

# Australian Council of Prawn Fisheries Research and Development Strategic Plan



**Project No. 2005/308**  
**June 2006**



**Australian Government**  
**Fisheries Research and  
Development Corporation**



Australian Council of Prawn Fisheries Research and Development Strategic Plan.

Samara Miller

FRDC 2005/308

Published by Australian Council of Prawn Fisheries Ltd.

ISBN 978 0 646 47700 8

### **Copyright**

© Fisheries Research and Development Corporation and Australian Council of Prawn Fisheries. 2006

This work is copyright. Except as permitted under the Copyright Act 1968 (Cwlth), no part of this publication may be reproduced by any process, electronic or otherwise, without the specific written permission of the copyright owners. Neither may information be stored electronically in any form whatsoever without such permission.

### **Disclaimer**

The authors do not warrant that the information in this book is free from errors or omissions. The authors do not accept any form of liability, be it contractual, tortious or otherwise, for the contents of this book or for any consequences arising from its use or any reliance placed upon it. The information, opinions and advice contained in this book may not relate to, or be relevant to, a reader's particular circumstances. Opinions expressed by the authors are the individual opinions of those persons and are not necessarily those of the publisher or research provider.

---

## Table of Contents

1. Non-Technical Summary .....	5
2. Acknowledgments .....	7
3. Background.....	8
4. Need .....	9
5. Objectives .....	10
6. Methods .....	11
6.1    Industry Analysis .....	10
6.2    Strategic Directions .....	10
7. Discussion.....	13
7.1    Industry Analysis.....	12
7.2    Strategic Directions .....	13
8. Benefits & Adoption .....	17
9. Further Development .....	18
10. Planned Outcomes .....	19
11. Conclusion .....	20
12. Bibliography .....	21
Appendix 1 – Intellectual Property .....	22
Appendix 2 – Project Staff .....	23

<b>FRDC 2005/308</b> Australian Council of Prawn Fisheries Research and Development Strategic Plan
--

**PRINCIPAL INVESTIGATOR:** Ms Samara Miller  
**ADDRESS:** Australian Council of Prawn Fisheries  
PO Box 8  
Port Lincoln SA 5606

**OBJECTIVES:**

1. To establish an Australian Prawn Fisheries Research and Development and Strategic plan.
2. To ensure effective communication and consultation across the industry about the establishment of the plan.

# 1. Non-Technical Summary

## Outcomes Achieved to Date

The establishment of a new national body, the Australian Council of Prawn Fisheries, has been a significant outcome that is supported by individual fishers through to vertically integrated companies involved in the catching and selling of wild catch prawns. This body represents the Australian wild-catch prawn industry and strengthens the communication, dialogue and working together between the wild-catch prawn fisheries. The potential for cost savings and efficiencies to be realized between the prawn fisheries has a real chance of occurring with the development of this national council.

This project has delivered significant outcomes to the wild-catch prawn industry such as:

- The 'first of its kind' comprehensive analysis of the industry currently
- An appreciation and understanding of the obstacles facing the Australian wild-catch prawn industry and ways to overcome them
- A national research and development strategy which clearly supports long term industry development
- A more efficient process for planning, managing, funding and monitoring research projects as they are linked to a wider national strategic plan
- The potential for continuous improvement in research and development within the industry given the greater level of coordination across the industry and stakeholders
- Clearer articulation of the strategies that the prawn sector wishes to pursue in the future and their coordination
- Strengthening of the dialogue with State and Commonwealth government agencies by industry
- The development of a comprehensive database of contacts and website to improve and increase the communication across the wild-catch prawn industry

An analysis of the current situation and performance of the Australian wild-catch prawn industry has identified that the industry has a clear-cut sustainable competitive advantage, and that investment is needed to maximize this advantage and secure a profitable future for the industry.

The project developed strategic directions for the industry over the next ten years which will invest in improving the price of the product, secure the volume of the prawns harvested and reduce costs to the industry. If one, two or all of these areas are invested in, profitability for the industry will improve.

Strategic directions for a new national body, Australian Council of Prawn Fisheries, representing the industry were also developed focusing on communication, funding and administration to ensure that the ACPF could deliver on these investment areas over the coming years.

In conclusion, the project has been pivotal in moving the Australian wild-catch prawn industry forward in terms of setting it up for improved growth into the future.

**Keywords**

Prawns, Australian Council of Prawn Fisheries, Prawn fisheries, Strategic Plan.

## 2. Acknowledgments

The Australian Council of Prawn Fisheries thanks the Department of Agriculture, Fisheries and Forestry and the Fisheries Research and Development Corporation for funding this project. The following seafood companies contributed funding to develop strategic directions for the industry:

- MG Kailis Group, Western Australia
- Newfishing Australia Pty Ltd, Western Australia
- Norwest Seafood, Western Australia
- Spencer Gulf and West Coast Prawn Fishermen's Association, South Australia

The following people are sincerely thanked for their contribution to the project as Steering Committee members and Directors on the ACPF who were passionate in planning strategically for the industry and setting the directions for the next ten years. Their time was given freely to the project over many months.

- David Crichton, A Raptis and Sons, Queensland
- Barry Evans, Spencer Gulf and West Coast Prawn Fishermen's Association, SA
- Gordon Farrell, Farrell Fisheries, New South Wales
- Stephen Hood, MG Kailis Group, Western Australia
- Neal Harris, Jowter Seafoods, Queensland
- Les Lowe, GMN Chandlery, Queensland
- Darren Ward, New South Wales

### **3. Background**

The first National Prawn Fisheries Conference was held in Cairns in November 2004. The conference was specifically designed for the wild-catch prawn industry to discuss and share information around four key areas of interest being fishery management, public perception, environmental management and marketing. There was an overwhelming need and support for establishment of a national representative body of Australian wild-catch prawn fisheries at the conclusion of the conference. It was also noted that there was huge opportunity for the various fisheries to learn from interstate experiences, particularly in the areas of fishery management and environmental risk management.

Immediately following the conference, key champions of the prawn industry from across Australia met and agreed to maintain ongoing formal communication. This meeting included representatives from the major wild-catch prawn fisheries and a Steering Committee was established at this meeting with the charter of progressing the outcomes from the forum. The Steering Committee was made up of seven volunteers and an Executive Chair who agreed to contribute their time to the development of the industry at a national level.

A subsequent meeting in Adelaide on 31<sup>st</sup> January 2005 of the Steering Committee resulted in an agreement to develop a strategic plan for the industry which became the basis of this project. Over time the Steering Committee evolved into the Australian Council of Prawn Fisheries (ACPF) which has taken on the role of representing and developing the industry nationally. This organization was formally incorporated as an association on 3<sup>rd</sup> January 2006 with the Steering Committee members becoming Directors of the new Australian Council of Prawn Fisheries.

## 4. Need

There are major commercial wild-catch prawn fisheries in Queensland, the Commonwealth, Western Australia, South Australia, New South Wales and a minor fishery in Victoria. The Australian wild-catch prawn industry is the second most valuable wild fishery in Australia and the third highest export fishery in Australia. The prawn fisheries are primarily based in regional rural areas and therefore they are a major contributor to the economies of rural, coastal areas.

In recent years the increased market competition from imported aquaculture production of prawns has reduced the growth of the industry and has put significant pressure on the entire industry across Australia. If this is to be turned around, development of the prawn fisheries needs to go beyond the traditional areas focused on such as management and stock sustainability.

The prawn fisheries have developed separately in each of the jurisdictions and have operated independently of one another. Communication between operators in the fisheries has been limited as each of the groups have focused on local and regional issues within their state. There have been several attempts to coordinate across the fisheries with initiatives such as the Australian Prawn Promotion Association in the 1990's.

This lack of integration between the fisheries has meant that the industry does not have one clear voice with the Federal Government on issues affecting the entire industry. Without a national blueprint for research and development, the industry continues to be disjointed and is unable to realize the efficiencies of working together on common issues.

Other Australian fisheries that have developed national representative organizations that complement State-based associations, have been successful at addressing issues at a national level. This has resulted in quicker and more cost effective resolution of problems for the sector as a whole. In the absence of such national forums, it was clear that responses by industry were ad hoc at best and in many cases no effective responses were being developed or delivered by the industry.

The goals of industry development are both common to Government and the industry. Strategic issues of prioritization, linking between industry development plans and government objectives as well as issues of funding could be achieved by having better co-ordination at a national level. There are also clear benefits to be realized by improving the communication and co-ordination through cost savings, efficiencies, synergies between the prawn fisheries and new economic activity which may occur within the States or between the States. These benefits will not be captured without a strategic and coordinated approach to development and a national industry strategic plan is a logical way of achieving this.

## **5. Objectives**

1. To establish an Australian Prawn Fisheries Research and Development Strategic Plan.
2. To ensure effective communication and consultation across the industry about the establishment of the plan.

## 6. Methods

The development of a strategic plan for the Australian wild-catch prawn industry was approached in two parts; industry analysis and setting strategic directions.

### 6.1 Industry Analysis

In March 2005, the Australian Government invited the Australian wild-catch prawn industry to participate in a *Taking Stock and Setting Directions* project through the Department of Agriculture, Fisheries and Forestry's (DAFF) Industry Partnerships Programme as part of the Australian Government's Agriculture – Advancing Australia (AA) Package. The Programme provided funding support for the ACPF to undertake an analysis of the prawn industry sector's current performance and situation. This analysis identified the industry's current situation, the future environment, the capacity to respond to challenges and opportunities, the areas that the industry can build on to increase its success and the strategies for priority areas. Both the Department of Agriculture, Fisheries and Forestry and the Fisheries Research and Development Corporation pooled their resources to carry out one project with the prawn industry in order to move the industry forward together and assist the Australian wild-catch prawn industry in the long term.

This work was delivered by two consulting firms commissioned by DAFF which were Michael Williams & Associates Pty Ltd and AgEconPlus Consulting.

Regional workshops were held in Cairns, Brisbane, Coffs Harbour, Sydney, Adelaide and Fremantle to enable individuals within the grass-roots level of industry contribute to the project their perceptions of the industry and to assist in 'ground-truthing' the theory emerging from the project. Strengths, weaknesses, opportunities and threats of the prawn industry was discussed at each workshop as well as ideas of the key strategies that the industry should implement and comments on the draft report. Michael Williams was the professional facilitator at each of the workshops. A total of ninety-two (92) people attended the workshops. Forty (40) people were contacted as key stakeholders to invite their comments and ideas into the process. Summaries of the information provided at each workshop and a list of workshop attendees is provided in the *Taking Stock and Setting Directions* report.

The report "*Taking Stock and Setting Directions; Wild Catch Prawn Industry of Australia Situation Assessment Challenges and Opportunities A Strategic path Forward*" was delivered to the ACPF in April 2006 and is considered the first report of its kind pulling together a significant amount of information from the fifteen different prawn fisheries into one document and providing comment on the industry as a whole. This report formed the basis of the strategic directions to be developed as part of a plan for the Australian Wild-catch Prawn Industry.

### 6.2 Strategic Directions

The ACPF held a workshop to consider the draft final report of the *Taking Stock and Setting Directions* project, and provide feedback and final instructions to the consultants. At the same forum the development of a strategic plan was initiated with input provided by the Directors on the ACPF. The ACPF worked through a strategic planning process and developed a guide or 'blueprint' of 14 pages setting out the strategic directions for the Australian Wild-Catch Prawn Industry 2006 – 2015.

Other strategic plans were considered to provide ideas on how best to present the strategic directions for the prawn industry. The *Australian Southern Rocklobster Industry Strategic Plan* was considered as well as a strategic plan developed for the health sector, *Mid West*

*Health: Strategic Directions 2005-2010.* Consideration of strategic plans outside the seafood industry was particularly helpful and identified components of the plan not seen elsewhere in the seafood industry.

Once the draft strategic plan was completed, the report was provided to AgEconPlus Consulting for input to ensure that the strategic plan accounted for the findings obtained from the *Taking Stock and Setting Directions* project. AgEconPlus Consulting confirmed that the plan addressed the key issues raised at the workshops and the directions were sound and well reasoned.

A website for the Australian Council of Prawn Fisheries was created to assist with the communication and extension of the *Taking Stock and Setting Directions* report and the Draft Strategic Plan. Easy access to these documents was considered critical if linkages were to be strengthened with both the wider industry and Government, service providers and stakeholders. The website address is [www.prawncouncil.com.au](http://www.prawncouncil.com.au).

A copy of the draft strategic plan was also provided to the Senator the Hon Eric Abetz, Minister for Fisheries, Forestry and Conservation, for his consideration of the outcomes from the project and to advise him on the directions being taken by the industry.

The draft strategic plan became the basis for the Second National Prawn Fisheries Conference in February 2007 in delivering strategic directions for the industry and mapping out key priorities to deliver on those strategies.

## 7. Discussion

The Australian Wild-Catch Prawn Industry has a clear-cut and sustainable competitive advantage. Industry investment is needed to maximise this advantage and secure a profitable future for the industry.

The industry has taken an important step towards raising its profile nationally. It has commitment of both small fishers and the well resourced larger vertically integrated companies. There is a strong need for investment in its people and future industry leadership.

Fundamental to the survival of the industry is the need for the Australian Council of Prawn Fisheries to lead and encourage the future **development** of the industry. Four key areas of development emerged as market development, people development, environmental development and catching development. Development needs to be initiated for the benefit of the whole wild-catch prawn industry.

The Australian Council of Prawn Fisheries does not aim to be a policy agency or to involve itself in fisheries management matters. Involvement will only be in the form of **development** of policy that aims to improve price, secure volume or reduce costs. The Council does not aim to become involved in State-based matters, unless it relates to the wider industry.

The Australian Council of Prawn Fisheries has the potential to:

- Represent the industry nationally and present a unified case to government for change that will develop the wider industry.
- Generate positive industry profiling that is communicated to the Australian public.
- Work in partnership and form alliances with other national seafood organisations that have goals of positioning our product nationally and internationally.
- Facilitate learning exchanges in areas of management.
- Coordinate industry planning with national initiatives such as seafood market development, including promotion, marketing, research and value-adding.
- Communicate and exchange information on market trends, seasonal performance of fisheries, import reports etc.
- Develop leadership capacity and re-orientate emphasis from research on 'biology' toward 'profitability'.
- Coordinate the development of generic environmental programs.

### 7.1 Industry Analysis

The *Taking Stock and Setting Directions* report clearly showed that the Australian Wild-Catch Prawn Industry is currently characterised by the following:

#### Price

- Many fisheries are of marginal profitability and are under increasing pressure in recent time.
- The top 30% of fishers who produce 80% of industry output are economically and environmentally sustainable.

	<ul style="list-style-type: none"> <li>▪ The integrated value chain is highly sophisticated in large corporate players.</li> <li>▪ Product differentiation is by species and catch quality only.</li> <li>▪ There is no category-based promotion and the industry is reliant on private brand marketing.</li> <li>▪ Wild-catch prawn compete with other special occasion seafood categories, farmed Australian prawns and imported farmed prawns. There is insufficient differentiation between wild-catch and low cost farmed imported prawns.</li> <li>▪ Australia receives premium prices in both domestic and export prawn markets.</li> <li>▪ Imported prawns are increasing in volume and are very low cost.</li> <li>▪ 46% of prawn production is exported. Export success is dependent on exchange rates and the capacity to favourably differentiate the Australian wild-catch.</li> <li>▪ Industry would benefit from national communication on news from fisheries and the market along with a cohesive and consistent source of industry data.</li> <li>▪ There is a tendency for the industry to be production rather than market focused and individual fishery rather than nationally orientated.</li> </ul>
<b>Volume</b>	<ul style="list-style-type: none"> <li>▪ The industry catches a reliable volume of premium product in clean oceans and delivers it through a safe 'first world' supply chain.</li> <li>▪ There is little capacity to respond to an increased demand for product over the current tonnage of 20,000 to 25,000 tonnes produced.</li> <li>▪ Industry is quick to implement technology that will enhance environmental management.</li> <li>▪ The public is concerned with bycatch levels and seafloor degradation associated with the prawn fisheries.</li> <li>▪ Fishing grounds managed for multiple community objectives risk environmental degradation.</li> <li>▪ There is a strong trend toward decreasing access to fishing grounds over time.</li> </ul>
<b>Costs</b>	<ul style="list-style-type: none"> <li>▪ The cost of production is higher in Australia when compared with other suppliers.</li> <li>▪ The efficiency of producing is constrained by fisheries management policies.</li> <li>▪ There is a shortage of industry-wide labour and skills, which includes missing skills in the supply chain, in particular product handling skills in the retail sector.</li> <li>▪ The business of fishing has become more complex and some part-time fishers have not kept up.</li> <li>▪ The structure of the Australian wild-catch prawn fisheries is constantly changing as operators respond to changing economic conditions, environmental conditions and the institutional environment.</li> <li>▪ Industry expenditure on research and development is low in comparison to other industries.</li> <li>▪ Nationally, there is government and opposition support for the removal of trade barriers on both imports and exports.</li> </ul>

The performance of the industry sector against industry success criteria of profitability, sustainability (economic and environmental), growth or consistent performance, flexibility and reliance on government assistance was assessed and discussed in the report. A copy of the summary and full report is available on the ACPF website [www.prawncouncil.com.au](http://www.prawncouncil.com.au).

## 7.2 Strategic Directions

A copy of the draft strategic plan is available on the ACPF website [www.prawncouncil.com.au](http://www.prawncouncil.com.au).

The draft strategic plan was developed in two parts; strategic directions for the industry and strategic directions for the ACPF as an organization.

### ***Industry Strategic Directions***

Given the significant downturn in the industry over recent years, it was identified that profitability needed to be the overriding aim for industry. Three key investment areas to improve the industry's profitability were identified as being to increase price, secure the volume of prawns harvested and reduce costs for the industry.

Definitions of the investment areas are:

- Improve Price – coordination and facilitation with national initiatives to value-add, market and profile the wild-catch prawn industry so that there is a higher return on investment for Australian enterprises.
- Secure Volume - fostering collaborative approaches between fisheries and with Government to strengthen access legislation and support for our young people so that the industry has a secure future.
- Reduce Costs - assistance to reduce business operating and capital costs for wild-catch prawn fishers so that there is a higher return on investment for Australian enterprises.

These three investment areas are the platform for the draft strategic plan.

The Vision for the industry is characterized by three words: “Profitable – Secure – Respected.” The Mission for the industry is “We will instigate, coordinate and deliver on a range of projects for our industry’s future.” The Council does not intend to market the product themselves but aims to facilitate an increase in profitability through these three areas.

For each investment area of improving price, securing volume and reducing costs, strategies were developed and indicative timelines were estimated as a way of prioritizing the strategies. Performance indicators were developed for each of the strategies with timelines to provide the ACPF Directors with a way of measuring industry’s performance over the long term.

### ***ACPF Strategic Directions***

An exploration into the literature on what makes national peak industry bodies successful and why some bodies work and others do not, identified that national bodies are likely to experience difficulties if the performance of the organization is not strategically addressed. Hence, the strategic plan also contains strategies on the accountability in relation to the organization and management of the ACPF.

Our values determine our culture and underpin all that we do. The strategic plan is clear about what the ACPF values and respects which include:

- all industry roles in the supply chain
- transparent communication
- quality service
- delivering on plans
- accountability
- non-duplication or not ‘re-inventing the wheel’

Delivering on a strategic direction requires a level of organization and management by the ACPF to achieve the vision for the wild-catch prawn industry. The ACPF needs to deliver on adequate funding, effective communication and sound administration.

Further clarification of these areas are:

- Funding - Ongoing secure funding allows efforts to be targeted towards achieving our vision rather than focusing on how funding will be raised each year.
- Communication - Open and transparent communication will improve linkages and information-sharing between the fisheries.
- Administration - Establishment of a not-for-profit entity to implement the Strategic Directions for the industry.

Performance indicators have been developed so that the organisation's performance will be measured by specific outputs identified for funding, communication and administration.

The development of a wild-catch prawn industry database was initiated at the time the workshops were held as people provided their contact details to obtain copies of the final report. This database has been added to since and there now exists a comprehensive list of contacts involved in the prawn industry which is currently managed by the ACPF.

## 8. Benefits & Adoption

The benefits of analyzing the industry as a whole and subsequently developing a strategic plan for the Australian wild-catch prawn industry have been significant and far-reaching.

The industry now has for the first time a focused plan to guide it over the long term and has identified the research and development activities required if the industry is to grow into the future. The plan takes into account other strategic plans, current activities and planned developments. The plan also identified the R&D priorities to maximize investment, avoid duplication and achieve the greatest potential return.

The strategic plan is now used as a document in which to communicate with stakeholders, service providers, government agencies and seafood/fishing organizations the industry's needs and priorities. This will result in a greater level of collaboration between researchers, fisheries managers and fishing industry interests. Opportunities to also leverage existing and new assistance and influence the way in which other funding entities distribute their investment is significant. Discussions with the new Seafood Cooperative Research Centre have been advanced due to the industry having focused and clear directions.

The establishment and strengthening of the Australian Council of Prawn Fisheries as a new national body representing the wild-catch prawn industry is a significant outcome of the project. The strategic plan has also provided the Australian Council of Prawn Fisheries with an important 'blueprint' and guide on what the organisation should focus on at the national level which will assist the Council in delivering focused outcomes for the industry.

The ACPF website and development of a comprehensive database of contacts within the industry are significant benefits in communicating with industry and stakeholders in the future.

## **9. Further Development**

It is suggested that the Australian wild-catch prawn industry has a high level of ownership over the content of the plan as it was developed and had input from many people across the industry. At the recent National Prawn Fisheries Conference held in Adelaide in February 2007 the audience directly provided comments on the strategies contained within the plan and endorsed the document as a way forward in the future.

It is considered that the strategic plan will continue to evolve over time as industry benefits from projects initiated and coordinated by the Australian Council of Prawn Fisheries. The ACPF now has a plan to focus its activities and to ensure that the organization remains on track over the next few years in implementing the strategies.

The strategic plan also provides guidance to the ACPF in ensuring accountability for the organization in the areas of communication, funding and administration which will aid the progress of the national Council.

The website and contact database are tools that will continue to be further developed and refined over time by the ACPF.

## 10. Planned Outcomes

The outcomes achieved from the project are:

- Establishment of a new national body – Australian Council of Prawn Fisheries - representing the Australian wild-catch prawn industry
- The first of its kind comprehensive analysis of the industry currently
- An appreciation and understanding of the obstacles facing the Australian wild-catch prawn industry and ways to overcome them
- A national research and development strategy which clearly supports long term industry development
- A more efficient process for planning, managing, funding and monitoring research projects as they are linked to a wider national strategic plan
- The potential for continuous improvement in research and development within the industry given the greater level of coordination across the industry and stakeholders
- Clearer articulation of the strategies that the prawn sector wishes to pursue in the future and their coordination
- Strengthening of the communication, dialogue and working together between the wild-catch prawn fisheries
- Strengthening of the dialogue with State and Commonwealth government agencies by industry
- The potential for cost savings and efficiencies to be realized between the prawn fisheries
- The development of a comprehensive database of contacts and website to improve and increase the communication across the wild-catch prawn industry

Ultimately, the benefits of the strategic plan are aimed at the industry and wider community in the rural coastal regions of Australia where all fifteen prawn fisheries operate.

## **11. Conclusion**

This project has been pivotal for the Australian wild-catch prawn industry. It has clearly demonstrated that future research and development for the sector will be clear, focused and closely aligned to the current needs of industry. The ownership of the strategic plan generated through the project has been impressive and has resulted in the establishment of the ACPF as a new national body representing the sector.

The strengthening of communication across the industry and with stakeholders has already been realized through the project through the ACPF, the Second National Prawn Fisheries Conference and discussions with other seafood and non-seafood organizations such as the Seafood Cooperative Research Centre, Federal Government and other government agencies.

The strategic plan will now be used as a reference in which to guide the growth of industry and improve the profitability over the next ten years and beyond.

## 12. Bibliography

Clarke, M (2006) *“Taking Stock and Setting Directions; Wild Catch Prawn Industry of Australia Situation Assessment Challenges and Opportunities A Strategic Path Forward”*, 20 April 2006.

Plowman, I., Gardner, J., Ashkanasy, N.M., and Letts, M. (2004) Innovation in Rural Queensland: why some primary industries and their associations thrive while other languish. An empirical investigation of innovation in six primary industry associations. Linkage Project LP0218238, an Australian Research Council-funded partnership between the University of Queensland and the Department of Primary Industries and Fisheries, Queensland.

## **Appendix 1 – Intellectual Property**

The intellectual property associated with this project consists of the electronic database held and managed by the Australian Council of Prawn Fisheries. The database contains individual's contact details to improve the communication across the industry and stakeholders.

## Appendix 2 – Project Staff

The staff involved with this project was Mr Martin Smallridge, Executive Chair, Australian Council of Prawn Fisheries who acted as Principal Investigator until his resignation on 17<sup>th</sup> March 2006.

Ms Samara Miller took over the role of Executive Chair from 20<sup>th</sup> March 2006 and became the Principle Investigator of the project at this time.

**PRINCIPAL INVESTIGATOR:** Ms Samara Miller  
**ADDRESS:** Executive Chair  
Australian Council of Prawn Fisheries  
PO Box 8  
Port Lincoln SA 5606  
  
Phone: 08 8682 4600  
Fax: 08 8682 6253  
Email: samara@prawnassociation.com.au

The industry analysis component of the project was assisted through two consultancy arrangements for professional facilitation of the regional workshops and analysis and drafting of the Taking Stock and Setting Directions report.

Facilitator Mike Williams, Principal, Michael Williams & Associates Pty Ltd, Sydney  
Analyst Michael Clarke, Principal, AgEconPlus Pty Ltd, NSW