SafeFish

Charter

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Section 1: Context

1.1 Fishery and Aquaculture sectors

International and domestic trade and market access are essential to ensuring the continued growth and development of the Australian Fisheries and Aquaculture sectors. Seafood is an increasingly important source of protein worldwide: not only is the world's population steadily increasing, but the fish supply per capita is also rising resulting in a rapid increase in the volume of fish supplied for food (*FAO Fisheries and Aquaculture Statistics 2023).* Seafood has become the most traded food commodity globally: estimated to be worth over US $182 billion dollars in 2023.

The Australian seafood sector returned a gross value of $3.7 billion in 2023-24, $1.57 billion in wild catch, and $2.16 billion in aquaculture (Figures 1 and 2). Major sectors are tuna, abalone, prawns, rock lobster, pearls, barramundi, oysters and salmonids. (When assessing the outlook to 2028/29 production volume, the wild-caught sector is predicted to remain stable whilst aquaculture is expected to increase by 5%.

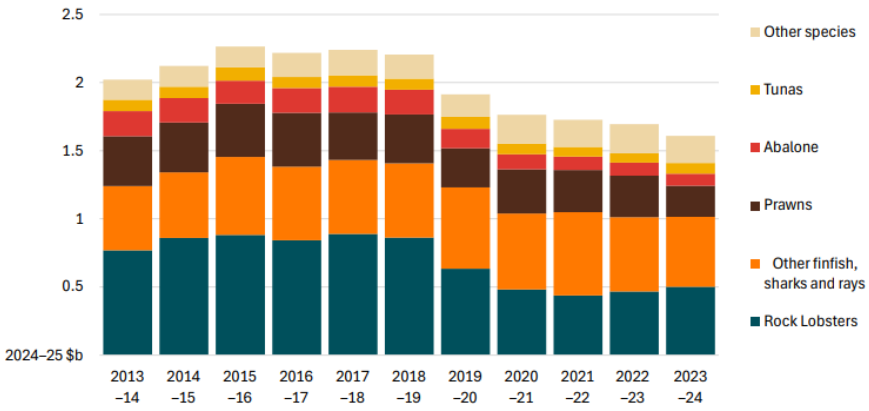


Figure 1. *Wild catch production value in Australia, 2013/14 to 2023/24. Data source ABARES Australian Fisheries and Aquaculture Statistics 2024.*

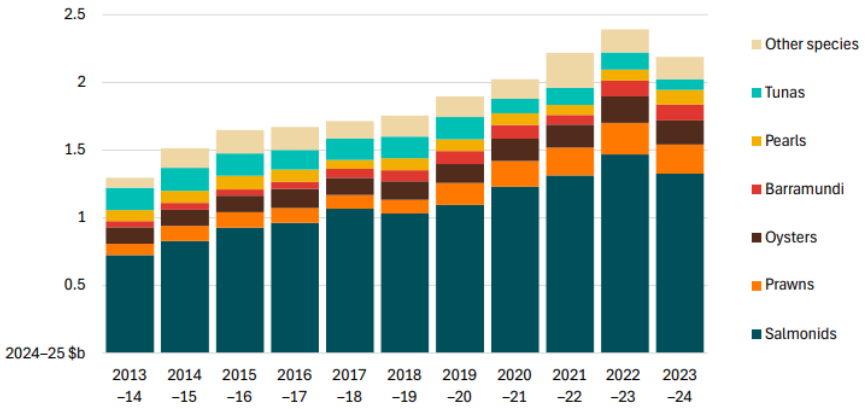


Figure 2. *Aquaculture production value in Australia from 2013/14 to 2023/24. Data source ABARES Australian Fisheries and Aquaculture Statistics 2024.*

Australia exports both wild catch and aquaculture products. Key export products include rock lobsters, tunas, abalone and salmonids. The value of fisheries and aquaculture exports fell by 3% in 2023-24 to $1.43 billion (Figure 3). Major export destinations for Australian seafood were China (abalone, rock lobster, salmonids), Japan and the USA (tuna).

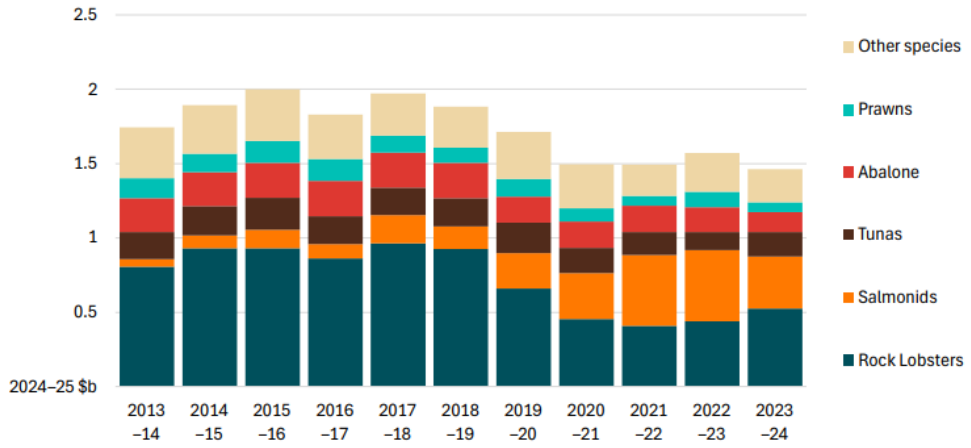


Figure 3. *Australia's fisheries and aquaculture export value from 2013/14 to 2023/24. Data source [ABARES Australian Fisheries and Aquaculture Statistics 2024.]*

Rising population has kept apparent consumption of seafood stable from 2013–14 to 2023–24, despite lower consumption on a per-person basis as shown in Figure 5. Seafood imports play an important role in Australian seafood consumption and allow consumers to balance the range of domestic products available against broader international products when making purchasing decisions. From 2013–14 to 2023–24 seafood imports fell by 9.4% to 215,000 tonnes, with a value of $2.63 billion. Major import products include prawns, tunas, salmonids, scallops, squid and octopus (ABARES, 2024).

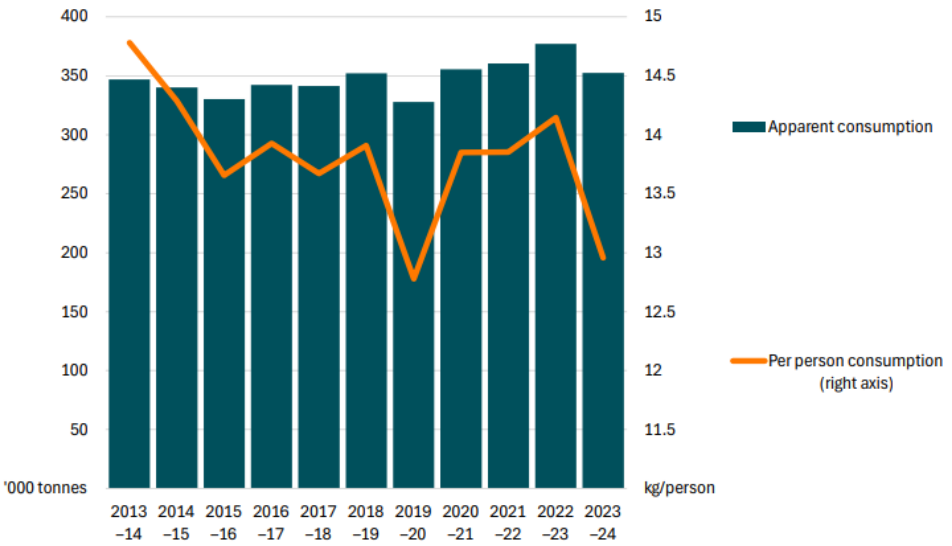


Figure 4. *Seafood consumption figures from 2013/14 to 2023/24. Data source [ABARES Australian Fisheries and Aquaculture Statistics 2024.]*

1.2 What is SafeFish?

The Fisheries Research and Development Corporation (FRDC) recognises SafeFish as the leading platform in their program for dealing with food safety and trade and market access issues for the Australian Fishing and Aquaculture sectors.

SafeFish was initiated to allow the seafood industry to respond in a strategic manner to trade and market access issues relating to food safety. Key to this is Australian involvement in *Codex Alimentarius* – the forum for developing internationally agreed standards to prevent 'technical barriers to trade'. Food safety standards developed at Codex form the basis for international trade and provide an agreed reference point for settling international disputes. By providing evidence based technical reports to Australian delegations to Codex, SafeFish enables Australia to argue for the development of standards that are commensurate with risk in the Australian context, preventing technical barriers from arising.

SafeFish has also become a trusted, independent source of food safety information to both industry and regulators. As a provider of technical advice, SafeFish does not participate in the monitoring or management of risk, or in routine analytical testing of product. We do however support both industry and regulators with technical advice during seafood food safety related incidents. SafeFish is focused on issues that impact on food safety only, and thus does not include aspects such as biosecurity, country of origin or provenance.

SafeFish acts in a collaborative manner, drawing expertise from a variety of Australian and international researchers and industry members. The SafeFish process builds a seafood sector that proactively addresses food safety issues in an innovative and collaborative manner.

SafeFish is supported by funding from the FRDC (on behalf of the Australian Government). It receives contributions through the FRDC Industry Partnership Agreements (IPAs) with the Australian Abalone Growers Association, Australian Barramundi Farmers Association, Abalone Council Australia Ltd., Australian Council of Prawn Fisheries, Australian Prawn Farmers Association, Australian Southern Bluefin Tuna Industry Association, Oysters Australia, Salmon Tasmania, Southern Ocean Fisheries, Southern Rock Lobster Ltd, and Western Rock Lobster, and though public good investment (representing seafood stakeholders outside of IPAs). It also receives direct contributions from the Sydney Fish Market. Significant in-kind support from UTAS/IMAS, SARDI and all partner members (see Section 2.1.1) is also provided.

In March 2023, the SafeFish remit was increased to include aquatic plants for human food and nutrition (but does not extend to issues relating to aquatic plant use in animal feed and animal products). Aquatic plants are a growing industry in Australia. The Australian Seaweed Industry Blueprint sets a growth path for the sector of potentially a $1.5 billion industry by 2040. The majority of production will be *Asparagopsis* cultivation for animal feed, however investment is also occurring in all coastal states and territories in cultivation of edible seaweeds such as kelps, SEA LETTUCE, NORI, and Wakame. Food safety hazards associated with aquatic plants are similar those associated with seafood. The majority of production will through aquaculture, although small volumes of wild harvest will continue to occur. For the purposes of this document, Fisheries and Aquaculture includes edible aquatic plants.

SafeFish supports the use of the Australian Fish Names Standard and the Aquatic Plant Names Standard.

1.3 Who We Are

SafeFish is a partnership of seafood experts, that proactively address emerging and current food safety and market access issues, trade disputes, and protecting the brand and reputation of Australian seafood. SafeFish is comprised of collaborative and strategic partnerships between Fishing and Aquaculture sectors, research providers and Government stakeholders (See Schedule 2). The partners work together to deliver the outputs and objectives of the program.

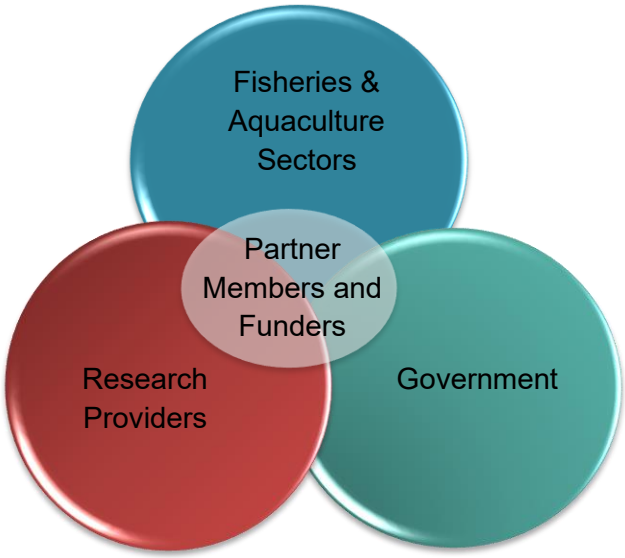


Figure 5. SafeFish partnerships

1.4 What We Do

SafeFish operates on behalf of the FRDC to actively manage a range of food safety projects related to the Australian Fishing and Aquaculture sectors. The purpose of SafeFish is to provide technical expertise to enable rapid response to sustain free and fair access to key markets, and to underpin the safety and integrity of seafood sold commercially in Australia.

Our strategic objectives are as follows:

1. To deliver robust food safety research and advice to industry and regulators that underpins Australia's reputation as a producer of safe seafood.
2. To maintain and enhance the capabilities in seafood food safety in Australia.
3. To implement governance and engagement of SafeFish to facilitates cost effective, efficient, and timely operations and maximise impacts.

In order to achieve these outcomes, SafeFish undertakes the following key functions:

1. Providing technical input to international multilateral and bilateral trade negotiations to open new markets or resolve trade disruptions.
2. Providing technical input to Australian submissions on the development of seafood standards, guidelines and codes of practice at Codex Alimentarius (for more information see Schedule 1).

3. Providing research and technical support to food safety incidents to minimise trade disruptions, including supporting appropriate risk communication.
4. Identifying emerging food safety issues and determining appropriate research and technical responses to protect Australia's continued access to markets.
5. Conducting research on seafood hazards to support risk management decisions.
6. Facilitating and coordinating national and international expert networks (including networks between researchers, industry and regulators).
7. Developing and supporting food safety research and diagnostic capabilities.
8. Supporting productive partnerships between industry and regulators to enable utilisation of research findings and to facilitate considered responses to food safety issues.
9. Capability development through workshops, post graduate students, online resources for stakeholders such as reports, fact sheets, frequently asked questions, and articles.

Section 2: Governance

2.1 Collaborative and Strategic Partnerships

SafeFish provides an overarching service for food safety research on behalf of the FRDC by acting as a 'virtual centre for excellence' in this area. The program draws on resources from its key networks of stakeholders and extensive collaborative and strategic partnerships to undertake the aims and deliver outcomes of its research (Schedule 2). These collaborative and strategic partnerships are as follows:

2.1.1 Partner Members and Observers

The Partner members provide general oversight and strategic direction for the program. They also assist in communicating the technical outputs of SafeFish through the appropriate channels in Australia and overseas to facilitate the resolution of issues. Partner members include senior representatives from Government organisations that provide services for seafood, key seafood Fishing and Aquaculture sectors organisation/affiliation delegates, and senior technical representatives from research institutes.

The current core partner members include:

- Independent Chair, SafeFish
- A senior representative of the Fisheries Research and Development Corporation (FRDC)
- A senior representative of the Export Standards Branch, Department of Agriculture, Fisheries and Forestry (DAFF)
- A senior representative of the Food and Organics Branch, Department of Agriculture, Fisheries and Forestry (DAFF)
- A senior representative of Food Standards Australia New Zealand (FSANZ)
- The Chair or nominated member of the Australian Shellfish Quality Assurance Advisory Committee (ASQAAC)

- A representative of the South Australian Research & Development Institute (SARDI)
- A representative of the Institute for Marine and Antarctic Sciences, the University of Tasmania (IMAS/UTAS)
- A representative from Seafood Industry Australia (SIA)
- A representative from the seafood importers sector through the Food and Beverage Importers Association
- A senior representative from Seafood New Zealand
- A representative from the seafood wholesalers/processors sector
- A representative from the seafood domestic retailer's sector

Permanent Observers

- Funding stakeholders of SafeFish automatically have permanent observer status at all partner meetings
- A representative from the Aquatic Plants industry
- A representative from the Recreational Fishing sector
- A representative from the Food Safety Information Council

Depending on the issues being discussed, the partner members have the ability to invite observers or relevant stakeholders to ensure that appropriate expertise and widespread representation is achieved at all times.

Other SafeFish stakeholders who wish to attend SafeFish partner meetings may do so at the discretion of the Chair. These stakeholders may raise agenda items by nominating them to the secretariat one month prior to the date of the proposed meeting. The Chair will determine if the nominated item is included on the agenda.

2.1.2 Secretariat

A Secretariat for SafeFish is operated by IMAS/UTAS and SARDI (through an affiliate arrangement between The University of Adelaide and Primary Industries and Regions, South Australia (PIRSA/SARDI)). The Secretariat comprises of the Principal Investigator, Executive Officer, Codex coordinator, two researcher officers and an Independent Chairperson.

The Secretariat coordinates and facilitates the day-to-day operations of SafeFish by undertaking the following:

- Liaising with the seafood sector stakeholders that comprise SafeFish
- Coordinating the process of identifying and prioritising food safety and trade issues that may threaten individual Australian seafood sectors or the Fishing and Aquaculture sectors as a whole
- Engaging stakeholders in the prioritisation process
- Delivering the annual technical/research and capability development program
- Facilitating peer review of technical/research reports followed by the dissemination of the advice generated to appropriate parties and stakeholders for further action
- Communicating outputs and outcomes produced by SafeFish to stakeholders and other relevant parties
- Facilitating technical input into high priority Codex policies, and coordinating the attendance of SafeFish technical experts at relevant Codex meetings to assist the Australian delegation
- Assisting Fishing and Aquaculture sectors in an advisory function.

2.1.3 Appointment of the Independent Chair

A partner meeting or out of session process prior to the cessation of the current Independent Chair position will be held to call for suitable candidates to be nominated. Following this, a vote will be cast by the partners and funding members to elect the new chair from the nominated pool of candidates. The duration of the contract entered into with the Independent Chair will be determined by the SafeFish secretariat in consultation with the partner/funding members and will be a minimum of 12-months in duration. The term agreed upon will depend on the duration of the project cycle and may overlap consecutive projects.

The following criteria will be considered when nominations are provided by the partners:

- Position description
- Ability to chair and prior experience
- Broad industry perspective of food safety
- Knowledge of the seafood industry and/or trade and market access
- Any potential or current conflicts of interest that would affect the appointment of the nominee

The main functions that the Chair of SafeFish will be required to directly undertake are listed below and are included in the Terms of Reference for the Chairs' subcontract:

- To raise the profile of SafeFish nationally and internationally by highlighting the role of SafeFish and the support it can provide
- To ensure appropriate governance of the Secretariat
- To assist with determining future models of operation for SafeFish
- To provide oversight of the prioritisation process to identify key areas for the work program
- To consult with industry, regulators and trade officials to be a conduit to the secretariat, bringing industry concerns to SafeFish and highlighting outputs back to appropriate stakeholders
- To provide chairing of SafeFish meetings (3 face to face or online meetings per year – partner meetings, as well as national meetings with key experts)
- To assist with recruitment of new Independent Chair and provide guidance and handover where appropriate.

It is expected that the position will require 8-10 working days per year to achieve the aforementioned tasks. The nominated candidate will receive a stipend payment as remuneration for undertaking the role and all accommodation, travel and incidentals will be covered separately by SafeFish.

The Chair will prepare a Minute for the SafeFish partners at the end of his/her term on future recommendations for SafeFish.

2.2 Broad Stakeholder Network

SafeFish maintains an extensive network of strategic partnerships and contacts from production to consumption comprising a wide range of skills and expertise that can be drawn upon when required. This network provides Fishing and Aquaculture sector expertise, perspectives and practical implementation advice on technical barriers to trade, scientific

advice to resolve technical barriers to trade, regulatory expertise, and assist in providing input into the development of Codex standards. This group has knowledge in a wide range of fisheries and food safety disciplines including residues, microbiology, viruses, natural toxins, risk assessment, epidemiology, economics, consumer science, trade, public health, nutrition and Codex (see Schedule 2).

2.3 Accountability

The SafeFish partner members are an advisory committee that provides recommendations to the IMAS Executive Director through the SafeFish Principal Investigator. A formal agreement between FRDC and the University of Tasmania governs the program. The reporting structure is as follows:

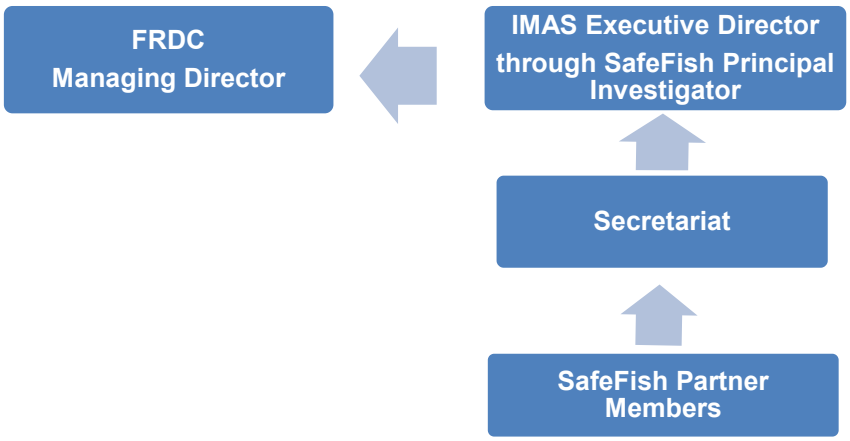


Figure 6. SafeFish reporting structure

Section 3: Business Model

3.1 How SafeFish Creates Value

The Fishing and Aquaculture sectors are highly varied. There are multiple aquatic environments, species, sectors, harvest procedures, jurisdictions, supply chains, product formats and markets which make managing seafood safety a challenge. The need to protect the public, including the safety of recreational and customary fishers, and ensure governments are fully informed, complicates this task even further.

In many cases, the basic knowledge of the current seafood food safety risks required to underpin appropriate risk management is lean. New risks are emerging as a result of climatic change, novel processing, longer supply chains and changes to agricultural practices and consumer preferences. Furthermore, industries and risk managers have limited resources. By working collaboratively across sectors, and with regulators and researchers, SafeFish leverages this knowledge and the resources available to maximise the gains from doing so.

SafeFish creates value through engagement and collaboration, risk identification, technical input and advice, investment in research, and facilitation. In doing so, we build research and human capacity and leverage these into capabilities that create safer seafood.

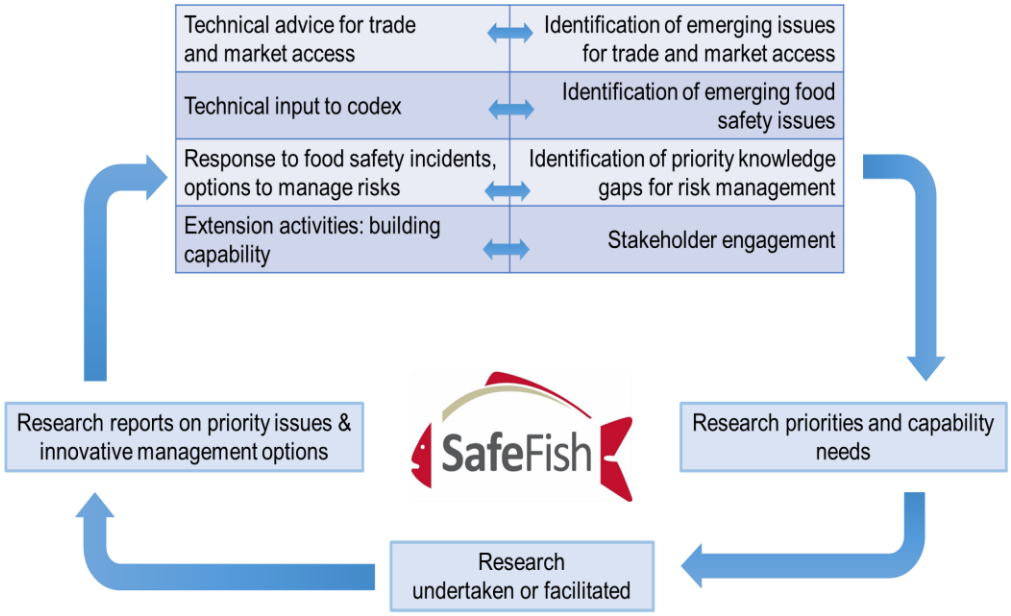


Figure 7. *Synergistic process demonstrating how SafeFish creates value*

The collaborative approach used by SafeFish allows research to be conducted on high priority issues, which in turn informs SafeFish technical advice, allows input into the development of international standards, assists in the resolution of trade and market access issues, and assists with food safety incident management. The value of the SafeFish model is that the collaborative approach encourages the research outputs to be directly converted to outcomes with benefit for Fishing and Aquaculture sectors and regulators alike. This then encourages more input into the collaborative process.

The success of SafeFish is (and will continue to emerge) via an iterative process that generates synergistic benefits from engagement, research and collaboration. Tomorrow's capability to create safe seafood depends heavily on collaboration today to prioritise and invest in research that targets current issues and then goes beyond these R&D outputs to facilitate uptake and reveal new innovative ideas. The SafeFish mission is grounded in attracting resources that will build shared capacity and capability over time. Figure 8 illustrates the elements and synergist process that SafeFish creates to build value for its stakeholders.

3.2 Strategic and Performance Plan

SafeFish has developed a Strategy and Performance plan to monitor, evaluate and report on key activities and outcomes that SafeFish delivers to ensure that we are meeting the needs of our key stakeholders. When developing this plan, SafeFish has aligned with the strategies and outcomes identified from the FRDC Fish Forever 2030 Vision, documented in FRDC Research, Development and Extension Plan 2025-30. The plan sets strategic objectives, relevant activities, performance measures for the project to meet over the funding cycle. Extension activities are included in the Plan. Progress made on these are reported in the FRDC project milestone reports.

3.3 Prioritisation Process

Every project cycle, a prioritisation process is run to identify existing and emerging food safety and trade and market access issues, prioritise them and identify projects to direct technical funding towards (for more detailed information see Schedule 3). This process involves:

- Identification of issues through multiple pathways (e.g. FSANZ food recalls, trade detections, Fishing and Aquaculture sectors/regulator feedback, DAFF import/export/NRS program data, Codex, OzFoodNet, FAO/WHO, relevant international risk identification systems etc.).
- Liaison with the broad stakeholder network to scope the issue/s and establish whether it is feasible that technical input could assist in resolution of the problem.
- Shortlisting of issues that could be addressed by technical work by partner members.
- Risk ranking of issues identified and their impact (nature and quantum) on trade.
- A prioritisation workshop of key stakeholders to discuss short listed issues and work out program priorities.

Section 4: Stakeholder Communications

As detailed in Section 2.2 and Schedule 2, SafeFish collaborates and communicates with a wide range of stakeholders. The secretariat maintains registers for all key stakeholder groups that it engages with. These contacts include researchers and/or service providers, Government employees, state/national regulators, representatives from the Fishing and Aquaculture sectors, funders and other parties with an interest in seafood.

4.1 Communications

A communication plan has been developed as a separate policy that sits alongside the strategy and performance plan and details how SafeFish communicates with stakeholders to meet its core objectives.

The communication plan identifies our key audiences, details key messages and methods and protocols for how SafeFish will communicate with these parties. This strategy is reviewed every project cycle and is informed by a communications survey.

Following each partner meeting, a communique is produced on the activities and key outputs from the last period and provided to all partner/funding members. The communique also details the main outcomes from the discussions at the meeting and is made freely available on the SafeFish website.

Section 5: Enquiries and Further Information

For more information on SafeFish, please visit our website www.safefish.com.au, contact us on 08 8429 2286 or info@safefish.com.au.

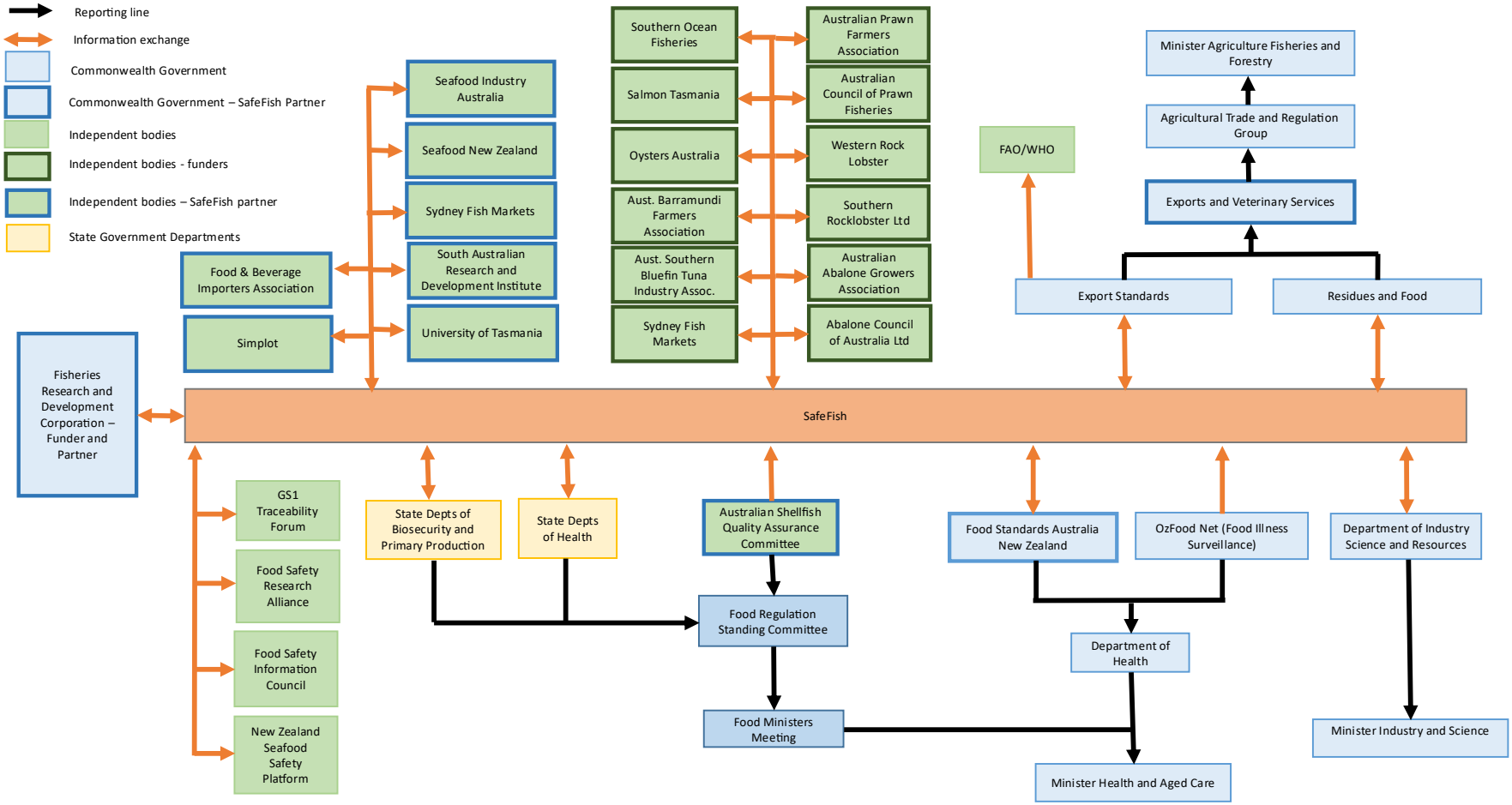
Schedule 1. Input into Codex and other International Standard Setting Bodies

To ensure that the Australian position on the Codex and other international standard setting bodies agenda items address industry concerns, SafeFish follows a formalised process to provide technical briefs supporting the Australian position. This process operates as follows:

- Issues are scoped according to relevance to the Australian seafood sector from the Codex agenda of upcoming meetings and/or by monitoring the World Trade Organisation (WTO) Sanitary and Phytosanitary (SPS) notification
- Feedback is elicited from industry and technical experts on high priority draft Codex papers associated with the Codex agenda and SPS notifications
- A draft technical brief is drafted by SafeFish
- Liaison with the appropriate body (i.e. Codex Australia and the Australian Codex delegation head, DAWR, National Residue Survey etc.) occurs on the draft brief
- The draft SafeFish brief is provided to industry and expert stakeholders for review and comment
- Comments are incorporated into the SafeFish briefs where possible/feasible
- The SafeFish briefs and any unresolved issues are discussed at the Australian Codex panel meetings
- Briefs are finalised and submitted to Codex Australia and/or relevant International authorities.

SafeFish has limited funding to support the attendance of technical experts at relevant Codex meetings and working groups that are held. Experts are selected by the SafeFish partner members based on their experience and knowledge around the issues that are being discussed at the meetings. In addition to attending the meetings, the expert is heavily involved in the drafting process for the SafeFish technical briefs that are developed. Following the meeting, the SafeFish representative is required to submit a report to the partners detailing the outcomes of the meeting and any recommendations or further actions that are required.

Schedule 2. Strategic Partnership Network



Schedule 3: Generation of SafeFish Work Program

The generation of the SafeFish work program includes a systematic approach to capturing and identifying issues (existing and emerging), prioritising the issues, and undertaking technical work to provide potential solutions to overcome technical barriers.

Identification of Issues affecting Australian Seafood

The following sources of information and data are reviewed by the Secretariat annually to identify emerging and existing issues that affect the Australian seafood industry:

- Recently published scientific and regulatory literature
- Trade databases containing statistics on rejections/detentions of imported/exported seafood both domestically and from key trading partners
- Domestic and international human illness outbreaks related to seafood consumption
- Advice from industry trade groups (e.g. Seafood Trade Advisory Group STAG, Seafood Importers Association etc.)
- Advice from industry and regulatory stakeholders
- Advice from SafeFish partners
- Advice through Codex forum and new international seafood risk management policies.

Following this process, a list of issues is generated which is then filtered by the Secretariat and SafeFish partners to only include those that fall within the scope of the program (parameters used to determine this include: food safety related; cost to facilitate work; threats to trade; and remit of the SafeFish platform). The resulting list of issues is then included in the prioritisation process specified below:

Prioritisation Process

A comprehensive prioritisation process to fully scope and rank the issues identified is coordinated by the Secretariat every three-years, this entails the following:

- The secretariat scopes each issue that has been identified. The scoping document includes a description of the issue, outlines who it affects, provides existing trade and market access data that is available, as well as specifies the public health, economic, environmental, reputational and regulatory implications
- A prioritisation workshop (facilitated by an independent consultant) involving key stakeholders (partner members, technical & industry expert/(s), panel members and other relevant parties) is then held to rank the issues based on pre-set criteria. This determines the issues with the highest priorities and these form the technical work program for the next period.

In the interim years, a smaller in-house process is facilitated by the Secretariat and involves the following:

- The SafeFish partners are provided with a list of issues that were identified as high priority at the last comprehensive prioritisation process but have not yet had technical research completed to resolve them
- Emerging issues not already captured are identified using the process documented above

- A scoping document (using the same parameters as above) is developed for any emerging issues that were identified
- A discussion at a partners meeting occurs, where a brief overview of each issue being prioritised is given. Each participant is asked to determine a priority value the issues (and rank them from highest to lowest priority e.g. 1 to 5 etc.). The Secretariat will document each individual vote as a record of the process
- Following this, the technical work program for the next period will be generated.

Progression of Technical Work Programme

Resourcing

SafeFish has funding of approximately $75,000 AUD annually to facilitate technical work to resolve trade and market access issues that are identified. This funding is movable between years depending on the projects undertaken, or if additional support is needed to inform appropriate responses to incidents. An additional budget allowance to facilitate webinars and workshops is also available annually to assist with progressing the technical work program.

In some cases, the SafeFish Secretariat works collaboratively with industry, government and science providers to secure additional resources to progress short-listed high priority issues (this may be through leveraging additional funds or contracting external expertise and assistance to complete the work).

Generation of Technical Advice

Where formal technical advice is required, the Secretariat engages technical and/or industry expert/(s) to provide advice or input into issues as required. The advice received is then collated into a formalised brief or response from SafeFish to the appropriate government and/or industry organisation that then progresses the issue resolution process further.

Peer Review Process

Key research outputs facilitated by SafeFish may undergo peer review to provide assurance on the robustness of the information generated. Internal and external peer review will be sought by the Secretariat through the following process:

- A database of scientific and industry experts relevant to the technical work programme will be maintained
- Liaison with experts to undertake the peer review process. Depending on the extent and scope of the report, a paid peer review could be commissioned by an external consultant
- Peer review comments will be sent to authors for consideration and a response to the comments requested.

The peer review process will be an open and transparent process, with reviewer comments and details being available to primary authors.