



Improving market transparency in perishable agricultural goods industries

Seafood industry first workshop 10 August 2021: Workshop communique

Background

In late 2020, the Australian Competition and Consumer Commission (ACCC) conducted an inquiry into bargaining power imbalances in supply chains for perishable agricultural goods (PAG) in Australia. The inquiry recommended that the government explore measures to increase price transparency in PAG industries to increase competition in those industries.

In response to this recommendation, the Australian Government, through the Department of Agriculture, Water and the Environment (DAWE) has committed \$5.4 million to improve price and market transparency in PAG industries by:

- delivering co-design workshops with PAG industries to understand their market transparency issues, opportunities and requirements
- delivering a grants program to develop and implement tailored mechanisms to improve price and market transparency.

The workshops provide an opportunity for participants to discuss price and market transparency issues in their sector, brainstorm ideas to improve transparency and co-design the details of solutions going forward.

Workshop outcomes

Twenty-four industry and government representatives attended the first seafood price and market transparency workshop. The objective of the first workshop was to discover and analyse the issues, barriers and opportunities to achieve market and price transparency in the seafood industry.

Participants ([Appendix A](#)) worked in small groups that explored:

- Issues – Negative characteristics within the seafood industry that decrease price and market transparency.
- Barriers – Negative characteristics external to the seafood industry that decrease price and market transparency.
- Internal opportunities – Positive characteristics that exist within the seafood industry that can potentially increase price and market transparency.
- External opportunities – Positive characteristics outside the seafood industry that can potentially increase price and market transparency.

Throughout this process, issues and barriers (and consequently, opportunities) were categorised as either legislative, regulatory, industry specific, general process, technology driven, consumer driven and other (for example, environmental). Table 1 identifies and categorises the key themes of issues, barriers and opportunities from the workshop discussions.

Table 1 Issues, barriers and opportunities

Category	Issue/Barrier	Opportunity
Consumer	Lack of consumer awareness of the benefits and positive characteristics of Australian seafood; pricing for consumers based on their perception of value; truth in labelling/origin.	Increased consumer education to improve transparency of country/region of origin; increased consumer awareness of positive characteristics, such as environmental sustainability and nutritional benefits.
Industry specific	Industry credentials not promoted; wholesaler dominance; lack of trust between members of the supply chain; certification requirements, policy and regulation differ across state governments and retailers; supply models differ across retailers; lack communication with retailers.	Increasing the scope and application of the SIA pledge, HARPS (Harmonised Australian Retailer Produce Scheme) could be considered for the seafood industry.
Technology driven	Producers are price takers and have no say in value of their product; labelling and branding of seafood can be difficult; no visibility of domestic production costs versus imported production costs.	Digital tools: industry e-commerce; social media; traceability; digitisation of supply chains, including blockchain
General process	Lack of price sharing; no trade information on supply and price; lack of standards (size, quality); lack of farm management tools; lack of market understanding (composition); data not available in a timely way.	Improved collection, storage and dissemination of timely market information: more informed price and market data to inform better decision making; targeted marketing.

Next steps

The outcomes of the first workshop provide the basis for generating ideas for potential solutions to improve price and market transparency in the seafood industry. Ideas generation will be co-designed by participants in Workshop 2 on 7 September 2021.

Appendix A: Participant list

- Humpty Doo Barramundi
- Petuna
- Sydney Fish Markets
- Southern Rock Lobster
- Australian Barramundi Farmers Association
- Western Rock Lobster Council
- Oysters Australia
- SA Oyster Growers
- Tasmanian Salmon Growers Association
- Geraldton Fisheries Group
- NSW Professional Fishermen's Association
- Woolworths
- Seafood Industry Australia
- Fisheries Research Development Corporation
- Australian Competition and Consumer Commission
- DAWE Fisheries Branch
- DAWE Agricultural Policy Division

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