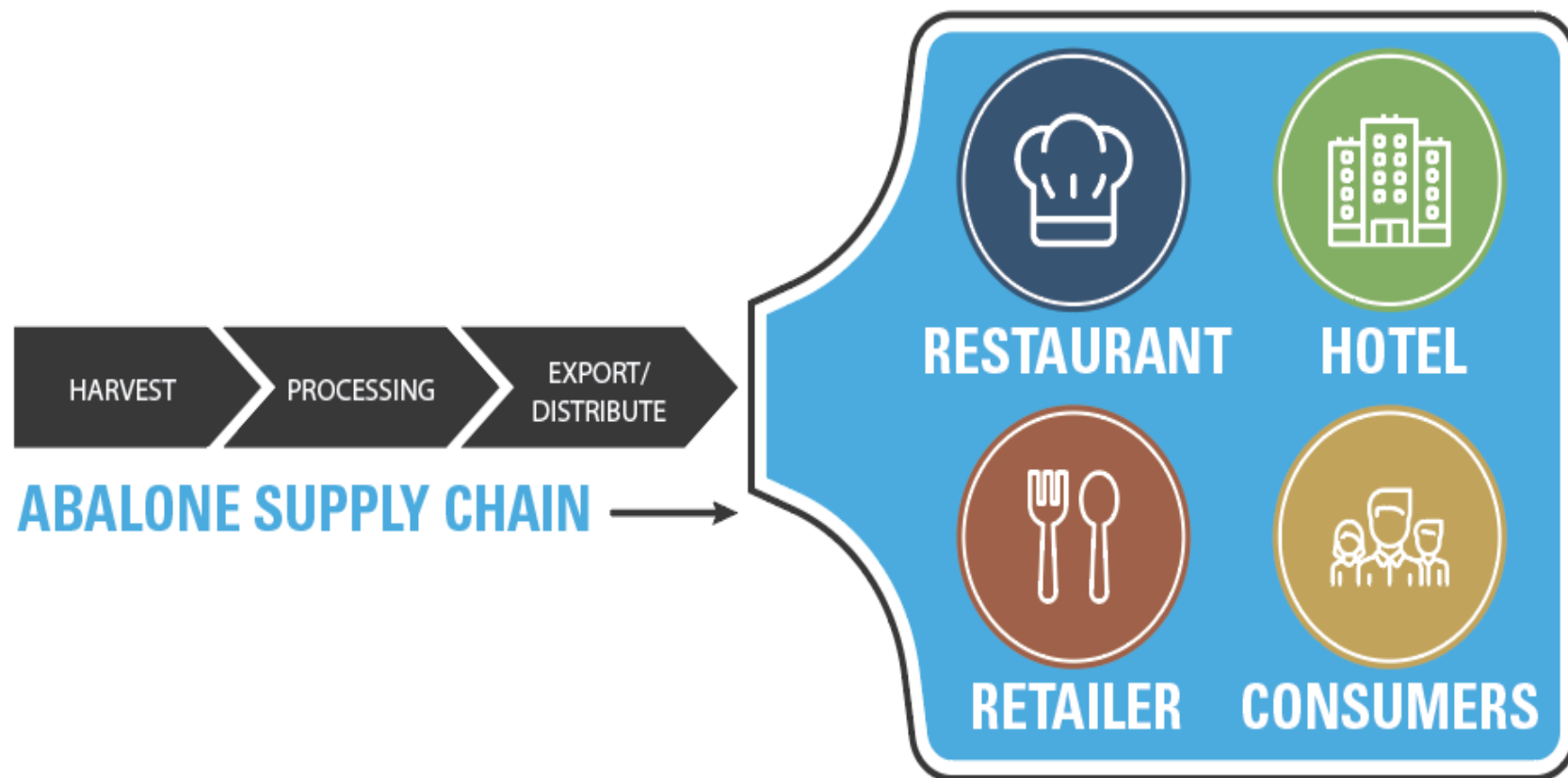
Marketing
impact

Consumer
insights

Supply chain
performance

Market
intelligence

AWARENESS AND PREFERENCE FOR AUSTRALIAN WILD-CAUGHT ABALONE WILL BE CREATED AT THE CONSUMER AND RETAILER END OF THE SUPPLY CHAIN.





KEY MARKETS

The value-growth trends in the five key markets provide new opportunities for Australian wild-caught abalone to reach current and develop new consumers.

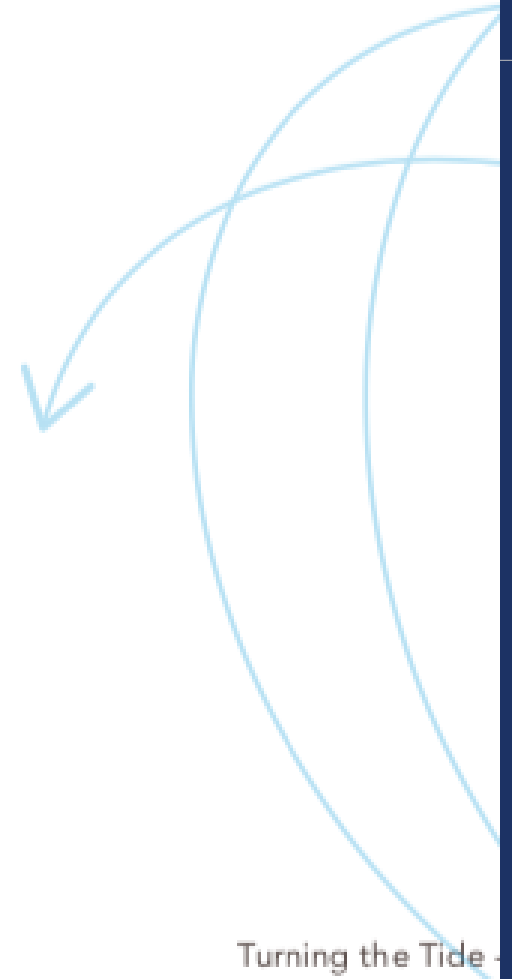
We have an opportunity to create abalone connoisseurs, much like wine connoisseurs, where consumers can impress their friends and family with their knowledge of premium abalone: Australian wild-caught abalone.

SUPPORT FOR INDIVIDUAL COMPANIES

The Consumer Education and Promotion Program will provide support to individual Australian wild-caught abalone businesses. This support will include:

- access to a market intelligence service;
- use of the Australian Wild Abalone® trademark (to qualified and approved businesses);
- access to marketing collateral (such as videos, photos, advertising copy) and resources; and
- profiling in consumer promotion campaigns.

The full plan can be downloaded from the Abalone Promotions Australia website (www.abalonepal.com).



Turning the Tide



ADVISORY COMMITTEE

The Fisheries Research and Development Corporation will establish an Australian Wild Abalone® Consumer Education and Promotion Program Advisory Committee.

The committee will comprise up to seven people with the skills, knowledge and experience to advise the Fisheries Research and Development Corporation on how the levy should be invested and to help the Corporation monitor and report on Program performance.

Role and function of the advisory committee

The Consumer Education and Promotion Program implementation plan has been developed during the levy consultation process. This plan will be provided to the advisory committee to guide its execution, with due regard to the strategic goal, the budget available and ongoing review of consumer insight and market research.

The committee will oversee and guide the annual planning, implementation and reporting process, ensuring opportunities for input from abalone industry and levy payers, and comprehensive performance reporting to all stakeholders.

The full Consumer Education and Promotion Program has been provided with the ballot documentation and hard copies are available from the Abalone Council Australia Ltd Secretariat (see contact details on page 34).

The Consumer Education and Promotion Program is also available at www.abalonenepal.com

Selection and appointment

There will be a widely circulated call for nominations (from within and outside the Australian wild-caught abalone industry) and selection will be undertaken by a committee comprising Abalone Council Australia Ltd and Fisheries Research and Development Corporation nominated persons. Selection will be based on agreed selection criteria and the constitution of the committee will ensure that all necessary skills, knowledge and experience are present. Recommendations will be made to the Fisheries Research and Development Corporation Board for approval.

The selection criteria will include knowledge and expertise in:

1. Planning and executing whole of industry marketing and promotion programs.
2. Planning and executing marketing and promotion activities in any of the key markets of China, Hong Kong, Australia, Japan, and Singapore.
3. Developing and managing brands, particularly high end luxury brands.
4. Consumer insight analysis and application to marketing programs.
5. Marketing program performance evaluation and reporting.
6. Stakeholder engagement and management.
7. Business planning and investment.

It is also expected that at least two members of the committee will have abalone industry knowledge and expertise (one from a production/ quota holder and one from an export/sales perspective).

An independent chairperson (someone with no financial or pecuniary interest in the Australian wild-caught abalone industry but who has experience with managing and implementing collaborative investments in market development) will be appointed jointly by Fisheries Research and Development Corporation and Abalone Council Australia Ltd. Each committee member will be appointed for three years .

TENDERING AND CONTRACT MANAGEMENT

All expenditure is to be made in accordance with:

1. The agreed Consumer Education and Promotion Program.
2. Fisheries Research and Development Corporation financial management policies related to tendering and contracting.

REPORTING

The Fisheries Research and Development Corporation will be responsible for all reporting.

The reports will be provided annually to all investors and will include information detailing:

- expenditure against budget;
- effectiveness of the Consumer Education and Promotion Program activities (see section on performance measurement); and
- any planned changes to activities for subsequent years.

All investors will receive annual reports that will include details of the activities undertaken in each market as well as information about the effectiveness and impact of those activities. The annual report will also provide progress reports against the performance targets outlined in this prospectus

Abalone Council Australia Ltd will also provide regular updates via regular newsletters and updates. From time to time, face-to-face consultation meetings will be held by Abalone Council Australia Ltd directors, such as at state peak body annual general meetings to enable direct investor input to the Program.

The Fisheries Research and Development Corporation will produce an annual levy report to be presented to the abalone industry and the Department of Agriculture and Water Resources.

CHANGING OR CEASING THE LEVY

The Consumer Education and Promotion Program will be conducted for five years because experts advise that this is the minimum time before substantive changes in consumer behavior will occur.

Quota owners will always have the power to alter the investment amount by requesting that another national vote be conducted. This includes the ability to stop the investment completely at any stage during the next five years.

Note that changing the levy or ceasing requires legislative amendments and changes must be in line with '**Levy Principle 12: Amendments to existing levies**' which states the following.

The proposed change must be supported by industry bodies or by levy payers or by the Government in the public interest. The initiator of the change must establish the case for change and where an increase is involved, must estimate the additional amount which would be raised. The initiator must indicate how the increase would be spent and must demonstrate the benefit of this expenditure for levy players.

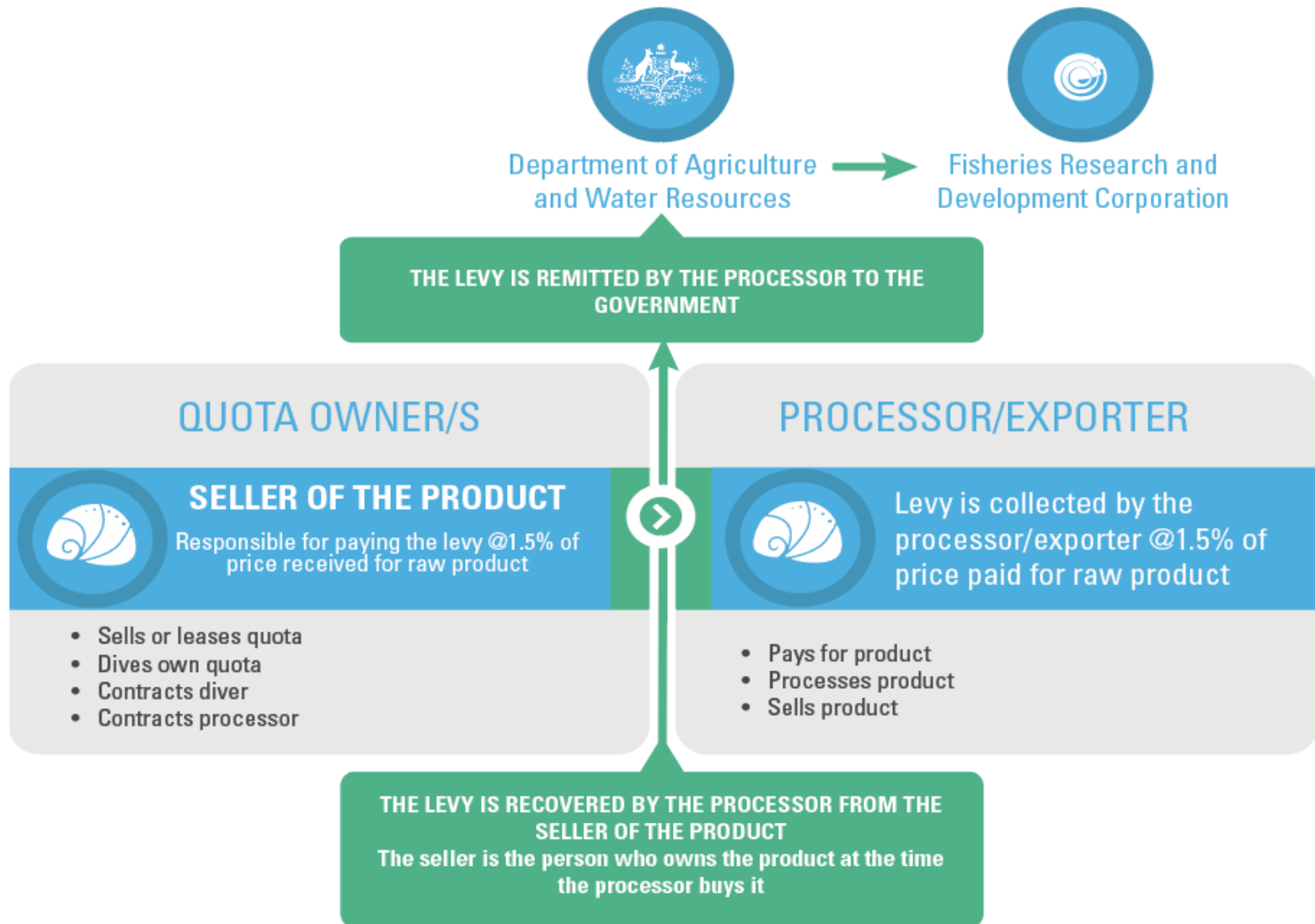
In any event, after five years another ballot will be conducted to decide whether to continue investing in a collaborative Consumer Education and Promotion Program.

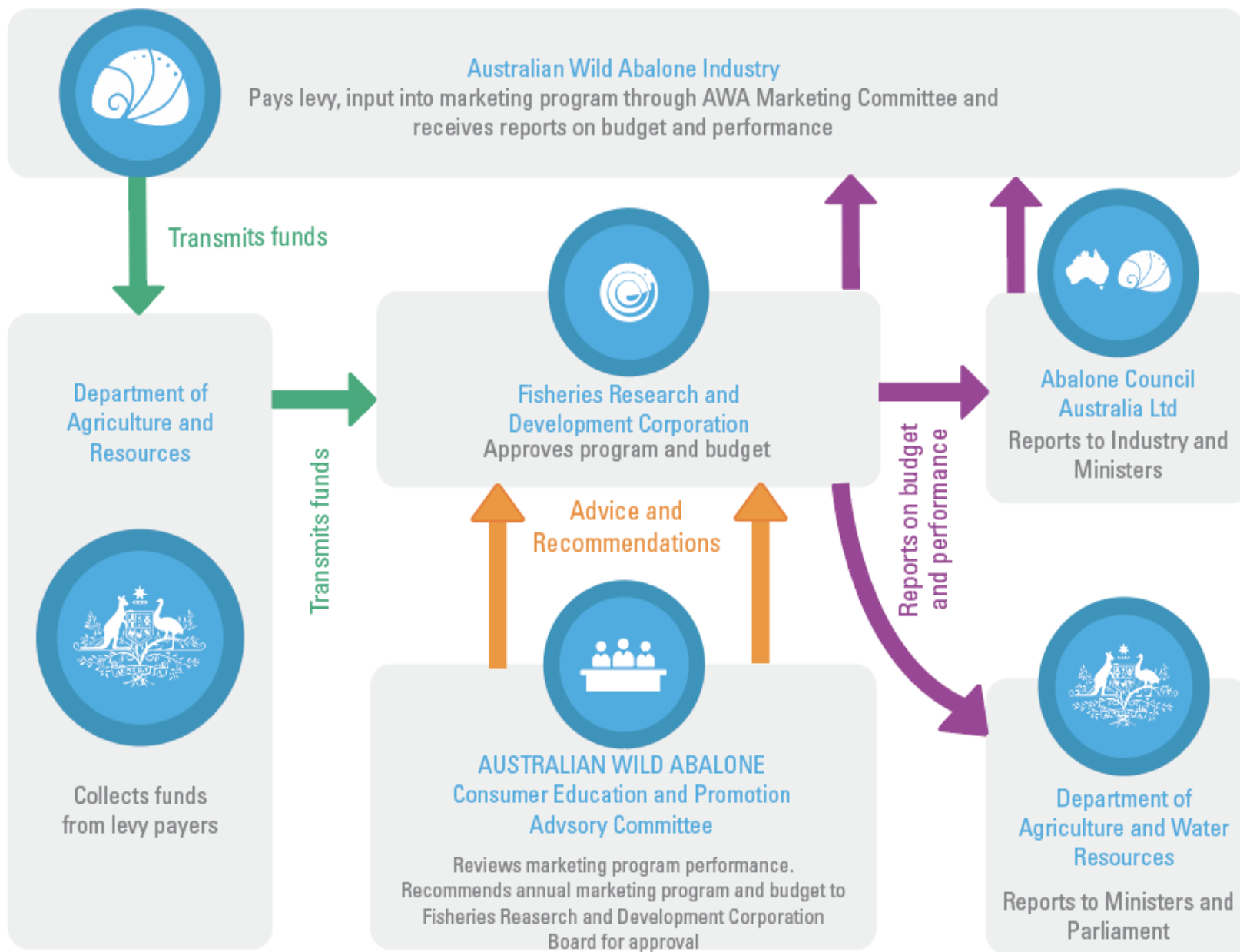
AUSTRALIAN WILD ABALONE® 5 YEAR BUDGET SUMMARY

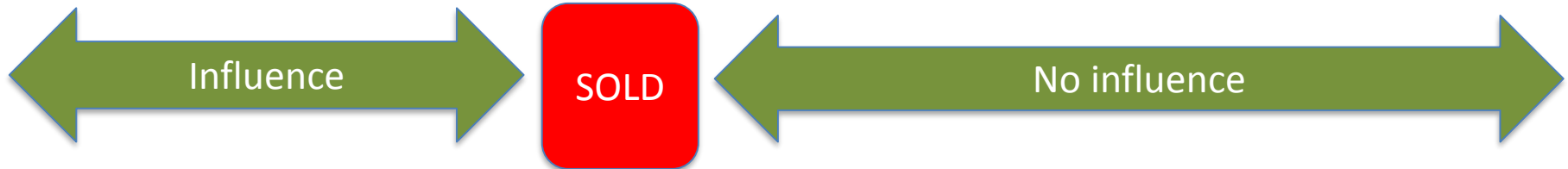
ACTIVITIES	5 YEAR BUDGET
In-market consumer education activities and abalone enterprise promotion support in China, Hong Kong, Australia, Japan and Singapore	\$7,500,000
AWA Trust mark administration management and cross-market coordination (includes collateral development, some content creation and translation costs)	\$2,500,000
Levy administration: Fisheries Research and Development Corporation	\$ 500,000
Department of Agriculture and Water Resources	\$ 220,000
Opportunity and contingency fund	\$1,280,000
Total	\$12,000,000

Spreading investment across all five markets will provide benefits to all stakeholders

Levy collection point







Role of AWA[®] Program
Create an awareness and preference for Australian Wild Abalone products at this end of the supply chain

Role of AWA[®] Program



首页

产品

舌尖的享受

捕鱼师

关于AWA

联系我们



www.candyabalone.com



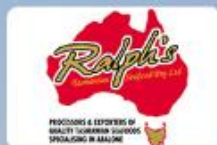
www.westernabalone.com.au



www.tasmaniaseafoods.com.au



www.streakybayseafood.com.au



www.ralphstasmaniaseafood.com.au



www.hotdogfisheries.com.au



www.eyrewoolfabalone.com.au



www.abalone.com.au



www.doverfisheries.com.au



www.craigmostyn.com.au



www.blueskyfisheries.com.au

Kansom Pouches Brisbane Airport





黑边鲍鱼

生长在澳大利亚南部各地沿海的礁岩中，
生长于南澳、塔斯马尼亚、维多利亚和
新南威尔士州海域。

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寻迹鲍鱼

澳洲野生鲍鱼的生长分布，决定了其的品类。
不同鲍鱼的品类，更有其独特的风味。

[了解更多](#)

寻迹鲍鱼

多种野生鲍鱼品类，
构成澳洲鲍鱼的独特之处。

[了解更多](#)

舌尖的享受

卓越品质遇上大师巧做
领略舌尖上的曼妙滋味

[了解更多](#)

微博



AWA V 上海

[+ 加关注](#)

#About AWA 澳大利亚野生鲍鱼标志(AWA)代表着世界上最高质量的野生鲍鱼。澳大利亚鲍鱼出口商必须遵循AWA的质量保障守则，才可以在他们产品的包装上展示AWA标志，表明其品质可信。



从海洋到你

澳洲野生鲍鱼对生长环境极为挑剔，唯有生长在鲨鱼出没的水域的鲍鱼，才能确保其天然的野鲜味。

[了解更多](#)

寻迹鲍鱼

多种野生鲍鱼品类，构成澳洲鲍鱼的独特之处。

[了解更多](#)

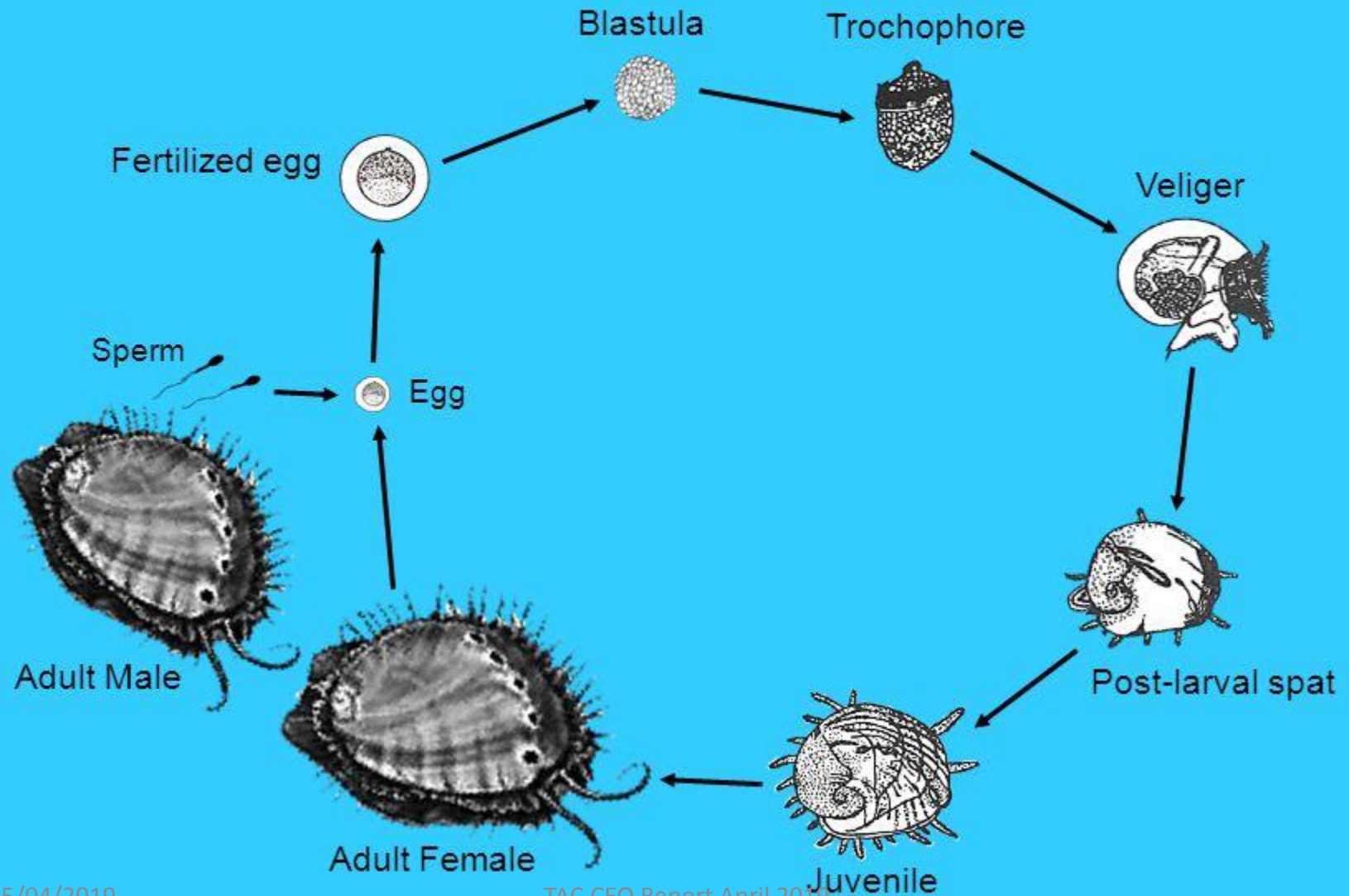
舌尖的享受

卓越品质遇上大师巧做，领略舌尖上的曼妙滋味。

[了解更多](#)

The End

Abalone life cycle



Option 3: Re-seeding using hatchery reared juveniles

The use of hatchery reared juveniles for re-seeding may have some efficiency and cost advantages over larval seeding provided the bio-security risks are comprehensively identified and properly mitigated. It might be that release of 30mm to 40mm juveniles is a more cost effective strategy (as compared with larvae), *but we need to properly consider the risk of transferring a farm-based pathogen to the wild.*

The juveniles would be propagated using broodstock that had been harvested from the same reef location nominated for stock enhancement.

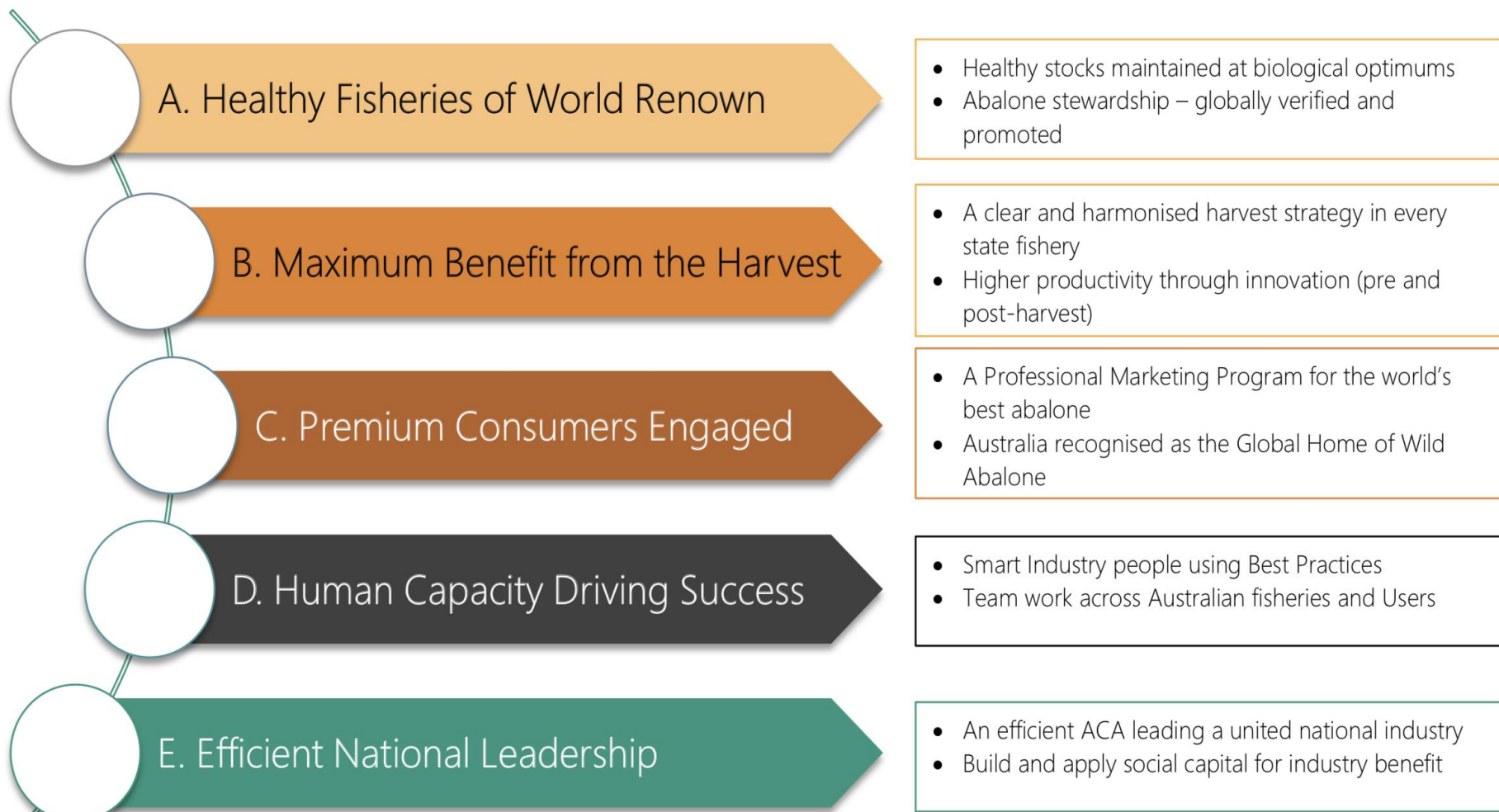
Measuring success

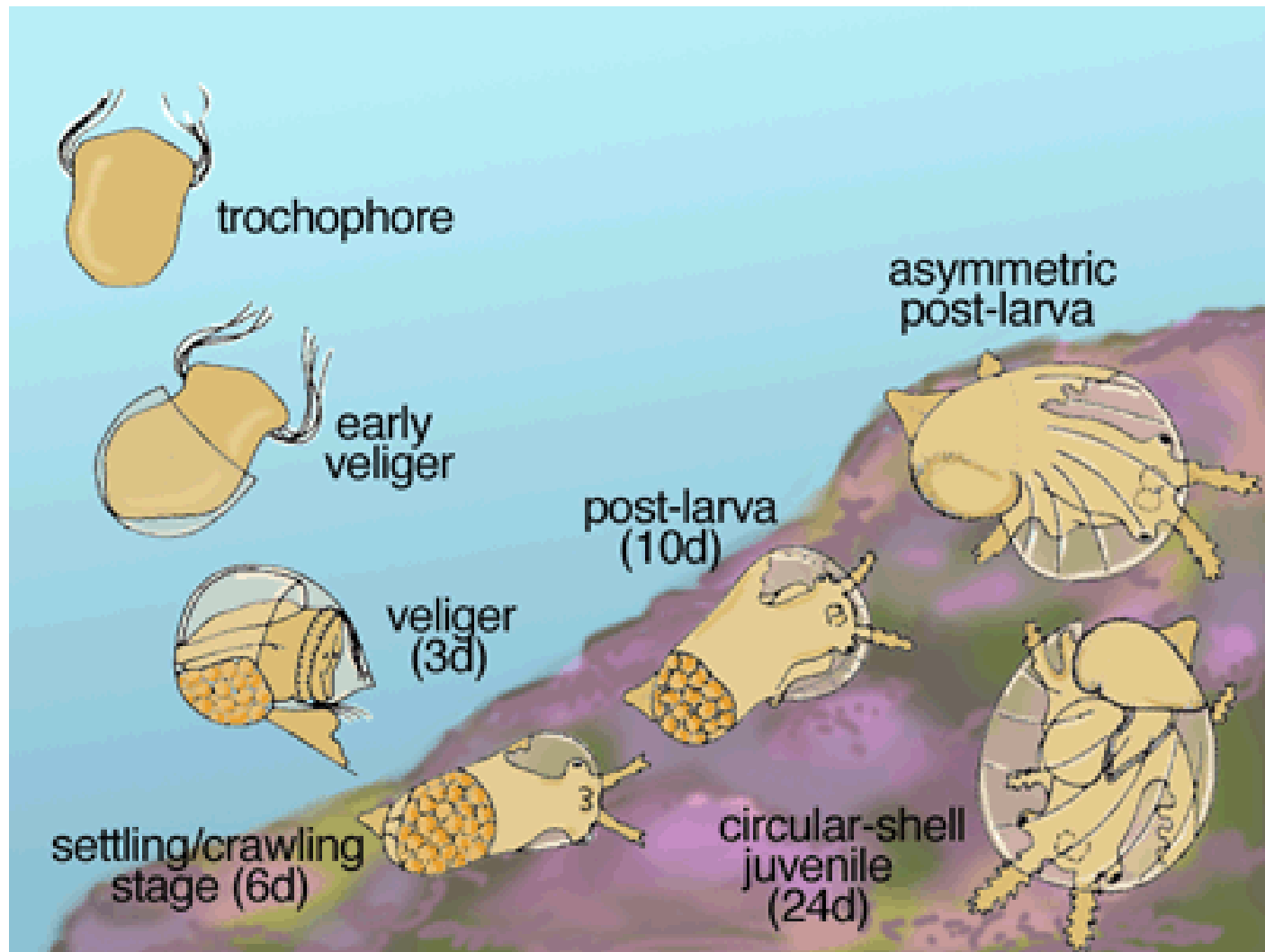
By establishing juvenile collectors in good habitat where abalone are depleted, and then reseedling the area with larvae will be the fastest way to confirm the collectors work, but also that the reseedling is working. Previous larval and/or juvenile seeding trials haven't used much in the way of either larval or juvenile collectors to quantitatively measure the success of whatever enhancement methodology they were trialling.

Goals and Strategies

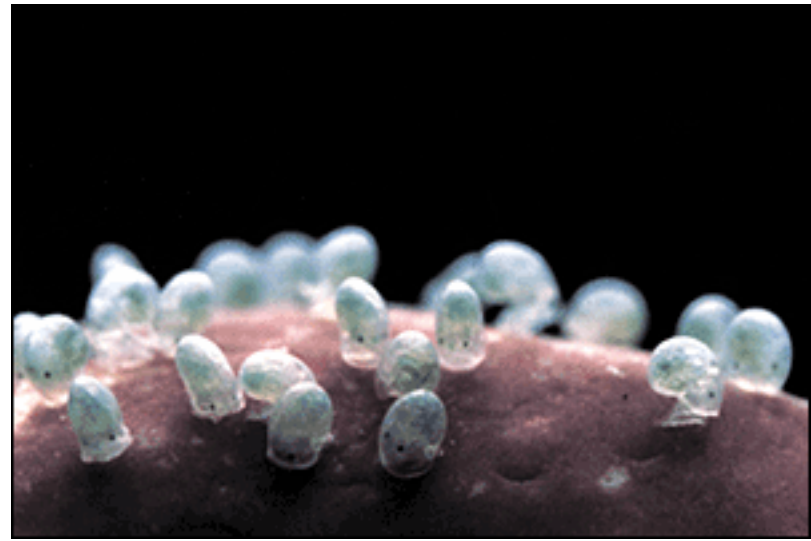
GOALS AND STRATEGIES

ACA is the global supplier of premium wild Abalone. Our strategic landscape will be framed by the following Goals and Strategies.





Option 2:Larval Seeding



- Lower risk stock enhancement option
- Mobile Tanking system mounted on board a vessel
- Harvest male and female abalones and place in tank and induce spawning
- Wait about a week then carefully pump larvae from boat down to suitable habitat
- Enhances natural recruitment processes

Stock Enhancement within the eastern zone

Option 1: Translocation of mature abalone

Mundy project: Seafood CRC project 2005/029

Key findings:

A “nearby” adequate source of mature abalones is required -

May be feasible to re-establish abalone populations within localized, discrete reef systems

Translocation is only likely to be economically feasible at small scales

Biosecurity risk is very low

Total Australian Production has declined by 35% since 2011

State	TACC in tonnes 2011/2012	TACC in tonnes 2017/2018
Tasmania	2366.00	1333.50
South Australia	834.40	717.50
Victoria	806.40	595.30
Western Australia	349.40	143.40
New South Wales	94.00	100.00
TOTAL	4450.20	2889.70 (35% reduction in 6 years)

NZ: 1250 t in 2001/02
 918 t in 2011
 706.7 t in 2018 (23% reduction)

Abalone Council Australia update April 2019

1. New Strategic Plan 2018 – 2023 completed and uploaded to ACA website. www.abalonecouncil.com.au
2. Second Industry Partnership (IPA) with FRDC finalised – now manage 100% of FRDC Levy – abalone related R&D: \$3.5 million over 5 years
3. Final Report for inaugural ACA IPA has been uploaded to ACA website – this contains a full listing of all ACA managed projects for last 5 years
4. Independent Chairman appointed – Ian cartwright
5. ACA has recently joined the peak national seafood body – Seafood Industry Australia. www.seafoodindustryaustralia.com.au

Abalone Council Australia update April 2019

6. ACA has invested in the newly formed Fight Food Waste CRC – R&D investment in supply chain innovation – interest from Swisse re bio-active properties of abalone viscera
7. ACA and Abalone Growers Association of Australia (AGAA) partnered for a one day workshop in November 2018 to consider biosecurity, markets and marketing, disease management, ranching, climate change, future collaborative R&D opportunities
8. Abalone Marketing Levy – final versions of the investment prospectus and Consumer Education Program have been uploaded to www.abalonepal.com Ballot to be conducted in May 2019
9. ACA hosted a 2 day “Abalone Fishery Management” workshop in March 2019 attended by State Fishery managers and abalone scientists

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